

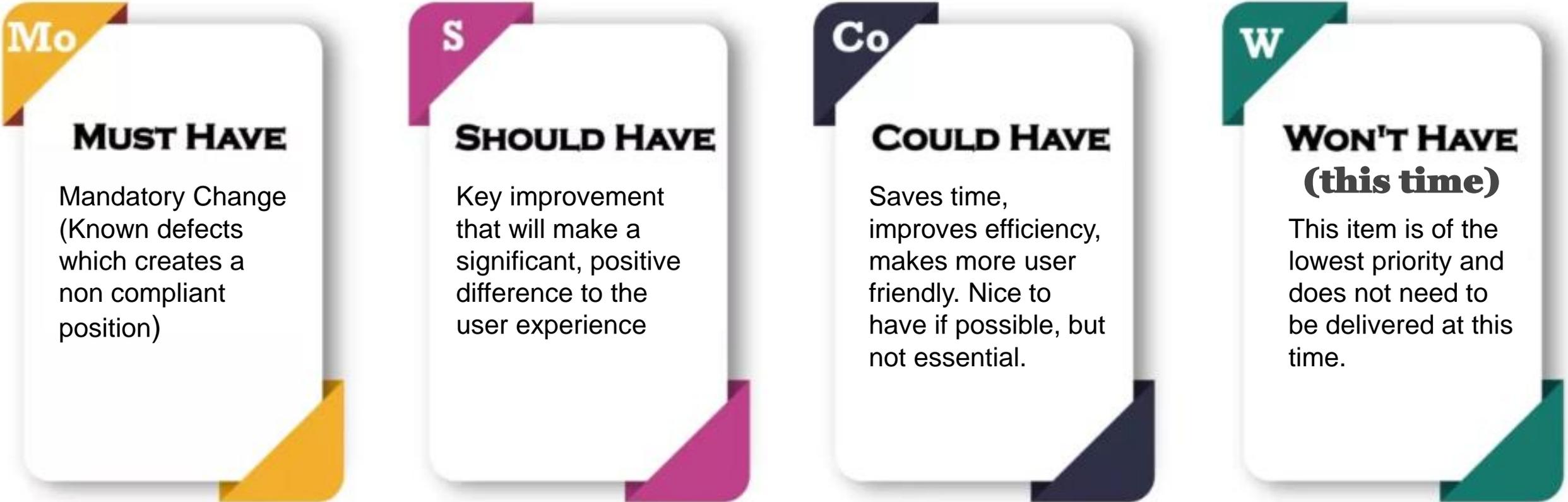
EMR Delivery Body (DB) New Portal User Group

Enhancements

04 July 2024

Enhancement Prioritisation

A prioritisation technique to reach a common understanding on the importance of delivery for each enhancement.



Arrange Items On My EMR / Management Activities In Alphabetical Order

EMR DB View:

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Must Have
Should Have
Could Have
Won't Have

Category – Agreement Management

Enhancement Description

As a Capacity Provider user

I want to see the items on the My EMR / Management Activities screen arranged in alphabetical order.

Benefit

So that it makes it easier to find an item and the organisation of screens is consistent.

As-Is: Currently not in alphabetical order.

Considerations

Frequency Of Use

Medium – for the completion of management activities

Impacted CMU Type(s)

All

First Operational Use

Immediate Use

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Arrange Filter Drop-Down Lists Alphabetically In Outstanding Activities

EMR DB View:

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Must Have
Should Have
Could Have
Won't Have

Category – PQ/AM – Outstanding Activities

Enhancement Description

As a Capacity Provider user

I **want** to have the drop-down lists on the Outstanding Activities screen arranged in alphabetical order. [For filter company, filter submission status & filter requirement]

Benefit

So that it is easier to find an item and the organisation of screens consistent.

As-Is: Currently not in alphabetical order.

Considerations

Frequency Of Use

Medium – for the completion of outstanding activities

Impacted CMU Type(s)

All

First Operational Use

Immediate Use

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Keep User On Filtered Page When Completing “Submit For Review”

EMR DB View:

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Must Have
Should Have
Could Have
Won't Have

Category - PQ/AM – Outstanding Activities

Enhancement Description

As a Capacity Provider user

I want to remain on the filtered screen when I “Submit For Review”.

Benefit

So that I avoid losing the filtered information I was working on and have to repeat the process of applying the same filters to get back to the same filtered information.

As-Is: Currently, the system takes the user back to all Outstanding Activities rather than back to the filtered selection the user was working on

Considerations

Frequency Of Use

Medium – for the completion of outstanding activities

Impacted CMU Type(s)

All

First Operational Use

Immediate Use

Accompanying (As-Is) Screen Shots

N/A

Duplicate CMU ID Error Message

Category - PQ - CMU

EMR DB View:	User Group Position:
Must Have	Must Have
Should Have	Should Have
Could Have	Could Have
Won't Have	Won't Have

Enhancement Description

As a Capacity Provider user

I want that when I enter a CMU ID for a new CMU which is already taken, an error message should appear immediately to inform them that it is a duplicate.

Benefit

So that I can select a different CMU ID immediately instead of filling all CMU information all over again. It would save me time and make the process less prone to human error.

As-Is: Currently the error message only appears when the user clicks “Next” to move onto the next page.

Considerations

Frequency Of Use

Medium – when registering new CMUs

Impacted CMU Type(s)

All

First Operational Use

Immediate Use

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Reorder filter boxes on CMU and Components

EMR DB View:

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Must Have
Should Have
Could Have
Won't Have

Category - PQ - CMU

Enhancement Description

As a Capacity Provider user

I want to see reordered filter boxes on the CMU & Components screen that reflect the order of the columns on the page.

Benefit

So that it makes the screen more user friendly.

As-Is: Filter Boxes on CMU and components are not in correct order of the columns.

Considerations

Frequency Of Use

High – when filtering on any screens

Impacted CMU Type(s)

All

First Operational Use

Immediate Use

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Connection Capacity Calculation Method Visibility

EMR DB View:

User Group Position:

Category - PQ Component

Must Have
Should Have
Could Have
Won't Have

Must Have
Should Have
Could Have
Won't Have

Enhancement Description

As a Capacity Provider User,

I want the option “Historic/Average Output” for the method to calculate connection capacity should only be visible to specific CMU types and should be removed for all irrelevant CMU types.

It should only be visible to Existing Generating and Pre-Refurb Generating components

Benefit

So that this would avoid users selecting a capacity calculation method which is not applicable to the CMU type they are completing the application for

As-Is: currently visible for all* CMU types

*Method used to calculate the Connection Capacity is not applicable for Unproven and Proven DSR CMUs

Considerations

Frequency Of Use

High – during PQ application submission window

Impacted CMU Type(s)

New Build / Refurbishing Generating / Interconnector

First Operational Use

Immediate Use

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Include Application / Dispute ID On Disputes Letter File Name

EMR DB View:

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Must Have
Should Have
Could Have
Won't Have

Category - PQ - Disputes

Enhancement Description

As a Capacity Provider user

I want to include the application / dispute ID in the file name of the Disputes letter

Benefit

So that this would specify the application the disputes letter belongs to in the file name, to avoid confusion.

Eg

As-Is: Currently, the file name only states the CMU type, e.g 'Unproven DSR'. Unlike the Prequalification Results Letter, e.g 'A-T-4-2027-TEST001-00001'

Considerations

Frequency Of Use

Medium – during Disputes Window

Impacted CMU Type(s)

All

First Operational Use

Immediate Use

Accompanying (As-Is) Screen Shots

N/A

Provide Text Box For Each Rejection Reason

EMR DB View:

User Group Position:

Category - PQ - Disputes

Must Have
Should Have
Could Have
Won't Have

Must Have
Should Have
Could Have
Won't Have

Enhancement Description

As a Capacity Provider user

I want to include a text box to address each rejection reason received individually

Benefit

So that it allows me to add comments against each individual rejection reason, making it simpler and easier to understand

As-Is: Currently, there is only one text box of each type to address all rejection reasons at Disputes.

Considerations

Frequency Of Use

High – during Disputes Window

Impacted CMU Type(s)

All

First Operational Use

Disputes Submission Window

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Automatically Show All Records On Application Results Page

EMR DB View:

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Must Have
Should Have
Could Have
Won't Have

Category - PQ – Results

Enhancement Description

As a Capacity Provider user

I want to see all records for all auctions when I open the PQ Application Results page.

Benefit

So that I avoid being taken away from the screen I am working on.

As-Is: Currently, the user has to filter first to see results.

Considerations

Frequency Of Use

Medium – to view results after PQ/Disputes

Impacted CMU Type(s)

All

First Operational Use

Immediate Use (for those with Application Results)

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Provide List Of Agreements To Select From For Security Interests

EMR DB View:

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Must Have
Should Have
Could Have
Won't Have

Category - PQ – Security Interest

Enhancement Description

As a Capacity Provider user

I want to see a list of eligible agreements to select from to apply security interests.

Benefit

So that I can upload security interests for applications in one transaction.

As-Is: Currently, the user has to upload the security interest individually for each agreement.

Considerations

Frequency Of Use

Low – minimum use of Security Interests

Impacted CMU Type(s)

All

First Operational Use

Immediate Use

Accompanying (As-Is) Screen Shots

N/A

Remove “Upload Document” Button Until Document Category Is Selected

EMR DB View:

Must Have
Should Have
Could Have
Won't Have

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Category – Uploading Documents

Enhancement Description

As a Capacity Provider user

I want the “Upload Document” button to be visible **after** the document category is selected.

Benefit

So that I do not cause an error by clicking on ‘Upload Document’ before I have selected a category

As-Is: Currently, the “Upload Document” button to be visible **before** the document category is selected.

Considerations

Frequency Of Use

Medium – functionality often used

Impacted CMU Type(s)

All

First Operational Use

Immediate Use

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Separate “Save And Quit” Button In Application

Category - PQ Application

EMR DB View:

Must Have
Should Have
Could Have
Won't Have

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Enhancement Description

As a Capacity Provider User,

I **want** the option to save and return to the current application I was working on if I have had to navigate away to the Company Screen to make changes.

Benefit

So that this would give a user the option to save separately rather than quitting, which will allow a user to Save then use the “Return To Application” button instead of having to go to the main screens.

As-Is: When you make an application, you have the option to go to the Company screen, to review your information there. If you make any changes, you must save them by using the Save and Close button, which returns you to the Main Company selection screen, not the Application screen. If you make changes and use the 'Return to application button', you are returned to the Application without saving any changes.

Considerations

Frequency Of Use

High – during PQ application submission window

Impacted CMU Type(s)

All

First Operational Use

Prequalification Application Submission Window

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Auto-Calculate Capacity On Application

Category - PQ Application

EMR DB View:
Must Have
Should Have
Could Have
Won't Have

User Group Position:
Must Have
Should Have
Could Have
Won't Have

Enhancement Description

As a Capacity Provider User,

I **want** the system to calculate capacity automatically for CMU application when user clicks on “Create Application”, rather than the user having to click “Calculate”.

Benefit

So that this would allow capacity to be automatically calculated when creating an application for a CMU, rather than the user having to click “Calculate” to view the figures

As-Is: Currently user has to click "Calculate" to view the Capacity figures.

Considerations

Frequency Of Use

High – during PQ application submission window

Impacted CMU Type(s)

All

First Operational Use

Prequalification Application Submission Window

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Reword LCE Declaration

Category - PQ Application

EMR DB View:

Must Have
Should Have
Could Have
Won't Have

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Enhancement Description

As a Capacity Provider User,

I want to reword "LCE Application Made But Not Determined" declaration.

Benefit

So that This would make the declaration clearer and less confusing for users completing an application

As-Is: - please see appendix

Considerations

Frequency Of Use

High – during PQ application submission window

Impacted CMU Type(s)

All

First Operational Use

Prequalification Application Submission Window

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Allow Downloading Of Applications

Category - PQ Application

Did not cover in User Group session held 4 July 2024.

EMR DB View:
Must Have
Should Have
Could Have
Won't Have

User Group Position:
Must Have
Should Have
Could Have
Won't Have

Enhancement Description

As a Capacity Provider User,

I want to have the function to download applications.

Benefit

So that this would allow the user to view all the questions and answers submitted in the application via a downloaded copy and viewed offline.

As-Is: There is no functionality to download applications

Considerations

Frequency Of Use
Medium – during PQ application submission window

Impacted CMU Type(s)
All

First Operational Use
Prequalification Application Submission Window

Accompanying (As-Is) Screen Shots
N/A

Application Declarations Validation

Category - PQ Application

Did not cover in User Group session held 4 July 2024.

EMR DB View:

Must Have
Should Have
Could Have
Won't Have

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Enhancement Description

As a Capacity Provider User,

I want to be not allowed to submit applications if I have not ticked: Declaration that application is correct; Declaration of solvency; & one of the Low Carbon statuses.

Benefit

So that this would avoid users submitting applications which are incomplete, where the above declarations have been missed

As-Is: Currently the system allows users to submit applications when they have not completed these fields

Considerations

Frequency Of Use

High – during PQ application submission window

Impacted CMU Type(s)

All

First Operational Use

Prequalification Application Submission Window

Accompanying (As-Is) Screen Shots

[Link Here to Appendix](#)

Allow Save And Continue With Applications

Category - PQ Application

Did not cover in User Group session held 4 July 2024.

EMR DB View:

Must Have
Should Have
Could Have
Won't Have

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Enhancement Description

As a Capacity Provider User,

I want stay on the same page when I click "Save" and then to continue with the application.

Benefit

So that this would give a user the option to save and continue with the application they are completing, rather than automatically being taken back to the main page

As-Is: User is redirected back to the Applications grid page (which is the previous screen).

Considerations

Frequency Of Use

High – during PQ application submission window

Impacted CMU Type(s)

All

First Operational Use

Prequalification Application Submission Window

Accompanying (As-Is) Screen Shots

N/A

Remove Declarations After Confirmation Of Legal

Owner

Category - PQ Application

*Did not cover in
User Group session
held 4 July 2024.*

EMR DB View:

Must Have
Should Have
Could Have
Won't Have

User Group Position:

Must Have
Should Have
Could Have
Won't Have

Enhancement Description

As a Capacity Provider User,

I want that when I have confirmed in the application that I am the Legal Owner, the system should remove the following declarations: Applicant Declaration, Aggregator Declaration & Legal Owner Declaration

Benefit

So that This would avoid users seeing unnecessary declarations and causing confusion, reducing the amount of text in the application

As-Is: The system does not remove the declarations

Considerations

Frequency Of Use

Medium – during PQ application submission window

Impacted CMU Type(s)

All

First Operational Use

Prequalification Application Submission Window

Accompanying (As-Is) Screen Shots

N/A

Remove “Upload Document” Button Until Document Category Is Selected

[Back to Enhancement Description](#)

My EMR User Management Company Management CMUs & Components Dispute **⚠ please select Document category option** × nationalgridESO Electricity Market Reform Delivery Body

My EMR / Disputes / Raise a Dispute

Dispute ID	Dispute Status	Application ID	Submitted By	Deadline	Quit	Save	Submit Dispute
██████	Created	██████████	Ram Rac	10/03/2024, 14:47			

test

Disputes File Upload

Document Category

The following filetypes are accepted: JPG, PDF, PNG, xls, csv, xlsx max 2Gb

Select an Option

Upload Document

File Name	Document Category	Uploaded Date
-----------	-------------------	---------------

Provide Text Box For Each Rejection Reason

[Back to Enhancement Description](#)

Dispute Reasons

Please confirm your reasons for raising a Dispute against this Application.

Dispute Type
Auction Prequal Decision

Rejected Reasons(s)
F14-7 Declaration that Application is correct not selected
F2-1 Company Address provided in the Application does not match with the Address as shown on Companies House
F4-125 Location specified by the Postcode does not match the OS Grid Reference
F1-5 Invalid Applicant Status selected
F7-7 Name of Applicant or Capacity Provider on Fossil Fuel Emissions Declaration (Exhibit ZA) missing

Conditional Prequalified Reason(s)
No Options Available

Note Code(s)
No Options Available

Other Reasons

Dispute Details

Please provide a concise statement identifying the relevant parts of the item under dispute.
Please accept this dispute

Please provide a concise statement of facts upon which the affected person relies.
Please accept this dispute

Please provide a summary of the grounds for disputing the item selected above.
Please accept this dispute

Please provide a succinct presentation of the arguments supporting each of the grounds for dispute.
Please accept this dispute

Dispute Reasons

Please confirm your reasons for raising a Dispute against this Application.

Dispute Type
Auction Prequal Decision

Rejected Reasons(s)
F14-7 Declaration that Application is correct not selected
F2-1 Company Address provided in the Application does not match with the Address as shown on Companies House
F4-125 Location specified by the Postcode does not match the OS Grid Reference
F1-5 Invalid Applicant Status selected
F7-7 Name of Applicant or Capacity Provider on Fossil Fuel Emissions Declaration (Exhibit ZA) missing

As-Is: Currently, there is only one text box of each type to address all rejection reasons at Disputes.

Duplicate CMU ID Error Message

[Back to Enhancement Description](#)

My EMR / CMU Management / Create a CMU

Select Company

DEEP LLP

Select CMU Type

Existing Generating

CMU Identifier

12360a

CMU Name

Enter your CMU name here. This can be the same as the CMU ID.

12360a

Quit

Next

My EMR

User Management

Company Management

CMUs & Components

Dispute

My EMR / CMU Management / Create a CMU

Select Company

DEEP LLP

Select CMU Type

Existing Generating

CMU Identifier

12360a

CMU with identifier already exists

CMU Name

Enter your CMU name here. This can be the same as the CMU ID.

12360a

Quit

Next

Reorder filter boxes on CMU and Components

[Back to Enhancement Description](#)

My EMR

User Management

Company Management

CMUs & Components

Dispute

Guidance

nationalgridESO

Electricity Market Reform
Delivery Body



My EMR / CMU Management

Create a CMU

Filter Company

- Display All -

Filter CMU Status

- Display All -

Filter CMU Type

- Display All -

Search CMU ID or Name



Status

CMU ID

CMU Name

CMU Type

Company

Components

Application Submitted

More

● Created

TEST DATA

TEST DATA

Existing Generating

TEST DATA

0



● Created

TEST DATA

TEST DATA

Refurbishing Interconnector

TEST DATA

0



● Created

TEST DATA

TEST DATA

Refurbishing Generating

TEST DATA

2



Allow Multiple BMU IDs To Be Input

[Back to Enhancement Description](#)

My EMR User Management Company Management **CMUs & Components** Dispute nationalgridESO Electricity Market Reform Delivery Body

CMU Management / Add Component to CMU CCC111

EMR Demo Company

CMU Type
New Build Generating

CMU Identifier
CCC111

CMU Name
CCC111-NBG

Component Identifier
Enter your unique six-digit Component ID. If you have a Balancing Services ID, enter the unique alphanumeric identifier here, maximum 18 characters long.
CCC111-COMP

Component in the form of CCC111

MPAN/MSID
The Meter Point Administration Number(s) / Metering System Identifier(s) of the meters for this component should be entered.

Characters Left: 500/500

BMU ID
The Balancing Market Unit identifier(s) of the meters for this component should be entered.

Characters Left: 500/500

[Terms and Conditions](#) [Privacy Policy](#) [Modern Slavery Statement](#) [Accessibility](#) [Cookie Policy](#) [Security](#)

Separate “Save And Quit” Button In Application

[Back to Enhancement Description](#)

My EMR User Management **Company Management** CMUs & Components Dispute Guidance nationalgridESO | Electricity Market Reform Delivery Body

My EMR / Company Management / Company Details Refresh Company Details ← Back to Application Page

Successfully Uploaded

Capture.JPG View Delete

Prequalification Certificate (Exhibit A)

☰ Open Exhibit Library ⓘ 📁 Upload Files ⓘ

Certificate of Conduct (Exhibit C)

☰ Open Exhibit Library

🔄 Reuse Exhibit

📁 Upload Files

Save & Close

Arrange Filter Drop-Down Lists Alphabetically In Outstanding Activities

[Back to Enhancement Description](#)

nationalgridESO

Electricity Market Reform
Delivery Body



- Outstanding Activities Acceptable Transferee Requirement Completed Activities



Download CSV

Search CMU ID, Application ID or Agreement ID



Filter Submission Status

- Display All -

- Display All -

Submission Outstanding

Submission Saved

Submitted for Review

Approved

Rejected

Filter Requirement

- Display All -

Deregister Security Interest

CMU Transfer

Change Of Address

Submit DSR Test

Submit Planning Consent

Submit Total Project Spend

Arrange Items On My EMR / Management Activities In Alphabetical Order

[Back to Enhancement Description](#)

ent Company Management CMUs & Components Dispute Guidance

My EMR / Management Activities



Manage Security Interests



CMU Transfer



Change Of Address



Funding Declaration Update



Emissions Related Material Change



Price Maker Status Update



CFD Transfer Notice



Factual Inaccuracy



DSR Test for Proven DSR CMU



Volume Reallocation



Component Primary Fuel Type Update



Bulk Upload

Connection Capacity Calculation Method Visibility

[Back to Enhancement Description](#)

My EMR / CMU Management / Add Component to CMU TEST96

CMU Type

CMU Identifier

CMU Name

Component Identifier

Enter your unique six-digit Component ID. If you have a Balancing Services ID, enter the unique alphanumeric identifier here, maximum 18 characters long.

appropriate technology class for your component. This is used to reference the de-rating factor for the component of the CMU and to calculate the de-rated capacity of the CMU.

Primary Fuel

Please select the relevant Fuel for this component

- Distribution CMU - Estimate in Good Faith
- Distribution CMU - Maximum Export Capacity (MEC)
- Distribution CMU - Maximum Export Capacity (MEC) Pro-Rata
- Historic/Average Output**
- Interconnector CMU - TEC
- Transmission Entry Capacity (TEC)
- Transmission Entry Capacity (TEC) Pro-Rata

Connection Capacity (MW)

This field captures the Connection Capacity for that CMU Component. The value of this field should be larger or equal to 0.000 and should be expressed in MW to 3 decimal places.

 MW

Auto-Calculate Capacity On Application

[Back to Enhancement Description](#)

My EMR

User Management

Company Management

CMUs & Components

Dispute

Guidance

nationalgridESO

Electricity Market Reform
Delivery Body



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

TEST20	Status	Application ID	Applicant Company
Existing Generating	Created	S-ST-1-2023-TEST20-00001	EDF ENERGY HOLDINGS LIMITED

Quit

Save

Submit Application

Application Details - Review

Application Questions

Declarations

Emissions

Company

EDF ENERGY HOLDINGS LIMITED

[View](#)

CMU Type

Existing Generating

[View](#)

Components

1 Components

[View](#)

Connection Capacity Details

Total Connection Capacity (MW)

Anticipated De-Rated Connection Capacity (MW)

[Calculate](#)

Reword LCE Declaration

[Back to Enhancement Description](#)

As-Is:

LCE - Application made but not Determined

By ticking this box I declare that at the time of making the Application an application for the CMU to which the Application relates has been made (but has not yet been determined) for a Low Carbon Exclusion in respect of the CMU, and a Withdrawal Confirmation has been submitted (as required by Rule 3.4.7).

I confirm

New wording as follows:

By ticking this box I declare that:

At the time of making this Capacity Market (CM) Application, an application for the CMU to which the CM Application relates has been made for a Low Carbon Exclusion (LCE). I further declare that at this time a determination has not been made in respect of the LCE Application, and that a Withdrawal Confirmation has been submitted (as required by Rule 3.4.7).

Application Declarations Validation

[Back to Enhancement Description](#)

My EMR | User Management | Company Management | CMUs & Components | Dispute | Guidance | nationalgridESO | Electricity Market Reform Delivery Body

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

TEST20	Status	Application ID	Applicant Company
Existing Generating	Created	[REDACTED]	[REDACTED]

[Quit](#) [Save](#) [Submit Application](#)

Application Details - Review | Application Questions | **Declarations** | Emissions

Standard Declarations

Declaration of Solvency
Each Applicant must declare in the Application that it is not Insolvent at the time of making the Application. By ticking this box the Applicant is making this declaration.

I confirm

LCE - Application made but not Determined
By ticking this box I declare that at the time of making the Application an application for the CMU to which the Application relates has been made (but has not yet been determined) for a Low Carbon Exclusion in respect of the CMU, and a Withdrawal Confirmation has been submitted (as required by Rule 3.4.7).

I confirm

LCE - Current Benefit but not Relevant Year
By ticking this box I declare that at the time of making the Application the CMU to which the Application relates is currently benefitting from a Low Carbon Exclusion(as required by Rule 3.4.7).

I confirm

LCE - No Current Benefit and not Relevant Year
By ticking this box I declare that at the time of making the Application the CMU to which the Application relates is neither accredited under. nor the subject of an application for accreditation under. a

[Terms and Conditions](#) | [Privacy Policy](#) | [Modern Slavery Statement](#) | [Accessibility](#) | [Cookie Policy](#) | [Security](#)