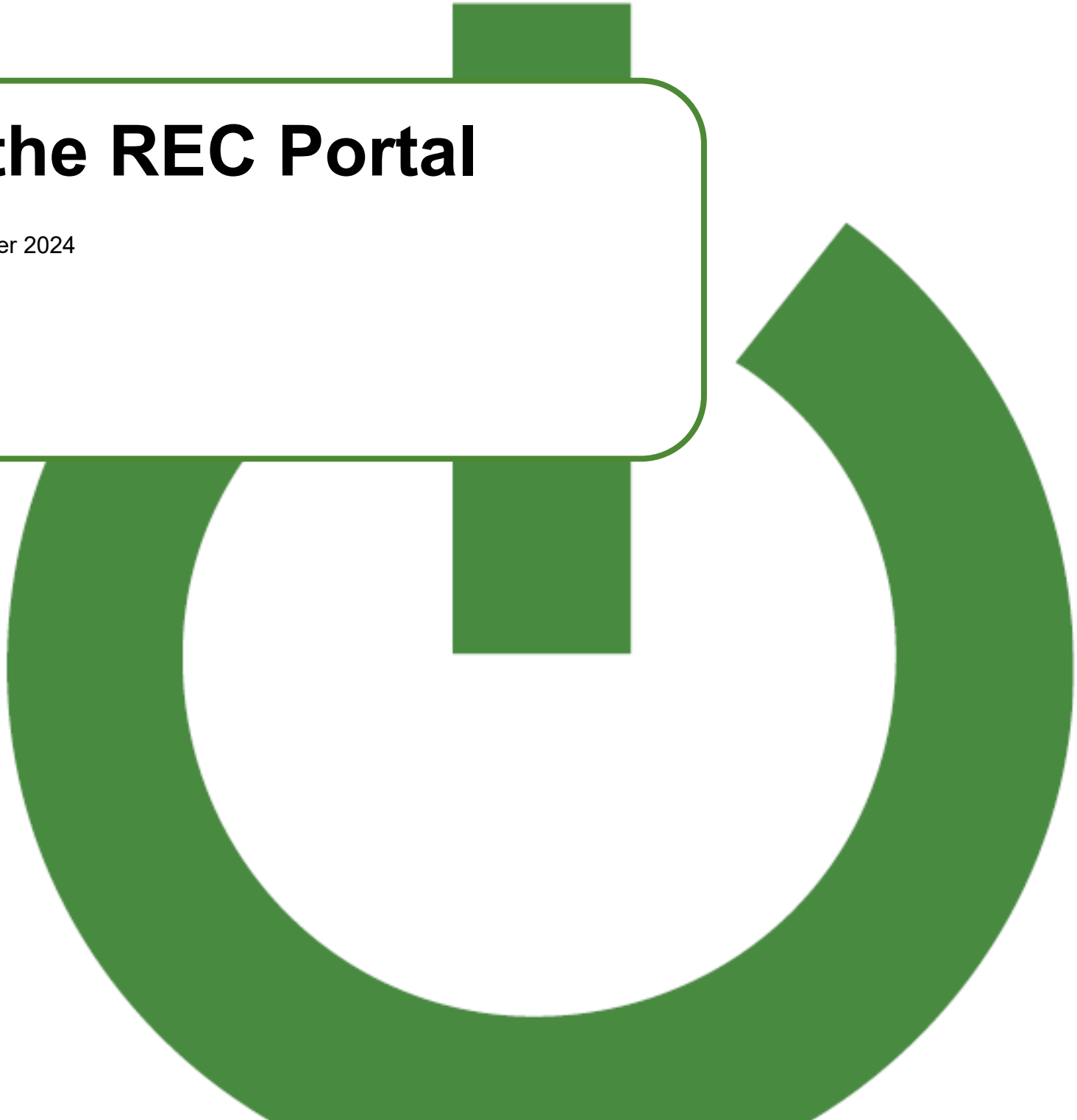
Navigating the REC Portal

A User Guide last updated in December 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 REC 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 Master Admin User (MAU) can set up your account and assign certain roles (Performance Assurance, Contract Manager, and MAU) to your new account.

Are you an MAU looking for more information about managing your users and organization? Take a look at our REC Portal MAU User Guide.

Visit the REC Portal to create your account today

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 public-facing information, plus:

- You can access the Organisation Management area
- You can make an Application to accede to the REC or REC Services
- You can start the process to Withdraw from the REC
- You can download the REC Party Register
- You can access information about REC Change Proposals and raise new Issues
- You can access Committee Workspaces
- You can raise Service Desk tickets
- You can access the Digital REC, Market Messages and ERIN
- You can set a profile picture and define your 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 your fellow 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 correct 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.

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. The buttons to the right take you to the right place in this document.



HOMEPAGE

REC NEWS AND EVENTS

REC DOCUMENTS

ORGANISATION MANAGEMENT

CHANGE MANAGEMENT

COMMITTEES

KNOWLEDGE CENTRE

SERVICE DESK

DATA SPECIFICATION, MARKET MESSAGES, PROCESS MAPS

Homepage

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-hand corner

Navigate the Portal

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

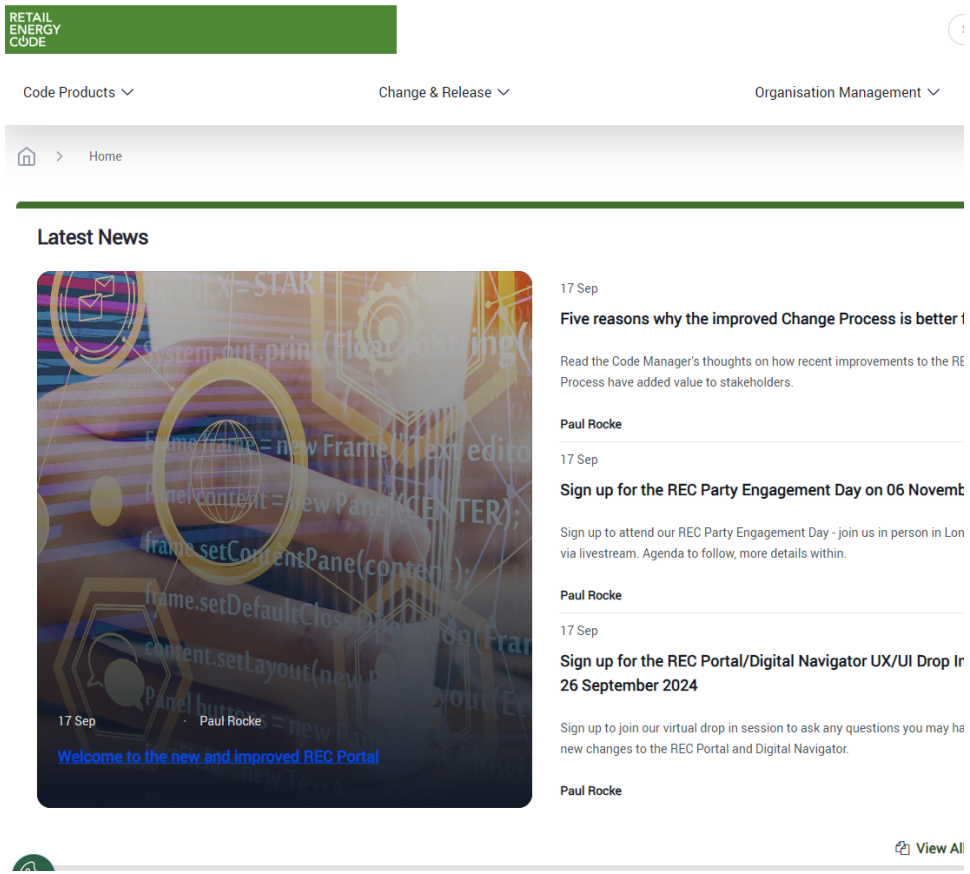
View important messages

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.

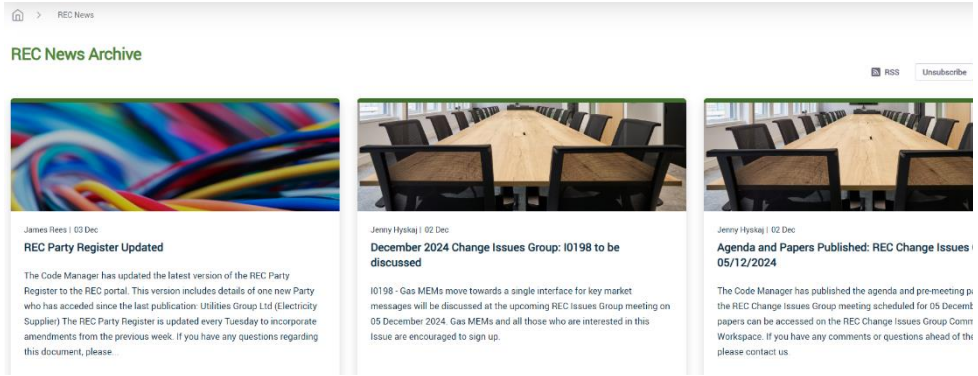
The Code Manager continues to review the homepage, improving the relevance of information held, personalisation of information, ease of navigation, and general user experience. We'll update this User Guide whenever we implement improvements.



REC News and Events

Latest News

Check out the most important stories in the REC straight from the Latest News hub on the Homepage. From there, you can also select to View All News Articles for a historical record of all posted stories and even opt to subscribe to receive emails every time a new story is posted (log in required to subscribe).



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 information about past events held by the Code Manager. You'll find this page through the Knowledge Centre menu item.

REC Podcasts

Navigate to our Podcast library to listen to the latest – and all previous – podcasts created by the Code Manager, on a host of relevant topic areas including Change Proposals, Performance Assurance, services and systems. Also found in the Knowledge Centre.

REC Bulletins

Every Friday, the Code Manager sends out two bulletins aggregating general news and Change related news to its email subscribers. On this page, you can access and download PDF versions of historic versions of the Bulletins. All in the Knowledge Centre.

It's easy to sign up to receive the bulletins by email!

Just let us know you want to be added to the distribution lists. Email enquiries@recmanager.co.uk today.

REC Documents

Find REC Documents in the Code Products menu area. These pages allow you to download, preview and share links to all REC Products, as well as access all Digital versions.

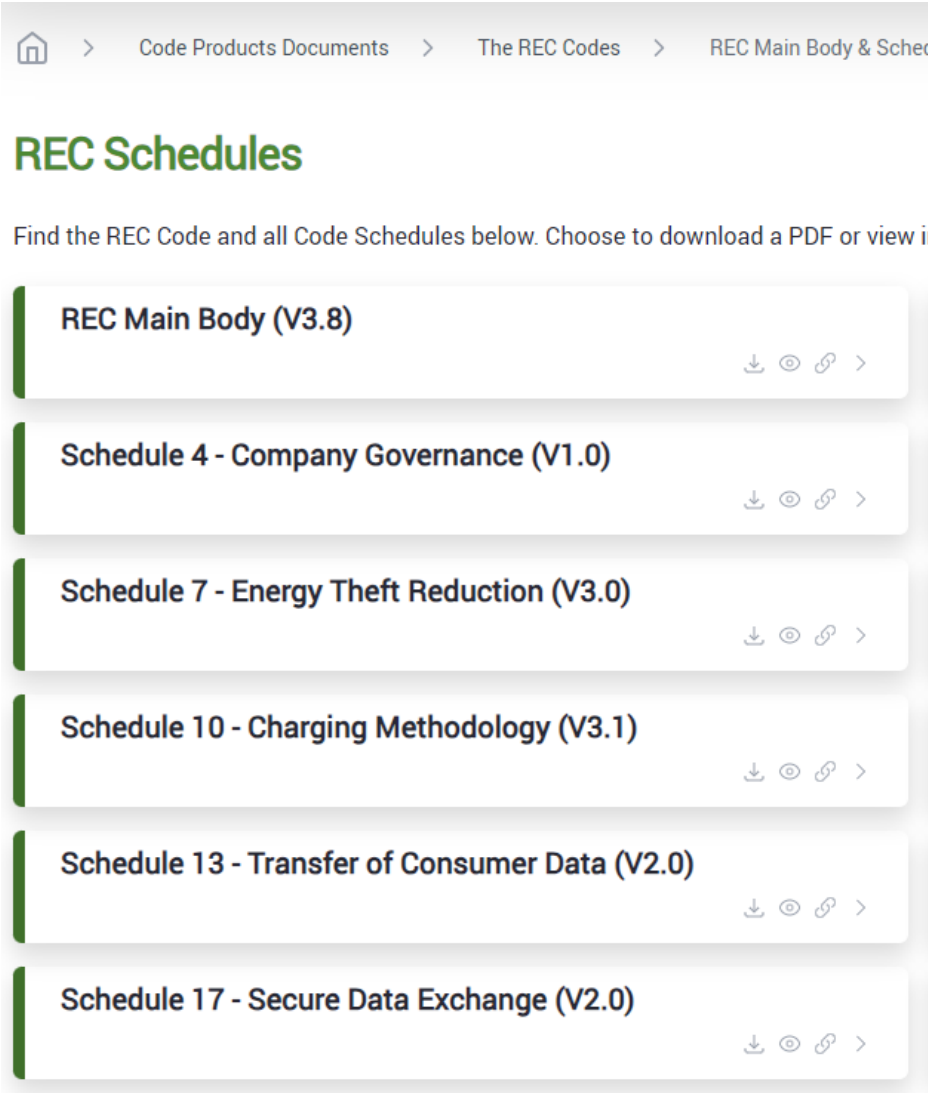
Access downloadable versions of the REC and its Schedules, User Guides, templates, and pertinent documentation.

User Guides (non-Category 3) hosts User Guides maintained by the Code Manager but are not listed on the REC Baseline Statement. These are held in the Knowledge Centre menu area.

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.



Organisation Management

From the Organisation Management menu item, you can manage a host of information relating to your company, providing you are assigned the correct permissions for your REC Party or Service User. You will be able to carry out functions including:

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 this button to start the process.

View Operational Contacts for every 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.

View Performance Assurance and Dashboards

Here, you'll find all your relevant performance assurance information, including details on: Performance Assurance Techniques, Performance Assurance Dashboards, Maintenance of Qualification processes, Performance Assurance forms and the ability to send and receive data with the Code Manager.

Change and Release

Follow this menu item to access everything related to the REC Change Process, including planned code releases.

Change Register provides a high-level view of all current and historic Change Proposals.

Impact Assessments and **Consultations** will allow you to see which Change Proposals are currently within each of these stages and open for you to provide comment. Click on the relevant Change Proposal to access all associated documentation. You can upload your Impact Assessment and Consultation responses to the Portal here.

The **Codes Roadmap** provides an evolution plan for the REC to allow for better planning.

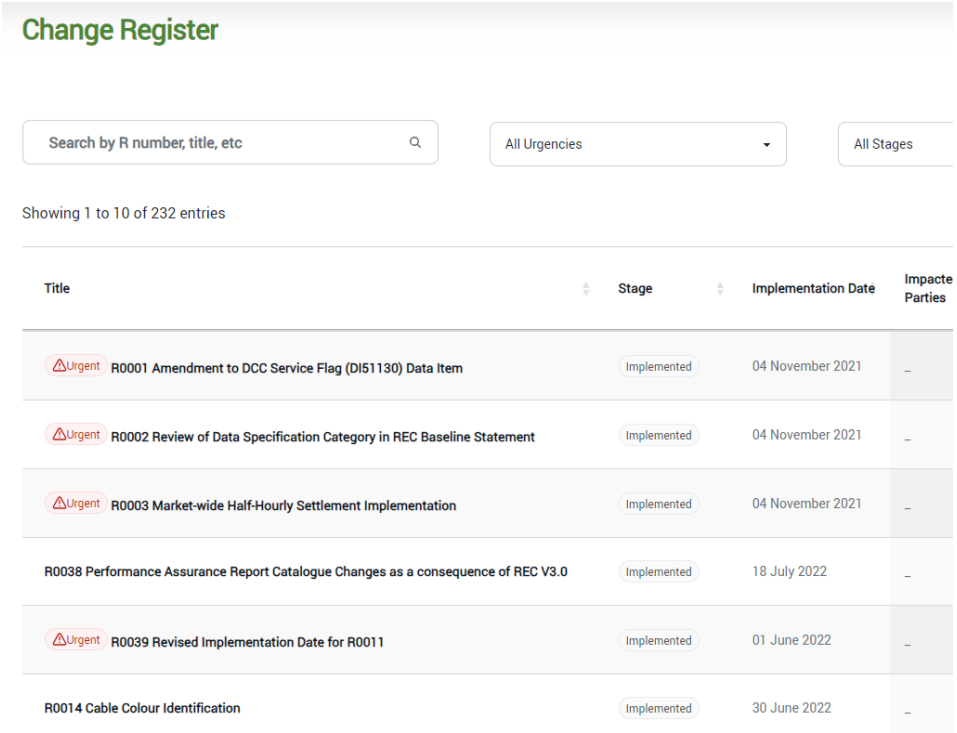
The **Prioritisation Matrix** is used to determine priority status for a Change Proposal, and includes guidance on the scoring system.

Select **Raise REC Issue or Change** to get the ball rolling on your own idea for a future change to the Code.

And choose **Code Releases** to see what Change Proposals are scheduled to be implemented and when they will be coming into force.

Click here to check out our Change and Release User Guide.

Access more detailed information on all aspects on the REC Change Process, including how you can best engage.



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.

Visit the Service Desk

Email us directly

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 here to check out our User Guide:

“Navigating the Committee Workspaces for Committee Members”



Data Specification, Market Messages and Process Maps

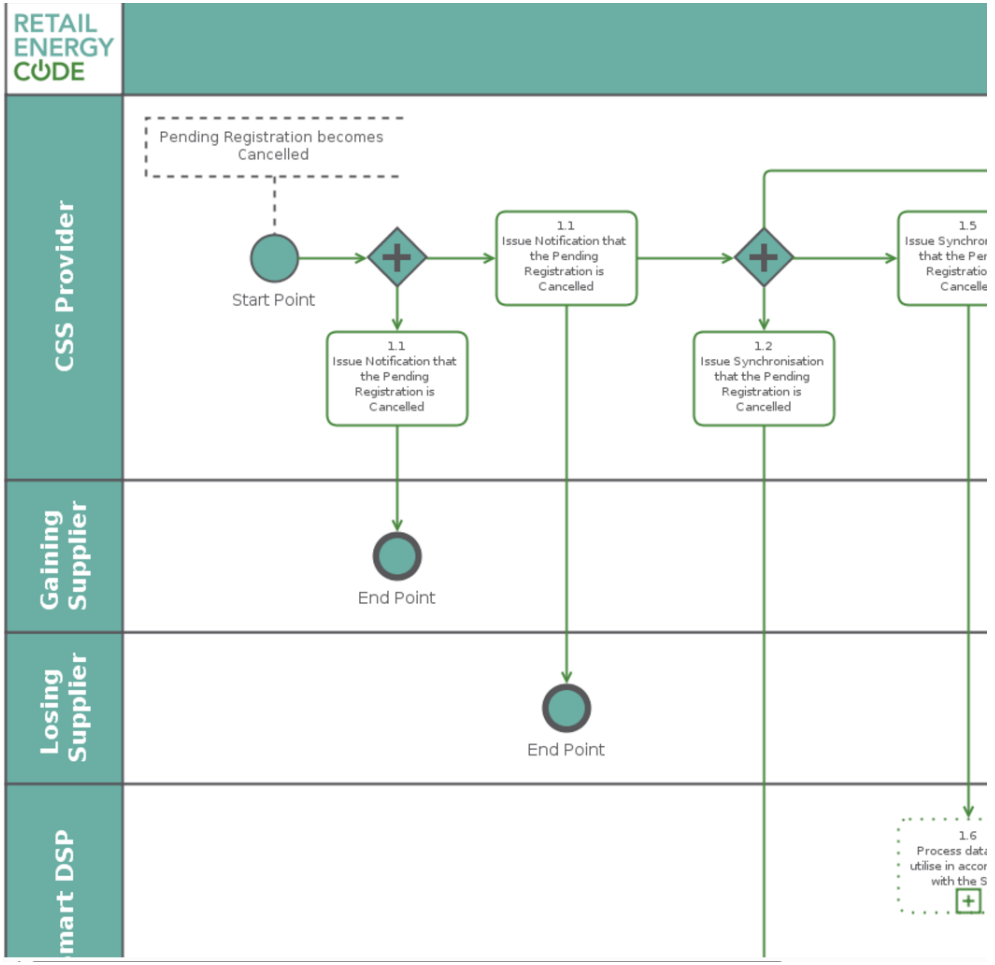
The Portal hosts a plethora of digital tools and products to support you navigating the REC and its products.

From the Code Products menu, choose **Market Messages** for a comprehensive view of the purpose and structure of all the data flows sent between market participants. Or choose **Data Items** to drill down further into the individual elements that make up a Market Message.

Choosing **Data Specification Catalogue** will allow you to download the REC Data Specification in the format the best suits your needs, as well as associated documentation through the **Data Specification Documents** option.

Are you a visual learner? Take a look at our **Process Maps** for a graphical representation of all of the key industry processes and their associated messages and responsible industry roles.

Find all of these and more by clicking the Code Products menu item in the main REC Portal menu.



Click this button for more dedicated information about these artefacts in this separate User Guide

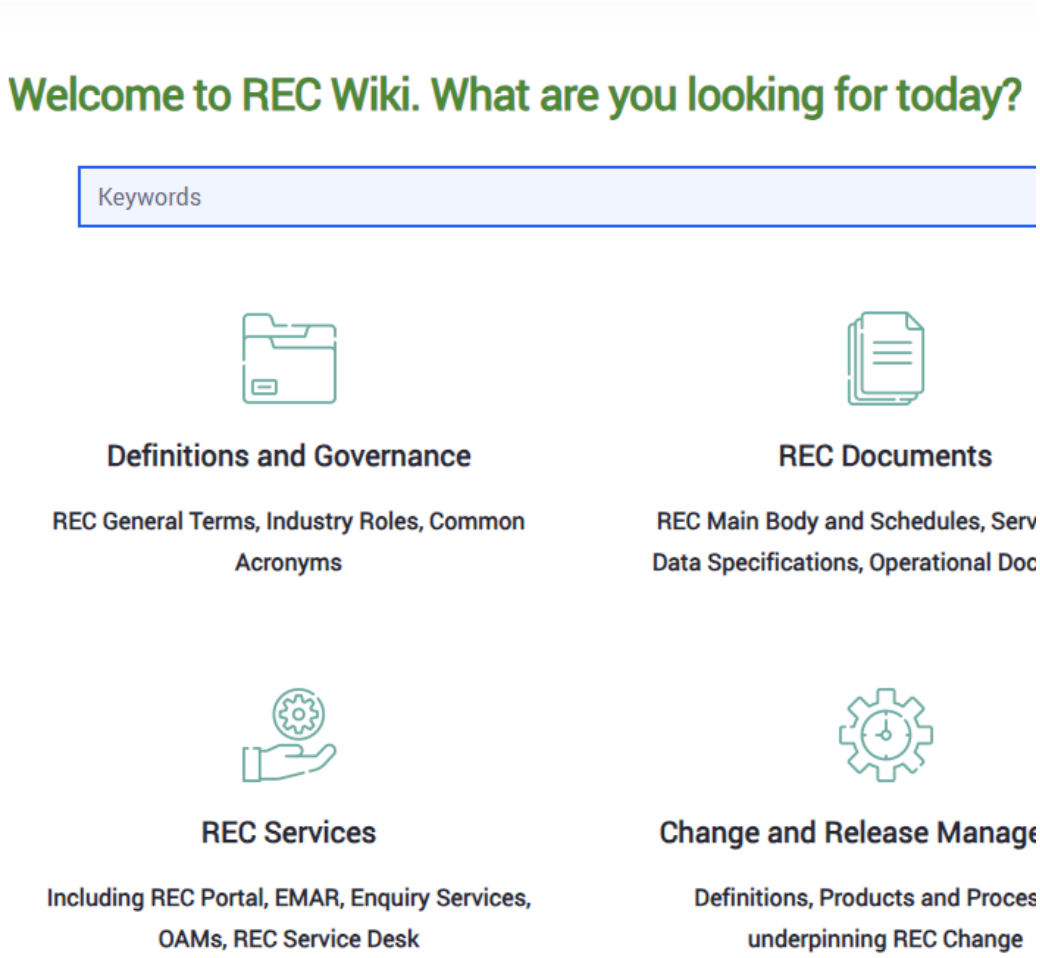
Knowledge Centre

As well as a host of information related to REC News and Events, our Knowledge Centre menu category is home to a huge amount of resources designed to make it as easy as possible for you to self-serve information.

Take some time to browse our **REC Wiki** – a collection of hundreds of articles about different processes, services, documents and more from within the REC and across the wider industry sphere. 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 a ticket into the Service Desk and we'll take a look.

Our various **hubs** – such as the **Consumer Hub**, **Metering Hub**, **Theft Hub** – bring together topic specific information from across the Portal into a central place, so if you are specifically looking for information related to metering arrangements, a quick trip to the Metering Hub should be just the ticket.

Although we want you to be able to self-serve information as much as possible, we're always happy to help you find what you're looking for too, so don't hesitate to raise a ticket or speak to us on the Live Chat.

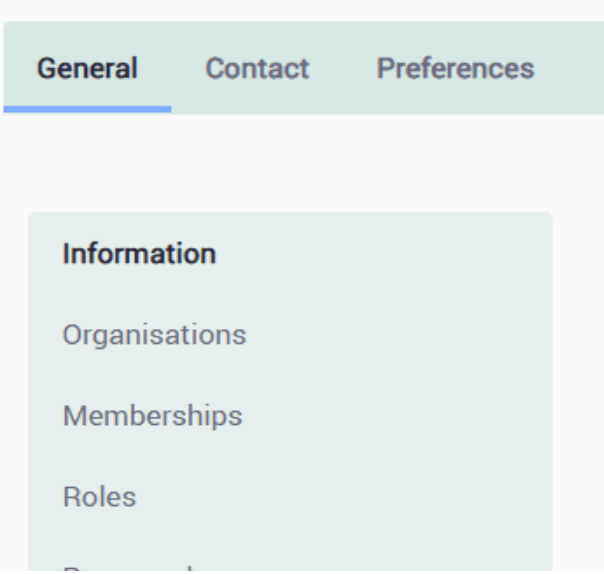


Account Settings

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 and related websites. 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 number 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.



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.



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.