

User Guide

Single Market Platform Portal

April 2024

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1. Introduction

1.1. Document Purpose

The purpose of this document is to help readers access, navigate and use the Single Market Platform (SMP) Portal to enable Balancing Service Providers and Agents market entry to engage in Balancing Services. This includes the administrative functions, initial registration and onboarding, submission & management of Assets and their respective Units including the Versioning of Units & Assets, Management of the Pre-qualification Application Process, Managing Secondary Users and Establishing Related Entities. Moreover, the document illustrates the detailed steps entailed in key functionality of the Portal.

1.2. Background to SMP

Customer and stakeholder feedback highlighted substantial opportunities to transform our interactions at all stages in market participation with the Electricity System Operator (ESO). As we transition and transform our markets to closer to the day procurement, Single Market Platform (SMP) will be the go-to place for market entry and participation; it will facilitate participation in new smart and sustainable markets, aiming to lower barriers to entry, attracting higher volumes, ensuring new technologies are onboarded faster, markets are cleared, and payment is made swiftly and accurately. As we transition and transform our markets to closer to the day procurement, SMP will be the go-to place for market entry and participation; it will facilitate participation in new smart and sustainable markets, aiming to lower barriers to entry, attracting higher volumes, ensuring new technologies are onboarded faster, markets are cleared, and payment is made swiftly and accurately.

As stated in our RIIO-2 business plan, SMP will provide a single point of entry for market participants to access data related to: how they can become a provider, how they can sell their services in a co-optimised way, how they can manage the lifecycle of their contractual relationship with ESO, review how they are performing (both operationally and financially).

1.3. Supported Browsers

For the best experience, we recommend that the latest version of **Chrome** is used to access the portal, otherwise key functionality may not render on screen.

We do not recommend any version of Internet Explorer as this site has not been designed to use this browser and therefore you may encounter errors.

1.4. Requirement for Use

Access to the internet and a phone to receive two factor authentication codes.

1.5. Disclaimer and Applicant's Responsibility

The information supplied with, contained in, or referred to in this Document, and all other information is given in good faith. However, no warranty or representation or other obligation or commitment of any kind is given by National Grid, its employees or advisors as to the accuracy or completeness of any such information or that there are not matters material to the arrangements and matters referred to therein other than is contained or referred to in such information. Neither National Grid nor its employees or advisors shall be under any liability for any error or misstatement or as a result of any failure to comment on any information provided by National Grid or the recipient of the Documentation or any other person or any answers to any questions or for any omission and none of such information shall constitute a contract or part of a contract.

1.6. Help and Support

For any queries on registering and completing a *User Registration & Login* should be sent to Box.digitalhelp@nationalgrideso.com. For any queries relating to any other Functionality in this guide should be sent to commercial.operation@nationalgrid.com or you can contact the team on 01926 65 4611. For any technical issues, you can contact the helpdesk on +44 800 917 7111.

2. Initial Registration & Onboarding

With Release 2.8, a new Registration and Login Framework is being adopted and rolled out across the NG ESO Estate, including access to the Single Market Platform. This change is called the introduction of a **Customer Access and Identity Management System** (SSO) which will allow both prospective users to register and existing users to login using a **Single Sign-On** Functionality which will have Authentication built in. In short users will be expected to log in using their email address and use a Mobile Phone Number to authenticate. This will grant them access to their individual universal ESO Account.

The new Universal ESO Account will in the future enable users to sign in to all ESO Systems using the *same set of credentials included but not limited to the following platforms*.

- Single Market Platform (SMP)
- Enduring Auction Capability (EAC)
- Data Analytics Portal (DAP)

Users will now be provided with a centralised touchpoint or gateway for their ESO Account on the ESO Website and will be able to manage or update their Account Details and communication preferences including data subscriptions from the one location.

2.1. First-time User Registration

If you and your organisation/company are new to NG ESO and to the SMP Portal, then it is required that you register directly by navigating to the new ESO Website.

If you or your colleagues have previously completed registration prior to SSO and were able to login into the SMP Portal directly, your SSO credentials **will be set up on your behalf in advance and you will only be required to reset your password and supply a mobile number** if not previously provided in order to enable you to authenticate. **Your username will be the email address** you originally supplied at the point of registration for the SMP Portal.

If you are a user whom has several SMP Account Login's, a **'primary' Account will be identified and this will be the Account for whom your SSO credentials will be set up in advance**. For the 'secondary' or additional Account(s) you will continue to be able to use your **existing SMP Portal Username** to login via the new ESO Website. You will be prompted to change your password. You will be prompted for a mobile number to enable you to authenticate. **This can be the same mobile number** as for your primary account.

Please note that all *prospective additional Users* for Accounts where at least one Active User exists can still be added to the same Account however the process has altered from previous Releases and will be explained in full detail on the Chapter *'User Management'*.

2.2. First-time User Registration

- Navigate to the **Register Now** Link

Figure 2.2.1

ESO

Sign in to your ESO account

Continue with Microsoft

or

Email

Email

Password

Password

Sign in

Cancel

Forgot password?

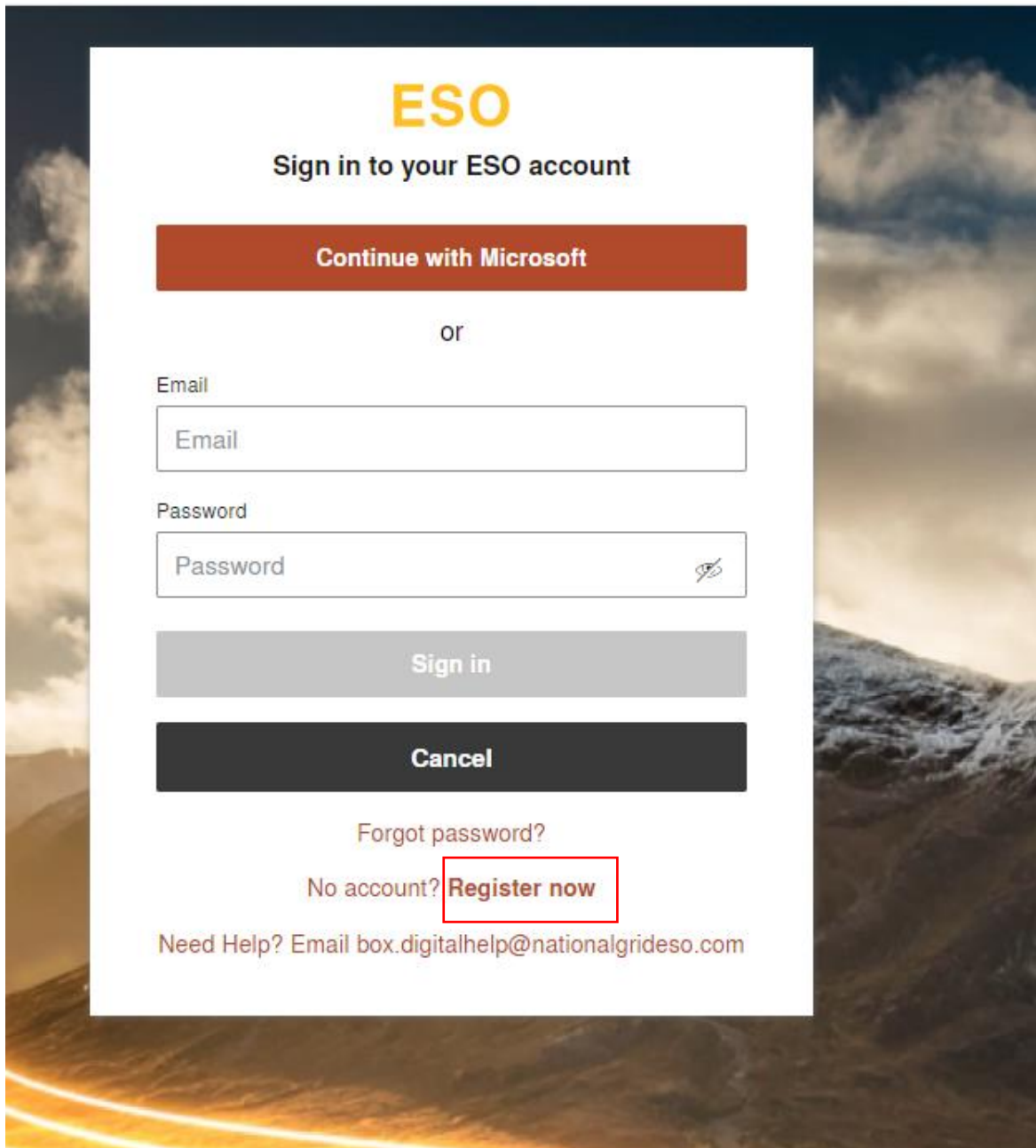
No account? **Register now**

Need Help? Email box.digitalhelp@nationalgrideso.com

The section below will illustrate the steps required for First Time User Registration

- Prospective Users must visit the ESO Website and will be presented with the screen below.

- Select 'Register now'

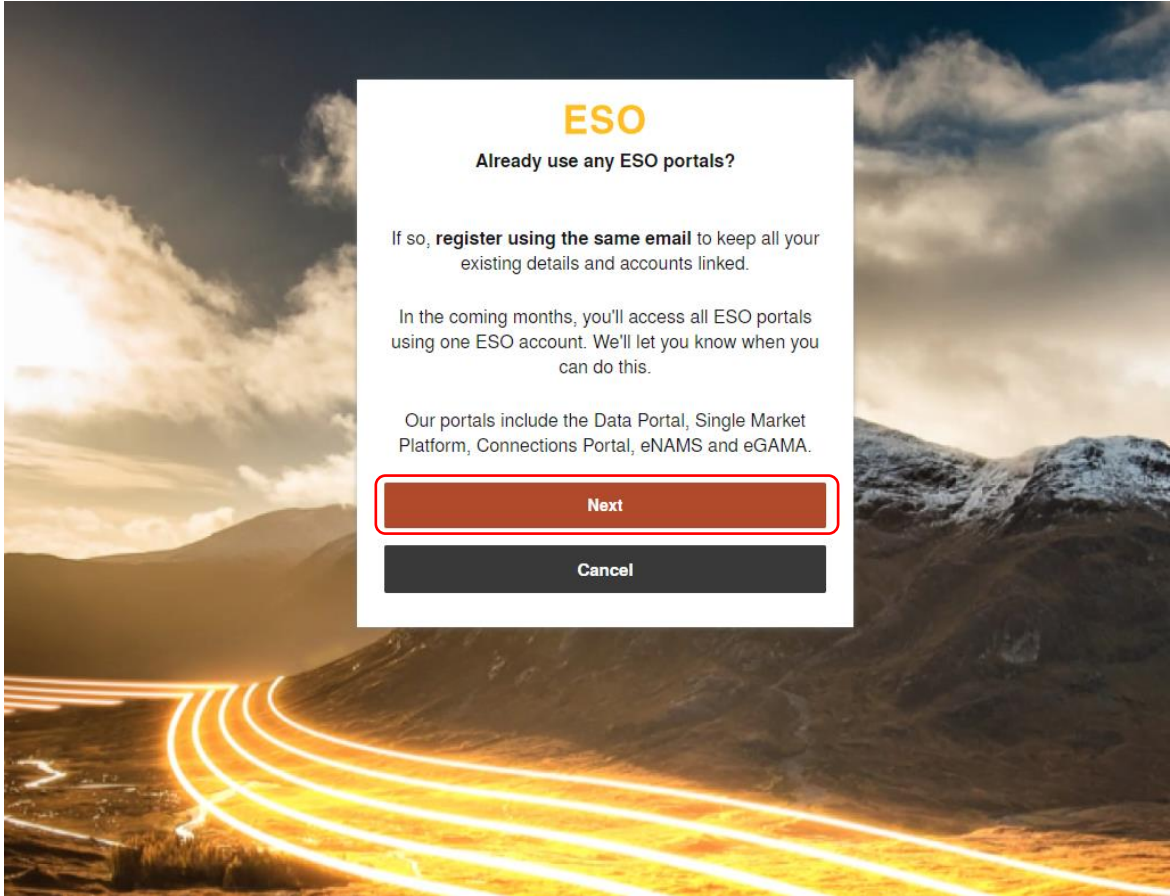


#

2.3. First-time/New Prospective User Registration

- Click Next

Figure 2.2.2



ESO

Already use any ESO portals?

If so, **register using the same email** to keep all your existing details and accounts linked.

In the coming months, you'll access all ESO portals using one ESO account. We'll let you know when you can do this.

Our portals include the Data Portal, Single Market Platform, Connections Portal, eNAMS and eGAMA.

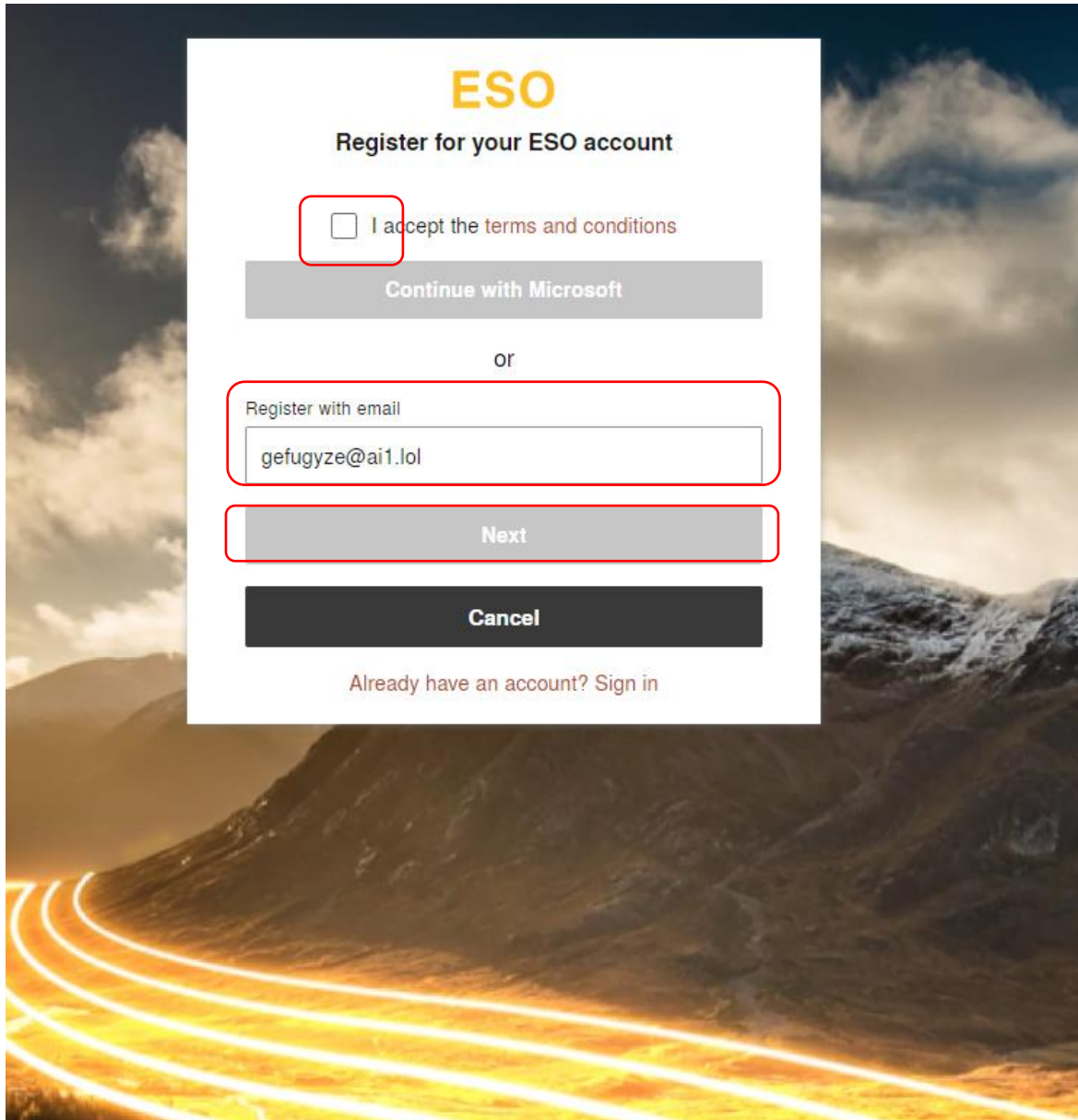
Next

Cancel

2.4. First-time/New Prospective User Registration

- Enter your Email Address
- Right click the 'terms and conditions' hyperlink to open up in a new tab.
- Read through the terms and conditions and switch back to the main tab.
- Click the checkbox 'I accept the terms & conditions' in order to enable you to proceed to the next screen.
- Select 'Next'. If you wish to abort the process then click on 'Cancel'.

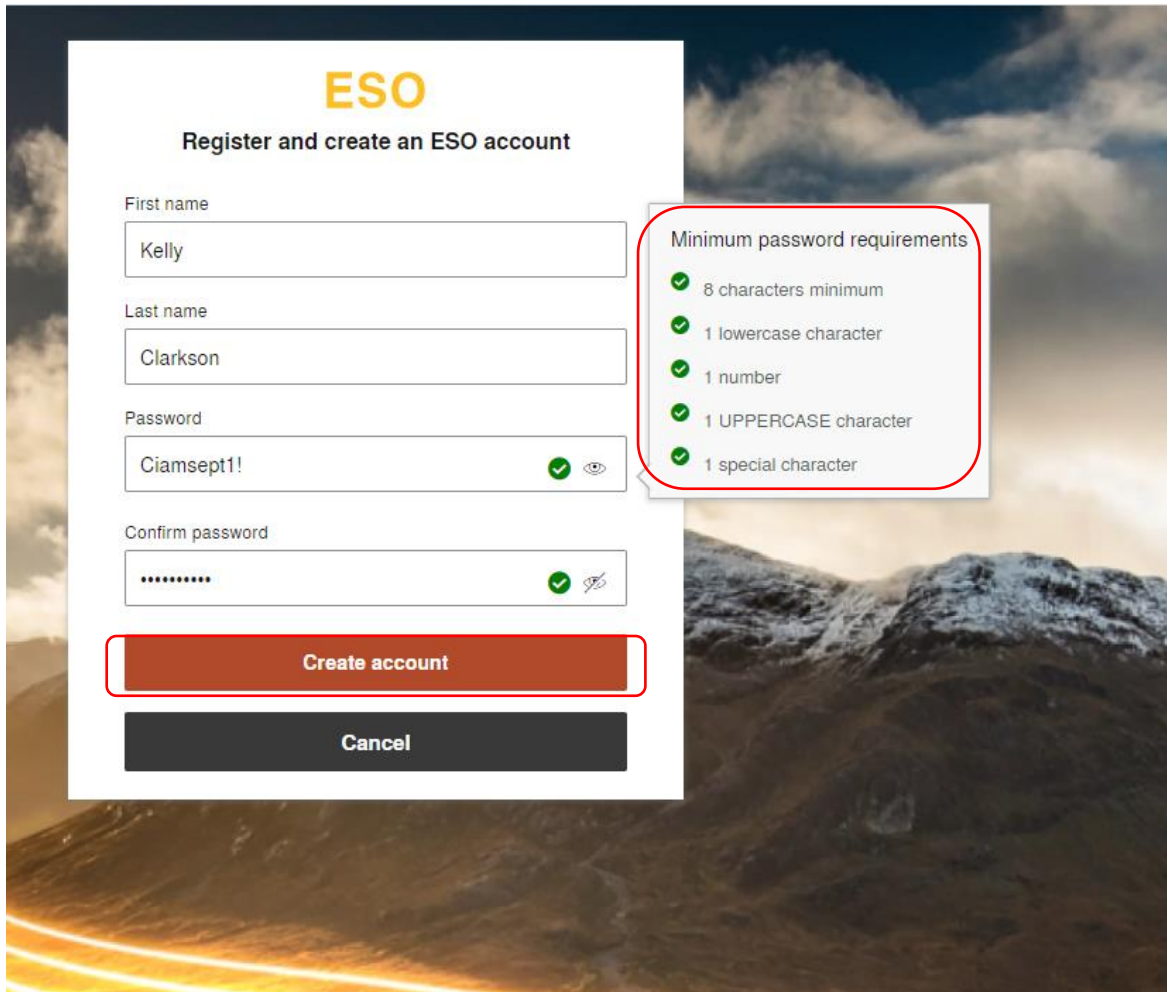
Figure 2.2.3



2.5. First-time/New Prospective User Registration

- Enter your Contact Details; First name, Last name and Password.
- Re-enter your password to confirm it is correct.
- Ensure you comply with the Minimum Password Requirements
- Click the custom button 'Create Account' if you wish to complete your User Registration
- Select 'Cancel'. If you wish to abort the process..

Figure 2.2.5



ESO
Register and create an ESO account

First name
Kelly

Last name
Clarkson

Password
Ciamsept1! ✓

Confirm password
..... ✓

Create account

Cancel

Minimum password requirements

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

2.6. First-time/New Prospective User Registration

- Enter your Verification Code which will automatically be sent to the Email Address provided prior.
- Click the custom button 'Verify' to proceed.
- Select 'Cancel'. If you wish to abort the process
- If a Verification Code Email isn't received within a couple of minutes within your inbox, please check your spam or junk mail first and then click the '*Didn't receive an email? Resend*' hyperlink.

Figure 2.2.6

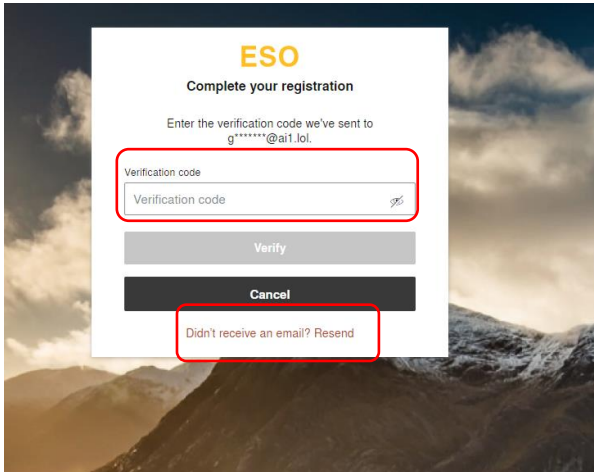
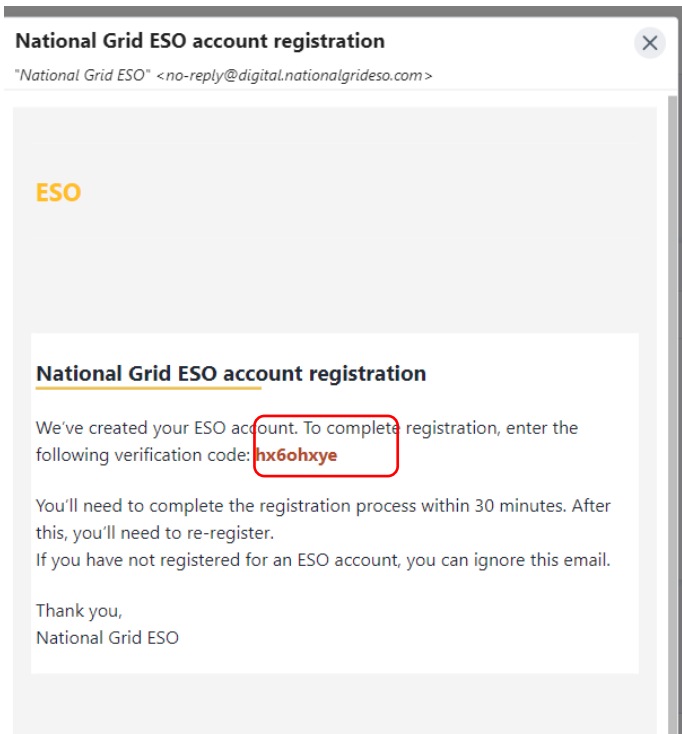


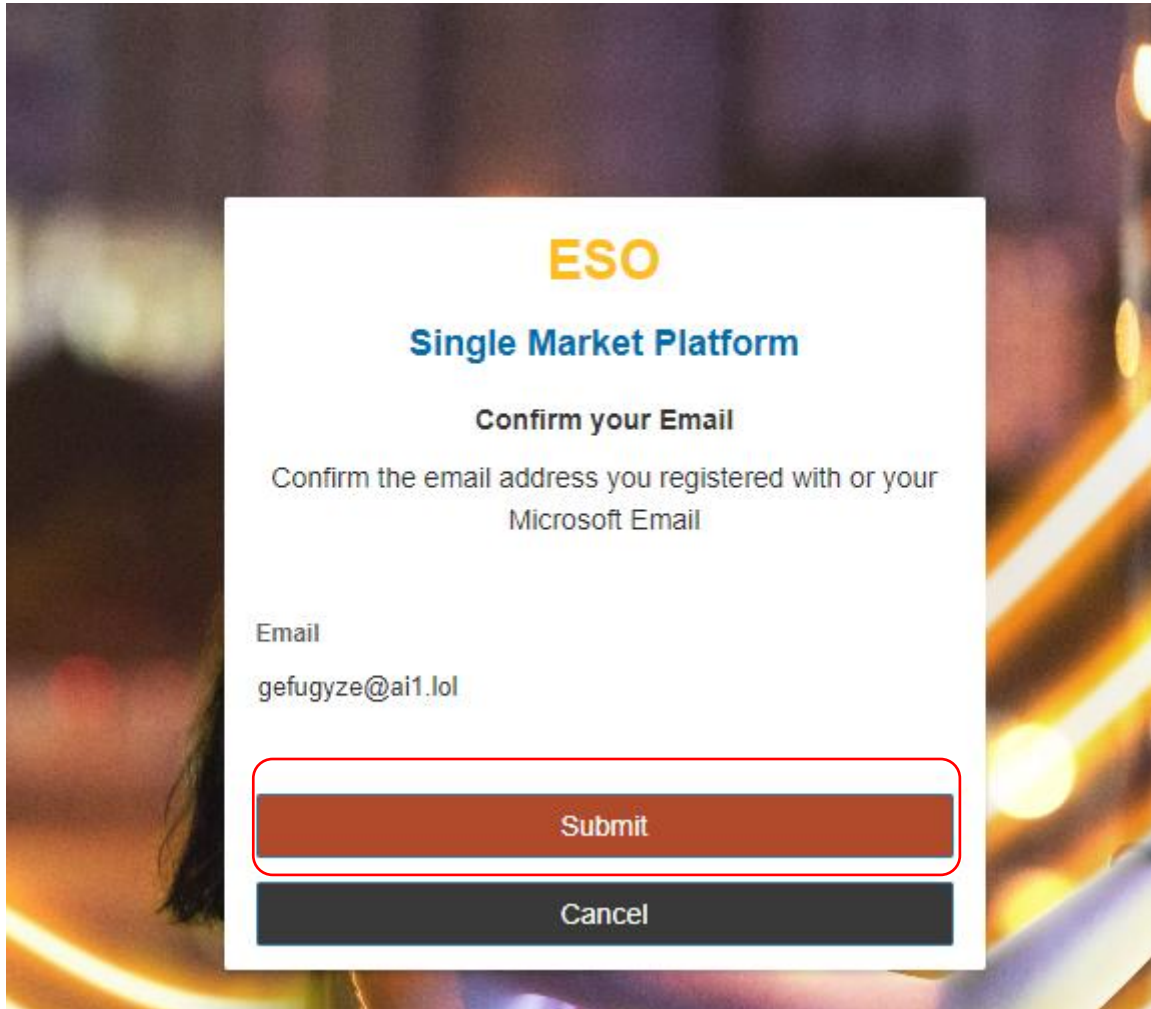
Figure 2.2.6.1



2.7. First-time/New Prospective User Registration

- To confirm the Email address registered, simply click the 'Submit' Custom Button
- Select 'Cancel'. If you wish to abort the process

Figure 2.2.7

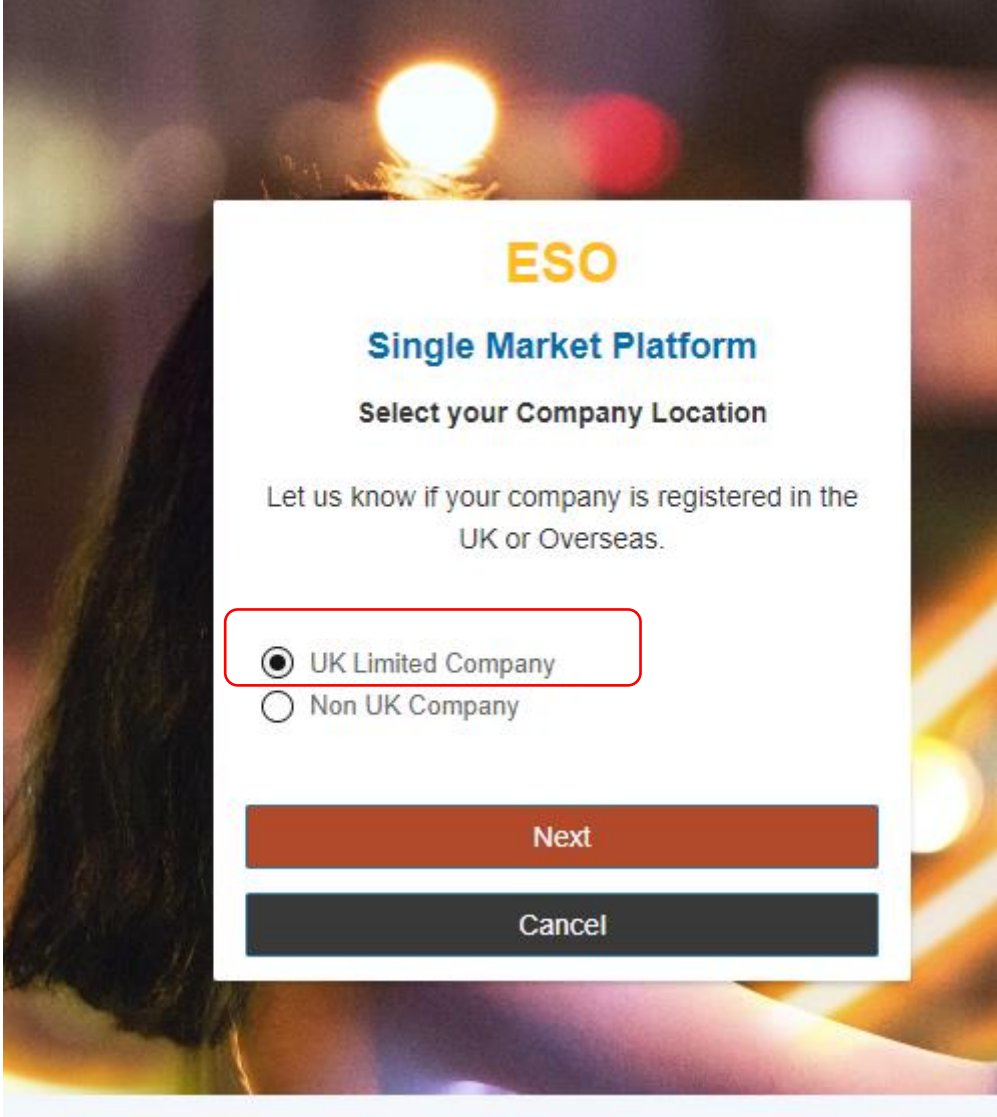


2.8. Company Registration – UK Limited Company

The section below will illustrate the steps required for First Time User's Company Registration if their Company/Organisation is based in the UK.

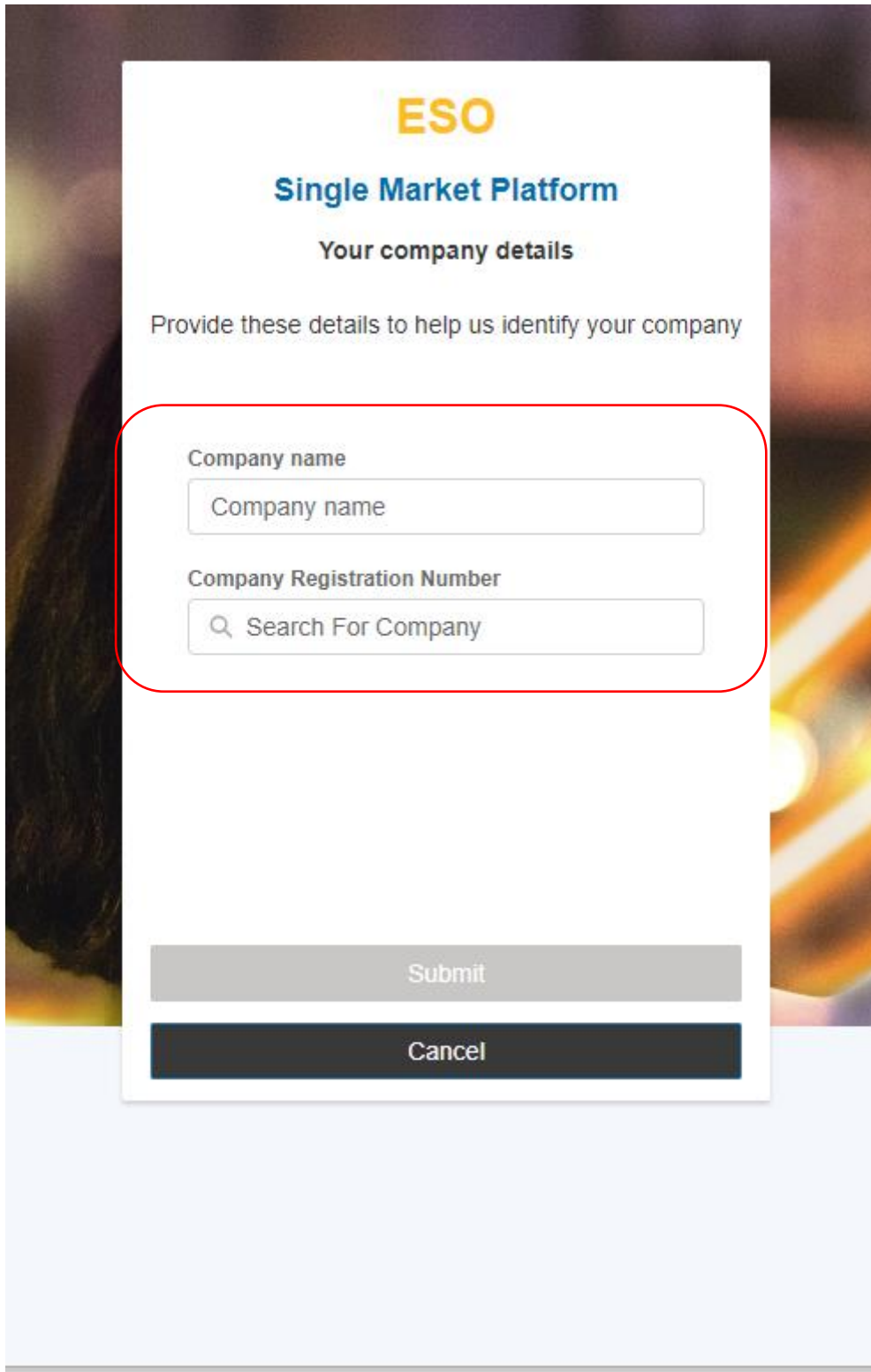
- Select your Company/Organisation as a UK Limited Company
- Enter your **exact** Company Name and Company Registration Number. Please note that the Company will be required to be registered with Companies House, as SMP will cross check the Companies House Database to locate your Company. Please also ensure that the precise Company Registration Number is entered to ensure the accurate and exact match is made.
- Select Next

Figure 2.2.8



The screenshot shows a registration form titled "ESO Single Market Platform" with the heading "Select your Company Location". Below this, it asks the user to indicate if their company is registered in the UK or Overseas. There are two radio button options: "UK Limited Company" (which is selected and highlighted with a red box) and "Non UK Company". At the bottom of the form, there are two buttons: "Next" (in a brown box) and "Cancel" (in a dark grey box).

2.9. Company Registration – UK Limited Company *cont.*



The screenshot shows a registration form titled "ESO Single Market Platform" with the subtitle "Your company details". Below the title, it says "Provide these details to help us identify your company". The form contains two input fields: "Company name" and "Company Registration Number". The "Company name" field has a placeholder text "Company name". The "Company Registration Number" field has a search icon and a placeholder text "Search For Company". At the bottom of the form, there are two buttons: "Submit" and "Cancel". A red rounded rectangle highlights the two input fields.

ESO
Single Market Platform
Your company details

Provide these details to help us identify your company

Company name

Company Registration Number

Submit

Cancel

Figure 2.2.9

2.10. Company Registration – UK Limited Company *cont.*

In order to proceed to the next screen and the 'submit' button to be released – an exact match must be found when the Company Registration Number is entered in the search dialog box. The full address will be shown on screen to help you verify it is the correct Company. You have the option to start the search again by selecting 'Remove Company'.

Figure 2.2.10

ESO

Single Market Platform

Your company details

Provide these details to help us identify your company

Company name

ENERGY OPTIMISATION SOLUTIONS LIM

Company Registration Number

10285951

ENERGY OPTIMISATION SOLUTIONS LIMITED

128 City Road
London
EC1V 2NX

[Remove Company](#)

Submit

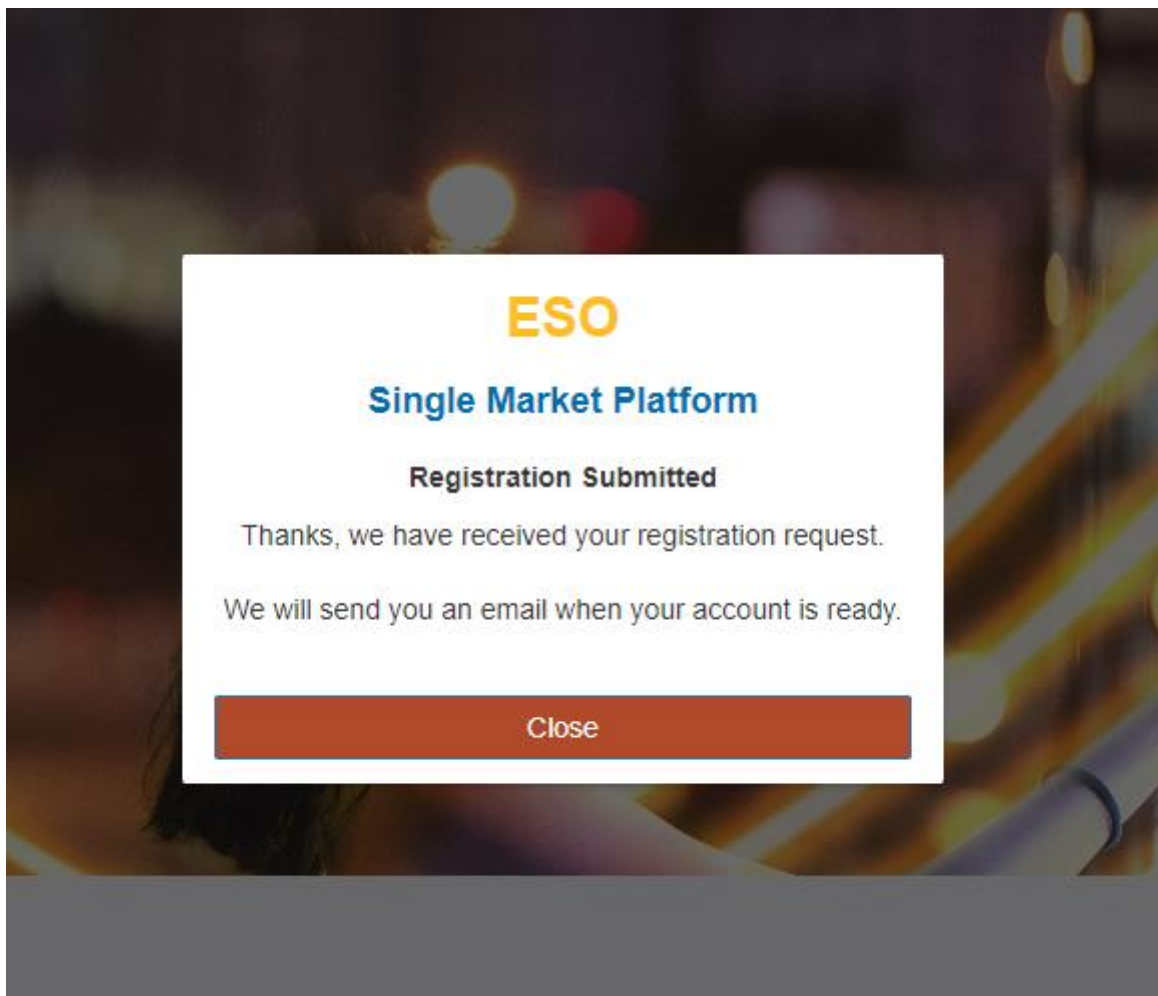
Cancel

2.11. Company Registration – UK Limited Company *cont.*

Confirmation that the registration process is complete will end with this screen notification.

- If you are a first time registrant, then your registration request will be reviewed by the Contracts & Account Management Team before granting you full authorisation. When authorisation is granted you will receive an acknowledgement email, equally if the authorisation is rejected, then you will receive an Email Notification accordingly.
- If you are **a secondary or additional registrant to an existing 'Account'** (Company) already known to SMP, then your designated Super User will receive notification of your registration request. They will require authorising your request and upon doing so, you will receive an acknowledgement email, equally if the authorisation is rejected, then you will receive an Email Notification accordingly.

Figure 2.2.11

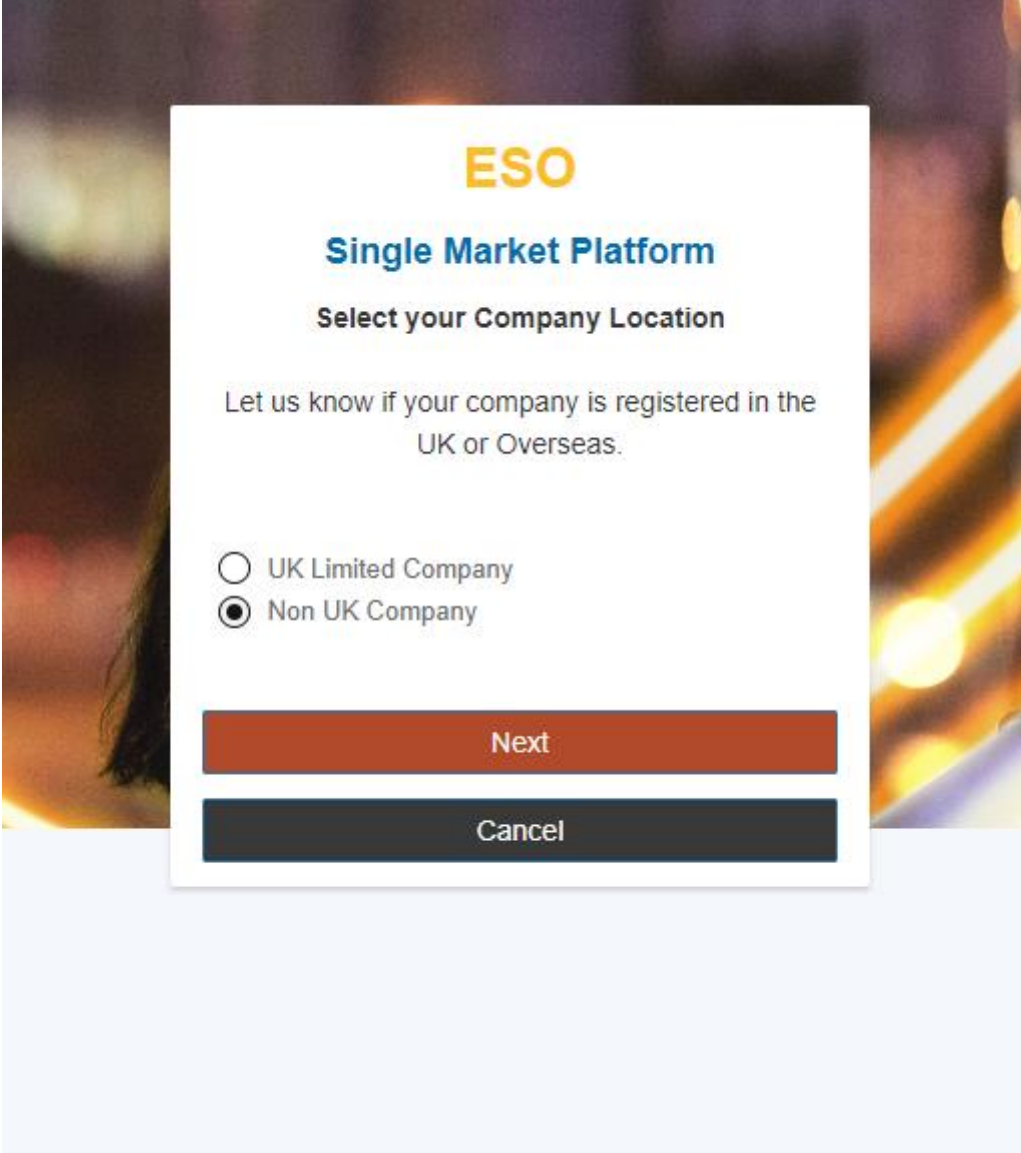


2.12. Company Registration – Non UK Company

The section below will illustrate the steps required for First Time User's Company Registration if their Company/Organisation is not based in the UK.

- Select your Company/Organisation as Non UK Company
- Select Next

Figure 2.2. 12



The screenshot shows a registration dialog box for the ESO Single Market Platform. The dialog is titled "ESO Single Market Platform" and asks the user to "Select your Company Location". It includes a question: "Let us know if your company is registered in the UK or Overseas." There are two radio button options: "UK Limited Company" (unselected) and "Non UK Company" (selected). At the bottom, there are two buttons: "Next" (orange) and "Cancel" (dark grey).

ESO
Single Market Platform
Select your Company Location

Let us know if your company is registered in the UK or Overseas.

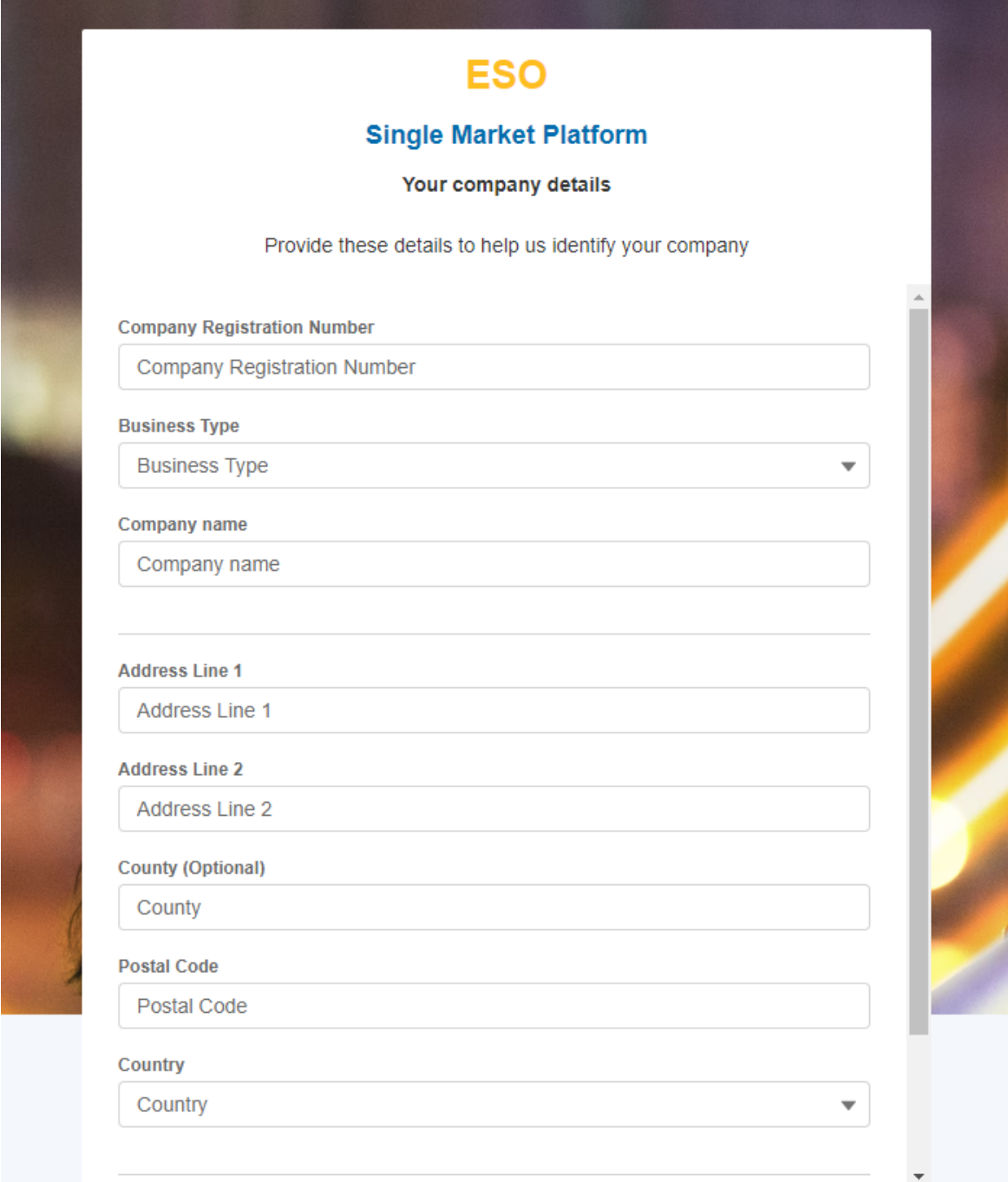
UK Limited Company
 Non UK Company

Next
Cancel

2.13. Company Registration – Non UK Company (cont.)

- You will be required to supply your Company/Organisation's a) Company Registration Number and b) Full Address
- In order for you to proceed and the 'Submit' Button to be released, you will be required to supply Address Line 1, Address Line 2, Post Code, Country and Country of Incorporation.

Figure 2.2.13



The screenshot shows a web form titled "ESO Single Market Platform" with the subtitle "Your company details". Below the title, it says "Provide these details to help us identify your company". The form contains several input fields and dropdown menus:

- Company Registration Number**: A text input field with the placeholder "Company Registration Number".
- Business Type**: A dropdown menu with the placeholder "Business Type".
- Company name**: A text input field with the placeholder "Company name".
- Address Line 1**: A text input field with the placeholder "Address Line 1".
- Address Line 2**: A text input field with the placeholder "Address Line 2".
- County (Optional)**: A text input field with the placeholder "County".
- Postal Code**: A text input field with the placeholder "Postal Code".
- Country**: A dropdown menu with the placeholder "Country".

A vertical scrollbar is visible on the right side of the form, indicating that there is more content below the visible area.

2.14. Company Registration – Non UK Company (cont.)

ESO
Single Market Platform
Your company details

Provide these details to help us identify your company

Company name
Disney

Address Line 1
1 Sunflower Lane

Address Line 2
Roehampton

County (Optional)
County

Postal Code
RH9 4RD

Country
United Kingdom

Country of incorporation
United Kingdom

Submit

Cancel

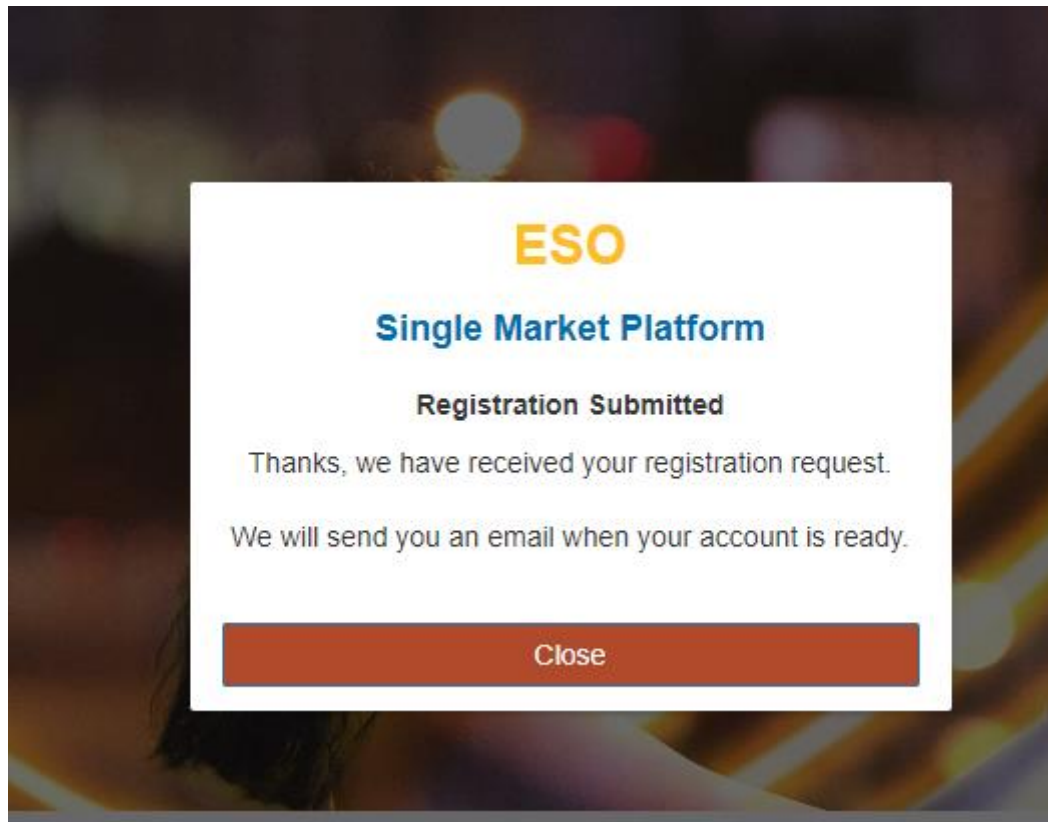
Figure 2.2.14

2.15. Company Registration – Non UK Company (cont.)

Confirmation that the registration process is complete will end with this screen notification.

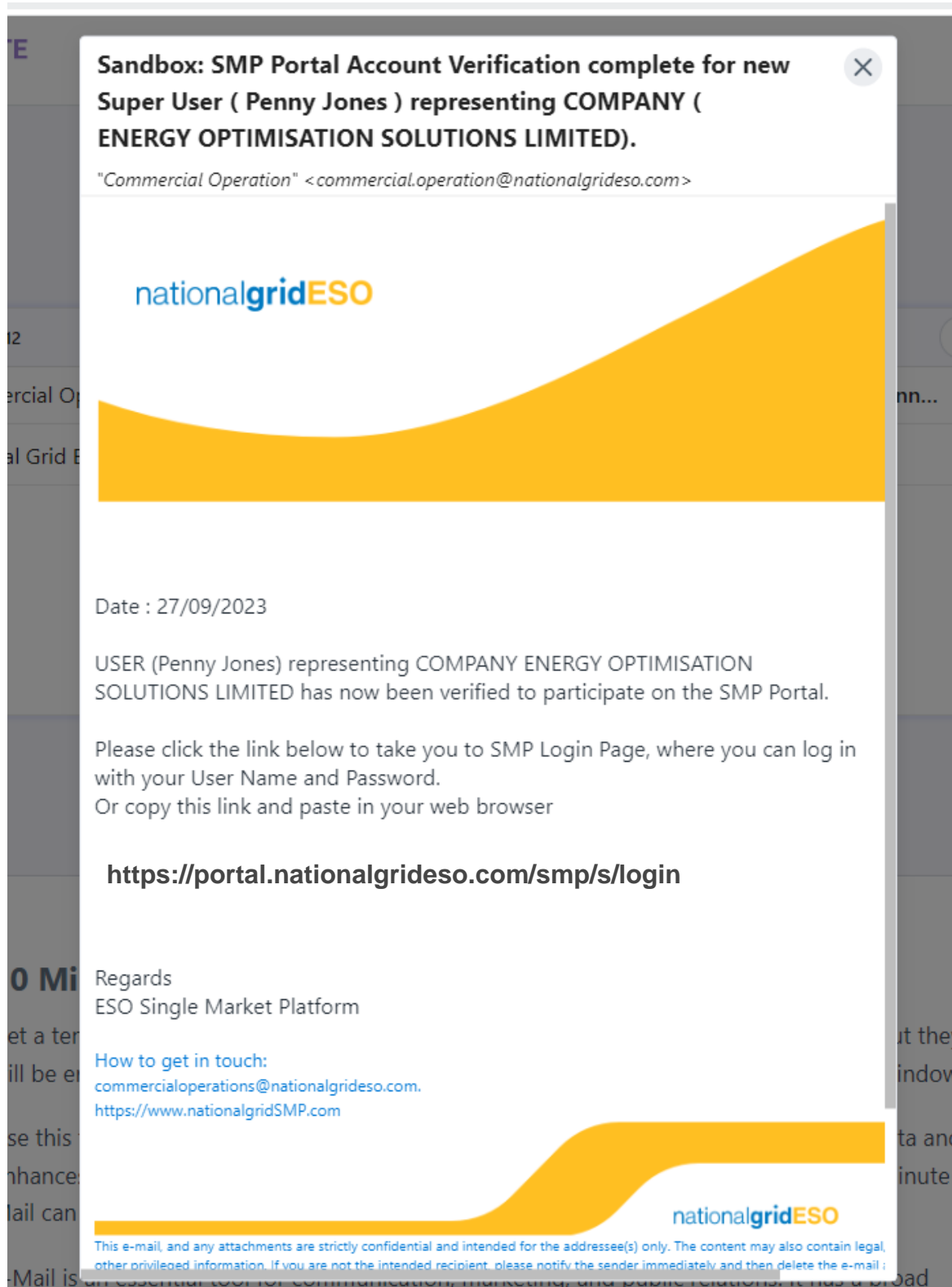
- If you are a first time registrant, then your registration request will be reviewed by the Contracts & Account Management Team before granting you full authorisation. When authorisation is granted you will receive an acknowledgement email, equally if the authorisation is rejected, then you will receive an Email Notification accordingly.
- If you are **a secondary or additional registrant to an existing 'Account'** (Company) already known to SMP, then your designated Super User will receive notification of your registration request. They will require authorising your request and upon doing so, you will receive an acknowledgement email, equally if the authorisation is rejected, then you will receive an Email Notification accordingly.
- If you are the first time User for your Company/Organisation, then you will automatically allocate the Super User Role. This will be made apparent in the Email Acknowledgement Template. In the event that you do not wish to be allocated the Super User Role or there is a subsequent User whom registers for the same Account and should be re-allocated the Super User Role, then this will have to be managed through the Accounts and Contract Management Team.

Figure 2.2.15



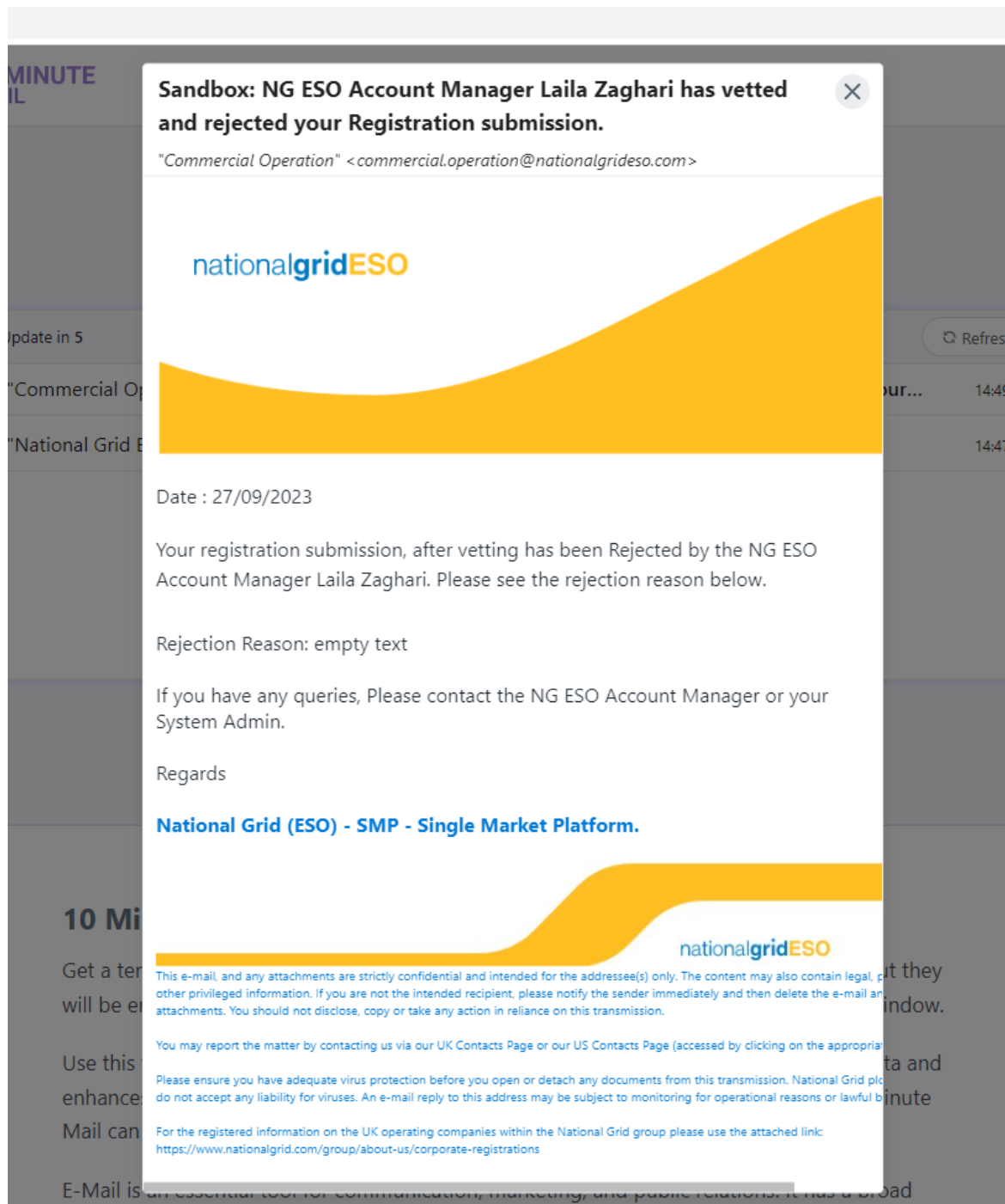
2.16. Completion of Registration – First Time User

Figure 2.2.16: Email Acknowledgement: Approval of Registration Request Template



2.17. Completion of Registration – First Time User

Figure 2.2.17 Email Acknowledgement: Rejection of Registration Request Template



2.18 'Registered' User's – Ongoing Access

- For both existing User's (*migrated users*) whom have had SSO credentials set up for them (*previous active SMP Users*) and new registered User's whom have acquired their credentials through the SSO registration process, the ongoing login process will be the same.
- Users navigate to the ESO Website, are presented with the screen below and will instead enter their Email address (which will act as their Username) and be prompted for a password.
- As a one off task for existing 'migrated users' only, they will enter their existing SMP Portal User password, and then will be prompted to re-set the password.
- Where a password has been reset, or in the instance of new User's if thereafter their new password has been forgotten, they have the option to click '*Forgot password*' and are provided with another opportunity to create a new password entirely. If the user experiences any difficulties throughout they can send an email to the helpdesk highlighted below. The steps for resetting passwords as standard is illustrated in the sections overleaf.

2.18. Registered' User's – Ongoing Access Steps

- The first step to resume access is to simply enter your Username (Email Address) or (SMP Username) and then enter your Password.
- If any difficulties are experienced please send an email to the address highlighted in the green box.

Figure 2.2.18

ESO

Sign in to your ESO account

Continue with Microsoft

or

Email

Email

Password

Password

Sign in

Cancel

Forgot password?

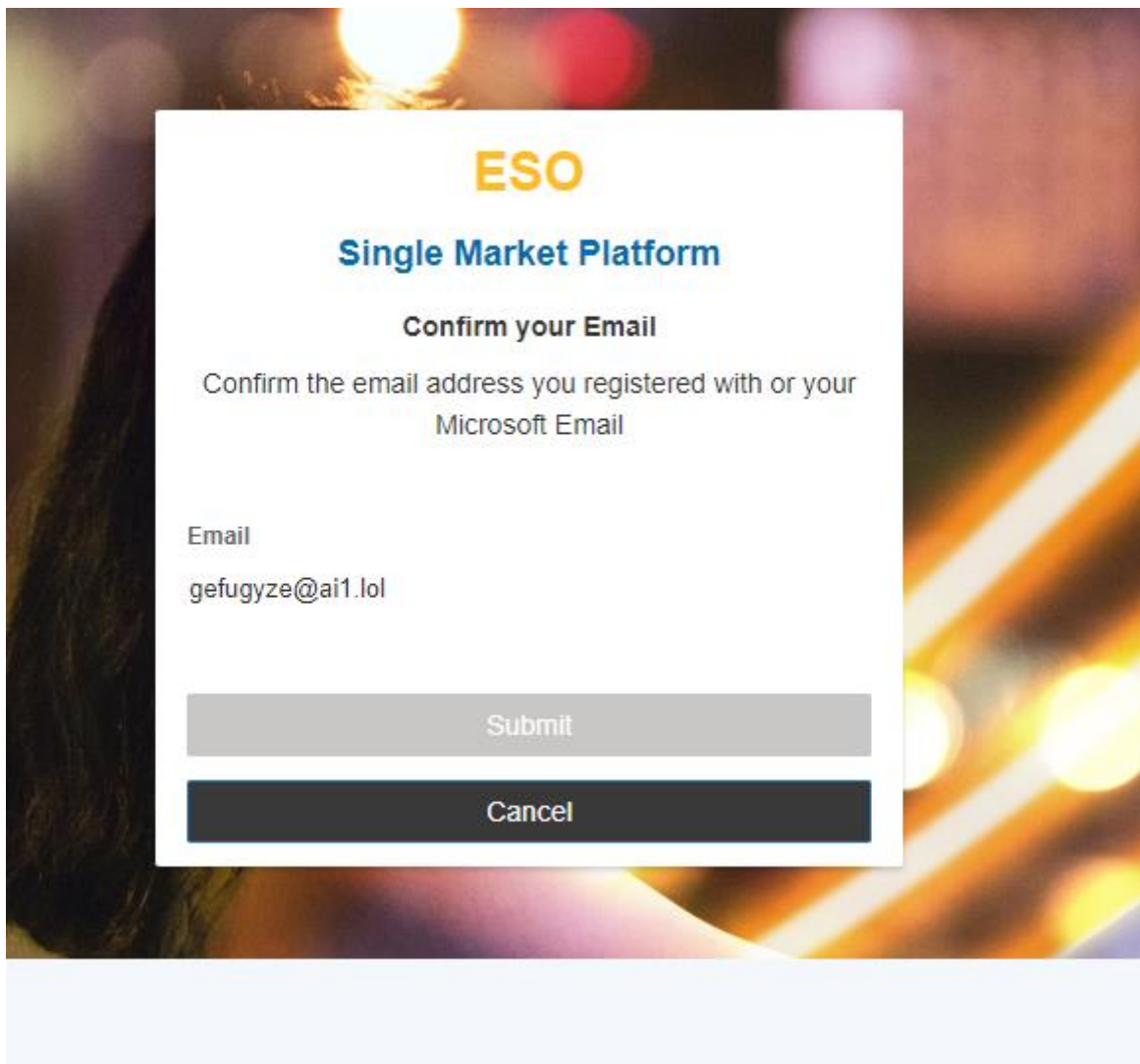
No account? **Register now**

Need Help? Email box.digitalhelp@nationalgrideso.com

2.19. Registered' User's – Ongoing Access Steps

- Following on from the Username and Password being entered, you will be prompted to verify your email address by clicking 'Submit'.
- *Please ignore the reference to '*Microsoft Email*' if you Email Provider/Application is different
- You can abort the process by selecting Cancel – which will in turn navigate you back to the 'home page' for the ESO Website

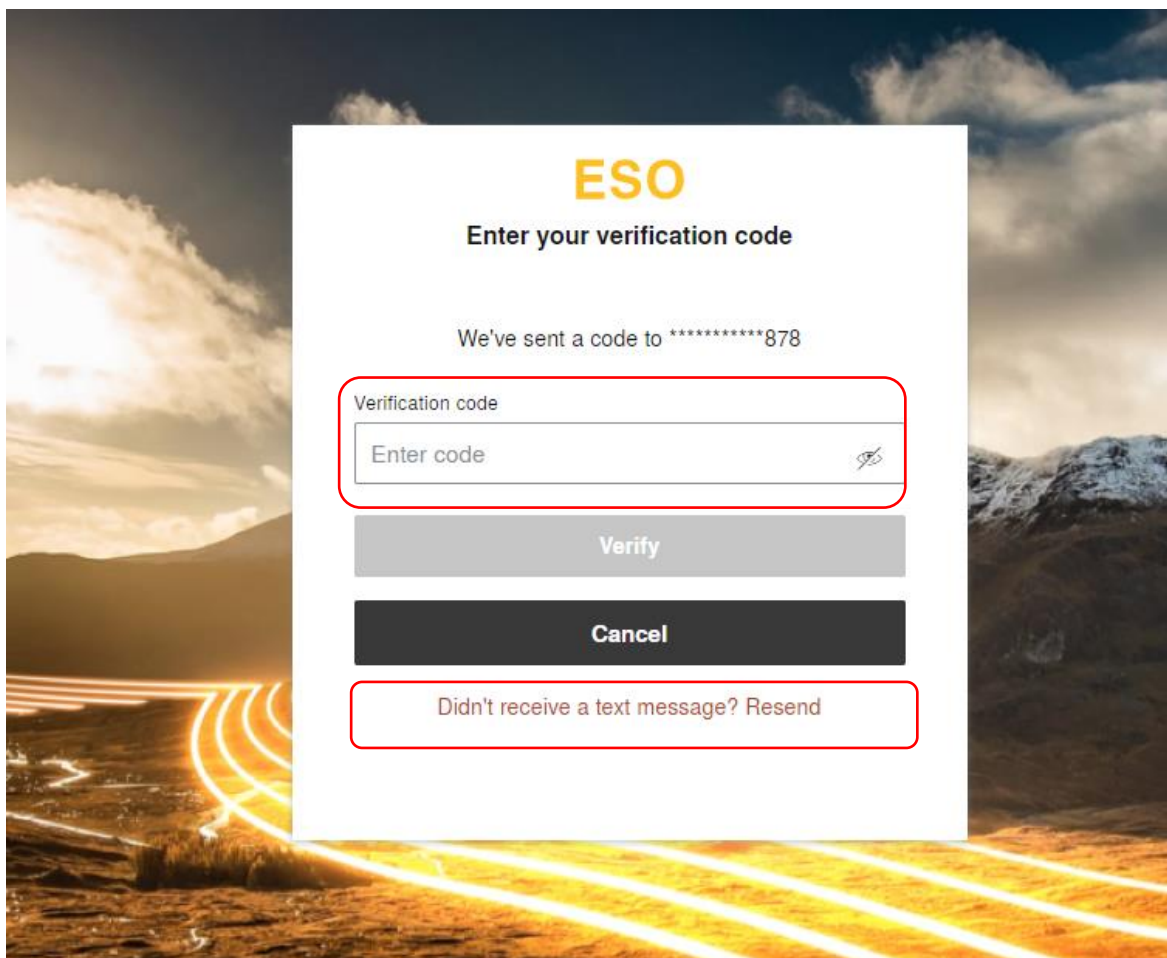
Figure 2.2.19



2.20. Registered' User's – Ongoing Access Steps

- A verification code will be sent to the designated Mobile Phone number provided at the point of registration.
- You will be expected to enter the code and select 'Verify'.
- If a Text/SMS Message has not been received with the code within a couple of minutes, please proceed with clicking the 'Didn't receive a text message' Resend link to generate a new code with a secondary attempt.
- If after secondary attempt no code is generated, then please send an email to the box.digitalsupport@nationalgrid.com helpdesk email.
- If these steps have been followed successfully, you will be instantly granted access to the SMP Portal.

Figure 2.2.20



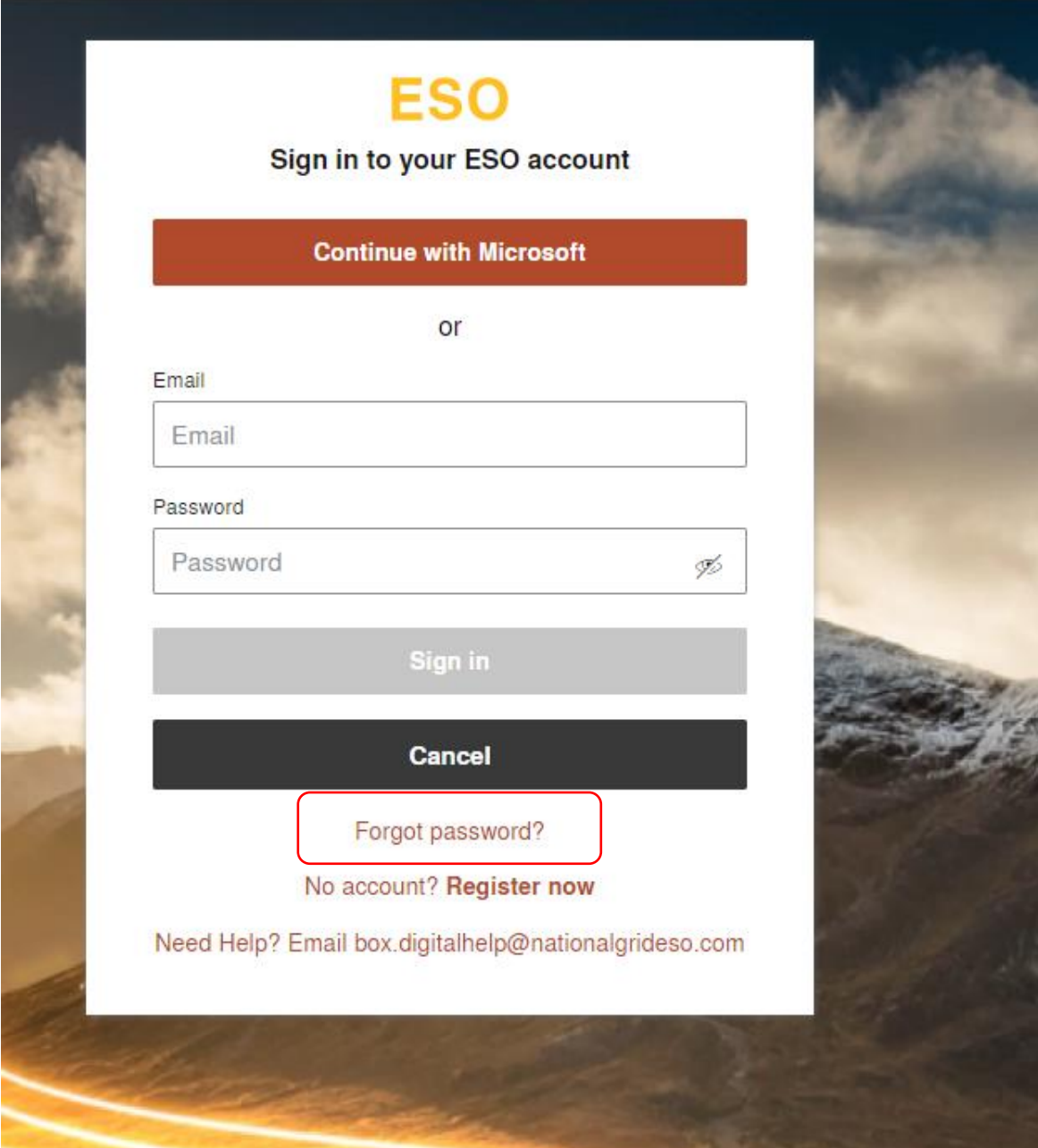
2.21. Registered' User's – Ongoing Access Steps

- A verification code will be sent to the selected Email Address and you will be expected to enter the code and select 'Verify'.
- If an Email with the code is not successfully received within a couple of minutes, please ensure it hasn't landed in your spam or junk boxes and then proceed with clicking the 'Didn't receive a text message' Resend link to generate a new code with a secondary attempt.
- If after secondary attempt no code is generated, then please send an email to the *box.digitalsupport@nationalgrid.com* helpdesk email.

2.22. Resetting Passwords

- In the instance a password has been forgotten, it can be reset by selecting the 'Forgot Password' hyperlink.

Figure 2.2.22

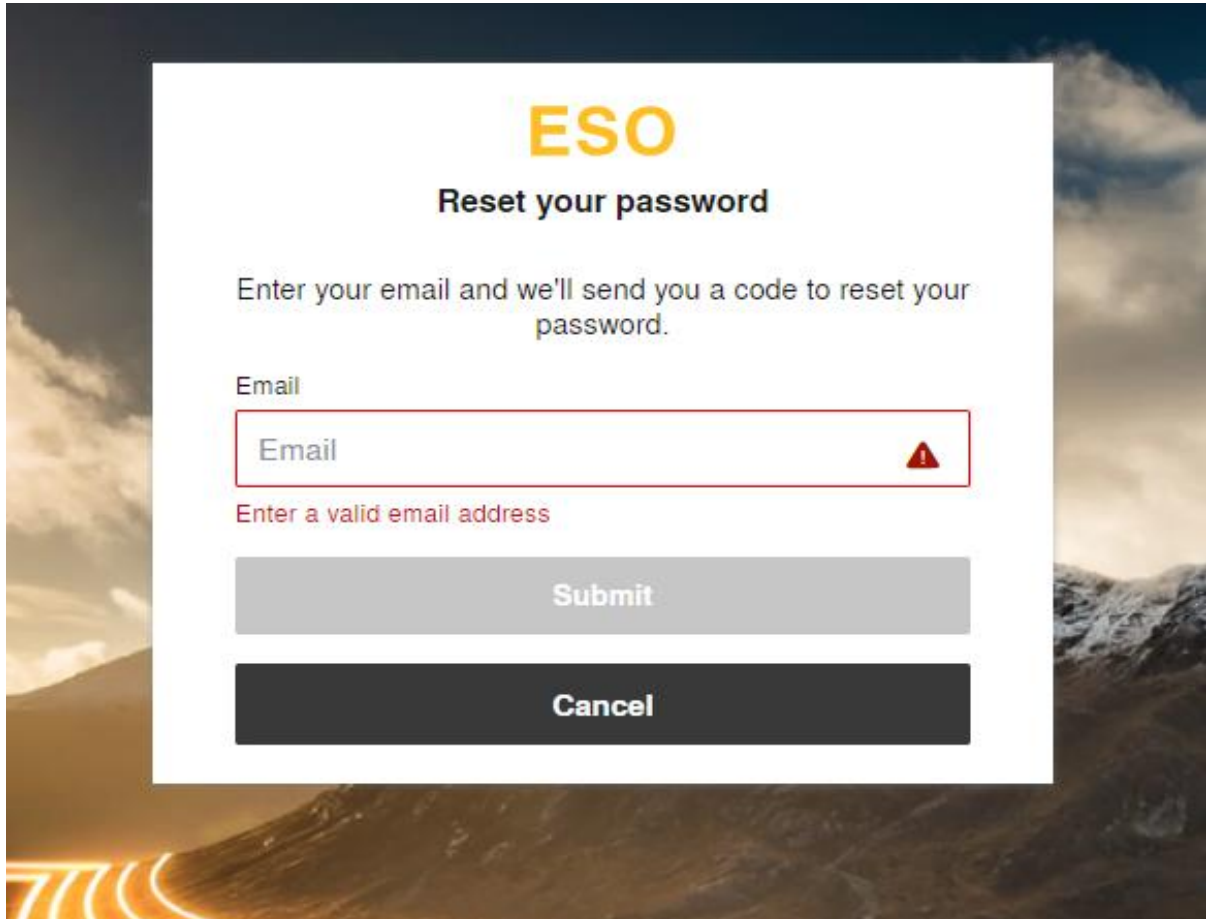


The image shows a sign-in page for the ESO account. At the top, the ESO logo is displayed in yellow. Below it, the text "Sign in to your ESO account" is centered. A prominent red button labeled "Continue with Microsoft" is positioned above the word "or". Below "or", there are two input fields: "Email" and "Password". The "Password" field includes a small icon for password visibility. Below the input fields are two buttons: a grey "Sign in" button and a dark grey "Cancel" button. A red rectangular box highlights the "Forgot password?" link, which is located below the "Cancel" button. Below this link, the text "No account? Register now" is displayed. At the bottom of the page, there is a line of text: "Need Help? Email box.digitalhelp@nationalgrideso.com". The background of the page features a scenic landscape with mountains and a bright horizon.

2.23. Resetting Passwords - Cont.

- You will be prompted to enter your **Email Address** (also your SSO Username for Primary Accounts)
- Please ensure you enter the Email in the correct format before proceeding with clicking on the 'Submit' button.

Figure 2.2.23

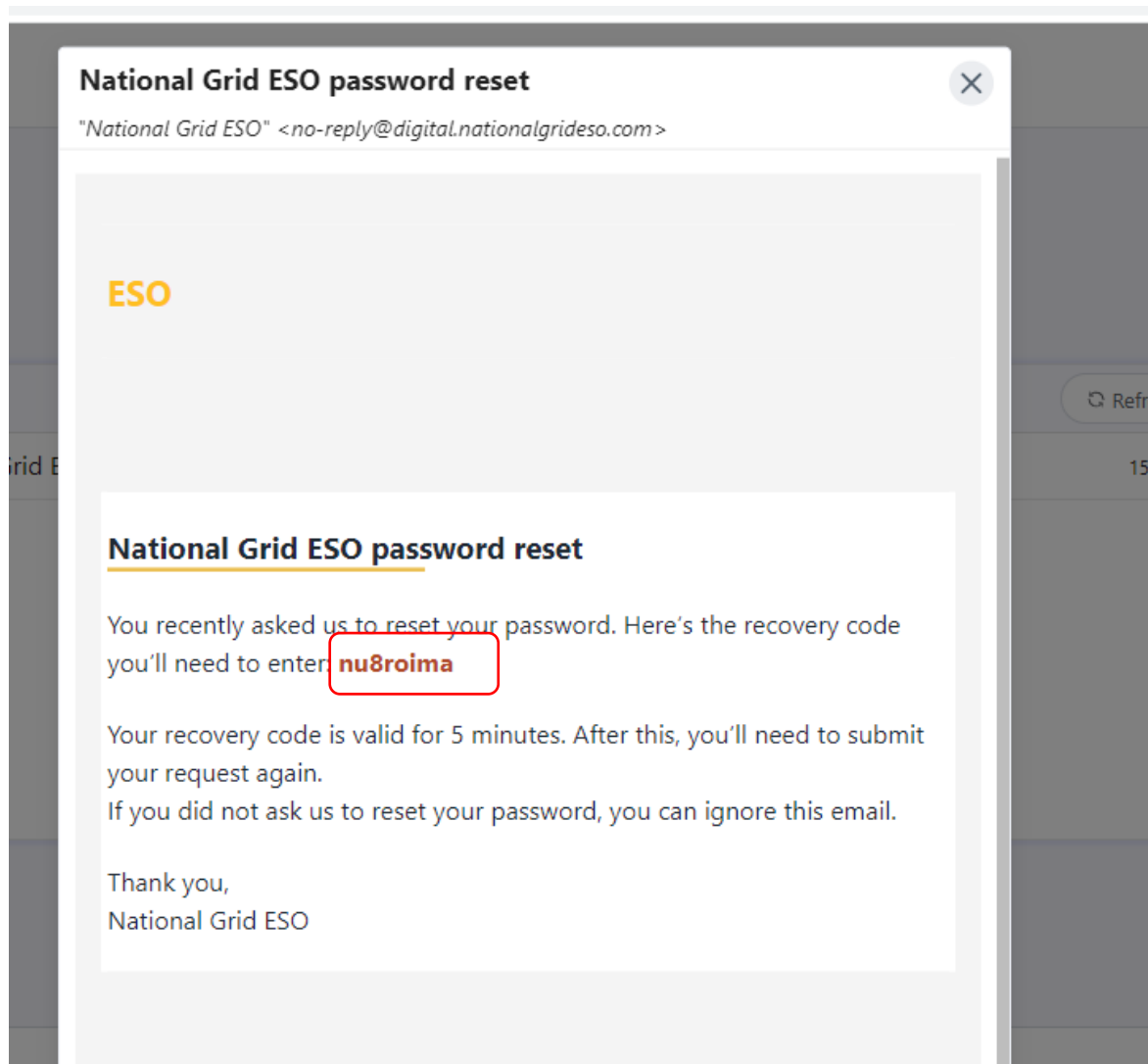


The screenshot shows a white modal window titled "ESO Reset your password". The text inside reads: "Enter your email and we'll send you a code to reset your password." Below this is a label "Email" and a text input field containing the word "Email". A red border surrounds the input field, and a red warning triangle icon is in the top right corner. Below the input field, the error message "Enter a valid email address" is displayed in red. At the bottom of the modal are two buttons: a grey "Submit" button and a dark grey "Cancel" button.

2.24. Resetting Passwords - Cont.

- You will be prompted to enter your **Email Address** (also your SSO Username for Primary Accounts)
- Please ensure you enter the Email in the correct format before proceeding with clicking on the 'Submit' button.
- An Autogenerated Email will be sent to your Mailbox as illustrated below. Please copy and paste the code from the body of the Email Template and enter into the field entitled 'Recovery Code'.

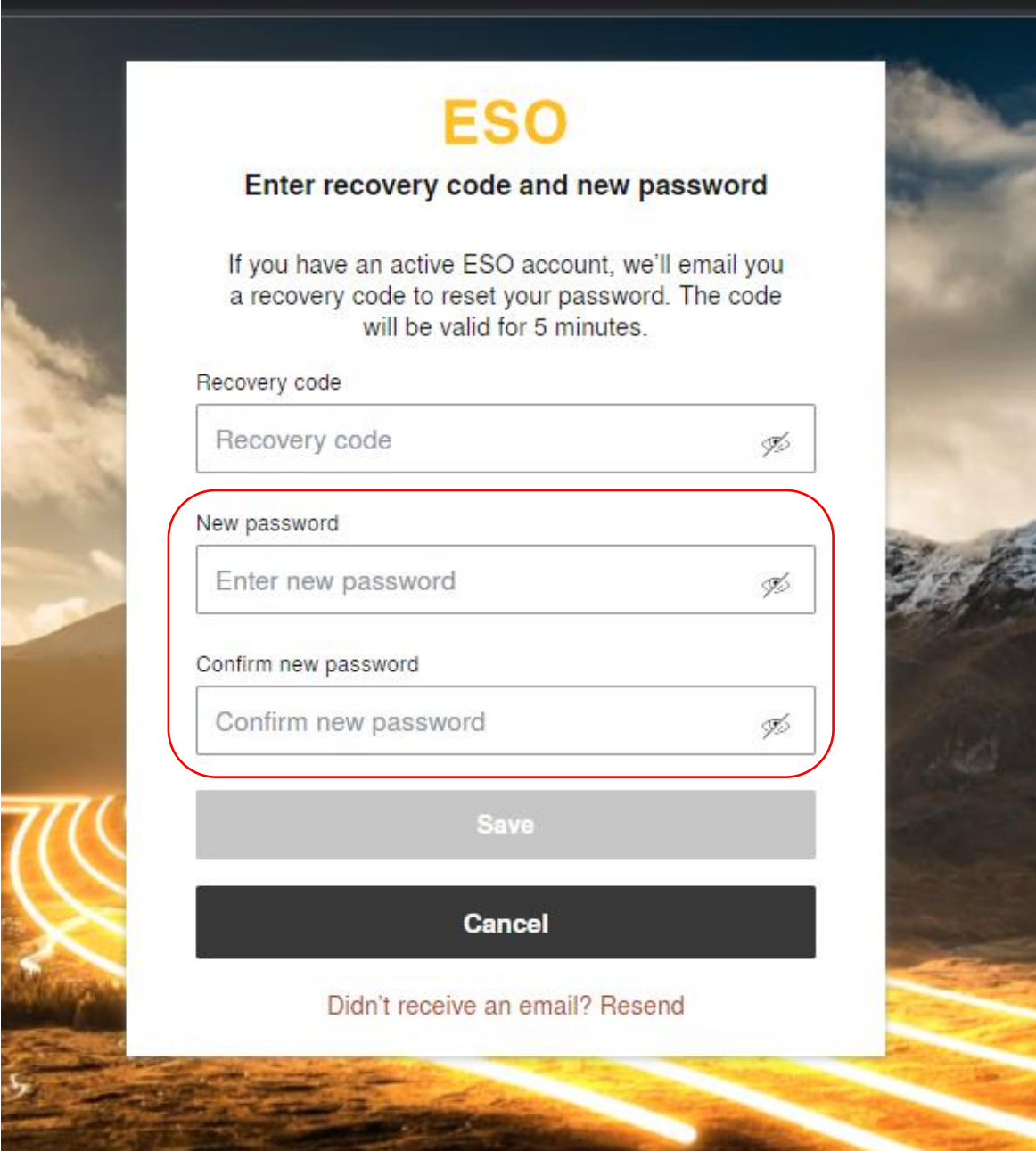
Figure 2.2.24



2.25. Resetting Passwords - Cont.

- Once you enter the Recovery Code, you will also be prompted to enter the New Password and Confirm the New Password by re-entering it in the 'Confirm new Password' field.
- Once this is complete, the 'Save' button should be released for selection.

Figure 2.2.25



ESO

Enter recovery code and new password

If you have an active ESO account, we'll email you a recovery code to reset your password. The code will be valid for 5 minutes.

Recovery code

New password

Confirm new password

Save

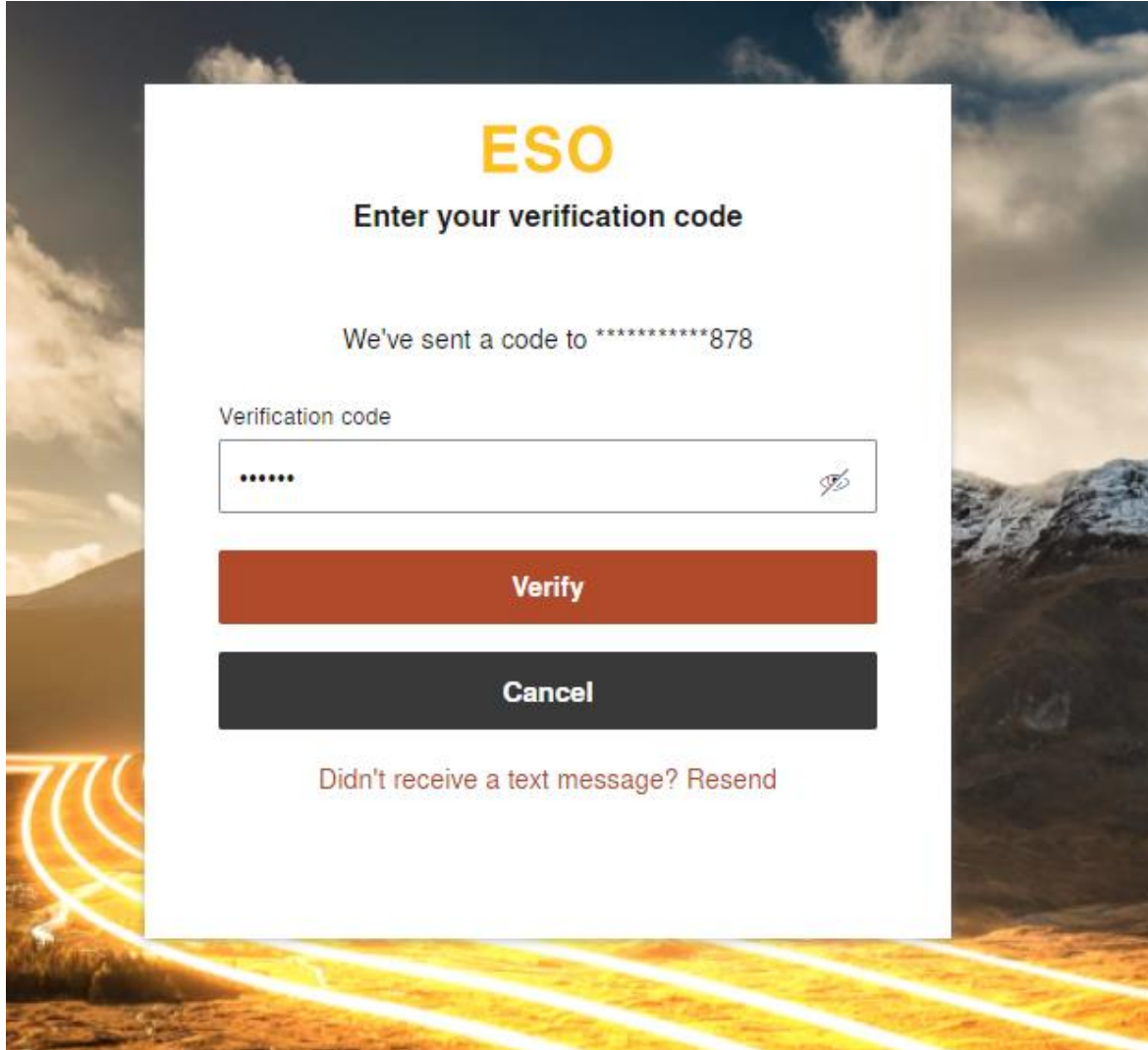
Cancel

Didn't receive an email? Resend

2.26. Resetting Passwords - *Cont.*

- The final step to complete the resetting of password process is to undergo verification which will be identical to the verification by mobile phone text/SMS applied when attempting to login.

Figure 2.2.26



2.27. User's with 'Multiple Accounts'

2.27.1. Legacy Users

For a select number of User's they will have been provided with access to several different Company Accounts and consequently have required a separate set of credentials to login into each Account on SMP. Moving forward these User's will continue to have access to said Accounts with their approval, however only one of the select accounts will be included in the data migration. This means that access to one account will be automatically set up, whilst the others if continued access is required will need their credentials created on a case by case basis by the NG ESO. The key differences in accessing Multiple Accounts for these User's is as follows;

- The Username for the 'main'/'primary' Account (*the migrated account*) will be the User's **Email Address**
- The Username for any additional 'secondary' Account(s) will be the **existing/inherited SMP Username**.
- The User can continue to use the same Email Address across multiple User Accounts
- The User can use the same Mobile Number to authenticate across multiple User Accounts
- Users must be associated with an individualised Email Address and cannot use generic email addresses *i.e.* queries@nationalgrid.com

2.27.2. Prospective Users

As of Release 2.8 for User's whom have registered successfully and acquired their SSO credentials, then wish to gain access to additional Accounts, they will have to raise a query or request from their Account or Contract Manager directly in the first instance.

Access to the EAC Platform

At the point of Release 2.8, the EAC Platform will not as yet be instantly accessible, however the live launch of EAC will follow shortly.

Moreover for any user wishing to gain access to the EAC Platform it is a prerequisite they have the following;

- A SSO login credential
- An 'Active' SMP Portal User with the 'Unit Manager' Role
- An 'Active' SMP Portal User with the 'Trader' Role

It is imperative that User's must have Trader Role in particular to be able to gain access to the EAC Platform from within SMP. To learn how to be assign a Trade Role, please visit the Chapter on 'User Management'.

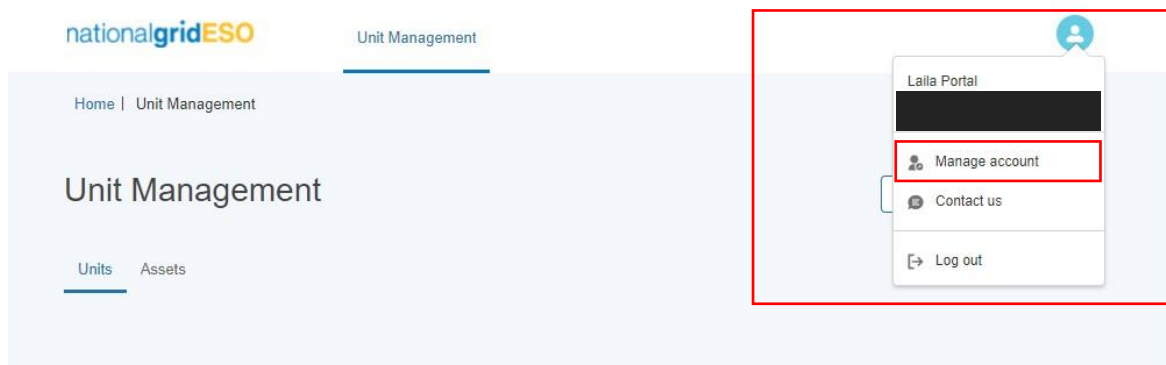
Once Users have logged in and directed to SMP, they can in turn be re-directed automatically to the EAC Platform without having to login in separately by simply clicking on the EAC Icon on the SMP Home Page. For more information on navigating to the EAC Platform, please visit the Chapter on 'User Management'.

Updating User & Company Details

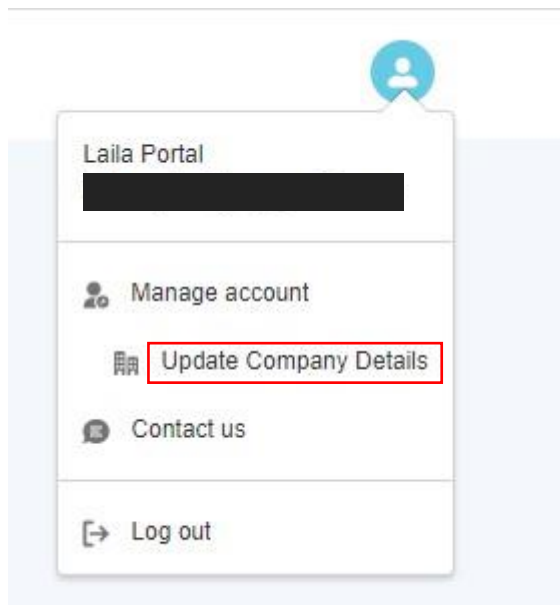
2.28. Making updates to your own Contact & Company Details

- In the event that a User/Contact's own details or those of his Company have changed or need updating or amending, a user is only able to make limited amendments.
- The user must navigate to the right-hand section of the "Unit Management" Page. This is currently the default Landing/Home Page upon initially logging in.
- An 'avatar' icon will appear and the user must click on this. They will then be presented with a drop-down pop-up screen with options to either 'Manage account' or 'Contact us'.
- The user should click on 'Manage account'.

Figure 13.0: Managing Contact & Account Details Screen



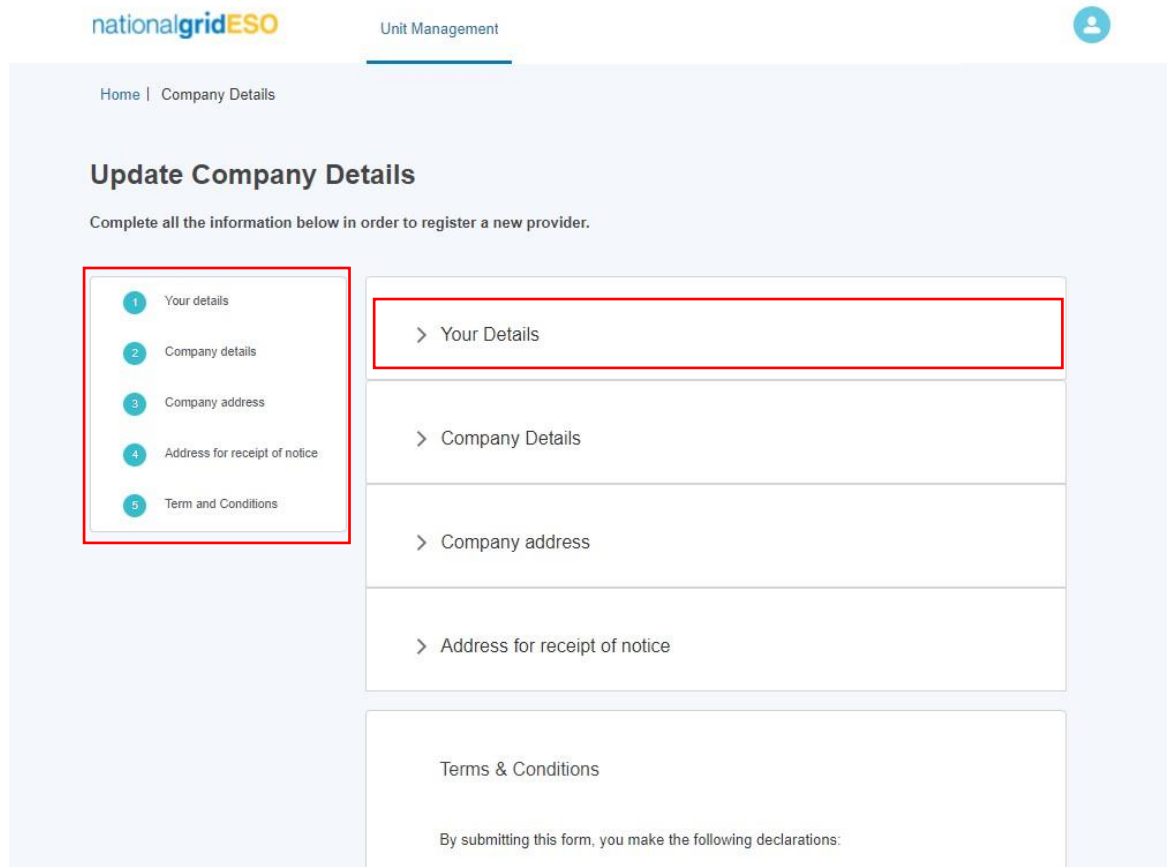
- The User will then select be prompted with an option to 'Update Company Details' as illustrated in the figure below.



2.29. Update Company Details: Home Page

- The user is then navigated to the Update Company Details Page as illustrated in Figure 14.0
- The user can click on either the 'accordion' feature on the left-hand side to navigate to a particular subsection directly OR they can click on the subsection heading e.g. 'Your Details'. This 'opens' up the section for granular level of information/fields to update or edit.

Figure 14.0: Update Company Details Home Page Screen



2.30. Update Company Details: Completing Your Detail Section

- The user **is no longer able to edit** the First Name, Last Name, Mobile Phone fields and Email Address directly.
- The reason for this is that they are tied to their respective SSO credentials and therefore any modification will require a change to their SSO User Record. If any of these fields require modification, then a query will need to be raised by emailing the helpdesk: box.digitalsupport@nationalgrid.com

Figure 15.0: Update 'Your Detail' Section

Update Company Details

Complete all the information below in order to register a new provider.

- 1 Your details
- 2 Company details**
- 3 Company address
- 4 Address for receipt of notice
- 5 Term and Conditions

▼ Your Details

First Name
First Name

Last Name
Last Name

Company email
[Redacted]

2.31. Update Company Details: Completing Your Company Details Section

- The user is also **not able to update** the *Company Name* or *Company Registration Number*. However, the *Company Phone Number* and *Company Address Fields* can be modified or updated. If the *Company Name* or *Company Registration Number* require updating, a query should be **raised with your Account/Contract Manager directly**.
- Please note that the *Company Phone Number* is marked with a red asterisk, which indicates that it requires a specific format and if a number is entered incorrectly, an error message will appear to this effect.

Figure 16.0: Update 'Your Company Details' Section

Update Company Details

Complete all the information below in order to register a new provider.

- 1 Your details
- 2 Company details**
- 3 Company address
- 4 Address for receipt of notice
- 5 Term and Conditions

> Your Details

Company Details

Company name
Emirates stadium

Company Registration Number (UK Company House Number)
Company Registration / H

* Company Phone number
▼

2.32. Update Company Details: Completing Your Company Address Section

- The user is able to update all fields with the exception of the *Country of Incorporation* field. If the User requires a change to this field, they should approach the NGESO Account Managers directly via email or phone.

Figure 17.0: Update 'Your Company Address Details' Section

The screenshot displays a web form titled "Update Company Details" with the instruction "Complete all the information below in order to register a new provider." On the left, a vertical sidebar contains five numbered steps: 1. Your details, 2. Company details, 3. Company address (highlighted with a red box), 4. Address for receipt of notice, and 5. Term and Conditions. The main content area shows a breadcrumb trail: > Your Details, > Company Details, and a dropdown menu for Company address (also highlighted with a red box). Below this, the form fields for the company address are listed: Street (text input), City (text input), County / State (optional) (text input), Postcode (text input), Country (dropdown menu), and Country of incorporation (dropdown menu).

2.33. Update Company Details: Completing Your Company Address for Receipt of Notice

- The user is able to update all fields with the exception of the *Country of Incorporation* field. If the User requires a change to this field, they should approach the NGESO Account Managers directly via email or phone.
- Please ensure the check box is ticked if the Address for receipt of notice is different from the Company address if this is the case.

Figure 18.0: Update 'Your Company Address for Receipt of Notice' Section

▼ Address for receipt of notice

Address for receipt of notice is different from the Company address

Street
Street

City
City

County / State (optional)
County / State

Postcode
Postcode

Country
Country ▼

Country of incorporation
Country of incorporation ▼

4.7 Terms & Conditions: Confirmation

- Upon varying, updating or modifying the User's contact or Company (Account) Details sections, they are expected to adhere to the Terms & Conditions and therefore complete this section before being granted the ability to save the record details or changes made.
- Please ensure the check box is ticked otherwise the user will be prevented from saving the changes successfully.

Figure 19.0: Confirm 'Terms & Conditions' Section

5 Term and Conditions

> Company address

∨ Address for receipt of notice

Address for receipt of notice is different from the Company address

Terms & Conditions

By submitting this form, you make the following declarations:

That it has complied with all laws intended to prohibit or restrict anti competitive practices relevant to its participation in activities associated with procurement by NGESO of Balancing Services;

That neither it nor any Affiliate has engaged in any market manipulation in relation to the wholesales energy markets; That neither it nor any Affiliate has done anything which would constitute a breach of the Bribery Act 2010 with a view to influencing the outcome of any procurement activity by NGESO in relation to Balancing Services; and

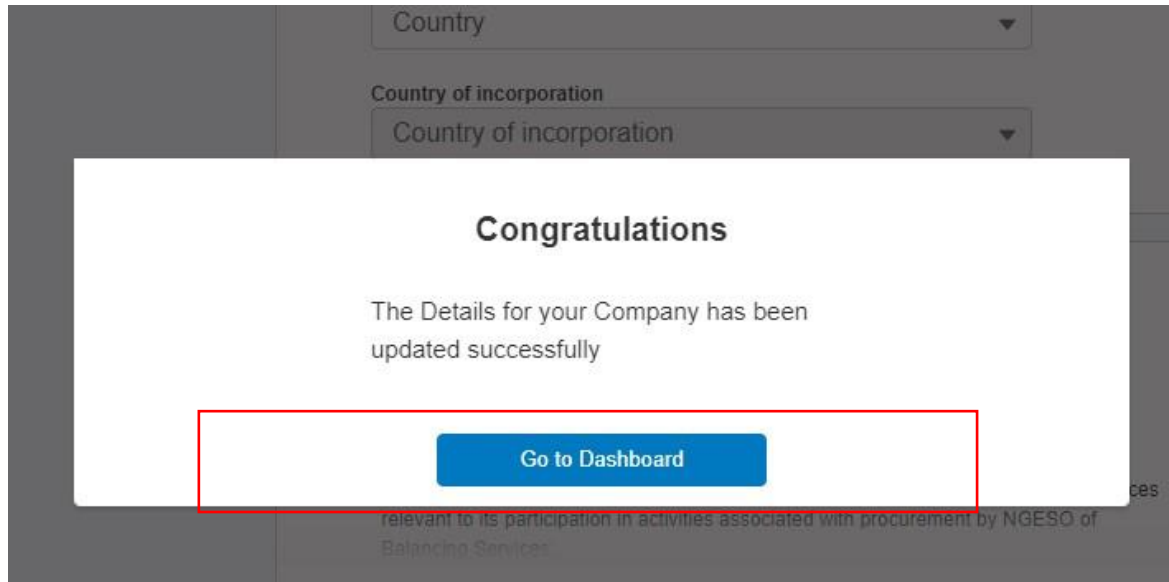
That neither it nor any Affiliate has offered to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any employee of NGESO.

I agree to the Terms and Conditions

4.8 Confirmation Notification Screen

- Once the Terms & Conditions section is completed, the User will be presented with a pop-up notification screen as acknowledgment that their changes have been saved. They then have the option to navigate to the Home Page (Unit Management) by selecting the 'Go to Dashboard' button.

Figure 20.0: Confirmation of Changes Notification Screen

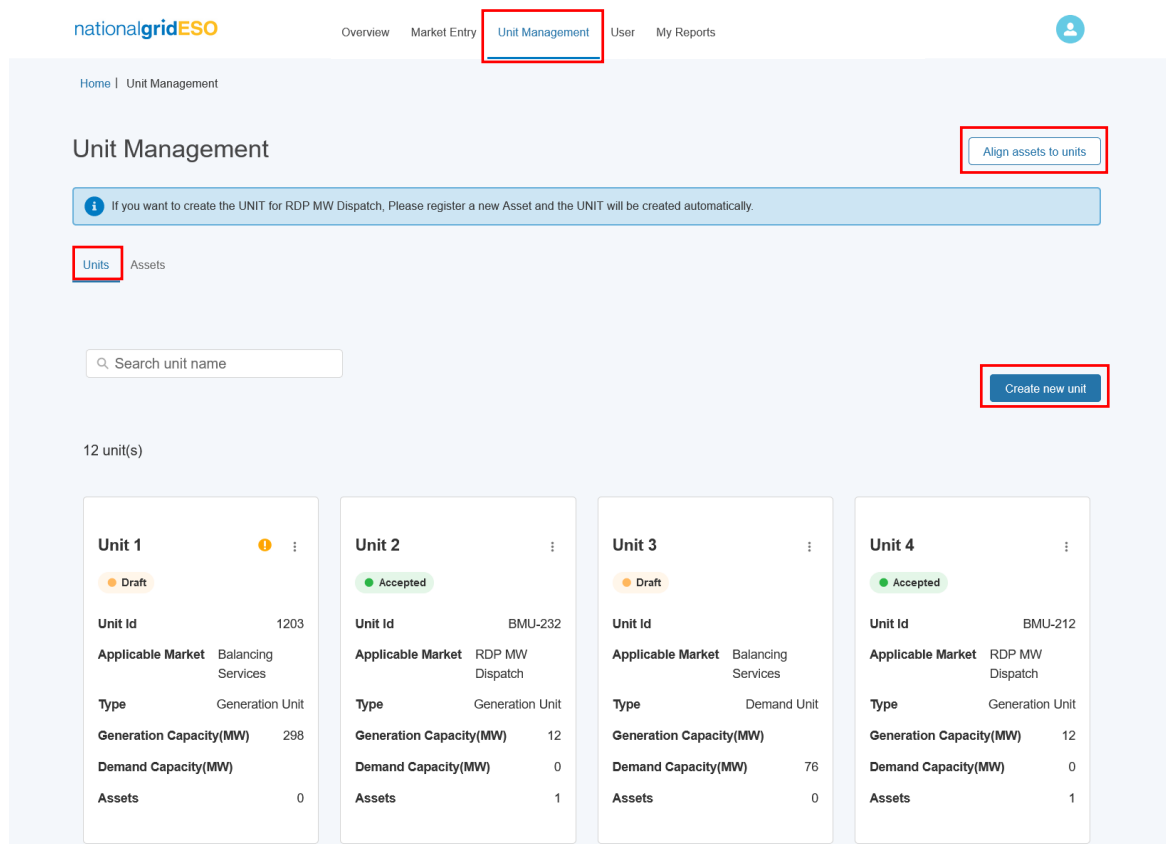


3. Asset & Unit Management Home Page

3.1. Navigating the Landing Page for Unit & Asset Management.

- The Unit Management Page is made up of several components as follows:
 - Unit Management Tab: Click on this to always land back on this page.
 - Units & Asset Sub Tabs: Click on these to switch between the collection of Units and collection of Assets.
 - Search bar: Enter text into the search bar to help you find a specific Unit/Asset. This will narrow down the tiles that are displayed, so that tiles are only displayed if the search text matches the start of the Unit/Asset name.
 - Create New Unit: Click on this to register a new unit*
 - Align assets to Units: Click on this to undertake the alignment of assets to Units*
- *Subsequent sections in this guide will cover each of these features in depth.

Figure 21.0: Asset & Unit Management Home Page Screen



4. Creating & Managing Assets

4.1. Create an asset.

- To register a new asset, the first step is to click on the 'Create new asset' where a user will be presented with the screen illustrated in Figure 22.0 'New Asset registration' where a unique asset name will be required. Please note that, firstly, an asset cannot be created without an asset name, and secondly, the name must be **unique in naming convention to the asset in question**. Once the asset name is provided, the user will be able to progress to the next step by clicking **Create**.

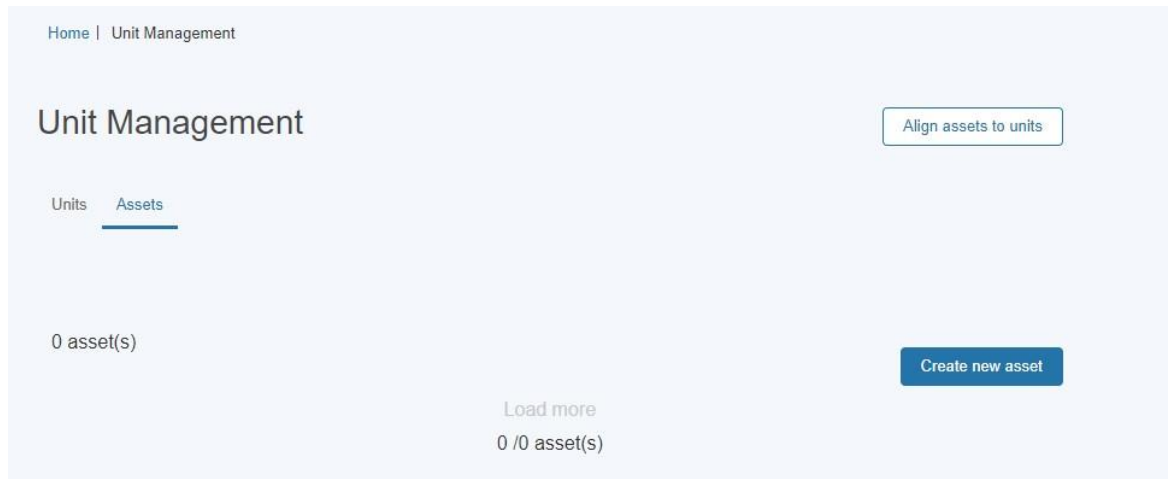
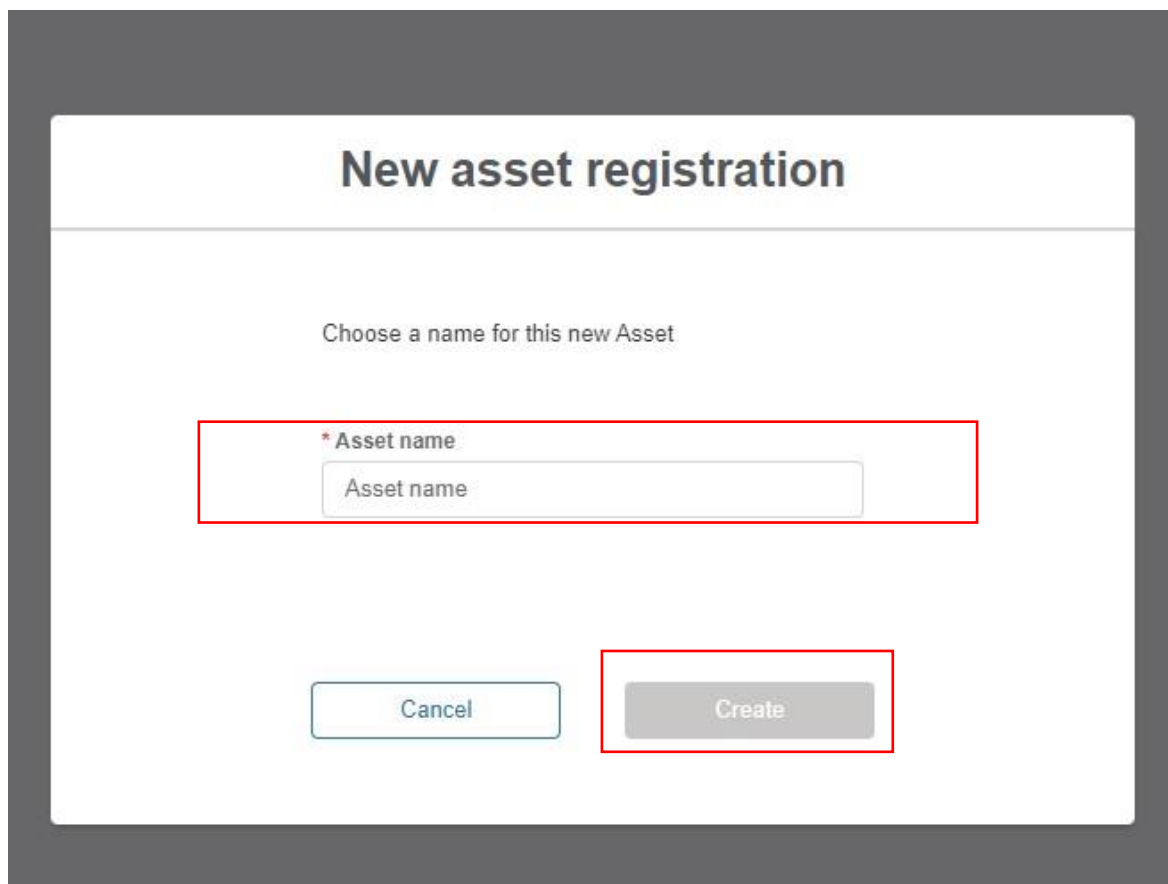


Figure 22.0: Creating Assets- Asset Registration



4.2. Asset Registration: Submitting Asset Information

- The user is navigated to the Asset Registration Page as outlined in Figure 23.0, the format is similar to the Account Management Page structure with an accordion section on the left-hand side for direct navigation to a specific section or the user can select the subsection they wish to complete.
- The figure illustrates the unique named asset for which the details are being registered; 'Roedean Windfarm'.
- Please note that the user is not able to progress the registration process for a created asset without completing all the sections and corresponding fields. The icon next to each subsection heading on the left-hand side will reflect the state the subsection is in.
 - A circular green icon with a tick indicates that the all the mandatory fields in the subsection have been completed.
A triangular amber icon with an exclamation mark indicates that some but not all of the mandatory fields in the subsection have been completed.
 - A circular blue icon with a number indicates that none of the mandatory fields have been completed yet.

Figure 23.0 shows the Asset Registration Detail Page where Subsection 1 has been completed, Subsection 2 is in progress while Subsections 3 & 4 are yet to be started.

Figure 23.0: Asset Registration Detail Page

The screenshot shows the 'New asset registration' page for 'Roedean WindFarm'. The page has a breadcrumb trail 'Home | Unit Management'. Below the title, the asset name 'Roedean WindFarm' is displayed in a red-bordered box. A message states: 'Complete all the information below in order to complete the registration of a new asset'. On the left, a vertical list of subsections is shown in a red-bordered box: 'Asset Details' (green checkmark), 'Connection Details' (amber warning triangle), 'Site Location' (blue circle with '3'), and 'MPAN' (blue circle with '4'). On the right, an accordion menu is open to 'Asset Details', with other subsections 'Connection Details', 'Site Location', and 'MPAN' collapsed. At the bottom, there are two buttons: 'Save and create new one' and 'Save asset'.

4.3. Asset Registration: Asset Details Section

- Figure 24.0 illustrates the Detail Section for the Asset.
- Please note that as the *Asset Ownership*, *Asset Type*, the *Effective from Date* and *Fuel Type* are all mandatory and therefore marked with a red asterisk. It is essential that these fields have information submitted.
- Please consult the Glossary Appendix for a translation of the Fields if the User is not clear about what is being requested.

Figure 24.0: Completing the 'Asset Details' Section

New asset registration

Roedean WindFarm

Complete all the information below in order to complete the registration of a new asset

1 Asset Details

2 Connection Details

3 Site Location

4 MPAN

Asset Details

* Asset Ownership

I am the asset owner

I am not the asset owner

Company Registration No. of Owner

* Asset Type

Generation Unit

Demand Unit

* Effective From Date

Effective From Date

Complete this field.

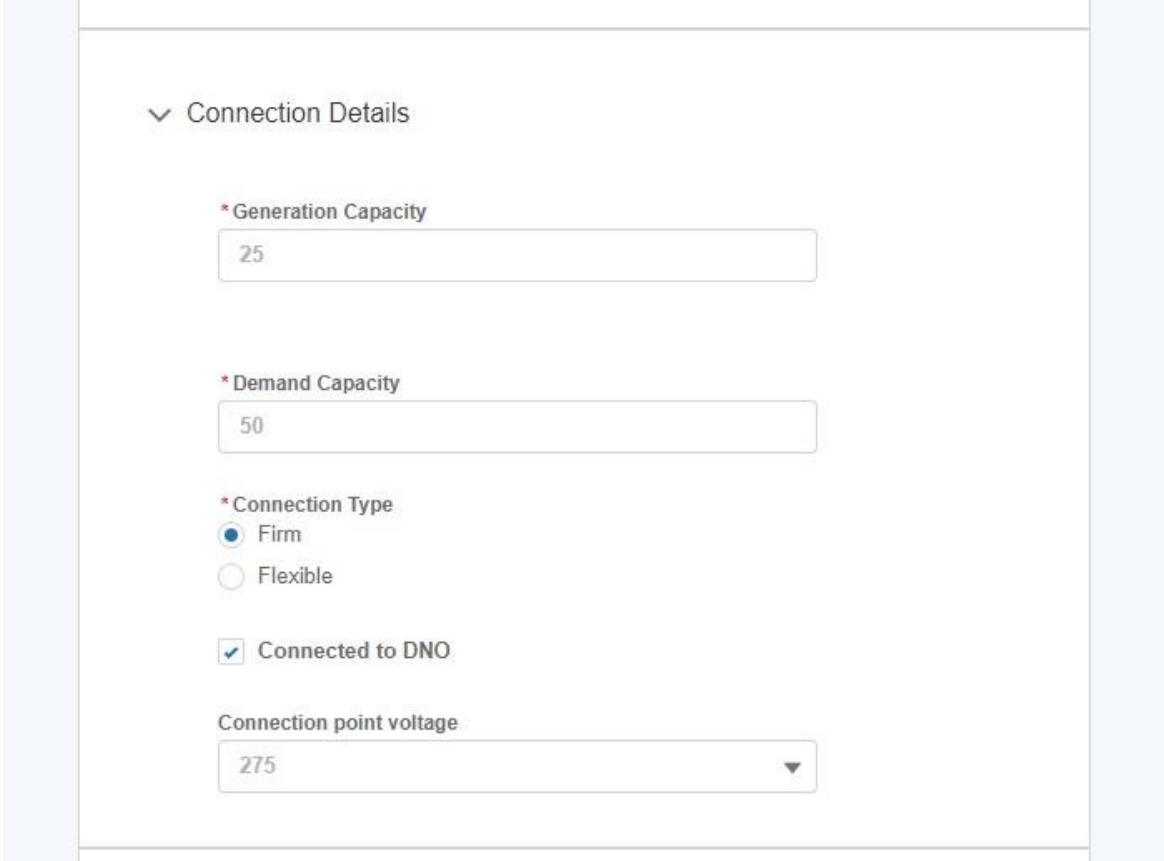
* Fuel Type

Select Fuel Type

4.4. Asset Registration: Asset Connections Section

- Figure 25.0 illustrates the Asset Connection Details Section for the Asset.
- Please note that as the *Generation Capacity*, *Demand Capacity*, the *Connection Type* are all mandatory and therefore marked with a red asterisk. It is essential that these fields have information submitted.

Figure 25.0: Completing the 'Asset Connection Details' Section



▼ Connection Details

* Generation Capacity
25

* Demand Capacity
50

* Connection Type
 Firm
 Flexible

Connected to DNO

Connection point voltage
275 ▼

4.5. Asset Registration: Asset Site Location

- Figure 26.0 illustrates the Site Location Section for the Asset.
- Please note that the *Asset Latitude*, *Asset Longitude*, the *Nearest Node*, *Grid Supply Point*, *GSP Group ID*, *GSP Group ID (location picklist)*, *Primary Dispatch phone number* & *Secondary dispatch phone number* are all mandatory and therefore marked with a red asterisk. It is essential that these fields have information submitted.
- The Grid Supply Point (GSP) field is multiple choice, so a user can select several values as indicated in the figure below.
- Please ensure that the following fields meet the requirements:
 - The Asset Latitude field requires a value between -90 and 90.
 - The Asset Longitude field requires a value between -180 and 180.
 - The phone number and fax fields require a value with 10 digits.
 - The Agent/Applicant Operational Email field requires the value to be in a valid email format.

4.6. Asset Registration: Asset Site Location

Figure 26.0: Completing the 'Asset Site Location Details' Section

Site Location

* Street * City

* State/Country * Country

* Post Code Post Code

* Asset Latitude 1234 * Asset Longitude 1234
Please enter a value between -90 to 90 Please enter a value between -180 to 180

* Nearest node

* GSP Group Id Select Group Id

* Grid Supply Point (GSP)

ABHA_1
ABNE_3
ABTH_1
ALDW_31
ALDW_32
ALNE_3
ALVE_1

* Primary despatch phone number United Kingdom (44) 123
Enter a valid primary despatch number

* Secondary despatch phone number United Kingdom (44) 123
Enter a valid secondary despatch number

Despatch fax number United Kingdom (44) 123
Enter a valid fax number

Site Contact Name Site Contact Number

Agent/Applicant Operational Email test@email@ Agent/Applicant Operational Phone
Please input a properly formatted email address

Asset Size(MW)

4.7. Asset Registration: Asset MPAN Details

- Figure 27.0 illustrates the MPAN Details Section for the Asset.
- Please note that the *Operational Metering Availability* & *MPAN Import Fields* are all mandatory and therefore marked in a red asterisk. It is essential that these fields have information submitted.
- For additional clarification, the user can hover over the 'i' icon for 'Help Text' as illustrated in the figure below.

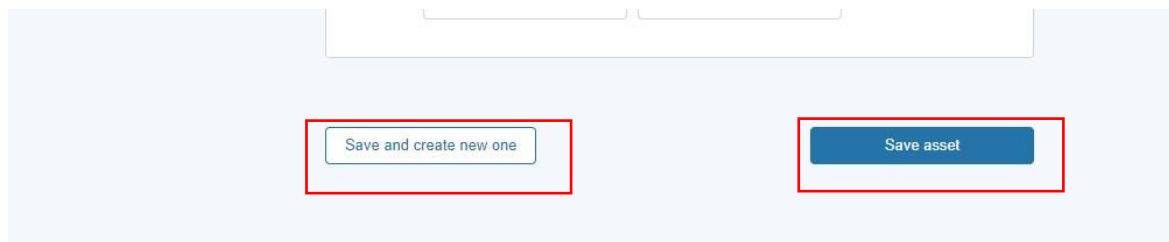
Figure 27.0: Completing the 'Asset MPAN Details' Section

The screenshot displays the 'MPAN' section of a form. It includes a dropdown menu for 'MPAN' and several input fields. The first field is a radio button group for '* Operational Metering Availability' with 'Yes' selected. Below it are two text input fields: '* MPAN Import' and '* MPAN Export', both marked as mandatory with red asterisks and help icons. The 'MPAN Import' field has a red border and the text 'Complete this field.' below it. At the bottom, there are two more text input fields: 'Additional MPAN Import' and 'Additional MPAN Export', also marked as mandatory with red asterisks and help icons.

4.8. Asset Registration: Save Asset Detail Submission.

- Once all the sections are completed correctly, then the 'Save Asset' button will appear in a blue background, enabling the user to complete the registration process for creating the asset.
- If the User wishes to repeat the exercise and create subsequent assets, they can select the 'save and create new one' button instead.

Figure 28.0: Confirmation of Asset Saved Successfully.



4.9. Asset Registered: Asset Tile

Following on from the Asset Registration, the asset tile will appear on the Unit Management Home Page under the **'Asset Tab'**. Each asset will have a corresponding tab. The tile displays the 'key or summary information'. To view the full registration details, click on the **three dots on the right-hand corner of the tile**. The user then selects the **'View Asset Details'** link to be re-directed to the Asset Detail page expanded version.

Please note that Users will be expected to submit all asset information at once. Upon 'saving the asset' registration details, the Asset Status will appear as 'Accepted' automatically as illustrated in Figure 29.0

Figure 29.0: Asset Tiles

The screenshot displays the 'Assets' section of a user interface. At the top, there are two tabs: 'Units' and 'Assets', with 'Assets' being the active tab. Below the tabs, it indicates '2 asset(s)'. Two asset tiles are shown side-by-side. Each tile has a title, a status indicator (a green dot followed by the word 'Accepted'), and a list of attributes. The first tile is for 'Peacehaven Wind Farm' (Asset Id: AST-0174, Type: Demand Unit, Generation Capacity: 60 MW, Demand Capacity: 60 MW). The second tile is for 'Roedean Wind Farm' (Asset Id: AST-0173, Type: Generation Unit; Demand Unit, Generation Capacity: 25 MW, Demand Capacity: 50 MW). Red boxes highlight the 'Accepted' status and the three-dot menu icon in the top right corner of each tile. At the bottom right, there is a 'Load more' button and a counter '2 / 2 asset(s)'.

Asset Name	Asset Id	Type	Generation Capacity (MW)	Demand Capacity (MW)
Peacehaven Wind Farm	AST-0174	Demand Unit	60	60
Roedean Wind Farm	AST-0173	Generation Unit; Demand Unit	25	50

5. Creating & Managing Units

5.1. Create a Unit

- To register a new Unit, the first step is to click on the 'Create new unit' where a user will be presented with the screen illustrated in Figure 29.0 'New Unit registration' where a unique Unit name will be required. Please note that, firstly, a Unit cannot be created without a Unit name and secondly, the name must be **unique in naming convention to the Unit in question**. Once the Unit name is provided, the user will be able to progress to the next step by clicking **Create**.

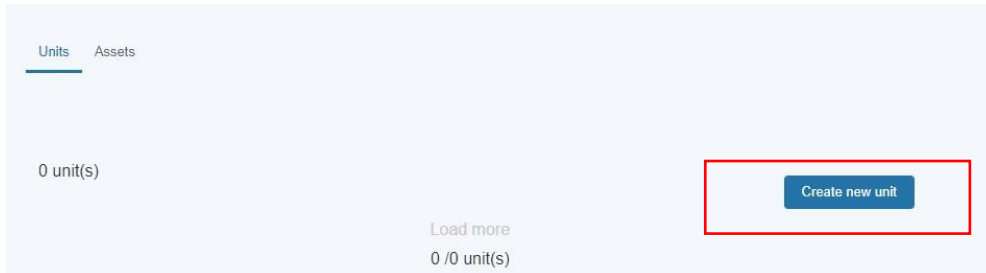
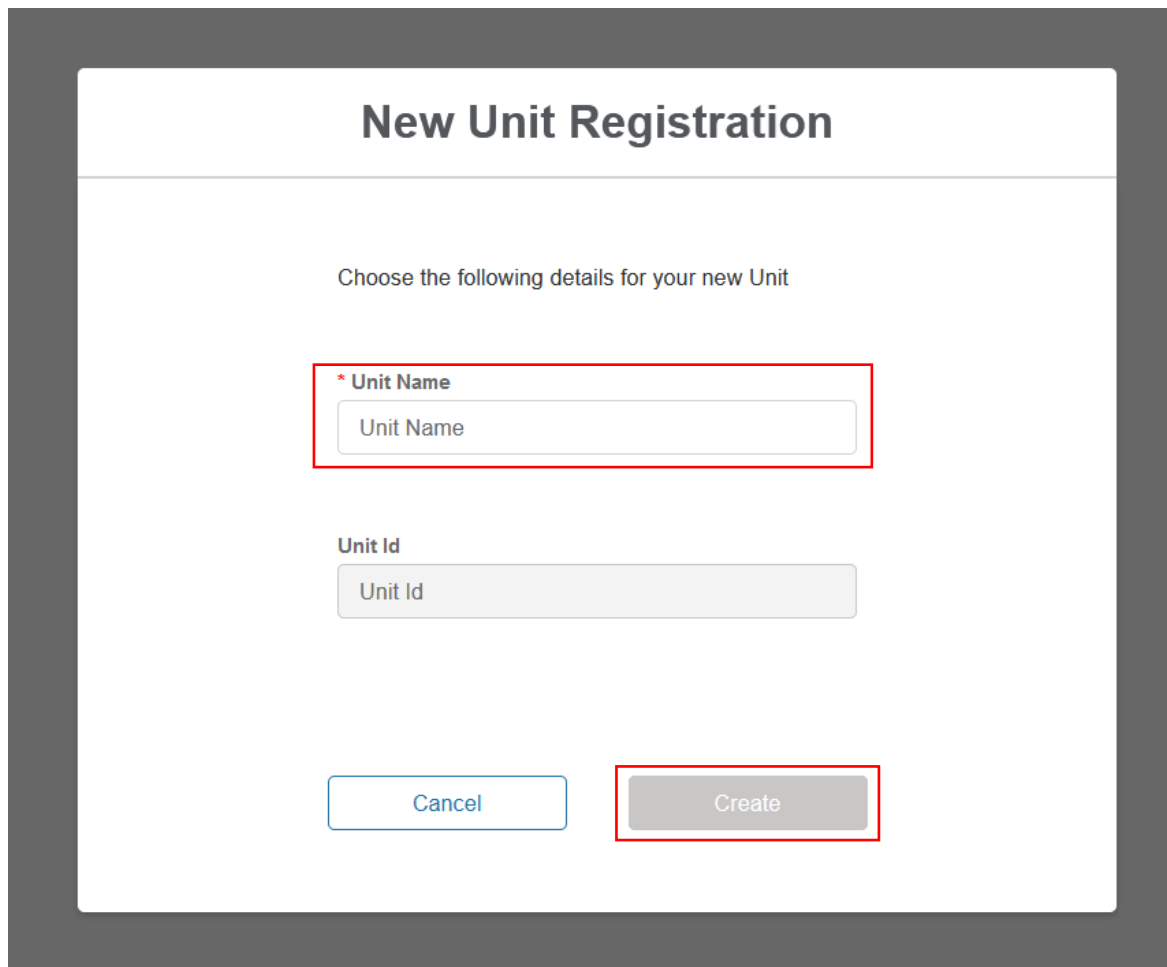


Figure 29.0: Create Unit

A screenshot of a 'New Unit Registration' form. The title 'New Unit Registration' is centered at the top. Below the title, the instruction 'Choose the following details for your new Unit' is displayed. The form contains two input fields: 'Unit Name' and 'Unit Id'. The 'Unit Name' field is marked with an asterisk (*) and is highlighted with a red rectangular box. At the bottom of the form, there are two buttons: 'Cancel' and 'Create'. The 'Create' button is highlighted with a red rectangular box.

5.2. Unit Registration: Overview Page

- The user is navigated to the Unit Registration Page as outlined in Figure 30.0, the format is similar to the Asset Registration Page structure with an accordion section on the left-hand side for direct navigation to a specific section or the user can select the subsection they wish to complete.
- The figure illustrates the unique named Unit for which the details are being registered; 'Sussex Coast Renewables'
- Please note that the user is not able to progress the registration process for a created Unit without completing all the sections and corresponding fields.

Figure 30.0: Unit Registration Detail Page

The screenshot shows a web interface for 'New Unit Registration'. At the top, the title 'New Unit Registration' is displayed. Below it, the unit name 'Sussex Coast Renewables' is shown in a red-bordered box. A subtitle reads: 'Complete all the information below in order to complete the registration of a new unit'. On the left, there is a vertical navigation menu with three items: '1 Unit Details', '2 Connection Details', and '3 Site Location', all enclosed in a red-bordered box. The main content area is an accordion with three sections: 'Unit Details', 'Connection Details', and 'Site Location', each with a right-pointing chevron and enclosed in a red-bordered box. At the bottom, there are two buttons: 'Save and create new one' (disabled) and 'Save unit' (disabled).

5.3. Submitting Unit Information: Unit Details Section

- Figure 31.0 illustrates the Detail Section for the Unit.
- Please note that the *Unit Type*, the *Effective from Date* and *Fuel Type* are all mandatory and therefore marked with a red asterisk. It is essential that these fields have information submitted.

Figure 31.0: Completing the ‘Unit Details’ Section

Complete all the information below in order to complete the registration of a new unit

- 1 Unit Details
- 2 Connection Details
- 3 Site Location

Unit Details

*Unit Type

Generation Unit

Demand Unit

*Effective From Date

01-Jul-2022

*Fuel Type

Wind

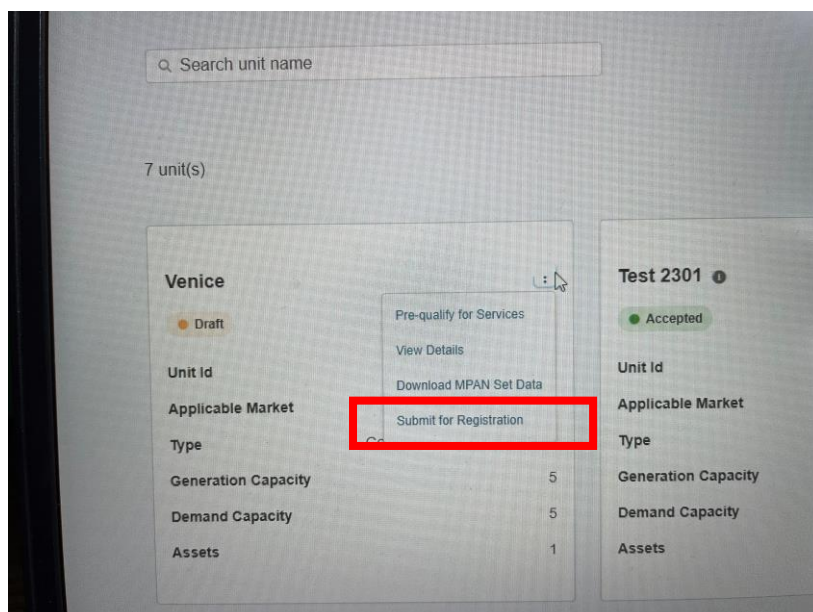
Applicable Market

Balancing Services

5.4. Submitting Unit Registration for Approval

Once the finalised alignment of Asset(s) to Unit has been completed, to signify the submission of the Unit Registration has been undertaken, the Portal User will have to select the ‘**Submit for Registration**’ option on the drop down menu as indicated on the picture below.

Once this option is selected, the Unit is considered for appraisal by the Registrations Team at the ESO. Please note that Units in Submitted State are considered different then Draft, where the assumption is that alignment or Asset(s) has not taken place or not finalised.



Classification of Unit Category

As of Release 2.7, the user must select a Category for their unit. If Demand Flexibility Service is selected as the Applicable Market, 'Non-BMU' will be automatically selected as the Category. If the Category is not known, the user can click 'Find Unit Category' to be guided through a wizard that will help them determine their category.

Unit Details

Please select the market you intend to apply for from the list below.

Note: Balancing Services applicable market includes Dynamic Containment, Dynamic Regulation, Dynamic Moderation and Balancing Regulating Reserve.

* Applicable Market ⓘ
Balancing Services ▼

* Unit Category
Select Unit Category ▼ Find Unit Category

* Unit Type
 Generation Unit
 Demand Unit

* Effective From Date
Effective From Date 📅

* Fuel Type ⓘ
Select Fuel Type ▼

Upon selecting 'Find Unit Category', the user is asked if they are registering a BMU or Non-BMU unit.

Find Unit Category

Are you registering a BMU or Non-BMU today?

BMU

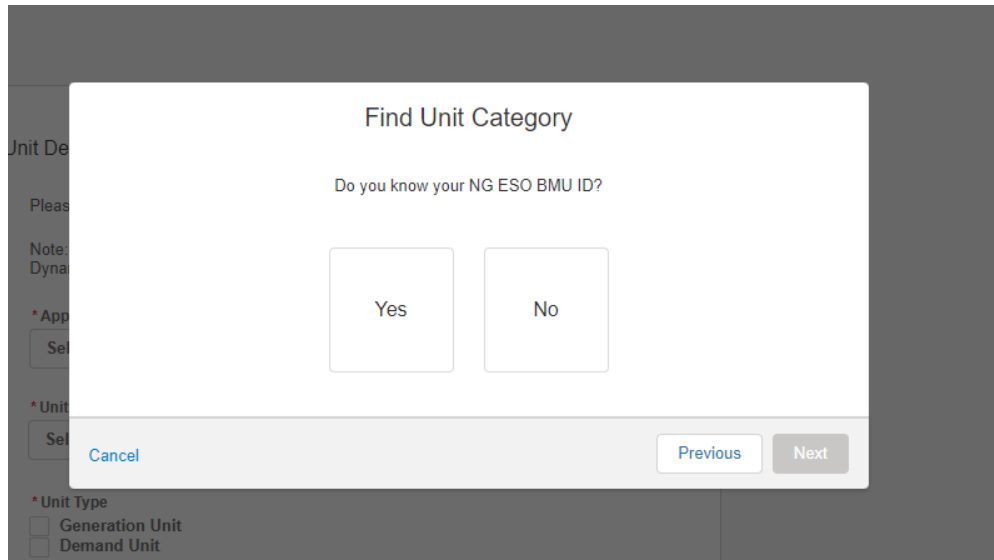
Non-BMU

A BM unit (Balancing Mechanism Unit) consists of a plant and/or apparatus (independently controlled) that trades its energy daily with NGENSO through the Balancing Mechanism and is a party to the Balancing and Settlements Code (BSC).
Non-BM units (Non-Balancing Mechanism) can provide Balancing Services to NGENSO but do not trade through the Balancing Mechanism.

CancelNext

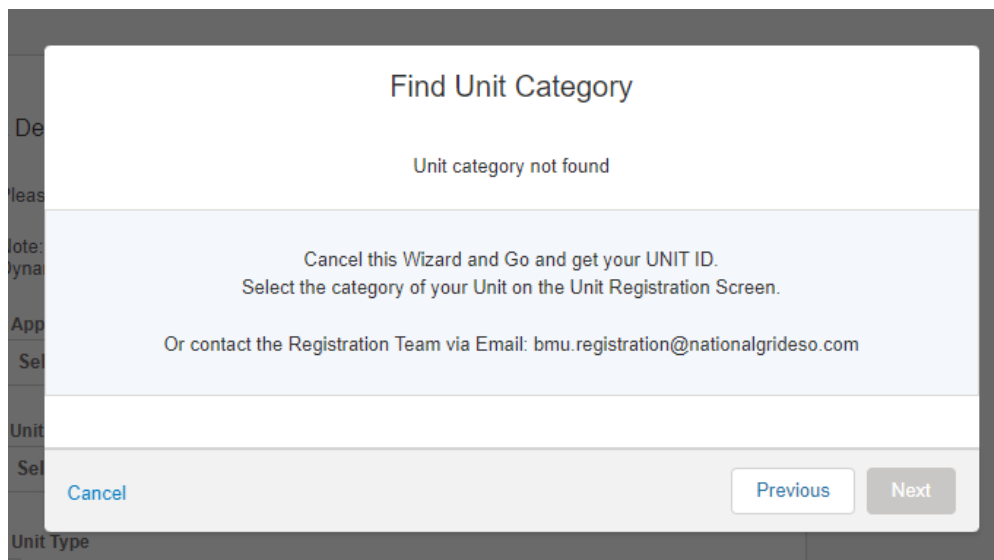
Classification of Unit Category

Selecting 'Non-BMU' will lead to a recommendation of non-BMU as a category. Pressing 'Select' on this screen will automatically populate the value of the Category field. Selecting 'BMU' will lead to the user being asked if they know their NG ESO BMU ID



The screenshot shows a modal dialog titled "Find Unit Category". The main text inside the dialog asks, "Do you know your NG ESO BMU ID?". Below this question are two buttons: "Yes" and "No". At the bottom of the dialog, there are three buttons: "Cancel" (highlighted in blue), "Previous", and "Next". The background of the application is dimmed, showing parts of a form with labels like "Unit De", "Pleas", "Note: Dyna", "* App", "Sel", "* Unit", "Sel", "* Unit Type", "Generation Unit", and "Demand Unit".

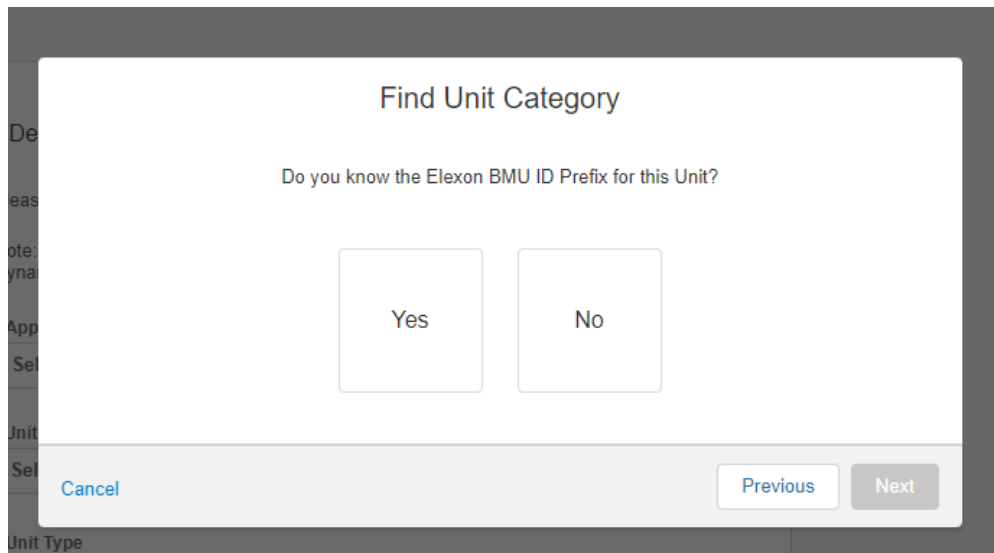
If 'Yes' is selected, the next screen will advise the user to cancel the wizard to get their Unit ID and then select the category of their unit on the registration screen.



The screenshot shows the same "Find Unit Category" dialog box, but with an error message. The main text says "Unit category not found". Below this, there is a light blue shaded area containing the following text: "Cancel this Wizard and Go and get your UNIT ID. Select the category of your Unit on the Unit Registration Screen. Or contact the Registration Team via Email: bmu.registration@nationalgrideso.com". At the bottom of the dialog, there are three buttons: "Cancel" (highlighted in blue), "Previous", and "Next".

If 'No' is selected, the user is asked if they know their Elexon BMU ID Prefix for this Unit.

Classification of Unit Category



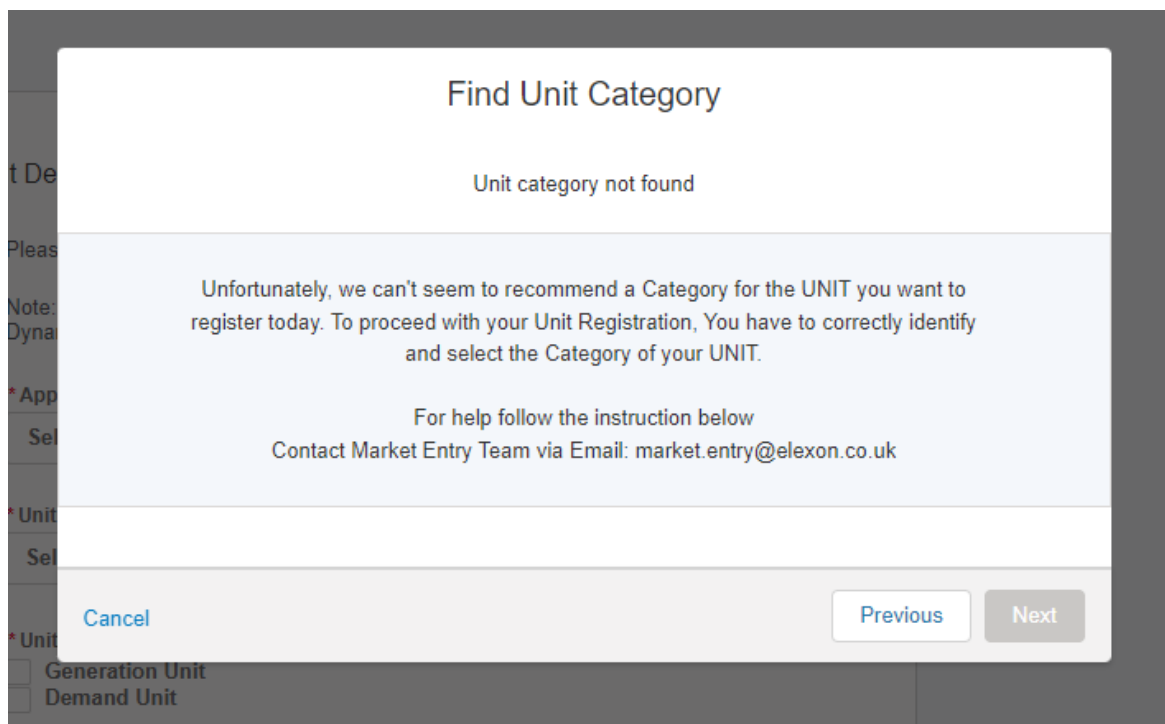
Find Unit Category

Do you know the Elexon BMU ID Prefix for this Unit?

Yes No

Cancel Previous Next

Selecting 'No' will lead to a screen advising the user to contact the Market Entry team at Elexon.



Find Unit Category

Unit category not found

Unfortunately, we can't seem to recommend a Category for the UNIT you want to register today. To proceed with your Unit Registration, You have to correctly identify and select the Category of your UNIT.

For help follow the instruction below
Contact Market Entry Team via Email: market.entry@elexon.co.uk

Cancel Previous Next

Selecting 'Yes' will prompt the user to select the Elexon BMU ID Prefix they have.

Classification of Unit Category

Find Unit Category

What Elexon BMU ID Prefix do you have?

2_ V_ T_, E_, I_,
C_, M_

Cancel Previous Next

2_ will identify the unit as Additional Supplier BMU

Find Unit Category

We have found your Unit Category

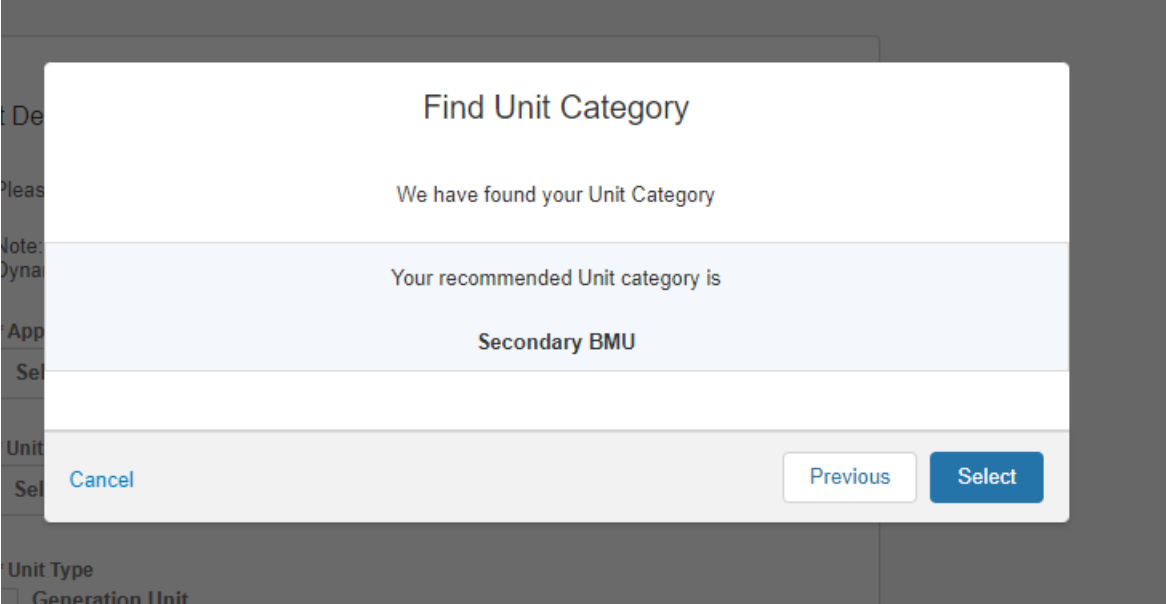
Your recommended Unit category is

Additional Supplier BMU

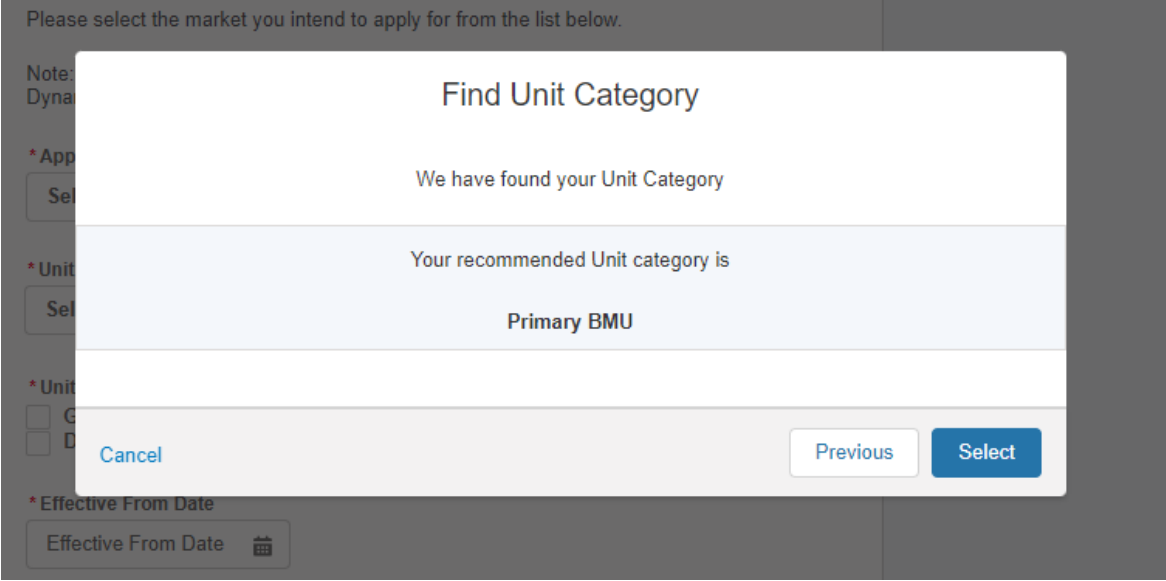
Cancel Previous Select

V_ will identify it as 'Secondary BMU

Classification of Unit Category



T_,E_,I_,C_,M_ will identify it as 'Primary BMU'



5.5. Submitting Unit Information: Unit Connection Section

- Figure 32.0 illustrates the Unit Connection Details Section for the Asset.
- Please note that the *Generation Capacity*, *Demand Capacity*, *Connection Type* and *DNO Type* (picklist field) are all mandatory and therefore marked with a red asterisk. It is essential that these fields have information submitted.

Figure 32.0: Completing the ‘Unit Connection Details’ Section

The screenshot displays a web interface for entering unit connection details. On the left, a sidebar contains three numbered steps: 1. Unit Details (highlighted), 2. Connection Details, and 3. Site Location. The main content area is titled '> Unit Details' and features a section for 'Connection Details' with a downward arrow. This section includes several mandatory fields, each marked with a red asterisk: 'Generation Capacity' (text input with value 25), 'Demand Capacity' (text input with value 100), 'Connection Type' (radio buttons for 'Firm' and 'Flexible', with 'Firm' selected), 'Connected to DNO' (checkbox, checked), 'DNO Type' (picklist dropdown with 'UK Power Networks' selected), and 'Connection point voltage' (picklist dropdown with '400' selected).

5.6. Submitting Unit Information: Unit Site Location Section

- Figure 33.0 illustrates the Unit Site Location Section for the Unit
- Please note that the *Grid Supply Point*, *GSP Group ID*, *GSP Group ID (location picklist)*, *Primary Dispatch phone number* & *Secondary dispatch phone number* are all mandatory and therefore marked with a red asterisk. It is essential that these fields have information submitted.
- The Grid Supply Point (GSP) field is multiple choice, so a user can select several values as indicated in the figure below.

Figure 33.0: Completing the ‘Unit Site Location Details’ Section

Site Location

Post Code
BN2 4RD

Unit Latitude
2

Unit Longitude
2

Nearest node (if known)

* Grid Supply Point (GSP)

ABHA_1	▶	ABNE_3	▲
ABTH_1		ALNE_3	
ALDW_31	◀	AMEM_1	▼
ALDW_32		ARMO_3	
ALVE_1			
ARBR_3			
AXMI_1			

* GSP Group Id
London

* Primary despatch phone number
United Kingdom (44) 6464578574

* Secondary despatch phone number
United Kingdom (44) 5756767865

Despatch fax number
Select country code

5.7. Submitting Unit Information: Confirmation of Submission.

- Once all the sections are completed correctly, then the 'Save Unit' button will appear in a blue background, enabling the user to complete the registration process for creating the Unit.
- If the User wishes to repeat the exercise and create subsequent Units, they can select the 'save and create new one' button instead.

Figure 34.0: Confirmation of Asset Saved Successfully.

New Unit Registration

Sussex Coast Renewables

Complete all the information below in order to complete the registration of a new unit

1 Unit Details

2 Connection Details

3 Site Location

> Unit Details

> Connection Details

> Site Location

Save and create new one

Save unit

5.8. Modifications to Registration of Units

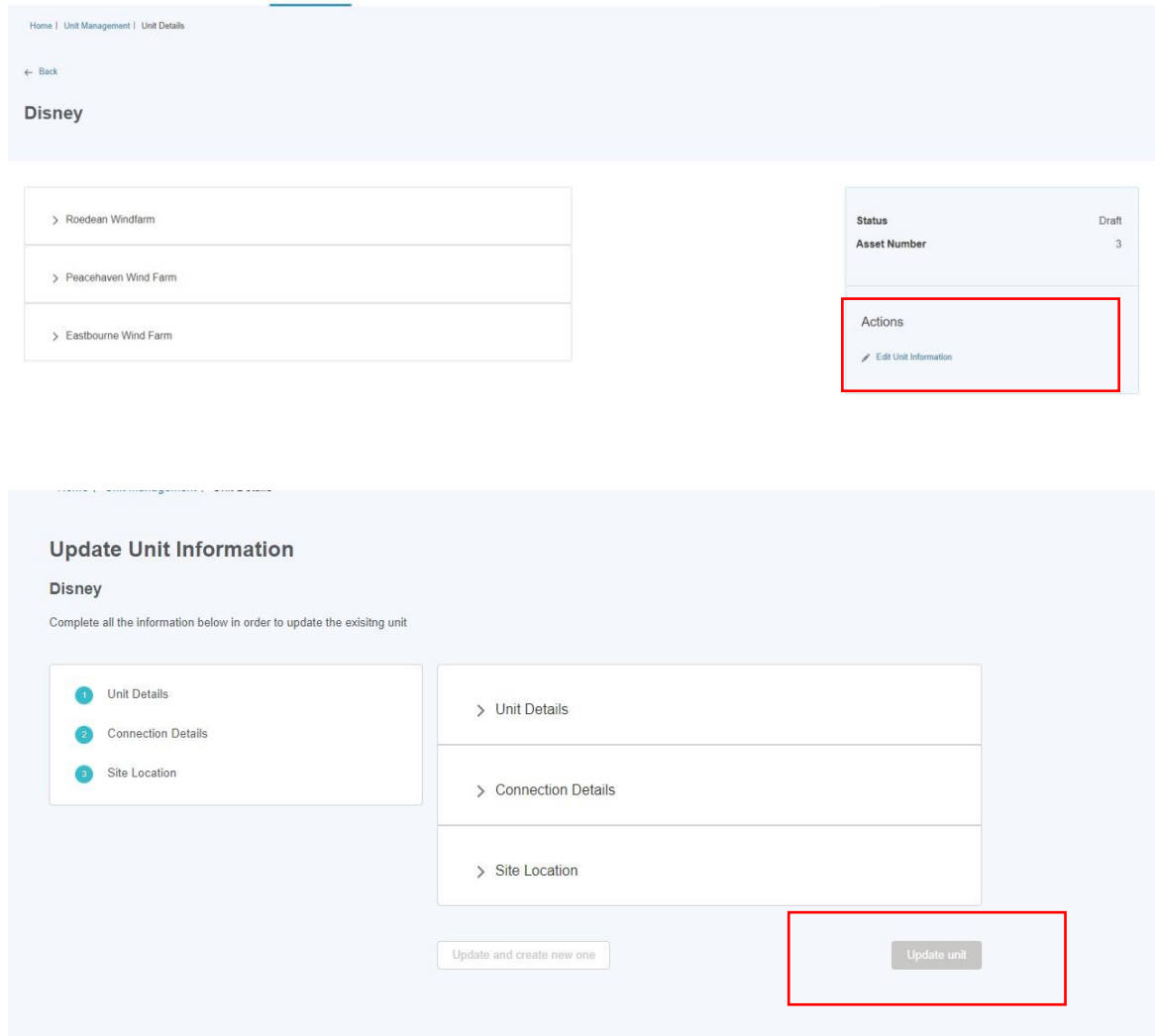
- Following on from the Unit Registration, the asset tile will appear on the Unit Management Home Page under the **'Units'** Tab. Each asset will have a corresponding tab. The tile displays the 'key or summary information'. To view the full registration details, click on the **three dots on the right-hand corner of the tile**. The user then selects the **'View Unit Details'** link to be re-directed to the Unit Detail page expanded version.
- Users have the ability to retrospectively edit Unit Registration Details before final submission. Upon 'saving the Unit' registration details, the Unit Status will appear as 'Draft' automatically as illustrated in Figure 35.0
- To make edits, the user should click on **'Edit Unit Details'** link to be re-directed to the Unit Detail page expanded version. They then have the ability to edit the sections or specific fields desired. The Unit Status will appear as 'Submitted' once the Unit is finally submitted for consideration.
- Once the Unit is submitted for approval, the NGESO Registration Team will a) assign the Unit a Unit ID (which will auto populate on the Unit Id field) b) set the Unit Status field from 'submitted' to 'approved' or 'rejected'.

Figure 35.0: Unit Tiles

The screenshot displays the 'Unit Management' interface. At the top, there are tabs for 'Units' and 'Assets', with 'Units' selected. Below the tabs, it indicates '1 unit(s)'. A unit tile is shown for 'Sussex Coast Renewables'. The tile includes a 'Draft' status indicator (a yellow circle with the word 'Draft' next to it) and a menu icon (three vertical dots) in the top right corner. Below the title, there are several fields: 'Unit Id', 'Type' (with a dropdown menu showing 'Generation Unit; Demand Unit'), 'Generation Capacity(MW)' (25), 'Demand Capacity(MW)' (100), and 'Assets' (0). At the bottom right of the interface, there is a 'Load more' link and a count '1 / 1 unit(s)'.

5.9. Modifications to Registration of Units - cont.

Figure 35.1: Edit Unit Details & View Expanded Unit Details Page for Editing



As of Release 2.8, there are 3 new fields applicable to units where the Applicable Market = Demand Flexibility Service.

- Are you a Supplier of Electricity?
- DFS Unit Type
- DFS Initiation Measures

If the user has a DFS Unit where the Status is Accepted, they will be able to edit the Unit in order to provide values in these fields. To do so, click on the 3 dots on the Unit tile, then View Details

5.10. Modifications to Registration of Units - cont.

12 unit(s)

DFS 2209

● Accepted

Unit Id

Applica

Type Demand Unit

Demand Capacity 12

- Pre-qualify for Services
- View Details**
- Download MPAN Set Data
- Create new version
- Deregister Unit

Then select 'Edit Unit Information'.

DFS 2209

Applicable Market	Demand Flexibility Service
Status	Accepted

Actions

- Edit Unit Information**

5.11. Modifications to Registration of Units - cont.

The user will then be able to update the fields listed above.

Note: Balancing Services applicable market includes Dynamic Containment, Dynamic Regulation, Dynamic Moderation and Balancing Regulating Reserve.

*** Applicable Market** ⓘ

Demand Flexibility Service ▼

*** Are you a Supplier of Electricity?** ⓘ

Yes ▼


*** Unit Category**

Non-BMU ▼ [Find Unit Category](#)

*** Unit Type**

Demand Unit

*** Effective From Date**

29-Sept-2023 

Fuel Type

Load Response

∨ Connection Details

*** Demand Capacity** ⓘ

12

DFS Unit Type ⓘ

Select DFS Unit Type ▼

DFS Initiation Measures ⓘ

Select an Option ▼

Once they have selected values for all 3 fields and pressed 'Update Unit' they will no longer be able to edit the unit.

Deregistration of Units

- Portal User can initiate the de-registration of a Unit only on the condition it is in 'Accepted' Status. A Unit that warrants De-Registration is defined as a Unit that ceases to continue operating.
- To start the process, click the icon containing three dots on a tile of an accepted unit and then click 'Deregister Unit', as illustrated in Figure 35.2.
- A pop-up window (shown in Figure 35.3) will appear, which informs the user that an email will be sent to the National Grid ESO Registration Team, who will complete the process offline. Click 'Continue' to proceed with the deregistration of the unit.
- Another pop-up window (shown in Figure 35.3) will appear, asking the user to select an 'Effective to' date. This date needs to be in the future and cannot be less than the 'Effective from' date of the Unit's original version. After clicking 'Submit', a green confirmation banner will appear at the top of the screen.
- The Approval Request will be directed towards the National Grid ESO Registration Team who will either decide to Approve or Reject the Unit De-registration request.
- If the Decision is to approve the request, then the Unit will no longer appear on the Unit Management screen and the user will also receive an email to confirm that the Unit has been deregistered (See Figure 35.4 overleaf).

If however the Registration Team Reject the deregistration request, then the user will receive an email to let them know the request was rejected.

Once the 'Effective to' date has passed, the unit will no longer be visible on the Unit Management page.

5.12. Process for Deregistering Units

Figure 35.2: Deregister a Unit

The screenshot shows the 'Unit Management' interface. At the top, there is a notification: 'If you want to create the UNIT for RDP MW Dispatch, Please register a new Asset and the UNIT will be created automatically.' Below this, there are tabs for 'Units' and 'Assets'. A search bar is present with the placeholder text 'Search unit name'. Below the search bar, it indicates '12 unit(s)'. Three unit cards are displayed:

- Unit 1:** Status: Draft. Unit Id: 1203. Applicable Market: Balancing Services. Type: Generation Unit. Generation Capacity(MW): 298. Demand Capacity(MW): 0.
- Unit 2:** Status: Accepted. Unit Id: 1203. Applicable Market: RDP MW Dispatch. Type: Generation Unit. Generation Capacity(MW): 12. Demand Capacity(MW): 0. A red box highlights the menu icon, and a pop-up window is open with 'Deregister Unit' highlighted in red.
- Unit 3:** Status: Draft. Unit Id: 1203. Applicable Market: Balancing Services. Type: Demand Unit. Generation Capacity(MW): 0. Demand Capacity(MW): 76.

Figure 35.3: Pop-up Window for Deregistering a Unit

5.13. Process for Deregistering Units (cont.)

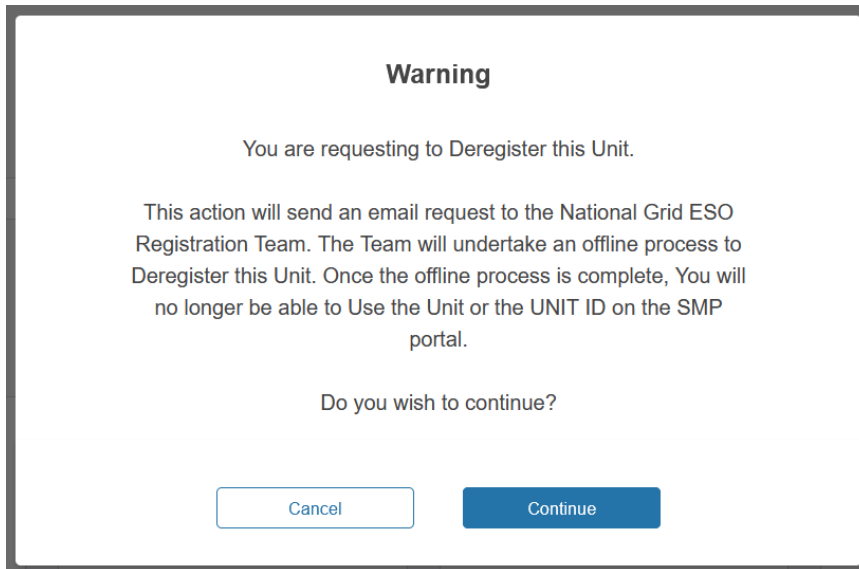
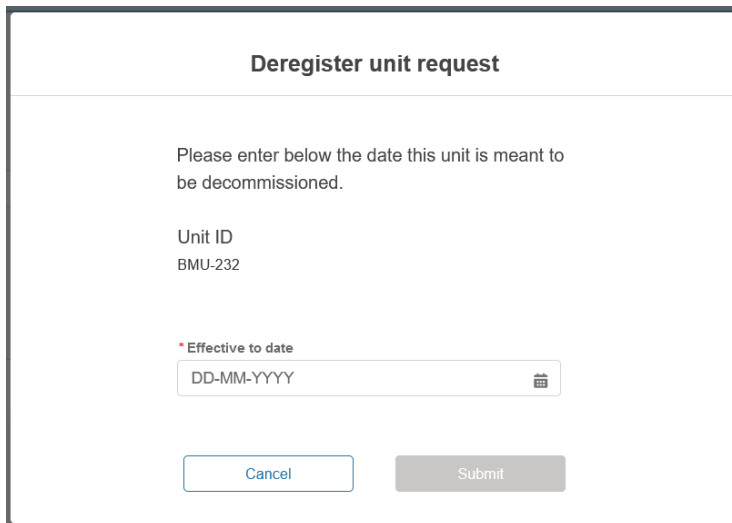
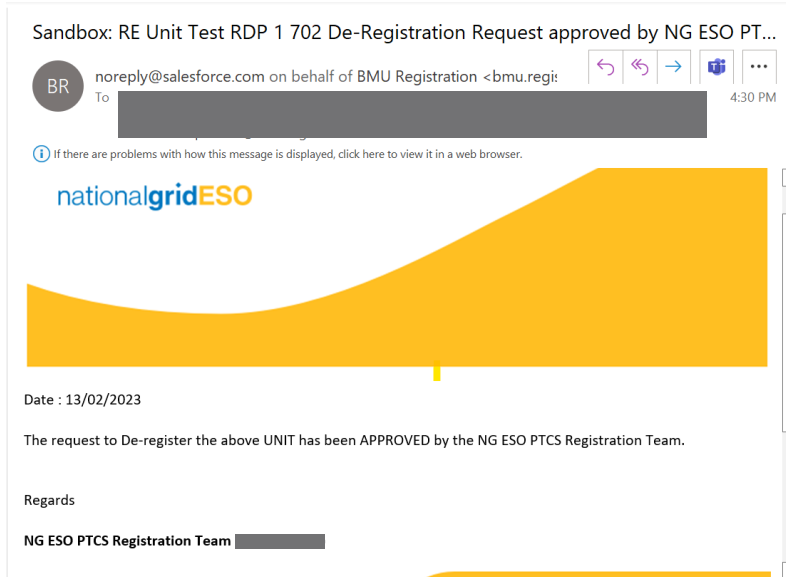


Figure 35.4: Pop-up Message for 'Effective To' Date



5.14. Process for Deregistering Units (cont.)

Figure 35.4: Deregistration Request Email



6. Asset to Unit Alignment

6.1. Grouping Assets by Unit (Asset Alignment)

- Prior to initiating the Pre-qualification Process, the registered asset(s) must be aligned to a specified Unit(s). To align assets to units, it is pre-supposed that the asset(s) and the unit(s) have all been registered in advance. If this is not the case, the user must ensure these steps are completed.
- Upon initial registration of an asset the 'status' will be set to 'Accepted' by default as indicated on the tile in Figure 36.0.
- When ready, the User must select 'Align Assets to Units' on the Unit Management Landing Page

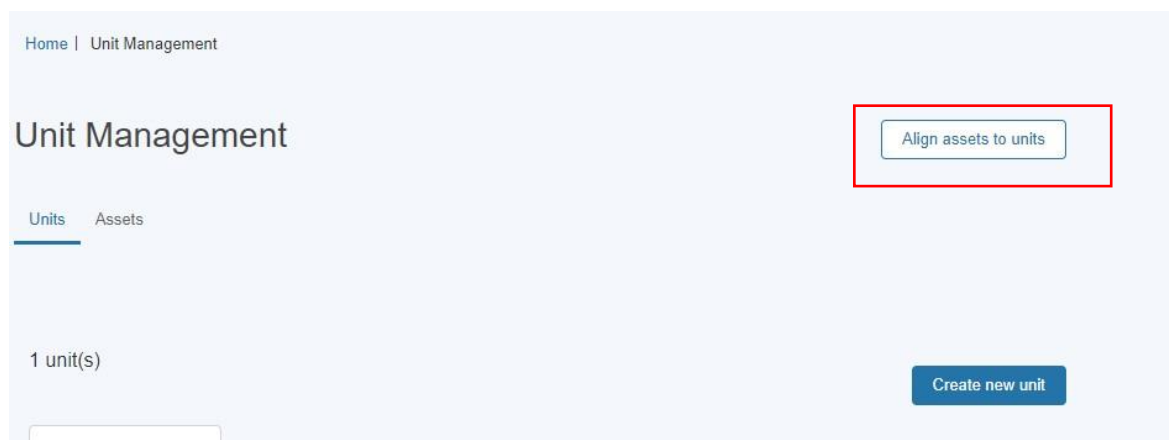
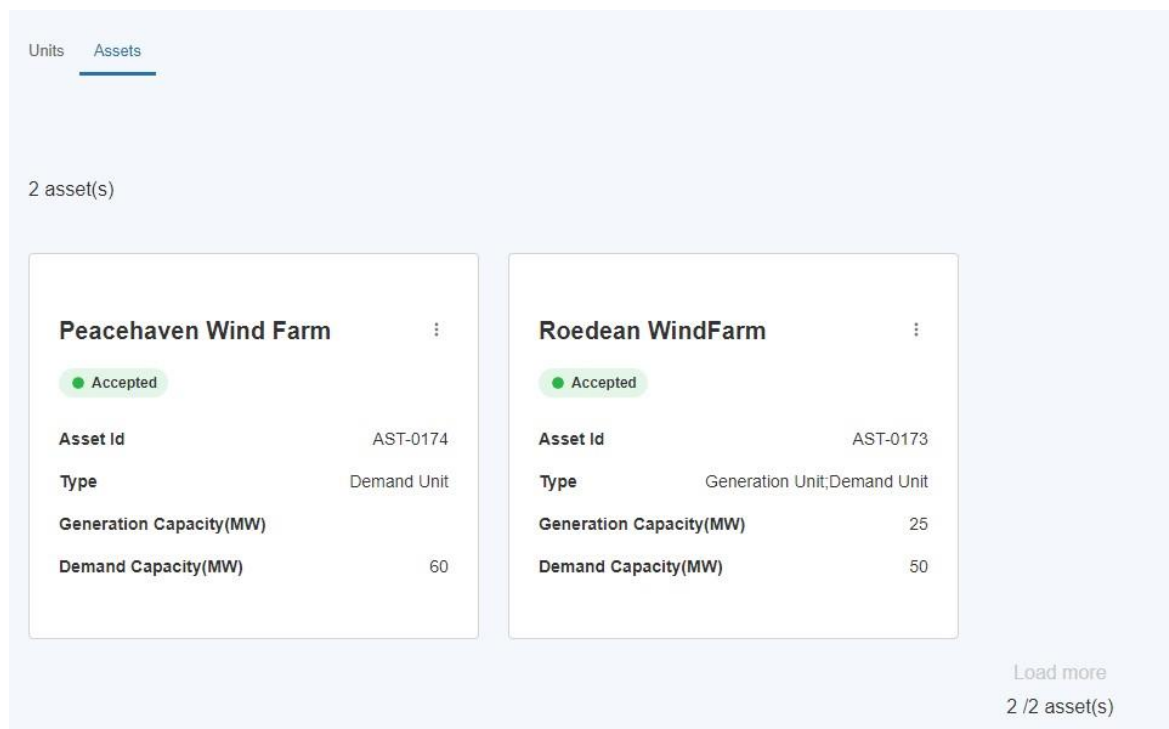


Figure 36.0: Align Assets to Unit



6.2. Selecting Unit for Grouping

- The User will be prompted to select or identify the Unit for grouping or alignment. The user can search by entering the Unit Name in the search bar. Please note the exact naming of the Unit to produce a successful search result.
- The exact generic name of the Unit must be entered in the search bar in order to determine a successful result.
- A unit can only be aligned if its Status is equal to 'Draft'. Once has a Unit has been appraised by the Registrations Team and set to 'Accepted' it is no longer available for re-alignment. If the situation arises where the Unit in question requires an amendment or modification to its asset(s) then the Unit in question must undergo the Unit Versioning Process. To learn more about Unit Versioning, refer to the Chapter on Unit Versioning.



Home | Unit Management | Align assets to unit

← Back

Align assets to unit

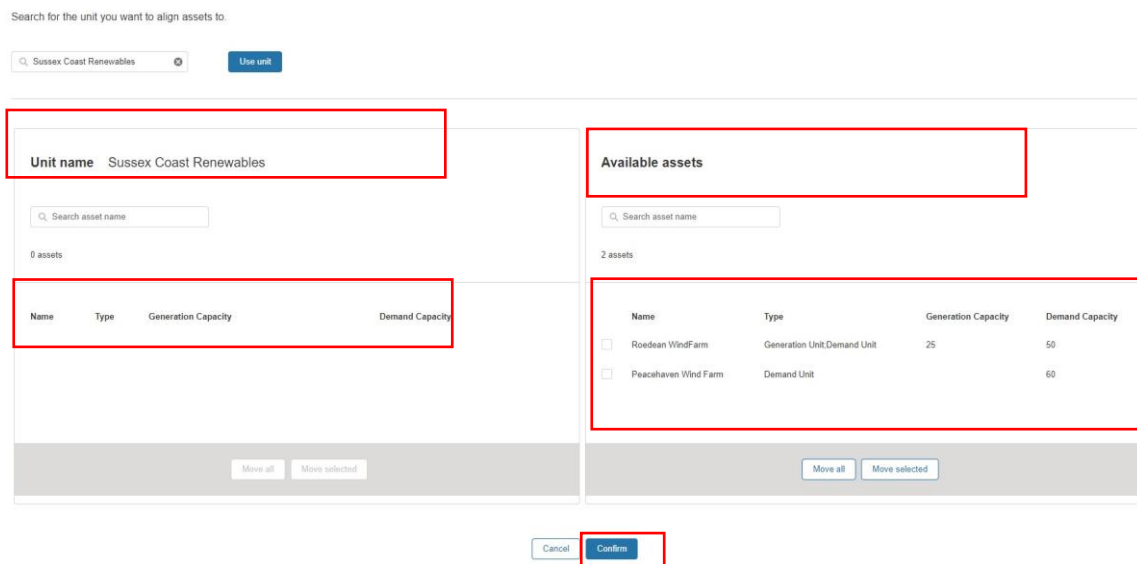
Search for the unit you want to align assets to.

Use unit

6.3. Match & Un-matching selected assets to Unit for Grouping

- The User will be presented with two adjacent columns 1) the Unit selected in the search result on the left-hand column and 2) all available registered assets eligible for grouping on the right-hand side.

Figure 37.0: Asset Alignment Screen



- If an asset is not listed, then the user will still have the option to use the search button to undertake a secondary search of the asset in question. The user must ensure they have the correct unique name reference to ensure a successful search result match. Once the asset(s) are identified, the User can either choose to a) 'move all' or b) 'move selected' assets to be grouped or aligned with the desired unit.
- Once the User is satisfied with the grouping they can then confirm the selection or alignment by selecting the **Confirm button** as illustrated in Figure 37.0 in the adjacent page.
- The User has the option to switch assets out of the grouping by 'moving selected' from the left column (unit name) to the right column (available assets) if they decide it was an incorrect grouping of assets for alignment and wish to reverse their decision before final confirmation. To enable this feature, the user must check the box against each asset on the left-hand column and select "Move Selected" to transfer the assets back into the right-handed column (available assets). This may be required when a user decides it was an incorrect grouping of assets for alignment and wish to reverse their decision before final confirmation.
- The User will receive a confirmation pop up notification to alert them to the Unit Grouping being completed.

6.4. Match & Un-matching selected assets to Unit for Grouping

Figure 38.0: Asset Alignment Screen – Reverse decision

The screenshot displays the 'Asset Alignment Screen' for the 'Sussex Coast Renewables' unit. The interface is split into two main panels: 'Unit assets' and 'Available assets'.

Unit Assets Panel:

- Unit name: Sussex Coast Renewables
- Search: Search asset name
- Count: 2 assets
- Table:

Name	Type	Generation Capacity	Demand Capacity
<input type="checkbox"/> Roedean Wind Farm	Generation Unit	25	50
<input type="checkbox"/> Peacehaven Wind Farm	Demand Unit		50

Available Assets Panel:

- Search: Search asset name
- Count: 0 assets
- Table:

Name	Type	Generation Capacity	Demand Capacity
------	------	---------------------	-----------------

At the bottom of each panel, there are two buttons: 'Move all' and 'Move selected'. Red boxes highlight these buttons in both panels, indicating the reverse decision process.

6.5. Asset Alignment for multiple units

- There will be a requirement for Users to undertake secondary alignments between assets and additional units beyond the initial grouping. In this instance, users are given the ability to deploy the same assets to be grouped under different Units.
- Figure 39.0 illustrates the example where 2 Units have been created, but both Units will be aligned to one specific asset. For example, Hampshire Coast Renewables Unit is made up of both *Peacehaven Wind Farm* AND *Roe dean Wind Farm*. Sussex Coast Renewables is only made up of Peacehaven Wind Farm. Therefore, the Asset Peacehaven Wind Farm is being aligned to 2 independent Units. This configuration is possible during the registration stage by repeating the asset alignment exercise for each Unit in turn.

Figure 39.0: Multiple Units for Alignment with existing assets

The screenshot displays the 'Unit Management' interface with two tabs: 'Units' (selected) and 'Assets'. Below the tabs, it indicates '2 unit(s)'. Two unit cards are shown, both in 'Draft' status.

Hampshire Coast Renewables	
Unit Id	
Type	Demand Unit
Generation Capacity(MW)	
Demand Capacity(MW)	2
Assets	0

Sussex Coast Renewables	
Unit Id	
Type	Generation Unit, Demand Unit
Generation Capacity(MW)	25
Demand Capacity(MW)	110
Assets	2

Load more
2 / 2 unit(s)

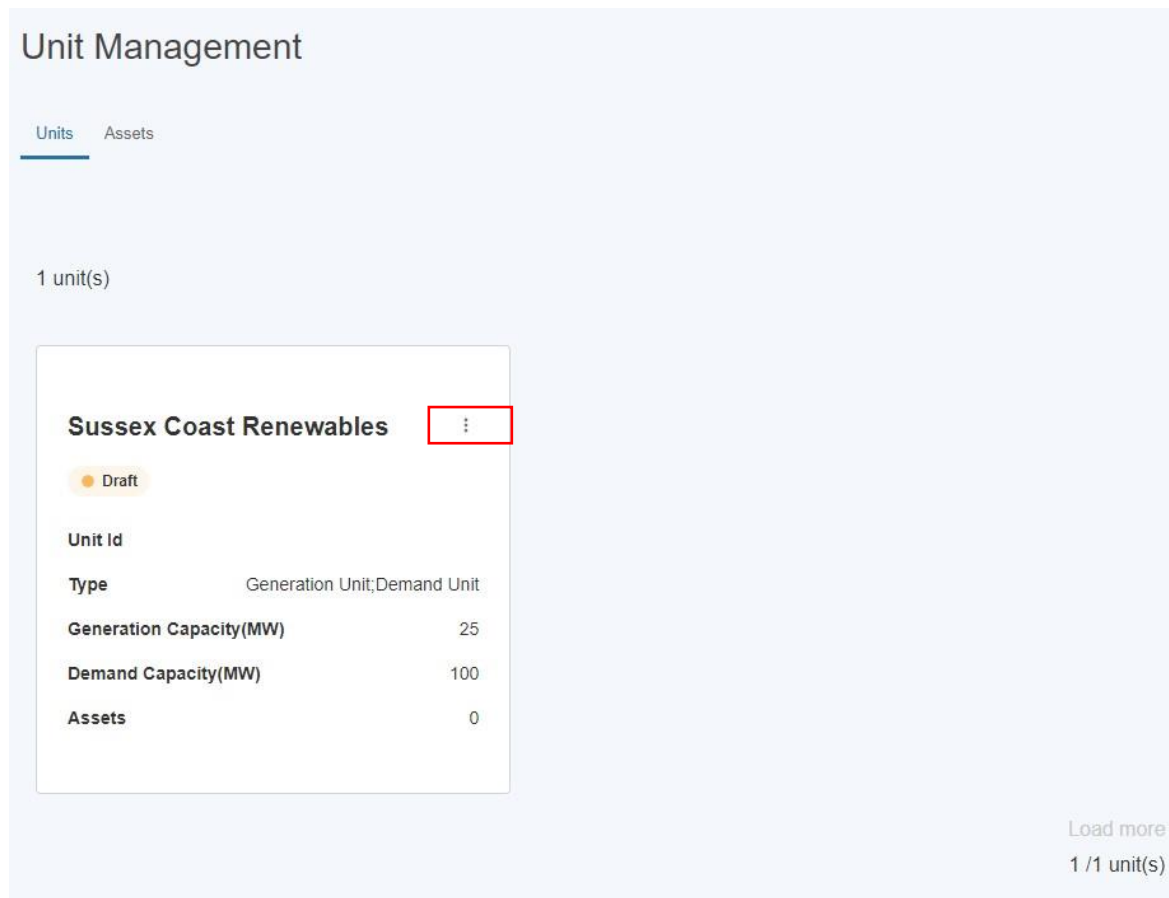
7. Prequalification for Services

7.1. Identifying Units to participate in Pre-qualification.

Once the Units and Assets have been registered and the Alignment exercise has been undertaken, the user is in a position to identify units they wish to elect for participation in the Market and subject to the pre-qualification process.

To start, the user must navigate to the selected unit on the Unit Management home page and hover over the right hand three corner and click on the three dots on the Unit tile as highlighted in the Figure below. They will be prompted with the link **'pre-qualify for services'**.

Figure 40.0: Pre-qualify for Services Link



7.2. Pre-qualification Home Page

The user will then be presented with the Pre-qualify for Services Page as illustrated in Figure 41.0 and prompted to then select the services to pre-qualify the Unit for.

Figure 41.0: Pre-qualify for Services Page

Introduction Section: 'Select Services'

Add the services you want for Test Unit.

This is the Application for Pre-qualification of Unit Test Unit Prior to proceeding with the application please note the following ;

1. This Unit has been pre-qualified for the Services already checked. Please check the boxes for the additional services you wish this Unit to be pre-qualified for. Please note that if you attempt to uncheck the existing service boxes, then you will be confirming you wish to no longer have this Unit pre-qualified for said services upon pressing the Confirm Services button.
2. Supplementary Evidence must be uploaded and appended to under the 'Evidence Application' section before - being able to save a draft version of this application and a minimum of 1 File or Attachment must be uploaded.
3. Please ensure that all the fields marked in a Red Asterix are completed prior to attempting to save the application as draft or proceed through to the Terms & Conditions Section as they are required.
4. Please note that an application can be saved in Draft but only on condition that at least 1 document is uploaded as part of the Application Evidence requirement. A Portal User can return to add additional documents at a later stage and proceed with the final section for Terms & Conditions.
5. Please note that if you are pre-qualifying this Unit for multiple services and need to upload an ITE certificate this only needs to be uploaded against one of the services - you are not required to upload it against each service.

Dynamic Regulation LF Dynamic Regulation HF Dynamic Moderation HF Dynamic Containment LF Dynamic Containment HF Dynamic Moderation LF

Balancing Regulating Reserve Static FFR Firm Frequency Response

[Confirm Services](#)

- The user will then be presented with the current seven Balancing Services they can select from. To select the user checks the checkbox. A user can select all or one of the services.
- The user then selects the “Confirm Selection” button to proceed to the next step.

7.3. De-selecting Services to apply for pre-qualification for selected Unit.

- If the user makes an error or wishes to reverse the decision to not select a particular service, they can simply uncheck the tick box before proceeding to the next step. If a user decides to make this decision after proceeding with completing the Service ‘data capture’ sub-sections, this is also possible by unchecking the service checkbox and clicking the ‘confirm services’ button.

- The user must note that if they proceed to populate service specific information for more than one service for the same Unit, in several attempts or over a duration of time (i.e. they submit information for service x on day 1, but then go onto update the portal with additional submission of information for service x on day 3) that they can keep track of which service is still in flight (or 'draft') as opposed to 'submitted' by referencing the **'Service Status' field**. If the field value = Incomplete, then the submission for that service in example below *"Dynamic Containment LF"* has yet to be completed, and therefore will require the user to select the **'Confirm Services' button again**. This will ensure the secondary service submission has been accepted. If the Service Status Field = Submitted, then the application for that particular service, in the example below *"Dynamic Regulation HF"* has already been 'registered'.

Figure 42.1: Service Status Field

The figure consists of two screenshots from the nationalgridESO Unit Management portal. The top screenshot shows the 'Dynamic Containment LF' unit calibration form. The 'Service Status' dropdown menu is highlighted with a red box and is set to 'Incomplete'. The bottom screenshot shows the 'Select Services' screen for the unit 'Disney'. The 'Dynamic Regulation HF' service is selected, and the 'Confirm Services' button is highlighted with a red box. Below this, the 'Dynamic Regulation HF' unit calibration form is shown, with the 'Service Status' dropdown menu highlighted by a red box and set to 'Submitted'.

7.4. Completing Pre-qualification Criteria Sections by Service: Unit Calibration Section

- Each service selected will present the user with a series of sub-sections to complete with criteria specific fields. Each service is identified by the highlighted row illustrated in the figure below.
- The first subsection is entitled **Unit Calibration** and the user is expected to populate the corresponding fields. All the metric fields in this section are marked with a red asterisk and therefore **mandatory**. A user will not be able to proceed with the pre-qualification process without submitting information.

Figure 43.0: Services Specific Subsection – Unit Calibration

Select Services

Add the services you want for Hampshire Coast Renewables.

***Note - Please make sure you align assets to this unit before submitting for pre-qualification.

Dynamic Regulation HF Dynamic Regulation LF Dynamic Containment LF Dynamic Containment HF Dynamic Moderation LF Dynamic Moderation HF

Confirm Services

Dynamic Regulation HF

Save Draft

Unit Calibration

Complete the information to calibrate your unit.

*Allocated MW MW Recovery period min

*Response Time min Ramp-Up rate MW/min

*Max Utilisation Period min *Minimum Non Zero Time min

*Ramp-down rate MW/min

*Service Start Date *Service End Date

*Operational Metering available

Evidence

You must download the documents at the link below, sign them and upload them as part of your Unit evidence.

[Download required documents](#)

7.4.1. Obtain Service Values Feature

Figure 44.0: Obtain Service Values

Where a portal user has already made a prequalification for another service for the same Unit, they are able to 'copy' over the identical values from the existing application under the Unit Calibration Section over the new corresponding section under the new application by clicking 'Obtain Service Values' and selecting the Service for which they want to copy the pre-existing values over from and then selecting the Confirm button to complete the exercise.

Balancing Regulating Reserve

Unit Calibration Section

Complete the information to calibrate your unit.

*Allocated MW MW *Recovery period min

*Response Time min *Cease Time min

*Max Utilisation Period min *Minimum Non Zero Time min

*Ramp-Up rate *Ramp-down rate MW/min

*Service Start Date *Service End Date

Service Status Active Network Management

*Operational Metering available

Obtain Service Values

7.4.2. Obtain Service Values Feature

Obtain Unit Values

What Services do you want to obtain the asset information from?

Included Services

Cancel Confirm

of the organi

management

qualification application for example Terms & Condition Document.
 elected 'Save Draft' however a minimum of one piece of evidence is required in order to Save Draft.

7.5. Completing Pre-qualification: Attaching Supplementary Evidence

Figure 45.0: Services Specific Sub section

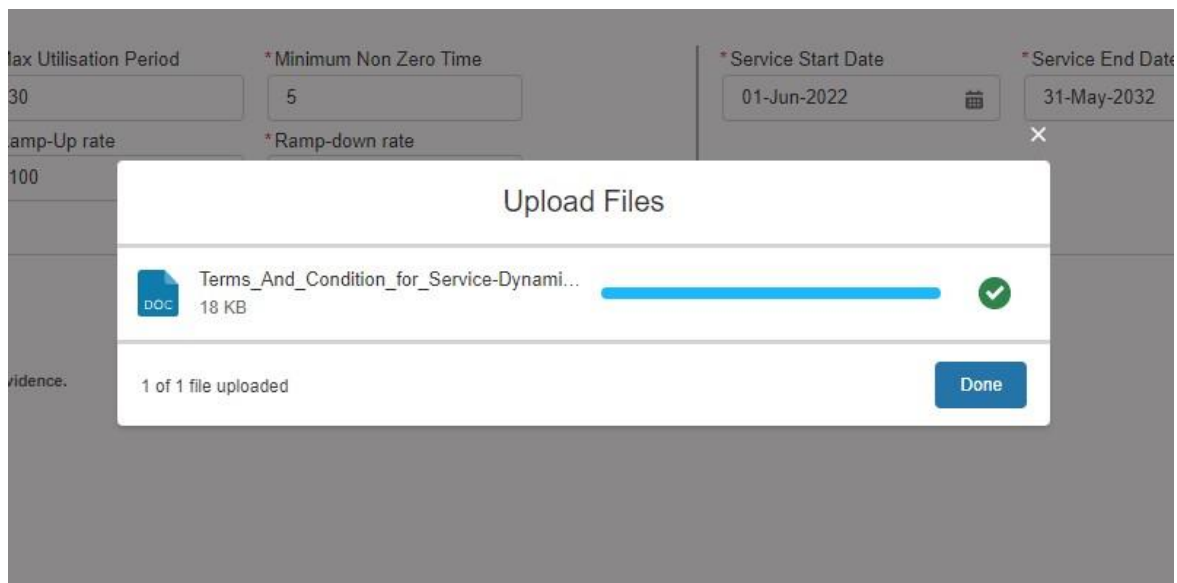


Once the Authorised Signatory is selected (this step is covered in the next section), the portal user is expected to upload any supporting evidence using the Upload Files button. Once selected the Portal User can upload files from their desktop etc and confirmation the documents or the zip file of multiple documents should highlight in blue with the 'Done' outcome.

Whilst this requirement applies to Frequency Response & RDP MW Dispatch Services yet it does not apply to Balancing Reserve or Demand Flexibility Service, it is however a mandatory system requirement that at least one document is uploaded to the portal to proceed with the submission process. With this in mind in the instance where no evidence is required to support the application, then it is advised that a 'placeholder' blank document is uploaded instead. This can be in any format (*Word, Jpg, png etc*)

7.6. Confirmation of Upload Completed

Figure 46.0: Services Specific Subsection



7.7. Manual Download of Form B (Terms & Conditions)

Please note that as of Release 2.2 all Services will have the ability for Portal Users to either access the Digital Signature functionality or continue to download a Template.

7.8. Completing Pre-qualification Criteria Sections by Service: Asset Testing Section

- The final sub-section to be completed requires gathering information on Asset Testing requirements for selected Service.
- As Figure 46.0 illustrates, each asset aligned to the Unit being considered will be listed and the corresponding asset testing data fields are expected to be populated by the user.
- Please note that whilst the fields are not marked with a red asterisk and therefore not currently designated as mandatory, a Unit cannot proceed with the pre-qualification request without the asset testing fields being completed.

Figure 47.0: Services Specific Asset Testing

The screenshot shows a section titled "Asset Testing" with a sub-header "2.Assets". Below this is a table with columns: Asset Name, Asset Id, Type, Capacity, Tested capacity, and Date approved by ITE. Two rows of data are shown, each with a red box highlighting the "Tested capacity" and "Date approved by ITE" input fields.

Asset Name	Asset Id	Type	Capacity	Tested capacity	Date approved by ITE
Roedean Wind Farm	AST-0173	Generation Unit Demand Unit		150	03-Jan-2022
Peacehaven Wind Farm	AST-0174	Demand Unit	60	150	03-Jan-2022

7.9. Completion of Pre-qualification Criteria: Terms & Conditions Section

- The step preceding final submission involves completing the Service Specific Terms & Conditions Checkboxes.
- To complete the Pre-qualification process, the user must click on the **'Save Draft'** button. This will appear in blue in its activated state on condition that all the prior subsections have been completed correctly. If it is in the shaded state, the user must revisit the subsections and ensure that the fields are populated and the evidence has been uploaded correctly. The user has the option to review the draft application at a later stage when they next login to the portal.
- When the user is ready to submit the Unit for pre-qualification application for approval, they then select the Submit button in Figure 48.0. In this instance, the NGESO Account Manager will be notified and undertake an internal appraisal of the application for the selected Unit and Service.
- To apply for additional Units for Pre-qualification, the user simply repeats the steps in Chapter 9 for each respective Unit.

Figure 48.0: Services Specific Terms and Conditions

The screenshot shows a web form titled "Terms & Conditions Section". Below the title is a paragraph of text: "The Terms & Conditions Document has now been dispatched electronically to your designated Authorised Signatory for E-Signature. Once signed, an email notification will be sent to you as confirmation and acknowledgement your pre-qualification application has been Submitted for Approval." Below this text are two checkboxes: "I have read the documents provided" and "I agree to the terms & conditions". At the bottom of the form are two buttons: "Save Draft" and "Submit".

8. Prequalification Application: Digitisation of Terms & Conditions (Form B)

10.1 Selecting Authorised Signatory & completing Application Submission

Following SMP Release 2.2a, Portal Users will have the option to either.

- a) Upload a Wet Signed Form B (Manual) with their Authorised Signatory's signature embedded in the Document.

OR

- b) Select up to 3 Designated Authorised Signatories to whom a digitised version of customised Form B will be sent to directly for electronic signature.

In order to select any of the three Authorised Signatories, a pre-requisite step is required whereby the named person must be registered by the applicant under the User section of the Portal and the 'Authorised Signatory' Role is selected against their name. To complete this step, please follow the instructions under the User Management Section/Chapter.

Once the person is registered, they will appear under the search box when entering their name or identifiable in the drop-down list of Users – to proceed simply enter the name or navigate to the name in question.

Please note that if a user is selected whom has not been assigned an Authorised Signatory Role then they will not be able to proceed with the application as an error message will appear prompting the user to revise the selection and ensure that all of the names selected are Authorised Signatories (see Figure 50.1 for error message).

The portal user (the applicant) will be expected to complete the task of entering the subsequent secondary and third authorised signatories where applicable. Please note that only a minimum of *1 Authorised Signatory is required to proceed with their application*.

The first authorised signatory will be sent the documentation to sign automatically to the signatory's email address. If the Authorised Signatory has failed to read and electronically sign the document after five consecutive days, then the second authorised signatory will be sent the documentation to sign. Finally, there has been no response from the second authorised signatory after five consecutive days, then the documentation will be sent to the third authorised signatory.

Alternatively, A portal user (applicant) can choose to download the Form B Template and arrange to have this signed in person and a scanned version uploaded instead by clicking the 'Download required documents' button. After signing these documents by hand, users will then have to scan the documents and upload them using the 'Upload evidence' section.

In order to click the 'Submit' button, the Portal User will have to either select at least one authorised signatory or upload a scanned copy of the hand-signed documents.

10.1 Selecting Authorised Signatory & completing Application Submission (Continued)

Correct selection of Authorised Signatory.

As an applicant the Portal User may select a secondary user who does not possess the Authorised Signatory Role, instead they may have chosen another secondary user inadvertently. In this instance, an error message will appear when the applicant selects Submit to notify them that an incorrect User has been selected as a designated Authorised Signatory.

Figure 50.0: Prequalification Screen – Authorised Signatory Section

Unit Calibration
Complete the information to calibrate your unit.

BMU / Non BMU ID
BMU-232

Allocated MW: 000.00 MW
Recovery period: min
Max Utilisation Period: min
Minimum Non Zero Time: min
Service Start Date: DD-MMM-YYYY
Service End Date: DD-MMM-YYYY
Operational Metering available: Yes

Response Time: min
Cease Time: min
Ramp-Up rate: 1
Ramp-down rate: 1
Service Status: Submitted

Evidence
You must download the documents at the link below, sign them and upload them as part of your Unit evidence.
If the application will be submitted using a Manual Template of Form B Terms & Conditions of Service, then please ensure you have downloaded the template by selecting the Download Button for completion. If the application will be submitted using a Digitised Version of Form B Terms & Conditions of Service, then please avoid the Download Button as this is not relevant and proceed with identifying your Authorised Signatories. If the application relates to BR or DF-S then please upload a blank document to accompany the prequalification for the service(s) in question as both these do not currently require any supplementary evidence.

Download required documents

Upload all the evidence for this Unit, including the required documents once signed
Upload evidence
Or drop files

Terms_And_Condition_for_Service-RDPMWDispatc h.docx
MW Dispatch Form C.pdf

Authorised Signatory
The Authorised Signatory is the person in your organisation who is authorised by the board of the organisation for authorising documentation on behalf of the organisation and responsible for signing the terms and conditions

First Authorised Signatory: Search
Second Authorised Signatory: Search
Third Authorised Signatory: Search

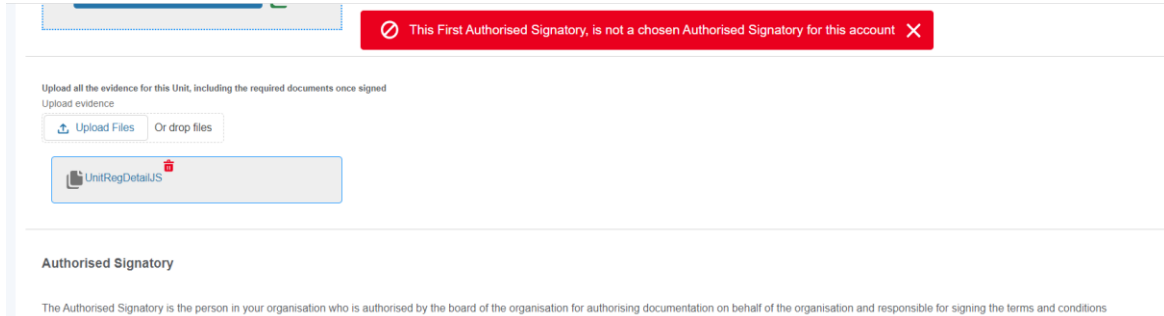
Terms & Conditions
The Terms & Conditions Document has now been dispatched electronically to your designated Authorised Signatory for E-Signature. Once signed, an email notification will be sent to you as confirmation and acknowledgement your pre-qualification application has been Submitted for Approval. In order to complete your application, you are required to navigate to the Service specific Terms & Conditions published on the website by clicking here and then confirming you have read the Service Terms & Conditions by checking the two checkboxes provided below.

I have read the documents provided.
 I agree to the terms & conditions.

Save Draft Submit

10.1 Selecting Authorised Signatory & completing Application Submission (Continued)

Figure 50.1: Error message if a User without the Authorised Signatory role is selected as one of the Authorised Signatories



The screenshot shows a web interface for uploading evidence. At the top, a red error banner reads: "This First Authorised Signatory, is not a chosen Authorised Signatory for this account". Below this, the user is prompted to "Upload all the evidence for this Unit, including the required documents once signed". There are two buttons: "Upload Files" and "Or drop files". A file named "UnitRegDetail.JS" is shown as uploaded. Below the upload section, there is a section titled "Authorised Signatory" with a definition: "The Authorised Signatory is the person in your organisation who is authorised by the board of the organisation for authorising documentation on behalf of the organisation and responsible for signing the terms and conditions".

10.2 Confirmation of Submission of Pre-qualification Application Request.

The final step required by the portal user is to check the checkboxes under the Terms & Conditions, when the Submit button will be made available to click. Upon clicking the Application considered 'finished' and awaiting the capture of the electronic signature by the authorised signatory – until the document is signed, the application is still in submit status and not complete and the application will remain in the 'signature in progress' state.

The Status Field will indicate the 'live' status of the application – therefore it will change from 'Incomplete' to 'Signature in Progress' to Submitted to eventually 'Approved' or 'Rejected' once appraised by the Contract Management Team.



The screenshot shows the "Terms & Conditions Section". It contains a paragraph: "The Terms & Conditions Document has now been dispatched electronically to your designated Authorised Signatory for E-Signature. Once signed, an email notification will be sent to you as confirmation and acknowledgement your pre-qualification application has been Submitted for Approval". Below this text are two checkboxes: "I have read the documents provided." and "I agree to the terms & conditions." Both checkboxes are currently unchecked. At the bottom right of this section are two buttons: "Save Draft" and "Submit".

Figure 51.0: Prequalification Screen – Application Status Field

10.1 Selecting Authorised Signatory & completing Application Submission (Continued)

Dynamic Moderation LF

Unit Calibration Section Obtain Service Values

Complete the information to calibrate your unit.

* Allocated MW 50	* Recovery period 30	* Max Utilisation Period 30	* Minimum Non Zero Time 5	* Service Start Date 19-Dec-2022	* Service End Date 30-Dec-2025	* Operational Metering available Yes
* Response Time 10	* Cease Time 10	* Ramp-Up rate 10	* Ramp-down rate 10	Service Status Submitted		

Asset Testing Section

1 Assets

Asset Name	Asset Id	Type	Demand Capacity	Generation Capacity	* Tested capacity	* Date approved by IFE
Sunflower Fields	AST-0167	Generation Unit Demand Unit	60	60	10	05-Dec-2022

Authorised Signatory

The Authorised Signatory is the person in your organisation who is authorised by the board of the organisation for authorising documentation on behalf of the organisation and responsible for signing the terms and conditions

Judy Garland x

Unit Calibration Section Obtain Service Values

Complete the information to calibrate your unit.

* Allocated MW 50	* Recovery period 30	* Max Utilisation Period 30	* Minimum Non Zero Time 5	* Service Start Date 19-Dec-2022	* Service End Date 30-Dec-2025	* Operational Metering available Yes
* Response Time 10	* Cease Time 10	* Ramp-Up rate 10	* Ramp-down rate 10	Service Status Signature in progress		

10.3 Automated Email Notifications

Upon submitting the prequalification application, the Authorised Signatory will receive an automated email instantly with a link to the electronic Form B, now customised with the Provider's details. The email will also contain National Grid ESO branding to make it clear to the recipient that the email is sent on behalf of ESO. The figure below illustrates the email template sent.

Figure 52.0: Email Template – 'Request to sign'

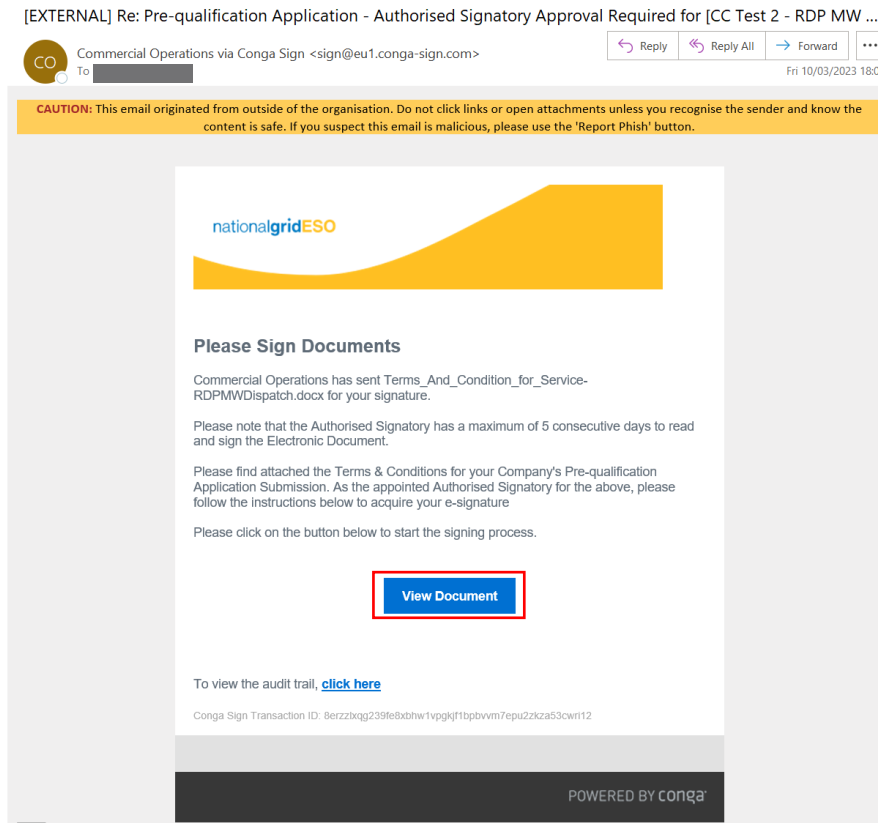


Figure 53.0: Email Template – 'Signing Complete'

The portal user (original applicant) will receive notification when their respective Authorised Signatory has completed signing. The figure below illustrates the email template sent.

10.3 Automated Email Notifications (Continued)

[EXTERNAL] Signing Complete for Terms_And_Condition_for_Service-RDPMWDispatch.docx



Commercial Operations via Conga Sign <sign@eu1.conga-sign.com>
To [REDACTED]

Reply Reply All Forward ...

Fri 10/03/2023 18:29

Terms_And_Condition_for_Service-RDPMWDispatch.pdf
138 KB

CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe. If you suspect this email is malicious, please use the 'Report Phish' button.

nationalgridESO

Signing Complete!

Terms_And_Condition_for_Service-RDPMWDispatch.docx is signed and completed. Click the button below or the attached PDF file to view and download the completed document.

[View Completed Document](#)

To view the audit trail, [click here](#)

Conga Sign Transaction ID: 8erzzxqg239fe8xbhw1vpgk1f1bpbvwm7epu2zka53cwri12

POWERED BY conga

10.4 Customisation of Digital Document & Electronic Signature Capture by Authorised Signatory

Figure 54.0: Opening the Customised Document (Form B)

The Authorised Signatory will be transported to the document which will contain the Name of the Service Provider and Company Registration Details as illustrated in the figure below. This data is extracted from the SMP Portal. The Signatory should read through and scroll the document to the Signature blue box in Figure 55.0 and double click on the blue box. If the Signatory decides to abort the process at this point, they can navigate to the top right-hand side and select 'Cancel Transaction'.

CONGA SIGN Sign Document

Page 1 of 3

Terms&Conditions.docx

Cancel Transaction Complete Signing

English

Terms & Conditions

BALANCING SERVICE: Dynamic Moderation LF

Name of Registered Service Provider: Rainbow Sprinkles Ltd

Country of incorporation:

Company number: 000000

Registered office:

Address for receipt of notices (if not R/O):

Agent (if acting on behalf of above Registered Service Provider)

Name:

Country of Incorporation:

Company number:

Registered office:

EITHER:

- DOWNLOAD THE DECLARATION AND ADHERENCE TEMPLATE (HERE) AND UPLOAD (HERE) DULY SIGNED AND DATED BY A DIRECTOR OR OTHER DULY AUTHORISED SIGNATORY

OR

- IF YOU ARE A DIRECTOR OR OTHER DULY AUTHORISED SIGNATORY, ATTACH YOUR ELECTRONIC SIGNATURE WHERE SHOWN BELOW AND CLICK SUBMIT

WHERE THE SIGNATORY IS NOT A DIRECTOR EVIDENCE IS REQUIRED OF AUTHORITY TO SIGN ON BEHALF OF THE REGISTERED SERVICE PROVIDER (OR AGENT, WHERE APPLICABLE)

DECLARATION

The above named Registered Service Provider (acting by its Agent where applicable) hereby

By clicking "I Agree", you agree that you have reviewed the Electronic Record and Signature Disclosure, and you consent to the use of electronic records and signatures in the review and execution of this document.

I Agree

Figure 55.0: Completing the Wet Signature step (Form B)

CONGA SIGN Sign Document

Page 2 of 3

Terms&Conditions.docx

Cancel Transaction Complete Signing

English

- undertakes to participate in the procurement by NGESO of the above mentioned **Balancing Service** only with respect to **Eligible Assets** of which it is at all relevant times the legal owner or the entity with operational responsibility (which shall, for the avoidance of doubt, include despatch control);
- undertakes to promptly update the registration details provided to NGESO as and when the same may change; and
- undertakes to procure all necessary despatch controls, metering and monitoring facilities (as the case may be) as stipulated by the above service terms.

Furthermore, by signing and submitting this form, the above named **Registered Service Provider** agrees and acknowledges that:

- it has read and understands the terms of the above documentation, and has taken independent legal advice in relation thereto; and
- neither the submission of this form nor NGESO's subsequent acknowledgement and confirmation of its registration as a **Registered Service Participant** creates any legally binding obligation or commitment for the provision of, and payment for, any **Balancing Service**, which shall arise only in accordance with the terms of the above documentation.

NOTE: all terms shown in bold on this form have the meanings given in the above documentation.

Authorised Signatory of Registered Service Provider or Agent

Signed: X Signature

Name: Judy Garland

Date: December 7, 2022

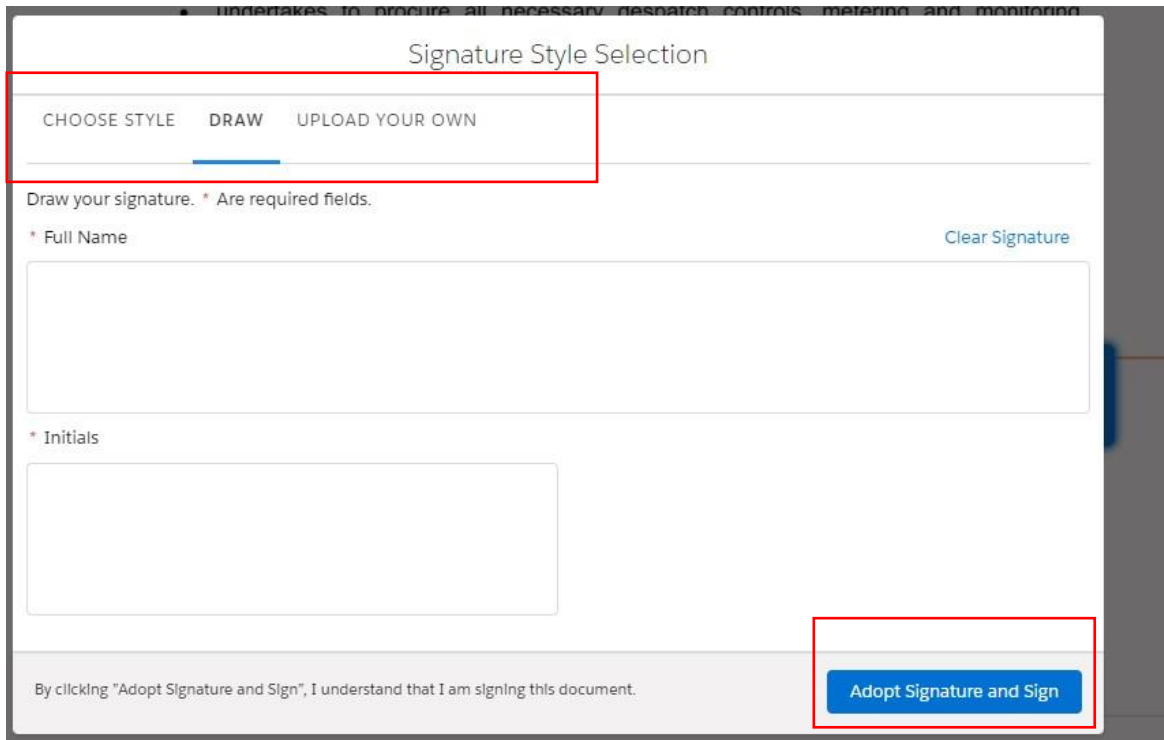
If the signatory is not a director, please upload (HERE) evidence of authority to sign on behalf of the Registered Service Provider (or Agent where applicable)

[UPLOAD]

Figure 56.0: Capturing the Wet Signature step (Form B)

The signer can select a number of methods to capture their signature as indicated in the tabular options in the figure below.

10.4 Customisation of Digital Document & Electronic Signature Capture by Authorised Signatory (Continued)



Signature Style Selection

CHOOSE STYLE DRAW UPLOAD YOUR OWN

Draw your signature. * Are required fields.

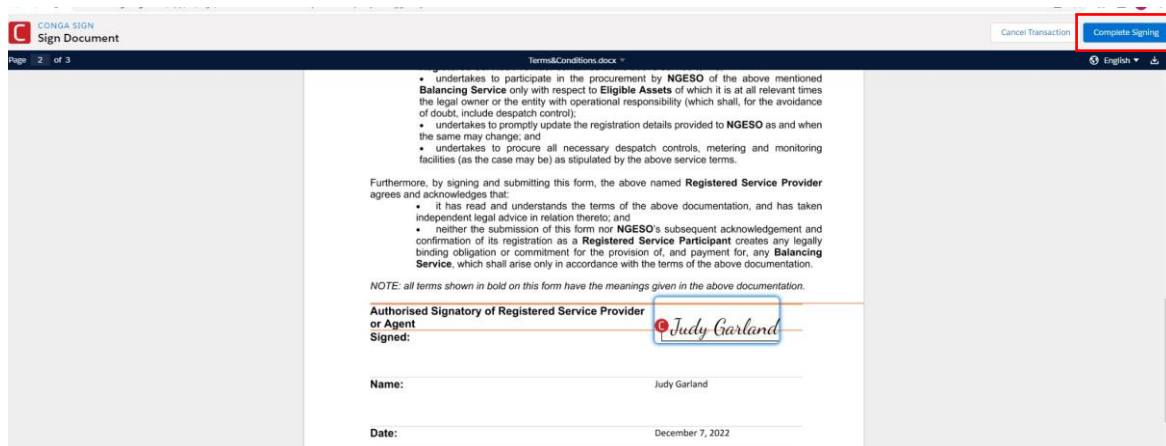
* Full Name Clear Signature

* Initials

By clicking "Adopt Signature and Sign", I understand that I am signing this document.

Adopt Signature and Sign

Upon capturing the signature, the signer should navigate to the 'Adopt Signature and Sign' custom button on the bottom right-hand side. Once finished, the signature will appear embedded in the document under 'Signed' section alongside the printed name and the Date the signature was captured. The signer should complete the process by selecting 'Complete Signing' on the top hand side of the document by scrolling to the top of the screen.



CONGA SIGN
Sign Document

Terms&Conditions.docx

Page 2 of 3

English

- undertakes to participate in the procurement by NGESO of the above mentioned **Balancing Service** only with respect to **Eligible Assets** of which it is at all relevant times the legal owner or the entity with operational responsibility (which shall, for the avoidance of doubt, include despatch control);
- undertakes to promptly update the registration details provided to NGESO as and when the same may change; and
- undertakes to procure all necessary despatch controls, metering and monitoring facilities (as the case may be) as stipulated by the above service terms.

Furthermore, by signing and submitting this form, the above named **Registered Service Provider** agrees and acknowledges that:

- it has read and understands the terms of the above documentation, and has taken independent legal advice in relation thereto; and
- neither the submission of this form nor NGESO's subsequent acknowledgement and confirmation of its registration as a **Registered Service Participant** creates any legally binding obligation or commitment for the provision of, and payment for, any **Balancing Service**, which shall arise only in accordance with the terms of the above documentation.

NOTE: all terms shown in bold on this form have the meanings given in the above documentation.

Authorised Signatory of Registered Service Provider or Agent
Signed: Judy Garland

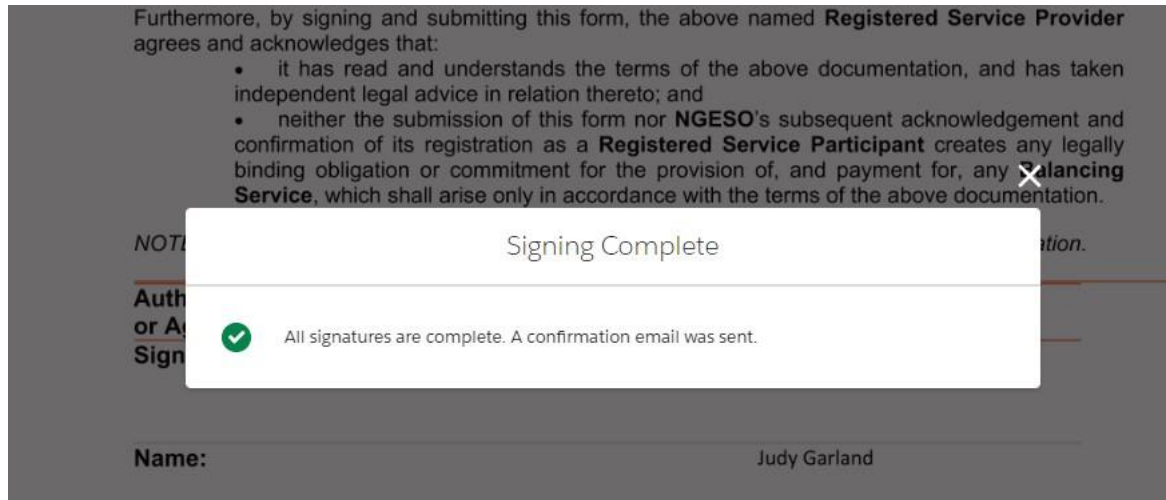
Name: Judy Garland

Date: December 7, 2022

Cancel Transaction Complete Signing

10.5 Confirmation of Signing Process - Complete

Figure 57.0: Document completed.



A notification will appear on screen, followed by the second automatically generated email notification sent to the portal user (applicant) to acknowledge receipt of the completed Form B Template Document. This document will be uploaded to the portal under the Prequalification Screen under the relevant Service application and made available to Contract Managers internally to accompany the respective Pre-qualification application.

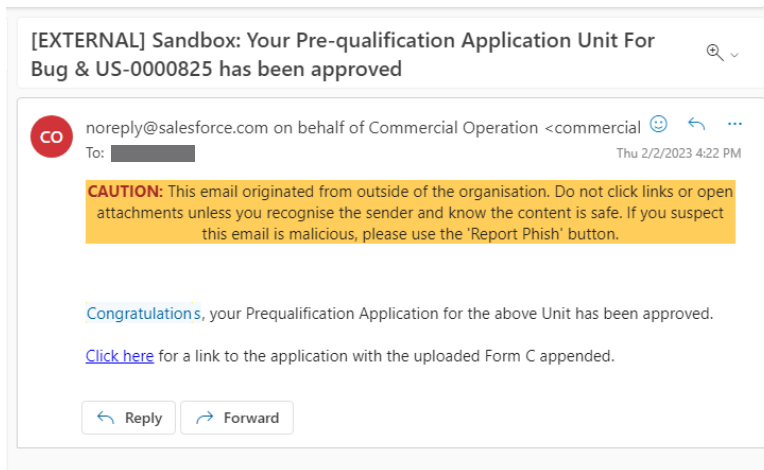
10.6 Pre-qualification Process Application Closure:

The internal approval document known as Form C will be appended and available for the applicant (portal user) to access once the internal prequalification appraisal process has been undertaken internally (see Figure 58.0). The Status field will also be changed to 'Approved' when the Form C is attached.

Figure 58.0: Uploaded Form C



Figure 58.1: Pre-qualification Application Approval Email



Global Versioning

11.1 What is Global Versioning?

The term Global Versioning refers to the process whereby a Market Provider can modify or alter the Unit, the Unit's composition of Asset(s) and the re-evaluation of any existing prequalification applications to ensure their continued eligibility to participate in the services it had originally been qualified for.

The process has been designed to be more streamlined so that all prospective modifications and/or alterations are captured in one instance from Market Providers and any tests or conditions are applied in real time and the outcome is calculated instantly where possible and the subsequent changes are applied to the Unit automatically.

The Global Versioning Process comprises of the following stages;

- The identification of the Unit in question and the capture of information relating to the Unit and associated asset(s) and updates to the connected prequalification applications.
- The verification of the data supplied in line with Versioning Criteria and the outcome decision on the modifications/alteration.
- The automated processing of the Unit to generate the latest Unit Version and the associated records to reflect the latest changes/alterations.
- The communication of the latest Unit Version and associated records to downstream systems such as the EAC platform.

8.1. Changes permitted through Global Versioning

As of Release 2.12 Global Versioning permits the following modifications or alterations to be made.

A Unit is subject to versioning when it requires a change or modification to its properties or to a change or modification to its composition of asset(s). This can include any of the following combination.

- An Increase or Decrease in the Total Demand or Generation Capacity resulting from an alteration in the composition of asset(s)
- The addition or remove/withdrawal of asset(s)
- A Modification to the Demand or Generation Capacity at an individual Asset Level.

A Unit and its connected Asset(s) can be subject to multiple iterations of Global Versioning during its lifetime. For example, a Unit can require several changes over time and each change will constitute a case for Versioning – therefore one Unit within a provider’s portfolio may have 1 Version whilst another may have 10 more.

Please note that as of Release 2.12 a ‘*standalone*’ asset is not eligible for Global Versioning after it has been registered. Only asset(s) that are committed to a Unit at the point of embarking on Global Versioning are eligible to be ‘modified’.

8.2. Changes not permitted through Global Versioning

Please note that as of Release 2.12 any other ‘Parameter’ on the Unit or the corresponding Asset outside of the Demand and/or Generation Capacity is not eligible for Global Versioning, meaning any modifications to such parameter values will require the Market Provider to liaise with the Account Manager to establish if modifications can be made to registered Units and Assets.

11.2 Why is Global Versioning required?

The main rationale for introducing Global Versioning on the SMP Portal is to keep track of changes of a Unit & a *connected* Asset over time which are documented and available for the Registrations & Contracts Team to monitor for auditing purposes as well as recording the history of a Unit and an Asset as it evolves or changes during its lifetime. Essentially, when changes are made to the Unit, its composition of Assets or the individual Assets, a cloned copy of the original record is produced with the original retaining its original properties, allowing a new version (cloned) to be subject to modifications or updates by the Portal User(s).

Moreover, ‘related’ or supplementary records linked to the Unit will also be cloned automatically. For example, if the origin Unit has a pre-qualification ‘application’ attached, the application record will also be cloned – critically retaining the Status at the point of Versioning. Equally all corresponding Asset Testing Data and Supplementary Evidence pegged to the original application will be tagged against the latest version of the Unit automatically. It is important to note that if the Unit satisfies particular “Service Criteria” or conditions then as a result of the modifications made by the Portal User, then additional information or evidence will be required to support the modification request.

It is important to note that with the introduction of User Roles, all Unit and Asset Records including those Versioned will be available to view and edit or manage exclusively by User(s) with the ‘Unit Manager’ Role assigned to their User Record/Profile by their respective Super User. For more on User Roles please visit the Chapter on User Management. Moreover, it is recommended that only one user at any one time is solely responsible for undertaking the task of Versioning a Unit.

For the purposes of the Guide, the naming convention will run as follows; the origin Unit and Asset will be referred to as Version 1.0 and the second iteration of the Unit and Asset

will be referred to as Version 2.0. Any subsequent iterations will follow the same logic, so a third version will be referred to as 3.0.

11.3 What types of Global Versioning apply to Units?

There are currently two different types or instances of Global Versioning. These are as follows;

<p>Manual Versioning</p>	<p>If the alterations to (or the composition of) assets connected to the Unit in question result in a total increase in either/both Demand and Generation Capacity, then the Unit will require appraisal by the Registrations Team before approval.</p> <p>Any associated <i>impacts</i> on the Service Criteria for <i>all or any</i> of the Services the Unit is already approved to participate in will be evaluated and an outcome determined automatically.</p> <p>Any associated existing prequalification post evaluation deemed ineligible will be classified as 'Rejected' automatically with an external notification sent to Portal Users associated with the Market Provider to notify them of the outcome decision <i>at the point the Global Versioning Application 'Form' has been completed but whilst the Unit is pending manual appraisal</i>.</p> <p>A Unit subject to Manual Versioning cannot complete the Global Versioning Process until the Unit has been approved by the Registrations Team despite the connected pre-qualifications re-evaluated automatically and deemed eligible or ineligible to continue.</p>
<p>Automated Versioning</p>	<p>If the alterations to (or the composition of) assets connected to the Unit in question result in a total decrease in either/both Demand and Generation Capacity, then the Unit will not require appraisal by the Registrations Team, instead it will be granted automatic approval.</p> <p>Any associated <i>impacts</i> on the Service Criteria for <i>all or any</i> of the Services the Unit is already approved to participate in will be evaluated and an outcome determined automatically.</p> <p>Any associated existing prequalification post evaluation deemed ineligible will be classified as 'Rejected' automatically with an external notification sent to Portal Users associated with the Market Provider to notify them of the outcome decision <i>at the point the Global Versioning Application 'Form' has been completed but whilst the Unit is pending manual appraisal</i>.</p> <p>A Unit subject to Automated Versioning is able to complete the Global Versioning Process as it has been classified as 'approved' (Accepted) automatically, independently of the connected pre-qualifications which are also re-evaluated simultaneously and deemed eligible or ineligible to continue.</p>

8.3. Conditions for Re-evaluating Prequalification Applications

Existing Prequalification applications subject to re-evaluation as part of Global Versioning will be in 'Approved' Status and the following key conditions are applied as part of the re-evaluation conditions to determine if the Unit remains eligible or is deemed ineligible.

- Where either a total increase or reduction in Generation and/or Demand Capacity results in **drop below The Service Minimum threshold (SMT)**.
- Where the total increase or reduction in Generation and/or Demand Capacity results in a **drop below, the adjusted/revised Allocated Volume is then checked against the SMT** for the specified Service.
- Where the **adjusted/revised Allocated Volume has also dropped below the SMT then the Unit is deemed ineligible to continue to participate in the service when the latest version of the Unit takes effect.**
- If the total increase or reduction in Generation and/or Demand Capacity results **does not result in a drop below The Service Minimum threshold (SMT) then the Unit is eligible to continue to participate in the service in question.**

***The SMT** is defined as the baseline Generation and/or Demand capacity volume a Unit is expected to deliver for the respective Service. Each Service will have a universal 'constant' threshold figure determined as part of the original specification by the ESO when a service is devised.

Global Versioning Process Steps

8.4. Selection of 'Primary' Unit.

To initiate the GV process, you will be required to firstly identify the 'Primary' Unit that you wish to submit for Global Versioning. Please note the following;

1. Only Units in 'Accepted' Status can qualify for GV
2. A Unit must have at least one Asset 'aligned' to it.

The Portal User must navigate to the Change Request Tab on the Unit Management Landing Page and then select 'Add Basket for Versioning' custom button.

The screenshot shows the 'Unit Management' interface with the 'Change request' tab selected. A search bar is present with the text 'Search unit name'. Below the search bar, it indicates '4 unit(s)'. A unit detail card for 'EV Test Unit' is displayed, showing its status as 'Accepted', Unit Id 'AG-09F', Applicable Market 'Balancing Services', Type 'Generation Unit;Demand Unit', Generation Capacity '10', Demand Capacity '10', and Assets '1'. The 'Accepted' status and the '1' under Assets are highlighted with green boxes.

The screenshot shows the 'Unit Management' interface with the 'Change request' tab selected. A notification bar at the top states: 'If you want to create the UNIT for RDP MIV Dispatch, Please register a new Asset and the UNIT will be created automatically.' Below the notification, it indicates '1 baskets'. A basket entry is shown with the ID 'CL-000000011', Total Units '1', Effective From Date '25/12/2026', and Processing Date '09/11/2023'. A 'Validate basket' button with a green checkmark is visible. A red box highlights the 'Add baskets for versioning' button at the bottom.

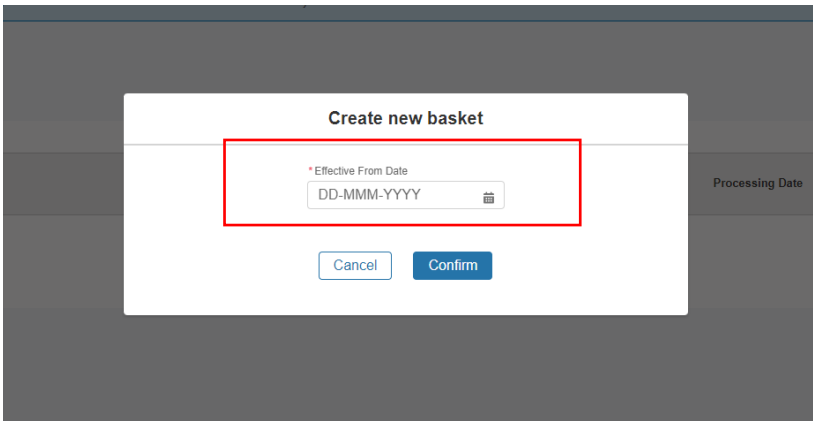
8.5. Creation of Global Versioning Basket – Basket Rules

Global Versioning uses the concept of Baskets to contain all of the Units that are subject to changes. The Basket 'Rules' are as follows;

- A Basket can contain one or more Units. These can be 'Primary' or 'Impacted' Units.
- *Primary Units* are those selected by the Market Provider
- *Impacted Units* are those Units identified as sharing at least one or more common assets as part of the composition of assets. Modifications made to the common asset will result in subsequent changes to other Units by virtue of the asset(s) being shared. These Units will be identified automatically and 'pulled' into the same Basket for the Portal User to preview and either approve or make further changes if required.
- All Units within a given Basket must share a Universal Basket '*Effective From Date*' This Date is when the latest Version of the Unit will take effect. This date can be amended with future alternative dates.
- Each Basket also has a 'Basket Processing Date'. This Date is calculated automatically and is currently used as a 'cut-off' date for committing the proposed changes (captured in the GV Application Form for each individual Unit) to be 'executed'. This Date is currently 10 days from the *Effective From Date*. The 10 day period allows for any ESO Approval or Intervention to be undertaken. *If the Effective From Date is adjusted by the Portal User, then the Processing Date is adjusted automatically.*
- A Basket can only be ready for processing when the following conditions are met;
 1. The Processing Date has been reached or lapsed.
 2. Every Unit in the Basket has a **completed** Application Form.
 3. All Units in the Basket (**Primary and Impacted**) have been marked as '**Eligible**' in the Eligibility Outcome Status.
 4. The User has submitted the Basket for final Validation (and the Validation Tests have passed)
 5. The User has selected the '**Process Basket**' Link contained within the Basket.

8.6. Creation of Global Versioning Basket – Basket Steps

When the Portal User selects the Create New Basket, they will be prompted to set the Effective From Date entering a specific format of *DD-MM-YYYY*. To proceed, select 'Confirm'.



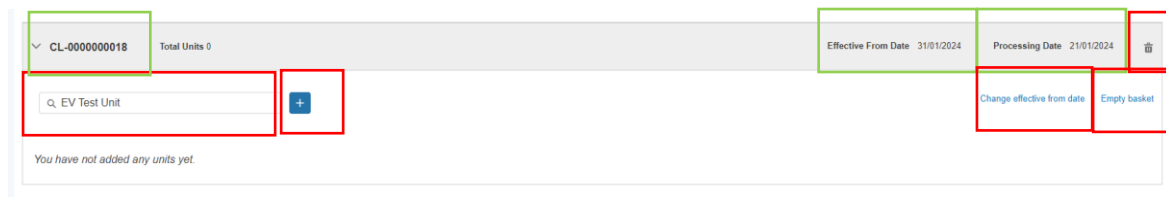
The screenshot shows a modal dialog titled "Create new basket". Inside the dialog, there is a text input field for "Effective From Date" with a calendar icon to its right. The input field contains the placeholder text "DD-MM-YYYY". A red rectangular box highlights this input field. Below the input field, there are two buttons: "Cancel" and "Confirm". To the right of the dialog, the text "Processing Date" is visible.

8.7. Creation of Global Versioning Basket – Selection of the ‘Primary’ Unit.

When the Basket is created, the Portal User will be prompted to select the Unit by entering the Name in the Search Box and then pressing the ‘+’ button adjacent to it. If the Unit is found, it will instantly be added to the Basket and appear as a ‘line item’.

The Basket Reference Number will always use the prefix CL-‘00000000’. If any Units fail the Validation Tests, the internal teams can use this reference to locate the corresponding Error Logs.

A Basket can be deleted at any stage prior to ‘Basket Committal’ (as outlined in the conditions overleaf). Once deleted all the Units contained within the Basket and any associated Versioning Application Forms will also be ‘deleted’.



Once selected the Unit will appear as illustrated below. The Line Item entry will contain the **headline data** for each Unit and will display the ‘before’ and ‘after’ the modifications or alterations have been made by way of completion of the Versioning Application Form for the Unit in question.

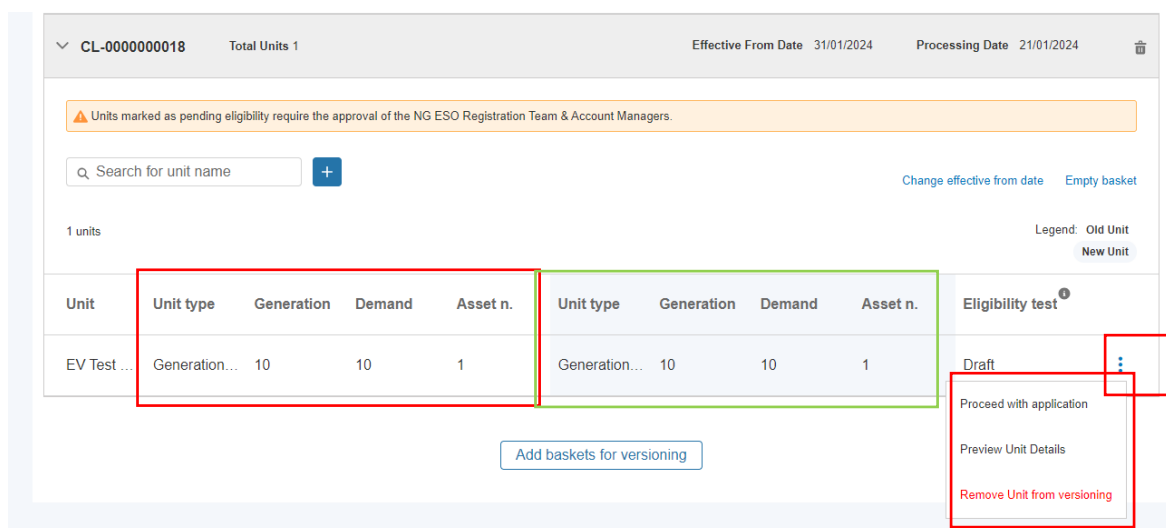
The ‘after’ columns shaded in Grey will be updated in real time upon completion of the Versioning Application Form with the latest updated parameters.

At the point a Unit is added to the Basket, the Eligibility Test Outcome Status will automatically be set to ‘Draft’. The next step is to complete the application form. To do this, the portal user will need to navigate to the three *drop down buttons* and select the option ‘**Proceed with application**’

The option ‘**Preview Unit Details**’ will enable the Portal User to review the existing Unit’s ‘data’ and current parameter values.

The option to ‘**Remove Unit from Versioning**’ allows the Portal User to withdraw the Unit from the Basket completely.

The option to ‘Cancel’ an individual Versioning Application Form once ‘started’ is available throughout by selecting the option ‘**Cancel Versioning**’ which is located on the bottom left hand side of the ‘Application Form’ Screens.



8.8. Completion of Global Versioning Application Form

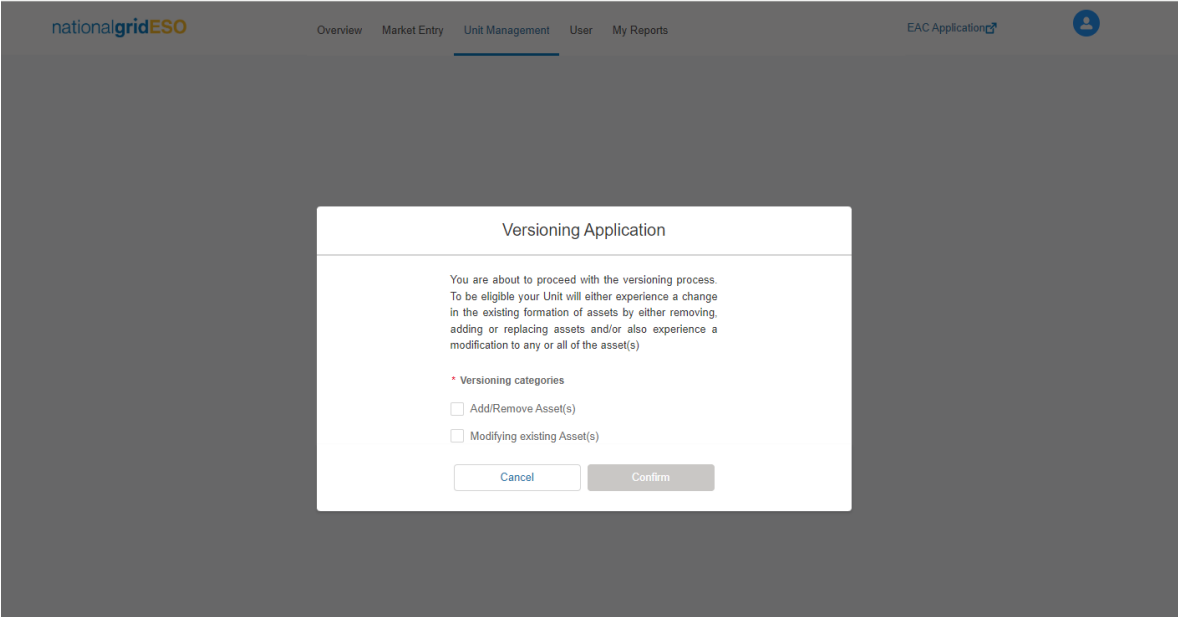
By completing the Global Versioning Application Form you are able to notify us of;

- Any alteration to the composition of the **primary** asset(s)
- Any modification to **primary** individual asset(s)
- Both alteration the composition of the **primary** asset(s) & the modification to any individual **primary** asset(s)

8.8.1. Step 1: Selecting the action type

The Form allows the Portal User to capture changes resulting from either Adding/Removing Asset's and/or also modifications to existing Asset(s) within the same Form. These are labelled as 'Versioning Categories'.

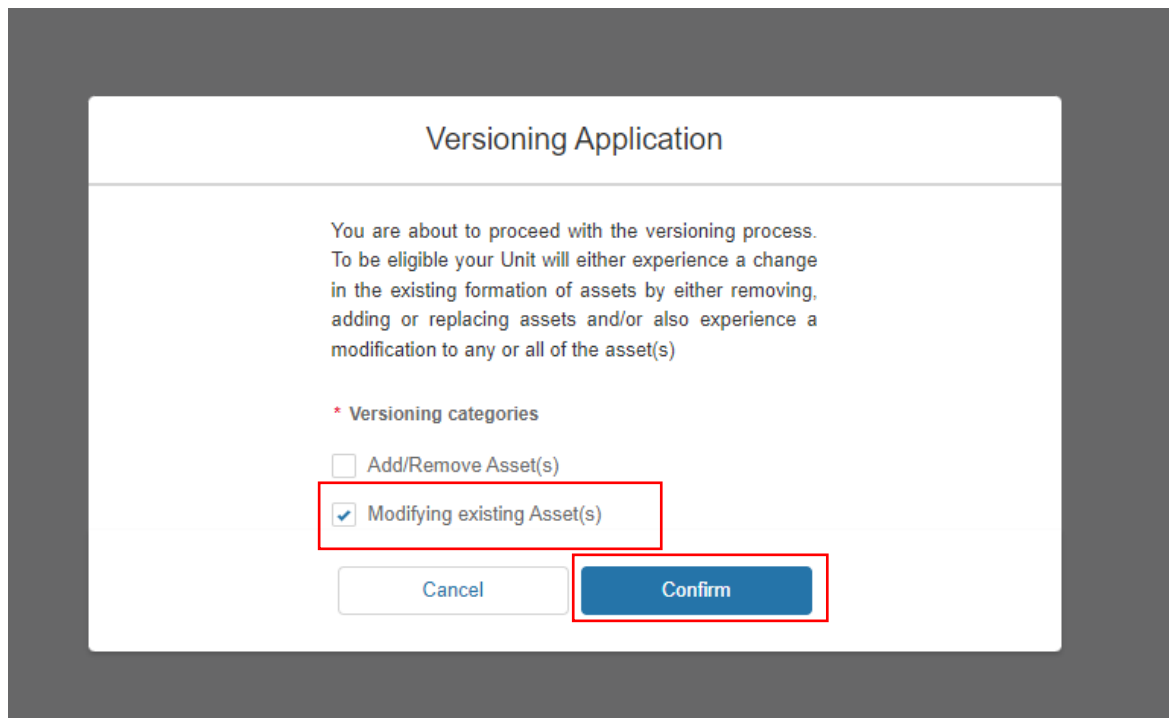
Once the category options are selected, the Portal User is able to proceed with the Form by pressing 'Confirm'.



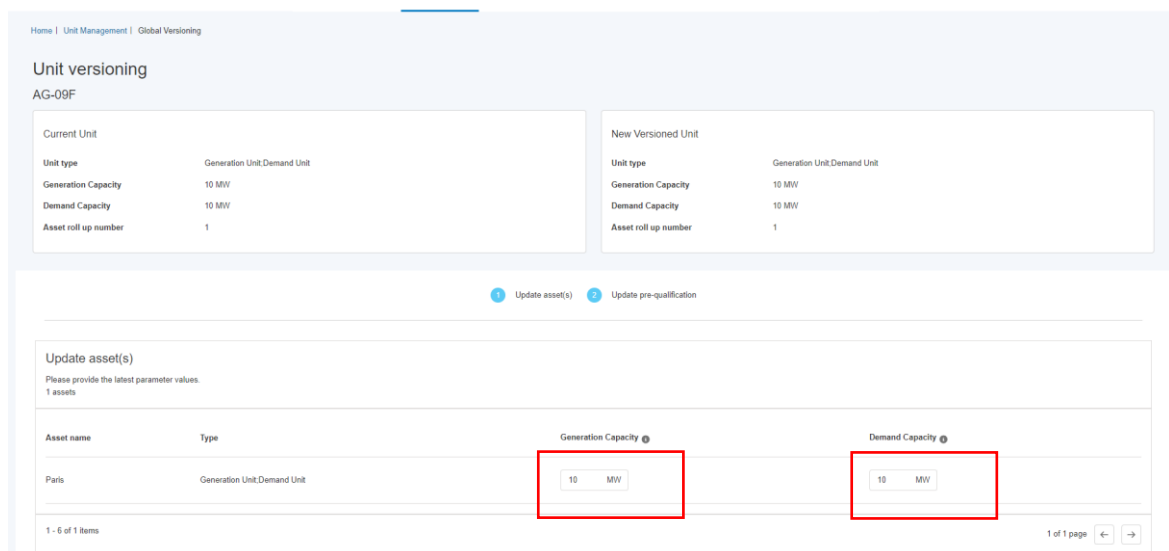
The screenshot shows a web application interface for 'nationalgridESO'. The top navigation bar includes 'Overview', 'Market Entry', 'Unit Management', 'User', and 'My Reports'. A user profile icon is visible in the top right corner. The main content area displays a 'Versioning Application' dialog box. The dialog box contains the following text: 'You are about to proceed with the versioning process. To be eligible your Unit will either experience a change in the existing formation of assets by either removing, adding or replacing assets and/or also experience a modification to any or all of the asset(s)'. Below this text, there is a section titled '* Versioning categories' with two radio button options: 'Add/Remove Asset(s)' and 'Modifying existing Asset(s)'. At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Confirm'.

8.8.2. Step 2.a: Use Case 1: Modifying Asset(s) exclusively.- Increase in Total Capacity.

This example will cover the instance where only one more Asset(s) that compose the Unit require a modification to the Demand and/or Generation Capacity.



This next section in the Form will prompt the Portal User to provide the revised/latest Values for the Demand and/or Generation Capacity. Once entered, to proceed to the next section, the portal user will be prompted to select 'next' on the bottom right hand screen.



8.8.3. Step 2.b: Use Case 1: Modifying Asset(s) exclusively: Re-evaluation of existing Prequalification Application Data

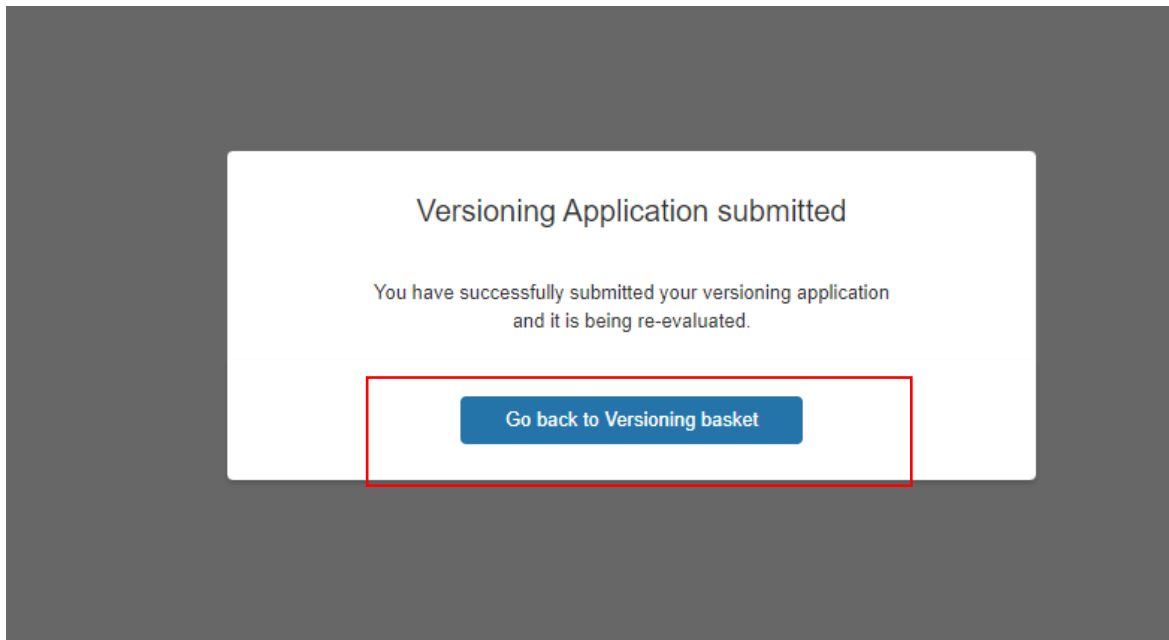
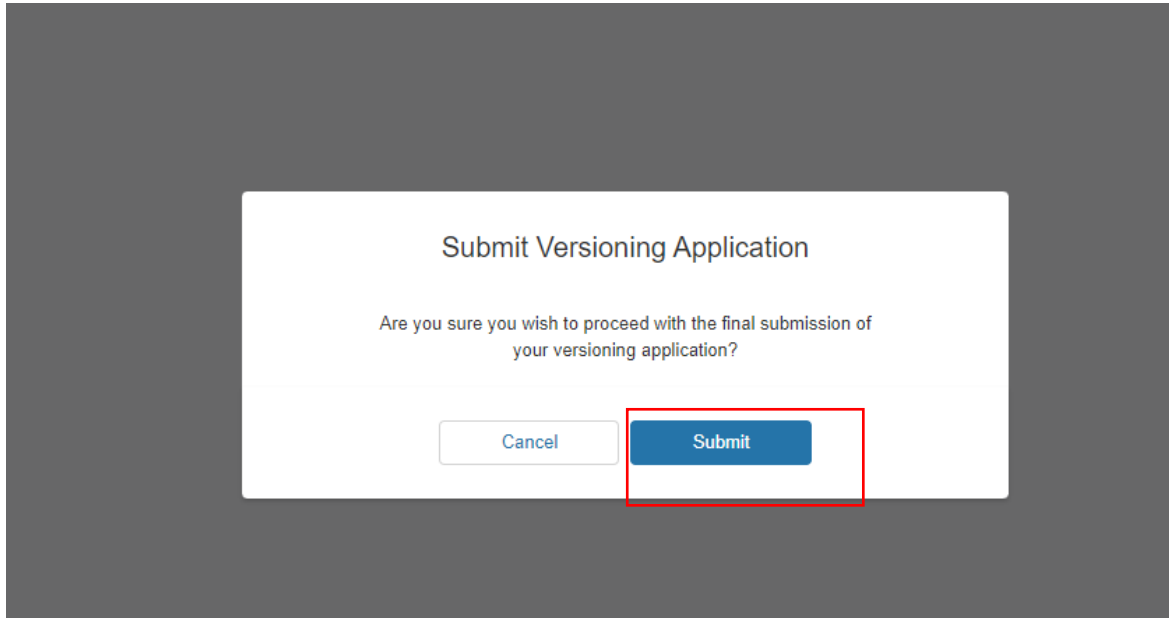
Where the Total Capacity has increased at the Unit Level, the system will detect that any existing Prequalification Applications in Approved State will require attention. An orange banner with yellow warning will appear on this section of the form, providing the portal user the opportunity to update the relevant pre-qual application.

- The Portal User will be prompted to update or 're-affirm' the Prequalification Parameters for any associated Prequalification applications that were previously approved.
- The mandatory field value is the *Allocated Volume*; however it is expected at this point of the application form to also included the Tested Capacity Volume.
- Currently as of Release 2.12, a revised ITE Certificate and a Date of said revised ITE Certificate is not mandatory for existing asset(s)..

The screenshot displays the 'Update pre-qualification' form. At the top, there are two progress indicators: 'Update asset(s)' (checked) and 'Update pre-qualification' (active). Below this, the form title 'Update pre-qualification' is followed by the instruction 'Please provide the latest parameter values and supplementary evidence as required.' A red box highlights an orange warning banner that reads: 'Following the re-evaluation tests, the Unit connected with this existing prequalification requires revised parameter values.' Below the banner, the 'Unit calibration' section is visible, with a sub-header 'Complete the information to calibrate your unit.' This section contains several fields: 'Service status' (incomplete), 'Service Start Date' (2022-02-01), 'Service End Date' (2032-02-01), 'BMU/Non-BMU ID' (AG-09F), '* Allocated Volume' (10 MW), 'Response time' (10), 'Cease Time' (10), 'Recovery Period' (10), 'Max Utilisation Period' (10), 'Minimum Non Zero Time' (10), 'Ramp-Up rate' (10), 'Ramp-down rate' (10), and 'Operational Metering available' (Yes). At the bottom, the 'ITE Certificate' section includes an 'Upload Files' button, an 'Or drop files' option, and a 'Date approved by ITE' field with the value '13-Nov-2023'.

8.8.4. Step 3: Use Case 1: Modifying Asset(s) exclusively: Submission of the Versioning Application Form.

To mark the completion of the Versioning Application Form for an individual Unit, the Portal User will be presented with two subsequent 'pop-up' notification screens as illustrated below. To proceed, click on the 'Submit' followed by the 'Go back to the Versioning Basket' Screen to navigate to the 'Change' Request' Page and the Basket.



Trigger of Manual Versioning Conditions

In the Use Case example where the origin Primary Unit has increased in its total capacity, the Unit will be treated as follows;

- The Eligibility Test Outcome will be classified as **'In Review'** in the Basket
- Any impacted Units that share the Asset in common will appear under the 'Impacted' Units Tab. **These Units will also be classified as 'In Draft' in the Basket**
- The Cumulative Value for the Demand and/or Generation Capacity Field will be updated in the 'Grey' Shaded columns (New Unit)
- The ESO Business Units will be expected to appraise the Units (*Both Primary and Impacted*) to approve the changes. Once done, the **Eligibility Test Outcome** will change to **'Eligible'** unless upon final Validation checks, errors in the associated Unit or Asset(s) have been identified that need resolving in which case the status will change to **'Partially Eligible'**.

CL-000000018 Total Units 1 Effective From Date 31/01/2024 Processing Date 21/01/2024

Units marked as pending eligibility require the approval of the NG ESO Registration Team & Account Managers.

Search for unit name + Change effective from date Empty basket

1 units Legend: Old Unit New Unit

Unit	Unit type	Generation	Demand	Asset n.	Unit type	Generation	Demand	Asset n.	Eligibility test
EV Test Unit	Generation Unit,...	10	10	1	Generation Unit,...	20	20	1	In Review

8.9. Submission of Basket– Validate Basket Step

Once all the Units in the Basket have been classified as ‘Eligible’, the Portal User can proceed with subjecting the Basket for ‘Validation’ by clicking on the ‘Validate Basket’ button on the top right hand corner.

- Validation means that a final check on the individual Data (fields/parameter values) on all associated records do not incur any errors or missing data prior to committing the Unit to the completion of the Versioning Process. The **Validate Basket Button** can be selected prior to the Processing Date and can be selected on successive attempts -if Validation of the Basket fails the first time. A message will appear to confirm Validation is in progress. Simply refresh the page & navigate to the ‘Change Request’ Landing Page.
- The outcome of the Validation Tests is instant; however a notification is only sent out to the ESO Internal Teams to as they are in a position to investigate and resolve the root causes of the Validation Error. They will arrange to liaise with Market Providers/Portal Users to ensure the Errors are dealt with accordingly. **The Eligibility Test Outcome for the respective Unit will appear as ‘Partially Eligible’ in the Basket.**
- Once this exercise is complete, the Portal User will be prompted to repeat the task of selecting the Validate Basket Button in order to achieve a successful Validation Test result in order to prime the basket for processing. When the Validation errors have been resolved, the **Eligibility Test Outcome for the respective Unit will appear as ‘Eligible’ in the Basket.**

8.10. Submission of Basket– Committal of Basket for processing

Once the conditions for Processing the Basket have been met as stated earlier in the guide, then a ‘Green Banner’ will appear at the top of the Basket and embedded in the text is a hyperlink to allow the Portal User to proceed with ‘Process Basket’ and commit the changes, completing the Global Versioning Process.

8.11. Completion of Global Versioning Process

When Processing is complete, a 'Unit Tile' is instantly created for the latest Version of the Unit (Version 2.0) and adjacent to it will be the predecessor Version (V1.0).

The Unit 'Versions' are distinguishable by the Status 'Value'. Version 2.0 (the most recent will display as '**Accepted**' and the predecessor Version 1.0 will display as '**Versioned**'. The Unit Tile marked **Versioned** will not be available to make any further edits or for example submit any prequalification applications under.

The screenshot shows the 'Unit Management' interface. At the top, there is a navigation bar with 'Units', 'Assets', and 'Change request' tabs. Below this is a search bar labeled 'Search unit name'. A message box states: 'If you want to create the UNIT for RDP MV Dispatch, Please register a new Asset and the UNIT will be created automatically.' Below the search bar, it indicates '5 unit(s)'. Two unit tiles are displayed side-by-side, both for 'EV Test Unit' with ID 'AG-09F'. The left tile is marked 'Accepted' with a green dot, and the right tile is marked 'Versioned' with an orange dot. Both tiles show the same specifications: Applicable Market: Balancing Services; Type: Generation Unit; Demand Unit; Generation Capacity: 20; Demand Capacity: 20; Assets: 1.

Unit Id	AG-09F
Applicable Market	Balancing Services
Type	Generation Unit; Demand Unit
Generation Capacity	20
Demand Capacity	20
Assets	1

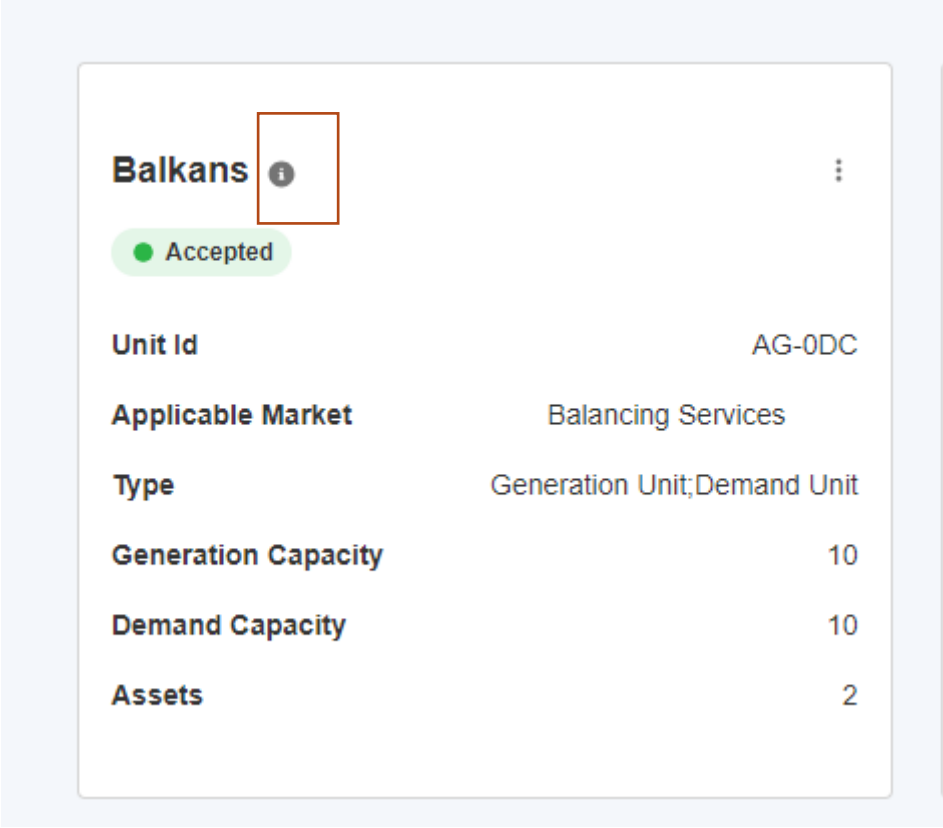
Unit Id	AG-09F
Applicable Market	Balancing Services
Type	Generation Unit; Demand Unit
Generation Capacity	10
Demand Capacity	10
Assets	1

8.12. Limitations whilst Global Versioning Process is 'In-flight'.

Once a Unit has been subject to Global Versioning, there are several limitations in place to prevent any further activity from occurring whilst the Global Versioning Process is in flight.

- Portal User **are unable** to modify or make repeated changes to the same Unit or any implicated Assets after Global Versioning has been initiated.
- Portal User **are unable** to prequalify the Unit for new services after Global Versioning has been initiated.
- Portal User **are unable** to re-align the same Unit with any new assets whilst *in flight* via the standard alignment process under Unit Management, as such changes will be encompassed through the Global Versioning process.

A Unit Tile is marked as 'locked' or 'frozen' whilst Global Versioning is in flight using a '**I**' symbol adjacent to the name of the Unit.



The screenshot shows a unit tile for 'Balkans'. The name 'Balkans' is displayed in bold black text. To its right is a small grey circle containing a white lowercase letter 'i', which is highlighted by a red rectangular box. Further to the right is a vertical ellipsis menu icon. Below the name is a green pill-shaped button with a white dot and the text 'Accepted'. The tile contains the following details:

Unit Id	AG-0DC
Applicable Market	Balancing Services
Type	Generation Unit;Demand Unit
Generation Capacity	10
Demand Capacity	10
Assets	2

8.13. Variation to the Global Versioning Application Form

8.13.1. Reduction in Capacity via modification to individual asset(s)

In the instance that a Unit's 'Use Case' for Global Versioning is due to an overall reduction in Demand or Generation Capacity, either by way of a change in the asset composition or a modification to an individual asset, the steps adopted to initiate Global Versioning are the same as previously outlined. It is critical to ensure the steps to confirm/update the prequalification parameters are also undertaken to ensure the accurate eligibility status is arrived.

When the Versioning Tests are concluded the Unit is deemed as **'Eligible'** on the assumption that the 'automated' versioning criteria is satisfied. This eligibility status is *also awarded* if the Unit has any existing associated prequalification applications that have **since been classified as 'Rejected'**. In this instance, these prequalification applications for specific service delivery will **no longer be eligible to continue as of the effective from date for Version 2.0** (or the latest version). A supporting email notification will be issued to confirm this outcome for each respective prequalification application affected as advance warning.

The screenshot displays the 'Unit Management' interface. At the top, there is a navigation bar with 'Units', 'Assets', and 'Change request' tabs. Below this, a message states: 'If you want to create the UNIT for RDP MW Dispatch, Please register a new Asset and the UNIT will be created automatically.' The main content area shows a table of units with columns for Unit, Unit type, Generation, Demand, and Asset n. A red box highlights the first row of the table, and a green box highlights the second row. To the right of the table, there is a legend for 'Old Unit' and 'New Unit', and a dropdown menu for 'Eligibility test' with 'Eligible' selected. A button 'Add baskets for versioning' is located at the bottom of the interface.

Unit	Unit type	Generation	Demand	Asset n.
Europe	Generation Unit,...	10	10	2
	Generation Unit,...	5	5	1

8.13.2. Increase in Capacity (or no net change in Capacity) due to re-alignment or change in composition of asset(s)

In the instance that a Unit's 'Use Case' for Global Versioning is due to an overall increase in Demand or Generation Capacity (or results in no net change in the total capacity) by way of a re-formation of asset composition - the steps adopted to initiate Global Versioning as the same as previously outlined.

The Portal User must ensure when completing the Global Versioning Application Form that they select the correct option on the first screen **to only 'Add/Remove' Asset(s)**.

The Portal User will also be expected to complete the re-alignment section to confirm the new formation of assets.

Unit	Unit type	Generation	Demand	Asset n.	Eligibility test
Balkans	Generation Unit...	10	10	2	Draft

Versioning Application

You are about to proceed with the versioning process. To be eligible your Unit will either experience a change in the existing formation of assets by either removing, adding or replacing assets and/or also experience a modification to any or all of the asset(s).

Versioning categories

- Add/Remove Asset(s)
- Modifying existing Asset(s)

Re-align assets

Current assets

Name	Type	Generation Capacity	Demand Capacity
Phage	Generation Unit Demand Unit	1	1
Safe	Generation Unit Demand Unit	1	1

Available assets

Name	Type	Generation Capacity	Demand Capacity
Chaperone	Generation Unit Demand Unit	10	10
Tab	Generation Unit Demand Unit	1	1
Beta	Generation Unit Demand Unit	1	1
Hexa	Generation Unit Demand Unit	10	10

8.13.3. Increase in Capacity (or no net change in Capacity) due to re-alignment or change in composition of asset(s)

Where the Unit's Total Capacity increases, the eligibility outcome status will change to **'In Review'** immediately after the Global Versioning Form is completed. It will be routed to the ESO Registrations Team to appraise and change the status to Eligible.

Units marked as pending eligibility require the approval of the NG ESO Registration Team & Account Managers.

Search for unit name

Change effective from date Empty basket

1 units Legend: Old Unit New Unit

Unit	Unit type	Generation	Demand	Asset n.	Unit type	Generation	Demand	Asset n.	Eligibility test
Scandinavia 1	Generation Unit;...	10	10	2	Generation Unit;...	15	15	3	In Review

Units marked as pending eligibility require the approval of the NG ESO Registration Team & Account Managers. Process basket

Search for unit name

Change effective from date Empty basket

1 units Legend: Old Unit New Unit

Unit	Unit type	Generation	Demand	Asset n.	Unit type	Generation	Demand	Asset n.	Eligibility test
Scandinavia 1	Generation Unit;...	10	10	2	Generation Unit;...	15	15	3	Eligible

Property	Accepted	Versioned
Unit Id	AG-0EB	AG-0EB
Applicable Market	Balancing Services	Balancing Services
Type	Generation Unit;Demand Unit	Generation Unit;Demand Unit
Generation Capacity	15	10
Demand Capacity	15	10
Assets	3	2

8.14. Distinction between Primary and Impacted Units

Primary Units are considered as those which the Market Provider intentionally selects for Global Versioning. Impacted Units are those Units which share at least one common asset that is subject to modification. The Global Versioning Process rules will detect and implicate any connected Units at the point the 'primary' Unit's asset(s) have been modified and at the end of the Global Versioning Application Form completion.

Impacted Units will be 'pulled' into the same Global Versioning Basket as the Primary Unit and will require the same approach as the primary Unit in order to allow the Basket to complete processing. This means, that an application form will require completion for every impacted Unit in the same basket.

The application form for Impacted Units has been adjusted however to allow Portal Users the option to indicate the following options;

- No further changes to be added.
- Additional changes required – subsequent changes to the current composition of asset(s)
- Additional changes required – subsequent changes to prequalification section only as a direct result of the modification to the connected asset(s)

An example of listed impacted Units connected to a Primary Unit will display as illustrated below within a given basket.

The screenshot shows a software interface for managing units. At the top, there is a header with 'CL-000000025' and 'Total Units 1'. Below this, there is a 'Back to primary units' link. A green box highlights a paragraph of text: 'Below are listed all the impacted Units as a result of the versioning process, and their re-calculated parameter values. Once the basket is processed, these Units will be automatically versioned as shown. All Units set to "Draft" will require further information by completing the Versioning Application Form'. Below this text is a table with columns: Unit, Unit type, Generation, Demand, Asset n., Eligibility test, and Origin. The table has one row: 'Scandinavia 1', 'Generation Uni...', '15', '15', '3', 'Draft', 'Scandinavia 2'. A red box highlights the 'Draft' status and the 'Complete versioning application' button. There is also a 'View unit details' button and an 'Add baskets for versioning' button at the bottom.

Additional Customised Options for Impacted Units only

The screenshot shows a 'Versioning Application' form. The title is 'Versioning Application'. Below the title is a paragraph of text: 'You are about to proceed with the versioning process. To be eligible your Unit will either experience a change in the existing formation of assets by either removing, adding or replacing assets and/or also experience a modification to any or all of the asset(s)'. Below this text is a section for 'Versioning categories' with three radio button options: 'Add/Remove Asset(s)', 'Modifying existing Asset(s)', and 'I do not wish to make any other changes to the Unit'. The second option, 'Modifying existing Asset(s)', is selected. Below the options are two buttons: 'Cancel' and 'Confirm'.

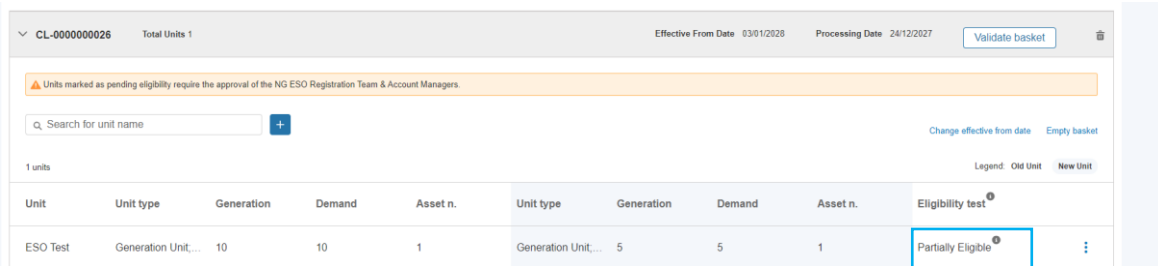
8.15. Errors in Processing Global Versioning Requests

Upon submitting Global Versioning Application Forms for every Unit in the Basket and the Validate Basket Custom Button has been selected, there may be occasion for an individual Unit to fail the Validation Tests.

The **eligibility test outcome** will display as '**partially eligible**' for such Units, however the ESO internal teams will be alerted to the root cause of the Validation Fail and will be expected to investigate and resolve the issue connected to the Unit in question. Once the Validation issue is rectified, the ESO internal teams (Contract/Account Managers) will notify the Portal User directly. Following this, the Portal User will be expected to 're-select' the Validate Basket button again, in which instance the expectation is that the Validation Test will pass, enabling the Portal User to continue with the processing of the basket.

Causes behind Validation Test errors can be due to any of the following;

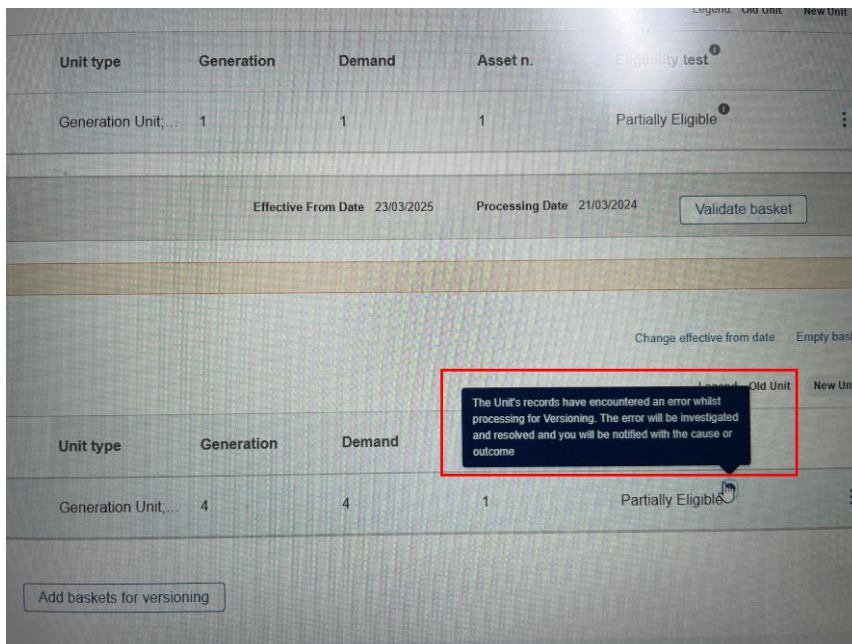
- Issues with or the data collected through the Versioning Application Form
- Issues with poor or missing data on the origin records
- A combination of the two above



The screenshot shows a web interface for unit management. At the top, there is a header with 'CL-000000026', 'Total Units 1', 'Effective From Date 03/01/2028', 'Processing Date 24/12/2027', and a 'Validate basket' button. Below the header is a warning message: 'Units marked as pending eligibility require the approval of the NG ESO Registration Team & Account Managers.' A search bar for unit names is present. The main table has columns for 'Unit type', 'Generation', 'Demand', and 'Asset n.'. The first row shows 'ESO Test' with 'Generation Unit, ...' and values 10, 10, 1. The second row shows 'Generation Unit, ...' with values 5, 5, 1. The 'Eligibility test' column for the second row is 'Partially Eligible', which is highlighted with a blue box.

Unit	Unit type	Generation	Demand	Asset n.	Unit type	Generation	Demand	Asset n.	Eligibility test
ESO Test	Generation Unit, ...	10	10	1	Generation Unit, ...	5	5	1	Partially Eligible

An error message will appear when the 'i' icon is hovered over to explain the Status.



The screenshot shows a similar interface to the previous one, but with a tooltip displayed over the 'Partially Eligible' status. The tooltip text reads: 'The Unit's records have encountered an error whilst processing for Versioning. The error will be investigated and resolved and you will be notified with the cause or outcome.' The tooltip is highlighted with a red box.

Unit type	Generation	Demand	Asset n.	Eligibility test
Generation Unit, ...	1	1	1	Partially Eligible

Effective From Date 23/03/2025 Processing Date 21/03/2024 Validate basket

Change effective from date Empty basket

Legend: Old Unit New Unit

Unit type Generation Demand Asset n. Eligibility test

Generation Unit, ... 4 4 1 Partially Eligible

Add baskets for versioning

8.16. Managing Associated Units that share Assets that have been subject to Global Versioning

Unit Formation

If an asset has been aligned to a Unit in 'Draft' or 'Submitted' States , where the asset has been subject to Global Versioning it is expected that the Portal User must essentially refresh the Unit's alignment to factor in the latest incarnation of the Asset that has been versioned.

This may require the Unit to be re-aligned and then re-submitted to the ESO Business Unit for appraisal.

Existing Pre-qualifications associated with Assets that have been subject to Global Versioning

If an asset has been aligned to a Unit in 'Draft' or 'Submitted' States that also has premature prequalification applications (Draft, Incomplete, Signature in Progress) then it is also expected that a new prequalification is applied for to ensure the latest asset version is referenced, and the correct asset testing data is factored in the application.

11.4 Global Versioning Scenarios & Global Versioning Criteria

Evaluation Criteria & Scenario's for Versioning Types.

Use Case	Example		Requires Versioning	Versioning Type	Eligibility Status
<p><i>My Unit's total capacity will reduce beyond the current capacity as a result of removing or modifying the capacity on an existing asset(s)</i></p> <p>AND</p> <p><i>The total capacity will reduce below the Service Minimum Threshold for the Service(s) for ALL OR ANY it has been pre-qualified for already</i></p>	Capacity on Version 1.0	20 MW	Yes	Unit: Automated Prequalification: Automated	<p>Eligible (Unit = Accepted) (Prequalification = Rejected)</p>
	Allocated Volume for DC HF	10 MW			
	Allocated Volume for DC LF	15 MW			
	Capacity Version 2.0	10 MW			
	Service Minimum Threshold (SMT) DC HF (8 MW) DC LF (8 MW)				
Use Case	Example		Requires Versioning	Versioning Type	Eligibility Status
<p><i>My Unit's total capacity will reduce beyond the current capacity as a result of removing or modifying the capacity on an existing asset(s)</i></p> <p>BUT</p>	Capacity on Version 1.0	50 MW	Yes	Unit: Automated Prequalification: Automated	<p>Eligible (Unit = Accepted) (Prequalification = Approved)</p>
	Allocated Volume for DC HF	10 MW			

<p>The total capacity will remain above the Service Minimum Threshold for the Service(s) for ALL OR ANY it has been pre-qualified for already</p>	Allocated Volume for DC LF	15 MW			
	Capacity Version 2.0	20 MW			
	Service Minimum Threshold (SMT) DC HF (10 MW) DC LF (10 MW)				
Use Case	Example		Requires Versioning	Versioning Type	Eligibility Status
<p>My Unit's total capacity will increase beyond the current capacity as a result of adding or modifying the capacity on an existing asset(s)</p> <p>AND</p> <p>The total capacity will increase above the Service Minimum Threshold for the Service(s) for ALL OR ANY it has been pre-qualified for already</p>	Capacity on Version 1.0	20 MW	Yes	Unit: Manual Versioning required. Prequalification: Automated Approval.	<p>In Review (Unit = In Review) (Prequalification = Approved)</p>
	Allocated Volume for DC HF	10 MW			
	Allocated Volume for DC LF	15 MW			
	Capacity Version 2.0	30 MW			
	Service Minimum Threshold (SMT) DC HF (10 MW) DC LF (10 MW)				

11.5 Global Versioning Email Alerts

A series of Email Alerts are sent to all Portal Users for a given Market Provider that share the Unit Manager & Related Entity Role, even where Global Versioning is initiated by a particular Portal User.

Enclosed are example templates;

At the point that the Provider is expected to commit to the final changes and authorise process completion for Global Versioning to conclude.

FW: [EXTERNAL] Sandbox: Your Global Versioning Basket is pending processing.



Laila Zaghari
To ● Laila Zaghari

Reply Reply All Forward

Fri 16/02/2024 11:34

nationalgridESO

Date: 16/02/2024

Your basket(s) are awaiting processing. The Unit's are ready to complete the Global Versioning Process, however require your input by selecting the 'process' link to commit the changes and subject your basket to the final step of Global Versioning.

Please click the link below to direct you to where your Basket(s) are stored in SMP.

[Take me to my Basket\(s\) awaiting processing](#)

Copy this Link & Paste in your Browser

<https://nationalgrideso--sharedqa.sandbox.my.site.com/singleMarketsPlatform/s/login>

Thank you,

National Grid (ESO) – Single Markets Platform

How to get in touch:

commercialoperations@nationalgrideso.com


<https://www.nationalgridSMP.com>

nationalgridESO

8.17. 11.5.1 Global Versioning Email Alerts



At the point that the Provider is notified that an existing Prequalification Application is no longer eligible to continue

FW: [EXTERNAL] Sandbox: Your Prequalification Application - Re-evaluation Outcome Result

 Laila Zaghari
To: Laila Zaghari

Reply Reply All Forward

Fri 16/02/2024 11:35



Date: **10/01/2024**

Following your Versioning Application, some or all of your existing Prequalification Application Submissions are no longer eligible to participate and therefore marked as Rejected.

Please click the link below to direct you to the SMP Prequalification Section to review which applications have been affected.



[\[Take me to my Prequalification Applications\]](#)

Copy this Link & Paste in your Browser
<https://nationalgrideso--shareddev.sandbox.my.site.com/singleMarketsPlatform/s/unit-management>

Thank you,

National Grid (ESO) – Single Markets Platform

How to get in touch:
commercialoperations@nationalgrideso.com
<https://www.nationalgridSMP.com>



11.5.2 Global Versioning Email Alerts

At the point that the Provider is notified that an existing Prequalification Application is eligible to continue

FW: [EXTERNAL] Sandbox: Your Pre-qualification Application Subro Unit 001 & Static FFR has be...

 Laila Zaghari
To: Laila Zaghari

Reply Reply All Forward

Fri 16/02/2024 11:37

From: noreply@salesforce.com <noreply@salesforce.com> on behalf of Commercial Operation <commercial.operation@nationalgrideso.com>
Sent: 09 February 2024 01:41 PM
To: Subhransu Sekhar <Subhransu.Sekhar@nationalgrid.com>
Subject: [EXTERNAL] Sandbox: Your Pre-qualification Application Subro Unit 001 & Static FFR has been approved

CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe. If you suspect this email is malicious, please use the 'Report Phish' button.



Congratulations, your Prequalification Application for the above Unit has been approved.

[Click here](#) for a link to the application with the uploaded Form C appended.



This e-mail, and any attachments are strictly confidential and intended for the addressee(s) only. The content may also contain legal, professional or other privileged information. If you are not the intended recipient, please notify the sender immediately and then delete the e-mail and any attachments. You should not disclose, copy or take any action in reliance on this transmission.

You may report the matter by contacting us via our UK Contacts Page or our US Contacts Page (accessed by clicking on the appropriate link)

Please ensure you have adequate virus protection before you open or detach any documents from this transmission. National Grid plc and its affiliates do not accept any liability for viruses. An e-mail reply to this address may be subject to monitoring for operational reasons or lawful business practices.

For the registered information on the UK operating companies within the National Grid group please use the attached link: <https://www.nationalgrid.com/group/about-us/corporate-registrations>

9. User Management






This functionality facilitates an end-to-end self-service capability for users to manage access and permissions across their organisation on the SMP Portal. With the advent of the Single Sign-On Functionality in effect as of Release 2.8, **all secondary or additional users for the same Market Provider (Account) will be required to complete the standard registration process akin to first time user registration in order to allow them to acquire their SSO login credentials.**

All or any prospective secondary or additional users for the same Account (Market Provider) will still require 'authorisation' from their respective Super User in order to be added to the Account in question. The only pre-requisite is that an Active Super User is assigned to the Account in question prior so they are in a position to receive registration requests from prospective users which will be routed to them upon logging into SMP. This chapter will cover the steps required to authorise registration requests as a Super User.

The existing User Role Framework will remain in place and once Secondary/Additional Users have completed registration, their Super User will remain able to take advantage of the User Management Functionality.

9.1. User Management Role Framework

Figure 11.1 User Group Roles

<u>User Group</u>	<u>Description</u>
Admin User - Group 1 	Able to add users to Company Account, able to update User's details, Able to activate Users, Able to Freeze Users, Able to enable access for locked out users.
Unit Manager - Group 2 	Able to Create or Register or Update Assets, able to create or register or update Units, able to align assets to a unit, able to version units and assets, able to pre-qualify Units and submit pre-qualification data.
Entity Manager - Group 3 	Able to accept an request for a Agent to act on behalf of a Service Provider, able to initiate a request to act as a Agent for a Service Provider, able to view other Accounts or Service Provider Units or Records (agent), able to act on behalf of a Service Provider, able to withdraw an Agent or as an Agent on behalf of a Service Provider.
Finance Manager - Group 4 	Able to update or edit or view financial data for own Account, able to view and update Settlement data.
Authorised Signatory - Group 5 	A Director or Duly Authorised Signatory for the Service Provider or Agent, able to sign on behalf of the Service Provider/Agent adherence to National Grid ESO Terms and Conditions or Procurement Documents.

9.2. Super Users & Secondary User Registration Approvals

In order to provide an organisation with agency to apply and manage the roles listed in the table overleaf, an overarching role entitled '**Super User**' has also been created. As of *Release 2.8 the key feature of the Super User Role is to enable them to specifically appraise inbound registration requests generated from the ESO Website in order to complete the registration process and allow access to the SMP Portal by extension.*

As of Release 2.8 only **one** Super User Role will continue to be allocated for each company or organisation. Where a company or organisation has multiple users currently registered, a single user should be nominated for the Super User Role to manage the other existing users.

As of Release 2.8 the Super User Role has now been *combined* with the previous **User Admin Role**. The Super User will be able to fulfil both tasks of authorising registration requests and managing the suite of User Roles.

The Super User role is **exclusively assigned and managed** by the Contracts Management Team in line with Business Rules.

9.3. User Role Business Rules

The User Management approach has been designed to allow for flexibility and agility in what level of access and visibility to functionality on the portal are granted, recognising that this may evolve or change over the user's lifetime. With this in mind these are currently the business rules;

1. As of Release 2.8, the *default* Role assigned to every active User universally at the point registration is complete and they have been allocated their SSO credentials allowing them access to SMP is the Unit Manager Role.
2. Super Users can elect to supplement this Unit Manager Role with additional roles; however the **default role will remain**. This will also apply to the Role entitled 'Authorised Signatory'. *This will be restored in the next Release, allowing Users to be assigned the Authorised Signatory exclusively if so required.*
3. Roles are not mutually exclusive: A user can be assigned more than one role at any time with the exception of the Super User Role which is allocated from the outset and by the Contract's Management Team. For example a secondary user can be assigned a combination of 'Unit Manager' and 'Related Entity Manager' role. Moreover, provision has also been made for the same User to be assigned an Authorised Signatory Role and remain a Unit Manager. *As of Release 2.8 due to a restriction, A User cannot be allocated exclusively an Authorised Signatory Role both at the point of registration and thereafter. This will be remedied in an upcoming Release.*
4. A Super User can also assign themselves all other roles if they so wish.
5. Roles can be assigned or de-assigned at any point in time by the Super User on behalf of other secondary users. For example if a secondary user was assigned

9.4. User Role Business Rules

the 'Related Entity Manager Role' initially, then it can be withdrawn at a later stage.

6. **De-activation of User's Access to SMP Portal:** As of Release 2.8, Super User's remain exclusively under the control and management of the Account/Contract Management Team, therefore their Super User Role can only be revoked by the team in question. Secondary Users however **can now be de-activated** from accessing the SMP Portal by their respective Super User.
7. In the instance of a Super User no longer requiring access to the SMP Portal or wishing to re-assign their Super User status to another User, it is imperative that the user in question contacts their respective Account Manager to action this request.
8. **As of Release 2.8, it is now imperative that any SMP Portal Accounts with at least one active User must have a Super User Role assigned. This will ensure that any prospective secondary or additional users wishing to register and gain access to the same Account will be able to take advantage of the registration process in its entirety.**
9. Where an SMP Portal Account has only one active User assigned and they are the designated Super User, if the Super User is not replaced and there are no **other active Portal Users associated with that Account**, then it is within the remit of the Contracts or Account Management Team to remove access to SMP for the User(s) in question and/or remove their Super User Role for the purposes of Data Protection and Compliance.
10. Designated Authorised Signatories will remain able to be selected on prequalification applications in order to take advantage of the digital signature capability on behalf of your company/organisation. However, the User's in question must be assigned the Authorised Signatory Role prior. This will be a one-off exercise, once set up they will be in a position to access the digital signature capability for all future prequalification applications.
11. New Roles can be onboarded for use on the SMP Portal with future Releases, and therefore the current portfolio of User Roles are not restricted.
12. Each Company/Organisation is allocated a universal quota of **five** capped User Licences, *to increase this allowance, then the Market Provider must approach their Contract/Account Manager directly.*

The following sections will address the methodology to allocating User Roles on the SMP Portal for Release 2.8

9.5. Approval of Secondary User Registration Requests by the Super User

As a Super User, all future or prospective Secondary Users associated with the same Company/Account (*on the basis of an identical Company Registration Number and Company Name*) will automatically be routed to the designated Super User for the Account (Company) in question. Moreover, an automated Email Notification will be issued and sent to the Super User to alert them to each prospective secondary user pending their approval.

- As the Super User, you will login into the SMP Portal using the standard SSO procedure.
- You will be transported to the SMP Portal, where you can then navigate to the User Tab to access the User Management Functionality.
- A new tab has been added entitled 'Registration Requests' where all prospective registration requests are routed and will be displayed as an itemised 'list view'.
- As the Super User, you will be able to either opt to 'Accept' or 'Decline' the Registration Request.
- A pop up notification will appear offering you the opportunity to confirm your decision to Accept or Decline accordingly.
- If you select 'Accept' an Email Notification will be generated to the User in question to acknowledge confirmation and equally If you select ' Decline' an Email Notification will be generated to the User in question to acknowledge rejection of the request.
- Finally, accepted requests are transferred to the 'Active Users' Tab and 'Declined' request are transferred to the 'Inactive' Users Tab accordingly. The Requests should disappear from the 'Registration Requests' Tab as itemised listings.

9.6. Approval of Secondary User Registration Requests by the Super User

The screenshot displays the 'Users' management page in the nationalgridESO system. The navigation menu at the top includes 'Overview', 'Market Entry', 'Unit Management', 'User' (highlighted with a red box), and 'My Reports'. The main content area is titled 'Users' and features a 'Licenses' donut chart showing 1 used and 3 available licenses. Below the chart are tabs for 'Active users', 'Registration Requests' (highlighted with a red box), and 'Inactive users'. A search bar for 'Search User name' is present, showing 0 results. A table lists the user 'Kelly Clarkson' with the email 'gefugyze@a11.ioi'. The table has columns for 'Full Name', 'User name', and 'Email'. To the right of the user entry are 'Decline' and 'Accept' buttons, both highlighted with red boxes.

Full Name	User name	Email	
Kelly Clarkson	gefugyze@a11.ioi	gefugyze@a11.ioi	<input type="button" value="Decline"/> <input type="button" value="Accept"/>

9.7. Approval of Secondary User Registration Requests by the Super User – Acknowledgement Screens

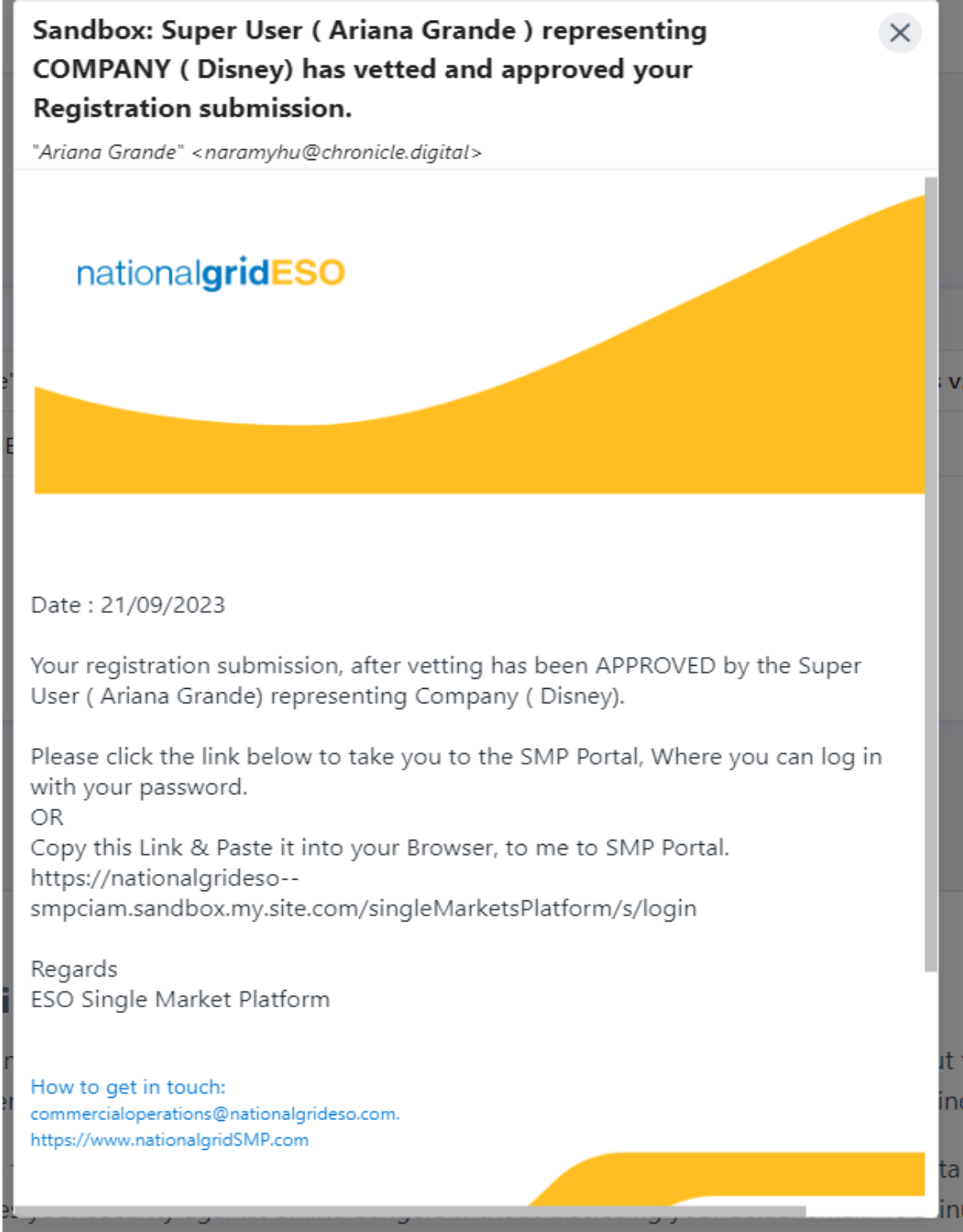
The screenshot shows the 'Users' management page. On the left, there is a 'Licenses' section with a donut chart showing 1 used and 4 available licenses. Below it are tabs for 'Active users', 'Registration Requests', and 'Inactive users'. A search bar is present. The main area displays a table with one user: Kelly Clarkson (gefygze@ai1.io). A modal window titled 'Registration Request Accepted' is centered on the screen, containing the text: 'You have successfully accepted the registration request. You now have 4 license remaining.' and a 'Go Users Page' button.

This screenshot shows the 'Active users' tab selected. The 'Registration Requests' and 'Inactive users' tabs are also visible. The search bar shows '2 Users'. The table lists two users:

User name	Email	User role	Status
Ariana Grande	narmyhu@chronicle.digital	User Admin +2 roles	Active
Dua Lipa	qywefyu@letrs.email	Unit Manager	Active

This screenshot shows the 'Users' management page with the 'Accept Registration Request' modal open. The modal text reads: 'Accept Registration Request. Are you sure you want to accept this request? The user will automatically receive a license and access to the portal.' There are 'Cancel' and 'Accept' buttons. In the background, the user table shows Kelly Clarkson with a 'Decline' button and an 'Accept' button.

9.8. Approval of Secondary User Registration Requests by the Super User- Email Alerts



Sandbox: Super User (Ariana Grande) representing COMPANY (Disney) has vetted and approved your Registration submission.

"Ariana Grande" <naramyhu@chronicle.digital>

nationalgridESO

Date : 21/09/2023

Your registration submission, after vetting has been APPROVED by the Super User (Ariana Grande) representing Company (Disney).

Please click the link below to take you to the SMP Portal, Where you can log in with your password.

OR

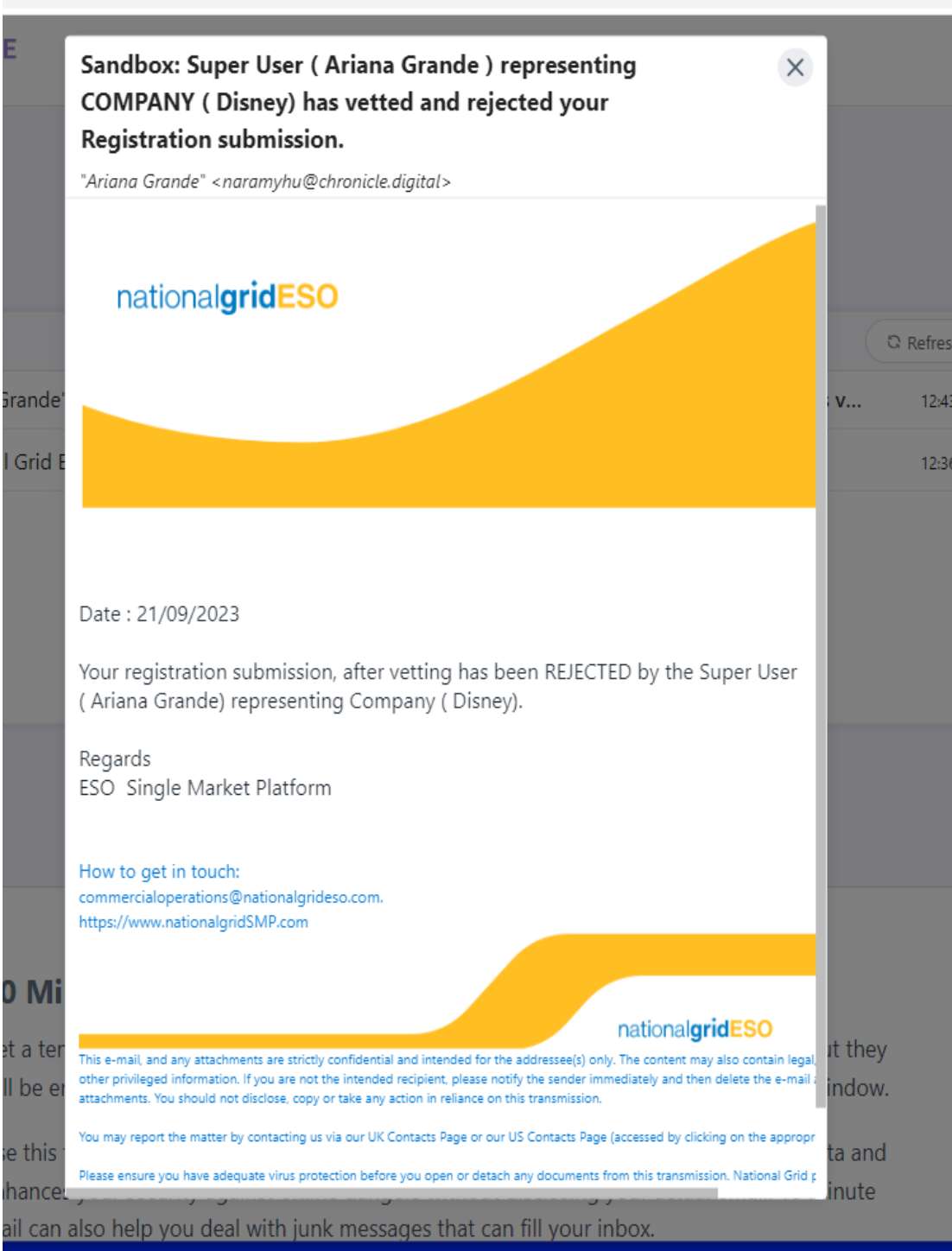
Copy this Link & Paste it into your Browser, to me to SMP Portal.

<https://nationalgrideso--smpciam.sandbox.my.site.com/singleMarketsPlatform/s/login>

Regards
ESO Single Market Platform

How to get in touch:
commercialoperations@nationalgrideso.com.
<https://www.nationalgridSMP.com>

9.9. Approval of Secondary User Registration Requests by the Super User- Email Alerts



Sandbox: Super User (Ariana Grande) representing COMPANY (Disney) has vetted and rejected your Registration submission.

"Ariana Grande" <naramyhu@chronicle.digital>

nationalgridESO

Date : 21/09/2023

Your registration submission, after vetting has been REJECTED by the Super User (Ariana Grande) representing Company (Disney).

Regards
ESO Single Market Platform

How to get in touch:
commercialoperations@nationalgrideso.com.
<https://www.nationalgridSMP.com>

nationalgridESO

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Onboarding Users to the EAC Platform

In order for any SMP Portal (Active) Users to gain access to the EAC Platform it is mandatory they are assigned the **Trader Role by their respective Super User**.

- To do this, the Super User will assume the usual steps for assigning new roles to Active Users with the only exception being they ensure they add they select the Trader Role.
- When the User is assigned the Trader Role, it will appear under their 'profile' under their respective listing on the Active Users Tab.
- Upon next logging on the User will be able to view the EAC Application Tab on the top right hand side of the SMP Portal Home Page/Screen. Upon clicking on this, they will automatically be re-directed to the EAC Platform without the need to login again.

The screenshot shows the 'Active users' management interface. At the top, there are tabs for 'Active users', 'Registration Requests', and 'Inactive users'. Below this is a search bar labeled 'Search User name' and a count of '2 Users'. A table lists the active users:

User name	Email	User role	Status
> Ariana Grande	naramyhu@chronicle.digital	User Admin +2 roles	Active
▼ Mariah Carey	piwijeru@refined.blog	Unit Manager	Active

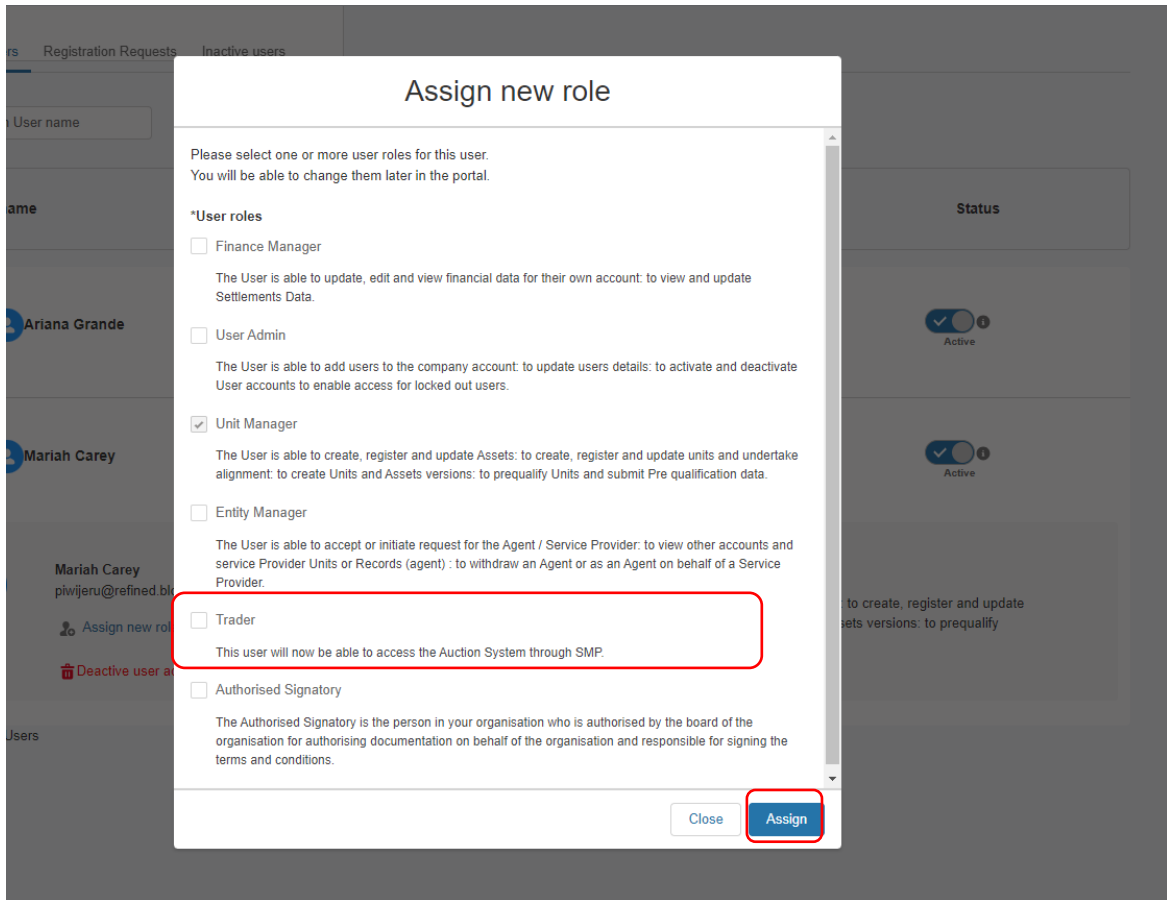
Below the table, a modal window for Mariah Carey is open, showing her profile and a list of roles and permissions. The 'Assign new role' button is highlighted with a red box. The modal content includes:

Assign new role

User roles and permissions

- Unit Manager** x The User is able to create, register and update Assets: to create, register and update units and undertake alignment: to create Units and Assets versions: to prequalify Units and submit Pre qualification data.

9.10. Assigning the Trader Role



9.11. Restrictions on Users with exclusively Trader Role

Following feedback from Market Providers the Trader Role has been adapted to allow Users with exclusively this role to view the Unit and Asset Portfolio without the ability to make changes or manage the Unit and Asset Portfolio and pre-qualifications. If Users wish to be able to do both, then they will require the Unit Manager AND the Trader Role assigned.

9.12. Visibility of the Trader Role on the SMP Portal

The screenshot displays the 'Active users' section of the SMP Portal. At the top, there are tabs for 'Active users', 'Registration Requests', and 'Inactive users'. Below the tabs is a search bar labeled 'Search User name'. The main content area shows a list of 2 users. The first user is Ariana Grande, with email naramyhu@chronicle.digital, role 'User Admin' (+2 roles), and status 'Active'. The second user is Mariah Carey, with email piwijeru@refined.blog, role 'Unit Manager' (+1 roles), and status 'Active'. Below the list, there is a detailed view for Mariah Carey, showing her profile and a section for 'User roles and permissions'. This section lists 'Unit Manager X' and 'Trader X'. The 'Trader X' role is highlighted with a red box, and its description states: 'This user will now be able to access the Auction System through SMP.'

User name	Email	User role	Status
Ariana Grande	naramyhu@chronicle.digital	User Admin +2 roles	Active
▼ Mariah Carey	piwijeru@refined.blog	Unit Manager +1 roles	Active

There is no Users

9.13. Visibility of the EAC 'hyperlink' on SMP for Trader Role Users

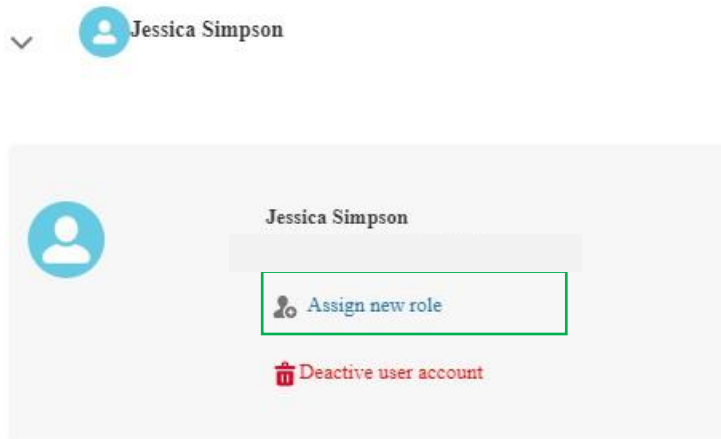
The screenshot shows the user account page for nationalgridESO. The navigation bar includes 'Overview', 'Market Entry', 'Unit Management', and 'My Reports'. In the top right corner, there is a red box highlighting the 'EAC Application' link and a user profile icon. Below the navigation bar, the 'Account' section is visible, with a 'My Company Details' card that says 'Manage your company details and financial information.'

9.14. Managing Registered Secondary Users (Active)

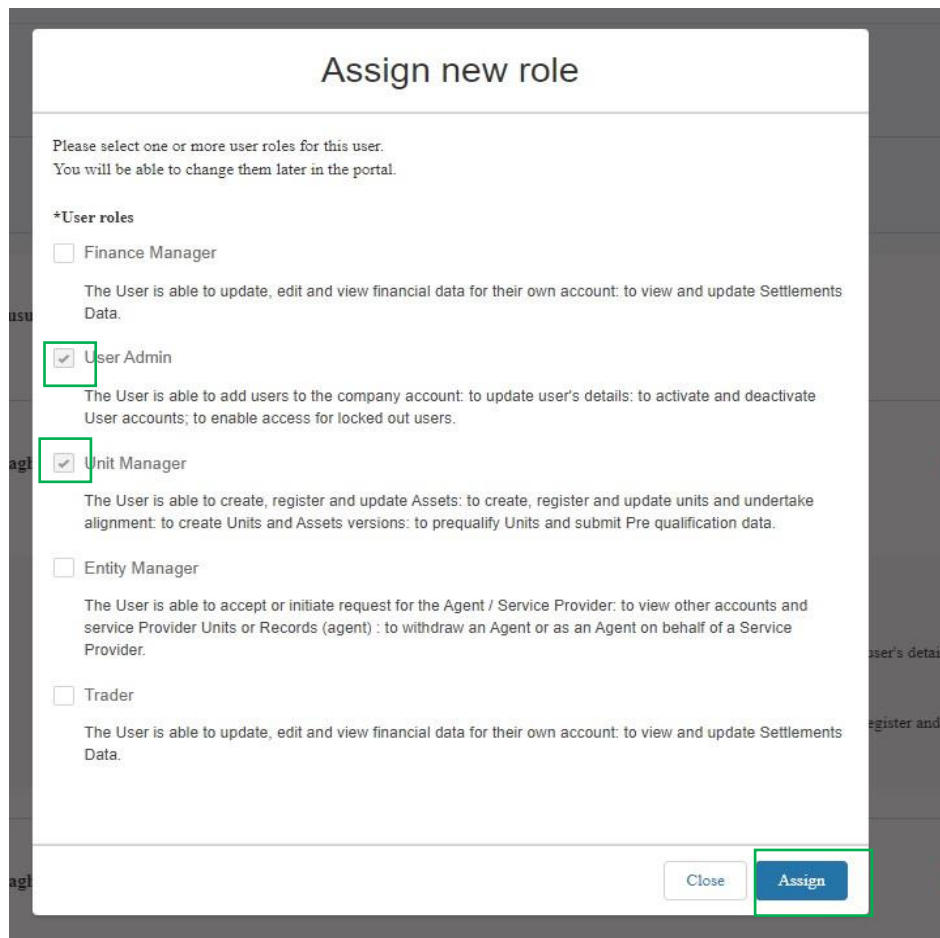
- Once the new secondary user is approved – they will be instantly added to the ‘Active’ Users tab as an itemised User. This will mark the end of the registration process following the SSO verification and authentication pre-requisite steps that take place prior to the secondary user registration request being routed to the Super User. Conversely, if the secondary user is rejected, then they will ‘shift’ to the inactive Users Tab.
- In the example below, *Jessica Simpson’s* will present as an itemised line with a summary view, to look at her ‘profile’ in more detail, the user can select the drop down arrow adjacent to her name. A collapsible section will appear with her profile’s details including the User roles assigned under the User and permissions sub-section.
- The Active toggle button is for *read-only purposes*. As of Release 2.8, Users with the **Super User Role continue not to be able to de-activate secondary users directly using this functionality.**

9.15. Adding additional roles to Secondary Users (Active)

Figure 11.5 – Assign new Role Screens

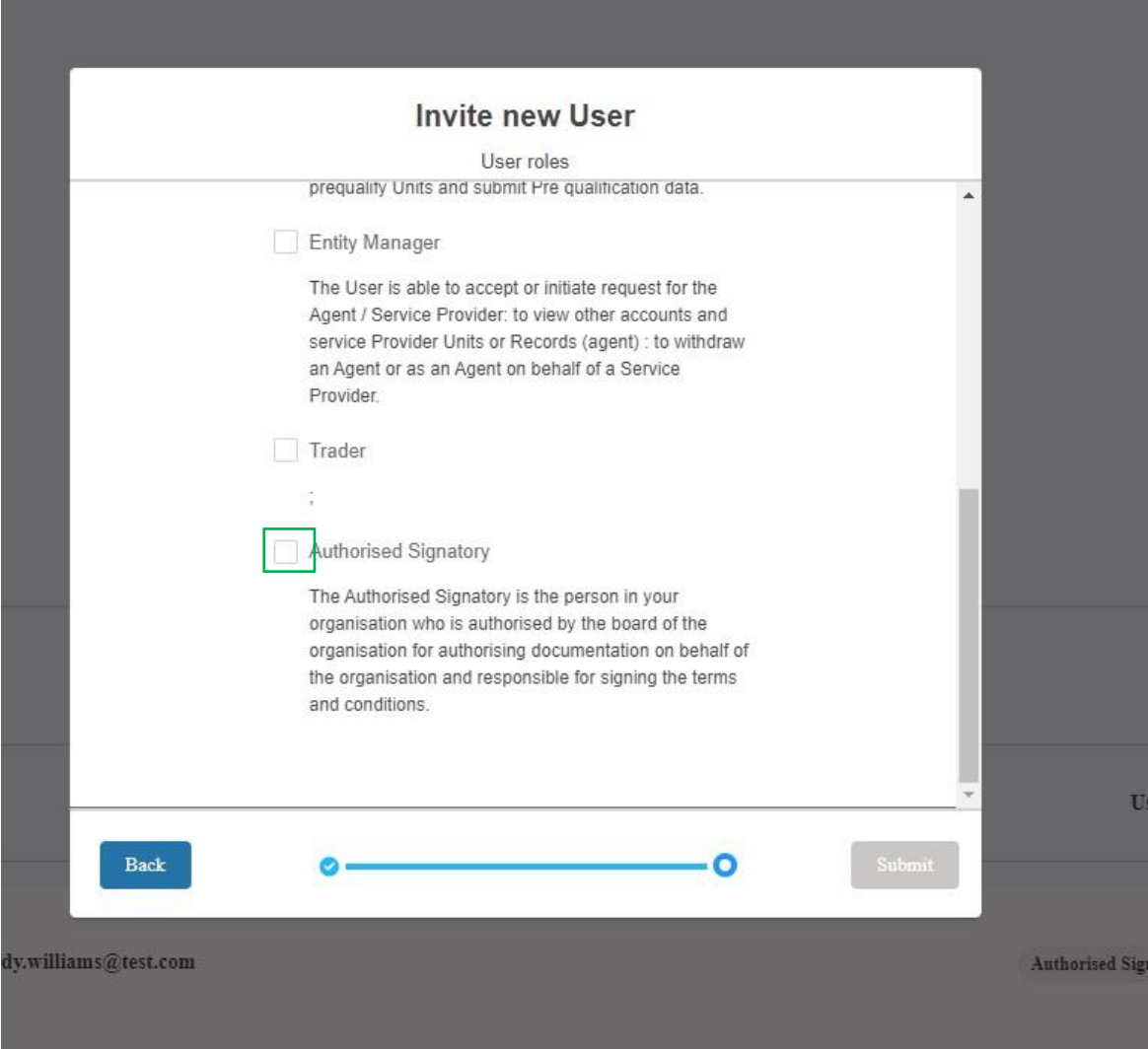


- To add additional roles to an existing User's 'Profile', a *User Admin Role based User* must select the Assign new role option as illustrated in Figure 11.5
- The Assign new Role screen will appear prompting the User to select from the list the additional supplementary roles to add to the user's profile. The existing Roles already allocated will appear as checked. Once complete, select *Assign*.



9.16. Adding Authorised Signatory

In order to leverage the Digital Signature functionality, the Authorised Signatory must be registered by the Super User/User Admin in advance of the pre-qualification process being started.



The screenshot shows a web interface for inviting a new user. The main heading is "Invite new User". Below it, the section is titled "User roles". A scrollable list of roles is shown, with the "Authorised Signatory" role selected, indicated by a green square around its checkbox. The description for "Authorised Signatory" is: "The Authorised Signatory is the person in your organisation who is authorised by the board of the organisation for authorising documentation on behalf of the organisation and responsible for signing the terms and conditions." At the bottom of the form, there are three buttons: "Back" (blue), a progress indicator (a blue line with a checkmark and a circle), and "Submit" (grey). The email address "dy.williams@test.com" is visible in the bottom left corner, and "Authorised Sign" is partially visible in the bottom right corner.

Invite new User

User roles

prequality Units and submit Pre qualification data.

Entity Manager

The User is able to accept or initiate request for the Agent / Service Provider: to view other accounts and service Provider Units or Records (agent) : to withdraw an Agent or as an Agent on behalf of a Service Provider.

Trader

;

Authorised Signatory

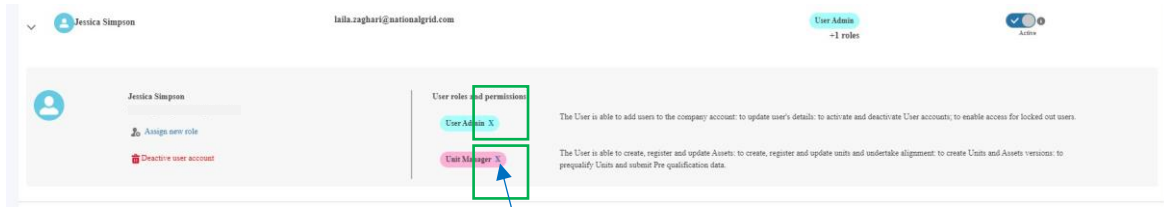
The Authorised Signatory is the person in your organisation who is authorised by the board of the organisation for authorising documentation on behalf of the organisation and responsible for signing the terms and conditions.

Back ✓ Submit

dy.williams@test.com Authorised Sign

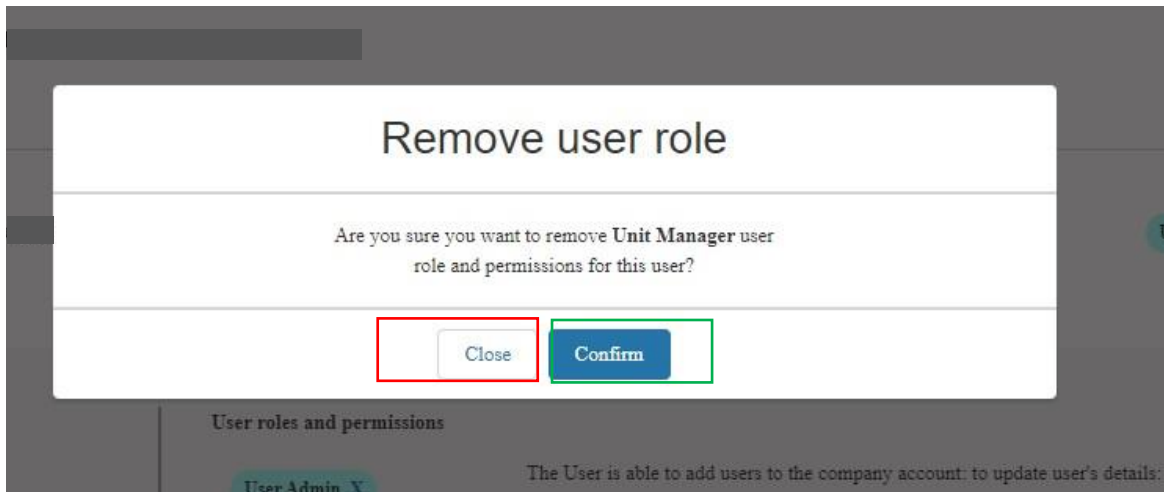
9.17. Removing existing role(s) from Secondary Users (Active)

Figure 11.6 – Unassign existing Role(s) Screens



- To remove an existing role from the user's profile, navigate to the *Role name* under the *User role and permissions* subsection and press the 'X' adjacent to the role name as highlighted in the figure above. This task will have to be repeated for each individual role. In the example above, the 'X' will require removing two fold, once for the 'User Admin' and once for 'Unit Manager'.
- A pop-up notification will appear promptly reminding the portal user to confirm they wish to remove the user role. To proceed select 'Confirm', to abort select 'Close'.
- In order to swap, exchange or switch roles, the methodology of removing and then adding roles to a user's profile is the only way to enable this.

Figure 11.6.1 – Unassign existing Role(s) Screens



- If the User Admin Role experiences any errors or difficulties whilst using the User Management functionality, they should reach out the Contracts Management Team in the first instance by email.

9.18. Removing existing role(s) from Secondary Users (Active)


- As of Release 2.8, all existing Users can have all roles un-assigned with the exception of the Unit Manager Role.

9.19. Deactivating Secondary Users


- As of Release 2.8, Portal Users who have been assigned the 'Super User Role' have the **ability to deactivate Secondary Users**, so that they can no longer access SMP. The reason for this feature is to take ownership of restricting secondary users access in the event it is no longer required.
- Please note that de-activation from the SMP Portal does not mean de-activation of their User Account on the ESO Website. *They will still retain their SSO credentials, they will simply no longer be able to login into SMP. Equally if the User also has access to the Connections Portal, their access will resume.*
- To deactivate a Secondary User account, Super Users should log into the SMP Portal and navigate to the 'User' tab at the top of the screen. They should then locate the name of the user they wish to deactivate and click the arrow to expand the section.
- When section has expanded, there will be a link to 'Deactivate User Account'. After clicking this link, a green confirmation banner will appear at the top of the screen to indicate that the user has been successfully deactivated. An email will be sent automatically to the deactivated user's email address to inform the user that their account has been deactivated and that they can no longer access the SMP Portal.
- This deactivated user can now be found in the list of *Inactive Users*. A Super User can reactivate the deactivated user, by clicking on the arrow next to the name to expand the section.

9.20. Deactivating Secondary Users – User’s Switching from Active List to In-active List

User name	Email	User role	Status
> Alasdair Test 789	alasdair.smith@nationalgrid.com	User Manager	Active
> Authorized Signatory User	alasdair.smith@nationalgrid.com	Authorized Signatory	Active
> Ali Test	alasdair.smith@nationalgrid.com	Authorized Signatory	Active
> Ali Test	alasdair.smith@nationalgrid.com	Authorized Signatory	Active
✓ Ali Secondary	alasdair.smith@nationalgrid.com	User Manager -1 roles	Active


 Ali Secondary
 alasdair.smith@nationalgrid.com
 Deactivate user account
 Deactivate user account

Available
19 / -14



Active users [Inactive users](#)

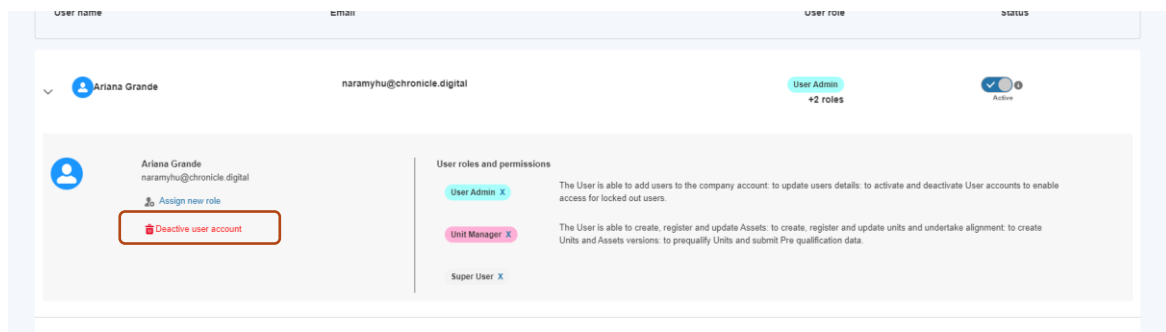
Search User name

5 Users

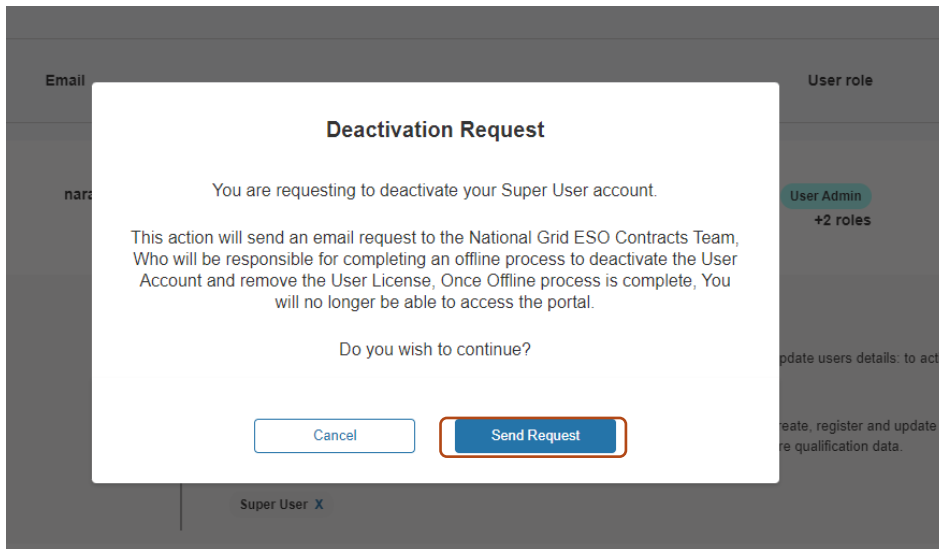
User name	Email	User role	Status
> vineth manager	vineth.vutukuri@nationalgrid.com	Entry Manager	Inactive
> Ali Secondary	alasdair.smith@nationalgrid.com	User Manager -1 roles	Inactive
> finance manager	vineth.vutukuri@nationalgrid.com	Finance Manager	Inactive
> Alasdair Test Secondary	alasdair.smith@nationalgrid.com	User Manager	Inactive

9.21. Deactivating Super Users

- As of Release 2.8, Super Users have the ability to request the deactivation of their own account if they are no longer the designated Super User or they no longer require access to SMP. Please note that as only **One** Super User can be allocated per Account (Company/Organisation) it is imperative that an alternative Super User is identified and assigned the Role to ensure that the Provider is in a position to continue managing their secondary users. To set up an alternative Super User, then person in question must approach their Contract Manager.
- To deactivate their account, Super Users should log into the SMP Portal and navigate to the 'User' tab at the top of the screen. They should then locate their name in the list of users and click the arrow to expand the section.
- When section has expanded, there will be a link to 'Deactivate User Account'. After clicking this link, a pop-up message will be displayed, asking the User to confirm the request to the Contracts Team.
- After clicking 'Send Request', a green confirmation banner will appear at the top of the screen to indicate that an email has been sent to the ESO Contacts Team. After the Contracts Team has processed the request, the user will no longer be able to access SMP.



9.22. Deactivating Super Users – Request Notification



10. Related Entity

10.1. Definition of Related Entity

For the purposes of SMP, a Related Entity is defined as a Service Provider who has entered into a contractual relationship with an Agent to represent the Asset or Assets owned by said Service Provider. In this respect, the Unit will be owned by the Agent and the Assets making up the logical grouping or aggregation will be owned by either a singular Service Provider or a number of Service Providers.

The SMP Portal's role is to enable Market Providers threefold;

1. The ability to initiate relationship requests and select from the set of Market Providers whom have been onboarded on SMP
2. The ability to determine the duration of the relationship and enter into an Agreement for this period
3. The ability to transfer or delegate specific assets on the part of the Asset Owner from within their 'Asset' Portfolio and the ability to 'recall' or withdraw specific assets within the agreement period.

With Release 2.14 Market Providers **can initiate requests acting in both capacities** - so as Service Providers (Asset Owners) or as Agents.

Equally with Release 2.14 we have introduced the ability for Service Providers (Asset Owners) to **specify individualised assets to delegate responsibility to** a nominated agent.

10.2. Conditions of Related Entity

In order for any market provider to take advantage of **delegate responsibility to** a nominated agent, they must fulfil a set of conditions prior;

1. The Asset Owner must be registered on the Portal (with at least one Active User), even if they are not a Unit Owner or acting as an agent on behalf of other service providers OR intended to access the SMP Portal.
2. The Asset Owner's main contact must be notified by their prospective agent to expect email notifications generated by SMP to 'invite them' to accept the agent's nomination request.
3. The prospective agent must possess the Company Registration Number of the service provider in question in order to reference it in the Related Entity process.
4. The Super User/User Admin must assign the Related Entity Role to the Portal Users who are tasked with managing Related Entity

Only when this conditions have been satisfied will an Asset Owner be able to select Asset(s) to delegate for transfer to a prospective agent

10.3. Initiating (Nomination) Requests

10.3.1. Locating a prospective Agent

If you are initiating the request as **a service provider/asset owner** wishing to nominate a particular prospective agent to represent you. To locate and select the agent's company a) select the 'My agents tab' and b) select the 'Find an Agent' custom button to initiate the search

My companies My agents

If you wish to find an Agent to act on behalf of your company, send your request to the Registered Service Provider by clicking the button below

Find an Agent

Active agents

Company Name	Start date	End date	Assigned assets
222 BRECKNOCK ROAD FREEHOLD COMPANY LIMITED	14 Mar 2024	31 Mar 2024	3

Past agents +

10.3.2. Locating a prospective Agent – Entering in the Market Provider Details

The pop-up screen prompting the prospective agent will ask for two mandatory pieces of information a) the Company Registration Number in the search box and b) the *representation*

dates. Please note that without entering a valid number, the process will be aborted. When a valid Registration number is detected, the corresponding Company Details are displayed.

Align Related entity

In order to align a related entity please search for the relative company registration number

Company Registration Number

Please specify the time period during which you will be acting as an agent for the company.

Effective dates

* From * To

Align Related entity

In order to align a related entity please search for the relative company registration number

Company Registration Number

Gyanesh Resources Ltd

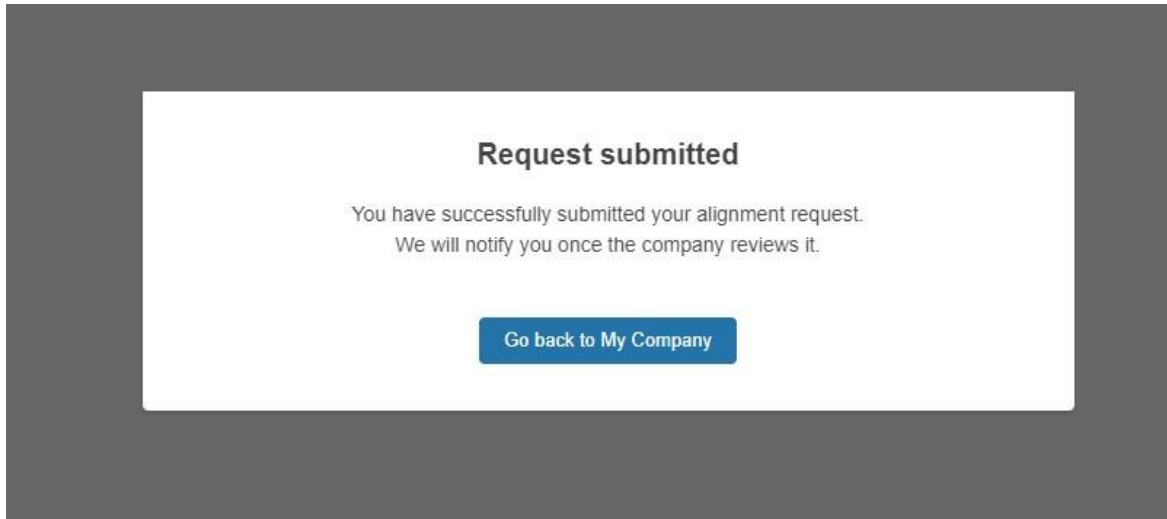
[Clear Search](#)

Please specify the time period during which you will be acting as an agent for the company.

Effective dates

* From * To

10.3.3. Locating a prospective Agent – Confirmation of Submission of Nomination Request



10.3.4. Accepting/Rejecting Nomination Requests

Once the request has been confirmed, the prospective agent's associated Portal Users will be sent an Email Alert prompting them of the pending nomination request. They will be expected to click on the hyperlink in the body of the email or login directly to the SMP Portal to be able to complete the acceptance or rejection of the nomination request exercise.

As the prospective agent, the associated portal user will click on the Related Entity Tab and then proceed to the 'My Companies' Sub Tab – there they will see the New Agent Request notification with the option to Accept or Reject the request. Prior to selecting Accept option they will be required to visit the Terms & Conditions Page to review the content. It is recommended they do this in a different tab on their browser.

The screenshot displays a web interface for a 'New Agent Request'. At the top, there are navigation tabs for 'My companies' and 'My agents', with 'My companies' selected. A 'Log out' button is visible in the top right corner. The main content area is titled 'New Agent Request' and contains the following information:

- Company name:** 123 LIMITED
- Effective dates:** 04-Apr-2027 - 04-Apr-2028

Below the form fields, a message reads: '123 LIMITED is asking you to become their Agent. If you accept this request, you will be duly authorised to act on their behalf with NGESO in line with the Terms & Conditions.' At the bottom of the form, there are two buttons: 'Reject request' and 'Accept request'.

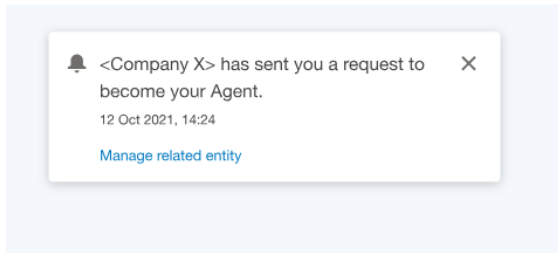
Accepting Nomination: Upon selecting this option the following actions will occur;

- The Asset Owner's associated Users will be notified by Email and via an in portal notification
- They will be expected to login into SMP and replicate the Acceptance of the Terms of Conditions
- Once they have reciprocated and accepted the 'pending agreement' the Status will move to Accepted and the Agreement will officially be formalised on SMP. A record of the Portal User whom accepted the agreement and consented to the Terms & Conditions and the date of consent for both parties will be documented on SMP internally.

Rejecting Nomination: : Upon selecting this option the following actions will occur

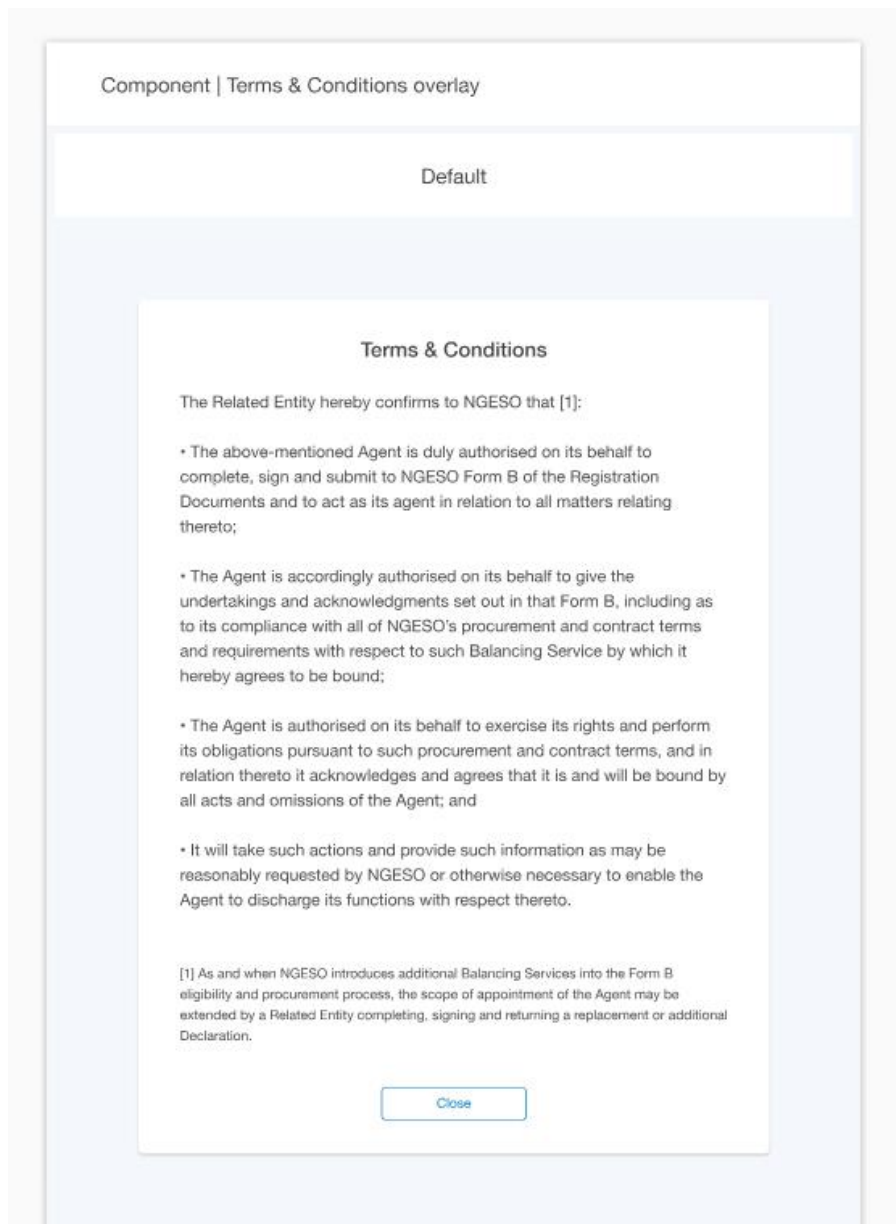
- The Asset Owner's associated Users will be notified by Email of the Rejection Outcome.

10.3.5. In portal notification – Prospective Agent



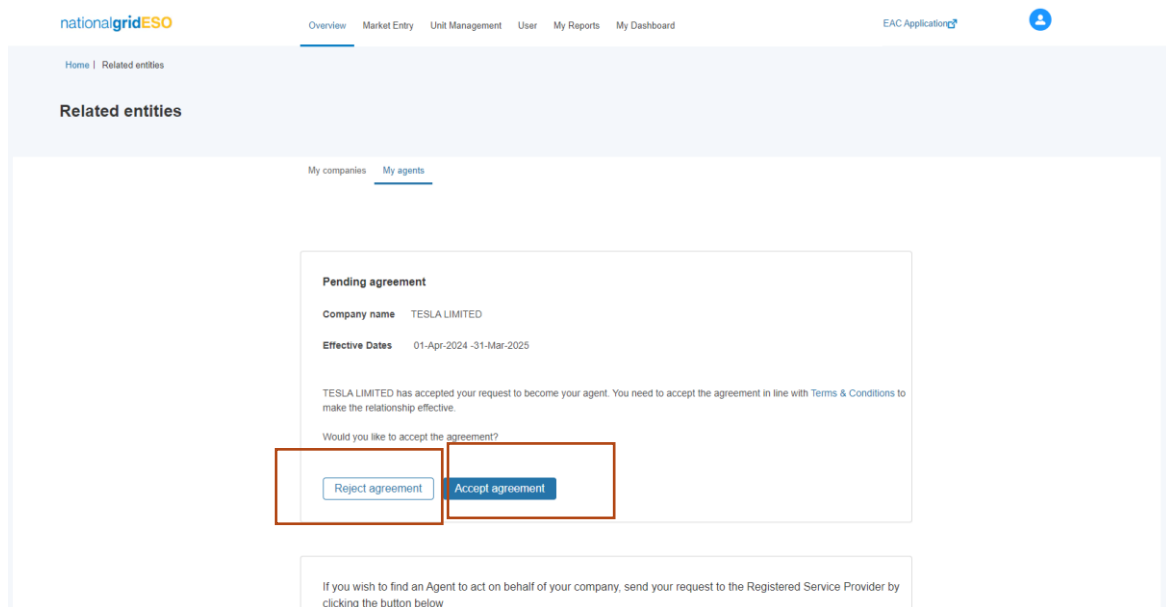
10.3.6. Consenting to the Terms & Conditions – Agreement Copy

The image below provides the description of Terms & Conditions legal text that both parties are expected to adhere to



10.3.7. Pending Agreement Notification – Asset Owner

The Asset Owner’s portal users will be presented with the screen below, when at least one of the User’s in the case of multiple user’s either selects Reject or Accept, the pending agreement notification will remain on the SMP Portal.



Accepting Nomination: Upon selecting this option the following actions will occur;

- The Prospective Agent associated Users will be notified by Email that the Agreement Offer has been ratified and the Agreement is now created
- Once they have reciprocated and accepted the 'pending agreement' the Status will move to Accepted and the Agreement will officially be formalised on SMP. A record of the Portal User whom accepted the agreement and consented to the Terms & Conditions and the date of consent for both parties will be documented on SMP internally.

Rejecting Nomination: : Upon selecting this option the following actions will occur

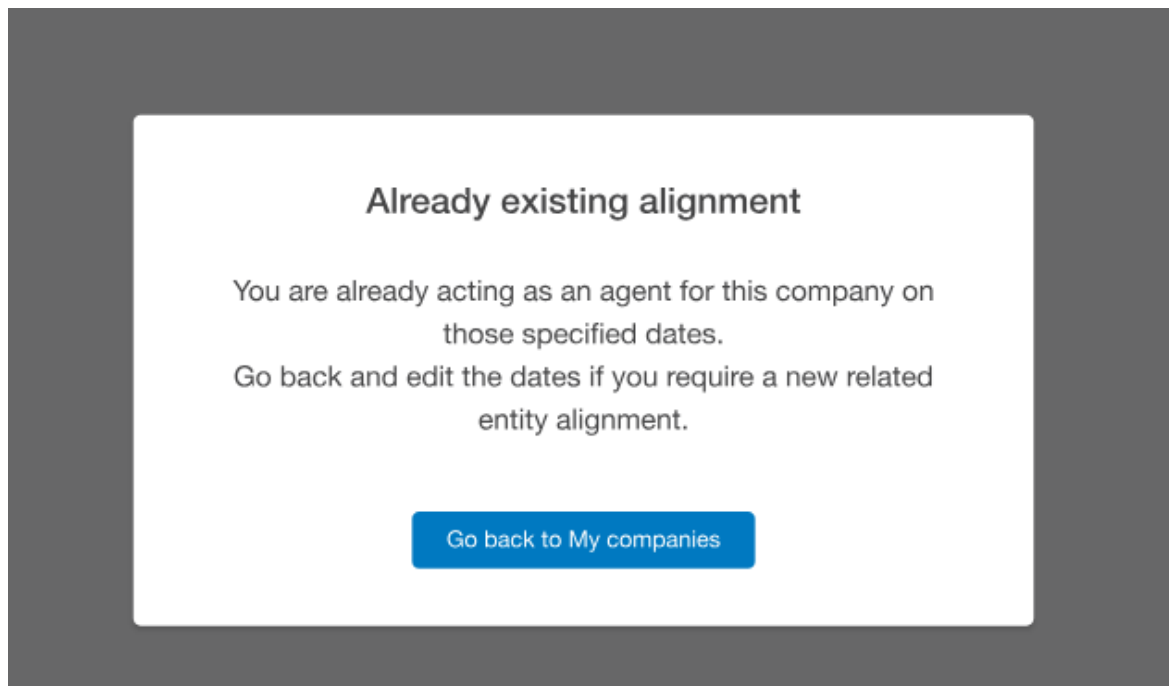
- The Prospective Agent’s associated Users will be notified by Email of the Rejection Outcome.

10.4. Agreement Business Rules

1. A Market Provider cannot submit duplicate nomination requests to the same provider for the **same representation date window**.
2. A Market Provider can however extend an agreement but submitting a **new request** with a **different set of dates with the same provider**
3. A Market Provider cannot submit multiple nomination requests to different providers with different or the same representation date window.
4. There is no longer a cap on the number of agents an asset owner can have at the same time.
5. Both parties have to accept the agreement and consent to the terms and conditions before the agreement is formalised on SMP. If either party fails to accept or reject, the agreement remains in 'pending' state.
6. If either party rejects the agreement, it is made redundant and the process and the agreement exchange is terminated.

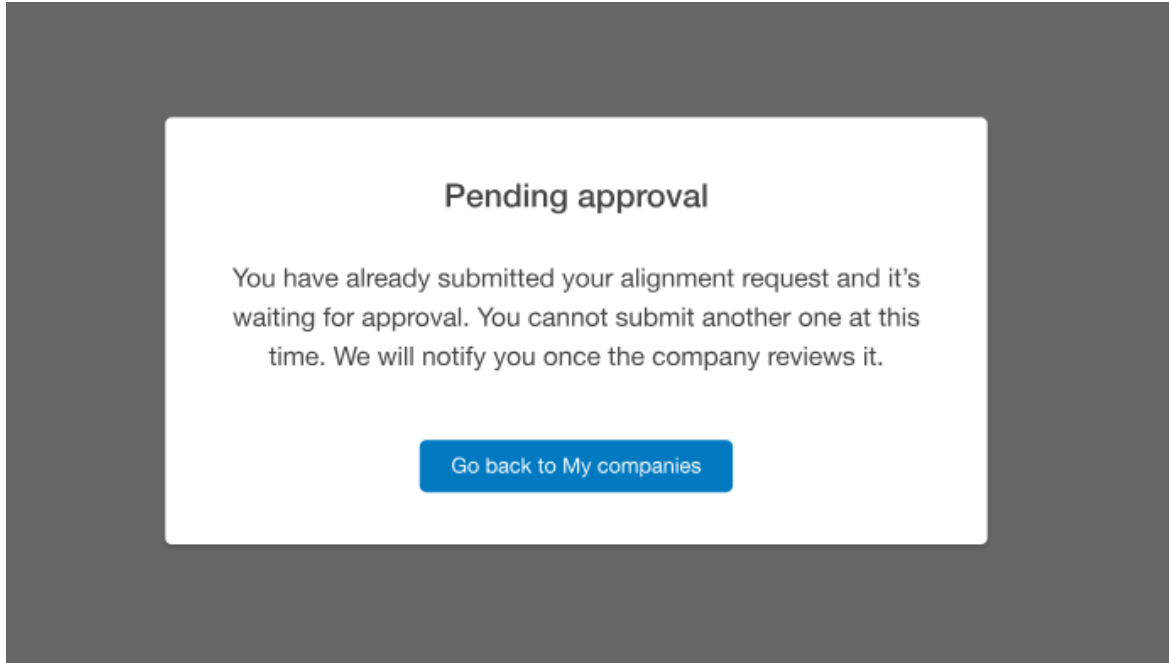
10.4.1. Notification that an existing Agreement is in place

If a Market Provider's Portal User attempts point 1 above during the nomination stage, this message will appear on screen.

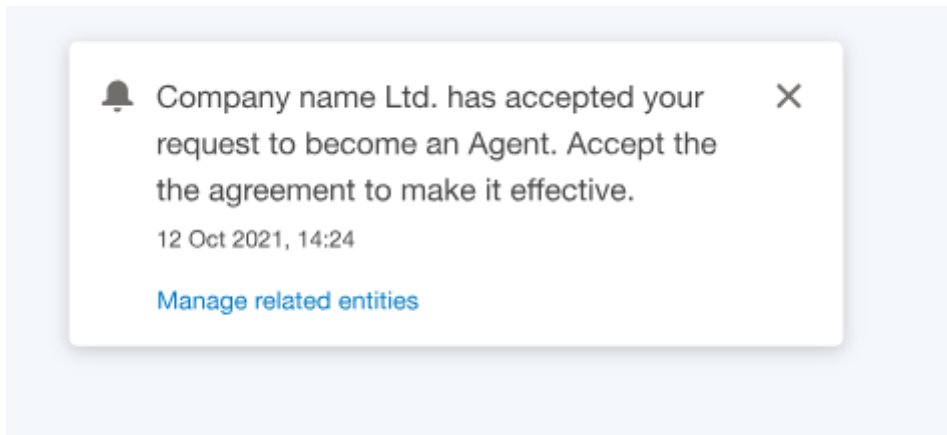


10.4.2. Notification that one of the parties is still pending approval

If either of the Market Provider's Portal Users are yet to accept or reject the nomination request, this message will appear on screen if they attempt to initiate a duplicate request to the same Market Provider for the same representation dates. This will block any potential duplicate requests being 'created' on SMP.



10.4.3. In portal notification – Prospective Agent



10.4.4. Confirmation of Agreement in Place – Asset Owner’s view

Once the Related Entity Agreement has been established between both parties (accepted), then both parties can log into SMP and view evidence of the Agent/Asset Owner’s Agreement Details including the Company Name, the Representation Start and End Date and the overall number of assets assigned. (The transfer/delegation of assets are covered in the next Chapter)

Once an Agreement has expired, the Agent in question will appear under the ‘Past Agents’ section.

My companies **My agents**

If you wish to find an Agent to act on behalf of your company, send your request to the Registered Service Provider by clicking the button below

[Find an Agent](#)

Active agents

Company Name	Start date	End date	Assigned assets
222 BRECKNOCK ROAD FREEHOLD COMPANY LIMITED	14 Mar 2024	31 Mar 2024	3

Past agents +

10.4.5. Confirmation of Agreement in Place – Prospective Agent’s view

nationalgridESO

Overview Market Entry Unit Management User My Reports My Dashboard EAC Application

Home | Related entities

Related entities

My companies **My agents**

If you wish to act on behalf of another company as their Agent, send your request to the Registered Service Provider by clicking the button below

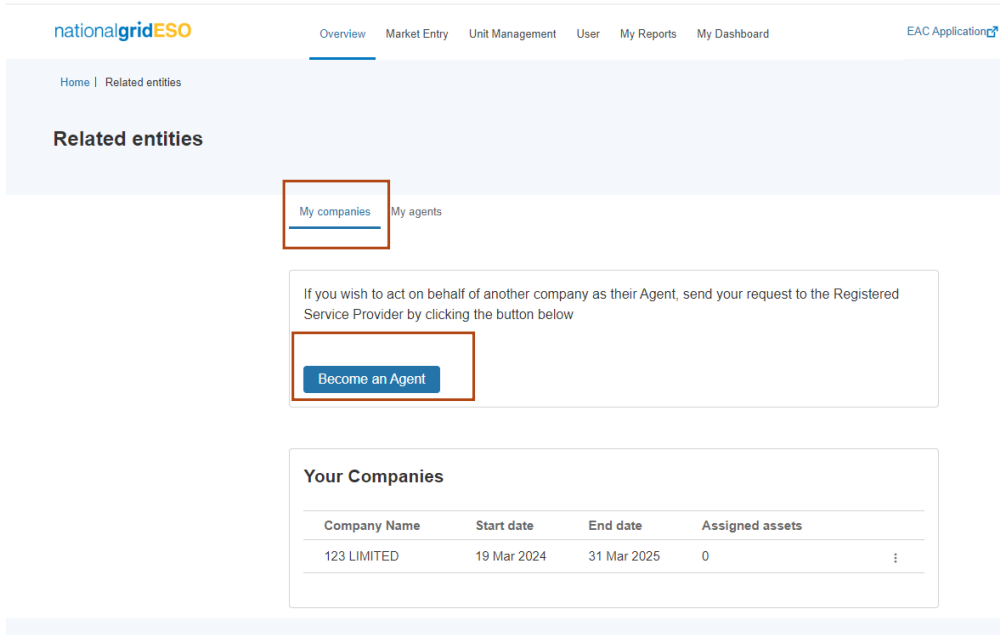
[Become an Agent](#)

Your Companies

Company Name	Start date	End date	Assigned assets
123 LIMITED	19 Mar 2024	31 Mar 2025	0

10.5. Locating a prospective Asset Owner/Service Provider

If a Market Provider is acting as a prospective Agent wishing to nominate an asset owner/service provider as their Related Entity, the steps they adopt are identical to those outlined under the section outlined for "Locating a prospective agent" instead, the Market Provider will select the **"Become An Agent"** option under the **'My Companies'** Tab.



nationalgridESO

Overview Market Entry Unit Management User My Reports My Dashboard EAC Application

Home | Related entities

Related entities

My companies My agents

If you wish to act on behalf of another company as their Agent, send your request to the Registered Service Provider by clicking the button below

[Become an Agent](#)

Your Companies

Company Name	Start date	End date	Assigned assets
123 LIMITED	19 Mar 2024	31 Mar 2025	0



10.6. Confirmation Email Alerts

Outlined below are the various Email Alert notifications that are issued to Market Providers throughout the Related Entity Process steps.

10.6.1. Confirmation Email Alert Template 1

Request initiated by Service Provider/Asset Owner

FW: [EXTERNAL] Sandbox: SMP: Related Entities: Request to become PALETTE DINING LIMITED's agent

 Laila Zaghari
To:  Laila Zaghari

21/02/2024

Related Entity request to become PALETTE DINING LIMITED's agent

Company PALETTE DINING LIMITED has sent you a request to become their Agent.

Please review request using the button below.

[REVIEW AGENT REQUEST](#)

Or Copy this Link and paste it into your browser to login to SMP Portal and navigate to 'My Companies' tab.

<https://nationalgrideso--smpqa.sandbox.my.site.com/singleMarketsPlatform/s/related-entities>

Please note that this link will expire in 14 days. If no action is taken, then the request is cancelled.


Thank you,

National Grid (ESO) – Single Markets Platform

How to get in touch:

commercialoperations@nationalgrideso.com

<https://www.nationalgrideso.com/industry-information/balancing-services/single-markets-platform>

 nationalgridESO

This e-mail, and any attachments are strictly confidential and intended for the addressee(s) only. The content may also contain legal, professional or other privileged information. If you are not the intended recipient, please notify the sender immediately and then delete the e-mail and any attachments. You should not disclose, copy or take any action on the information contained in this e-mail. If you have received this e-mail in error, please notify the sender immediately by e-mail. You may report the matter by contacting us via our UK Contacts Page or our US Contacts Page (accessed by clicking on the appropriate link). Please ensure you have adequate virus protection before you open or detach any documents from this transmission. National Grid plc and its affiliates do not accept any liability for viruses. An e-mail reply to this address may be subject to monitoring for operational reasons or lawful business practices. For the registered information on the UK operating companies within the National Grid group please use the attached link: <https://www.nationalgrid.com/group/about-us/corporate-registration>

10.6.2. Confirmation Email Alert Template 2

Request initiated by Prospective Agent

Delete | Respond | Teams | Quick Steps | Move

FW: [EXTERNAL] Sandbox: SMP: Related Entities: Request to act as agent for 222 CONTRACTS LTD



Laila Zaghari
To Laila Zaghari



nationalgridESO

26/03/2024

Related Entity Agent request to act as agent for 222 CONTRACTS LTD

Company 99 LTD has sent you a request to become your Agent.

Please review request using the REVIEW AGENT REQUEST Button below.

[REVIEW AGENT REQUEST](#)

Or Copy this Link and paste it into your browser to login to SMP Portal and navigate to 'My Agents' tab.

<https://nationalgrideso--smpapiqa.sandbox.my.site.com/singleMarketsPlatform/s/related-entities>

Please note that this link will expire in 14 days. If no action is taken, then the request is cancelled

Thank you,

National Grid (ESO) – Single Markets Platform

How to get in touch:

commercialoperations@nationalgrideso.com

10.6.3. Confirmation Email Alert Template 3

Request Nomination Rejected

FW: [EXTERNAL] Sandbox: SMP: Related Entities: Agent Request Rejected.



Laila Zaghari
To Laila Zaghari

CAUTION: This email originated from outside of the organisation. Do not click links or open attachments.



nationalgridESO

15/03/2024

Related Entity Agent Request: Rejected.

Company RUDRA LIMITED has Rejected your agent request. To select an alternative agent to re-align with, please click the link below to

[LOGIN TO SMP](#)

Or Copy this Link and paste it into your browser to login to SMP Portal.

<https://nationalgrideso--shareddev.sandbox.my.site.com/singleMarketsPlatform/s/related-entities>

Thank you,

National Grid (ESO) – Single Markets Platform

How to get in touch:

commercialoperations@nationalgrideso.com

10.6.4. Confirmation Email Alert Template 4

Reminder Alert to take action on the nomination request

FW: [EXTERNAL] Sandbox: Reminder to take action on your Pending Related Entity Agreement Request with Chinnu's Mobiles



Laila Zaghari
To Laila Zaghari

Reply Reply All Forward

Mon 08/04/2024 13:4

nationalgridESO

06/03/2024

This is a gentle reminder to review all your pending Related Entity requests pertaining to your account. Please note that the request will expire after 14 days from the original date the request was submitted. After this period any further requests will have to be re-initiated. Please click the link below to take you to the SMP Portal.

[LOGIN TO SMP](#)

Or Copy this Link and paste it into your browser to login to SMP Portal.

<https://nationalgrideso--smpqa.sandbox.my.site.com/singleMarketsPlatform/s/related-entities>

Thank you,

National Grid (ESO) – Single Markets Platform

How to get in touch:

10.6.5. Confirmation Email Alert Template 5

Confirmation Email – Agreement Accepted

FW: [EXTERNAL] Sandbox: SMP: Related Entities: Agent Request Accepted



Reply Reply All Forward

Mon 08/04/2024 13:45

18/03/2024

Related Entity Agent Agreement: Accepted.

Company 444 ACCOMMODATION LTD has accepted your agent request. Please click the link below to take you to the SMP Portal.

[Review agent request](#)

Or Copy this Link and paste it into your browser to login to SMP Portal.

<https://nationalgrideso--smpqa.sandbox.my.site.com/singleMarketsPlatform/s/related-entities>

Thank you,

National Grid (ESO) – Single Markets Platform

How to get in touch:



commercialoperations@nationalgrideso.com



~~https://nationalgrideso.com/external-information/related-entities-agent-requests~~ To: Subhrajit Sakhar / Subhrajit.Sakhar@nationalgrid.com

10.6.6. Confirmation Email Alert Template

Confirmation Email – Agreement Rejected


FW: [EXTERNAL] Sandbox: SMP: Related Entities: Agreement Rejected to become 222 BRECKNOCK ROAD FREEHOLD COMPA...

 Laila Zaghari
To  Laila Zaghari

[Reply](#) [Reply All](#) [Forward](#)  

Mon 08/04/2024 13:50

CAUTION: This email originated from outside of the organisation. Do not click links or open attachments unless you recognise the sender and know the content is safe. If you suspect this email is malicious, please use the 'Report Phish' button.



13/03/2024

Related Entity Agent Agreement Rejected.

Company 222 BRECKNOCK ROAD FREEHOLD COMPANY LIMITED has rejected the agreement for you to become their Agent. To select an alternative agent to re-align with, please click the link below to take you to the SMP Portal.

[LOGIN TO SMP](#)

Or Copy this Link and paste it into your browser to login to SMP Portal.

<https://nationalgrideso--smpqa.sandbox.my.site.com/singleMarketsPlatform/s/related-entities>

Thank you,

10.7. Delegating Asset(s) for Transfer

The section below outlines the steps required by the Asset Owner/Service Provider to select and delegate or transfer the asset(s) to their respective Prospective Agent.

10.8. Transfer of Asset(s) Business Rules

7. An Asset Owner cannot transfer or delegate any assets unless they have entered into an Agreement in accepted state
8. The Asset(s) will only become available to the Prospective Agent on **Day 1** of the representation period.
9. It is recommended that when setting the representation dates, the asset owner and prospective agent must allow for **sufficient lead or onboarding time** to ensure the agent is in a position to form a new Unit and prequalify successfully prior to auction timeframes.
10. An Asset Owner is only permitted to transfer or delegate responsibility of asset(s) within the agreement representation dates, if the asset owner wishes to transfer an asset beyond those dates, they will have to establish a new agreement with the same party.
11. Only Asset Owners can transfer or delegate responsibility of asset(s) that they own within their own portfolio
12. If an Asset's Effective From Date is set in the future – therefore beyond the agreement representation dates, the asset is prohibited from being available for transfer or delegation within the context of that agreement
13. If an Asset is committed to an existing Unit or Unit(s) in Accepted State then the Asset is prohibited from being available for transfer or delegation and will be marked as 'Requires' Global Versioning' to effectively release the Asset from the existing Units.
14. Following successful completion of the Global Versioning exercise, the Asset will be made available for transfer.
15. There may be instances where there are missing parameter data on existing assets selected for transfer, if the missing parameter data breaches ESO Business Units validation rules, then the Asset is prohibited from being available for transfer or delegation until the data is rectified. In this instance an error message will appear and the onus will be on the Asset Owner to liaise with the Contracts Team to resolve.
16. Once the Asset(s) are successfully transferred, the Asset Owner will not be able to leverage them to form Units or prequalify throughout the duration of the agreement. They will however be able to view the Asset(s) on SMP as a point of reference.

10.8.1. Selection of the Agent

The first step an asset owner should take is to identify the Agent they wish to delegate the asset to under the list of agents, then navigate to the **three drop down buttons** and select the option to **'manage assets'**

The screenshot shows the 'Related entities' page with the 'My agents' tab selected. A 'Find an Agent' button is highlighted. Below it, a table titled 'Active agents' lists companies with their start and end dates and assigned assets. A dropdown menu is shown next to the 'Assigned assets' column for the first row, with 'Manage agent assets' selected.

Company Name	Start date	End date	Assigned assets
TESLA LIMITED	19 Mar 2024	31 Mar 2025	0
222 BRECKNOCK ROAD FREEHOLD COMPANY LIMITED	14 Mar 2024	31 Mar 2024	3

Company name	Start date	End date	Assigned assets
Company name long name Ltd. that goes onto two lines	15 Feb 2022	15 Feb 2023	0
Company name Ltd.	15 Feb 2022	15 Feb 2023	2
Company name Ltd.	15 Feb 2022	15 Feb 2023	999

10.8.2. Selection of the Asset(s)

The next step is to select the 'assign' assets button

The screenshot shows the 'Manage agent assets' page for '123 LIMITED'. It instructs the user to select assets for their active agent. A box contains the text 'All the assets included in the table below will be managed by your Agent.' and an 'Assign assets' button is highlighted.

10.8.3. Selection of the Asset(s) – identification of asset(s)

The next step is to select the asset(s) in question from the list of assets owned by the Asset Owner. All assets should display, however those assets committed to at least one or more Units in Accepted State will have a column marker which indicates the Asset requires Global Versioning to release it from its current Unit or Units. To select the asset that is available, simply check the box in the first column. When all the asset(s) are selected the 'Confirm' button should be selected.

Agent assets

All the assets included in the table below will be managed by your Agent.

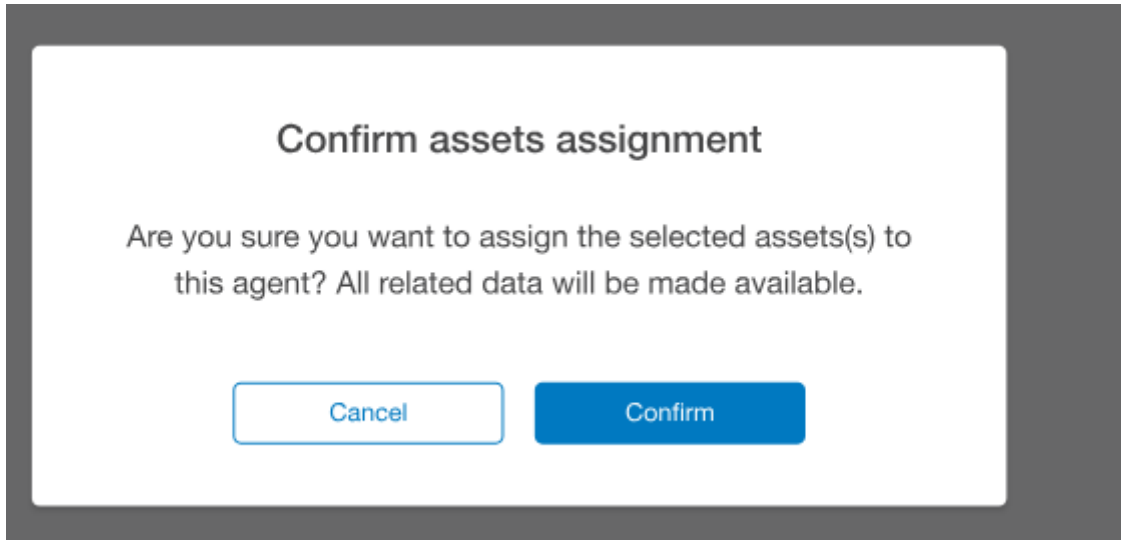
Q Search assets

8 assets

	Asset Name	Asset ID	Asset Type	Generation	Demand	
<input type="checkbox"/>	Test 0412	AST-7151	Generation Unit	12 MW		<input type="button" value="Go to Global Versioning"/>
<input type="checkbox"/>	Test 2901	AST-7159	Generation Unit;Demand Unit	12 MW	12 MW	<input type="button" value="Go to Global Versioning"/>
<input type="checkbox"/>	Oslo	AST-7171	Generation Unit;Demand Unit	5 MW	5 MW	<input type="button" value="Go to Global Versioning"/>
<input type="checkbox"/>	Madrid	AST-7168	Generation Unit;Demand Unit	5 MW	5 MW	<input type="button" value="Go to Global Versioning"/>
<input type="checkbox"/>	Paris	AST-7166	Generation Unit;Demand Unit	5 MW	5 MW	<input type="button" value="Go to Global Versioning"/>
<input checked="" type="checkbox"/>	Venice	AST-7167	Generation Unit;Demand Unit	5 MW	5 MW	
<input type="checkbox"/>	Rome	AST-7170	Generation Unit;Demand Unit	5 MW	5 MW	
<input type="checkbox"/>	Subro Asset UAT2	AST-7163	Generation Unit;Demand Unit	60 MW	67 MW	<input type="button" value="Go to Global Versioning"/>

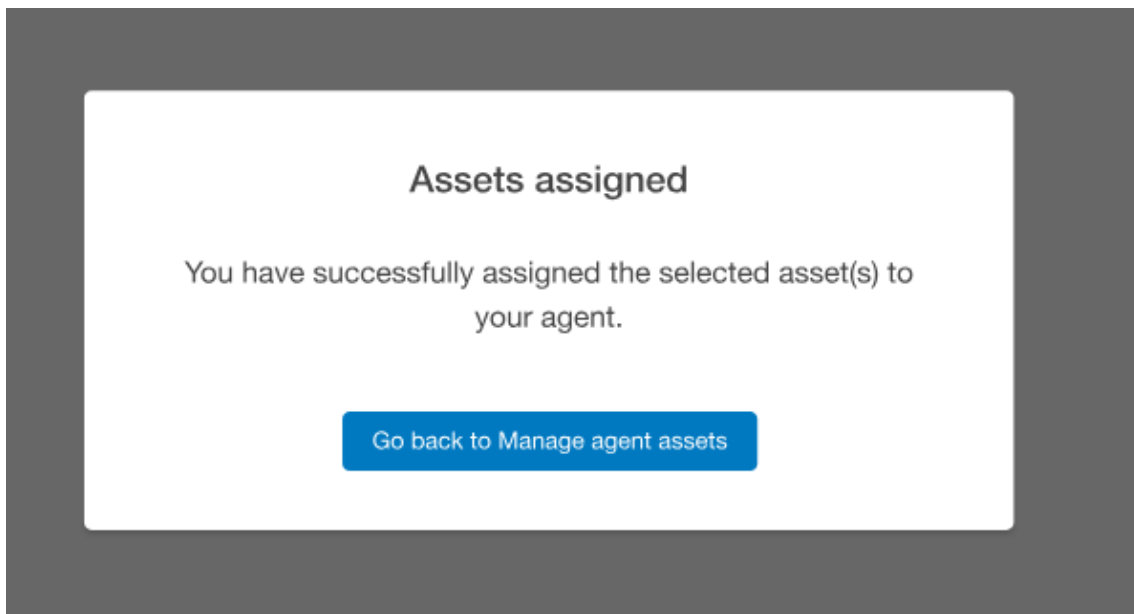
10.8.4. Confirmation notification – selection of asset(s)

An onscreen notification will display to acknowledge that the user wishes to proceed with the transfer, there is an option to abort the process by selecting 'cancel'



10.8.5. Confirmation decision – selection of asset(s) completed

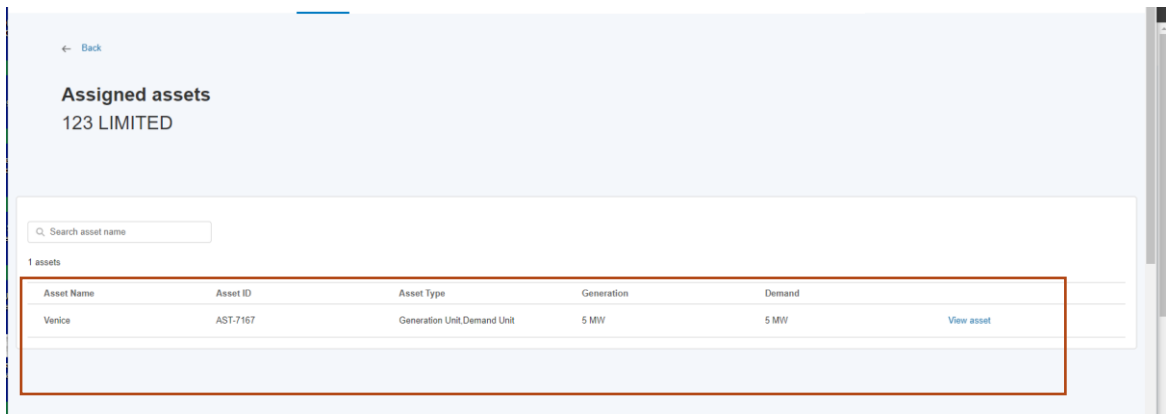
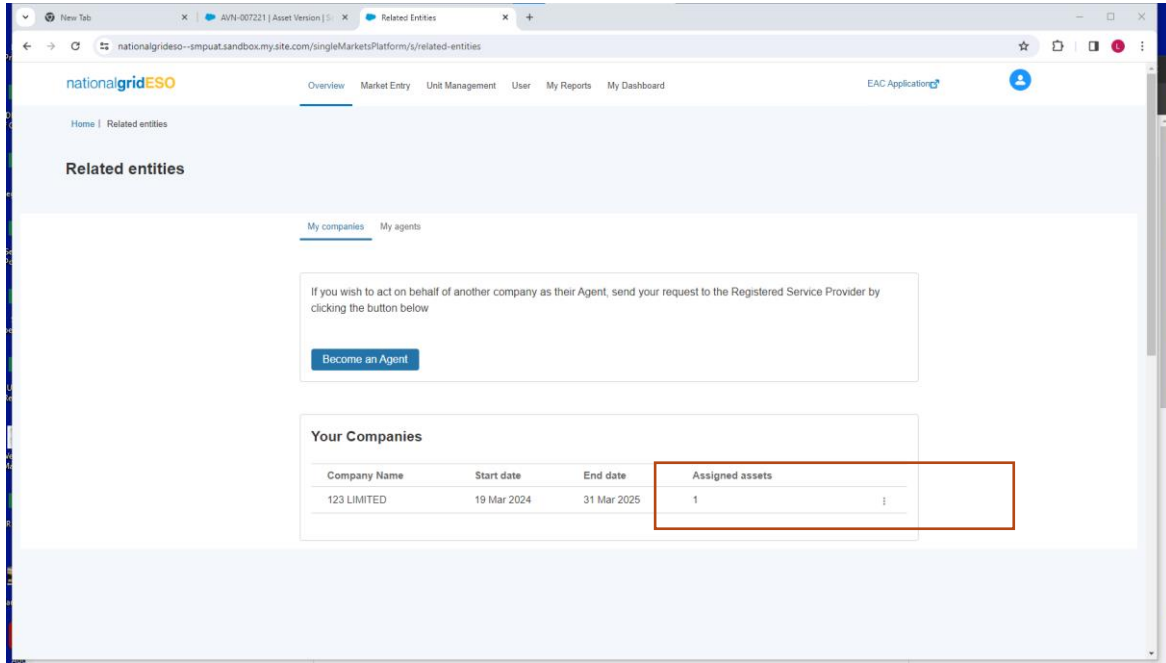
If 'Confirm' is selected, then an onscreen notification will appear to confirm that the asset(s) have been transferred.



10.8.6. Visibility of Transferred Assets

As mentioned previously, asset(s) are only made available to the prospective agent on Day 1 of the representation Effective From Date, however prior to this date the agent can view the number of assigned assets under the Your Companies listing under the Related Entity Section of SMP.

To view the actual asset on Day 1, Portal Users should navigate to the Asset Tab under Unit Management, where the Asset Tile will display and be available for Unit alignment.



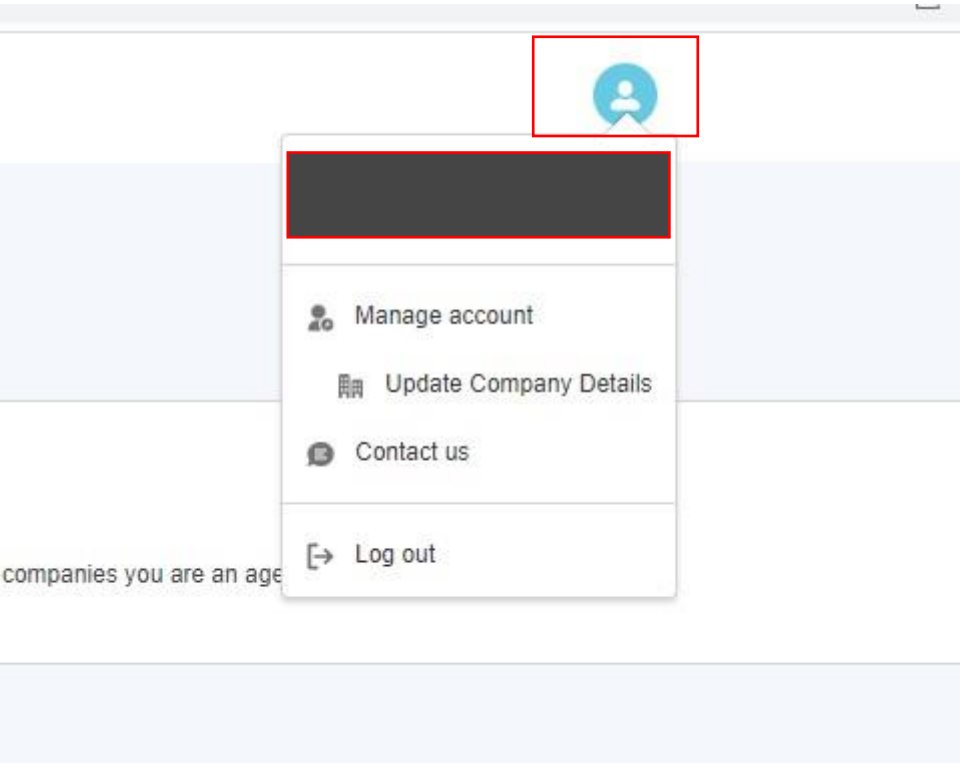
11. Providing Financial Banking Details

11.1. Recording Financial Payment Details

A provider should supply their Financial Payment information on the Portal under Company Details section of the portal. Moving forward all providers will be expected to provide and update their financial details on the SMP Portal in order to ensure the most accurate banking details are captured.

A portal user must have the Finance Manager Role in order to access this feature. Click on the Avatar icon or navigate to the My Company Details Tile on the Overview Tab/Landing Page.

Figure 14.1: Accessing Company Details Screen



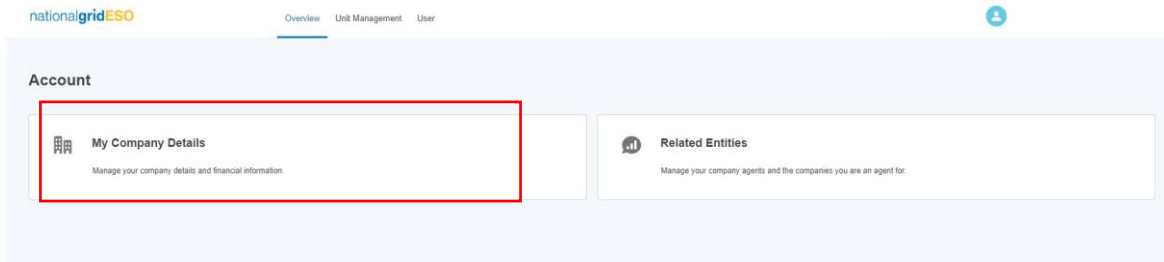
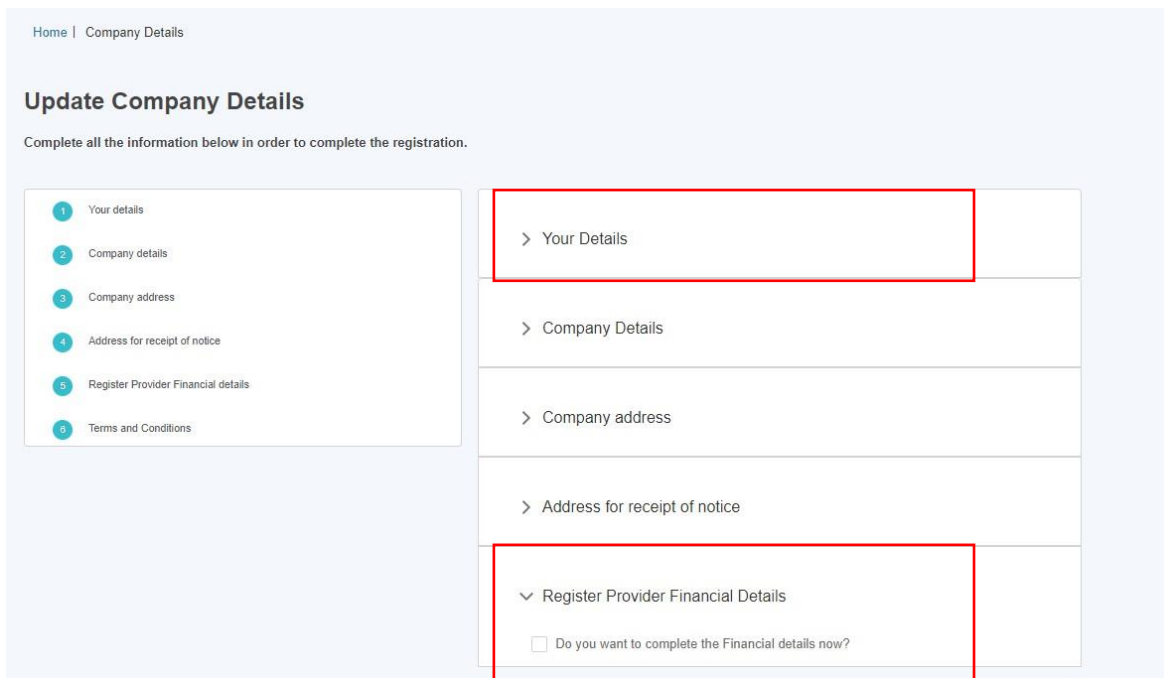


Figure 14.1: Update Company Details Screen



Select the 'Registered Provider Financial Details' subsection as illustrated in Figure 14.1.

Figure 14.1: Update Company Details Screen – populate details.

▼ Register Provider Financial Details

Do you want to complete the Financial details now?

* Bank name
Santander


* Account name
123 Limited

* Sort Code
211223

* Account Number
34875683745

IBAN
123

VAT Number
123

Effective from Date
19-Sept-2022 

Currency
Pounds ▼

Please select and upload one of the following accepted banking evidence.

Note: Online banking screenshots must include company name, internet address bar and date of origin.

* Bank Evidence Type
Bank statement dated within the last six months ▼

* Bank Evidence Type
Bank statement dated within the last six months ▼

* Upload Evidence

Upload Files Or drop files

log in qa 2.0.jpg

Terms & Conditions

By submitting this form, you make the following declarations:

That it has complied with all laws intended to prohibit or restrict anti competitive practices relevant to its participation in activities associated with procurement by NGESO of Balancing Services;

That neither it nor any Affiliate has engaged in any market manipulation in relation to the wholesales energy markets; That neither it nor any Affiliate has done anything which would constitute a breach of the Bribery Act 2010 with a view to influencing the outcome of any procurement activity by NGESO in relation to Balancing Services; and

That neither it nor any Affiliate has offered to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any employee of NGESO.

▼

I agree to the Terms and Conditions

Cancel Submit

In order to save the details provided and the Submit button to be 'released' - it is mandatory to also upload the supporting evidence and answer the fields marked with a red asterisk. Finally, the checkbox under Terms & Conditions must be checked.

In order to update any financial details post submission, it is essential that the mobile number stored in the Your Details is populated.

Terms & Conditions

By submitting this form, you make the following declarations:

That it has complied with all laws intended to prohibit or restrict anti competitive practices relevant to its participation in activities associated with procurement by NGESO of Balancing Services;

That neither it nor any Affiliate has engaged in any market manipulation in relation to the wholesales energy markets; That neither it nor any Affiliate has done anything which would constitute a breach of the Bribery Act 2010 with a view to influencing the outcome of any procurement activity by NGESO in relation to Balancing Services; and

That neither it nor any Affiliate has offered to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any employee of NGESO.

I agree to the Terms and Conditions

Cancel

Submit

Figure 14.2: Updating Financial Details – Contact Details Validation

▼ Your Details

First Name
Laila

Last Name
Zaghari

Company email
[Redacted]
Your company email address

* Mobile number
United Kingdom (44) ▼ 1738456000

Landline number
Country code ▼

11.2. Accessing Contract Data

As of Release 2.7, Portal Users are able to view Auction Result Data in the shape of 'Contract Records for each of their prequalified Units.

- The resulting data will be accessible in a Report Format and each Auction Result is grouped under its respective Unit.
- To navigate to an individual Contract, the Portal User will have to possess the Unit Manager Role.
- They will then navigate to the My Reports Tab on the navigation bar.
- They will see a listing of Report Templates, they must hover to the one entitled 'Contracts' and then proceed to click on the 'Contracts' Report Name link as illustrated in the figure below.

The image displays two screenshots of the nationalgridESO portal's 'My Reports' section. The top screenshot shows the 'All Reports' view with a table of reports. The 'Contracts' report name is highlighted with a red box. The bottom screenshot shows the 'Recent' view with the same 'Contracts' report highlighted.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Contracts	Report created for Contract Management.	Contracts	System Admin	16/06/2023, 10:23	
Private Reports	My Alignments		Balancing Services	System Admin	16/12/2022, 10:28	
All Reports	My Asset Registrations Report		Balancing Services	System Admin	16/12/2022, 10:28	
FOLDERS	My Prequalification Application		Balancing Services	System Admin	16/12/2022, 10:28	
All Folders	My Unit Registrations Report		Balancing Services	System Admin	16/12/2022, 10:28	

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Contracts	Report created for Contract Management.	Contracts	System Admin	16/06/2023, 10:23	

11.3. Accessing Contract Data (cont.)

An itemised list view of each Contract Record will be displayed, to review the details of each individual Contract (Auction Result) the Portal User will need to click on the Contract ID (1st

Column) as displayed in the illustration below. This will 'open' the individual record with the granular details or output.

nationalgridESO

Overview Market Entry Unit Management User My Reports

Report: Delivery Contracts
Contracts
Report created for Contract Management.

Enable Field Editing Search Add Chart Filter Refresh Export

Total Records	Total Volume	Total Price	Total Total Price
1	0.00	0.00	0.00

ContractID	Commercial ContractID: Parent ContractID	Commercial Account: Account Name	Delivery Account: Account Name	UnitID	Unit: Unit Number	Contract Start	Contract End	Service
1	DC-00000001							
2								

nationalgridESO

Overview Market Entry Unit Management User My Reports

Delivery Contract
DC-00000001

Printable View Submit for Approval

Chatter isn't enabled or the user doesn't have Chatter access.

DETAILS RELATED

ContractID
DC-00000001

Contract Start

Contract End

Volume

Commercial ContractID
00000001

Commercial Account

Delivery Account

Service

Unit of Measurement

Price

Status

Total Price
0.00

Unit

To navigate back to the Home Page simply click on the Overview Tab on the navigation bar.

11.4. Market Entry Landing Page

The Market Entry page provides a dashboard view of the Units the user has submitted, with components displaying the percentage of accepted units, a bar chart on Units by Status, a list of most recently submitted units with their Unit IDs and a table view of all Units submitted.

The screenshot shows the Market Entry dashboard with the following components:

- Navigation:** nationalgridESO logo, Overview, Market Entry (active), Unit Management, My Reports, and a user profile icon.
- Market Entry Summary:**
 - Accepted Units:** A donut chart showing 1 / 5 units accepted (20.00% of total). A button below indicates "+ 5 new units".
 - Qualification Status:** A bar chart showing 3 Draft, 1 Accepted, and 1 Rejected units.
 - Last Submission:** A list of recent submissions: /08 Dec 2022, ABC-123/07 Dec 2022, and ABC-123/06 Dec 2022.
- Your qualifications:** A search bar and a table of 5 units.

Unit Name	Unit ID	Asset	Generation Capacity(MW)	Demand Capacity(MW)	Markets	Services	Submission Date	Qualification Status
Test RDP 0812		1	50		RDP MW Dispatch	1	08 Dec 2022	Draft

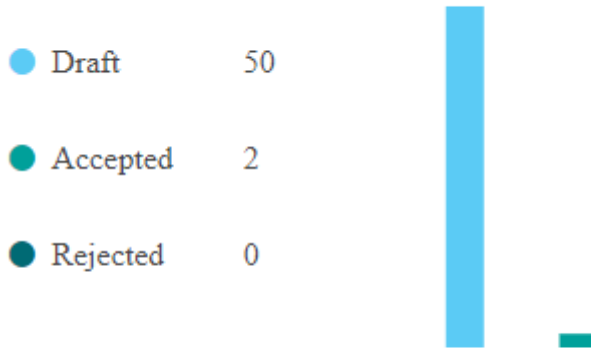
The Accepted Units component shows the number of Units in total with a subdivision showing the number Accepted and this expressed as a percentage. In the bottom left it also displays the number of Units submitted in the last week.

This close-up view of the Accepted Units component shows:

- Accepted Units:** A donut chart with 1 unit accepted (20.00% of total).
- Accepted / Available:** 1 / 5.
- + 5 new units:** A button highlighted with a red box, indicating the number of units submitted in the last week.

The Registration Status component breaks down the Units by Status into bars for Draft, Accepted and Rejected.

Registrations Status



The Last Submission component displays Unit ID and the date it was submitted.

Last Submission	
Unit Id	Submission Date
RDP-789/13	Dec 2022
ABC-123/07	Dec 2022
ABC-123/06	Dec 2022

Your registrations table displays Unit's row-by-row, with the following information:

- Unit Name
- Unit ID
- Number of Assets the Unit is aligned to.

- Generation & Demand Capacity
- Markets the Unit is applicable for
- The number of Services the Unit is prequalified for.
- Date the Unit was submitted.
- Status

Unit Name	Unit ID	Asset	Generation Capacity	Demand Capacity	Markets	Services	Submission Date	Registration Status
RDP 123 NGED		1	23	0	RDP MW Dispatch	1 ●	02 Aug 2023	● Draft
Test Unit 2707	abc-1234	1	0	0	Balancing Services	4 ●	01 Aug 2023	● Draft
Unit 159		1	0	45	Demand Flexibility Service	0 ●	01 Aug 2023	● Draft
ukpn asset		1	55	0	RDP MW Dispatch	1 ●	01 Aug 2023	● Draft

The user is also able to access the following pages by clicking on the 3 dots at the end of the row.

- Pre-qualify for Services.
- View Details
- Create new version (Accepted Units only)

Balancing Services	1 ⓘ	13 Dec 2022	● Accepted	⋮
RDP MW Dispatch	1 ⓘ	06 Dec 2022	●	<ul style="list-style-type: none"> Pre-qualify for Services View Details Create new version

The table also has a search function for the user to filter their units by Unit Name or ID. Enter the Name or ID into the search bar and click 'Search' to filter the table.

Q DFS-123 ✕ Search

5 Units

Unit Name	Unit ID	Asset	Generation Capacity(MW)
Test Demand Flexibility 0612	DFS-123	1	0

12. Reports

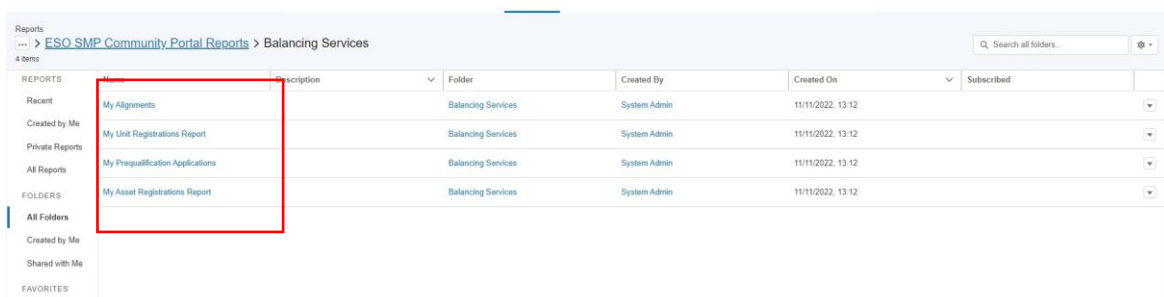
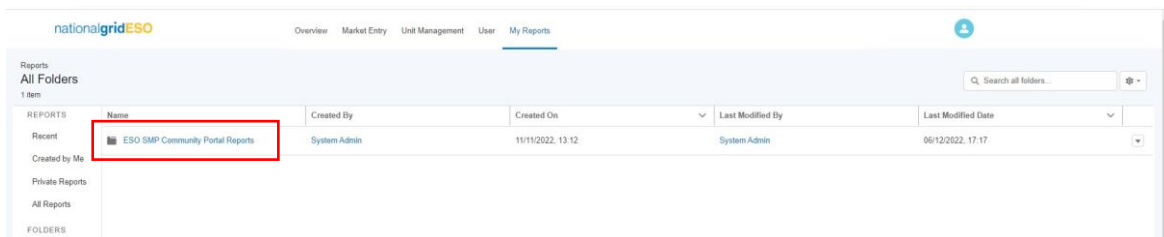
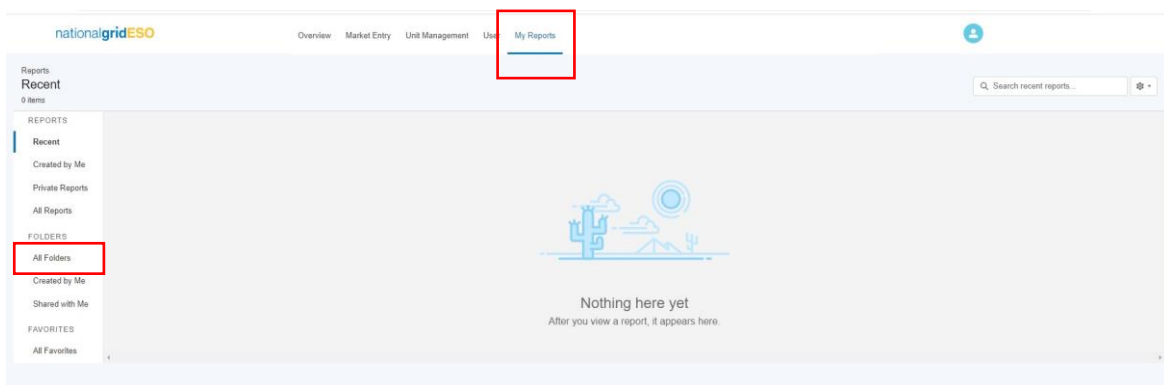
The Portal Report Tools have been introduced to allow portal users to track data related to their SMP Portfolio of Units and Assets. A set of pre-defined Reporting Templates have been curated and are designed to report on data and metrics in real time. The following chapter will run through how to access and use each of the reports.

Please note that only Users with the Unit Manager Role are able to view and run reports.

12.1. Locating Reports

Figure 16.1 Report Folders

To access all reports, navigate to the My Reports Tab, then the All Folders option on the left hand side list of options. All the current Report Templates for Balancing Services are stored in the ESO SMP Community Portal Reports Folder. Under this top level folder, the individual reports are listed.



12.2. My Asset Registrations Report

Figure 16.2: My Assets Dashboard Metric

This metric is a graphic representational summary of the total number of assets registered under your Account.

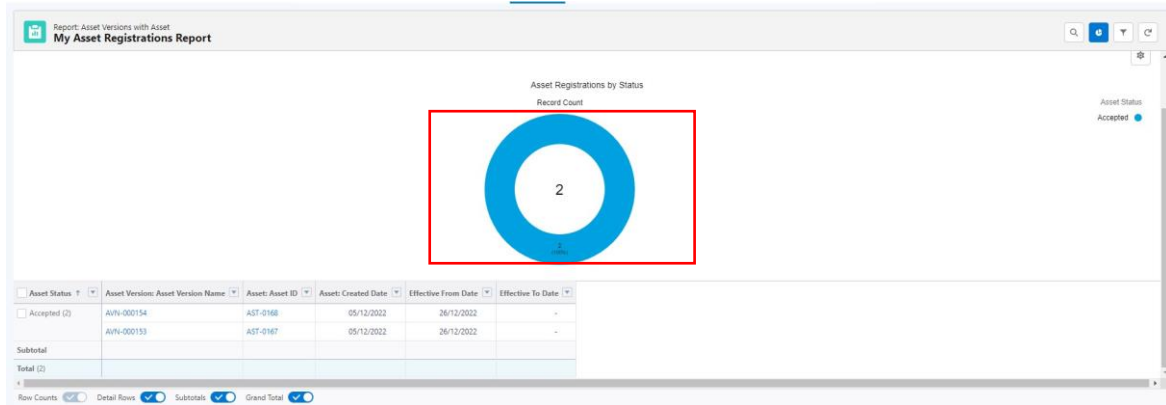


Figure 16.3: My Assets Reporting Filters & Itemised Table

The reporting table provides an itemised breakdown of each of the assets registered with their respective Asset Ref ID, their parent Asset ID and their effective start and end dates. Please note that the Asset ID refers to the 'parent asset' so where an asset is subject to versioning it will always be tethered to its parent asset regardless of the number of versions.* (Asset Versioning Functionality has yet to be released) The portal user is able to navigate directly to the individual Asset or the Parent Asset Records if they want to view the granular level of detail or data.

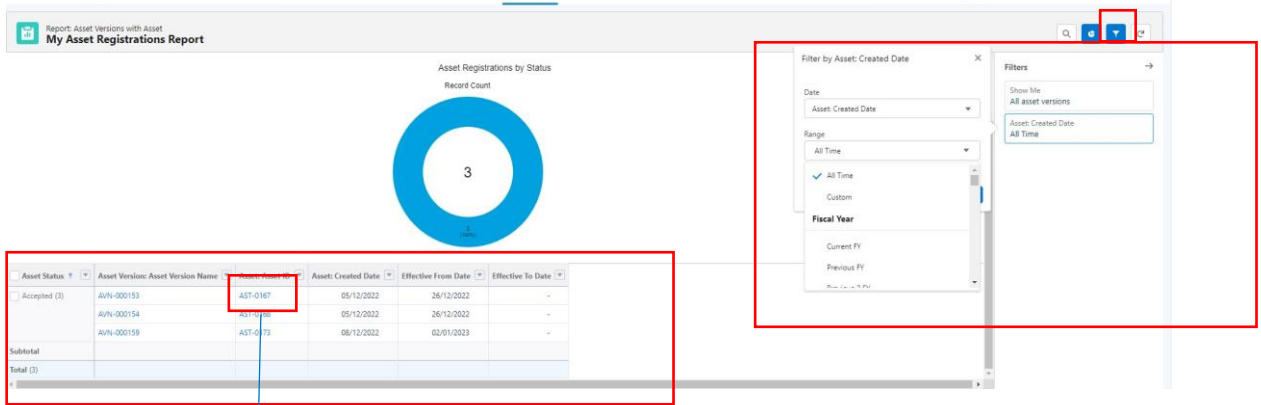


Figure 16.4: Individual Asset ID Record



Portal Users are able filter their Asset Data by selecting Assets created within a particular set of dates, a predefined set of filter criteria is available, so a search can take place to locate assets created in the last financial quarter or the last month as illustrated in Figure 16.2 overleaf.

12.3. My Unit Registrations Report

Figure 16.3: My Units Dashboard Metric

This metric is a graphic representational summary of the total number of units registered under your Account, further grouped by Unit Status, with a legend key available on the right hand corner of the screen as illustrated below.

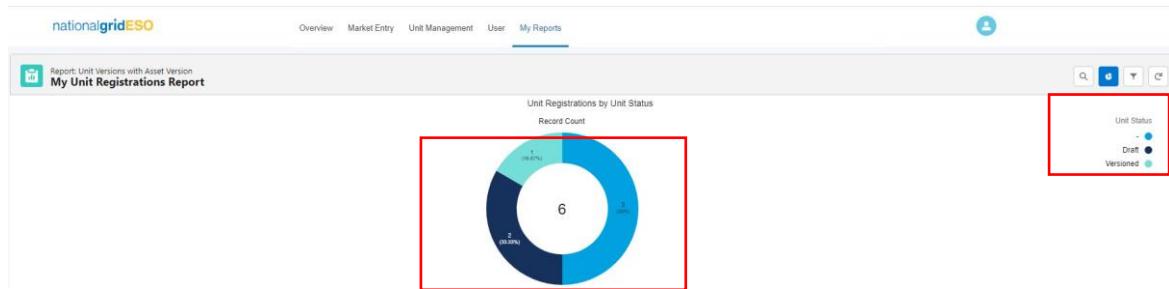


Figure 16.3.1: My Units Reporting Filters & Itemised Table

The reporting table provides an itemised breakdown of each of the Units registered with their respective BMU / Non BMU ID's, Unit Name and the Effective From & Effective to Dates displayed. The Units are grouped by Status category as illustrated below. The table can be condensed by switching the Details Row and Sub Totals Row from right to left as the table includes a larger number of records, it is easier to manage the list displayed.

Report: Unit Versions with Asset Version
My Unit Registrations Report

<input type="checkbox"/> Unit Status ↑	<input type="checkbox"/> BMU / Non BMU ID ↓	<input type="checkbox"/> Name ↓	<input type="checkbox"/> Effective From Date ↓	<input type="checkbox"/> Effective To Date ↓
<input type="checkbox"/> - (3)	-	Sunflower Fields	-	-
	-	Seaside View	-	-
	-	Seaside View	-	-
Subtotal				
<input type="checkbox"/> Draft (2)	-	Sunflower Fields	09/01/2023	-
	-	Seaside View	30/01/2024	-
Subtotal				
<input type="checkbox"/> Versioned (1)	-	Seaside View	26/12/2022	29/01/2024
Subtotal				
Total (6)				

Row Counts Detail Rows Subtotals Grand Total

12.4. My Alignments Report

This reporting table provides an itemised breakdown of each of the Assets registered and aligned to (or logically grouped) a particular Unit. The Unit is displayed in the first column with secondary columns displaying the Unit Record Ref, the corresponding Asset Record Ref, the Demand Capacity, Generation Capacity & Fuel type for each aligned asset. As with the Asset Registrations Report, the portal user is able to deep dive on an individual Unit or Asset Record by clicking on the reference itself highlighted in Figure 16.5 below. Moreover, portal users can also filter the report using date parameters as per the Asset Registrations Report.

Figure 16.5: My Alignments Itemised Table

Parent Application Unit Name	Unit Version Ref	Asset Version Name	Demand Capacity (MW)	Generation Capacity (MW)	Fuel Type
Sunflower Fields	0409	AVN-000153	60.00	60.00	Coal
Seaside View	0413	AVN-000154	50.00	50.00	Coal
Seaside View	0411	AVN-000154	50.00	50.00	Coal
Peacohaven	0433	AVN-000159	70.00	70.00	Batteries

The top screenshot shows the 'Edit Filter' dialog box with 'All unit versions' selected in the 'Show Me' dropdown. The 'Unit Version: Created Date' filter is set to 'All Time'. The bottom screenshot shows the 'Filter by Unit Version: Created Date' dialog box with the 'Range' dropdown set to 'All Time'.

12.5. My Pre-qualifications Report.

Figure 16.6: My Pre-qualifications Dashboard Metric

This metric is a graphic representational summary of the total number of prequalification applications submitted under your Account, further grouped by Application 'Status' and by Service, with a legend key available on the right-hand corner of the screen as illustrated below.

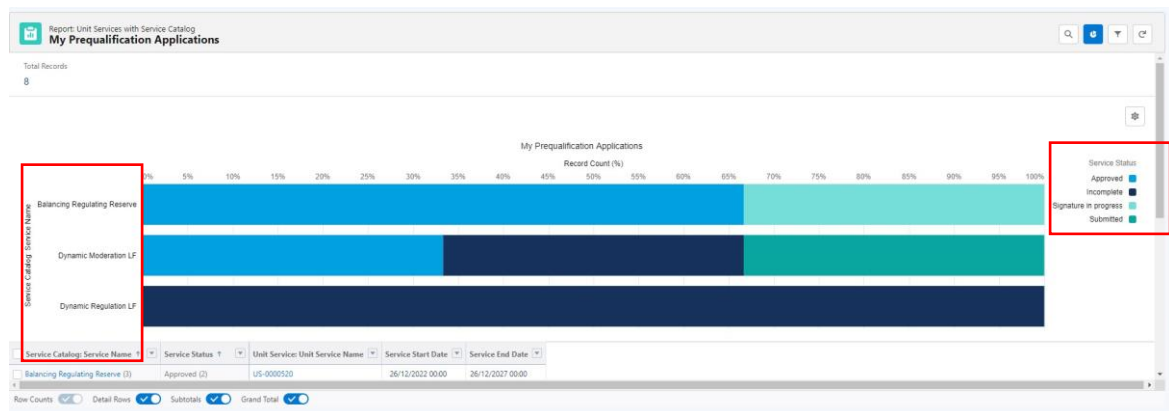


Figure 16.7: My Pre-qualifications - Itemised Table

The reporting table provides an itemised breakdown of each of the individual pre-qualification applications, grouped by Status and by the Service applied under. Each Row displays the corresponding Application Record (Unit Service: Unit Service Name) - The portal user is able to navigate directly to the individual Application Record if they want to view the granular level of detail or data.

Report: Unit Services with Service Catalog
My Prequalification Applications

Service Catalog: Service Name	Service Status	Unit Service: Unit Service Name	Service Start Date	Service End Date
Balancing Regulating Reserve (3)	Approved (2)	US-0000520	26/12/2022 00:00	26/12/2027 00:00
		US-0000522	26/12/2022 00:00	30/12/2024 00:00
	Subtotal			
	Signature in progress (1)	US-0000521	26/12/2022 00:00	30/12/2024 00:00
Subtotal				
Dynamic Moderation LF (3)	Approved (1)	US-0000523	19/12/2022 00:00	30/12/2025 00:00
	Subtotal			
	Incomplete (1)	US-0000529	-	-
	Subtotal			
Submitted (1)	US-0000536	26/12/2022 00:00	26/12/2025 00:00	
Subtotal				

Row Counts: Detail Rows: Subtotals: Grand Total:

13. Registering RDP MW Dispatch Assets

17.1. Create an Asset

To register a new asset, the first step is to click on the 'Create new asset' button where a user will be presented with the screen illustrated in Figure 'New Asset registration' where a unique asset name will be required. Please note that firstly an asset cannot be created without an asset name and secondly the **name must be unique in naming convention to the asset in question**. Once the asset name is provided, the user will be able to progress to the next step by clicking **create**.

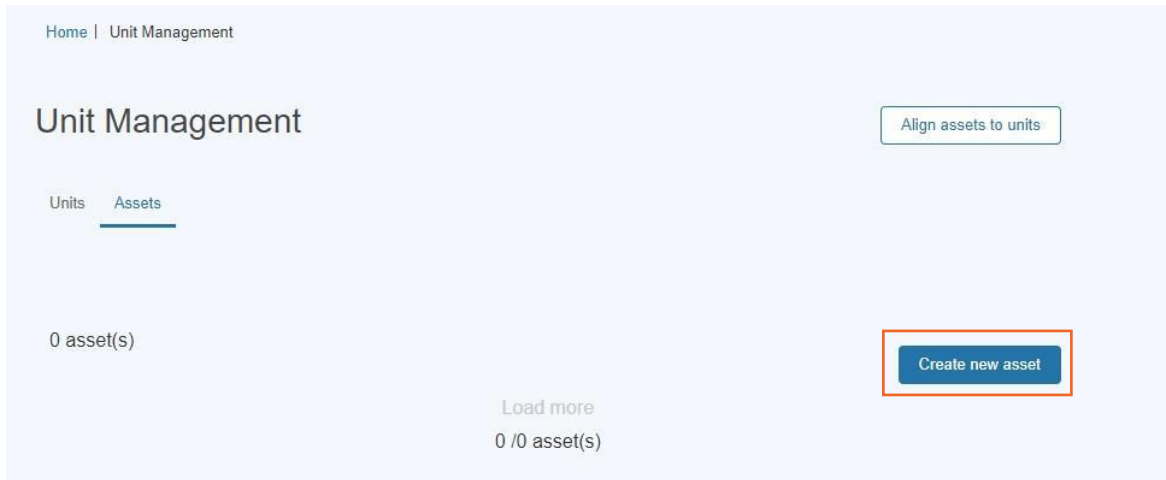
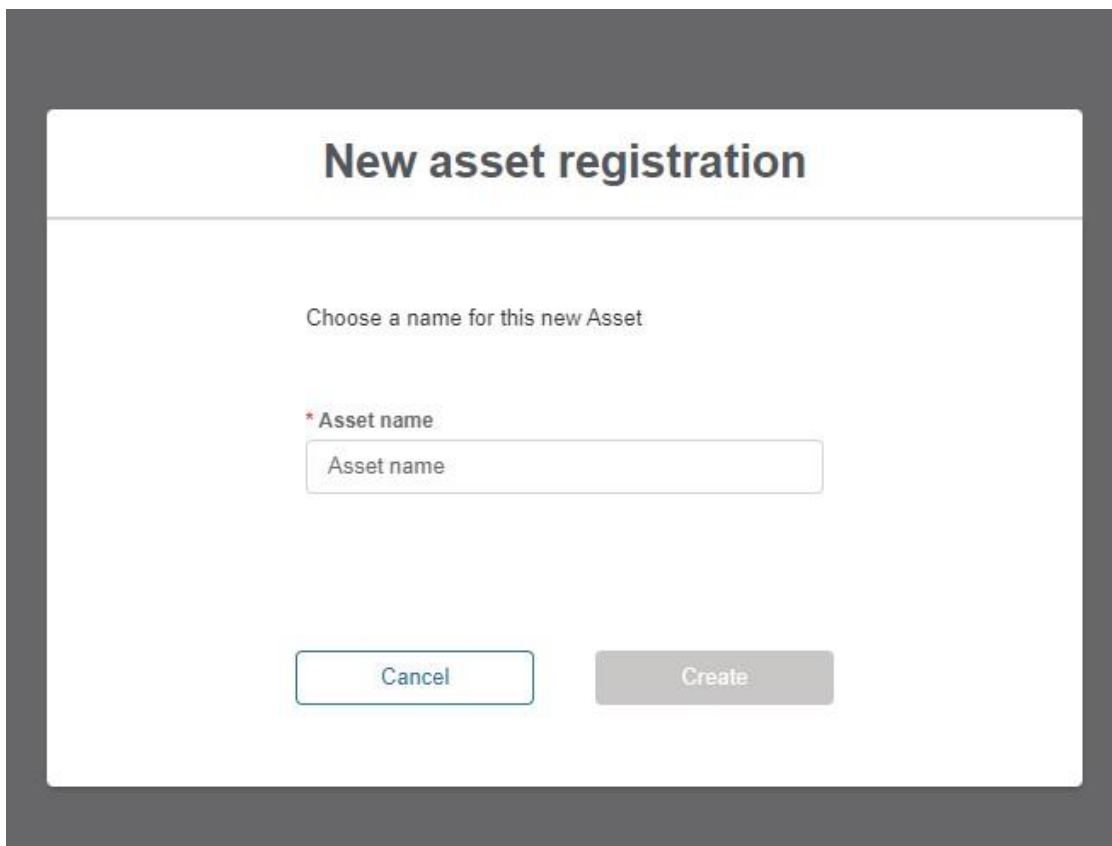


Figure 17.1: Creating Assets- Asset Registration



17.2. Asset Registration: Submitting Asset Information

The user is navigated to the Asset Registration Page as outlined in Figure 29.0, the format is similar to the Account Management Page structure with an accordion section on the left-hand side for direct navigation to a specific section or the user can select the sub section they wish to complete.

The figure illustrates the unique named asset for which the details are being registered; “*Roe dean Windfarm.*”

Please note that the user is not able to progress the registration process for a created asset without completing all the sections and corresponding fields.

Figure 17.2 Asset Registration Detail Page

New asset registration

Roedean Windfarm

Complete all the information below in order to complete the registration of a new asset

- 1 Asset Details
- 2 Connection Details
- 3 Site Location
- 4 MPAN

- > Asset Details
- > Connection Details
- > Site Location
- > MPAN

Save and create new one Save asset

17.3. Asset Registration: Asset Details Section

Figure 17.3 illustrates the Detail Section for the Asset.

Please note that as the *Applicable Market*, *Asset Ownership*, *Asset Type*, the *Effective from Date* and *Fuel Type* are all mandatory and therefore marked in a red Asterisk. It is essential that these fields have information submitted. The value selected in the Applicable Market field determines the behaviour of subsequent sections so please ensure RDP MW Dispatch is selected if applicable.

Please consult the Glossary Appendix for a translation of the Fields if the User is not clear about what is being requested.

Figure 17.3: Completing the ‘Asset Details’ Section

New asset registration

Roedean Windfarm

Complete all the information below in order to complete the registration of a new asset

1 Asset Details

2 Connection Details

3 Site Location

4 MPAN

Asset Details

* Asset Ownership

I am the asset owner

I am not the asset owner

Company Registration No. of Owner

* Asset Type

Generation Unit

Demand Unit

* Effective From Date

Effective From Date

* Fuel Type

Select Fuel Type

* Applicable Market

Balancing Services

RDP MW Dispatch

17.4. Asset Registration: Asset Connections Section

Figure illustrates the Asset Connection Details Section for the Asset.

If the user has selected *Generation Unit* as an *Asset Type* in the previous section, then *Generation Capacity* will appear here. If they have selected *Demand Unit* then *Demand Capacity* will appear. Please note that *Generation Capacity*, *Demand Capacity* (if visible) and *Connection Type* are all mandatory and therefore marked in a red Asterix. It is essential that these fields have information submitted. If RDP MW Dispatch has been selected as the Applicable Market in the previous section and Connected to DNO is ticked, the DNO Type options will be 'National Grid Electricity Distribution' and 'UK Power Networks'.

Figure 17.4: Completing the 'Asset Connection Details' Section

The screenshot shows a web form titled "Connection Details" with a dropdown arrow. The form contains several fields and options:

- * Generation Capacity** (mandatory): A text input field with an information icon.
- * Connection Type** (mandatory): Radio buttons for "Firm" and "Flexible". "Flexible" is selected.
- Connection Method**: Three checkboxes for "Distribution", "Private Lines", and "Transmission", all of which are unchecked.
- Connected to DNO**: A checked checkbox with an information icon.
- * DNO Type** (mandatory): A dropdown menu showing "National Grid Electricity Distr..." with a downward arrow.
- * DNO Unique Reference Number** (mandatory): A text input field with an information icon.
- Connection point voltage**: A dropdown menu showing "Select CP Voltage" with a downward arrow.

17.5. Asset Registration: Asset Site Location

Figure 17.5 illustrates the Site Location Section for the Asset.

Please note that the Post Code and Grid Supply Point (GSP) are both mandatory and therefore marked in a red Asterix. It is essential that these fields have information submitted. Post Codes must be submitted in a UK format.

For RDP MW Dispatch Assets, a maximum of one value can be selected in the Grid Supply Point (GSP) field. The GSP Group Id field is locked to Southwestern England if National Grid Electricity Distribution is selected as the DNO Type or Southeastern England if UK Power Networks is selected as the DNO Type

Figure 17.5: Completing the 'Asset Site Location Details' Section

The screenshot shows a web form titled "Site Location" with a dropdown arrow. The form contains the following fields and sections:

- Street** and **City**: Two text input fields.
- State/Country** and **Country**: Two text input fields.
- *Post Code**: A text input field with a red asterisk and a help icon.
- Asset Latitude** and **Asset Longitude**: Two text input fields with help icons.
- Nearest node**: A text input field with a help icon.
- GSP Group Id**: A dropdown menu currently showing "South Western England".
- *Grid Supply Point (GSP)**: A section with a red asterisk and help icon. It features a list of GSP codes (ABHA_1, ALVE_1, AXMI_1, BRWA_1, EXET_1, INDQ_1, LAND_1) on the left, a large empty box in the center, and arrow buttons for selection.
- Primary despatch phone number**: A dropdown for "Select country code" followed by a text input field.
- Secondary despatch phone number**: A dropdown for "Select country code" followed by a text input field.
- Despatch fax number**: A dropdown for "Select country code" followed by a text input field.
- Site Contact Name** and **Site Contact Number**: Two text input fields.
- Agent/Applicant Operational Email** and **Agent/Applicant Operational Phone**: Two text input fields.

17.6. Asset Registration: Asset MPAN Details

Figure 17.6 illustrates the MPAN Details Section for the Asset.

Please note that as the Operational Metering Availability & MPAN Export Fields are all mandatory and therefore marked in a red Asterix. It is essential that these fields have information submitted.

For RDP MW Dispatch Assets, the user is unable to submit values for Additional MPAN Import and Additional MPAN Export and so these fields are uneditable.

For additional clarification, the user can hover over the 'i' icon for 'Help Text' as illustrated in the figure below.

Figure 17.6: Completing the 'Asset MPAN Details' Section

MPAN

* Operational Metering Availability

Yes

No

MPAN Import ⓘ

*MPAN Export ⓘ

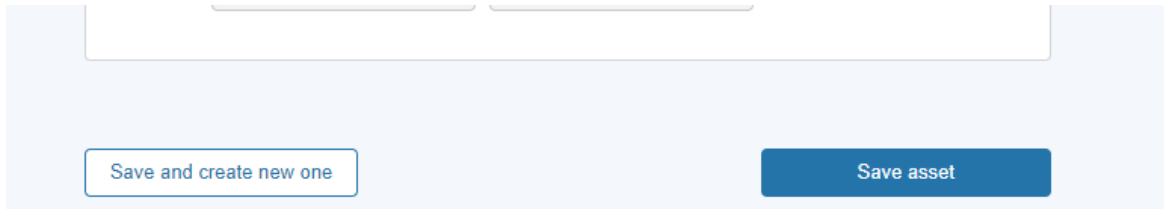
Additional MPAN Import ⓘ Additional MPAN Export ⓘ

17.7. Asset Registration: Save Asset Detail Submission.

Once all the sections are completed correctly, then the 'Save Asset' button will appear in a blue background, enabling the user to complete the registration process for creating the asset.

If the User wishes to repeat the exercise and create subsequent assets, they can select the 'save and create new one' button instead.

Figure 17.7: Save Asset options.

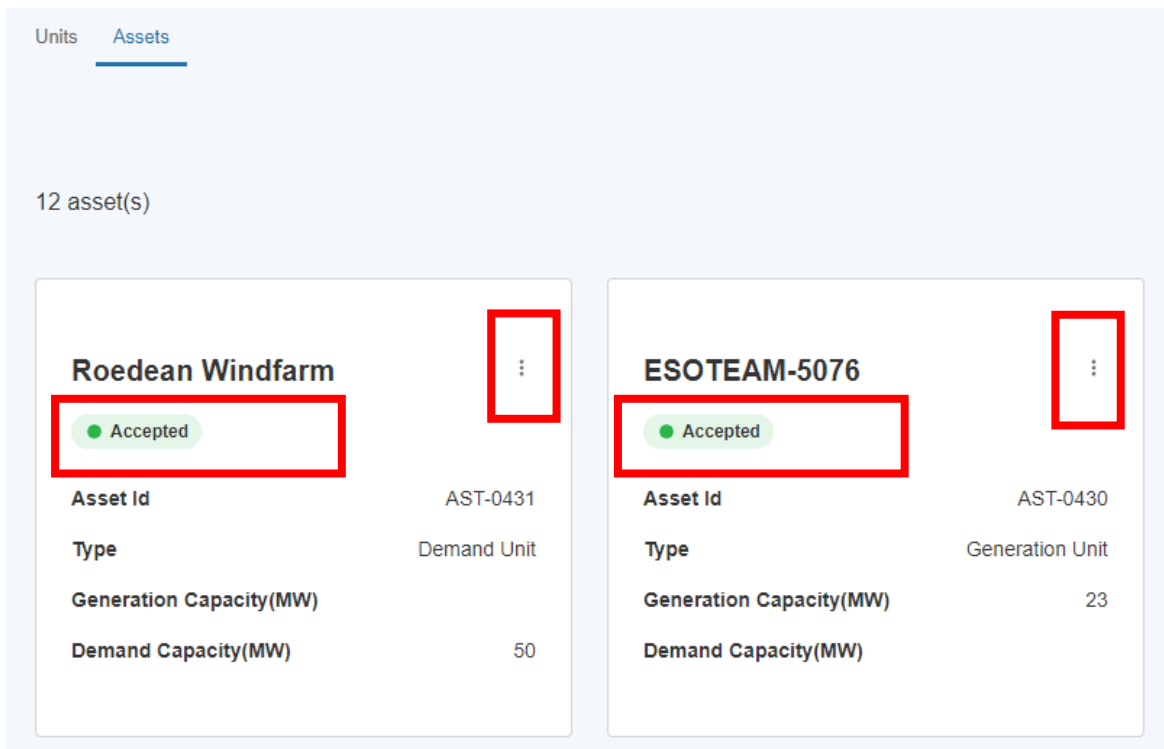


17.8. Asset Registered: Asset Tile & Updating the Asset

Following on from the Asset Registration, the asset tile will appear on the Unit Management Home Page under the 'Asset' tab. Each asset will have a corresponding tile. The tile displays the 'key or summary information'. To view the full registration details, click on the three dots on the right-hand corner of the tile. The user then selects the 'View Details' link to be re-directed to the Asset Detail page expanded version.

Please note that for Release 1.0, Users will be expected to submit all asset information at once. Upon 'saving the asset' registration details, the Asset Status will appear as 'Accepted' automatically as illustrated in Figure.

Figure 17.8: Asset Tiles



Prior to the Unit being Accepted and the Unit Service Pre-Qualification being Approved, the user is able to edit details of the Asset. Click on the 'View Details' link from the Asset title, then 'Edit asset information' on the Asset Details page.

Figure 17.8.2: Edit asset information link.

12 asset(s)

ESOTEAM-5736 RDP

Accepted

Asset Id: AST-0479
Type: Generation Unit
Generation Capacity(MW): 23
Demand Capacity(MW):

Test 1110

Accepted

[View Details](#)

Asset Id: AST-0478
Type: Generation Unit
Generation Capacity(MW): 55
Demand Capacity(MW):

Status: Accepted
Asset Name: Test 1110

Actions

- + Create new asset version
- [Edit asset information](#)

Press Update on the Update asset Information pop-up, then make changes as necessary. When finished, press the 'Update asset' button to update the Asset and corresponding Unit, or 'Update and create new one' to start creating another Asset.

Figure 17.8.3: Update Asset options.

The screenshot shows a web form for unit creation. It contains the following fields and buttons:

- MPAN Import** (with an information icon): An empty text input field.
- *MPAN Export** (with an information icon): A text input field containing the value "11111111111112".
- Additional MPAN Import** (with an information icon): An empty text input field.
- Additional MPAN Export** (with an information icon): An empty text input field.
- Update and create new one**: A light blue button with a dark blue border.
- Update asset**: A solid dark blue button.

17.9. Unit Creation

When an Asset is created with RDP MW Dispatch selected as the value in the Applicable Market field a Unit is automatically created with the same name as the Asset. This Unit will have a status of 'Draft' prior to its approval by the NGESO Registration Team. The NGESO Registration Team will a) assign the Unit a Unit ID (which will auto populate on the Unit Id field) b) set the Unit Status field from 'Draft' to 'Accepted' or 'Rejected'.

Figure 17.9: Unit Tiles

Units Assets

12 unit(s)

Roedean Windfarm ⋮

● Draft

Unit Id	
Type	Demand Unit
Generation Capacity(MW)	0
Demand Capacity(MW)	50
Assets	1

ESOTEAM-5076 ⋮

● Draft

Unit Id	BMU-5076
Type	Generation Unit
Generation Capacity(MW)	23
Demand Capacity(MW)	0
Assets	1

17.10. Identifying Units for RDP Unit Pricing

Once the Unit has been created the user can record the RDP unit price.

To do this, the user must navigate to the selected unit on the Unit Management home page and hover over the right hand three corner and click on the three dots on the Unit tile as highlighted in the Figure below. Then they must select 'View Details'.

Figure 17.10 View Details on Unit link

Units Assets

12 unit(s)

Roedean Windfarm ⋮

● Draft

[Pre-qualify for Services](#)

[View Details](#)

Unit Id	
Type	Demand Unit
Generation Capacity(MW)	0
Demand Capacity(MW)	50
Assets	1

ESOTEAM-5076 ⋮

● Draft

Unit Id	BMU-5076
Type	Generation Unit
Generation Capacity(MW)	23
Demand Capacity(MW)	0
Assets	1

17.11. Recording RDP Unit Pricing

The user will then be presented with the Unit Details page, which features a section in which to enter the price of the RDP Unit in £/MWh. Please note that entering non-numeric characters into this section and pressing 'Confirm pricing' will cause the screen to become frozen so the user should enter numeric characters only. If the price is entered on or before 4pm on a given day, the price will be valid from 5am the next day. If the price is entered after 4pm on a given day, the price will be valid from 5am the day after the next day.

The user enters the price in the field in the left-hand side (this must be a numeric value with up to 2 decimal places i.e. pounds and pence), then presses Confirm pricing to record it. The details of the latest price will then be visible to the user in the row underneath.

Figure 17.11: RDP Unit Pricing section

> Roedean Windfarm

RDP Unit Pricing

You can record your RDP unit price here.
 Note: prices updated after 4pm wont be considered for the following day, and will be pushed to the day after that.

£/MWh

Latest Price	Updated Date	Updated Time	Valid From
£35/MWh	2 December 2022	09:12	5:00 AM 03 December 2022

[View pricing history ->](#)

17.12. Unit Pricing History

To view the Pricing History of the Unit, the user can click the View Pricing history link of the RDP Unit Pricing section.

> Roedean Windfarm

RDP Unit Pricing

You can record your RDP unit price here.
 Note: prices updated after 4pm wont be considered for the following day, and will be pushed to the day after that.

£/MWh

Latest Price	Updated Date	Updated Time	Valid From
£35/MWh	2 December 2022	09:12	5:00 AM 03 December 2022

[View pricing history ->](#)

Here they are presented with the prices entered for the unit, the date and time it was entered and the date and time it was valid from.

Figure 17.11.2: RDP Unit Pricing History

Pricing History

Roedean Windfarm

Latest Price

Latest Price	Updated Date	Updated Time	Valid From
£87/MWh	2 December 2022	09:15	5:00 AM 03 December 2022

Past Prices

Past Price	Updated Date	Updated Time	Valid From
£50/MWh	2 December 2022	09:15	5:00 AM 03 December 2022
£35/MWh	2 December 2022	09:12	5:00 AM 03 December 2022

[Load more](#)

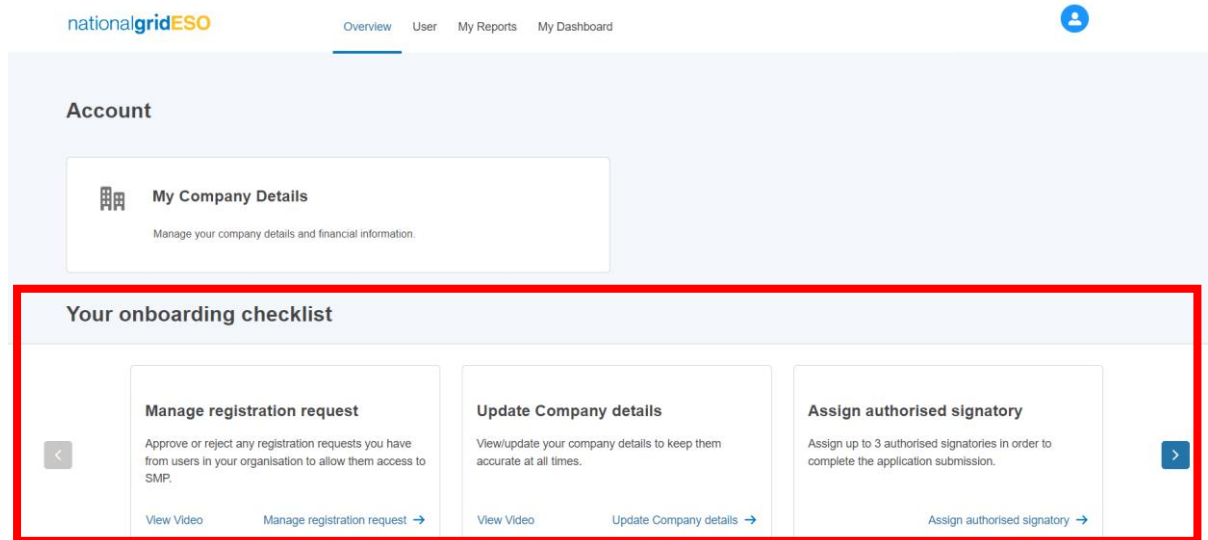
3 / 3 unit price(s)

14. Onboarding Checklist

As of Release 2.13, users will be presented with a carousel displaying Onboarding Checklist cards when they log into SMP. This will appear on the Overview page, underneath the Account section.

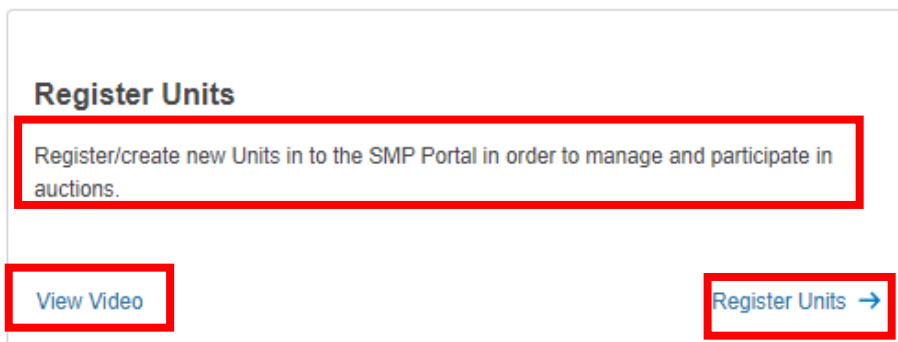
Pressing the Arrow button on the left and right will move the carousel to reveal additional tasks.

Figure 15.1: Onboarding Checklist Location



The cards will contain text detail on the task, a link to video guidance where applicable and a link to the page on SMP where the user can undertake the task.

Figure 15.2: Onboarding Checklist Task



Users with different roles will see different items relevant to them. For instance, a user with the Super User role will see tasks such as Manage Registration Requests and Assign Authorised Signatories

Figure 15.3: Super User Onboarding Checklist

Your onboarding checklist



Manage registration request

Approve or reject any registration requests you have from users in your organisation to allow them access to SMP.

[View Video](#)

[Manage registration request →](#)

Update Company details

View/update your company details to keep them accurate at all times.

[View Video](#)

[Update Company details →](#)

Assign authorised signatory

Assign up to 3 authorised signatories in order to complete the application submission.

[Assign authorised signatory →](#)



Not finding what you need? You can download our [User Guide](#).

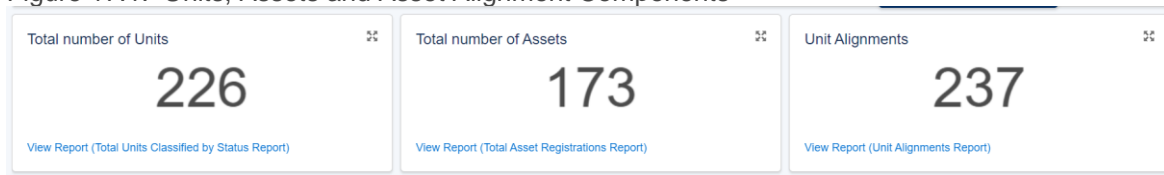
15. SMP Overview Dashboard

A dashboard has been created consisting of multiple reports to display data from the user's SMP account's portfolio. This is accessible on the Overview page to users with Unit Manager permissions. As of Release 2.13 the following components are displayed.

15.1. Total Numbers of Units, Assets and Alignments

These display the total number of Units and Assets (including versioned records) accessible to your account. The number of alignments between the two is displayed on the right hand component – this can be higher than the number of Units or Assets if a single Asset has been aligned to multiple Units.

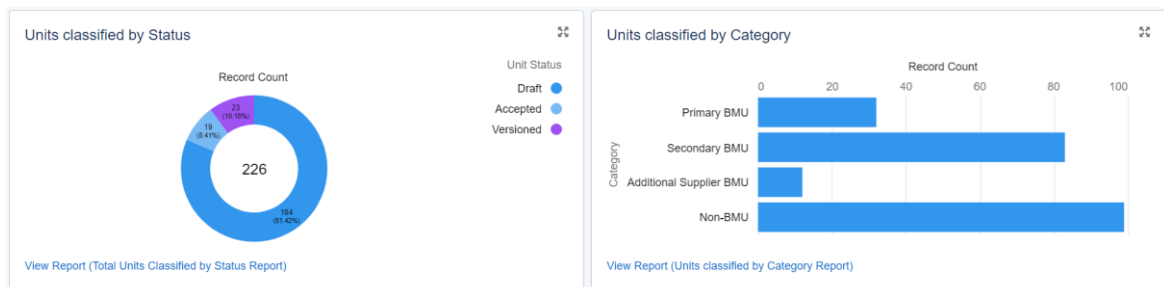
Figure 17.1: Units, Assets and Asset Alignment Components



15.2. Units classified by Status and Category

The left hand component shows a doughnut chart with units grouped together by status, including a percentage of the total number of units for that status. On the right the user can see the same Units classified by the Category in relation to the BM.

Figure 17.2: Units classified by Status and Category Components

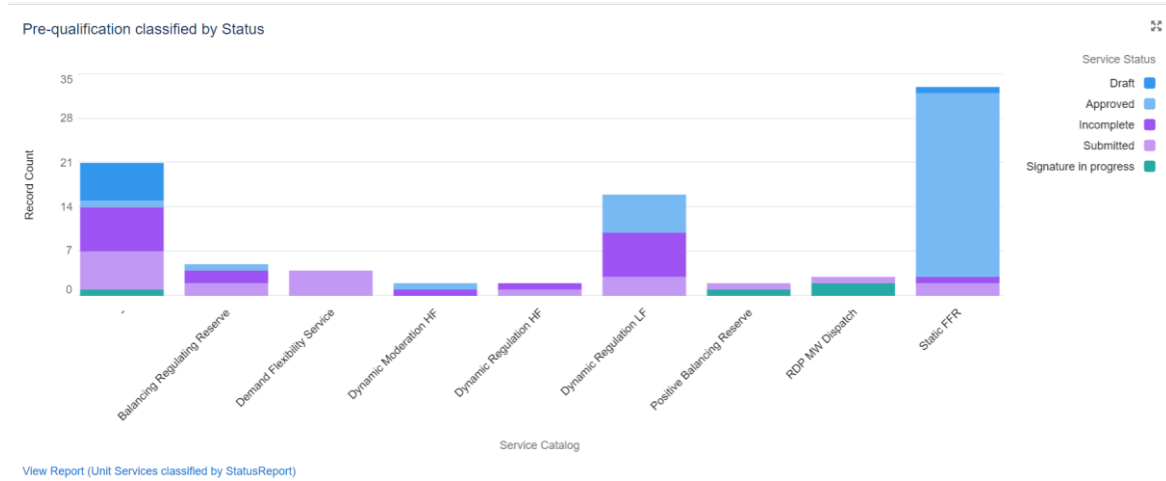


15.3. Prequalification requests by Status and Service

This will display the services that units accessible to this account have applied for, including the number of applications for each service. The status of these applications is grouped in each

column and colour coded with a key for this on the right hand side of the component under Service Status.

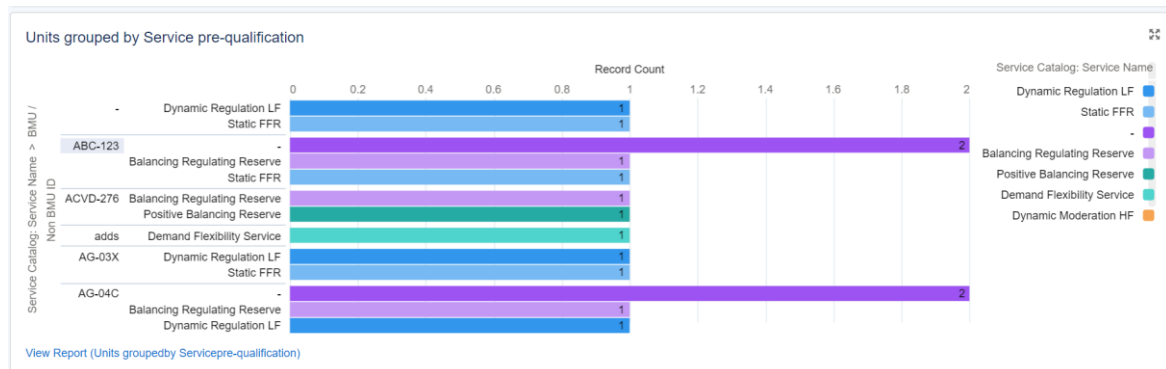
Figure 17.3: Prequalification requests grouped by Service on the x-axis and Status on the y-axis



15.4. Units grouped by Service pre-qualification

Displayed here are Units grouped by their BMU/Non-BMU ID on the left then are grouped by services they have applied for. The services are colour coded, with the key for this again on the right hand side of the component, under Service Catalog:Service Name.

Figure 17.4: Units grouped by the service they are pre-qualifying for



15.5. Units grouped by Assets and Assets grouped by Service

The component on the left can be used to determine which Assets are aligned to Units. This includes the Unit Name, Asset Name and BMU/Non-BMU ID of the Unit. The component on the right shows the relationship between Assets and Services that have been applied for via the Units those Assets are aligned now. The fields shown are the Asset Name, Service Name, Unit of Measurement (from the Service) and Generation and Demand Capacity (from the Asset).

Figure 17.5: Units by Assets and Assets by Service

Units grouped by Assets				Asset grouped by Service				
Unit Version Ref..	Name	Asset Version: SMP_Asset_Na...	BMU / Non BMU...	Asset Name ↑	Service Name	Unit of Measurement	Generation Capacity	Demand Capacity
10340	UNIT 101	ASSET 101	AG-03X	afqwf	Static FFR	MW	12.000	0.000
10340	UNIT 101	ASSET 102	AG-03X	afqwf	Static FFR	MW	12.000	0.000
10345	UNIT 102	ASSET 102	AG-04C	afqwf	Static FFR	MW	12.000	0.000
10374	Asset RDP 103	Asset RDP 103	-	afqwf	Static FFR	MW	12.000	0.000
10378	UNIT 101	ASSET 101	AG-03X	afqwf	Static FFR	MW	12.000	0.000
10380	UNIT 102	ASSET 101	AG-04C	API_BalAsset00238	Static FFR	MW	50.000	60.000
10380	UNIT 102	ASSET 102	AG-04C	API_BalAsset00238	Static FFR	MW	50.000	60.000

View Report (Units grouped by Assets Report) View Report (Asset grouped by Service Report)

16. Glossary of Terms

Term	Description
Account	A Salesforce account.
Alignment of Assets	Assign one or more assets to a unit.
Asset	One Plant and Apparatus located at the same Grid Supply Point that has a single physical connection.
Asset Testing	The Asset test records, MW, Date of testing by an Independent Technical Engineer (ITE), which will be aligned against a service.
Balancing Service Provider	A market participant as defined by the Electricity Balancing Guidelines who is NGENSO's counterparty to a Balancing Services Contract.
Connection Type	This can be Firm or Flexible.
DNO Type	Distribution Network Operator.
Effective from Date	The date that an asset is live and connected to the Grid.
Grid Supply Point	The points where power is delivered from the transmission system to either a distribution network or a customer directly connected to the transmission system.
Pre-qualification for Services	Process of submitting data and evidence for a unit requesting approval for participation for a particular service.
Unit	A logical grouping of a single or multiple group of assets.
Unit Calibration	Process of assigning a unit across multiple services.
User	Registered user of SMP.

19. Updates - Release 2.13

As of release 2.10 users will be able to pre-qualify for 2 new services – Positive Balancing Reserve and Negative Balancing Reserve. These include 3 new parameters on the application screen:

- Telephony Available to
- Telephony Available from
- Time to Full Delivery (in mins)

Accounts that already submitted a pre-qualification for Balancing Regulating Reserve should find that they are able to use the same units to qualify for these new services, and that the values they inputted for their prior application should copy across to their new application for Positive Balancing Reserve.

Figure 19.1: Telephony Available from/to & Time to Full Delivery fields

Positive Balancing Reserve

Unit Calibration Section

Complete the information to calibrate your unit.

* Allocated Volume 12	Unit of Measurement MW	* Max Utilisation Period 1	* Minimum Non Zero Time 1
* Response Time 1	* Cease Time 12	* Time to Full Delivery (in mins) 2	
* Telephony Available from 01:00	* Telephony Available to 05:00		

As of Release 2.13, there is a new field available when pre-qualifying for Positive and Negative Balancing Reserve titled 'Service Provision'. This is a mandatory picklist field with options for Generator, Supplier and Through Zero.

Figure 19.2: Service Provision Field

Negative Balancing Reserve

Unit Calibration Section

Complete the information to calibrate yc

* Allocated Volume 12
* Response Time 1
* Telephony Available from 01:00
* Service Provision Generator

17. FAQs

Topic	Question	Answer
SSO (User & Company Registration)	I've changed my mobile phone – do I have to do anything regarding my SSO Credentials	Your will need to approach your Contract Manager to raise a support desk ticket to update your mobile phone number. .
SSO (User & Company Registration)	I'm experiencing problems with my password	Please approach your Contract's Manager who will raise an IT helpdesk ticket on your behalf
SSO (User & Company Registration)	I'd like to access more than one Account for SMP; however I have the same email address – how do I got about this	Please approach your Contract's Manager who will raise an IT helpdesk ticket on your behalf to set up your credentials and access for a 'Secondary Account'

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