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EMR Delivery Body New Portal User Group

Requirement Playback & Enhancement Prioritisation Result

16 January 2025

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House Keeping

 **Microphones on mute**

 **Cameras off**

 **The session will be recorded**

 **Slido event code [#8929978](#)**

Public

• **Slido #8929978** •

Agenda

1. Confirmation on Q4 Portal Delivery
2. Customer Identity and Access Management (CIAM) – Requirement Playback
3. Application Validation – Requirement Playback
4. Emissions Register – confirmation of regulatory change
5. Portal Feedback Summary + Prioritisation
6. Next Steps

Confirmation on Q4 Portal Delivery

Customer Identity and Access Management (CIAM)

- BP2 Milestone – *'Deliver planned integration of EMR within the Digital Engagement Platform'*
- Ensures secure access to NESO Portal by authorised individuals
- Simplifies user experience by allowing a customer to use a single set of login details for various services

PQ Application Validation

- Provides the opportunity for customers to review their PQ Application for any incomplete and incorrect fields.
- Condition based validations built considering the interdependent fields.

Emissions Register

- The Emission Register will generate component data where the fuel type is declared as fossil fuel.
- The register will publish data from valid CANs that include all components with declared fossil fuels.
- The Emission Register will be published quarterly for all auctions post PQ-2024.

DSR Component

- This technical enhancement will enable customers and Delivery Body users to manage up to 50,000 DSR components.

Process Adoption

- Issue & Resolution
- Enhanced process using operational data in test environment

Customer Identity and Access Management (CIAM)

Feature Description

The CIAM feature offers a single access point for all NESO systems and external products, ensuring secure and direct access. Users can register for multiple NESO products with the same email, without a separate user registrations process for the EMR portal.

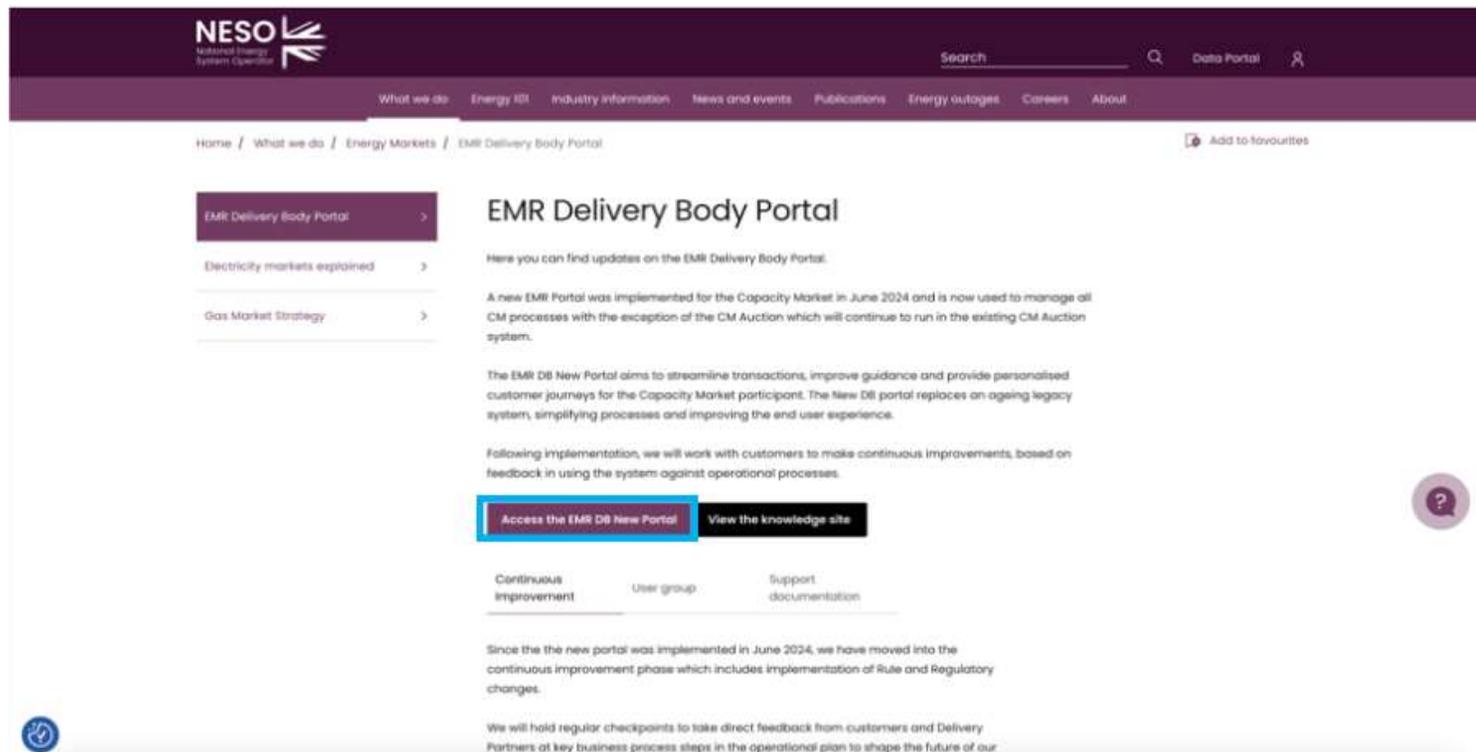
As part of the Digital Engagement Platform (DEP) project, this feature enhances accessibility for external customers by enabling a single login for multiple NESO portals. It will replace the current login and Salesforce authentication process for the EMR delivery body portal with a unique multifactor authentication using email and mobile number across multiple NESO products.

High Level Requirements Proposed

- Integrating EMR users into a unified user sign-on registration and login process on the NESO portal.
- Enable the registration of EMR users as NESO Portal users to ensure continuous access to the EMR portal and other services.
- Move from Salesforce login authentication to new multi-factor authentication using email and mobile number.

The process of accessing the EMR Delivery body portal begins on the NESO website upon deployment of the feature, which directs customers to the NESO Single Sign-In page.

There are **no changes** to the login page for existing EMR portal users; it will redirect to the NESO Single Sign-In page.



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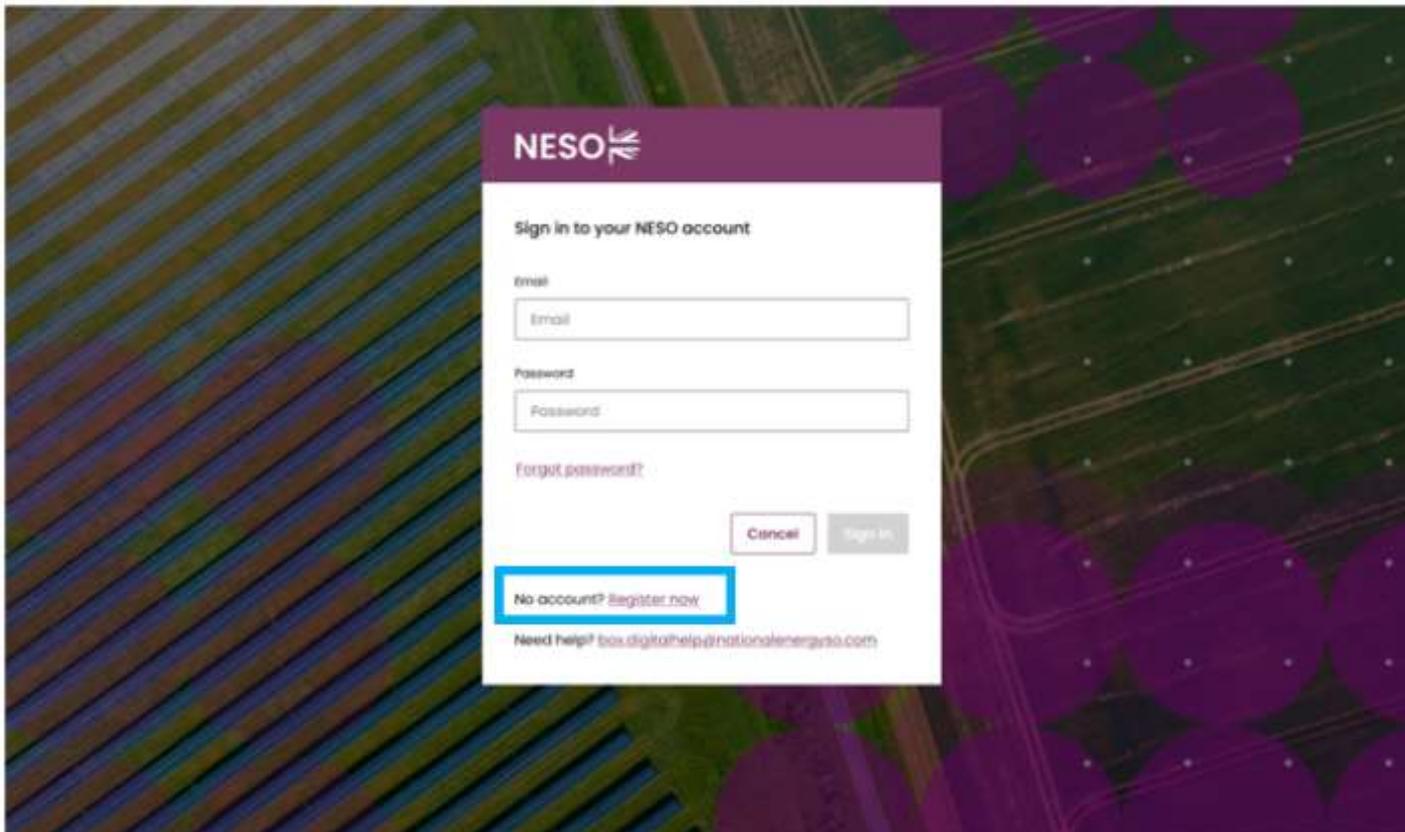
On the NESO sign-in page, users can:

1. log in with Single Sign-On for existing NESO accounts
2. register for a new NESO account by Clicking Continue to registration.

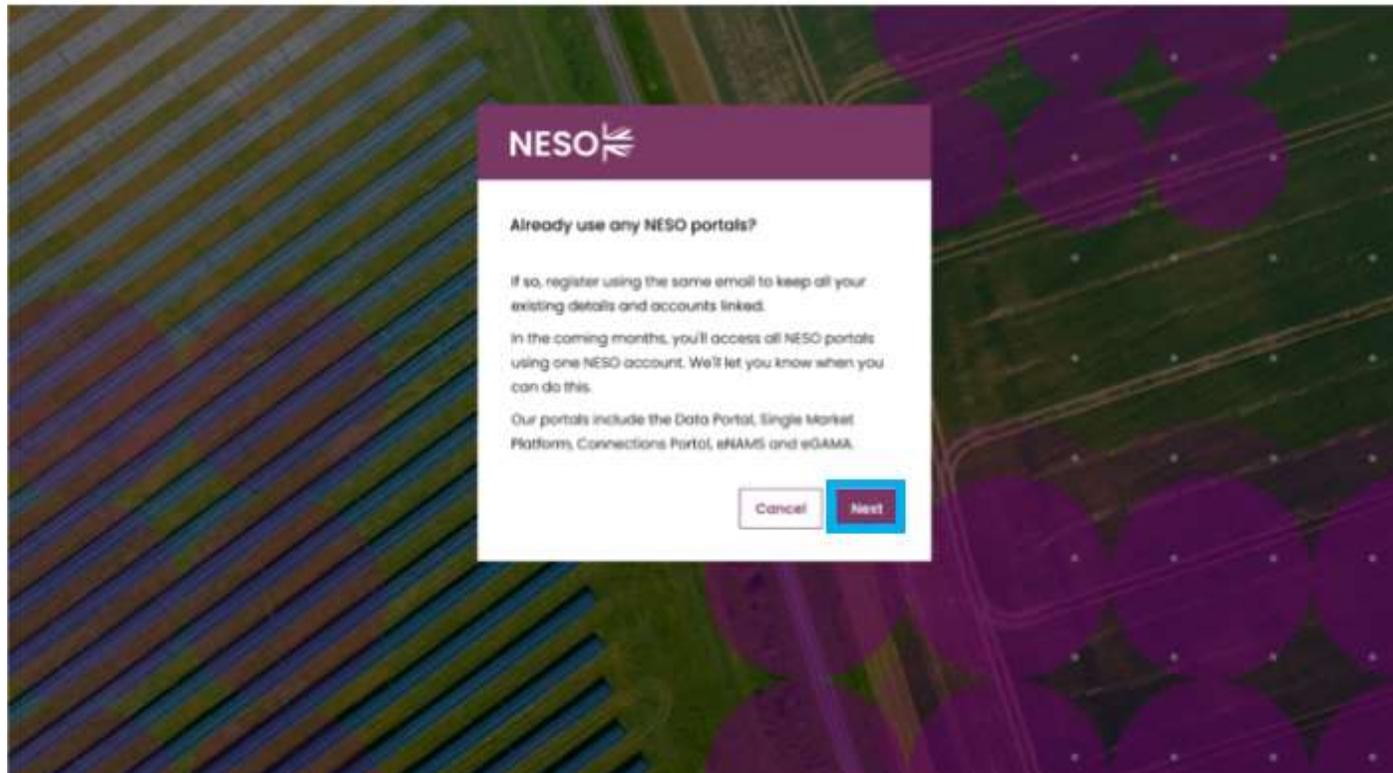
Users can also view EMR Regulatory Reports and Guidance without logging into the EMR portal.



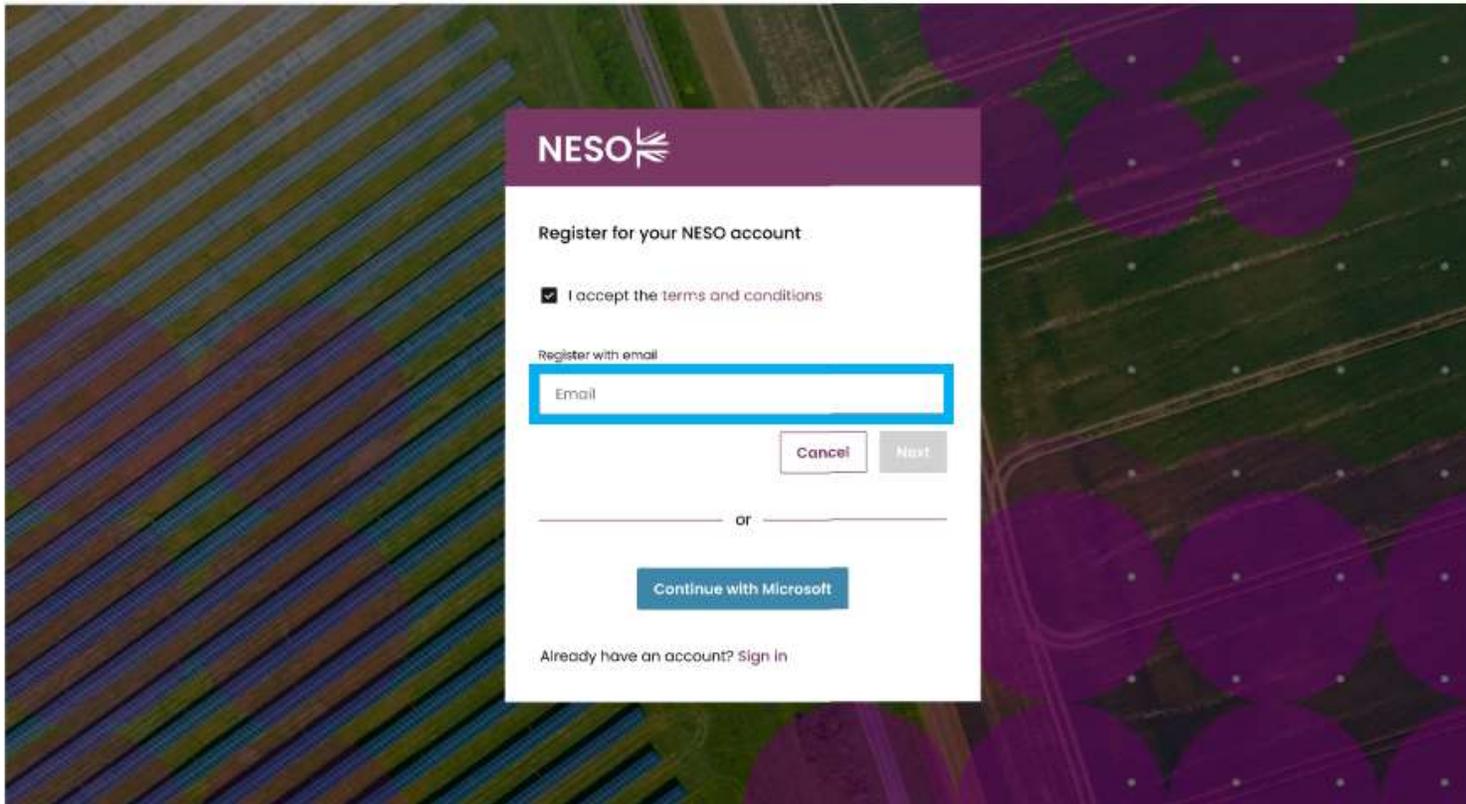
New users who do not have a NESO account can click "Continue registration" and select "Register Now" to create an account. Existing users with a NESO account can sign in directly using their email and password.



Upon clicking "Register Now", the new user will be directed to the screen below, where they will be asked to register using their email to keep all other NESO portal accounts linked.



To Create a NESO account User will be required to register with their email address



After entering an email ID, the next screen prompts the user to add their first name, last name, and password.

NESO

Register and create an NESO account

Complete all fields

First name
Ellen

Last name
Ripley

Password
GJ7gojA* ✓

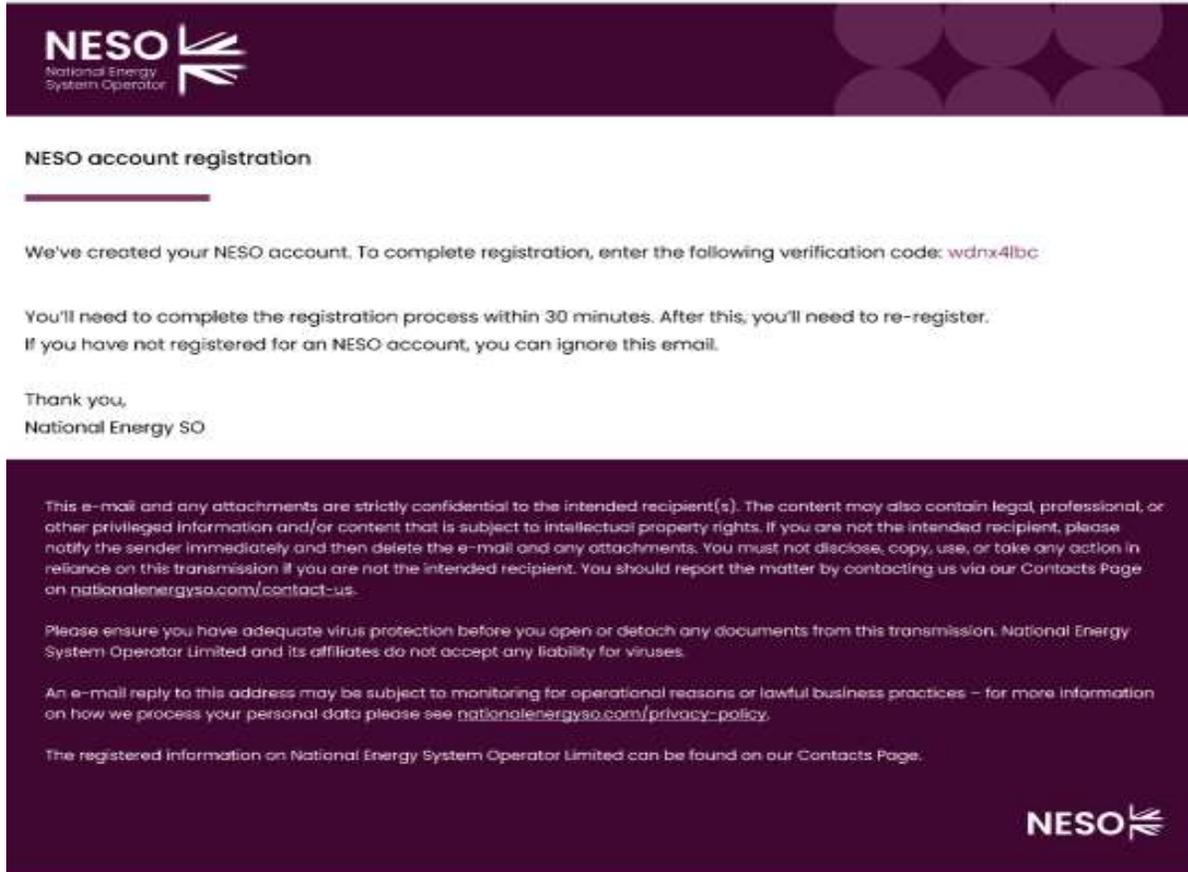
Confirm password
***** ✓

Minimum password requirements:

- 8 characters minimum
- 1 lowercase character
- 1 number
- 1 UPPERCASE character
- 1 special character

Cancel Create account

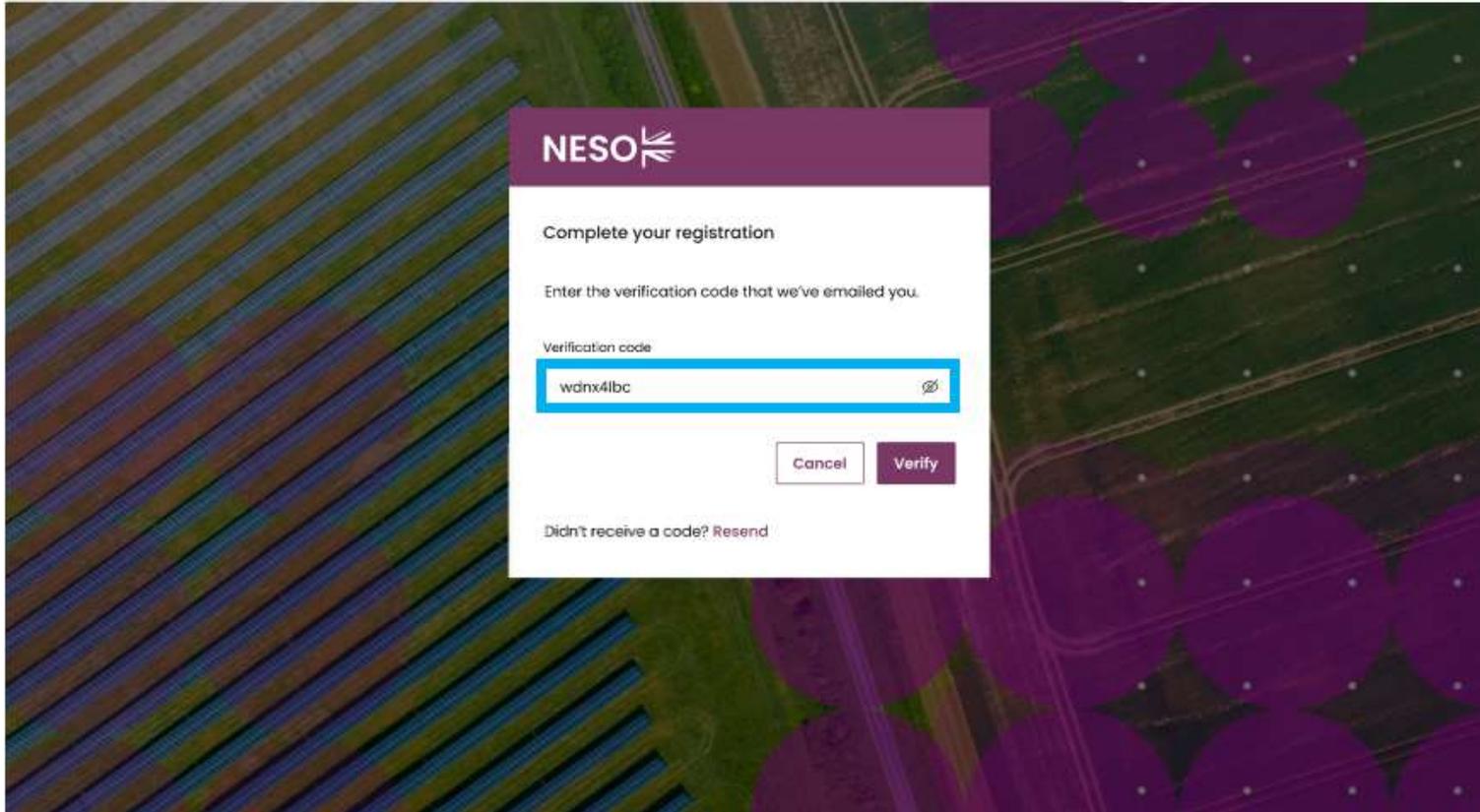
After registering your NESO account, you'll receive a verification code at the provided email address.



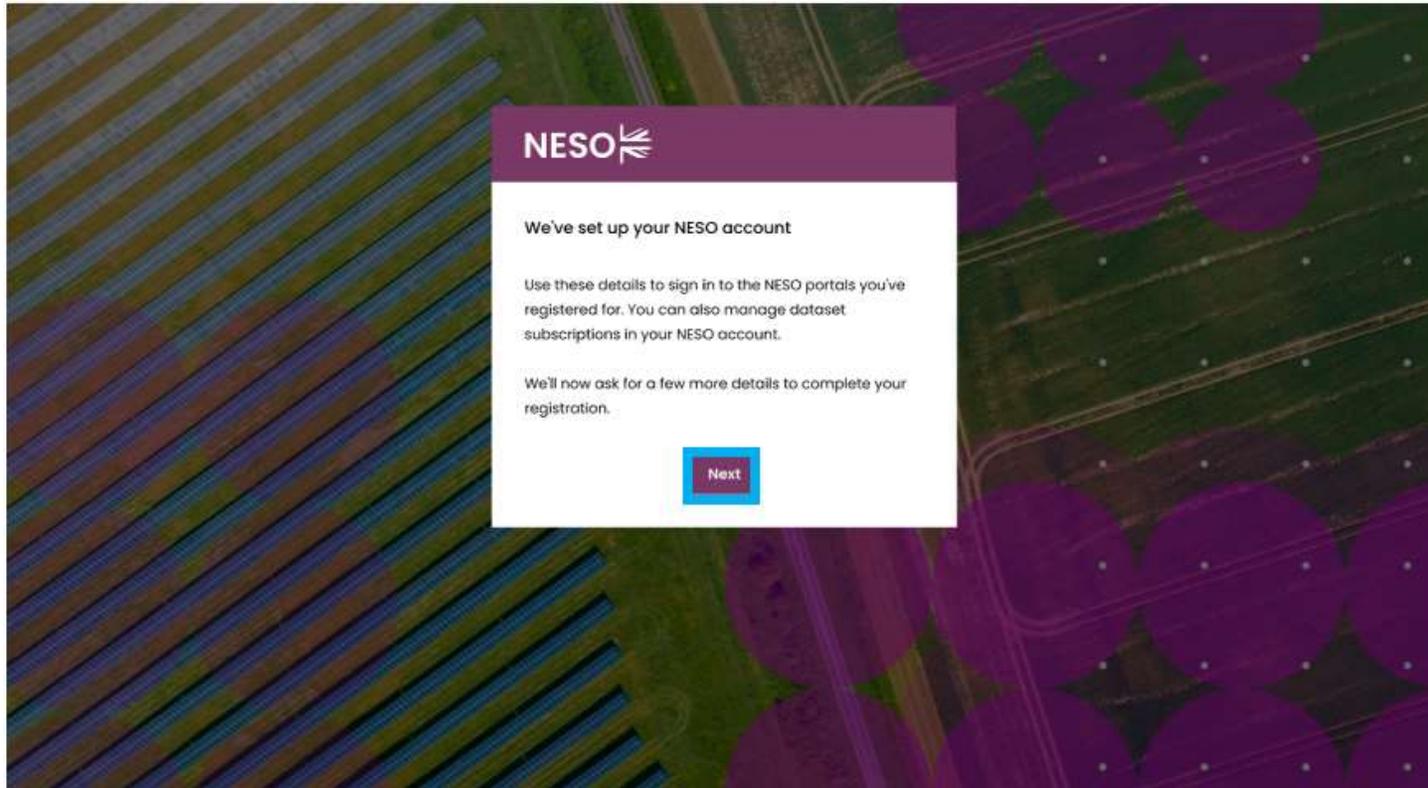
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User will be able to complete registration by filling out the verification code sent via email.



Upon which a pop-up message will be displayed to confirm a NESO account has been set up.

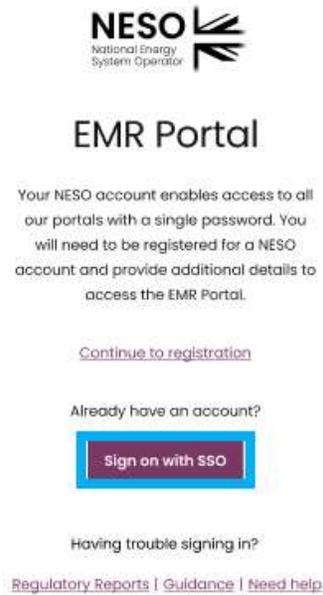


After completing email verification, this screen prompts the user to create their mobile number authentication, which will be used to receive another verification code via SMS. This section is optional and can be skipped.

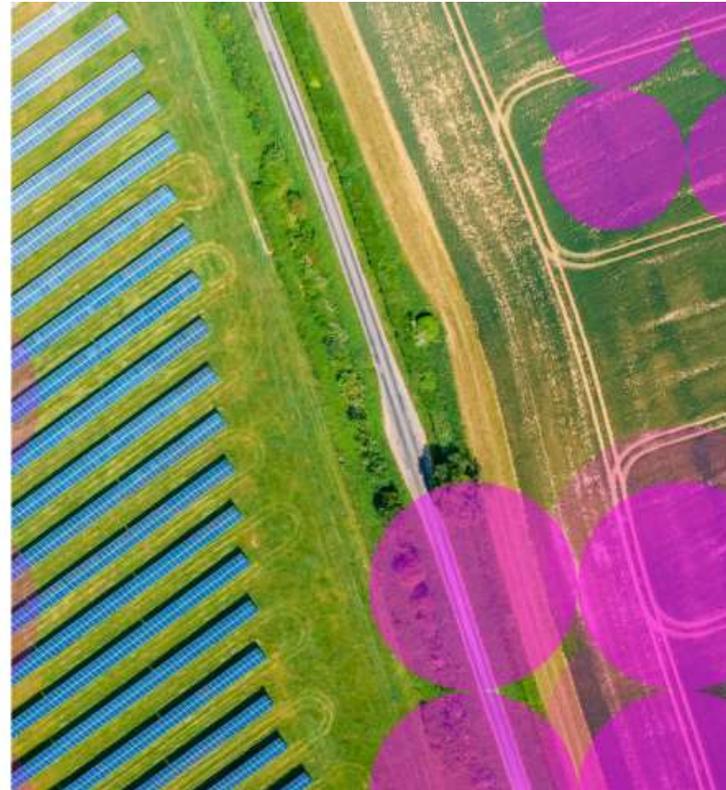
The screenshot shows a mobile sign-in setup screen for NESO. At the top is the NESO logo. Below it, the heading is "Set up secure sign-in". The text reads: "Enter your mobile number if you want to register it for secure authentication." and "If you skip this step, we'll send your verification code to your registered email address next time you sign in." There is a "Select your country" dropdown menu currently set to "United Kingdom +44". Below that is a "Mobile number" input field. At the bottom are "Cancel" and "Submit" buttons, and a link that says "Skip mobile verification".

The screenshot shows a mobile verification code screen for NESO. At the top is the NESO logo. Below it, the heading is "Enter your verification code". The text reads: "We've sent a code to *****498". There is a "Verification code" input field with a "Verification code" placeholder and a small icon on the right. Below the input field are "Cancel" and "Verify" buttons. At the bottom, there is a link that says "Didn't receive a code? Resend".

After finishing the NESO account registration, users will be categorized as existing NESO account holders. They can log in to their NESO and EMR accounts from the landing page by clicking 'Sign on with SSO'.



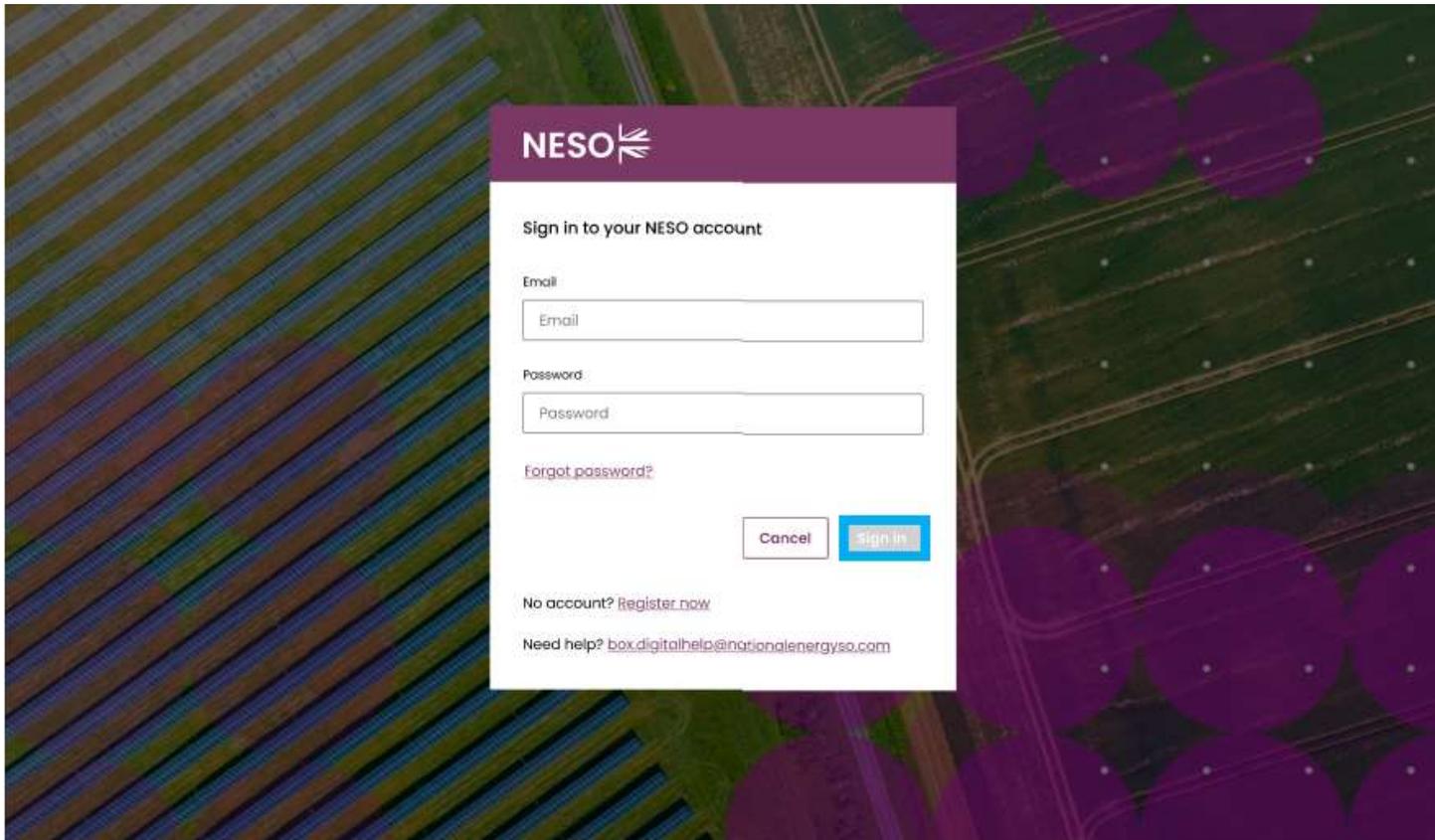
The screenshot shows the NESO EMR Portal landing page. At the top is the NESO National Energy System Operator logo. Below it is the heading "EMR Portal". A paragraph explains that a NESO account provides access to all portals with a single password and that users need to be registered for a NESO account to access the EMR Portal. There are two main options: "Continue to registration" (a link) and "Already have an account?" (a heading) with a prominent "Sign on with SSO" button. At the bottom, there is a heading "Having trouble signing in?" and a footer with links for "Regulatory Reports", "Guidance", and "Need help".



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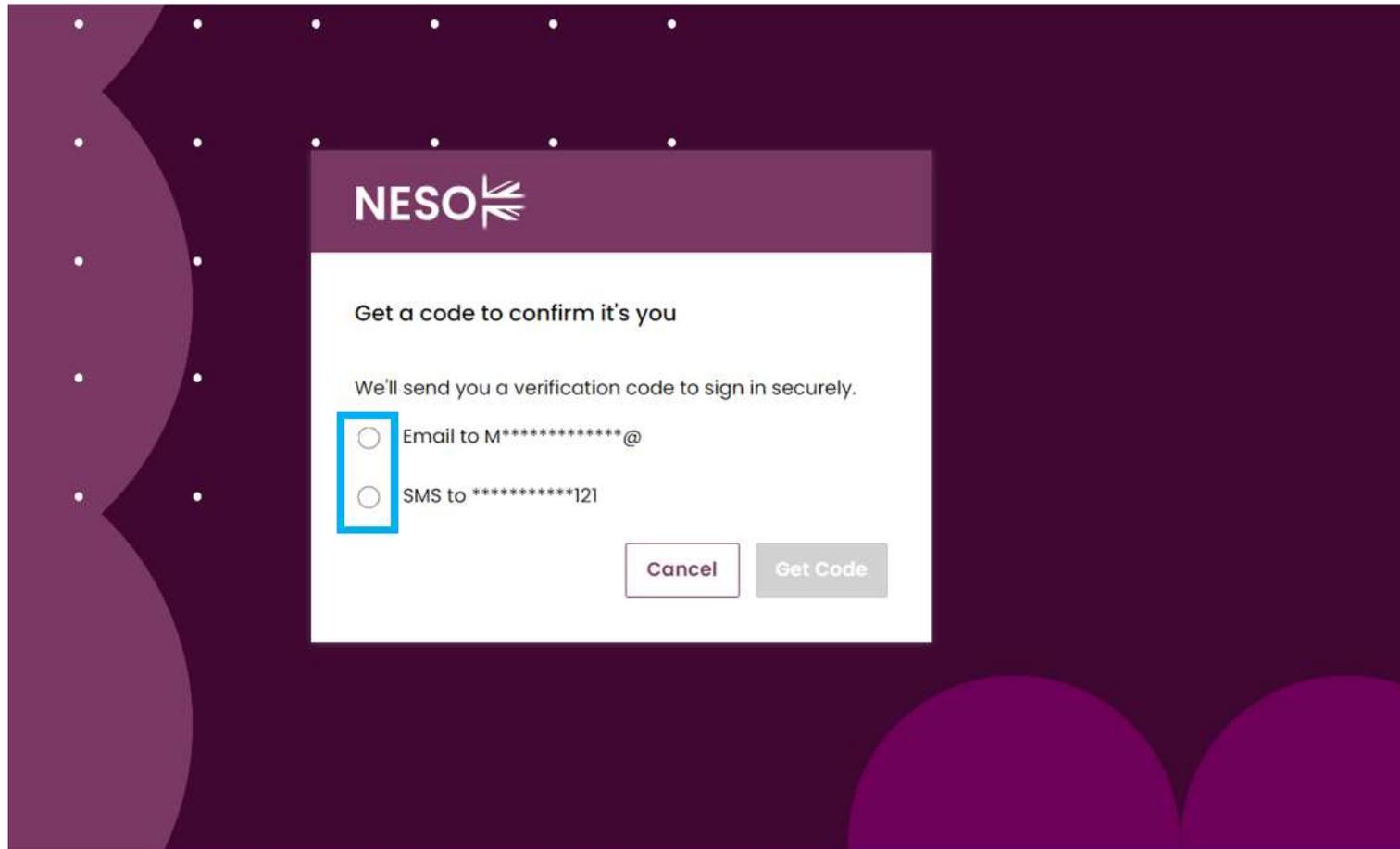
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Which will direct user to sign into your NESO account by adding email and Password

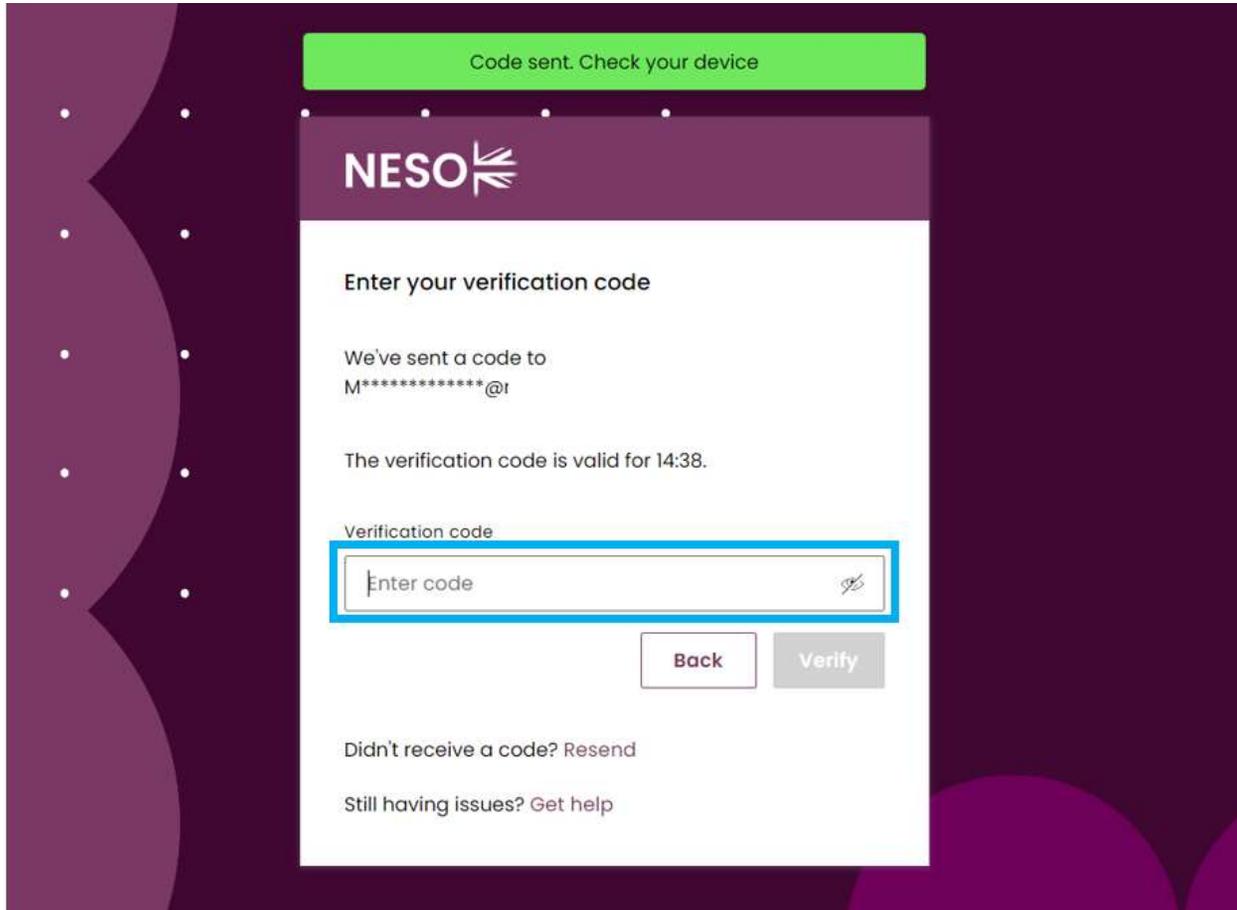


The image shows a screenshot of a web form for signing into a NESO account. The form is titled "Sign in to your NESO account" and features the NESO logo at the top left. It includes two input fields: "Email" and "Password". Below the "Password" field is a link for "Forgot password?". At the bottom of the form, there are two buttons: "Cancel" and "Sign in". Below the buttons, there are two links: "No account? Register now" and "Need help? box.digitalhelp@nationalenergyiso.com". The background of the form is a dark purple gradient with a pattern of diagonal lines and circles.

After entering sign-in credentials, users will receive a verification code via email or SMS.



After the verification code is entered, access to the EMR portal will be granted.



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	Apply
[Title]	T-4	2027	Apply
[Title]	T-4	2027	Apply
2022-23 T-1	T-1	2023	Apply
[Title]	T-4	2027	Apply

Secondary Trade Entrant

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

Application Validation

Feature Description

This feature will allow Users to view validation warnings when field values are not provided, or a file is not uploaded. By reviewing the validation warnings, this will give the User an indication of any missing/in some instances the incorrect information, so should minimise the chances of Application rejection.

Customer Feedback Considered

- Users found the Pre-submission validation emails useful, so using this feature provides Users the opportunity to carry out the validations first-hand.
- The Application Validation feature works for Secondary Trade Entrant Applications as well and not just Prequalification Applications.
- Feedback from recent portal survey – *'In the old portal, if you didn't answer a question it was highlighted. It's easier to miss things out in the new portal.'*
- Feedback from recent portal survey – *'The structure of the Application pages with 'layers' on each page makes it a little cumbersome to check that all items have been completed. Could also have flags when saving that necessary items have not been completed.'*

High Level Requirements Proposed

- A User with read & write privileges will have the option to validate the Application information before submitting an Application.
- If the system identifies any issues, then the User will see validation warnings informing them of the possible issue(s) (i.e. Exhibit ZB file upload missing), which would give the User the opportunity to correct the issue before submitting the Application.



My EMR / Manage T-1 2022-23

Filter Company

Filter Application Status

Filter CMU Type

- Display All -

- Display All -

- Display All -

Search for CMU ID or Name



Status ↓	CMU ID ↓	Application ID ↓	CMU Type ↓	Company Name ↓	Date Updated	Updated By	More
Submitted	AB73WV	A-T-1-2023-AB73WV-00001	Existing Generating	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	⋮ Manage Application
Created	AB73WV	A-T-1-2023-AB73WV-00001	Existing Generating	Company Name Spread over two lines	XX/XX/XXXX	Name Name Surname	⋮

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Sli.do #

My EMR / My Applications & Opt-out Notification Page / Manage Application

Couame New Build Generating	Status Created	Application ID A-T-4-2050-Couame-00001	Applicant Company APPLE ACADEMY LIMITED	Quit	Save	Submit Application	Delete
---------------------------------------	--------------------------	--	---	----------------------	----------------------	------------------------------------	------------------------

We recommend you Validate your inputs before submitting the Application.

[Show Validation](#)

Application Details - Review

Application Questions

Declarations

Emissions

Company APPLE ACADEMY LIMITED	View
CMU Type New Build Generating	View
Components 2 Components	View
Connection Capacity Details Total Connection Capacity (MW)	Calculate

We recommend you Validate your inputs before submitting the Application.

☰ Hide Validation

Application Details - Review

Application Questions

Declarations

Emissions

Company

APPLE ACADEMY LIMITED

View

CMU Type

New Build Generating

View

Components

2 Components

View

Connection Capacity Details

Total Connection Capacity (MW)

Anticipated De-Rated Connection Capacity (MW)

Calculate

Validation Warnings

Below are the validation warnings from your Application.

Please note that the validation process is not the same as an Application assessment, therefore, the absence of the validation warnings or errors does not guarantee the Application's success.

Filter Section

- Display All -

↻ Revalidate

Acknowledge Low Carbon Exclusion & Low Carbon Grant Status

This is a mandatory declaration and should be selected.

Applicant Status

This is a mandatory field and should not be left blank.

Back-Feed: Earliest Date

This is a mandatory field and should not be left blank.

Back-Feed: Latest Date

This is a mandatory field and should not be left blank.

Multi-Unit Sites	v	
Financial Commitment Milestone	v	
Construction Plan	v	
Construction Plan Summary Information Please provide a description of the nature of the construction, re-powering or refurbishment works to be undertaken.		
<input type="text"/>		
Characters Left: 1000/1000		
Construction Milestones		
Signing of EPC / Equivalent Major Contract	Earliest Date DD/MM/YYYY	Latest Date DD/MM/YYYY
Commencement of Construction Work	Earliest Date DD/MM/YYYY	Latest Date DD/MM/YYYY

the Application's success.

Filter Section
Construction Plan

Back-Feed: Earliest Date
This is a mandatory field and should not be left blank.

Back-Feed: Latest Date
This is a mandatory field and should not be left blank.

Commencement of Construction Work: Earliest Date
This is a mandatory field and should not be left blank.

Commencement of Construction Work: Latest Date
This is a mandatory field and should not be left blank.

Construction Plan Declarations
This is a mandatory declaration and should be selected.

Construction Plan Summary Information
This is a mandatory field and should not be left blank.

First Firing: Earliest Date
This is a mandatory field and should not be left blank.

First Firing: Latest Date
This is a mandatory field and should not be left blank.

1 - 8 of 16 items



Construction Plan v

Construction Plan Summary Information
Please provide a description of the nature of the construction, re-powering or refurbishment works to be undertaken.

Characters Left: 1000/1000

Construction Milestones

	Earliest Date	Latest Date
Signing of EPC / Equivalent Major Contract	17 Jan 2025	31 Dec 2024
Commencement of Construction Work	9 Jan 2025	31 Dec 2024

Back-Feed
The earliest date must be prior to the latest date.

Commencement of Construction Work
The earliest date must be prior to the latest date.

Construction Plan Declarations
This is a mandatory declaration and should be selected.

Construction Plan Summary Information
This is a mandatory field and should not be left blank.

First Firing: Earliest Date
This is a mandatory field and should not be left blank.

First Firing: Latest Date
This is a mandatory field and should not be left blank.

Gas / Steam Turbine Delivery (Of any Generator Dependant on Technology): Earliest Date
This is a mandatory field and should not be left blank.

Gas / Steam Turbine Delivery (Of any Generator Dependant on Technology): Latest Date
This is a mandatory field and should not be left blank.

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Moqwhk New Build Generating	Status Withdrawn	Application ID A-T-4-2050-Moqwhk-00001	Applicant Company APPLE ACADEMY LIMITED
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[Quit](#) [Save](#) [Submit Application](#) [Delete](#)

We recommend you Validate your inputs before submitting the Application.

[Hide Validation](#)

Application Details - Review

Application Questions

Declarations

Emissions

Standard Application Questions

▼

Applicant Status

Legal Owner

▼

Covering Letter

Supporting documentation for your Prequalification application.

[Upload Document](#)

Validation Warnings

Below are the validation warnings from your Application.

Please note that the validation process is not the same as an Application assessment, therefore, the absence of the validation warnings or errors does not guarantee the Application's success.

Filter Section

Standard Ap... ▼

[Revalidate](#)

There are no validation warnings in this section.

The screenshot displays the NESO web application interface. At the top, a navigation bar includes 'My EMR', 'User Management', 'Company Management', 'CMUs & Components', 'Dispute', and 'Guidance'. The NESO logo and 'Electricity Market Reform Delivery Body' are on the right. The main page title is 'My EMR / My Applications & Opt-out Notification Page / Manage Application'. A modal dialog box titled 'Submit Application' is centered, containing the following text: 'We recommend validating your Application before submitting to identify possible issues. Applications with incomplete details may be rejected by the Delivery Body.' and 'Once Submitted, you will still have the option to update an Application by selecting Withdraw and re-submitting the updated Application up until the closure of the Prequalification Submission Window.' The dialog has 'Cancel' and 'Submit Application' buttons. In the background, the 'Manage Application' page shows a table with columns 'Couame' and 'Status', a 'Save' button, a 'Submit Application' button, and a 'Delete' button. A 'Show Validation' link is also visible. Below the table, there are sections for 'Application Details - Review', 'Company' (APPLE ACADEMY LIMITED), and 'CMU Type' (New Build Generating), each with a 'View' link.

Key Amendments to CM Rules – Emissions Reporting

The new rules are a directive from government, aimed at improving transparency and compliance with environmental standards. Also, to ensure that the data is accessible for stakeholders.

What's Changing?

- Introduction of the Capacity Market Emissions Chapter.
- New tracking requirements for fossil fuel emissions of CMUs.

Delivery Body's Role:

- Establish and maintain the **Capacity Market Emissions Chapter** in line with the new rules.

Key Features

Data Collection and Display:

- Record emissions data for fossil fuel components in CMUs (installed capacity of 1MW and above).
- Include metrics such as the Fossil Fuel Emissions, Yearly Emissions, Formula used and Fuel types. This will be as declared on a verified Exhibit ZA.
- Calculate Weighted Emissions Intensity using formula provided in the rules.
- Record Independent Emissions Verifier declarations on Exhibit ZA (Part 9.1(a) or (b) - unqualified or qualified confirmation).

Reporting Frequency:

- Only CMUs awarded a CM Agreement will have entries.
- Quarterly reporting – emissions data updated every 3 months.
- First iteration of the Emissions Chapter expected in April.

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Portal Survey Update

The Portal Survey was sent to all active Capacity Market Portal Users.

The Portal Survey was open for 4 weeks from 15 October 2024 to 11 November 2024.

Surveys completed - 36

Organisations represented - 32

Responders represent approximately 50% of active CM agreement capacity

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Survey Summary Output

How would you rate the performance of the New Portal	Median Score - 8
Please rate your experience of using the new Knowledge Site	Median Score - 8
How would you rate your overall experience	Median Score - 7.5

Challenges & Improvements

71 separate comments have been merged into 10 different areas of consolidated requirements

For more details of the Survey Results, please head to the 'Continuous Improvement' section of the EMR DB Portal website.

We need your help to prioritise

We have taken the overall feedback customers provided in the survey and grouped them together into logical requirement areas. We are now keen to make sure the **most valuable enhancements for you are prioritised**. To help us do this, we need your input on the area

Each area will require a prioritisation value. We are also looking for the top three areas of importance.

We intend to distribute a survey link to the wider customer community.

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A low value represents a minor user improvement

A high value represents significant process enhancement



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Summary of the prioritisation survey

In total, we received **12 Responses**.

Value

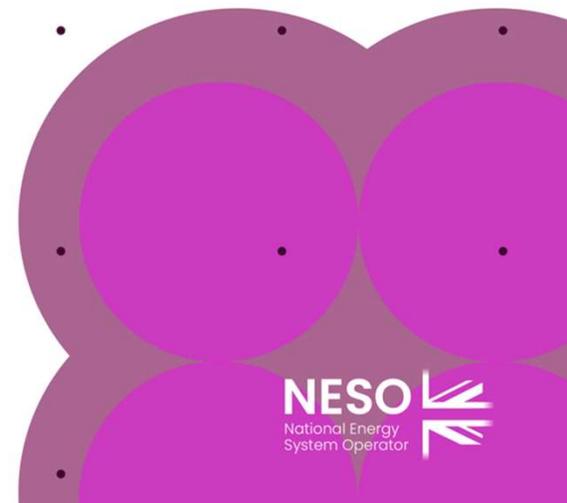
We took the mean (average) based on the number provided for each area of the portal which we asked customers to provide a value of 1 – 5 against.

1 = low value, 5 = high value.

Importance

We decided to use the mode value to summarise the overall ranking positions. This was because we wanted to view the most commonly applied ranking position.

The tables that follow show the order of areas of the portal which represent the most valued, starting with the highest. We have included the associated mode value for the same area of the portal.



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Customer Enhancement Prioritisation

Enhancements which were prioritised as most valuable. Please see 'Further Information' to view areas of the portal and the associated scope described within the survey

Area of Portal	Value (average)	Importance (mode)
PQ Application Process	4.36	1
Portal Notifications & Warnings	4.27	8
User Interface improvements / Portal Navigation & Layout	4.27	4
CMU Management	4.09	3

Next Steps – Internal impact and capacity assessments to understand deliverability of additional enhancements for Q4 .

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Customer Enhancement Prioritisation

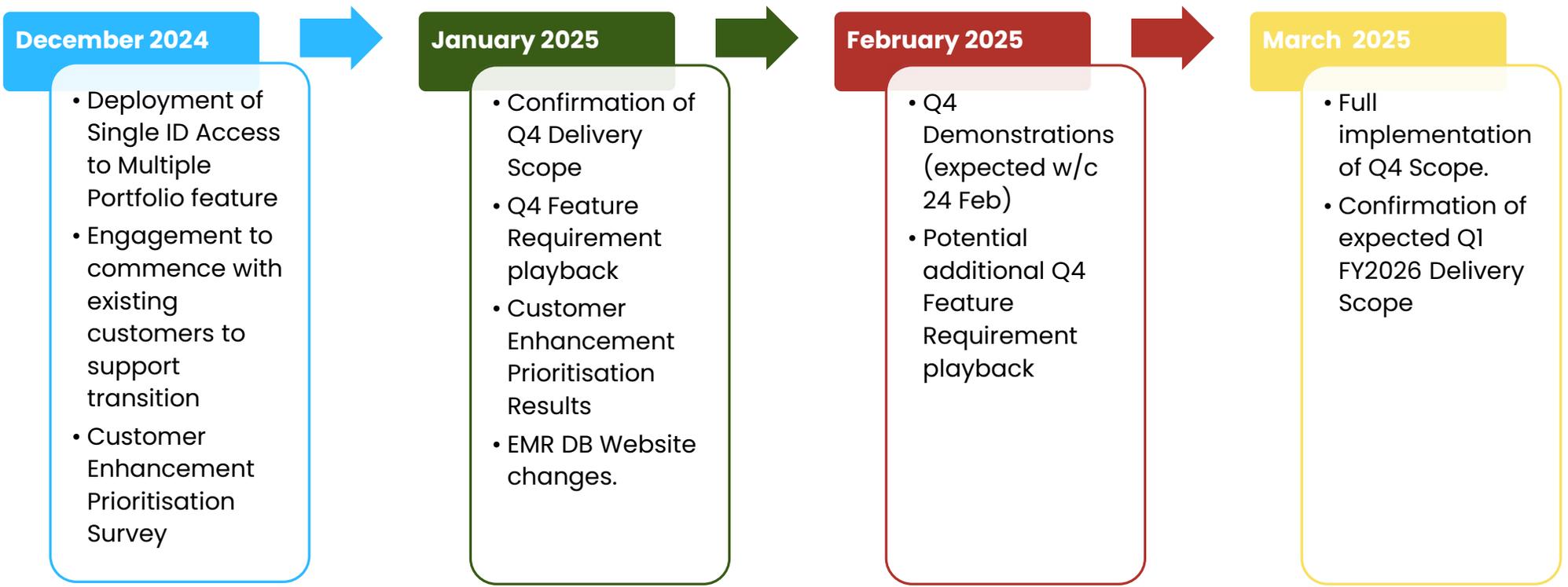
Enhancements which were prioritised as less valuable. Please see 'Further Information' to view areas of the portal and the associated scope described within the survey

Area of Portal	Value (average)	Rank (mode)
Data Exports	3.91	6
Portal Timeout	3.73	10
Filtering options & memory	3.45	7
Outstanding Activities Function	3.27	9
User Interface improvements / Bulk Upload functionality	3.00	2
Digital Signatures	3.00	8

Next Steps – Internal impact and capacity assessments to understand deliverability of additional enhancements for Q4 .

What's coming next?

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Thank you for your time

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Further Information

Requirement transparency

Below is the list of the areas of the portal and the associated scope described within the survey. **The scope item in purple is matched to the PQ Application Validation feature for Q4 delivery.**



PQ Application Process

- Click rate reduction – have fewer ‘clicks’ to complete application processes
- Only have questions showing that are relevant to our applications
- Be able to upload zip files within the emissions section of the Pre-Qualification application, to upload emissions verification documents, serial plates and calculation sheets in bulk
- Have all the questions visible on the same page for each section rather than in a ‘nested’ format



Portal Notifications & Warnings

- Have consistency in notification recipients. It would be easier if notifications went to all user types
- Remove old CMUs from portal warning notifications
- **Have non-completion warnings if questions haven’t been answered or documents not uploaded**
- Have more information in the e mail notifications, such as when receiving updates on a prequal submission status change, it would be very helpful to outline the latest status in the email

Requirement transparency

Below is the list of the areas of the portal and the associated scope described within the survey.

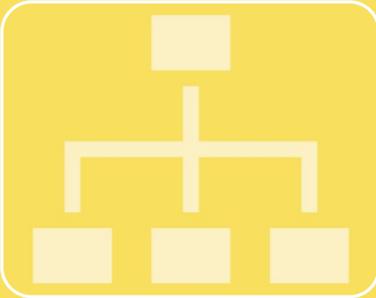
User Interface improvements / Portal Navigation & Layout

- A search bar available on the screen to help find areas quicker and easier,
- The ability to open pages on additional tabs
- Additional interlinked functionality. E.g. moving directly from the CMU page to a linked application
- Capability to access CMU Components when viewing the CMU
- Return to page instead of defaulting back to the My CMU screen
- Easier to see attachments
- De-cluttering pages, i.e Company page
- Formatting issues & inconsistencies
- Colour scheme adjustments to enhance ease of use, particularly for first-time users entering the market

Requirement transparency

Below is the list of the areas of the portal and the associated scope described within the survey.

CMU Management



- To clone a CMU from New Build to Existing, or from Unproven to Proven rather than start a new one from scratch
- To have the CMU derated capacity or connected capacity displayed on the CMU screen as opposed to going into each component which is an issue with multi component CMUs
- The ability to create CMUs & Components in bulk rather than manually add each one individually
- Access a component via the CMU

Data Exports



- Export/download Applications for checking prior to final submission
- Export/download Applications after submission
- Have a reporting function to export data, in CSV format, from all areas including Applications, Results, Agreements awarded, Disputes, Capacity Commitments, CMUs & Components
- submission status change, it would be very helpful to outline the latest status in the email

Requirement transparency

Below is the list of the areas of the portal and the associated scope described within the survey.



Portal Timeout

- Have a longer period before the portal automatically logs me out for inactivity.
- Allows more time to consult with guidance documents on topics



Filtering options & memory

- Increased filtering options for CMU/Application/Agreement
- Retaining filtering when navigating. i.e the ability to retain the filter on the company that a user has selected to avoid resetting when moving back and forth between CMUs.



Outstanding Activities Function

- Be able to delete / archive uncompleted trades and other non-relevant items to 'cleanse' the Outstanding Activities tab

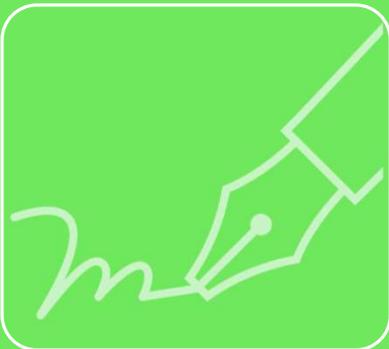
Requirement transparency

Below is the list of the areas of the portal and the associated scope described within the survey.



User Interface improvements / Bulk Upload functionality

- Functionality that allows the user to upload lots of information required in the portal. i.e. bulk upload



Digital Signatures

- The ability to recall or amend a document out for signature rather than having to cancel and regenerate
- Have a longer Conga signature request expiry limit (currently set at one week)
- Have an electronic signature process that doesn't involve needing Directors' phone details as they can be unwilling/slow to share such details and then they must
- access passcodes to complete the transaction
- A two-stage process to signing off exhibits