

# **ICAP Sandbox Exercises**

# Agenda

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- **Market Trial Environment**
- **ICAP Organizational and User security configurations**
- **Recommended MP exercises**

# Market Trial Environment

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- **NYISO will prepare environment that is representative of post-deployment production**
  - ✓ *All Organizations will be ICAP active*
  - ✓ *All appropriate ICAP privileges granted to Organizations*
- **All MP security configurations made during sandbox will be remain through all Market Trial exercises**
  - ✓ *Security configurations will have to be recreated when system is deployed to production*

# Market Trial Environment

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- **All Organizations will have an administrator account**
  - ✓ *If you don't know your password, your CRD representative can reset it.*
- **Passwords**
  - ✓ *Organization and User information in Market Trial environment populated from production on 4/28/05*
  - ✓ *The ICAP application authentication process is case-sensitive*
    - **Passwords changed in production prior to 4/28/05 were converted to uppercase**

# Organization Configuration

- **Log into Marketplace (MIS) as administrator and verify organizational settings**

✓ *Select Organizations menu link*



[Administrators](#) - [Load Parameters](#) - [Load Serving Entities \(LSEs\)](#) - [Log Out](#) - [New User](#) - [Organization Users](#) - [Organizations](#) - [Sub-Zone Parameters](#) - [Zone Parameters](#) -



# Organization Configuration

- As administrator, verify ICAP organizational settings
  - ✓ *Sample page below. System will display only organization-appropriate privileges.*

## Privileges

DAM Generators	HAM Generators	Physical Load	Virtual Load	Virtual Supply	DAM Transactions
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
HAM Transactions	Non-Firm Transactions	TCC	ICAP	Update UC Data	Billing
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## ICAP-related Privileges

Certify

DMNC

# Organization Users

- As administrator, identify users to configure for Market Trial environment



[Administrators](#) - [Load Parameters](#) - [Load Serving Entities \(LSEs\)](#) - [Log Out](#) - [New User](#) - [Organization Users](#) - [Organizations](#) - [Sub-Zone Parameters](#) - [Zone Parameters](#) -



- ✓ *Users will have to be ICAP active to use ICAP system*
- ✓ *The same privileges available to Organization will be available to Users. Privileges control write access to specific modules*
- ✓ *Reset password of user account.*

# Organization Users

- If Organization does not have any existing Users, create new User account



- ✓ *At minimum, define name, phone #, unique user name, check ICAP active flag and appropriate ICAP privileges*
- ✓ *After User successfully inserted, locate User through Organization Users page and set password*

# ICAP Privileges - explained

- This table shows which pages and templates are associated with each ICAP privilege.

Role Name	Permissions	Valid Org Types	Affected Templates
<b>Bid to Purchase</b>	Enter Bids Maintain Bids Copy Bids	Billing Org	Upload Bids
<b>Offer to Sell</b>	Enter Offers Maintain Offers Copy Offers	Billing Org	Upload Offers
<b>Certify</b>	Maintain/Enter Bilaterals Allocate Sales Assign Transaction Id to Ext Sales	Billing Org Non-Billing Org	
<b>DMNC</b>	Maintain DMNC/PMPC	Supplier	Upload DMNC
<b>Maintain TO Data</b>	Maintain Daily Forecasts & Actual True Up Record LSE Load Forecasts Maintain List of TO LSEs	Transmission Owner	Upload Load Forecasts

# Recommended MP Exercises

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- **User Authentication/Authorization**
  - ✓ *Use both the browser-based and Upload/Download interface to login to system*
  - ✓ *Upon successful authentication, verify that User has proper authorizations*
- **Market Functionality**
  - ✓ *Attempt to insert and view market data*

# User Authentication/Authorization

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- Log into ICAP system using user account



Login Required

**You are attempting to access a protected resource**

Please identify by entering your user ID and password.

User ID:

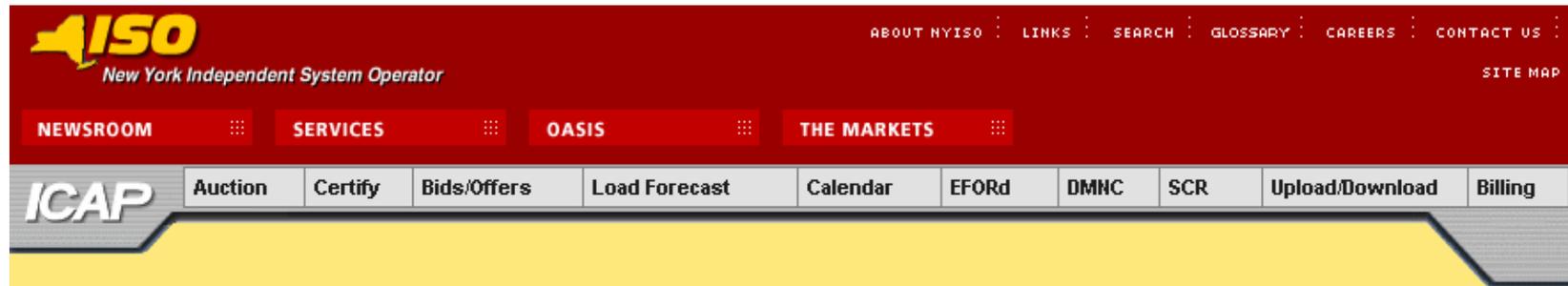
Password:

Go 

# User Authentication/Authorization

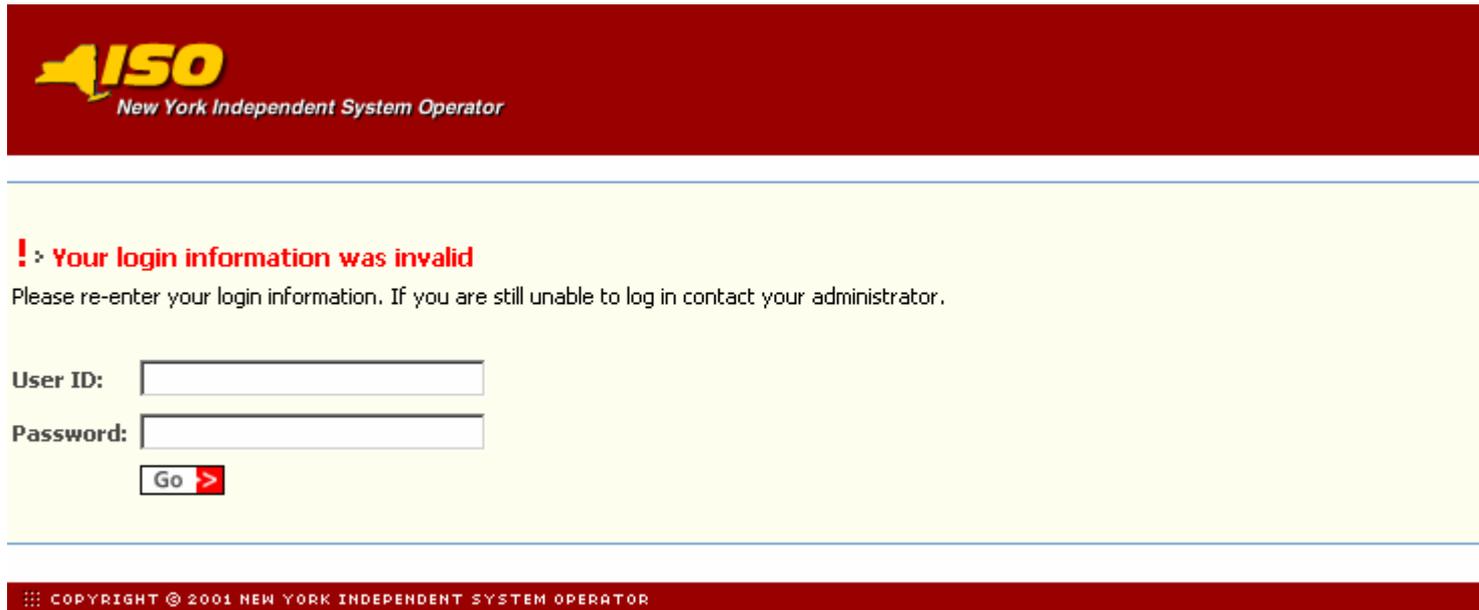
- **Successful login**

- ✓ *Menus will be dynamically generated to display only appropriate links for User*
- ✓ *Navigate through system, verify access to expected pages*



# User Authentication/Authorization

- Unsuccessful login attempt



The screenshot shows the NYISO login interface. At the top left is the NYISO logo with the text "New York Independent System Operator". Below the logo is a red banner with a white exclamation mark and the text "Your login information was invalid". Underneath the banner is a message: "Please re-enter your login information. If you are still unable to log in contact your administrator." Below the message are two input fields: "User ID:" and "Password:". Below the password field is a "Go" button with a red arrow pointing right. At the bottom of the page is a red footer bar with the text "COPYRIGHT © 2001 NEW YORK INDEPENDENT SYSTEM OPERATOR".

# User Authentication/Authorization

- Navigate to Upload/Download interface and submit template to test user access and privileges



## Upload/Download

File name:

# User Authentication/Authorization

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## ■ Upload/Download Error Messages

✓ *“Invalid login information.”*

- This is an authentication error where either the user’s username or password is incorrect.

✓ *“User not authorized to perform this action.”*

- This is an authorization error where the user does not have the proper privileges to execute this template. Verify proper ICAP privileges have been granted.

# Market Functionality

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- **The following exercises will be supported in the sandbox period**
  - ✓ ***June 2005 Monthly Auction open for Bids and Offers (for all appropriate bid/offer months - i.e. June, July, August, September, and October);***
  - ✓ ***DMNC tests can be entered/uploaded in the Summer 2005 test period***
  - ✓ ***Bilaterals can be entered and confirmed in June 2005***
  - ✓ ***Allocation to PTIDs will not be available since no auctions will be run***

# Market Functionality

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- **The following exercises will be supported in the sandbox period for Transmission Owners only**
  - ✓ *June 2005 Load Forecast period will be open*
  - ✓ *May 2005 Load Shift (Initial Forecasted Daily Load) period will be open*
  - ✓ *No True-Up Load Shift submittal periods will be open (Same format as Load Shift data)*

# Sandbox Summary

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- **All security configurations will be retained for Market Trial Exercises 2 and 3**
- **All market data uploaded in sandbox will be removed prior to MT 2.**
- **Specific URLs for Marketplace and ICAP application will be distributed prior to beginning of Sandbox exercise**