



## **Item 8.3: 2019 Major Projects Update**

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Director, PMO

Board of Directors Meeting

ERCOT Public  
February 12, 2019

# Agenda

**1**

**2018  
Project  
Delivery**

**2**

**2019  
Planned  
Project  
Delivery**

**3**

**2018  
Major  
Project  
Updates**

**4**

**2019  
Major  
Project  
Highlights**

# 2018 Project Delivery

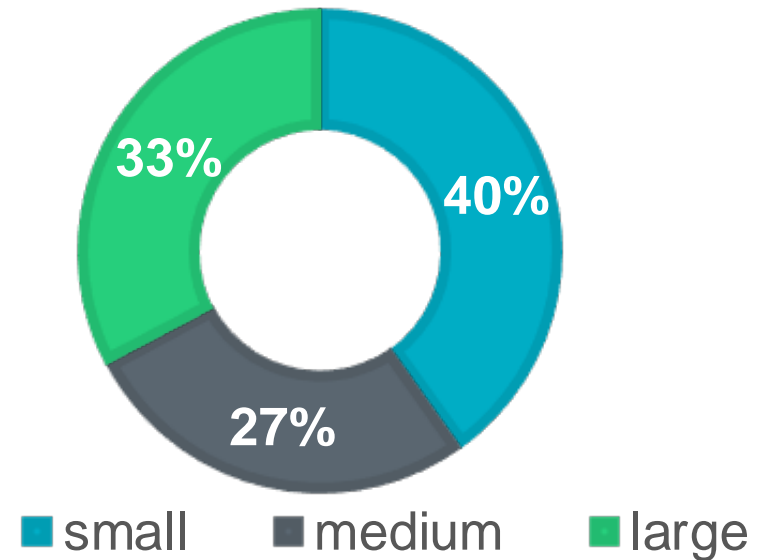
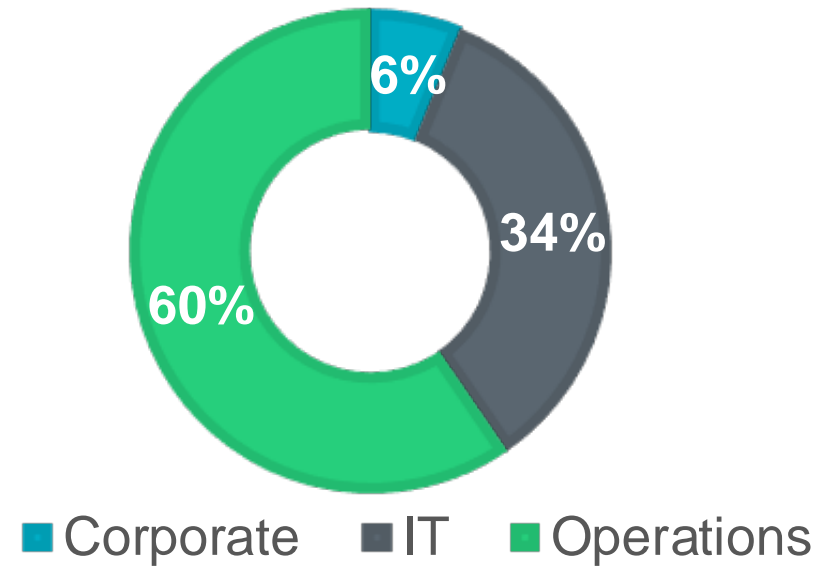
**\$39m** project spend  
(includes DC4 & training facility)

**150** unique projects  
active in 2018

**83** average #  
active projects

**79** projects completed

Data as of 1/21/2018



# 2019 Planned Project Delivery

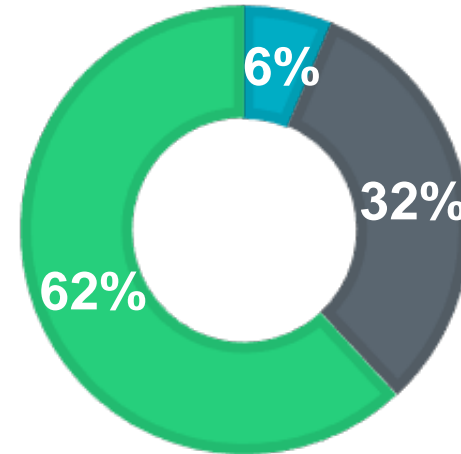
**\$20m** project budget  
(includes DC4)

**\$10m** forecasted for the  
major projects

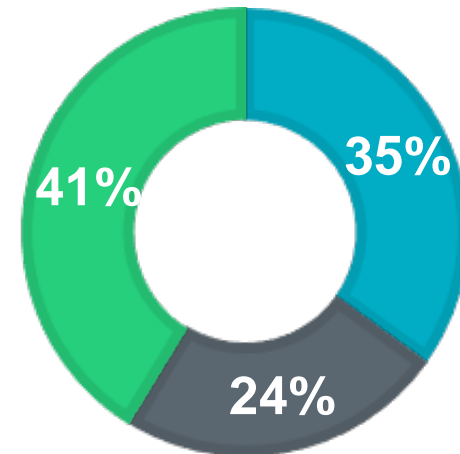
**113** expected projects

**63** current active  
projects

*Data as of 1/21/2018*



■ Corporate ■ IT ■ Operations



■ small ■ medium ■ large

# 2018 Major Project Updates

**Congestion  
Revenue Rights  
Upgrade**

*Delivered*

**IT Change  
& Configuration  
Management**

*Delivered*

**Training Facility**

*Delivered*

**Credit Monitoring  
& Management  
Refresh**

*In Flight*

**Identity & Access  
Management**

*In Flight*

**Data Center  
Refresh**

*In Flight*



# Credit Monitoring & Management System

## BENEFITS

**Risk:** supported platforms, modern architecture, enhanced security

**Efficiency:** maintenance and software support, elimination of unused elements and unnecessary complexity, process automation, improved user interfaces, market efficiencies (NPRRs)

## PROJECT OVERVIEW

Improve the ability to support and maintain the Credit Monitoring & Management (CMM) system by upgrading the technology and replacing vendor application components. Combines several CMM NPRRs, a technical refresh and new functionality into a single project to gain efficiencies.

- Phase 1A: NPRRs 648, 683, 743, 760, and 800 on current platform
- Phase 1B: Modern architecture, various user improvements, & NPRRs 519, 620, 660, 741, 755

## DETAILS

**Go-Live:** June 2019

**Total Budget:** \$5.1M

**2019 Budget:** \$1M



# Identity & Access Management

## BENEFITS

**Risk:** supported platform, modern architecture, enhanced security, improved data integrity, and improved operational awareness

**Efficiency:** simplified, streamlined, user-friendly process and tools

## PROJECT OVERVIEW

Replace current Identity Management system with new Identity Management system, following best practices for a centralized repository for all identities, account lifecycle management, provisioning, de-provisioning, auditing, certification and monitoring, Single Sign On, and Federation capabilities allowing for quick connectivity to external applications.

## DETAILS

**Go-Live:** June 2019

**Total Budget:** \$7.5M

**2019 Budget:** \$1.9M



# Data Center Refresh (DC4)

## BENEFITS

**Risk:** supported platforms, modern architecture, enhanced redundancy, enhanced security

**Efficiency:** maintenance and software support, improved user interfaces

**Performance:** improved performance in data processing

## PROJECT OVERVIEW

Support reliability through replacement of aging technology that is approaching end-of-life and support (network, telecommunications, servers and storage).

## DETAILS

**Go-Live:** December 2019

**Total Budget:** \$48M

**2019 Budget:** \$3.3M





# 2019 Major Project Highlights

**Resource Asset  
Registration Form  
Replacement**

*In Flight*

**Retail Portfolio  
Refresh**

*In Flight*

**Market Mgmt. System  
/ Outage Scheduler  
Upgrade**

*Not Started*

# Resource Asset Registration Form Replacement

## BENEFITS

**Risk:** reduction of manual processes, improved transparency and access to data and data validation

**Efficiency:** streamlining submittal and validation processes, improved usability and integrated explanation of data and its purpose

## PROJECT OVERVIEW

Replace the current Resource Asset Registration Form (RARF) spreadsheet with an online solution that enables Market Participants to electronically submit, review, and make changes to resource asset and network modeling data.

## DETAILS

**Go-Live:** Target Go-Live date to be set in Q1

**Total Budget:** \$1.8M

**2019 Budget:** \$1M



# Retail Portfolio Refresh

## BENEFITS

**Risk:** improved reliability and uptime, supported platforms, modern architecture, enhanced security

**Efficiency:** maintenance and software support

## PROJECT OVERVIEW

Improve support and maintenance capability for the Retail systems by upgrading or replacing aging retail system products and platforms. The program governs multiple projects delivering the technical foundation changes. The retail portfolio of products supports the following services:

- Flight Certification
- EDI Mapping and Translation (TXSET)
- Internal Monitoring and PUC Reporting
- NAESB Data Transport
- Registration, Transaction Processing & Dispute Resolution
- Retail Market Issue Resolution

## PROJECT DETAILS

Program planning addresses upgrade project sequence and timing.

### ERCOT Flight Certification Website

**Go-Live:** June 2019

**Total Budget:** \$865K

**2019 Budget:** \$55K

### EDI Map & Translator Replacement

**Go-Live:** TBD 2021

**Total Budget:** \$2.1M

**2019 Budget:** \$1.2M



# Market Management System / Outage Scheduler Upgrade

## BENEFITS

**Risk:** supported platforms, modern architecture, enhanced security

**Efficiency:** vendor maintenance and software support

## PROJECT OVERVIEW

Support reliability of the Market Management and the Outage Scheduler Systems through replacement of aging technology that is approaching end-of-life and support.

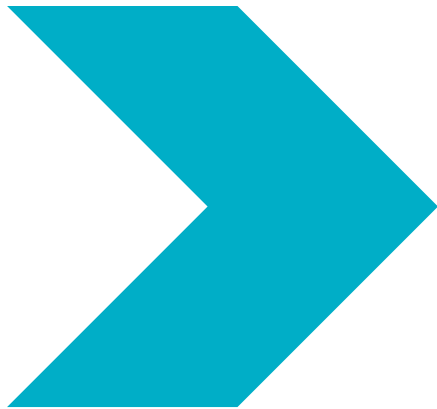
## DETAILS

**Go-Live:** TBD 2020 (not started)

**Total Budget:** \$3M

**2019 Budget:** \$1M





## **ONGOING UPDATES**

Board of Directors Meetings (All)

Credit Working Group Meetings (CMM)

Resource Integration Workshops (RARF)

Retail Market Subcommittee Meetings (Retail Portfolio)