

Public

Portal Filters User Guide

External Process Guide
29/01/2025 v1

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Project Filters

1. The Project Filters that have been created in the portal are shown below. Some of the different filter tabs have a default filter selection.

Projects

Q Search project name [Hide filters](#)

Sort by: Project name A-Z

Company: All

Contract type: All

Project stage: All

Planning consents: All

Operational notification: All

Completion date from: DD/MM/YYYY

Completion date to: DD/MM/YYYY

2. The Sort by filter has 2 options with Project name A-Z being the default filter.

Sort by

Project name A-Z

- ✓ Project name A-Z
- Project name Z-A

3. The Company filter only appears for those accounts that have Parent/Child accounts or if they are a consultant. The default filter is All.

Company

All

- ✓ All
- STR LIMITED
- LOUIS VUITTON UK LIMITED

4. The Contract type filter has the following 3 options. The default filter is All.

Contract type

All ▼

✓ All

BCA - Bilateral Connection Agreement

BEGA - Bilateral Embedded Generation Agreement

BELLA - Bilateral Embedded Licence Large Agreement

5. Planning consents has the following 6 options. The default filter is All.

Planning consents

All ▼

✓ All

Consented

Application submitted

Multiple consents

Not started

Not applicable

6. Operational notification has the following 6 options. The default filter is All.

Operational notification

All ▼

✓ All

EON

ION

LON

FON

n/a

7. The Project stage filter has the following 6 options and the default filter is All.

Project stage

All ▼

- ✓ All
- Pre-Commissioning
- Construction/Commissioning
- At Risk
- Built/Operational
- Closed

8. The date filters have a calendar style option for picking the date that's relevant to the customer.

Completion date from

DD/MM/YYYY 📅

← January → 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today

Completion date to

DD/MM/YYYY 📅

← January → 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today

9. When there is no related Parent/Child account then then the Company filter will not appear.

Projects

🔍 Search project name ⚙️ Hide filters

Sort by: Project name A-Z ▼

Contract type: All ▼

Project stage: All ▼

Planning consents: All ▼

Operational notification: All ▼

Completion date from: DD/MM/YYYY 📅

Completion date to: DD/MM/YYYY 📅

- When you navigate away from the Project page or refresh the Project page the filters are maintained however when you log out of the portal, the selected filters are cleared.
- If you select an **earlier date** in the **Completion date to** field than the date in the **Completion date from** field the following error message can be seen below, also this applies when you select a **later date** in the **Completion date from** field than the date in the **Completion date to** field.

Completion date from	Completion date to
<input type="text" value="30/01/2025"/>	<input type="text" value="14/01/2025"/>
<p style="color: red;">Date must be in between "Completion date from" and today</p>	

- You can also select multiple filters and the selected filter options work in conjunction with each other so that when several filters are applied, only the Project(s) that meet all the selected filter conditions are visible.

Projects

Hide filters (3)
Clear all filters

Sort by

Contract type

Project stage

Planning consents

Operational notification

Completion date from

Completion date to

Pre-application Filters

- When you go to the Applications tab and then the Pre-applications sub tab you can see the different filters that have been created.

Applications

Sort by
Company
Application status
Date created from
Date created to

4 pre-application(s)



<p>213131 STR LIMITED</p> <p>Submitted</p> <p>No longer editable</p> <p>APP-005960 Pre-application</p> <p>View details →</p>	<p>3401410pro STR LIMITED</p> <p>Draft</p> <p>APP-005963 Pre-application</p> <p>View details →</p>	<p>412031test STR LIMITED</p> <p>Processing</p> <p>No longer editable</p> <p>APP-005962 Pre-application</p> <p>View details →</p>	<p>projecto STR LIMITED</p> <p>Submitted</p> <p>No longer editable</p> <p>APP-005961 Pre-application</p> <p>View details →</p>
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14. The Sort by filter has 2 options with Project name A-Z being the default filter.

Pre-applications Applications

Sort by

- Project name A-Z
- ✓ Project name A-Z
- Project name Z-A

15. The Company filter only appears for those accounts that have Parent/Child accounts or if they are a consultant. The default filter is All.

Pre-applications Applications

Q Search project name or application ID Hide filters

Sort by Project name A-Z

Company All

4 pre-application(s)

All
 STR LIMITED
 LOUIS VUITTON UK LIMITED

16. The Application status filter has the following 7 options. The default filter is All.

Pre-applications Applications

Q Search project name or application ID Hide filters

Sort by Project name A-Z

Company All

Application status All

4 pre-application(s)

All
 Draft
 Submitted
 Processing
 Meeting set
 Closed
 Withdrawn

213131 STR LIMITED Submitted

3401410 STR LIMITEC Draft

- The date filters have a calendar style option for picking the date that's relevant to the customer.

Home | Applications

Applications

Pre-applications Applications

Search project name or application ID Hide filters

Sort by Company Application status

Project name A-Z All All

DD/MM/YYYY DD/MM/YY

Format: 31/12/2024

NESO Overview Projects Applications Users Queries

Home | Applications

Applications

Pre-applications Applications

Search project name or application ID Hide filters

Sort by Company Application status Date created from

Project name A-Z All All DD/MM/YYYY

DD/MM/YYYY

Format: 31/12/2024

4 pre-application(s)

- When there are no related Parent/Child accounts then then the Company filter will not appear.

Home | Applications

Applications

Pre-applications Applications Modification notices

Search project name or application ID Hide filters

Sort by Application status Date created from Date created to

Project name A-Z All DD/MM/YYYY DD/MM/YYYY

19. When you select a future date in either date selection filters then the below error message will appear.

Pre-applications Applications Modification notices

Search project name or application ID Hide filters (1) Clear all filters

Sort by Application status Date created from Date created to

Project name A-Z All 11/02/2025 DD/MM/YYYY

Date must be today or earlier

Home | Applications

Applications

Pre-applications Applications Modification notices

Search project name or application ID Hide filters (1) Clear all filters

Sort by Application status Date created from Date created to

Project name A-Z All DD/MM/YYYY 28/02/2025

Date must be today or earlier

20. If you select an **earlier date** in the **Date created to** field than the date in the **Date created from** field the following error message can be seen below, also this applies when you select a **later date** in the **Date created from** field than the date in the **Date created to** field.

Pre-applications Applications Modification notices

Search project name or application ID Hide filters (2) Clear all filters

Sort by Application status Date created from Date created to

Project name A-Z All 27/01/2025 22/01/2025

Date must be in between "Date created from" and today

- When you navigate away from the Pre-applications page or refresh the page the filters are maintained however when you log out of the portal, the selected filters are cleared. This is consistent with the Project filters.
- You can also select multiple filters and the selected filter options work in conjunction with each other so that when several filters are applied, only the Pre-application(s) that meet all the selected filter conditions are visible.

The screenshot shows the 'Pre-applications' page with the following elements:

- Navigation tabs: [Pre-applications](#) (active) and [Applications](#).
- Search bar: Search project name or application ID.
- Filter controls: Hide filters (4) and Clear all filters.
- Buttons: New pre-application.
- Filters:
 - Sort by: Project name A-Z
 - Company: STR LIMITED
 - Application status: Draft
 - Date created from: 06/01/2025
 - Date created to: 16/01/2025
- Summary: 1 pre-application(s)
- Application Card:
 - ID: 3401410pro
 - Company: STR LIMITED
 - Status: Draft
 - APP-005963
 - Pre-application
 - View details →

Application Filters

- When you go to the Applications tab and then the Applications sub tab you can see the different filters that have been created when you click on show filters.

The screenshot shows the 'Applications' page with the following elements:

- Navigation tabs: [Pre-applications](#) and [Applications](#) (active).
- Search bar: Search project name or application ID.
- Filter controls: Hide filters.
- Filters:
 - Sort by: Project name A-Z
 - Company: All
 - Application type: All
 - Connection location: All
 - Application status: All
 - Date created from: DD/MM/YYYY
 - Date created to: DD/MM/YYYY

24. The Sort by filter has 2 options with Project name A-Z being the default filter.

Applications

Pre-applications [Applications](#)

Q Search project name or appli

Sort by

Project name A-Z

Project name A-Z

Project name Z-A

25. The Company filter only appears for those accounts that have Parent/Child accounts or if they are a consultant. The default filter is All.

Applications

Pre-applications [Applications](#)

Q Search project name or application ID [Hide filter](#)

Sort by

Project name A-Z

Date created from

DD/MM/YYYY

48 application(s)

Company

All

All

STR LIMITED

LOUIS VUITTON UK LIMITED

26. The Application Type filter has the following 5 options. The default filter is All.

Applications

Pre-applications [Applications](#)

Q Search project name or application ID [Hide filters](#)

Sort by

Project name A-Z

Date created from

DD/MM/YYYY

48 application(s)

Company

All

Application type

All

All

Directly Connected

BEGA Distribution Connected

BELLA Distribution Connected

Modification

27. The Connection location filter has the following 3 options. The default filter is All.

Applications

Pre-applications [Applications](#)

Q Search project name or application ID [Hide filters](#)

Sort by: Project name A-Z

Company: All

Application type: All

Connection location: All

Date created from: DD/MM/YYYY

Date created to: DD/MM/YYYY

Connection location dropdown options:

- ✓ All
- England & Wales
- Scotland

28. The Application status filter has the following 10 options. The default filter is All.

Q Search project name or application ID [Hide filters](#)

Sort by: Project name A-Z

Company: All

Application type: All

Connection location: All

Application status: All

Date created from: DD/MM/YYYY

Date created to: DD/MM/YYYY

48 application(s)

Application status dropdown options:

- ✓ All
- Draft
- Submitted
- Processing
- Offer in progress
- Contracted
- Offer Lapsed
- Offer Referred
- Withdrawal pending
- Withdrawn

Application cards:

- abcdefg STR LIMITED Offer in progress
- BEGA TEST STR LIMITED Draft
- BEGA TEST22 STR LIMITED Draft

29. The date filters have a calendar style option for picking the date that's relevant to the customer.

Date created from

DD/MM/YYYY

January 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today

Date created to

DD/MM/YYYY

January 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today

30. When there are no related Parent/Child accounts then the Company filter will not appear.

Applications

Pre-applications Applications Modification notices

Sort by: Project name A-Z |
 Application type: All |
 Connection location: All |
 Application status: All |
 Date created from: DD/MM/YYYY

Date created to: DD/MM/YYYY

31. When you select a future date in either date selection filters then the below error message will appear.

Applications

Pre-applications Applications

Sort by: Project name A-Z |
 Company: All |
 Application type: All |
 Connection location: All |
 Application status: All

Date created from:
 Date created to: DD/MM/YYYY

Format: 31/12/2024
 Date must be today or earlier

Applications

Pre-applications Applications

Sort by
Company
Application type
Connection location
Application status

Date created from
Date created to

Format: 31/12/2024
Date must be today or earlier

32. If you select an **earlier date** in the **Date created to** field than the date in the **Date created from** field the following error message can be seen below, also this applies when you select a **later date** in the **Date created from** field than the date in the **Date created to** field.

[Home](#) | [Applications](#)

Applications

Pre-applications Applications

Sort by
Company
Application type
Connection location
Application status

Date created from
Date created to

Date must be in between "Date created from" and today

33. When you navigate away from the Applications page or refresh the page the filters are maintained however when you log out of the portal, the selected filters are cleared. This is consistent with the other filters.
34. You can also select multiple filters and the selected filter options work in conjunction with each other so that when several filters are applied, only the Application(s) that meet all the selected filter conditions are visible.

Applications

Pre-applications Applications

Q Search project name or application ID

Hide filters (6)

Clear all filters

New application

Sort by: Project name A-Z | Company: STR LIMITED | Application type: Directly Connected | Connection location: England & Wales | Application status: Draft

Date created from: 07/01/2025 | Date created to: 30/01/2025
Format: 31/12/2024

5 application(s)



<p>DCc11</p> <p>STR LIMITED</p> <p>Draft</p> <hr/> <p>APP-006032</p> <p>Directly Connected</p> <p>View details →</p>	<p>rthyghnv</p> <p>STR LIMITED</p> <p>Draft</p> <hr/> <p>APP-006015</p> <p>Directly Connected</p> <p>View details →</p>	<p>sting</p> <p>STR LIMITED</p> <p>Draft</p> <hr/> <p>APP-005973</p> <p>Directly Connected</p> <p>View details →</p>	<p>TEST144</p> <p>STR LIMITED</p> <p>Draft</p> <hr/> <p>APP-006021</p> <p>Directly Connected</p> <p>View details →</p>
<p>Test434455</p> <p>STR LIMITED</p>			

Open queries Filters

35. When you go into the Queries tab and then into the Open queries sub tab you can see the different filters that have been created when you click on show filters.

Query management

Open queries Closed

Q Search Query

Hide filters

Sort by: Select one option | Company: Select one option | Question type: Select one option | Case reason: Select one option | Date created from: DD/MM/YYYY

Date created to: DD/MM/YYYY

36. The Sort by filter has 2 options with no default filter.

Sort by

Select one option ▼

Case Number (Asc)

Case Number (Des)

37. The Company filter only appears for those accounts that have Parent/Child accounts or if they are a consultant.

Company

All ▼

✓ All

NATIONAL TRAINING
ACADEMY LTD

NIV LIMITED

STR LIMITED

38. Question type status filter has the following 4 options.

Question type

Select one option ▼

Pre-application related question

Application related question

Project related question

General question

39. Case reason status filter has the following 7 options.

Case reason

Select one option ▼

Application Fees

Charging Appendices

Connections Registers

Contract Clause Query

Other

Process Query

Securities

40. The date filters have a calendar style option for picking the date that's relevant to the customer.

The screenshot shows a web interface with several filters: 'Sort by' (Case Number (Des)), 'Company' (All), 'Question type' (All), 'Case reason' (All), 'Date created from' (DD/MM/YYYY), and 'Date create' (DD/MM/YY). Below the filters, it indicates '6 queries'. A list of queries is shown, with the first one selected: 'Abdul-Basit Ali', 'TEST', 'Case 00083900', '0 answers'. A detailed view of this query is shown on the right, including the case number 'Case 00083900', the user 'Abdul-Basit Ali, 30/1/2025', and the question 'TEST' with the answer 'Test'. A calendar for January 2025 is open, showing the date '30' selected.

This screenshot is similar to the previous one, but the 'Date created to' filter is active, showing 'DDMMYYYY' in the input field. The calendar is still open, showing the date '30' selected.

41. When you navigate away from the Queries page or refresh the page or log out the selected filters are cleared.
42. You can also select multiple filters and the selected filter options work in conjunction with each other so that when several filters are applied, only the Open Query(s) that meet all the selected filter conditions are visible.

Open queries **Closed**

Search Query Hide filters (5) Clear all filters

Sort by: Case Number (Des) | Company: NATIONAL TRAININ... | Question type: General question | Case reason: Application Fees | Date created from: 30/12/2024 | Date created to: 30/01/2025
Format: 31/12/2024

1 query

Abdul-Basit Ali

TEST

Case 00083900

0 answers

Case 00083900

Abdul-Basit Ali, 30/1/2025

TEST

Test

43. When you go into the Queries tab and then into the Closed queries sub tab you can see the different filters that have been created when you click on show filters.

44. Closed queries has the exact same filters options set up as the Open queries.

Application Document Filters

45. To get to the Application Document Filters, you will need to go through any application that is not in Draft.

Applications

Pre-applications **Applications**

Search project name or application ID Show filters New application

36 application(s) Grid List

<p>abcdefg</p> <p>STR LIMITED</p> <p>Offer in progress Lock</p> <p>APP-005972</p> <p>Directly Connected View details →</p>	<p>BEGA TEST</p> <p>STR LIMITED</p> <p>Draft</p> <p>APP-005968</p> <p>BEGA Distribution Connected View details →</p>	<p>BEGA TEST22</p> <p>STR LIMITED</p> <p>Draft</p> <p>APP-006030</p> <p>BELLA Distribution Connected View details →</p>	<p>BEGA TEST333</p> <p>STR LIMITED</p> <p>Draft</p> <p>APP-006031</p> <p>BEGA Distribution Connected View details →</p>
<p>begatesr</p> <p>STR LIMITED</p> <p>Offer in progress Lock</p> <p>APP-005965</p> <p>BEGA Distribution Connected View details →</p>	<p>BELLA rev111</p> <p>STR LIMITED</p> <p>Withdrawn Lock</p> <p>APP-006027</p> <p>BELLA Distribution Connected View details →</p>	<p>DCc11</p> <p>STR LIMITED</p> <p>Draft</p> <p>APP-006032</p> <p>Directly Connected View details →</p>	<p>REV Shared QA issue test CC</p> <p>STR LIMITED</p> <p>Offer lapsed Lock</p> <p>APP-006026</p> <p>Directly Connected View details →</p>

46. After going into the application, you need to scroll down and click on View all documents.

- ✔

Section E

Enabling Works

>
- ✔

Section F

Standard planning data

>
- ✔

Declaration of Acceptance

Review and accept

>

Fee Calculator

When you have completed all the required fields, the Fee Calculator tool will help you estimate the cost of your application fee.

£37,600.00
[View details](#)

Application documents

You have 4 documents uploaded to this application.

[+ Add documents](#)
[View all documents](#) →

Billing information

You have submitted your application. A copy of your invoice will be available here once raised.

47. This will take you to the Application documents page. You will then need to click Show filters.

Home | Applications | APP-005972 | Application documents

← Back

Application documents

abcdefg

You can see all documents you have uploaded for APP-005972 here.

⚙️ Show filters

Add new document

4 document(s)

Document name	File size	File type	File location	File description	Uploaded by	Date uploaded	
ESOCPP_DRC_V1_4 (42)	89.72 kB	.XLSM	Section F, Q2	Single line diagram	Abdul-Basit Ali	16/01/2025	Download
ESOCPP_DRC_V1_4 (42)	89.72 kB	.XLSM	Section F, Q1	DRC data package	Abdul-Basit Ali	16/01/2025	Download
ESOTEAM-14357 UAC v1	29.16 kB	.DOCX	Section B, Q5	Letter of Authority	Abdul-Basit Ali	16/01/2025	Download
ESOCPP_DRC_V1_4 (41)	89.72 kB	.XLSM	Section B, Q2	Connection site plan	Abdul-Basit Ali	16/01/2025	Download

48. The filters you will see are shown below.

Application documents

abcdefg

You can see all documents you have uploaded for APP-005972 here.

Q Search Hide filters

Sort by Location Date uploaded from Date uploaded to

Date uploaded (Des) All DD/MM/YYYY DD/MM/YYYY

49. The Sort by filter has 6 options with Date uploaded (Des) being the default filter.

Q Search

Sort by

Date uploaded (Des)

- Date uploaded (Asc)
- ✓ Date uploaded (Des)
- Document name (A-Z)
- Document name (Z-A)
- File location (A-Z)
- File location (Z-A)

50. For a Directly connected or BEGA application, the options for Location are as shown below.

Location

All

- ✓ All
- Section A
- Section B
- Section C
- Section F
- Supporting document
- Uploaded by NESO

51. For a BELLA application, the options for Location are as shown below.

Location

All ▼

- All
- Section A
- Section B
- Section E
- Supporting document
- Uploaded by NESO

52. For a Modification application, the options for Location are as shown below.

Location

All ▼

- All
- Section A
- Section B
- Section F
- Supporting document
- Uploaded by NESO

53. For a Project Progression or Statement of Works application, the options for Location are as shown below.

Location

All ▼

- All
- Section A
- Section B
- Section D
- Supporting document
- Uploaded by NESO

54. The Date uploaded from and to options have the same options for dates as the Open and Closed queries filters.
55. You can also select mutiple filters and the selected filter options work in conjunction with each other so that when several filters are applied, only the Application Document(s) that meet all the selected filter conditions are visible.

Application documents

Bredbury GSP

You can see all documents you have uploaded for APP-002102 here.

Hide filters (2)
Clear all filters

Add new document

Sort by

Date uploaded (Des) ▼

Location

Uploaded by NESO ▼

Date uploaded from

DD/MM/YYYY 🗑️

Date uploaded to

30/01/2025 🗑️

2 document(s)

Document name	File size	File type	File location	File description	Uploaded by	Date u
0080275325 - Bredbury GSP	37.04 kB	.PDF	Uploaded by NESO	ESO application fee invoice to customer	Jamie Cheshire	10/08/
APP-002102 Project Progression Application Form.pdf	905.39 kB	.PDF	Uploaded by NESO		System Admin	04/08/