

Proposed 2024 Enterprise Projects

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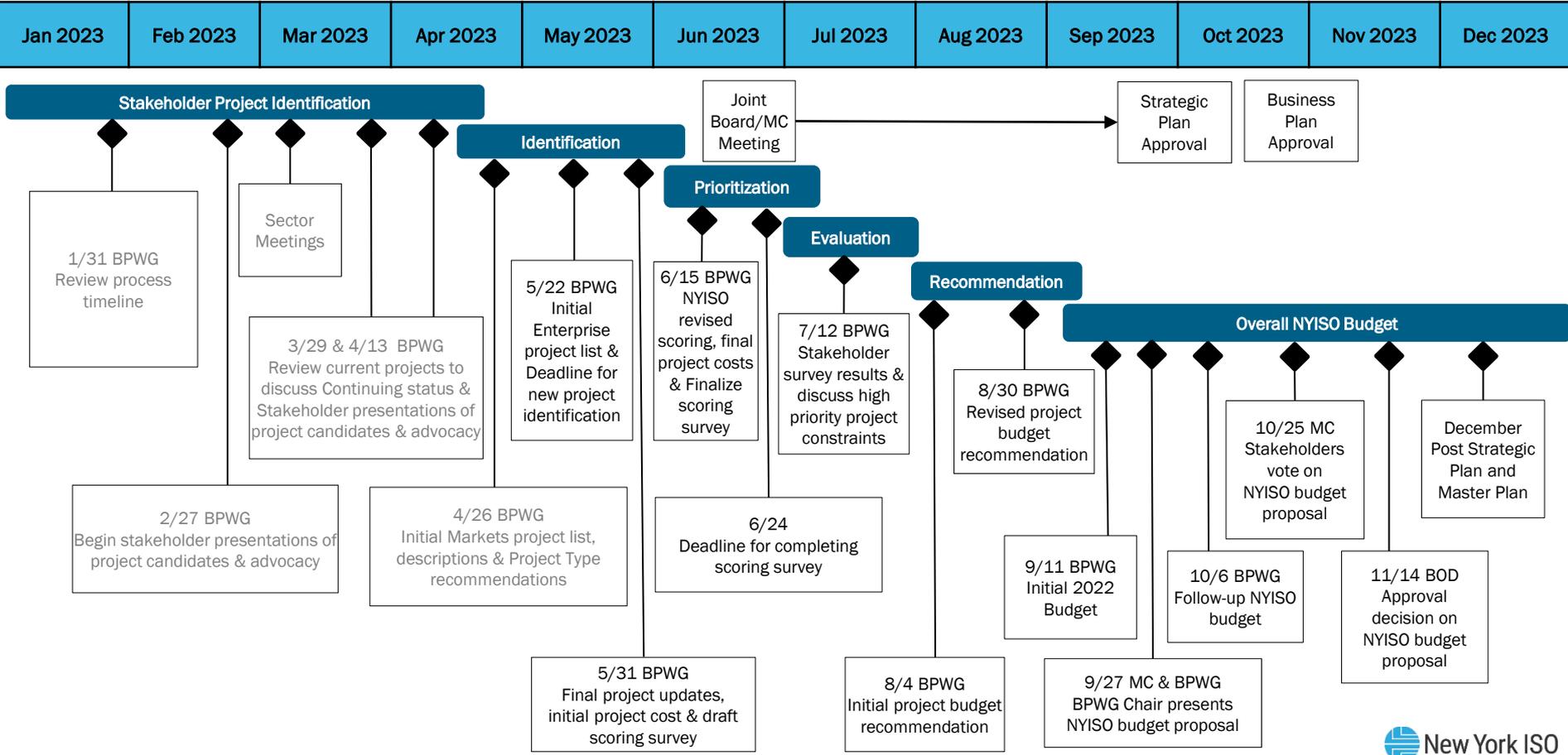
May 22, 2023, KCC

Agenda

- **Project Prioritization Timeline**
- **Project Descriptions**
- **2024 Enterprise Project Candidates**
- **Next Steps**

Project Prioritization Timeline

2024 Proposed Project Prioritization Timeline



Project Descriptions

Project Descriptions

- **The NYISO has developed project descriptions for 54 proposed Enterprise projects**
 - 7 Business & Finance, 6 Capacity Market, 2 Energy Markets, 23 Enterprise, 1 New Resource, 10 Operations and Reliability, 5 Planning & 0 TCC Market
 - 1 Mandatory, 0 Continuing, 53 Prioritize & 0 Future
- **Last year, there were 50 proposed Enterprise projects at this time in the project prioritization process**
- **Project descriptions are included with today's posted meeting materials**

2024 Enterprise Project Candidates

Prioritize 2024 Enterprise Projects

Item	Project	Product Area	Project Type	2024 Proposed Deliverable	2023 Deliverable
1	3rd Floor Data Center Migration (Krey)	Enterprise	Prioritize	Deployment	
2	Access Management Program Enhancements	Enterprise	Prioritize	Deployment	
3	Air Handling Units Replacement (Krey)	Enterprise	Prioritize	Study Complete	
4	Application Platform Upgrade	Enterprise	Prioritize	Deployment	Deployment
5	Automation of DMNC Validation	Operations & Reliability	Prioritize	Deployment	
6	Bidding Upload Download Security Enhancements	Enterprise	Prioritize	Deployment	
7	Block Storage Refresh	Enterprise	Prioritize	Deployment	Deployment

Prioritize 2024 Enterprise Projects

Item	Project	Product Area	Project Type	2024 Proposed Deliverable	2023 Deliverable
8	Budgeting Tool	Business & Finance	Prioritize	Deployment	
9	Building Management System (BMS) Controls Upgrade	Enterprise	Prioritize	Deployment	Deployment
10	Capacity Analysis Commitment Tool (CACT)	Operations & Reliability	Prioritize	Deployment	
11	Cisco Server Refresh - Linux	Enterprise	Prioritize	Deployment	Development Complete
12	CMS and ConInvoice Data Integration	Business & Finance	Prioritize	Deployment	Deployment
13	Conference Room Technology Upgrade	Enterprise	Prioritize	Deployment	
14	ConInvoice Testability Improvements	Business & Finance	Prioritize	Deployment	

Prioritize 2024 Enterprise Projects

Item	Project	Product Area	Project Type	2024 Proposed Deliverable	2023 Deliverable
15	Control Room Logging Replacement	Operations & Reliability	Prioritize	Functional Requirements	
16	Demand Forecasting Operational Reporting Enhancements	Planning	Prioritize	Deployment	Functional Requirements
17	EMS/BMS Operational Enhancements	Operations & Reliability	Prioritize	Deployment	Deployment
18	EMS/BMS Technologies Upgrade	Operations & Reliability	Prioritize	Development Complete	
19	Enhanced Exterior Security Profile (Carmen)	Enterprise	Prioritize	Deployment	
20	Enterprise Project Collaboration	Enterprise	Prioritize	Study Complete	
21	Fence Vibration System Replacement (Krey)	Enterprise	Prioritize	Deployment	

Prioritize 2024 Enterprise Projects

Item	Project	Product Area	Project Type	2024 Proposed Deliverable	2023 Deliverable
22	Generator Data Reporting System	Capacity Market	Prioritize	Study Complete	
23	ICAP AMS Improved System Integrations, Customer Transitions and Offers Project	Capacity Market	Prioritize	Functional Requirements	
24	ICAP Auction Simulator Enhancements	Capacity Market	Prioritize	Functional Requirements	
25	ICAP Supplier Status Enhancements	Capacity Market	Prioritize	Functional Requirements	
26	IT Development and Control of Compliance Reports	Operations & Reliability	Prioritize	Deployment	
27	IT Infrastructure Automation	Enterprise	Prioritize	Deployment	Deployment
28	LDAP Upgrade	Enterprise	Prioritize	Deployment	

Prioritize 2024 Enterprise Projects

Item	Project	Product Area	Project Type	2024 Proposed Deliverable	2023 Deliverable
29	LFDR Upgrade and Enhancements	Planning	Prioritize	Deployment	Deployment
30	Market Validation, Reporting and Penalty Enhancements	Capacity Market	Prioritize	Deployment	Software Design
31	Micro-Segmentation	Enterprise	Prioritize	Deployment	Study Complete
32	Microsoft 365	Enterprise	Prioritize	Deployment	Deployment
33	Midrange and Storage Upgrade	Enterprise	Prioritize	Study Complete	
34	Modernizing ASIS	Enterprise	Prioritize	Deployment	Deployment
35	Network Infrastructure Upgrade	Enterprise	Prioritize	Deployment	Deployment

Prioritize 2024 Enterprise Projects

Item	Project	Product Area	Project Type	2024 Proposed Deliverable	2023 Deliverable
36	New Ties and Gens Management	Business & Finance	Prioritize	Functional Requirements	
37	OASIS Reliability Upgrade	Enterprise	Prioritize	Deployment	Study Complete
38	Office Mechanical Systems (Krey)	Enterprise	Prioritize	Deployment	
39	On-Boarding of New Resources	New Resource	Prioritize	Study Complete	Study Complete
40	Operations - NERC Audit Preparation	Operations & Reliability	Prioritize	Study Complete	
41	Optimization Solver Upgrade	Operations & Reliability	Prioritize	Deployment	
42	Outage States Portal Dashboard	Capacity Market	Prioritize	Functional Requirements	

Prioritize 2024 Enterprise Projects

Item	Project	Product Area	Project Type	2024 Proposed Deliverable	2023 Deliverable
43	Price Correction Report Modifications	Operations & Reliability	Prioritize	Deployment	
44	Procurement and Implementation of PSCAD and E Tran	Planning	Prioritize	Deployment	
45	Production Cost Software Upgrade	Planning	Prioritize	Software Design	
46	Reliability Compliance Tools Enhancements	Operations & Reliability	Prioritize	Deployment	
47	Renewable Energy Forecast Integration and Reporting Enhs	Planning	Prioritize	Issue Discovery	
48	SDX Replacement	Business & Finance	Prioritize	Deployment	
49	Secure Communication Channel with MPs	Energy Market	Prioritize	Deployment	Deployment

Prioritize 2024 Enterprise Projects

Item	Project	Product Area	Project Type	2024 Proposed Deliverable	2023 Deliverable
50	Telemetry Tone Gear Upgrade	Enterprise	Prioritize	Deployment	
51	Thunderstorm Alert	Business & Finance	Prioritize	Functional Requirements	
52	Watchlist for Rest of State Units	Energy Market	Prioritize	Deployment	
53	Windows Server Hardware Upgrade	Enterprise	Prioritize	Deployment	Deployment

Mandatory 2024 Enterprise Projects

Item	Project	Product Area	Project Type	2024 Proposed Deliverable	2023 Deliverable
54	Transmission Project Developer Billing Access	Business & Finance	Mandatory	Deployment	

Next Steps

Next Steps

- **Written feedback on project descriptions and project type categorization may be provided until May 24th for incorporation into May 31st presentation**
 - Send email to Kevin Pytel at kpytel@nyiso.com or call cell at (518) 428-9528 for assistance
- **Final updates to proposed 2024 Market and Enterprise projects to be reviewed at the May 31st BPWG**
- **Stakeholder advocacy and draft scoring survey of Market Projects are scheduled for the May 31st BPWG**
- **NYISO provides its scores for Market and Enterprise projects at the June 15th BPWG**

Our Mission & Vision



Mission

Ensure power system reliability and competitive markets for New York in a clean energy future



Vision

Working together with stakeholders to build the cleanest, most reliable electric system in the nation

Questions?

Appendix – Milestones and Project Prioritization Phases

Milestone Definitions

Milestone	Definition
Issue Discovery	NYISO has facilitated education session(s) for stakeholder knowledge development of problem/issue, conducted stakeholder solicitation of potential solutions to address problem/issue, and summarized findings at a working group meeting for potential ranking and future project identification.
Study Defined	The scope of work for the study has been presented to stakeholders, including a discussion on the necessary input(s), assumption(s) and objective(s) of the study.
Study Complete	Scope of work to be performed has been completed; results and recommendations have been presented to the appropriate Business Owners and stakeholders.
Market Design Concept Proposed	NYISO has initiated or furthered discussions with stakeholders that explore potential concepts to address opportunities for market efficiency or administration improvements.
Market Design Complete	NYISO has developed with stakeholders a market design such that the proposal can be presented for a vote at the BIC, OC, or MC to define further action on the proposal.
Functional Requirements	NYISO has completed documentation of the functional requirements and the Business Owner has approved.
Architectural Design	The architectural design document is complete and software development is ready to begin.
Projects with the following Milestones will generally be proposed as Continuing in future years, subject to Stakeholder input	
Software Design	The software design document is complete and software development is ready to begin.
Development Complete	Development has been completed, packaged and approved by the Supervisor.
Deployment	Required software changes to support commitment have been integrated into the production environment.

Project Prioritization Process

Phase	Description
Stakeholder Project Identification	Stakeholders may present project ideas at stakeholder meetings, sector meetings, get feedback and refine their proposal during this phase before the NYISO provides a comprehensive list of candidate projects for consideration.
Identification	The NYISO develops a Markets and Enterprise project candidate lists from regulatory obligations, strategic initiatives, State of the Market recommendations, infrastructure enhancements, product plans and stakeholder proposals. These are presented and further refined with stakeholder input during this phase.
Prioritization	This phase involves a stakeholder survey and the NYISO prioritization of projects. The stakeholder survey will facilitate an assessment of the relative priority of the topic within the portfolio and is used to determine stakeholder appeal. The NYISO prioritization incorporates the stakeholder appeal into objective criteria that reflects strategic alignment, expected outcomes, risks, and ability to execute in development of a priority score for each Market project.
Evaluation	This phase involves performing a feasibility assessment based on detailed cost and labor estimates, dependencies, priority scores, and stakeholder feedback.
Recommendation	This phase involves proposing a feasible set of project deliverables and related budget requirements. The proposal is refined as needed based on stakeholder feedback.

Project Type

Project Type	Description
Mandatory	Projects that are key to support Strategic Initiatives, FERC Orders, maintain reliable operations, or sustain the operation of the NYISO business. These projects will be included in the budget
Continuing	Approved in a prior year and have progressed to either Software Design, Development Complete, or Deployment. Additional projects may be classified as Continuing based on stakeholder feedback. These projects will be included in the budget
Future	Consensus from stakeholder discussions of this projects priority relative to other projects has resulted in these projects NOT being prioritized and initiated in the coming budget year. Resources, time constraints, stakeholder feedback, and other project dependencies have been taken into consideration
Prioritize	Projects to be prioritized and included in the budget based on a feasibility assessment taking into consideration resources, time constraints, stakeholder feedback, priority score, and other project dependencies. Market projects are included in the stakeholder survey

Project Category

Project Category	Description
Enterprise	Includes internal-facing technology and back office support projects that have no market rule changes. This list includes projects that may be noticeable to Market Participants. These projects are NOT included in the stakeholder survey
Market	Projects associated with market rule(s) including market design and study projects as well as any project implementing market rule changes. These projects are included in the stakeholder survey unless they are Mandatory, Continuing, or Future

Project Scoring

Project Scoring	Description
NYISO Only	Enterprise projects that are not Mandatory, Continuing, or Future types are scored by the NYISO Only during the Prioritization phase. These projects are included in the budget based on a feasibility assessment taking into consideration resources, time constraints, priority score and other project dependencies.
Stakeholder Scored	Market projects that are not Mandatory, Continuing, or Future are included in the stakeholder survey and scored by the NYISO during the Prioritization phase. These projects are included in the budget based on a feasibility assessment taking into consideration resources, time constraints, stakeholder feedback, priority score, and other project dependencies.