**SCR786 Retail Market Test Environment Sandbox Functionality User Orientation**

1. **SCR786 Background**

The Retail Market Test Environment allows Retail Market Participant to perform testing independent of ERCOT Flight testing within the ERCOT Certification environment (CERT) prior to go-live in Production (PROD). This environment can be used to test the following business functional processes, but not limited to:

TXSET EDI Transactions:

Market Participants can send individual, as well as batched, TXSET transactions in isolation within an environment that mimics ERCOT PROD.

MarkeTrak GUI/API:

Market Participants can test MarkeTrak GUI and API performance and functionality within an environment that mimics ERCOT PROD.

Non-EDI transactions:

Market Participants can test non-EDI transactions such as Customer Billing & Contact Information (CBCI) files, Demand Response files, Loads in SCED and .LSE files.

ERCOT will only perform File level validations, but will not perform Business level validations. (Example:CBCI file would only receive file validation for File 2A MTCRCustomerInformationERCOTResponse.csv and not the ESID validation File 2B MTCRDataValidationERCOTResponse.csv) [Reference: RMG section 9 Appendix F6: Customer Billing Contact Information]

Browser Compatibility Support:

Market Participants can test applications with upgraded browser versions in specific configurations.

NAESB EDM Support:

Market Participants can test NAESB Electronic Delivery Mechanism (EDM) modifications and future version upgrades.

1. **Prerequisites for Sandbox Testing**
2. Market Participants must be certified in the Texas Retail Market .
3. Market Participants must have coordinated with their service provider, if applicable, before beginning sandbox testing.
4. Market Participants may coordinate with any other Market Participant as needed for the completion of the desired test scenario before the start of testing.
5. Market Participants must have updated their testing worksheet, if applicable. Worksheet required to allow ERCOT system to set up to accept transactions.
6. **Environmental Support**
7. ERCOT Business Support
   1. ERCOT Business Support for sandbox testing is available from 9:00 AM to 4:00 PM on Retail Business Days.
   2. To request Business support or notify ERCOT of your plan to test, submit a MarkeTrak -Market Rule” subtype issue using the Production instance of MarkeTrak. Required market rule text to be used for this issue type is Sandbox Testing (Do not make request using the MarkeTrak instance in the CERT Environment. That instance of MarkeTrak will not be monitored.)
   3. Business support should be requested at least 5 Retail Business Days in advance.
   4. Support for any request received less than 5 Retail Business Days in advance will be provided at ERCOT’s discretion.
8. ERCOT IT Support
   1. ERCOT IT Support for sandbox testing environment is available from 9:00 AM to 4:00 PM on Retail Business Days.
   2. Issues with the testing environment should be reported through the ERCOT Helpdesk, [Helpdesk@ERCOT.com](mailto:Helpdesk@ERCOT.com) or 512-248-6800 specifying “CERT Environment”.
9. **Environmental Availability and Performance**
10. Environmental Availability
    1. Environment will be available for sandbox testing except during code migrations. ERCOT will send notice to the market.
    2. Environment will be available for Flight Testing / Ad Hoc Flight Testing only during the designated Flight Testing windows.
    3. Sandbox testing can run simultaneously with Flight Testing / Ad Hoc Flight Testing.
11. Environmental Performance
    1. A maximum of 3 Market Participants can do volume testing in the environment simultaneously.
       1. Permission to run volume testing must be obtained by submitting a MarkeTrak “-Market Rule” subtype issue to ERCOT using the Production instance of MarkeTrak as early as possible, but not later than 5 Retail Business Days prior to first day of testing. The issue must contain the timeframe of the planned testing plus the expected volume of transactions.
       2. If more than 3 Market Participants request volume testing during the same timeframe, the first 3 requests received will be accepted and the additional Market Participants must wait. The MarkeTrak issue will be updated to indicate the testing date granted.
    2. Transaction timing in the sandbox environment may not meet ERCOT Protocols when high volumes of transactions are submitted.
12. **Guidelines for the Environment**
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14. Market Participants will aggregate their .EDI transactions as they do in Production. For example, 1 file of 3,000 transactions, not 3,000 files containing 1 transaction each.
15. ESIIDs set aside for use during Flight Testing will not be used for Sandbox Testing. ESIIDS available for testing is posted on the ERCOT.com page( add link)
16. **Best Practices**
17. If a MP has plans to test more than 10 ESI IDs, the MP should notify ERCOT of plans to test, and it is recommended to provide a courtesy notice (via Production MarkeTrak “Market Rule” subtype) to make ERCOT aware of your testing efforts.
    1. Unless ERCOT action is needed, ERCOT will not monitor testing activity in which they are not part of.
18. When communicating with ERCOT, MPs should identify the ESIIDs desired to be tested to ensure those ESIIDs are not already reserved for another testing MP.
19. Environmental Functionality
20. MIS Reporting functionality is not included in the Retail Market Test Environment.
21. Retail Market Testing Environment is not linked to the ERCOT Settlement system and any testing against the Settlement system must be coordinated through ERCOT separately.
22. ESI IDs available to use for Retail Market Test Environment can be found on the Retail page on ERCOT.com (<http://ercot.com/mktinfo/retail>), “[Retail Market Testing Environment ESI IDs](http://ercot.com/content/wcm/key_documents_lists/89277/Retail_Testing_ESIIDs.xlsx" \t "_blank)”
    1. “Create Date” is the date the ESIID was loaded in the Retail Market Test Environment.
23. Retail Market Test Environment ESI ID Refresh Schedule