nationalgridESO

Single Markets Platform Show & Listen Session 14

Workshop date

21 07 22

Facilitators

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Agenda

1. Introduction
2. Update on SMP Release 2.0
3. Update on APIs
4. Update on Digital Signatures
5. Volunteers for User Acceptance Testing
6. Feedback

Rules

- This is your session to participate. Dig in!
- Use the chat function to ask questions.
- Use the mute button when not speaking.
- Avoid interrupting when others are speaking.

Your Participation Role

Throughout the session
Ask questions, share concerns, be patient, don't use acronyms or inside language

During activities
Read the explanations before we begin, good energy in = good results out

Remember
This session is part of the (good) work. We've never done this together before. Seek to understand before being understood

Mural Tips

NAVIGATION

Moving the board
Hold the space bar down then click and drag to move the pointer of the entire MURAL or your screen

Zooming in & out
Scroll the wheel on your mouse or pinch on your touchpad to zoom. Note: When changing devices you may need to check **Over Settings** in the bottom right.

The minimap
Track your view of the MURAL and zoom percentage in the minimap on the bottom right corner of your screen

ORGANIZING

Select Objects
Click an object to select it, hold shift while clicking objects to select more than one at once

Move Objects
Click and drag the objects you wish to move, simply drag them to the desired location on the MURAL

CONTRIBUTING

Sticky Notes
Add sticky notes by right-clicking, then selecting **Add Sticky Note** or by double clicking on an empty space on the background.

2 Update on SMP Release 2.0

Latest status of Release 2.0 and reminder of key functionality

0:20

Key highlights

Introduction of two new functionalities:
1. Unit \ Asset Versioning
2. User Management

Go-Live targeted first week of August and the SMP webpagewill be updated with a specific user guide and video. We shall also be offering drop in surgeries in early August. You will also be supported by your Account Management team who have already been in contact with impacted users to determine who should be identified as each organisations super user.

Unit \ Asset Versioning

There are two different types of Unit \ Asset Versioning built in SMP:
- Automatic versioning - the system will automatically version based upon a defined criteria e.g. the Total Generation Capacity on Unit Version 2.0 field is < than the value on Version 1.0
- Manual versioning - the Unit Manager user will manually trigger versioning through a series of actions e.g. update the assets aligned to a unit, submit for approval and update the services.

A recap on why you would undertake Unit \ Asset versioning is:
Update an existing unit –
- Increase / decrease capacity
- Change in agent/ registered service provider relationship
- Add/ delete assets for a particular unit
- Change fuel type

- When changes are made, then a cloned version of the unit/ asset is created with an 'Effective from' date aligned to it
- The unit will be created in 'Draft' status if there is any increase in assets/ capacity.
- If a unit is versioned and it is already aligned to a service, then the relevant service record will also be cloned with the status as in the original unit.service record.

Known bugs / observations:
1. **Upon clicking the 'Create New Version Unit Custom Button" - the screen takes up to 1 minute (depends on broadband speed) to process the action and open the Unit Details screen, please do not click the "Create New Version Unit Custom Button" again as this will cause duplicate records of the draft Unit. A fix for this observation will be implemented towards the end of August.**
2. **Unit versioning only displays correctly on screen when using the "Google Chrome" web browser.**

User Management

Self-service capability to the Registered Service Providers to manage access and permissions for their users.

Registered Service Provides to allocate a Super User Role on the Portal to an existing Portal User

Registered Service Providers should have nominted the user's name via email to the Contract Management Team.

Super User will be assigned additional features to enable them to create new portal users for their company.

Existing Access Permissions will be decommissioned for all Portal Users once Release 2.0 goes live.

The different user group types and permissions is illustrated in the table below.

User Group	Description
Admin User - Group 1	Able to add users to Company Account, able to update User's details, Able to activate Users, Able to Freeze Users, Able to enable access for locked out users.
Unit Manager - Group 2	Able to Create or Register or Update Assets, able to create or register or update Units, able to align assets to a unit, able to version units and assets, able to pre-qualify Units and submit pre-qualification data.
Entity Manager - Group 3	Able to accept an request for a Agent to act on behalf of a Service Provider, able to initiate a request to act as a Agent for a Service Provider, able to view other Accounts or Service Provider Units or Records (agent), able to act on behalf of a Service Provider, able to withdraw an Agent or as an Agent on behalf of a Service Provider.
Finance Manager - Group 4	Able to update or edit or view financial data for own Account, able to view and update Settlement data.
Authorised Signatory - Group 5	A Director or Duly Authorised Signatory for the Service Provider or Agent, able to sign on behalf of the Service Provider/Agent adherence to National Grid ESO Terms and Conditions or Procurement Documents.

Questions

Feedback

3 Update on APIs

Latest view on API development

0:20

Key highlights

Development commenced for API - 1. Manage Assets (enables a Registered Service Provider to create/update/delete multiple assets and API - 2. Manage Units (enables a Registered Service Provider to create/update/delete a single unit).

Aiming to share API technical specifications at the beginning of September and then invite Registered Service Providers to participate in User Acceptance Testing in October.

Review Questions and seek clarification

Questions

Feedback

4 Update on Digital Signatures

Opportunity to understand the new process

0:20

Digital Signatures

Installation and configuration of Conga (digital signature solution) has been completed. Now integrating Conga with SMP and aiming to implement Digital Signatures by the end of August.

Step 1: User will complete Pre-qualification Screen as standard for the Unit in question

Step 2a: User is prompted for name of Authorised Signatory under a new section entitled 'Terms & Conditions'

Step 2b: User selects the Submit Button for E-Signature Process to initiate and to confirm the Pre-qualification submission by portal user is complete

Step 3: An automated Email is sent to the Authorised Signatory with instructions for E-Signature capture

Step 4: Authorised Signatory is prompted for e-signature on a 'tailored' Terms & Conditions document populated with Unit specifics

Step 5: Signed Document is automatically stored

Step 6: Automated Email Notification Sent to original Portal User upon signature completion AND internal notification sent to the Contracts Team to confirm Pre-qualification submission is complete

Review Questions and seek clarification

Questions

Is there only one Authorised signatory? Sometimes we require 2 wet signatures
Oliver

Feedback

5 Volunteers for User Acceptance Testing

Call for help

0:20

Request for a focussed group of volunteers who can be reached out to conduct the UAT testing for our releases
Expect 1-2 people across organisations to help
Provides us a great opportunity for co-creation; Has been immensely useful for SMP releases.

It will involve:
An hour of your time in 1 month
Project team is available on the call to help with testing data and test cases, if required

Review Questions and seek clarification

Questions

Feedback

6 Feedback

Opportunity to provide instant feedback

0:20

Please post what we did well:

Please post what we could do better:

Actions