

Public

Consultant Access User Guide

External Process Guide
23/10/2024 v1

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Applying as a consultant

1. When you are logged in as a consultant, new applications can be made on behalf of client or you can apply for your organisation.

New application

Provide initial information for this new application.

If you need to make an application for another organisation [raise a general query](#) to have it created.

Who are you applying for?

* Consultancy

- I am applying for my organisation
- I am applying for a client

2. When applying for your own organisation, Application type, Connection location and Project name must be filled in.

Provide initial information for this new application.

If you need to make an application for another organisation [raise a general query](#) to have it created.

Who are you applying for?

* Consultancy

- I am applying for my organisation
- I am applying for a client

* Application type

Select application type.

* Connection location

- England & Wales
- Scotland

* Project name

Cancel

Create

- When applying on behalf of client, the applying organisation must be added. This will be a list of companies that you are a consultant for so you would pick one.

New application

Provide initial information for this new application.
If you need to make an application for another organisation [raise a general query](#) to have it created.

Who are you applying for?

* Consultancy

- I am applying for my organisation
 I am applying for a client

* Applying organisation

Select applying organisation.

* Application type

* Connection location

- England & Wales
 Scotland

* Project name

Enter project name.

Cancel

Create

- For Pre-applications, the same option is there where you can applying for your organisation or apply for your client.

New pre-application

In order to create a new pre-application, please enter the information below.

Who are you applying for?

***Consultancy**

- I am applying for my organisation
 I am applying for a client

*** Project name**

Cancel

Create

Managing consultant account

- As a consultant in the portal, you can view your details and manage any clients where you are the appointed consultant.

[Home](#) | [My account](#)

My account



My details

Manage your personal information, email and password and company details.



My clients

Manage the companies you are an appointed consultant for.

- When you go into My details, you can see your details and the company details also you can check if the account is a consultant account.

AA

📁 Upload Files
Or drop files

Personal Details

Full name
Abdul Basit Ali.NGET

Email
abdul-basit.ali1@nationalgrideso.com

Mobile number
+44 7472981766

Registered company details

Company name
NATIONAL ACADEMY OF TRAINING LTD

Company registration number
09482609

Company address
5 Willows Lane
CV9 2QG

Organisation type
Consultant

- Going into find client organisation allows you to apply for consultancy on behalf of other companies. The company can be searched and then a request can be submitted which they can accept/reject.

Find client organisation

In order to start your consultancy please search for the company registration number.

*Registered company

Cancel

Submit

Find client organisation

In order to start your consultancy please search for the company registration number.

*Registered company



TESTING LTD

18 Denham Close
Prenton
CH43 7NB

[Remove Company](#)

Cancel

Submit

- When you click submit and the company doesn't have an active Connection Portal account then this message appears.

Account not found

It looks like the company you selected does not have an active Connections portal account.

You can only be a consultant for organisations that are already registered.

[Go back to My clients](#)

- When a consultancy request is submitted to a company that has an active Connection Portal account then this message appears.

Request submitted

You have successfully submitted your consultancy request.
We will notify you once the company reviews it.

[Go back to My clients](#)

- Notifications are set up in the portal so that the consultant is aware when a project has been assigned to them and when their request to become a consultant is accepted or not.



Multiple projects have been assigned to you by your client STR LIMITED.
10 Sept 2024, 11:28
[Go to project](#)

STR LIMITED has accepted your request to become a consultant.
10 Sept 2024, 11:27
[Go to My clients](#)

Managing clients as a consultant

11. In the clients tab, you can see the the companies that you manage and the number of projects. The status indicates whether or not the consultancy request has been accepted. The start date is the date that the consultancy request was accepted.

[Home](#) | [My account](#) | [My clients](#)

My clients

Find client organisation

2 clients

Company name	Start date	Managed projects no.	Status
STR LIMITED	10 Sept 24	9	Active
E-MAGNETS UK LIMITED	06 Aug 24	6	Active

12. In the projects tab, you can see the projects that you manage. The company name is listed underneath the project name and that is the developer company for that project.

Projects

Q Search project name All

6 project(s) Grid View List View

projectsdaojkda ⚠

E-MAGNETS UK LIMITED

⚠ This project is going through a Modification application.

PRO-009984 👤

Test 400KV [View details →](#)

testing testing

STR LIMITED

● Pre-Commissioning ●

PRO-009981 👤 [View details →](#)

REV 1111

STR LIMITED

● Pre-Commissioning ●

PRO-009978 👤 [View details →](#)

testing1

STR LIMITED

● Pre-Commissioning ●

PRO-009968 👤 [View details →](#)

DC PDF

STR LIMITED

● Pre-Commissioning ●

SBN-Ammonia ⚠

STR LIMITED

⚠ This project is going through a Modification application.

13. This is the table view option that lists the same information in a table format. You can select the view option that you prefer.

Projects

Q Search project name All

6 project(s) Grid View List View

Project ID	Connection site	Project name	Company name	Status
PRO-009984 👤	Test 400KV	projectsdaojkda	E-MAGNETS UK LIMITED	● Pre-Commissioning ⚠
PRO-009981 👤		testing testing	STR LIMITED	● Pre-Commissioning
PRO-009978 👤		REV 1111	STR LIMITED	● Pre-Commissioning
PRO-009968 👤	Test 400KV	testing1	STR LIMITED	● Pre-Commissioning
PRO-009959 👤		DC PDF	STR LIMITED	● Pre-Commissioning
PRO-009998 👤		SBN-Ammonia	STR LIMITED	● Pre-Commissioning ⚠

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14. The icon highlighted below appears when the project is managed by a consultant. This clearly indicates which of your projects are shared with your clients and which ones are for your own company.

Projects

Search project name All

6 project(s)

This project record is shared with your client E-MAGNETS UK LIMITED.

Project ID		
PRO-009984		Test 400KV

15. This is the applications view with the Pre-applications and applications separate. This view is the same as it is for projects.

Pre-applications Applications

Search project name New pre-application

23 pre-application(s)

<p>klsdlama, </p> <p>NATIONAL ACADEMY OF TRAINING LTD</p> <p>Draft</p> <hr/> <p>APP-005178</p> <p>Pre-application</p> <p>View details →</p>	<p>odqkdqmeq</p> <p>NATIONAL ACADEMY OF TRAINING LTD</p> <p>Withdrawn</p> <hr/> <p> No longer editable</p> <p>APP-005175</p> <p>Pre-application</p> <p>View details →</p>	<p>lkadflada </p> <p>NATIONAL ACADEMY OF TRAINING LTD</p> <p>Submitted</p> <hr/> <p> No longer editable</p> <p>APP-005174</p> <p>Pre-application</p> <p>View details →</p>	<p>ldam,d vsá </p> <p>NATIONAL ACADEMY OF TRAINING LTD</p> <p>Meeting set</p> <hr/> <p> No longer editable</p> <p>APP-005173</p> <p>Pre-application</p> <p>View details →</p>
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Pre-applications Applications

Q, Search project name Select company

[New application](#)

24 application(s)  

<p>projectsdajkda</p> <p>E-MAGNETS UK LIMITED</p> <p>Draft</p> <hr/> <p>APP-005182 </p> <p>Modification</p> <p>View details →</p>	<p>dlaca,ca.,qe;cq</p> <p>NATIONAL ACADEMY OF TRAINING LTD</p> <p>Draft</p> <hr/> <p>APP-005180</p> <p>Directly Connected</p> <p>View details →</p>	<p>,lda,aacá</p> <p>NATIONAL ACADEMY OF TRAINING LTD</p> <p>Draft</p> <hr/> <p>APP-005179</p> <p>Directly Connected</p> <p>View details →</p>	<p>319831891</p> <p>E-MAGNETS UK LIMITED</p> <p>Draft</p> <hr/> <p>APP-005149 </p> <p>Directly Connected</p> <p>View details →</p>
382811	projectssomo	projectsdajkda	proewfjwde

16. In the applications page, the icon is visible which indicates which of your applications are shared with your clients and which ones are for your own company.

[New application](#)

319831891

E-MAGNETS UK LIMITED

Draft

This application record is shared with your client E-MAGNETS UK LIMITED.

APP-005149 

Directly Connected

[View details →](#)

17. In the table view of applications page, you can see the % of how much the application has been filled in. The application ID column with the applications listed can be clicked into which takes you to the specific application page.

Applications

Pre-applications Applications

24 application(s)  

Application ID	Application type	Project name	Company name	Completion %	Status
APP-005182 	Modification	projectsdaojkda	E-MAGNETS UK LIMITED	0%	Draft 
APP-005180	Directly Connected	diaca.ca.,qe.cq	NATIONAL ACADEMY OF TRAINING LTD	13%	Draft 
APP-005179	Directly Connected	.jda.aacá	NATIONAL ACADEMY OF TRAINING LTD	13%	Draft 
APP-005149 	Directly Connected	319831891	E-MAGNETS UK LIMITED	13%	Draft 
APP-005148 	BEGA Distribution Connected	382811	NATIONAL ACADEMY OF TRAINING LTD	13%	Draft 
APP-005146 	BELLA Distribution Connected	projectsomo	NATIONAL ACADEMY OF TRAINING LTD	0%	Draft 
APP-005145 	BEGA Distribution Connected	projectsdaojkda	E-MAGNETS UK LIMITED	100% 	Contracted
APP-005144 	BELLA Distribution Connected	proewfywde	NATIONAL ACADEMY OF TRAINING LTD	14%	Draft 
APP-005143 	Directly Connected	projects319312	NATIONAL ACADEMY OF TRAINING LTD	100% 	Submitted 
APP-005140 	Directly Connected	testing testing	E-MAGNETS UK LIMITED	100% 	Submitted 
APP-005134 	Directly Connected	REV 1111	E-MAGNETS UK LIMITED	100% 	Withdrawal Pending
APP-005133	Directly Connected	dsaodjq	NATIONAL ACADEMY OF TRAINING LTD	100%	Draft 

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18. In the application the icon is there again next to the application ID.

Application details	
Status	Submitted
Submission date	13 Aug 2024
Technical competency declared	-
Application fee paid	-
Clock start date	-
Offer to be Sent By	
Application ID	APP-005140 
Application type	Directly Connected, Onshore
Connection location	England & Wales
Project	testing testing

This application record is shared with your client E-MAGNETS UK LIMITED.

Actions	
	Download application
	Ask a question
	Withdraw application

Application form changes

19. In the legal notes section there is a slight change in the wording when it's an application made by a consultant on behalf of the Developer company.

I confirm that I am acting as a Consultant on behalf of a Developer Company in respect to the above legal wording. All information provided is true and correct to my knowledge and is representative of the Developer Company I am applying on behalf of.

I have read and understood the legal notes above.

[Next →](#)

20. In the application form it is clear on who the consultant organisation is and who the Developer company is.

01 Registered company

<p>Consultant organisation</p> <p>NATIONAL ACADEMY OF TRAINING LTD 09482609</p> <p>5 Willows Lane Atherstone CV9 2QG</p>	<p>Guidance</p> <p>This section matches the information provided in Your Account. If it is incorrect or needs updating, please speak to your Contract Manager.</p>
<p>Developer company</p> <p>E-MAGNETS UK LIMITED 06515204</p> <p>Northbridge Road Berkhamsted Hertfordshire HP4 1EH</p>	

21. In this section a CUSC notice contact can be added, the contact can be from the consultant organisation or the Developer company.

02 Company Secretary or person to receive CUSC notices

* Company

Consultant organisation
 Developer company

* CUSC notice contact

Search for contact

*First name

*Last name

*Job Title

*Email

*Mobile number

Select country code

Landline number

Select landline coun...

Guidance

Here, please provide the contact details for the person in your company who should receive the connection offer and any other formal communications in relation to the connections process.

Cancel Confirm

22. The company to be invoiced can be the consultant organisation, Developer company or the third party company.

03 Company to be invoiced



Provide the details of the company that is going to be invoiced for this application.

* Company to be invoiced

- Consultant organisation
- Developer company
- Third party company

Guidance

Please specify here the company details that should appear on the application fee invoice. Please note that by selecting 'Developer company', the company details will auto-populate to be the same as the registered company you have already identified. Should you wish for this to be different, please select 'Third Party Company'.

NATIONAL ACADEMY OF TRAINING LTD

09482609

5 Willows Lane
Atherstone
CV9 2QG

22. The commercial contact can be different from or the same as the CUSC notice contact

04 Commercial contact



A. Contact details

Is the person to receive the Offer different from Company Secretary or person to receive CUSC notices identified in question 2 above?

* Commercial contact

- Yes, it is a different person.
 No, it is the same person.

Guidance

Please specify the contact details, company name and address of the recipient of any CUSC related documents.

B. Contact address

Is the address of the Commercial contact different from the one identified in question 2 above?

* Commercial contact address

- Yes, it is a different address.
 No, it is the same address.

NATIONAL ACADEMY OF TRAINING LTD

09482809

5 Willows Lane

Atherstone

CV9 2QG

C. Share contact details

Please confirm whether you are happy for your contact details to be passed over to the relevant Transmission Owners (TO's).

* Share contact details with the relevant Transmission Owners (TO's)

- Yes, I am happy to share my details.
 No, I don't want to share my details.

23. 4 new plant types have been added. Ammonia, Hydrogen, LAES (Liquid Air Energy Storage) and Substation.

01 Summary of Application

Please provide a brief description of the plant to be connected and select the plant type(s) from the list below.

* Plant description

* Plant type

Reactive Compensation	▲	Ammonia
Thermal	▶	Hydrogen
Tidal	◀	LAES (Liquid Air Energy Storage)
Waste	▼	Substation

Move selection to

24. In the Declaration of Acceptance section there is a slight change in the wording when it's an application made by a consultant on behalf of the Developer company.

I confirm that I am acting as a Consultant on behalf of a Developer Company in respect to the above Declaration of Acceptance. All information provided is true and correct to my knowledge and is representative of the Developer Company I am applying on behalf of.

I have read and understood the Declaration of Acceptance above.

Managing consultants as a developer

25. As a developer company the account will show my details and my consultants.

[Home](#) | [My account](#)

My account



My details

Manage your personal information, email and password and company details.



My consultants

Manage your appointed consultants and projects assigned to them.

26. In the details tab it will have the user's and company's details listed.



[Upload Files](#) Or drop files

Personal Details

Full name
Revanth VS

Email
revanth.vs@nationalgrid.com

Mobile number
+91 8248407005

Registered company details

Company name
STR LIMITED

Company registration number
04064332

Company address
Navigation Park Test Enterprise House,
Hampshire
PO8 3TD

27. In the My consultants tab you can view the current consultants that you have and any requests that may have come in.

[Home](#) | [My account](#) | [My consultants](#)

My consultants

Consultants will act on your behalf within the Connections Portal to access, edit and submit application and project data.

[Active consultants](#) | [Consultant requests](#)

3 consultants

Company name	Start date	Managed projects no.	
NATIONAL ACADEMY OF TRAINING LTD	10 Sept 24	6	⋮
123 LIMITED	12 Sept 24	1	⋮
CALLUM AND SON LTD	14 Aug 24	1	⋮

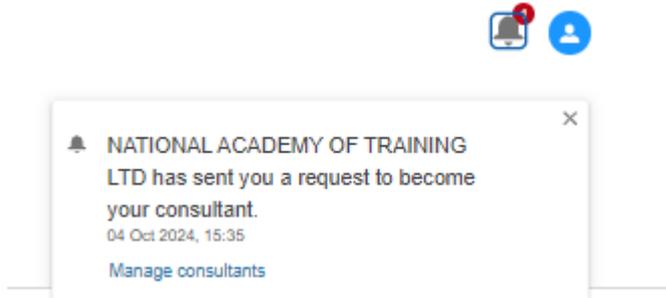
28. You can manage projects and remove consultants if they are no longer needed.

3 consultants

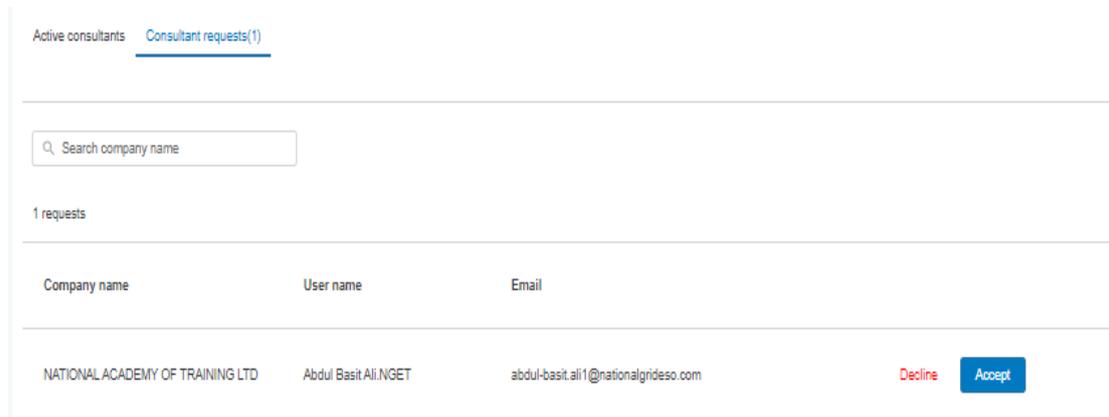
Company name	Start date	Managed projects no.	
NATIONAL ACADEMY OF TRAINING LTD	10 Sept 24	6	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> ⋮ Manage projects Remove consultant </div>
123 LIMITED	12 Sept 24	1	⋮
CALLUM AND SON LTD	14 Aug 24	1	⋮

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29. You will be notified in the portal, when a request has come through for a company to become your consultant.



30. You have the option to accept/decline



31. There is a prompt asking if you are sure about accepting the request when you click accept.

Accept request

Are you sure you want to accept this consultancy request?

By approving this request the consultant will act on your behalf within the Connections Portal to access, edit and submit application and project data.



32. Once the request is accepted, you can then assign projects to the consultant.

Request accepted

You have successfully accepted this consultancy request.
You can now assign projects to this consultant.

[Assign projects to consultant](#)

Assigning projects as a developer

33. You can select projects that you want managed by the consultant. They can be selected all together or individually.

Manage consultant projects

NATIONAL ACADEMY OF TRAINING LTD

Select the projects you want your consultant to be responsible for.

Consultant projects

All the projects included in the table below will be managed by your consultant.

[Assign projects](#)

6 projects

<input type="checkbox"/>	Project name	Project ID	Plant type	Connection type	Project status	
<input type="checkbox"/>	projectsdaojkda	PRO-009984	Ammonia	Generation	Pre-Commissioning	⋮
<input type="checkbox"/>	testing testing	PRO-009981			Pre-Commissioning	⋮
<input type="checkbox"/>	REV 1111	PRO-009978			Pre-Commissioning	⋮
<input type="checkbox"/>	testing1	PRO-009988	Ammonia	Generation	Pre-Commissioning	⋮
<input type="checkbox"/>	DC PDF	PRO-009959			Pre-Commissioning	⋮
<input type="checkbox"/>	SBN-Ammonia	PRO-009988			Pre-Commissioning	⋮

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Consultant projects

All the projects included in the table below will be managed by your consultant.

Search project name or ID

1 projects selected

<input type="checkbox"/>	Project name	Project ID	Plant type	Connection type	Project status
<input checked="" type="checkbox"/>	New Test data	PRO-009991	Biomass	Generation & Demand	● Pre-Commissioning
<input type="checkbox"/>	test5OFF	PRO-009958			● Pre-Commissioning
<input type="checkbox"/>	test for 5th august	PRO-009956	Biomass	Generation & Demand	● Pre-Commissioning
<input type="checkbox"/>	test 1234	PRO-009950	Biomass	Generation & Demand	● Pre-Commissioning
<input type="checkbox"/>	REV assign project Devco	PRO-009949			● Pre-Commissioning
<input type="checkbox"/>	Ankita Test	PRO-009939	Biomass	Generation & Demand	● Pre-Commissioning
<input type="checkbox"/>	Rev test3	PRO-009937			● Pre-Commissioning
<input type="checkbox"/>	Sada_APPJ	PRO-009935	Ammonia	Generation & Demand	● Pre-Commissioning
<input type="checkbox"/>	11741testing	PRO-009931	Ammonia	Demand	● Pre-Commissioning
<input type="checkbox"/>	Test_11870	PRO-009928	Ammonia	Generation & Demand	● Pre-Commissioning
<input type="checkbox"/>	test may 162w121	PRO-009925			● Pre-Commissioning
<input type="checkbox"/>	Rev TEST	PRO-009894			● Pre-Commissioning

1 - 12 of 12 items Page 1 of 1

34. When you try to assign a project, you will be prompted to confirm that you want to assign the project to the consultant.

Consultant projects

All the projects included in the table below will be managed by your consultant.

Search project name or ID

1 projects selected

<input type="checkbox"/>	Project name	Project ID	Plant type	Connection type	Project status
<input type="checkbox"/>	New Test data				● Pre-Commissioning
<input checked="" type="checkbox"/>	test5OFF				● Pre-Commissioning
<input type="checkbox"/>	test for 5th august	PRO-009956	Biomass	Generation & Demand	● Pre-Commissioning
<input type="checkbox"/>	test 1234	PRO-009950	Biomass	Generation & Demand	● Pre-Commissioning

Confirm project assignment

Are you sure you want to assign the selected project(s) to this consultant? All related data will be made available.