**Retail Market Testing Environment User Guide**

1. **Retail Market Testing Environment Background**

The Retail Market Test Environment (RMTE) allows Market Participants (MPs) to perform testing independent of ERCOT Flight testing within the ERCOT Certification environment (CERT) prior to go-live in Production (PROD). The RMTE was a result of SCR786 which directed ERCOT to create a testing environment that mimics the ERCOT PROD environment.

MPs may coordinate with ERCOT and/or any other Market Participant as needed for the completion of the desired test scenario before the start of testing. Instructions for MPs to coordinate testing scenarios can be found in Section 5, Best Practices.

This environment can be used to test the following business functional processes, such as:

Texas SET EDI Transactions:

MPs can send individual, as well as batched, TXSET transactions. Includes point-to-point transactions (650s, 814\_PCs, etc.) and transactions that flow through ERCOT as the registration agent.

MarkeTrak GUI/API & MarkeTrak Browser Compatibility:

MPs can test MarkeTrak GUI and API performance and functionality as it would function in Production.

MPs can also test browser compatibility for MarkeTrak GUI with upgraded browser versions in specific configurations.

Non-EDI transactions:

MPs 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]

NAESB EDM Support:

MPs can test NAESB Electronic Delivery Mechanism (EDM) modifications and future version upgrades. MPs must comply with the TDTMS NAESB EDM v 1.6 Implementation Guide found on ERCOT.com: (<http://www.ercot.com/content/mktrules/guides/data_transport/TDTMS_EDM_Implementation_Guide_120915.doc>)

1. **Prerequisites for Testing within the Retail Market Testing Environment**

Market Participants must:

1. Be registered with ERCOT;
2. Have a Digital Certificate in order to access the RMTE;
3. Update their Testing Worksheet (TW), where applicable, to allow ERCOT system to set up to process transactions;
4. Coordinate with their service provider, if applicable, before testing in the Retail Market Testing Environment;
5. A()
6. **Environmental Support**
7. ERCOT Business Support
	1. ERCOT Business Support for testing activities is available from 9:00 AM to 4:00 PM on Retail Business Days.
	2. Support for any request received less than 5 Retail Business Days in advance will be provided at ERCOT’s discretion.
	3. To request Business support or notify ERCOT of your plan to test, MPs should submit a MarkeTrak “Market Rule” subtype issue (Other D2D) using the Production digital certificate (MPs shall not submit via the testing digital certificate as testing environment MarkeTrak is not monitored by ERCOT).

**MPs must state “*Retail Market Testing Environment Business Support*” in the Market Rule field.**

1. ERCOT IT Support
	1. ERCOT IT Support for Retail Market 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 or 512-248-6800 specifying “RMTE IT Support”.

 **4. Environmental Availability/Performance & Coordinating Volume Testing with ERCOT**

1. Environmental Availability & Performance
2. The Retail Market Testing Environment will be available for testing except during code migrations. The Retail system release schedule can be found on the ERCOT Service Level Agreement page (<http://ercot.com/services/sla/index.html>) under “Retail Market IT Services SLA 20xx”.

Since the RMTE release schedule may differ from the Production environment release schedule, ERCOT will send a market notice with details and specific dates & times the RMTE will not available.

1. Retail Market testing can run simultaneously with Flight/Ad Hoc Flight Testing but is a completely separate function. The RMTE should only be used for Flight/Ad Hoc Flight Testing during the designated Flight Testing windows.

The Flight/Ad Hoc Flight Testing schedule can be found here: <https://etod.ercot.com/> under “Approved 20xx Test Flight Schedule.doc”

ESI IDs that are restricted to Flight Testing are designated under the “Reserved for Flight” tab within the file “Retail Market Testing Environment ESI IDs” under Key Documents at <http://ercot.com/mktinfo/retail>.
2. Coordinating Volume Testing with ERCOT

A maximum of 3 MPs can do volume testing in the environment simultaneously. In order to conduct volume testing, coordination must occur with ERCOT before initiating the test. protocols timing requirements within the

* 1. Permission to run volume testing must be approved by ERCOT via submitting a MarkeTrak “Market Rule” subtype issue to ERCOT (using the Production instance of MarkeTrak) as early as possible, but no later than 5 Retail Business Days prior to the requested first day of testing. The issue must contain the timeframe of the planned testing in addition to the expected volume of transactions.
	2. If more than 3 MPs request volume testing during the same timeframe, the first 3 requests received will be accepted and the additional MPs must wait. The MarkeTrak issue will be updated to indicate the testing date granted and any additional details needed for coordinated volume testing.
1. **Environmental Functionality**
2. MIS Reporting functionality is not included in the RMTE.
3. RMTE is not linked to the ERCOT Settlement system and any testing against the Settlement system must be coordinated through ERCOT separately.
4. RMTE utilizes the same connectivity specifications as the Certification environment as detailed on the MP’s Testing Worksheet found on <https://etod.ercot.com/>
5. Retail Market Testing Environment ESI ID Spreadsheet will contain the following specifications:
	* 1. Refresh Date
		2. ESIID
		3. TDSP DUNS
		4. ESIID\_ Status
		5. Create\_Date – Test Environment
		6. ESIID\_Type
		7. Zip Code
		8. AMS\_Flag
		9. Switch Hold Indicator
		10. Service Address (Street, City, Zip) – will default to delimited; i.e. how it looks like in MIS
		11. Meter Read Cycle Number
		12. Meter Cycle by Day of Month
		13. Station ID
		14. Metered/Unmetered (if available)
		15. Comments (if needed)
6. Retail Market Test Environment ESI ID Refresh Schedule
	1. ERCOT to perform ‘global’ refresh of the ESIID specifications (listed above) before each flight. Minimum of 3 refreshes per year in accordance with the market-approved Flight schedule: Feb, June, Oct.
	2. Ad-hoc refresh requests must have 5 business days notice, and will overlay any existing information in the ESI ID spreadsheet.
7. **Best Practices**
8. 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. Unless ERCOT action is needed, ERCOT will not monitor testing activity in which they are not part of.
9. 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.