

EMR Delivery Body (DB) New Portal User Group

Prioritisation Update & Requirement Playback

September 2024



#4282929

ESO

Agenda

Prioritisation Update

- Customer Familiarisation Window (CFW) Enhancements & indicative timeline
- Enhancements expected to be taken forward for delivery in Q3 Delivery

Requirement Playback

- Single ID access to Multiple Portfolio's: Consultant Role/Shared Ownership

AOB

Customer Familiarisation Window (CFW) Enhancements & indicative timeline

July /
August
2024

- 18 enhancements impacting external user gathered from CFW (Mar – Apr)
- User Group workshop(s) run to ascertain external user prioritisation value

August
2024

- CFW enhancements reviewed against wider enhancement backlog through internal prioritisation workshops to confirm Q3 Delivery – *further information found in Supporting Information*

September
2024

- Requirement validation for Single ID access to Multiple Portfolio's

October /
November
2024

- Feedback Checkpoint – gather further from Industry post PQ Submission Window closing
- Requirement validation for Q3 enhancements
- Demonstration for Single ID access to Multiple Portfolio's
- Further Prioritisation workshops to determine deliverability of (external user) enhancements for Q4

Enhancements expected to be taken forward for delivery in Q3 Delivery

Auction

Secretary of State adjustments to Auction Parameters

- **What is the change?**
- This change relates to where the Secretary of State makes any adjustment to the Auction Parameters as defined under Regulation 11 relating to (d) onwards.
- **Why are we doing it?**
- Initially, a manual process was in place for New Portal Go-Live. The Delivery Body is now prioritising the automation of the process of re-opening the Opt-out window for Applicants, where changes are made to the Auction Parameters under Regulation 11(d) post Prequalification window closing, means we can ensure an improved and efficient process.

DB Assessment

Assessment Code Conditional Reason field

- **What is the change?**
- To change an open text field, that specifies the PQ conditional reason, within the DB assessment code feature to a drop-down list.
- **Why are we doing it**
- To ensure the conditional reasons remain consistent on results letters and to take advantage of efficiencies within the DB assessment process. The conditional reason is what drives the associated outstanding activities to be created, automating the application of conditional reasons will reduce the time taken to complete the process..

Enhancements expected to be taken forward for delivery in Q3

Drop Down Lists

Alphabetical order of specific drop-down lists

- **What is the change?**
- This change relates to a number of areas where the current drop-down list options are not in alphabetical order, this includes Prequalification Assessment Codes.
- **Why are we doing it?**
- Efficiency and accuracy. With the Prequalification Assessment Codes in particular, there are 494 assessment codes not in a workable order and that will lead to a less efficient assessment but also a higher risk of an incorrect assessment code being selected.

Cloning

Text Amendment

- **What is the change?**
- Helper text amendment for the Asset Group declaration whilst cloning.
- **Why are we doing it**
- Clarification that not selecting the Asset Group declaration will not link the CMUs. In legacy portal all clones were linked, in the New EMR Portal there is the option to not link the clones which allows for multiple copies of the same CMU information to be created with different IDs.

Single ID access to Multiple Portfolio's

Feature Description

On the EMR Portal a customer's email address is their User ID. Therefore, the system won't allow a User to use the same email to register another account in a different Portfolio, and there are Users who need to access multiple Portfolios using the same email address. This feature will enable Single user-ID access for Multi-Portfolios. It will also replace the interim work around solution which is a long process via our IT team, which manually creates different User IDs against one email to enable Users to access different Portfolios.

Customer Feedback Considered

- The current process involves customers emailing the DB and filling out a form which is time consuming as they must wait for the task to be completed from the DB side, when they should be allowed to manage this from their side.

High-level Requirements Proposed

- User will need to be initially registered following the normal User Management process.
- Allow Main Admin, Deputies and Users (excluding Nominated Agent) to request access to a Company/Account that is in a different Portfolio than the one they currently have access to.
- Only Main Admins of the Portfolio account that receives the request can approve or reject the request.
- Email notifications will be sent to the requester and Main Admin approver (i.e. when the request is submitted, approved and rejected).
- Once the request has been approved the User will then have access to the relevant Company, and if they need to be added to further Companies, or the role needs to be changed this can be managed as normal in the User Management section.
- Users should have the ability to switch between Portfolios they have access to without having to log out and log back in.

As a newly registered Main Admin, Deputy or User when you select the **blue User Icon** you only get the option to select **My Profile**, as the User will only have access to the 1 Portfolio during the initial Registration.

The screenshot displays the 'My EMR' dashboard interface. At the top, there is a navigation bar with tabs for 'My EMR', 'User Management', 'Company Management', 'CMU's & Components', and 'Disputes'. A user profile icon in the top right corner is highlighted with an orange box, and a dropdown menu is open, also outlined in orange. The dropdown menu contains the following items:

- Name Name Surname
name.surname@myemail.com
- My Profile
- Log Out

The main content area is titled 'My EMR' and is divided into two columns. The left column is titled 'CMU and Auction Management' and contains several sections:

- Company CMUs**: A complete list of all company CMU's that can be something something something.
- Exhibit Library**: All the Exhibits we require you to provide categorised by each CMU type.
- Outstanding Activities**: Submit required Information and or Documentation Post PQRD.
- Management Activities**: Body copy to be placed in here. Body copy to be placed in here.

The right column contains two tables:

Prequalification /

Title	Type	Year	Action
2022-23 T-1 Capacit	T-4	2027	Apply
[Title]	T-4	2027	Apply
2022-23 T-1	T-1	2023	Apply
[Title]	T-4	2027	Apply

Secondary Trade Entrant

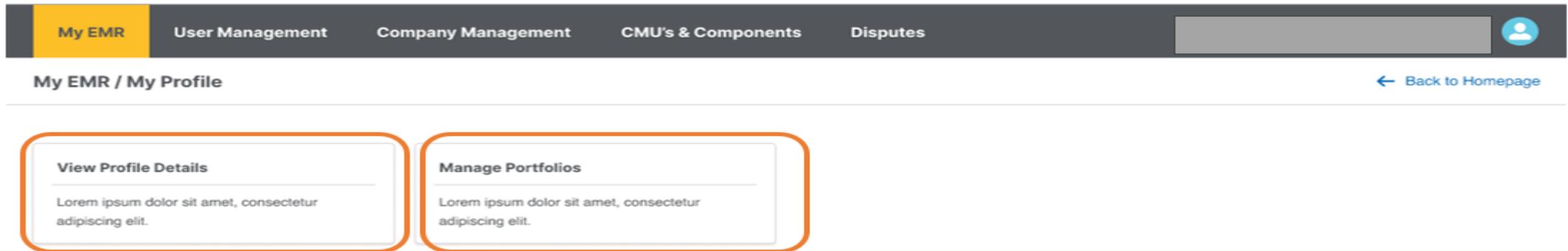
Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	Apply
[Title]	T-4	2027	Apply
[Title]	T-4	2027	Apply

The journey for a Main Admin is slightly different, so we will go through how the feature would work for Deputy and User role first. Please note this process excludes Nominated Agents.

When a Deputy or User selects **My Profile** from the **blue User Icon** they are taken to the below screen with 2 options:

Selecting **View Profile Details** – will show the Deputy or User their profile details and for Deputies with read and write privileges they can make edits to their details.

Selecting **Manage Portfolios** – will take the Deputy or User to a new screen, whereby they can request access to a Company/Account that is in a different Portfolio using the same email address.



Selecting **Manage Portfolios**, the Deputy or User will be taken to a screen where there is a button to ‘**Request Account Access**’, and in this screen, there will be a list of any previous requests made for other Companies with the status of the request.

My EMR / My Profile / ... / My Requests

Request Account Access

Filter Status

- Display All -

Search for Company name

Request Status	Account Name	NGRID ID	Requested Role	More
Submitted	Account Name Long Long Name	NGRID-YY0000000	User	⋮
Approved	Account Name Long Long Name	NGRID-YY0000000	Deputy	⋮

Selecting **Request Account Access** will take the Deputy or User to a form, where they will need to enter the NGRID-ID and Company name will auto populate with the Company they want access to (NGRID-ID is needed), as well as inputting the role they would like. The Privileges the Deputy or User can request is limited to the privileges the Deputy or User currently has in the Portfolio they have access to. Once completed, select **Request Account Access** to submit the request or **Cancel** to leave the form.

The screenshot shows a web application interface with a dark navigation bar at the top containing 'My EMR', 'User Management', 'Company Management', 'CMU's & Components', and 'Disputes'. Below the navigation bar is a breadcrumb trail: 'My EMR / My Profile / ... / Request Account Access'. The main content area is divided into two sections. The top section contains a table with two columns: 'Requester Name' (with subtext 'Firstname Lastname') and 'Username' (with subtext 'Firstnamelastname@email.com'). To the right of this table are two buttons: 'Cancel' and 'Request Account Access', both enclosed in an orange rectangular highlight. The bottom section is a form titled 'Request Account Access' with a placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.' The form contains four input fields: 'NGRID ID' (with the value 'NGRID-YY0000000'), 'Company Name' (with the value 'Company name long name'), 'Requested Role' (a dropdown menu currently showing 'User'), and 'Privileges' (a button labeled 'Read/Write').

Select **Request Account Access** to submit the request or **Cancel** to go back to the form to make any edits.

My EMR User Management Company Management CMU's & Components Disputes

My EMR / My Profile / ... / Request Account Access

Requester Name **Username**
Firstname Lastname Firstname.lastname@email.com

Cancel Request Account Access

Request Account Access

You are about to request access to [Account Name].
Do you want to continue?

Cancel Request Account Access

Company name long name

Once the request has been submitted, the requester will receive a green toaster message confirming the submission. The requester, as well as the Main Admin of the relevant Company that will be approving the request, will receive an email notification confirming the submission.

The screenshot shows a web application interface. At the top, there is a navigation bar with 'My EMR', 'User Management', and 'Com'. A green toaster message is displayed, stating 'You have Submitted an Account Access Request for [Company Name]'. Below the navigation bar, there is a breadcrumb trail 'My EMR / My Profile / ... / My Requests' and a 'Request Account Access' button. A 'Filter Status' dropdown is set to '- Display All -'. A search bar is labeled 'Search for Company name'. Below these elements is a table with the following columns: 'Request Status', 'Account Name', 'NGRID ID', 'Requested Role', and 'More'. The table contains three rows of data.

Request Status	Account Name	NGRID ID	Requested Role	More
Submitted	Account Name Long Long Name	NGRID-YY0000000	User	⋮
Submitted	Account Name Long Long Name	NGRID-YY0000000	Deputy	⋮
Approved	Account Name Long Long Name	NGRID-YY0000000	User	⋮

The Main Admin can access the **View Profile Details & Manage Portfolios** screen similar to Deputies and Users (see slide 3). By selecting **Manage Portfolios** the Main Admin will be taken to the below screen, whereby they can view the **Received Requests** from Deputies and Users that would like access to their Company/Account. They can **Accept** or **Reject** the request by reviewing the details the requester has given. The Main Admin can also request access to another Portfolio by selecting **My Requests** tab and they will follow the same process as described in slides 4 – 7.

My EMR / My Profile / ... / Received Requests

Display: Received Requests My Requests

Filter Status: - Display All -

Search for Company name

Request Status	Requester Name	NGRID ID	Company Name	Email	Phone Number	Request Role	Privileges	More
Submitted	Firstname Longlastname	NGRID-YY0000000	Company Name Long Name	loremipsumlong@email.com	+44 1235 678910	Deputy	Full Admin	Accept Reject
Approved	Firstname Longlastname	NGRID-YY0000000	Company Name Long Name	loremipsumlong@email.com	+44 1235 678910	User	Full Admin	
Approved	Firstname Longlastname	NGRID-YY0000000	Company Name Long Name	loremipsumlong@email.com	+44 1235 678910	Deputy	Full Admin	

Select **Accept Account Access** to approve the requesters access. Select **Cancel** to go back to the list view to review the request details.

The screenshot shows a web application interface with a navigation bar at the top containing 'My EMR', 'User Management', 'Company Management', 'CMU's & Components', and 'Disputes'. Below the navigation bar is a breadcrumb trail 'My EMR / My Profile / ... / Received Requests' and a 'Display:' section with radio buttons for 'Received Requests' (selected) and 'My Requests'. A 'Filter Status' dropdown is set to '- Display All -'. A search box for 'Company name' is present. The main content is a table with columns: Request Status, Requester Name, NG, Request Number, Request Role, Privileges, and More. The table contains several rows with status indicators (Submitted, Approved) and a 'More' menu for each row. A modal dialog is open in the center, titled 'Accept Account Access'. The dialog text reads: 'By accepting this request the relevant User can access [Insert Company Name]. Do you want to continue?'. At the bottom of the dialog are two buttons: 'Cancel' and 'Accept Account Access'. The 'Accept Account Access' button is highlighted with an orange border. The 'More' menu for the first row is also open, showing 'Accept' and 'Reject' options.

Request Status	Requester Name	NG	Request Number	Request Role	Privileges	More
Submitted	Firstname Longlastname	NG	1235 678910	Deputy	Read/Write	⋮
Approved	Firstname Longlastname	NG	1235 678910	User	Read/Write	⋮
Approved	Firstname Longlastname	NG	1235 678910	Deputy	Read/Write	⋮
Approved	Firstname Longlastname	NG	1235 678910	User	Read/Write	⋮
Approved	Firstname Longlastname	NG	1235 678910	Deputy	Read/Write	⋮

By selecting **Accept Account Access**, this will send approval email notifications to the requester and Main Admin approver. The Main Admin approver will also get a green toaster message confirming the approval.

The screenshot shows a web application interface with a dark grey header. On the left, there are navigation tabs: 'My EMR' (highlighted in orange), 'User Management', and 'Com'. A green toaster message is displayed in the top right of the header, containing a checkmark icon and the text 'You have Accepted the Account Access Request for [Requester Name]' with a close button (X). Below the header, the breadcrumb path is 'My EMR / My Profile / ... / Received Requests'. To the right of the breadcrumb, there is a 'Display:' section with two radio buttons: 'Received Requests' (selected) and 'My Requests'. Below this, there is a 'Filter Status' section with a dropdown menu showing '- Display All -'. To the right of the filter is a search box labeled 'Search for Company name' with a magnifying glass icon. The main content area contains a table with the following columns: 'Request Status', 'Requester Name', 'NGRID ID', 'Company Name', 'Email', 'Phone Number', 'Request Role', 'Privileges', and 'More'. There are three rows of data, all with a green 'Approved' status.

Request Status	Requester Name	NGRID ID	Company Name	Email	Phone Number	Request Role	Privileges	More
Approved	Firstname Longlastname	NGRID-YY0000000	Company Name Long Name	loremipsumlong@email.com	+44 1235 678910	Deputy	Read/Write	⋮
Approved	Firstname Longlastname	NGRID-YY0000000	Company Name Long Name	loremipsumlong@email.com	+44 1235 678910	User	Read Only	⋮
Approved	Firstname Longlastname	NGRID-YY0000000	Company Name Long Name	loremipsumlong@email.com	+44 1235 678910	Deputy	Read/Write	⋮

Select **Reject Account Access** to reject the requesters access. Select **Cancel** to go back to the list view to review the request details. By selecting **Reject Account Access**, this will send rejection email notifications to the requester and Main Admin approver. The Main Admin approver will also get a green toaster message confirming the rejection.

The screenshot displays a web application interface with a navigation bar at the top containing 'My EMR', 'User Management', 'Company Management', 'CMU's & Components', and 'Disputes'. Below the navigation bar is a breadcrumb trail 'My EMR / My Profile / ... / Received Requests' and a 'Display:' section with radio buttons for 'Received Requests' (selected) and 'My Requests'. A 'Filter Status' dropdown is set to '- Display All -', and a search box for 'Company name' is present. The main content area shows a table of requests with columns: Request Status, Requester Name, NG, Request Number, Request Role, Privileges, and More. A modal dialog box titled 'Reject Account Access' is centered over the table. The dialog contains the text: 'By rejecting this request the relevant User will not be able to access [Company Name]. Do you want to continue?'. At the bottom of the dialog are two buttons: 'Cancel' and 'Reject Account Access'. The 'More' column of the table has a dropdown menu open for one row, showing 'Accept' and 'Reject' options. The 'Reject Account Access' button in the dialog is highlighted with a red box, and the 'Cancel' button is highlighted with a blue box.

Request Status	Requester Name	NG	Request Number	Request Role	Privileges	More
Submitted	Firstname Longlastname	NG	1235 678910	Deputy	Read/Write	⋮
Approved	Firstname Longlastname	NG	1235 678910	User	Read/Write	⋮
Approved	Firstname Longlastname	NG	1235 678910	Deputy	Read/Write	⋮
Approved	Firstname Longlastname	NG	1235 678910	User	Read/Write	⋮
Approved	Firstname Longlastname	NG	1235 678910	Deputy	Read/Write	⋮

The deactivation of a User from a specific Company or Portfolio can be managed through the standard User Management process.

To deactivate against specific Companies in a Portfolio, the Main Admin or Deputy will need to select **Assign Additional Companies** and update accordingly.

To deactivate against the entire Portfolio, the Main Admin and Deputy will need to select the **Active User** toggle.

The screenshot displays the 'User Management / Edit John Smith' interface. The navigation bar includes 'My EMR', 'User Management', 'Company Management', 'CMUs & Components', and 'Dispute'. The main content area is divided into two columns. The left column contains user details: 'User First Name' (John), 'User Last Name' (Smith), 'User Name' (john...smith000@123outlook.com.cs122cs122.jsmith), 'Email' (john...smith000@123outlook.com), 'Contact Mobile Number' (United Kingdom, 44, 1234567891), and 'Contact Landline Number' (United Kingdom, 44, 1234567891). The right column contains: 'Role' (Deputy), 'Privileges' (Read & Write), 'Primary Company' (DISPUTE DATA LTD), 'Assign Additional Companies' (1), and 'Active User' (checked). A 'Save & Close' button is at the bottom right. On the right side, there are three dropdown menus: 'Role' (Role), 'Privileges' (Privileges), and 'Primary Company' (SHIFT CATCHER LTD). The 'Primary Company' dropdown is open, showing a list of companies: 'Lush - Primary Company', 'Quary', '✓ SHIFT CATCHER LTD', 'THIS IS THE COMPANY WITH THE LONGEST NAME SO FAR...', and 'Total'.

When a Main Admin, Deputy or User with access to multiple Portfolios logs in to the EMR Portal, they can select the relevant Portfolio they would like to manage, or request access to an account via the **blue User Icon** on the top right. Please note the initial **Selected Portfolio** will be the Portfolio the User was initial registered against. Nominated Agents will not have this functionality. To request access to an account, select **My Profile**. To access different Portfolios, select **Switch Portfolios** to navigate to a different Portfolio. The **Selected Portfolio** gives the User an indication of the Company information they are currently accessing.

The screenshot displays the EMR Portal interface. At the top, there is a navigation bar with tabs: **My EMR** (highlighted in yellow), **User Management**, **Company Management**, **CMU's & Components**, and **Disputes**. On the far right of this bar is a blue user icon, which is highlighted with an orange box. A dropdown menu is open from this icon, showing the user's name and email address. Below the name, there are three buttons highlighted with orange boxes: **Selected Portfolio** (with the ID 12345678910), **Switch Portfolios**, and **My Profile**. A **Log Out** button is also present at the bottom of the dropdown. The main content area is titled **My EMR** and contains a grid of management options under the heading **CMU and Auction Management**. These options include: **Company CMUs**, **Exhibit Library**, **Outstanding Activities**, **Management Activities**, **My Applications & Opt-Out Notifications**, **Application Results**, **Delivery Body Notices**, and **Capacity Agreement Notices (CANs)**. On the right side of the main content area, there are two tables. The first table, titled **Prequalification /**, shows auction entries with columns for **Title**, **Type**, **Year**, and **Action**. The second table, titled **Secondary Trade Entrant**, also shows auction entries with the same columns. The **Selected Portfolio** button in the dropdown menu is highlighted with an orange box.

To access different Portfolios, select **Switch Portfolios** on the **blue User Icon**, which will take the User to the below screen, whereby Users can view all the Portfolios they have access to, with the list of Companies they have access to in the relevant Portfolio. There will be a tick box next to the Portfolio the User is currently accessing and **Select** next to the other Portfolios.

Portfolio Name ↓	Main Admin Name ↓	Number of Companies in Portfolio ↓	Select
123455678910	John Doe	4 companies	Select
123455678910	John Doe	20 companies	<input checked="" type="checkbox"/>
123455678910	John Doe	10 companies	Select
123455678910	John Doe	3 companies	Select

To view the list of Companies a User has access to in the relevant Portfolio, select **Number of Companies in Portfolio**, this will open the below screen with the list of Companies in the relevant Portfolio.

My EMR / Switch Portfolios

Filter Main Admin Name
- Display All -

Portfolio Name ↓

Portfolio Name	Number of Companies in Portfolio
123455678910	Select
123455678910	✓
123455678910	Select

Portfolio Companies

[Portfolio Name]

Below is a list of companies you have access to under this portfolio.

Companies in Portfolio	
Company Name Long Name	Company Name Long Name
Company Name Long Name	Company Name Long Name
Company Name Long Name Long Name Long Name	Company Name Long Name
Company Name Long Name	Company Name Long Name
Company Name Long Name Long Name Long Name Long Name	Company Name Long Name Long Name Long Name Long Name
Company Name Long Name	Company Name Long Name
Company Name Long Name	Company Name Long Name
Company Name Long Name	Company Name Long Name
Company Name Long Name	Company Name Long Name
Company Name Long Name	Company Name Long Name
Company Name Long Name	Company Name Long Name
Company Name Long Name	Company Name Long Name

Close

To switch Portfolios the User will click **Select** next to the relevant Portfolio and when the screen below appears, they will select **Switch Portfolio** to access the new Portfolio or **Cancel** to go back to the list of Portfolios.

The screenshot shows a web application interface with a top navigation bar containing 'My EMR', 'User Management', 'Company Management', 'CMU's & Components', and 'Disputes'. Below the navigation bar is a header 'My EMR / Switch Portfolios'. There are two filter boxes: 'Filter Main Admin Name' with a dropdown set to '- Display All -' and a search box 'Search for Portfolio Name'. A table of portfolios is visible, with columns for 'Portfolio Name' and 'Companies'. The table contains six rows, each with a portfolio ID '123455678910' and a 'Select' button. A modal dialog box titled 'Switching Portfolio' is centered over the table. The dialog contains the following text: 'Switching to [Portfolio Name]. If you confirm to Switch Portfolio your site will be refreshed, ensuring your session in the current Portfolio is closed, so that you can only access the selected Portfolio information. Do you want to continue?'. At the bottom of the dialog are two buttons: 'Cancel' and 'Switch Portfolio'. Both buttons are highlighted with orange rounded rectangles. The 'Switch Portfolio' button is blue with white text, while the 'Cancel' button is white with blue text and a blue border.

By selecting **Switch Portfolio**, the User's Portal browser tab will be refreshed, which means the previous Portfolio session is replaced with the new Portfolio session, so the User will need to ensure their previous work is saved before switching Portfolios.

The screenshot displays the 'My EMR' user management interface. At the top, a navigation bar includes 'My EMR' and 'User Management'. A green notification banner with a checkmark icon and a close button (X) reads: 'You have Switched to [Portfolio Name] and now have access to this Porfolio information.' Below the banner, the 'My EMR' section is divided into two main areas. The left area, titled 'CMU and Auction Management', contains four sub-sections: 'Company CMUs' (with a grid icon), 'Exhibit Library' (with a document icon), 'Outstanding Activities' (with a checklist icon), and 'Management Activities' (with a document icon). The right area contains two tables: 'Prequalification Auctions' and 'Secondary Trade Entrant'. Both tables have columns for 'Title', 'Type', 'Year', and 'Action'. The 'Action' column contains 'Apply' links. The 'Prequalification Auctions' table lists entries for '2022-23 T-1 Capacity Auction' and '[Title]' with types 'T-1' and 'T-4' and years '2023' and '2027'. The 'Secondary Trade Entrant' table lists entries for '2022-23 T-1 Capacity Auction' and '[Title]' with types 'T-1' and 'T-4' and years '2023' and '2027'.

My EMR

User Management

You have Switched to [Portfolio Name] and now have access to this Porfolio information. X

My EMR

CMU and Auction Management

Company CMUs
A complete list of all company CMU's that can be something something something.

Exhibit Library
All the Exhibits we require you to provide categorised by each CMU type.

Outstanding Activities
Submit required Information and or Documentation Post PQRD.

Management Activities
Body copy to be placed in here. Body copy to be placed in here.

My Applications & Opt-Out Notifications
Edit and update all your Auction applications related to this company.

Application Results
Body copy to be placed in here. Body copy to be placed in here.

Delivery Body Notices
Body copy to be placed in here. Body copy to be placed in here.

Capacity Agreement Notices (CANs)
Body copy to be placed in here. Body copy to be placed in here.

Prequalification Auctions

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	Apply
[Title]	T-4	2027	Apply
[Title]	T-4	2027	Apply
2022-23 T-1	T-1	2023	Apply
[Title]	T-4	2027	Apply

Secondary Trade Entrant

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	Apply
[Title]	T-4	2027	Apply
[Title]	T-4	2027	Apply

When Nominated Agents select the **blue User Icon** they only get the option to select **My Profile**, as Nominated Agents cannot request access to other Portfolios, to be the Agent for any other Company, unless the other Company is a member of the same Group, and Companies in the same group should be under 1 Portfolio.

The screenshot displays the 'My EMR' interface. At the top, there are navigation tabs: 'My EMR' (highlighted in yellow), 'User Management', 'Company Management', 'CMU's & Components', and 'Disputes'. A user profile icon in the top right corner is highlighted with an orange box, and a dropdown menu is open, also highlighted with an orange box. The dropdown menu shows the user's name 'Name Name Surname', email 'name.surname@myemail.com', and options for 'My Profile' and 'Log Out'.

The main content area is titled 'My EMR' and is divided into two columns. The left column is titled 'CMU and Auction Management' and contains several sections:

- Company CMUs**: A complete list of all company CMU's that can be something something something.
- Exhibit Library**: All the Exhibits we require you to provide categorised by each CMU type.
- Outstanding Activities**: Submit required Information and or Documentation Post PQRD.
- Management Activities**: Body copy to be placed in here. Body copy to be placed in here.

The right column contains two tables:

Prequalification /

Title	Type	Year	Action
2022-23 T-1 Capacit	T-4	2027	Apply
[Title]	T-4	2027	Apply
2022-23 T-1	T-1	2023	Apply
[Title]	T-4	2027	Apply

Secondary Trade Entrant

Title	Type	Year	Action
2022-23 T-1 Capacity Auction	T-1	2023	Apply
[Title]	T-4	2027	Apply
[Title]	T-4	2027	Apply

By selecting **My Profile**, the Nominated Agent is taken to the screen below where they can view their profile details.

View Profile Details

Lorem ipsum dolor sit amet, consectetur adipiscing elit.

An aerial photograph of a river delta, likely the Amazon, showing a complex network of channels and a large plume of white water. Several bright blue lightning bolts are superimposed on the right side of the image, striking the water. The text "Thank you for your time" is overlaid in white at the top.

Thank you for your time

**Are there any
questions?**

Supporting Information

CFW Enhancements – latest position

Sli.do #4282929

Pot 1 - Reviewing options to progress in Q3 (if not, consider potential for delivery in Q4)

Area of Portal	Enhancement Title	Enhancement Summary	High Level Impact Assessment	User Group Prioritisation position	Implementation Option(s) (as of Aug 2024)	Latest Position (as of Sep 2024)
Application	Separate "Save And Quit" Button In Application	Provides the option to save and return to the current application if the user has to navigate away to the Company Screen to make changes instead of being taken back to the Main Company selection screen.	Medium	Could Have	This has been considered as a candidate for Q3 delivery but is subject to further assessment to understand size and complexity of delivery.	Detailed impact assessment still in progress. Not considered for Q3 Delivery. Will revisit in November for Q4 Delivery.
Application	Reword LCE Declaration	Rewords the "LCE Application Made But Not Determined" declaration to make the declaration clearer and less confusing for users completing an application.	Small	Could Have	This has been considered as a candidate for Q3 delivery.	Not considered for Q3 Delivery. Will revisit in November for Q4 Delivery.
CMU	Reorder filter boxes on CMU and Components	Reorders filter boxes on the CMU & Components screen so that they reflect the same order of the columns on the page to make the screen more user friendly.	Medium	Could Have	This has been considered as a candidate for Q3 delivery.	Not considered for Q3 Delivery. Will revisit in November for Q4 Delivery.
Disputes	Include Application / Dispute ID On Disputes Letter File Name	Includes the application / dispute ID in the file name of the Disputes letter so that this would specify the application the disputes letter belongs to in the file name and avoid confusion.	Medium	Could Have	This has been considered as a candidate for Q3 delivery.	Not considered for Q3 Delivery. Will revisit in November for Q4 Delivery.
Management Activities	Arrange Items On My EMR / Management Activities In Alphabetical Order	Allows users to see the items on the My EMR / Management Activities screen arranged in alphabetical order so that it makes it easier to find an item and the organisation of screens is consistent.	Medium	Could Have	This has been considered as a candidate for Q3 delivery. Icons and associated descriptions to accompany the different management activities	Not considered for Q3 Delivery. Will revisit in November for Q4 Delivery.
Outstanding Activities	Arrange Filter Drop-Down Lists Alphabetically In Outstanding Activities	Allows users to have the drop-down lists on the Outstanding Activities screen arranged in alphabetical order so that it is easier to find an item and the organisation of screens is consistent.	Medium	Could Have	This has been considered as a candidate for Q3 delivery.	Not considered for Q3 Delivery. Will revisit in November for Q4 Delivery.
Outstanding Activities	Keep User On Filtered Page When Completing "Submit For Review"	Allows users to remain on the filtered screen when a task is submitted for review "Submit For Review" to avoid losing the filtered information and having to repeat the process of applying the same filters to get back to the same filtered information	Medium	Could Have (High)	This has been considered as a candidate for Q3 delivery.	Not considered for Q3 Delivery. Will revisit in November for Q4 Delivery.

CFW Enhancements – latest position

Sli.do #4282929

Pot 2 - Added to scope for Q4 improvements as part of a wider review of CMU/Application Validation enhancements

Area of Portal	Enhancement Title	Enhancement Summary	High Level Impact Assessment	User Group Prioritisation position	Implementation Option(s) (as of Aug 2024)	Latest Position (as of Sep 2024)
Application	Application Declarations Validation	Prevents the user to submit applications if they have not ticked: Declaration that application is correct; Declaration of solvency; & one of the Low Carbon statuses to avoid users submitting applications which are incomplete, where the above declarations have been missed.	Large	Should Have	This enhancement will be included as part of the Application Validation Feature and therefore be considered for delivery in Q4.	Requirement Validation expected by November 2024
Component	Connection Capacity Calculation Method Visibility	Ensures the option of “Historic/Average Output” for the method to calculate connection capacity only be visible to specific CMU types and removed for all irrelevant CMU types so that it helps avoid users selecting a capacity calculation method which is not applicable to the CMU type they are completing the application for.	Medium	Should Have	This enhancement will be included as part of the Application Validation Feature and therefore be considered for delivery in Q4.	Requirement Validation expected by November 2024
Application	Remove Declarations After Confirmation Of Legal Owner	Removes the following declarations: Applicant Declaration, Aggregator Declaration & Legal Owner Declaration if the user confirmed in the application that they are the Legal Owner.	Medium	Should Have	This enhancement will be included as part of the Application Validation Feature and therefore be considered for delivery in Q4.	Requirement Validation expected by November 2024
Application	Application Declarations Validation	Prevents the user to submit applications if they have not ticked: Declaration that application is correct; Declaration of solvency; & one of the Low Carbon statuses to avoid users submitting applications which are incomplete, where the above declarations have been missed.	Large	Should Have	This enhancement will be included as part of the Application Validation Feature and therefore be considered for delivery in Q4.	Requirement Validation expected by November 2024

CFW Enhancements – latest position

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Pot 3 - Consider for Q4 improvements as part of a later prioritisation process

Area of Portal	Enhancement Title	Enhancement Summary	High Level Impact Assessment	User Group Prioritisation position	Implementation Option(s) (as of Aug 2024)	Latest Position (as of Sep 2024)
Application	Auto-Calculate Capacity On Application	Ensures the system to calculate capacity automatically for CMU application when user clicks on “Create Application” rather than the user having to click “Calculate”.	Medium	Could Have	This has not been considered for Q3 delivery. Not yet confirmed for Q4 delivery. Subject to further updates.	Will revisit in November for Q4 Delivery.
Application	Allow Downloading Of Applications	Provides the functionality to download applications and allows the user to view all the questions and answers submitted in the application via a downloaded copy and viewed offline.	Large	Should Have (High)	This has not been considered for Q3 delivery. Not yet confirmed for Q4 delivery. Subject to further updates.	Will revisit in November for Q4 Delivery.
Security Interest	Provide List Of CMUs To Select From For Security Interests	Allows users to see a list of eligible CMUs to select from to apply security interests in one transaction as appose to uploading the security interest individually for each CMU.	Medium	Could Have	This has not been considered for Q3 delivery. Not yet confirmed for Q4 delivery. Subject to further updates.	Will revisit in November for Q4 Delivery.

CFW Enhancements – latest position

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Pot 4 - DB consider the cost versus value as being disproportionate and are recommending to NOT proceed

Area of Portal	Enhancement Title	Enhancement Summary	High Level Impact Assessment	User Group Prioritisation position	Implementation Option(s) (as of Aug 2024)	Latest Position (as of Sep 2024)
CMU	Duplicate CMU ID Error Message	Notifies a user upon entering a CMU ID for a new CMU which is already taken via an immediate error message, to inform them that it is a duplicate, before having to click 'Next' to move onto the next page.	Medium	Could Have	The value gained from implementing this enhancement does not outweigh the resource taken to develop and therefore are proposing not to progress	N/A
Disputes	Provide Text Box For Each Rejection Reason	Includes text boxes to address each rejection reason received individually which will allow the users to add comments against each individual rejection reason, making it simpler and easier to understand.	Medium - Large	Could Have	This enhancement is considered a significant change to design and process of the Disputes Window. The introduction of Failure Codes will also make it easier to associate reasons for appeal. Based on this information we are proposing not to progress.	N/A
Application Results	Automatically Show All Records On Application Results Page	Allows users to view all records for all auctions when opening the PQ Application Results page.	Large	Could Have	Removing the filters would lead to a decrease in performance of the Application Results screen because of higher latency and therefore are proposing not to progress	N/A
Uploading Documents	Remove "Upload Document" Button Until Document Category Is Selected	Provides visibility of the "Upload Document" button after the document category is selected preventing a potential error by clicking on 'Upload Document' before a category is selected.	Medium	Could Have	The value gained from implementing this enhancement does not outweigh the resource taken to develop and therefore are proposing not to progress	N/A

CFW Enhancements – latest position

Sli.do #4282929

Pot 5 - Already delivered

Area of Portal	Enhancement Title	Enhancement Summary	High Level Impact Assessment	User Group Prioritisation position	Implementation Option(s) (as of Aug 2024)	Latest Position (as of Sep 2024)
Application	Allow Save And Continue With Applications	Allows the user to stay on the same page when the button "Save" is clicked and then to continue with the application rather than automatically being taken back to the Applications grid page (which is the previous screen).	N/A	Should Have	This enhancement has already been delivered as part of an earlier deployment which resolved a previous application scroll bar issue.	N/A