Public

EMR Delivery Body New Portal User Group

Feature Demonstration, CMR Update & Enhancement Prioritisation

November 28 2024

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House Keeping

🎤 **Microphones on mute**

📷 **Cameras off**

⏺ REC **The session will be recorded**

👍 **Slido event code #8929978**

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Agenda

1. Demonstration – Single ID Access to Multiple Portfolios
2. Confirmation on Q3 Portal Delivery
3. Capacity Market Register Update
4. Portal Feedback Summary + Prioritisation
5. Next Steps

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What is a Portfolio?

The Delivery Body describes a Portfolio as a Company registered in the EMR Portal, because once a Company is registered, it will give the Main Admin the opportunity to obtain their User credentials to be able to log in to the EMR Portal.

Additional Companies can be added onto the same account as the original Company registration, and these Companies will be considered as being part of the same Portfolio.

The Main Admin will have access to all the Companies in a Portfolio, and when registering other Users, they can choose to assign specific Companies in a Portfolio to the relevant Deputies and Users.

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Single ID Access to Multiple Portfolio

Why is this feature being delivered?

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Issue

On the EMR Portal, a customer's email address is their User ID. The system won't allow a User to use the same email to register in another Company in a different Portfolio, and there are Users that require access to multiple Portfolios using the same email address to carry out their work.

Impact

Currently we have an interim workaround solution, whereby a User emails the Delivery Body with a completed proforma with the written approval of the Main Admin of the Company they would like access to. The form is processed by the Delivery Body via manually creating different User IDs against the email to enable Users to logon to different Portfolios. This process results in some time delays and is subject to manual error risk.

Resolution

This feature will allow single user-ID access into multiple portfolios, replacing the manual workaround. Users will be able to switch between portfolios without logging out and back into the EMR portal using a single user-ID.

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Feature Demonstration

Adam Lawrence

Please note:

Each section of the demonstration recording will be published on the EMR DB Portal website.

This will complement the Guidance which will be published on the Knowledge Site at the same time of functionality deployment into the Portal.

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Any further questions?

**Please reach out to the team
box.newemr.itteam@nationalenergyso.com
should you need further support.**

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Confirmation on Q3 Portal Delivery

Secretary of State adjustments to Auction Parameters

- 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.
- The Delivery Body is enabling the automation of the process of re-opening the Opt-out window for Applicants

Single ID access to Multiple Portfolio

- Enable Single user-ID access for Multi-Portfolios
- Replaces the interim workaround solution

Alphabetical order of Prequalification Assessment codes

- 518 assessment codes used for PQ Results Decision set in a logical order
- Change enables efficiency and accuracy

Assessment Code Conditional Reason field

- Change to an open text field, that specifies the PQ conditional reason, within the DB Assessment process.
- Ensures that the conditional reasons remain consistent on results letters and takes advantage of efficiencies within the DB assessment process

Process Adoption

- Issue & Resolution
- Enhanced process using operational data in test environment

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Capacity Market Registers

Considerations for future CMR developments (Capacity Market Update April 24):

- A Delivery Year register alongside the main registers for easier visibility

- Provision of a CSV extract options

- Accessing register data via API or relational database format as well as CSV/XLS

- One combined register for all delivery years/auctions

- NEW - Volume of domestic DSR components making registers too large

Based on customer feedback

Latest Enhancements

Combine all CMRs into two datasets - CMU and Component, published on NESO Data Portal https://www.neso.energy/data-portal

- Downloadable as CSV and API access

We will continue to publish individual CMRs on EMR Portal as is

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CMR Enhancement

Combined CMR is the data from all auctions combined into one dataset including the name of the auction. This is split into 2 datasets – CMU and Component, refreshed weekly.
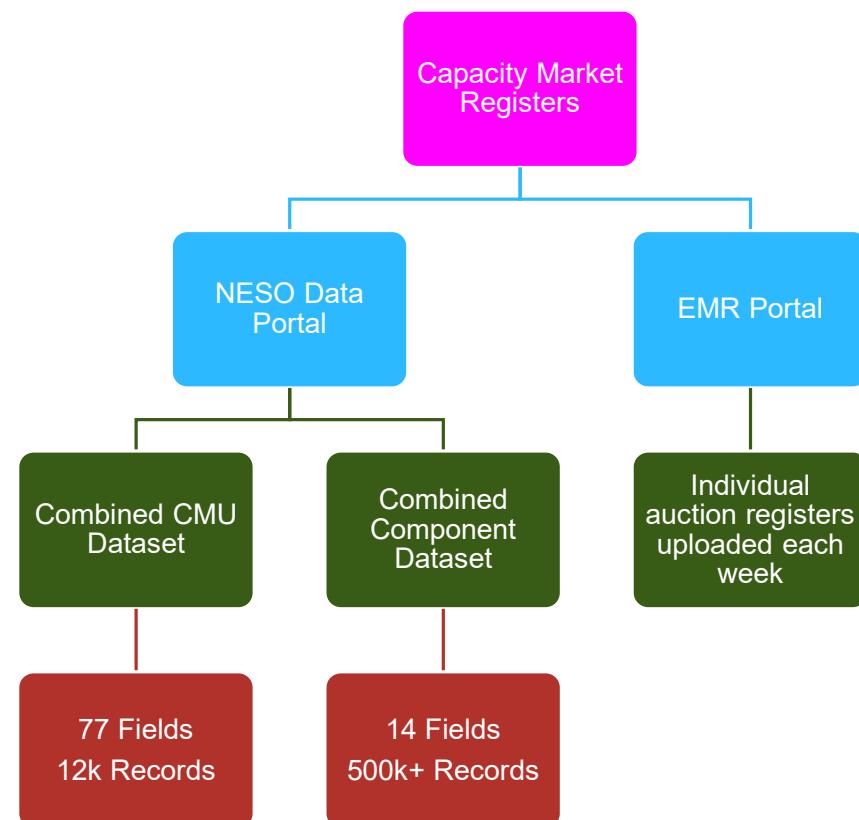
- CMU dataset will have all fields relevant for CMUs including auction name (77 fields)

- Component dataset will have all fields relevant for Components (14 fields) including joining key to CMU dataset (Auction Name, CMU ID and Type)

Component Fields: *Auction Name, CMU ID, Type, Component ID, Generating Technology Class, Permitted on-Site Generating Unit, Primary Fuel of Generating Unit or Permitted on-Site Generating Unit, Connection Capacity / DSR Capacity, Generating Capacity of on-site Generating Unit, De-Rated Capacity, Pre-Refurbishing De-Rated Capacity, Post-Refurbishing De-Rated Capacity, Description of CMU Components, Location and Post Code, OS Grid Reference*

CMU Fields: *Auction Name, CMU ID, Connection Capacity / DSR Capacity, De-Rated Capacity, Pre-Refurbishing De-Rated Capacity, Post-Refurbishing De-Rated Capacity and all remaining fields, excluding those in the component table*

Size benefits

Current published registers - combined	150MB
CMU CSV	5MB
Component CSV	57MB

```
Capacity Market Registers
├── NESO Data Portal
│   ├── Combined CMU Dataset
│   │   └── 77 Fields  12k Records
│   └── Combined Component Dataset
│       └── 14 Fields  500k+ Records
└── EMR Portal
    └── Individual auction registers uploaded each week
```

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Capacity Market Registers

- A Delivery Year register alongside the main registers for easier visibility

- Provision of a CSV extract options ✓

- Accessing register data via API or relational database format as well as CSV/XLS ✓

- One combined register for all delivery years/auctions ✓

- Volume of domestic DSR components making registers too large ✓

<u>Next Steps:</u>
- Aiming for launch January 2025
- More details closer to the launch
    - Tiding up field names, removing line feeds, trailing spaces etc
    - Consistent Auction names
    - Including expired auctions?
- Review Customer Portal Survey for potential improvements

If you have any further questions regarding the CMR changes, please do not hesitate to reach out to the team to discuss further. Please email emr@nationalenergyso.com

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Portal Survey Update

The Portal Survey was sent to all active Capacity Market Portal Users.

The Portal Survey was open for 4 weeks from 15 October 2024 to 11 November 2024.

Surveys completed - 36

Organisations represented – 32

Responders represent approximately 50% of active CM agreement capacity

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Survey Summary Output

How would you rate the performance of the New Portal	Median Score – 8
Please rate your experience of using the new Knowledge Site	Median Score – 8
How would you rate your overall experience	Median Score – 7.5

Challenges & Improvements

71 separate comments have been merged into 10 different areas of consolidated requirements

For more details of the Survey Results, please head to the 'Continuous Improvement' section of the EMR DB Portal website.

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We need your help to prioritise

A low value represents a minor user improvement

A high value represents significant process enhancement

We have taken the overall feedback customers provided in the survey and grouped them together into logical requirement areas. We are now keen to make sure the most valuable enhancements for you are prioritised. To help us do this, we need your input on the area

Each area will require a prioritisation value. We are also looking for the top three areas of importance.

We intend to distribute a survey link to the wider customer community.

Give your rating

13

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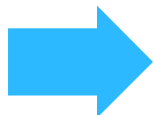# What's coming next?

December 2024

- Deployment of Single ID Access to Multiple Portfolio feature
- Engagement to commence with existing customers to support transition

Late Dec 2024 / Early Jan 2025

- Confirmation of Q4 Delivery Scope
- Customer Enhancement Prioritisation
- Q4 Feature Requirement playback session

Jan 2025

- Customer Enhancement Prioritisation
- Q4 Feature Requirement playback

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Thank you for your time

Please look out for the prioritisation survey.

We will be sending the link via email.

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Customer Enhancement

User Interface improvements

Consolidated Requirements

Portal Navigation & Layout

- A search bar available on the screen to help find areas quicker and easier,

- The ability to open pages on additional tabs

- Additional interlinked functionality. E.g. moving directly from the CMU page to a linked application.

- Capability to access CMU Components when viewing the CMU

- Return to page instead of defaulting back to the My CMU screen

- Easier to see attachments

- De-cluttering pages, i.e Company page

- Formatting issues & inconsistencies

- Colour scheme adjustments to enhance ease of use, particularly for first-time users entering the market.

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Customer Enhancement

User Interface improvements

Consolidated Requirements

Bulk Upload functionality

- Functionality that allows the user to upload lots of information required in the portal. i.e bulk upload letters/documents, settlement period information

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Customer Enhancement

Filtering

Consolidated Requirements

Filtering options & memory

- Increased filtering options for CMU/Application/Agreement
- Retaining filtering when navigating. i.e the ability to retain the filter on the company that a user has selected to avoid resetting when moving back and forth between CMUs.

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Customer Enhancement

Data Exports

Consolidated Requirements

Data Exports

- Export/download Applications for checking prior to final submission

- Export/download Applications after submission

- Have a reporting function to export data, in CSV format, from all areas including Applications, Results, Agreements awarded, Disputes, Capacity Commitments, CMUs & Components

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Customer Enhancement

CMU Management

Consolidated Requirements

CMU Management

- To clone a CMU from New Build to Existing, or from Unproven to Proven rather than start a new one from scratch

- To have the CMU derated capacity or connected capacity displayed on the CMU screen as opposed to going into each component which is an issue with multi component CMUs

- The ability to create CMUS & Components in bulk rather than manually add each one individually

- Access a component via the CMU

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Customer Enhancement

Digital Signatures

Consolidated Requirements

Digital Signatures

- The ability to recall or amend a document out for signature rather than having to cancel and regenerate

- Have a longer Conga signature request expiry limit (currently set at one week)

- Have an electronic signature process that doesn't involve needing Directors' phone details as they can be unwilling/slow to share such details and then they must access passcodes to complete the transaction

- A two stage process to signing off exhibits

21

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Customer Enhancement

Portal Notifications & Warnings

Consolidated Requirements

Portal Notifications & Warnings

- Have consistency in notification recipients. It would be easier if notifications went to all user types

- Remove old CMUs from portal warning notifications

- Have non-completion warnings if questions haven't been answered or documents not uploaded

- Have more information in the e mail notifications, such as when receiving updates on a prequal submission status change, it would be very helpful to outline the latest status in the email

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Customer Enhancement

Portal Log In Timeout

Consolidated Requirements

Portal Log In Timeout

- Have a longer period before the portal automatically logs me out for inactivity.

- Allows more time to consult with guidance documents on topics

23

Customer Enhancement

Outstanding Activities Function

Consolidated Requirements

Outstanding Activities Function

- Be able to delete / archive uncompleted trades and other non-relevant items to 'cleanse' the Outstanding Activities tab

24

Customer Enhancement

PQ Application Process

Consolidated Requirements

PQ Application Process

PQ Application Process

- Click rate reduction – have fewer 'clicks' to complete application processes

- Only have questions showing that are relevant to our applications

- Be able to upload zip files within the emissions section of the Pre-Qualification application, to upload emissions verification documents, serial plates and calculation sheets in bulk

- Have all the questions visible on the same page for each section rather than in a 'nested' format

25

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Further Feedback

You can find further feedback from the recent Portal Survey in regards to the Capacity Market Register and Knowledge Site on the following slides.

Customer Enhancement

Regulatory Reports

Consolidated Requirements

27

Regulatory Reports – Capacity Market Registers

- Access a database where you can run queries rather than accessing multiple registers

- Have a common naming convention for all registers rather than some referring to the auction year and some to the Delivery Year. This would make filtering and searching simpler

- Have CMRs improved by making it easier to link components/CMUs between auctions.

- Easily track Secondary trades in terms of who sells what volume to whom

- Easily find the location of the CMRs

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Customer Enhancement

Guidance & Knowledge Site

Consolidated Requirements

Guidance & Knowledge Site

- Have end-to-end guidance documents in addition to individual tasks/elements, so that providers can download them, and use start to finish, rather than having to go into every task to get a full picture

- Have flow charts on the home pages with docs/links attached at stages rather than just a list of guide documents. A much more visual approach

- Search by CM Rule and see which bits of guidance relate to the given Rule

- Have a full end to end "CM prequal guidance document" for each technology type would be useful as before

- Have improved guidance on cloning to fully understand purpose and constraints constraints and on Opt out options to clarify the Interaction between Opt Out, Agreements & Applications

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