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Business readiness support session

Agenda

1 Purpose of today

2 Change Lead resources

3 Future DA workflows

4 Planned DA system integration

5 Q&A

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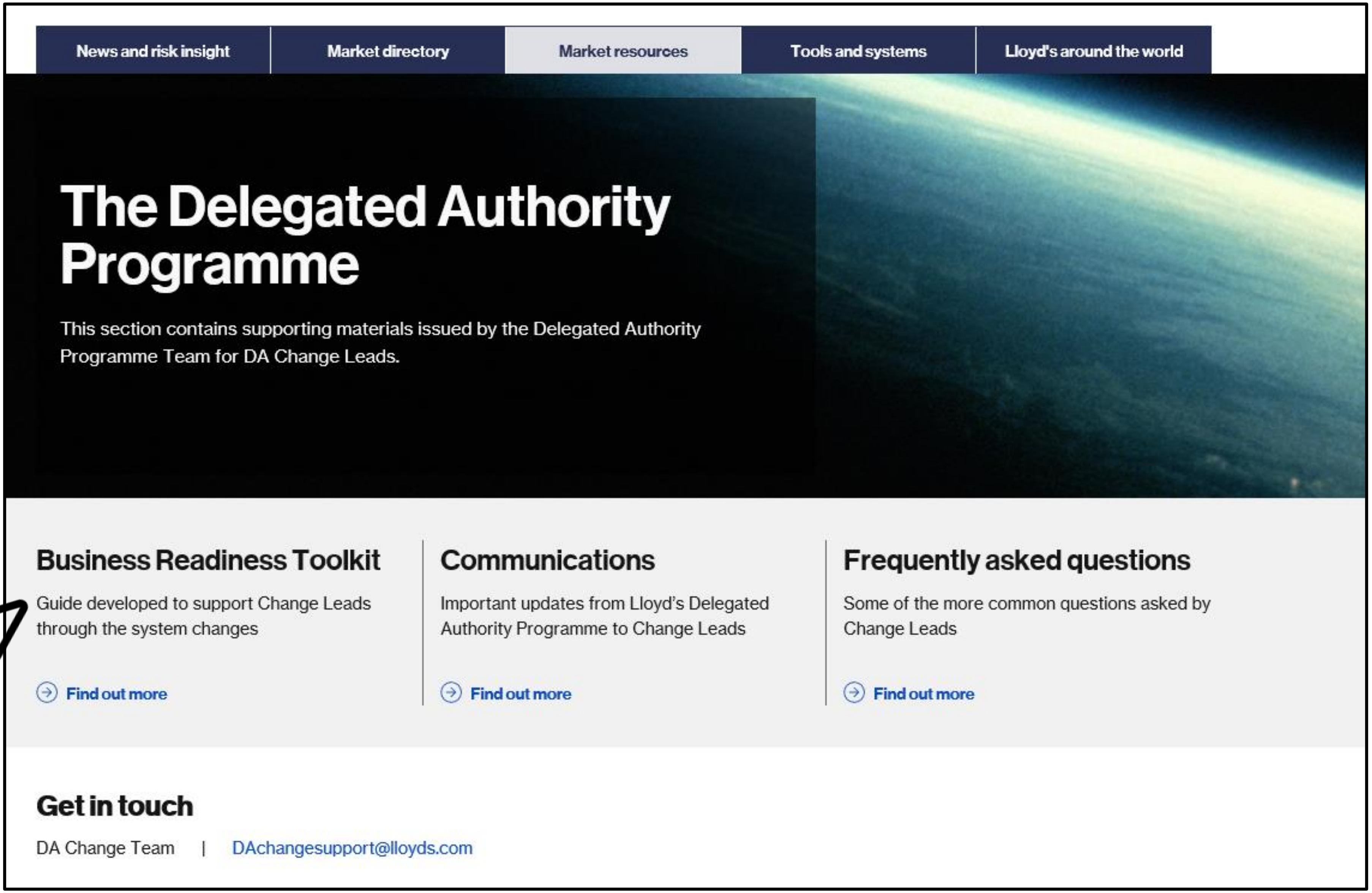
The purpose of today

- To provide further clarity on the future DA workflows
- To share integration plans for Delegated Contract and Oversight Manager
- To allow you the opportunity to ask business readiness questions

Change Lead resources

www.lloyds.com/dachangeleads



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Future DA workflows

- **Early Sight** - To support early planning and resource allocation, we are sharing future workflows iteratively, as soon as the information is available.
- **End-to-End Workflow** - Documented journeys of Contract Manager (and Contract Builder), from creating a contract to registering the binder
- **Release 1** - Workflows have been split out by Releases to highlight changes from Release 1 to further Releases

Contract Builder

Create Contract → Submit for Review → Validations are run → With contract reviewers to approve/return → Contract is registered and API updates sent to other market systems → Contract is active from inception date

Contract Manager

Create Contract → Submit for Review → Validations are run → With contract reviewers to approve/return → Contract reviewers stamp and sign → Contract is registered and API updates sent to other market systems → Contract is active from inception date

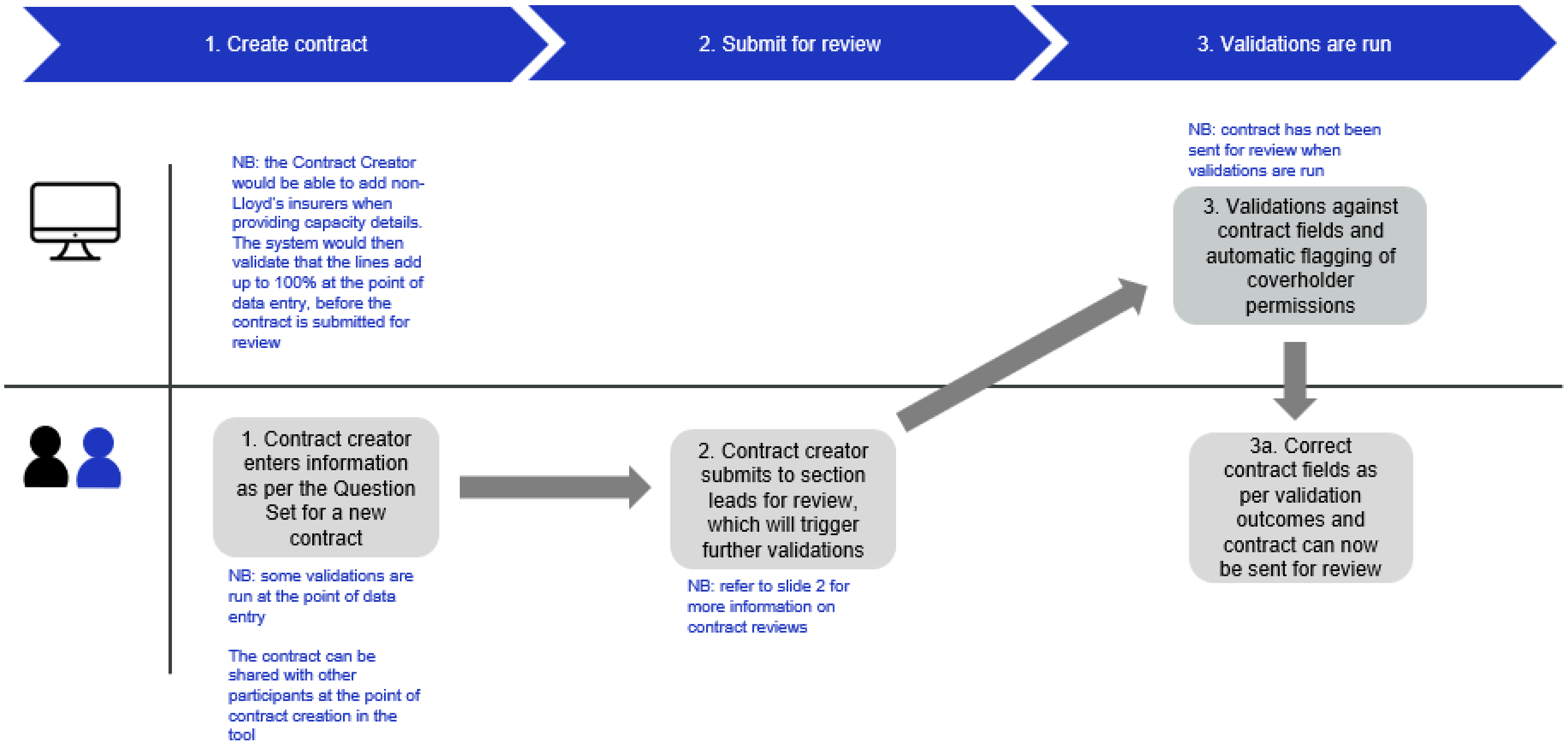
Release 1

Delegated Contract Manager:
Contract Builder Workflows

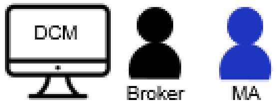
DCM Broker MA

Release 1 - Create binder and submit for review

Contract Builder

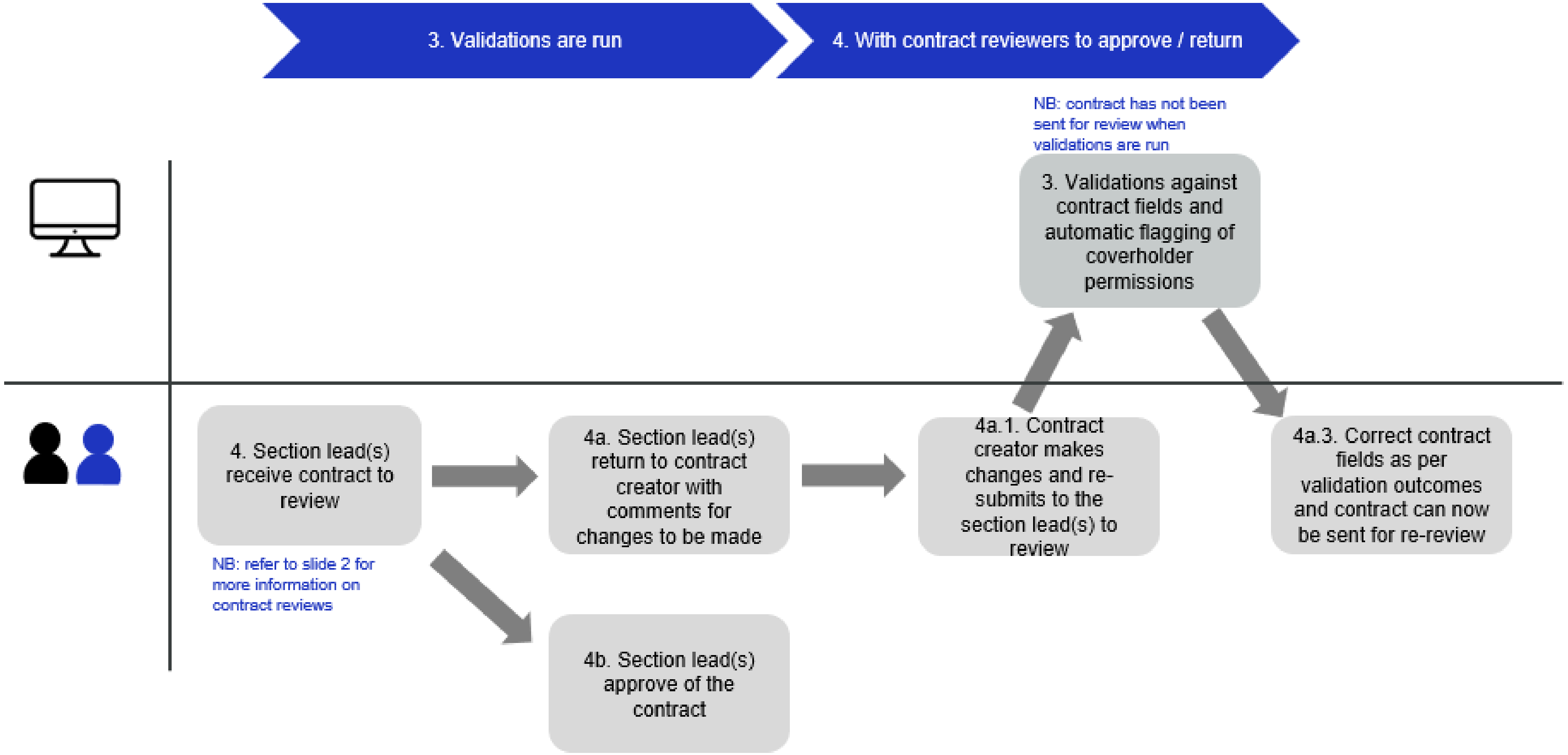


The same workflow would be followed for creating endorsements on a registered binder for Release 1
Hybrid Coverholder roles will allow them to act as the contract creator in Release 1

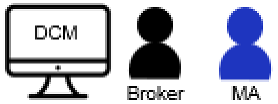


Release 1 – Review and update binder

Contract Builder

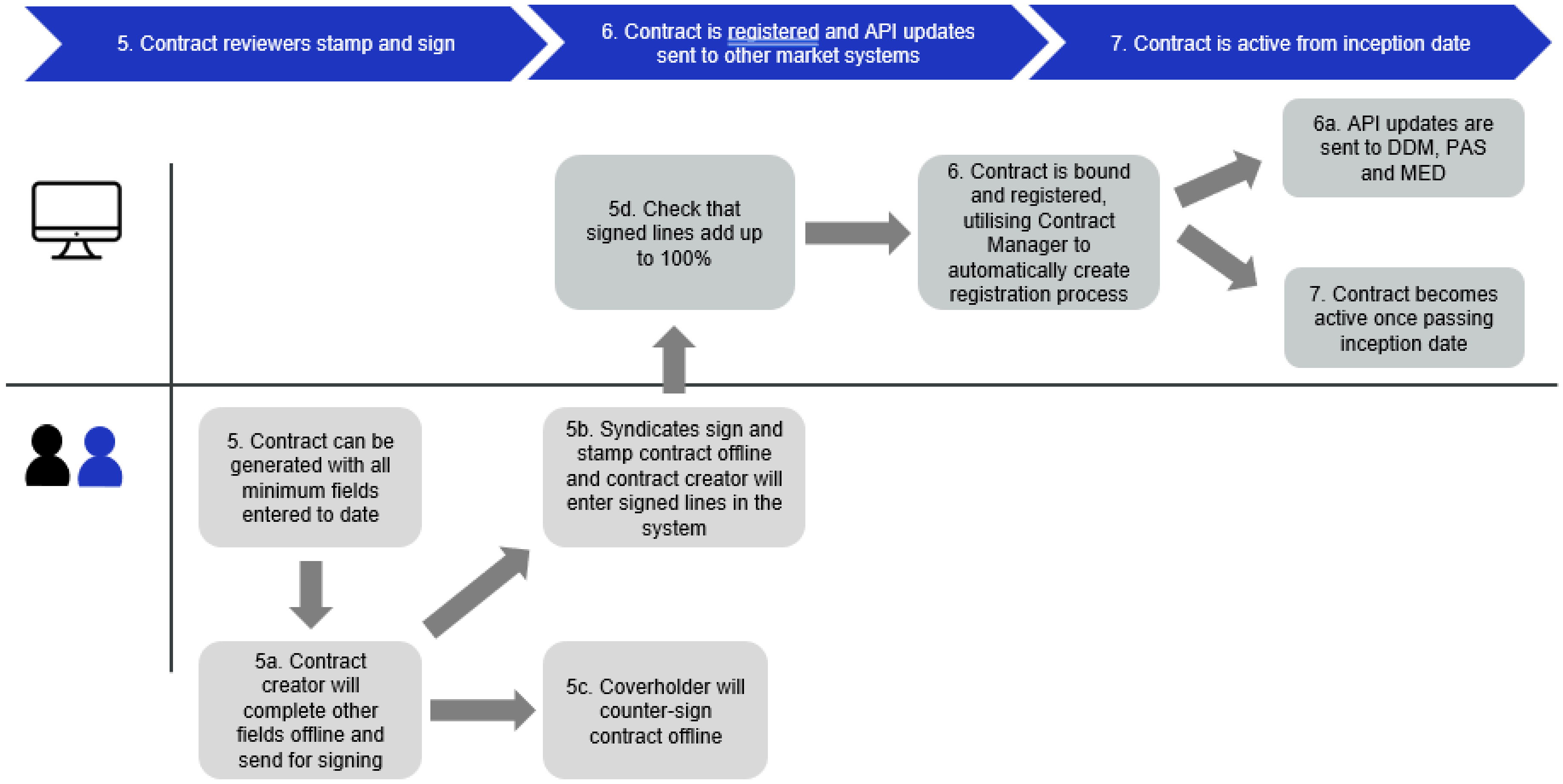


The same workflow would be followed for reviewing endorsements for Release 1



Release 1 – Approve, sign, stamp and register binder

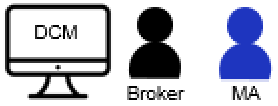
Contract Builder



The same workflow would be followed for registering endorsements on a registered binder for Release 1

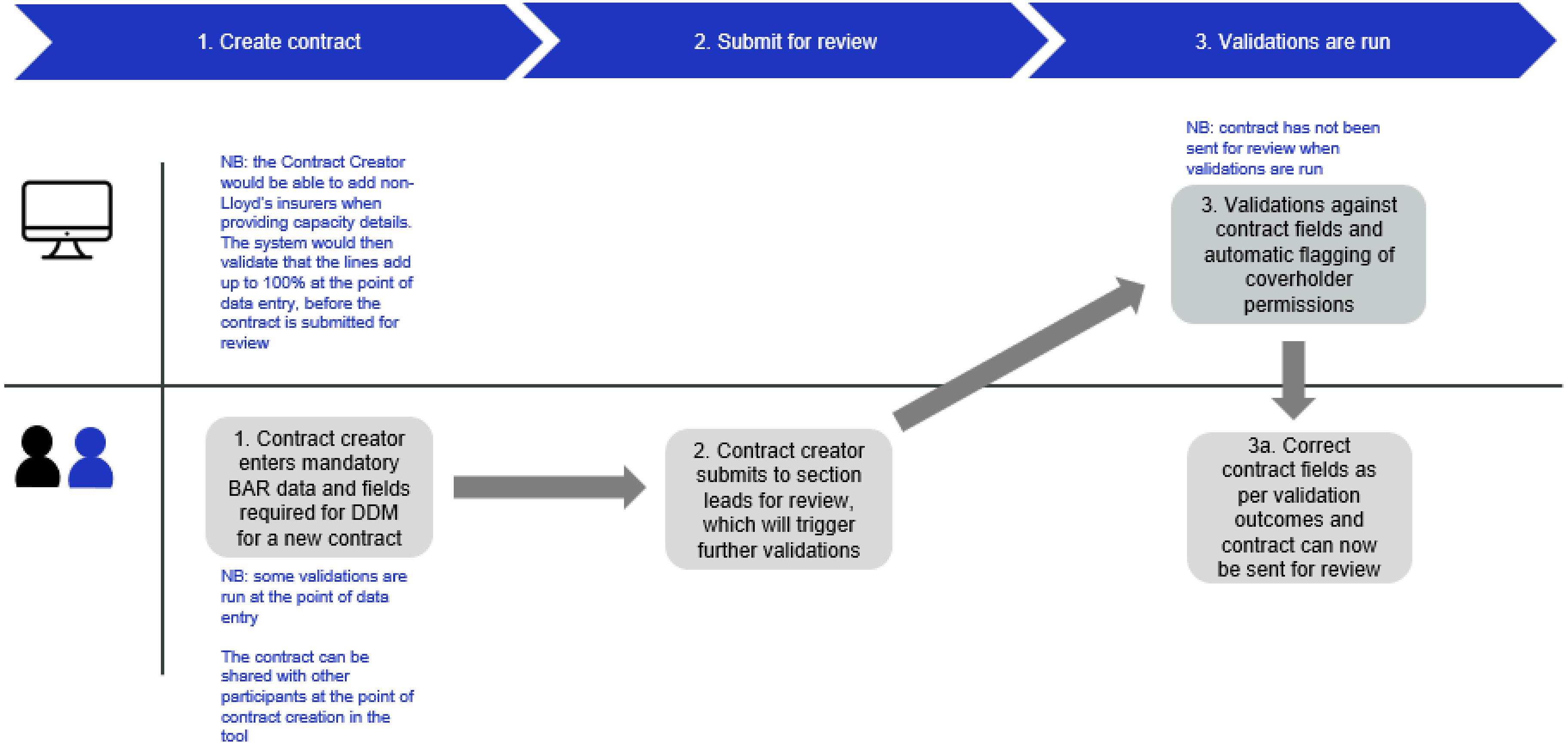
Release 1

Delegated Contract Manager:
Contract Manager - Registration Workflows



Release 1 - Create binder and submit for review

Contract Manager - Registration



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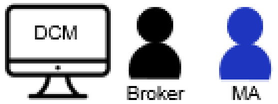
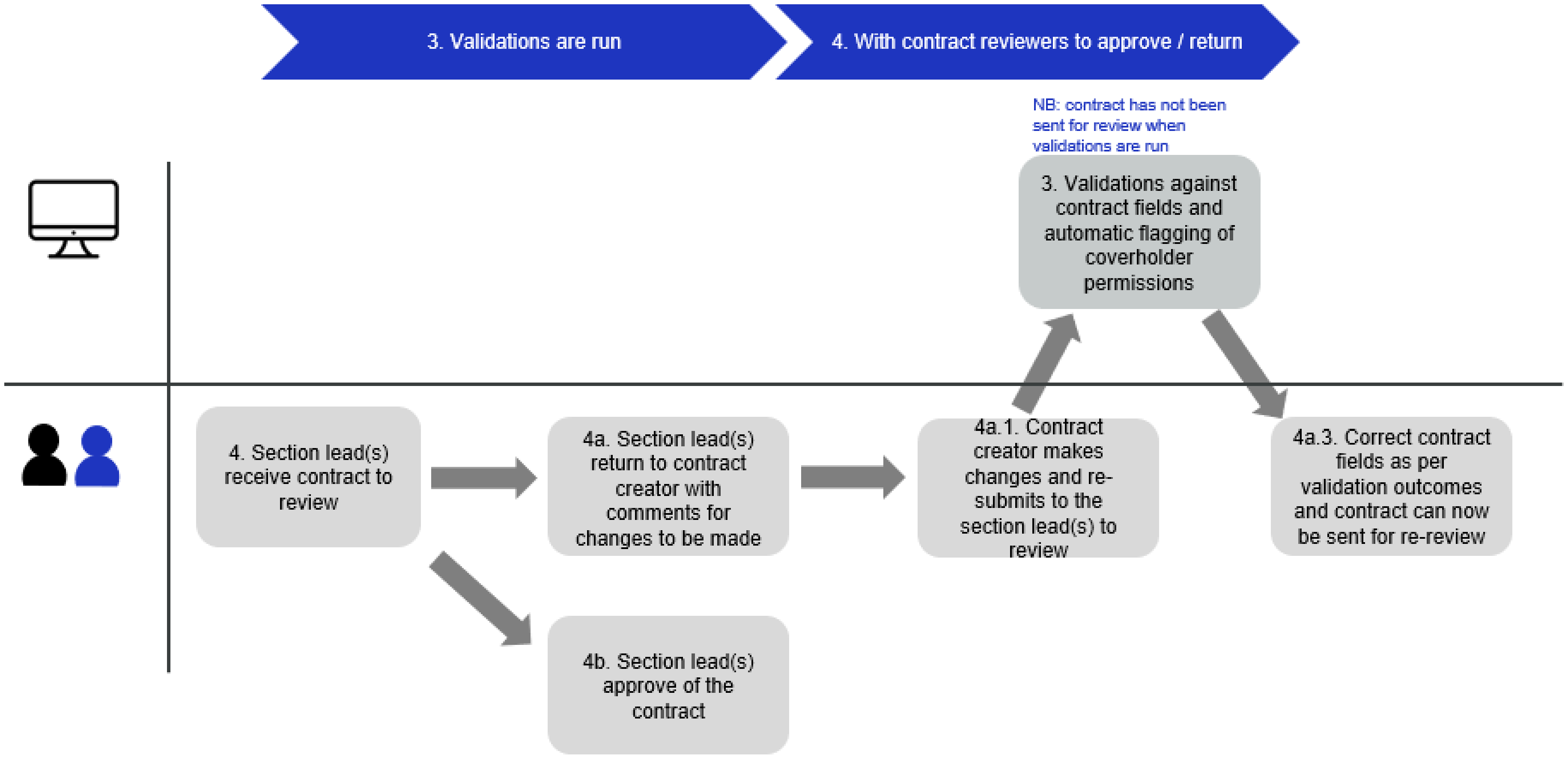


Release 1 – Review and update binder

Contract Manager - Registration



The same workflow would be followed for reviewing endorsements for Release 1

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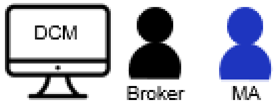
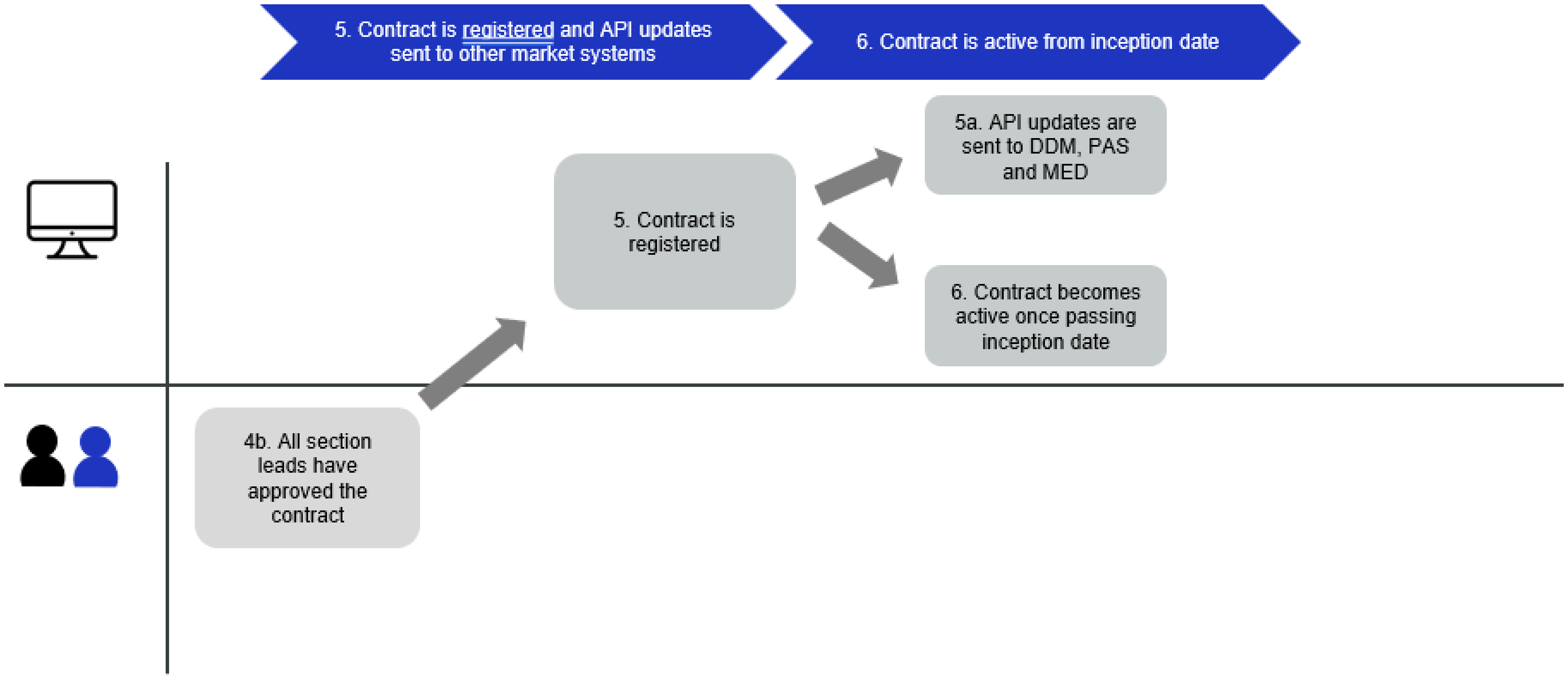


Release 1 – Register binder

Contract Manager - Registration



The same workflow would be followed for registering endorsements on a registered binder for Release 1

Release 2 / Future Releases

Delegated Contract Manager:
Contract Builder Workflows

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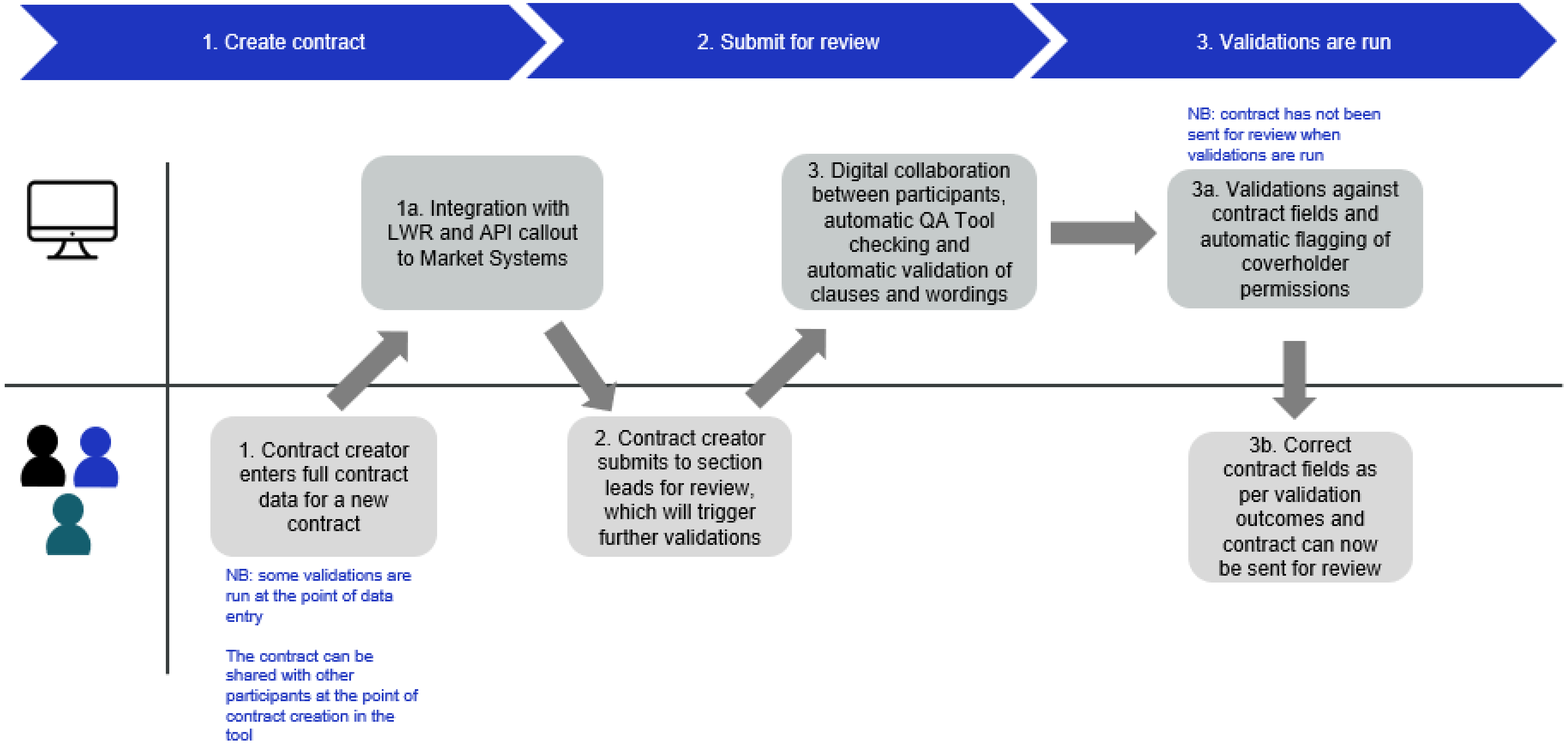
DCM Broker MA Coverholder

Release 2 / Future Releases - Create binder and submit for review

Contract Builder



The same workflow would be followed for creating endorsements on a registered binder for Release 2

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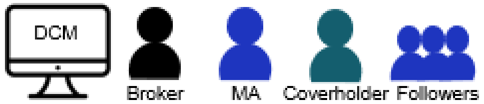
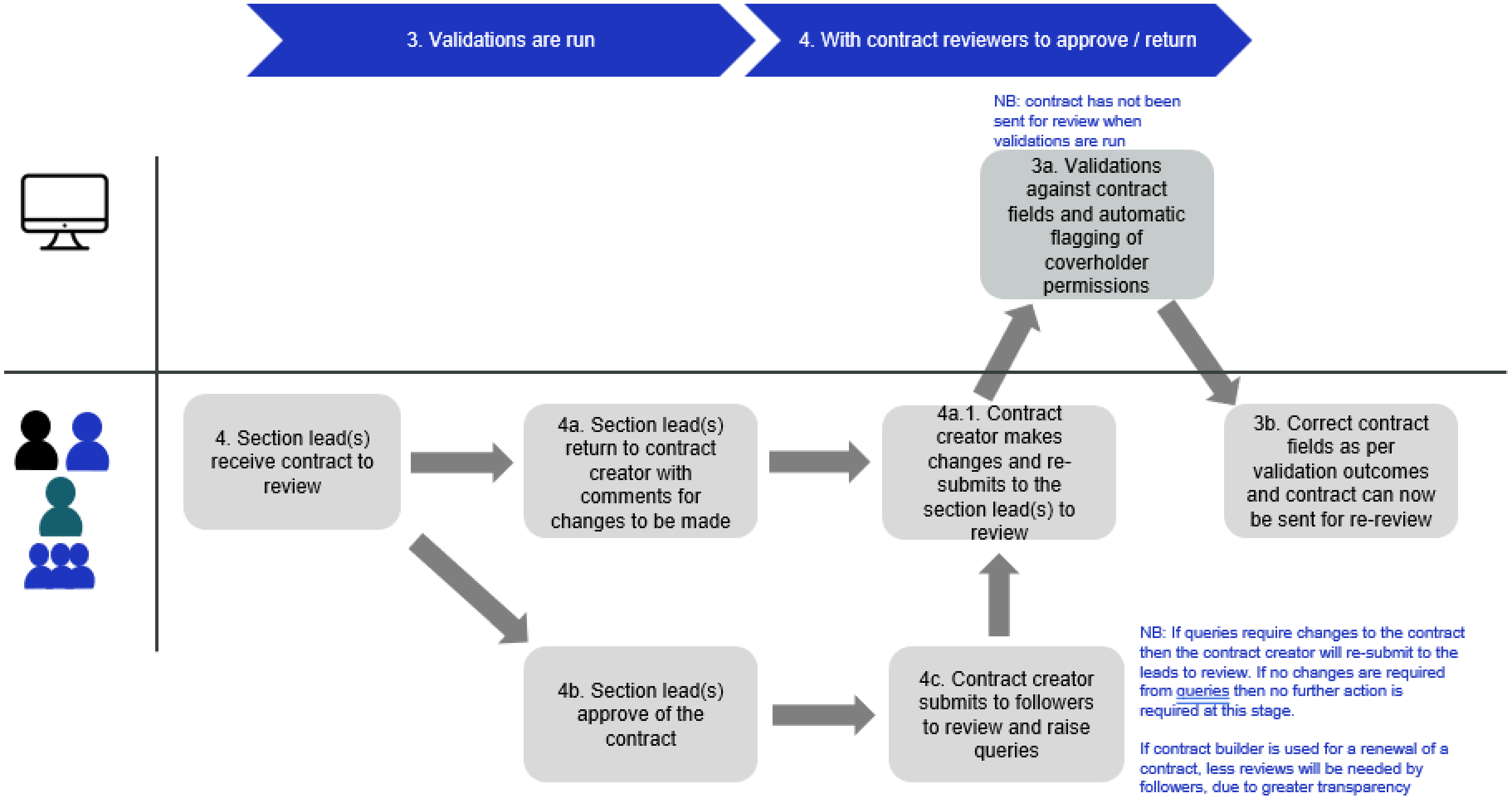


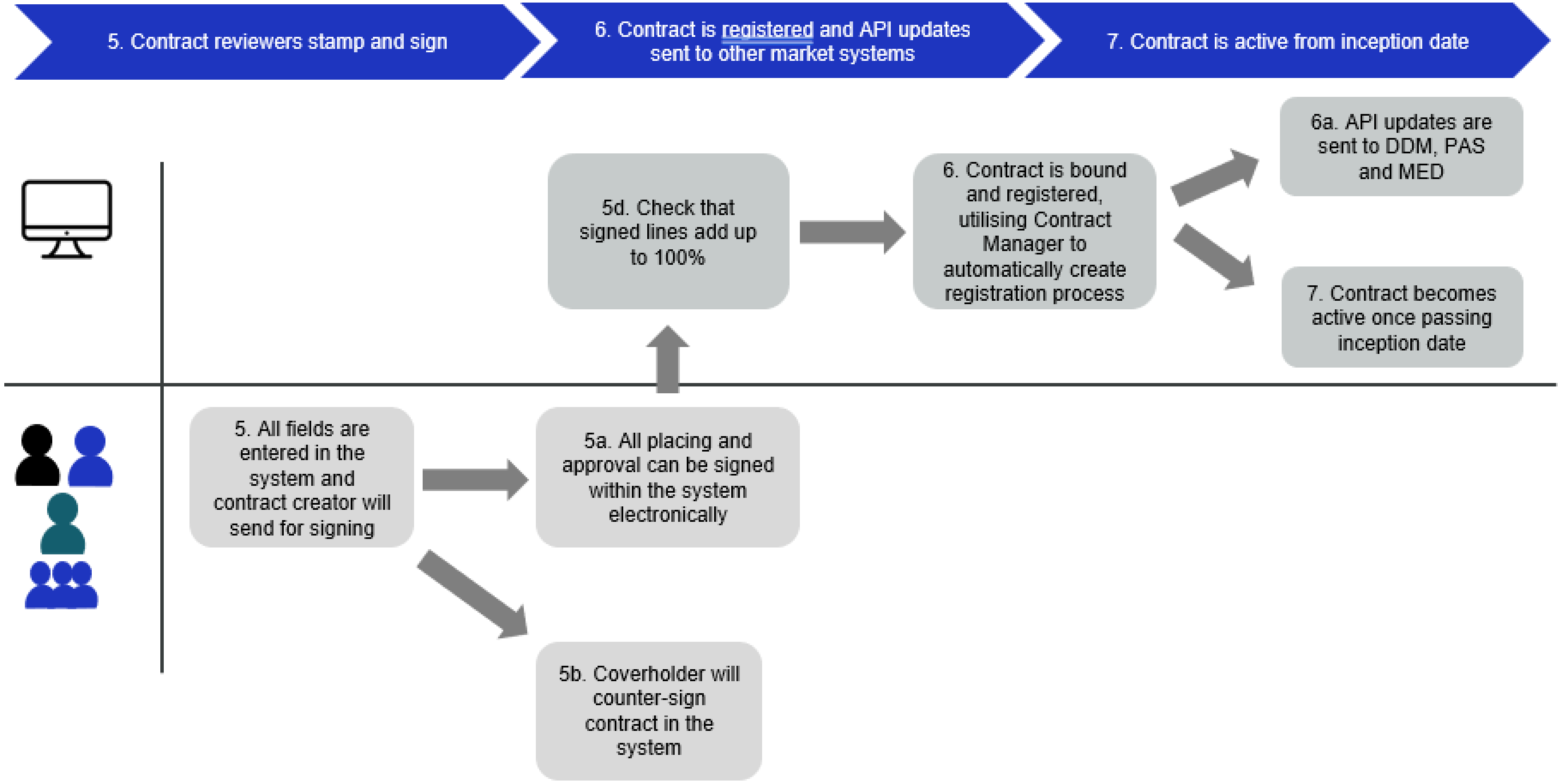
Release 2 / Future Releases – Review and update binder

Contract Builder



Release 2 / Future Releases – Approve, sign, stamp and register binder

Contract Builder



The same workflow would be followed for registering endorsements on a registered binder for Release 2

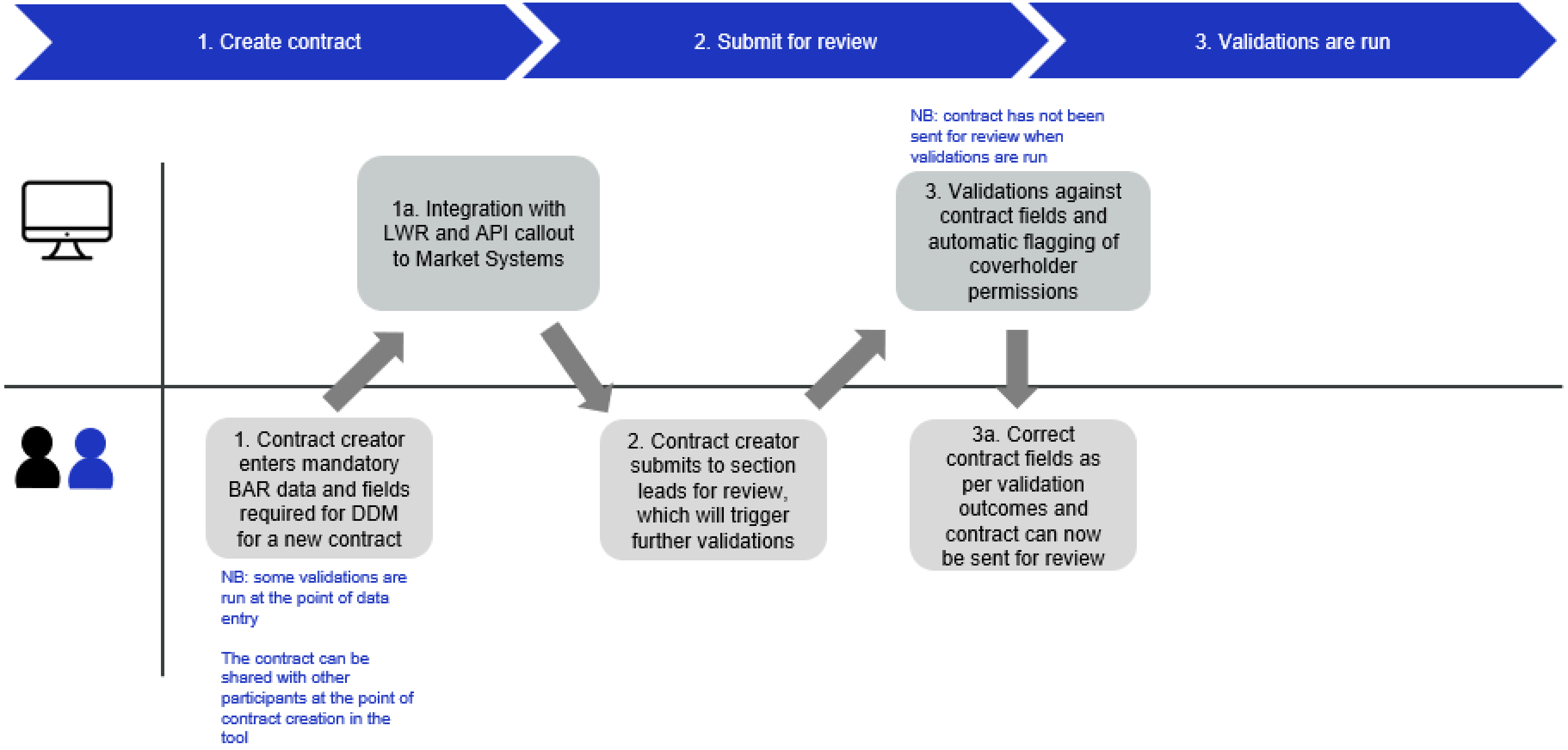
Release 2 / Future Releases

Delegated Contract Manager:
Contract Manager - Registration Workflows

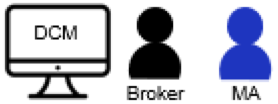
DCM Broker MA

Release 2 / Future Releases - Create binder and submit for review

Contract Manager - Registration

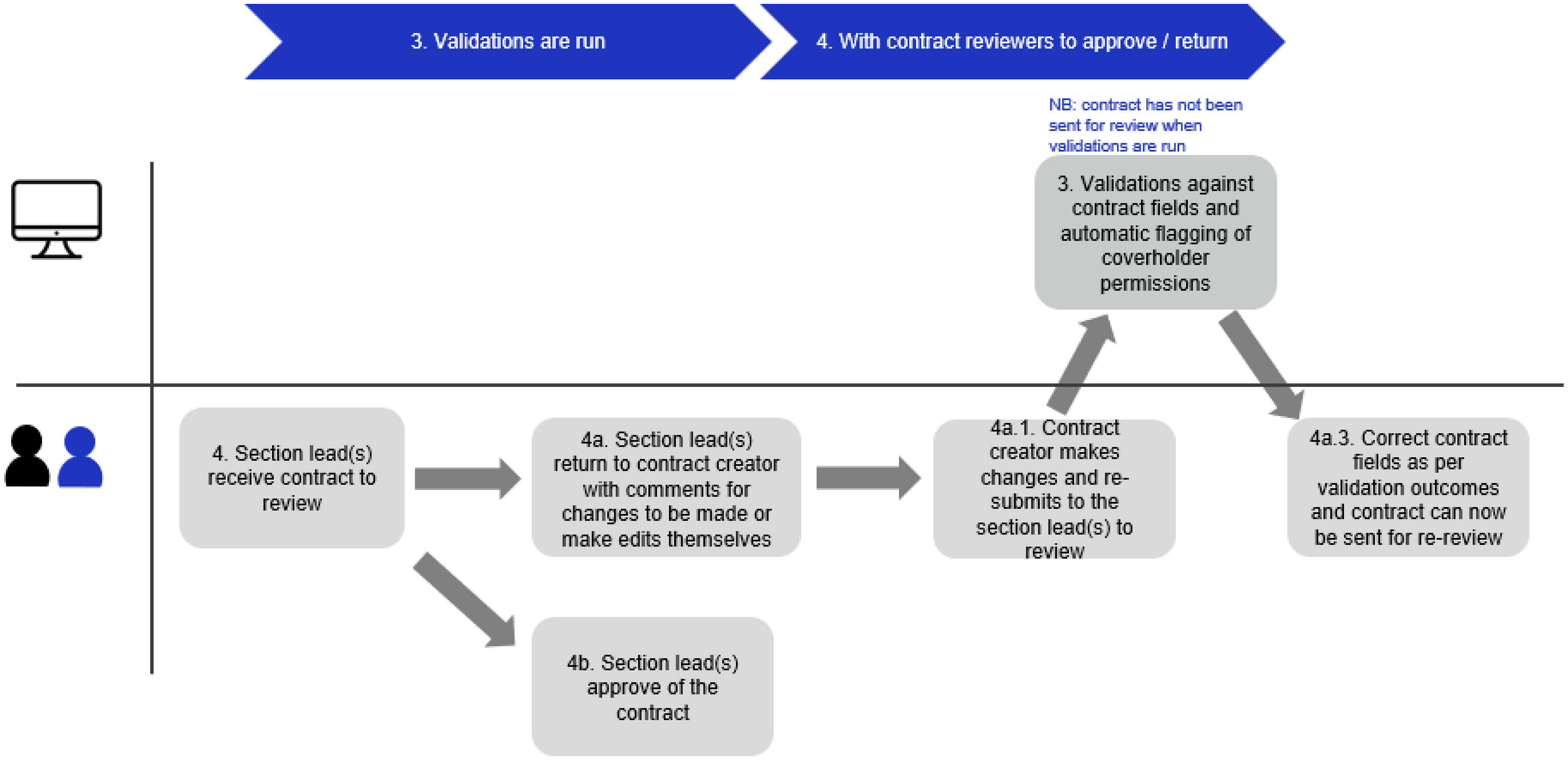


The same workflow would be followed for creating endorsements on a registered binder for Release 2

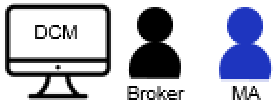


Release 2 / Future Releases – Review and update binder

Contract Manager - Registration

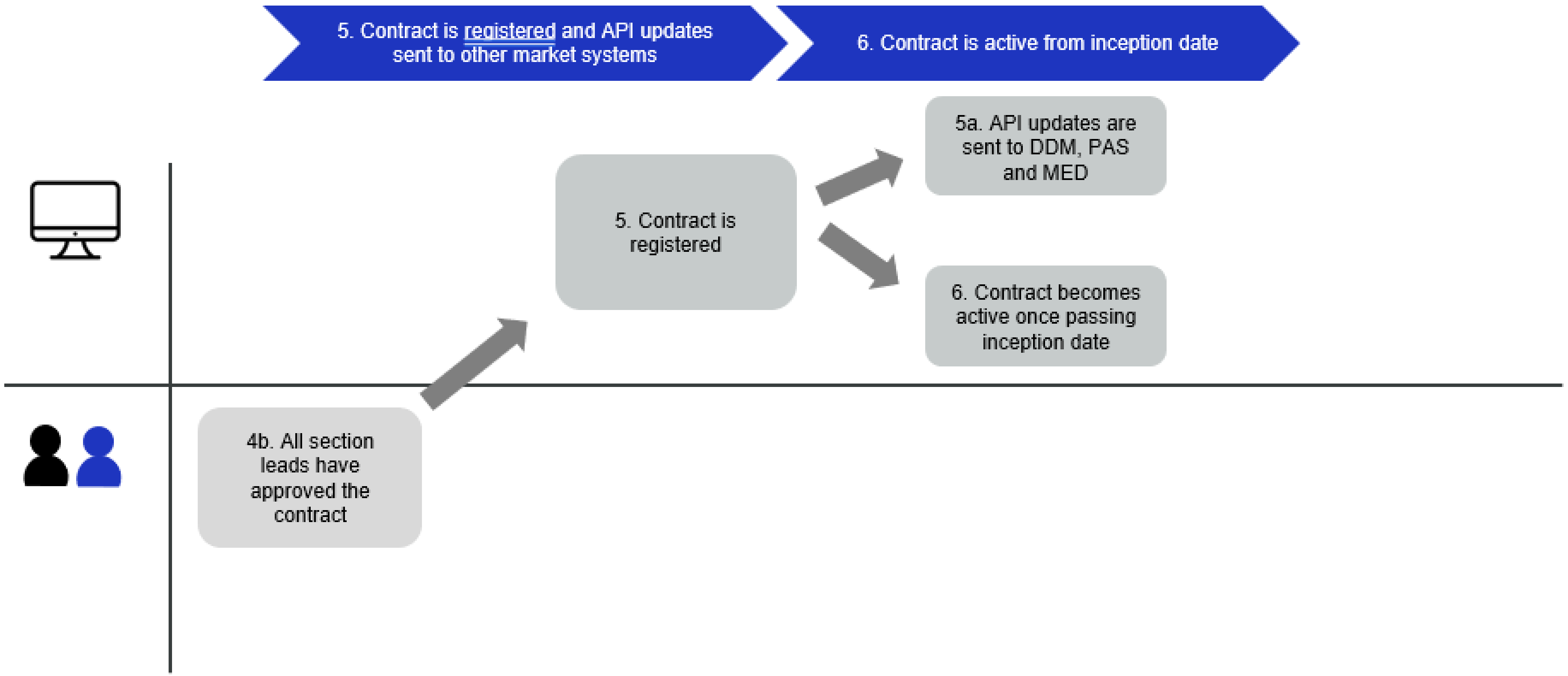


The same workflow would be followed for reviewing endorsements for Release 2



Release 2 / Future Releases – Register binder

Contract Manager - Registration



The same workflow would be followed for registering endorsements on a registered binder for Release 2

Release 2 / Future Releases

Delegated Contract Manager:
Endorse Workflow

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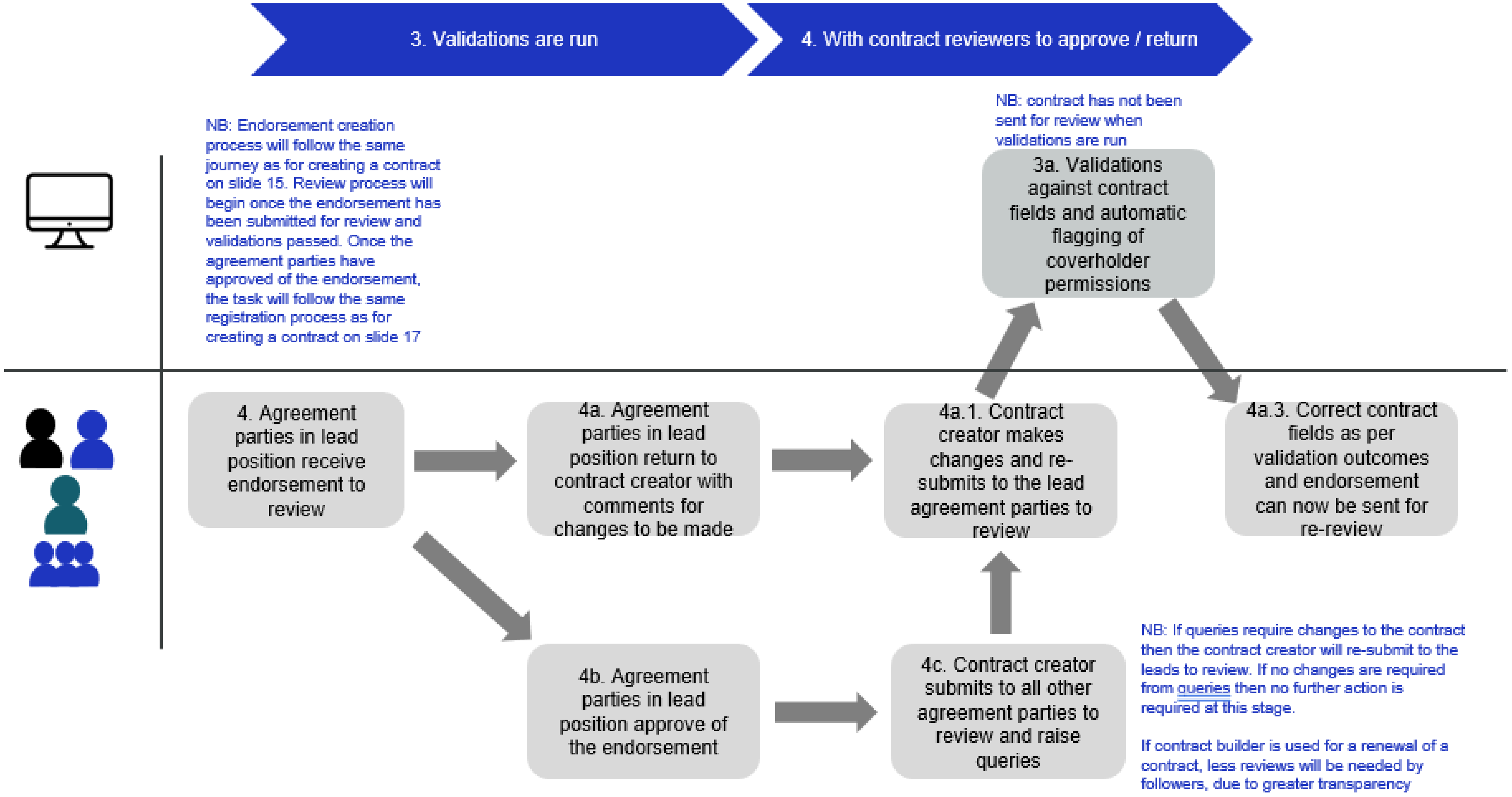
Release 2 / Future Releases – Review and update endorsement

Contract Builder



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Integration Scope - DCOM

Release 2

Delegated Contract Manager	Delegated Oversight Manager
• **Outbound** from DCOM for consumption of contract data for updating market firm systems. • **Inbound -** from market systems for contract registration. Publish contract updates to Delegated Contract Manager for contracts managed in market firm's own systems	• **Outbound** API from DCOM for consumption of coverholder & DCA data. Retrieve latest market entity data for updating market firm systems (API–based read–only access to all fields available in Delegated Oversight Manager)

Integration Scope – Delegated Contract Manager & Delegated Data Manager

Release 1

Delegated Contract Manager

Delegated Data Manager

- **Contract Data** - This integration will enable the transmission of contract data between Delegated Contract Manager and Delegated Data Manager to reduce the effort involved in setting up contracts within Delegated Data Manager.
- **Requirements Defining** – This has now been completed. Integration development has started, with focus on first supporting transfer of data for New Contracts.
- **Future Toolkits** - Further information will follow in future versions of the toolkit.

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API Development Process

Requirements Elaboration

- Based on API standards.
- Workshops to define how market organisations want to consume and send data

OUTPUT - define the API requirements.

Design Specification

- Specifications detailing the scope, functionality and technical standards

OUTPUT – API specifications provided to the market

API Build

- Iterative development of outbound and inbound APIs with support for market expertise

OUTPUT – Technical API solution

Testing

- API solution tested and validated to identify and resolve technical issues.

OUTPUT – APIs ready for integration testing with some market systems

Market Launch

- Live API
- Full specification
- Developer access process

Support the Project team in understanding data needs and support requirements elaboration	Review and provide feedback on the API specifications	Support solution development through market expertise and validate thinking .	Test API solution to report technical issue ahead of launch

API Design Programme – 17 Participants (Managing Agents & Brokers)