



EMR New Portal Familiarisation Window

Purpose Of The Familiarisation Window

We are offering customers the unique opportunity to take part in familiarisation of New Portal functionality. This will help you prepare before we release full functionality, and is an opportunity for you to provide valuable feedback on what has been developed and delivered in the New Portal.

The Familiarisation Window will not provide an exact replica of the real operational processes or detailed, formal assessments, but rather it allows you to go through the main components of the flow and process on the new system.

It is important to note that not all processes and individual scenarios will be possible to test. Wherever achievable, we will make data modifications to allow you to familiarise yourself with specific processes or scenarios if you wish to do so.

The Familiarisation Window (FW)

We will be running the Familiarisation Window for 3 weeks, from the **18 March to 5 April 2024** (+1 week for issue resolution).

We intend to offer end-to-end familiarisation of the Capacity Market process on the New Portal, including:

- ✓ Prequalification
- ✓ Disputes
- ✓ Pre-Auction Activities
- ✓ Auction Results (CANs)
- ✓ Agreement Management Activities

A support line will be set up for the duration of the FW for any issues or queries.

Early versions of New Portal guidance and training material are intended to be made available to you in advance. We encourage you to use this guidance and training material, and where possible provide us with feedback on its use to support the process, prior to the full go-live.

We will provide regular updates to participants on any issues found during the FW, and will resolve any critical issues before the full go-live.

Proposed Plan For FW

	March										April					
	WK 1					WK 2					WK 3					
Day	18	19	20	21	22	25	26	27	28	29	1	2	3	4	5	
Cycle 1	CMU Creation & PQ Submission		PQ Assessment & Results	Disputes / Pre-Auction Activities	Disputes Results / Pre-Auction Activities	Pre-Auction Activities / Confirmation Of Entry	Auction Results (T-1/T-4) & CANs	AM Activities / Secondary Trading		Bank Holiday	Bank Holiday	AM Activities / Secondary Trading				
Cycle 2			CMU Creation & PQ Submission		PQ Assessment & Results	Disputes / Pre-Auction Activities	Disputes Results / Pre-Auction Activities	Pre-Auction Activities / Confirmation Of Entry	Auction Results (T-1/T-4) & CANs			AM Activities / Secondary Trading				
Cycle 3				CMU Creation & PQ Submission	CMU Creation & PQ Submission	PQ Assessment & Results	Disputes / Pre-Auction Activities	Disputes Results / Pre-Auction Activities	AM Activities / Secondary Trading			Pre-Auction Activities / Confirmation Of Entry	Auction Results (T-1/T-4) & CANs			
Cycle 4	PQ Application Submissions															
Cycle 5	AM Activities / ST Familiarisation (For Users With Existing Agreements)															

We intend to run 5 cycles during the Familiarisation Window:

- **Cycles 1-3:** end-to-end journey through CM process available to any users
 - This is a process-based journey, which means there are dependencies between stages; you must start the journey to go through the processes, to the end
- **Cycle 4:** familiarisation with Prequalification application submissions available to any users
- **Cycle 5:** familiarisation with Agreement Management activities only available to users with existing agreements
 - Data and agreements will be copied over to the environment before the start of the FW

Cycles 4 & 5 will be open throughout the FW, while cycles 1-3 will open and close to users at a certain date/time.

Your Preferences

Day	March										April						
	WK 1					WK 2					WK 3						
	18	19	20	21	22	25	26	27	28	29	1	2	3	4	5		
Cycle 1	CMU Creation & PQ Submission		PQ Assessment & Results	Disputes / Pre-Auction Activities	Disputes Results / Pre-Auction Activities	Pre-Auction Activities / Confirmation Of Entry	Auction Results (T-1/T-4) & CANs	AM Activities / Secondary Trading		Bank Holiday	Bank Holiday	AM Activities / Secondary Trading					
Cycle 2	CMU Creation & PQ Submission			PQ Assessment & Results	Disputes / Pre-Auction Activities	Disputes Results / Pre-Auction Activities	Pre-Auction Activities / Confirmation Of Entry	Auction Results (T-1/T-4) & CANs	AM Activities / Secondary Trading								
Cycle 3					CMU Creation & PQ Submission	CMU Creation & PQ Submission	PQ Assessment & Results	Disputes / Pre-Auction Activities	Disputes Results / Pre-Auction Activities			Pre-Auction Activities / Confirmation Of Entry	Auction Results (T-1/T-4) & CANs	AM Activities / Secondary Trading			
Cycle 4	PQ Application Submissions																
Cycle 5	AM Activities / ST Familiarisation (For Users With Existing Agreements)																

The feedback you can provide will allow us to understand your preferences better and prepare the Delivery Body teams. It is likely that data setup/modification will be required, as these are not exact replicas of real processes and scenarios.

As part of our discussion, we would be keen to understand:

- **The cycle(s) you are interested in**
- **The processes and scenarios you are interested in**
- **No. of applications and users**
- **Your availability**
- **The companies you would like to participate for**

This will help us prepare the necessary support and carry out the data setup for processes/scenarios not readily available.

Next Steps

- Register your company(s) & users on the New Portal
- Deadline to register to have your data migrated for the Familiarisation is the **29th Feb**
 - This is necessary for Cycle 5
- In combination with the FW, we are looking for additional feedback on training preferences; if you haven't already, please complete the brief survey by clicking [this link](#)
- Keep an eye out for updates from us regarding the Familiarisation Window

Contact Us

If you have any additional queries or comments on the Familiarisation Window, please contact us at box.NewEMR.ITteam@nationalgrid.com

Thank you.