EMR Delivery Body Portal:
Company Registration /
Company and User Management Guidance

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Contents

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1. Introduction

Any company or organisation that wishes to participate in the Capacity Market (CM) must first register in the EMR Delivery Body (DB) Portal. This ensures that an Application to participate in the CM Auctions is being made with the consent of a Director or Partner from that organisation and embeds a level of governance around the process to prevent unauthorised Applications.

A person of authority may nominate a person(s) to act as a Main Administrator (Main Admin) on their behalf, to carry out the necessary activities for their Application/Prequalification. A Main Admin can subsequently assign additional Users to assist in this process and to receive notifications.

The aim of this guide is to:

1. Explain the information required to submit a Company Registration.
2. Provide information on how to submit a Company Registration in the EMR DB Portal.

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Overview of information required for EMR Company Registration

The following information is required to complete an EMR Company Registration form:

o   Company/Organisation details: The relevant details for the company or organisation wishing to register, including company name, registered address and company registration number (if applicable).

o   Director details: An active Company Director or Company Secretary as registered with Companies House for UK registered companies (or an equivalent body for non-UK registered companies).

o   For UK companies not registered on Companies House (such as an LLP), or in the case of a body other than a company where there is not a director, an officer of that body including any authorised signatory will be accepted.

EMR DB Portal System Requirements

Recommended
PC Operating System:

Microsoft Windows
Windows 10 and later

Recommended
Internet Browsers:

Apple Safari
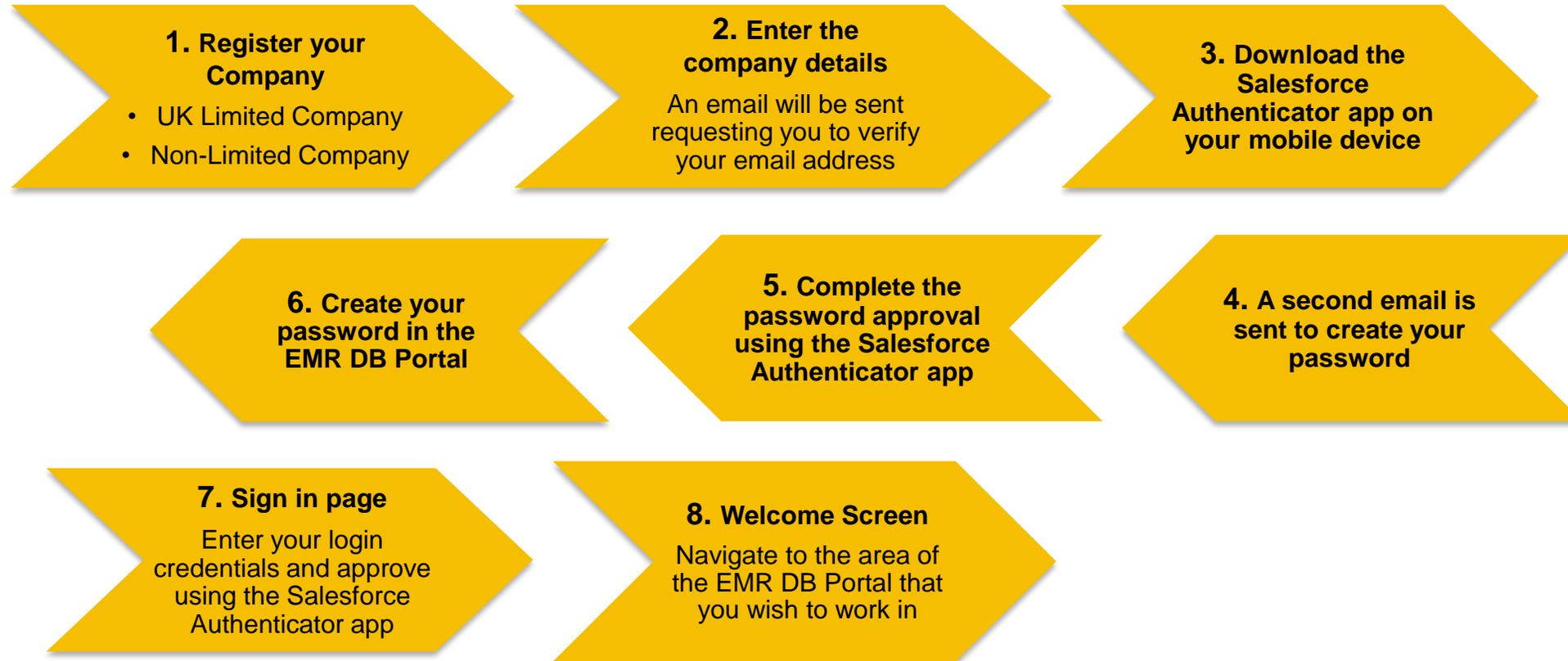**Microsoft Edge**
Google Chrome
Mozilla Firefox

If multiple file uploads are required:

Please compile files into a single PDF

Maximum file size for uploads:

3MB

Mandatory file formats:

Microsoft Office files, PDF or **JPEG**
(e.g. .docx/.xlsx/.pdf)

EMR Company Registration process

1. Register your Company
- UK Limited Company
- Non-Limited Company

2. Enter the company details
An email will be sent requesting you to verify your email address

3. Download the Salesforce Authenticator app on your mobile device

6. Create your password in the EMR DB Portal

5. Complete the password approval using the Salesforce Authenticator app

4. A second email is sent to create your password

7. Sign in page
Enter your login credentials and approve using the Salesforce Authenticator app

8. Welcome Screen
Navigate to the area of the EMR DB Portal that you wish to work in

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Single Sign-on Approach

In the new EMR DB Portal, there will no longer be a need to have a different username and password for each account that you manage.

All of your accounts will be managed using one set of login credentials.

You will administer each of your accounts under the Company Management and User Management sections of the EMR DB Portal.

Further details on Company Management and User Management can be found in slides 31 and 38 of this guidance document.

Company Registration
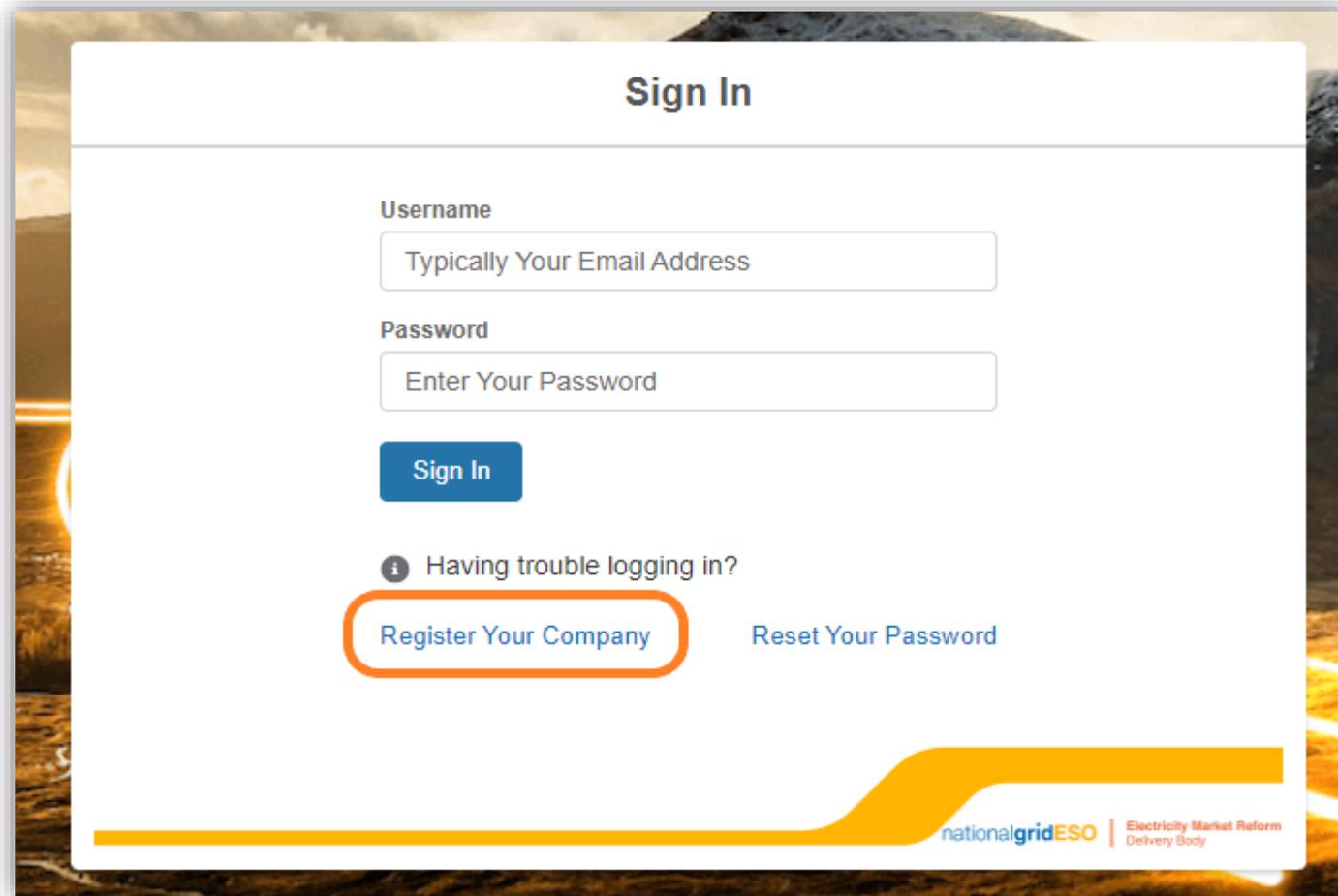
The Company Registration process begins in the same way for both Limited and Non-limited companies.

To register a company, go to the NEW EMR DB Portal (link available shortly).

Click Register Your Company

Company Registration

A new window will open showing two options:

○ Register a UK Limited Company

○ Register a Non Limited Company

A Smart phone and access to Companies House is required for this process.

Limited Company

How to register a Limited Company

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2. How To Register a Limited Company

Step 1: To register a UK Limited Company, click on Register a UK Limited Company

Note:

A company will be located if it is an active UK registered company on Companies House.

Step 2: Input the Company Registration Number and press Enter on your keyboard.

This will begin the system search for the company information direct from Companies House. It usually takes a couple of seconds to retrieve the information.

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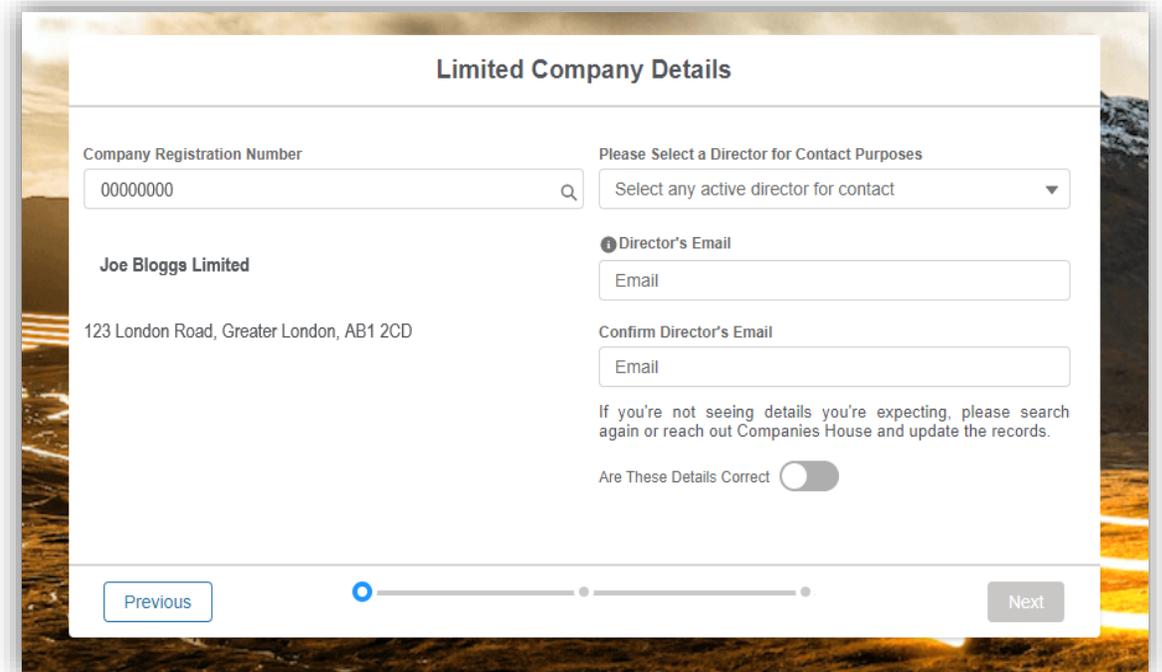
Enter the Limited Company Details

Step 3: Once located, please select a Director from the drop-down menu. Key in the Director's email address in the relevant text boxes (this is for confirmation of registration).

Click on the toggle next to Are These Details Correct

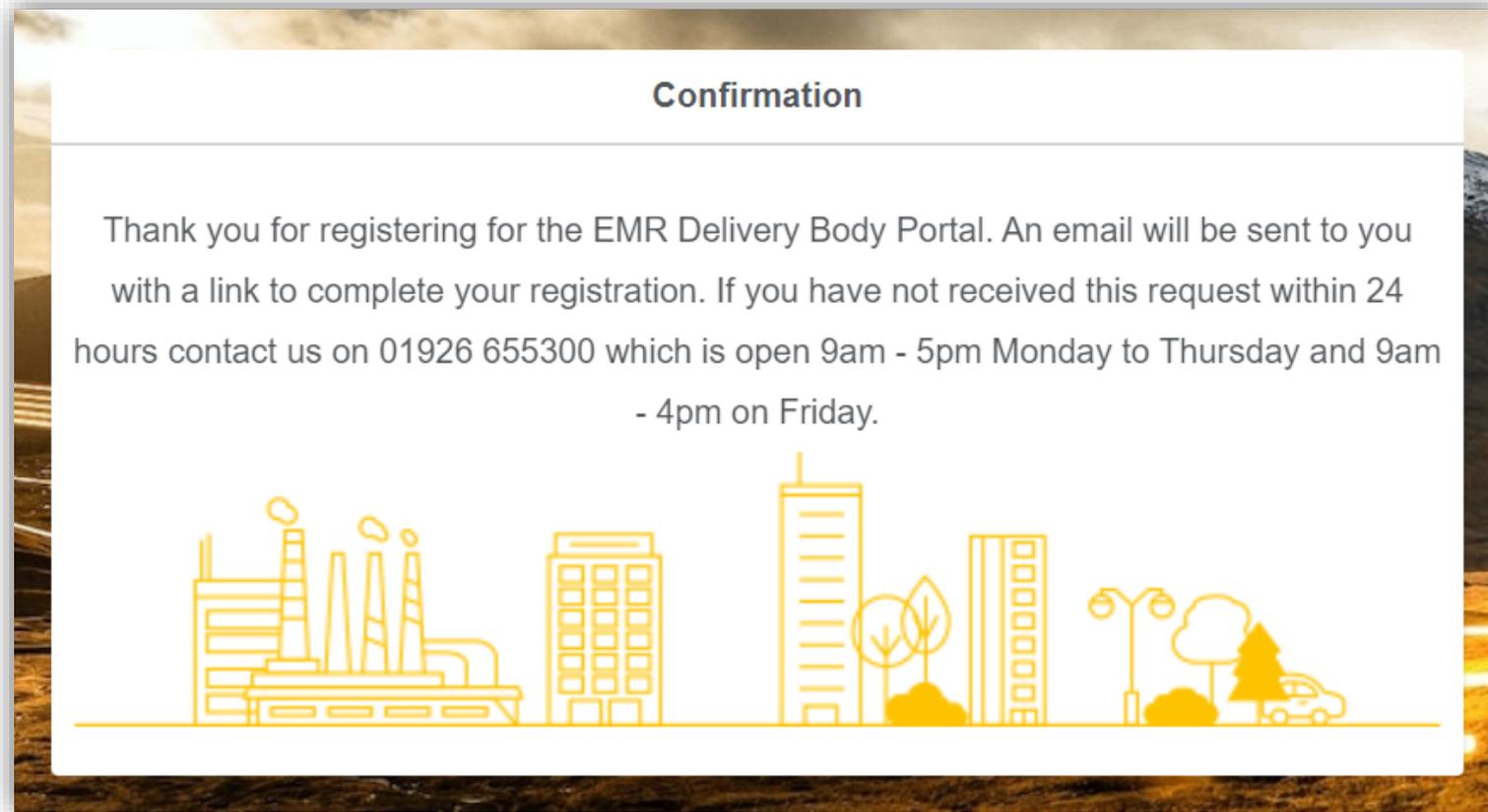Click Next

Step 4: Enter the Main Admin contact details.

Turn on the toggle next to: I confirm that I have the authority to act on behalf of *company name* in respect of the Capacity Market

Click Finish

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Registration Confirmation

Confirmation

Thank you for registering for the EMR Delivery Body Portal. An email will be sent to you with a link to complete your registration. If you have not received this request within 24 hours contact us on 01926 655300 which is open 9am - 5pm Monday to Thursday and 9am - 4pm on Friday.

A Confirmation window will open to inform you that an email will be sent for you to complete the Company Registration.

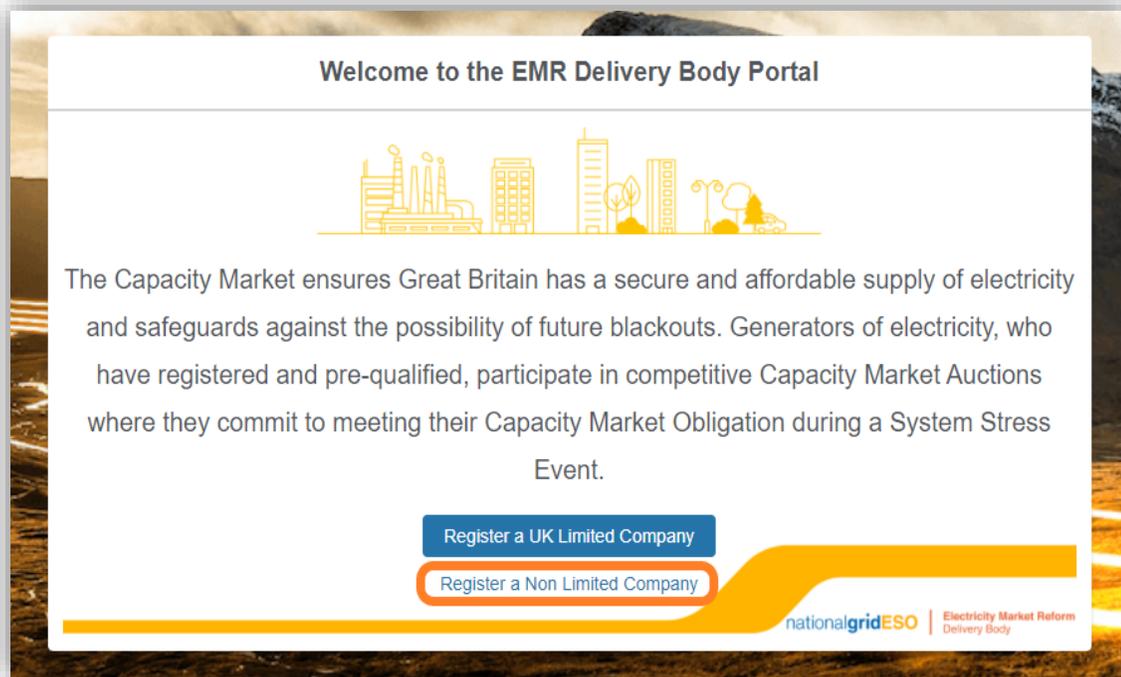Navigate to slide 21 of this guidance document to log in to the EMR DB Portal.

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Non-Limited

How to Register a Non-Limited Company

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3. How to Register a Non-Limited Company

Step 1: To register a Non-Limited Company, click on Register a Non Limited Company

Note:

Non-Limited Company Registration applications are assessed by the Delivery Body.

Step 2: Select the company Business Type from the drop-down menu and complete the company details.

Click Next

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How to Register a Non-Limited Company

Step 3: Enter the details of the Owner or Director of the company you are registering.

Click Next

Step 4: Enter the contact details for the Main Admin

Turn on the toggle next to: I confirm that I have the authority to act on behalf of *company name* in respect of the Capacity Market

Click Finish

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Registration Confirmation

Registration Completed

Thank you for registering for the EMR Delivery Body Portal. You will receive an update on your registration within 5 working days.

A confirmation window will open to notify you that the Company Registration application has been submitted to the Delivery Body for review.

If you experiencing any issues with completing a Company Registration request for a Non-Limited Company, please contact the Delivery Body by email at:
box.emr.prequal@nationalgrideso.com

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Non-Limited Companies – Supporting Documents

To complete the Company Registration application for a Non-Limited Company, you will also be required to provide supporting documents to the Delivery Body by email at box.emr.prequal@nationalgrideso.com

The documents required will depend on the structure of the registering company as follows:

Joint Venture (JV) – Confirmation on company headed paper of the company name, company address, company registration number and a signature confirming the owner/director's authority.

Partnership – Limited Liability Partnership (LLP). Confirmation on company headed paper including a copy of the agreements detailing the partnership between the companies and proof of ownership of the asset, and a signature confirming the owner/director's authority from each party.

Community Project – Confirmation on company headed paper signed by the nominated owner/director stating that they have the relevant decision-making authority, as well as any formal documents relating to the formation of the organisation, its function and organisational chart.

Foreign Company – Confirmation on company headed paper of the company name, company address, company registration number and a signature confirming the owner/director's authority.

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Post Registration

EMR Delivery Body Portal Registration

<DD/MM/YYYY>

You recently submitted a request to register <Company DEF> to EMR Delivery Body Portal. The information you provided has now been reviewed and has been successful.

To complete your registration please log into the Portal and add your Company details.

Thanks,

National Grid (ESO) – EMR Delivery Body

Following review by the Delivery Body of a Company Registration application for a Non-Limited Company, if it is successful, you will receive an email inviting you to log into the EMR DB Portal.

If for any reason a Company Registration is rejected by the Delivery Body, you will be notified by email of the reason(s).
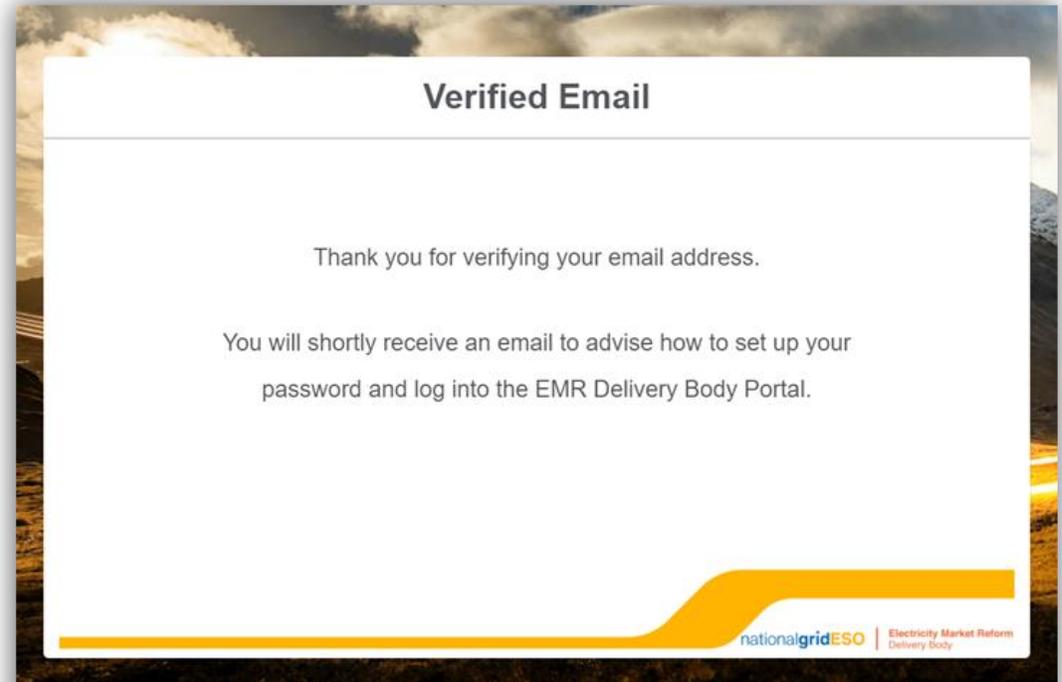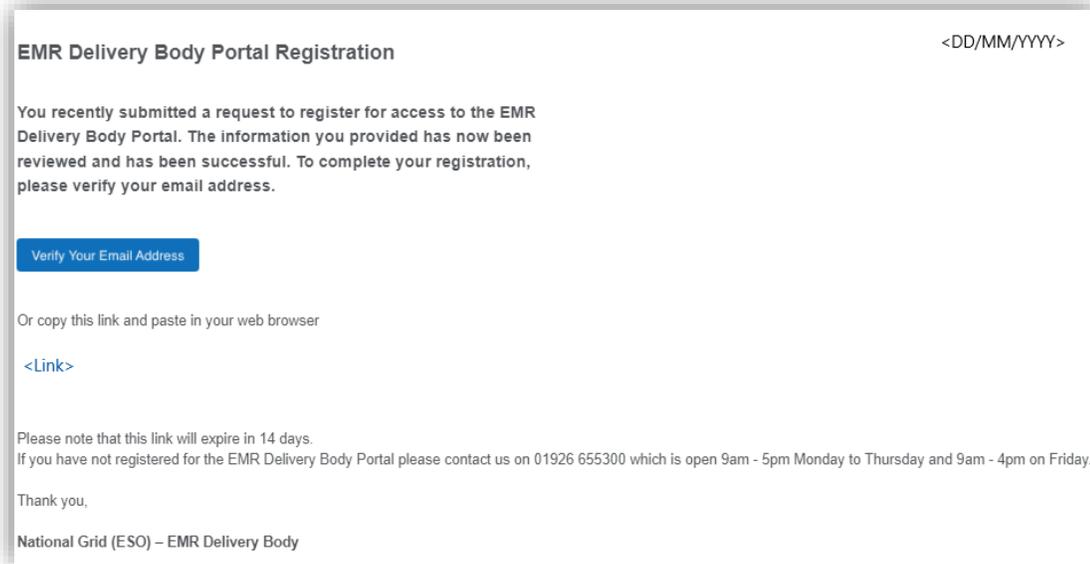
Should you wish to discuss why a Company Registration has been rejected, please contact the Delivery Body by email: box.emr.prequal@nationalgrideso.com

You will have the opportunity to resubmit an amended Company Registration application.

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Logging in

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4. Verify your email address

Once a company has successfully been registered in the EMR DB Portal, you will receive an email inviting you to verify your email address.

Step 1: Click Verify Your Email Address or paste the link into your browser.

A pop-up message will appear confirming that your email address has been verified.

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Salesforce Authenticator App Download

Thank you for registering for the EMR Delivery Body Portal Registration

<DD/MM/YYYY>

Your username is <email address>

To access the EMR Delivery Body Portal you will need to set up a password. As part of the password creation process you will need to use the Salesforce Authenticator app. First download the app from your mobile app store.

GET IT ON Google Play

Download on the App Store

Salesforce Authenticator
Salesforce.com, inc.   Business
⚡ Everyone
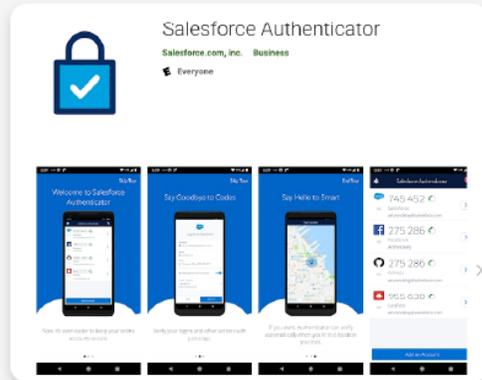
You will also receive an email asking you to set up a password for the EMR DB Portal. Please check your Junk folder if you do not receive an email.

As part of our improved security measures, in order to log into the EMR DB Portal, you will need to use the Salesforce Authenticator app.

Step 2: On your mobile device, either click the link in the email for the relevant app store to download the Salesforce Authenticator app or go directly to the App Store.

Note:

Every time you log in to the EMR DB Portal, you will need to approve your access through the Salesforce Authenticator app. A push notification from the app will automatically trigger so please ensure your app settings allow notifications.

See this article to learn more about your mobile app notification settings for iOS and Android.
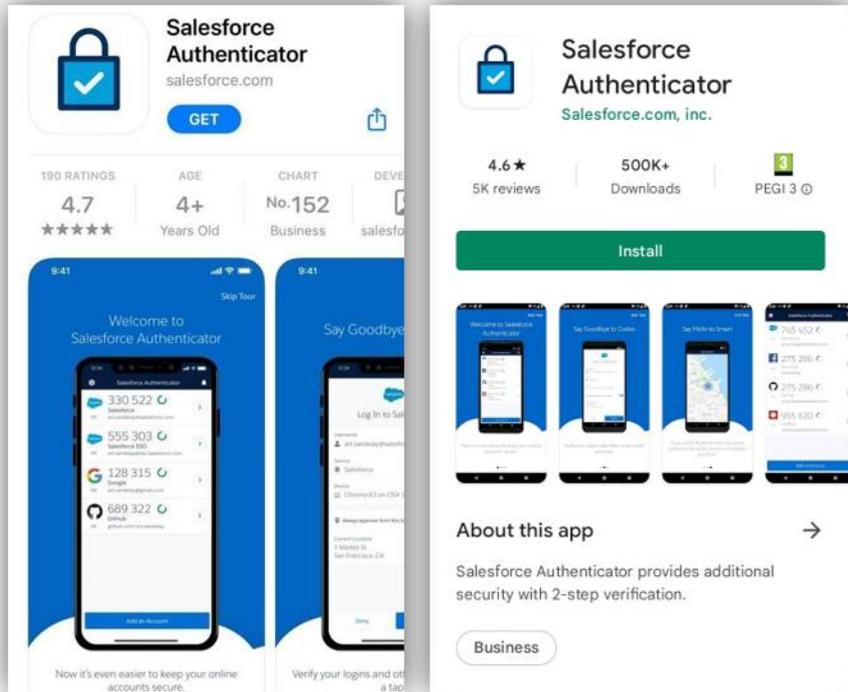
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Password Creation

Once you have successfully installed the Salesforce Authenticator app, you can then create your password.

Step 3: Click Create Your Password in the email.

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Password Creation

A new browser window will automatically appear to allow you to set up your new password to access the EMR DB Portal.

Step 4: You will be prompted to create a password for the EMR DB Portal.

Step 5: Once you have created a password that meets the requirements, select Change Password

Logging in

You will be redirected to the Sign In page where you can log in using the username sent to you via email and the password you have just set up.

Step 6: Enter your username (supplied in the successful registration email) and password.

Click Sign In

Connect Salesforce Authenticator
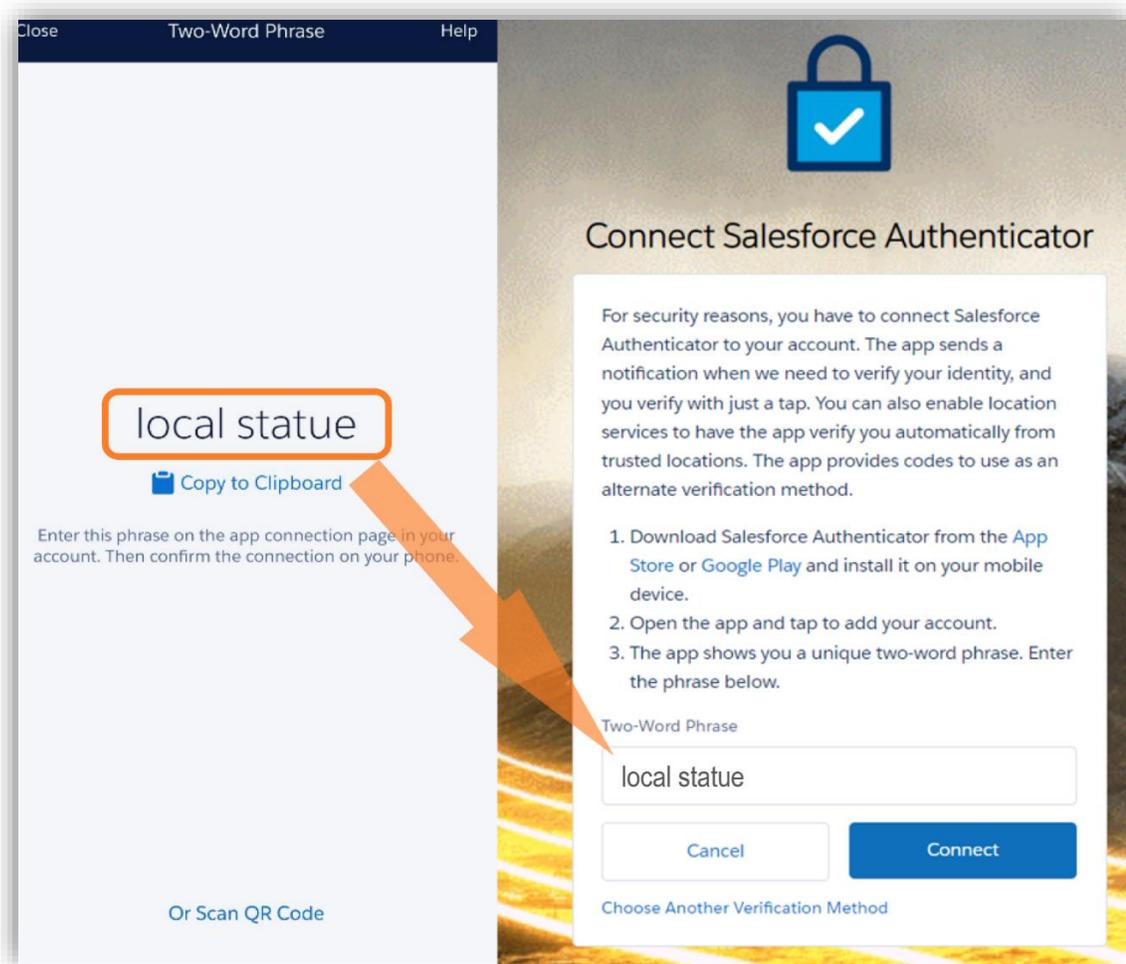
In order to complete the sign in, you will need to connect Salesforce Authenticator to your EMR DB Portal account.

Step 7: Open the Salesforce Authenticator app.
Click Add an Account (located at the bottom of the app screen).

Step 8: Enter the words shown under Two-Word Phrase into the text box on your browser screen.

Step 9: Click Connect

Connect Salesforce Authenticator
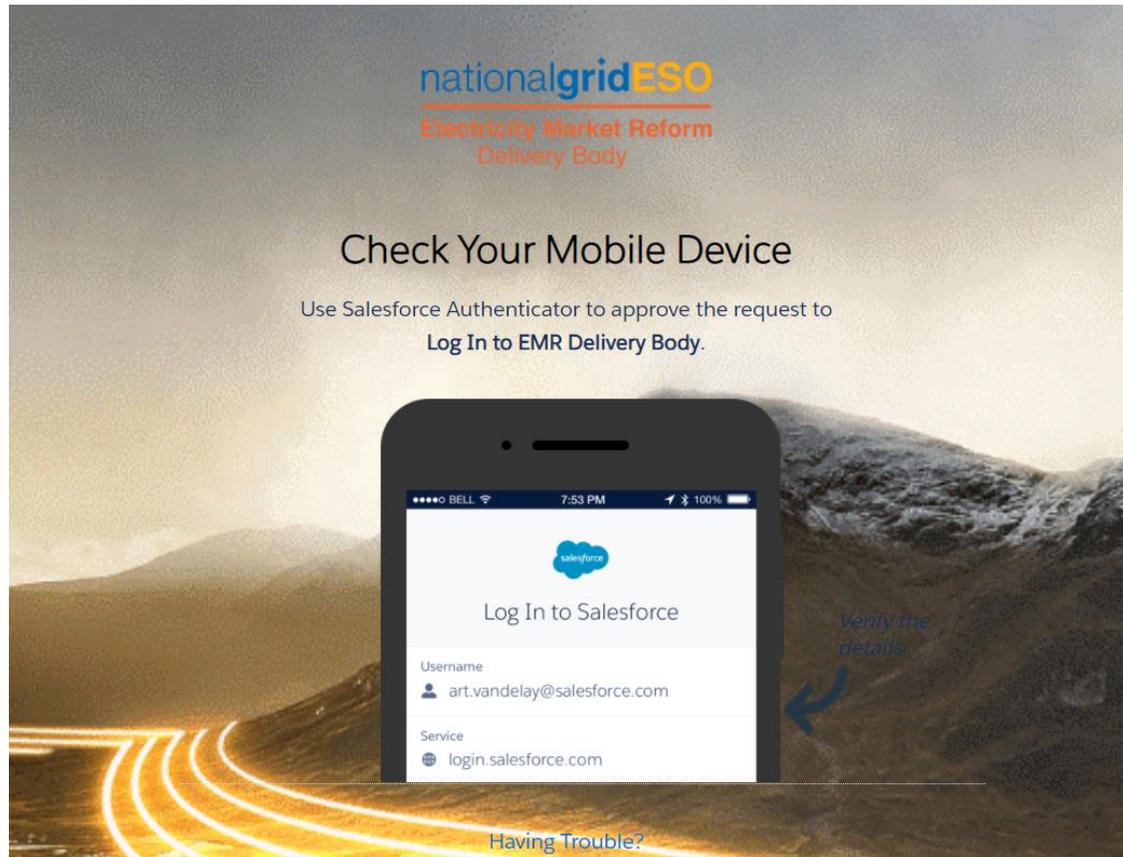
The screen on your Salesforce Authenticator app will change to include your EMR DB Portal username and the service name (Salesforce).

Step 10: Click Connect in the Salesforce Authenticator app.

The screen on the Salesforce Authenticator app will change again.

Step 11: Select Approve in the Salesforce Authenticator app to approve the connection.

Salesforce Authentication
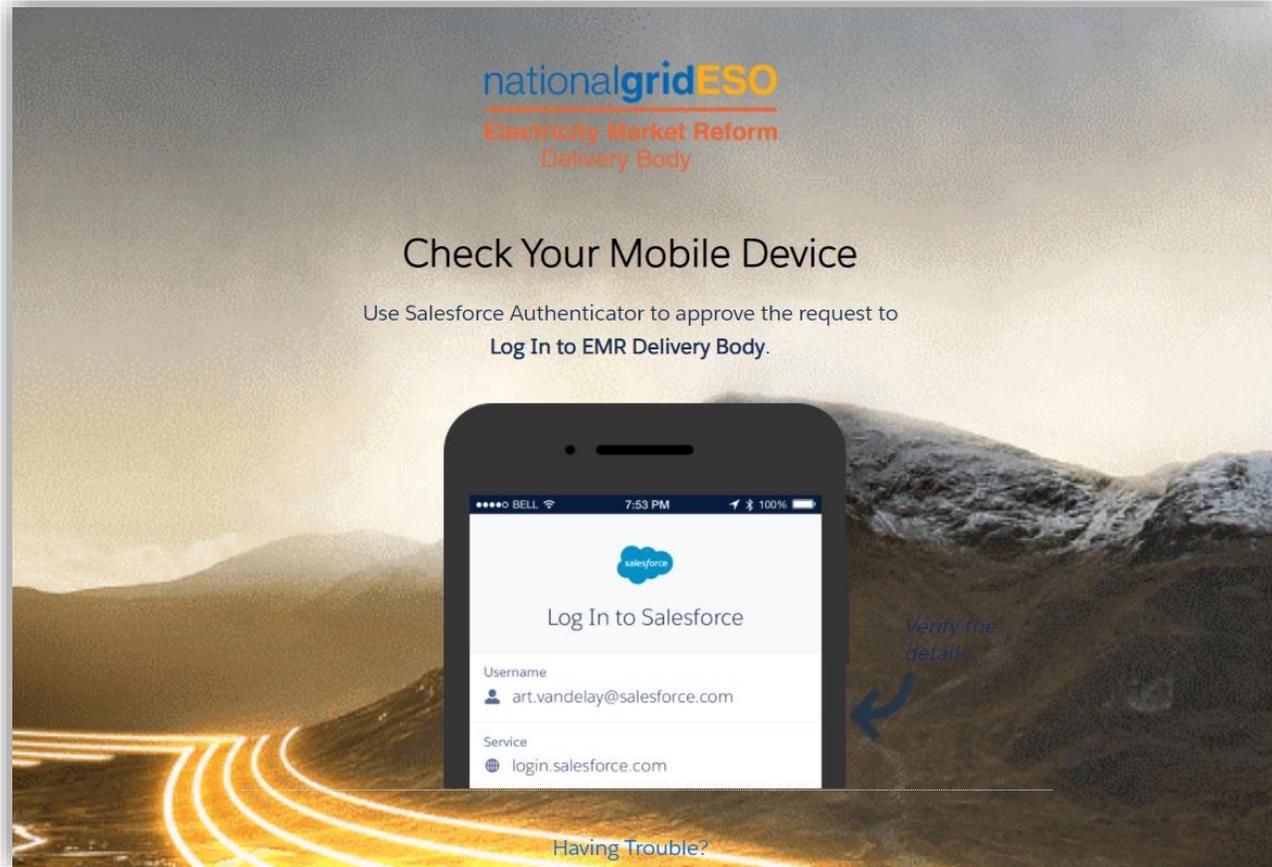
Step 12: You will receive a notification alerting you to check your mobile device.

Step 13: Select Approve in the Salesforce Authenticator app in order to approve the login.

When you approve the connection through the Salesforce Authenticator app, you will also receive an email with the similar subject: A new verification method was added to your EMR Delivery Body account.

Welcome Screen

Welcome to the EMR Delivery Body Portal

To create/manage additional users select User Management.
To add further information about your company, or to tell us about
additional companies, select Company Management.

Once you have successfully logged into the EMR DB Portal, you will see the welcome screen.

From here, you can navigate to the User Management and Company Management areas of the EMR DB Portal.

Company Management

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5. Adding an Additional Company

Step 1: In the top left of the welcome screen, select Company Management

This will take you to the screen which lists all companies associated with the account.

Step 2: Click Add A Company in the top right of the screen.

Adding an Additional Limited Company

In the next screen, select whether it is a Limited or Non-Limited Company.

To register a Limited company:

1. LTD Company will automatically be pre-selected.

2. Input the UK Company Registration Number and press Enter on your keyboard to start the company details search.

3. Select a Director from the drop-down menu and the Director's email address. Click on the toggle next to These Details Are Correct to confirm the details.

4. Click Save

Adding an Additional Non-Limited Company

To register a Non-Limited Company:

1. Select NON Limited Company

2. Select Business Type from the drop-down menu and enter the Business Name

3. Complete the Owner / Director contact and the company address details.

4. Click Save

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Company Overview Page

After registering a new company in the EMR DB Portal, your browser will automatically refresh showing the Company Management tab.

The company that has been added will show as a new entry in the list.

Managing Company Details

Company Management

A Company Certificate of Incorporation, VAT number and Secondary Trading details can be added directly into the EMR DB Portal in the Company Management area.

Step 1: Navigate to Company Management. A list of all companies that the User can edit will be displayed.

Step 2: Click on the three vertical dots on the right of the Company Name.

Secondary Trading Details and File Upload

A new screen will appear which will show the Registered Company Information on the left and Secondary Trading details on the right.

1. Enter the Secondary Trading Landline number, email address and confirm email address.

2. Toggle the switch Are you Registered for UK VAT? (if the company is registered for UK VAT).

3. Enter the company's UK VAT Registration number (if applicable).

4. Select Upload Files to add the Certificate of Incorporation, paying attention to the onscreen details outlining file type and size.

5. Once all the mandatory fields are filled in, click Save & Close

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User Management

6. User Types and Privileges – Main Admin

The Main Admin for each company should ordinarily be the person with managerial responsibility for the day-to-day participation in the Capacity Market.

o The Main Admin will be responsible for the adding, editing and removing other Users within an organisation, and for the creation of additional companies if required. They will also act as the main point of contact for any communications from the Delivery Body. There can only be one main admin listed per company in the EMR DB Portal.

o The Main Admin and Deputy(s) can edit User privileges in the EMR DB Portal for all the relevant Users linked to a company. If a person leaves the company, it is the responsibility of the Main Admin to deactivate them on the EMR DB Portal.

o It is permissible for the Director of a registered company or organisation to also be the Main Admin.

o Main Admins have read and write permission by default.

User Types and Privileges – Deputy

A Main Admin can register additional Users who can log into their company's area of the EMR DB Portal and carry out specific roles.

Each of these Users must be given privileges to carry out specific roles.

A Main Admin can register a Deputy(s):

o   A Deputy has the same privileges as a Main Admin. They can create additional companies, CMUs, other Users and can also make amendments to existing data.

o   A Deputy cannot change the details for a Main Admin but they can change other Deputy and User details.

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User Types and Privileges – User

A Main Admin or Deputy can create other Users to log into the Company Management area of the EMR DB Portal and carry out specific tasks.

These Users can act on behalf of a main company or additional companies where they have been assigned the relevant privileges.

If a User is assigned Read Only privileges:

1. They can only view information for the company they are related to in the system.
2. They cannot see any other User details except their own.

If the User is assigned Read and Write privileges:

1. They can view and edit the information of the company they are related to.
2. They cannot see any other User details except their own.

User Management

Click User Management on the top left hand side of the welcome screen.

This page will list all Users who are assigned to each account for which you are Main Admin and will include their role and privileges.

Add A New User

Users with the relevant permissions can create new Users in the EMR DB Portal.

Step 1: To create a new User, navigate to the User Management tab.

Step 2: Click Add user

This will open a new screen where you can input the details for a new User (see overleaf).

Note:

The first User that must be created by the Main Admin is the Deputy. Once this is done, as many Deputies and Users as required can be created.

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Add a New User

Note:

An Authorised Individual is a User that has the authority to place bids in the CM Auctions. Each Bidder may have up to four Authorised Individuals.

Step 3: Enter the details of the new User.

Role

Click on the drop-down menu, select whether the new User is Main Admin, Deputy or User.

Privileges

Click on the drop-down menu to customise whether the User has Read Only or Read and Write access to the EMR DB Portal. Make sure to check the toggle if they are an Authorised Individual.

Step 4: Click Save & Close

The new User will now receive an email inviting them to verify their email address and should follow the process from Slide 21 onwards to set up their login details.

Agent Nomination

Step 1: To add a nominated agent, navigate to the User Management tab.

Step 2: Click Add Nominated Agent in the top right of the screen.

This will open up a new screen that will allow you to fill in the Nominated Agent details.

Agent Nomination

User First Name

Alex

User Last Name

Reed

Email

alex.reed@smithslimited.com

Confirm Email

alex.reed@smithslimited.com

Contact Mobile Number

United Kingd... | 44 | 00000000(

Contact Landline Number

United Kingd... | 44 | 00000000(

Role

User

Privileges

Read & Write

Primary Company

Bob Smith Limited

Assign Additional Companies

1

Authorised Individual

Save & Close

Note:

Exhibit E is only applicable to a Nominated Agent and must be provided as part of a Prequalification Application for review by the Delivery Body.
It is not required at the point of nominating an Agent in the EMR DB Portal.

1. Enter the details for the Nominated Agent.

   The system defaults the Role of an Agent to that of a User, however you can still select the privileges an Agent will have.

2. Toggle to select if the User is an Authorised Individual.

3. Select Save & Close

   To deactivate or edit Nominated Agent details, go to slide 47

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User Management Page Navigation

The User Management page contains options to make the search and management of Users easy.

1. Display toggle: Allows you to switch between the lists of Active Users and Deactivated Users. Active Users view is the default.

2. Filters: Allow you to filter the list of Users by the company(s) that Users are related to, their Role and EMR DB Portal privileges.

3. Search Active Users: Allows you to search a list by a User's first or last name.

4. Sort function: Allows you to sort your data alphabetically for qualitative values (e.g. First Name or Last Name) and Low to High / High to Low for numeric values, e.g. Companies.

Edit or Deactivate a User

To Edit User data and/or permissions or to deactivate a User:

Step 1: Navigate to the User Management tab and search for the User in the list that you need to amend.

Step 2: Click on the three vertical dots on the right hand side of the User's name which allows you to edit the details.

Edit or Deactivate a User

A new screen will appear where you can change attributes such as First Name, Last Name, Contact Telephone Numbers, Role, Privileges, Primary Company and assign additional companies.

1. Authorised Individual toggle is used to indicate that a User is an individual that has the authority to place bids in the CM Auctions. Each Bidder may have up to four Authorised Individuals.

2. Active User toggle allows you to activate and deactivate a User. When a toggle is grey, it means a User is inactive. A blue toggle with a white checkmark means the User is active and can access the EMR DB Portal.

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Version Control

The table below shows the page numbers of any changes made to the document for each version.

Version	Changes	Pages	Date
1.0	Original Document	-	22/02/2022
2.0	• Maximum file size – 3MB not 35MB • Screenshots updated • Exhibit E not required at this stage – text updated to reflect this • Changed Deputy Main Admin to Deputy	5 7, 41, 42, 44-47 45 38-40, 42, 43	24/02/2022
3.0	• Updated the screenshot from CM Portal to EMR DB Portal • Re-ordered the sequence of the Salesforce Authenticator and Change of Password process • Specified an Agent can only be a User	9 24-28 45	03/03/2022

Version Control

The table below shows the page numbers of any changes made to the document for each version

Version	Changes	Pages	Date
4.0	Clarification on how a new User should complete their login details	43	30/03/2022

If you have any questions or concerns about anything described in this document, please contact us at box.emr.prequal@nationalgrideso.com

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