



## **Item 5.1: Technology OKR Projects Update**

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Senior Vice President, Chief Administrative Officer, and Chief of Staff

Technology and Security Committee Meeting

ERCOT Public

October 16, 2023

# Overview

- **Purpose**
  - Provide update on project delivery and semi-annual portfolio statistics
- **Voting Items / Requests**
  - No action is requested of the Technology and Security (T&S) Committee or Board; for discussion only
- **Key Takeaways**
  - 2023 OKR projects remain on budget and schedule
  - Major projects are being given high priority

# 2023 OKR Projects Stoplight

Status	Project	Update
●	Energy Management System (EMS) Upgrade	<ul style="list-style-type: none"> <li>• On track – EMS Upgrade go-live in November 2023</li> <li>• Met – completion of integration testing in July 2023</li> <li>• Met – completion of Operating Day testing in September 2023</li> <li>• Met – Start Closed Loop testing in September 2023</li> <li>• Cutover of ICCP servers for TSP and QSE data in September 2023</li> <li>• Limited test periods using upgraded EMS in production in October/November 2023</li> <li>• Final test period transition to Go-Live in November 2023</li> <li>• EMS code freeze for non-emergency changes</li> <li>• Market discussion of technical impacts at TWG</li> </ul>
●	DC5 Infrastructure Refresh Program	<ul style="list-style-type: none"> <li>• On track – Procure and install key components of the aging data center infrastructure for the DC5 Infrastructure Refresh</li> <li>• Met - targets set for server migrations, backup migrations, network firewall refresh</li> <li>• On track – 50% target for database migrations by end of 2023</li> <li>• Other DC5 Program activity meeting schedules and budget</li> </ul>
●	Treasury Management System Implementation	<ul style="list-style-type: none"> <li>• On track – Implement key milestones to reduce treasury operational complexities</li> <li>• Met - Complete planning for full integration solution in August 2023</li> <li>• Initial release in July 2023</li> <li>• Remaining release targets in January and April of 2024</li> </ul>
●	RTC + B Program	<ul style="list-style-type: none"> <li>• Met – Start all RTC+B sub-projects by end of September 2023</li> <li>• On Track - MMS Business and Interface Requirements for MMS vendor by end of year</li> <li>• Mitigating subject matter expert constraints</li> </ul>

**Key Takeaway:** All 2023 OKR projects remain on budget and schedule



# Major Projects

2023				2024				2025				2026			
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
EMS Upgrade															
ECRS (NPRR863)															
				Interim State of Charge (NPRR1186)											
				Dispatchable Reliability Reserve Service (DRRS) (NPRR1203)											
				PCM (Performance Credit Mechanism) Concept and Protocol Development								PCM Implementation (project timeline TBD)			
				RTC+B (Real-Time Co-optimization + Batteries) (NPRR1007-NPRR1014, and RTC-SOC NPRR)								[2026 go-live date TBD]			

★ Actual Go-live

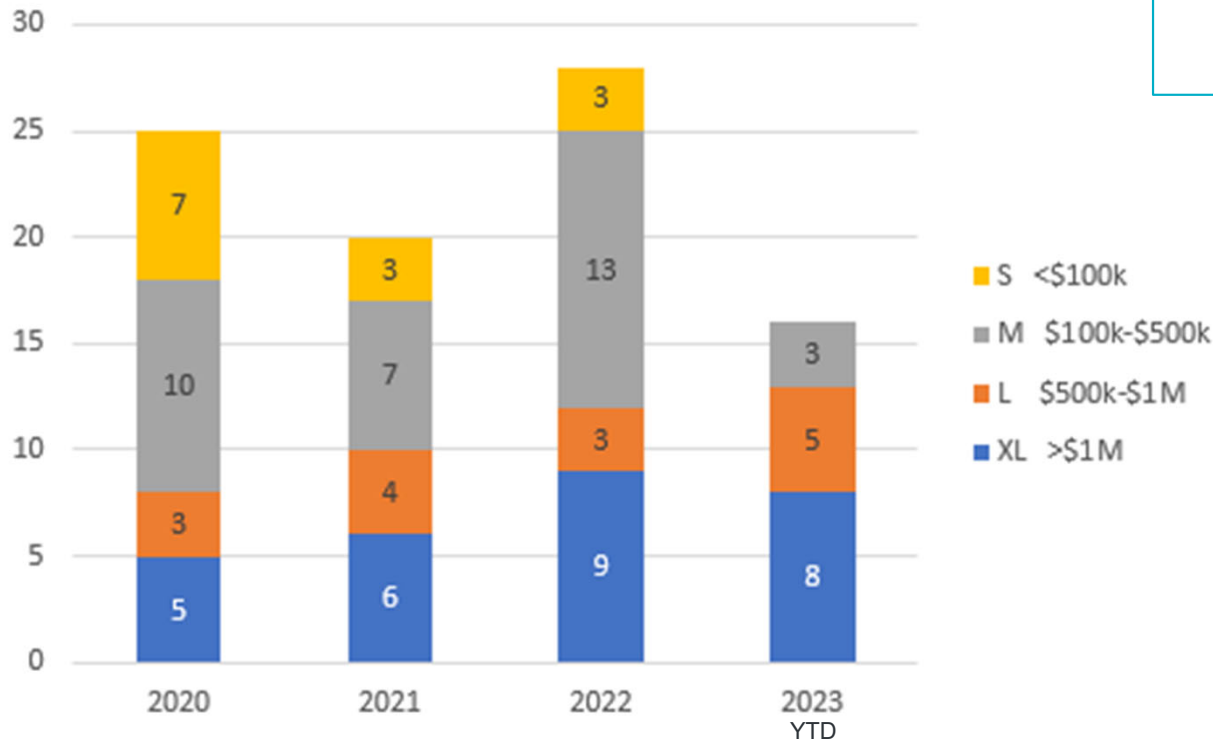
★ Target Go-live

- Several major projects are in-flight at this time
  - ECRS is complete
  - EMS Upgrade is nearing completion
  - Interim State of Charge (NPRR1186) and DRRS (NPRR1203) are getting underway
  - RTC+B has restarted with a 2026 go-live target
  - PCM concept discussions to start soon

**Key Takeaway:** Priority is given to these projects when managing resource constraints

# Project Statistics

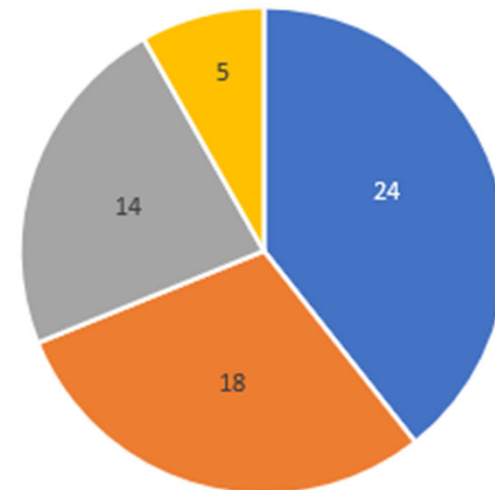
Project Go-Lives by Budget Range



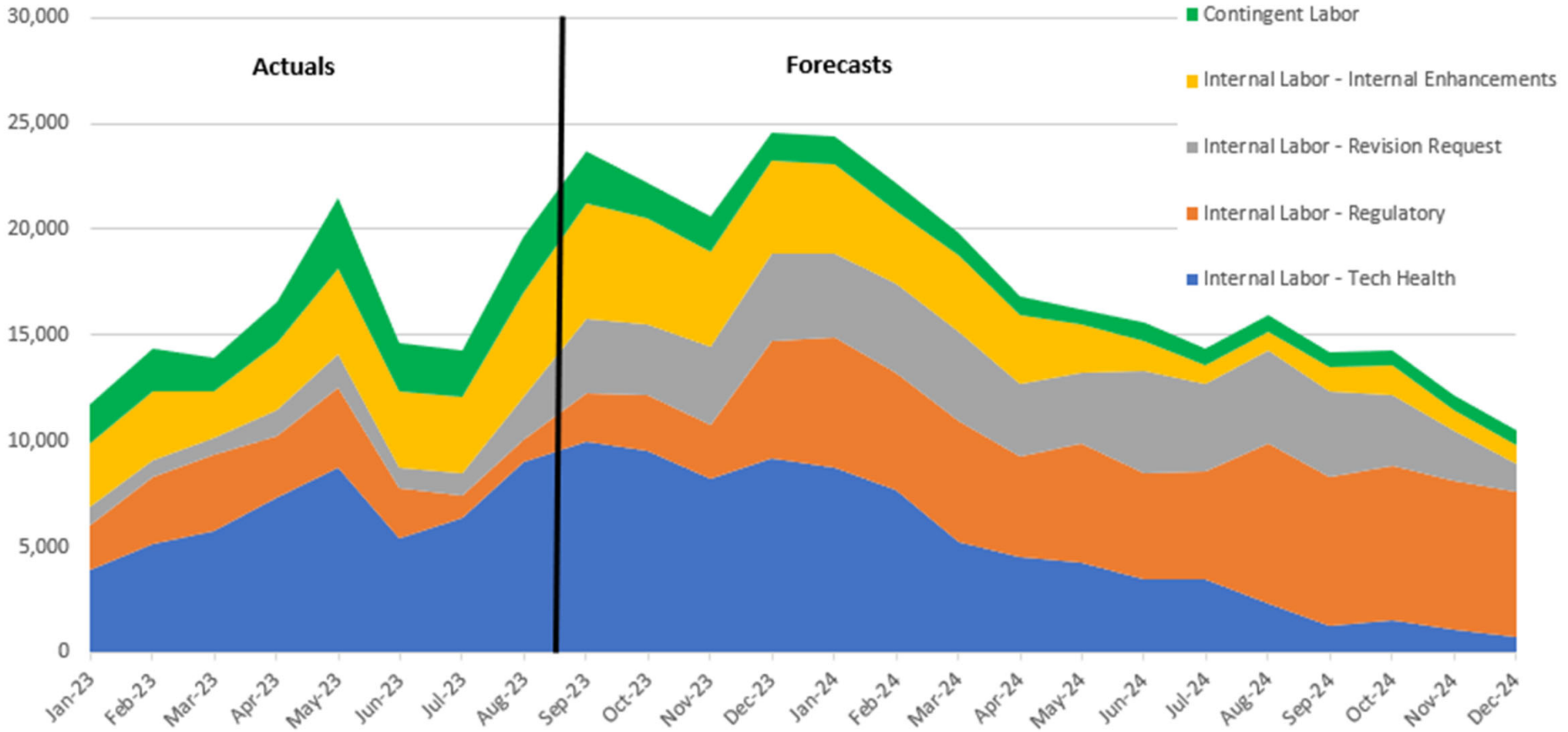
15 additional projects scheduled to go-live before year-end

**Key Takeaway:** Project delivery keeping pace with increasing project demands

61 Active Projects



# Project Labor Hours – 2023/2024



**Key Takeaway:** Labor is ramping up with numerous critical projects in flight

