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Transmission Rights Market Enhancement and Platform Refresh Project

Market Trial Week 2 Recap and Preparation for Week 3 and 4

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Welcome and Introduction

- This session is being conducted to provide participants an opportunity to ask questions on the Market Trials week 2) discuss defects/issues, and prepare for week 3.
- This presentation and all other information will be posted on the Transmission Rights Market Enhancement and Platform Refresh engagement page.

Participation

- For questions and comments click on the "raise hand" icon (hand symbol) at the top of the application window. This will indicate to the host you would like to speak.
- To unmute audio, click on the microphone icon at the top of the application window. Audio should be muted when not asking a question.

Agenda

1. Week 2 Recap
2. Defects/Issues
 - Reports
3. Week 3 and 4 Prep



Week 2 Recap

TRA Market Trial Readiness

You should have:

- ✓Registered in Sandbox environment
- ✓Have activated gateway access, if new users
- ✓Have taken the E-Learning module
- ✓Completed connectivity testing in Sandbox
 - [IESO Sandbox TRA Application](#)
 - [IESO Sandbox Participant Reports](#) - check access to public and private report site
- ✓**TRA Bidders/Users can only access the application using their primary account. If representing multiple organizations, each of these organizations are now available under their primary account. All other accounts are no longer required.**

Market Trial – High Level Schedule

Week	Activity
Week 1 – Preparing for Market Trial (May 13 – 17)	Unstructured Testing Structured Testing <ul style="list-style-type: none">• Connectivity Testing
Week 2 – Market Trial (May 21 – 24)	Structured Testing <ul style="list-style-type: none">• ST Pre-Auction Report Testing• Bid on ST Auction• Review ST Auction Results/Post-Auction Reports• LT Pre-Auction Report Testing
Week 3 - Market Trial (May 27 – 31)	Structured Testing <ul style="list-style-type: none">• Bid on LT Auction• Review LT Auction Results/Post-Auction Reports
Week 4 – Market Trial (if needed)	Structured Testing <ul style="list-style-type: none">• Re-testing if needed

Market Trial Testing – Week 2 Test Plan

Week 2	Timing	Performed By	Activities
Day 1	Statutory Holiday		
Day 2	All Day	Market Participant	<ul style="list-style-type: none">• Review pre-auction reports for ST auction test - TTC and Monthly Financial.• Participate in the short-term auction.• Log defects or send questions at the end of the day to customer.relations@ieso.ca with subject line "TRA Market Trials" (always use this email and subject line when sending in defects, questions, or status updates).
Day 3	AM/PM (until 5 PM EST)	Market Participant	<ul style="list-style-type: none">• Continue to participate in the short-term auction.• Log defects or send questions at the end of the day to customer.relations@ieso.ca.
Day 4	All Day	Market Participant	<ul style="list-style-type: none">• Participants can review Post Auction reports and Auction Results.• Review Participant Notification Report; Bid History Report and Post-Auction MCP Report.• View posted auction (week 3 LT auction).• Review pre-auction reports for posted auction (i.e. week 3 LT auction - TTC report, pre-auction MCP report).• Log defects or send questions at the end of the day to customer.relations@ieso.ca.

Day 5 on next slide

Market Trial Testing – Week 2 Test Plan

Week 2	Timing	Performed By	Activities
Day 5	9:30 am to 10:30 am	Market Participant, IESO	<ul style="list-style-type: none">• IESO conducts assessment of Defects (as necessary) Q&A.• Q&A session with Market Participants.<ul style="list-style-type: none">○ Meeting to be scheduled to discuss execution and defects.○ Prepare for next week's LT auction test.

Defects/Concerns

- Posting of pre-auction reports delay
 - Configuration issues with sandbox environment resulted in the delay
 - **Resolved** - Reports were published on Tuesday for viewing
- Accessing private reports
 - System wide issue with sandbox resulted in issues with access
 - **Ongoing** – IESO is still rectifying the situation
- No other defects/concerns were raised by MPs for week 2

Overview of Test Case Scenarios for Week 2

1. Validate access to TRA application and to the reports site (public and private). Could be completed week 1 or 2
2. Validate that users or TRA bidders can switch between their respective organisations, if applicable. Conducted during the week leading to up to market trials. Could be completed week 1 or 2
3. Validate pre-auction reports that are relevant to market participant.
4. Validate that help links work as expected. Could be completed week 1 or 2
5. Validate auction displays correct status at the right time (Active – ST, Closed – ST, Posted - LT).

Overview of Test Case Scenarios cont.

6. Validate user can submit, edit and delete bid laminations for Short Term (ST)
 - Bidding limits are adjusted accordingly based on the bids submitted.
 - Validate other functions associated with bid submission are updated.
 - Validate bid validations are working as expected.
 - Validate user can bid on different paths.
 - Validate user can submit multiple laminations on any path available.
 - Validate user is able to switch between organisations and submit /edit/delete bids
7. Validate if multiple users are present for the same organisation, they can submit /edit/delete the bids interchangeably.
8. Validate if post-auction reports (public and private) are generated as expected and data is correctly. Information displayed is based on the final bids submitted.



Week 3 and 4 Prep

Market Trial – High Level Schedule

Week	Activity
Week 1 – Preparing for Market Trial (May 13 – 17)	Unstructured Testing Structured Testing <ul style="list-style-type: none">• Connectivity Testing
Week 2 – Market Trial (May 21 – 24)	Structured Testing <ul style="list-style-type: none">• ST Pre-Auction Report Testing• Bid on ST Auction• Review ST Auction Results/Post-Auction Reports• LT Pre-Auction Report Testing
Week 3 - Market Trial (May 27 – 31)	Structured Testing <ul style="list-style-type: none">• Bid on LT Auction• Review LT Auction Results/Post-Auction Reports
Week 4 – Market Trial (if needed)	Structured Testing <ul style="list-style-type: none">• Re-testing if needed

Market Trial Testing – Week 3 Test Plan

Week 3	Timing	Performed By	Activities
Day 1	All Day until 5PM	Market Participant	<ul style="list-style-type: none">• Participate in LT auction - Round 1.• Auction closes at 5 PM and IESO send out results and reports.• Log defects or send questions at the end of the day to customer.relations@ieso.ca with subject line "TRA Market Trials" (always use this email and subject line when sending in defects, questions, or status updates).
Day 2	All Day	Market Participant	<ul style="list-style-type: none">• Participants can review post auction reports/results.• Review Participant Notification Report, Bid History Report and Post-Auction MCP Report.• Log defects or send questions at the end of the day to customer.relations@ieso.ca.
Day 3	All Day until 5PM	Market Participant	<ul style="list-style-type: none">• Participate in LT auction - Round 2.• Auction closes and IESO sends out results and reports.• Log defects or send questions at the end of the day to customer.relations@ieso.ca.
Day 4	All Day	Market Participant	<ul style="list-style-type: none">• Participants can review post auction reports/results.• Review Participant Notification Report, Bid History Report and Post-Auction MCP.• Log defects or send questions at the end of the day to customer.relations@ieso.ca.

Day 5 is included on next slide

Market Trial Testing – Week 3 cont.

Week 3	Start	Performed By	Activities
Week 3 - Day 5	Will be scheduled	Market Participant, IESO	<ul style="list-style-type: none">• IESO conducts assessment of Defects (as necessary) Q&A.• Q&A session with Market Participants.<ul style="list-style-type: none">○ Meeting to be scheduled to discuss execution and defects.○ Discuss re-testing.• Wrap up Market Trial (tentative).

Market Trial Testing – Week 4 Test Plan

Week 4	Start	Performed By	Activities
Week 4 - Day 1	All Day	Market Participant	<ul style="list-style-type: none">• <u>Re-testing defects if needed.</u>• Log defects or send questions at the end of the day to customer.relations@ieso.ca with subject line "TRA Market Trials" (always use this email and subject line when sending in defects, questions, or status updates).

The IESO will communicate with market trial participants if there is a need for retesting and the appropriate steps to complete them

Overview of Test Case Scenarios for Week 3

1. Validate access to TRA application and to the reports site (public and private).
2. Validate that users or TRA bidders can switch between their respective organisations, if applicable. Conducted during the week leading to up to market trials.
3. Validate pre-auction reports that are relevant to market participant.
4. Validate that help links work as expected.
5. Validate auction displays correct status at the right time (Active – LT, Between Rounds – LT, Closed - LT).

Overview of Test Case Scenarios cont.

6. Validate user can submit, edit and delete bid laminations for Long Term (LT) Auction
 - Bidding limits are adjusted accordingly based on the bids submitted and TRs awarded in Round 1.
 - Validate other functions associated with bid submission are updated.
 - Validate bid validations are working as expected.
 - Validate user can bid on different paths.
 - Validate user can submit multiple laminations on any path available.
 - Validate user is able to switch between organisations and submit /edit/delete bids
7. Validate if multiple users are present for the same organisation, they can submit /edit/delete the bids interchangeably.
8. Validate if post-auction reports (public and private) are generated as expected and data is correctly. Information displayed is based on the final bids submitted.

Communications Plan/Progress Reporting

- At the end of each week a status update email on testing progress is required by those participating in the Market Trials. Email should be sent to customer.relations@ieso.ca with subject line "TRA Market Trials" and should include "Test Scenario Tracker" sheet from Defect Tracker template.
- At the end of each day of testing an email with the issues/bugs encountered must be sent to customer.relations@ieso.ca with subject line "TRA Market Trials" - send "Defect Template" and "Defect Screenshots" sheets from Defect Tracker template.
- Market Trial participants must attend IESO scheduled meetings to resolve defects/issues. Meetings will be scheduled for the end of each week.

Market Trial Test Plan – Issue/Bug Log Template

The "Defect Template" will be used to send status updates and log issues/bugs that must be emailed to customer.relations@ieso.ca with the subject line "TRA Market Trials" at the end of each day of testing. This template is available online on the TRA project Engagement page.

Questions, please!



Thank You

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