

# New EMR Portal Update

June 2023

EMR Delivery Body

This webinar is recorded

# Housekeeping



Microphones on mute



Cameras off

Have a question?

Join at [Slido.com](https://www.slido.com)

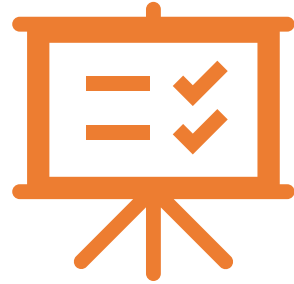
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## Purpose for Today's Session



Delivery Roadmap  
Overview



Live  
Demonstration



Regular Engagement  
Approach



Question & Answers

## Recap of the EMR Portal Project

### ESO Business Plan

- One of the key deliverables for the ESO originally expected to be delivered by April 2023.

### Challenges experienced

#### Externally

- Regulatory landscape uncertainty
- Process optimisation opportunity
- Stakeholder feedback

#### Internally

- Assumptions did not materialise
- Enhanced understanding of the complicity and difficulty
- Resources and ways of working

### Intensive stakeholder engagements to co-create the new plan

- Webinar on 1<sup>st</sup> Feb – strong preference from industry for **Go Live for 2024 CM**
- Series of workshops and meeting with customer groups and stakeholders
- Took customer and stakeholder's feedback into account in the development of the new plan



# Improved ways of working to ensure timely delivery



## Collaboration

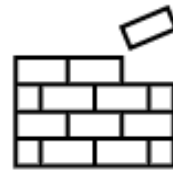
Strategic review of the re-plan with stakeholders and customers

Continued engagement to better understand potential changes



## Transparency

Regular update to keep the EMR customers and stakeholders up to date and track how we are doing



## Governance

Implemented new project governance process

Executive sponsor for the project



## Assurance

External consultants brought in to work on the re-plan for further validation and assurance

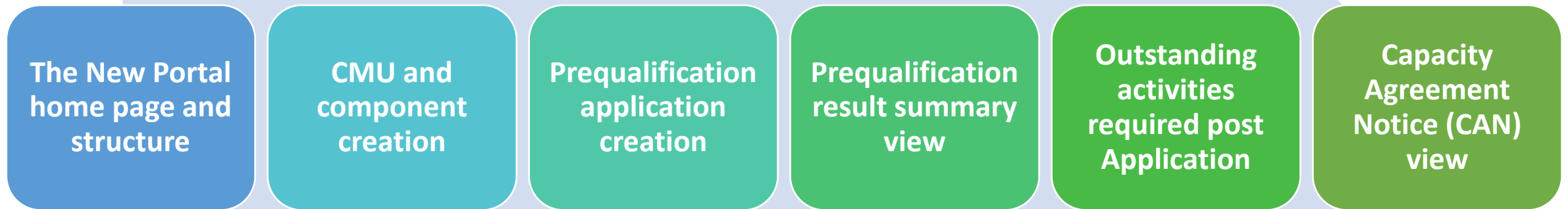


## Resource

Increased dedicated resources working on the project with improved ways of working

## Demonstration of New Portal Functionality

- We are excited to be able to present a short demonstration of the overall look and feel of some of the functionality that we have built so far in the project.
- We have worked with the dedicated New Portal user group to ensure that we build a system that resolves the pain points that you have described to us in operating with the existing portal.
- The system is still work in progress, therefore the demonstration does not represent the final product.



# Ongoing Customer Engagement Approach



- Continued engagement with the dedicated User Group
- Requirement playback, challenge review and familiarisation testing



- Dedicated webpage
- One stop shop for progress updates, guidance, videos & training materials



- Newsletters starting from June
- Provide regular update and transparency on the project progress



- Deliver series of webinars and customer events
- Attend customer group meetings



## Data Migration & Validation activities

As we move to the transformed new solution there are a number of data migration/data cleansing steps we need to make you aware of and may need your help as we work through these over the next few months:

For certain customers we will be contacting you to discuss:

- how you would like certain data migration to be managed in the new portal. An example multiple NGRID IDs associated to one Company Number is not allowed in the new portal.
- changes in your data setup that will be required as part of the data workstream and any impacts. An example £ symbol and decimal places.

Should you have any questions please contact Caroline Wright ([caroline.wright@nationalgrideso.com](mailto:caroline.wright@nationalgrideso.com)) or Anthony Shrimpton ([Anthony.Shrimpton@nationalgrideso.com](mailto:Anthony.Shrimpton@nationalgrideso.com))

# Questions & Answers

# Event Questions & Answers (1)

**Question:** Could you please re-explain the way multiple companies work in the portal? I'm thinking about how we would provide access for a third party to review a specific company and associated CMUs but not all our companies.

**Response:** We will be publishing details of company and user setup on our website as this element has been completed. This will explain the process in more detail.

You will be able to have multiple companies attached to the same user provided they are in the same group of companies in a similar way to the current company setup. Additional users can be added to see specific data or all of the information across a portfolio.

**Question:** Can you confirm that all historic data is going to be migrated over to the new portal, including all cloned/linked CMUs?

**Response:** We intend to move all data from the existing portal to the new portal dependent on validation as part of the data migration process.

There are improvements in data structures and validations in the new portal so some changes will be necessary and our Data Migration Team are working through these over the coming months.

**Question:** One other suggestion if its not there already would be a function to download all, or all selected, PDFs in one go for example the pre qualification results or CANs. This would be a big time saver.

At present it is not possible to download all prequalification results letters. We understand there is a desire for this feature and our development team are reviewing options on how best to deliver such functionality.

We cannot guarantee this will be available for the first prequalification release of the new portal, but it will be added to the overall backlog.

We have added a summary .csv download of all prequalification results which will be available during the first prequalification release.

## Event Questions & Answers (2)

Question: Will the portal show multiple deadlines for specific milestones if required? eg If a T-4 CMU hasn't provided FCM by 12 months after ARD, they're required to provide a credit cover increase within 15 wd.

Will the 'due date' in the new portal show the 12 month deadline as well as the final deadline to provide the documentation (if additional credit cover was provided) of 16 months after ARD?

Response: We are looking at different options for milestones that have multiple deadlines and intend to present these to the New Portal user group for feedback.

It is looking most likely that we will use the termination deadline for FCM and that the 11 and 12 month deadlines will continue to be processed via offline communication.

This is an area where the new system allows us significantly more flexibility and we will be looking to users to inform our continuous improvements as we work through the first set of milestone deadlines.

Question: at a previous meeting, DB said it would start frequent comms with industry on the progress of the Portal - when will that begin?

Response: The session today continues our commitment to regular communications on the New Portal.

We will shortly be publishing our first dedicated newsletter providing a summary of key project progress and are creating a dedicated New Portal website too.

Question: Will familiar features be returning under CMUs such as amend metering data, CMU Cloning and options to complete metering aggregation/tests at component level?

The high level features being developed can be seen on the development roadmap. We are taking this opportunity to make some process improvements and so not all features will have a like for like equivalent.

## Event Questions & Answers (3)

**Question:** What will be the user id for login purposes? or put it another way will it be possible to logon to two or more company accounts with the same e-mail address?

**Response:** The user id for the new portal will be your registered email address. It will be possible to assign multiple companies that have been registered within the same company group to an individual user, but not to have multiple separate company logins based with the same email address.

**Question:** Why can't we use the same email to log in?

**Response:** You can do this if the company sits in the same company group within the new portal, but if the companies are independent from each other, it will not be possible. This is because the email address is used as the basis for determining user credentials.

# Continuing the Conversation

**Feedback** on the New Portal and Delivery Roadmap:

Richard Griffiths [Richard.Griffiths@Nationalgrideso.com](mailto:Richard.Griffiths@Nationalgrideso.com)

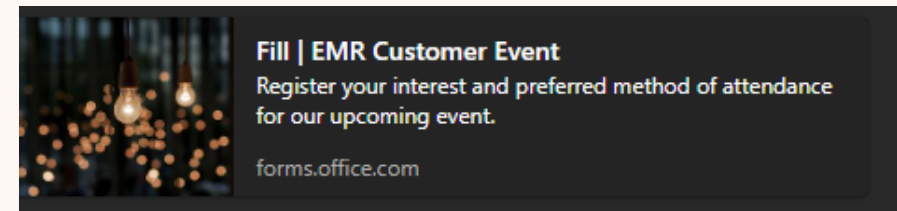
**Data migration queries**

Caroline Wright ([caroline.wright@nationalgrideso.com](mailto:caroline.wright@nationalgrideso.com)) or  
Anthony Shrimpton ([Anthony.Shrimpton@nationalgrideso.com](mailto:Anthony.Shrimpton@nationalgrideso.com))

Join the **New Portal User Group**

[box.NewEMR.ITteam@nationalgrid.com](mailto:box.NewEMR.ITteam@nationalgrid.com)

We are intending to run a **Customer Event** in **July** prior to the CM Prequalification Round opening



[Register your interest here](#)



Thank you