MHHS PROGRAMME

Industry-led, Elexon facilitated

SIT Functional & Migration Test Cycle 3 Day-in-the-life (DITL) Guidance

MHHS-DEL2238

Version 3.0

Document overview

The **SIT Functional Test (SIT F & M) Day in the Life (DITL) Guidance Document** provides Systems Integration Testing (SIT) participants with a detailed insight into how the Programme and participants will work together to deliver a successful SIT Functional Test Cycle.

Participants will be able to use this document to **gain an understanding** of how the Programme will facilitate their **successful execution of SIT and subsequent Test Exit** across a number of different areas.

The Programme is committed to supporting participants in building their readiness for SIT F & M in line with their assigned Cohort(s). This document enables this readiness by **providing participants with detail on how SIT F & M will feel and look, and they will be expected to engage**.

This document is intended to **drive a two-way dialogue between the Programme and the SIT participants.** Please provide input and feedback on this document during the SIT F & M DITL Discussion session.

We are committed to using the discussion to **identify risks and potential blockers** to progress prior to the commencement of your SIT F & M Cohort.

Navigating the DITL pack - the Cycle 3 DITL pack is comprehensive and consolidates DITL materials published for Cycles 1 & 2, interim guidance material published to Participants and new content for Cycle 3

Notes on Content Navigation:

1. The pack is organised into sections which can be found on the Contents pages
2. Each Contents section heading is also a link which can be Ctrl-clicked on to navigate to that part of the pack, in addition links are provided to sections that have been added or changed for Cycle 3
3. Content that is '**New** for Cycle 3' or '**Updated** for Cycle 3' is labelled in the top right-hand corner of each slide
4. For ease of navigation each page of the pack contains a link in the bottom right-hand corner of the slide which can be Ctrl-clicked to return to the Contents page

1 & 2.

Document Hyperlinks for each Section

Document Hyperlinks for Sections that have been specifically added or changed for Cycle 3

Contents (1 of 2)

Section #	Heading (Link)	Content
1	SIT Functional & Migration DITL – What to Expect	• Your Key Points of … Execution – Role of the Cohorts, Central Parties and SI Team • What to expect dur… • What to Expect fro… ur SIT Coordinator
2	Summary on ADO, Cohorts, MS Teams Channels and Stand Ups	• Single ADO Project Implementation (**New** for Cycle 3) • ADO & MS Teams (**Updated** for Cycle 3) • Test & Defect Meetings (**Updated** for Cycle 3)
3	SIT Sprint Process	• Background & Principles • Master Test Case Spreadsheet • ADO Test Plan Structure (**Updated** for Cycle 3) • Sprint Lifecycle • Test Case Points & Estimation Modelling • Cycle 3 Sprints (**Updated** for Cycle 3) • Test Priority Groupings • Reports & Extracts (**Updated** for Cycle 3)
4	SIT Settlements Testing	• Settlements Testing Approach • Settlement Testing Rationalisation for Cycle 3 (**New** for Cycle 3) • SIT-B Exit Settlement Test Case Priorities / Priority Groupings (**New** for Cycle 3) • Settlement Report Guidance Videos (**New** for Cycle 3)
5	Test Execution	• Process for Executing and Handing Over a Test Case (**Updated** for Cycle 3) • How to identify which Paused test cases have been assigned to you (**Updated** for Cycle 3) • Re-Running a Failed Test Case
6	Test Data	• MPAN Tracking Tool • Data Prep and Data Security • Data Load and Data Services Daily Processing
7	ADO Use Guidance	• Changes to Test Case Tags and Sub-Status Management in the Master ADO Project (**New** for Cycle 3)
8	Teams Channel Use Guidance	• The Teams Channels • Test Case Execution Kick Off and Evidence Upload Alignment
9	Interacting with Central Systems & Services	• DIP Backoff & Retry (**New** for Cycle 3) • DIP Message Replay Functionality via Portal • CSS / MPRS Gate Closure Guidance • Additional Testing Guidance running tests involving DCC or REGS • In the event of DTN Gateway issues

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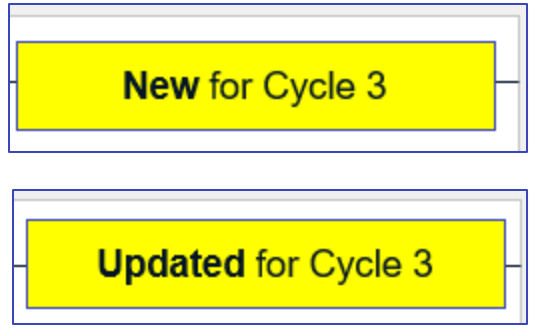

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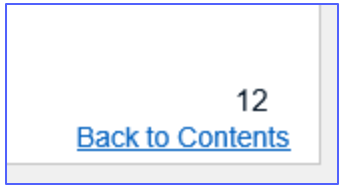

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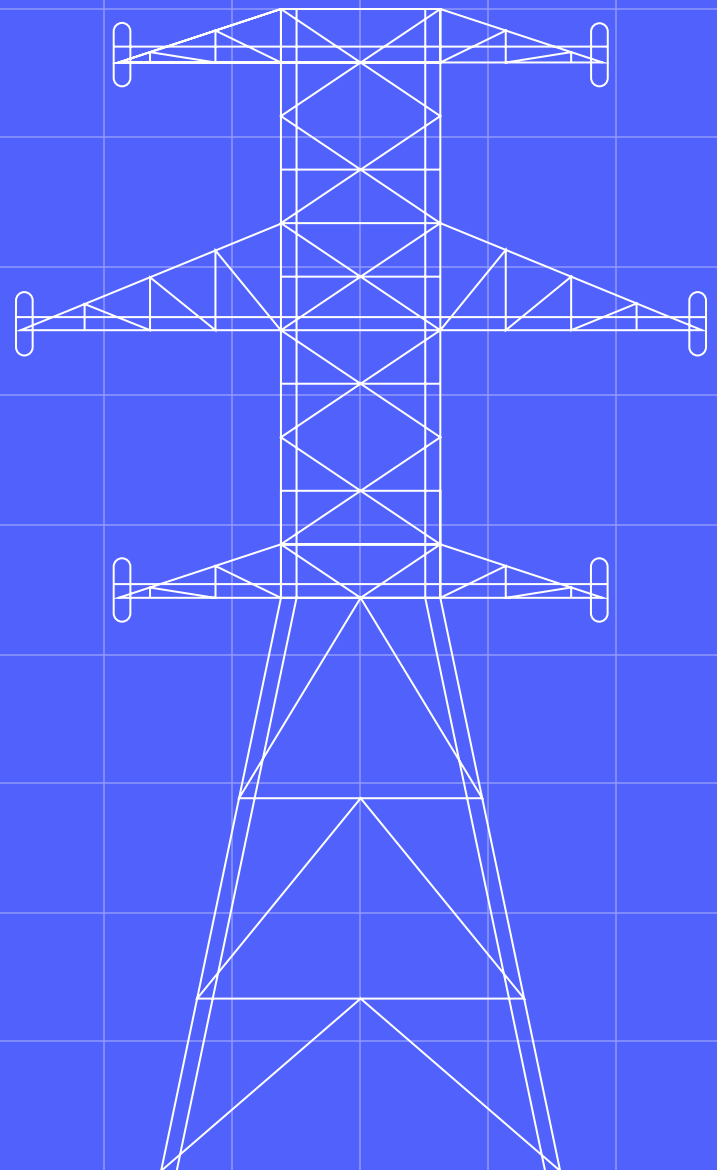
Contents (2 of 2)

SIT Functional & Migration DITL - What to Expect



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Your key points of contact – LDP and SRO

We have provided the key contacts below for each of the parties involved in your SIT Functional and Migration Testing. Delivering SIT F & M successfully will be a collaborative process, it is important you have knowledge of and communication with (via Teams) your fellow participants and key members of the Programme.

Name	Role	Email Address
System Integrator (SI)		
Dominic Mooney	*SIT Delivery Manager*	Dominic.Money@mhhsprogramme.co.uk
Mayur Depala	*SIT Coordinator 1 (Cohorts A & J)*	Mayur.Depala@mhhsprogramme.co.uk
Nikhil Mate	*SIT Coordinator 2 (Cohorts B & F)*	nikhil.mate@mhhsprogramme.co.uk
Jennifer Croome	*SIT Coordinator 3 (Cohorts G & H)*	jennifer.croome@mhhsprogramme.co.uk
Aaron Gale	*SIT Coordinator 4 (Cohorts C & E)*	aaron.gale@mhhsprogramme.co.uk
Ankur Pande	*SIT Migration Lead*	ankur.pande@mhhsprogramme.co.uk
Heath Thomas	*Test Support Lead*	Heath.Thomas@mhhsprogramme.co.uk
Carol-Anne Smith	*Defect Manager*	carol-anne.smith@mhhsprogramme.co.uk
Salman Bukhari	*Defect Manager*	Salman.Bukhari@mhhsprogramme.co.uk
Mohammed Abdullah	*Defect Manager*	mohammed.abdullah@mhhsprogramme.co.uk
Sreeja Dutta	*Environments and Release Lead*	sreeja.dutta@mhhsprogramme.co.uk
Programme Party Coordinator Team		
Bushra Ali	*PPC Lead*	Bushra.Ali@mhhsprogramme.co.uk
Annabel Atkins	*PPC Testing Workstream Partner*	Annabel.Atkins@mhhsprogramme.co.uk
Escalation Points		
Roger Robar	*SI Programme Test Manager (LDP)*	roger.robar@mhhsprogramme.co.uk
Keith Clark	*Programme Director (LDP)*	Keith.Clark@mhhsprogramme.co.uk
Smitha Pichrikat	*Client Delivery Programme Manager (SRO)*	Smitha.Pichrikat@MHHSprogramme.co.uk
Adrian Ackroyd	*Programme Test Manager (SRO)*	Adrian.Ackroyd@MHHSprogramme.co.uk
Kiran Raj	*SIT Functional Lead (SRO)*	Kiran.Raj@mhhsprogramme.co.uk

What to expect during SIT Functional Execution (Cohorts and Central Parties)

Role of the Cohorts and Central Parties

- To provide resources to support a 9am – 5pm testing day (UK time)
- Be accountable for the execution of allocated tests, passing on test cases to downstream cohort members
- To self-manage test execution within Cohorts **and** to be present and responsive to Cohort members and SI within MS Teams Channels
- To attend and contribute to daily stand up and defect meetings (meeting attendance requirements here)
- To provide sufficient support resources to enable the resolution of PP defects in a timely manner
- To capture test evidence and upload into ADO in accordance with the MHHS SIT Evidence Capture policy

Additional Role of the Central Parties

- To support Cohort test execution and attend Cohort Participant stands ups by exception
- To attend and contribute to a daily Central Party stand up and defect meetings and flag any capacity risks, issues or blockers to the SI (meeting attendance requirements here)
- Provide sufficient support resources to enable the resolution of Central Party defects
- To capture test evidence and upload into ADO in line with Central Party evidence capture policy

Role of the SI

- Provide ADO access, training and ongoing support
- Provide the Test Cases and associated Data for Cohort / PP testing
- Provide private MS Teams channels for SI, Central Parties and Cohort Members to communicate
- Provide Sprint test assignment per cohort
- Assign a SIT Functional Coordinator for each cohort as the primary SI point of contact for PPs
- Triage and Manage Central Party defects (Cohort specific defects by exception)
- **Host and Chair daily Participant meetings:**
  - Cohort Stand Ups (8 meetings per day / 15 mins each)
  - Paired CoS / CoA / UMSDS Cohort Stand Ups (5 meetings per day / 15 mins each)
  - Central Parties Stand Ups (1 meeting per day / 30 mins)
  - Central Party Defect Meetings (1 meeting per day / 60 mins)
- **Provide Test & Defect MI & Reports**
  - Real time in ADO and Hourly via ADO Extracts
  - Daily Reports (inc Report Extracts)
  - Post-Sprint Reporting
- Dynamically revise and communicate Cohort Sprint test assignments in response to blocking issues, or Central Party support capacity
- Coordinate Releases and Deployments and assure PP test execution results / evidence

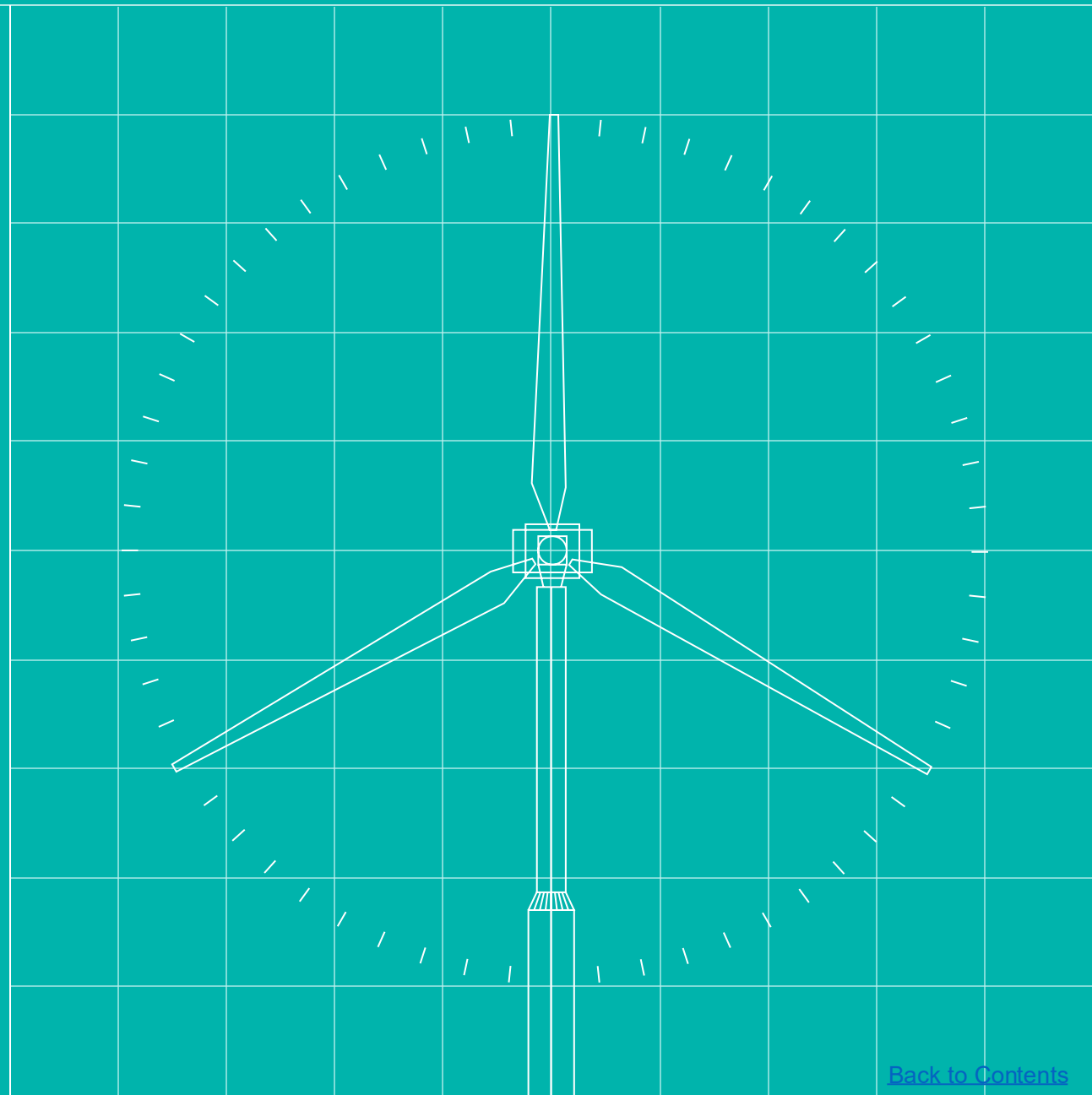
SIT Functional Coordinator

Cohorts are expected to self-manage their test execution and progress; however the SI SIT Functional & Migration Coordinator is the primary SI point of support contact for Participant Cohort testing on a day-to-day basis.

The coordinator will:

- Chair daily stand-up meetings for your cohort, and paired cohort testing to confirm test execution for the day.
- Dynamically maintain the Cohort and Paired Cohort Test case assignments in ADO, this will involve an ongoing dialogue with the cohort members to advise on Central party defects and support constraints that may impact testing and require a change in Sprint priority or allocation, also considering Cohort specific issues and defects that could influence the proposed priorities. **Note -** In some cases this may also include setting Cohort test cases to 'Blocked' status in ADO when a Central Party defect resolution is required.
- Guide Participants on adherence with the SIT Functional & Migration Test DITL ways of working, and associated ADO processes during testing.
- Provide Participants with initial triage support when issues or defects are encountered.
- Facilitate contact and meetings with SI Test, Data and Design SMEs or Defect Management teams when required.
- Facilitate ADO support as and when required.
- Engage with and support the central triage process for defects.
- During a testing day the Coordinator will communicate any newly raised severe defects or environment issues which could impact planned testing.
- Guide Central Parties on when test evidence is required for a Cohort test case.
- Escalate Cohort specific support requirements to the SIT Delivery Manager when required.

Summary on ADO, Cohorts, MS Teams Channels and Stand Ups



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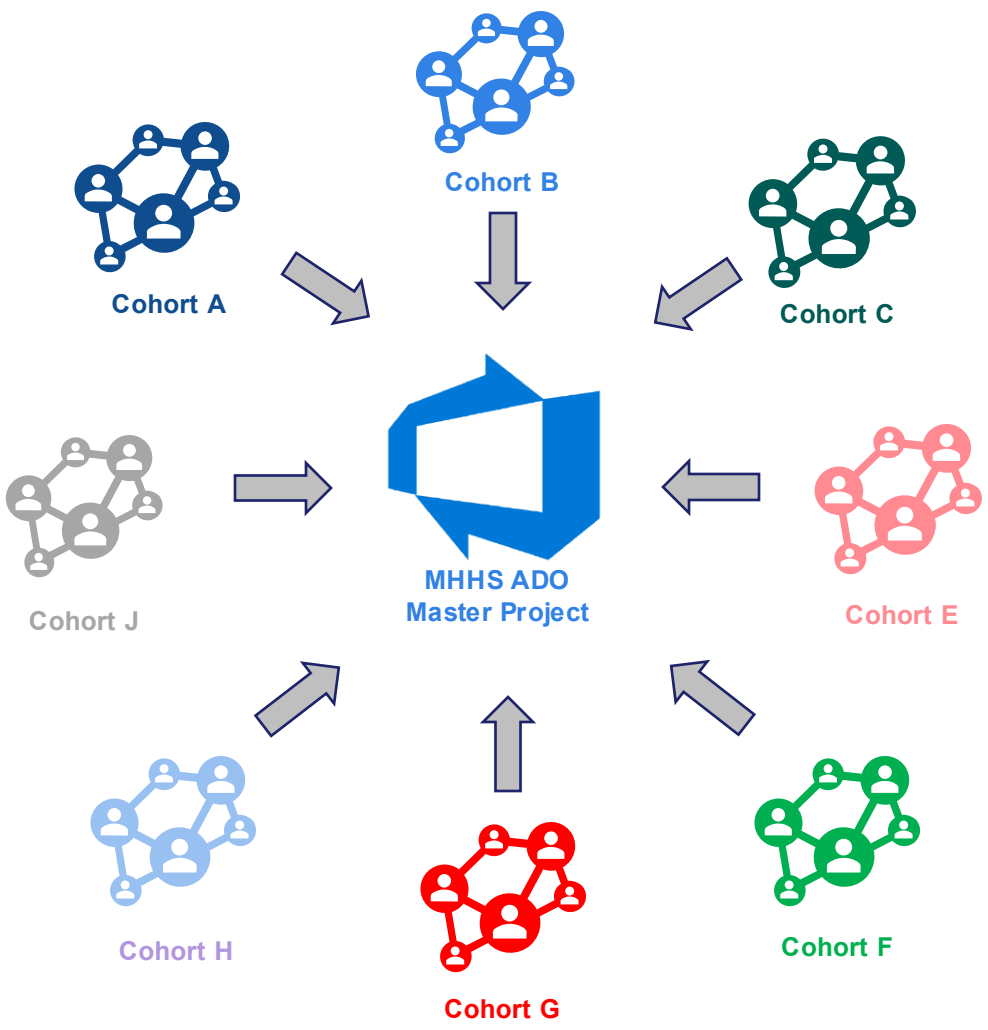
New for Cycle 3

Single ADO Project Implementation for Cycle 3 (1 of 2)



Benefits of a single ADO Project:

- All SIT Participants have visibility of all Tests on the SIT Backlog in ADO (Programme will maintain control of test assignments to sprints)
- SIT Participants have visibility of all defects to inform day-to-day testing decisions
- Centralised real time ADO test status and defect dashboard
- Efficiencies gained in Test Case maintenance and deployment

ADO Technical Implementation:

- Cohort members were granted access and sent a link to the Master ADO project which will be where all SIT testing and defect management activity is being undertaken from 7th Oct onwards
- Participants were invited to drop-in learning sessions in w/c 30th Sept
- Participant access to the existing Cohort ADO projects will remain, noting:
  - Any open Cohort defects at the end of Cycle 2 (IR7) will have been ported over to the Master ADO project for onwards management
  - Closed Cohort defects will remain in the Cohort ADO Project for reference
  - Any tests completed or that were started, but not completed at the end of Cycle 2 (IR7) will remain in the Cohort ADO project – the latter will need to be restarted in the Master ADO project on IR8
  - Participants have been issued guidance that 'ST0030 TC01 - Settling Normally' can be continued after the maintenance window (i.e. IR7 to IR8), but will be asked to transfer all step evidence completed in C2 to a new run of this test case in the Master ADO project

New for Cycle 3

Update on Single ADO Project Implementation (2 or 2)

What will be different after the cutover (ADO Guidance docs and learning sessions provided – See Appendix A):

- When logging into the Master ADO project Cohort members will see a different test plan structure that is based around the Stages at the top level (i.e. SIT F Cycle 3, SIT Settlement, SIT M, SIT NFT, SIT Ops)
- Below the SIT stage plan, PPs will see a suite folder for each sprint, and a sub suite folder for their individual Cohort or Paired Cohort to execute testing from e.g.
    - Sprint 5
        - Sprint 5 - Cohort A
        - Sprint 5 - Cohort B
        - Sprint 5 - Cohort x… etc…
- Cohorts will see ADO test status dashboards for all Sprints and Cohorts
- Cohorts will see all Central Party and Cohort defects and associated defect dashboards
- **Changes to ADO functions / ways of working:**
    - A new mechanism to secure commercially sensitive test evidence and defect attachments will be provided for use (if required), the existing mechanism for test evidence and defect attachment upload will still remain
    - Maintenance of Test Case Tags and Sub-Statuses (See ADO Use Guidance)
    - **Note:** All other functions and ways of working within ADO will remain the same as they are now
- The Daily Defect Management meeting will be run directly from the Master ADO Project
- Participants will be able to review the full backlog of all SIT Test cases in the Master ADO project, these will be grouped by 'Theme', **and** their Cohort specific backlog
- PPs will be able to proactively raise test case defects against their back log if required, thus reducing the impact of TC defects

What will not change following cutover:

- The SI Test team will continue to manage the selection and assignment of test cases to Cohort sprint folders
- Stand ups and use of Teams Channels for communication and coordination remain unchanged
- All other DITL testing, data and defect management processes and ways of working remain unchanged
- **MI / Reporting:**
    - **ADO Dashboards** will be unchanged, just that now PPs will have real-time visibility of all active Cohorts sprint testing and defect status within the Master ADO Project
    - **Hourly ADO Extracts** – will be unchanged and will contain the status of all Cycle 2 sprint tests along with the status of all tests assigned to Cohort sprints in the Master ADO project
    - **Daily Reports and Associated Extracts** – will be unchanged, extracts will contain the status of all Cycle 1 and 2 tests and defects along with the status of all tests assigned to Cohort sprints and associated defects in the Master ADO project

SIT Functional - ADO / MS Teams

Updated for Cycle 3

- In Cycle 3 all Cohort and Central Party ADO users now have access to a single Master ADO Project instances for Testing and Defect management
- Each Main and Paired Cohort continue to communicate on the same Private MS Teams Channel with the same PP members
- SI and Central Parties are members of all Teams Channels

Coordinator 1 = Mayur Depala | **Coordinator 2 = Nikhil Mate** | **Coordinator 3 = Jenny Croome** | **Coordinator 4 = Aaron Gale**

Master ADO Project

MVC

CoS / CoA Paired	A&J Teams Channel	Members	Cohort A Cohort J

CoS / CoA Paired	B&F Teams Channel	Members	Cohort B Cohort F

CoS / CoA Paired	G&H Teams Channel	Members	Cohort G Cohort H

CoS / CoA Paired	C&E Teams Channel	Members	Cohort C Cohort E

Cohort A	Cohort A Teams Channel		
Cohort PPs	**Kraken (SUP)** Kraken (SDS / ADS) Kraken (MSS / MSA) **PDA (UMSDS)**		
Central Parties	Helix St Clements RECCo DIP BUUK SSEN DCC Electralink		

Cohort J	Cohort J Teams Channel		
Cohort PPs	**Utiliteam (SUP)** Stark (SDS / ADS) Stark (MSS / MSA) **Tym Huckin Ltd (UMSDS)**		
Central Parties	Helix St Clements RECCo DIP BUUK SSEN DCC Electralink		

Cohort B	Cohort B Teams Channel		
Cohort PPs	**Kraken (SUP)** SMS (SDS) Itron (ADS) Wheatley (MSS / MSA)		
Central Parties	Helix St Clements RECCo DIP BUUK SSEN DCC Electralink		

Cohort F	Cohort F Teams Channel		
Cohort PPs	**Seaglass (SUP)** TMA (SDS / ADS) IMServ (MSS / MSA)		
Central Parties	Helix St Clements RECCo DIP BUUK SSEN DCC Electralink		

Cohort G	Cohort G Teams Channel		
Cohort PPs	**ESG (SUP)** TMA (SDS) Energy Assets (ADS) ESG (MSS / MSA) PDA (UMSDS)		
Central Parties	Helix St Clements RECCo DIP BUUK SSEN DCC Electralink		

Cohort H	Cohort H Teams Channel		
Cohort PPs	**ESG (SUP)** SMS (SDS / ADS) SMS (MSS / MSA)		
Central Parties	Helix St Clements RECCo DIP BUUK SSEN DCC Electralink		

Cohort C	Cohort C Teams Channel		
Cohort PPs	**ENSEK (SUP)** Callisto (SDS / ADS) Callisto (MSS / MSA)		
Central Parties	Helix St Clements RECCo DIP BUUK SSEN DCC Electralink		

Cohort E	Cohort E Teams Channel		
Cohort PPs	**Utilita (SUP)** IMServ (SDS / ADS) Utilita (MSS / MSA)		
Central Parties	Helix St Clements RECCo DIP BUUK SSEN DCC Electralink		

UMSDS Paired	A,G&J Teams Channel	Members	Cohort A Cohort G Cohort J

Updated for Cycle 3

SIT Functional & Migration Test & Defect Meetings

Meetings Hosted & Chaired by SI	Internal / External	Time	Duration	Chaired by	Objective / Purpose	MHHS Attendance Requirements							
						SI Test	Defect Managers	SI Design	SRO Design	SRO Test	Release Manager	ADO Team	PPC
Cohort A Stand Up	External	9:00 AM	15 Mins	SIT F Coordinator 1	**Purpose -** To discuss that day's Cohort testing schedule and discuss any blockers that may impact execution. **Standing Agenda:** • Review of previous day's activity, and any tests waiting in PPs queues. • Validate planned tests for the day from the execution schedule / order. • Discuss any Cohort or Central Party defects or blockers impacting the planned testing. • By Exception – discuss specific defects or topics with contribution from Central Parties, Defect Management, Test SMEs or the Design Team.	X	By Exception	By Exception		Optional		Optional	FYI
Cohort F Stand Up	External	9:00 AM	15 Mins	SIT F Coordinator 2		X	By Exception	By Exception		Optional		Optional	FYI
Cohort G Stand Up	External	9:15 AM	15 Mins	SIT F Coordinator 3		X	By Exception	By Exception		Optional		Optional	FYI
Cohort B Stand Up	External	9:15 AM	15 Mins	SIT F Coordinator 2		X	By Exception	By Exception		Optional		Optional	FYI
Cohort C Stand Up	External	9:15 AM	15 Mins	SIT F Coordinator 4		X	By Exception	By Exception		Optional		Optional	FYI
Cohort J Stand Up	External	9:30 AM	15 Mins	SIT F Coordinator 1		X	By Exception	By Exception		Optional		Optional	FYI
Cohort H Stand Up	External	9:30 AM	15 Mins	SIT F Coordinator 3		X	By Exception	By Exception		Optional		Optional	FYI
Cohort E Stand Up	External	9:30 AM	15 Mins	SIT F Coordinator 4		X	By Exception	By Exception		Optional		Optional	FYI
Daily Design Team Stand Up	Internal	10:00AM	30 mins	Design Team	**Purpose - t**o feedback / discuss any design issues ahead of the 11am Defect Triage Meeting			X	X				
Daily Defect Triage Meeting	Internal	11:00 AM	60 Mins	Defect Management	**Purpose -** the Programme will review all new defects and assess if they are legitimate defects. If yes, then Triage will allocate the Defect to the right Resolver Group	X	X	X	X	X	X	Optional	FYI
Daily Settlements Stand Up	External	12:30pm	30 mins	SIT Delivery Manager	**Purpose –** all Cohorts to join and discuss high priority Settlement issues, blockers, queries and releases	X	By Exception	By Exception		Optional			**FYI**
A&J Linked Cohort Stand Up	External	01:00 PM	15 Mins	SIT F Coordinator 1	**As per the Cohort Stand Ups but focused on linked Cohort testing.**	X	By Exception	By Exception		Optional		Optional	FYI
F&B Linked Cohort Stand Up	External	01:15 PM	15 Mins	SIT F Coordinator 2		X	By Exception	By Exception		Optional		Optional	FYI
G&H Linked Cohort Stand Up	External	09:45 AM	15 Mins	SIT F Coordinator 3		X	By Exception	By Exception		Optional		Optional	FYI
C&E Linked Cohort Stand Up	External	01:30 PM	15 Mins	SIT F Coordinator 4		X	By Exception	By Exception		Optional		Optional	FYI
A/G/J UMSDS Linked Cohort Stand Up	External	01:45 PM	15 Mins	SIT F Coordinator 1		X	By Exception	By Exception		Optional		Optional	FYI
Daily Defect Management Meeting	External	02:30 PM	60 Mins	Defect Management	**Purpose -** Review Central Party defect status, owners, and progress updates, based on priority and/or severity of the defect, including the planning and coordination of Central Party fix releases.	X	X	X	X	X	X	Optional	FYI
Central Parties Stand Up (CPs Only)	External	04:00 PM	30 Mins	SIT Delivery Manager	**As per the Cohort & Linked Cohort Stand Ups, with the addition of discussing any Central Party support constraints or blockers which may impact planned Cohort testing, and the alignment of fix releases.**	X	X	X	X	X	X	X	X
MHHS Daily Stand Up	Internal	04:30 PM	30 Mins	SIT Delivery Manager	**Purpose –** internal MHHS meeting to discuss high priority issues, blockers and releases	X	X	X	X	X	X	X	X

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Updated for Cycle 3

SIT Functional & Migration Test & Defect Meetings

Meetings Hosted & Chaired by SI	Internal / External	Time	Duration	Chaired by	Objective / Purpose	MHHS Attendance Requirements							
						SI Test	Defect Managers	SI Design	SRO Design	SRO Test	Release Manager	ADO Team	PPC
Cohort A Stand Up	External	9:00 AM	15 Mins	SIT F Coordinator 1	**Purpose -** To discuss that day's Cohort testing schedule and discuss any blockers that may impact execution. **Standing Agenda:** • Review of previous day's activity, and any tests waiting in PPs queues. • Validate planned tests for the day from the execution schedule / order. • Discuss any Cohort or Central Party defects or blockers impacting the planned testing. • By Exception – discuss specific defects or topics with contribution from Central Parties, Defect Management, Test SMEs or the Design Team.	X	By Exception	By Exception		Optional		Optional	FYI
Cohort F Stand Up	External	9:00 AM	15 Mins	SIT F Coordinator 2		X	By Exception	By Exception		Optional		Optional	FYI
Cohort G Stand Up	External	9:15 AM	15 Mins	SIT F Coordinator 3		X	By Exception	By Exception		Optional		Optional	FYI
Cohort B Stand Up	External	9:15 AM	15 Mins	SIT F Coordinator 2		X	By Exception	By Exception		Optional		Optional	FYI
Cohort C Stand Up	External	9:15 AM	15 Mins	SIT F Coordinator 4		X	By Exception	By Exception		Optional		Optional	FYI
Cohort J Stand Up	External	9:30 AM	15 Mins	SIT F Coordinator 1		X	By Exception	By Exception		Optional		Optional	FYI
Cohort H Stand Up	External	9:30 AM	15 Mins	SIT F Coordinator 3		X	By Exception	By Exception		Optional		Optional	FYI
Cohort E Stand Up	External	9:30 AM	15 Mins	SIT F Coordinator 4		X	By Exception	By Exception		Optional		Optional	FYI
Daily Design Team Stand Up	Internal	10:00AM	30 mins	Design Team	**Purpose - t**o feedback / discuss any design issues ahead of the 11am Defect Triage Meeting			X	X				
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Daily Settlements Stand Up	External	10:00pm	30 mins	SIT Delivery Manager	**Purpose –** all Cohorts to join and discuss high priority Settlement issues, blockers, queries and releases	X	By Exception	By Exception		Optional			**FYI**
A&J Linked Cohort Stand Up	External	01:00 PM	15 Mins	SIT F Coordinator 1	**As per the Cohort Stand Ups but focused on linked Cohort testing.**	X	By Exception	By Exception		Optional		Optional	FYI
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C&E Linked Cohort Stand Up	External	01:30 PM	15 Mins	SIT F Coordinator 4		X	By Exception	By Exception		Optional		Optional	FYI
A/G/J UMSDS Linked Cohort Stand Up	External	01:45 PM	15 Mins	SIT F Coordinator 1		X	By Exception	By Exception		Optional		Optional	FYI
Daily Defect Management Meeting	External	02:30 PM	60 Mins	Defect Management	**Purpose -** Review Central Party defect status, owners, and progress updates, based on priority and/or severity of the defect, including the planning and coordination of Central Party fix releases.	X	X	X	X	X	X	Optional	FYI
Central Parties Stand Up (CPs Only)	External	04:00 PM	30 Mins	SIT Delivery Manager	**As per the Cohort & Linked Cohort Stand Ups, with the addition of discussing any Central Party support constraints or blockers which may impact planned Cohort testing, and the alignment of fix releases.**	X	X	X	X	X	X	X	X
MHHS Daily Stand Up	Internal	04:30 PM	30 Mins	SIT Delivery Manager	**Purpose –** internal MHHS meeting to discuss high priority issues, blockers and releases	X	X	X	X	X	X	X	X

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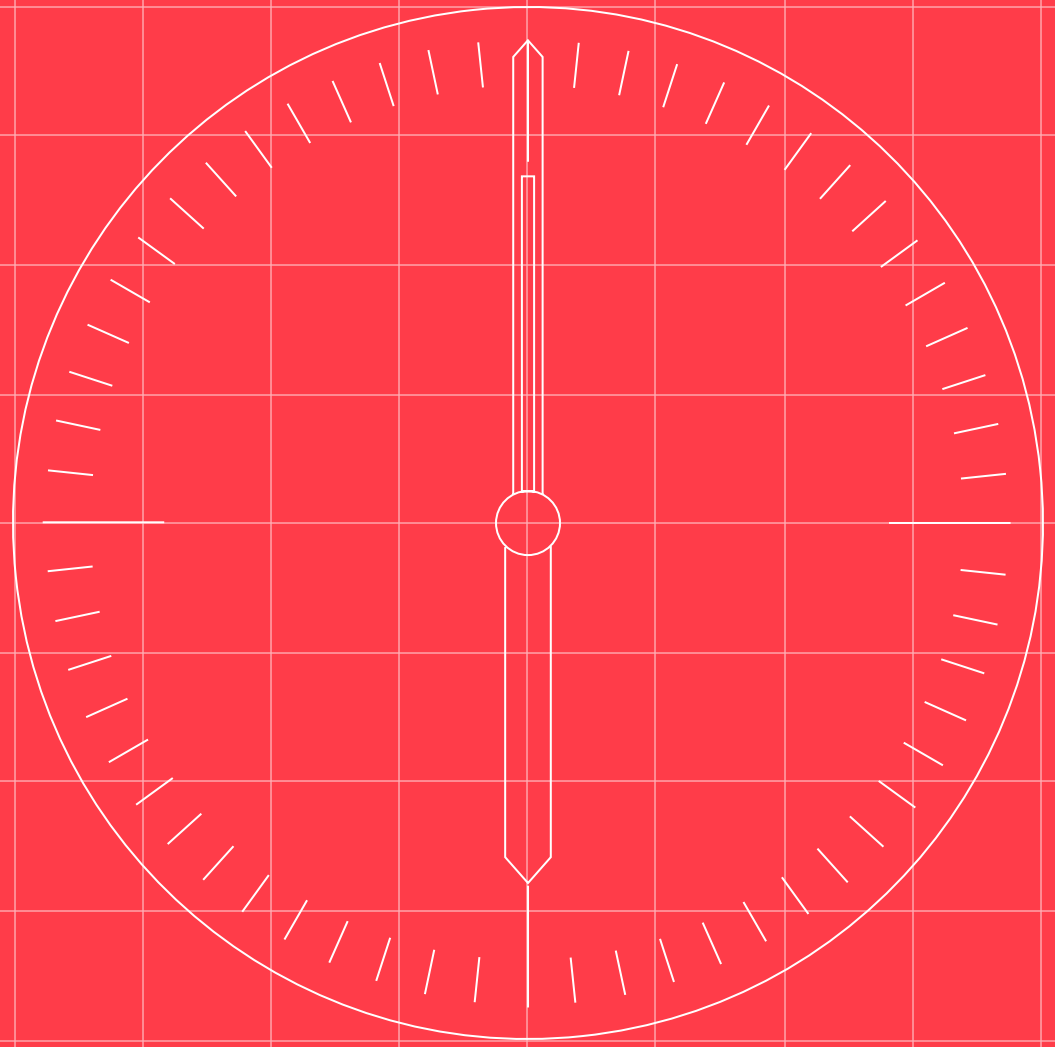
SIT Sprint Process



Background

- In Cycle 1 all tests in scope were loaded into all relevant Cohort and Paired Cohort ADO projects, and there was a degree of flexibility as to which tests could be run by Cohorts. Towards the end of the cycle the programme became more directive on test allocation per Cohort in order to achieve as much coverage of unique tests as possible.

- During Cycle 1 retrospective feedback, Participants asked that the programme continue to be more directive about which tests are assigned to each Cohort to execute.

- In addition, there is consensus that there should be more regular check points to assess if Cohorts are on track to complete SIT Functional testing within the programme time lines and if there should be specific actions to course correct.

Response - for SIT functional Cycle 2 and SIT Migration the programme moved to a sprint-based model, which will continue in Cycle 3.

New Sprint Approach – Key Principles (1 / 2)

- SI Test will assign tests from the overall SIT Functional and Migration test backlogs to each Cohort to execute during a sprint.
- Assignment of different test cases to each sprint will be balanced across Cohorts with the intent to continue to exercise MHHS solution coverage as soon as possible during SIT test cycles. I.e. Cohorts are most likely to have a different set of tests to execute in each sprint. This approach will be balanced with the need for Participants to meet their Qualification requirements in SIT Functional and Migration.
- Sprints will be 2-week cycles (in exceptions this time scale may be increased or decreased based on available time windows).
- It is acknowledged that not all tests are equal, so tests will be rated based on length and given a 'Test Case Points' score. This scoring system will be used to ensure that there is fair loading of assigned tests to each Cohort sprint.
- During a sprint there will be a degree of flexibility for how Cohorts want to sequence the sprint test back log. This can be agreed amongst the Coordinators and Cohort members.
- Sprint backlogs can be dynamic, therefore if during a Cohort sprint the test velocity is moving faster than anticipated, it will be possible to bring more tests into the sprint to meet the Cohort team capacity. Similarly, if a test in the sprint becomes blocked due to a defect, then it will be possible to bring more tests into sprint to maintain velocity.

New Sprint Approach – Key Principles (2 / 2)

- During week 1 of an active sprint the SI Test team will build the sprint backlog for the next sprint and at the end of that week will share with the Cohort to review, during week 2 to there will be an opportunity for Cohorts to plan for and collaborate with SI Test team to refine the next sprint's backlog, to confirm the scope of the next sprint. **Note** this may also include the 'carry over' of inflight tests that haven't concluded from the previous sprint (note active tests can be dragged and dropped from one Sprint folder to another in ADO to enable closure of the previous sprint).

- Centrally the SI Test team will impact assess defects and identify any impacted tests not currently assigned for sprint testing, these will be marked as unavailable to assign to a sprint until the associated defect is fixed. SIT F & M test cases will be maintained in the ADO Master and brought into the Cohort or Paired Cohort Sprint test suites when they have been assigned to the current or next sprint (also gaining efficiencies in maintaining test case versions where Test Case defects have been raised).

- Cohort participants will be encouraged to feedback to coordinators on ways of working and learnings from current sprints that can be factored into the planning of subsequent sprints.

- For SIT Functional Cycle 3 the assignment of tests to Main cohorts and paired cohorts sprints will be balanced so that no main Cohort has an imbalance of Test Points assigned - in essence credit is given for capacity for both main and paired Cohort testing.

- In the week following each sprint cycle the programme will review progress made by each Cohort and assess this achievement based on the forecast models for the Cohort. The Test Points scored velocity will give an indication as to when, based on the current trend, Cohorts are likely to conclude all SIT Functional & Migration tests. This will be reviewed with Cohorts and reported at FTIG.

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Master Test Case Spreadsheet

To support the sprint approach SI Test will maintain a master spreadsheet of SIT Functional and Migration tests, this spreadsheet will contain the following attributes for each test:

- SIT Stage
- Theme
- Scenario Ref
- Test Case Ref
- Test Case Version
- Segment
- MPAN Type
- Main or Paired
- Initiating Market Role
- Market Roles Involved
- No. of Test Case Steps
- Test Case Points
- Priority Grouping

During SIT execution this will be used to:

- Centrally manage the assignment of Tests to Cohort Sprints
- Track Cohort ADO project deployment
- Track the Test Case version deployed to the Cohort project
- To flag tests that are blocked for Sprint assignment due to defects
- To capture Blocked Reason Notes (i.e. Defects)
- To identify Test Cases requiring Central Party evidence
- Centrally track test case Status (updated on a weekly basis)

ADO Test Plan Structure

In Master ADO Project PPs will now see the following Test plan structure:

Location: MHHSProgramme / MHHS SIT Functional Master / Test Plans

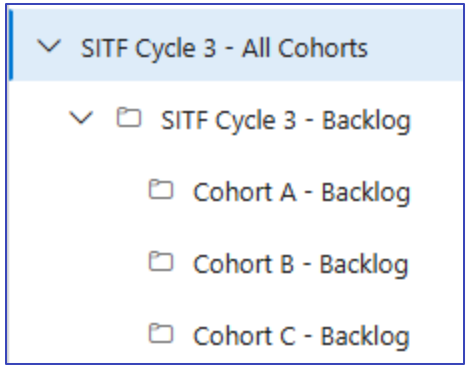
Test Plan ID	Title
23902	SIT Functional Theme 1- New Connections
23904	SIT Functional Theme 2 - Change of Registration
23906	SIT Functional Theme 3 - Change of Supplier
23908	SIT Functional Theme 4 - Change of Data
23910	SIT Functional Theme 5 - Change of Metering
23912	SIT Functional Theme 6 - Metering Changes
23914	SIT Functional Theme 7 - Consumption
23916	SIT Functional Theme 8 - Settlement
23918	SIT Functional Theme 9 - ISD
33379	Forward Migration CoA
33381	Forward Migration CoS
33383	Reverse Migration CoS
39587	SITF Cycle 3 - All Cohorts
40809	SIT Migration - All Cohorts
40811	SIT Settlement - All Cohorts

These Test Plan folders contain the full set of SIT Functional & Migration Test Cases (Grouped By Theme)

These Test Plan folders are where Cohort Sprint Execution is undertaken

Execution Test Plans

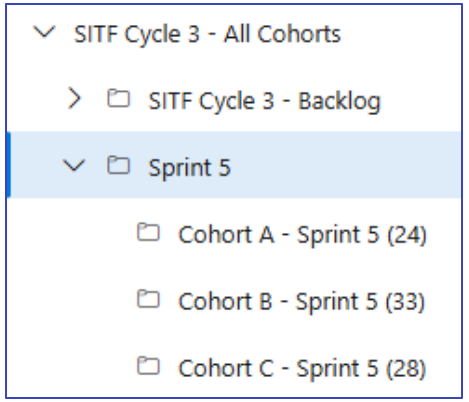
Beneath each Execution Test Plan Cohorts can see their Cohort specific backlog:



'Backlog' = All tests not assigned to the Sprint that remain for the Cohort to complete SIT

Note – Test Case defects can be proactively raised from here

Sprint Folders (Suites) are where Sprint assigned the Test Cases are executed from:



Coordinators will move Sprint assigned tests from the Cohort backlog folder into the Cohort Sprint folder

Note: Cohorts can use their backlog folder to review and prepare data requirements for upcoming Sprints

Test Case Points and Sprints

Updated for Cycle 3

'Test Case Points' scoring

- Acknowledging that not all tests are equal, tests have been given a rating based on number of test steps.
- This scoring system will be used to ensure that there is fair and balanced loading of assigned tests to each Cohort / Paired Cohort sprint.

'Test Case Points' rating:

Test Case Step Numbers	Points*
1-10 Steps	10
11- 25 Steps	20
26 - 50 Steps	40
51 - 100 Steps	80
101 - 150 Steps	120
151 - 200 Steps	160
201 - 250 Steps	200
250 + Steps**	400

***Note 1** – for paired tests, each main Cohort will be assigned with a 50% Test Points credit for each paired test

****Note 2** – due to the nature of Settlement tests they have not been assigned Points scores - Cohort estimation models assume a 20% capacity for this testing

SIT Functional & Migration Estimation Modelling:

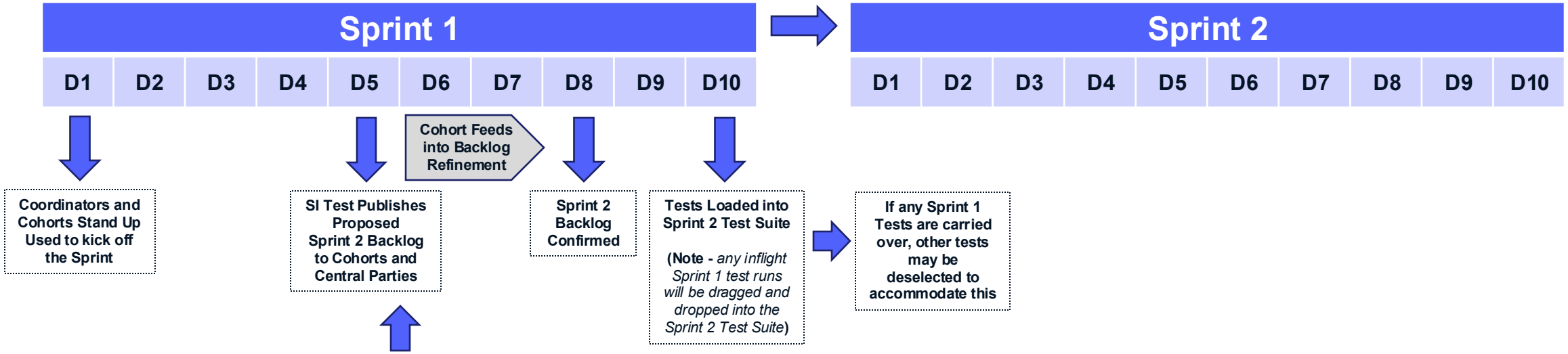
- Based on the published Cycle SIT estimation models for Cycle 3, each SIT Functional and Migration Sprint will be assigned a Test Case points target for Cohorts to achieve
- The number of Test Cases assigned to Cohort sprints will be dictated by the model points target for that particular Sprint
- A daily 'Flash Report' will enable Cohorts to track their points achievement vs. the Sprint target

Cycle 3 Sprints:

Sprint #	Settlement Start	Start	End		Points Target (SIT F & M)
Sprint 5	07/10/2024	21/10/2024	01/11/2024	**Settlement SIT-B Exit Sprints**	**1300**
Sprint 6	-	04/11/2024	15/11/2024		**1500**
Sprint 7	-	18/11/2024	29/11/2024		**1600**
Sprint 8	-	02/12/2024	20/12/2024		**2200**
Sprint 9	-	02/01/2025	17/01/2025		**1600**
Sprint 10	-	20/01/2025	31/01/2025		**1750**
Sprint 11	-	03/02/2025	14/02/2025		**1900**
Sprint 12	-	17/02/2025	28/02/2025		**1950**
Sprint 13	-	03/03/2025	14/03/2025		**2000**
Sprint 14	-	17/03/2025	28/03/2025		**2100**
Sprint 15	-	31/03/2025	11/04/2025		**-**
Sprint 16	-	14/04/2025	25/04/2025		**-**

Note – Sprint Points targets are subject to CR0055 approval and may be subject to change

The Sprint Lifecycle



Note that during Sprint execution, more tests may be brought in the Sprint if tests become blocked, or the Cohort is moving at greater velocity than anticipated

Daily Test Reports Provided for the <u>Current Active Sprint</u>
(*Note -* *this will include defects from all Cycles, Cohorts and Sprints*)

Daily Test Reports Provided for the <u>Current Active Sprint</u>
(*Note -* *this will include defects from all Cycles, Cohorts and Sprints*)

SI Test Team evaluates Sprint 1 Cohort performance against estimation model

Overall SIT Status Reporting

A full report of overall status will be provided to SIT stakeholders and FTIG, covering:

- Theme and Business Process Coverage
- Status of Priority Test Groupings
- Defects
- Cohort Overall Pass Status
- Cohort points achievement against estimation modelling

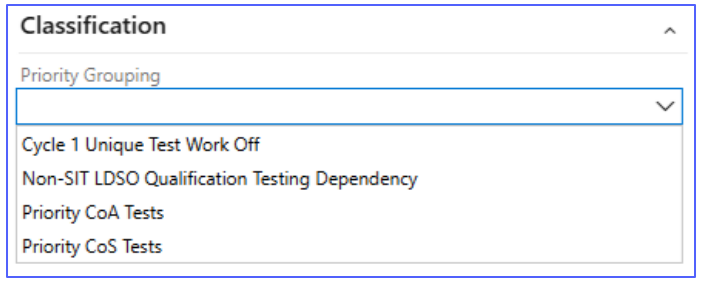
SIT Priority Objective Tests

During SIT Functional & Migration there will be certain tests that will need to executed and tracked to meet key testing objectives.

The priority groupings will be set by the Test Coordination Team in a drop-down field in the ADO Master instance and will allow the tests to be reported on when they have been selected for assignment into a Cohort Sprint

Test Stage	Priority Grouping	Notes	Reporting Frequency
SIT Functional	Priority CoA Tests	This will be a priority to complete for all Cohorts that didn't complete these in Cycle 1 (**Note** - will need to be completed by each Cohorts in the both the losing and gaining roles)	It is proposed that status reporting against these priority Groupings is provided to stakeholders in the subsequent week following each Sprint
	Priority CoS Tests	This will be a priority to complete for all Cohorts that didn't complete these in Cycle 1 – however the programme will also be seeking to balance the prioritisation of these tests across Cohorts Sprints to ensure the establishment of confidence as a summation of all Cohorts as soon as possible (**Note** - will need to be completed by each Cohorts in the both the losing and gaining roles)	
	Cycle 1 Unique Test Work Off	The load of these will be balanced across all Cohorts to ensure completion of the unique test coverage is achieved as soon as possible	
SIT Migration	Non-SIT LDSO Qualification Testing Dependency	The target for these will be a summation of all Cohort activity, as this proves the core infrastructure and will inform the decision to commence Non-SIT LDSO Qualification Testing	

Test Case 'Priority Grouping' will be set by SI Test on the Master test case Define view →

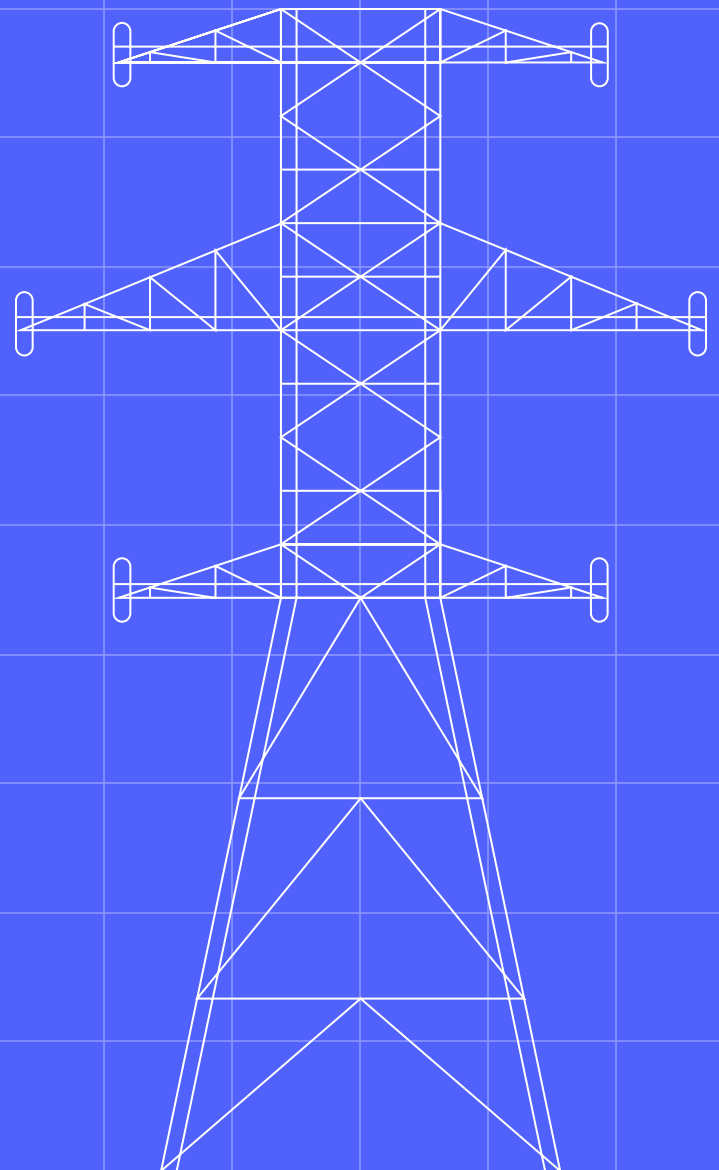


Updated for Cycle 3

Reports and Extracts

Report / Extract	Details	Frequency	Audience	Distribution Mechanism
Hourly ADO Extract	**Status of each active Sprint test including** the test order, how many steps have been executed and which party the test is currently assigned to	**Hourly**	**All SIT PPs**	**Published to Collaboration Base**
ADO Dashboards	**Test Status for all Sprints**	**Realtime**	**All SIT PP ADO Users**	**ADO**
	Test Status view for each Sprint			
	Test Case Assigned to Market Roles (All Sprints)			
Daily Report	**Test Status for Active Sprints only**	**Daily**	**All SIT PPs / MHHS Programme**	**.pdf Report and Excel Extracts uploaded to the Cohort / CP Teams Channels, with email notification**
	No. of Tests Assigned to each Market Role			
	Defect Summaries for the following Categories: • All Defects • All Central Party Defects • Per Voluntary Party • Per Workstream Sprint • Test Case Defects			
	Daily Excel Extracts (Unchanged)			
Daily Flash Reporting	**Test steps and points available for the Sprint with achievement per Cohort against these metrics**	**Daily**	**All SIT PPs / MHHS Programme**	**PowerPoint report**
Post Sprint Reports	**Same Information as daily reports, but also including:** • Status of Priority Test Groupings • Theme and Business Process Coverage • Cohort Performance against estimation modelling	**Post Sprint**	**All SIT PPs / FTIG / MHHS Programme**	**.pdf Report and Excel Extracts uploaded to the Cohort / CP Teams Channels, with email notification**

SIT Settlement Testing



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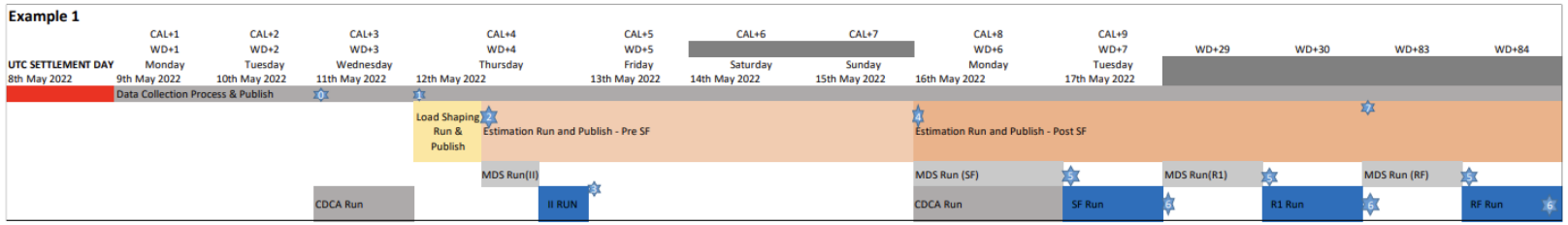
Settlement testing will prove the accuracy of settlement processing and reporting.

Key points:

- Elexon will produce a “Settlement Accuracy Input Report” which will enable PPs to compare the settlement inputs (i.e. the MPAN consumption provided, estimations etc) with the “REP” settlement reports.
- A small number of MPANs will be used to support this testing. Each Cohort will be assigned an average of 50 MPANs (400 in total), each settlement day and the subsequent runs will use these 400 MPANs.
- The MPANs will have common attributes covering Market Segments, Connection Types, Premises, Meter Types etc and their related Load Shapes and Consumption Component Classes.

To gain meaningful results we will operate the end to end systems in a ”laboratory condition” and in manner representative of the Operational Choreography design.



To support testing the following changes will be made to the read and settlement processing undertaken by Data Services and Elexon:

II run will occur settlement date(d) +2
SF run will occur d+5
RF run will occur d+8

No R1 run will occur

This will be represented in the SITB ISD “Master Settlement Timetable”

An example of the Master Settlement Calendar is provided below:

Settlement Date	WD+1	WD+2	WD+3	WD+4	WD+5	WD+6	WD+7	WD+8
Monday 10th June 2024	Tuesday 11th June 2024	Wednesday 12th June 2024	Thursday 13th June 2024	Friday 14th June 2024	Monday 17th June 2024	Tuesday 18th June 2024	Wednesday 19th June 2024	Thursday 20th June 2024
[D]	Data Collection and Publish	Load Shaping / DS Estimations II Run	Business Process Change / Data Collection and DS Re-Estimation		SF Run	Business Process Change / Data Collection and DS Re-Estimation		RF Run

Where a test case requires consumption data to be changed between settlement runs, this must occur within the two-day window between the II/SF or SF/RF runs.

Consumption and Read Processing by Data Services:

- To ensure the Load Shaping and other processes operate successfully the Programme will be providing detailed choreography requirements to PPs.

- For example, the expectation will be that at d+1 (each day for each MPAN) Data Services will generate consumption for Advanced and HH read Smart meters.

- The early stages of Settlement testing will prove that the basic choreography and business processes operate successfully for the 400 MPANs across all settlement runs, prior the execution of more complex tests (e.g. changing data between settlement runs).

Settlement Testing in SITB will start on the 10th June 2024.

The first period of the test phase will run from 10th June to the 20th June. This initial phase will be utilised as a period of stabilisation to verify:

- **Basic processing and interfaces:** Flushing out any issues such as interface schema errors, ensuring that basic settlement runs produce expected results.
- **PP utilisation of "Elexon Input Report":** Allowing PPs orientate themselves with the reporting output.
- **Embed day in the life activities:** To enable the correct operation of the settlement processes, PPs must operate the MPANs they have following the required operational chorography, for example:

1) DS submit IF-021 actual consumption, each day, for all Advanced Meters and Smart Meters with HH consents.
2) Helix to produce IF-022 and IF-023 data based on the actual IF-21 data, enabling load shapes to be used for estimation by DS for other meter types / consents.
3) DS submit IF-021 estimated consumption following receipt of load shapes from Helix.

Settlement Date	WD+1	WD+2	WD+3	WD+4	WD+5	WD+6	WD+7	WD+8
Monday 10th June 2024	Tuesday 11th June 2024	Wednesday 12th June 2024	Thursday 13th June 2024	Friday 14th June 2024	Monday 17th June 2024	Tuesday 18th June 2024	Wednesday 19th June 2024	Thursday 20th June 2024
[D]	Data Collection and Publish	Load Shaping / DS Estimations II Run	Business Process Change / Data Collection and DS Re-Estimation		SF Run	Business Process Change / Data Collection and DS Re-Estimation		RF Run

Each day the following activities will occur (in the context of the settlement calendar):

Role	When (in context to SD)	Activity	Description
Data Services	WD+1	Send IF-021 for each MPAN with an Advanced Meter or Smart HH consent meter)	The DS will generate IF-021's for the relevant meters and send to Elexon prior to the LSS run the following day.
Elexon	WD+2 (II) WD+5 (SF) WD+8 (RF)	From 00:00 hrs each day Elexon will perform the relevant settlement runs for that calendar day. Starting with the LSS run.	Refer the the SITB Master Settlement Calendar for each runs date. The relevant REPs will be produced no later than the end of that day and sent via the DIP to PPs.
Elexon	WD+2	IF-022 and IF-023 data will be sent to each DS	The DS will receive the load shapes enabling them to generate IF-021's for traditional and non HH smart meters.
Data Services	WD+2/3	The DS will send IF-021's for traditional and non HH smart meters using the load shapes provided.	IF-021's will be sent for MPANs prior to the SF run at WD+5.
Elexon	+1 WD following settlement run	Elexon will generate the "Settlement Accuracy Input Reports" for each settlement run the working day following the run date.	The "input reports" will be available to PPs via a closed access site within the Collaboration Base for each settlement run.

- The Settlement Accuracy Input reports are generated for each settlement run triggered in each service (LSS, MDS, VAS). Settlement run, in this context, refers to an execution of a settlement date by a particular service.
- Each service (LSS, MDS and VAS) will produce an individual accuracy input report that includes all the data used in its own settlement run.
- Each worksheet in these Input Accuracy reports represents a dataset that is ingested separately and validated by the respective service. The data presented in each worksheet includes only data items that have been included in the settlement run and used in the calculation stage.
- Worksheet names denote the name of the datasets in familiar language. Most of the columns represented in each worksheet refer to known data items described in MHHS interface catalogue.
- LSS contains a specific worksheet (BusinessValidationSettings) related with configured business validation settings used in the LSS settlement run.
- MDS contains a specific worksheet (ALL INPUT MAPIINGS) that links/maps all the datasets loaded in the run.
- To verify all the input data used for a settlement date, the individual Accuracy Input reports for each service should be analysed for each settlement run. These inputs can be used by the user to generate outputs that can be reconciled with the reports (ex: External ECS reports or other published IFs) produced by the settlement runs executed by each service. The calculations for each service are listed in the corresponding method statements.
- The Accuracy Input files will be dropped by Helix team members in a shared folder at the end of each successful run, where MHHS stakeholders can access and download the reports on settlement run date + 1 business day.
- The file structure will include the service name, a settlement date, a run type and a correlation ID.
- Example: SIT Settlement Accuracy Reports > LSS > II > 20240521 > 45e5538f-a05b-4fd3-b624-09109cdda37f > LssReport.xlsx

- Access to the reports will be via the Collaboration Base.
- Only authorised named users (using their @mhhsprogramme accounts) will be able to access the site. Please contact testing@mhhsprogramme.co.uk to request a user access to the Collaboration Base page.
- For each settlement run, Elexon will upload the reports to the library on that page, by the following working day.
- The location of the page will be:

Collaboration Base>testing>data>Input reports

MPRS:
Data will be provided in .CSV file format and the following industry message formats: DB02, DB05, CSS2860, D0312, IF-031, IF-034.

Supplier:
Data will be provided in .CSV file format and IF-036

MS and DS:
Data will be provided in .CSV file format and IF-033 and IF-036

CSS/DSP:
N/A

LDSO/UMSO:
Data will be provided in .CSV file format and the following industry message formats: DB02, DB05, CSS2860, D0205, D0312, IF-031, IF-034.

DIP:
Data will be provided in .CSV file format and IF-031, IF-034, IF-036

Elexon:
Data will be provided in .CSV file format and IF-036

ESS:
Data will be provided in .CSV file format and IF-036

- In total 400 MPANs will be utilised for Settlement Testing across all Cohorts, each test case will be assigned an MPAN, the same MPAN can be utilised to support more than one test case. Each MPAN will be assigned a unique ID which in turn will be assigned to a test case(s).

- This table shows the unique MPANs (and attributes) that will be created for each Cohort, which will cover the scope of all SITB settlement tests.
- For SITB, all MPANs utilised will be within the _H GSP as this is the SOUT DNOs “home” GSP.
- All BUUK IDNO MPANs will be ”embedded” within the SOUT distribution network within this GSP.

SITB MPAN REF	MPAN	Linked Suppliers	Domestic?	Consents	Conn Type
T001	Traditional Import		Any	N	W
S001	Smart Import		Any	H	W
A001	Advanced Import		F	H	<> W
A002	Advanced Export		F	H	<> W
S002	Smart Import/Export	Same	Any	H	W
S003					
S004	Smart Import/Export	Different	Any	H	W
S005					
U001	Unmetered Import		F	H	U
T002	Traditional Import E7		Any	N	W
A003	Advanced Import Reactive Power		F	H	<> W
S006	Smart Import		Any	M	W
T001	Traditional Import		Any	N	W
A004	Advanced Import		F	H	<> W
S001	Smart Import		Any	H	W
U001	Unmetered Import		F	H	U
T003	Traditional Export		Any	N	W
T004					
S003	Smart Export		Any	H	W
A005	Advanced Import		F	H	<> W
S007	Smart Import		Any	D	W
A006	Advanced Import		T	D	W
S002	Smart Export		Any	H	W
A004	Advanced Import		F	H	<> W
U001	Unmetered Import		F	N	W
T005	Traditional Import [Energised]		Any	N	W
A006	Advanced Import [Energised]		T	D	W
S006	Smart Import [Energised]		Any	M	W
A007	Advanced Import [De-Energised]		T	M	W
U002	Unmetered Import [De-Energised]		F	H	U
S008	Smart Import [De-Energised]		Any	M	W
S009	Smart Import [De-Energised]		Any	M	W
S001	Smart Import		Any	H	W
A001	Advanced Import		F	H	<> W
A002	Advanced Export		F	H	<> W
U001	Unmetered Import		F	H	U
S010	Smart Import [De-Energised]		Any	M	W
A008	Advanced Import		T	M	W
T006	Traditional Import		F	N	W
S011	Smart Import		Any	H	W
A009	Advanced Import		F	H	W
A001	Advanced Import		F	H	<> W

New for Cycle 3

SIT Settlement Testing Rationalisation for Cycle 3

- **Settlement testing to recommence on 7-Oct-24** until **20-Dec-24** (11 weeks)
- **Review of Settlement Test Cases for execution in Cycle 3 has been completed**
- **Provides greater clarity on scope and exit criteria targets**
- **Outcome**,
  - Scope updated to consist of **41 Test Cases** and *9 Optional Tests Case* => ***37 Test Cases to be completed by 20-Dec-24***

(4 CoS TCs deferred to SIT-A in April '25)

Notes for Optional TCs

- Optional for execution is a choice available for each cohort, based on their own approach to the required scope of settlement testing, providing the required level of confidence for each cohort.
  - All Mandatory Tests shall be prioritised over these optional tests and these will only be made available once all mandatory tests have been completed.
  - These optional TCs shall not form part of the SIT-B Settlement Exit Criteria and should be considered as time bounded TCs.
  - Where Cohorts choose to execute these Optional TCs, this needs to factored into the set up and execution time for Settlement Testing to ensure that they are completed by the end of Settlement Testing in SIT-B
  - Any optional TCs not run by cohorts before the end of SIT-B will be considered as 'timed out' and would not be rescheduled in later cycles.
  - Of the TCs, removed from scope
    - From a Programme perspective
      - Design and requirements coverage remains the same without executing these TCs
    - From a Participant perspective
      - No unique requirements identified in these TCs that would have negative impact on coverage or PP Qualification

Example – Optional TC

- We want to focus test execution on a core set of settlement accuracy tests
- Whilst reviewing the TCs within the **Settlement Accuracy Tests (SET 2)** category several TCs have been identified as being considered to be not directly required to provide assurance/confidence that the Settlements process is working as expected.
- Some TCs are either, similar tests to other existing TCs or variant TCs of a main TCs, so provide limited additional assurance/confidence.
- Example – 2 TCs currently defined for ***ST0031 - MDS DDE Reporting***
  - ST0031 TC01 - MDS DDE Reporting - Advanced Metering
  - ST0031 TC02 - MDS DDE Reporting - Smart and Unmetered
    - This TC is a variant of the main TC01 which provides assurance / confidence for the requirement
    - Main scenario for DDE is Advanced Metering
    - Same process and MDS reports created and sent out - Variants are for different MPANs in different market segments.
    - Test preparation activity is carried out by PPs within each cohort so this should be a consideration for each cohort
- **Outcome - Make these TCs 'Optional' for execution by each cohort**

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Settlement Testing - Test Case Execution

Optional Test Case

Total Settlement Test Cases **41** +9

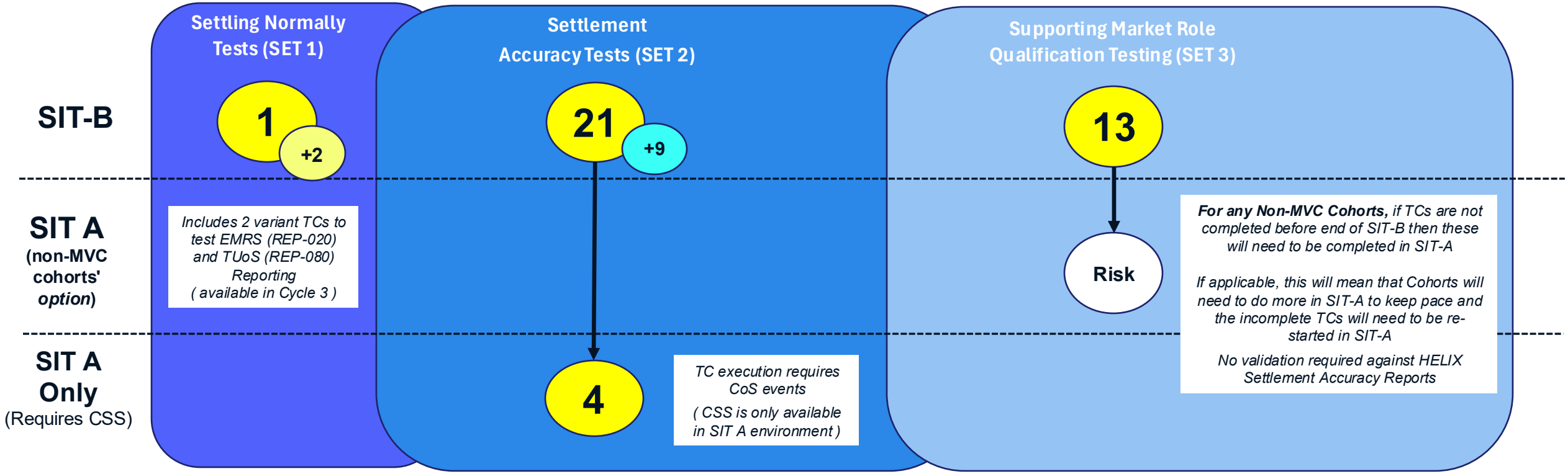
spread across 3 Main SETS and 18 Sub-SETS

Key Planning Assumptions

- Settlement Testing will continue until the end of the year using the SIT-B environment
- SIT-A environment is required to complete testing for execution of TCs that require CoS Events, scheduled for completion prior to SIT-F Regression Cycle

TC execution requires HELIX Settlement Accuracy Input Reports for validating the new MHHS Settlement Output Reports

Market Role Coverage TCs do not require HELIX Settlement Accuracy Input Reports for validating the new MHHS Settlement Output Reports



New for Cycle 3

Settlement Testing - Test Execution Coverage (Sets & Categories) & Exit Criteria

Set	Test Objective	Reason for Testing	No. of Test Cases	Test Environment	Exit Criteria – - Number of Cohorts Required to complete Test Cases
1	**Settling Normally Test**	**Testing the MHHS Programme E2E Design** - Integrity and accuracy of Elexon Central Settlement Systems, including Helix internal and output accuracy checks, Supplier and LDSO output report accuracy checks successfully tested - One Main TC and 2 Reporting Variant TCs (Helix/EMRS/ESO only tests)	**3**	SIT-B	Min 2 cohorts (Any 2, doesn't have to be MVC candidates)
2	**Settlement Accuracy Tests**	**Testing the MHHS Programme E2E Design** -As per Test set 1 + Additional coverage of key events that can impact reported consumption totals, and critical parameters such as Consumption Component Class, from one Settlement run to another, or from one Settlement day to another TC execution requires HELIX Settlement Accuracy Input Reports for validating the new MHHS Settlement Output Reports	**21**	21 in SIT-B 4 in SIT-A (Requires CSS)	**Each cohort only runs a Sub-set of these TCs and NOT all of them** Min 2 cohorts (Any 2, doesn't have to be MVC candidates) Min 2 MVC candidates
3	**Supporting Market Role Qualification Testing - Non-Accuracy Tests**	**Supporting Qualification Testing** Any additional Settlement Test Cases that are required to be run to provide Test Coverage by Market Role (Data Services) to support Qualification Testing • Note - If required, These Test Cases can be run in the SIT-A environment	**13**	SIT B --- SIT A *(contingency for non MVC)*	Min 2 MVC candidates All 8 Cohorts required to execute each TC to ensure that each Data Service passes each Test Case to support their Qualification Testing evidence.

	Proposed criteria for targets, based on '<u>minimum viability</u>' for end of Settlement Testing in <u>SIT-B environment</u>
Settlement Testing ***(subset of SIT Functional)***	• Completion, ***by any 2 Cohorts***, of **3 Settling Normally Tests** (SET 1) and • Completion, ***by any 2 Cohorts***, of **21 Settlement Accuracy Tests** (SET 2) and • Completion, ***by min 2 MVC candidates***, of **13 Market Role Qualification Tests** (SET 3)

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New for Cycle 3

Settlement Testing - Test Case Execution Coverage Sets and Sub-Sets

41 +9

Optional Test Case

Settling Normally Tests (SET 1)

ST0030 TC01 - Settling Normally

ST0030 TC02 - EMRS Reporting
- HELIX and EMRS only
  - (Data Service - Passive)

ST0030 TC03 - TUoS Reporting
- HELIX and ESO only
  - (Data Service - Passive)

1 +2

spread across 2 Sub-Sets

Settlement Accuracy Tests (SET 2)

5 TCs - Available to run ay any point by each cohort as they do not involve aggerated consumption checks

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ST0090 TC01 - Annual Consumption
ST0090 TC02 - New Connections Annual Consumption
ST0090 TC03 - De-energised Annual Consumption
ST0090 TC04 - Smart Reenergisation Annual Consumption
ST0090 TC05 - Advanced Reenergisation Annual Consumption

ST0031 TC01 - MDS DDE Reporting - Advanced Metering
ST0031 TC02 - MDS DDE Reporting - Smart and Unmetered

ST0032 TC01 - Settling during Clock Changes – Autumn BST to GMT *[Not before 28-OCT]*

ST0033 TC01 - Settlement Central Systems Re-runs - Settlement Re-Runs
ST0033 TC02 - Settlement Central Systems Re-runs - VAS Audit Re-Run

---

16 TCs – ONLY 1 of the following 7 SETS of Test Cases can be run by each cohort at any point in time as they involve aggerated consumption checks.

ST0012 TC01 - Change of Meter - Traditional to Smart Meter Exchange
ST0012 TC02 - Change of Meter - Advanced to Advanced Meter Exchange
ST0012 TC03 - Change of Meter - Advanced to Advanced Meter Exchange Back-Dated
ST0012 TC04 - Change of Meter - Traditional to Smart Meter Exchange using Back-Stop Reading

---

ST0014 TC01 - Advanced to Smart Market Segment Change
ST0014 TC02 - Smart to Advanced Market Segment Change

ST0015 TC01 - De-Energise
ST0015 TC02 - Retro Energise
ST0015 TC03 - Smart BkStp Energise

ST0016 TC01 - CT-Metering to Whole Current Change
ST0016 TC02 - Advanced (Whole Current) to Advanced (CT-Meter) Connection Type Change

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ST0020 TC01 - Read Adjustments

ST0054 TC01 - Update DUoS Tariff ID

ST0055 TC01 - Trad Override
ST0055 TC02 - Adv Override
ST0055 TC03 - Smart Cons Amend
ST0055 TC04 - Adv Cons Amend
ST0055 TC05 - Smart Export Cons Amend
ST0055 TC06 - Smart Override No Re-Calc
ST0055 TC07 - Adv Override No Re-Calc

21 +9

spread across 11 Sub-Sets

Supporting Market Role Qualification Testing (SET 3)

ST0037 TC02 - Consumption settling against De-Energised MPANs - Advanced
ST0037 TC03 - Consumption settling against De-Energised MPANs - Unmetered
ST0037 TC04 - Consumption settling against De-Energised MPANs – Trad / Smart

---

ST0050 TC01 - Impacts by IF-024 Supplier Advisory Notifications to DS - Trad SNAC
ST0050 TC03 - Impacts by IF-024 Supplier Advisory Notifications to DS - Trad LTV
ST0050 TC04 - Impacts by IF-024 Supplier Advisory Notifications to DS - Smart Disabled
ST0050 TC05 - Impacts by IF-024 Supplier Advisory Notifications to DS - Smart Off-Peak E10
ST0050 TC06 - Impacts by IF-024 Supplier Advisory Notifications to DS - Trad LTV Expires
ST0050 TC07 - Impacts by IF-024 Supplier Advisory Notifications to DS - Adv LTV Expires

---

ST0053 TC01 – MDS D0297 MPAN_ABMU Mapping – Smart/Advanced

ST0070 TC04 - Consumption for LSS Rejection and Default - Adv LS Default
ST0070 TC05 - Consumption for LSS Rejection and Default - Unmetered LS Default
ST0070 TC09 - Consumption for LSS Rejection and Default - Smart LS Default

---

13

spread across 4 Sub-Sets

SIT-A CoS Events

SITFTS-ST0040 COS only or COS with change of Metering Service and/or Data Service where Settlement is working prior to and after the COS
- ST0040 TC01 - Trad Related
- ST0040 TC02- Smart Single
- ST0040 TC03- Adv Single
- ST0040 TC04- Unmetered

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Settlement Testing – Priorities for Test Case Execution – Direction of Travel

Background *- Settlement Testing and specifically the accuracy tests were created to provide PPs with confidence the Settlements process is working as expected.*

Priority	Sets	Objectives
1	**Settling Normally** Test Case (SET 1)	Completion, ***by any 2 Cohorts***, to provide Design Coverage and Confidence
2	**Settlement Accuracy Tests** (SET 2)	Completion, ***by any 2 Cohorts***, of each SET 2 tests: • Note - The aggregated consumption tests need to be run in isolation of any other settlement test, per Supplier • Each cohort will be allocated a set of the TCs that involve 'aggregated consumption checks' to execute. Once completed another set will then be allocated. • Additionally, alongside the aggregated consumption checks TCs being run these other 'non aggregated consumption' will be executed.
	Settling Normally Test Case (SET 1)	Completion, ***by remaining Cohorts***, of SET 1, so that all Cohorts complete this TC to ensure their requirements test coverage
3	**Market Role Qualification Tests** (SET 3)	Completion, ***by min 2 MVC candidates***, of the SET 3 tests: • All TCs to be made available to all Cohorts to execute • Objective and Target is that ALL cohorts should complete these TCs in SIT-B
4	**Settlement Accuracy Tests - Optional TCs** (SET 2)	• Not applicable as part of SIT-B Exit Criteria

New for Cycle 3

SIT Settlement Testing – TC Scheduling Principles - *The 11 weeks will be a busy period*

- **Set 1 - Settling Normally Test**
  - Single ST-0030 TC allocated to ALL cohorts for completion ASAP - Target in Week 1 (remains the sole TC allocated)
  - *RISK - Further delays in completion of this TC will put cohort AT RISK of not completing all the required Settlement Test Cases by end of the year*
  - Remaining +2 TCs are primarily for execution by HELIX and EMRS /ESO only (Supported by cohorts by request)
  - *RISK – There are 4 Output Reports that we are awaiting confirmed delivery dates from HELIX (REP-003A,REP-007,REP-020 and REP-080) that were expected for the start of Cycle 3. Depending on the delivery date provided, there may be an additional risk relating to completing Settlement testing in the time available.*
- **Set 2 – Settlement Accuracy Tests**
  - Test Cases will be allocated by the programme alongside ST-0030 from week 2 onwards regardless of progress made against ST-0030 in order to mitigate against time line completion risk
  - There is no requirement for each cohort to run each of these TCs over the 11-week period
    - Each TC allocated to a min of 4 cohorts to achieve PASS by at least 2 cohorts by the end of the 11-week period
  - Each Cohort will be asked to run at least 3 sub-sets of '*Aggregated Consumption Check*' TCs over the 11-week period
  - Each Cohort can ONLY run 1 sub-set of '*Aggregated Consumption Check*' TCs test at a time – can't run concurrently with a different sub-set
    - This is to mitigate the Risk of too many simultaneous changes being made making output report checking / reconciliation more complex
    - *Note – TC variants within a sub-set (e.g. ..01-02-03 etc) can be run alongside each other*
  - Optional TCs in this SET will ONLY allocated to a cohort once they have completed all their allocated Mandatory TCs and the programme considers that good progress is being made by all cohorts against these SET 2 TCs
  - Note – TC ST0032 is a time dependant TC so can only occur post Clock change event (w/c 28-oct)
  - *RISK – All cohorts to ensure the appropriate resource level and skillset available to support the accuracy checks within the 11 week period*
- **Set 3 - Supporting Market Role Qualification Testing**
  - Each TC allocated to ALL cohorts to achieve a PASS by the end of the 11-week period
    - *Note – Only a small number of the these TCs can be run alongside the Set 2 'Aggregated Consumption Check' as TCs that change consumption data need to be run separately.*
      - *RISK - if TCs are not completed by a cohort before end of the 11-week period then these will need to be completed in SIT-A in '25*
        - This will mean that the cohort will need to do more in SIT-A to keep pace and the incomplete TCs will need to be re-started in SIT-A

New for Cycle 3

SIT Settlement Test 'Priority Groupings'

For Settlement Testing objective tracking and reporting purposes, Settlement tests have been assigned one of new set of Priority Groupings in ADO:

Test Stage	Priority Grouping	# of Test Cases
SIT Functional Settlement	SET 1 - SIT-B Exit (Design Coverage = Any 2 Cohorts / MR Req = All)	1
	SET 1 - SIT-B Exit (Design Coverage = Helix / EMRS)	1
	SET 1 - SIT-B Exit (Design Coverage = Helix / ESO)	1
	SET 2 - Optional	9
	SET 2 - SIT-A (CSS Req'd / MR Req = Completed by All Cohorts)	4
	SET 2 - SIT-B Exit (Completed by any 2 Cohorts)	21
	SET 3 - SIT-B Exit (Full SET Completed by min 2 MVC Cohorts)	13
		50

New for Cycle 3

SIT Settlement Testing – Key Messages

- SIT-B Settlement Testing will be spread over 4 Sprints (11 Weeks):

Sprint #	Settlement Start	C3 Start	End	
Sprint 5	07/10/2024	21/10/2024	01/11/2024	**SIT-B Exit Sprints**
Sprint 6	-	04/11/2024	15/11/2024	
Sprint 7	-	18/11/2024	29/11/2024	
Sprint 8	-	02/12/2024	20/12/2024	

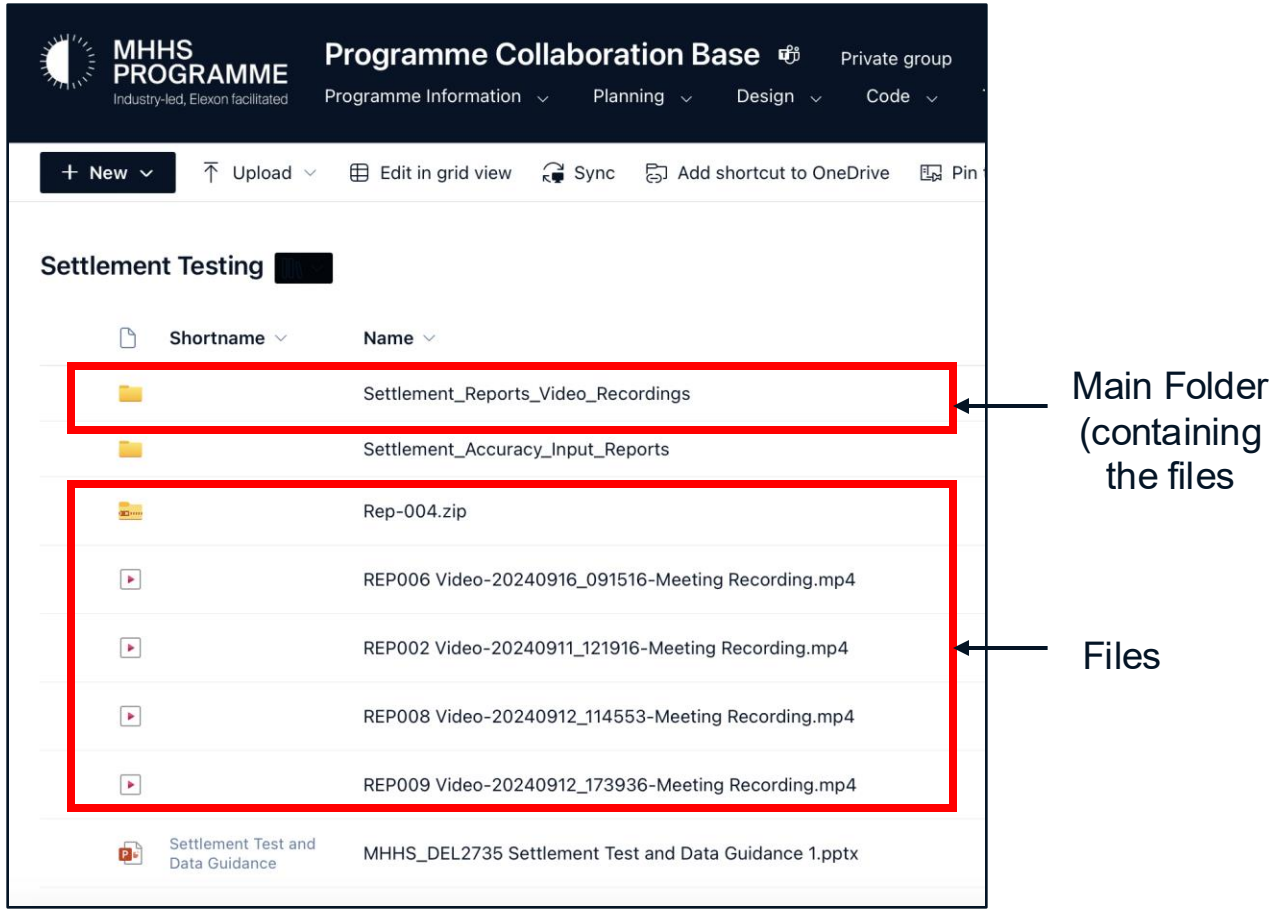
- Cohorts should plan to be assigned approx. 25 (of 37) SIT-B Tests in this period (Note for SET2 this will be a dynamic assignment based on progress across all Cohorts)
- **Sprint 5:**
  - Cohort Test Assignments will be shared in the Cohort prep-Stand Ups on Fri 4th
  - Cohorts will need to aim to complete ST-0030 'Settling Normally' in Week 1 to maintain the velocity required for the 11 weeks
- Daily Settlements Testing stand ups will be chaired by the Programme from Thursday 10th (12:30pm)
  - This will be an opportunity for Cohorts to raise issues and queries relating to the SIT-B settlement testing
  - Helix and Cohort Team members involved in Settlement Testing must attend (Coordinators to confirm Cohort attendance)

Settlement Reports Guidance Videos

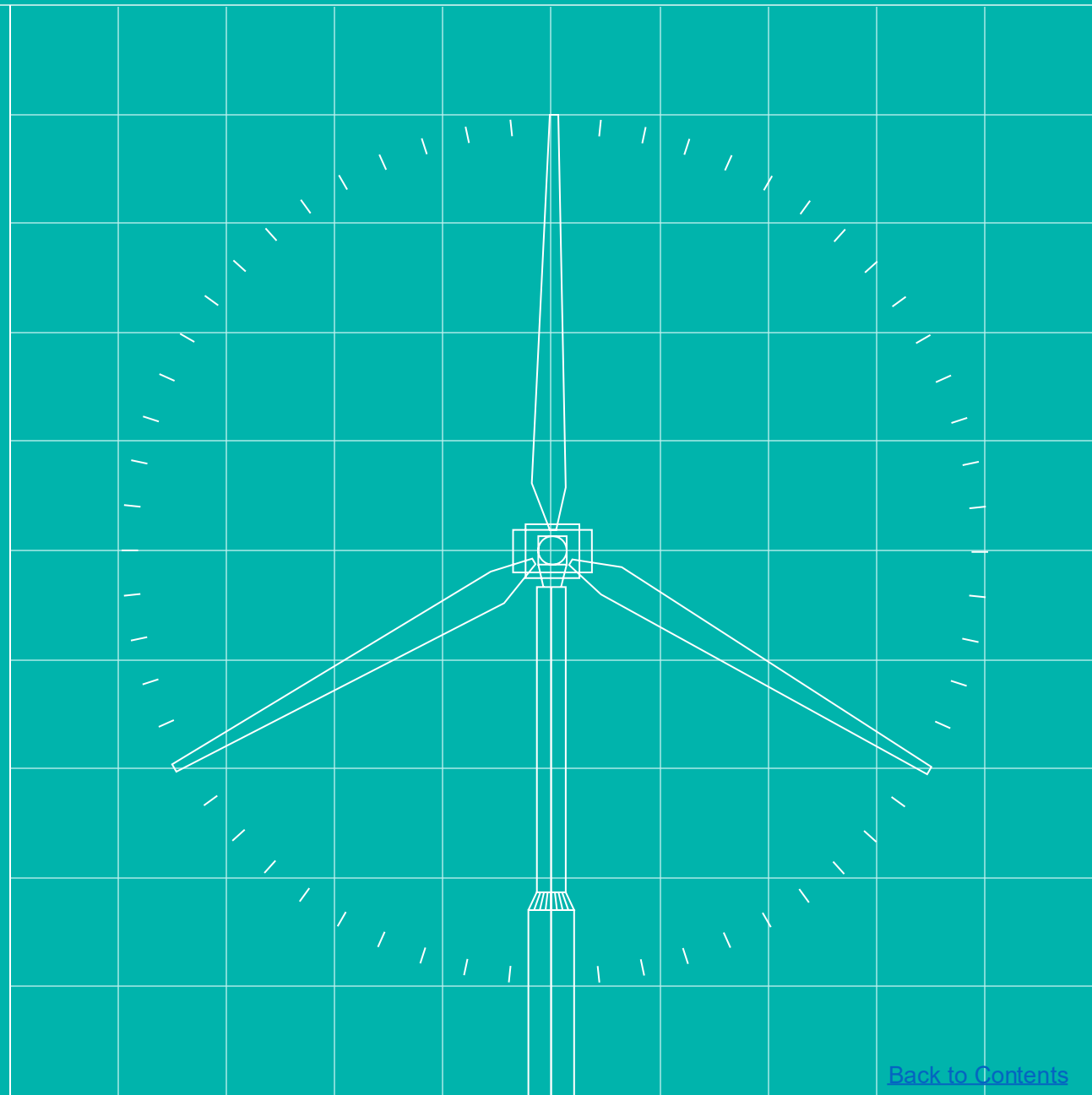
Guidance Videos have been created by the HELIX team to assist PPs with checking / reconciliating between the Settlement Accuracy Input Reports (SAIRs) and the Settlement Output Reports (REPs).

These are available from with a secure location within the Collaboration Base. They sit alongside the folder containing the Settlement Accuracy Input Reports (SAIRs).

Access is controlled by the PPC team and access can be granted by the PPC team for any SIT PP who requires these to support SIT Settlement Testing.



Test Execution



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Process for Participants Executing and Handing Over a Test Case

Updated for Cycle 3

Participant A Triggering Test Cases

Pre-Reqs:
1. You have confirmed which tests to run for the day in your Cohort Stand Up
2. PPs will be able to see their Cohort Sprint allocation in ADO to identify the test cases to be run

PP A (Initiating PP) identifies test data to use for the test in the MPAN Allocation Tool *(See slide)*

PP A starts the test run in ADO and validates the test condition

PP A Begins step 1 of test case entering a Comment into Test Step 1 to include MPAN-References (or Settlement Date for Settlement Tests)

PP A executes owned steps successfully in ADO and attaches evidence to the final step *(see instructions)*

If test case fails on any steps owned by PP A. PP A will raise a defect in ADO and attach evidence *(see instructions for evidence upload)*

PP A marks test steps in ADO as passed and Pauses test in ADO *(see instructions)*

TIP: If you do not 'Pause' the test case before you Save & Close, the test will be marked as failed in ADO.

If test case fails PP will notify Cohort via Teams channel using Teams Channel *(see instructions)*

PP A assigns test case to PP B by selecting the relevant role in ADO *(see instructions)*

Marks Test Steps in ADO as Failed

Participant B Resuming Paused Test Cases

PP B identifies test case assigned by PP A in ADO *(see instructions)*

PP B Resumes Paused Test Case *(See instructions)* and identifies the MPAN-Reference in step 1

PP B executes owned steps successfully in ADO and attaches evidence to the final step *(see instructions)*

If test case fails on any steps owned by PP B. PP B will raise a defect in ADO and attach evidence *(as per instructions for evidence upload)*

PP A marks test steps in ADO as passed and Pauses test case in ADO *(see instructions)*

If test case fails PP will notify Cohort via Teams Channel *(see instructions)*

PP B assigns test case to PP C by selecting the relevant role in ADO *(see instructions)*

Marks Test Steps in ADO as Failed

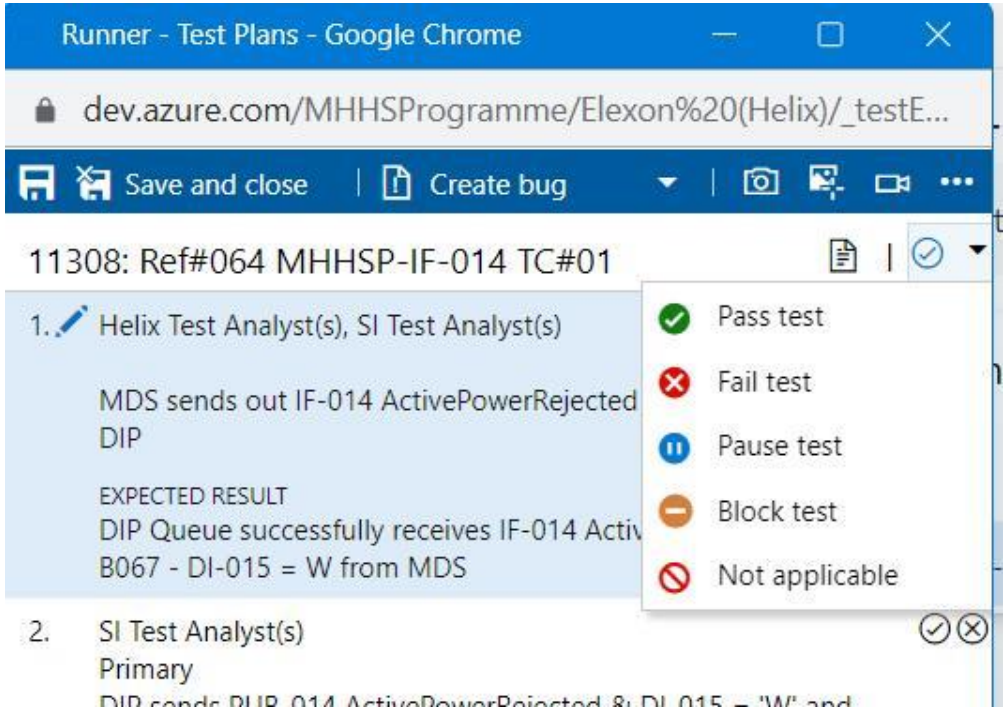
Process begins again with PP C, D, E, F… etc..

Executing Tests in ADO: how we can pass tests back and forth cleanly

When you run tests in ADO and want to pass it over to another team to continue:

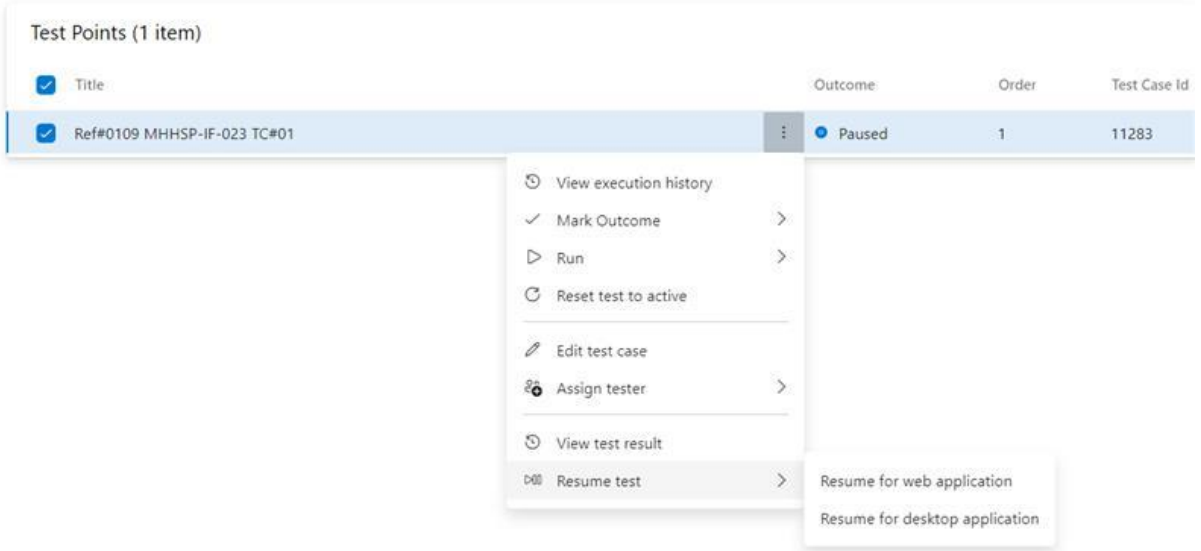
1. Before you Save and close use the drop down on the right and select 'Pause test' (see below)
2. Once you have Paused the test you can Save and close

➢ **TIP:** This will stop the test going into a failed state and allow teams to pass tests back and forth adding evidence and passing steps correctly



When you are resuming a test that:

1. Click the 3 dots
2. Select -> resume test
3. Select -> resume for web application

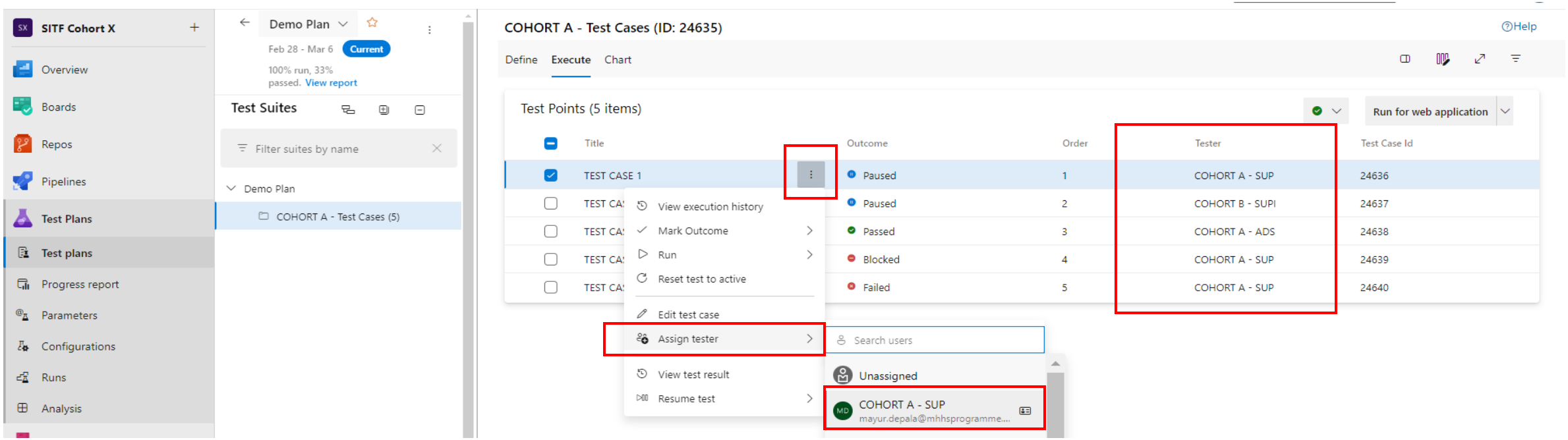


Executing Tests in ADO: how to assign a 'Paused test' to another team

When you have paused a test, and want to hand it over the test case to the next Participant team to execute in the business process under test, you can do this by:

1. In the Test Plan area, highlight the test case to be handed over
2. Open the menu by **Clicking the 3 dots**
3. Go to the **Assign Tester** option
4. **Select the participant Market Role** you want to assign the test case to as per the next steps in the test case
5. You will then be able to see the allocated **participant Market Role** in the test plan Execute list view of Cohort test cases (which can also be filtered by Market Role(s) if needed)

NOTE – All PP Market Roles that are in your Cohort will be available from the drop-down list. In the case of paired cohort ADO instances, you will be able to select the PP Market Role identifying by your main cohort.



Go to: 'How to identify which Paused test cases have been assigned to you'

Executing Tests in ADO: How to identify which Paused test cases have been assigned to you

How to identify which Paused test cases have been assigned to you within an ADO Cohort or Paired Cohort instance:

Either in the Execute view Using the hourly report, you can identify the test cases that are allocated to your role and in a paused status using filters.

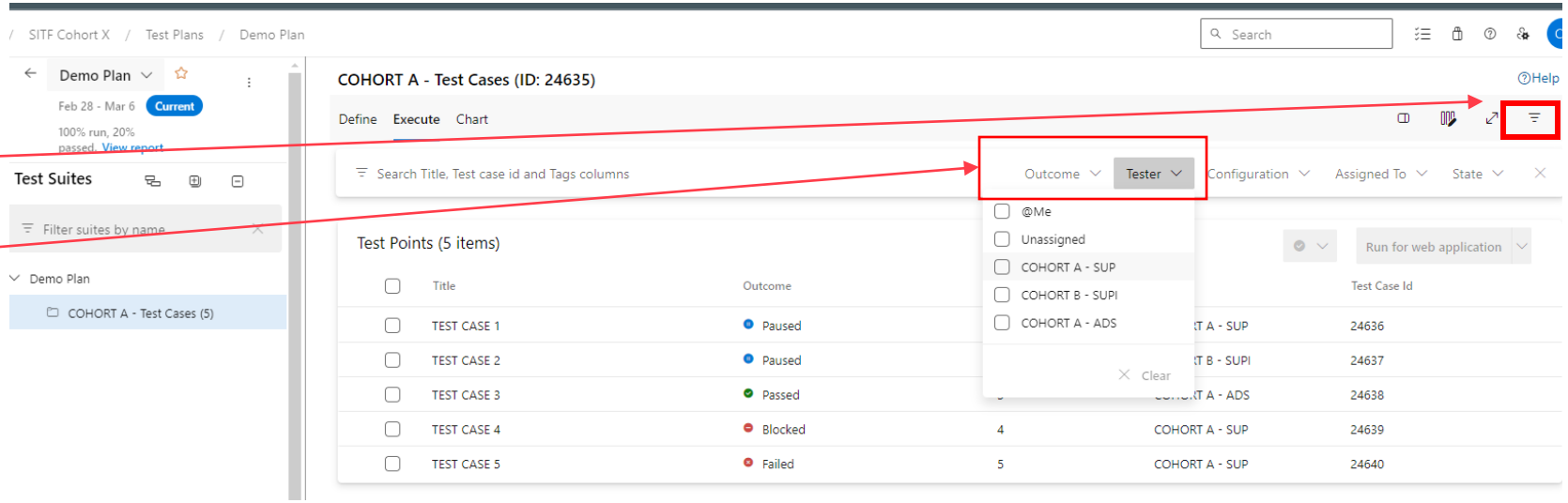
The hourly report can be found Here

1. Open the latest version of the hourly report
2. Apply filters to “overall outcome” selecting “Paused”
3. Apply relevant filters to “assigned to”
4. A list will show the Test plan and Test Suite that the test belongs along with test case Id

project_name	plan_name	suite_name	mpan_t	meter_t	test	ado_test_ca	order_w	test_case_name	overall_outcome	assigned_to	total
MHHS SIT Functional Master	SIT Settlement - All Cohorts	Cohort E - Sprint 5	Multiple	Traditional	ST003(	41316	1	ST0030 TC01 Settling Normally	Paused	CentralParty.Helix	
MHHS SIT Functional Master	SIT Settlement - All Cohorts	Cohort C - Sprint 5	Multiple	Traditional	ST003(	41316	1	ST0030 TC01 Settling Normally	Paused	CentralParty.Helix	
MHHS SIT Functional Master	SIT Settlement - All Cohorts	Cohort B - Sprint 5	Single	Advanced	ST001(	36950	2	ST0016 TC01 CT Metering to Whole Current Cl	Paused	CentralParty.Helix	
SITF Cohort C	SIT Functional Settlement	Sprint 4.2	Multiple	Traditional	-	36457	1	ST0030 TC01 - Settling Normally	Paused	CentralParty.Helix	
SITF Cohort E	SIT Functional Settlement	Sprint 4.2	Multiple	Traditional	-	36964	1	ST0030 TC01 - Settling Normally	Paused	CentralParty.Helix	
SITF Cohort G	SIT Functional Settlement	Sprint 4.2	Multiple	Traditional	-	36967	1	ST0030 TC01 - Settling Normally	Paused	CentralParty.Helix	
SITF Cohort J	SIT Functional Settlement	Sprint 4.2	Multiple	Traditional	-	36985	1	ST0030 TC01 - Settling Normally	Paused	CentralParty.Helix	

You can individually view your allocated test cases and status if you **filter** your test cases in Test Plan:

1. Clicking the **filter** button in the Test Plan area
2. Filter by **Tester** or **Outcome** or both to allow you to identify the test cases that are currently assigned to your Market Role and the outcome (status) as desired



Note: All parties will also be provided with a separate extract report which identifies assigned tests from all Cohorts.

Return to: ‘Process for Participants executing and Handing Over a Test Case’

Process for Participants Re-Running a Failed Test Case

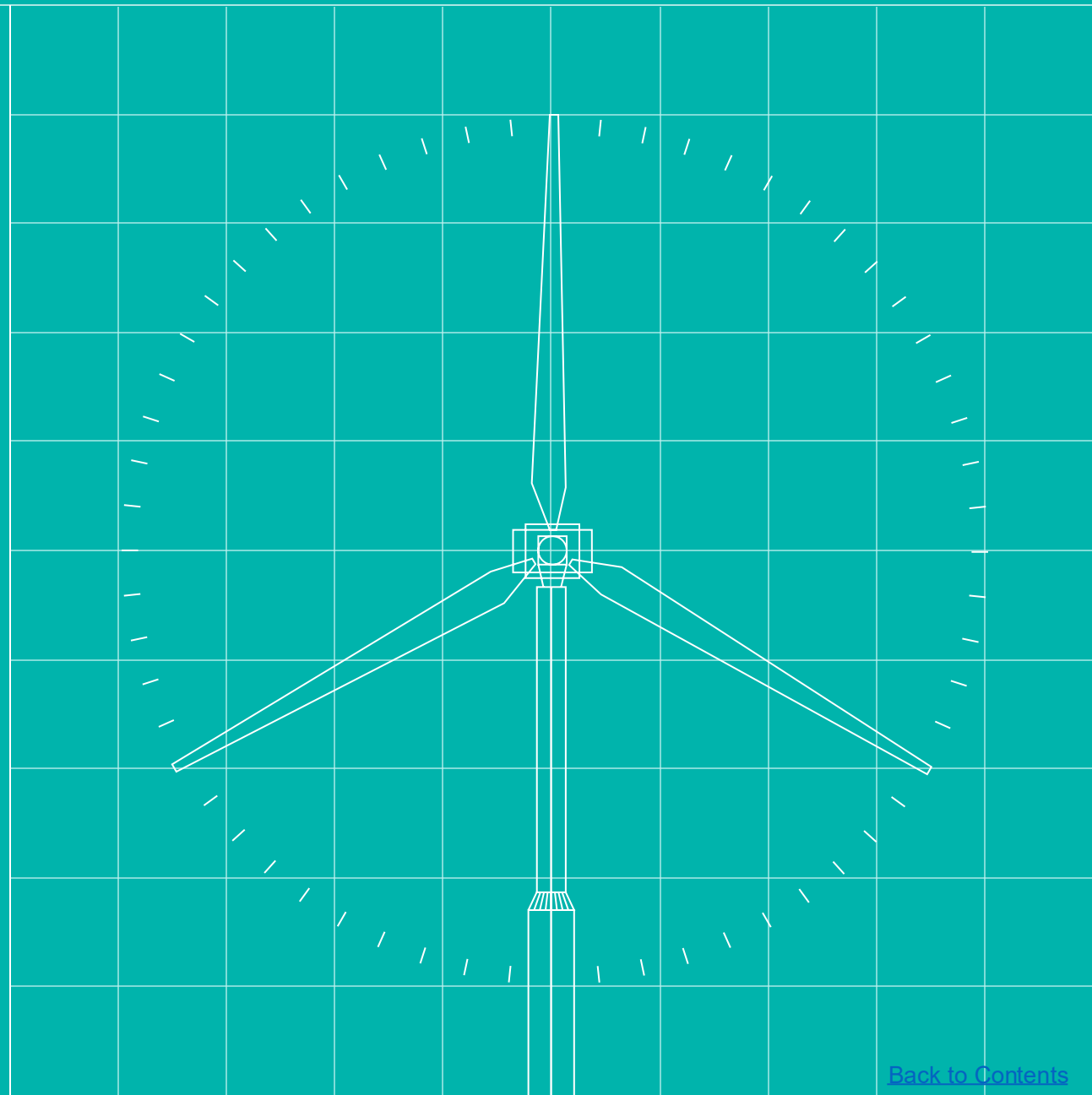
Participant Re-running a Failed Test Case From Point of Failure

PP has failed a test case in ADO and raised a defect → Defect is resolved and test case can be resumed from the failed step → PP starts a new run of the failed test in ADO → PP collates all evidence from the previously failed test case run and reattaches to new run *(See instructions)* → PP re-executes owned steps in ADO, retest passes, PP attaches evidence to the final step *(see instructions)*, → PP marks test steps in ADO as passed and Pauses test in ADO *(see instructions)* → PP assigns test case to next PP by selecting the relevant role in ADO *(see instructions)*

Else;

If test case fails on any steps owned by PP, PP will either mark the defect as Failed Retest or raise a new defect in ADO in the event of a new failure, attaching evidence *(see instructions)* → If test case fails PP will notify Cohort via Teams Channel *(see instructions)* → Marks Test Steps in ADO as Failed

Test Data



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About the Excel MPAN Tracking Tool

- The Excel MPAN Tracking tool will enable participants to select an MPAN reference and mark it as “in use” against a Test case refence
- Participants will also be able to enter notes against an MPAN reference
- Participants will be able to fill in excel fields that are not shaded
- The Programme will be able to view MPANs in use and track volumes used by participants

How to access the Excel MPAN Tracking Tool

- The Excel MPAN tracker will be hosted in Microsoft Teams MHHS Environment
- Participants must have an active MHHS license and must then join the Microsoft Teams Group titled *'MPAN Tracking Tool for SIT Functional*’. Participants should click ‘Join’ when prompted after following the link below:

  MPAN Tracking Tool for SIT Functional | General | Microsoft Teams

- The link provided will take you only to the MS Teams site not the document
- The file MPAN Tracker is held under ‘Files’ and as a tab in the MPAN tracker Microsoft Teams site – it can be accessed either way.
- Please only update the spreadsheet in the team’s location as this will avoid locking.
- Please close down excel spreadsheet when not using • If you require assistance on the process outlined above, please contact Testing@mhhsprogramme.co.uk

For full guidance please click here

Data Prep

The Cohorts need to take the following approach to data prep for each test:

1. Initiating PP selects an MPAN with the correct characteristics. (If MPAN cannot be found with correct characteristics also complete step 5)

2. Initiating PP communicates to cohort that MPAN will be used in that specific test.

3. DS confirms that MPAN data loaded into system (if MTDs required also complete step 4).

4. MS sends MTD data to DS, SUP via D0268 or D0150, then go to step 6

5. Undertake business process to align the MPAN data characteristics to support test, this may require one of cohort PPs or LDSO to change MPAN data to required value (I.e. PP that masters data item requiring change. Business process execution will then align data across cohort PPs.

6. Start test

Initiating PP should invoke initial test step from step 2 onwards, for test case. This will enable any defects found in later steps to be recorded.

Data Security

All test data and evidence should follow data privacy guidelines. This includes obfuscation for the following items:

- **MPANs**
- **Customer Addresses (including street number, street name, and postcode)**
- **Meter IDs**
- **Meter Serial Numbers**

- Please note that during SIT Functional these items should not be shared across any communication channels such as email, Teams or SMS, ADO.

- MPANs should always be referred to by the MPAN reference id.

- These items can be shared over the programme SFTP to MHHS Programme participants.

- These items can be viewed by the Cohorts from the CSV file provided in the SFTP folders.

Note that during assurance review, if it's identified that an MPAN has not been redacted, the PP that has uploaded the information with the MPAN could be asked to:

1. **Download all test case evidence from the test run**
2. **Request ADO team to delete and reupload a new version of the TC**
3. **Then reupload all evidence into the new run and reinstate the run status**

Initial SIT Data Load for all PPs:

- We are requesting that when data is loaded into your SITF environment that you do not generate any outbound messages to the DIP.

Data Services Daily Processing:

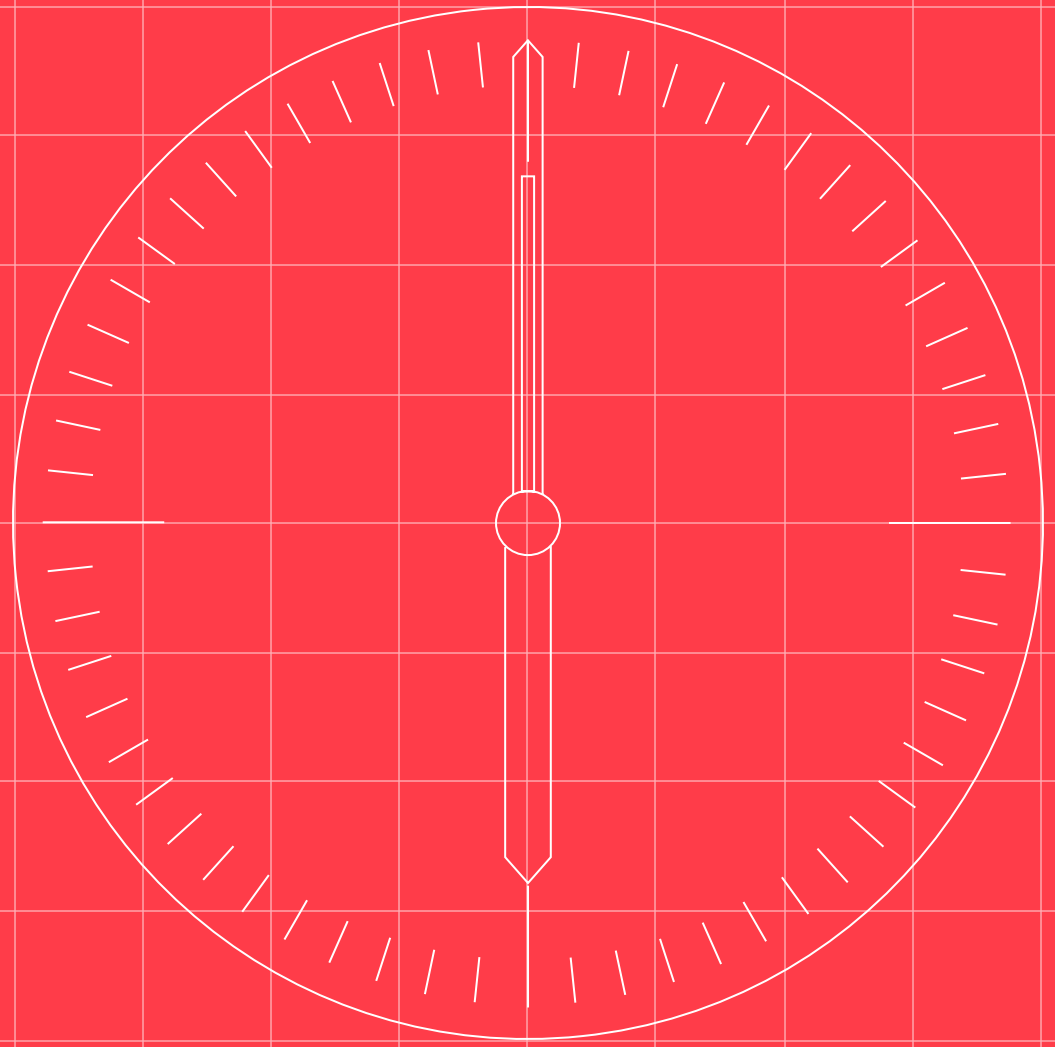
Problem Statement – Under normal BAU processing, Data Services will execute business processes for all appointed MPANs, which will automatically create outbound DIP messages. If a Data Service was to load all their appointed MPANs (circa. 1k) and operate the normal business process, then large volumes of messages will be generated across the DIP and received by other parties (e.g. MDS, Supplier etc).

To avoid this scenario two approaches can be employed to prevent the generation of messages:

1) Suppress message generation – either via a feature switch to prevent automated process running for MPANs or prevent message egress at MPAN level.
2) Load MPANs only when required for a specific test.

Approach to be agreed within each Cohort depending on DS use of “feature switch” or loading of MPAN prior to test, this will be confirmed in the Test Data Cohort meetings.

ADO Use Guidance



New for Cycle 3

Changes to Test Case Tags and Sub-Status Management in the Master ADO Project

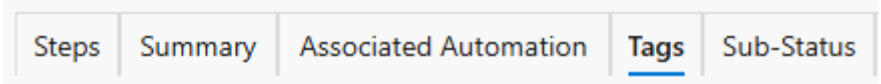
In Cycle 2 Cohorts had the ability within the 'Test Case Define' view to add **Tags** and set test case **Sub-Statuses** and provide an associated **Sub-Status Reason** (i.e. 'N/A', 'Blocked', 'Passed with Observations', 'Passed with Workaround').

In ADO each Test Case has a unique 'Test Case ID', and changes to that 'Test_Case_ID' record in the Define View are applied all instances of that 'Test Case ID' record in each Test Plan / Test Suite folder where it has been assigned.

In moving to the single ADO project, and to preserve tagging and sub-status setting functionality **at a Cohort level**, we have made some minor changes to way Cohort Participants will access these fields and functions.

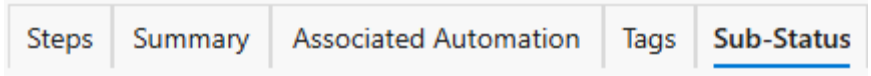
Summary of changes:

1. Each Cohort will now have a Cohort specific tag field that they can maintain within a **New Tags tab** in the Test Case Define View



2. Global Tagging will remain; however, this **will now only be used by the Programme** to mark tests with Tags that apply to all Cohorts e.g. where a Test is blocked by Central Party / Or Test Case defect

3. Participants will now see a **new tab** in the Test Case Define View called **'Sub-Status'** where if required they can set a sub-status specific to their Cohort's Execution of that case



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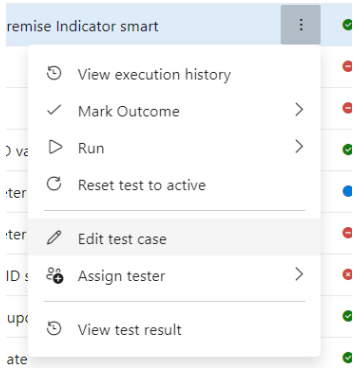
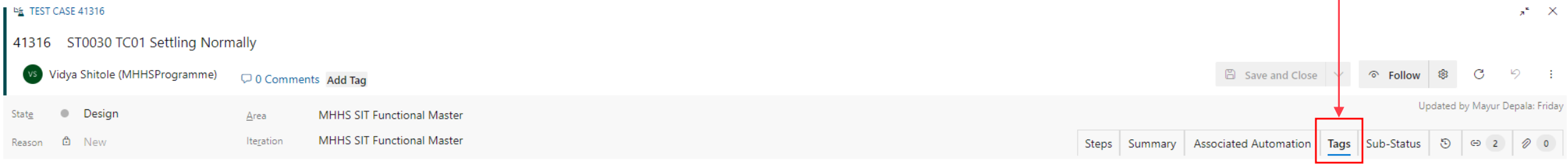
New ADO Use Guidance – Cohort Specific Tags

Adding a Cohort Specific Tag

After a test case name select the three dots ⋮ and select **Edit test case**



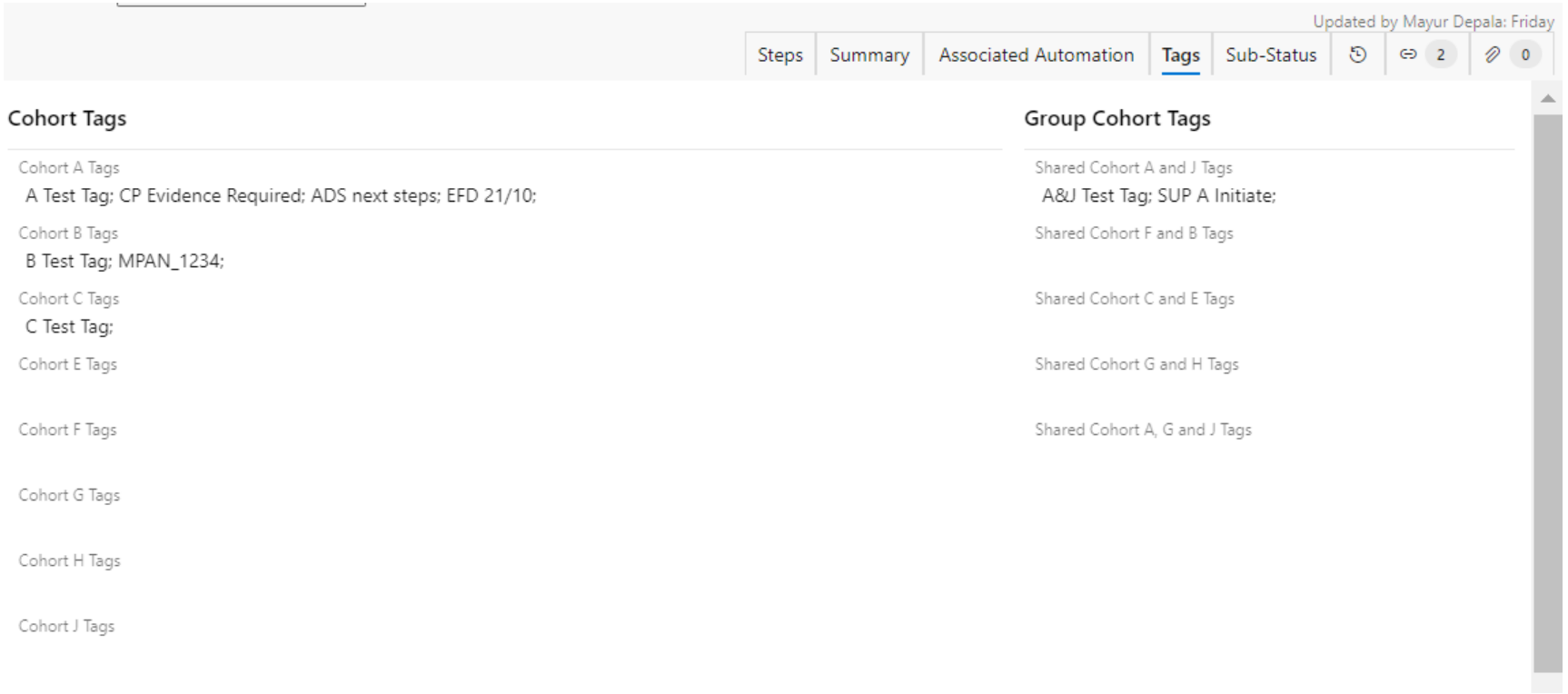
On navigation pane, select the tab labelled "**Tags**"



New ADO Use Guidance – Cohort Specific Tags

Adding a Cohort Specific Tag

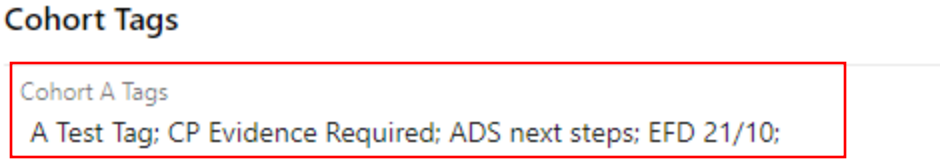
You will navigate to a new tab window which displays a **free text box** for each cohort and paired cohort to use for tagging
You can now enter or update tags for your specific cohort using the free text box. To remove a tag, simply select the text and delete.
You should separate each tag with a semicolon ";"
For example, a sequence of tags = *A Test Tag; CP Evidence Required; ADS next steps; EFD 21/10;*
NOTE – PPs should only update the free text box for their own cohorts



New ADO Use Guidance – Cohort Specific Tags

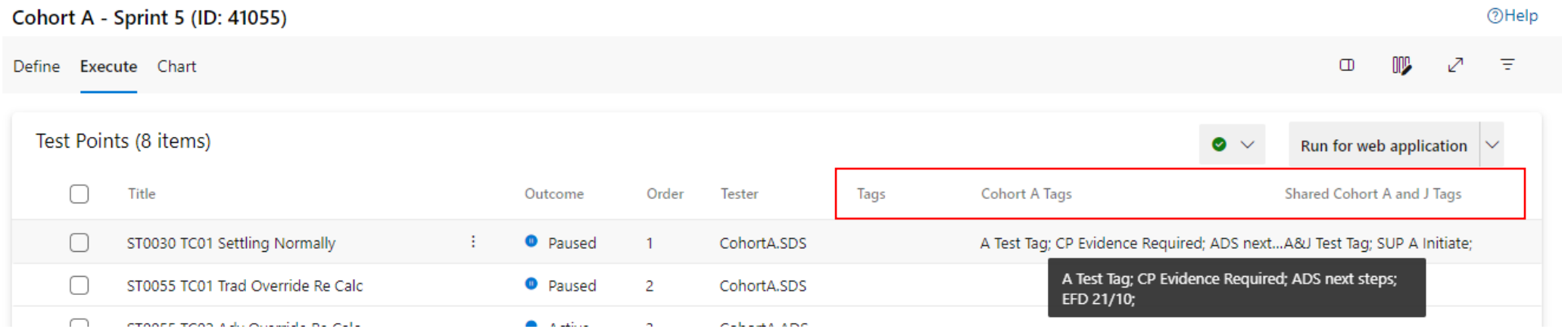
New for Cycle 3

Type in or remove your tags



Click Save and Close

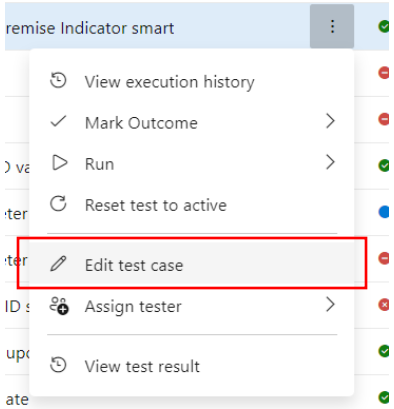
You see your new tag against the test case, you can hover over a column to see full details



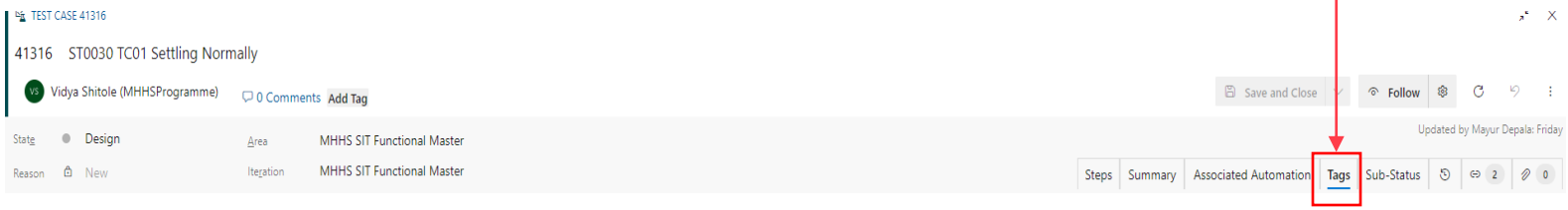
New ADO Use Guidance - Cohort Specific Tags

Removing a Tag

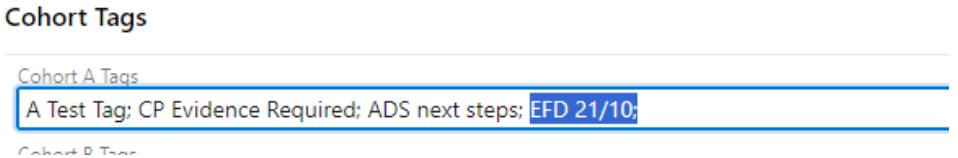
After a test case name select the three dots ⋮ and select **Edit test case**



Navigate to the **Tags** Tab



Delete the text you no longer wish to display in the respective Tags column

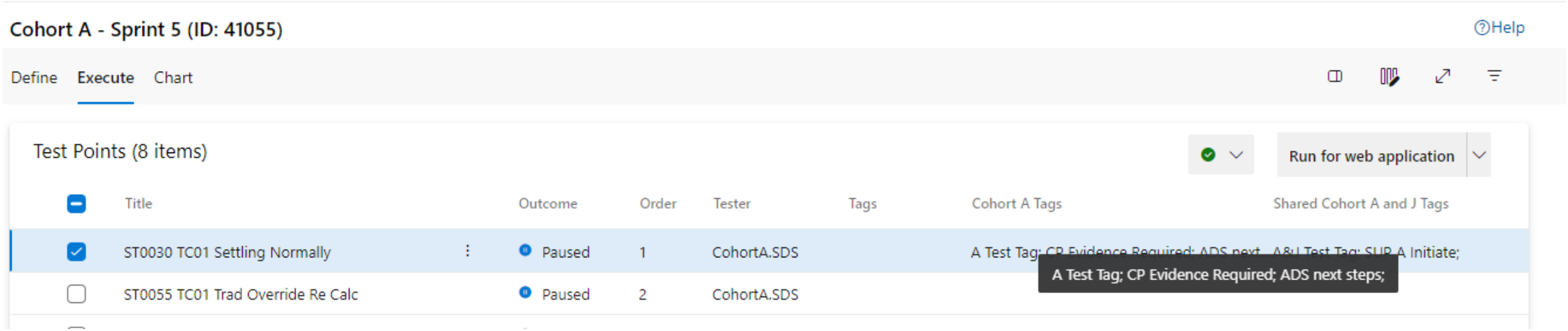


Click **Save and Close**

New ADO Use Guidance - Cohort Specific Tags

New for Cycle 3

The test case tag is removed.



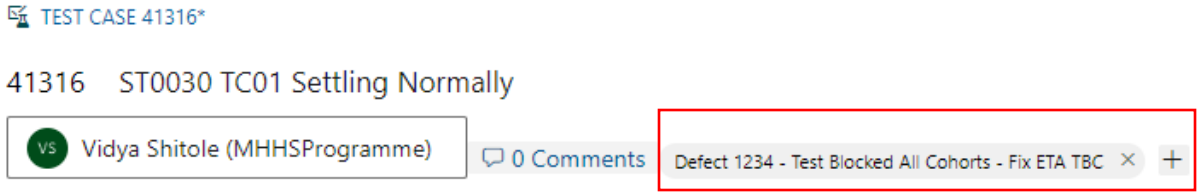
New ADO Use Guidance – Programme Wide Tags

New for Cycle 3

The Global tags feature will still be present as it was in Cycle 2, however this is **to be used and controlled by the programme SI team**.

This tag field will now be used **to communicate programme wide blocking issues or communications on specific test cases by the programme**.

An example of how these tags might be used is below:



In execute view

Note 1 - These tags will be visible on every instance of the test case that has been propagated to the cohort sprint folders, enabling all cohorts to be aware of defects or guidance on test cases. PPs are not to use this tagging feature going forwards.

Note 2 – the programme is implementing a solution that will transfer all pre-existing Global and Cohort Specific Tags when new Test Case versions are made available

ADO Use Guidance - Cohort Specific Tags

Tag Use Cases

Tags may be used by a Cohort to indicate the status of a test, associated defects and parent defects, priority, next actions, current progress, passed status in other cohorts.

Example tags are:

Tag	Description
#1 Priority;	Indicating Priority in Cohort
Paused 23/05;	When it was last actioned and set to a paused status
12345;	Defect associated with the test case
[56789];	Parent defect associated with the test case
12345 [56789];	Defect and Parent defect associated with the test case
23456 Test Case Query;	Defect associated also showing it is a test case defect
Test Data Query;	Question over the data to be used within the test case
Needs Restart;	Test case must be restarted
Parent Defect Retest Passed;	Parent defect resolved and passed retest, so retest required
Ready for Retest;	Defect resolved and test case may be retested
Ready for Test;	After unblocking a test case that has not been previously started
Passed in B;	Indicating a successful run of this test in another Cohort
47 of 48;	Adding test case step progress counter as test case nears completion
Needs De-energisation;	Showing action required before test case can be started
Test Case Updated;	After a Test Case has been updated following a Test Case release
SSD dd/mm;	Indicating the SSD on a COS test case
SMSI=B SMSO=E;	On Joint Cohort tests indicated who is the Incoming and Outgoing Cohort

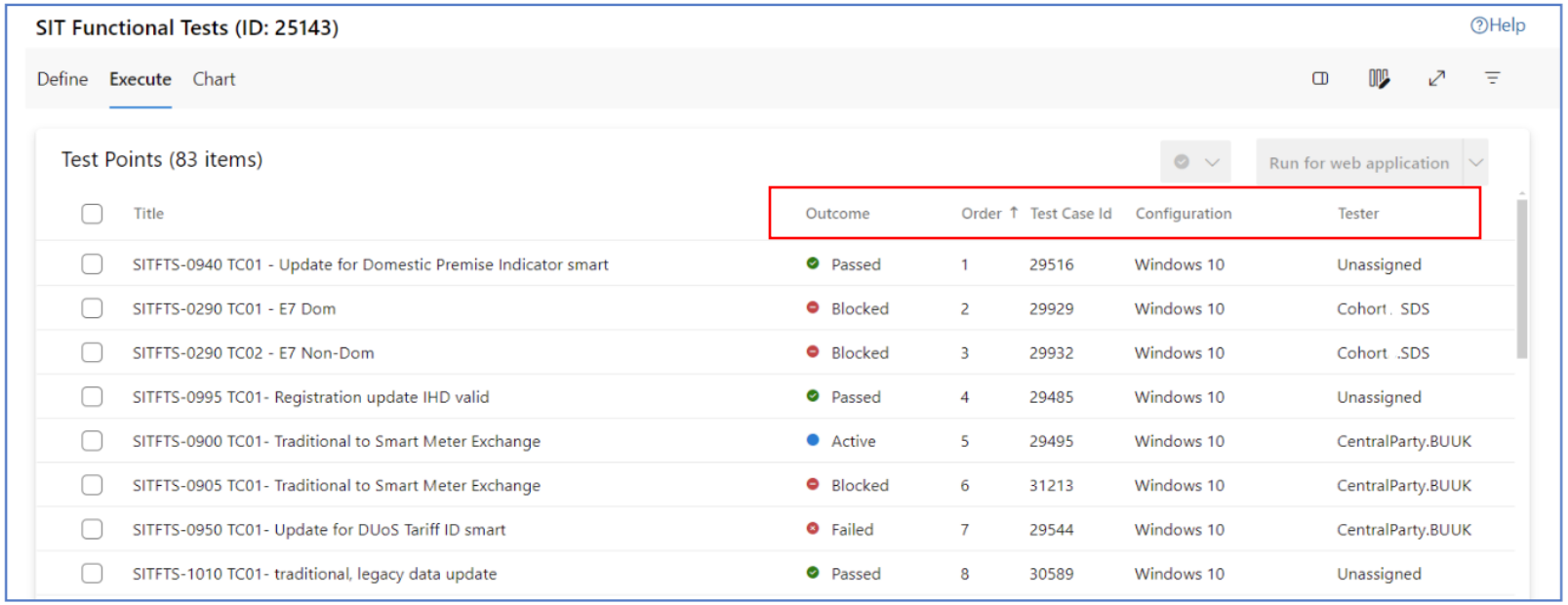
ADO Use Guidance – Adding Cohort Specific Tags Columns

ADO - Enhancing the Execute View and using Tags

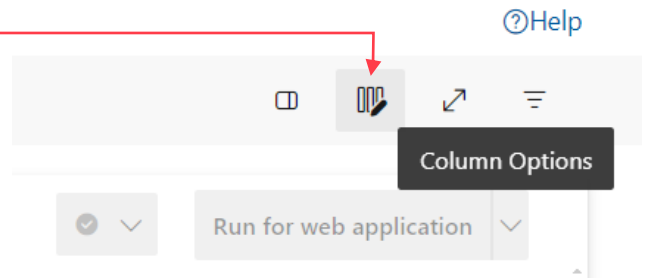
ADO has the facility to add extra data columns to the Execute view that are useful to enable a richer view of the status of a test case. The instructions below are intended to show how to add the columns so all Participants can have a consistent view in ADO.

Adding ADO Execute View Cohort Specific Tags Column

This is the initial ADO Execute page layout



In the top right click the **Column Options**

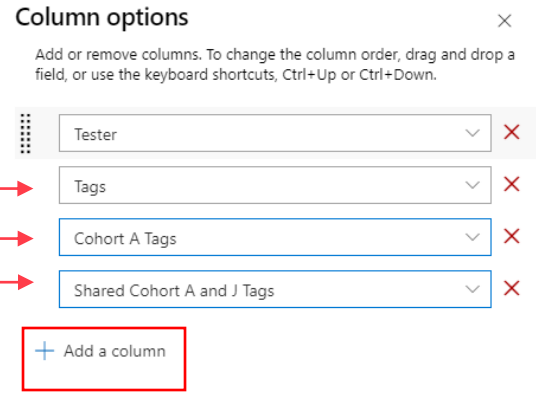


New ADO Use Guidance - Adding Cohort Specific Tags Columns

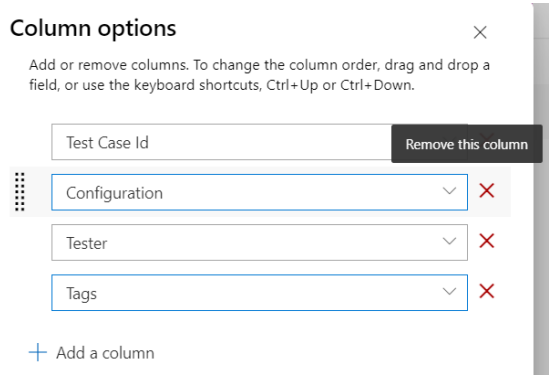
Updated for Cycle 3

Click **Add a column** and from the drop down in the last box select options based on your cohorts

1. **Tags**
2. **Cohort X Tags**
3. **Shared cohort X and X Tags**



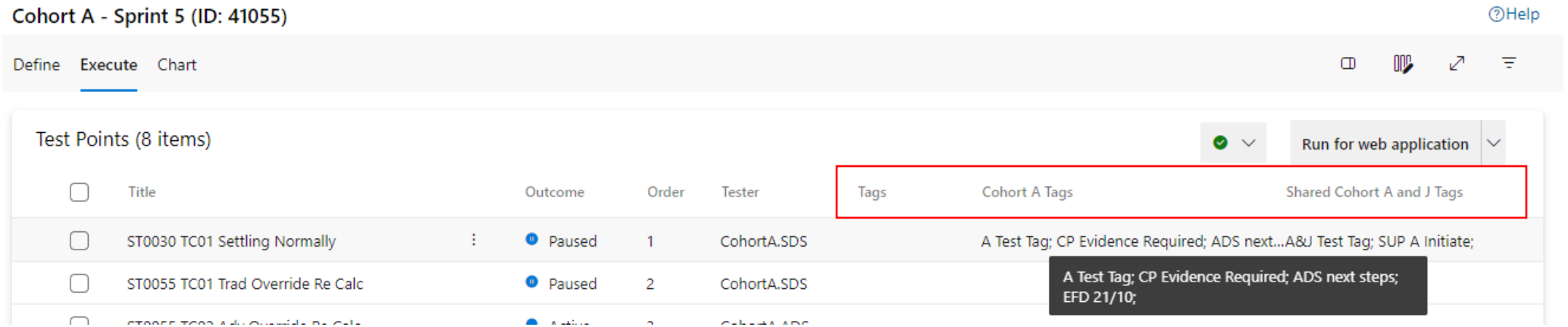
Optionally, you may click the **X** after the Configuration column box as it is not needed and improves readability of tags



New ADO Use Guidance - Adding Cohort Specific Tags Columns

Click **OK**

This is your new view showing the **Tags** field and any associated Tags already entered



New for Cycle 3

If required a Cohort can set an appropriate a Test Case **Sub-Status** associated with their Cohorts' Test Case Execution.

Sub-status	Circumstances this sub-status might be used
Blocked	Cohort or PP can't run the test due to a Central or Internal Cohort Defect or Issue
N/A	The Test Case can't be run due to a Cohort specific reason or constraint, and as consequence it has been agreed with the Programme that this TC is no longer applicable to complete for the Cohort
Passed with Workaround	The test has been completed, but a workaround was employed that was agreed with the programme could be used to complete the test
Passed with Observations	The Test Case execution was completed but there was a deviation from the Test Case steps, or expected results, which has been agreed as acceptable by the Programme, e.g. there was a minor test case defect which is acknowledged, but did not invalidate the objective of the test

These sub-statuses are used in MHHS SIT testing to create an audit record of the above circumstances during and after testing.

In the Master ADO project, Cohort participants will still be able to continue to use a sub-status, but how they are accessed and maintained will be under a new tab called 'Sub-Status' in the Test Case Define view, this will enable each Cohort or Paired Cohort to manage them independently of other Cohorts.

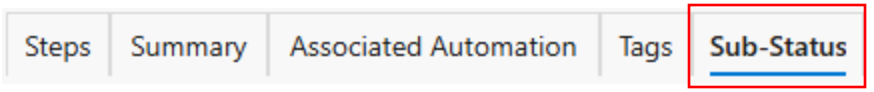
New ADO Use Guidance – Cohort Sub Statuses

New for Cycle 3

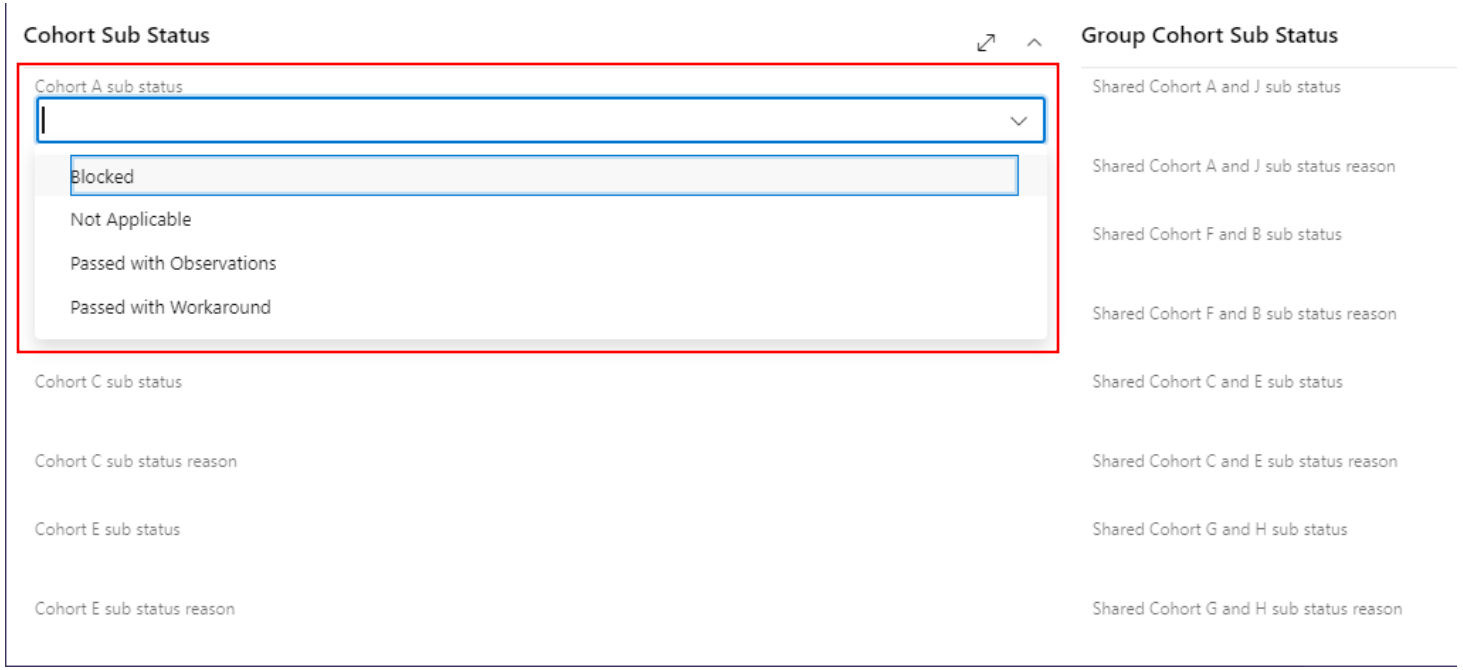
Participants will now see a **new tab** in the Test Case Define View called **'Sub-Status'** where if required they can set a sub-status specific to their Cohort's Execution of that case

To use these fields:

Open the define view and select the sub status tab



You will then be able to see a drop-down box and a free text field for each cohort and shared cohort with reasons for Blocked, Not Applicable, Passed with Observations and Passed with Workaround



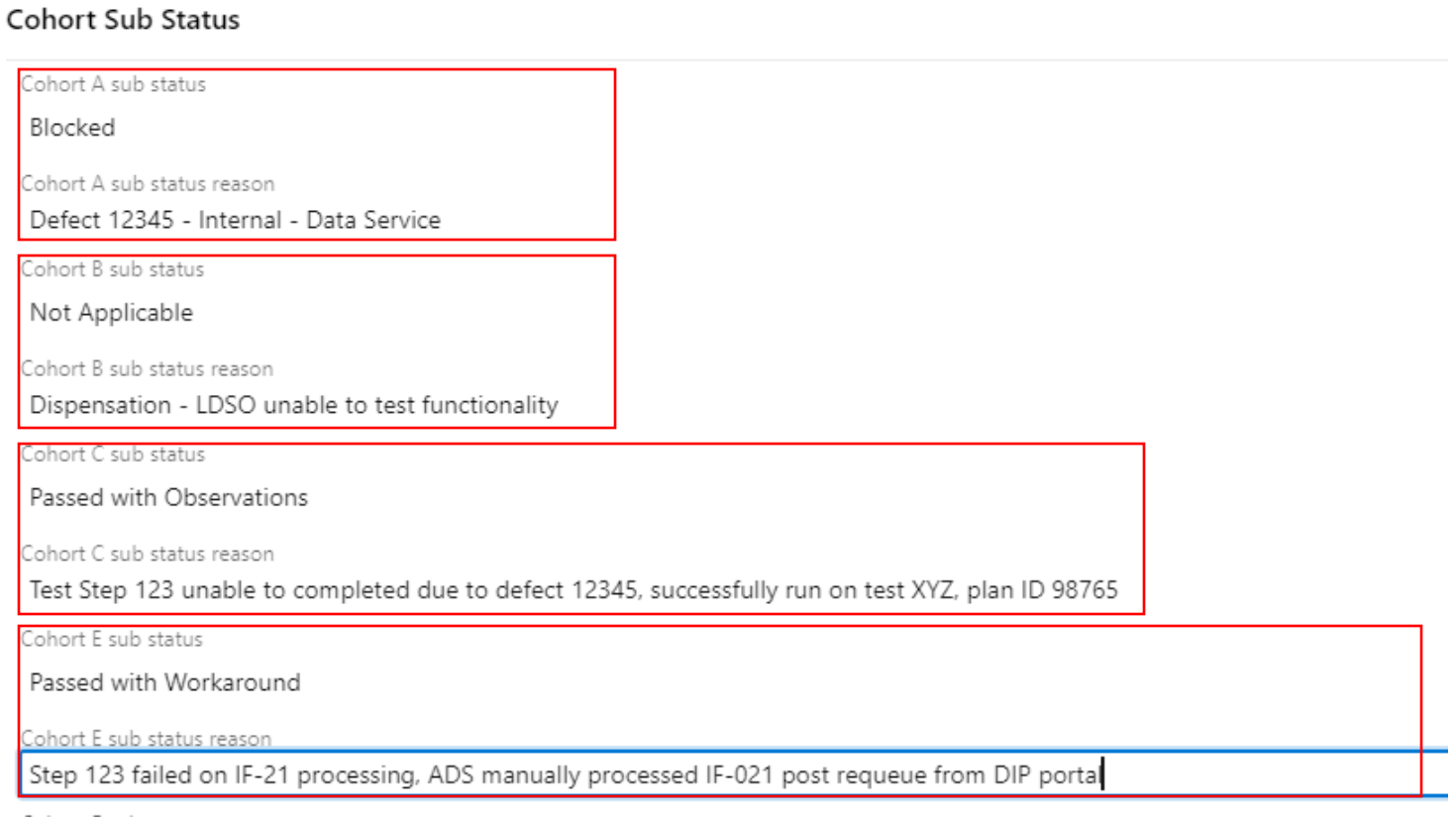
New ADO Use Guidance – Cohort Sub Statuses

New for Cycle 3

When setting a sub-status applicable to your test case, a mandatory associated sub-status reason will also need to be added

These fields can be used by multiple cohorts, **Please only update the fields respective to your main or shared cohort.**

Example statuses and reasons:



New for Cycle 3

To summarise the Cycle 3 changes & benefits:

1. Cohort level Test Case Tags and Sub-Status Maintenance features remain in the Master ADO Project (now residing in separate tabs on the Define view)
2. Global Tags are now able to be maintained at Test Case ID level by the programme enabling greater visibility of Cohort-wide blockers
3. Global and Cohort Tags will be automatically transferred when new versions of a Test Case are made available

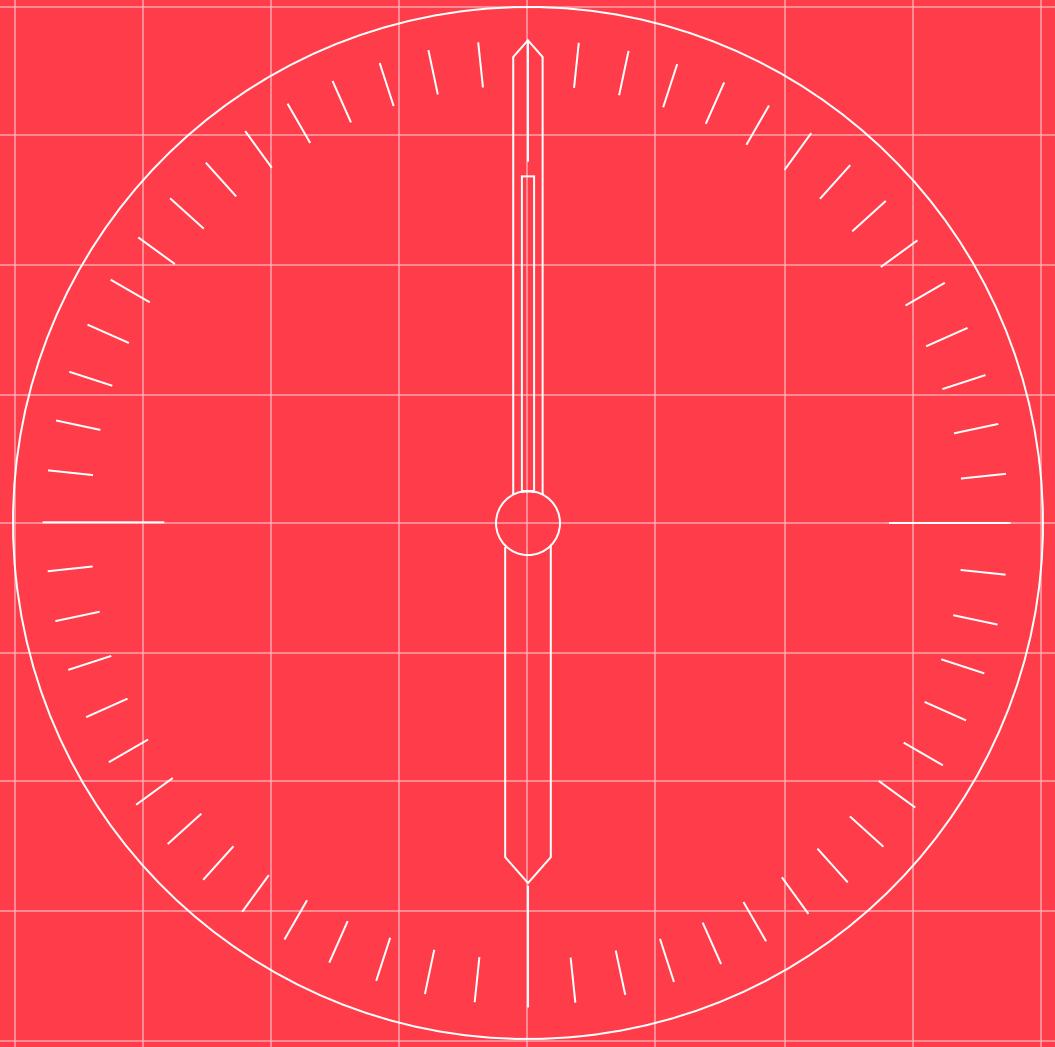
Ensuring Test Case Define View edit safeguards:

Given that changes made in the Test Case Define view will be applied to all instances of that 'Test Case ID' in all Test Plan / Suite locations, the programme will be implementing mitigations for the risk that users could inadvertently edit attributes specific to other Cohorts:

- Permissions to edit Tags and Sub-Statuses in the Define view will be granted to one nominated responsible user from each SIT PP organisation per Cohort (Coordinators will confirm the nominated users bilaterally with each Cohort PP member)
- The programme is implementing an alert system to mitigate and resolve unintended edits by users
- Edit permissions can be rapidly granted to delegate users in event of sickness or leave

Note - this policy & risk will remain under review and the edit permissions user group broadened if deemed sufficiently secure

Teams Channel Use Guidance



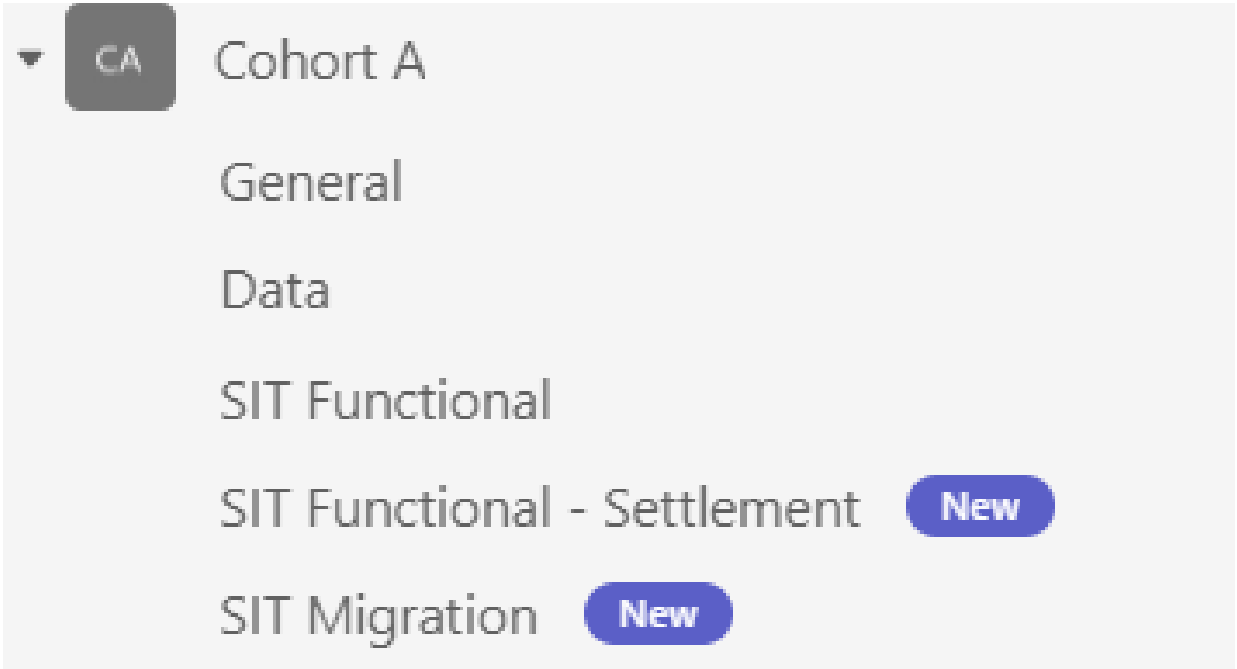
Teams Channels

MS Teams channels have been created for each individual cohort to enable discussion for each test stream as per the screenshot.

1. **General** – existing channel, to discuss outages, releases and non-test case related items
2. **Data** – Channel to be used for data prep/data issues
3. **SIT Functional**
4. **SIT Functional – Settlement**
5. **SIT Migration**

Participants requested to use the respective Teams channel for the items under discussion.

Note – Settlement and Migration is not in scope for paired cohorts so channels will not be present. Paired cohorts have the previous structure.



Teams Channels Created for each Cohort

Approach to Test Case Execution kick off and the aligned evidence upload ordering

The following test approach is designed to foster collaboration and efficiency in our testing processes. By promoting clear communication and proactive planning, we aim to streamline test execution and ensure all prerequisites are met before execution begins. It underscores the importance of teamwork, clarity during execution and evidence upload, and effective coordination for robust quality assurance.

Process Steps

Step No.	Step	SI Team / PP Owner
1	Clearly define prerequisites for a test case (s) by posting a thread on Teams channel and allow starting further down if prerequisites are already completed.	**Participants**
2	Clarify roles within test cases and tag them on Teams channel involving multiple organizations through cohort communications especially for joint Cohort tests	**Participants**
3	Encourage participants to tag multiple parties on Teams channel for verifying the step and attaching evidence which involves receiving a particular PUB message – this will speed up execution e.g. DIP sends PUB-036 to SUP,MSS,SDS,LDSO,EES,MDS – So in this case, evidences can be attached by multiple parties at the same time while the test case is in a Paused state	**SITF Coordinators / Participants**
4	Encourage participants to attach evidences for future test steps wherever relevant e.g. Step -12 DIP sends PUB-034 to REGS and then Step 15 - REGS sends PUB-035 to DIP – so in this case, evidences can be attached on multiple test steps by participants and the same can be communicated on the Teams channel	**Participants**
5	For Joint Cohort tests, it is recommended that for a particular test case (s), SUP role starts a new thread on Teams channel and indicates/tags the incoming/outgoing SMSI.SMSO.SDSI,SDSO,ADSI,ADSO roles for their respective test step (s)	**Participants**
6	In the event of a test case being restarted, participants and the initiating role should start a new Teams channel thread for the rerun, using lable to indicate RERUN 1, RERUN 2 etc. This enables all PPs to track the MPAN used for the rerun as well as a new fresh thread for the test run to avoid confusion and miscommunication	**Participants**

Teams Channel Guidance (1 of 2)

- Each cohort has a private Teams channel to allow for test progress communication and co-ordination
- This can be done by starting clicking "**Start a post**" in the private cohort Teams channel
- Once a post has been started the template below should be used as a basis for your initial post.

SITFTS-0999 TC09- Example Test (ADO Test Case Name)

MPAN: SOUT_12345678 (always the MPAN Reference and never the real or manufactured MPAN)

Outgoing: SUP B (the outgoing / losing Cohort role if applicable)
Incoming: SUP E (the incoming / gaining Cohort role if applicable)
SSD: Wed 05-Jun-2024 (if applicable)
Test Steps: 42

Can all participants confirm they have reviewed the test case and pre-requisites. Once confirmed this test will be ready for all the following participants to begin execution and add evidence (comment from the initial poster if required)

Role	Contact 1	Contact 2
SUP B	SUP Name 1	SUP Name 2
SDS B	SDS Name 1	SDS Name 2
MSA B	MSA Name 1	MSA Name 2
MSS B	MSS Name 1	MSS Name 2
ADS B	ADS Name 1	ADS Name 2

continues...

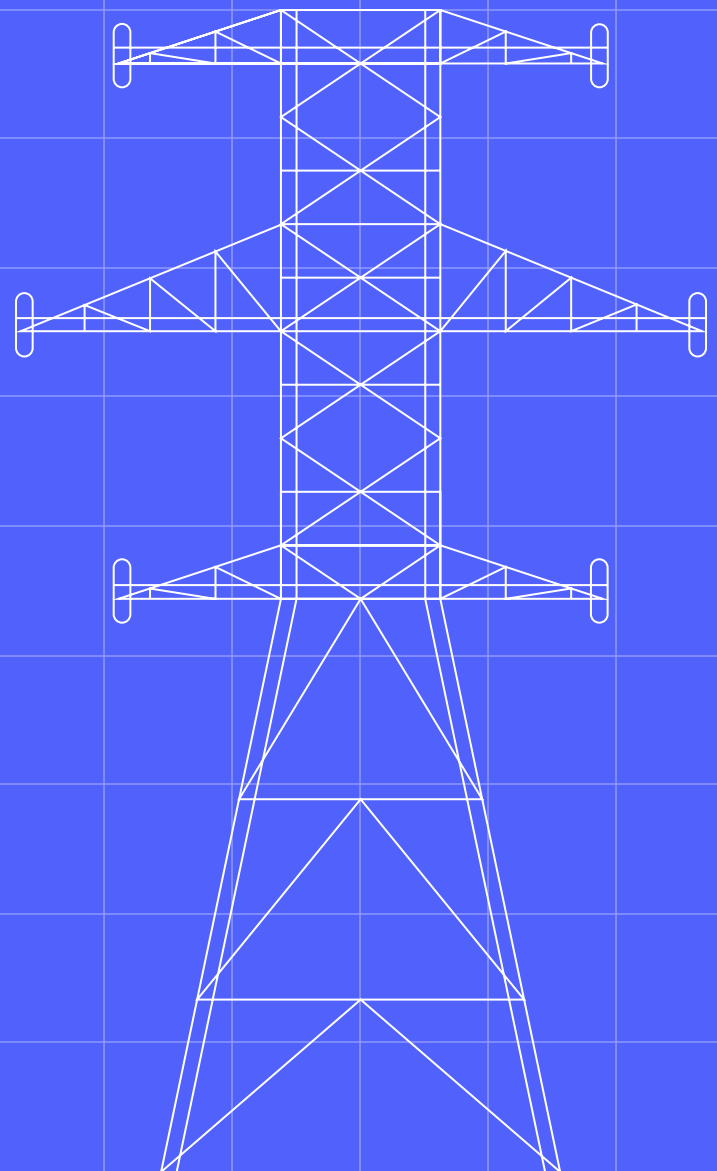
Teams Channel Guidance (2 of 2)

...initial post continued.

Role	Contact 1	Contact 2
SUP E	SUP Name 1	SUP Name 2
SDS E	SDS Name 1	SDS Name 2
MSA E	MSA Name 1	MSA Name 2
MSS E	MSS Name 1	MSS Name 2
ADS E	ADS Name 1	ADS Name 2

Central Party	Contact 1	Contact 2	Contact 3
BUUK (LDSO if ETCL MPAN)	Stuart Riding	Scott Mordecai	
BUUK (UMSO if ETCL MPAN)	Hasamul Hoque	Aaron Edwards	
BUUK Escalation and Gatekeeper issues	Stacey Buck	Hazel Cotman	Chris Sanders
DCC (CSS)	Abdul Muthalif	Darren Gerrard (escalation)	Vijay Srivatsan
DCC	VenuGopal Boya		
RECCo (EES)	Holly Byrne	Ryan Middlemas (C&C Group)	Chris Lenihan
SSEN (LDSO if SOUT MPAN)	Anisha Srinivasa (SSEN)	Nathan Johnson (SSE)	Lavanya Bhadraiah (SSE)
Helix (MDS / LSS)	Manjunatha Muniyappa (CGI)	Nitish Sharath (CGI)	Mohit Kumar (CGI)
StClements (REGS) Functional	Surinder Kaur	Cohorts A, B, C, E, A&C, B&E, C&E	
StClements (REGS) Functional	Gurdip Sehejpal	Cohorts F, G, H, J, A&J, B&F, F&J, G&H, A/G/J&UMSDS	
StClements (REGS) Migration	Rajesh Degala	Cohorts A, B, C and E	
StClements (REGS) Migration	Steven Parker	Cohorts F, G, H and J	
StClements (REGS) Functional Escalation	Louise Mills	Ian Aitken	
StClements (REGS) Migration Escalation	Simon Hinks		
StClements (REGS) Backup Contact	Anna Davis		

Interacting with Central Systems & Services



MHHS PROGRAMME

Industry led, Elexon facilitated

Back to Contents

DIP Backoff & Retry

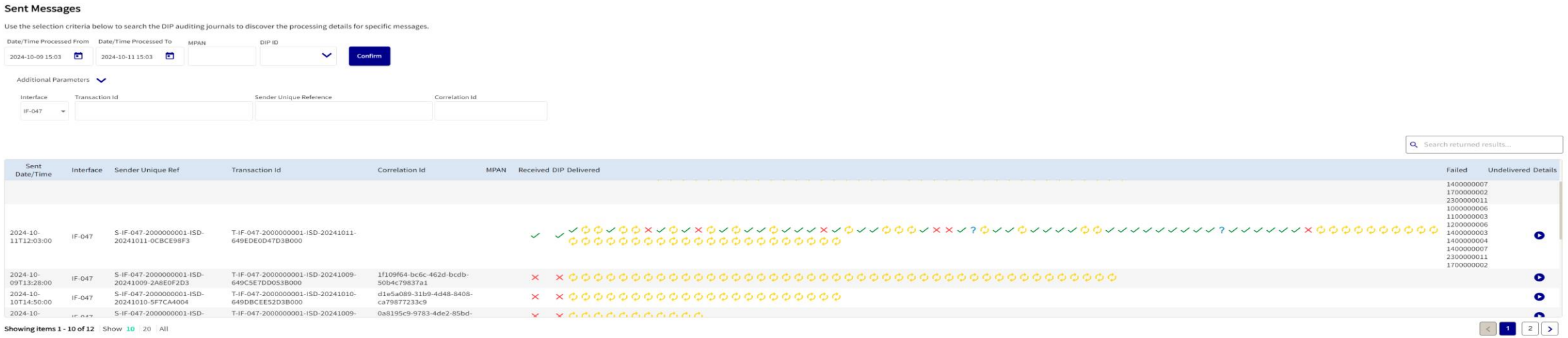
As part of the latest updates from the DIP service provider 'Backoff and Retry' functionality has been implemented, its purpose is to ensure mitigate service interruption as a consequence of the receiving participant systems being temporarily unavailable, e.g. a network interruption causing an HTTP500 error.

In the event of the DIP failing to establish a connection with the participant system it will cycle through an exponential wait period retrying the connection after 1 minute, 30 minutes, 1 hour, 6 hours, 24 hours and 48 hours before reporting that the message could not be successfully sent.

The status of individual messages can be monitored using the message tracker on the DIP portal. A message in 'retry' being shown as a yellow recycle symbol

The screenshot below shows the status of an IF-047 either successfully sent, failed or in retry.

Participants are encouraged to use the message tracking tool to determine whether a missing message is in the backoff and retry cycle before logging a defect.



DIP Message Replay Functionality via Portal - Overview

1. The Programme would like to advise Participants that within DIP an option to replay Messages is now available via the DIP portal.
2. The message receiving party can use the replay functionality.
3. This feature is provided to assist Participants to receive messages by replaying if for some reason the message was lost due to system failure (alongside several other scenarios). The replay functionality will enable participants to retrieve messages from DIP archive.
4. Current limitation in the SIT environment is only messages sent within 10 calendar days before current date can be resent/replayed.
5. All Participants with Log-In accounts to the DIP have access to this new feature.
    - Where additional accounts are required then these can be set up by each Participants admin user.

- *Caution - Participants should note that this new **DIP Message Replay feature** is a test version that is still undergoing testing activity in preparation for full use in production. This feature has been made available to Participants to use as part of the SIT Functional test phase in order to help identify any issues by testing its usability against the messages replayed as part of this testing phase. This will enable any required refinement of the UI design in light of any observations noted during testing.*
    - *If Participants identify any observations or defects with this new feature during testing then these should be logged as defects, using the standard process.*

DIP Message Replay Functionality via Portal - Policy when using this feature

1. If a test Participant wants to use this feature in SIT testing, we ask that you first discuss this with your Cohort Coordinator to confirm it is appropriate to use it (please note this will need to be a swift action to avoid the 10-calendar day period timing out).

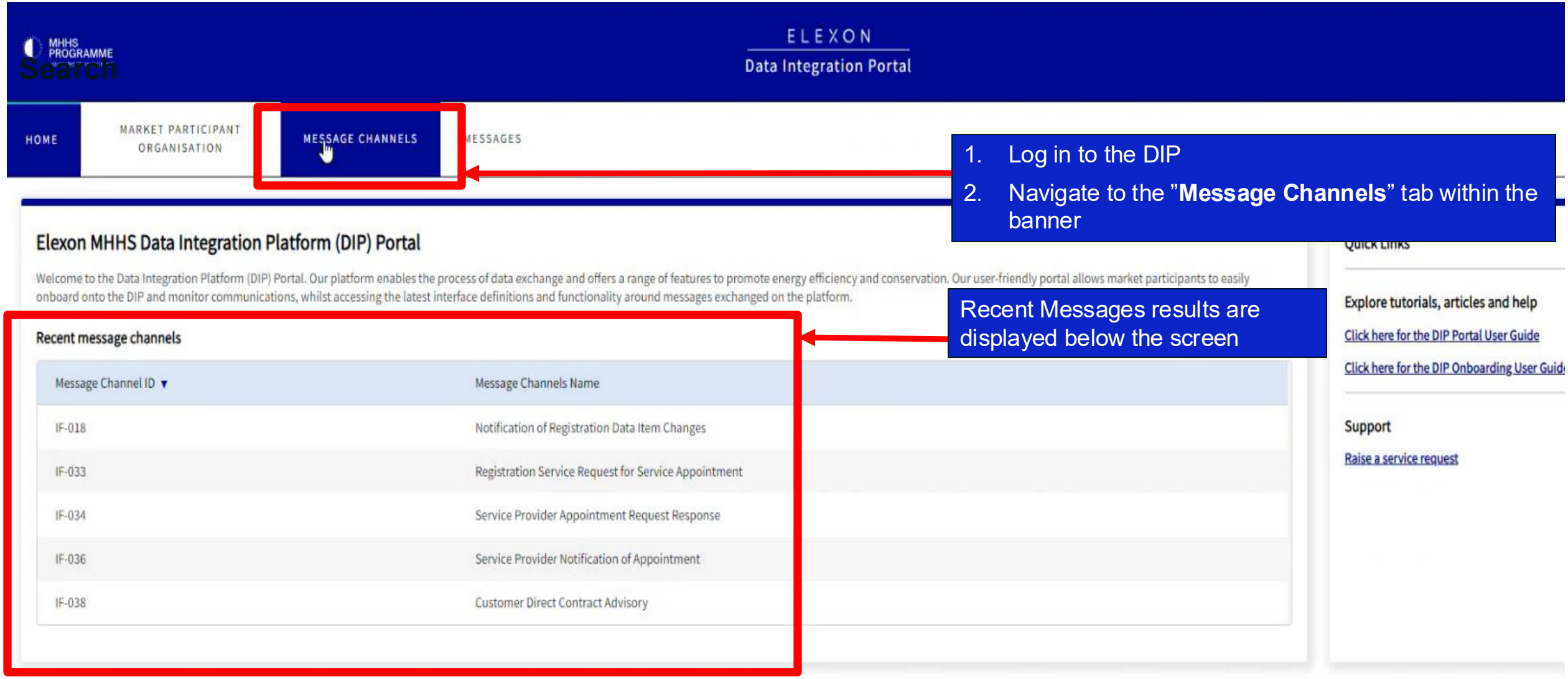
2. If / when your coordinator has confirmed it is valid to use this feature to progress and complete your test, then please follow the instructions in slides 4 – 10 in this pack

3. **Audit Trail:**

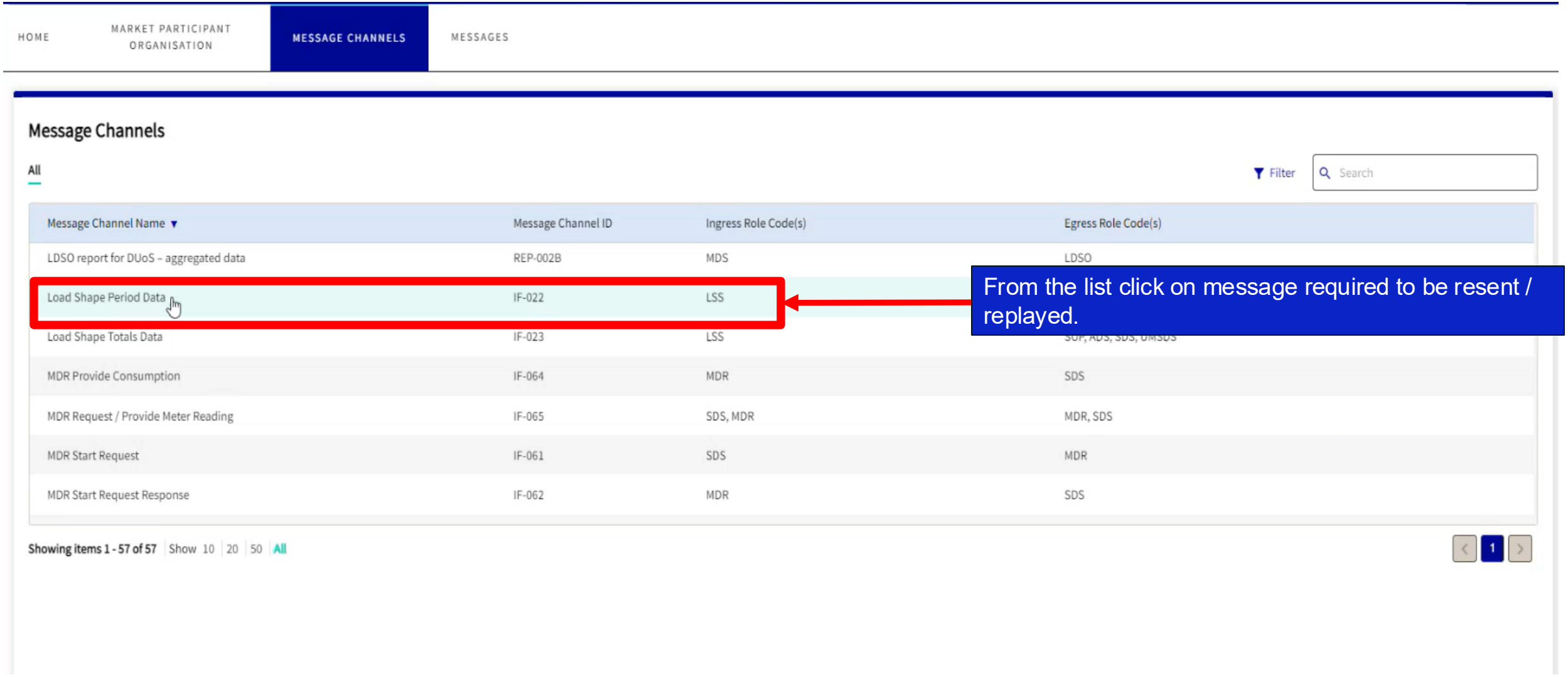
   - If this feature has been used and the test has then been completed successfully i.e. Passed, we require that the test is set with the sub-status of 'Passed with Workaround' – see instructions in slide 11

   - When using this sub-status, you will need to complete a mandatory reason field in which you must provide details of the circumstances which led to you using this feature to conclude your test, also referencing any related defect if a defect was involved. (**Important:** please insert 'DIP Replay Invoked…' within the reason text)

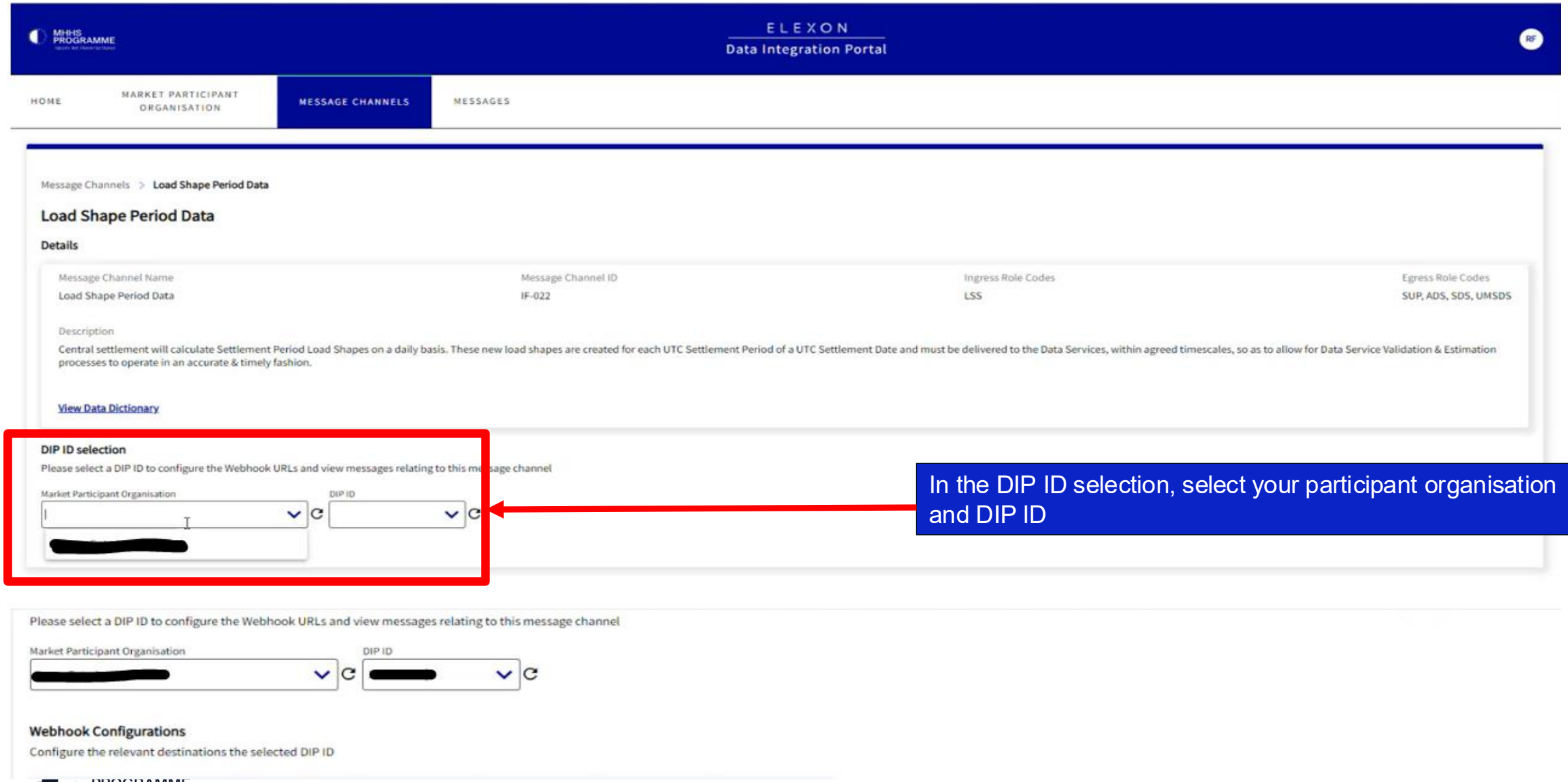
DIP Message Replay Functionality via Portal - Using the DIP Message Replay Functionality



DIP Message Replay Functionality via Portal - Using the DIP Message Replay Functionality

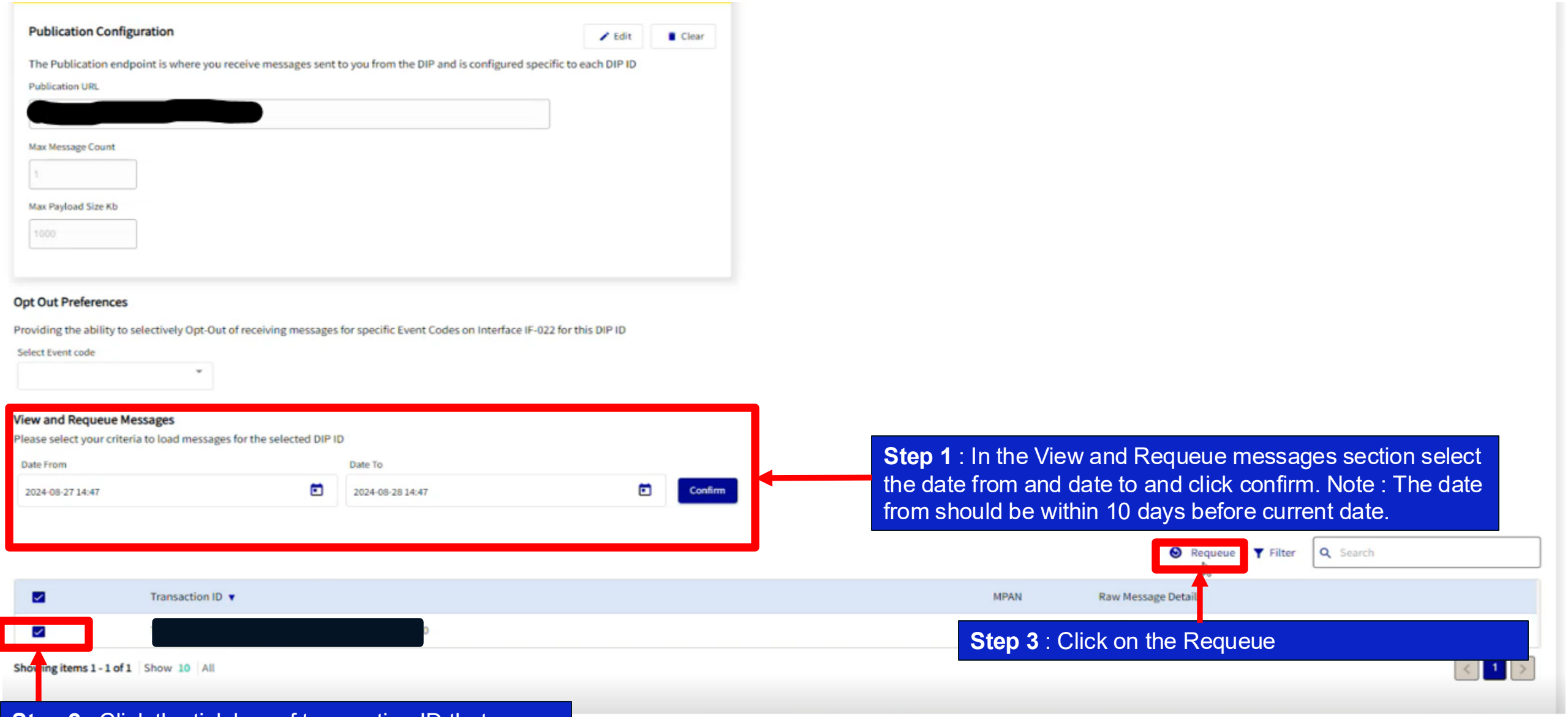


DIP Message Replay Functionality via Portal - Using the DIP Message Replay Functionality



In the DIP ID selection, select your participant organisation and DIP ID

DIP Message Replay Functionality via Portal - Using the DIP Message Replay Functionality

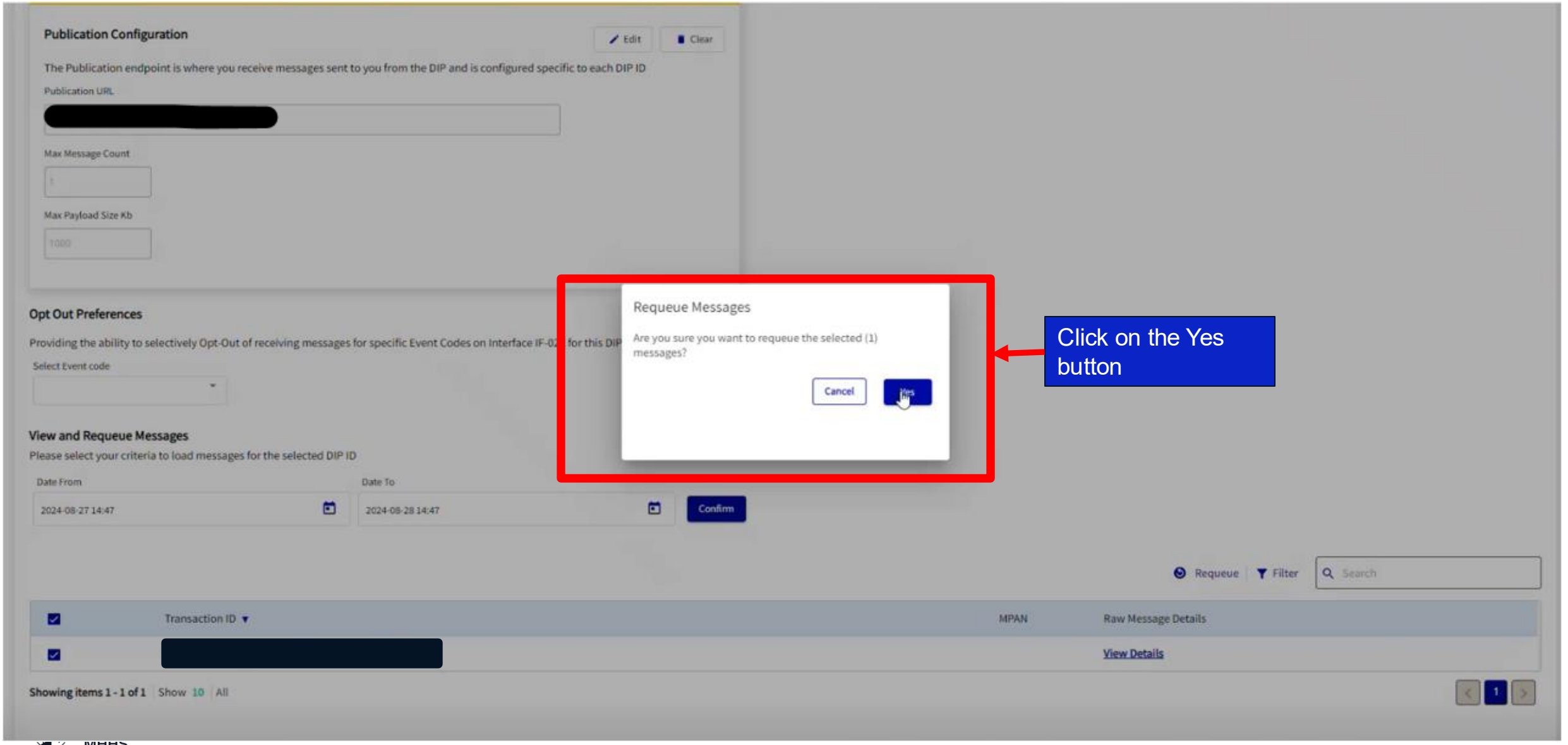


Step 1 : In the View and Requeue messages section select the date from and date to and click confirm. Note : The date from should be within 10 days before current date.

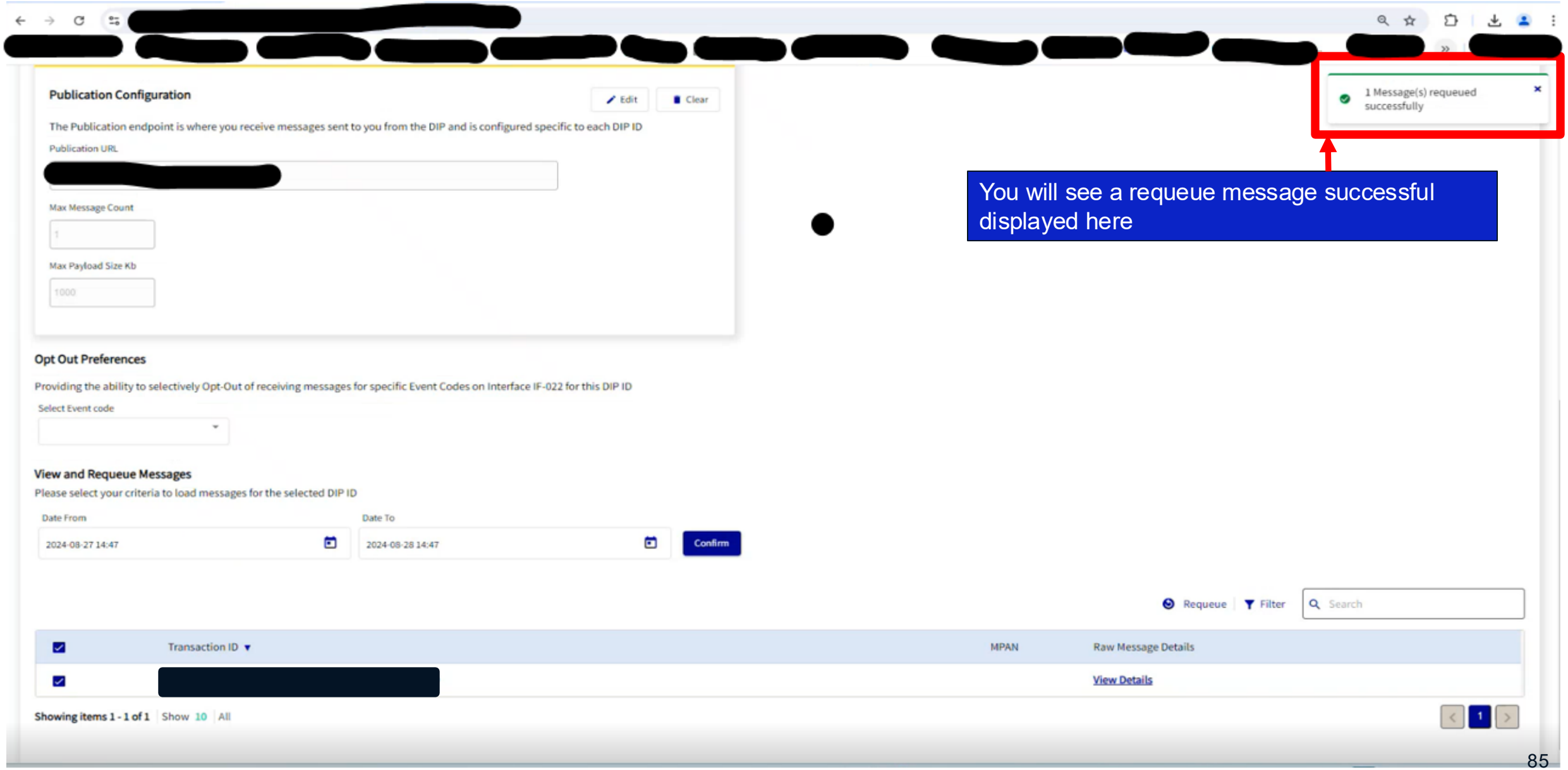
Step 2 : Click the tick box of transaction ID that requires to be replayed.

Step 3 : Click on the Requeue

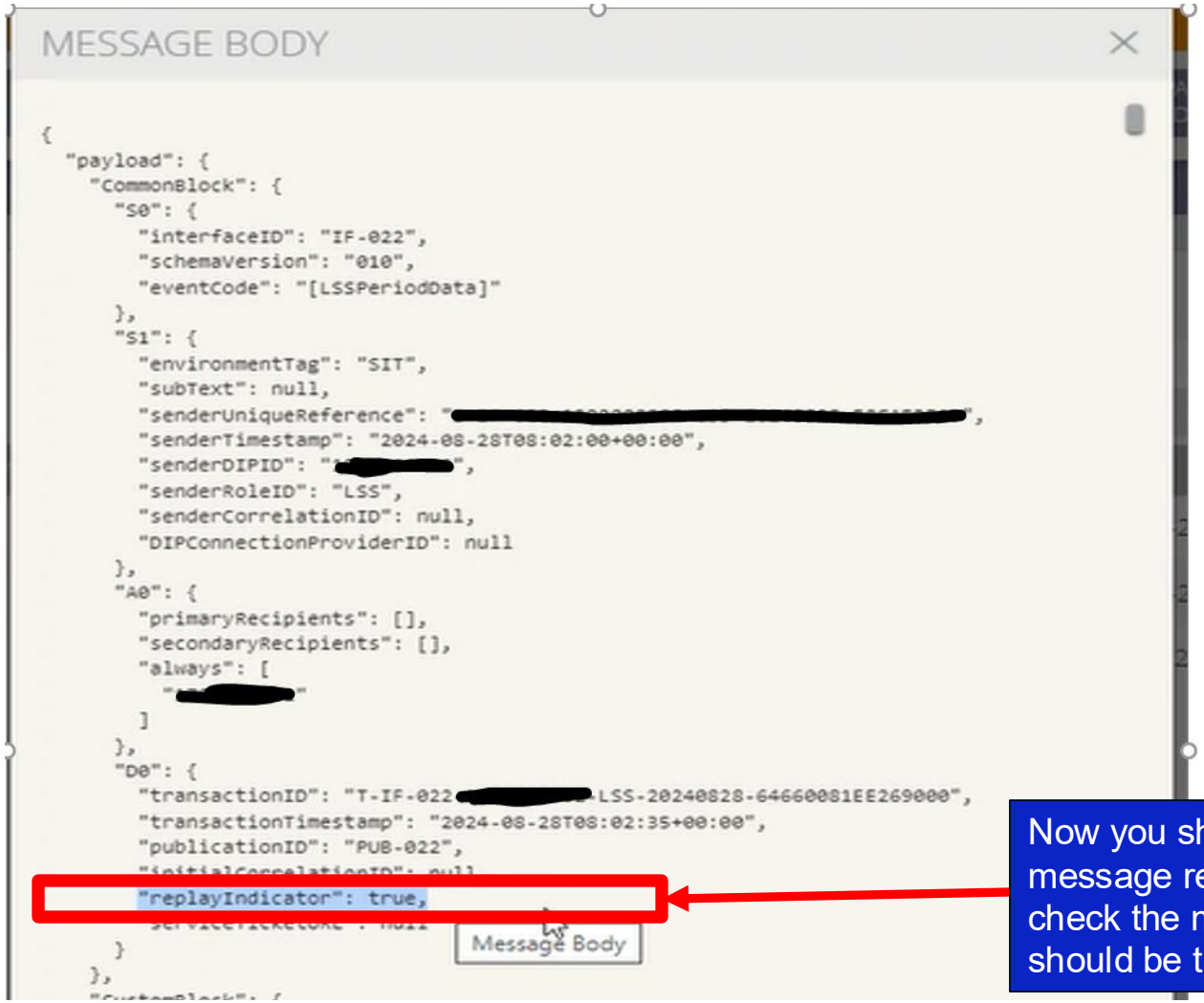
DIP Message Replay Functionality via Portal - Using the DIP Message Replay Functionality



DIP Message Replay Functionality via Portal - Using the DIP Message Replay Functionality



DIP Message Replay Functionality via Portal - Using the DIP Message Replay Functionality



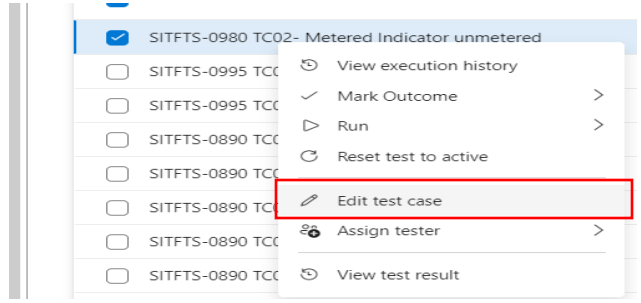
Now you should have received the new message replayed . Note : When you check the message the replay indicator should be true.

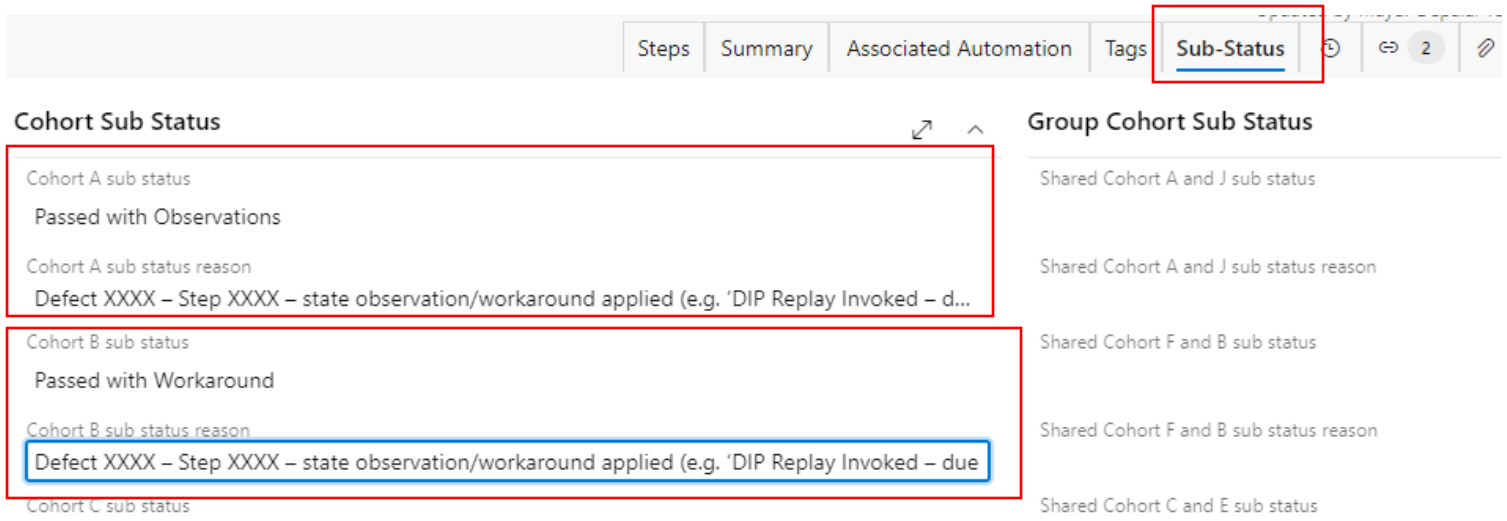
ADO Use Guidance – Passed with Observations or Workaround

In the event of a test case defect that is deemed 'non-material', and workaround guidance has been issued to participants, and the PP then goes on to conclude that test with a 'Pass', we ask that PPs set the test to the *'Passed with Observations'* sub status noting the test case defect that was encountered in the mandatory reason field that is required when this sub-status is selected.

To add a sub-status of '*Passed with Observation*', the PP must:

1. Open the define view of the test case by right clicking the test case and selecting "Edit test case"
2. Within the define view you will be able to navigate to the sub-status tab
3. Within this tab you can enter your cohorts workaround/observation reason from the drop down and enter the reason into the free text box
4. The reason must include "Defect XXXX – Step XXXX – state observation/workaround applied (e.g. 'DIP Replay Invoked – due to x reason…')"





Scheduled Daily Event Times

- In the real-world CSS and Registration Service events will occur daily at 1700 hrs (CSS) and 1800-2000 hrs (MPRS)
- The testing day for SITF will be 0900 hrs to 1700 hrs.
- The proposed approach to support testing is to request that CSS and MPRS are configured to run their gate closure events at 1500 hrs (CSS) and 1530 hrs (MPRS).
- This will allow testing parties to observe these events within working hours, supporting triage / test completion.
- In terms of choreography the following considerations should be made:
- CSS messages will be generated at 1500 hrs, which will change the status of Switches to “Secured Active”, meaning they cannot be changed.
- MPRS gate closure will occur at 1530, meaning appointments will lapse etc if the business process is not at the appropriate step.

Guidance for running tests involving DCC

When executing test cases with DCC (CSS) steps:

1. If you are running a test case which includes CSS steps, the request is for participants to skip CSS in favour of the next Test Step/Test Party in ADO for BAU functionality, this should revert to the CSS message recipient.

2. For MDR Appointments (where DCC need to provide evidence), this would pass the Test Case to the DCC (DSP) which would allow us to gather all evidence before the Test Case is closed/moved on further.

3. If for BAU functionality the participant doesn't receive the CSS message, this can be raised as a defect.

Guidance for tests involving St Clements

When executing test cases with St Clements (REGS) steps:

1. If you are running a test case which includes REGS steps, if a successful response is received when sending to REGS, the request is for participants to skip REGS steps in favour of the next Test Step / Test Party in ADO.

2. If a response is not received (or the response received is unexpected, i.e. a different response came back to the one expected) then St Clements should be engaged to investigate their steps.

3. **Important** - a known exception to this are test cases that require D0350 messages to be generated / sent to begin the test case, for those the Test Case should be assigned to St Clements, and they will create the required message and progress the test case.

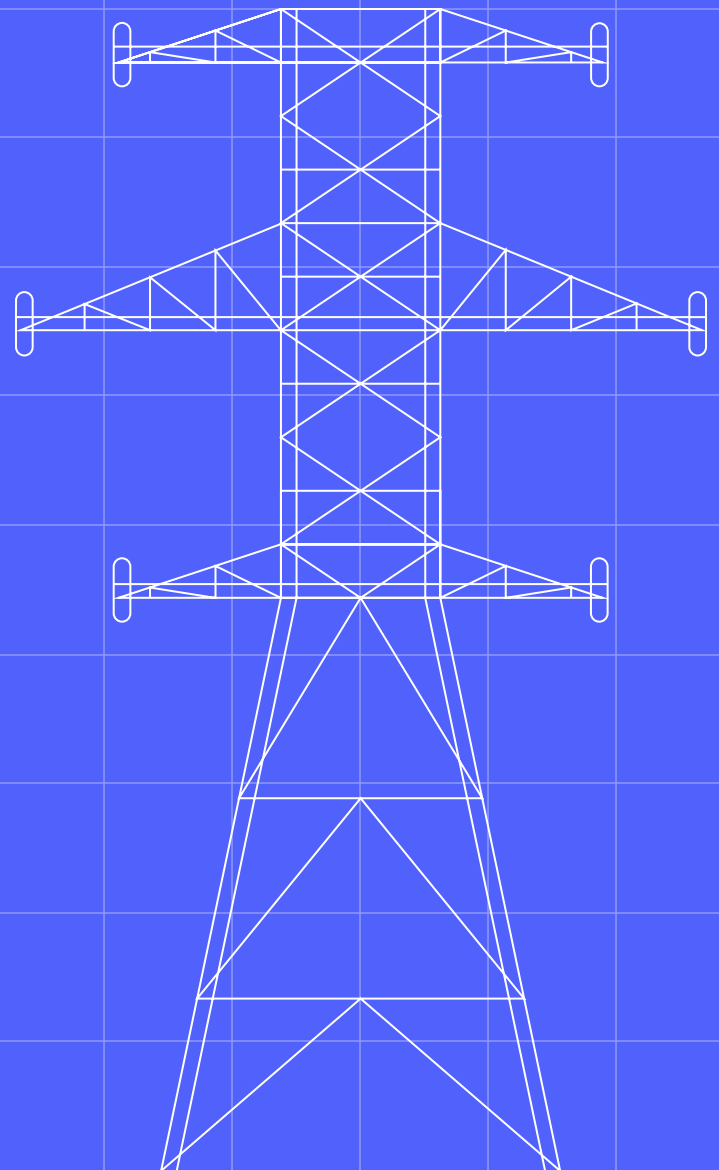
In the event of DTN Gateway issues

To all MHHS SIT Participants,

- If you experience a DTN Gateway issue please contact the ElectraLink Helpdesk (Electralink.Helpdesk@electralink.co.uk) first so that your issue can be evaluated rather than raising a defect on MHHS ADO.

- During the discussion with ElectraLink they will then be able to advise whether the issue is a configuration issue or a defect that then requires to be raised via MHHS ADO.

Defects



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How the Programme manages defects

The process map opposite articulates the MHHS Programme's **Defect Management Process.**

Triage:

- When a defect is raised by a participant, the defect will be reviewed by the Defect Manager.
- Defects will be triaged by the Testing Team to determine which 'resolving team' is required to resolve the defect.
- This will be determined at Daily Triage Meetings.

Assignment:

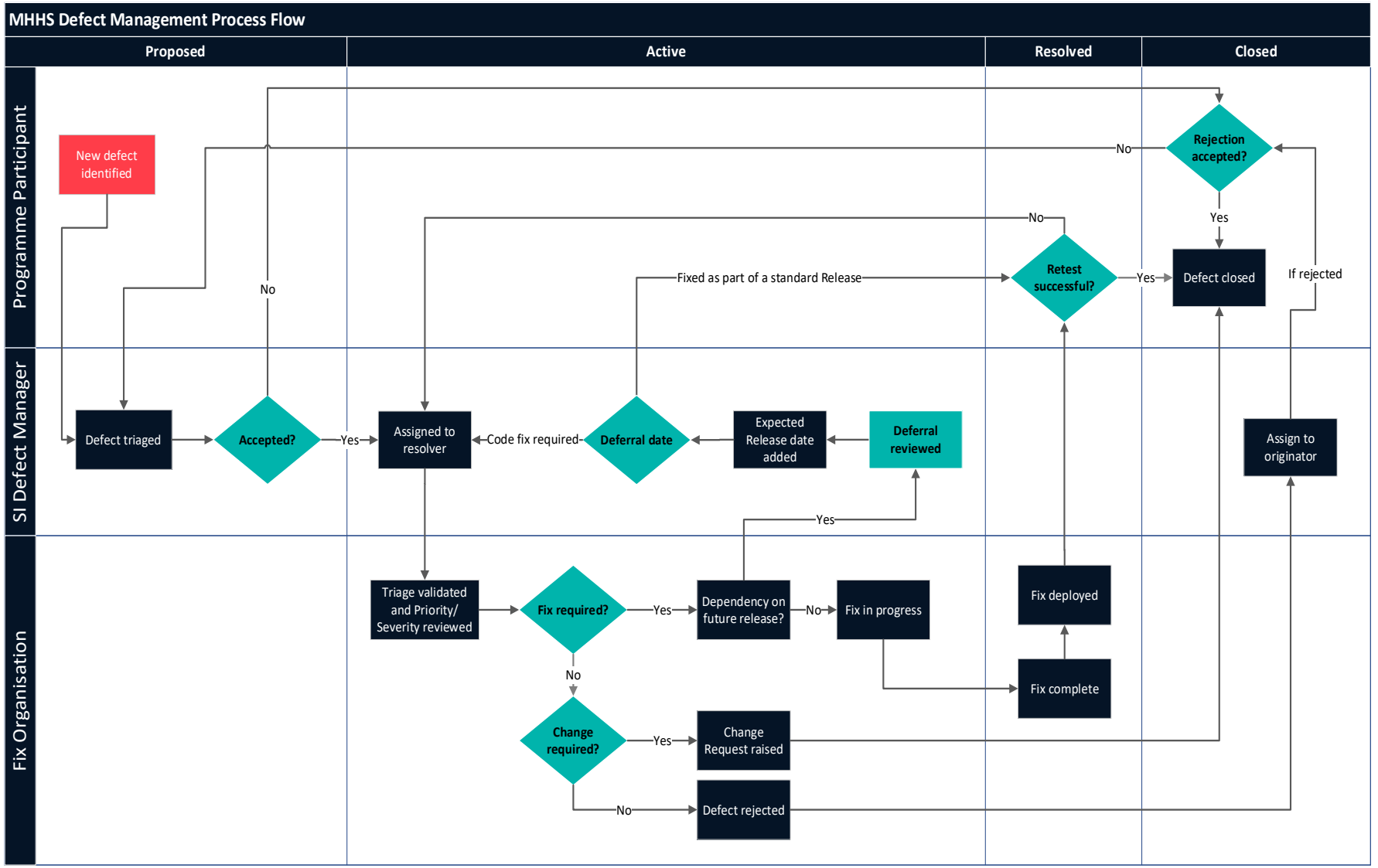
- Defects will be assigned to one of the Resolving Teams (Central Parties, Core Solution Provider, and SI).

Resolution:

- The responsible Resolving Team will undertake Root Cause Analysis to determine how to resolve the defect.
- When resolved, the defect status will be changed. The final status is 'Ready for Retest'.
- Defects are then bundled into a Release, and 'Request for Change' is submitted to the Test Team for Release Approval.

SLAs

- Defects resolutions are subject to SLAs. They begin when the defect is raised and allocated by Triage and end when it has been deployed.
- Please refer to the DM Plan, section 8.3 for details of the SLA Response / Fix Times applicable for Central Part defects.



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Key Defect Fields in SIT Functional and Migration

In order to provide the required Management Information (MI) for SIT, the following new fields have been added to the defect template in ADO. The disciplined use of some existing fields will also become critical.

New fields which are *mandatory* when a defect is raised (if these fields are applicable):

- **'Cohort'** is a new value, selectable from a pop list
- **'Participant'** will be auto-populated when the defect is created, the **'Participant Organisation'** is selectable from a new pop list
- **'Market Role defect Found in'** is a new value, selectable from a pop-list
- **'Market Role defect Originated in'** is a new value. This will help identify the target system for fix
- **'Impact Notes'** is a new free text field where any detail can be added to help assess impact which in turn will aid assignation of P&S
- **'Business Process'** is selectable from a pop-list, (previously not mandatory)
- **'Theme'** is a new value, selectable from a pop-list
- **'Cycle'** is a new field to select from cycles 1-3
- **'IF'** message number must be captured if it is applicable
- **'Resolver Received' (True / False)** tick-box has been added to support the CPO defect response times SLA's
- **'Remedial Action'** - a new free text box to allow CPO's to elaborate on defect root cause and resolution action taken
- **'Design Doc Ref / Swagger Version'** are new fields to record the version of the baseline documents effective when the defect was raised (non-mandatory)

It will become increasingly more important in SIT to manage expectations for target fix dates (to enable coordination in a logical and timely manner) and obtain MI around versions defects were Found vs Fixed In:

- **'Found In Build Version'** is a new field free text field which needs to be populated;
- **'Fix ETA'** will be expected to be used by Central Parties (CP's);
- **'Expected Release Date' / 'Expected Release Number'** - Will be populated as soon as is practically possible by CP's
- **'Actual Release Date** and **Release Version** – Population will be mandatory for each CP.

Raising Defects – What is needed

It is important to remember what is useful to include when raising a defect in ADO. This information will (1) Allow the defect to be Triaged by the SI Team and then by the CPO quicker and more effectively and, (2) Reduce the likelihood of the defect being 'Rejected'.

The programme is carrying out enhanced checks on defect quality prior to assignment to the triage team and where information is missing or ambiguous, these defects will be rejected and passed back to the raiser. The defects won't be progressed until they contain the missing required information or clarifications.

General	Area Specific
Description of Defect - Explain context and where appropriate, background to defect, in layman's terms, e.g. what was sent by whom, what was expected, what was received or not etc;	Raw Payload needs be attached where applicable (Request body - JSON format) For (Settlement), uncompressed reports to be attached
'Impact Notes' - add detail (shouldn't be an overly technical description) to help assess breadth of impact, both in terms of functionality and number of test cases failed or blocked, which in turn will aid assignation of Priority and Severity.	Synch responses received from DIP system must be attached where applicable
Design Docs – Ensure you are aware of the current Design Baseline and comply with the Swagger/DES138 for the correct construction of messages (Payloads)	Response Message Transaction ID's
Ensure your endpoints are set up in the DIP Portal prior to test	Sending party details / Sender Unique Reference
Ensure your URL is registered for Error / Response messages prior to test execution	DCP MPID or name if applicable;
Test Scenario / Test Reference, linked to Reproduceable Steps	DIP transaction IDs
Full Description of the failure, please provide as much detail as possible; including MPAN references where relevant (**not** MPANs)	**Secondary Routing:** If the message isn't arriving to your endpoints, provide screenshots confirming the endpoint set up in the dip portal and the DIP ID + Role you expect the message to arrive to.
Expected Outcome versus Actual Outcome;	Any known impacts (tests, flows, testing)
Evidence / Screenshots as evidence; including DIP Portal tracking where relevant	Any actions and their outcomes already undertaken to investigate or resolve issue
Attach exact response generated (e.g. for Portal);	

SIT Testing Design Defect Triage Principles & Checklist

- This checklist is to be considered when agreeing an approach on how best to fix defects presented by the Defect Manager at the daily Triage meetings.

- It should be noted that it may not be appropriate to rigidly apply these checks / principles and in certain circumstances some defects and their resolution may need to be assessed on an individual basis.

Have we agreed the type of defect e.g. Test scenario / script, software defect, Design defect, operability defect etc ?

Have we determined the effected Cohort Groups. Does the defect impact a single participant, a core participant, a cohort group or linked cohort ?

In respect of Design defects, the baselined design should be the measure on whether an issue is a defect against the design a gap in the design or a clarification.

The resolving party assigned should be responsible for clearly articulating the cause of defect and if necessary, providing options on how the defect may be resolved or workarounds applied

Resolution / Communication of the defect needs to consider the following

- Initially who are the Impacted Participants by the defect
- Is the defect clearly understood
- Have consequential impacts on other participants been considered
- Can the defect be fixed by a short-term workaround,
- Workarounds need to be clearly articulated in any comms along with associated operational timescales for the workaround ahead of a permanent fix
- Has the defect been corrected in a subsequent release (e.g. a IR5 defect already fixed in IR7)
- Consideration to any development and regression activity needed to be undertaken by participants
- Consideration to timing and implementation of the fix in relation to test cycles

Comms should be sent initially to those effected participants. Cohort group, then if appropriate to a wider participant cohort.

Clear communication sent detailing the implementation coordination including dates and feedback loops

Should an article be added to the Knowledgebase on the collaboration base

Arbitration of Priority Defects

There is likely to be examples of where two or more high priority defects need to be resolved at the same time.

With all cohort groups being given guidance around ordering this will hopefully mitigate scenarios where all participants and cohort groups being impacted by the same defect at the same time.

Where this does occur, the following should be used as guidance in determining the relative prioritisation in resolving the defects to minimise impact to delays in testing:

1. Are each of the defects clearly understood and root cause identified ?
2. Are each of the defects with the Core Participants or Design and therefore likely to impact all Cohort Groups ?
3. Are the defects impacting a Change of Agent / Supplier (COA / COS) and therefore impacting more than one Cohort group
4. Is the resolution effort understood for the defects ?
5. Is the resolution timeline of the defects clearly understood ?
6. Is there a short-term workaround for the defect known / needed ?
7. Are participants within a cohort group able to proceed with another stream of testing whilst a resolution is sort ?

Understanding and answering each of the above will help set the relative prioritisation in the resolution of the defect.

Escalation

Where high priority defect deadlocks remain, these will be taken to the daily 17:00 MHHS Internal Daily Stand Up
Ultimately it will be for the Programme to determine the prioritisation of a defect but may consult with the IPA if required.
Other considerations may feature into a decision process e.g. the ability to complete the testing of the end-to-end design, and progress to the next phase of testing.
Outcome of the determination will be clearly communicated to affected Participants and Cohort groups and FTIG

Approach to Handling Test Case Defects

Problem Statement 1 – During Cycle 1 any Test Case (script) defect no matter how severe resulted in the associated Test Case(s) being Failed or Blocked. However, it was observed that approximately 50% of Test Case defects were Severity 3 or 4, and did not necessarily invalidate the overall objective of the Test Case. This meant that where a Test Case defect existed, test progress was prevented, even if the defect was of a low severity e.g. a clear test case typo.

Problem Statement 2 – In Cycle 1 all test cases were pre-loaded in all relevant ADO project instances, this meant that when a test case defect required resolution, the fix would first be uploaded as a new version of the Test Case to the Master ADO project, then would need to be deployed to each relevant ADO project where the Test Case had been loaded. This process entailed many manual steps and was further complicated when the Test Case had been executed, as decisions would need to be made on how to action the change given the executed state. As the Test Case defect in-flow increased, this backlog of required resolution activity increased exponentially and resulted in longer resolution times for test case defect fixes.

Solution – to address these problems in subsequent SIT stages and cycles the programme will adopt the following policies:

1. **In the event of a Test Case Defect** - when a Test Case defect is raised, it will be first assessed in terms of 'Materiality' to the overall objective of the test case. If deemed 'Material' to the validity of the test case it will be prioritised for fix within the test cycle, and the associated impacted test cases will be either 'Failed', or 'Blocked' until the test case fix has been deployed. If deemed non-material, guidance will be provided back to the PP raiser with instructions on how to proceed with the test, noting that the test case defect had been encountered and linked to the test in ADO. Therefore 'immaterial' test case defects will still be planned for resolution but will no longer be an impediment for testing progress.

2. **Determination of 'Materiality'** – during the test case defect triage process the SI Assurance team will assess the defect and determine if its presence invalidates the objective of the test. If the test could proceed with documented guidance on how to avoid, or "workaround" the defect, this guidance will be provided to the PP via the '*Defect Workaround'* field. Defects of this nature will then be placed on a known issues list and published to SIT participants, so that if encountered they can also adhere to the same guidance to proceed with the relevant test(s).

3. **Audit Trail** – where a participant encounters a test case defect the programme still requires that a test case defect is raised; if it is deemed non-material and workaround guidance has been issued to participants, and the PP goes on to conclude that test with a 'Pass', we ask that PPs set the test to the *'Passed with Observations'* sub-status, noting the test case defect that was encountered in the mandatory '*Reason'* field that is required when this sub-status is selected. **Note** - where a PP uses the *'Passed with Observations'* sub-status, correct use of this status will be subject to Test Assurance review, and if mis-applied PPs will be asked to make corrective actions, which could involve failing the test.

4. **Test Case Deployment** - in the new sprint-based model, being adopted for SIT Functional Cycle 2 and SIT Migration, test cases will only be deployed to Cohort ADO project instances when they have been selected for assignment to the Sprint backlog (i.e. the current active sprint or the upcoming sprint). This will limit the effort, time and risk associated with deploying test case fixes, as a fix will only need to be deployed to the master ADO instance, and the Cohort ADO project instance where the test case is allocated, thus reducing the overall time required to resolve a test case defect.

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Test Case Defects Process Lifecycle

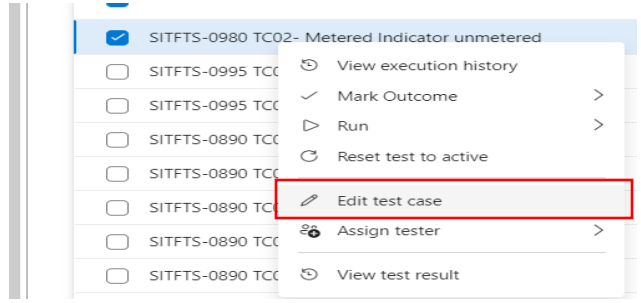
Step No.	Step	Owners
1	PP encounters Test Case defect	Participant
2	PP Pauses test case in ADO and raises a Test Case defect (at this point PP should not set the test case to Failed whilst awaiting the 'Materiality' assessment)	Participant
3	Defect is assigned to Defect Management for Triage and initial assessment of 'Materiality' and Severity and Priority.	Defect Management
4	Triage Team assesses 'Materiality' and sets Severity and Priority.	Triage Team (Including SI Test Assurance)
5	**If the defect is deemed 'Material' :** a) Defect Management will inform the PP to fail the associated Test Case(s) and move on to another test. b) SI Assurance will fix the test case and upload to the master ADO instance and inform defect management including details of what has been changed on the Test Case to address the defect. At this point they will also release any associated test cases for sprint selection. c) Defect management will inform the PP that the test case defect is ready for retest. d) SI Assurance to determine if the test case defect has broader impact to other test cases and inform the Test Coordinators if any other tests should not be selected into a sprint until the defect is resolved. **End of process**	Triage (inc SI Test Assurance) / Defect Management / PPC / Participant
6	**If the defect is deemed 'Non-material' by the SI Assurance team:** a) Triage Team determine the defect can be 'worked around' and provides the documented guidance for the PP on how to affect this workaround e.g. test case typo X is noted but confirmed should be corrected to Y in a subsequent test case version. They will then set the Priority to 2, or lower, based on the nature of the defect. b) Defect Management informs the PP that they can proceed with the test by employing the workaround. c) Defect Management will inform PPC that this is a known issue and publish this on the known Test Case issues log. d) PPC will publish the known test case issues list to participants via the Teams Channel (frequency TBC) e) PP continues with the test by employing the workaround, if the test concludes with a 'Pass' the PP is asked to set the test to 'Passed with Observations' and to reference the test case defect that was encountered in the reason field. f) SI Assurance fix the test case defect and upload the new version to the master ADO instance and inform defect management and the test coordinators including details of what has been changed on the Test Case to address the defect. **End of process**	Triage (inc SI Test Assurance) / Defect Management / PPC / Participant

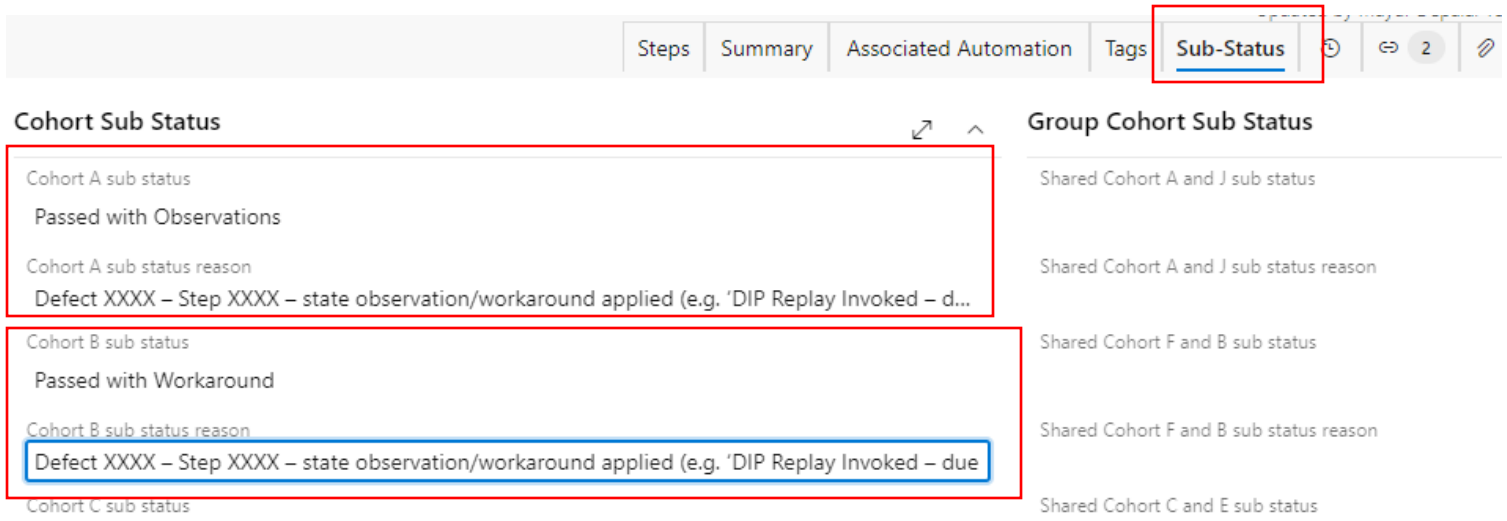
ADO Use Guidance – Passed with Observations or Workaround

In the event of a test case defect that is deemed 'non-material', and workaround guidance has been issued to participants, and the PP then goes on to conclude that test with a 'Pass', we ask that PPs set the test to the *'Passed with Observations'* sub status noting the test case defect that was encountered in the mandatory reason field that is required when this sub-status is selected.

To add a sub-status of '*Passed with Observation*', the PP must:

1. Open the define view of the test case by right clicking the test case and selecting "Edit test case"
2. Within the define view you will be able to navigate to the sub-status tab
3. Within this tab you can enter your cohorts workaround/observation reason from the drop down and enter the reason into the free text box
4. The reason must include "Defect XXXX – Step XXXX – state observation/workaround applied (e.g. 'DIP Replay Invoked – due to x reason…')"





Test Case Defect Materiality Assessment Criteria

Test step variance from technical implementation:

- Actions specified in steps are a correct interpretation of the design, but the implementation in a participant's system differs, and the participant can offer an alternative action/approach to progress the test to the next step.

- **Dispensation:**
  - Triage assesses and validates the alternative approach, i.e. it does not compromise the overall integrity of the test and its outcome.
  - Impacted PP records the actions taken, the outcomes and dencedence.
  - If successful, the test case is passed without condition.
  - No change required to test case.

Minor Non-blocking Error (typos):

- Test case contains a minor, non-blocking error (e.g. typo in an Event Code, role acronym error, DIP response code typo, CSS ID error).

- **Dispensation:**
  - Triage assesses and clarifies the correct text and instructs the cohort to proceed with the execution.
  - During execution PP records the value used or referenced against the test step, as asserted during the triage, and references the triage decision.
  - If successful, the test case is given a conditional pass, on the proviso that error is fixed in a future update, at which point the conditional status is solidified as a Pass.
  - Test Case is updated in a future ADO release P3/P4). Note the recommended re-test requirement will be provided on the defect, i.e. either a visual check on the new version of the defect or a re-run of the test case.

Blocking Error (invalid info):

- Test case contains a clear error that invalidates one or more steps, i.e. actions specified and outcomes are incorrect versus the design.

- **Dispensation:**
  - Triage assesses the bug scope and impact. For example, is it confined to one step early in the sequence of a test case with several steps. Triage assesses and determines the correct actions and outcomes that should apply. Triage determines whether those actions can be invoked without invalidating the rest of the test case journey, overall goals and outcomes.
  - If "Yes", triage stipulates the test is resumed with the invocation of the correct steps and expected outcomes; PPs capture said info against the step during execution, stating the triage guidance, including screenshots/logs that the actions and outcomes match the triage guidance.
  - Test is given a conditional pass on the proviso that test case defect is fixed as a matter of priority. Triage reserves the right to mandate a re-run of the corrected test case, covering the steps that were previously in error.
  - Test Case is updated as a matter of priority (P1/P2).

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Updated for Cycle 3

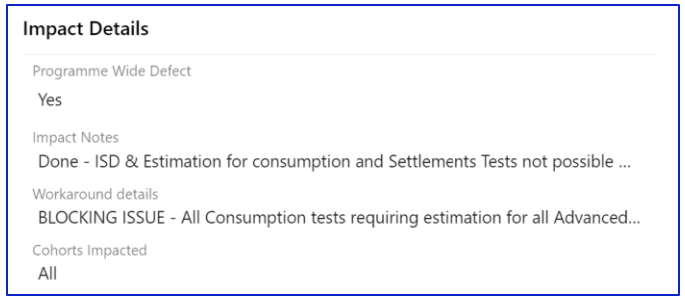
Defect Impact Assessment

Defect Impact Assessment Process:

- On a daily basis any P1 and P2 defects allocated to Central Parties or the SI Test Assurance teams are reviewed for Impacts, and possible workarounds are discussed.
- Questions asked during the Impact Assessment are as follows:
  - Is this defect blocking our Priority objectives?
  - Review and confirmation of the Themes / Business processes Impacted by the defect?
  - Does this defect impact specific Market Roles or multiples?
  - Which Test Cases are impacted by the defect?
  - Has the issue been seen before / is this a potential duplicate defect?
  - Confirm Test Case progress from other Cohorts? Is the same issue observed or Passed?
  - Can the test be completed or is this a Blocking Defect until resolved?
  - Should we be blocking other Cohorts from running the test(s)?
  - Is a Workaround available to complete the test case?
  - Do we need to link other tests in the same and/or other cohorts to the blocking defect(s)?
  - Is the Severity and Priority correctly assigned to this defect?

ADO details:

- After the Defect Impact Assessment meeting, the Impact and possible Workaround details are updated in the ADO defect record.



- These details are then shared with the test coordinators and made available in the Daily Defect Extract Report.

Defect Id	Title	Programme Wide Defect	Cohorts Impacted	Workaround details	MHHS General Impact
36348	[SITFTS-0315 TC04 - Method 3]- Not received Load shape data with loadShapeDomesticPremiseIndicator":true in IF-022 for Advance meter	Yes	All	BLOCKING ISSUE - All Consumption tests requiring estimation for all Advanced Domestic MPANs	Done - ISD & Estimation for consumption and Settlements Tests not possible without Load Shapes for Advanced Domestic Meters ONLY

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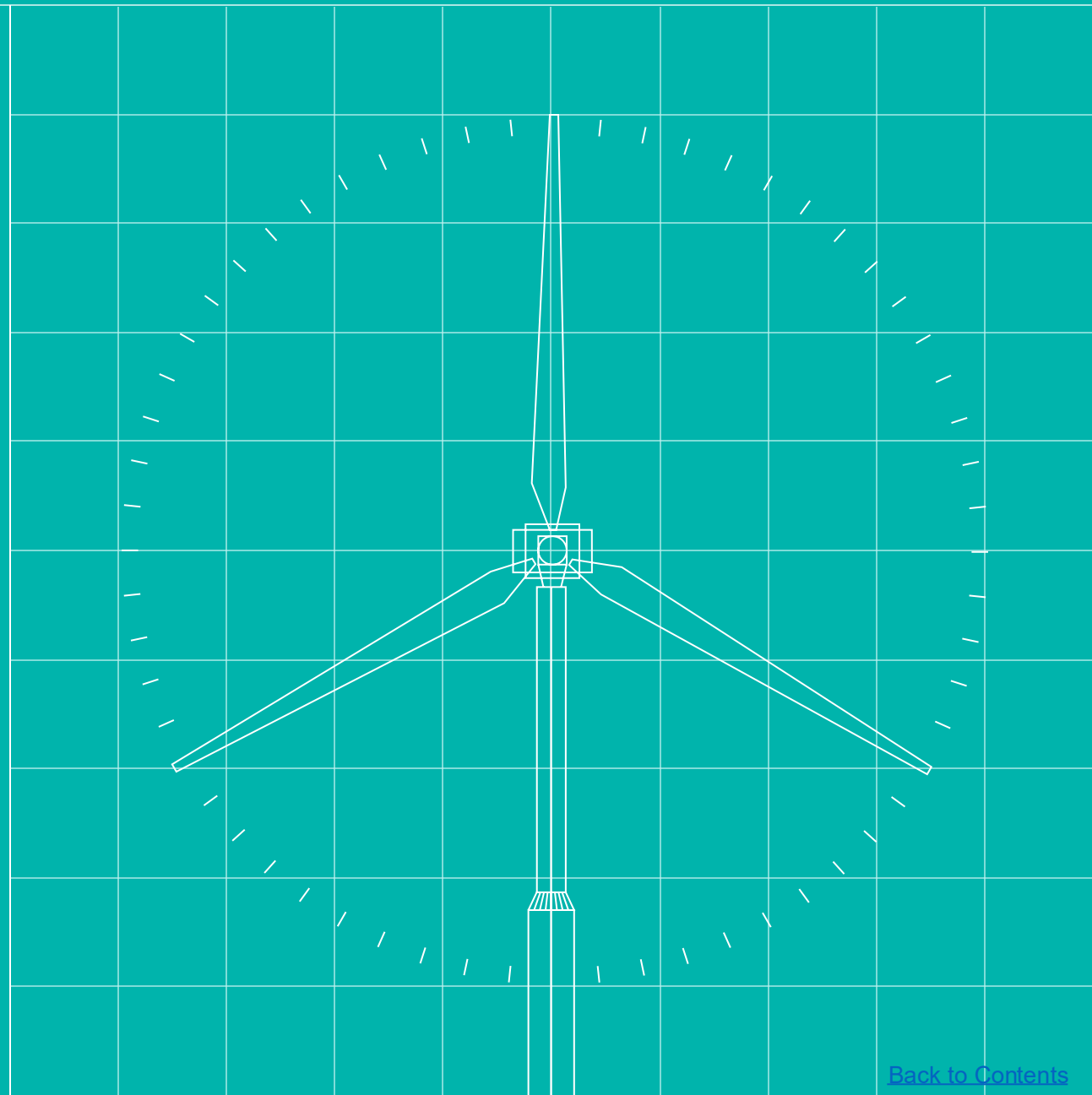
Test Evidence



MHHS PROGRAMME

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- Participants executing SIT will need to provide test evidence for their test steps in ADO. This evidence will be used during test assurance to validate actual vs. expected results of the tests. Test evidence is also critical for triaging defects.
- Note that this will be expected to be captured and uploaded into ADO at the point of test execution, or no later than the end of the business day, any exceptions to this timing of evidence upload will need to be specifically agreed with the SI. If an exception is agreed upon then any participant that the test case is handed over to must be made aware to not complete the test but leave it in a Paused state to allow the deferred evidence to be attached at a later time.
- Screenshots of the test system, messages, and/or electronic logs of messages must be provided as appropriate and should be annotated with the Test Case reference and test step they apply to (instructions provided in this pack).
- The evidence is standard for any test assurance process, and should be similar to participants own quality gate and internal audit

New for Cycle 3

Test Evidence Capture Policy

Programme Participants

- Test Evidence required to be captured at every point indicated within SIT Functional & Migration Test Cases, with any exceptions documented and agreed
- Each test step has a flag: Evidence Required? It will be marked Y or N.

Central Parties

- In the context of Test Evidence capturing, Central Parties include any Party that is supporting multiple test runs across all Cohorts.
- On the basis each of the 8 SIT Functional Cohorts have the same suite of Tests for execution, then Central Parties will be required to support the execution of at least 8 Test Runs per planned Test.
- Test Evidence capturing will be co-ordinated across the Programme, ensuring all relevant Central Parties are capturing evidence for the same 2 out of 8 Test Runs
- SI Test will forecast and communicate to Central Parties which 2 out of 8 Test Runs require evidence capture ahead of SIT Functional Test Commencement
- SI Test will, through daily SIT Management, remind Central Parties of Test Evidence capturing obligations against next days planned tests
- Similar to Cycle 2, Test Coordinators will communicate with participants during planning of each sprint to declare which tests need Central Party evidence and which do not.

Settlement Tests

- In the course of testing settlement, participants will be asked to capture evidence for all test steps related to Helix and LDSOs.
- These are the active parties under test, and all evidence is necessary for reconciliation and settlement.

Cycle 3 Changes to Evidence Capture

Programme Bilaterals

- Test Evidence cited in a number of bilaterals (though not all) as a key constraint in lower-than-forecast test velocity
- Anecdotal evidence from one supplier mentioned an average of 25 minutes spent per test step, primarily due to evidence capture requirements

MVC Trials

- High-touch programme oversight showed some steps were delayed by test evidence requirements, even when signposted in advance and resources were standing by
- Emerging theme around evidence capture burden – changes to approach and policy could realise further efficiencies

High Level Principles

- The Programme wishes to maintain as similar level of risk with respect to traceability and proof of functionality as possible to today's evidence capture policy.
- Evidence for every step in a test case may not need to be produced to prove the test passes and functionality is sufficiently exercised.
- Given the following prerequisites, we may be able to relax the programme's evidence capture rules
  - Detailed Expected Results for each test step
  - Proper Test Inputs
  - Engaged participants that are aligned on expectations and results
  - Exit points for each test, with participating market roles identified and expected results mapped

Cycle 3 Changes to Evidence Capture

Policy Change

Test evidence will be captured at the start of test execution ('Step 1'), with known expected results and input files.
Test evidence will be captured at each 'exit point' for the test script
Output files will be reconciled with expected results in detail and will need to match.
Other test steps ('interim steps') may not need evidence attached:

- The match between expected results and outputs show the interim processes working as expected
- Each test step will have a flag 'Evidence Capture' set to Y or N

Criteria for interim steps where 'Evidence Capture' may be set to Y.

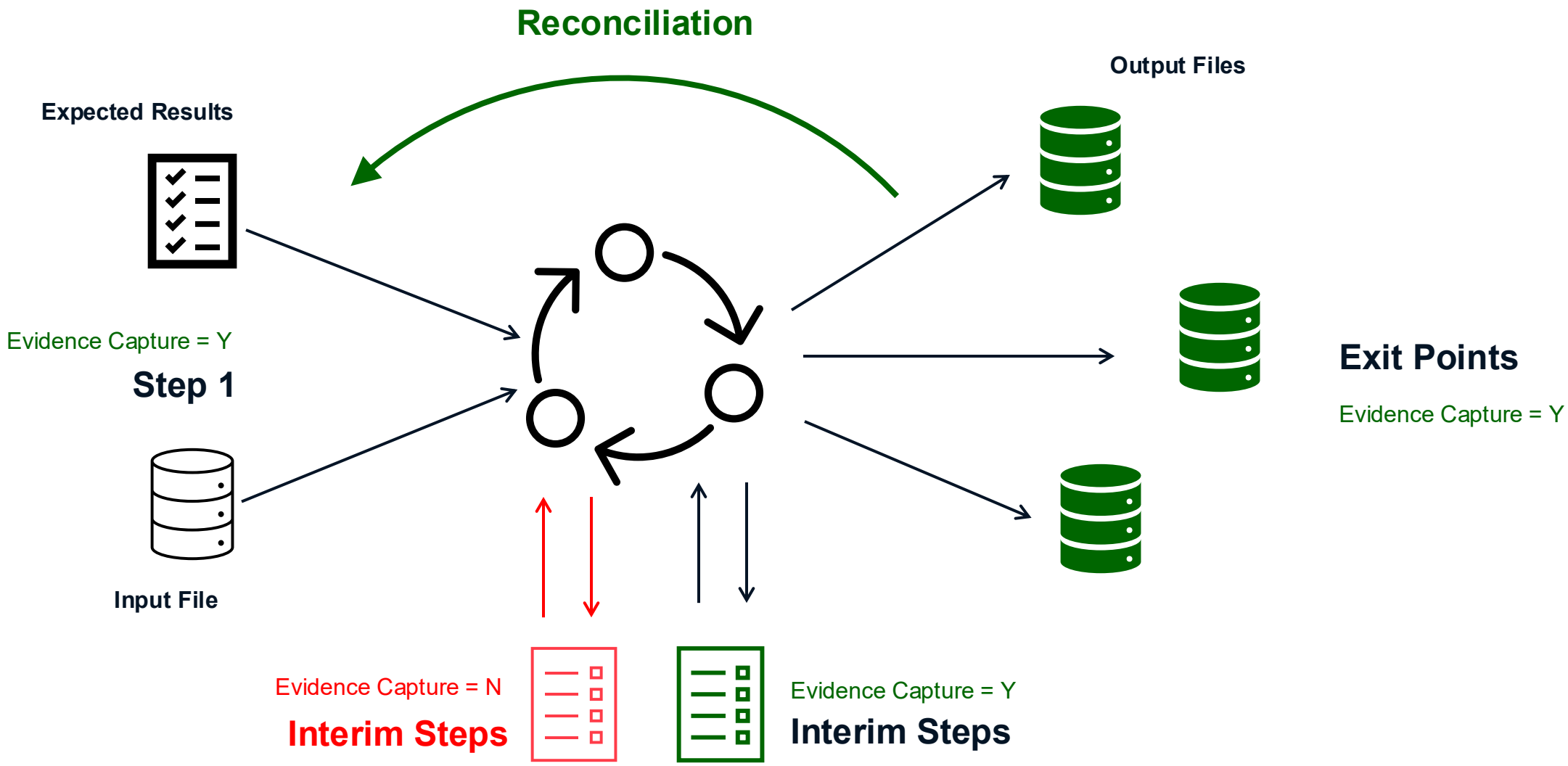
- Cross-referenced against design documentation and business process flows
- Code Body requirements for qualification evidence

Further criteria to be defined; for example, participants in the same market role across multiple cohorts. Please contact the Programme to work through evidence capture changes.

Process

1. Test Coordinators determine which tests are in scope for upcoming sprint
2. Test Architecture team runs through tests to determine exit points and criteria to be used
    a) Marks Evidence Capture flags appropriately
    b) Uploads test cases to ADO
3. Test Coordinators then assign tests to cohorts for upcoming

New for Cycle 3



Test Evidence Capture Examples

New for Cycle 3

Proof of Concept

- Three test scripts chosen:
  - 1 Small – 17 Total Test Steps (Evidence currently needed for all non-DIP steps)
    - **4 Evidence Steps**
  - 1 Medium – 27 Total Test Steps
    - **20 Evidence Steps**
  - 1 Large – 102 Total Test Steps
    - **50 Evidence Steps**

Cohort H	Cycle 2	Sprint 3	Run No. 9501
SITFTS-0050 TC03- Advanced			
Exit Point Steps:			
5	EES receives PUB-050 and updates its data		
11	PUB-002 received by new supplier		
14	REGS receives PUB-031 - Supplier Service Appointment Request from the Supplier.		
17	Supplier receives PUB -032 - Supplier Service Provider Appointment Request Response and waits for Acceptance		
20	AMS (Incoming) receives PUB-033 from the DIP		
23	REGS receives PUB-034 from DIP		
26	Supplier receives PUB-035 from DIP		
27	AMS (Incoming) receives PUB-035 from DIP		
30	REGS receives PUB-031 - Supplier Service Appointment Request from the DIP		
33	Supplier receives PUB -032 - Supplier Service Provider Appointment Request Response and waits for Acceptance		
36	ADS (Incoming) receives PUB-033 from the DIP		
39	REGS receives PUB-034 and determines processing treatment REGS Holds in appointment queue until appointment date reached		
42	Supplier receives PUB-035		
43	ADS (Incoming) receives PUB-035		
45	EES receives CSS02460 Status Change Sync		
46	REGS receives CSS02860 Status Change Sync and outputs IF-001 - CoS Notification.		
49	Supplier receives PUB-001 - CoS Notification		
50	LDSO receives PUB-001 - CoS Notification		
51	MDS receives PUB-001- CoS Notification		
54	Supplier receives PUB-036		
55	LDSO receives PUB-036 (If opted in)		
56	EES receives PUB-036		
57	AMSI receives PUB-036		
58	ADSI receives PUB-036		
61	Supplier receives PUB-036		
62	LDSO receives PUB-036 (If opted in)		
63	EES receives PUB-036		
64	ADS (Incoming) receives PUB-036		
65	MDS receives PUB-036		
66	AMS (Incoming) receives PUB-036		
70	EES receives PUB-050 and updates its data		
75	REGS receives PUB-007 from DIP		
78	Metering Service (Currently Appointed) receives PUB-008		
79	ADS (Current) receives PUB-008.		
80	EES receives PUB-008.		
81	MDS receives PUB-008.		
82	LDSO receives PUB-008.		
83	Supplier receives PUB-008.		
86	REGS receives PUB-005 and updates Metering and new registration data.		
89	Supplier receives PUB-006		
90	LDSO receives PUB-006		
91	EES receives PUB-006		
92	Metering Service (Currently Appointed) receives PUB-006		
93	ADS (Current) receives PUB-006		
96	Supplier receives PUB-041 from DIP		
97	LDSO receives PUB-041 from DIP		
98	Data Service receives PUB-041 from DIP		
100	Supplier receives dataflow D0268 with information of new meter installed		
101	LDSO receives dataflow D0268 with information of new meter installed		

Cohort H	Cycle 2	Sprint 1	9466
SITFTS-0390 TC01 - publish one entity			
Exit Point Steps:			
8	SUP Receives ISD Revision Notification from DIP which contains the URL to access the revised ISD		
	Notification from DIP which contains the URL to access the revised ISD		
	Notification from DIP which contains the URL to access the revised ISD		
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	Notification from DIP which contains the URL to access the revised ISD		
	e updated ISD data as required, this could be Master Settlement Timet		
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	s the updated ISD data as required, this could be Master Settlement Timetable, LLFs and ISD (including UMS). This will be via a web location on the Elexon hosting platform.		
24	UMSO consumer retrieves the updated ISD data as required, this could be Master Settlement Timetable, LLFs and ISD (including UMS). This will be via a web location on the Elexon hosting platform.		
25	LDSO consumer retrieves the updated ISD data as required, this could be Master Settlement Timetable, LLFs and ISD (including UMS). This will be via a web location on the Elexon hosting platform.		
26	REGS consumer retrieves the updated ISD data as required, this could be Master Settlement Timetable, LLFs and ISD (including UMS). This will be via a web location on the Elexon hosting platform.		
27	EES consumer retrieves the updated ISD data as required, this could be Master Settlement Timetable, LLFs and ISD (including UMS). This will be via a web location on the Elexon hosting platform.		

Cohort C	Cycle 2	Sprint 4	Run No. 12016
SITFTS-0305 TC07 - Advanced Meter where only SNAC is available			
Exit Point Steps:			
6	Supplier receives the PUB-022		
7	Supplier receives the PUB-023		
8	Data Service receives the PUB-022		
9	Data Service receives the PUB-023		

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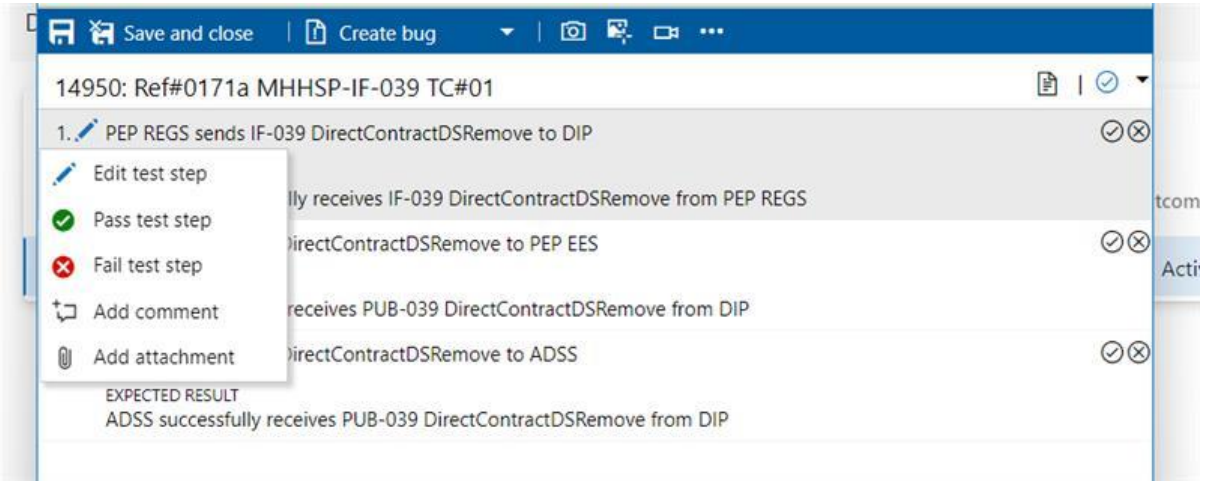
When you execute a set of test case steps allocated to your role you must capture evidence for those test step **in a word document with annotation** (See Template Attached / Embedded below)

1. It is important to ensure any payload sent is added to the evidence document as a .txt file
2. It is important to ensure that the response message from the DIP is added to the test case evidence pack as a .txt file
3. It is important to ensure that the test data MPAN reference number (**not actual MPAN, this must be obscured within all evidence**) is added to the first step as a comment to ensure all teams are aware of the test data in use
4. It is important to ensure that the test evidence pack is attached to the final step from the allocation to your role, each steps evidence should be annotated as per the template example and screenshots, or log files should be added
5. Once the steps are executed and the evidence is captured in the word document, please add evidence to a step in ADO by right clicking on that step and use the Add Attachment option shown below



SIT F Evidence Capture Template

Instructions for transferring Test Evidence in the event of a failed test case run in SIT

In SIT Functional one test case will have multiple acting PPs, in the event of a failed test step and defect being raised the test run will be set to failed and all evidence will remain in the failed test run.

In the event of the test case needing to be resumed from the failed step, the participant that is resuming the test case will be required to re-upload evidence from previous participants in the form of evidence pack attachments. Example below:

Scenario:

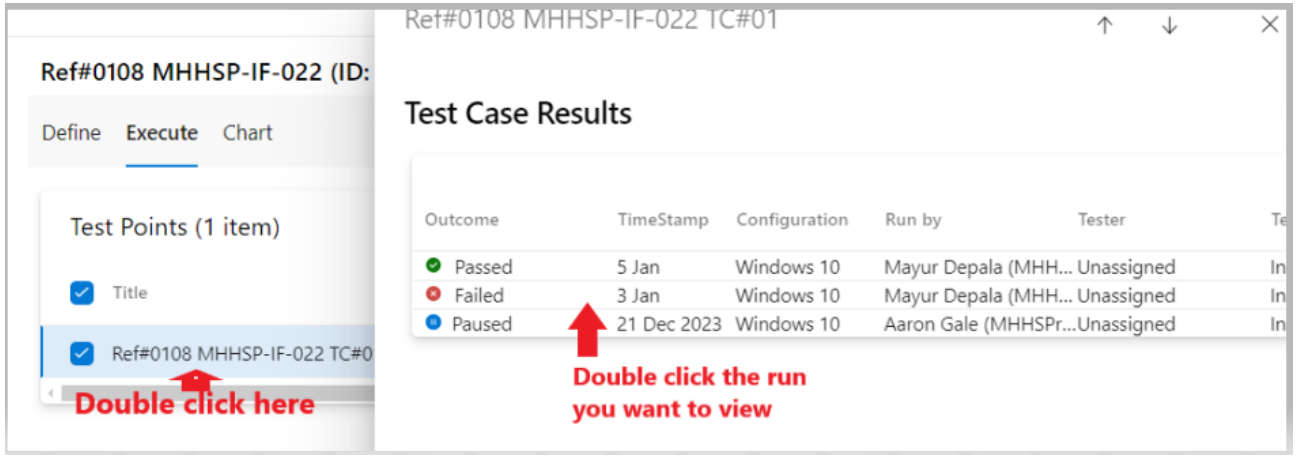
- Steps 1-15 are SUP steps, steps 16-22 are ADS, steps 23-35 are MSS. Test fails on step 25 and a defect is raised and the test case is set to failed by MSS.
- If the test needs to be continued from step 25 as the MSS have fixed the issue and can progress the test from the same stage, what do we do about the evidence that was captured in steps 1-22 by SUP and ADS as that is now in a previous failed test run as attachments and the new run will not retain the attached files

Solution:

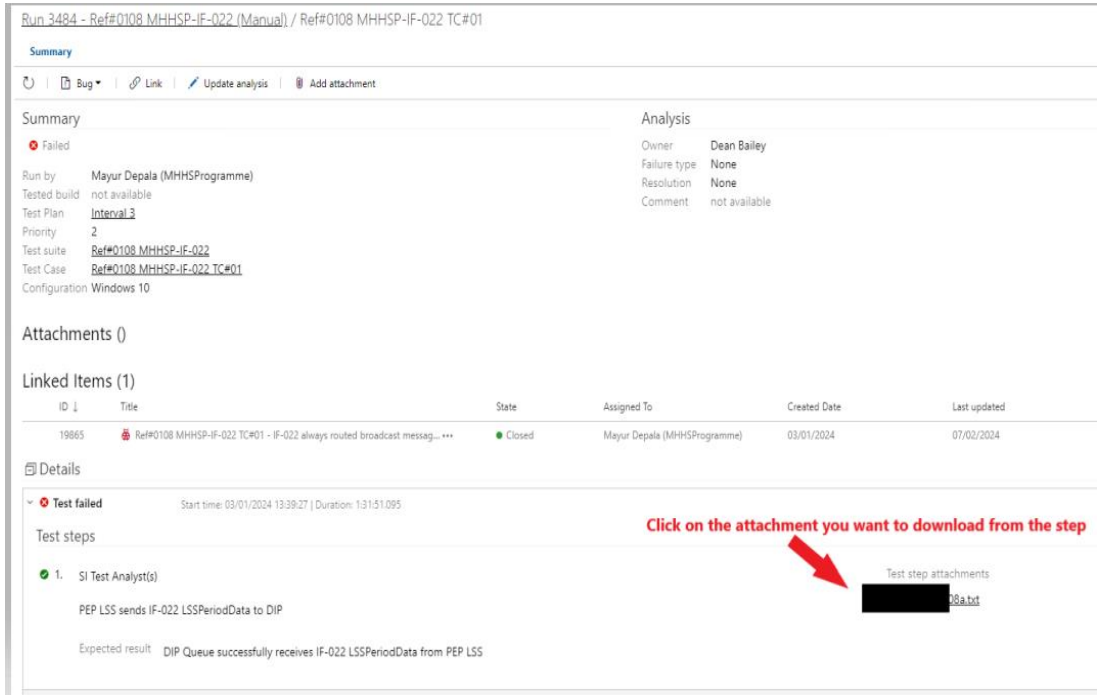
- ✓ All PPs must **attach their test evidence as word documents** onto the final step in their step allocation on a run, then pause the test and handover as per previous guidance
- ✓ If the test fails at step 25 for MSS and the run needs to be continued from this step rather than the whole test rerun from step 1 then the MSS will be required to go into the old run, download the evidence that the previous PPs have attached and upload this evidence onto the new run they are starting to ensure all evidence is maintained on a test run (see instructions on the next slide)
- ✓ Once the MSS steps pass then the test case will either be paused to handover to the next PP with all attached evidence or will be passed to complete the test
- ✓ This solution enables all evidence to be retained in one single test run as per a standard assurance process and supports upstream and downstream PPs to understand information being processed in SIT F

Instructions on how to view an old test run and download evidence

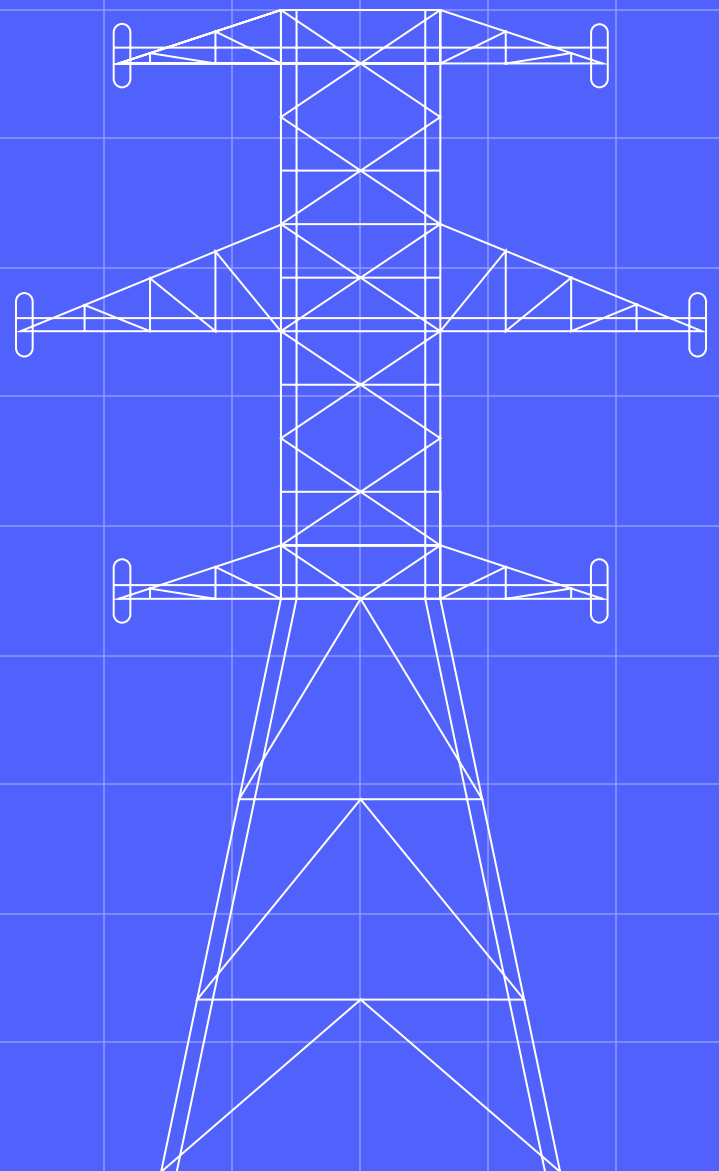
1. Viewing previous runs
   - Find the test case in question in ADO test plans
   - Double click the test case so view runs
   - Double click the run you want to view



2. Downloading attachments
   - The test run window will open with all steps visible
   - You can download any attached files on test steps



Release Management



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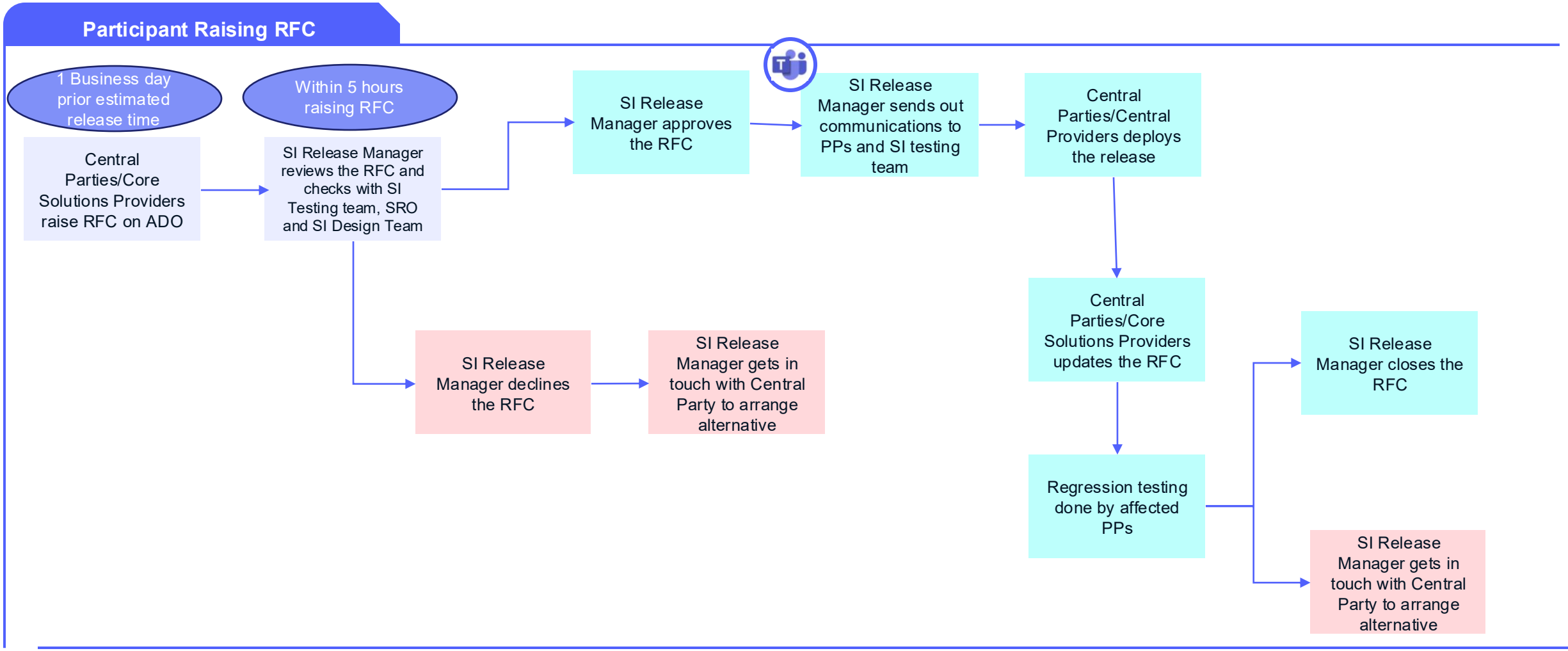
Release Management – Central Parties

All Central Parties / Central Providers would need to ask permission to the SI Release Manager by raising RFC in ADO. All the other PPs would need to raise RFC to keep the SI Release Manager informed. All Central Parties / Central Providers would need to schedule releases on Monday at 4 PM when required, environment outages for releases will vary dependent on content and will be communicated by Release Management to Cohorts

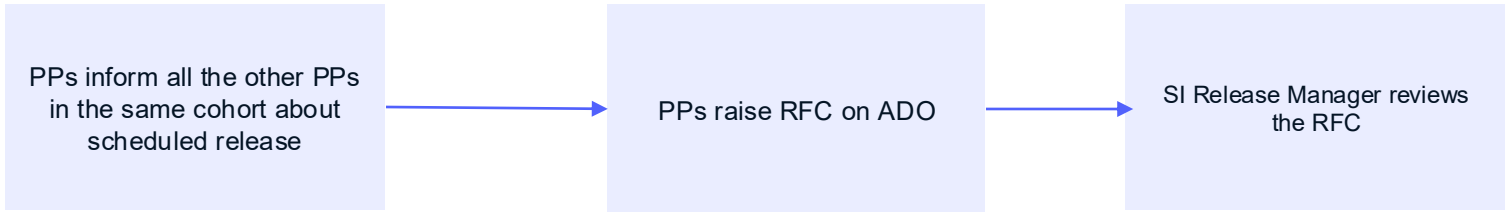


Release Management – Non-Central Parties

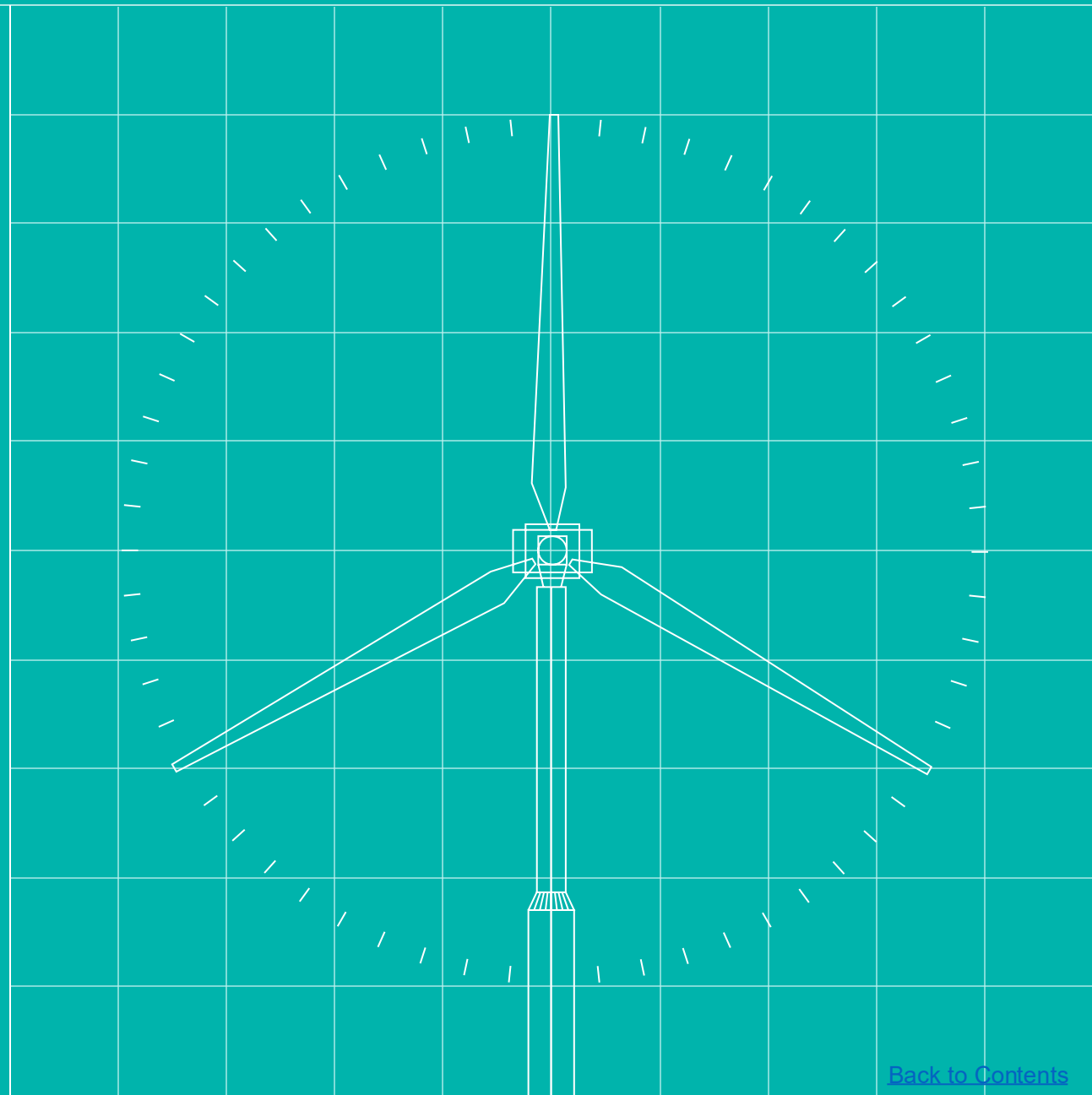
All Programme Participants (Non-Central Parties) should raise an RFC for each of their releases but this is an FYI rather than 'asking permission'.

Release Type	Definition	Frequency	Notice Required (Central Parties)	RFC Required in ADO
Major	Release of software that contains significant additions of functionality	Ad hoc	Several Weeks (Variable)	Yes
Minor	Release of software that contains minor additions of functionality	Weekly	1 Business Day	Yes
Patch	Release of software that bundles defect fixes, for example a scheduled weekly release of defect fixes.	Weekly	1 Business Day	Yes
Emergency	Release of software which contains a fix for a blocking testing defect that can not wait until the next scheduled Patch Release	Ad hoc	1 hour	Yes

Participant Raising RFC



Suspension and Resumption Criteria



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Suspension and Resumption Criteria

MHHS-DEL1259 SIT Functional Test Approach & Plan was published in August-23 following TMAG Approval. Section 7.2.8 of the Document introduces the Suspension and Resumption Criteria to be applied through SIT

Suspension and Resumption

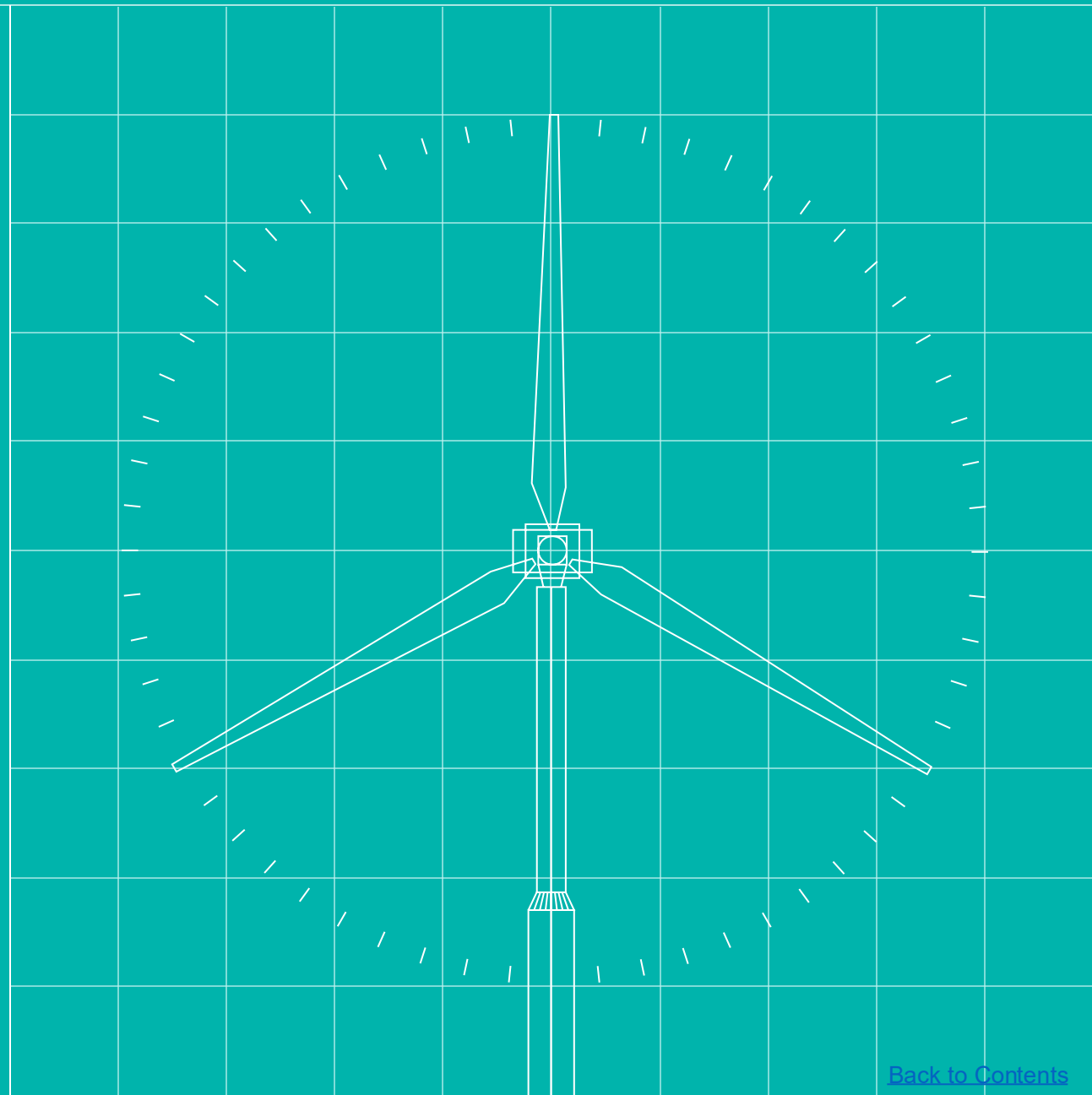
During SIT, any PP has the right to suspend testing where it considers necessary, by agreement with the SI team. Testing will only recommence when agreed between the PP and SI team. Where the SI team believes there are reasonable grounds to suspend all testing, this can be done by agreement with the SRO. In the case of any suspension the IPA and OFGEM would also be informed. should follow the process set out in the Defect Management Approach. In addition, all issues, prior to escalation, should be discussed with the SI Team.

Reasonable grounds for suspending testing may include any of the following:

- Application components are not available as scheduled.
- A testing issue prevents further useful testing from proceeding.
- A large percentage of planned test cases for a given day fail and significant root cause analysis needs to be undertaken to establish the cause. The outcome of any root cause analysis activity may result in testing being suspended.
- Test cases to be executed are in a “blocked” status due to an identified testing issue.

Where testing has been suspended, either the SI team or the PP (as appropriate) will produce a test suspension report reflecting the cause of the suspension and the actions to be taken by whom and when in order for testing to resume – the test resumption criteria. Testing will only resume once the PP has demonstrated to the SI team or the SI team to the SRO that the test resumption criteria have been met.

Test Exit



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Test Exit – Criteria and reporting

Updated for Cycle 3

SIT Functional & Migration Test Exit Criteria

In order to exit SIT Functional & Migration Test you and your Cohort will need to demonstrate that:

- ✓ All SIT Functional & Migration tests have executed, and the overall test pass rate is 85% or above or any exceptions are documented and agreed.
- ✓ There are no outstanding severity 1 or 2 defects, or any exceptions are documented and agreed.
- ✓ The number of outstanding severity 3 or 4 defects, within the following thresholds:
  - ✓ 10% of test cases allocated per Market Role x Severity 3 Defects
  - ✓ 20% of test cases allocated per Market Role x Severity 4 Defects
- ✓ Work-off plan for any outstanding defects has been produced and agreed.
- ✓ Test results and evidence has been captured in the test management tool.
- ✓ Defects have been captured in the defect management tool.

Note the above Objectives will be used as the criteria to measure the outcomes of SIT Functional and Migration Cycle 3

The below exit Criteria will be assessed at the end of the Post Cycle 3 Regression Test Cycle

- ✓ Any required regression testing has been successfully completed

Participant Test Completion Reports (*Applies at the end of the SIT Functional & Migration Test stages*)

As each SIT Functional & Migration participant **and** Cohort concludes their testing within the SIT Functional & Migration stage, they will be required to provide an individual Test Completion Report **within 5 working days of completing their tests.** This should include all exceptions and associated work-off plans.

The Programme will provide the Participant Test Completion Report format for all participants to complete.

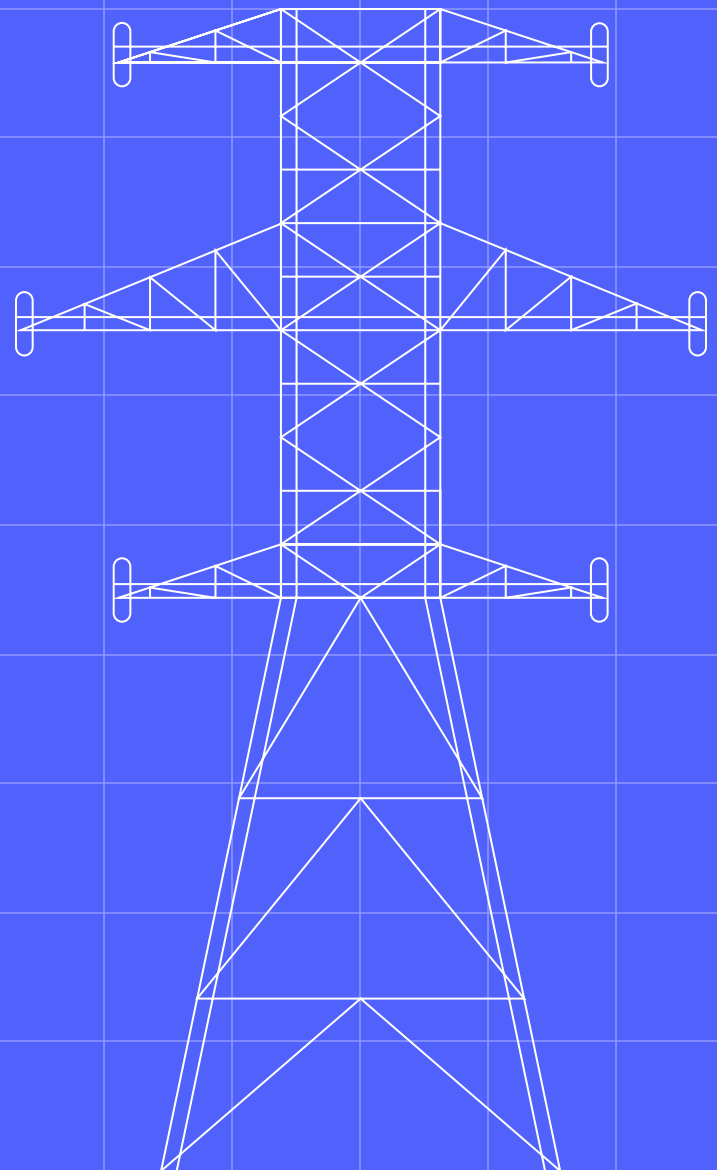
The SI will continue to be engaged in Test Assurance engagement and monitoring throughout the execution activities. However, the report will serve as a formal position at the point of SIT Functional & Migration Test exit governance.

SI Test Completion Report

At the end of the SIT Functional & Migration Test stages the SI will produce an overarching test stage completion report.

This report will form the basis on which governance approval of the completion of the SIT Functional & Migration stages will be sought via the MHHS Governance Framework.

Cohort Engagement Guidelines



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Cohort Engagement Guidelines (1 of 2)

During SIT Participants will belong to one or more cohort groups, these guidelines set-out expectations in relation to their expected participation and behaviour, the objective of these guidelines is to move through SIT testing in a way that avoids unnecessary delay

General behaviour of all participants is to:

- Foster an open and honest relationship within your cohort.
- Acknowledge commercial sensitivities between cohort members.
- Resolve differences in approach within the cohort before escalating to the Programme.
- Acknowledge the challenges of Core participants and the fact they operate in all cohort groups.

Attendance to Meetings

- Be punctual to cohort group meetings (it is acknowledged that not all participants need to attend all meetings).
- Come to the meeting prepared.
- Participate constructively allowing all member to express their thoughts.
- Address conflicts respectfully and professionally.
- Focus on solutions rather than opinion, and to move forward with testing.
- Persistent non-attendance to meetings that causes blockers should be escalated. If you don't attend collective decisions may be made without your input…

Participation on Teams Channels

- Contribute to cohort discussion and where appropriate contribute and acknowledge chat themes.
- Keep messages relevant to the team or channel's purpose.
- Start a new thread for new or off-topic discussions.
- When starting a new topic, provide sufficient context for others to understand (have a clear title for the post).

Cohort Engagement Guidelines (2 of 2)

During SIT Participants will belong to one or more cohort groups, these guidelines set-out expectations in relation to their expected participation and behaviour, the objective of these guidelines is to move through SIT testing in a way that avoids unnecessary delay

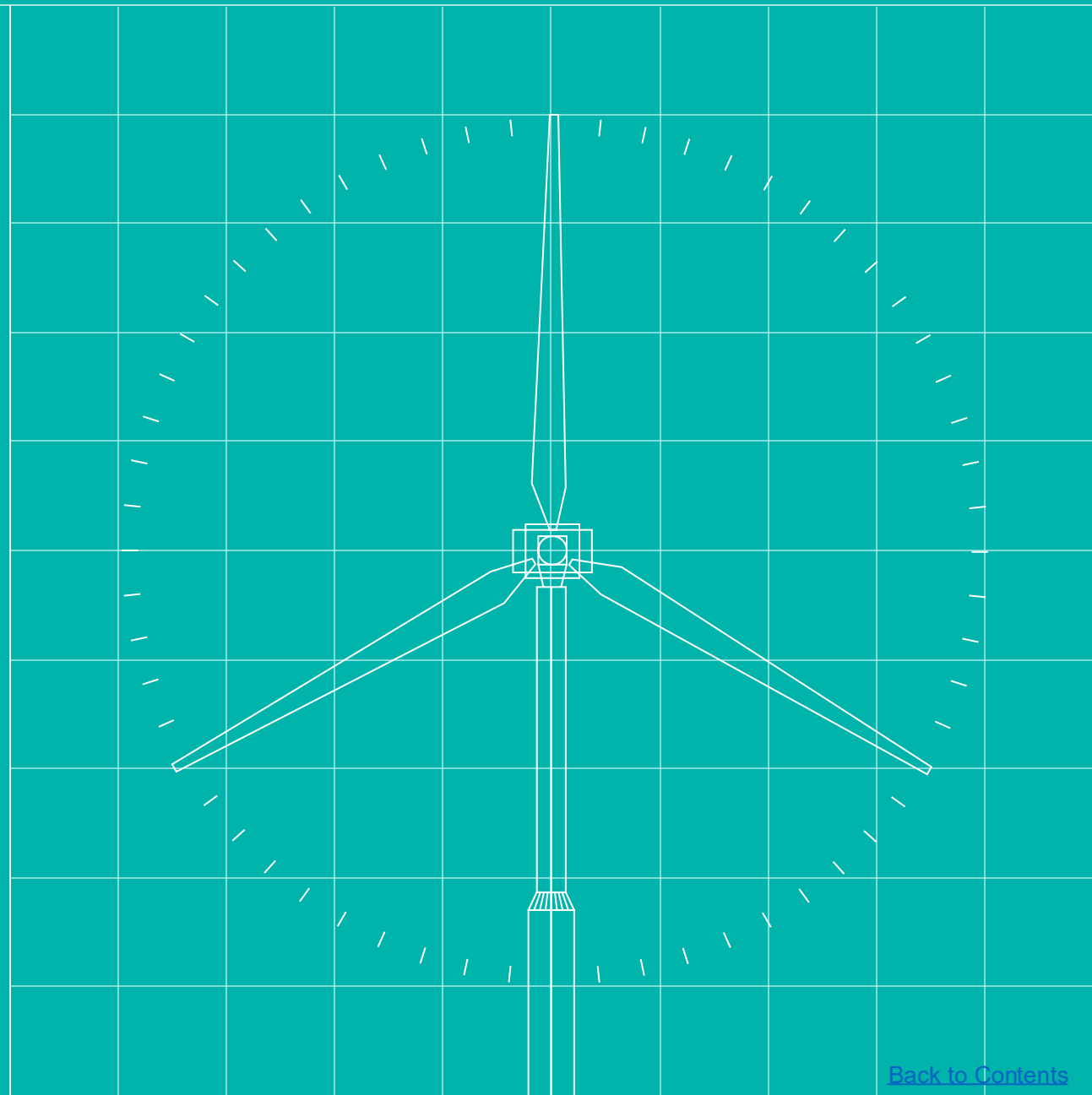
Commercial Sensitivities

- Acknowledge that some participants have existing commercial arrangements.
- Whilst cohort teams channels are private be aware of commercial sensitivities of other members, and sharing information across channels where you are a member of more than one cohort.
- Do not use commercial sensitivities as a blocker to resolve issues.
- Do not share information that may compromise your or another participants Intellectual Property.

Escalation

- Look to resolve issues within the cohort group.
- Reach out to the Programme to provide guidance prior to escalation.
- Where appropriate an escalation to the programme should also be communicated within the cohort group.
- Ensure escalations are timely and information about the issue is clearly articulated.
- The programme has the final decision on prioritisation to maintain cadence of testing.

Escalation



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Escalation – overall process -

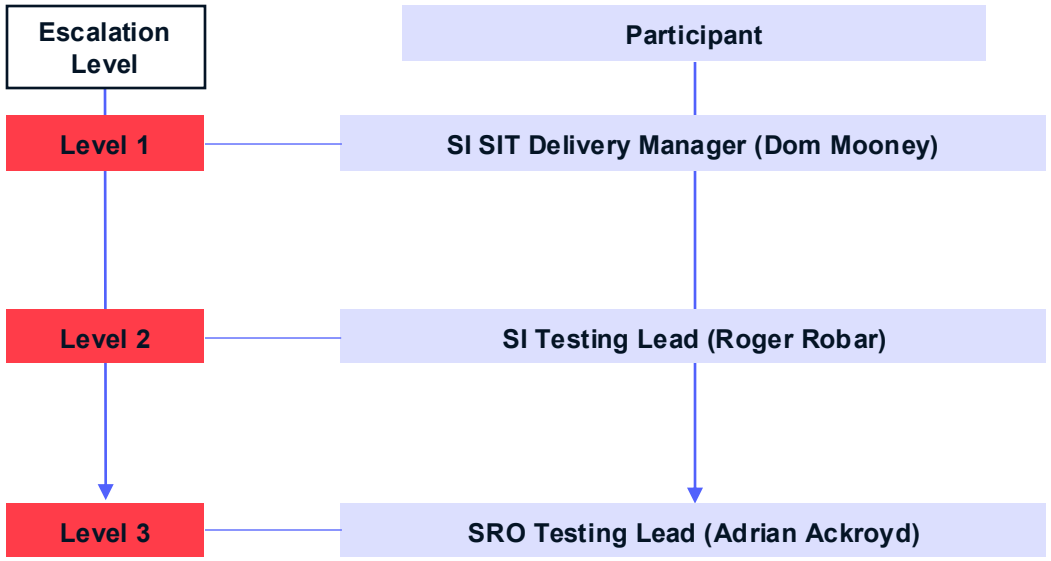
While it is the goal of the Programme to ensure a collaborative and successful approach to SIT Functional & Migration test execution, we are pragmatic in understanding that there may be instances where the Programme and participants are not in agreement. We have outlined a specific escalation process below. The purpose of this process is to ensure timely and satisfactory resolution that mutually benefits the Programme and participants, and allows for SIT Functional & Migration test execution to continue to progress.

In the first instance we urge that Participants attempt to resolve matters with their Cohort members and their SIT F & M Coordinator, however if this can't be achieved then please note that the below outlines the escalation route for participants. The following slide outlines a potential other route to escalation.

Testing Escalations

A Testing Escalation for example would trigger in the following circumstances:

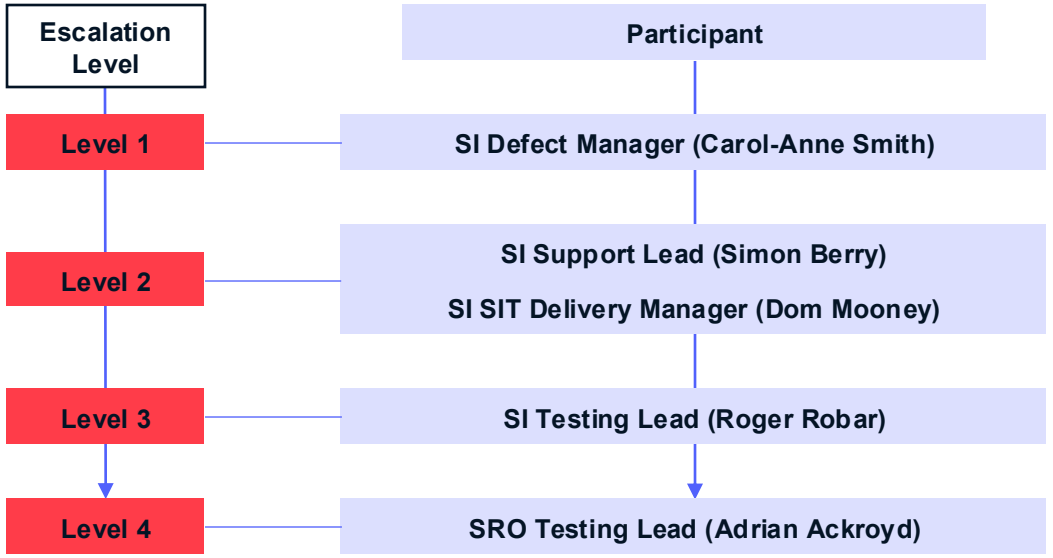
- Test Participant is blocked and requires additional support from the programme to resolve.
- Participant has an internal issue which may impact or delay their test execution completion.



Defect Escalations

A Defect Escalation for example would trigger in the following circumstances:

- The Test Participant and/or Fix Organisation response times are longer than target service levels.
- Failure to agree on the Target Fix Organisation; or
- Failure to agree on the defect severity or priority.



Internal programme escalations – The PPC

The previous slide outlines the primary route of escalation for participants. However, we understand that participants may wish to raise escalations with a separate party outside of the SI Testing Team. This is when the below, which primary outlines the role of the PPC Team, comes into effect.

During the course of your SIT Functional & Migration test execution, there may be times when you wish to **speak with an impartial member of the Programme** to discuss an issue which has not been resolved to your satisfaction.

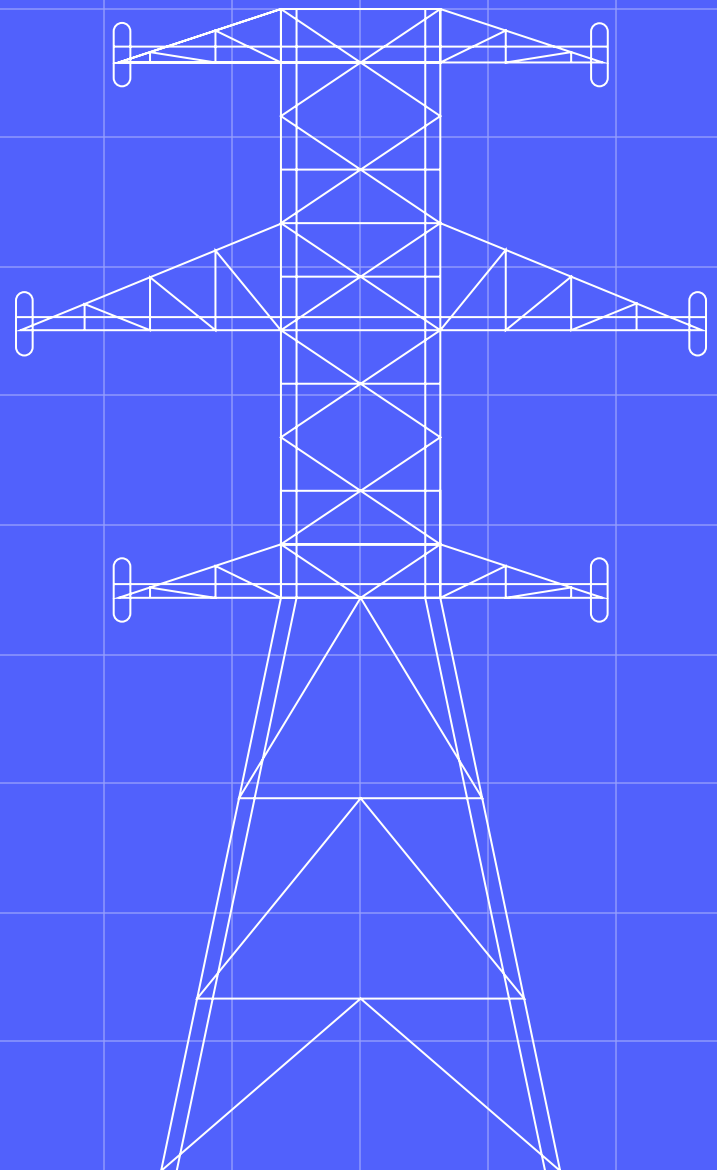
A dedicated member of our **Programme Party Coordination (PPC) Team** will be made available to hold these discussions with participants prior to any additional escalation.

In the instance where the PPC cannot facilitate a resolution, the dedicated PPC member will support the participant in raising a formal escalation.

PPC Role in Escalation

- Escalations for defects should follow the process set out in the Defect Management Approach. In addition, all issues, prior to escalation, should be discussed with the SI Team.
- However, we understand that participants may wish to speak with an impartial member of the Programme outside of the Testing Team on particular issues.
- In this instance, a member of PPC Team has been assigned to shadow the SIT Functional & Migration test execution, attend all SIT F & M test meetings, and are available to discuss issues with prior to formal escalation.
- The PPC Team member will focus on facilitating discussions between the participant and the Testing Team, and identifying and tracking actions to drive resolution, and ensuring accountability of action owners.
- Through this we will ensure participants can continue to focus on delivering the elements that they can deliver and remove their focus from resolving issues with the Programme.
- The PPC Team have direct experience in liaising between participants and the Programme and relaying any concerns or issues to leadership.
- The goal is to avoid delays to SIT Functional test execution and ensure that there are consistent open lines of communications between participants and the Programme.

Appendix A: Key SIT Functional & Migration Artefacts



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Key artefacts to drive SIT Functional execution

The Programme has produced a number of key artefacts which underly and inform SIT Functional execution. Understanding these artefacts will be central to successfully exiting SIT Functional. Our table below provides a broad overview of each artefact, and links to where they are stored on the MHHS Website and Collaboration Base.

SIT Functional Test Approach & Plan

The SIT Functional Test Approach & Plan details the associated objectives, scope, approach, schedule, management, governance and assurance of the SIT Functional Test Stage

Use in SIT Functional Execution: Participants should use the SIT F TA&P as their baseline knowledge for what will happen in SIT Functional Test, and use it to aid their planning.

Participants can find a copy of the SIT Test Approach & Plan on the MHHS Website.

SIT Test Data Approach & Plan

The SIT Test Data Approach & Plan provides a detailed view of the specific data requirement per participant role, including how test data is obtained and augmented.

Use in SIT Functional Execution: Participants should use the document to build a working understanding of what will be tested and how data will be provisioned for their assigned role and Cohort.

Participants can find a copy of the SIT Functional Test Approach & Plan on the MHHS Website.

Key artefacts to drive SIT Functional execution

The Programme has produced a number of key artefacts which underly and inform SIT Functional execution. Understanding these artefacts will be central to successfully exiting SIT Functional. Our table below provides a broad overview of each artefact, and links to where they are stored on the MHHS Website and Collaboration Base.

SIT Test Cases

The SIT Functional Test Cases outline the steps and instructions that participants need to follow to execute their SIT Functional.

Use in SIT Functional Execution: Participants will use the SIT Test Cases to deliver their SIT Functional Testing.

Participants can find a copy of the SIT Functional Test Cases on the Collaboration Base.

Defect Management Plan

The Defect Management Plan describes the overall approach to managing defects within the testing phases of the Programme.

Use in SIT Functional Execution: Participants should use the Defect Management Plan to ensure they are raising, triaging, categorising, and resolving defects in line with the Programme's specified approach.

Participants can find a copy of the Defect Management Plan on the MHHS Website.

Key artefacts to drive SIT Migration execution

The Programme has produced key artefacts which underly and inform SIT Migration execution. Understanding these artefacts will be central to successfully exiting SIT Migration. Our table below provides a broad overview of each artefact, and links to where they are stored on the MHHS Web site and Collaboration Base.

SIT Migration Test Approach & Plan

The SIT Migration Test Approach & Plan details the associated objectives, scope, approach, schedule, management, governance and assurance of the SIT Migration Test Stage

Use in SIT Migration Execution: Participants should use the SIT F TA&P as their baseline knowledge for what will happen in SIT Migration Test, and use it to aid their planning.

Participants can find a copy of the SIT Migration Test Approach & Plan on the MHHS Website.

SIT Migration Data Approach & Plan

The SIT Migration Data Approach & Plan provides a detailed view of the specific data requirement per participant role, including how test data is obtained and augmented.

Use in SIT Migration Execution: Participants should use the document to build a working understanding of what will be tested and how data will be provisioned for their assigned role and Cohort.

Participants can find a copy of the SIT Migration Test Approach & Plan on the MHHS Website.

Key artefacts to drive SIT & Migration Functional execution

The Programme has produced a number of key artefacts which underly and inform SIT Functional test execution. Understanding these artefacts will be central to successfully exiting SIT Functional. Our table below provides a broad overview of each artefact, and links to where they are stored on the MHHS Website and Collaboration Base.

Environment Approach & Plan

The Environment Approach & Plan (EA&P) sets out detailed guidance and requirements for the use and provision of testing environments during the Test Phases.

Use in SIT Functional Execution: Participants should use the EA&P to understand the expectations for environment managers to successfully execute SIT F, including ways of working, allocation and configuration.

Participants can find a copy of the Environment Approach & Plan on the MHHS Website.

Release Management Approach & Plan

The Release Management Approach & Plan (RMA&P) defines how the Programme will control release management throughout the Test Phases.

Use in SIT Functional Execution: Participants should use the RMA&P to ensure that they are prepared and can deliver for the planning, scheduling and governance of the releases into the test environments for SIT Functional Test.

Participants can find a copy of the Release Management Approach & Plan on the MHHS Website.

The Azure DevOps (ADO) Test Tool – References and guidance

The Programme is using ADO as the Test Management Tool. ADO has been configured to provide the following capabilities:

Test Management

- Driving test scheduling, coordination and execution.

Defect Management

- Raising a defect.
- Assigning a defect.
- Updating a defect.

Environments Downtime

- Provide a log of planned and unplanned environment downtime.

Release Management

- Request for Change (RFC).
- Governance of changes.
- Governance of releases centralised in MHHS Test Team.

Reporting and Dashboards

- For more information see the Reporting section of this guidance document.

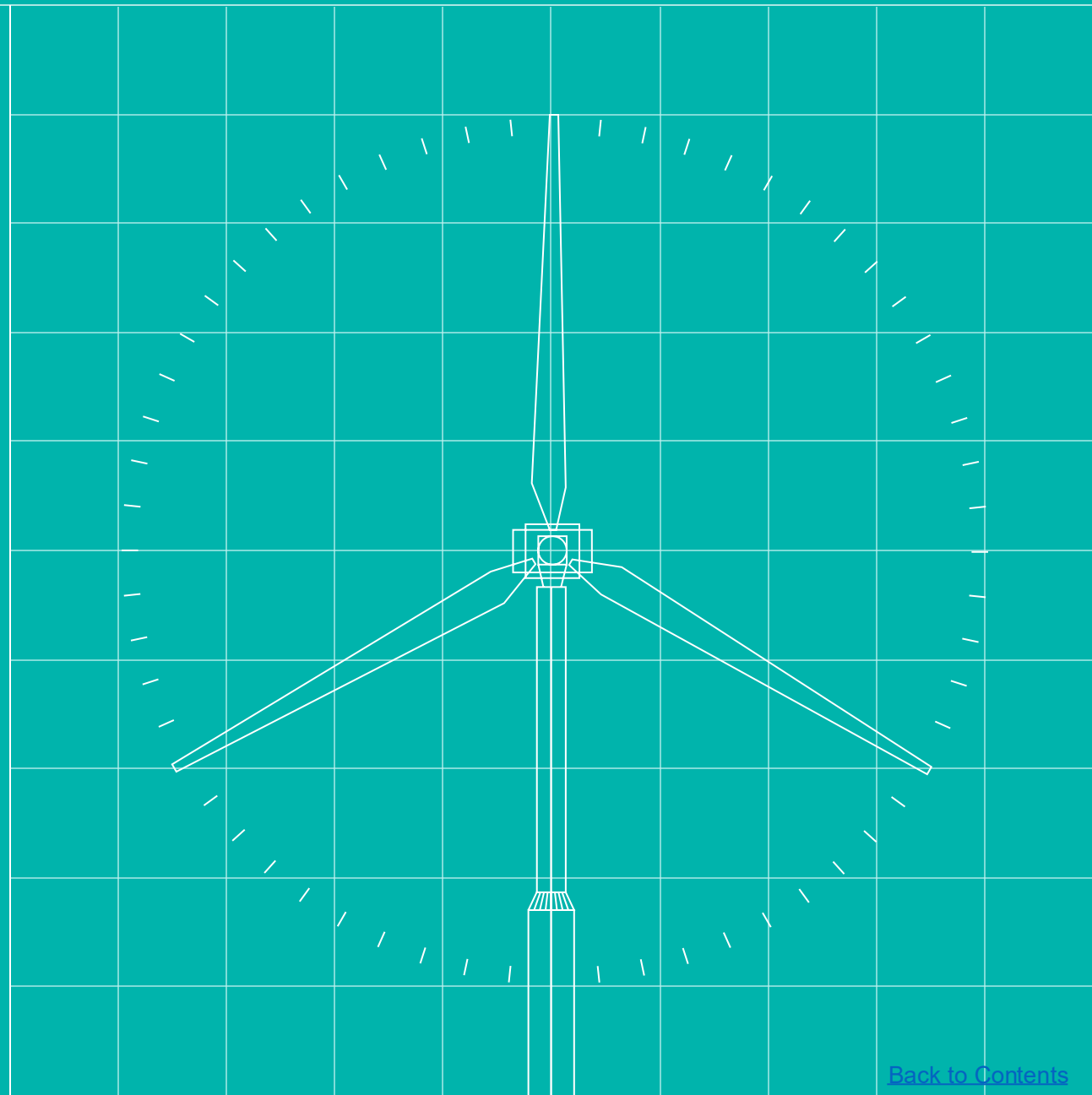
The ADO User Guide can be found on the MHHS Website. The Programme has also development Training Modules for these areas, also located on the MHHS Website.

Permissions and Access Requests	Executing Tests in ADO	**Defect Management**
Creating Queries and Dashboards	Release Management	Environments Downtime

Release Management Detail:

- A Request for Change (RFC) will be raised by Central Parties/Core Solutions Providers when they want to deploy a release.
- The SI Test Team will review the request and either approve or reject.
- There may be situations where a release from a Central Party/Core Solutions Provider conflicts with testing progress.
- This is why the Test Team will govern the release process.
- Central parties should provide 48 hours notice when requesting a Release. The SI will respond within 24 hours.

End



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