

# 2023 Project Schedule Milestone Update

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**Shaun Johnson**

DIRECTOR, MARKET DESIGN

**Kevin Pytel**

SENIOR MANAGER, PRODUCT MANAGEMENT

**Budget and Priorities Working Group:**

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# Project Milestones & Status Definitions

# Project Types

Type	Definition
KP	Key project as identified in corporate incentive goal #6b
MP	Major project as identified in corporate incentive goal #6a
AP	Other approved project as identified in 2023 project budget
NP	New project to address emerging business needs

# 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.
<b>Projects with the following Milestones will generally be proposed as Continuing in future years, subject to Stakeholder input</b>	
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.

# Status Definitions

Status	Definition
<b>Complete</b>	Requirements for delivery have been satisfied.
<b>Delayed</b>	The project milestone may not be met by the targeted quarter, but the NYISO expects it will be met by the end of the year.
<b>At Risk</b>	The project is at risk for not meeting the project milestone by the end of the year.
<b>Not Started</b>	NYISO is not actively working on the project but expects the delivery can still be met based on scope of deliverable and time left to deliver.
<b>On Schedule</b>	Project is proceeding according to the project plan with expectations of meeting the required delivery by its target date.
<b>Critical</b>	The project is not projected to meet the project milestone by the end of the year.
<b>Reprioritized</b>	Project has been reprioritized; resources have been reallocated to address emerging business needs which may delay the delivery date to the next calendar year or beyond the date specified in corporate incentive goals.
<b>Cancelled</b>	Project has been cancelled; resources have been reallocated to other efforts and there are no plans to pursue this project any further.

# Design Projects

# 2023 Project Milestones

Project Name	Type	Qtr.	Project Commitment	Commitment Status
<b>Capacity Market Products</b>				
Demand Curve Reset	KP	Q3	Study Defined	<b>Complete</b>
Improving Capacity Accreditation (SOM)	KP	Q4	Deploy	<b>On Schedule</b>
LCR Optimizer Enhancements	MP	Q3	MDC	At Risk
CRIS Expiration Evaluation	AP	Q4	FRS	Complete
<b>New Resource Integration</b>				
Internal Controllable Lines	KP	Q4	MDC	On Schedule
Engaging the Demand Side	MP	Q4	ID	On Schedule
FERC Order 2222 Compliance	MP	Q4	MDCP	<b>Complete</b>
On-Boarding of New Resources	AP	Q4	Study Complete	On Schedule
Storage as Transmission	AP	Q4	ID	On Schedule

**Bold Red** text indicates status update since last presentation.

**Bold Blue** text indicates projects under stakeholder discussions through the end of Q3.

# 2023 Project Milestones

Project Name	Type	Qtr.	Project Commitment	Commitment Status
<b>Energy Market Products</b>				
<b>Dynamic Reserves (SOM)</b>	KP	Q3	MDC	At Risk
<b>Balancing Intermittency (SOM)</b>	KP	Q4	MDCP	<b>On Schedule</b>
Enhancing Fuel & Energy Security Refresh Study	MP	Q4	Study Complete	<b>Complete</b>
Long Mountain PAR Operating Protocol with ISO-NE	AP	Q4	MDC	<b>At Risk</b>
<b>Emissions Transparency</b>	MP	Q4	FRS	<b>On Schedule</b>
<b>Planning Products</b>				
Interconnection Process Enhancements	KP	Q4	MDC	<b>On Schedule</b>
Coordinated Grid Planning Process (CGPP) Support	MP	Q4	ID	On Schedule

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# Implementation Projects

# 2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Capacity Market Products</i>				
Modeling Improvements for Capacity Accreditation (SOM)	MP	Q4	FRS	At Risk
Market Validation, Reporting and Penalty Enhancements	AP	Q4	SDS	<b>Complete</b>
<i>New Resource</i>				
DER Participation Model	KP	Q3	Deploy	<b>At Risk</b>
Hybrid Aggregation Model	MP	Q3	SDS	Delayed
DER Operational Enhancements	AP	Q4	Deploy	At Risk

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# 2023 Project Milestones

Project Name	Type	Qtr.	Project Commitment	Commitment Status
<i>Business &amp; Finance Products</i>				
Credit Price Spread Updates Virtual & External Transactions	MP	Q2	Deploy	Complete
CMS and ConInvoice Data Integration	MP	Q4	Deploy	<b>Complete</b>
Meter Services System	MP	Q4	Deploy	On Schedule
Ongoing TCC Collateral Coverage Assessment Tool	AP	Q4	FRS	Complete
BSS and Billsim Upgrade	AP	Q4	Deploy	<b>At Risk</b>

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# 2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Enterprise Products</i>				
Network Infrastructure Upgrade	KP	Q4	Deploy	On Schedule
UPS Replacement	MP	Q3	Deploy	Complete
IT Infrastructure Automation	MP	Q4	Deploy	<b>Complete</b>
Application Platform Upgrade	MP	Q4	Deploy	On Schedule
Windows System Upgrade	MP	Q4	Deploy	On Schedule
Krey Control Room A/V Replacement	MP	Q4	Deploy	On Schedule
Microsoft 365	MP	Q4	Deploy	On Schedule
ITSM Security Enhancements	MP	Q4	Deploy	<b>Complete</b>

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# 2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Enterprise Products</i>				
Block Storage Refresh	MP	Q4	Deploy	On Schedule
Network Manager Cicso Refresh	MP	Q4	Dev. Complete	On Schedule
Modernizing ASIS	MP	Q4	Deploy	On Schedule
Access Management Platform Upgrade	MP	Q4	Deploy	<b>Complete</b>
Building Management System (BMS) Controls Upgrade	MP	Q4	Deploy	On Schedule
Database Upgrade	AP	Q4	Deploy	Complete
Smart Grid Upgrade	AP	Q4	Deploy	On Schedule
Next Gen Security Architecture	AP	Q4	Study Complete	<b>Complete</b>
OASIS Reliability Upgrade	AP	Q4	Study Complete	On Schedule

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# 2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<i>Energy Market Products</i>				
Constraint Specific Transmission Shortage Pricing (SOM)	MP	Q4	Deploy	On Schedule
Ambient Adjusted Transmission Lines Rating	MP	Q4	FRS	<b>Complete</b>
Emissions Transparency	MP	Q4	FRS	<b>On Schedule</b>
Evolving Financial Transaction Capabilities - Bilateral Transactions	MP	Q4	SDS	On Schedule
Secure Communication Channel with MPs	AP	Q4	Deploy	Critical

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# 2023 Project Milestones

Project Name	Type	Qtr	Project Commitment	Commitment Status
<b>Operations &amp; Reliability Products</b>				
EMS/BMS Operational Enhancements	MP	Q4	Deploy	Complete
OMS Enhancements	MP	Q4	Deploy	Complete
Contingency Analysis Results for TO Situational Awareness	AP	Q3	Deploy	Complete
<b>Planning Products</b>				
BTM Solar Demand Forecasting Product Enhancements	MP	Q4	Deploy	On Schedule
Demand Forecasting Operational Reporting Enhancements	MP	Q4	FRS	On Schedule
LFDR Upgrade and Enhancements	AP	Q4	Deploy	Critical
Generator Modeling Database Enhancements	AP	Q4	Deploy	On Schedule

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# Quarterly Priority Discussion



# Quarterly Discussion on Project Priorities

- **The NYISO encourages feedback from its stakeholders on project priorities and asks stakeholders to raise ideas or concerns as they arise**
  - This discussion can include any idea or concern and is not limited to just project discussions

# 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?