Connections Portal - Stakeholder Feedback Q&A

Overview

We have collated the feedback you provided us with into two main sections - Section 1 from the event itself and Section 2 from the User testing. We've then broadly grouped the feedback within Section 1 into 4 areas – Capabilities, Collaborative Working, Accounts and General Feedback for ease of reference and due to the volume of feedback.

Section 1 - Event Feedback

Capabilities

- Will the Portal show what is happening behind the scenes, for instance when we are embedded in Scotland, and we apply for a BEGA that also triggers NGESO issuing an AtV to the Scottish DNO?

  For MVP (Minimum Viable Product) release you will only be able to see the actions that are in respect of your Application and Offer documents. We will consider the AtV process between NGESO and the DNO for future releases.

- Will the system be able to cope with Novation's, e.g., company name changes for a particular project/scheme, but contact/account holders stay the same?

  Although the Novation process will not be run in the Portal currently, any actions taken offline will be reflected in the records held within the Portal.

- Will the Portal guide you to documents and sheets that need filling in as part of the applications?

  Yes, the Portal will show guidance notes while completing the applications and has a traffic light system to guide you to errors on the form / missing information.

- Will securities be included and methods to recover over payments?

  This is not in scope for MVP, however we will consider for future releases. We are however building the functionality to download your security statements from the Portal. We will be looking to add a range of financial information in coming releases but for MVP this will be limited to downloading documents and the current process will be ran offline via your CCM.

- Will it be possible to raise technical queries regarding offers via the Portal?

  Yes, users will be able to raise queries via the Porta through a query management function.

- Will it be possible to accept Offers (signatures) via the Portal?

  Yes, this will form part of the future releases.

- On the application form can you part complete and log out and then come back later to finish off, or does it all need to be done in one visit?

  You will be able to complete any application over a number of visits. The application can be saved as many times as required before final submission. Please note, you will not be able to edit any application once you have submitted.

- Can one user start the application & then another user completes & submits it?

  Yes, all the users registered under a company will have access to all the applications.

- Can an application be viewed/and or worked on by more than one user at the same time?

  Yes, however please be aware for the current planned release it will be the last person to save their changes that are reflected in the system.

- Is there an overall summary page before we submit the application? Just to see the entire application in a glance.

  This is not in scope for MVP, however you can review any application by expanding each section before final submission. There is also an onscreen summary displayed but this is currently after you have submitted.

- Can the Portal arrange pre app calls?

  You will be able to use the Portal to request a pre app meeting and submit the pre app form with your details. The system will then notify the relevant people who will then organise the meeting. You will be able to track progress in the Portal of when the request has been actioned and a meeting arranged. Your CCM / or the administration team will then be in contact with a calendar invite to confirm.

Collaborative Working

- Will there be any interaction with the relevant TO through this Portal?

  Yes, we are currently working with all three TOs in the development of future releases of the Portal. The main aspect we will be focusing on is the data exchange between the various companies both pre and post Offer.

- Is there scope to actually have/develop this as a single Portal funded and agreed by DNO & TOs so that there's consistency in data and process ?

  This may be something to look at in the future. Integration with other portals is not something that is in scope for our initial release but is something on the wider scope for the future.

- Is this Portal used for applications in all three TO areas?

  Yes, the Portal will be used for any type of application across all TOs.

Accounts

- We use grid consultants, so will they be able to access the Portal? We also develop sites under SPVs so will need to grant access to grid consultants to a specific SPV project and not our whole portfolio.

  Yes, the Portal will allow defined access to the required SPV projects to the required users. You will have the ability to determine what can be viewed and who can of your company records. This functionality is planned for the next release.

- Will the system cope with same email address for different companies?

  Users linked with SPVs will be able to access the system using a single email address.

- Can we have one access for multiple companies?

  Users linked with SPVs will be able to access the system using a single email address.

- Is there an option to add multiple users to one registered business, as there are a few members of our team?

Up to five users can be registered under a company for our first release in July.

- Is there a way of verifying that the user works for that company in terms of security? Also, in terms of GDPR? if the notification to the "Super User" is sharing personal details...

  We are working on processes to enhance the verification process for the Super User registering under a company. This will involve an offline process where the Super User will require to be validated both by NGESO and the particular company in question before being granted access. We will be detailing this process as part of the user guidance for the Portal. We are also working closely with our Legal team on GDPR compliance. In particular reference to personal details of a user, this notification will only contain a name and business email address.

- There should be some overview of the user/Super User concept on the front page so people signing up are aware of this and the implications etc...

  We will look to incorporate this feedback as part of the design for the Portal.

- Can a Super User change who is the Super User? for e.g. if someone is leaving the role / company Perhaps a right click to make Super User option?

  Yes, the Portal will have a user management functionality will allow a company to manage both Super Users & standard users.

- Why is the number of additional users limited?

  For initial release we have provided up to 5 users per company based on an average of current active contacts we interact with within the Connection Teams. We will continue to monitor this and adjust if necessary.

General

- Will Portal make Account Managers redundant?

  No, Account Managers are key part of the Connection process. The Portal will help to automate and streamline the Connection process allowing CCMs more time to focus on the relationship with their Customers and Stakeholders.

- Will the current process be still available if Customers do not want to switch to the Portal?

  For a limited period, we will be running the current process alongside, however we will be moving the applications process fully to the Portal to gain the full benefits the Portal can offer.

- Is it possible for draft apps to have a more useful reference name, rather than an application number in the stored applications part of the Portal?

  Portal will show the project name in addition to the system generated reference number.

- Does the MFA phone app user account have to be created using the same email address / company details as the Connection Portal account ?

  You don't need to create an account on the Salesforce Authenticator app. The app will automatically detect the relevant username. Upon registration you will be sent guidance which will walk through all the necessary MFA steps.

- During the application process, if there is the need to submit additional information or revised information, can this be done on the Portal or will this be done via the current process (email CCM etc)?

  The Portal will have the ability to upload documentation however the application itself cannot be changed once submitted. Your CCM will still be managing your application as normal so any issues can be directed to your CCM via email or via the Portal.

- Will it link into the S37 consenting process?

There are no plans to link the S37 consenting process currently. However, as your consenting progresses (and the evidence is submitted to your CCM) you will see this reflected in your projects status in the Portal as well as the change applied to your security statements.

- Will it be possible to accept Offers (signatures) via the Portal?

  Yes, we will be working on this functionality for future releases.

Section 2 - UAT Feedback

Thank you for all of your feedback you provided as part of the User testing. We will be using this as the basis for further development of the Portal and is valuable insight. Please find below the feedback that was provided for your reference:

- I don't have landline – don't feel this should be mandatory in the registration phase? It's not in the application stages.
- Our registration email is taking very long time to come through to receive password.
- As a user I think there is delay until the Super User approves? – this need to made clear on the webpage pop up after verifying
- Plant type – would be good to be able to double click or click and drag? Or needs a description to "click arrow" as selection this is not intuitive- why not just tick boxes?
- Date format shows in grey "DD-MM-YYYY" but then requires long form "DD MMM YYYY" with spaces not dashes, so you can't just intuitively type?
- Should show an example format required in the phone number fields. Where country code is provided in the previous field, it's not clear whether you should include "0" at the start.
- Consent status- could this work better as a 2-part question – drop down list (Fully consent/ in progress/not started… etc.), plus a free text box to elaborate?
- I might have missed it, but I don't recall there being a privacy policy or a statement on how my data would be used? Needed with active agreement for GDPR
- User concept: One "Super User" could be supporting projects across multiple limited companies. One user could be submitting application on behalf of multiple companies. Whether a user or Super User, I would want to be able to see all application I am making or contributing to.
- What company should your user account be registered against - the company you are applying on behalf of or the company you are employed by?
- Ultimately, when I log in as a user, I would like to be able to see all the projects I am working on regardless of the company they are on behalf of. I am not sure the concept of aligning user accounts to registered business is going to work for this.
- Could an alternative be to have additional field on the pre-app/application to identify connection stakeholders that should have access (email/unique ID?), which then makes the application accessible in their viewer?
- It was quite a long session to effectively watch someone filling in a form for the majority of it. A well designed form shouldn't require someone to show you how to user it! Better would have been to get everyone to register in advance – then get the feedback in the session. Didn't feel was a great user of time. Or focus the time on the conceptual aspects (User/Super User, linked to business, limit of 5)

Next Steps

We will now be working on the next phase of development and using your feedback to shape this. We are currently busy planning the next Show & Listen event and will release details closer to the time. In the meanwhile if you have any further questions or feedback please contact the team [here](#).