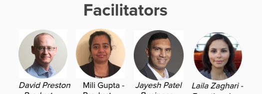
nationalgridESO

Single Markets Platform Show & Listen Session 27

Workshop date

05 10 23

Facilitators



Agenda

1. Introduction — 2 min
2. Update on Releases — 5 min
3. Feedback on Onboarding checklist requirements — 5 min
4. Walkthrough of Global Versioning customer journey UX Designs — 30 min
5. How to assign a "Trader role" in SMP — 5 min
6. Feedback — 2 min

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

1. **Throughout the session** Speak up, think big, raise concerns, be patient, don't use acronyms or inside language.
2. **During activities** Ask clarifying questions before we begin, good energy in - good results out.
3. **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 position of the entire MURAL on your screen

Zooming in & out
Scroll the wheel on your mouse or pinch on your trackpad to zoom in/out. When changing devices you may need to check **Zoom Settings** in the bottom right.

The minimap
Track your view of the MURAL and zoom percentage on 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
After selecting 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 or the background.

2 Update on Releases

Latest status and reminders

5 min

5th October - Release 2.9

1. Digital Engagement Platform (DEP) CIAM Technical Go-Live - introduction of **Customer Access and Identity Management System** (CIAM) which will allow both prospective users to register and existing users to login using a **Single Sign-On** functionality which will have authentication built in. Users will be expected to log in using their email address and use a Mobile Phone Number to authenticate.
2. SMP support to EAC Go-Live - support on "Trader role" and integration between SMP and EAC.

17th November - Release 2.10

1. Global Versioning (including Asset Versioning Phase 1) - this be in a beta environment to allow a Unit Manager / Entity Manager to version a Unit or an Asset to improve track and document changes over it's lifecycle.
2. Pre-Qualification Phase 1 - a Proof of Concept to explore if out of the box Salesforce components can be utilised without the need for custom development.
3. Balancing Reserve Service - configuration of the new service on the UI Portal for onboarding.
4. Read API - Allows the Unit Manager to view their Asset details and Unit details.
5. User and Account Management - following feedback from multiple Registered Service Providers enhancements to adding Unit Manager Read Only Access to Trader Role, Secondary Users can have the Default Unit Manager Role removed where a 'User' is only required to act as Authorised Signatory and the Super User can clearly distinguish these Authorised Signatories from Active ('Licenced') Users.

Key Reminders

DEP CIAM Changes as per September's Show and Listen

We emailed you last week with details of the changes to the way you sign into SMP. This is a reminder that this will change from Friday 6 October.

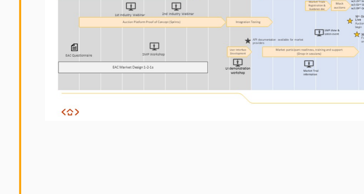
First time sign in
- You'll need to reset your password (select the forgot password link and enter your email address)
- Register your mobile number to enable two-step verification.

Subsequent sign ins
- Sign in with your email address (not your old smp username) and your new password
- Enter the verification code that we'll send to your mobile number. You will no longer need to use the Salesforce authenticator app

The URL/web address for SMP is not changing.
If you have more than one SMP account and username then you will sign into your primary account with your email and continue to use the existing usernames for secondary accounts. We will have contacted you about this directly.

Single sign on
- Your new sign in credentials will also give you access to manage your Data portal subscriptions by signing into your ESO account dashboard from the main ESO website.
- They will also give you access to EAC when it launches later this month.
- If you are also a user of the Connections portal then the way you sign into the Connections Portal will not change for now. We'll be adding this to single sign on later this year. If you want to use the same password for both SMP and Connections portal then you can set these to be the same when you reset your SMP password.

EAC Upcoming Timetable



Review Questions and seek clarification

Questions

Feedback

3 Feedback on Onboarding checklist requirements

Opportunity to provide requirements and order of priorities

5 min

Context

The Single Markets Platform project commenced in April 2021 and as part of a strategic review we conducted detailed user research with representatives of segments of the industry that would be users of the SMP.

Four themes came out of the User research:

1. Manage my portfolio... of assets
2. Trade and deliver... to generate return on investment
3. Get paid... on time and correctly the first time to generate cash flow
4. Operational communications... in a timely and effective manner

This analysis helped shape the initial scope of SMP as well as inform what functionality we prioritise for our foundational release in February 2022.

Key feedback received in 2021 was:

- "JOINING MARKETS TOOK A LONG TIME, WE DID NOT KNOW WHAT TO DO... THERE IS STILL THIS OLD, FILL IN THE FORM AND SEND IT IN PROCESS FOR THE SUPPLIER..."
- "I NEED A "TO-DO-LIST" OR A "FLIGHT PLAN" THAT CLEARLY SHOWS WHAT NEEDS TO BE DONE"
- "NO REPEATED INFORMATION SHOULD BE NEEDED FOR REGISTRATIONS, BIDS, TENDERS... YOU SHOULD NOT ASK FOR WHAT I HAVE ALREADY TOLD YOU!"
- "BEING READY TO JOIN A MARKET TOOK A LONG TIME... DID NOT KNOW WHAT TO DO NEXT... EVEN APPLIED USING THE WRONG FORM AND ONLY FOUND OUT MUCH LATER"
- "YOU MUST DEAL WITH MULTIPLE PARTIES, NOT JUST THE ESO, THERE NEEDS TO BE A FLOW CHART OF ALL THE PARTS OTHERWISE YOU HAVE NO CLUE WHAT'S NEXT"
- "THE IMPACTS OF DELAYS CAN BE BIG ENOUGH FOR SUPPLIERS TO GO UNDER"

We would like to get more detailed ideas on the information you would like to see on a Onboarding checklist.

Please share below your thoughts.

Must

Should

Could

Review Questions and seek clarification

Questions

Feedback

4 Walkthrough of Global Versioning customer journey UX Designs

Opportunity to share any improvements

30 min

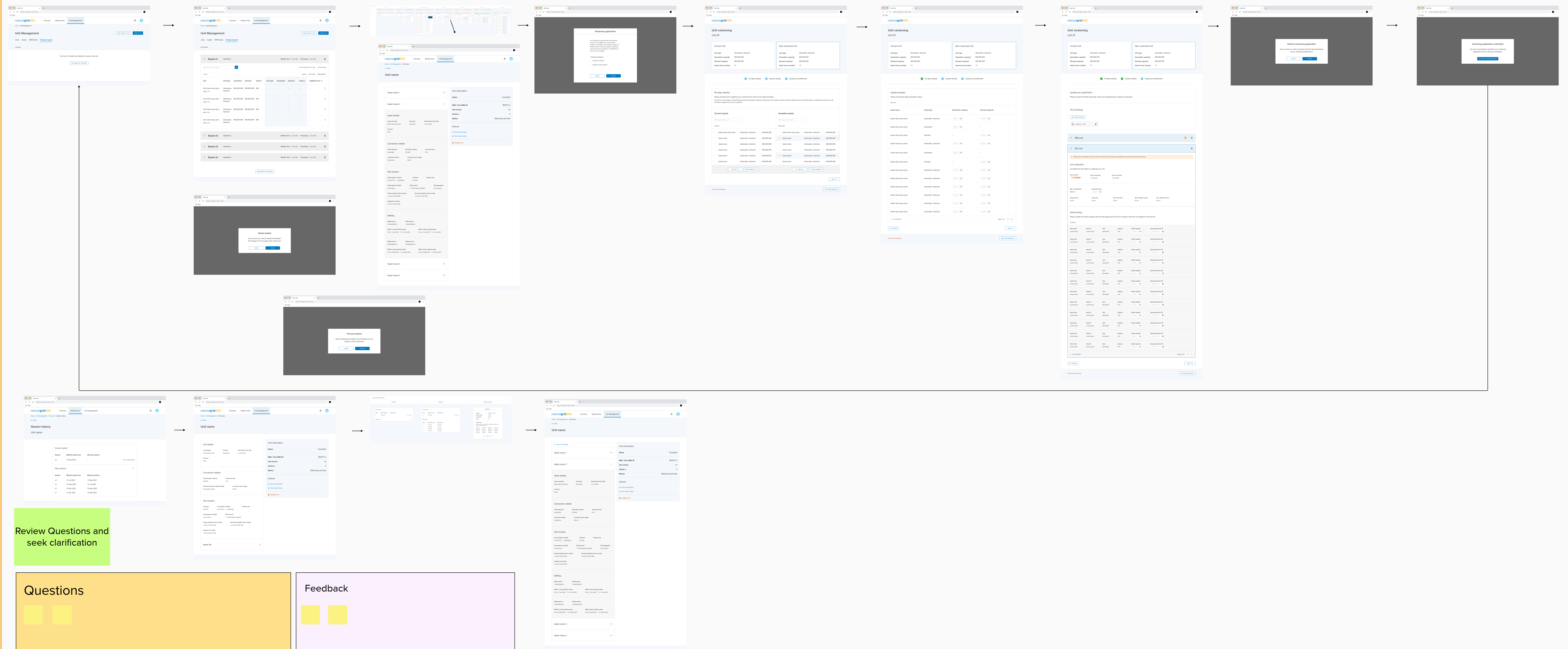
Context

Global Versioning allows the Single Markets Platform (SMP) to manage changes to Units and Assets in a controlled manner. A Unit Manager / Entity Manager can version a Unit or an Asset to improve track and document changes over it's lifecycle.

The Unit Manager / Entity Manager can monetarise Units and Assets to their full potential.

It is expected there will be approximately 100 Registered Service Providers that will undertake changes to an asset on a monthly basis. Any change to an asset requires approval from the internal teams due to the impact on Unit Services and Pre-Qualification. Through the application of business rules any changes to parameters of an asset can be automated therefore reducing manual approval.

UX Designs



Review Questions and seek clarification

Questions

Feedback

5 How to assign a "Trader role" in SMP

Steps to undertake

5 min

Pre-requisites

As of Release 2.8 (22nd September 2023) each organisation must have at least one active User and must have a Super User assigned for its SMP Portal Account. This will ensure that any prospective secondary or additional users wishing to take register and gain access to the same Account will be able to take advantage of the registration process in its entirety. Where a organisation has multiple users currently registered, a single user should be nominated for the Super User Role to manage the existing users.

Please note that the Super User Role has now been combined with the previous **User Admin Role**. The Super User will be able to fulfil both tasks of authorising registration requests and managing the suite of User Roles.

The Super User role is exclusively assigned and managed by the Contracts Managements Team in line with Business Rules.

User Guides and Training videos are available on the SMP website - https://www.nationalgrideso.com/industry-information/balancing-services/single-markets-platform#Market-information

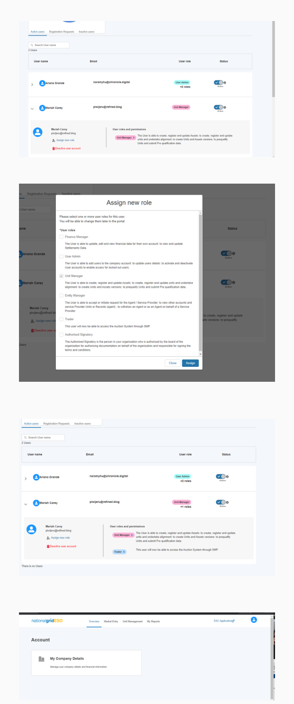
Onboarding Users to the Enduring Auction Capability (EAC) platform

In order for any SMP Portal (Active) Users to gain access to the EAC Platform it is mandatory they are assigned the **Trader Role by their respective Super User.**

To do this, the Super User will assume the usual steps for assigning new roles to Active Users the only exception being they ensure they add and then select the "Trader Role".

When the User is assigned the "Trader Role", it will appear under their "profile" under their respective listing on the Active Users Tab.

Upon next logging on the User will be able to view the EAC Application Tab on the top right-hand side of the SMP Portal Home Page/Screen. Upon clicking on this, they will automatically be re-directed to the EAC Platform without the need to login again.



Review Questions and seek clarification

Questions

Feedback

6 Feedback

Opportunity to provide instant feedback

2 min

Please post what we did well:

Please post what we could do better:

Actions