Customer Requirement Playback & Familiarisation

EMR DB New Portal – 14th December 2023

ESO

Contents

Outstanding Feedback Update

New EMR DB Portal Update

High Level Requirements Playback Features

- Bulk Component Upload
- Integrated Guidance
- Rule change data visibility

Familiarisation Features

- Final Termination Notice
- 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 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

Outstanding Feedback

Sli.do #1288536

Date raised	Feature Area	Customer Comment	DB Response
06/07/2023	Capacity Market Register	Feedback received via Sli-do survey and/or via wider customer feedback: 1) Keen to see CMU ID and Applicant details at Component level to enable better filtering and analysis of the Capacity Market Register 2) Interest in Delivery Year register alongside the main registers for easier visibility 3) Interest in accessing register data via API or relational database format as well as CSV/XLS 4) Separate the post code & Ordnance Survey Grid reference fields/columns 5) Improve how we communicate changes to the structure of CMR 6) Create a Data Dictionary to add use of CMR and how to interpret the information	**Update 14th December 2023** 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. 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. 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. 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. 5) We have already taken action to improve communication this year and we will continue to do this. 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.

Outstanding Feedback

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Date raised	Feature Area	Customer Comment	DB Response
09/11/2023	Digital Signature	Feedback received New Portal Familiarisation session: 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. 2) Feedback raising concern that the SMS two-step authentication will be difficult to manage with their Companies/Directors.	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.

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 with 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

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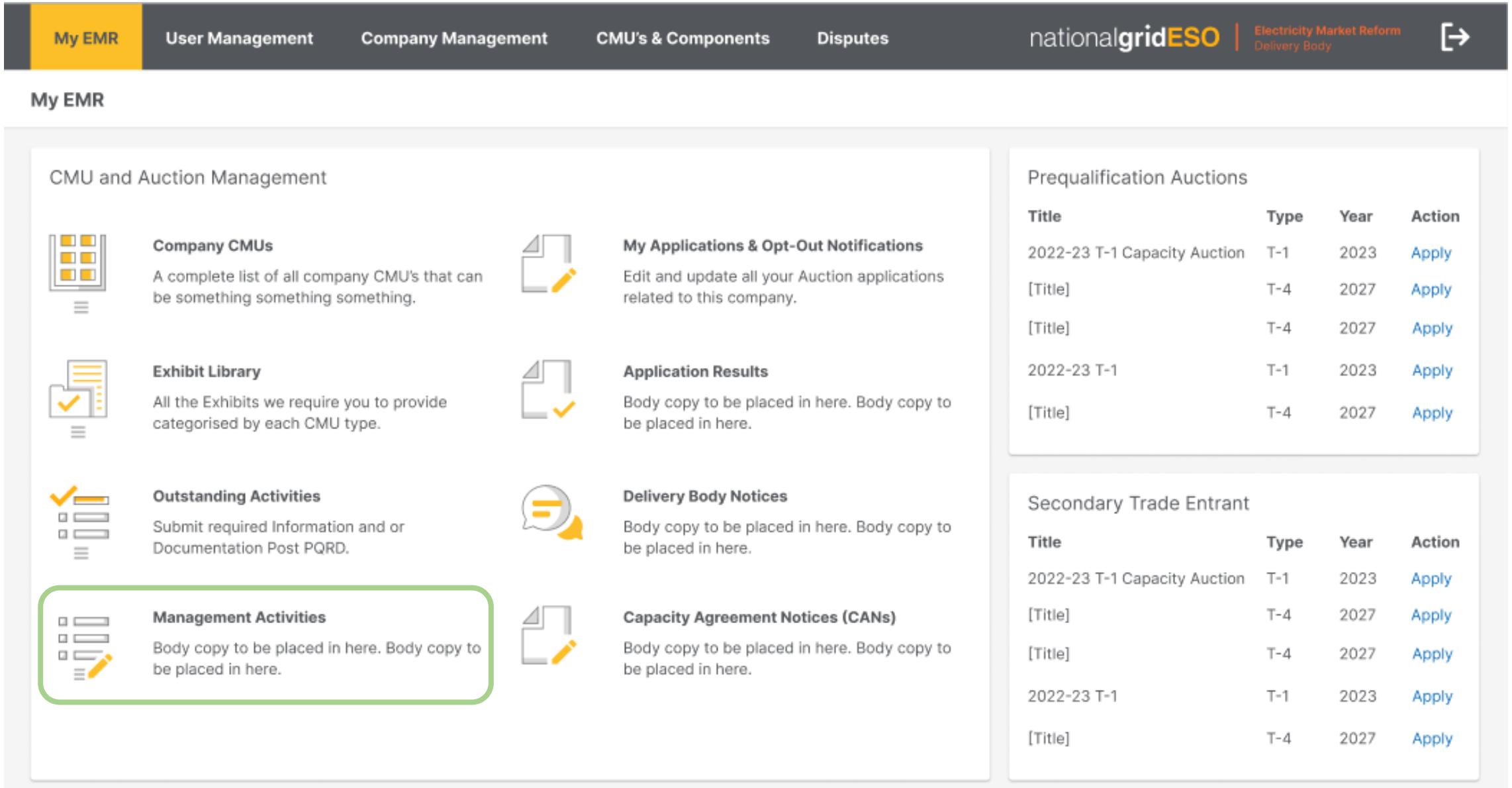

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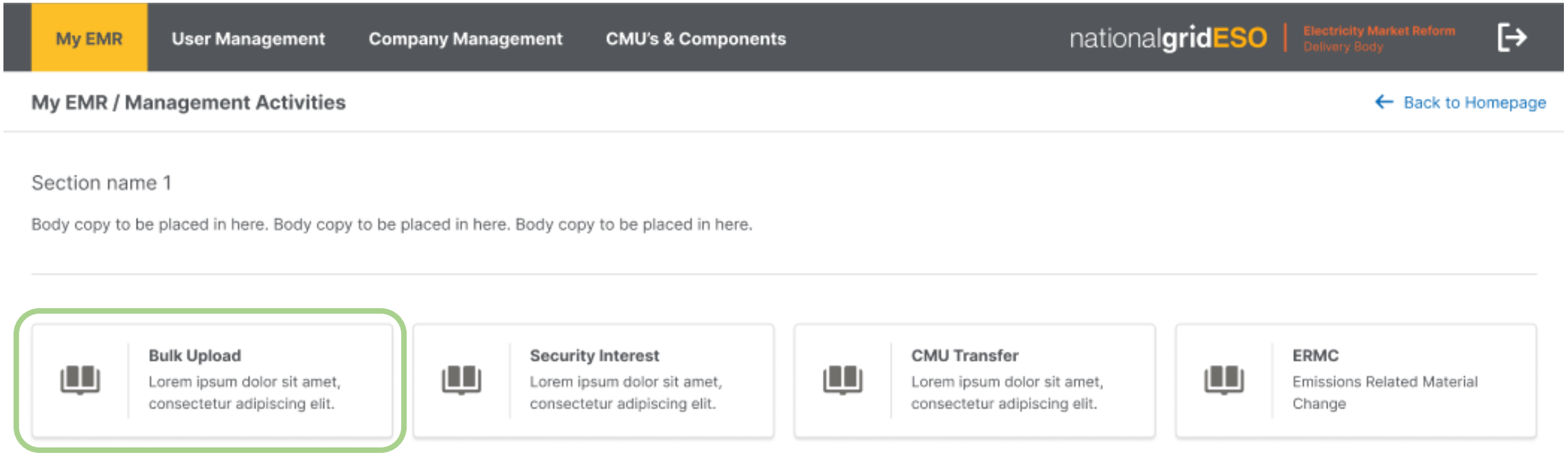

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My EMR | User Management | Company Management | CMU's & Components

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	CSV	XLS
BU-1235	Notify DSR Component	Unproven DSR	Processed - Partial Success with Errors	DD/MM/YYYY	XXXXX XXXXXX	CSV	XLS
BU-1236	Component	New Build Interconnector	Processed - Success	DD/MM/YYYY	XXXXX XXXXXX	CSV	
BU-1237	Component	Proven DSR	Processed - All Errors	DD/MM/YYYY	XXXXX XXXXXX	CSV	XLS
BU-1238	Component	Proven DSR	Submitted	DD/MM/YYYY	XXXXX XXXXXX	CSV	

1 – 5 of 18 items

Page 1 of 4

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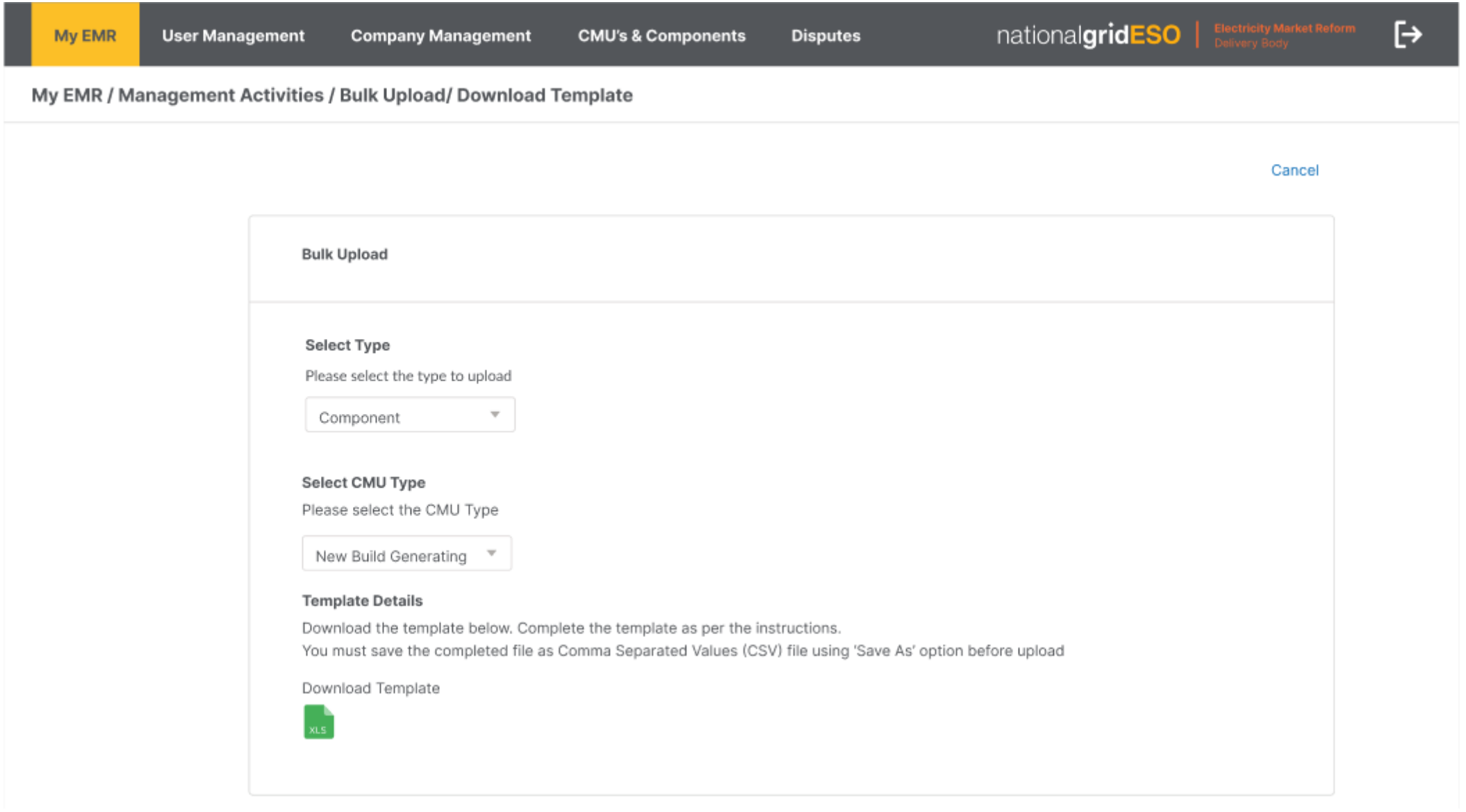

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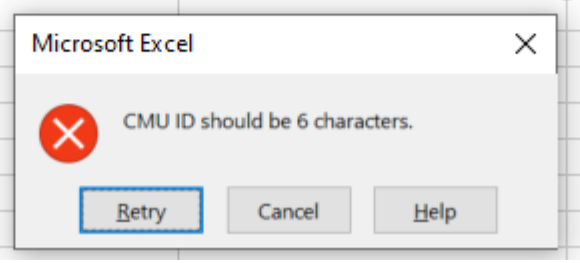
	A	B	C
1	Select the operation for each row Add - Creates a new component Update - Updates existing component Delete - Deletes the component Note: No changes can be made once the application is submitted	Enter your CMU ID here. Make sure it is created in the portal before using it. CMU ID should be 6 characters 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		

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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	CSV	XLS
BU-1235	Notify DSR Component	Unproven DSR	Processed - Partial Success with Errors	DD/MM/YYYY	XXXXX XXXXXX	CSV	XLS
BU-1236	Component	New Build Interconnector	Processed - Success	DD/MM/YYYY	XXXXX XXXXXX	CSV	
BU-1237	Component	Proven DSR	Processed - All Errors	DD/MM/YYYY	XXXXX XXXXXX	CSV	XLS
BU-1238	Component	Proven DSR	Submitted	DD/MM/YYYY	XXXXX XXXXXX	CSV	

1 – 5 of 18 items

Page 1 of 4

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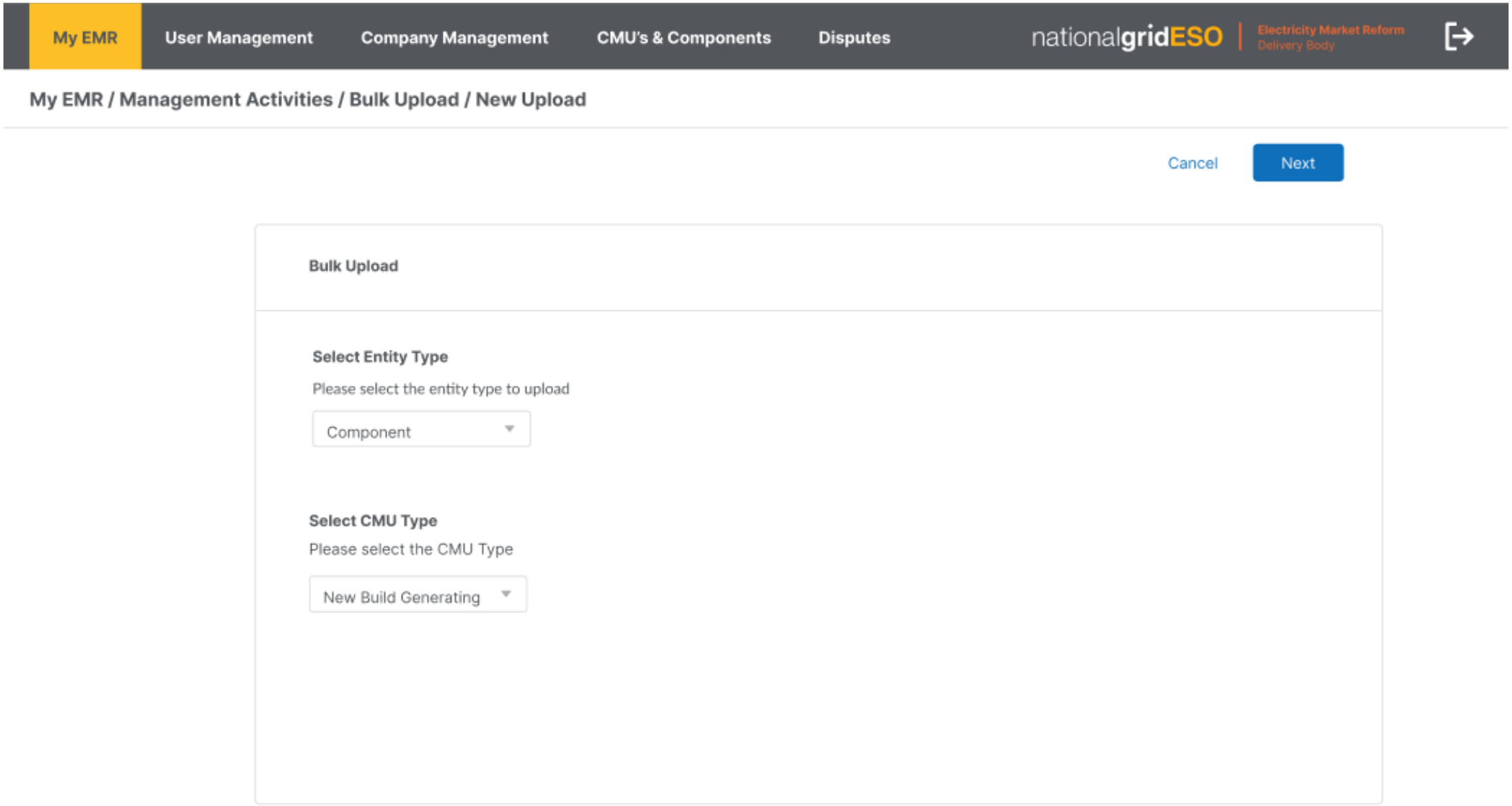

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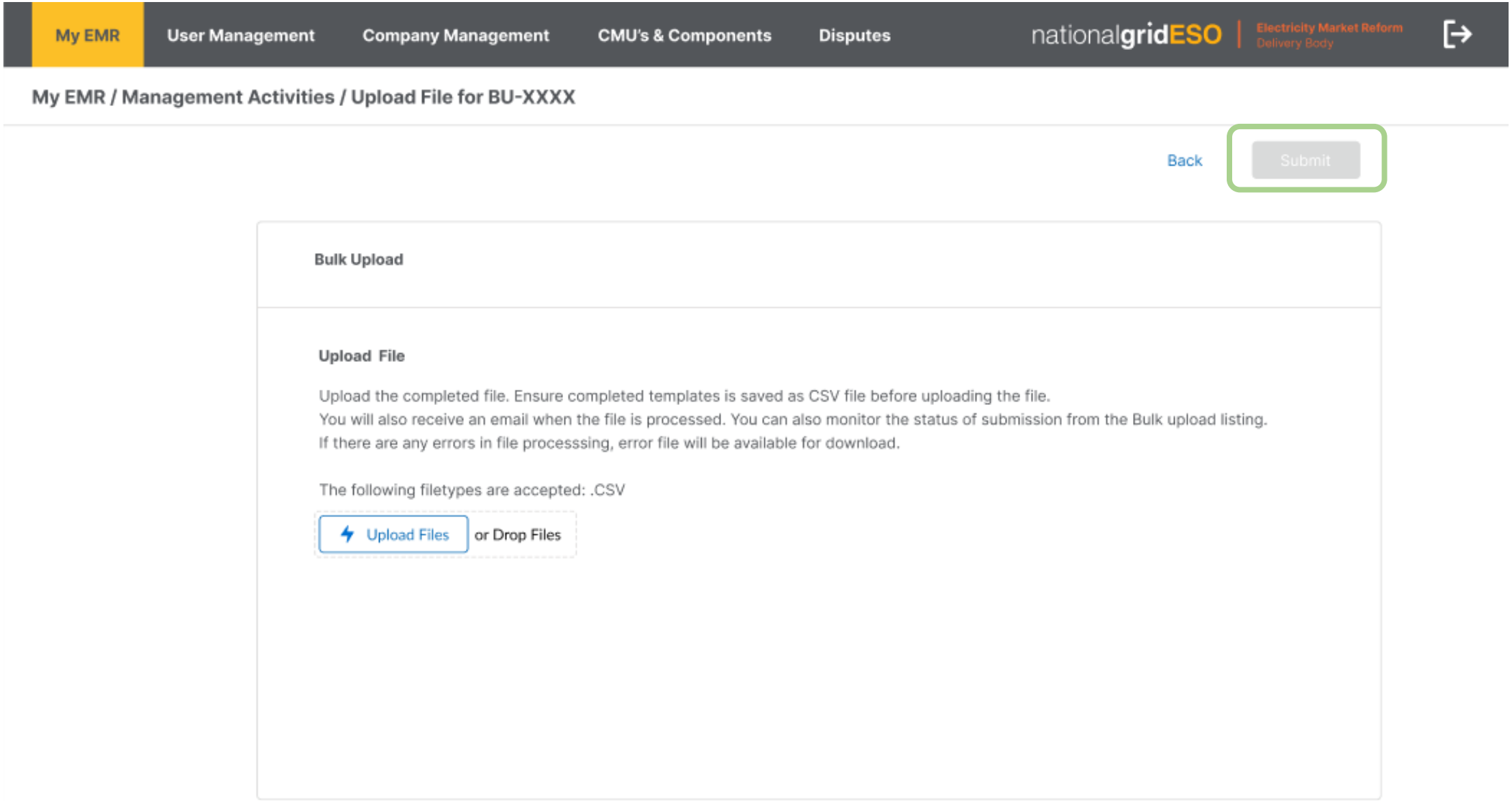

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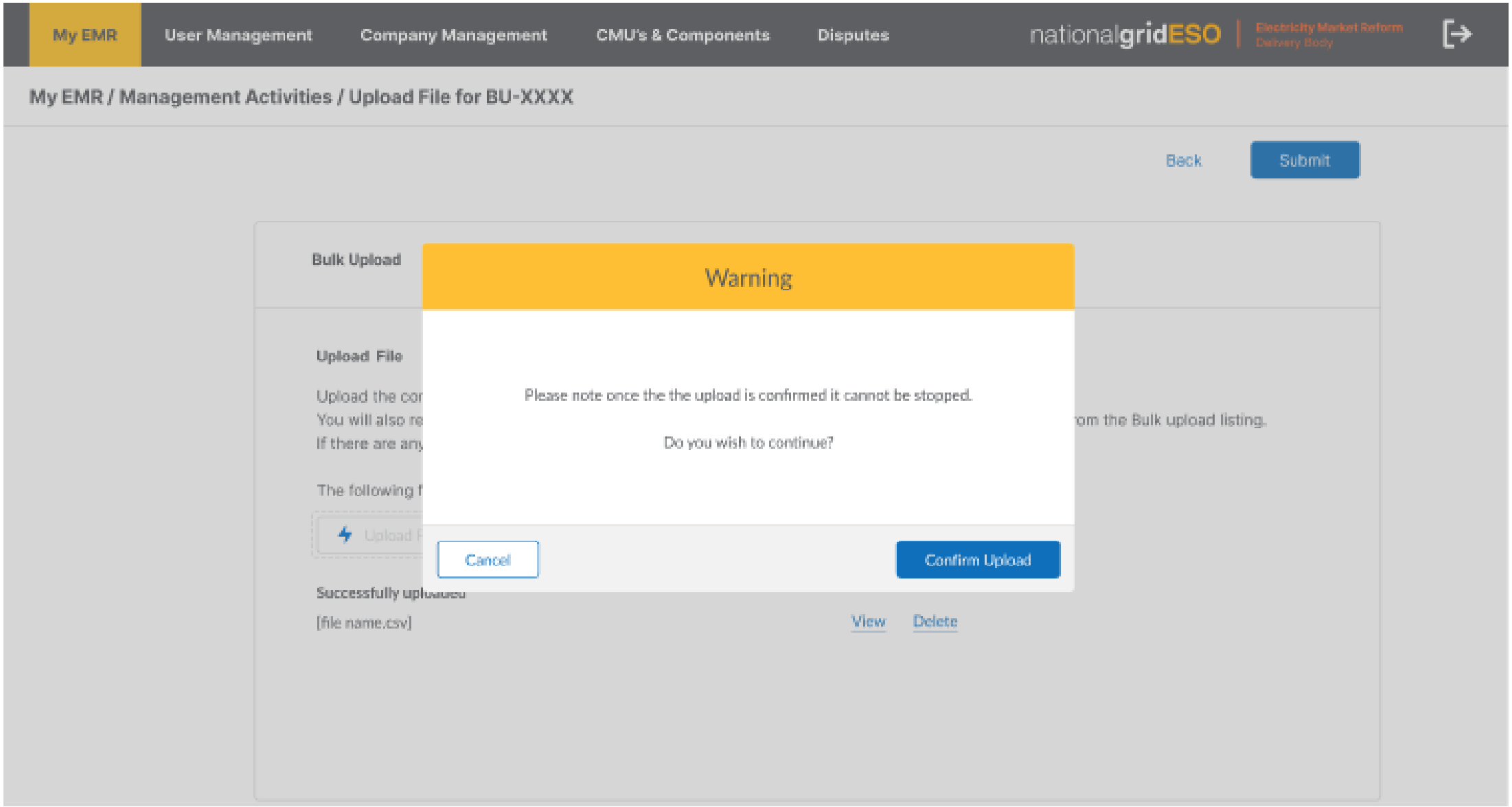

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My EMR | User Management | Company Management | CMU's & Components

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 XXXXXXX	CSV	CSV
BU-1235	Notify DSR Component	Unproven DSR	Processed - Partial Success with Errors	DD/MM/YYYY	XXXXXX XXXXXXX	CSV	CSV
BU-1236	Component	New Build Interconnector	Processed - Success	DD/MM/YYYY	XXXXXX XXXXXXX	CSV	
BU-1237	Component	New Build Generating	Submitted	DD/MM/YYYY	XXXXXX XXXXXXX	CSV	

1 – 4 of 15 items

Page 1 of 4

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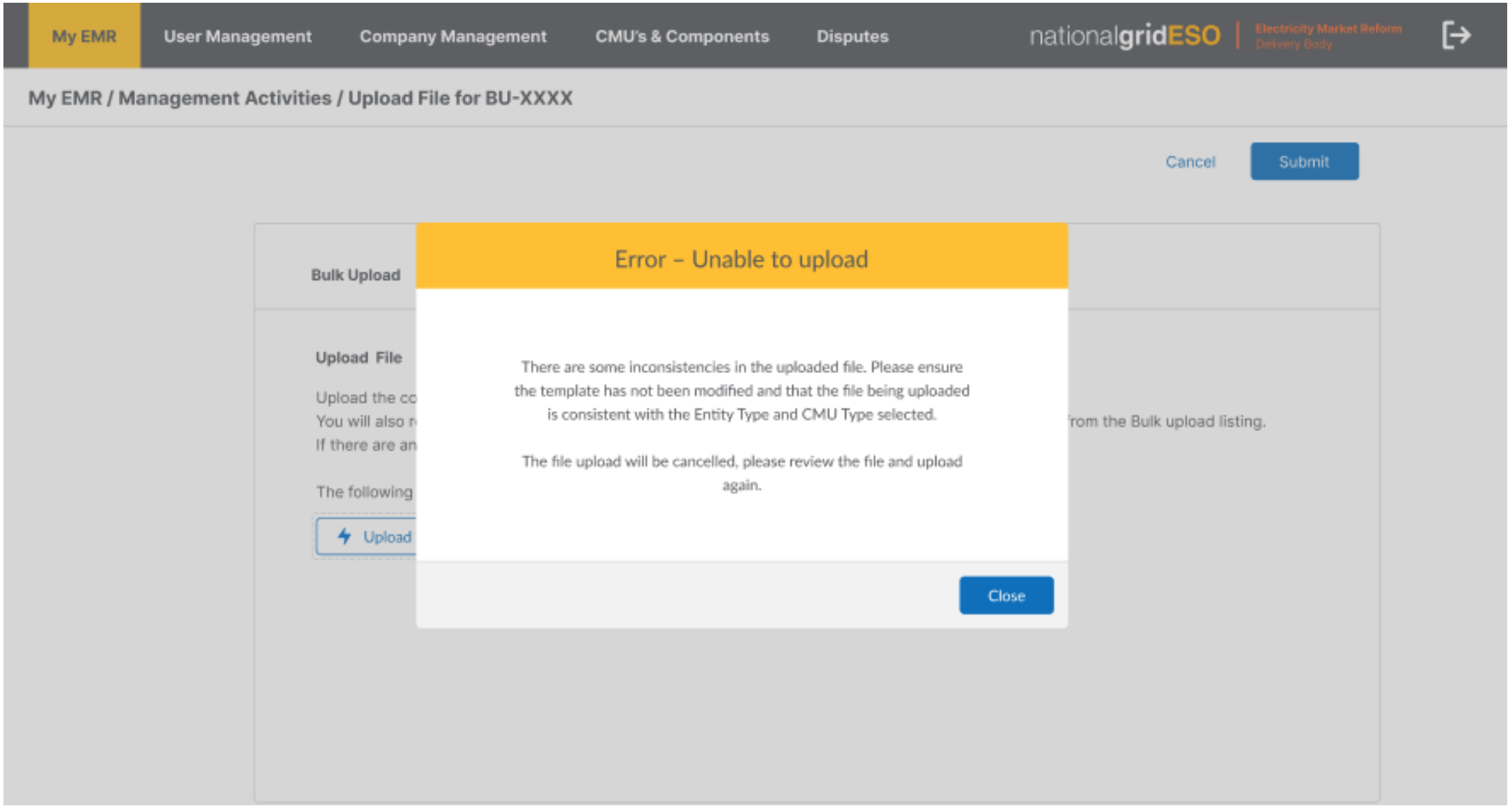

Integrated Guidance

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

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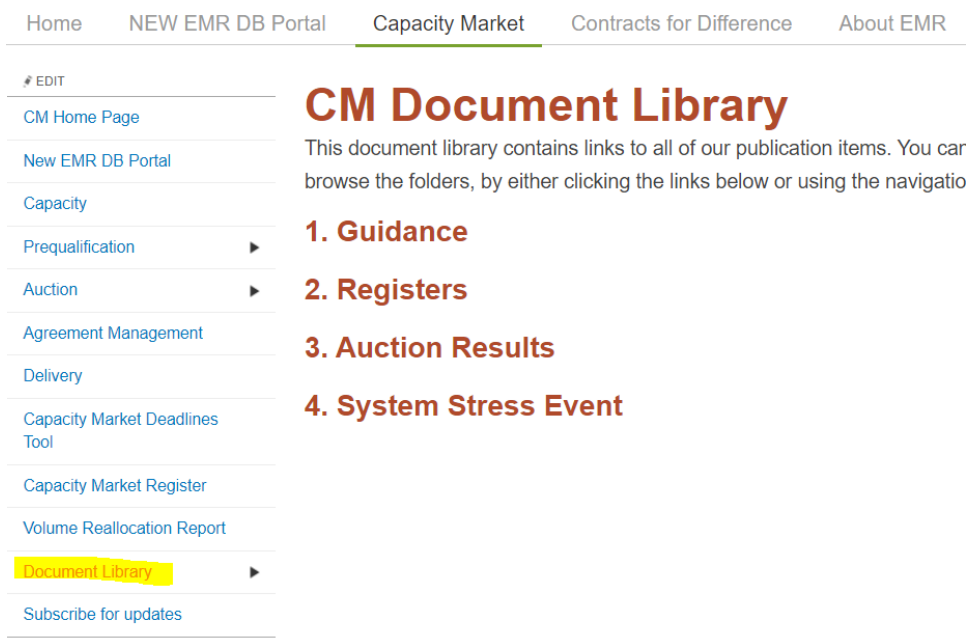
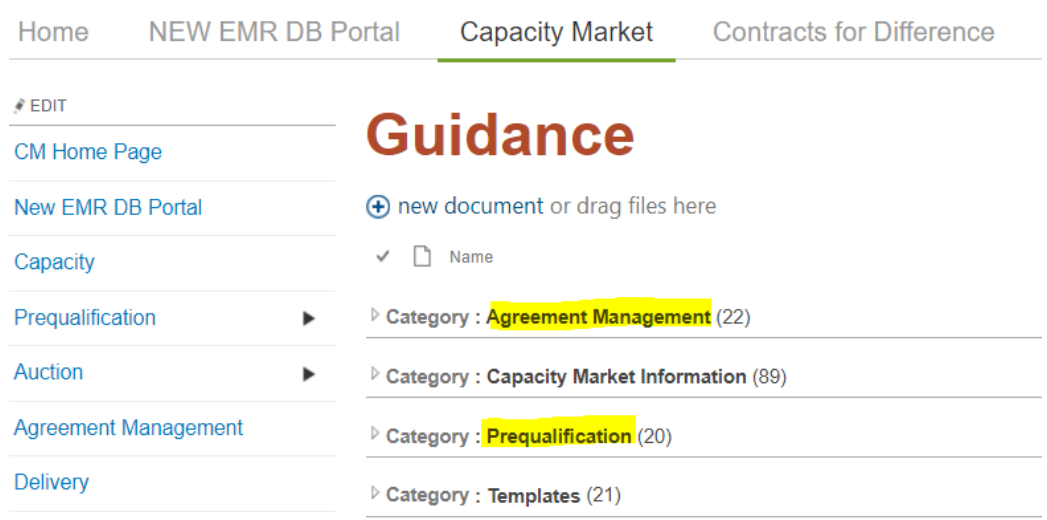
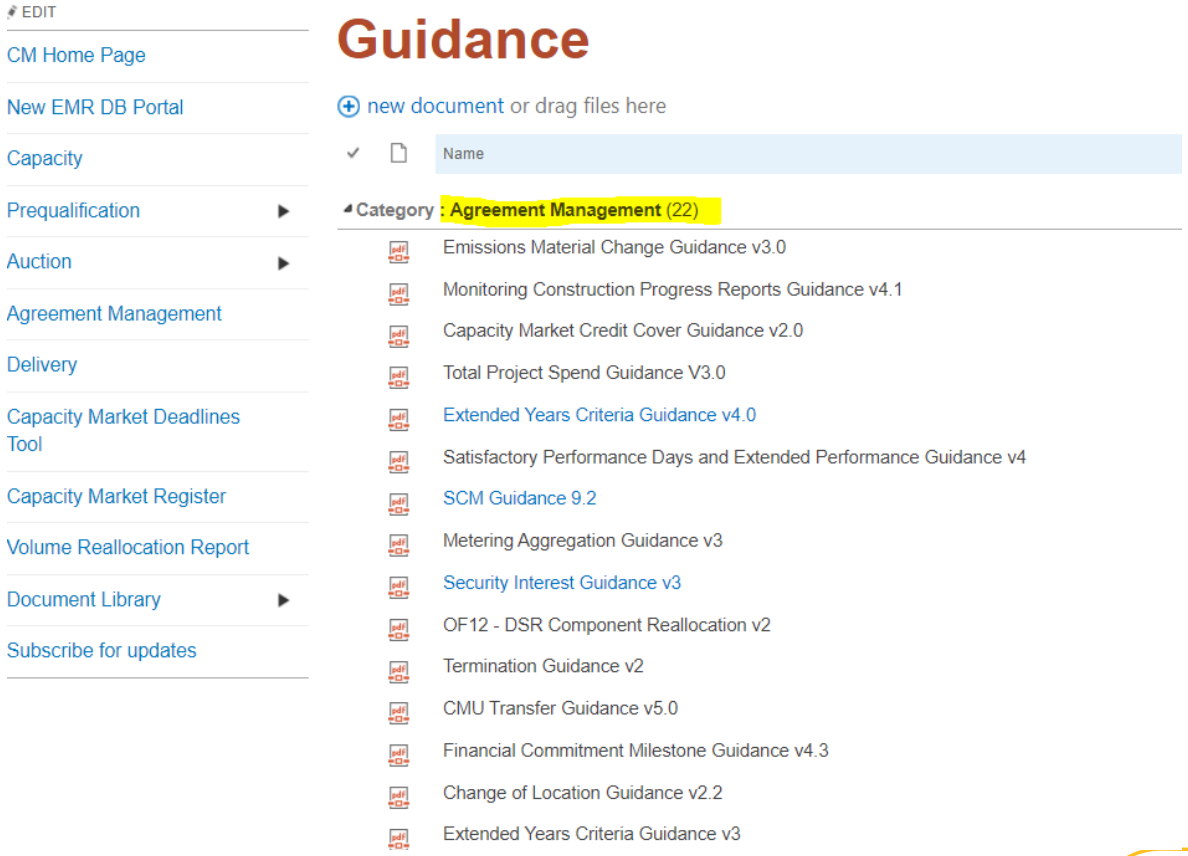


Old Style Guidance Location





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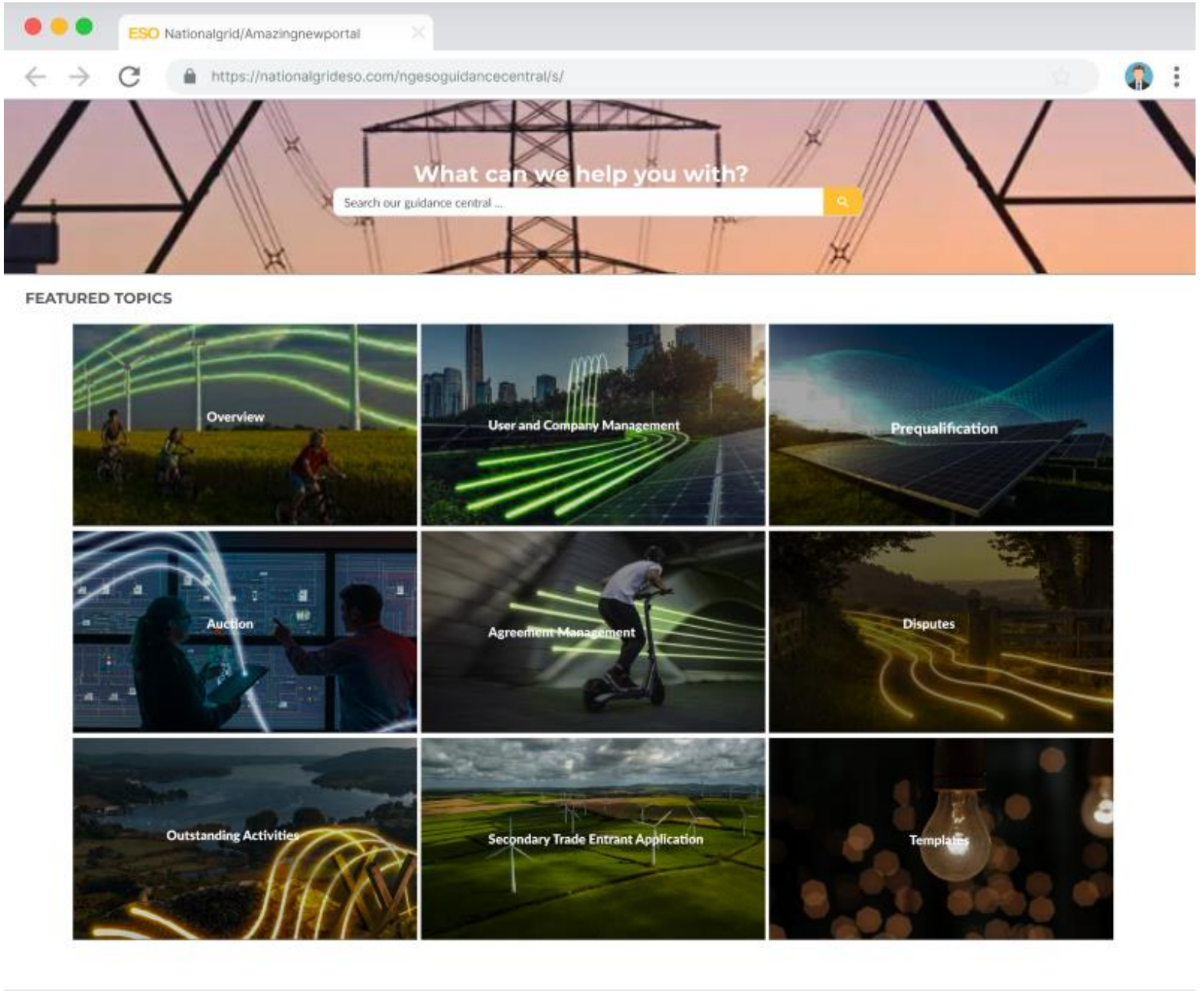

Homepage for Guidance Documents arranged by Topic/Area

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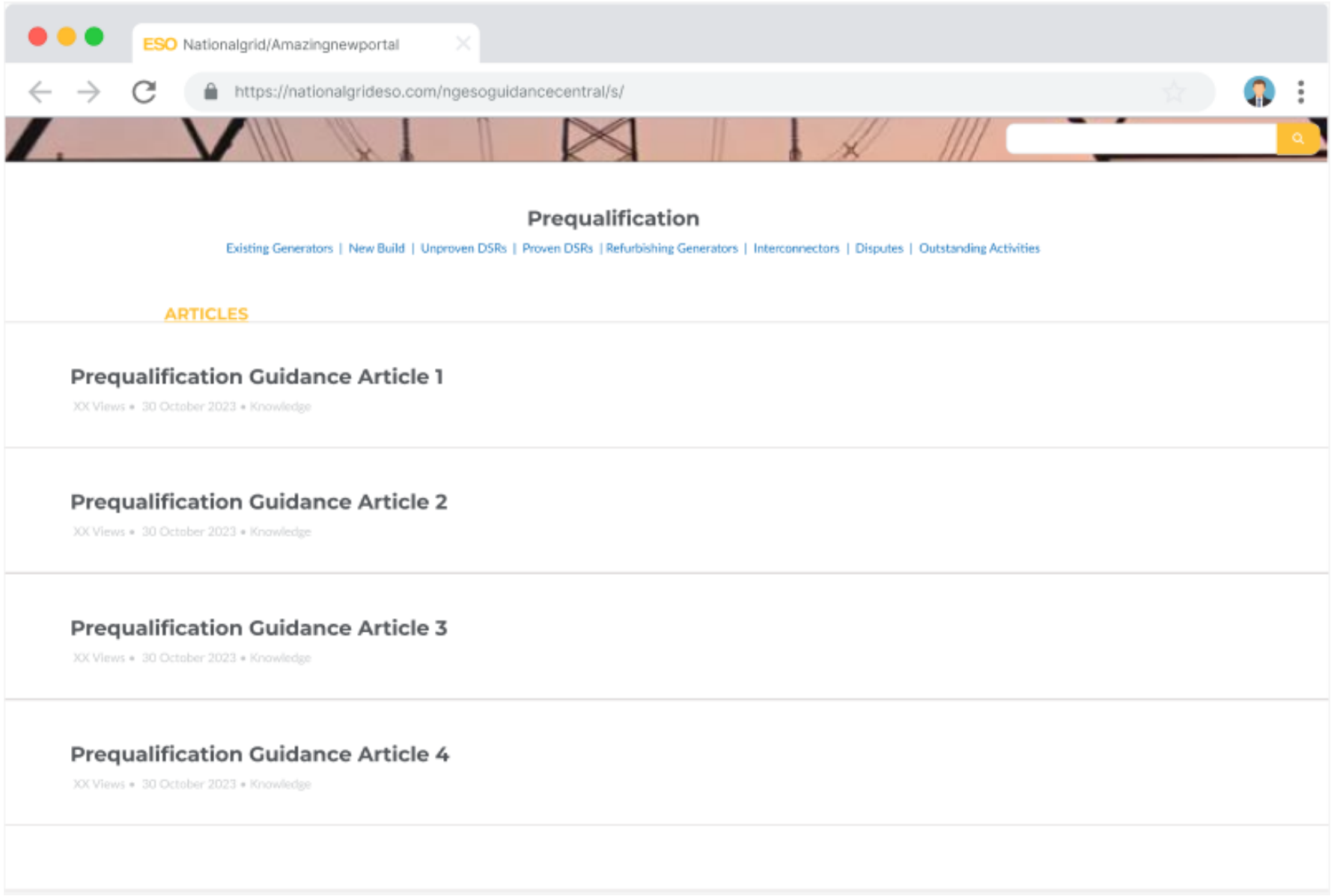

Example Contents Of Prequalification Tile

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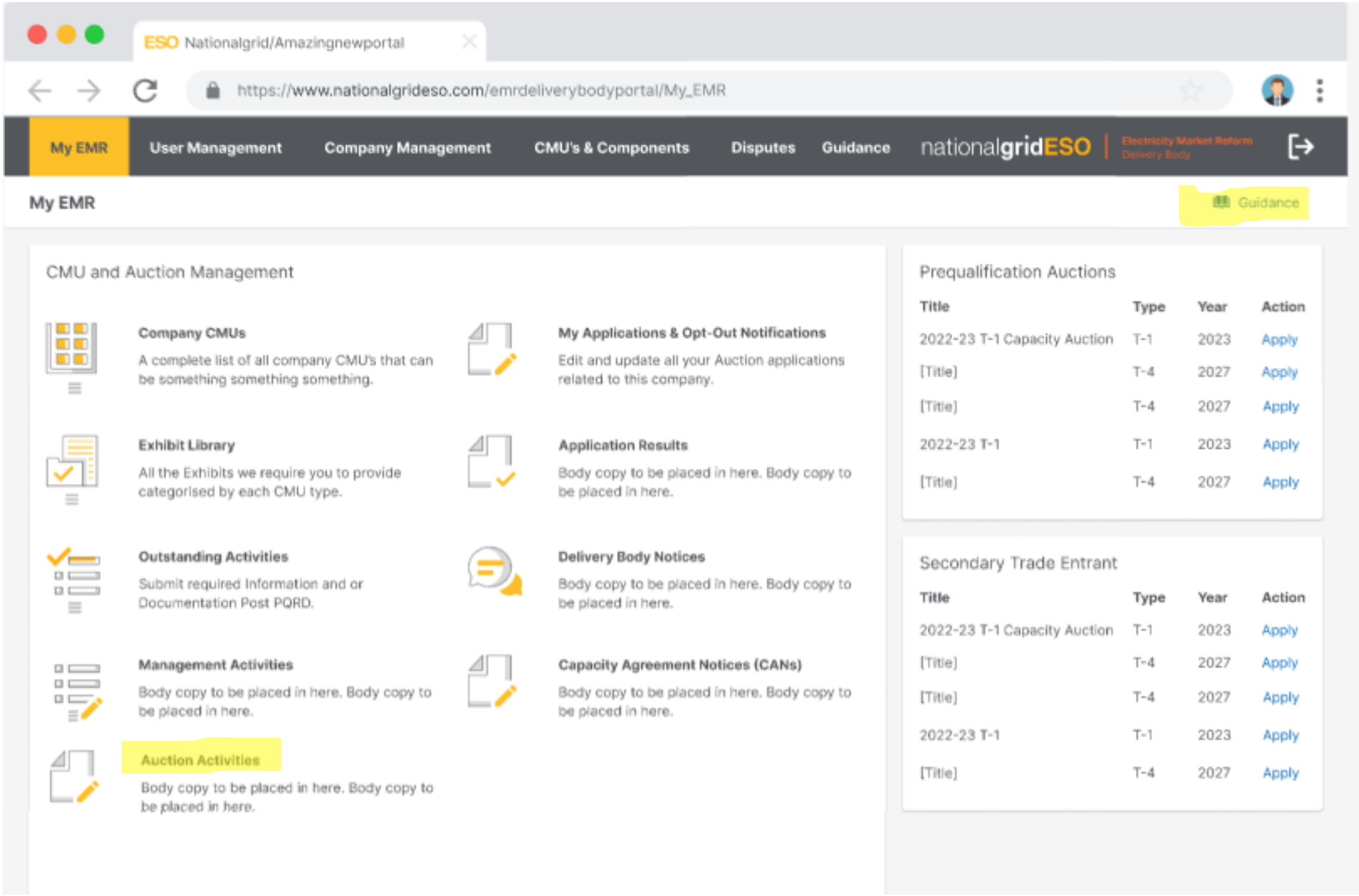

This link takes you directly to the new guidance homepage

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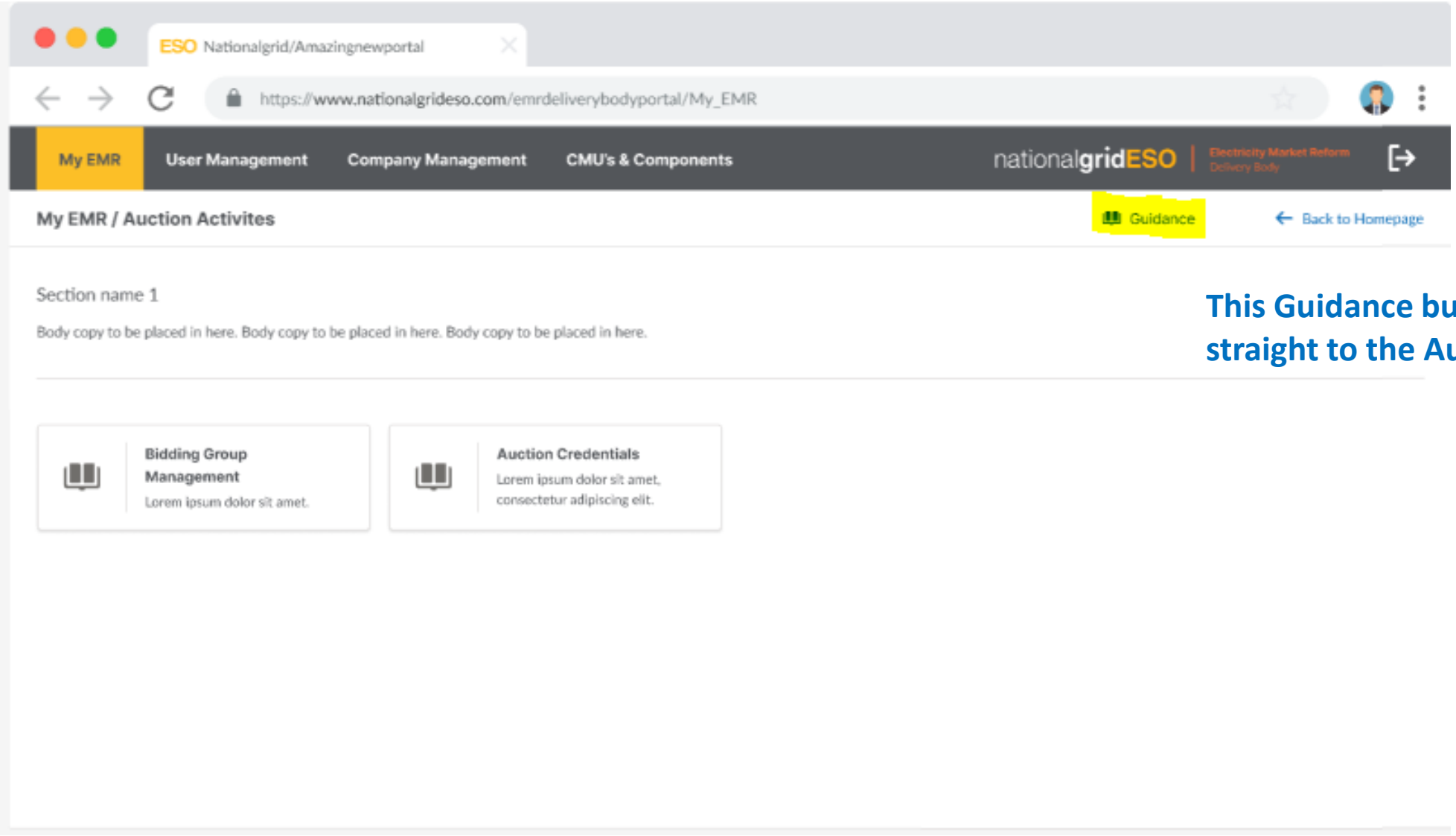
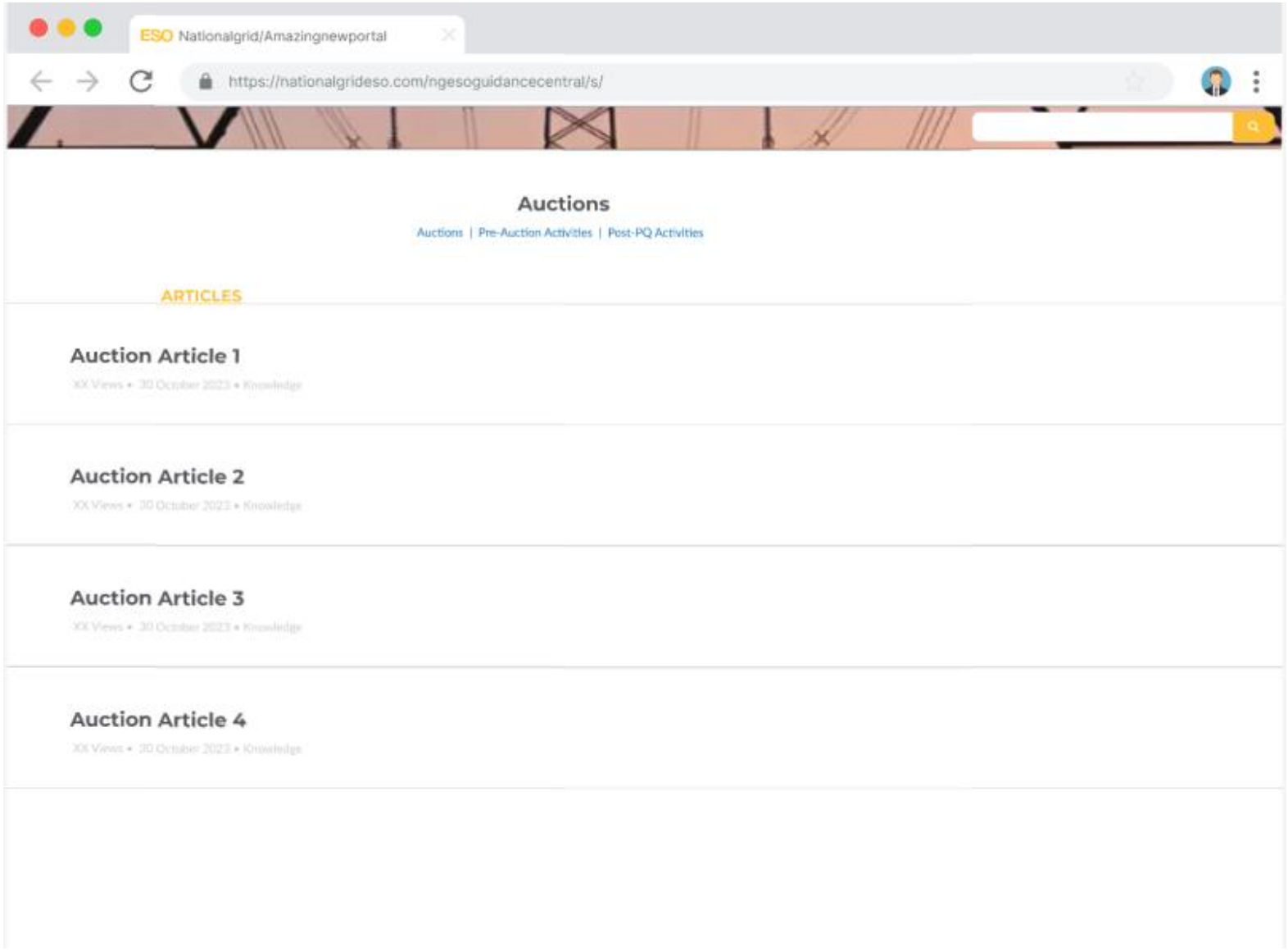


This Guidance button takes you straight to the Auction Guidance Tile

Sli.do #1288536



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

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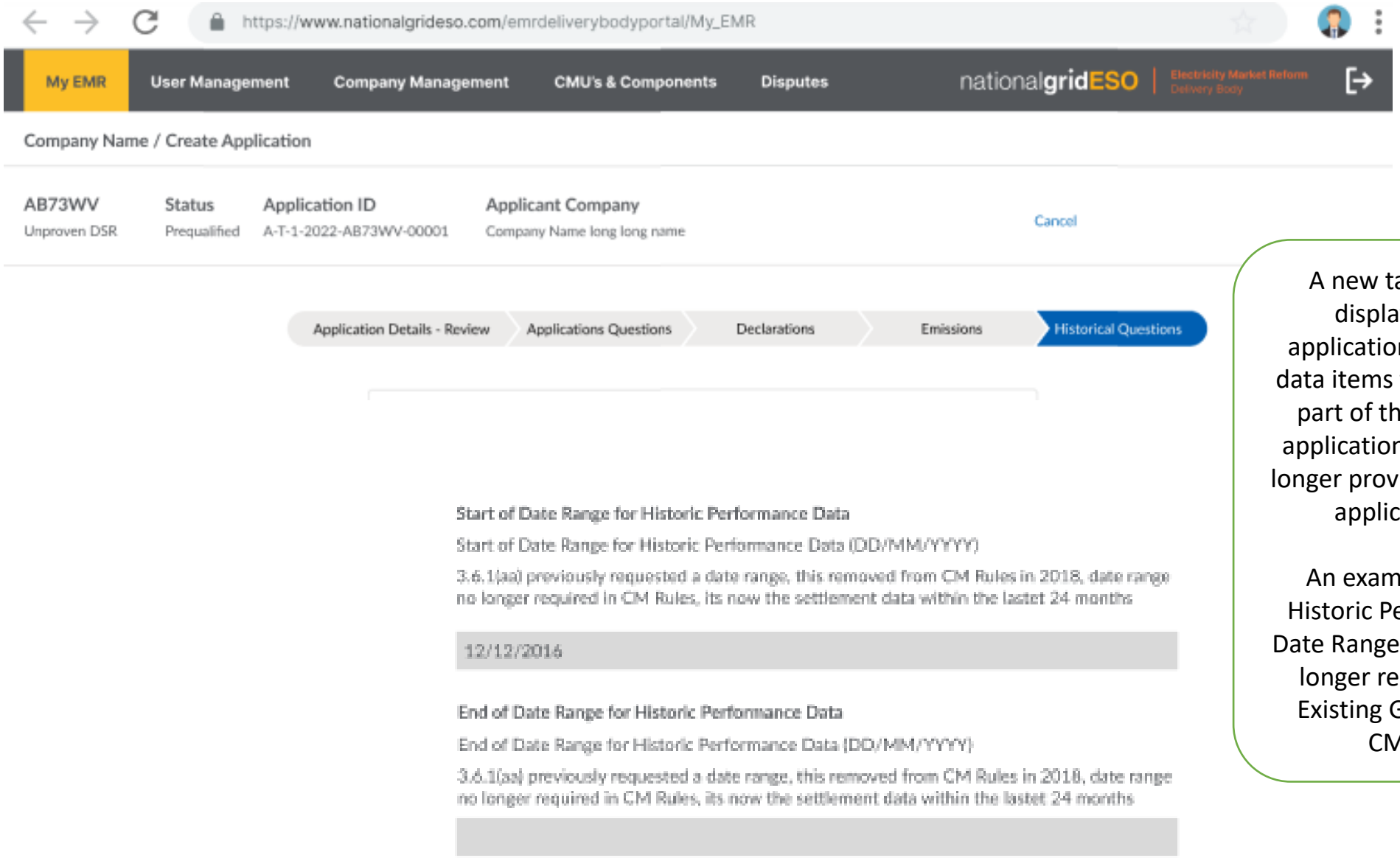

A new tab will be displayed on applications showing data items that formed part of the relevant application but are no longer provided for new applications.

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

EMR DB New Portal Familiarisation

ESO

Sli.do #1288536

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 and enter the event code **#1288536** or raise your hand on the call.

Continuing the Conversation

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.

User Group Plan

Expected Scope	Requirements Playback	Familiarisation Demo
Secondary Trading Transferee, Emissions ZB- ZA, Issue Final Termination, Dispute Results, PM/PT, SoS Changes, Digital Signature , 2023 Regulatory Requirements (Prequal), Emissions Related Material Change, Final Termination, CMU Cloning	Completed	14th December & 25th 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, CMU Bulk Uploads, Volume Reallocation Registration, Integrated Guidance, Rule Change Data Visibility	August 17, September 21, October 26th & 14th December	February 2024

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.