nationalgridESO

Connections Portal Show & Tell Session 1

Workshop date:

Facilitators

Greg Hunt (Chair), Adam Tear (Product Owner), Vikas Garg (Product Lead), Nicola Ward (Delivery Manager), Suzi Bell (Business Analyst), Mark Stone (Software Engineer III)

Agenda

1. Introduction / Expectation Setting — 5 min
2. What is the Connections Portal — 5 min
3. What is MVP? — 5 min
4. Demo — 25 min
5. Test Environment — 5 min
6. Next Steps — 5 min

Rules

- This is your session to participate. Dig in!

- Please use the post it function in Mural to ask questions (more on that below) or the Chat function if you prefer (please however don't use the Chat function for any discussion - just the questions!)

- Mural link will be in Chat now - there is no required sign up but please enter your name before entering the board (this way we can associate the feedback with yourselves.

Your Participation Role

1. **Throughout the session:**
   Ask questions, provide feedback, share your ideas, raise concerns, try not to use acronyms or minute language.
2. **During activities:**
   Follow the instructions please use the Chat function, we will be asking people to review what's coming in.
3. **Post Event**
   We will provide you with all necessary information for post event activities (testing) and how to feedback to the team.

Mural Tips

Navigation

Moving the board
Click and drag to move the canvas around. Use the mouse wheel or and drag to move the canvas up and down and zoom in and out.

Zooming in & out
Scroll the mouse wheel to move in and out. Use your trackpad to zoom in and out. When changing devices you may need to turn **Zoom Settings** in the toolbar right.

The minimap
Click the map icon in the top right, and zoom percentage on the minimap at the bottom right corner of your screen.

Hotkeys/shortcuts
Select Objects
Hold down the shift key and click to lock shift while choosing objects to select from more than one at once.

Move Objects
After selecting the objects you want to move, simply drag them to the desired location on the BUNs.

Sticky Notes
After selecting the sticky tool, double click **AND** drag to create a sticky note. Double clicking on an already placed sticky note highlights it.

---

1 — 5 minutes — Greg Hunt (Chair)

---

2 — 5 minutes — Greg Hunt (Chair)

What is the Connections Portal

As Part of our NIC12 window, We will build a new Connections Portal in conjunction with the Digital Engagement Platform Investment to provide a single user experience.

This Connections Portal will transform the Connect& Journey and account management for all customers.

The Portal will provide a single point of contact for connections to electricity networks and it will guide Customers through the Connections Process and provide accurate management information.

The Connections Portal will:

- **Digitise the connections application process**
- **Enable Customers to monitor their live applications and progress against them**
- **Provide Customers with access to their contract documents and contract history**
- **Enable Customers to provide milestone / project updates**
- **Provide other useful Connections resources**

---

3 — 5 minutes — Greg Hunt (Chair), Vikas Garg (Product Lead)

What is MVP?

As Part of our NIC12 window, we are building a new Connections Portal in conjunction with the Digital Engagement Platform Investment to provide a single point of contact for connections to all customers.

The first stage of the build is focus on the Connections Journey and account management for all customers. This is our Minimum Viable Product (MVP) and it will include the following functionality:

- Customers can create an account in the system in the form of a Connect& Account, which will be the single place for all Connections related activities. Our Customers will be able to access their Connect& Account using a Gov.uk Verify Account.
- Our Customers will be able to create a Connection Application, which will be a digitised version of our current application form. Our Customers will be able to save their application and return to it at a later date, they will also be able to upload supporting documents to the application.
- Our Customers will be able to see the status of their application, and they will be able to see any milestones we have agreed with them.
- Our Customers will be able to see the contracts we have issued them, they will be able to download these contracts and they will be able to see a history of contracts they have had with us.
- Our Customers will be able to see a history of their connections with us, including any completed connections, their MPANs, their connection sites and their contacts.

Our Customers will be able to see a dashboard of their live applications, which will show them the status of their applications and any milestones we have agreed with them.

Our Customers will be able to see a dashboard of their completed connections, which will show them their MPANs, their connection sites and their contacts.

? — 10 minutes — Greg Hunt (Chair), Adam Tear (Product Owner), Vikas Garg (Product Lead), Nicola Ward (Delivery Manager), Mark Stone (Software Engineer III)

Participation 1 - Q&A Opportunity

- Please use the Post-its below or Chat function in Teams

Questions

Considerations:
- Is there anything that we haven't addressed that you think should be included in the Scope of the Connections Portal?

We use grid consultants as will they be able to access our portal and see the progress of their offering(s) with number grant access to grid consultants to a specific SPV project and not our whole portfolio.

We often set up Special Purpose Vehicles for our developments, will we be able to groupe these up so that all connections under our Parent Company Login so its all visible in one place?

Could the portal be used for other business units? Such as Gas? Or even water? Just wondering if there is a possibility of having one SPOC

Will there be any interaction with the ESO portal?

Is there scope to actually transitioning this as a product to be used by other operators by PRS & TOs for their connections data and process ?

It sounds for the process to be successful it must be very well integrated, which it currently isn't. Presumed work is underway to address this in request for progress

What will happen when a project changes control for ownership, or is sold to another company? Can that be transferred to the new holding company?

How will this integrate with other portals being developed by the DFNOs and GBSO ?

Will the portal be able to store all documents and chasers that need to be sent as part of the application?

Will the portal have a function to store and monitor wayleaves, or even a chance alert

Will the system be able to cope with Novoloop's, e.g. customers who engage for a particular project/ scheme, but contract/ account holders stay the same?

Will portal show what is happening behind the scenes, for instance when an application is being processed by NGESO and when it has been logged NGESO issuing an offer or the contract ready?

Will it be possible to raise technical queries regarding offers via the portal?

Will Portal notify Stakeholders/Managers milestones?? will it be possible to accept Offers (signature) via the Portal

Will the current process be still available if customers do not like to switch to digital portal

---

4 — 5 minutes — Greg Hunt (Chair)

Demo intro

- Introduction - what we will show you
- What we've built so far and why
- We will be taking pauses after each step of the Demo to provide the opportunity to ask questions and/or feedback. Please use the feedback section to the right and add your post-its in the relevant sections, ie if your feedback is about the pre-application stage please put them at the area.
- The Chat function is also open in Teams to use also.

Registration and Login :
Registration, Login
Password Reset
Reset Password
Restricted User Access

Pre-Application :
Submit Pre-App
Pre-App withdrawal
Notification

Direct Connection:
Submit Application
Calculate App Fee

Track progress from Clockstart to Offer signed

All other connection types:
Submit Application
Calculate App Fee

Track progress from Clockstart to Offer signed

NEXT DEMO PHASE

---

20 minutes — Greg Hunt (Chair), Suzi Bell (Business Analyst), Mark Stone (Software Engineer III)

! — Greg Hunt (Chair), Adam Tear (Product Owner), Vikas Garg (Product Lead), Nicola Ward (Delivery Manager), Suzi Bell (Business Analyst), Mark Stone (Software Engineer III)

Participation 2 - Feedback and Questions on Demo

Registration

Will there be a limit on the number of users per company?

Will system cope with same email address for different companies? Will the system be able to cope with Novoloop's, e.g. company name Novoloop Ltd, Novoloop Limited, Novoloop Limited (Company Number 12345678)

Can the registration form be completed and log out and then come back later to finish off or does it all need to be done in one go?

Is it possible for draft pages to have a more useful reference name rather than an autonumber (similar to the above) applications grid?

Is this portal used for applications in all three TO areas?

Can a user create multiple applications at the same time (multiple tabs)?

Is there an issue if a user creates a connection application, but then a second user creates application for the same site? Can one application be set up the same design?

Is it possible for draft pages to have a more useful reference name rather than an autonumber (similar to the above) applications grid?

Will the portal have a function to store and monitor wayleaves, or even a chance alert

Login / Logout

Does the MPA phone number need to be created using the same email address as the connections portal account ?

Is there an option to add multiple users to one registered business, as there are a few members of our team?

Will we have same access for multiple companies?

Reset Password

Is there a way of resetting passwords - user works for that company in terms of security?

Why is the number of users limited?

Create additional Users

Can a super user change name in the super-user ? Or is if someone is leaving the company ? Perhaps a right-click make super user option. ?

What happens if a colleague is the first to sign up - but doesn't know the super-user? Or they are deleted another colleague promoted to super user?

Not here but should be a way to see the number of users in the system and who they are

Pre-Application

During application process, if there is the need to submit additional information or new information, can this be done in the portal and this be done via the current process (email CCM etc)

Withdrawing and deleting a pre-app

---

5 — 5 minutes — Greg Hunt (Chair), Vikas Garg (Product Lead)

User Testing Plan

UAT Scope

New Account Registration
- Searching an organisation using name and/or registration number
- Registering up to 5 user to an account with one super user and 4 standard users
- Approval / Rejection of standard users registration requests
- Login, Password reset and Login help
- Email Notifications

Pre-Application
- Creating pre-application
- Saving as draft
- Edit saved pre-application
- Submit pre-application
- Withdrawal of pre-application
- Deletion of saved pre-application (excluding submitted & withdrawn)
- Email notifications

Please note -
- Currently an email address can only be used **once** for registration
- You will need Salesforce Authenticator app as part of registration process
- First registered user be super user & subsequent users will be standard users

Testing Schedule and help

- User testing - **25th February - 4th March**
- Assistance available throughout the duration of testing via email - **box.eso.cpp.test@nationalgrid.com**
- Customer Portal test environment link and help guide will be shared via email post event.
- Feedback Mural board link will also be shared via email post event. (We will quickly demo the board now).

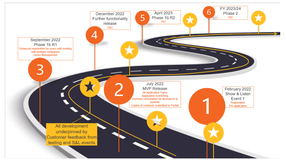
Our Asks

- Please try to test all the functions as per the scope and
- Provide as much feedback as possible.

---

6 — 5 minutes — Greg Hunt (Chair), Adam Tear (Product Owner)

Future release road map



THANK YOU FOR YOUR TIME