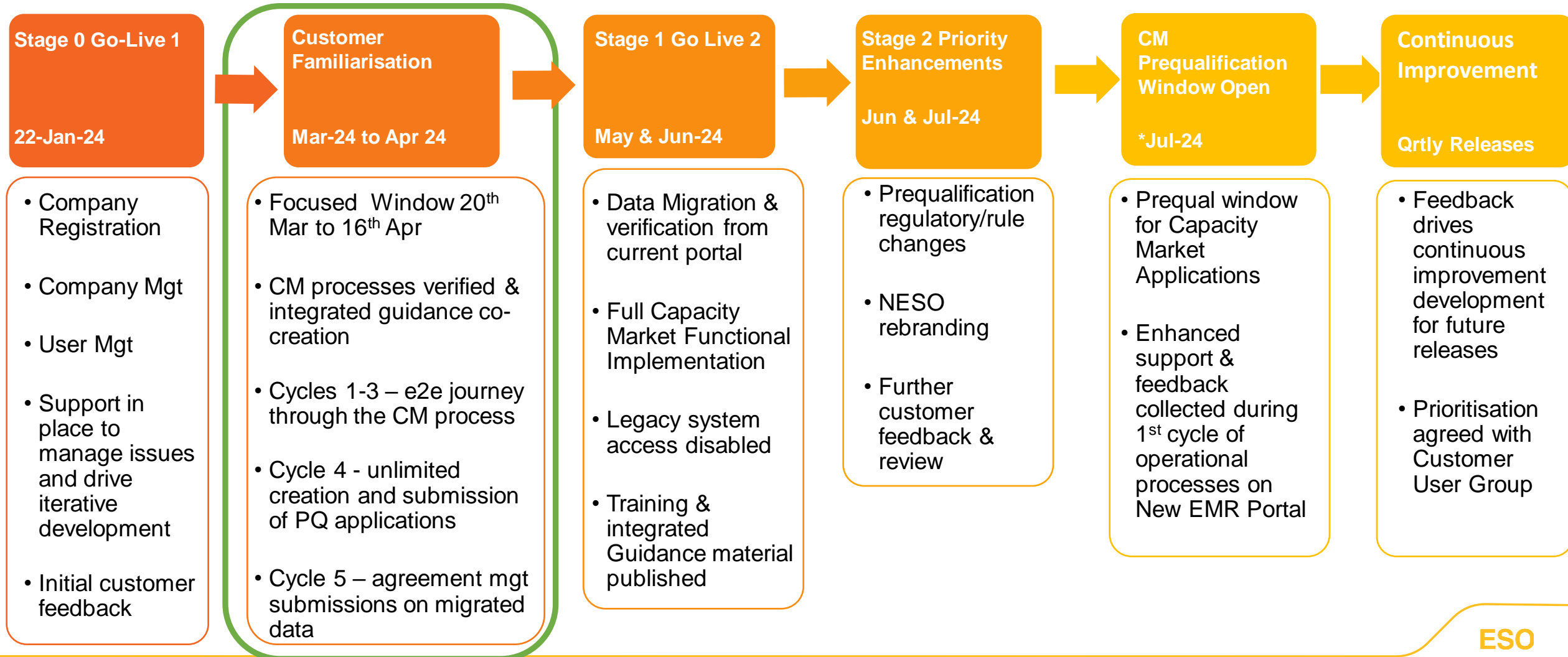# EMR Delivery Body New Portal

Customer Familiarisation Window (CFW) Summary

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Customer Familiarisation Window – Overall Context

- Go Live 1 in January was the first step enabler for the overall implementation of the New EMR Delivery Body Portal
- Customers Familiarisation phase run over Mar & Apr across test cycles to gain assurance prior to operational go-live
- Go Live 2 delivery over two phases in May and June - Data Migration and verification in May with full CM deployment and implementation in June

Stage 0 Go-Live 1
22-Jan-24
- Company Registration
- Company Mgt
- User Mgt
- Support in place to manage issues and drive iterative development
- Initial customer feedback

Customer Familiarisation
Mar-24 to Apr 24
- Focused Window 20th Mar to 16th Apr
- CM processes verified & integrated guidance co-creation
- Cycles 1-3 – e2e journey through the CM process
- Cycle 4 - unlimited creation and submission of PQ applications
- Cycle 5 – agreement mgt submissions on migrated data

Stage 1 Go Live 2
May & Jun-24
- Data Migration & verification from current portal
- Full Capacity Market Functional Implementation
- Legacy system access disabled
- Training & integrated Guidance material published

Stage 2 Priority Enhancements
Jun & Jul-24
- Prequalification regulatory/rule changes
- NESO rebranding
- Further customer feedback & review

CM Prequalification Window Open
*Jul-24
- Prequal window for Capacity Market Applications
- Enhanced support & feedback collected during 1st cycle of operational processes on New EMR Portal

Continuous Improvement
Qrtly Releases
- Feedback drives continuous improvement development for future releases
- Prioritisation agreed with Customer User Group

* Subject to operational plan timeline

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Purpose of Familiarisation Window

Confidence & Assurance

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

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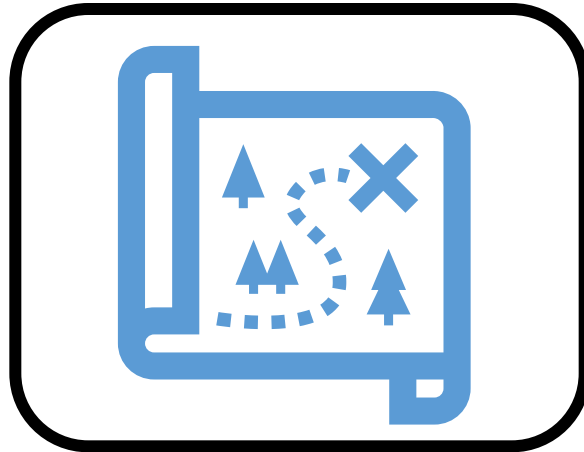
Give customers the opportunity to navigate and familiarise themselves with the New Portal system in preparation for the full operational release.

Test E2E processes

Run end-to-end processes between the Delivery Body and Customers required for go-live and operational use of the New Portal.

Provide Feedback

Collect feedback from customers on the New Portal system and enable co-creation of the integrated guidance provided identifying issues and areas for improvement.

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CFW Comms & Customer Engagement

Preparation for CFW Window

- **43 calls** held with registered participants to walk customers through the detailed CFW plans and gain clarity on participation expectations.
- CFW Webinar held on 14th March 2024, with 29 customers attending.
- CFW Information pack sent to all 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.

Post CFW

- Newsletter issued to conclude the test phase
- CFW Survey for participant feedback
- Closeout summary

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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.
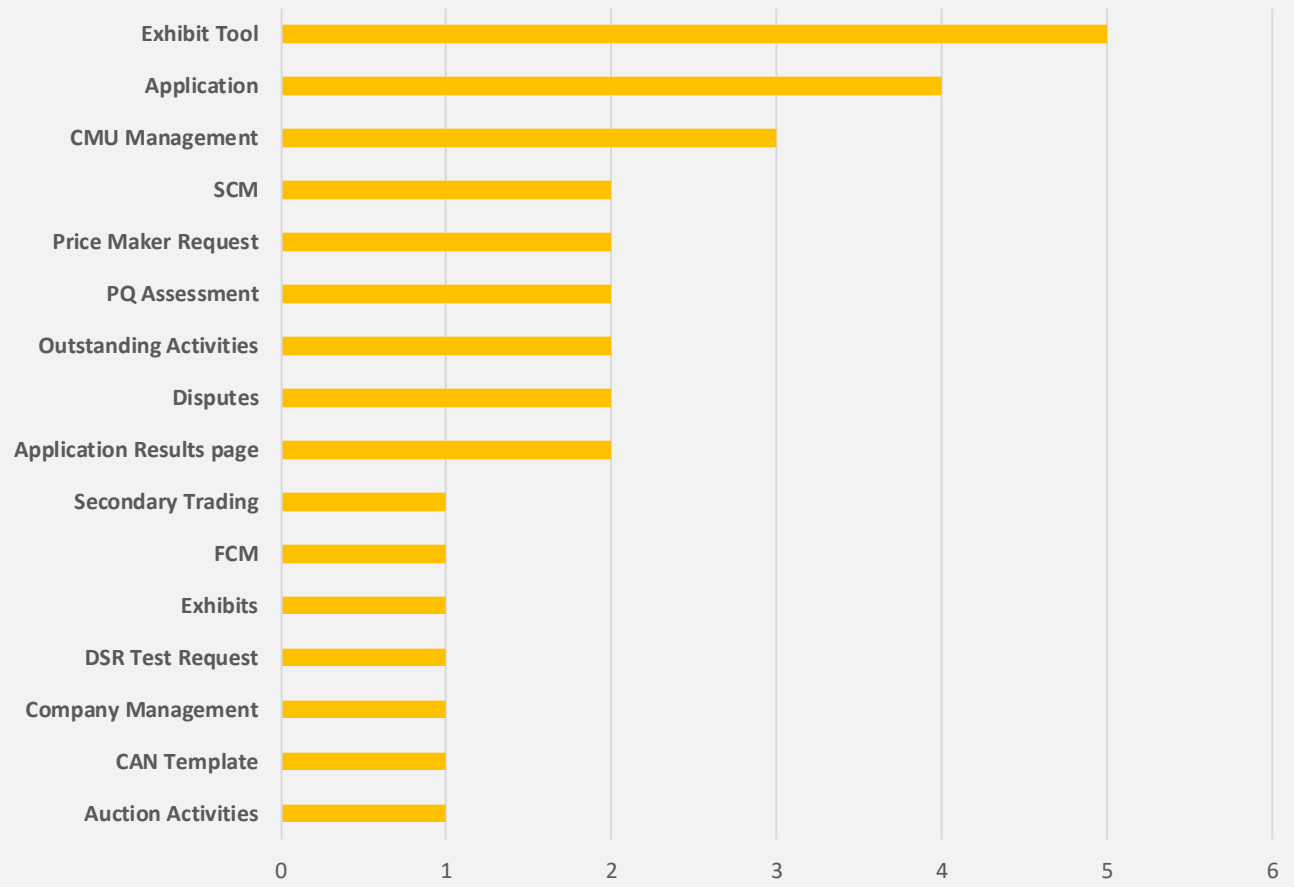
Submissions*

- 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.

* Applications and disputes were provided for process testing purposes only. The DB standardised an assessment method that did not include assessment of any data provided
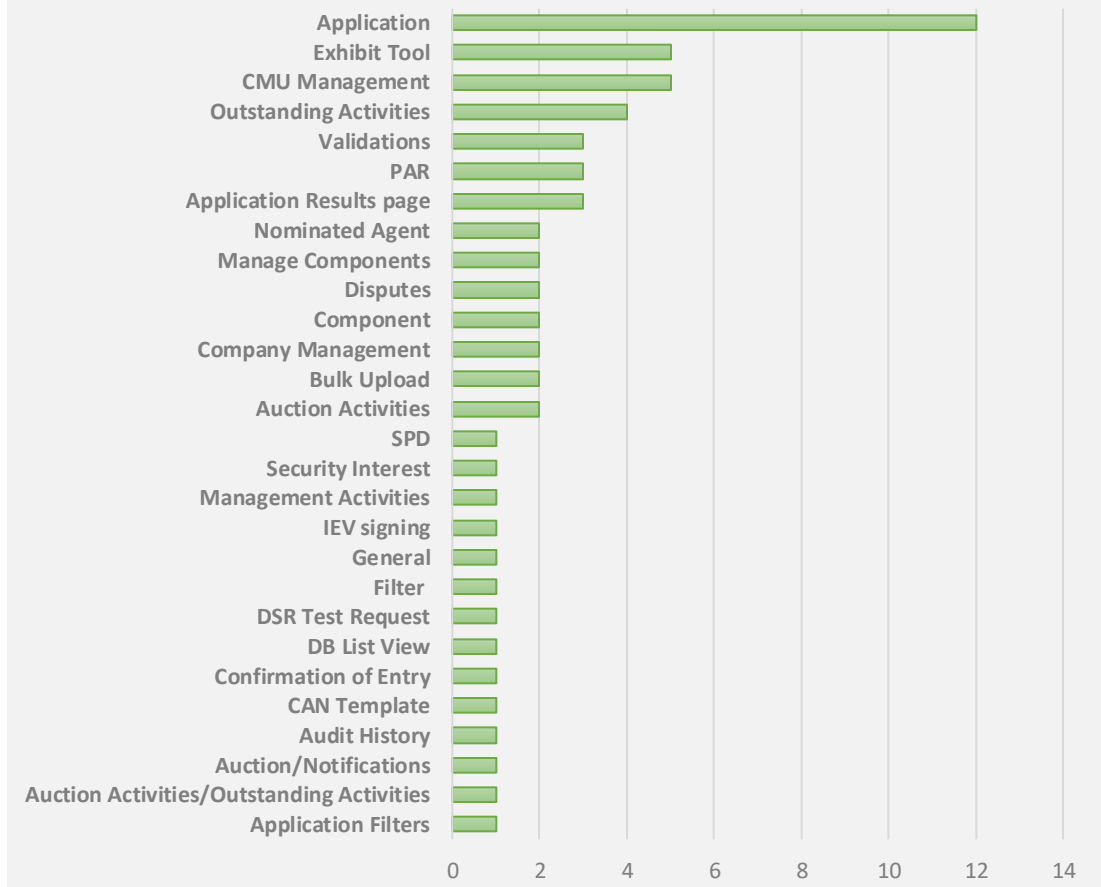
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Feedback Summary

- 119 items of feedback were raised both by external participants and internal team members
- **31** issues raised. 20 have been fixed, 11 are being tested.
- 63 enhancements will be incorporated in the continuous improvement plan.

Defects raised by category

Category	Value
Exhibit Tool	5
Application	4
CMU Management	3
SCM	2
Price Maker Request	2
PQ Assessment	2
Outstanding Activities	2
Disputes	2
Application Results page	2
Secondary Trading	1
FCM	1
Exhibits	1
DSR Test Request	1
Company Management	1
CAN Template	1
Auction Activities	1

Enhancements by category

Category	Value
Application	12
Exhibit Tool	5
CMU Management	5
Outstanding Activities	4
Validations	3
PAR	3
Application Results page	3
Nominated Agent	2
Manage Components	2
Disputes	2
Component	2
Company Management	2
Bulk Upload	2
Auction Activities	2
SPD	1
Security Interest	1
Management Activities	1
IEV signing	1
General	1
Filter	1
DSR Test Request	1
DB List View	1
Confirmation of Entry	1
CAN Template	1
Audit History	1
Auction/Notifications	1
Auction Activities/Outstanding Activities	1
Application Filters	1

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Customer Feedback – Ratings

13 responses received 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

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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.

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

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.

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