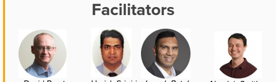
nationalgridESO

Single Markets Platform Show & Listen Session 32

Workshop date

21 03 24

Facilitators



David Preston - Product Manager | Harish Srigiri - Product Owner | Jayesh Patel - Business Analyst | Alasdair Smith - Functional Consultant

Agenda

1. Introduction — 2 min
2. Update on Releases — 5 min
3. API and Related Entity Demos — 10 min
4. Context Switching between Companies — 10 min
5. Improving Unit Registration with details of who gets paid — 7 min
6. Validation of Scenarios for Termination of a Related Entity Agreement — 7 min
7. 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

5 min

26th March - Release 2.14

1. Related Entity enhancements Phase 2 - enhanced functionality to allow multiple assets to be transferred to up to a number different agents and managed seamless to improve the customer experience. Additional statuses have been included to clearly identify what stage the Related Entity and Agent flow are in (Statuses are: Approved, Rejected, Submit for approval, Pending for agreement, Cancelled).
2. Update API - two new functionalities developed are: API user can now update properties of a Unit in Draft Status and update alignment of Assets to a Unit in Draft Status.
3. PoC with UKPN - this is not a production release but we can confirm that the PoC with UKPN and Electralink has been successfully completed and the learnings will be written up during Q1 24/25 and be shared with the industry to inform how such interactions could work in the future.

19th April - Release 2.15

1. Open Balancing Platform (OBP) Integration Day 1 - Contract data from SMP is identified and made available for the Open Balancing Platform that is required for the Quick Reserve Service launching later this year.
2. Contract Management Dashboard - this allows the Unit Manager to view contract awarded.
3. General Enhancements - User Improvements for Related Entity and allow companies from USA to register as a Registered Service Provider.

Review Questions and seek clarification

Questions

Feedback

3 API and Related Entity Demos

Feedback on new functionality

10 min

Review Questions and seek clarification

Questions

Feedback

4 Context Switching between Companies

Discussion on our thinking to a problem

10 min

Problem Statement

Scenario

Claire Smith works as the Unit Manager for Kent Limited who are registered on SMP.

Kent Limited is part of a group of companies which include Maidstone Limited, Ashford Limited, Canterbury Limited, Dover Limited and Dartford Limited.

Maidstone Limited, Ashford Limited, Canterbury Limited, Dover Limited and Dartford Limited are all registered on SMP.

Claire Smith also as the Unit Manager works for Maidstone Limited, Ashford Limited, Canterbury Limited, Dover Limited and Dartford Limited as the Unit Manager but has different username (email address) for each company.

Assumptions:
- Each company's Authorised Signatory has provided clearance on SMP for Claire to register the company and be the Unit Manager.

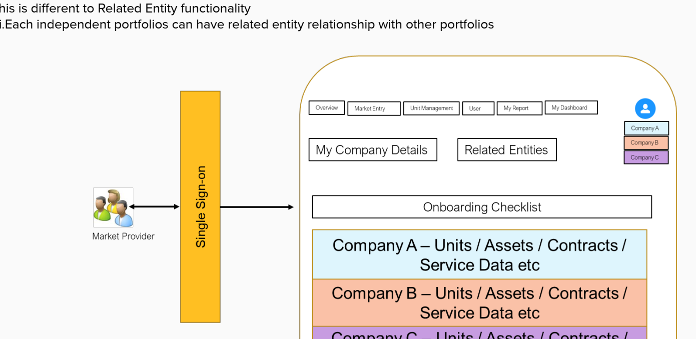
Challenges:
- Whenever Claire wants to perform any activity for one of the companies, she has to use a separate login for SMP which is time consuming going through the Single Sign-On authentication process.
- With Single Sign-On she can only have one email address going forward as the username.
- Can each user profile has the same access across across different companies?

Exercise to validate what is allowed for different user profiles

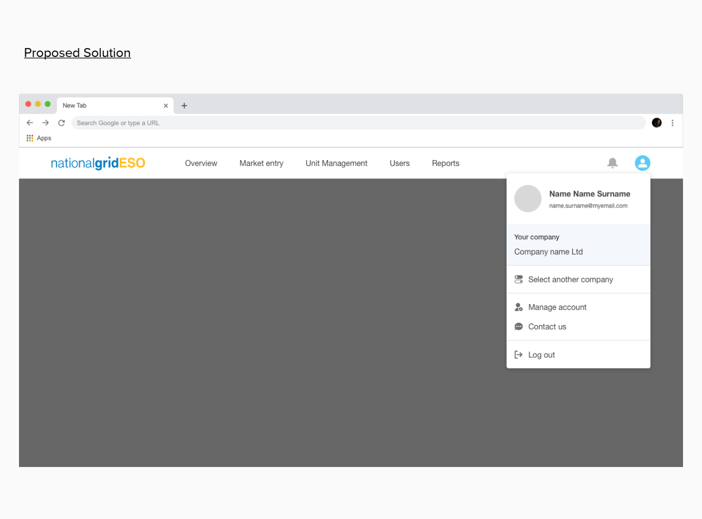
User / Company	Kent Limited	Maidstone Limited	Ashford Limited	Canterbury Limited	Dover Limited	Dartford Limited
Claire Smith	Unit Manager ✔ ⊗	Unit Manager ✔ ⊗	Unit Manager ✔ ⊗	Unit Manager ✔ ⊗	Unit Manager ✔ ⊗	Unit Manager ✔ ⊗
Joe Bloggs	Financial Manager ✔	Financial Manager ✔	Financial Manager ✔	Financial Manager ✔	Financial Manager ✔	Financial Manager ✔
Edward Jones	User Admin ✔ ⊗	User Admin ✔ ⊗	User Admin ✔ ⊗	User Admin ✔ ⊗	User Admin ✔ ⊗	User Admin ✔ ⊗
Sophia Menano * - *Assumption cannot have access across different companies due to licence compliance*	Trader ✔	Trader ⊗	Trader ⊗	Trader ⊗	Trader ⊗	Trader ⊗

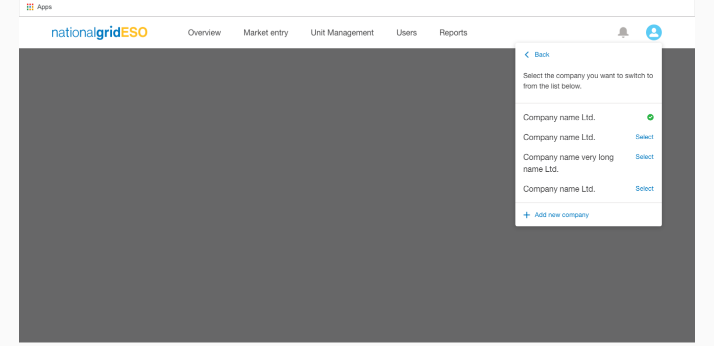
What is context switching and its purpose?

1. Context Switching is a functionality that will enable the Market Providers to access independent portfolios through a single sign on to manage that portfolio
2. These portfolios are independent to each other
3. Could probably also be settled separately
4. This is different to Related Entity functionality
   i. Each independent portfolios can have related entity relationship with other portfolios



Proposed Solution





Review Questions and seek clarification

Questions

Feedback

5 Improving Unit Registration with details of who gets paid

Changes to Unit Registration

7 min

Problem Statement

Scenario

Joe Bloggs works as the Financial Manager for Kent Limited who are registered on SMP.

Kent Limited is part of a group of companies which include Maidstone Limited, Ashford Limited, Canterbury Limited, Dover Limited and Dartford Limited.

Maidstone Limited, Ashford Limited, Canterbury Limited, Dover Limited and Dartford Limited are all registered on SMP.

Kent Limited is acting as an Agent on behalf of Maidstone Limited, Ashford Limited, Canterbury Limited, Dover Limited and Dartford Limited.

Joe wants to register 6 different Units on SMP and each one will the payee will vary.

Unit Name	Payee
Abbey	Kent Limited
Becket	Maidstone Limited
Edgar	Ashford Limited
Hackington	Canterbury Limited
Knotts	Dover Limited
Northgate	Dartford Limited

Open Questions:
1. Are all these combinations in the table above valid?
2. Can who gets paid for a Unit change over a time period?
3. Has anyone used the Registered Financial Details screens to register their bank details?
4. How do you currently provide details of who should be paid for a Unit?

Requirements on providing payee details for Units (to be captured during session) are:

Possible Solution for identifying who gets paid for a Unit would be to extend the Unit Registration Screen to capture the Company and associate this with the Unit (UX Design can be produced at a later date).

Review Questions and seek clarification

Questions

Feedback

6 Validation of Scenarios for Termination of a Related Entity Agreement

Feedback required

7 min

Context

Before we develop functionality for terminating a Related Entity Agreement we want to validate which scenarios below are relevant and also understand ones that have been missed.

Scenarios

A - Termination early by the Related Entity

- The Related Entity has a 2 year agreement with Agent B.
- 6 months into the agreement, the Related Entity wishes to terminate the agreement early.
- Which user profile from the Related Entity can terminate the agreement early?
- Is there any notice period that the Related Entity gives to the Agent informing them the agreement is ending earlier than planned?
- Is there any pre-determined notification a Related Entity would send to an Agent when terminating an agreement?

B - Extension of a Contract

- 3 months before the end of the existing Related Entity Agreement, the Related Entity wishes to extend the agreement by 12 months.
- Which user profile from the Related Entity should be allow to extend the agreement?
- Does the Agent to need to accept the extension or should the system automatically extend the agreement with any Agent action?

C - Company A has been bought by Company B, Company A has a Related Entity Agreement with Agent X

- Company A has a 2 year agreement with Agent X.
- 12 months into the agreement, Company A has been bought by Company B.
- Does the Related Entity automatically transfer over to Company B?
- Or does the Related Entity agreement end early and notifications are sent to the Agent X?
- What if Company B does not want to have an agreement with Agent X?

What are the other scenarios to add?

Review Questions and seek clarification

Questions

Feedback

7 Feedback

Opportunity to provide instant feedback

2 min

Please post what we did well:

Please post what we could do better:

Actions