Connection Portal User Guide

Step by Step Portal Guide

27/01/2023

ESO

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Introduction

As part of our RIIO-2 ambition, the Connections Portal is being designed to transform the Connections Journey and account management for all Customers.

The Portal will provide a single point of contact for all ESO connections customers looking to either connect to or make use of the transmission system. The initial release will look at the digitisation of the application process and include the following high-level functionalities:

- Apply for connections and other agreements online

- Monitor live applications and track progress

- Access to signed contract documents

- View of key milestones / milestone management

- Communicate directly with your connections contract manager

This guide is created to help the users with step-by-step process of using the Portal for the Connections Journey.

New Account Registration

Important information

1. Please note the first person registered on the portal from an organisation, will be assigned 'Super User' status.

2. Super user will be managing the registration requests of other users from the organisation. This provides the control to the organisation to manage their users.

3. Up-to 5 users (1 Super user and 4 Standard users) can be registered under an account.

4. An individual email Id can only be used once to register.

5. Users will need Salesforce authenticator app to support the secure login process

Parent Company and Child/SPV Company

1. To ensure that your account is set up correctly in the Connection Portal, it is essential that registration request is submitted under the appropriate Parent/Child/SPV set up.

2. If you are the user, who want to have the visibility of all the information across all of your sub companies / SPVs which are under the umbrella of parent company, you need to select the company which is a parent company while submitting the registration request.

3. If you only want to manage an individual Sub Company/SPV, please select the relevant while registering for an account.

Register new account

1. To access the Customer Portal, you will need to register new account.

2. **Before starting the registration process, please note that first user registering for a company will be assigned 'Super User' status. Super user will have full access of the account and will manage the registration of 'Standard Users' of the company.**

3. **Super User will also have to complete Super User registration form. Instruction will be provided via email sent as part of registration process.**

4. **Also 'Standard Users' will not be able to register until the 'Super User' registration has been completed and active. Customer Portal will automatically check this during registration process and will display the message if another user tries to register while Super User registration still in progress.**

Superuser not active

It looks like the Superuser account for your organisation
is currently being created.

Unfortunately we cannot process your registration at the moment.
Please try again later.

Return to Login

5. Please follow the below steps for registering new account.

6. Go to Customer Portal webpage and click on 'Register new account'.

7. The first step is to search for your company for which you want to register. You can search either by company name or registration number. As you will start searching, relevant results will be displayed.

8. Select your organisation from the result list, system will show the below screen

9. Click 'Next' to move to the next step. You can also search again by clicking on 'Remove Company' if needed.

10. Now you will need to enter your details as shown below. Please note all fields are mandatory except the Landline number field.

Register new account

Your contact details

First name

Last name

Email

Confirm email

Mobile number

Landline number

Previous   Submit

11. System will prompt you about the 'Super User' as advised in point 2 above, once an email Id is entered. If you are happy with it, please complete the remaining fields and proceed to next step. Otherwise have a conversation in your team/department about it.

Register new account

Your contact details

* First name

* Last name

* Email

    .... @nationalgrideso.com

ⓘ Please note that you are the first user to register for this account, and you will be given Superuser access. If that's not you we suggest to quit the registration process and try later on.

* Confirm email

Email

Previous   Submit

12. Once all fields are completed, 'Submit' button will become active to submit the registration request.

13. You will receive an onscreen confirmation as below and email to verify your email address used for registration process.

Register new account

Confirmation

Thank you for submitting your registration.

An email will be sent to you with a link to verify your email address.

14. Please follow the instructions in the email. There are two steps to complete, and these can be completed in any order.

15. First step is to fill the Super User Authorisation form, print on company letter headed paper, get it signed by company authorised signatory and send to transmissionconnections@nationalgrideso.com. This will be reviewed by Connection Team to assess the registration request so to ensure that right user is registered against the company.

16. Second step is to verify your email id. Please click on the relevant link in the email for this. Once you have verified the email id, you will see the below message.
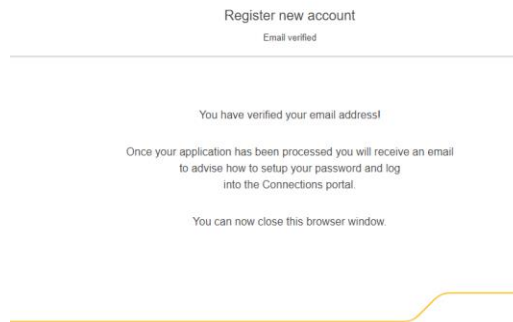
17. Once both of the steps are completed by you and Super User Authorisation form has been processed by the Connection Team, you will receive another email containing your username and explaining the process of setting up password. Please follow the instructions in the emails.
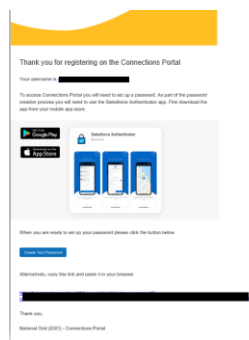
18. Please note you will need to download the Salesforce Authenticator application on your mobile device to help with the login process. This also helps with keeping your account safe and secure.

19. You will not need to login into the app by using any email id. Please follow the instruction and app will automatically detect your system login.

20. Once you have downloaded the app, click on the 'Create Your Password' link. Please make sure it meets the minimum requirement as stated and as you start typing, you will see the tick box against these requirements.


21. Once all required information has been completed, 'Create password' button become active, click to create the password. On successful completion you will be get the following message.

Password Created

Thank you for creating you Password!
You can now login to the connections Portal

Please wait while we redirect you to the login screen…
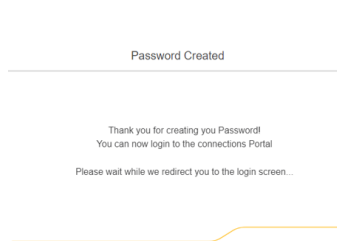
22. Once you are on login screen, enter your username and password that you have just created and click 'Sign in'. You will get the below screen to connect your account to the Sales Force Authenticator app. This will add another layer of security to avoid the risk of unauthorised activities.
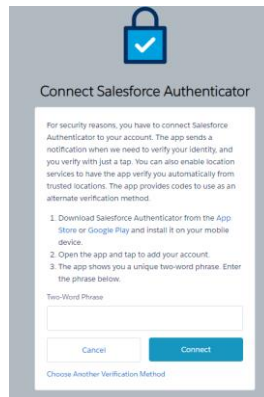

23. Open the app. Please note if you are using this app first time, you may get the promotional screen providing you the tour of the app etc. This can be skipped as required.

24. You will then see the below screen. Once you click on 'Add an Account', you will see two words as shown in 2nd picture below.
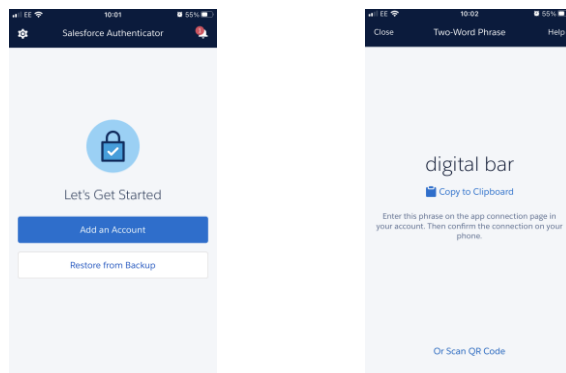

25. Enter these two words in the Portal screen and click 'Connect'. You will then see the 2nd picture as below.
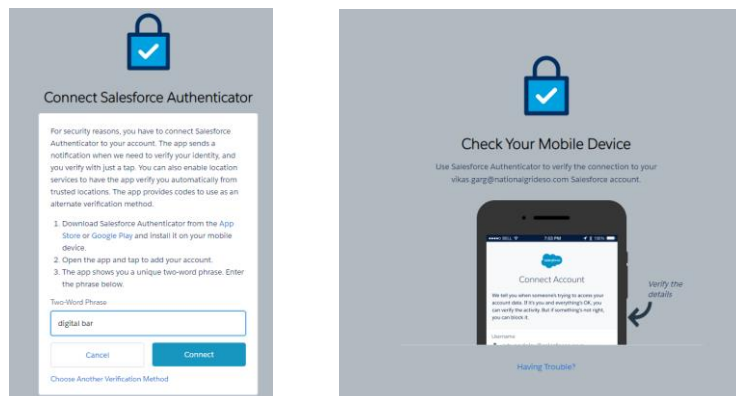
26. Go back to the app in your phone and click 'Connect'. You will note that app has automatically has your details to connect to. Once connected, you will see the confirmation as shown in 2nd picture.
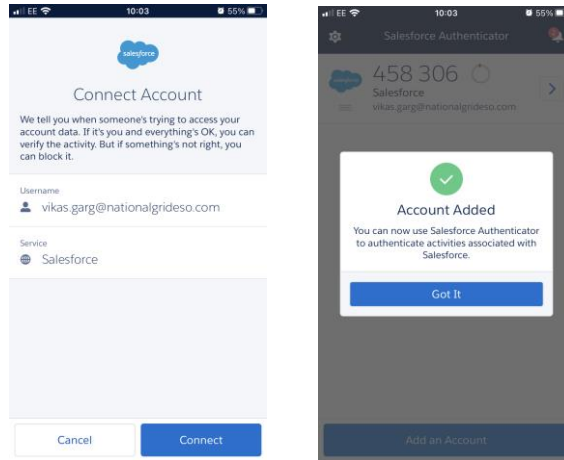
27. App also provide an option to automatically approve the login by tracking your location. This can be switched on as needed. Please see some pictures below.
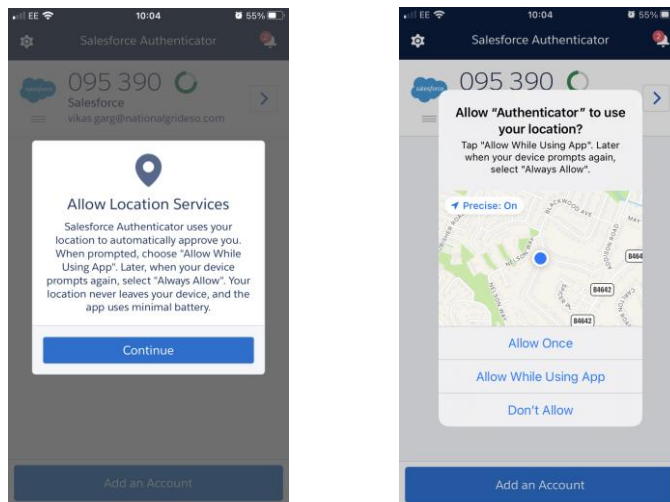

28. You are all set up and ready to use the Connection Portal.

29. Please note that currently an email address can only be used once for registration. So, if you try to register again using an email address, that has already been used, you will see the below error message.'
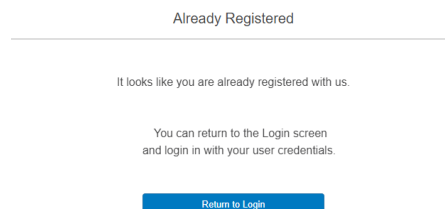
30. Once Super User is active for an organisation, other users can submit the registration requests following the same steps as mentioned above. These requests will be reviewed and approved by Super User of the organisation.

31. Please see the below section how Super User can process these requests.

Standard User Management

32. Super user will see all the pending requests from other users under the 'User' sections of the portal as shown below (1st picture).
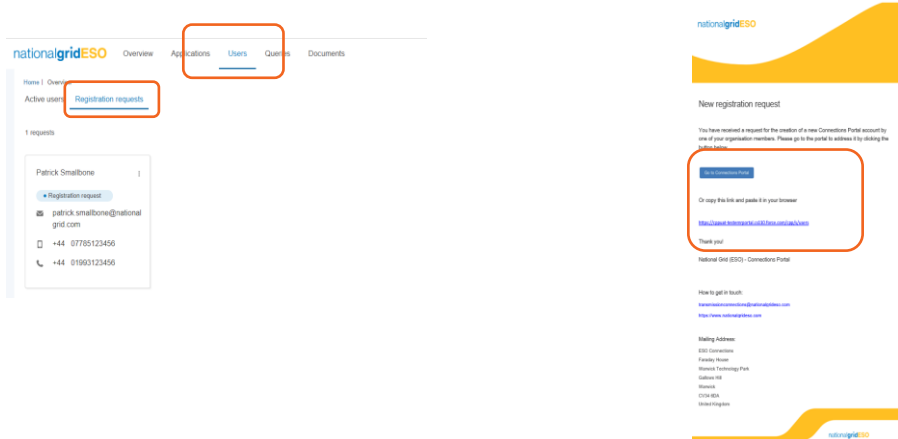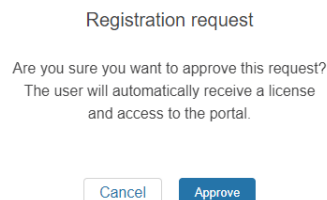

33. Super user will also receive an email (2nd picture above) about this and click on the link in the email to go to the request.

34. To Approve/Reject the registration request, click on the three-dot menu on the top right of tile and then select the relevant option.
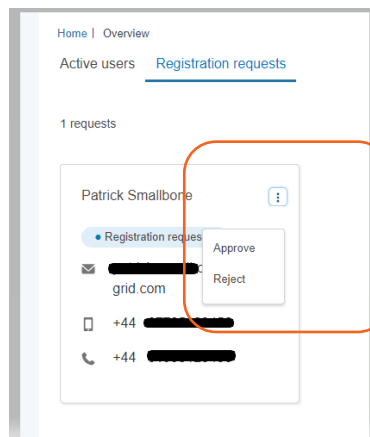
35. To approve the registration, select 'Approve' and you will see the below message. Click 'Approve' to proceed or 'Cancel' to go back
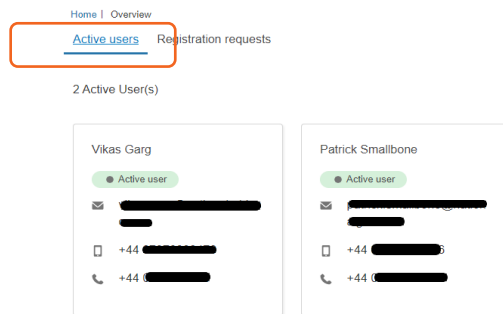

36. Once approved, you will see the confirmation message and advise about remaining licences. User will also receive an email for to complete the registration process e.g., password creation etc.
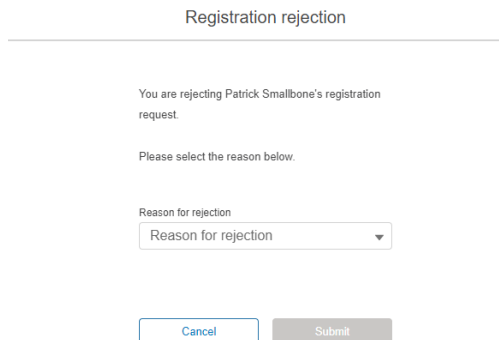
Registration accepted

You have successfully accepted the registration request.
You now have 3 license remaining.

[Go to Users page]

37. Super user will also be able to view all the users registered under 'Active User(s)'

Home | Overview

Active users   Registration requests

2 Active User(s)

Vikas Garg	Patrick Smallbone
● Active user	● Active user
✉ ▬▬▬▬▬	✉ ▬▬▬@▬ ▬▬
▯ +44 ▬▬▬▬	▯ +44 ▬▬▬
☎ +44 ▬▬▬	☎ +44 ▬▬▬

38. When you click 'Reject', you will see the following window to add the reason for rejection.

Registration rejection

You are rejecting Patrick Smallbone's registration request.

Please select the reason below.

Reason for rejection

Reason for rejection ▼

[Cancel] [Submit]

39. Select the reason from the drop-down list. There are currently two options in this dropdown as below

   a. Insufficient licences available – This is when you already have total of 5 user (including super user) registered for the account.

   b. Other – This will open a new free text box field for you specify the reason.

40. Please select appropriate option and click 'Submit' to complete the process.
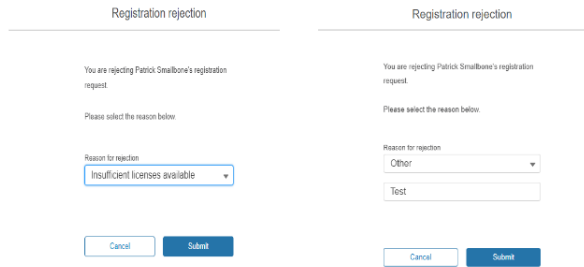
41. You will receive confirmation message as below. This will advise how many licences are still available. This will also send an email to user advising the rejection.

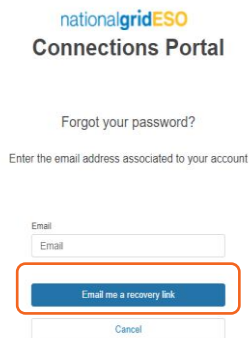## User login help

42. If you need to request password, please use the 'Forgot Password?' link.

43. Enter the email address and click 'Email me a recovery link'. Once you have received an email, follow the instruction to reset your password.

44. If you need help with the Customer Portal, you can use the 'Need help?' function. Click on it will create an email which can be used to explain the area of help.

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Connections Portal

Username

Username

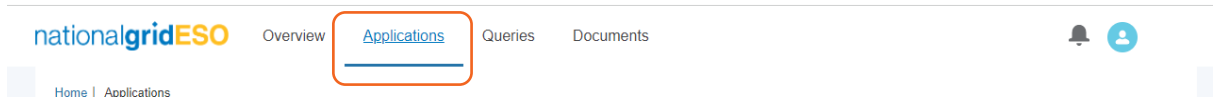Password

Password

Forgot password?

☐ Remember me

Sign in

Register new account

Need help?

Pre-Application

Creation of Pre-application

1. To create a new Pre-Application, click on 'Application' tab as shown in below

2. Then select 'Pre-application' and then click on 'New pre-application'
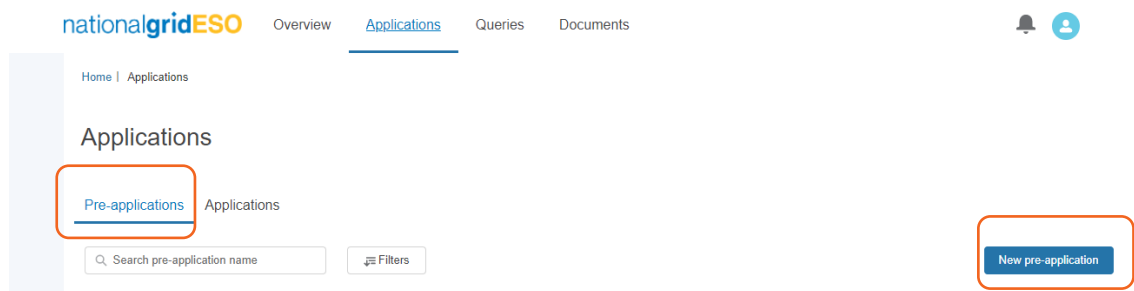
3. Enter the 'Project name' and click 'Create' which will become active on completion of the project name.

4. You will come to a form to complete as shown below. This has four sections. Please note the fields marked as "*" are mandatory fields.

5. To help you to complete the form fully, there is section on the left which act as traffic light system and helps you understand if all the required fields in an individual section have been completed or not.

6. For a partly field section, you will see orange warning as below –

7. Once all the required fields are completed, this will turn green as shown below –

8. Please expand the relevant section by clicking on "+" icon to complete. Please see details below for each section.

Section 1 – Project Details

Project details

* Project name

Pre Application

* Distribution / Transmission connected

○ Transmission
○ Distribution

> Select the correct option based on connection

* Connection type

○ Generation
○ Demand
○ Generation and Demand

> Select the correct option based on your project type. Please note you can only select one.

* Plant type

Biomass

CCGT (Combined Cycle G...

CHP (Combined Heat and ...

Coal

Demand

Energy Storage System

> Select the plant types and click on the 'right arrow' to move to the box on the right-hand side to complete the selection. You need to select at least one. If you make an incorrect selection, select it in the right-hand box & click 'left arrow' to remove this selection. Please note you will need to select the correct one first before removing the incorrect option.

* Project capacity

0.000   MW

> Please enter the Project Capacity up to three decimal places.

* Aspired connection date

DD/MM/YYYY   📅

> Please enter the connection date.

Land identified / Head of Terms Agreed

> Please use this field to add details of the land.

* Planning consent status

> Please use this field to provide details of Planning consent status etc.

Section 2 – Developer company details

Developer company details

* Developer company registration number

🔍 Search For Company

> Complete this field by searching the company by name or registration number. This field search for company from the Company House portal and extract the details.

Developer parent company registration number

🔍 Search For Company

> Similarly search of developer parent company if required.

Developer website

> Enter the Developer company website address.

Contact Details

+ Add contact details

> Use this function to add the contact details of the individual(s) regarding this application. You can add more than one contact and specify who will be primary contact.
>
> Clicking this button will open the form as shown below. Please fill the required details and click 'Save'.

*First name

*Last name

*Job Title

*Email

*Mobile number

Select country code ▼

Landline number

Select landline cour ▼

☐ Use this contact as primary contact

Cancel   Save

Section 3 – Site location

Site location
―

* Connection site

🔍 Search for connection site

National Electricity Transmission System site

Please search and select the potential substation/GSP where you would like to connect.

Site longitude

Site latitude

Please provide site coordinates if available.

Section 4 – Notes and Terms of reference

Notes
―

If you have any further information that may be useful to discuss in your pre-application meeting, please provide the details here. This could include any questions you wish to raise relating to fees, charging, etc.

Notes

This is the free text field to add any additional information to help with the pre-application.

Terms of Reference

- Aim is for customer to outline their project vision and for the TO to listen to what their ambitions are.

- Based on the information provided in the pre-app form, we will endeavour to provide a high level and indicative view of what

⌄

☐ * I have read the Terms of Reference

You will need to read the Terms of Reference and tick the box to confirm. Click on the down arrow to view the full list.

9. You can save the form as draft to review and complete later. To save as draft, click on 'Save draft' button as the bottom left side of the form.
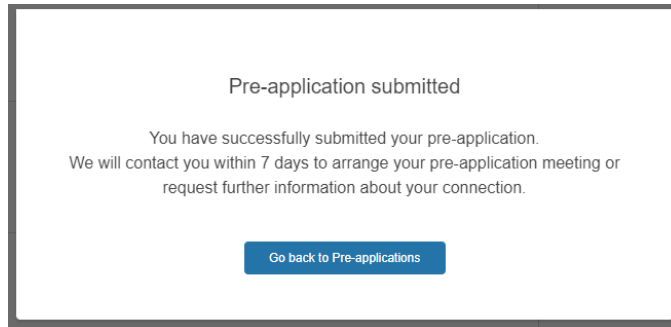

10. All the pre-application that has been created, submitted or withdrawn will be available to view on the 'Application' home screen as individual tiles as shown below –

Submission of Pre-application

11. Once all the required fields have been completed, 'Submit' button as the bottom of the pre-application page become active and you can click it to submit the pre-application.

12. On submission, you will get a pop-up message as shown below and will also receive an email confirmation of the submission.

Pre-application submitted

You have successfully submitted your pre-application.
We will contact you within 7 days to arrange your pre-application meeting or request further information about your connection.
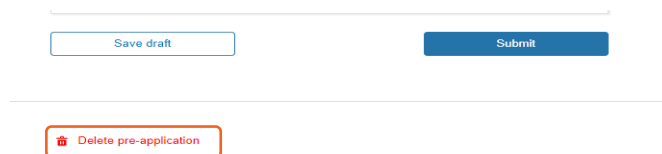
Go back to Pre-applications

13. Please click 'Go back to Pre-application' to return to the home screen. You will notice that pre-application status is now showing as 'Submitted'. You can view the pre-application by clicking 'View details' button on the Pre-Application tile.

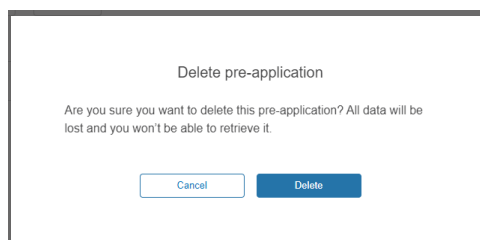## Deletion of Pre-application

14. A pre-application that has not been submitted can be deleted if needed. You can do this by following ways.

15. You can click on 'Three dots' at the top right corner of the pre-application tile and click 'Delete'
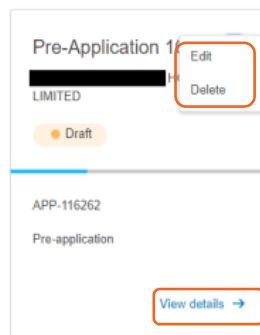
or you can click on 'View details' and then scroll down to the bottom of the page and click 'Delete pre-application'


16. You will then get a pop message as shown below, click 'Delete' to delete the application or you can click 'Cancel' to go back to home screen.

Delete pre-application

Are you sure you want to delete this pre-application? All data will be lost and you won't be able to retrieve it.

Cancel   Delete

17. Please note as mentioned in the pop message above, deletion of pre-application will result in loss of all data and deleted pre-application will disappear from home screen.
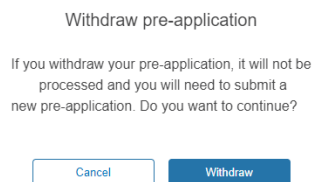
Withdrawal of Pre-application

18. Withdrawal of submitted pre-application can be carried out by either clicking on three dots menu on the pre-application card and then clicking 'Withdraw'
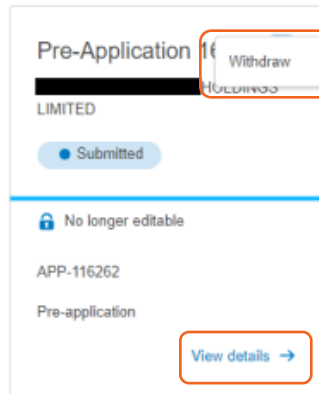

Or by clicking on 'View details' and selecting 'Withdraw pre-application'
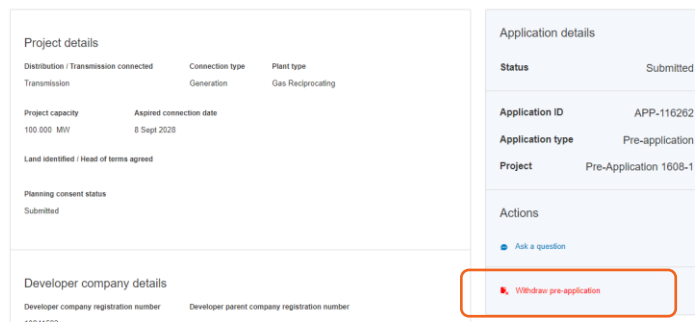

19. When you withdraw by using one of the two options mentioned above, you will see a pop-up message as below, click 'Withdraw' to proceed or 'Cancel' to go back to the pre-application.

20. When you click 'Withdraw', you will get a confirmation message of the withdrawal as below. You will also receive an email about this.
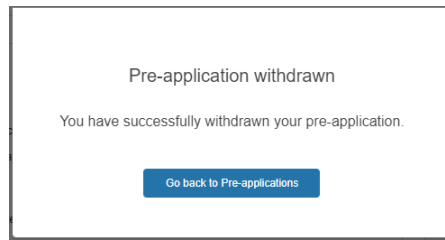
21. The status of pre-application will also change to 'Withdrawn' as shown below-
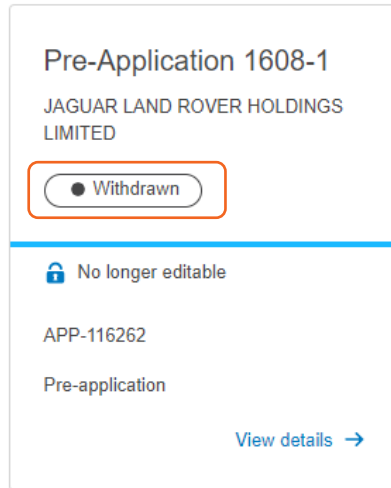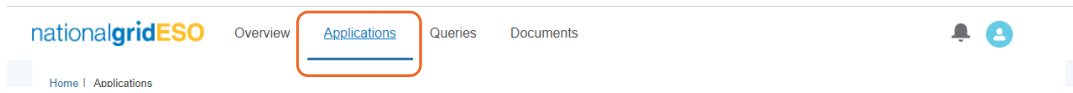

22. Users can view the progress of the pre-applications by reviewing the statuses in the pre-application tiles as shown in the above picture.
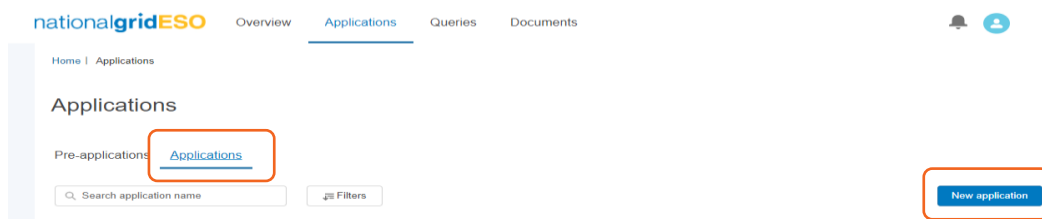
Application

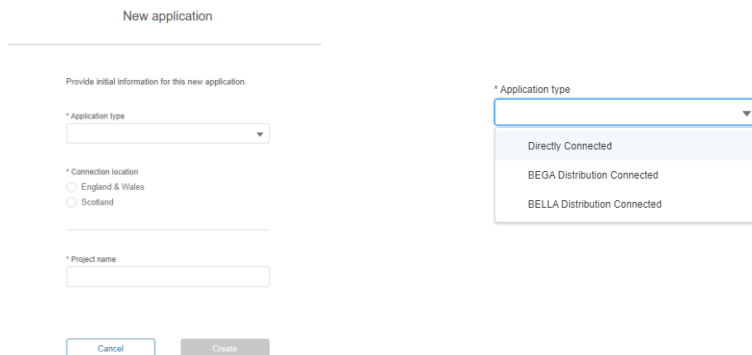## Creation of application – BCA, BEGA & BELLA

1. Login into the Customer Portal.
2. To create a new Application, click on 'Application' tab as shown in below.


3. Then select 'Applications' and then click on 'New application'

4. You will see the below pop-up window, asking to fill initial information before proceeding to full application form based on the selection made.


Please select the relevant Application Type from the dropdown list. Depending upon the selection made, subsequent question will change accordingly. Please see screen prints for different Application Types –
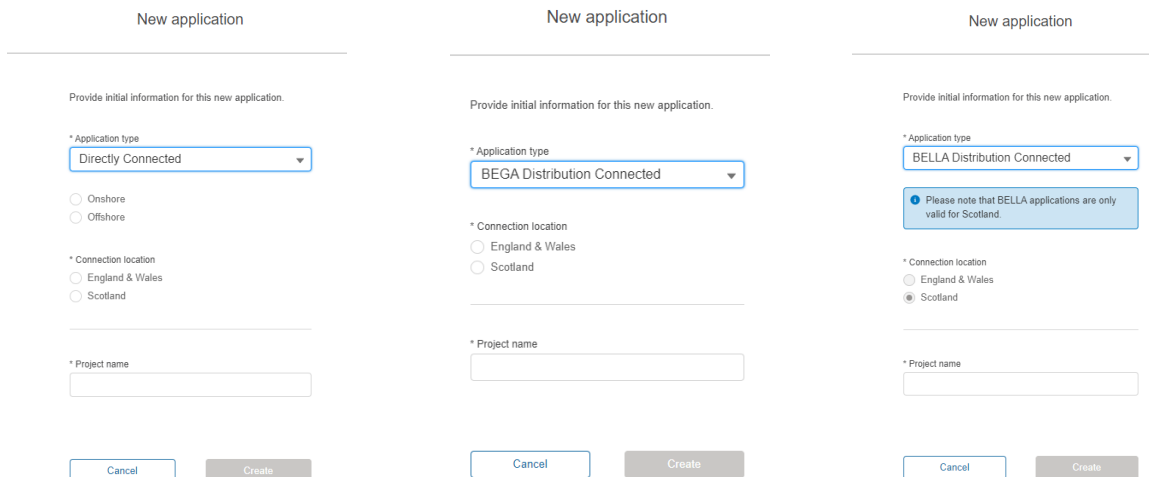
For this guidance we will select the 'Directly Connected' Application type. Selections of other application types will also follow the same process.

5.   On selection of the 'Application type' as Directly Connected, you will see below screen asking to make selection from 'Onshore' and 'Offshore' options. Then select the Connection location and provide the Project name.
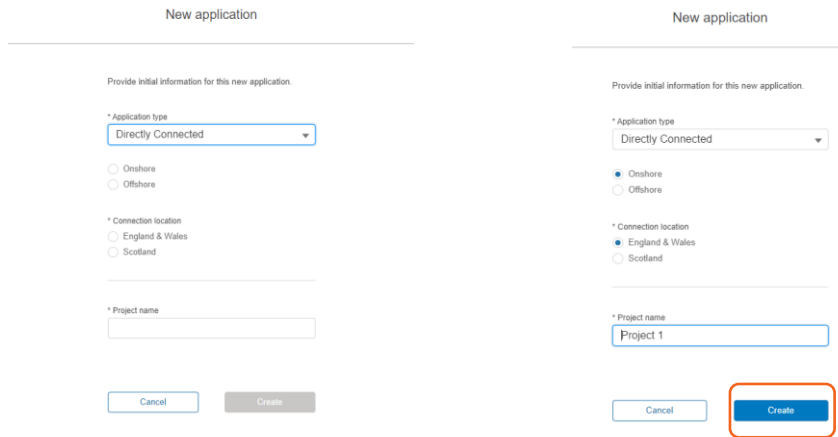
6.   Once all the fields are completed, 'Create' button will become active. Click to create the application and complete the rest of the application form.
7.   Clicking 'Create' button will take you to the first section of the application form.
8.   From here onwards, you can complete the whole application in one instance or save it in draft form to complete it in more than one attempts. For this, scroll down to the bottom of the page and click 'Next' to go the next section or click 'Save and Close' to save the application as draft.

9.   On saving the application, you will see the below screen, providing an overview of the application.

Home | Applications | APP-046415

← Back

DC Project 2

████████████HOLDINGS LIMITED

[Submit application]

Please complete the below table, providing all the required information. If you are unsure about any of the requirements, please contact us through our central connections email account here.

High level application details.

Application progress

13% completed

✓	**Pre-read** Legal notes	>
⚠	**Section A** Applicant details	>
3	**Section B** Proposed point of connection	>
4	**Section C** Technical information	>
5	**Section D** Programme	>
6	**Section E** Enabling Works	>
7	**Section F** Standard planning data	>
8	**Declaration of Acceptance** Review and accept	>

Application details

Status	Draft
Application ID	APP-046415
Application type	Directly Connected, Offshore
Connection location	Scotland
Project	DC Project 2

Actions

⬇ Download application

💬 Ask a question

🗑 Delete application

Fee Calculator

When you have completed all the required mandatory fields, the Fee Calculator tool will help you estimate the cost of your application fee.

[⬇ Download fee calculator]

Fee calculator to download

Application documents

You have 4 document(s) uploaded to this application.

View all documents →

Your invoice

You have submitted your application. A copy of your invoice will be available here once it has been raised.

Link to go to the document list uploaded as part of application

Left hand section showing application progress with green tick next to completed section(s), orange triangle for partially completed and blue for incomplete sections.

10. You can complete any section in any order by clicking on the relevant section.
11. Each individual section has its own progress bar, showing the progress. This will be very helpful while completing the application form.

> **Section A**
>
> **Applicant details**
>
> This section of the application is primarily concerned with your company details, including your registered company name, number and address. We will also require some contact information for parties who will be dealing with your connection application within your organisation.
>
> ---
>
> Section progress
>
> **7** of **7** questions completed

> **Section B**
>
> **Proposed point of connection**
>
> This section of your application looks at the proposed physical location of your connection and any information you may have at this stage regarding land rights, conditions and requirements.
>
> ---
>
> Section progress
>
> **2** of **7** questions completed

12. You will also be prompted about unanswered questions in individual sections with system showing orange warning symbol against these questions.

> 01 Connection name and location   +
>
> 02 Connection site plan   +
>
> 03 Legal estate details   ⚠ +
>
> 04 Land occupants   ⚠ +
>
> 05 Planning consents   ⚠ +

13. There is a guidance available against each question to help with the requirement/information needed.

> **01 Connection name and location**   −
>
> Please identify (by grid coordinates and reference to an extract from an Ordnance Survey Map) the intended location (the "**Connection Site**") of the **Plant** and **Apparatus** (the "**User Development**") which it is desired should be connected to the **National Electricity Transmission System** and where the application is in respect of a proposed **New Connection Site** other than at an existing sub-station. Please specify the proposed location and name of the **New Connection Site** (which name should not be the same as or confusingly similar to the name of any other **Connection Site**) together with details of access to the **Connection Site** including from the nearest main road.
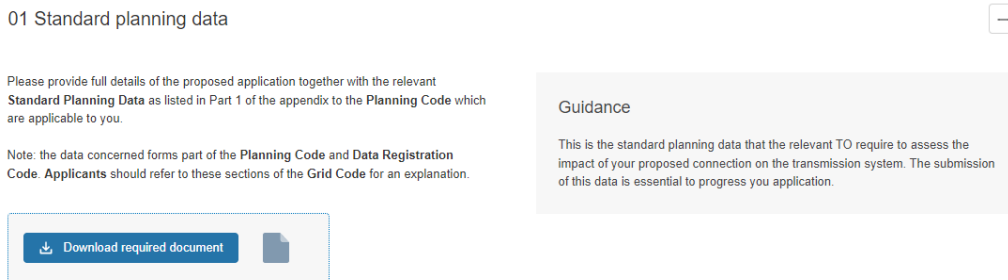>
> **Guidance**
>
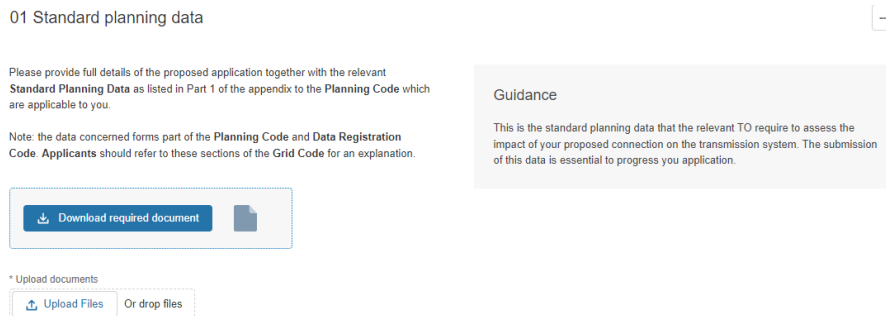> In this section please specify the details about the name and location of your connection.

14. Where required by questions, there is an option to upload multiple documents. For this you can either click on 'Upload Files', browsing & selecting the required document or drag & drop the files.
    You can upload most of the file types e.g., docx, pdf etc. Either you can upload individual multiple files or as a zip folder.
    There is also an option to delete the uploaded document and reupload if required.

Upload documents

[⬆ Upload Files] Or drop files

Safety Rules 🗑   Further info 🗑
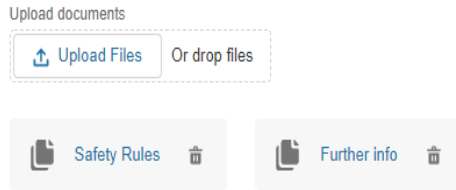
15. You can download the DRC form from the Section F directly and upload it here again once completed.

01 Standard planning data   [–]

Please provide full details of the proposed application together with the relevant
Standard Planning Data as listed in Part 1 of the appendix to the **Planning Code** which
are applicable to you.

Note: the data concerned forms part of the **Planning Code** and **Data Registration
Code**. **Applicants** should refer to these sections of the **Grid Code** for an explanation.

[⬇ Download required document]

Guidance

This is the standard planning data that the relevant TO require to assess the
impact of your proposed connection on the transmission system. The submission
of this data is essential to progress you application.

16. Once you download the form, the option to upload the completed form become available. Again, you can upload multiple files here also.

01 Standard planning data   [–]

Please provide full details of the proposed application together with the relevant
Standard Planning Data as listed in Part 1 of the appendix to the **Planning Code** which
are applicable to you.

Note: the data concerned forms part of the **Planning Code** and **Data Registration
Code**. **Applicants** should refer to these sections of the **Grid Code** for an explanation.

[⬇ Download required document]

Guidance

This is the standard planning data that the relevant TO require to assess the
impact of your proposed connection on the transmission system. The submission
of this data is essential to progress you application.

* Upload documents
[⬆ Upload Files] Or drop files

17. Once all the sections of the application form have been completed, application overview page shows the green tick against each section and progress bar at the top will show 100%.

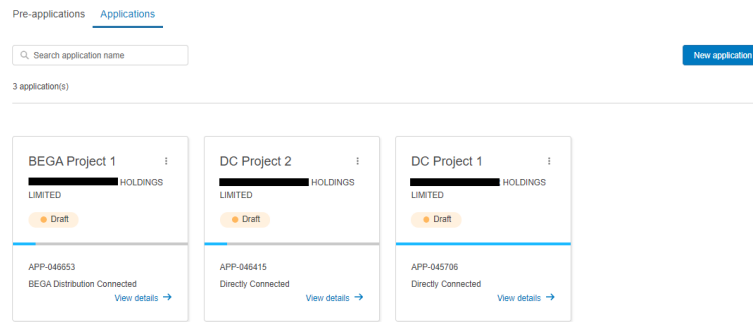At this stage 'Submit Application' button will also become active.
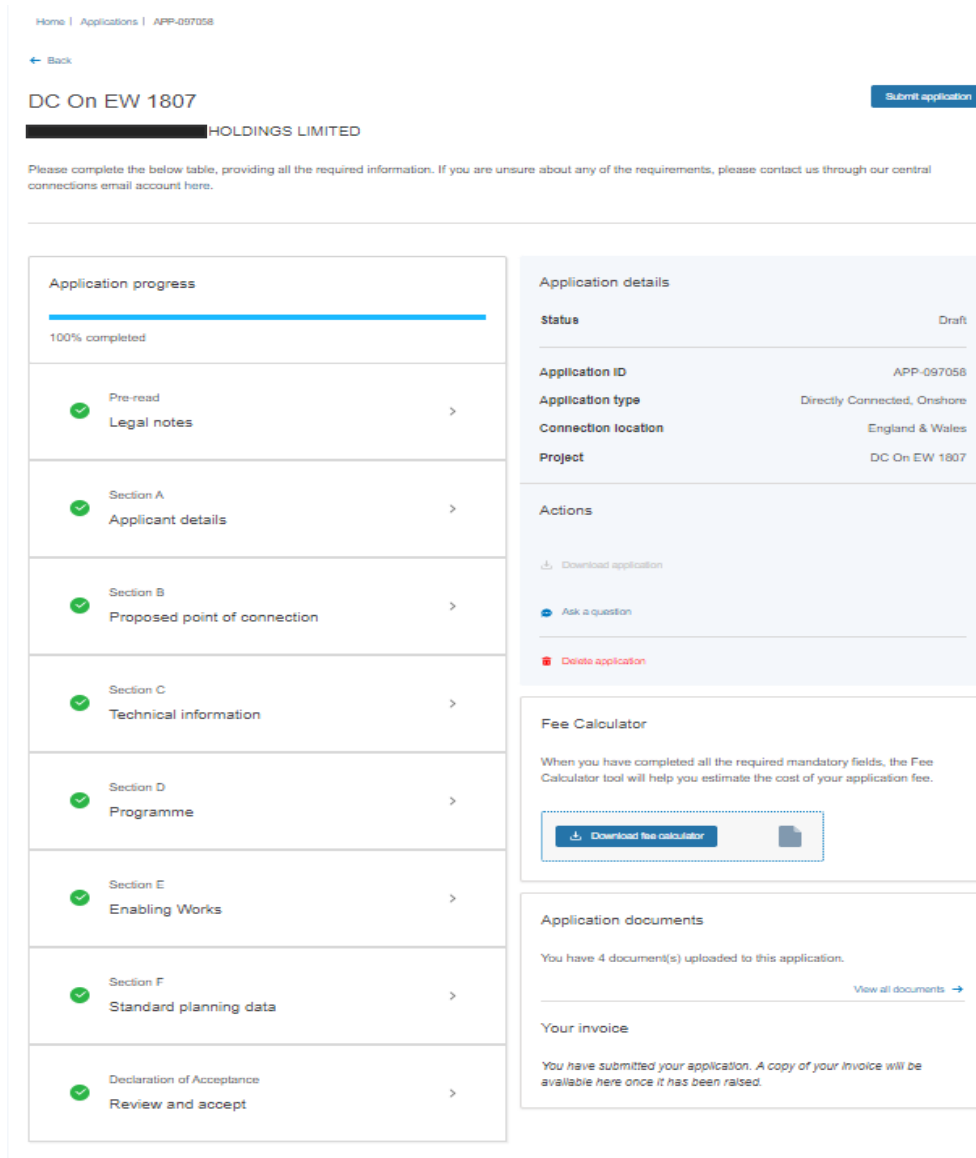
18. You can return to Application home page by using either 'Back' button or clicking on 'Application as highlighted in below picture.
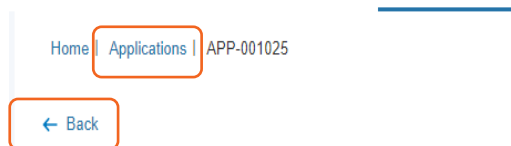

19. All application that has been created will be available to view on the 'Application' home screen as individual tiles as shown below.

Creation of application – Modification, SOW & PP

20. Login into the Customer Portal.
21. To create an application, click on 'Projects' tab. This will list all the projects as individual projects' tiles.
22. Go to the project for which a Modification, SOW (Statement of Work) or PP (Project Progression) application need creating and click on 'View Details' link on the tile.
23. Then click on 'Modify contract' button, you will be presented with the below pop-up screen, select the relevant option from the drop-down list and click 'Create'.
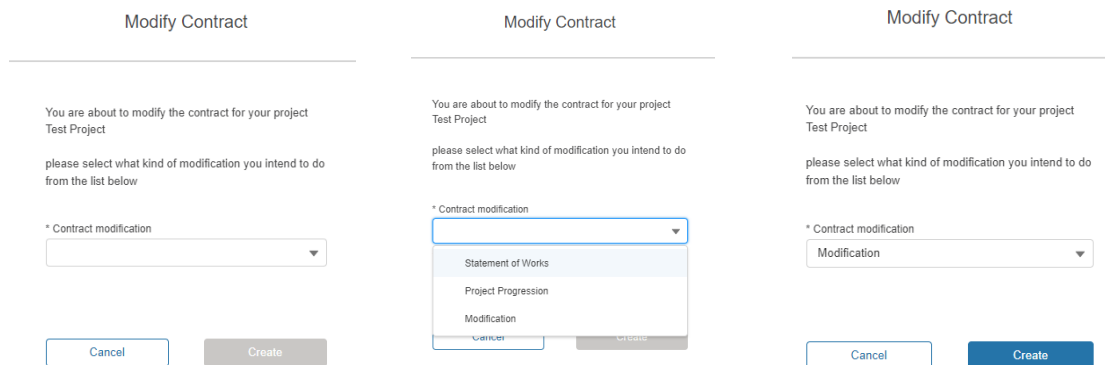
24. Please note that SOW & PP applications are only available if you are a DNO.
25. For Non DNO customers, clicking on 'Modify contract' will take you straight to the modification application.
26. The relevant application form then can be completed similarly as advised in previous section.

Submission of Application

27. You can submit the application once it has been fully completed. Application completion will be visible on the progress bar (horizontal blue line) on the application home screen or on each application also.
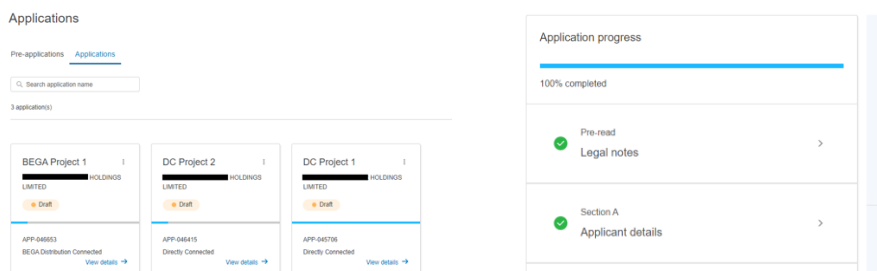
28. To submit a completed application, click on 'View details' on the application tile, then click on 'Submit' button on the top right hand of the screen. You can always review the application again before submitting.
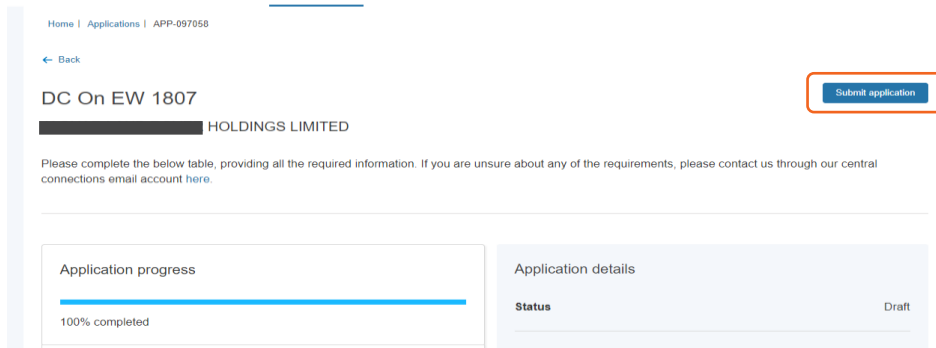
29. You will get the screen confirmation of submission of the application. Click on 'Go back to Applications' button to return to Application home screen.
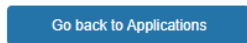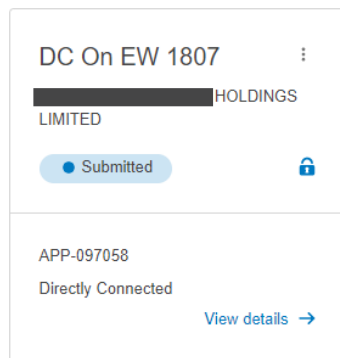

30. You will also receive an email confirmation of the application submission.

31. Application's tile will also the status as 'Submitted'.

32. You can download the completed application form in pdf format by clicking on 'View details' and clicking 'Download application' under Actions.
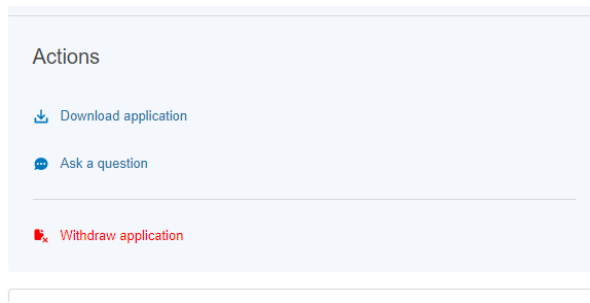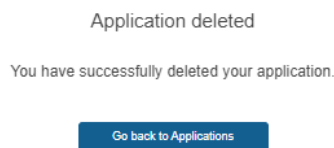
Deletion of Application

33. Application that has not been submitted can be deleted if needed. You can do this by following ways.
34. You can click on 'Three dots' at the top right corner of the application tile and select 'Delete' or you click on 'View details' and click 'Delete application' under 'Application details' section.
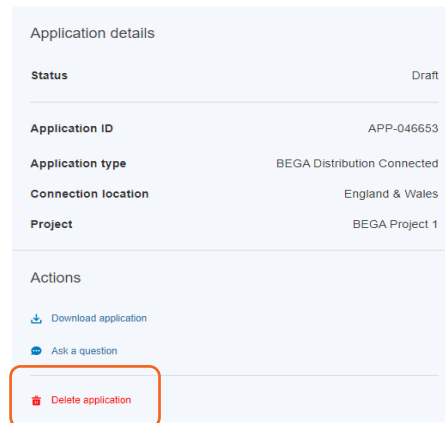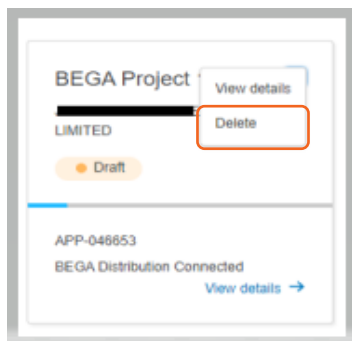
35. You will then get a pop message as shown below, click 'Delete' to delete the application or you can click 'Cancel' to go back to home screen.
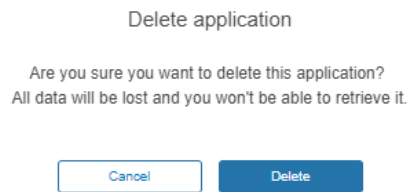

36. Please note as mentioned in the pop message above, deletion of application will result in loss of all data and deleted application will disappear from home screen.
37. Below confirmation message will appear once you click the 'Delete' button
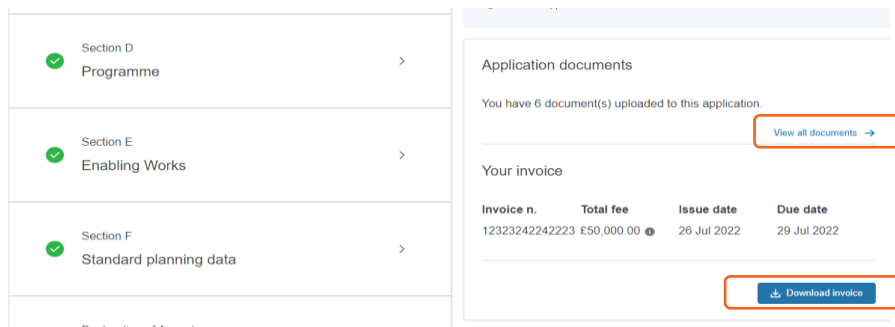
Application Progress

38. You will be able be view the application progress on the individual application' tile or by viewing details of the application.
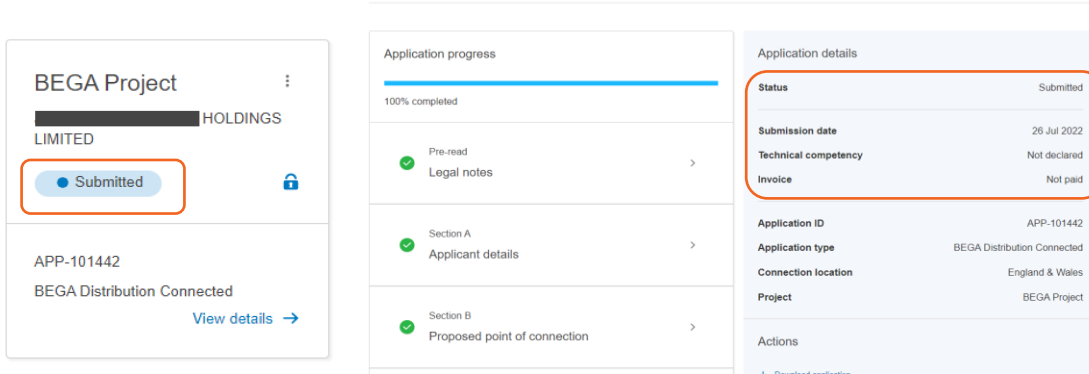

39. Status of application will change to 'Processing' when the Connection team start working on the application i,e, raising invoice, sharing details with TOs etc.
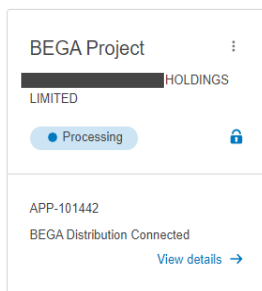

40. You will receive an email notification when the invoice is ready in the connection portal. This will be available in the application which can be accessed by clicking on 'View details' link on the application tile and then scrolling to the 'Application Documents' section. You can access it either by clicking on 'View all documents' or 'Download invoice'.


41. Once an invoice has been paid and processed, it will reflect in the application also.
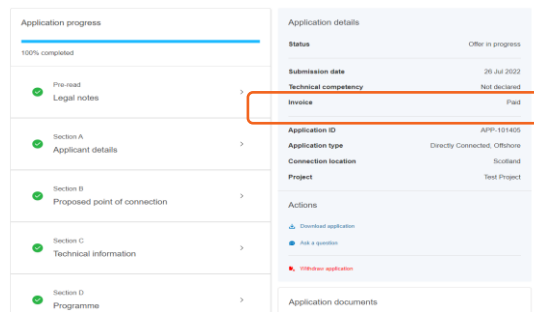
42. Once an application is clock started, the status on the application tile changes to 'Offer in Progress'. You will also receive a clock start email notification
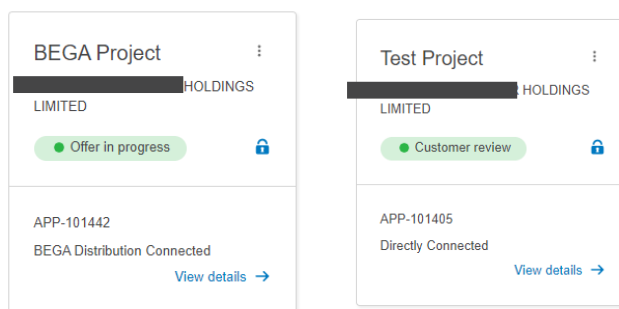

43. Once an offer has been sent to you, the status will change to 'Customer Review'.
44. Status will change to 'Contracted' when an offer has been signed by you and ESO.
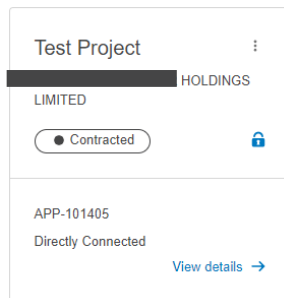
Projects

45. Once an application has been closed as Contracted i.e. offer has been signed by Customer and ESO, a Project record will be created which will be accessible under the 'Project' tab as an individual tiles.
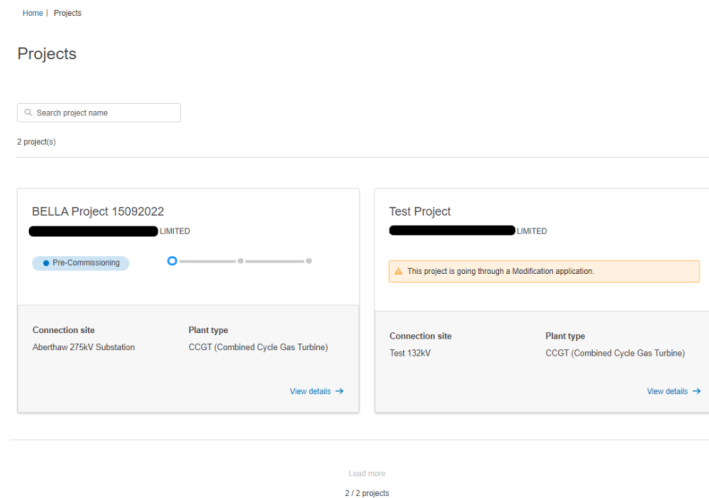
46. Clicking on 'View details' link will provide details information such as related applications, documents, timeline and contact details of CCM etc.
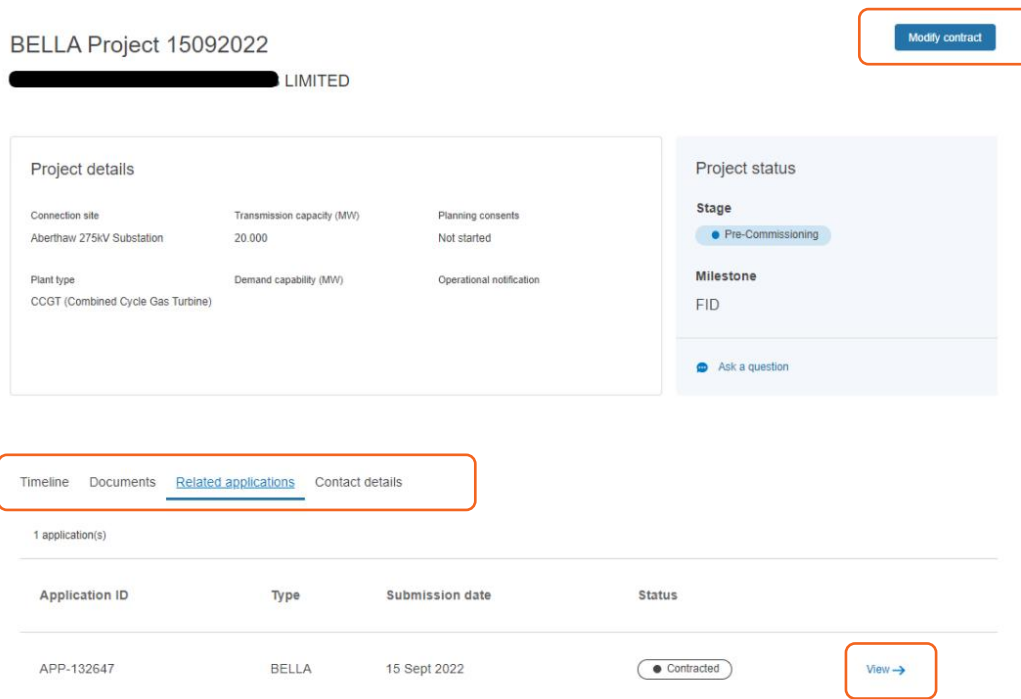
47. As marked above, clicking on individual tabs e.g. Timeline, Documents, Related application etc. will provide relevant information. There will also be links such as 'View' as shown in above picture against the application, which will help you take to that record directly.

48. From this screen, you can create modification application as required. More information on this can be found under section "Creation of application – Modification, SOW & PP".

ESO