Navigating the REC Portal

A User Guide last updated in April 2024

RETAIL ENERGY CODE



Welcome to this REC User Guide.

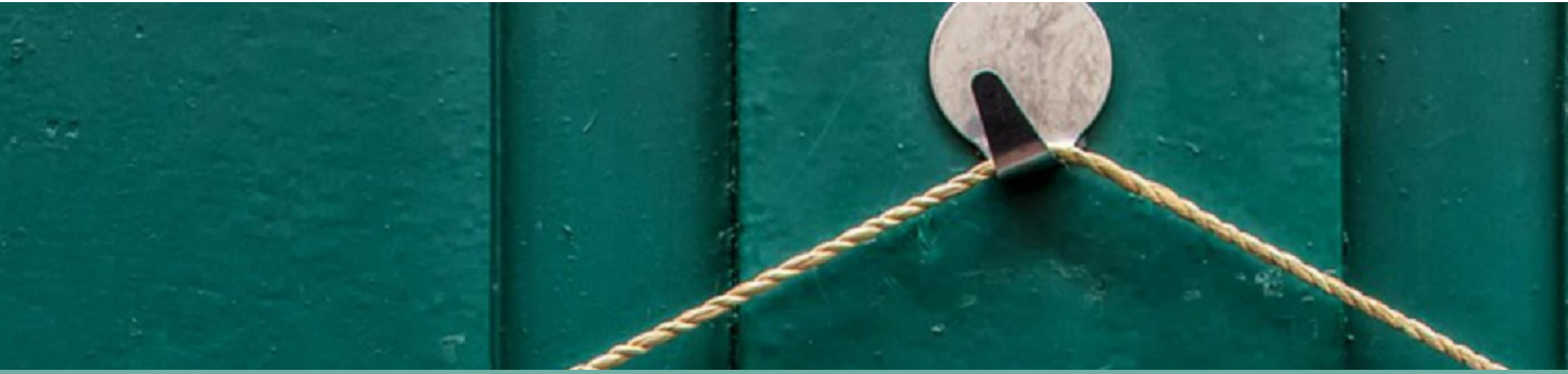
The REC Portal is the digital home of the Retail Energy Code. Maintained by the Code Manager, it has been designed to facilitate provision of information, management of data, and two-way engagement between the Code Manager and REC stakeholders.

In this document, we will provide you with information about the best ways to interact with the Portal.

In line with our principles of continuous improvement, the Portal is constantly evolving - we welcome feedback on potential areas for enhancement, and are consistently impact assessing candidates for change.

We'll update this document following each release of new Portal functionality, so you have access to the very latest information.

ACCESS THE REC PORTAL



Creating a Portal User account

Where we explore the benefits of setting yourself up as a registered Portal User, and how to go about it



Anyone can create a user account on the REC Portal. The process is easy, quick, and completely free.

Although much information is openly accessible on the REC Portal, having a user account opens certain information that would otherwise be restricted.

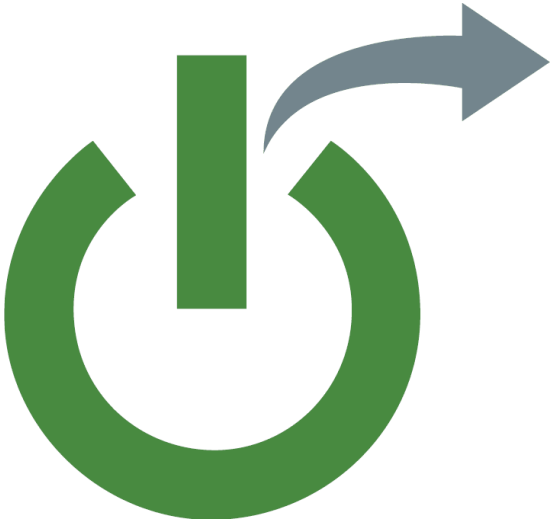
This includes the ability to raise tickets into our Service Desk, and enter our Committee Workspaces.

When Portal Users log in, it also provides us with valuable insight into how our stakeholders interact with the Portal - and we use this feedback to plan improvements to our service.

To register an account, click **Log In** in the top right of the screen, and follow the simple wizard. Note - you can only create a basic user profile through this process. You'll need to get in touch with our Service Desk to be granted special permissions associated with other roles (see Portal User roles).

Alternatively, your Organisation's MAU can set up your account and assign certain roles (Performance Assurance, Contract Manager, and MAU) to your new account. For further information with audio and guidance documents see attached. – REC Portal MAU User Guide.

VISIT THE PORTAL TO SIGN UP NOW





Portal User roles

Where we explore the different profiles of Portal User and how that impacts the information they can see



The permissions and access rights that you have been granted are dependent on the Portal User role that you have been assigned. Let's explore those roles.



Standard user

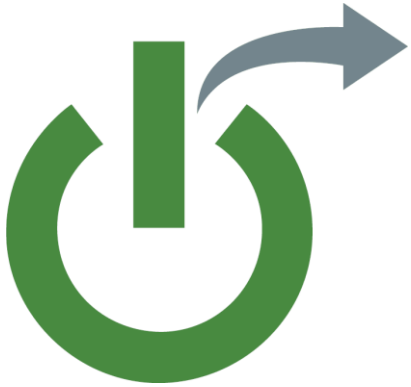
You have access to all the public-facing information, plus:

- You can view the news on the homepage.
- You can view the Useful Documents module on the Dashboard
- You can access the Party Operations area
- You can make an Application to accede to the REC and/or REC services
- You can start the process to Withdraw from the REC
- You can download the REC Party Register
- You can access Change information, raise new Change Proposals and more
- You can access Committee Workspaces
- You can raise Service Desk tickets and view your open tickets
- You can access the REC Wiki
- You can access EMAR and the Digital Navigator
- You can set a profile image and define account settings

Committee Member

You've been nominated as an industry representative on one of our Committees. Now you have all the permissions of a standard user, plus you can access:

- Documents within your Committee Workspace that are marked as restricted
- The facility to cast online votes where decisions are required outside of meetings
- A Collaboration Space where you can engage with other Committee Members



Contract Manager

The Contract Manager role is designated to the individual appointed as a contractual contact within an organisation. The Contract Manager is a primary point of contact for many operational matters and is the main point of escalation for the Code Manager.

The Contract Manager has all the permissions associated with a standard user and can also access the Operational Contacts register on the Party Operations page.

Performance Assurance User

Performance Assurance Users have all the permissions associated with standard users, but are also granted the ability to access, download, and upload performance assurance reporting and data through the Party Operations area on the Portal.

Master Admin User

The Master Admin User (MAU) has additional privileges that allow the user to manage organisational data.

As an MAU, you can define hierarchies of organisations within your business (allowing you to group distinct legal entities and distinguish parts of the business operating different market participant roles).

The MAU can create other users, and is responsible for assigning user roles, granting permissions associated with MAU, Contract Manager, and Performance Assurance user types.

Contact your organisation's MAU if you think you may not have the required permissions assigned to you.

Director

The Director role allows you to complete Performance Assurance forms for assessment. The Code Manager requires confirmation of the Director Role each year through written consent from a Company House Director. To initiate or renew the setup of the Director Role, please contact the Code Manager via the Service Desk.

Performance Assurance Dashboard Viewer

If you have this role and the Performance Assurance role, you will be able to access and view your organisation's Performance Assurance Dashboard. With this access, you will be able to see your organisation's Overall Score, Peer Comparison, and a breakdown of scores related to Retail Risks and Theft.

RETAIL ENERGY CODE



Navigating the REC Portal

Where we explore the various distinct areas that make up the REC Portal



In this section, we'll take a closer look at some of the individual pages on the REC Portal, and how you can get the most value from them.

Some Portal areas are significant enough to have their own User Guides; where this is the case, we've embedded a link to the separate document so you can easily navigate there.

MY DASHBOARD

REC NEWS

REC DOCUMENTS

PARTY OPERATIONS

CHANGE AND RELEASE

COMMITTEES

KNOWLEDGE CENTRE

SERVICE DESK

DIGITAL REC AND EMAR



My Dashboard

The homepage of the REC Portal will usually be the first place you arrive. Most information on the homepage can be viewed by anyone, but a small number of features are only accessible once you've logged into your account. From this page you can:

Log In or Register Your Account

Look for the Log In button in the top-right corner.

Navigate the Portal

Key areas are listed on the mega menu whilst other useful links are found in the REC Information box.

View Important Messages

When we've got information to tell you about the Portal - e.g. maintenance - we add it to the news carousel on the homepage.

Access Your Notifications (log-in required)

The bell in the top-right corner will let you know when you have an unread notification. You'll be notified of different activities on the Portal depending on your User Role and preferences.

The Code Manager continues to review the homepage, improving the relevance of information held, personalisation of information, ease of navigation, and general user experience. We'll update this User Guide whenever we implement improvements.

REC Events

The REC Events page contains key dates for upcoming events from the Code Manager where you'll find registration links as well as access to past events held by the Code Manager.

REC Bulletin

On the REC Bulletin page you can view historic editions of the weekly bulletins sent out by the Code Manager - both Weekly Bulletin and Change Bulletin. You can also click a button to sign up to receive the bulletins to your email every week.

REC Documents

From REC Documents, access downloadable versions of the REC Schedules, User Guides, templates, and pertinent documentation.

The REC provides links to the REC main body, REC Schedules, Services Specifications, and Data Specification information.

Category 3 Products is home to each of the Category 3 documents as detailed in the REC Baseline Statement, including certain Operational Documents.

User Guides (non-Category 3) hosts User Guides that are maintained by the Code Manager but are not listed on the REC Baseline Statement.

REC Forms and Templates contains documentation of that type, supported processes including Category 3 Change Proposal Form, REC NIL Submission Template, Initial Assessment Report, Change Proposal Plan, Party Impact Assessment, Service Provider Impact Assessment, Consultation Response Template, Preliminary Change Report, Release Plan, Copy of Change Proposal Form.

Stakeholder Engagement Products is where you can access the Code Manager's Stakeholder Engagement Plan.

REC Release Information will provide you with information that supports future releases.

Feedback is always welcome by completing Feedback and Surveys - REC Portal or see REC Portal enhancements by clicking here Portal Enhancements - REC Portal

Have some news that could be relevant to include in the Weekly Bulletin? Get in touch via communications@recmanager.co.uk to let us know.

Party Operations

The Party Operations area of the Portal is the place to manage all your Party information. In this area you can:

Make an application to join the REC and access REC Services

Click on Applications to be guided through an application form where you can apply for access to the REC and its systems.

Advise that you are withdrawing from the REC

If you are voluntarily withdrawing from the REC click on Withdrawing from the REC to start the process.

View the Operational Contacts for each REC Party

If you're a Contract Manager, you can access Operational Contacts to find details of responsible people from REC Parties.

View the Sandbox Trial and Derogation Register

This register shows all the current applications and statuses for Sandbox Trials and Derogations. The Sandbox and Derogation User Guide provides more information about this process and how to apply.

View the REC Party Register

The Register shows information about Parties that have acceded to the REC including the date the Party acceded, their MPID or Short Gas Code, the type of role they have acceded to the REC with and the Contract Manager for the Party and their contact details.

Change and Release

Find out about everything to do with Change in the **REC Change and Release** section - from raising a Change Proposal, viewing current Changes going through the Change Management process.

Change Register gives you a high level view of all Change Proposals both historic and current.

The **Impact Assessment** and **Consultations** tiles take to you active Changes in each of these stages. Click on the Change you're interested in to access all associated documents. You can also upload and add your response to any Impact Assessment or Consultation.

The **Code Roadmap** is linked and presented in the Digital Navigator. It provides an evolution plan for the REC to allow for better planning

Prioritisation Matrix this is used to determine the Priority Status for a Change. Guidance on how to use the Matrix and the scoring system are included.

To raise a new Change Request use the **New Change Proposal** tile to be taken to an online form that will guide you through the process.

The **Change and Release** page also holds the **Release Schedule** showing the release dates and their planned changes. Information relating to specific releases can be found here: REC Releases.



Click the image to access the Change Process User Guide for further information and useful guidance

Service Desk

The REC Service Desk is designed to provide you with the support you need. If you are unable to find the answer to your question or have queries about the REC you can contact our Service Management desk through the Live Chat. You can also send us an email if you can't access the Portal for any reason.

REC SERVICE DESK

EMAIL THE SERVICE DESK

Use the **Let's Chat** function to talk in real-time with us or click on **Raise a Ticket** where you can fill in an online form and we will respond to you. This function is only available within working hours and is accessible through most pages on the portal.

You can keep up to date with any tickets that you have raised by viewing the **My Open Tickets** which provides you with an overview of how your query is being resolved including the date that we expect to have responded to you.



Committees

The Committee Management area of the REC Portal provides you with all the information about REC Committees.

Here you can view all the active REC Committees in the **REC Committee Workspace** and view information about that Committee including the Terms of Reference, the members of the Committee and how to contact the Committee Secretary. Upcoming meeting dates can also be found on this page for all committees.

Your access to the Committee Management area of the REC Portal is different dependent on whether you are a member of a Committee.

Most Portal Users will be able to access the workspace and see the documents library. If you are a member of a Committee, you will have additional access to action logs, collaboration spaces and online voting in addition to restricted documents for the committee you attend.

But even as a non-Committee Member, you can be sure to find all documentation related to REC Committees, and future meeting dates, by navigating to these Workspaces on the Portal.



Click the image to learn more about functionality specifically available to Committee Members

EMAR and the Digital Navigator

This EMAR and the Digital Navigator area of the REC Portal holds the complete digital version of the REC in the Energy Market Architecture Repository (EMAR). This In this area you can navigate the Code, search for market messages, download and view data specification, track all change proposals in the **Code Roadmap** and view future releases.

The EMAR Project Dashboard has a series of tabs you can navigate between to access different areas. If you wish you can also create your own tailored dashboard with the information that is most relevant to you by clicking on your user profile in the top right hand corner and selecting my personal dashboard.

The EMAR User Guide has detailed step by step instructions on the EMAR and how to access information.

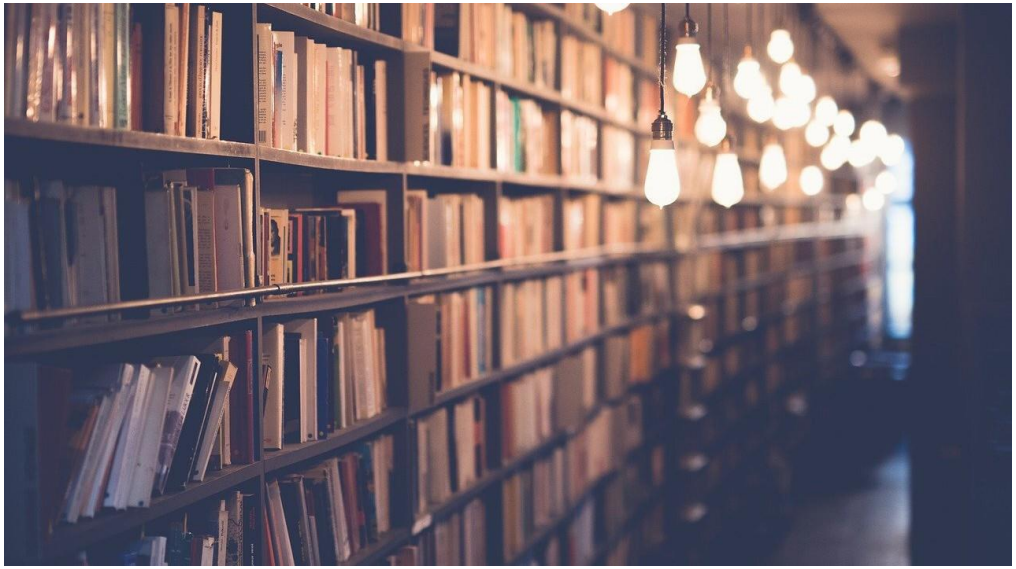
The EMAR is fully searchable – use the search bar in the top right hand corner to find terms and clauses within the Schedules, search for a data item or market message.

Knowledge Centre

Our REC Wiki is home to a great number of information articles about processes and terms associated with the REC.

It's designed to have the look and feel of Wikipedia to make it as simple as possible to navigate. You can search for individual articles, or use the links within articles to jump to another related article.

If you have an idea for a REC Wiki article that doesn't currently exist - or want to suggest an amendment to an existing article - drop us a ticket into the Service Desk and we'll take a look.





Account settings

Where we explore the ways you can define your personal information and preferences



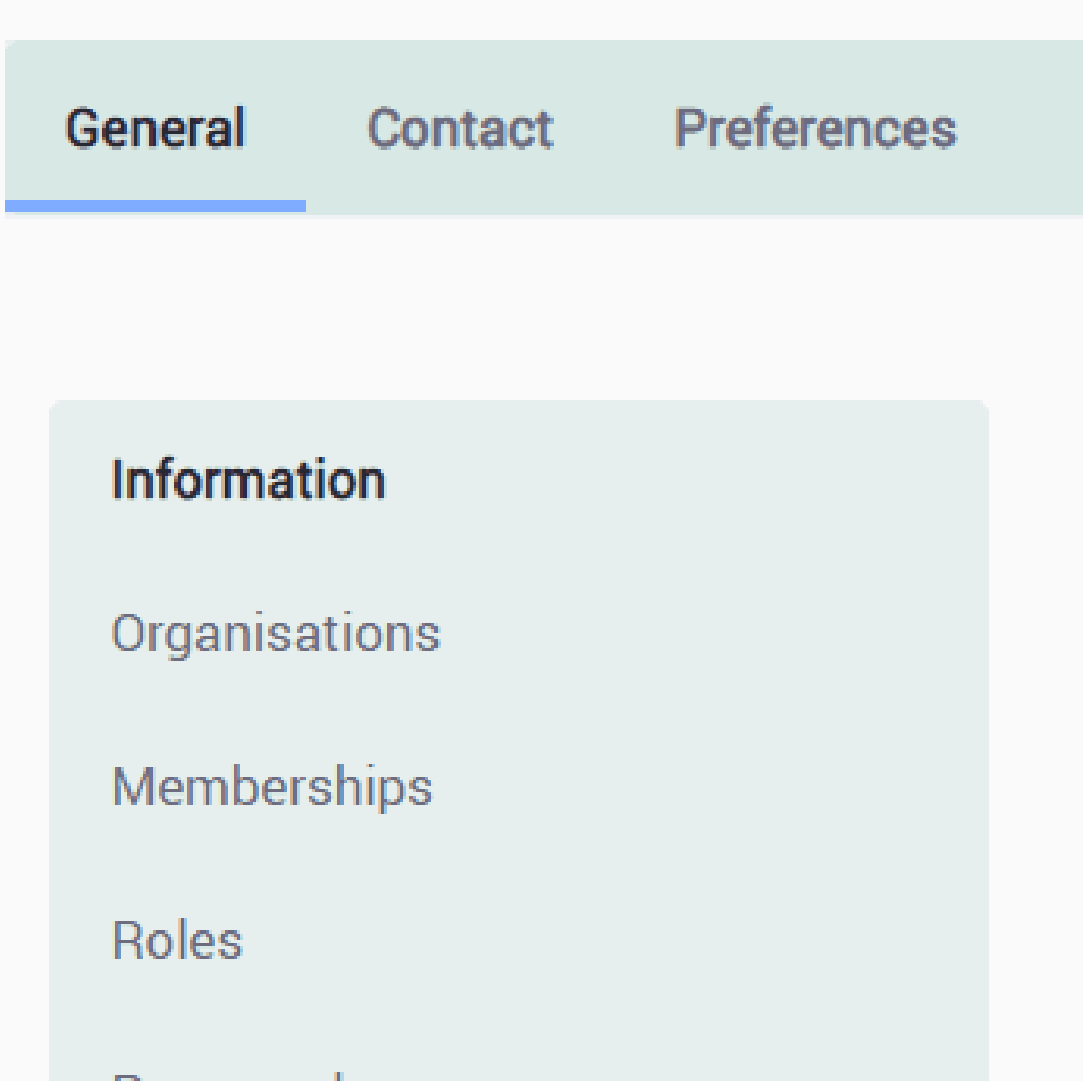
We believe that you should have the ability to tailor your experience on the REC Portal. Managing your account settings help ensure that we can make things work for you.

You can update your information in Account Settings in three key areas on the Portal:

General
Here you can view and update your personal information, view organisation and memberships details as well as your role(s).

Contact
Here you can view and update contact information including phone numbers, websites, and Social Network user information. To update your email address you must contact the Service Desk.

Preferences
Here you can choose how to be informed of alerts and announcements. Within the 'Display Settings' function, you can personalise your time zone and change your Welcome message.





Notifications

Where we explore the purpose of notifications on the REC Portal

Sometimes we'll want to let you know when something happens on the REC Portal. Our notification system is designed to give you a heads up.

Keep an eye on the bell icon in the top-right corner of the REC Portal. Depending on your preferences, Portal User type, or Committee Member status, you'll be notified when certain events happen on the Portal.

This includes when a consultation period opens on a Change Proposal, when an action is assigned to you by a Committee, or when an Application you have made progresses to a next stage.

If you've got access to one of the Committee collaboration spaces as a Committee Member, you can also subscribe to forum threads or topics, which means you'll be notified whenever there is new activity for you to take a look at.

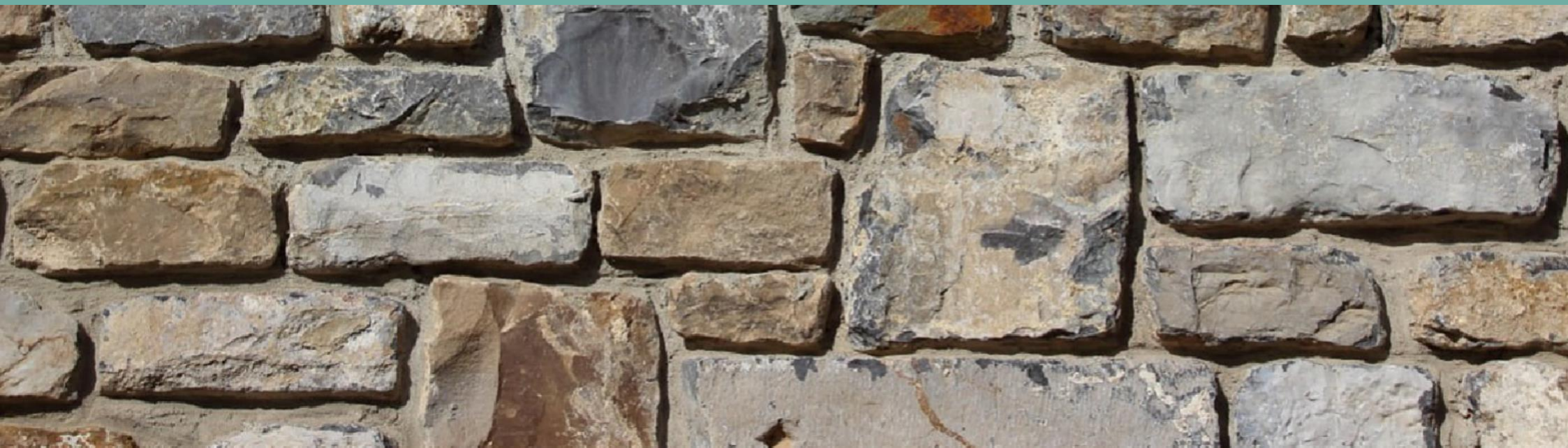
We're working to make further enhancements to the subscription and notification functionality over the next few REC Portal releases - keep an eye on the REC Bulletins for more information about that.





Organisation Management

Where we explore how company structures are defined within the Portal



Making sure that your organisation is set up in the right way on the REC Portal allows us to ensure the right associations between your company information and assigned users.

Portal Users assigned with the MAU (Master Admin User) status are responsible for ensuring that their organisation is configured in the right way on the REC Portal.

If you are an MAU and you need to change how your organisation is displayed or need to split your organisation into different groups (example: metering, gas etc), please contact the Service Desk. Your query will be actioned by the REC Portal Team.

You can also speak to your Operational Account Manager (OAM) to have this change raised on your behalf. The same can be said if you need to add/remove MPIDs associated with your organisation. Similarly, if you need to assign a user to your organisation with defined permissions, please speak to us.

CONTACT SERVICE DESK

Visit Service Desk



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Technical Requirements

Where we explore the minimum browser requirements for accessing the REC Portal features



Browser Compatibility



The REC Portal is compatible with current versions of all major browsers including **Google Chrome**, **Safari**, **Edge** and **Firefox**.

The REC Portal is not tested or supported for older browsers. If your organisation intends to use a browser other than Chrome, Safari, Edge or Firefox please get in touch with us.

EMAIL THE SERVICE DESK

REC SERVICE DESK

Troubleshooting

Remember to contact the REC Service Desk if you're having issues navigating the REC Portal.

If you're experiencing issues with modules appearing to overlap, or menu items being obscured by other components on the Portal, **first try reducing the zoom** within your internet browser settings. We're working on a solution to make the Portal more scalable to different window sizes and on mobile devices.

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Thank you for reading

Navigating the REC Portal: a REC User Guide

enquiries@recmanager.co.uk



POWERED BY Turtl