

EMR Delivery Body New Portal Webinar

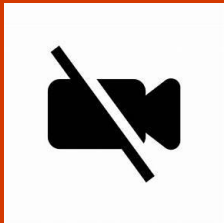
15 May 2024



House Keeping



Microphones on mute



Cameras off



This webinar will be recorded

Got a question?

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



Today's presenters



Rebecca Yang
Head of EMR Delivery Body



Richard Griffiths
EMR Business Change Manager



Anthony Shrimpton
Senior EMR Analyst



Jo Robinson
EMR Analyst



Scott Hughes
EMR Analyst



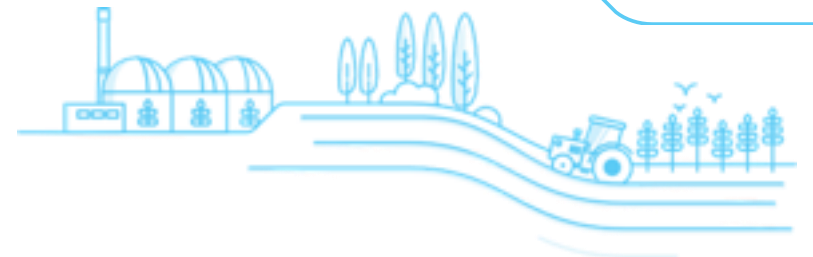
Niharika Bhardwaj
EMR Analyst



Sam Mills
Senior EMR Analyst

Agenda

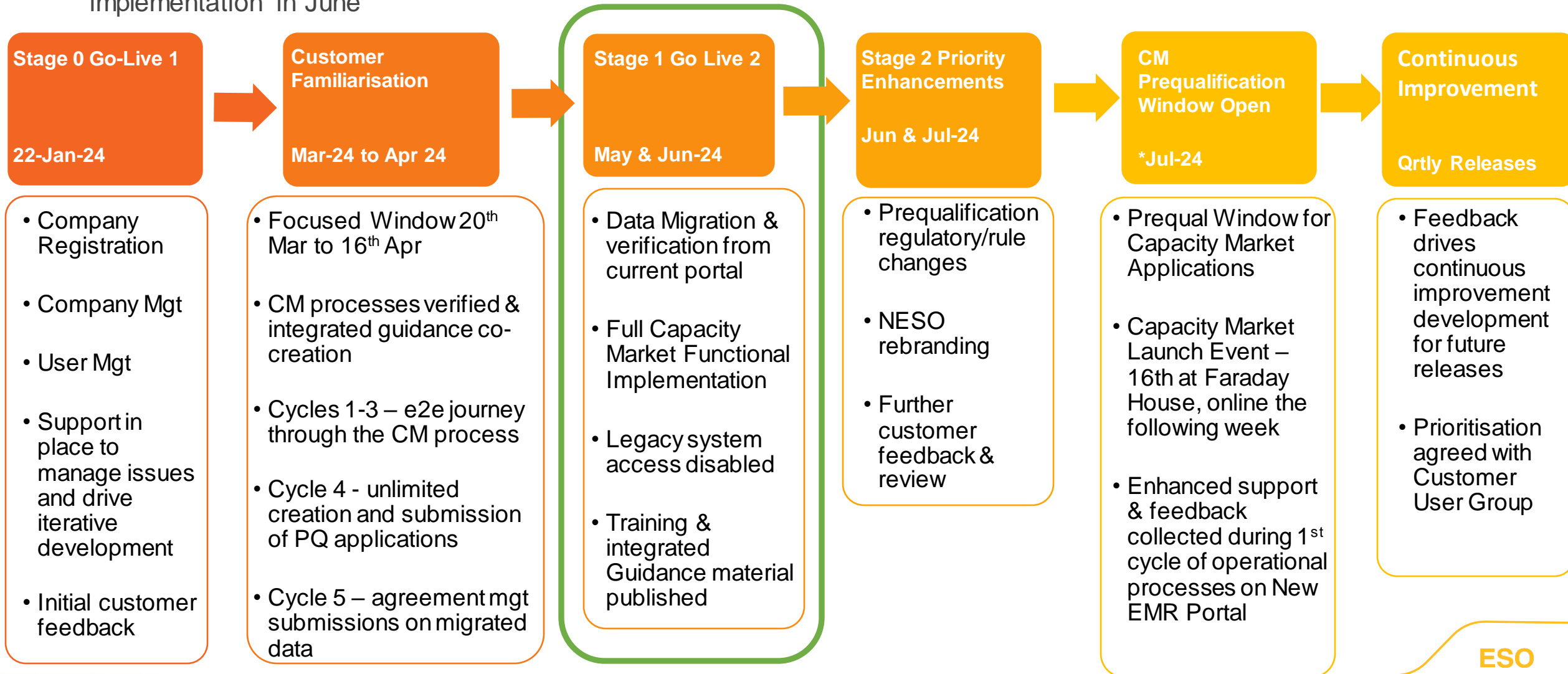
- **New Portal Delivery Milestones**
- **EMR DB New Portal Delivery Transition**
- **Data Migration & Validation**
- **Key Enhancements**
- **Continuous Improvement**
- **What do I need to know?**
- **Available Support**
- **Knowledge site (Integrated Guidance)**
- **Questions & Feedback**
- **Close**



EMR DB New Portal Delivery Milestones

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- Go Live 1 in January was the first step enabler for the overall implementation of the New EMR Delivery Body Portal
- Customers Familiarisation phase run over Mar & Apr across test cycles to gain assurance prior to operational go-live
- Go Live 2 delivery over two phases in May and June - Data Migration and verification in May with full CM deployment and implementation in June



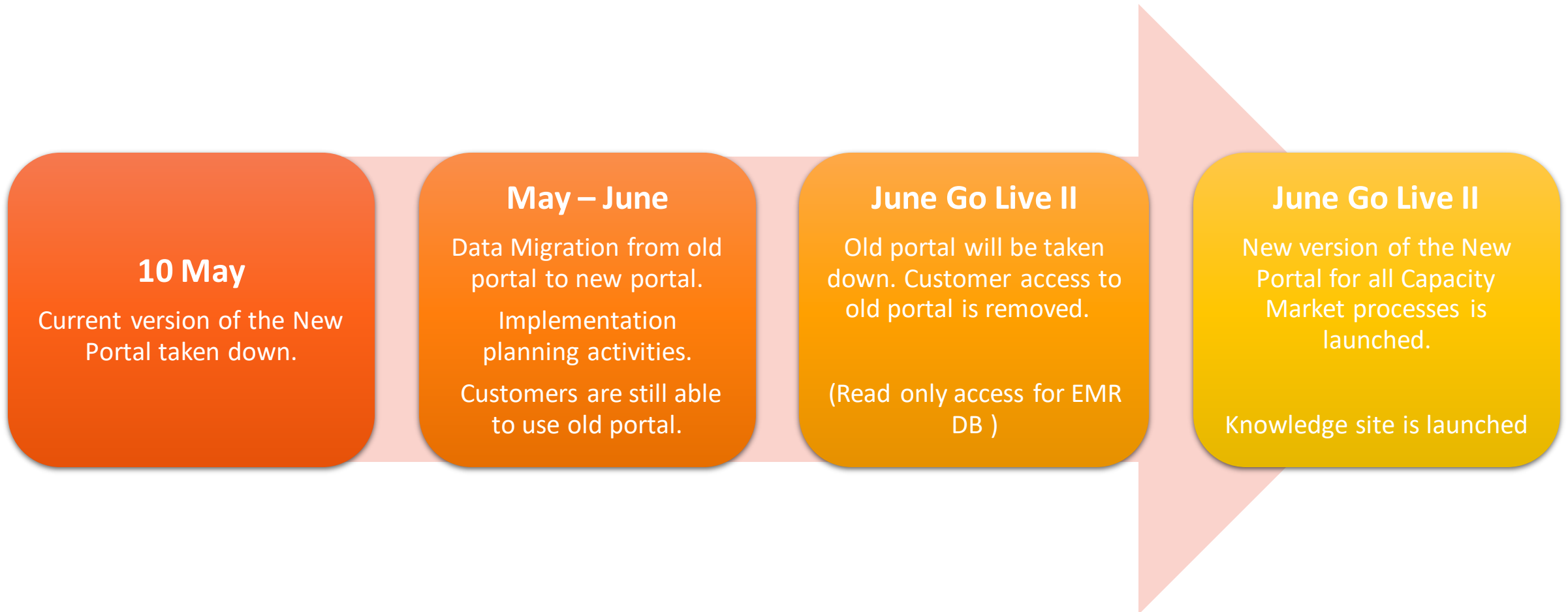
ESO

* Subject to operational plan timeline

EMR DB New Portal Delivery Transition

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- To support the migration of data from the old portal and the Capacity Market functional deployment, we would like to highlight some key dates.



- Ensuring compliance of data (restriction of access and 100% data expected to be migrated will be) was the fundamental building block

All expected data to be migrated

- With the exception of data relating to applications started but never submitted

Restrictions on who can access data

- customer data will only be visible to the users in that specific organisation

Extract, Transform & Load (ETL)

- ~ 250,000 data items
- ~ 60 objects can follow ETL process as part dress rehearsal

Capacity Market Registers (CMR) and Volume Reallocation (VR) Reports and Data Dictionary

- CMRs and VRs contain all data required under CM rules
- All previous CMRs and VR Reports will be available on the new Portal
- Data Dictionary and summary CMR changes will be available for Day 1

Customer data validation

Whilst we have had a thorough and robust test of migrated data we would still strongly encourage customers to review your data post Day 1 and should you have any observations or questions please contact us using the standard contact route of emr@nationalgrideso.com or call on 01926 655300 and the team will prioritise investigating these for you.

Other documents

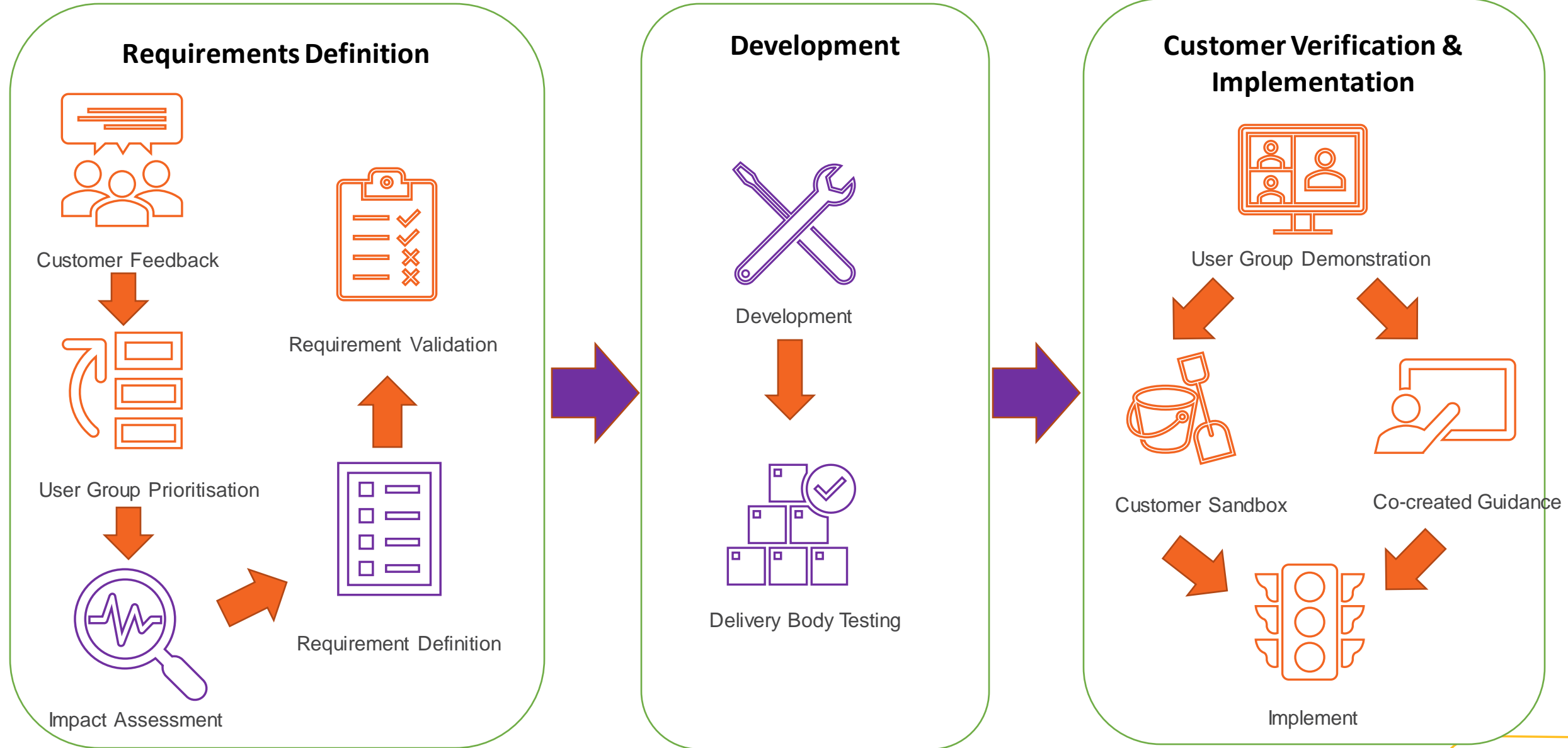
We know that the other documents area in the Legacy Portal was utilised and as part of migration we have checked that these have been migrated but in the event that something is missing please let us know and again we can investigate for you.

Key enhancements delivered based on customer feedback

Process Alignment	Improvements to how information is aligned to the relevant types of Capacity Market Unit to improve customer experience and process flows.
Prequalification Results	A new process has been developed from which customers can see their overall prequalification status and take associated action.
Prequalification Decisions Integration	Clearer relationships introduced between rejection reasons at Prequalification and associated disputes.
Integrated Guidance	Direct links provided from the system process to the associated customer guidance material. Significant improvements in overall guidance with modules created to support customer journeys.
Company Portfolios	Changes to enable customers to link and see all of their related companies under a single logon, with access control managed by Main Administrators.
Electronic Exhibits & Evergreen	Required exhibits now available electronically in the portal to remove administrative failures and enable Director signatures.
Milestone Management	New process implemented for Customers & the Delivery Body to see all outstanding obligations in a single area, with clarity on associated deadlines.
Offline process automation	Reduces manual processes to enable an improved customer interaction.
Ease of custom reporting/dashboards	Reporting and Dashboards can be created and published within the portal
Application Assessment Process	Assessment codes integrated in to the system, with workflow management in the portal to track completion
Dispute Assessments Process	Disputes integrated in to the process linked directly to the relevant Application

Continuous Improvement

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What should I do between Go Live II and Prequalification Application Submission Window

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New Portal Navigation

- Take the opportunity to navigate and familiarise yourself with the New Portal system
- We have a short tutorial video to help guide you through

Integrated Guidance

- Integrated guidance is available throughout the end-to-end process to assist you at every step

Company Details

- Review the company and ensure your user details are up to date
- Use REFRESH button to update the details of companies registered in Companies House
- Email Delivery body to update details for other companies

CMU

- Start setting up new CMUs (if required) and review migrated CMU data

Component

- The CMU status will include: Update Required
- Update components for these CMUs to align with the new regulations
- Manage components to make other edits

Exhibits

- Utilise Built-in Exhibit Generation
- Some exhibits will still need to be completed manually in the initial go-live. Templates are available to be downloaded for these



2024 Delivery Year Readiness

Agreement Management Portal Features	Outstanding Activities <ul style="list-style-type: none">• Ability to highlight key activities by CMU• Clear Deadline Management
	Management Activities <ul style="list-style-type: none">• Management of CMUs, Companies & Overall Portfolio
	Filtering Tool <ul style="list-style-type: none">• Key filtering of portfolio of CMUs• Filter by CMU Type, Tech Class & Outstanding Obligations
	Secure Share Messaging <ul style="list-style-type: none">• Improved messaging platform for EMR Delivery Body to communicate directly with Capacity Providers.

* Be conscious of potential CP373 changes in responsibility of Metering activities to EMRS.

Available Support

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Weekly Updates

We will provide an update approx. every 5 working days during the **Enhanced Support Window**.



From

Sender name

EMR Delivery Body

Email address

emr@comms.nationalgrideso.com




Team		
CM Prequalification Team	01926655300 Option 1	box.emr.prequal@nationalgrideso.com
CM Agreement Management Team	01926655300 Option 2	emr@nationalgrideso.com
CM Auction Team	01926655300 Option 2	emr@nationalgrideso.com

How to Submit an Issue

If you identify what you believe to be a new issue, please submit to EMR using the relevant team's email address (PQ/AM/Auction) and providing the following information:

- The title of the activity within which the issue occurred e.g., Application / Agreement
- The Application/CMU/CAN ID
- PAR (Post Assessment Request) reference (if relevant)
- A high-level description of the issue
- Screenshot(s) of the issue

 Subject to change post transition to NESO

Knowledge Site (Integrated Guidance)

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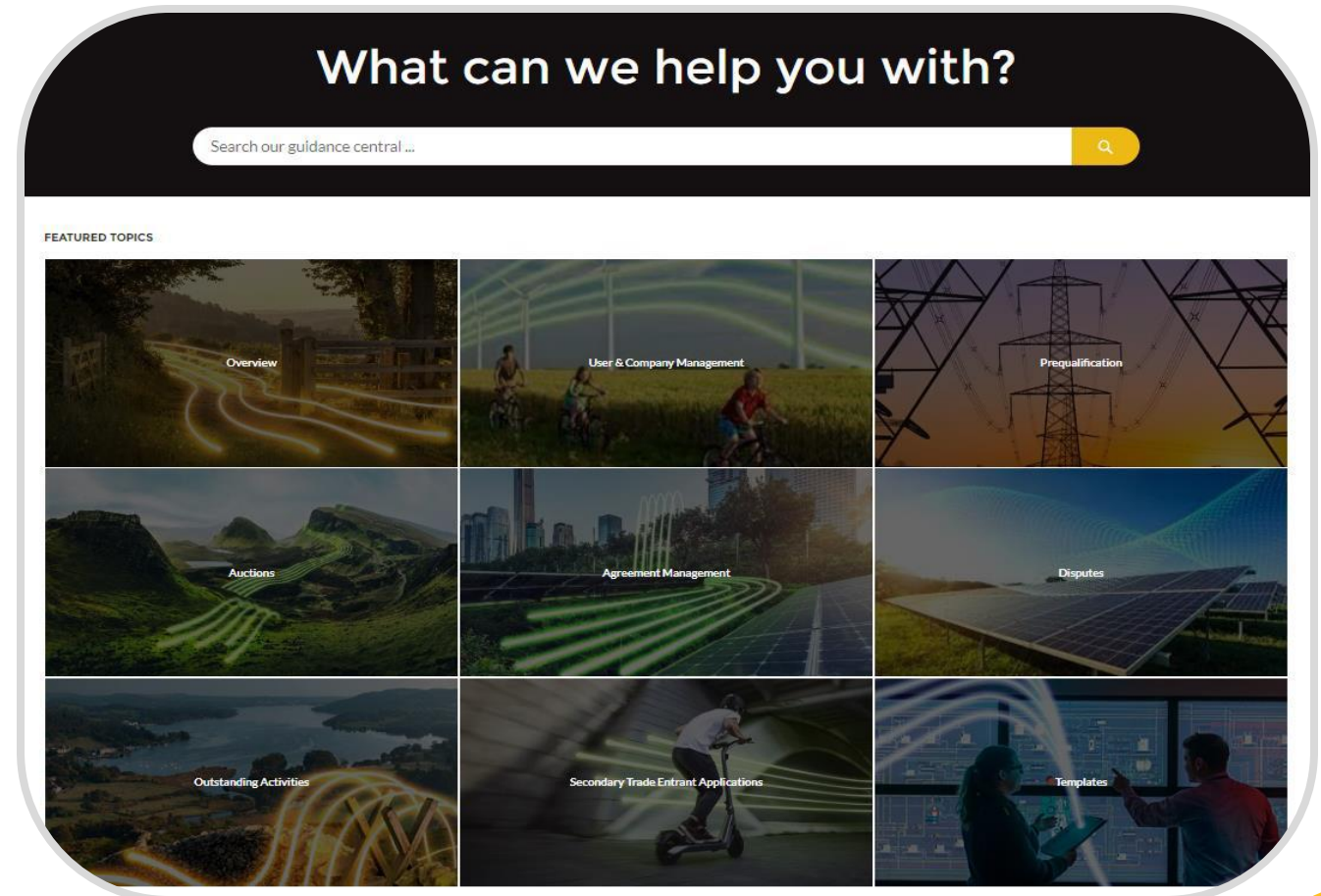
A new website has been established that will host all guidance materials and links to our training videos.

Our new dedicated knowledge website holds all the guidance documents and associated training videos for all the processes required during your journey through the Capacity Market.

We have categorised the guidance into nine separate areas and clicking on the appropriate tile will take you to that collection of guidance material:

- (a) Overview
- (b) User & Company Management
- (c) Prequalification
- (d) Auctions
- (e) Agreement Management
- (f) Disputes
- (g) Outstanding Activities
- (h) Secondary Trade Entrant Applications
- (i) Templates

The guidance is now integrated with the new portal as there are links within the portal pages to take you either to this landing page or to a specific topic tile



Questions & Feedback

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An aerial photograph of a river with white water rapids. The water is a mix of dark green and white foam. Several bright blue lightning bolts are striking the water, creating a dramatic effect. The text "Thank you for your time" is overlaid in white on the lower half of the image.

Thank you for your time