LLOYD'S

DCOM business readiness support session

LLOYD'S

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

LLOYD'S

How is your feedback being implemented?

What we've heard	What we're doing
Change Leads need greater visibility of upcoming business readiness deadlines	Updated business readiness checklist available on Change Lead site
Not clear on MAT issues raised by participants & how they're being resolved	More in-depth update to be provided in today's session
Useful to have a pre-read of the business readiness support session slides	Presentation will be sent to Change Leads 2 days ahead of the session
Clarity needed on MUA status & when organisations will receive the agreement	Update to be covered in today's session
More opportunities to see contract manager functionality	Live demos to be held (starting w/c 17 May) for users to familiarise themselves with the contract management functionality

LLOYD'S

Monthly look ahead

You are here

30 April

- ✓ Access control hierarchy approach documented & signed off internally
- ✓ Training registration form submitted to Lloyd's

5 May

Optional business readiness Q&A session

w/c 17 May

System demos (separate sessions for brokers and managing agents)

Devolved Administrator training starts

31 May

Organisations receive MUA & nominate internal authority to sign

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

18
Sessions held

493
Feedback items documented

38
Defects raised

73%
Attendance rate

184
Test cases executed

86%
Pass rate

28
Organisations represented

48
Testers engaged

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

LLOYD'S

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

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

NEXT STEPS

Defects:

- ➢ 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:

- ➢ 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*

Step 1 (Broker): Gather relevant information to be able to create contract / registration (quick-reference ‘crib sheet’ will be provided)

Step 2 (Broker): Start completing the fields in the record in DCOM.

Step 3 (Broker): Once the fields are completed, then output into MRC which can then be shared with the MA utilising the share function on DCOM or this can be done offline via email, any changes to the wording need to be done back on the system. .

Step 4 (Managing Agent): Managing Agent to uses output as reference for initial negotiation.

Step 5 (Broker): Once negotiations are complete and lines are down on the slip the broker must submit the record of registration to the managing agent and upload a copy of the fully signed slip to DCOM.

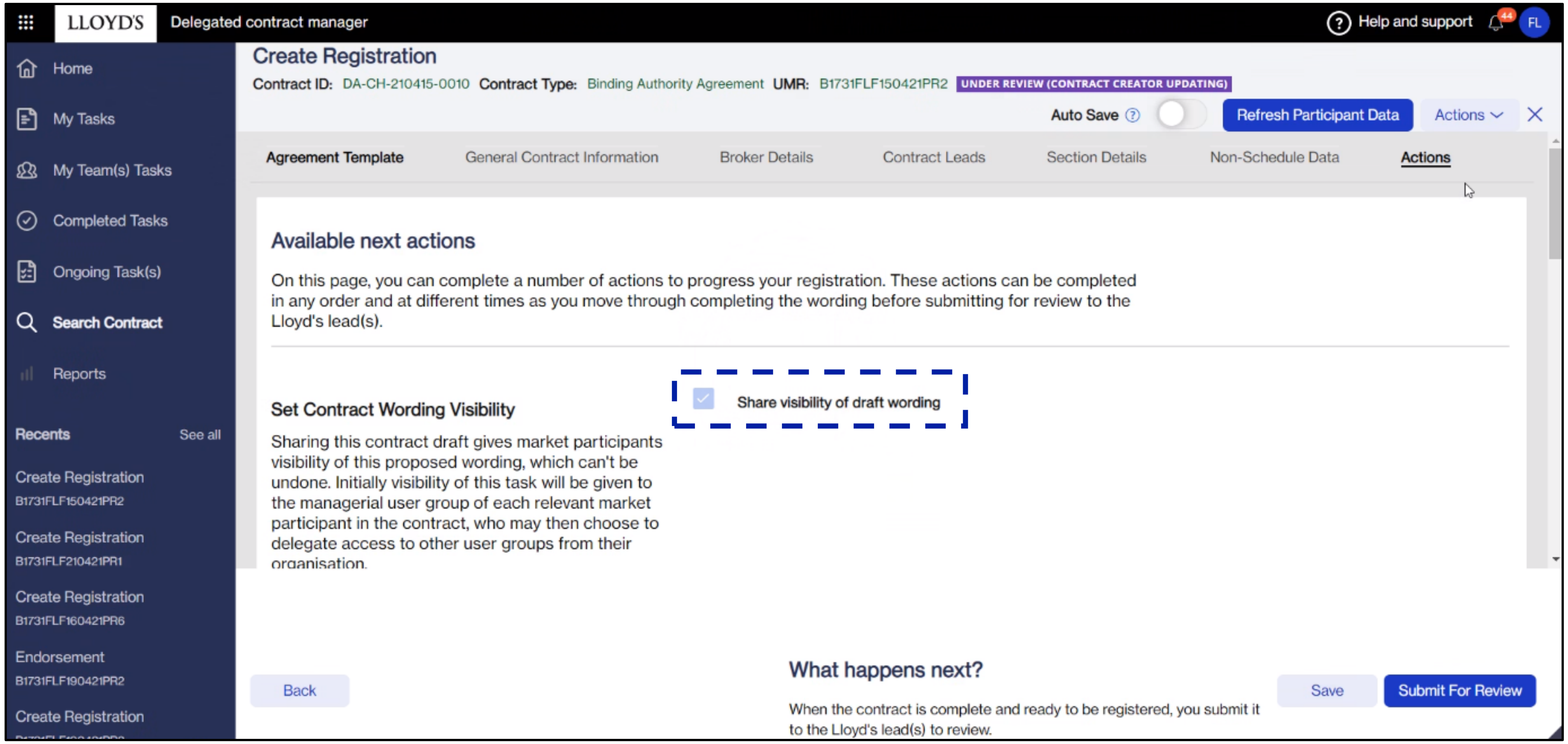
Step 6 (Managing Agent): MA to check fully signed slip against the registration details and request any changes in the system (review task) if they do not match.

Step 7 (Managing Agent): Once satisfied, MA agrees review task

Step 8 (Broker): Slip can be submitted to DXC by broker.

LLOYD'S

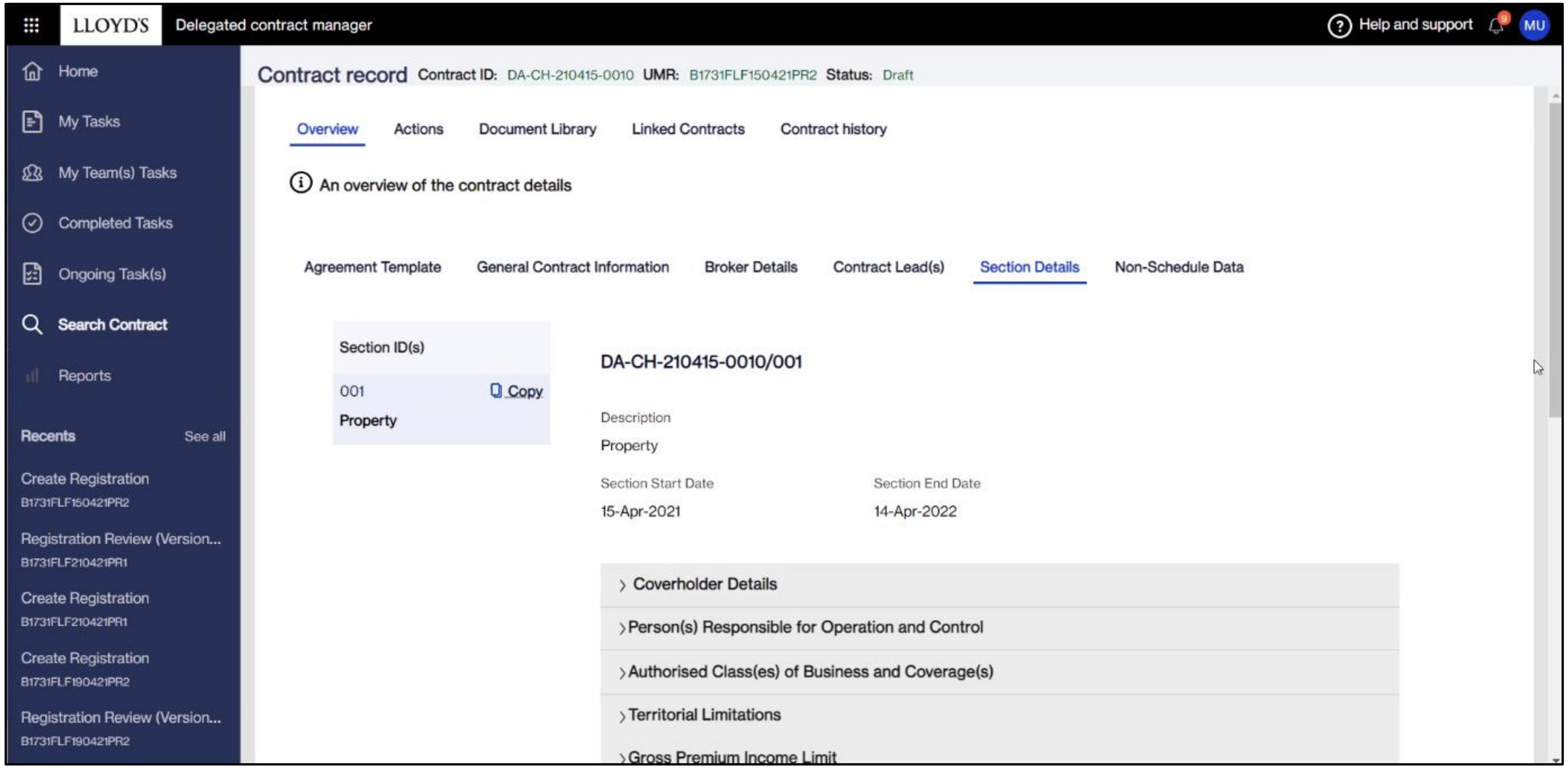
MA role in the system



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.

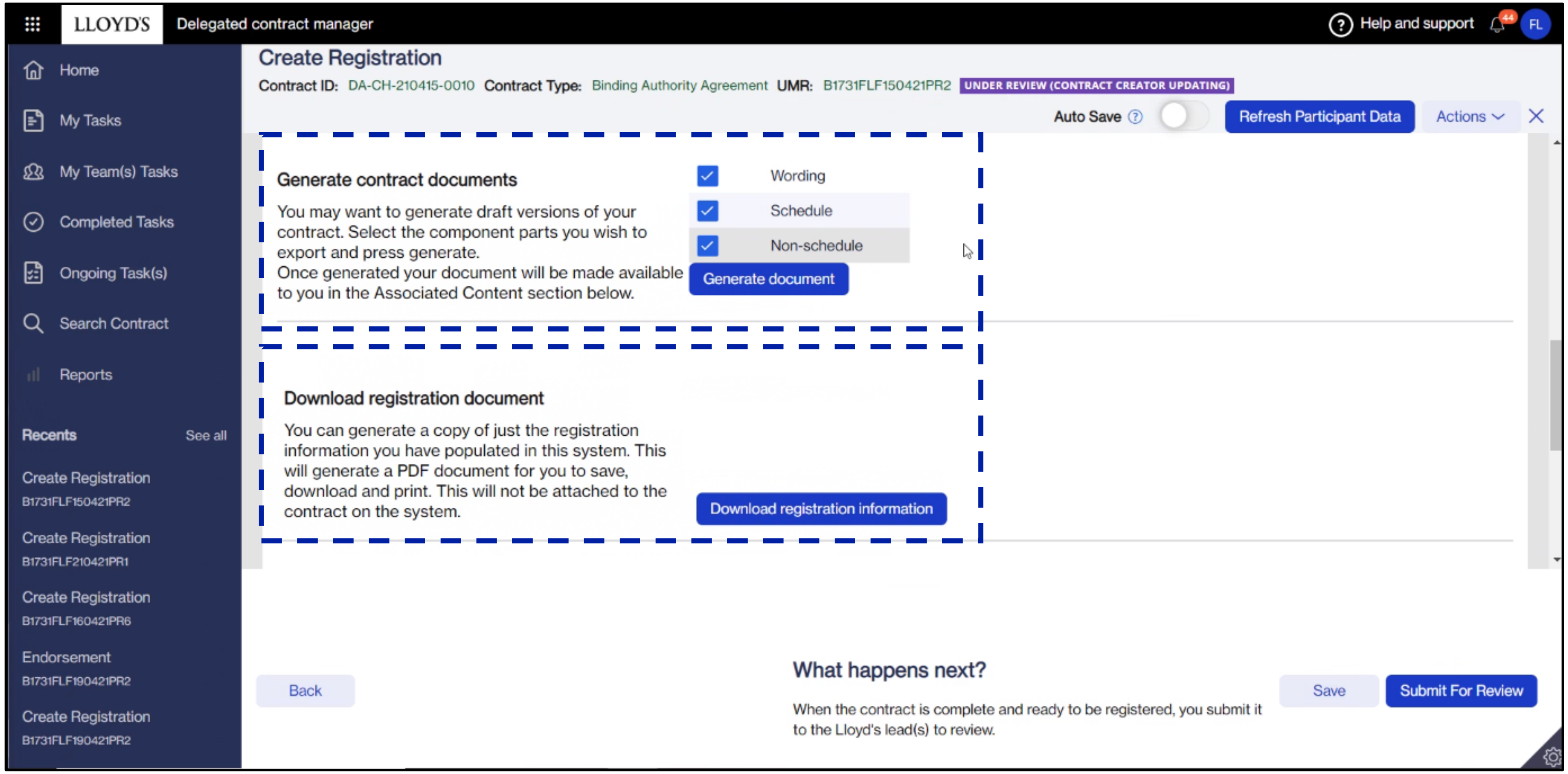
LLOYD'S

MA role in the system



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.

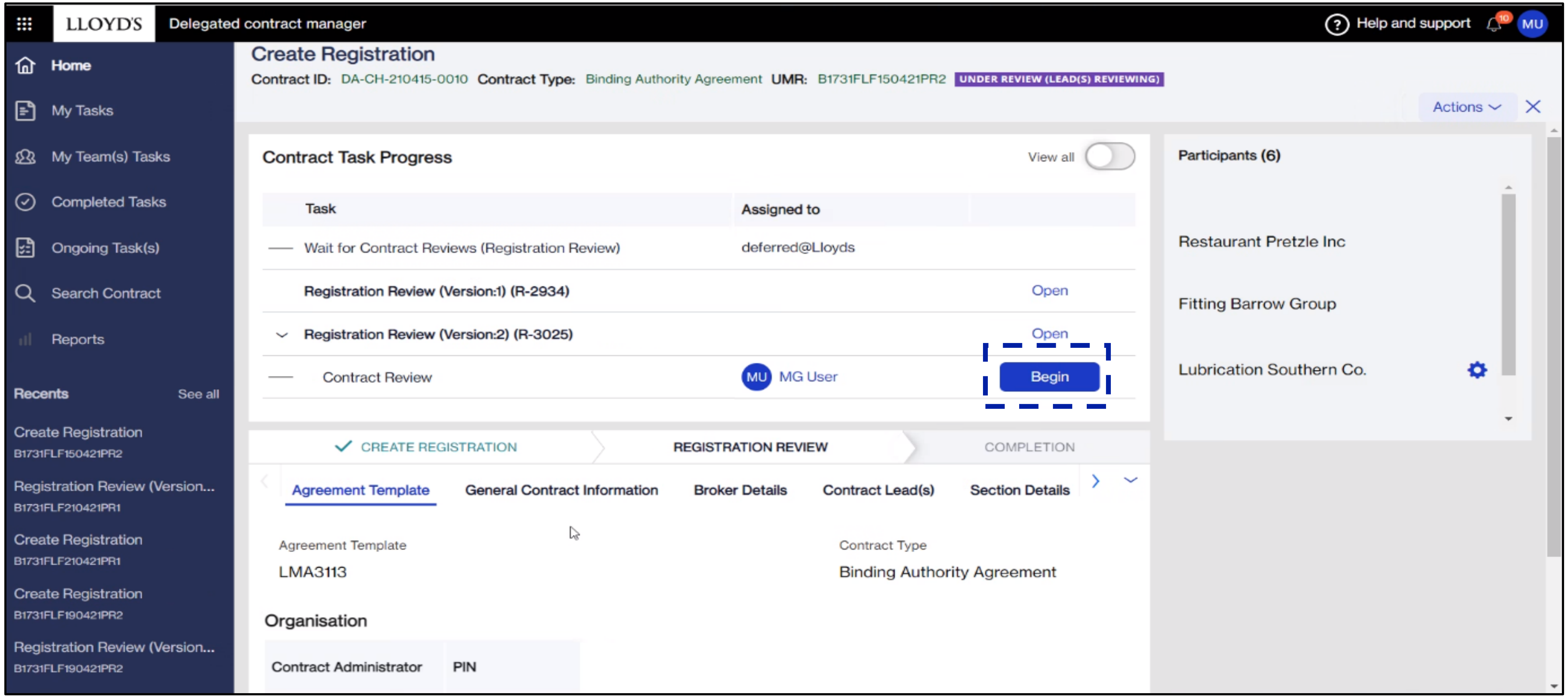
MA role in the system



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.

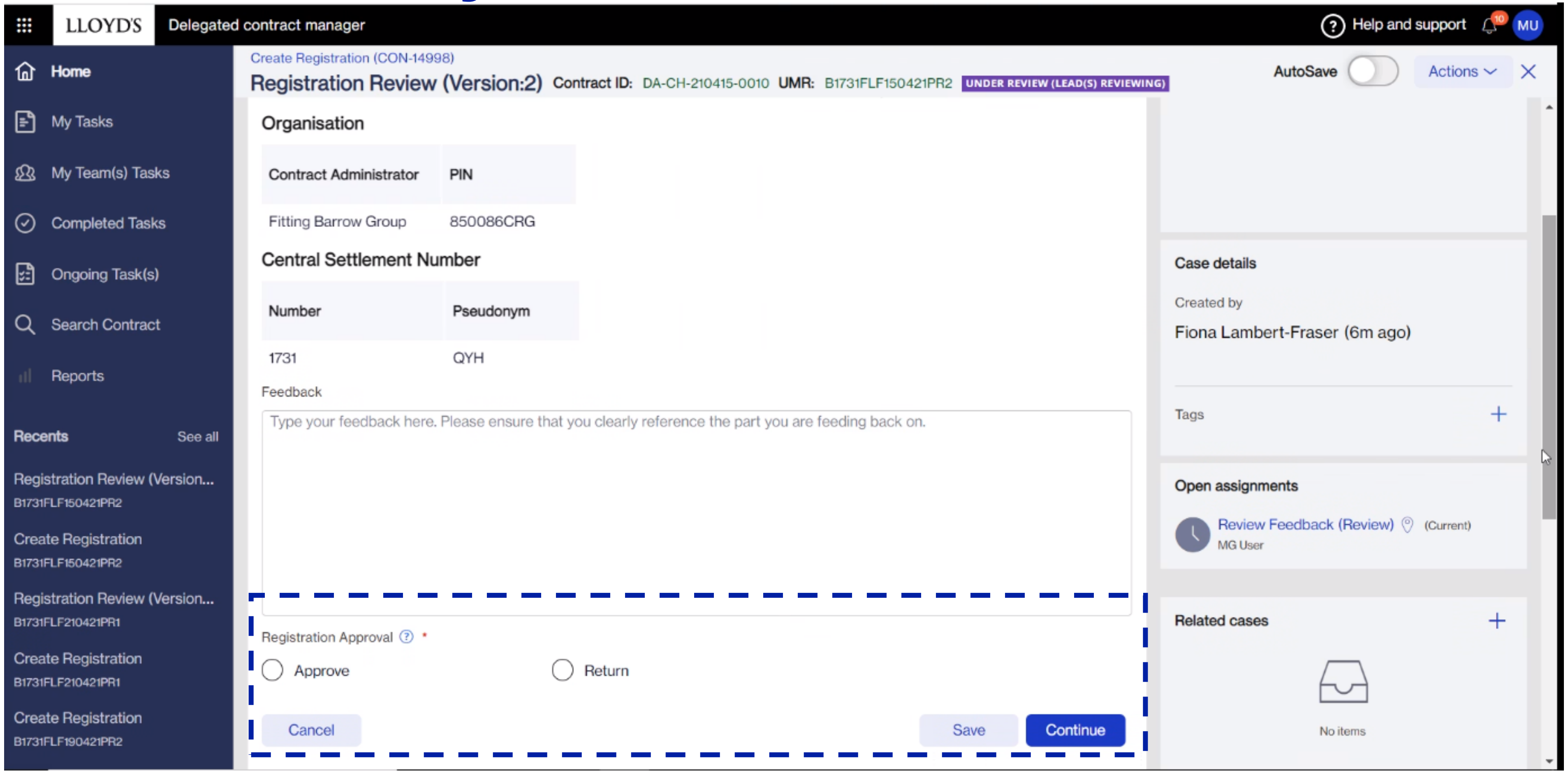
LLOYD'S

MA role in the system



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 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.

LLOYD'S

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)