



Item 5.1: Projects and Technology Update

Jayapal Parakkuth

Sr Vice President and Chief Information Officer

Technology and Security Committee Meeting

ERCOT Public

Aug 19, 2024

Highlights

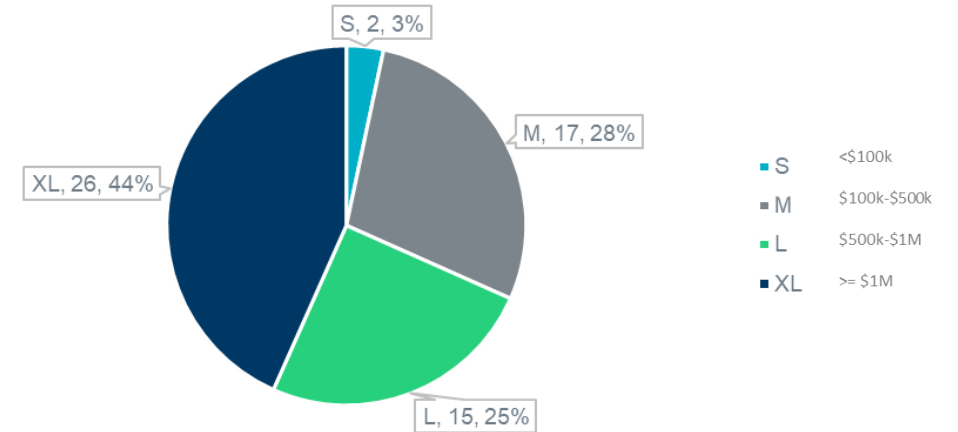
- Our projects are generally on track with normal Project Ups & downs.
- Retail Technology project – TXSET 5.0

Key Takeaway: Continuing to maintain the tech health and do enhancements to our systems.

2024 Project Delivery

	Apr	June	Aug
YTD Projects Started	11	21	32
YTD Projects Finished	11	20	29
YTD Count of Projects Worked	69	79	90
Number of Active Projects	58	59	60
Total of Active Project Budgets	\$128M	\$142M	\$132M

Project Volume by Budget Category

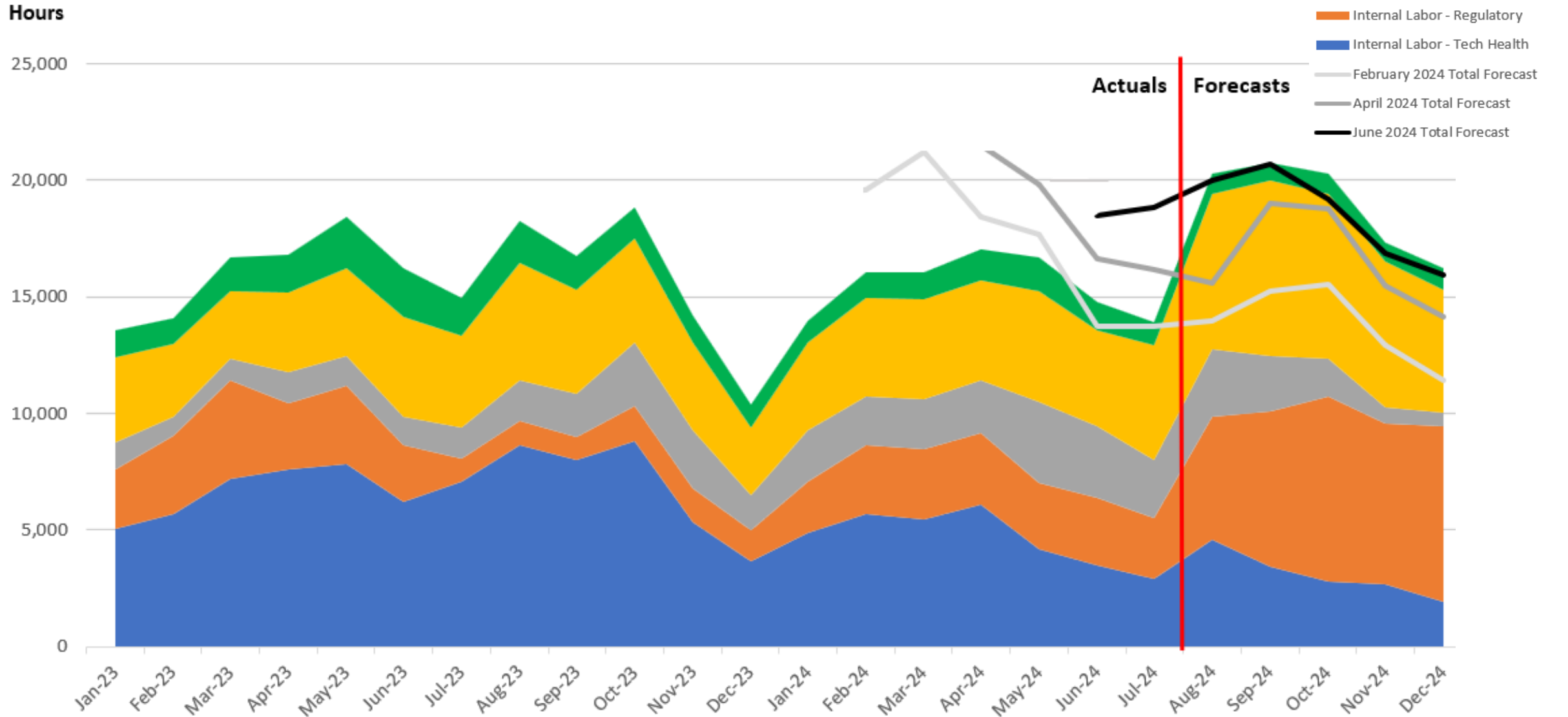


Active Project Estimate at Complete	LTD Actuals a/o Apr BOD	LTD Actuals a/o Jun BOD	LTD Actuals a/o Aug BOD	Forecast a/o Apr BOD	Forecast a/o Jun BOD	Forecast a/o Aug BOD
Internal Labor	17.6M	20.5M	15.8	30.0M	30.8M	29.2
Contract Labor	4.3M	4.3M	1.3	1.3M	0.9M	2.1
Vendor	12.4M	13.5M	7.1	6.8M	8.7M	11.8
H/W, S/W	22.1M	18.2M	20.6	25.7M	37.2M	33.0
Other	2.4M	2.5M	0.6	4.5M	2.6M	2.8
Total	59.0M	59.1M	45.3	68.4M	80.1M	78.8



Key Takeaway: We are managing a healthy volume of projects with no issues to report

Project Labor Hours – 2023/2024



Key Takeaway: Beginning to see Ramp-Up as summer school break ends



ERCOT Application Release this cycle

Application Release R7 (July),R8 (August)

- PR373-01 - Forecast Presentation Platform (FPP) - Reports and Public API
- PR458-01 – External Load Forecast
- PR456-01 - RIOO-IS_RS ESR-Single Model & ESR Validation Rules Update
- PR473-01 - Automatic tracing and unit tests
- PR451-01 – NPRR1149, NPRR1121, NPRR1090, NPRR962
- PR476-01 – NPRR1131 NPRR1058 ODBR040 Controllable Load Resource Participation in Non-Spin

Key Takeaway: Continuing to maintain the tech health and do enhancements to our systems.

Upcoming Retail Project Delivery – Texas SET v5.0

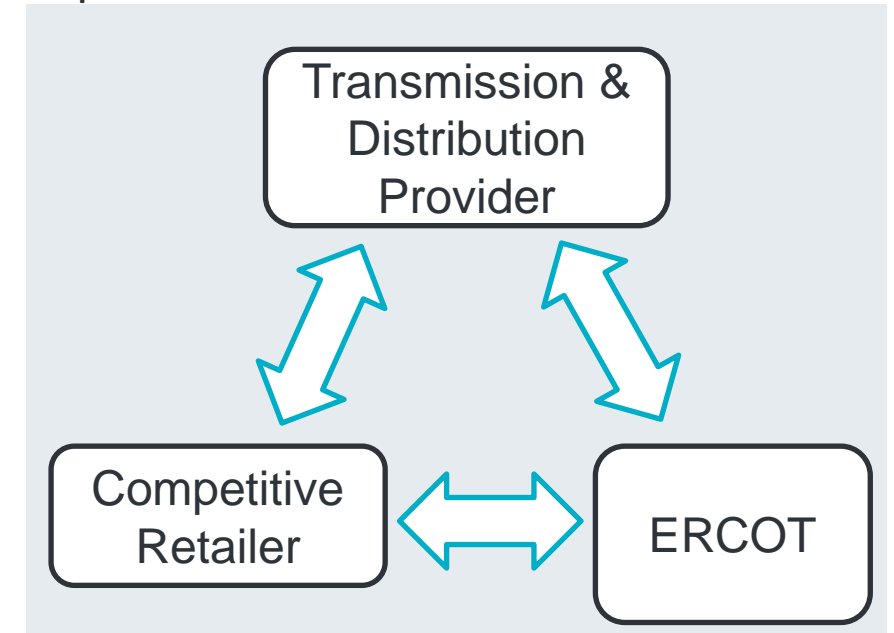
Texas Standard Electronic Transaction (TX SET) Version 5 Retail Market enhancements:

- Upgrades to Continuous Service Agreement logic to increase usability and efficiency
- Inclusion of County and Metered Service Characteristics and Reject options that expand routing and reporting
- Automated manual processes associated with inadvertent customer gains and customer's right of rescission
- Mandatory 'Flight' testing to begin 8/6 on new standards to validate Market Participant compliance
- Go-live Target: Nov 2024

Examples of Retail Transactions:

- Move-Out
- Move-In
- Switch

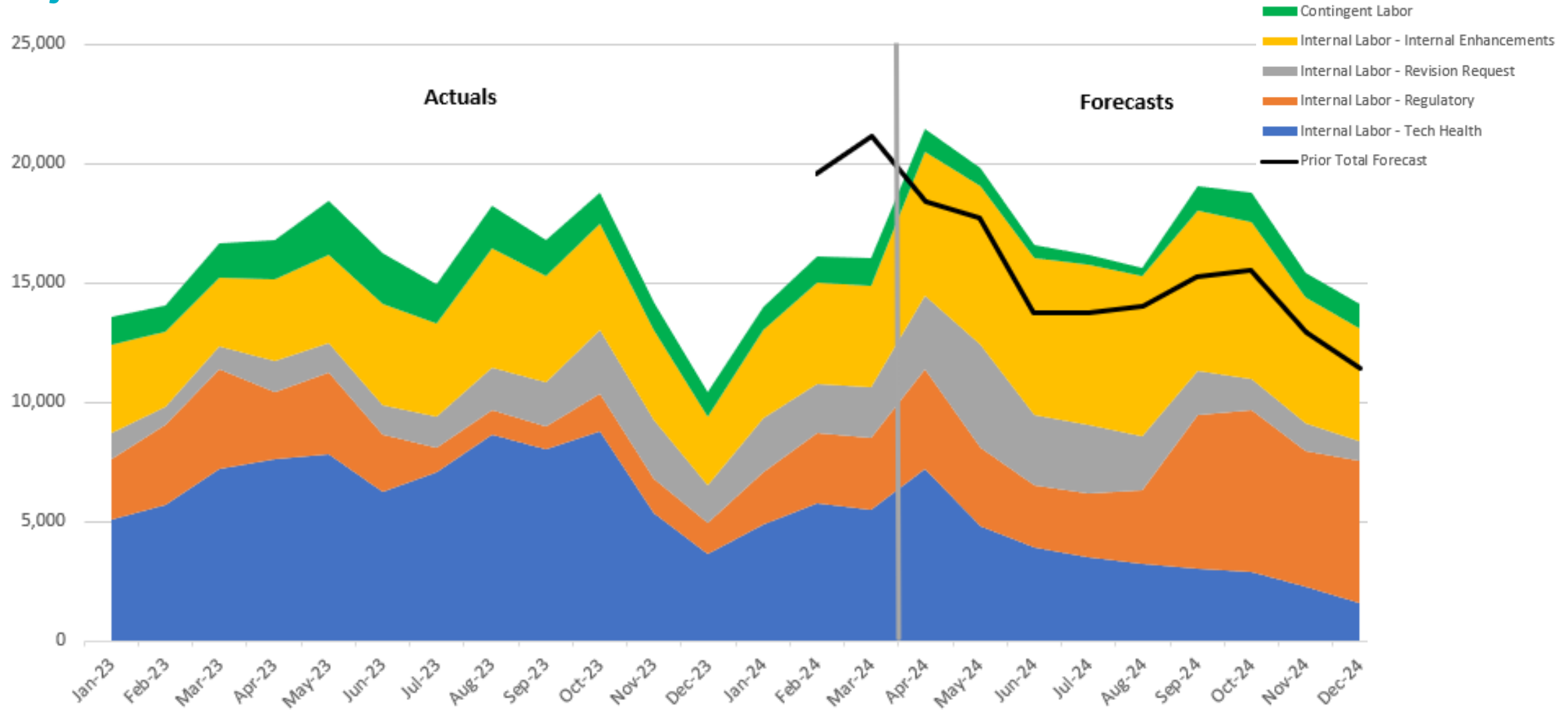
Impacted Entities:



Key Takeaway: Changes to Retail Systems impacting all Retail Market Participants in Nov 2024

Appendix

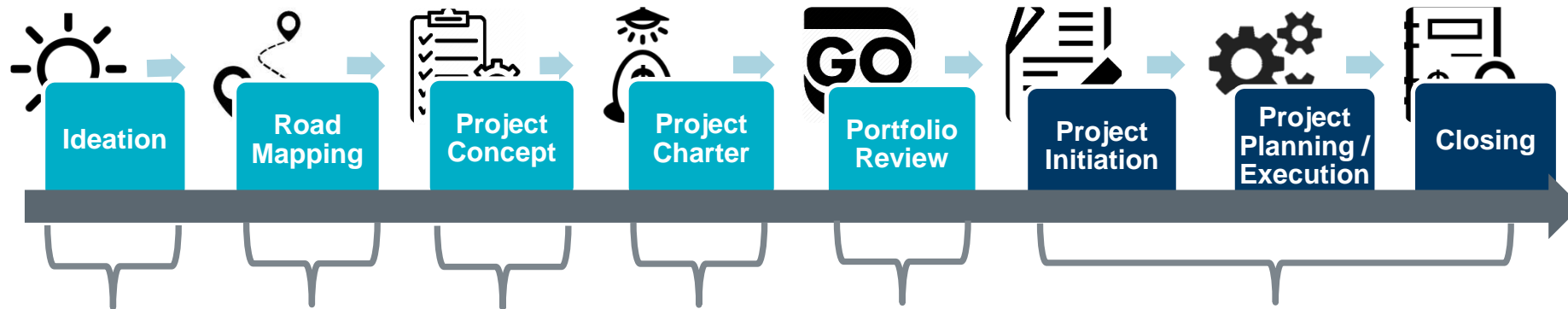
Project Labor Hours – 2023/2024



Key Takeaway: We have ramped up this Quarter and will continue to Summer



ERCOT's Project Portfolio Process



- Initial idea development

- Determine proposed timing & prioritization
- Road Map Dashboard

- Development of objective, background, strategic alignment, benefits, scope & risks

- Develop the Impact Analysis, resource & system impacts, high level requirements

- Resource analysis
- Executive prioritization
- Approval to proceed (projects with priority and clear resources)

- Official project initiation by the Project Management Office (PMO)
- Project Phases
 - Initiation
 - Planning
 - Execution (includes Go-Live)
 - Closing
- Operational Support hand-off
- Lessons Learned