

Business Activity	When?	Comments	Ref docs
<b>Technical &amp; Security</b>			
<b>1</b>	IT Department to:	Now	To access next gen, <b>SSO is COMPULSORY</b> and is available to test now.
	1. configure <b>single sign on (SSO)</b> and 2. review the <b>PPL IT Consideration</b> document		Yes*
<b>2</b>	Review the <b>PPL Information Security</b> document	Now	Your compliance teams/CISO may want to review before your organisation starts using PPL next gen
			<b>Available on request*</b>
 <b>*Download reference documents:</b> IT Considerations: <a href="https://placingplatformlimited.com/ppl-next-gen-it-considerations/">https://placingplatformlimited.com/ppl-next-gen-it-considerations/</a> Single sign-on: <a href="https://placingplatformlimited.com/ppl-next-gen-ss0-v3-0/">https://placingplatformlimited.com/ppl-next-gen-ss0-v3-0/</a> Information Security: please request at <a href="mailto:pplenquiries@placingplatformlimited.com">pplenquiries@placingplatformlimited.com</a>			
<b>Organisation configuration</b>			
<b>3</b>	Validate <b>Organisation configuration</b> via the spreadsheet received from PPL	Now	Unless PPL are notified of any changes, they will be loaded as provided to you by PPL. You will have the opportunity to check your set-up again prior to going live.
 <b>*Download reference document:</b> Organisation configuration: <a href="https://placingplatformlimited.com/ppl-next-gen-broker-configuration/">https://placingplatformlimited.com/ppl-next-gen-broker-configuration/</a>			
<b>Existing placements and new risks</b>			
<b>4</b>	Decide <b>how you will handle existing and new risks</b> from commencement of cutover?	Now	4 options to choose from
	<b>Option 1</b> • Continue to work on current version for all existing risks and place all new business on next gen from 20 <sup>th</sup> February 2023.	From 20 <sup>th</sup> February 2023	
	<b>Option 2</b> • Using the <b>PPL Archive Placement Tool</b> , upload all risks that I <i>anticipate endorsement activity</i> on. Either on or before day 1 or gradually as an endorsement is required.	From January	All supporting documents and markets, per risk, will need to be added manually.
	<b>Option 3</b> • Using the <b>PPL Archive Placement Tool</b> , upload all live <b>Master facilities/line slips</b> placed on PPL V3 (current platform) into next gen.		<b>Remembering PPL is not your system of record)</b> Can all be uploaded prior to 20/2/23 – OR – as & when, throughout 2023 by inception date
	<b>Option 4</b> • Using the <b>PPL Bulk Upload Tool</b> , load all 2022 risks that will be renewed on next gen. (Can also bulk load any new business).	From January	Can all be uploaded prior to 20/2/23 – OR – as & when, throughout 2023 by inception date
 <b>*Download reference documents:</b> PPL Archive Placement Tool: <a href="https://placingplatformlimited.com/ppl-next-gen-archived-placements/">https://placingplatformlimited.com/ppl-next-gen-archived-placements/</a> PPL Bulk Upload Tool: <a href="https://placingplatformlimited.com/ppl-next-gen-bulk-upload-december-2022/">https://placingplatformlimited.com/ppl-next-gen-bulk-upload-december-2022/</a>			
<b>Management Information (MI)</b>			
<b>5</b>	Check internal MI process that is currently used for V3. Internal process revisions will/may need to be made.	From January	Both new and existing MI extracts will be available in next gen. Market test sessions planned for January 23
 <b>*Download reference document:</b> Broker MI Extracts: <a href="https://placingplatformlimited.com/ppl-next-gen-mi-extracts-broker-final/">https://placingplatformlimited.com/ppl-next-gen-mi-extracts-broker-final/</a>			
<b>Training</b>			
<b>6</b>	Train the trainer	From January	Pre-registered trainers commenced 29/11/22. Further availability from January 2023. Mix of classroom and virtual
<b>7</b>	User Training	From January	Mix of classroom, virtual and Learning Management System (LMS)
 <b>*Download reference document:</b> Training Approach: <a href="https://placingplatformlimited.com/ppl-next-gen-training-approach-2/">https://placingplatformlimited.com/ppl-next-gen-training-approach-2/</a>			
<b>PPL Market User Agreement (MUA)</b>			
<b>8</b>	Sign the updated MUA	From January	This will allow me to transact business on PPL next gen.
			Will be provided with the MUA