

EMR Delivery Body New Portal Customer Familiarisation Window (CFW) Summary



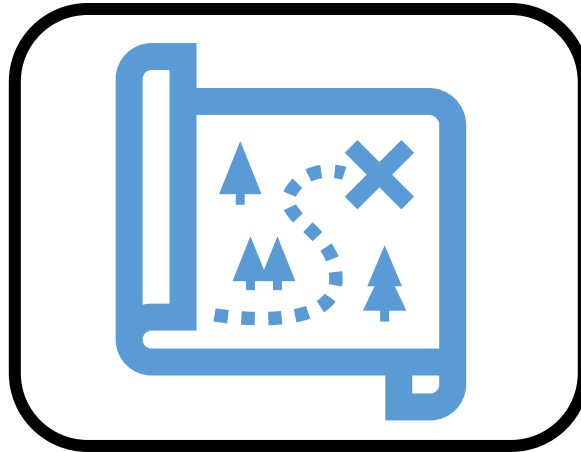
Purpose of Familiarisation Window

Confidence & Assurance



Provide assurance in the New Portal system to industry by demonstrating the improvement in comparison to the current Portal.

New Portal Navigation



Give customers the opportunity to navigate and familiarise themselves with the New Portal system in preparation for the full operational release.

Test Internal processes



Prepare the EMR Delivery Body (DB) and carry out a test run of the internal processes that will be required for go-live and operational use of the New Portal.

Provide Feedback



Collect feedback from industry on the New Portal system and integrated guidance to identify issues and areas for improvement.

Key Participation Stats

Users

- **67** user accounts, representing 31 organisations and 298 individual companies.
- Represented 1,306 active CM agreements, and **61%** of total active capacity.

Submissions

- In the PQ process: **92** applications were created, of which 73 were submitted and 51 were disputed.
- In the AM process, **39** Post Assessment Requests (PARs) were completed.

CFW Plan

March 2024									April 2024													
Day	CFW Week 1			CFW Week 2					Bank Holiday	Bank Holiday	CFW Week 2					CFW Week 4					CFW Week 5	
	We	Th	Fr	Mo	Tu	We	Th	Fr			Mo	Tu	We	Th	Fr	Mo	Tu	We	Th	Fr	Mo	Tu
	20	21	22	25	26	27	28	29			1	2	3	4	5	8	9	10	11	12	15	16
Cycle 1	CMU Creation & PQ Submission			CMU Creation & PQ Submission	PQ Assessment & Results	Disputes Submission	Disputes Assessment			Disputes Assessment & Results	Pre-Auction Activities Submission (1) Pre-Auction Activities Processing	Confirmation of Entry / Bidding Groups / Bidding Capacity	Auction Results (T-1 / T-4) & CANs	AM Activities								
Cycle 2	CMU Creation			CMU Creation & PQ Submission		PQ Assessment	PQ Results			Disputes Submission	Disputes Assessment	Disputes Assessment & Results	Pre-Auction Activities Submission (1) Pre-Auction Activities Processing	Confirmation of Entry / Bidding Groups / Bidding Capacity	Auction Results (T-1 / T-4) & CANs	AM Activities						
Cycle 3	CMU Creation									CMU Creation & PQ Submission			PQ Assessment	PQ Assessment & Results	Disputes Submission	Disputes Assessment & Results	Pre-Auction Activities Submission (1) Pre-Auction Activities Processing	Confirmation of Entry / Bidding Groups / Bidding Capacity	Auction Results (T-1 / T-4) & CANs	AM Activities		
Cycle 4	PQ Application Submission								PQ Application Submission													
Cycle 5	AM Activities / ST Familiarisation (For Users with Existing Agreements)								AM Activities / ST Familiarisation (For Users with Existing Agreements)													

The CFW was held over 5 calendar weeks, between the 20th March – 16th April 2024. These dates were chosen as it was the earliest period it could be offered, occurring after the internal end-to-end testing in February and before the full operational release of the system.

Cycles 1 – 3 allowed a full journey through the Capacity Market process.

Cycle 4 allowed the unlimited creation and submission of PQ applications.

Cycle 5 allowed users with migrated existing agreements to familiarise themselves with agreement management activities and PARs.

CFW Comms & Customer Engagement

Meetings With Interested Customers

- 43 calls held with registered participants to walk customers through the detailed CFW plans and gain clarity on participation expectations.

CFW Webinar

- Webinar held on 14th March 2024, with 29 customers attending.
- Provided key information, with an opportunity for customers to ask questions.
- CFW Information pack sent to CFW participants containing information to help understand the CFW activities.

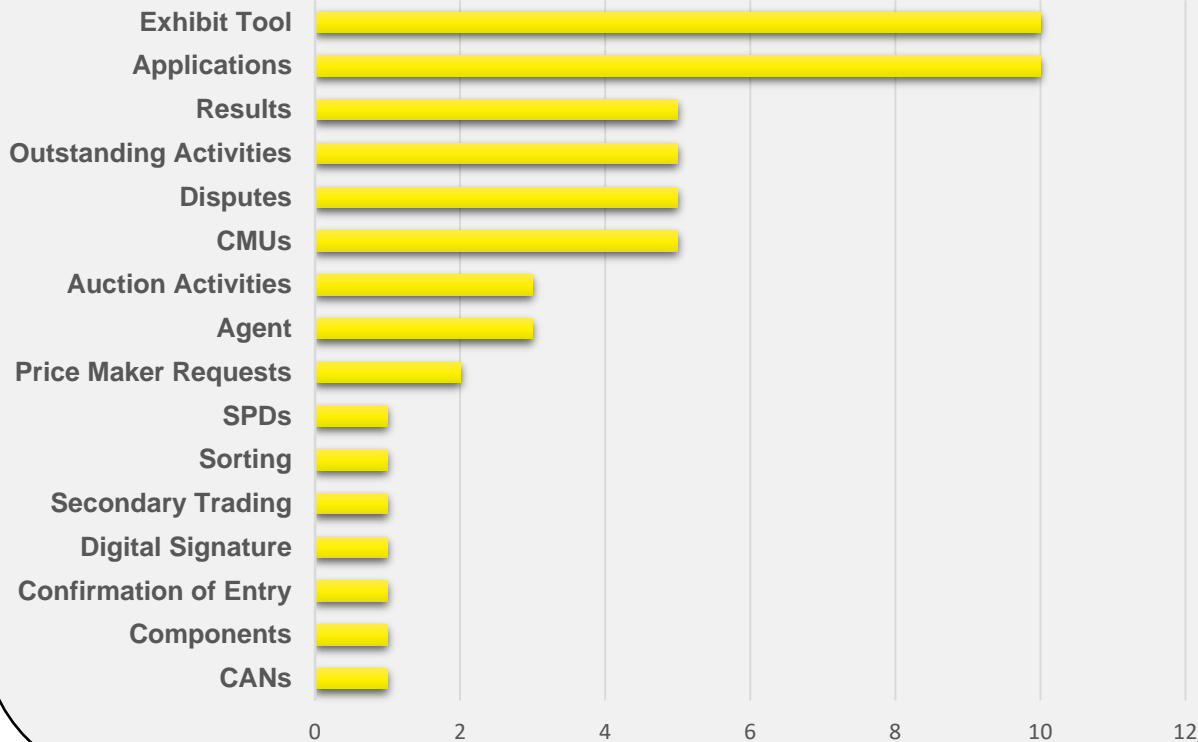
Updates during the CFW

- Update to participants every 5 working days during the CFW including a summary of participation level, issues raised and issues resolved.
- Process reminders for upcoming obligations during the CFW.
- Specific announcements, including opening and closure of the CFW, communicating cycle allocation, sharing supporting documents and emergency communication on blockers i.e. credentials release.

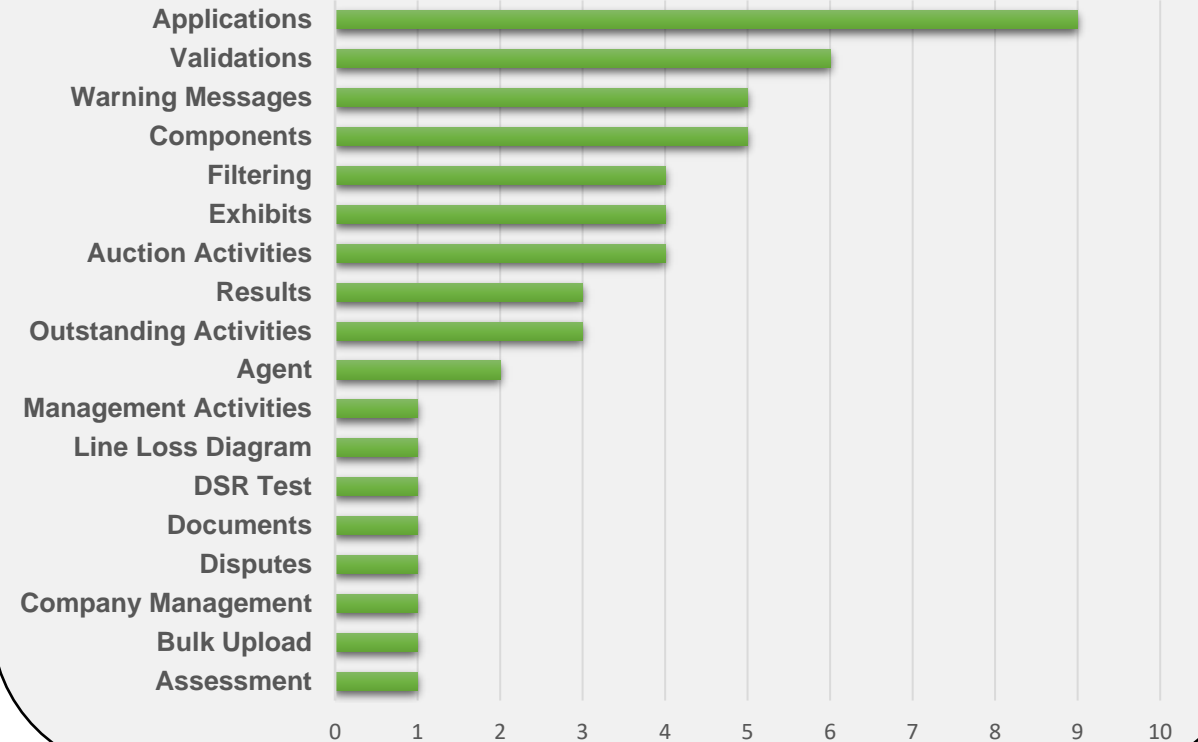
Issue Summary

122 items were raised during the CFW, both by external participants and internal team members. Of those, approximately 55 were defects and 53 were areas for future improvement. The remainder were items of feedback or general comments.

A clustered bar chart to show total number of issues raised by category



A clustered bar chart to show total number of enhancements raised, by category.



Customer Feedback – Ratings

We received 13 responses to our CFW Feedback Survey.

Participants were asked to rate the new system, and provide feedback on areas they liked, areas for improvement and the Integrated Guidance.

**How confident are you in
using the new Portal when it
goes live?**

(1 = least, 10 = most)

7.2

**How would you rate the new
Portal compared to the
current Portal?**

(1 = worse, 10 = better)

8.2

Customer Feedback – Response Summary

Positives

- ✓ The user interface and layout is much more modern, clean, streamlined and easy to navigate.
- ✓ The new system is much faster than the current system, and there is no lagging or buffering when transitioning between different areas of the portal.
- ✓ The new system is more intuitive in areas, only showing relevant criteria and having agreement deadlines and new features built-in to aid the process.
- ✓ The opportunity to explore and get familiar with the New Portal prior to the full, operational release has been appreciated.
- ✓ Increased data filtering options and download.

Areas For Improvement

- Lack of validation when required fields/questions are missed or completed incorrectly with some warning/error messages unclear.
- Issues with the Exhibit tool and digital signature process.
- The look of individual sections on the home page is too similar and confusing, in contrast to colourful icons on the current system.
- The dates of the CFW clashed with the Easter holidays period.
- Logon authentication required every time (session time).
- Application flow not always based on previous response e.g. Legal Owner v's Despatch Controller
- Some functionality not working as expected e.g. Agents, scrolling etc.

Integrated Guidance

- ❖ The Integrated Guidance was very useful, easy to navigate and a big improvement over the current guidance format.
- ❖ It is helpful to be directed to the guidance directly through the portal, and have the guidance broken down into different sections.
- ❖ The guidance videos are good, detailed and support understanding of different processes.
- ❖ Some guidance was not easily found by customers e.g. Exhibits Tool