Customer Requirement Playback

EMR Portal – 26th January 2023
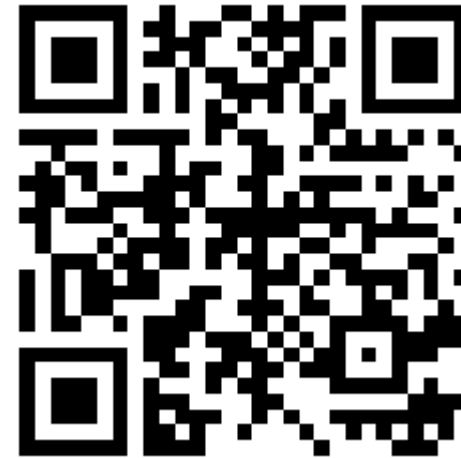
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Contents

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Slido Access

We will be using Slido for questions and feedback in today's session. Please go to sli.do and enter the event code **#206 2111.**

If you would like to ask any questions ahead of the session please either send them in by email or use this link to ask them on Slido, the event code will only work on 26/01/2022

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Outstanding Feedback

Date raised	Feature Area	Customer Comment	DB Response
20/10/2022	CMU Creation	Sometimes desired CMU ID's are already taken when a CMU is created. To avoid this can we have 10 character CMU IDs that include a 4 character company ID that identifies the company that created the CMU (this would not change in the event of a CMU transfer).	Following the survey on 15/12 and an internal cost analysis the Delivery Body believes the current CMU ID allocation setup is sufficient. Whilst the 10 digit CMU ID would be an improvement the development resource required is not proportional to the scale of the issues caused. We will not be implementing either 10 digit CMU IDs or CMU ID reserving in the first release of the new portal.
15/12/2022	CMU Transfer	Why does the transferor need to provide certificates? they should already be there anyway as they currently hold the agreement?	The Delivery Body has reviewed how company level Exhibits (A and C) are provided, the Delivery Body are committing to amending the proposal of uploading Exhibits A and C from a Application level to a Company level removing the requirement to upload multiple Exhibits during the CMU Transfer process. Please note this change will also amend the need to upload the Exhibits during Secondary Trading.

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Notifying DSR Components (Component Updates)

Feature Description

Before a DSR Test can take place, an Unproven DSR CMU must confirm its components, which need to be approved by the EMR Delivery Body (DB). As per CM Rule 8.3.3A, when confirming the components of a CMU, an Applicant must provide the address, postcode and Ordnance Survey grid reference. As part of confirmation of the components process, for the selected Unproven DSR CMU, the customer can amend any existing components, delete existing components or add new components up to the point a DSR Test has been requested.

Customer Feedback Considered

- Capacity Providers have highlighted that there is no ability to bulk upload components if a CMU has a high volume of Components.
- Delivery Body reject all Components even though one single Component might have an error.
- Portal times out before an Applicant saves or submits and loses information previously entered

High-level Requirements Proposed

- Following Prequalification Results Release a Post Assessment Request for Notifying DSR Components will be added to the Outstanding Activity List for the customer to complete.
- Check box will allow the user to select Component(s) for submission for EMR DB review. The ability to 'Select All' is also made available.
- A component(s) status will be released to the user once all components submitted for review in that group have been reviewed
- If one or more components are rejected within a group submission, then the overall status is shown as Rejected but Components which have been approved within that same group will be updated to an Active Status.
- A standard feature of the New Portal is an auto save / pop-up reminder every 30 minutes.

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Capacity Agreement Notices

Feature Description

> Under CM Rule 6.2 the Delivery Body is obligated to issue Capacity Agreement Notices (CANs) for the convenience of Capacity Providers. These CANs are kept up to date throughout the duration of an agreement and contain the information prescribed in Schedule 1 as well as details of the daily capacity obligation and any secondary trades.

Customer Feedback Considered

- Historically email notifications were not consolidated so a simple administrative change could lead to a large number of email notifications
- Multi-component CANs can be very large
- Difficult to see what has changed when CANs are re-issued

High-level Requirements Proposed

- CAN documents will continue to be issued as .pdf files
- For DSR CMUs with any number of components and non-DSR CMUs with 10 or more components the CAN will include an appendix spreadsheet to cover component level details, these will not be listed on the CAN itself.
- CAN notifications will be aggregated so that any company updates only trigger a single regeneration
- Adding more information to the CAN history field (viii) with the ability to view a table of the CAN history
- Improvements to the internal CAN release process

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Overview Stats on TOP of page

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Download all Displayed:

My EMR	User Management	Company Management	CMU's & Components

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CAN-20XX-CMUXXX-XXX / Historical CAN

Date Modified	Download CAN letter	Download Appendix	Version	Comment
DD/MM/YYYY	📄	📊	v1.0	Admin name change
DD/MM/YYYY	📄	📊	v2.0	Address Changes
DD/MM/YYYY	📄	📊	v3.0	AACO change

End of scroll   <XX> Displayed: Load <X> More | Jump to top

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Email notifications and user types

We intend to continue to use email notifications alongside other tools like Outstanding Activities. In the long term we are looking for the ability for users to opt into email notifications, both generally and at a process by process level regardless of role but this will not be available for the first release.

Until this feature is available we are looking to establish a consistent approach to email notifications. We do not feel sending notifications to just Main Admins is appropriate as it creates a reliance on a single individual. With this in mind there are three options:
1. Main and Deputy Admins
2. Main and Deputy Admins and read and write users
3. Main and Deputy Admins and all users

Do you think a different approach is warranted for different notifications (for example Termination Notices vs milestone submission updates)?

As a reminder the user types in the new portal are:
- Main Admin
    - Only one per account. Can view and edit all details as well as managing other users and creating new CMUs or companies
- Deputy Admin
    - At least one per account (once you have 2 or more users). Can also view and edit all details as well as managing other users and creating new CMUs or companies
    - Can 'promote' themselves to Main Admin
- Read and Write User
    - Can view and edit all details but cannot manage other users or create new CMUs or companies
- Read Only User
    - Can view all company details but cannot make changes or submit documents or applications

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Delivery Body Notices (Secure Messaging & Other Documents)

Feature Description

> Secure Messaging in the current EMR Delivery Body Portal is used to comply with Capacity Market Rule 1.6 Notices whereby the Delivery Body can issue communication regarding updates relating to your CMU and Agreements.

Customer Feedback Considered

- Capacity Providers have highlighted that they don't know what the message relates to in the current EMR DB Portal functionality
- Ensure the messages sent are meaningful
- Will facilitate the Other Documents element of existing Portal with greater control and with a reduced need due to dedicated submission areas defined in the V2 Portal

High-level Requirements Proposed

- We have chosen to align this feature to the Capacity Market Rules and have renamed Secure Messaging to Delivery Body Notices
- The Delivery Body Notices will be split into two different elements:
    - **Delivery Body Notifications** - A Delivery Body to Capacity Provider formal Notification as required by the Capacity Market Rules
    - **Secure Share -** A Capacity Provider to Delivery Body share element to enable submission of documents that do not sit elsewhere in the Portal
- The Notices will be at CMU level as opposed to Company level in the existing Portal

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🔒 https://www.nationalgrideso.com/emrdeliverybodyportal/My_EMR ☆

My EMR | User Management | Company Management | CMU's & Components

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Delivery Body

My EMR

CMU and Auction Management

Company CMUs

A complete list of all company CMU's that can be something something something.

Exhibit Library

All the Exhibits we require you to provide categorised by each CMU type.

Outstanding Activities

Submit required Information and or Documentation Post PQRD.

My Applications & Opt-Out Notifications

Edit and update all your Auction applications related to this company.

Application Results

Body copy to be placed in here. Body copy to be placed in here. Body copy to be placed in here.

Delivery Body Notices

Body copy to be placed in here. Body copy to be placed in here. Body copy to be placed in here.

Available Auctions

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	Apply
[Title]	T-4	2027	Apply

CMU Auction Status

Awaiting information.

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My EMR / Delivery Body Notices

Secure Share

Filter Message Type

- Display All -

Filter Company

- Display All -

Date	Sender	Message Type		Doc Status	Doc Reviewed	Action
XX/XX/XXXX	Name Surname	Announcement		Pending	XX/XX/XXXX	View

Message ID XXXXXXXX

[Company Name]   **[CMU ID]**

● Pending   XX/XX/XXXX

Message subject: Lorem ipsum dolor sit amet, consectetur adipiscing elit.

Sit nulla est ex deserunt exercitation anim occaecat. Nostrud ullamco deserunt aute id consequat veniam incididunt duis in sint irure nisi. Mollit officia cillum Lorem ullamco minim nostrud elit officia tempor esse quis. Cillum sunt ad dolore quis aute consequat ipsum magna exercitation reprehenderit magna. Tempor cupidatat consequat elit dolor adipisicing.

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My EMR / Delivery Body Notices

Secure Share

Filter Message Type
- Display All -

Filter Company
- Display All -

ID or Message ID 🔍

Date ⌄	Message Type ↓ ⌄			Doc Status ⌄	Action	More
XX/XX/XXXX	Announcement	XX		🔵 Pending	View	⋮

Message ID XXXXXXXX

[Company Name]   **[CMU ID]**

🔵 Pending

Date   XX/XX/XXXX

Sender   Name Surname

Message Type   Announcement

Subject   Lorem ipsum dolor sit amet, consectetur
                                     adipiscing elit

Last Viewed   XX/XX/XXXX

Document Reviewed XX/XX/XXXX

Close

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Delivery Body

My EMR / Delivery Body Notices / Secure Share

Cancel   **Create Secure Share**

Filter Company

- Display All - ▼

Filter CMU Type

- Display All - ▼

Search CMU ID or Name 🔍

Select	CMU ID ↓	CMU Name ↓	CMU Type ↓	Company Name ↓
☑	AB73WV	Preston North Upgraded Power Station	Lorem ipsum dolor sit amet, consectetur	Company Name long long name
☐	123456	Preston North Upgraded Power Station	Lorem ipsum dolor sit amet, consectetur	Company Name long long name
☐	123456	Preston North Upgraded Power Station	Lorem ipsum dolor sit amet, consectetur	Company Name long long name
☐	123456	Preston North Upgraded Power Station	Lorem ipsum dolor sit amet, consectetur	Company Name long long name

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My EMR **User Management** **Company Management** **CMU's & Components**

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Delivery Body

My EMR / Delivery Body Notices / CMU Selection

AB73WV
Refurbishing Interconnector

Applicant Company
Company Name long long name

Cancel Submit

Select Applications → Upload Documents

Select Applications
Please select the Applications this CMU refers to from the list below.

☐ Select all   Search Application ID or CAN ID 🔍

☐ T-3-2026-123456-0001

☐ T-3-2026-123456-0001

☐ T-3-2026-123456-0001

☐ T-3-2026-123456-0001

☐ T-3-2026-123456-0001

☐ T-3-2026-123456-0001

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My EMR / Delivery Body Notices / CMU Selection

AB73WV   **Applicant Company**   Cancel   **Submit**
Refurbishing Interconnector   Company Name long long name

Select Applications   **Upload Documents**

Upload Documents
You have to upload at least one document to be able to finalise the process.

Document type

Choose an option ▼

The following filetypes are accepted: .JPG, .PDF, .PNG. max 2Gb

⬆ Upload Document   or Drop Files

Successfully uploaded
[file name.PDF]   View   Delete

Successfully uploaded
[file name.PDF]   View   Delete

Supporting comments

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

https://www.nationalgrideso.com/emrdeliverybodyportal/My_EMR

My EMR   **User Management**   Com

You have successfully submitted a Secure Share for CMU AB73WV ✕

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My EMR / Delivery Body Notices / Secure Share

Cancel   Create Secure Share

Filter Company

- Display All -

Filter CMU Type

- Display All -

Search CMU ID or Name

Select	CMU ID ↓	CMU Name ↓	CMU Type ↓	Company Name ↓
☐	AB73WV	Preston North Upgraded Power Station	Lorem ipsum dolor sit amet, consectetur	Company Name long long name
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My EMR / Delivery Body Notices

Secure Share

Filter Message Type

Filter Company

- Display All -

- Display All -

Search CMU ID or Message ID

Date ⌄	Message Type ↓ ⌄	Message ID ⌄	Company Name ↓ ⌄	CMU ID ⌄	Subject ⌄	Document Status ⌄	Actions
XX/XX/XXXX	Announcement	XXXXXXXXX	Company Name Spread over two lines	123456	Lorem ipsum dolor sit amet, consect..	● Pending	⋮

View message

More info

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Slido Q&A

Please go to sli.do and enter the event code

#206 2111

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In addition to feedback received today, we are keen to hear from you with any additional feedback via Email box.newemr.itteam@nationalgrid.com

If you have any further views on the feature areas explored please contact me at
Richard.Griffiths@Nationalgrideso.com

We are happy to continue to engage with you further on the topics we discussed today and look forward to demonstrating the delivery of the requirements in the New Portal in future sessions.

EMR Portal review webinar 1st February.

The next User Group sessions

- Requirement Validations on 2nd March
- Familiarisation is targeted for 9th March

Continuing the Conversation

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Appendix - Requirement process

- The steps below summarise the overall requirement validation, confirmation and familiarisation process used.
- Requirement playback sessions consider requirements currently sitting in Stage 1 of the process.
- Our intent is to use Playback to support the initial requirements definition prior to them being passed to our development team/project backlog.

1. Requirement definition

2. Confirm requirement/ backlog

3. Show & tell/ Demonstration and capture feedback

4. Sandbox/ Testing

5. Implementation/ Customer readiness

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Appendix - Reminder of Context

Requirement playback sessions will summarise proposed "Features" and what we intend to deliver prior to each development phase.

We have already used your feedback in setting requirements. There will be more opportunity for further feedback and familiarisation in future.

Your feedback will be incorporated where possible now or logged for future enhancements on our development backlog

We have created basic "mock-ups" to help visualise how the New Portal might deliver your needs.
System demonstrations post development will present the actual system functionality.

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