Retail Market Testing Environment

User Guide

Version 1.0

June 1, 2017

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|  |  | Summary of Changes |
| June 1, 2017  Version 1.0 |  | Initial Release |
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**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). 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. 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.)
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. Business support should be requested at least 5 Retail Business Days in advance. 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 (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 “*RMTE 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](mailto:Helpdesk@ERCOT.com) or 512-248-6800 specifying “RMTE IT Support”.
2. **Environmental Availability & Coordinating Testing with ERCOT**
3. Environmental Availability
4. 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 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. Transaction timing protocols may not meet timing requirements within the ERCOT Protocols when high volumes of transactions are submitted.

* 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. Retail Market Test Environment Functionality
   1. RMTE ESI ID Loading & ESI ID Characteristic Changes

ERCOT loads the RMTE with 814\_20 Add transactions submitted by TDSPs in Production. Once loaded, the ESIID characteristics will not change in the RMTE unless the TDSP sends an 814\_20 Maintain to the RMTE or submit an ad-hoc request to ERCOT via MarkeTrak “Market Rules” subtype. If a MT issue is submitted, MP should include as much specificity and details as possible to which characteristics will be changed.

The Retail Market Testing Environment ESIID list can be found here: <http://ercot.com/mktinfo/retail>.

* 1. Characteristics of ESIIDs on the list

columns\*\*

* + 1. (is the date of latest refresh)
    2. (defaults to “De-energized”)
    3. (is the date loaded in the RMTE)
    4. ()

*\*\*Any characteristic listed can be changed via 814\_20 Maintain and/or Production MT “Market Rules” subtype by Testing MP, as needed.*

* 1. ESIID Spreadsheet Refresh Procedure

Global Refresh

ERCOT will perform a global refresh of the ESIID specifications (listed above) before each flight in accordance with the market-approved Flight schedule. With each ESIID Spreadsheet global refresh, characteristics above will reflect the point-in-time status in the RMTE.

Ad-Hoc Refresh

Testing MPs may request an ad-hoc ESIID refresh to assist with ad-hoc testing needs. Ad-hoc refresh requests must have 5 business days’ notice, and will overlay any existing information in the ESI ID spreadsheet as requested. Ad-hoc refresh requests shall be submitted via Production MT “Market Rules” subtype by Testing MP.