

Proposed 2025 Enterprise Projects

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Budget and Priorities Working Group

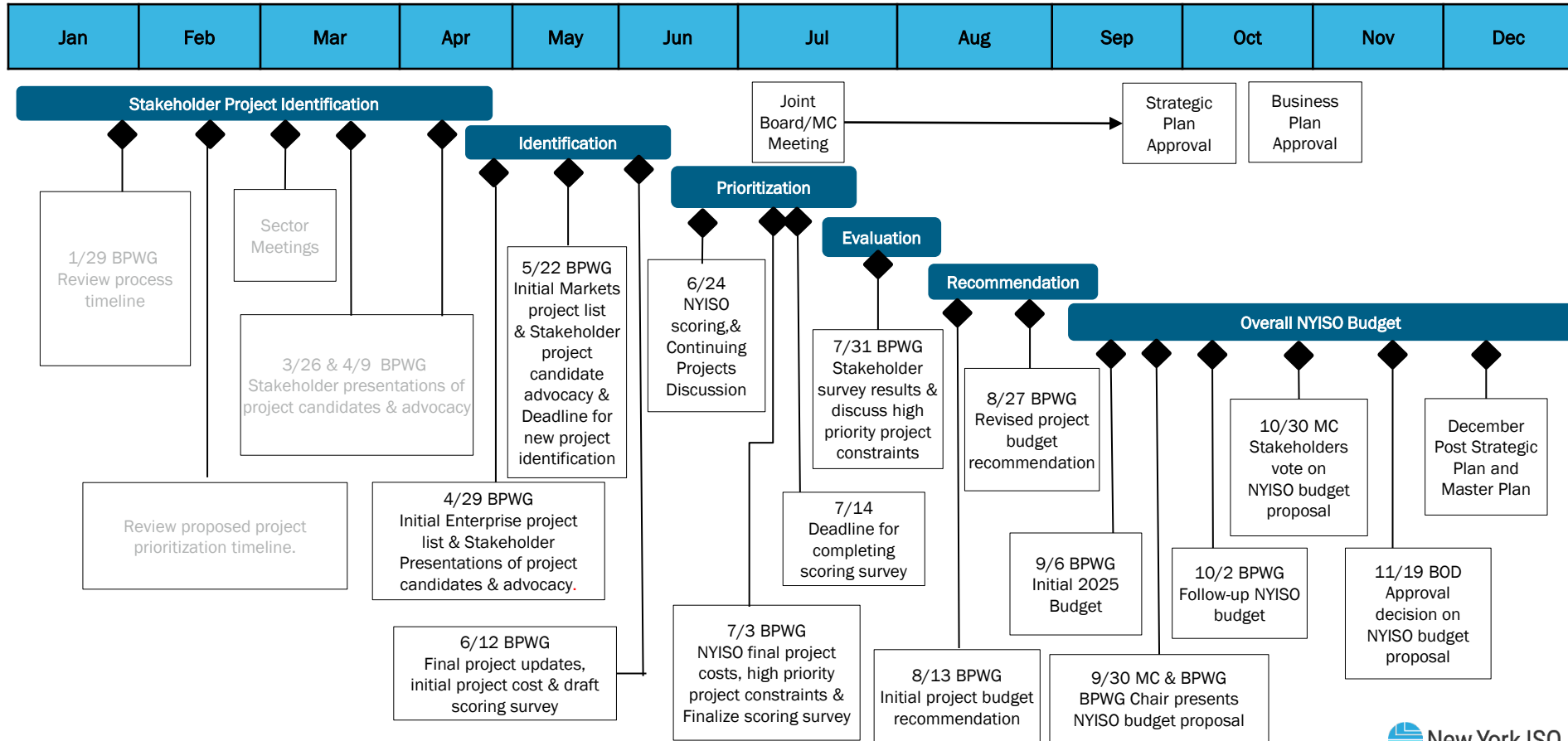
April 26, 2024, KCC

Agenda

- **Project Prioritization Timeline**
- **Project Descriptions**
- **2025 Enterprise Project Candidates**
- **Next Steps**

Project Prioritization Timeline

Project Prioritization Timeline



Project Descriptions

Project Descriptions

- **The NYISO has developed project descriptions for 60 proposed Enterprise projects**
 - 6 Business & Finance, 5 Capacity Market, 2 Energy Markets, 33 Enterprise, 0 New Resource, 4 Operations and Reliability, 10 Planning & 0 TCC Market
 - 4 Mandatory & 56 Prioritize
- **Last year, there were 54 proposed Enterprise projects at this time in the project prioritization process**
- **Project descriptions are included with today's posted meeting materials**

2025 Enterprise Project Candidates

Prioritize 2025 Enterprise Projects

Item	Project	Product Area	Project Type	2025 Proposed Deliverable	2024 Deliverable
1	3rd Floor Data Center Migration (Krey)	Enterprise	Prioritize	Deployment	Study Complete
2	Access Management Program Enhancements	Enterprise	Prioritize	Deployment	Deployment
3	Activu Server Upgrade	Enterprise	Prioritize	Deployment	
4	Air Handling Units Replacement (Krey)	Enterprise	Prioritize	Study Complete	
5	Anomaly Report Redesign	Business & Finance	Prioritize	Deployment	
6	Automation of DMNC Validation	Operations & Reliability	Prioritize	Deployment	Functional Requirements
7	Bidding Upload Download Security Enhancements	Enterprise	Prioritize	Deployment	Deployment

Prioritize 2025 Enterprise Projects

Item	Project	Product Area	Project Type	2025 Proposed Deliverable	2024 Deliverable
8	Building Management System Controls Upgrade	Enterprise	Prioritize	Deployment	Deployment
9	Conference Center Renovations (1D) (Krey)	Enterprise	Prioritize	Study Complete	
10	Conference Room Technology Upgrade	Enterprise	Prioritize	Deployment	
11	Contingency Database Enhancements Project	Planning	Prioritize	Study Complete	
12	Control Room Video Wall Replacement	Enterprise	Prioritize	Study Complete	
13	Control Room Logging Replacement	Operations & Reliability	Prioritize	Functional Requirements	Market Design Complete
14	Demand Forecasting Machine Learning	Enterprise	Prioritize	Study Complete	

Prioritize 2025 Enterprise Projects

Item	Project	Product Area	Project Type	2025 Proposed Deliverable	2024 Deliverable
15	EMS/BMS Operational Enhancements	Operations & Reliability	Prioritize	Deployment	Market Design Concept Proposed
16	EMS/BMS Technologies Upgrade	Operations & Reliability	Prioritize	Deployment	Market Design Concept Proposed
17	EMT Modeling Software Enhancements	Planning	Prioritize	Deployment	Deployment
18	Endpoint Protection Modernization	Enterprise	Prioritize	Deployment	
19	Enhanced Exterior Security Profile (Carmen)	Enterprise	Prioritize	Deployment	
20	Enhancements to Risk Verification Functionality	Business & Finance	Prioritize	Functional Requirements	
21	Enterprise Monitoring Redesign	Enterprise	Prioritize	Deployment	

Prioritize 2025 Enterprise Projects

Item	Project	Product Area	Project Type	2025 Proposed Deliverable	2024 Deliverable
22	Enterprise Project Collaboration	Enterprise	Prioritize	Study Complete	
23	Export Tool for EMS Offline Studies	Planning	Prioritize	Deployment	
24	Fire Alarm System Replacement	Enterprise	Prioritize	Deployment	
25	Hybrid Infrastructure Migration	Enterprise	Prioritize	Deployment	
26	ICAP AMS Improved System Integrations, Customer Transitions and Offers Project	Capacity Market	Prioritize	Software Design	Functional Requirements
27	ICAP Auction Simulator Enhancements	Capacity Market	Prioritize	Functional Requirements	
28	ICAP Supplier Status Enhancements	Capacity Market	Prioritize	Functional Requirements	

Prioritize 2025 Enterprise Projects

Item	Project	Product Area	Project Type	2025 Proposed Deliverable	2024 Deliverable
29	IT Infrastructure Automation	Enterprise	Prioritize	Deployment	
30	LDAP Upgrade	Enterprise	Prioritize	Deployment	Deployment
31	Liferay Web Content Management System Upgrade	Enterprise	Prioritize	Deployment	
32	Load Forecasting System Upgrade and Build Out	Planning	Prioritize	Deployment	
33	Media and Podcast Rooms	Enterprise	Prioritize	Study Complete	
34	Micro-segmentation	Enterprise	Prioritize	Deployment	Deployment
35	Microsoft 365	Enterprise	Prioritize	Deployment	Deployment

Prioritize 2025 Enterprise Projects

Item	Project	Product Area	Project Type	2025 Proposed Deliverable	2024 Deliverable
36	Midrange and Storage Upgrade	Enterprise	Prioritize	Deployment	Study Complete
37	NAS Storage Refresh	Enterprise	Prioritize	Deployment	
38	Network Infrastructure Upgrade	Enterprise	Prioritize	Deployment	Deployment
39	New Ties and Gens Management	Business & Finance	Prioritize	Functional Requirements	
40	Office Mechanical Systems (Krey)	Enterprise	Prioritize	Deployment	Deployment
41	Oracle Database Evolution	Enterprise	Prioritize	Study Complete	
42	Outage States Portal Dashboard	Capacity Market	Prioritize	Functional Requirements	

Prioritize 2025 Enterprise Projects

Item	Project	Product Area	Project Type	2025 Proposed Deliverable	2024 Deliverable
43	Enhancements to Natural Gas Notices	Planning	Prioritize	Deployment	
44	Probabalistic Forecasting Enhancements	Planning	Prioritize	Functional Requirements	
45	Production Cost Software Upgrade	Planning	Prioritize	Development Complete	Software Design
46	Quarterly Project Status Enhancements	Planning	Prioritize	Deployment	
47	Renewable Energy Forecast Integration and Reporting Enhs	Planning	Prioritize	Functional Requirements	Issue Discovery
48	Replacement of AC Units in 2nd Floor Data Center	Enterprise	Prioritize	Study Complete	
49	Salesforce Migration to Flow	Enterprise	Prioritize	Deployment	

Prioritize 2025 Enterprise Projects

Item	Project	Product Area	Project Type	2025 Proposed Deliverable	2024 Deliverable
50	Security Information and Event Management (SIEM) Modernization	Enterprise	Prioritize	Deployment	
51	SQL Server Monitoring Tool	Enterprise	Prioritize	Deployment	
52	Telemetry Tone Gear Upgrade	Enterprise	Prioritize	Deployment	Deployment
53	Thunderstorm Alert	Business & Finance	Prioritize	Functional Requirements	
54	Uncertainty Response Team (URT)	Planning	Prioritize	Functional Requirements	
55	Watchlist for Rest of State Units	Energy Market	Prioritize	Deployment	Deployment
56	Windows & SQL Upgrade	Enterprise	Prioritize	Deployment	

Mandatory 2025 Enterprise Projects

Item	Project	Product Area	Project Type	2025 Proposed Deliverable	2024 Deliverable
57	Automation in CMS for Interconnection Credit Instruments	Business & Finance	Mandatory	Development Complete	
58	Generator Data Reporting System	Capacity Market	Mandatory	Deployment	Study Complete
59	Modification to NERC CIP Standards (Virtualization)	Enterprise	Mandatory	Study Complete	
60	SDX Replacement	Business & Finance	Mandatory	Deployment	Deployment

Next Steps

Next Steps

- **Written feedback on project descriptions and project type categorization may be provided by May 1st for incorporation into May 22nd presentation**
 - Kevin Pytel (kpytel@nyiso.com) or Shaun Johnson (sjohnson@nyiso.com). You may also call them at 518-428-9528 and 518-774-3959, respectively.
- **May 22nd BPWG is the deadline for stakeholders to identify new projects and still have them included in the scoring survey**
- **Proposed 2025 Market projects to be reviewed at the May 22nd BPWG along with any updates to proposed Enterprise projects**
- **Stakeholder advocacy and draft scoring survey are scheduled for the June 12th 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 or MC to define further action on the proposal.
Architectural Design	The architectural design document is complete and software development is ready to begin.
Market Projects with the following Milestones will generally be proposed as Continuing in future years, subject to Stakeholder input.	
Functional Requirements	NYISO has completed documentation of the functional requirements, and the Business Owner has approved.
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 Functional Requirements, 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. No Enterprise Projects will be Continuing.
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.