

# Customer Requirement Playback & Familiarisation

EMR DB New Portal – 14<sup>th</sup> December 2023

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- Disputes Result Release
- CMU Cloning

**Continuing the Conversation**

## Slido Access

We will be using Slido for questions and feedback in today's session. Please go to [sli.do](https://sli.do) and enter the event code **#1288536**

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 14/12/2023



Date raised	Feature Area	Customer Comment	DB Response
06/07/2023	Capacity Market Register	<p>Feedback received via Sli-do survey and/or via wider customer feedback:</p> <ol style="list-style-type: none"> <li>1) Keen to see CMU ID and Applicant details at Component level to enable better filtering and analysis of the Capacity Market Register</li> <li>2) Interest in Delivery Year register alongside the main registers for easier visibility</li> <li>3) Interest in accessing register data via API or relational database format as well as CSV/XLS</li> <li>4) Separate the post code &amp; Ordnance Survey Grid reference fields/columns</li> <li>5) Improve how we communicate changes to the structure of CMR</li> <li>6) Create a Data Dictionary to add use of CMR and how to interpret the information</li> </ol>	<p><b>Update 14<sup>th</sup> December 2023</b></p> <ol style="list-style-type: none"> <li>1) We have added the CMU ID and Applicant Name data items at Component Level which will make it easier for reporting purposes and to filter relevant information. We expect this to be ready for the full Capacity Market functionality go-live in May 2024.</li> <li>2) Due to technical challenges with retrieving information through from different Auctions into one Register we are unable to implement for the full Capacity Market functionality go-live but will continue to explore this improvement.</li> <li>3) We are unable to progress with a CSV extract for the full Capacity Market functionality go-live due to technical challenges, but will continue to explore future options to enable an Application Programming Interface (API) as an improvement post go-live of the New Portal.</li> <li>4) We are committed to separating the location, description and OS grid reference from a singular column in the current Register and moving them into their own columns. We also expect this to be ready for the full Capacity Market functionality go-live in May 2024. We will investigate visibility of creating and publishing as part of our overall guidance.</li> <li>5) We have already taken action to improve communication this year and we will continue to do this.</li> <li>6) A Data dictionary will also be made available for full Capacity Market functionality go-live providing a short summary of what data is held in each column.</li> </ol>

# Outstanding Feedback

Sli.do #1288536

Date raised	Feature Area	Customer Comment	DB Response
09/11/2023	Digital Signature	<p>Feedback received New Portal Familiarisation session:</p> <ol style="list-style-type: none"><li data-bbox="649 386 1391 601">1) A drop down list pulled from Companies House of the active Directors, as a guide for who should be sent the Exhibits would be helpful and is part of the current offline Exhibit generator.</li><li data-bbox="649 651 1391 779">2) Feedback raising concern that the SMS two-step authentication will be difficult to manage with their Companies/Directors.</li></ol>	<p>We are working with our technical team and developers to confirm what can be considered. We will be able to look further into the options once the final few features have finished development.</p>



# Bulk Upload

## Feature Description

The EMR DB provides customers a process to upload component level information for multiple components, to prevent the need to manually create and enter the information for each individual component in the portal.

## Customer Feedback Considered

- Customers need a way to be able to enter lots of information without the portal timing them out
- One template for all CMU Types means the errors and warnings cannot be specific to the type of component being uploaded
- No notification of the upload/creation being complete

## High-level Requirements Proposed

- Due to the nature of CMUs in the New Portal, with only a few questions and requiring a document upload, we are not proposing a CMU Bulk Upload
- Bulk Upload will include component creation for each CMU Type and the Notify DSR Component process for Unproven DSR
- Separate template for each CMU Type Component to ensure the validation is specific to the requirements
- Template download will be an .xls file to ensure usability, but upload must be in .csv format
- Mandatory questions will have validation in the template and on upload, to ensure mandatory fields are being completed and completed correctly
- A notification email will be sent to the initiator of the upload, confirming that the process is complete and the results can be viewed

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.



**Management Activities**

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



**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.



**Delivery Body Notices**

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



**Capacity Agreement Notices (CANs)**

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

Prequalification Auctions

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>

Secondary Trade Entrant

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>



My EMR / Management Activities

[← Back to Homepage](#)

Section name 1

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**Bulk Upload**

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**Security Interest**

Lorem ipsum dolor sit amet, consectetur adipiscing elit.



**CMU Transfer**

Lorem ipsum dolor sit amet, consectetur adipiscing elit.



**ERMC**

Emissions Related Material Change











## My EMR / Management Activities / Bulk Upload

[Download Template](#)[New Upload](#)

Filter Entity Type

Filter CMU Type

Filter Status

Name↑	Entity Type↑	CMU Type↑	Status↑	Uploaded Date↑	Uploaded By↑	Uploaded File	Error File
BU-1234	Component	New Build Generating	Processed - Success with Warning	DD/MM/YYYY	XXXXX XXXXXX		
BU-1235	Notify DSR Component	Unproven DSR	Processed - Partial Success with Errors	DD/MM/YYYY	XXXXX XXXXXX		
BU-1236	Component	New Build Interconnector	Processed - Success	DD/MM/YYYY	XXXXX XXXXXX		
BU-1237	Component	Proven DSR	Processed - All Errors	DD/MM/YYYY	XXXXX XXXXXX		
BU-1238	Component	Proven DSR	Submitted	DD/MM/YYYY	XXXXX XXXXXX		

1 - 5 of 18 items

Page 1 of 4



My EMR / Management Activities / Bulk Upload/ Download Template

[Cancel](#)

**Bulk Upload**

**Select Type**

Please select the type to upload

Component

**Select CMU Type**

Please select the CMU Type

New Build Generating

**Template Details**

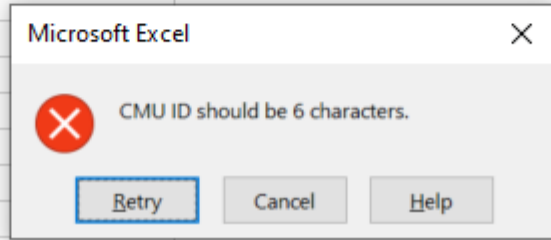
Download the template below. Complete the template as per the instructions.

You must save the completed file as Comma Separated Values (CSV) file using 'Save As' option before upload

Download Template



	A	B	C
1	Select the operation for each row Add - Creates a new component Update - Updates existing component Delete - Deletes the component Note: No changes can be made once the application is submitted	Enter your CMU ID here. Make sure it is created in the portal before using it. CMU ID should be 6 characters long alphanumeric value and must be unique	Enter your unique six-digit Component ID. If you have a Balancing Services ID, enter the unique alphanumeric identifier here, maximum 18 characters long.
2	Action	CMU ID	Component Identifier
3	Operation__c	CMU_ID__c	EMR_Component_ID__c
4	Add	CMU1234	TEST COMP
5			
6			
7			
8			
9			
10			
11			











D	E	F	
Refer to Schedule 3: Generating Technology Classes in the CM Rules to determine the appropriate technology class for your component. This is used to reference the de-rating factor for the component of the CMU and to calculate the de-rated capacity of the CMU.	Please select the relevant Fuel for this component	By selecting Yes the Applicant declares this is a Fossil Fuel component	On Cor 'Ye Cor of t Pos
Generating Technology Class	Primary Fuel	Fossil Fuel Component Declaration	Cor
EMR_Generating_Technology_Class__c	EMR_Primary_Fuel__c	EMR_Fossil_Fuel_Component_Declaration__c	EMI__c
Storage (Duration 1h)	Storage - Battery		
	Yes		
	No		
	May Have		

My EMR   User Management   Company Management   CMU's & Components

My EMR / Management Activities / Bulk Upload

Download Template   **New Upload**

Filter Entity Type: - Display All -   Filter CMU Type: - Display All -   Filter Status: - Display All -

Name↑	Entity Type↑	CMU Type↑	Status↑	Uploaded Date↑	Uploaded By↑	Uploaded File	Error File
BU-1234	Component	New Build Generating	Processed - Success with Warning	DD/MM/YYYY	XXXXX XXXXXX		
BU-1235	Notify DSR Component	Unproven DSR	Processed - Partial Success with Errors	DD/MM/YYYY	XXXXX XXXXXX		
BU-1236	Component	New Build Interconnector	Processed - Success	DD/MM/YYYY	XXXXX XXXXXX		
BU-1237	Component	Proven DSR	Processed - All Errors	DD/MM/YYYY	XXXXX XXXXXX		
BU-1238	Component	Proven DSR	Submitted	DD/MM/YYYY	XXXXX XXXXXX		

1 - 5 of 18 items

Page 1 of 4   ←   →

Cancel

Next

**Bulk Upload**

**Select Entity Type**

Please select the entity type to upload

Component ▾

**Select CMU Type**

Please select the CMU Type

New Build Generating ▾

[Back](#)[Submit](#)

### Bulk Upload

#### Upload File

Upload the completed file. Ensure completed templates is saved as CSV file before uploading the file.

You will also receive an email when the file is processed. You can also monitor the status of submission from the Bulk upload listing.

If there are any errors in file processing, error file will be available for download.

The following filetypes are accepted: .CSV

[⚡ Upload Files](#) or Drop Files



My EMR / Management Activities / Upload File for BU-XXXX

[Back](#)

[Submit](#)

**Bulk Upload**

**Warning**

Please note once the the upload is confirmed it cannot be stopped.

Do you wish to continue?

[Cancel](#) [Confirm Upload](#)

**Upload File**

Upload the cor...  
You will also re...  
if there are any...

The following f...

[+ Upload F...](#)

Successfully uploa...  
[file name.csv] [View](#) [Delete](#)

My EMR / Management Activities / Bulk Upload

Download Template

New Upload

✔ Your request is received and is being processed. You will receive an email when file is processed ✕

Filter Entity Type

Filter CM

- Display All -

- Display All -

- Display All -

Name	Entity Type	CMU Type	Status	Uploaded Date	Uploaded By	Uploaded File	Error File
BU-1234	Component	New Build Generating	Processed - Success with Warning	DD/MM/YYYY	XXXXXX XXXXXXXX		
BU-1235	Notify DSR Component	Unproven DSR	Processed - Partial Success with Errors	DD/MM/YYYY	XXXXXX XXXXXXXX		
BU-1236	Component	New Build Interconnector	Processed - Success	DD/MM/YYYY	XXXXXX XXXXXXXX		
BU-1237	Component	New Build Generating	Submitted	DD/MM/YYYY	XXXXXX XXXXXXXX		

1 - 4 of 15 items

Page 1 of 4



My EMR   User Management   Company Management   CMU's & Components   Disputes   nationalgridESO   Electricity Market Reform Delivery Body

My EMR / Management Activities / Upload File for BU-XXXX

Cancel   Submit

**Bulk Upload**

**Upload File**

Upload the co  
You will also r  
If there are an

The following

⚡ Upload

**Error - Unable to upload**

There are some inconsistencies in the uploaded file. Please ensure the template has not been modified and that the file being uploaded is consistent with the Entity Type and CMU Type selected.

The file upload will be cancelled, please review the file and upload again.

Close

from the Bulk upload listing.

# Integrated Guidance

## Feature Description

New location and structure for a complete suite of Guidance and Training Videos to assist customers with their participation in the Capacity Market  
There will be direct links from the new portal to this Guidance Location

## Customer Feedback Considered

- Current Guidance location requires navigating down through several layers in the website
- Auction Guidance documents held in different section to the rest of the Guidance
- Only high level grouping of the guides

## High-level Requirements Proposed

- New external location for all guidance and associated instructional videos
- Instructional Videos all follow a well-structured format
- Guidance is grouped and sub-grouped to aid quicker location of supporting documents & videos
- There are direct links from the new portal to the guidance landing page or the associated topic tile
- There is a search facility to help look for a particular topic

EDIT

- CM Home Page
- New EMR DB Portal
- Capacity
- Prequalification ▶
- Auction ▶
- Agreement Management
- Delivery
- Capacity Market Deadlines Tool
- Capacity Market Register
- Volume Reallocation Report
- Document Library ▶
- Subscribe for updates

## CM Document Library

This document library contains links to all of our publication items. You can browse the folders, by either clicking the links below or using the navigation

1. **Guidance**
2. **Registers**
3. **Auction Results**
4. **System Stress Event**

EDIT

- CM Home Page
- New EMR DB Portal
- Capacity
- Prequalification ▶
- Auction ▶
- Agreement Management
- Delivery

## Guidance

+ new document or drag files here

✓ Name

- ▶ Category : **Agreement Management** (22)
- ▶ Category : **Capacity Market Information** (89)
- ▶ Category : **Prequalification** (20)
- ▶ Category : **Templates** (21)

## Old Style Guidance Location

EDIT
















- CM Home Page
- New EMR DB Portal
- Capacity
- Prequalification ▶
- Auction ▶
- Agreement Management
- Delivery
- Capacity Market Deadlines Tool
- Capacity Market Register
- Volume Reallocation Report
- Document Library ▶
- Subscribe for updates

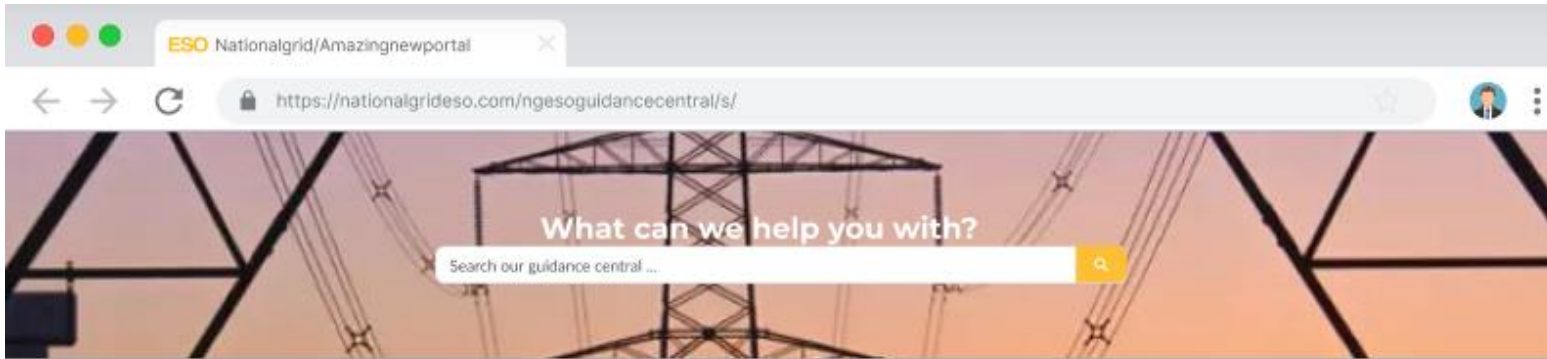
## Guidance

+ new document or drag files here

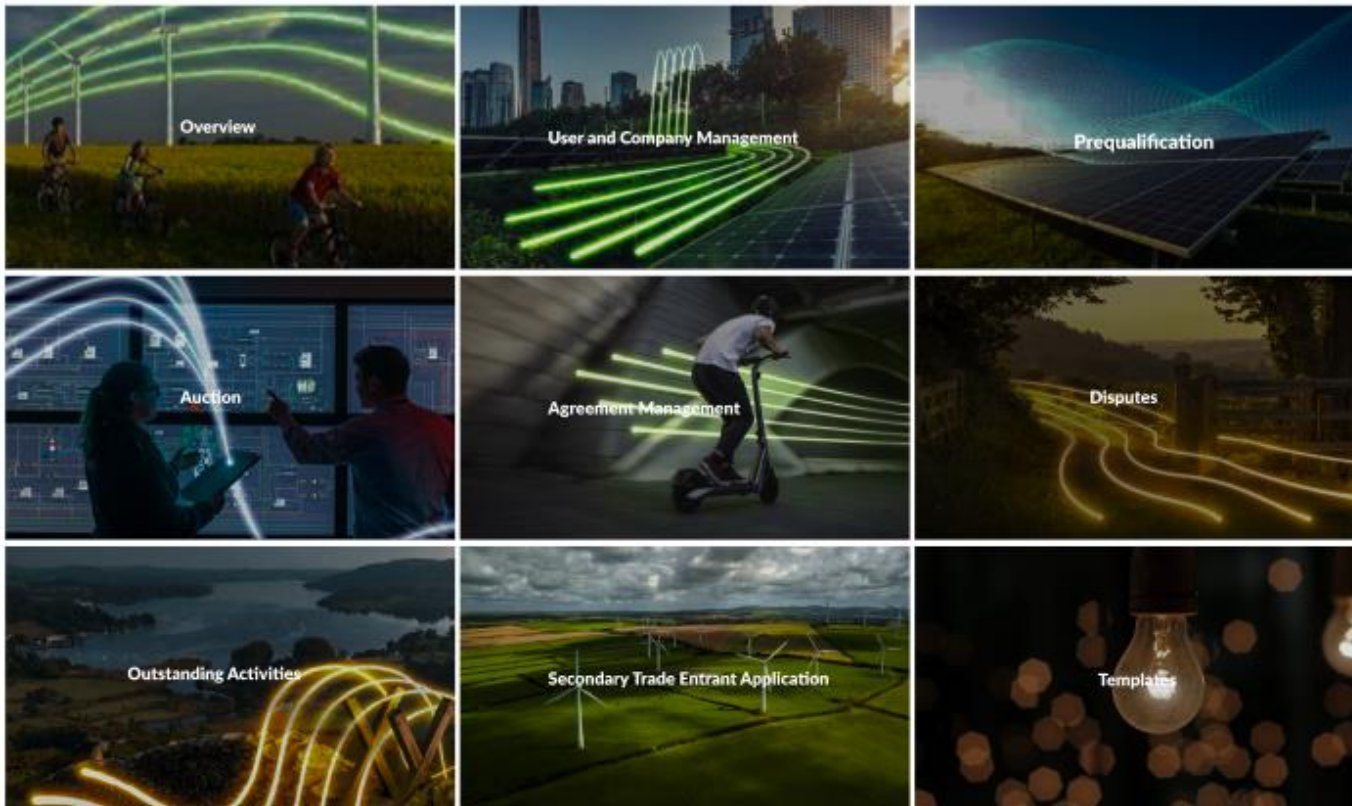
✓ Name

▶ Category : **Agreement Management** (22)

-  Emissions Material Change Guidance v3.0
-  Monitoring Construction Progress Reports Guidance v4.1
-  Capacity Market Credit Cover Guidance v2.0
-  Total Project Spend Guidance V3.0
-  Extended Years Criteria Guidance v4.0
-  Satisfactory Performance Days and Extended Performance Guidance v4
-  SCM Guidance 9.2
-  Metering Aggregation Guidance v3
-  Security Interest Guidance v3
-  OF12 - DSR Component Reallocation v2
-  Termination Guidance v2
-  CMU Transfer Guidance v5.0
-  Financial Commitment Milestone Guidance v4.3
-  Change of Location Guidance v2.2
-  Extended Years Criteria Guidance v3

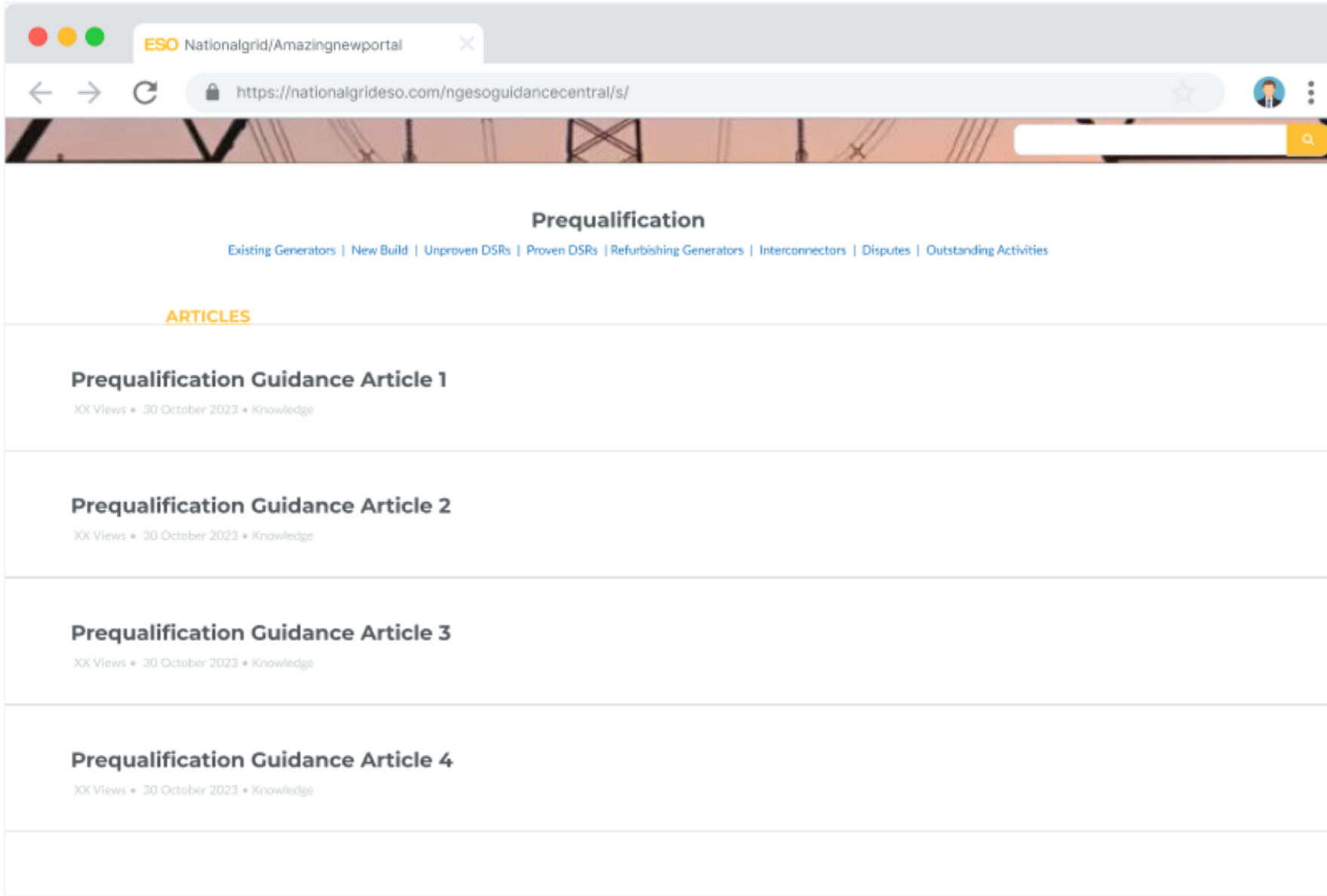


FEATURED TOPICS



Homepage for Guidance Documents  
arranged by Topic/Area





Example Contents Of Prequalification Tile

The screenshot shows a web browser window with the URL [https://www.nationalgrideso.com/emrdeliverybodyportal/My\\_EMR](https://www.nationalgrideso.com/emrdeliverybodyportal/My_EMR). The navigation bar includes 'My EMR', 'User Management', 'Company Management', 'CMU's & Components', 'Disputes', 'Guidance', and 'nationalgridESO | Electricity Market Reform Delivery Body'. A 'Guidance' button is highlighted in yellow.

The main content area is titled 'My EMR' and contains several activity cards under the heading '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.
- Management Activities**: Body copy to be placed in here. Body copy to be placed in here.
- Auction Activities** (highlighted in yellow): Body copy to be placed in here. Body copy to be placed in here.
- 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.
- Delivery Body Notices**: Body copy to be placed in here. Body copy to be placed in here.
- Capacity Agreement Notices (CANs)**: Body copy to be placed in here. Body copy to be placed in here.

On the right side, there are two tables:

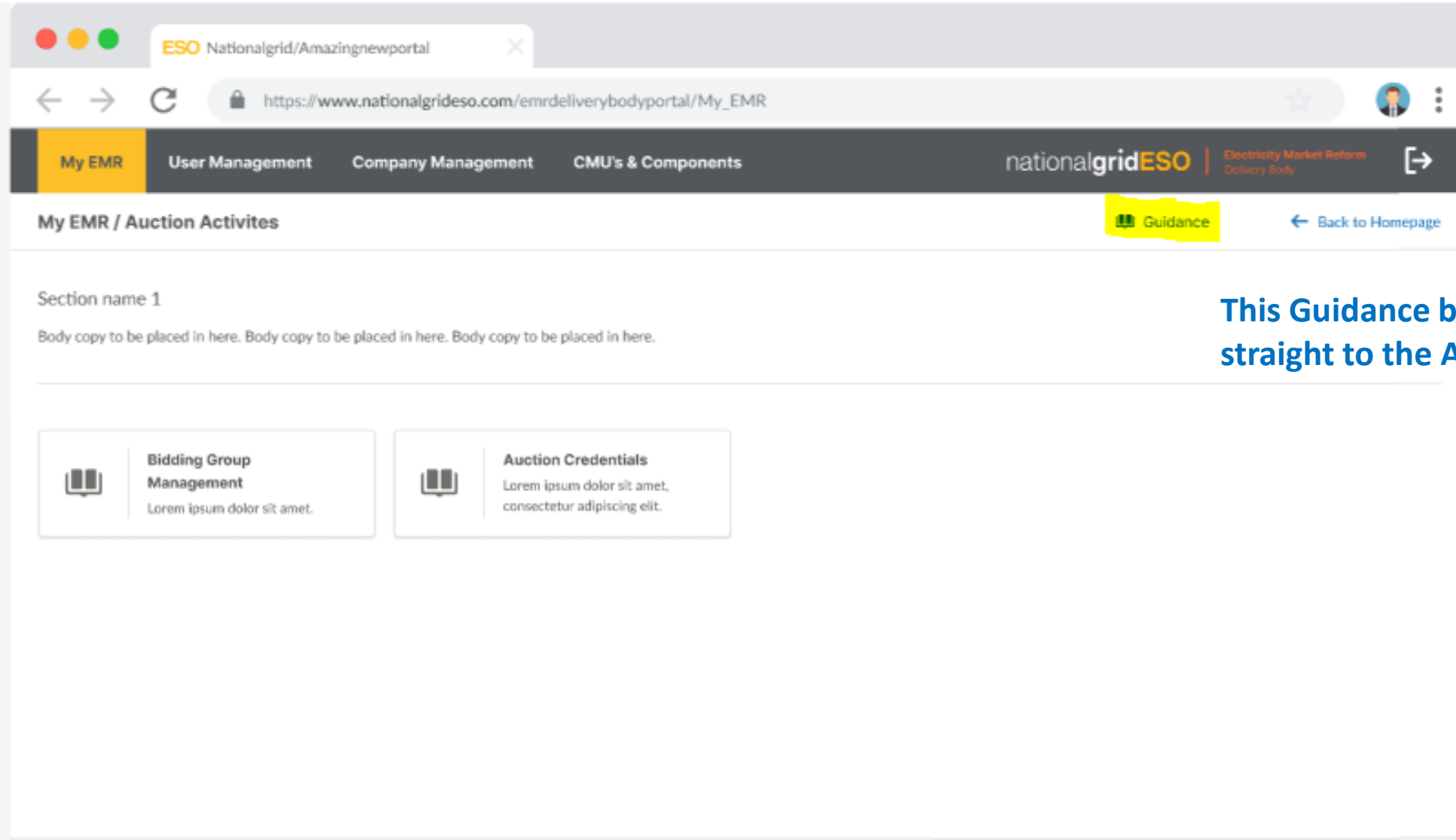
**Prequalification Auctions**

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>

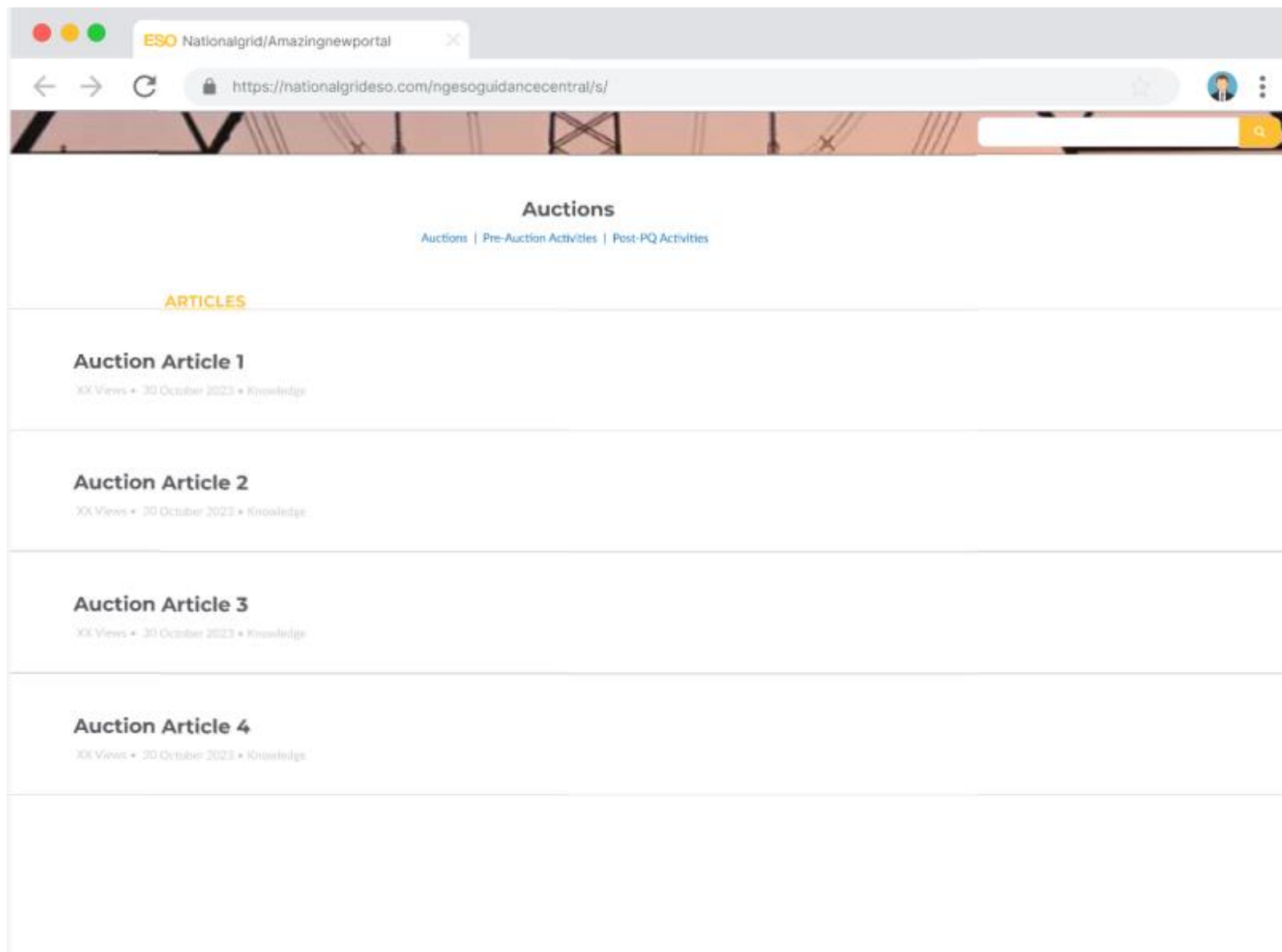
**Secondary Trade Entrant**

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>
2022-23 T-1	T-1	2023	<a href="#">Apply</a>
[Title]	T-4	2027	<a href="#">Apply</a>

This link takes you directly to the new guidance homepage



This Guidance button takes you straight to the Auction Guidance Tile



# Rule Change Data Visibility

## Feature Description

Since the implementation of the Capacity Market Rules for Prequalification 2014, there have been changes to data items required at Prequalification. This feature ensures that those data items are still visible against the historical relevant applications and not provided for new applications where the data item is no longer required or has been amended.

## Customer Feedback Considered

- Ensures that there is a clear audit trail of all information provided within an application
- Only provide information in the application that is relevant to that process

## High-level Requirements Proposed

- The system will only display items that were part of the relevant application
- New applications will only include data fields that remain part of the application process for that Prequalification round

Company Name / Create Application

AB73WV	Status	Application ID	Applicant Company	
Unproven DSR	Prequalified	A-T-1-2022-AB73WV-00001	Company Name long long name	<a href="#">Cancel</a>

- Application Details - Review
- Applications Questions
- Declarations
- Emissions
- Historical Questions

Start of Date Range for Historic Performance Data

Start of Date Range for Historic Performance Data (DD/MM/YYYY)

3.6.1(aa) previously requested a date range, this removed from CM Rules in 2018, date range no longer required in CM Rules, its now the settlement data within the lastet 24 months

12/12/2016

End of Date Range for Historic Performance Data

End of Date Range for Historic Performance Data (DD/MM/YYYY)

3.6.1(aa) previously requested a date range, this removed from CM Rules in 2018, date range no longer required in CM Rules, its now the settlement data within the lastet 24 months

A new tab will be displayed on applications showing data items that formed part of the relevant application but are no longer provided for new applications.

An example is the Historic Performance Date Range, which is no longer required for Existing Generating CMUs.



# EMR DB New Portal Familiarisation

# New EMR DB Portal Update

## Dates for your diary

- Thursday 18th January 2024 - Proposed Webinar to launch Go Live I - Company Registration & User Management
- 18th March to 5th April 2024 - Familiarisation of CM Functionality
- May 2024 – Go Live II Full Capacity Market functionality

## New EMR DB Portal Familiarisation window

The EMR Delivery Body are encouraging customers to register interest in participating in a familiarisation window of New Portal functionality. This is a fantastic opportunity to get hands on experience with the Capacity Market processes as presented in the New EMR DB Portal and provide feedback for improvements.

We intend to run the end-to-end familiarisation window for 3 weeks with 1 further week for potential issue resolution. Our dates for the end-to-end familiarisation window are **18 March 2024 to 5 April 2024**.

There will be a suite of new training and guidance material to help you through the familiarisation window and we will be keen to hear your feedback.

[Click here to register your interest](#)

## New Portal Training approach

To support the full Go Live, a suite of training material will be provided and we would like to get your feedback on your preference on training delivery, here's a [quick poll](#) to share your views.

## Any questions?

Please go to [sli.do](https://sli.do) and enter the event code **#1288536** or raise your hand on the call.



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

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

### User Group Plan

Expected Scope	Requirements Playback	Familiarisation Demo
Secondary Trading Transferee, Emissions ZB- ZA, Issue Final Termination, <b>Dispute Results</b> , PM/PT, SoS Changes, Digital Signature , 2023 Regulatory Requirements (Prequal), Emissions Related Material Change, <b>Final Termination</b> , <b>CMU Cloning</b>	Completed	<b>14<sup>th</sup> December</b> & 25 <sup>th</sup> January 2024
Secondary Trade Approval, Component Reallocation, Metering Information/ aggregation, CAN suspension, , Exhibit J Resubmit, EYC, MTC Invalidation, CAN termination dispute AI management, Bidding Group Management, <b>CMU Bulk Uploads</b> , Volume Reallocation Registration, <b>Integrated Guidance</b> , <b>Rule Change Data Visibility</b>	August 17, September 21, October 26th & <b>14<sup>th</sup> December</b>	February 2024

# Continuing the Conversation

**Notes:** Some development items are broken down in to multiple development increments and will be played back and demonstrated at an appropriate time in the development process. The Delivery Body are working with the Electricity Settlements Company to review Metering related process options, which are likely to result in change in those processes.