

DCOM business readiness support session



Today's agenda

- 1 | May look ahead
- 2 | Market user agreement update
- 3 | Market acceptance testing deep-dive
- 4 | Devolved admin training modules
- 5 | System roles and responsibilities
- 6 | Next steps and Q&A



How is your feedback being implemented?

What we've heard

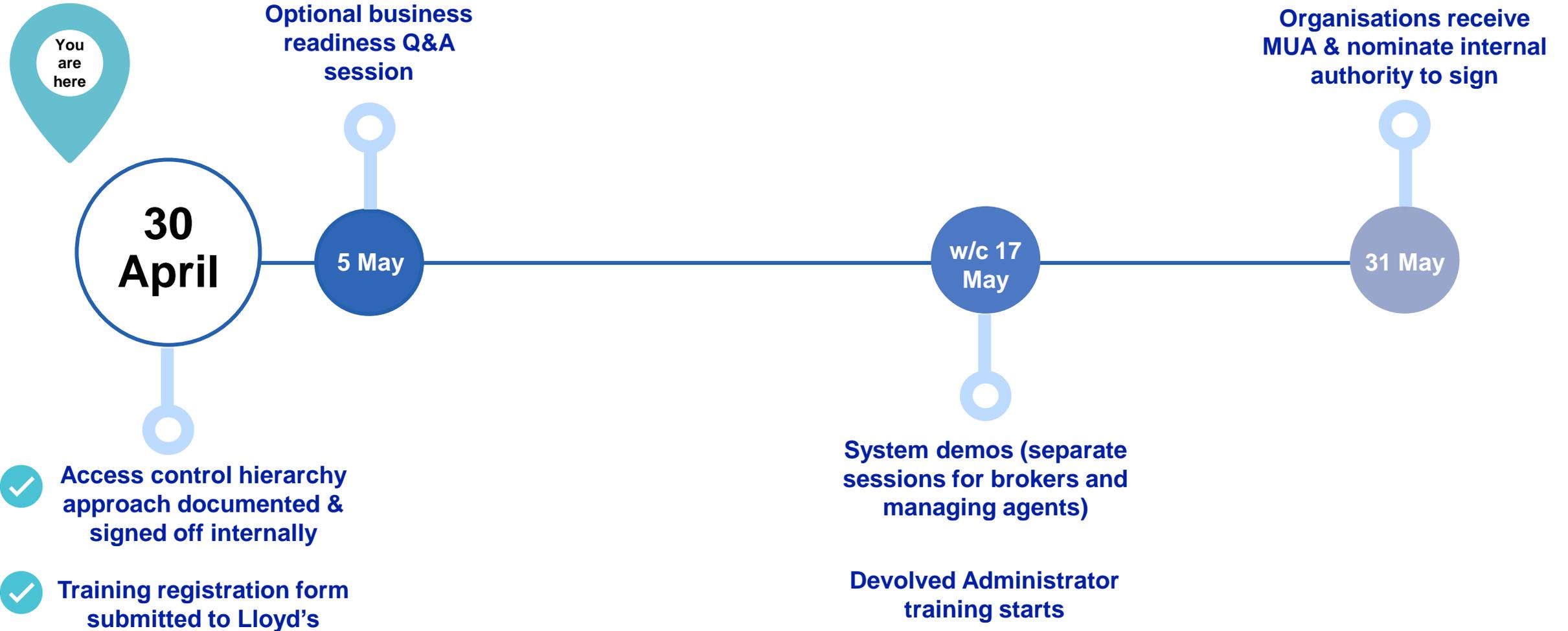
- Change Leads need greater visibility of upcoming business readiness deadlines
- Not clear on MAT issues raised by participants & how they're being resolved
- Useful to have a pre-read of the business readiness support session slides
- Clarity needed on MUA status & when organisations will receive the agreement
- More opportunities to see contract manager functionality



What we're doing

- Updated business readiness checklist available on [Change Lead site](#)
- More in-depth update to be provided in today's session
- Presentation will be sent to Change Leads 2 days ahead of the session
- Update to be covered in today's session
- Live demos to be held (starting w/c 17 May) for users to familiarise themselves with the contract management functionality

Monthly look ahead



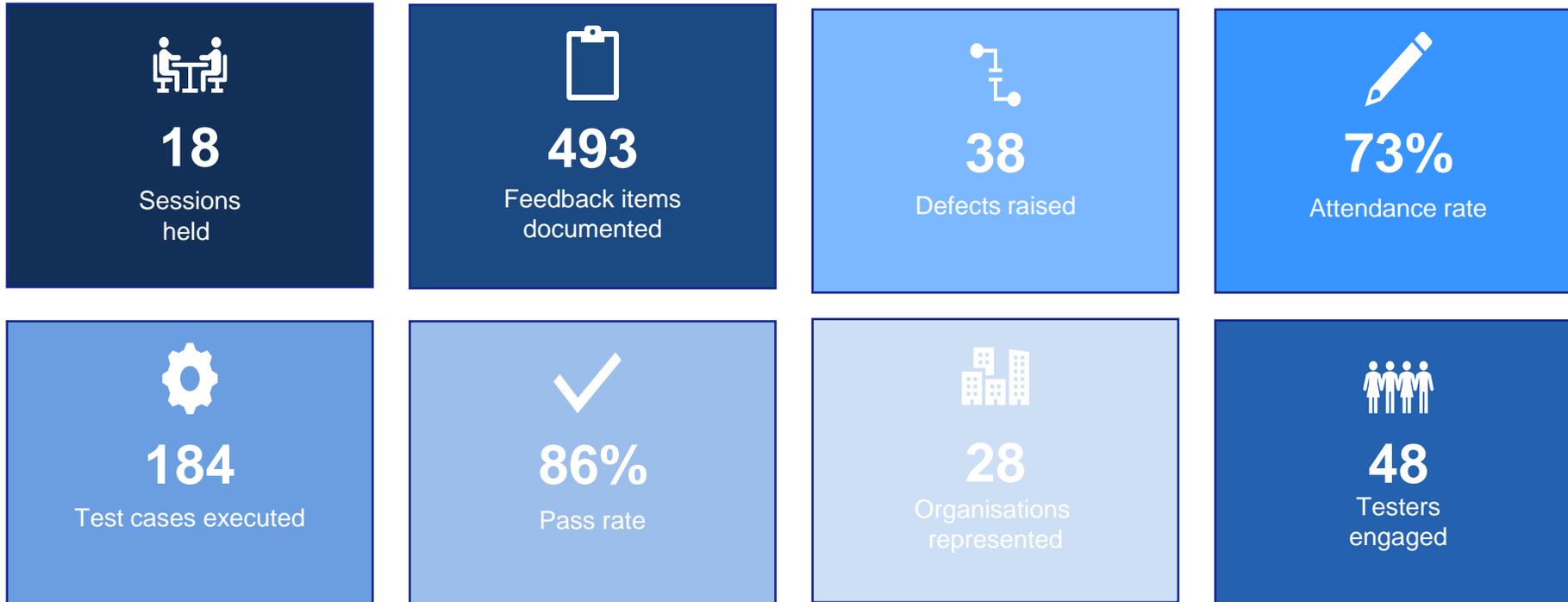
Market User Agreement (MUA) Update

- The MUA is now ready to be sent out, provided an organisation has “registered.”
- It will be automatically sent to the Legal Signatory.
- The MUA contains the main terms governing the market user’s access to, and use of, the platform.
- A Service Management Document will also be sent, which forms part of the Master User Agreement and sets out the services description, minimum IT requirements, the Acceptable Use Policy, support services and information security services in relation to the platform.
- The MUA contains standard terms that would normally be expected in an agreement of this type, including user obligations, warranties, intellectual property rights, confidentiality, security and suspension, data protection and boilerplate provisions.

Please note

The platform is provided on a ‘one to many’ basis and therefore the Market User Agreement is a standard form agreement and, as is the case with similar arrangements, changes cannot be accommodated or managed, and so the Market User Agreement must be signed in an unamended form by all market users. Lloyd’s has consulted with market panels from both the LMA and LIIBA in preparing the standard form Market User Agreement, and taken into account many of their helpful comments.

MAT round 1 summary



All numbers are up-to-date as of 6 April 2021

MAT common themes

EXAMPLES INCLUDE

DEFECTS

- Slow system performance e.g. coverholder Search / Linking contracts / generating registration
- Duplicates within reference data
- Difficulty in uploading documents
- 'Dealing direct' not working as expected
- UI/UX not displayed correctly



NEXT STEPS

- These are all being investigated
- Where the system does not behave as intended, a fix will be prioritised ahead of Release 1 go-live
- Some were known about prior to MAT and work is already ongoing/completed to address

ENHANCEMENTS

- Improve usability of validation error messages
- Improve usability of territorial limits accordion
- Improve usability of common & individual section details tabs (incl. automatically opening 'individual sections' tab when clicking on page after submit for review)
- Auto populate UMR with Contract Admin CSN
- Increased sign-posting and help text



- All suggestions are being logged and prioritised
- We will explore options to improve for the biggest 'pain points' e.g. validation error messages, but there will not be capacity to action every enhancement suggestion
- Some feedback is user specific and contradicts other points made, in these instances we will use existing forums e.g. market panel to find a consensus
- Enhancements will be addressed as part of Release 1 and future releases

MAT validation error messages

Context

- We know participants had challenges with error messages
- They were built in such a way as to maximise system performance and allow users to freely move around the workflow
- We have previously explored options to address this but have been constrained by team capacity and inherent functionality of Pega
- Some of these options would require significant manual effort to implement
- However, we are looking into their causes to reduce errors

What we've heard

- You only know of an error message once you navigate away from the page/submit for review
- You can't easily find the field to which the error relates in the Section Details page (includes being taken back to Common section details not Individual section details)
- When you've fixed the error message you need to navigate away from the page before it removes the error message

Potential enhancements for discussion (not all will be possible for Release 1)

1. Add 'Expand all' button to open all accordions (to enable users to quickly and easily open all accordions and use 'Ctrl F' search functionality to find the corresponding field)
2. Add 'Validate' button (to enable users to view errors prior to submitting for review)
3. Real time validations (to proactively alert users to an error in a particular field before proceeding)
4. Error messages to operate as a hyperlink (to enable a user to navigate to an error immediately by clicking on the error message)
5. More detail in error message re. location of error message (to state the accordion in which the error message appears)

Devolved Administrator training modules

Training will cover how to:

- An Introduction to Delegated Contract and Oversight Manager
- An Overview of User Hierarchies
- The Role of the Devolved Administrator
- Adding Devolved Administrators
- Understand the function of the Domain User Group
- Creating and Maintaining a Managerial Group
- Creating and Maintaining User Groups
- Maintaining Users and their Access Permissions
- Sorting, Searching and Filtering User Lists
- Notifications
- Approving users to access DCOM

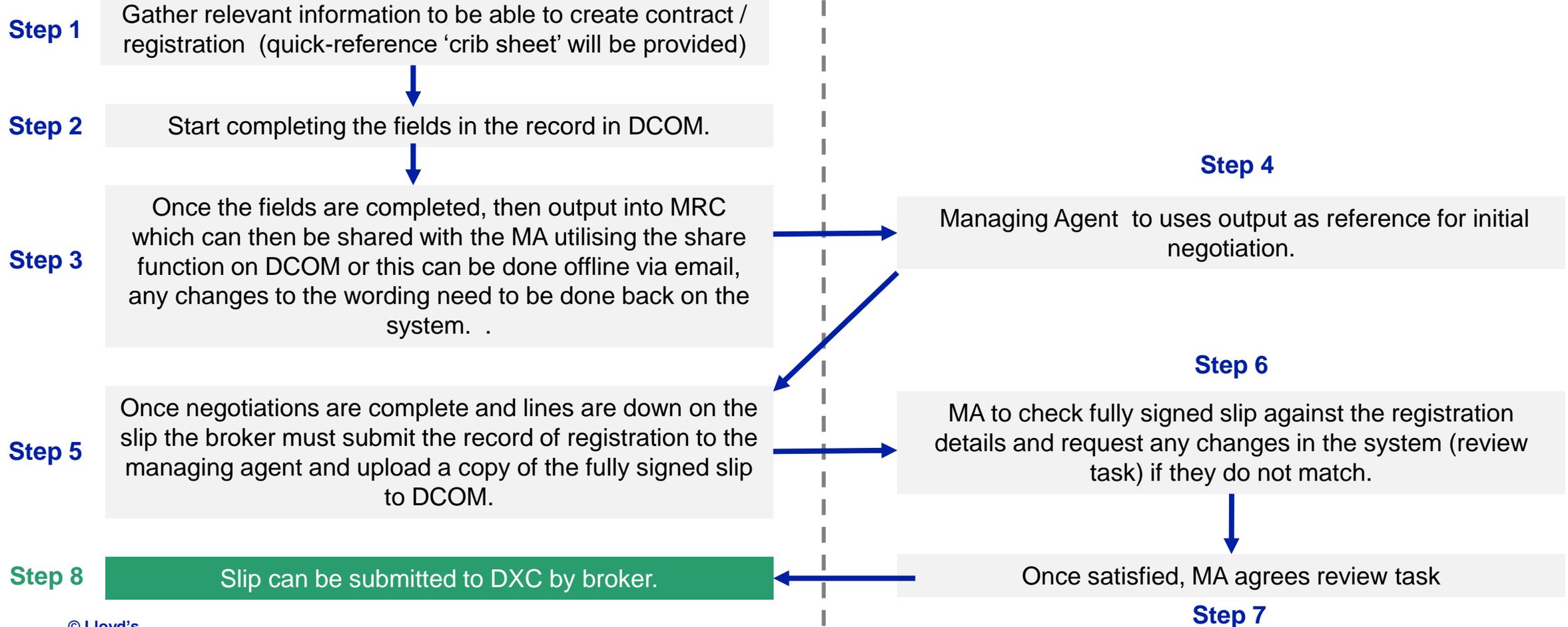
Roles in the system



Broker



Managing Agent



MA role in the system

LLOYD'S Delegated contract manager Help and support FL

Create Registration

Contract ID: DA-CH-210415-0010 Contract Type: Binding Authority Agreement UMR: B1731FLF150421PR2 **UNDER REVIEW (CONTRACT CREATOR UPDATING)**

Auto Save Refresh Participant Data Actions

Agreement Template General Contract Information Broker Details Contract Leads Section Details Non-Schedule Data **Actions**

Available next actions

On this page, you can complete a number of actions to progress your registration. These actions can be completed in any order and at different times as you move through completing the wording before submitting for review to the Lloyd's lead(s).

Set Contract Wording Visibility

Share visibility of draft wording

Sharing this contract draft gives market participants visibility of this proposed wording, which can't be undone. Initially visibility of this task will be given to the managerial user group of each relevant market participant in the contract, who may then choose to delegate access to other user groups from their organisation.

Back **What happens next?** Save **Submit For Review**

When the contract is complete and ready to be registered, you submit it to the Lloyd's lead(s) to review.

This is a Draft Registration that the Broker is creating, they have ticked the Share Visibility which allows the Leads on the contract to view the record.

MA role in the system

The screenshot displays the LLOYD'S Delegated contract manager interface. The main content area shows the 'Contract record' for Contract ID: DA-CH-210415-0010, UMR: B1731FLF150421PR2, and Status: Draft. The 'Section Details' tab is active, showing the following information:

Section ID(s)	Description
001	Property

Additional details include:

- Section Start Date: 15-Apr-2021
- Section End Date: 14-Apr-2022

Expandable sections are listed below:

- > Coverholder Details
- > Person(s) Responsible for Operation and Control
- > Authorised Class(es) of Business and Coverage(s)
- > Territorial Limitations
- > Gross Premium Income Limit

When the Broker shares the Draft Registration, the Leads can view the content using the Contract Record page. All of the information in the Draft Registration is visible.

MA role in the system

LLOYD'S Delegated contract manager

Home | My Tasks | My Team(s) Tasks | Completed Tasks | Ongoing Task(s) | Search Contract | Reports | Recents

Create Registration

Contract ID: DA-CH-210415-0010 | Contract Type: Binding Authority Agreement | UMR: B1731FLF150421PR2 | **UNDER REVIEW (CONTRACT CREATOR UPDATING)**

Auto Save Refresh Participant Data Actions

Generate contract documents

You may want to generate draft versions of your contract. Select the component parts you wish to export and press generate. Once generated your document will be made available to you in the Associated Content section below.

- Wording
- Schedule
- Non-schedule

[Generate document](#)

Download registration document

You can generate a copy of just the registration information you have populated in this system. This will generate a PDF document for you to save, download and print. This will not be attached to the contract on the system.

[Download registration information](#)

[Back](#)

What happens next?

When the contract is complete and ready to be registered, you submit it to the Lloyd's lead(s) to review.

[Save](#) [Submit For Review](#)

The Contract Creator can generate draft versions of the Registration as a Word doc or download a PDF which consists of the Registration information only.

MA role in the system

The screenshot displays the 'Create Registration' interface in the LLOYD'S Delegated contract manager. The top navigation bar includes the LLOYD'S logo, the title 'Delegated contract manager', and a 'Help and support' link. The main content area is titled 'Create Registration' and shows contract details: 'Contract ID: DA-CH-210415-0010', 'Contract Type: Binding Authority Agreement', and 'UMR: B1731FLF150421PR2'. A status indicator 'UNDER REVIEW (LEAD(S) REVIEWING)' is present. Below this is a 'Contract Task Progress' section with a 'View all' toggle. The task progress table lists tasks and their assigned users:

Task	Assigned to
— Wait for Contract Reviews (Registration Review)	deferred@Lloyds
Registration Review (Version:1) (R-2934)	Open
Registration Review (Version:2) (R-3025)	Open
— Contract Review	MU MG User

A 'Begin' button is highlighted with a dashed red box. Below the table, there are three tabs: 'CREATE REGISTRATION' (checked), 'REGISTRATION REVIEW', and 'COMPLETION'. The 'REGISTRATION REVIEW' tab is active, showing details for 'Agreement Template LMA3113' and 'Contract Type Binding Authority Agreement'. Below this is an 'Organisation' section with a table:

Contract Administrator	PIN

On the right side, there is a 'Participants (6)' list with the following entries: 'Restaurant Pretzle Inc', 'Fitting Barrow Group', and 'Lubrication Southern Co.'.

A Lead will be required to Review and Approve the Registration contents. When the creator submits the registration for review, the Lead will be able find the record and start the review by clicking on the begin button.

MA role in the system

The screenshot displays the LLOYD'S Delegated contract manager interface. The main content area shows a "Registration Review (Version:2)" form for Contract ID: DA-CH-210415-0010 and UMR: B1731FLF150421PR2, which is currently "UNDER REVIEW (LEAD(S) REVIEWING)".

Organisation

Contract Administrator	PIN
Fitting Barrow Group	850086CRG

Central Settlement Number

Number	Pseudonym
1731	QYH

Feedback

Type your feedback here. Please ensure that you clearly reference the part you are feeding back on.

Registration Approval ⓘ

Approve Return

Buttons: Cancel, Save, Continue

Case details

Created by
Fiona Lambert-Fraser (6m ago)

Tags +

Open assignments

Review Feedback (Review) ⓘ (Current)
MG User

Related cases +

No items

The Lead will be required to review the contents prior to Approving or Returning the registration with Review queries/comments. This submit and review process will continue until the Lead is satisfied that the Registration contents are correct.

Next steps

- **Review and share** today's presentation and the recording with all DA Managers in your group
- If you haven't already, **confirm** names of end-users requiring instructor led training, using the training registration form **(ASAP)**
- **Ensure** your organisation's Registrant has completed the registration form, as part of the onboarding process **(by 30 April)**
- **Attend** optional business readiness Q&A session, and invite relevant SMEs (e.g. DA compliance) to join you **(on 5 May)**
- **Attend** optional contract manager demos **w/c 17 May** (invites to be issued next week)
- **Join** the next DCOM business readiness support session **on 19 May** (invites to be issued next week)

