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| SCR Number | 786 | SCR Title | Retail Market Test Environment |
| Date Posted | | June 10, 2015 | |
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| Requested Resolution | | Normal | |
| Supporting Protocol or Guide Section(s)  (If applicable) | | Retail Market Guide Section 7.11.3.1, Flight Testing Submission of Customer Billing Contact Information  Retail Market Guide Section 7.15.1, Ad Hoc Connectivity Test of Advanced Metering System Interval Data | |
| Other Document Reference/Source | |  | |
| System Change Description | | This System Change Request (SCR) instructs ERCOT to develop a new retail market test environment, in addition to the current Certification (CERT) environment, that mimics the production environment functionality. This new retail market testing environment will provide flexibility and availability for ad-hoc testing requests by Market Participants and will reduce the overall risk to the retail, market by allowing Market Participants to fully test internal projects before going live in production. | |
| Reason for Revision | | Addresses current operational issues.  Meets Strategic goals (tied to the [ERCOT Strategic Plan](http://www.ercot.com/content/news/presentations/2013/ERCOT%20Strat%20Plan%20FINAL%20112213.pdf) or directed by the ERCOT Board).  Market efficiencies or enhancements  Administrative  Regulatory requirements  Other: (explain)  *(please select all that apply)* | |

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| **Business Case** | |
| **Qualitative Benefits** | * Allows for the retail Market Participants to independently test various market processes independent of the current CERT testing environment * Reduces potential negative customer impact and/or Market Participant risks by testing changed or new business processes before implementation * Provides flexibility and availability for any ad hoc testing needs for retail Market Participants that is not contingent upon the current CERT testing environment blackout periods * Eliminates the need for simulation date to test transactions * Eliminates the need for sending duplicate transactions multiple times * Requires minimal manual intervention of transaction processing * Allows ERCOT systems to simulate retail transactions thereby eliminating the need for additional retail Market Participants to be involved in additional ad hoc testing * Allows retail systems in addition to Texas Standard Electronic Transaction (TX SET) and North American Energy Standards Board (NAESB) to be certified for new releases * Could potentially be leveraged to support certain retail market training scenarios * Would allow testing of initial Web Service Definition Language (WSDL) to expose Application Program Interface (API) errors * Would allow a final API WSDL to be provided at earliest date possible |
| **Quantitative Benefits** | Based on prior experience with various market projects both ERCOT and Market Participants estimate savings as detailed below:   * Estimated that the new testing environment would save eight man hours per retail Market Participant per market project. * A more stable testing environment will reduce the testing duration by 80%. * Reduces unexpected cost of issues that are identified post implementation. * Reduces or eliminates risk to the market by providing a robust testing environment accessible for Market Participants to test internal projects with ERCOT prior to going live in production. |
| **Impact to Market Segments** |  |
| **Other** |  |

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| Market Segment | Investor Owned Utility (IOU) |

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| Business Case for Proposed System Change  [Please provide sufficient detail] |

**Issue:**

The Certification (CERT) environment was originally created and is currently used for Market Flight testing to certify Market Participants in ERCOT retail market.

Our investigation into current CERT environment capabilities revealed that it does not meet retail market testing needs. Some of the challenges found during the course of our investigation are:

1. Insufficient for market volume testing and Application Program Interface (API) testing.
2. Currently the test scenario uses a Simulated (SIM) date. This makes it difficult to perform ad hoc testing in CERT.
3. Restricted availability for additional ad hoc testing outside CERT environment schedules.
4. Data is purged after every testing cycle resulting in resending of same data.
5. Manual intervention required for validating transaction data set.
6. Current environment unable to simulate Transmission and/or Distribution Service Provider (TDSP)/ Competitive Retailer (CR) transactions resulting multi party coordination for testing.

**Resolution:**

Due to the retail market’s evolution, there is a need for a market facing test environment that provides expanded functionality that is not currently supported by CERT environment. A fully robust testing environment will provide flexibility and availability for any ad hoc testing requests by Market Participants. This new testing environment would operate on its own unique release calendar and Service Level Agreements (SLAs).

Expanded functionality to match ERCOT production environment capabilities for the following:

1. Improving overall testing capabilities in all the retail business processes.
2. Eliminating the need for SIM date to test transactions.
3. Allowing existing Market Participants more flexibility to perform various adhoc testing during Monday to Friday (8:00 am – 5:00 pm).
4. Data is purged only on agreed upon schedule eliminating the need for sending the same transactions multiple times.
5. Transactions are processed through ERCOT systems with minimal manual intervention resulting in faster turn around time.
6. ERCOT systems are able to simulate TDSP/CR transactions.

**Benefits:**

1. This environment will allow retail Market Participants to perform testing independent of certification flight schedules. Specifically, this new environment will be used to test the following business functional processes:
   1. TX SET Electronic Data Interchange (EDI) Transactions.
      1. Market Participants will have the ability to send individual as well as batched transactions.
      2. Market Participants will have the ability to test in isolation since the new environment will be providing the faciltity to mimic a TDSP or a CR.
   2. Ability to test MarkeTrak API and Graphical User Interface (GUI).
      1. Market Participants will be able to test MarkeTrak API and GUI in more robust environment.
      2. Market Participants will have the ability to performance test MarkeTrak API.
   3. Non-EDI transactions.
      1. Market Participants will have the ability to send and receive non-EDI transactions like Customer Billing Contact Information, Demand Response, Loads in Security-Constrained Economic Dispatch (SCED) and Load Serving Entity (LSE).
   4. Browser Compatability Support.
      1. Market Participants will have the ability to test applications with upgraded version of browser in specific configurations.
   5. Ability to test NAESB Electronic Delivery Mechanism (EDM) modifications and future version upgrades.
2. The quantative benefits of the new Retail Testing environment:
   1. Estimated that the new testing environment would save eight man hours per retail Market Participant per market project.
   2. A more stable testing environment will reduce the testing duration by 80%.
   3. Reduces unexpected cost of issues that are identified post implementation.
   4. Reduces or eliminates risk to the market by providing a robust testing environment accessible for Market Participants to test internal projects with ERCOT prior to going live in production.