EMR Delivery Body New Portal User Group

Feature Demonstration & Feature Requirement playback

27 March 2025

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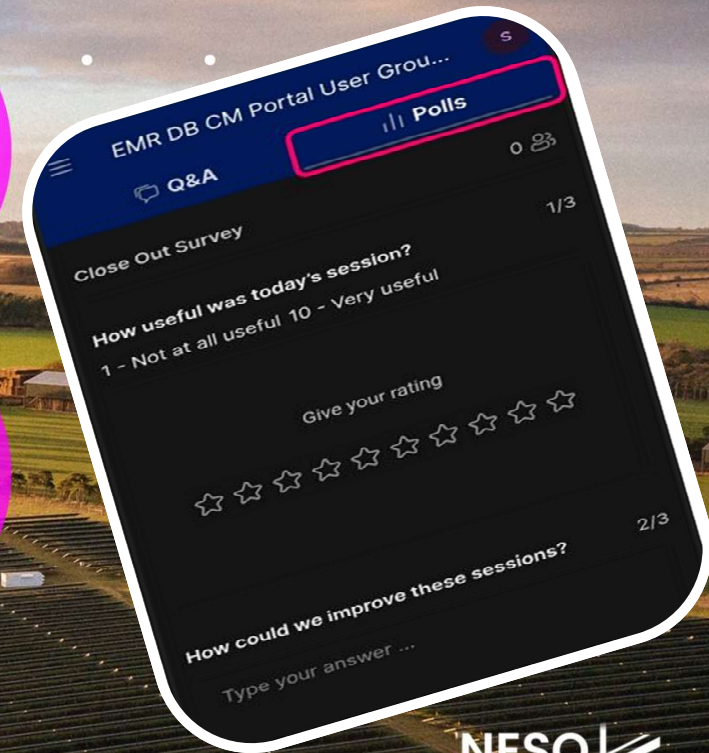System Operator

House Keeping

🎤 **Microphones on mute**

📷 **Cameras off**

🔴REC **The session will be recorded**

👍 **Slido event code #882998**

NOW CLOSED

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Agenda

Demonstration

- Emissions Chapter

Requirement Playback

- Company Transfer

- CMU Type Change

- Print & Export PQ/ST Application

- CMU & Component Improvements
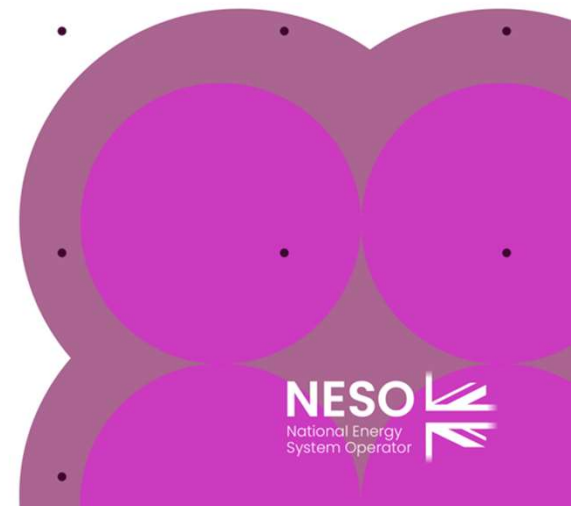
- PQ/ST Application Improvements

Next Steps

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Capacity Market Emissions Chapter Report

The new CM Emissions Chapter will be implemented in April 2025, introduced by DESNZ to enhance transparency and compliance with environmental standards.

Data Collection and Display:

- Emissions data for fossil fuel components in CMUs (1MW and above) must be recorded on a verified Exhibit ZA.

- Required fields include Weighted Emissions Intensity, Fossil Fuel Emissions, Yearly Emissions, Formula used, and Fuel types.

- Only CMUs with a CM Agreement will be included, starting with applications in 2024.

- Data will be divided into two registers: Active CANs and Expired/Terminated CANs.

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Capacity Market Emissions Chapter Report

Reporting Frequency:

- Quarterly reporting – New registers published on first working day of each quarter

- First iteration of the Emissions Chapter will be published on 1 April:
  - As the process requires the Capacity Agreement Notices (CANs) to be generated and issued the initial publication on 1 April will only capture data in relation to the 2025/26 T-1 Delivery Year.
  - An updated set of reports will be issued the following week once the 2028/29 T-4 CANs have been released

- Expired and Terminated CANs register will be blank (just headers) for at least the first quarter and until first CANs expire or are terminated

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Feature Demonstration

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Key areas to be covered in today's demonstration

Capacity Market Emissions Chapter Report

Grace Chapeshamano

Recording not available

1 — **Where you can find the Capacity Market Emissions Chapter Report**

2 — **How to download the Capacity Market Emissions Chapter Report**

3 — **What are the different Capacity Market Emissions Chapter Reports**

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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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Company Transfer

Additional Feature expected delivery June 2025

Feature Description

Integration of the Company Transfer process directly into the portal so that users can carry out the process of Transferring a company on one of the three transfer types;

1) Moving a company from one portfolio to another,
2) Moving a company from a portfolio to become independent and,
3) Moving an independent company into an existing portfolio.

The process is to allow the Capacity Market Portal to reflect the transfer of a company that is active within the Capacity Market following the request to enact the change by a Capacity Provider, provided that either currently owns or will be acquiring said company.

Customer Feedback Considered

- Current method of filling in the template form is time consuming and a bit clunky with some repeated information required across the tables required.
- Integrated process would reduce back and forth between the Customer and Delivery Body when building up and validating the information prior to a ticket being raised.

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Company Transfer

High Level Requirements Proposed

- Adoption of two-stage customer side submission with Transferor and Transferee side to make the portal process similar to a CMU transfer
- If a new Main Admin is required as part of the transfer, the portal will indicate accordingly the steps that are required to setup a new user to become the Main Admin (possibly an option if doing a Portfolio to Independent Transfer)
- Integration directly into the portal for auditing and record keeping purposes
- Process can only be actioned by Main Admins
- Process will still require Director's declaration akin to current process, will be as standalone upload as part of process similar to other processes like FCM.
- Once request is completed, the transferred company will have a single Main Admin user, and additional users can be added in the usual existing process.
- Update to guidance currently on portal which walks through the process how it exists now in the workaround form.
- Portal to detect company type when initiating the transfer (limited / non limited)

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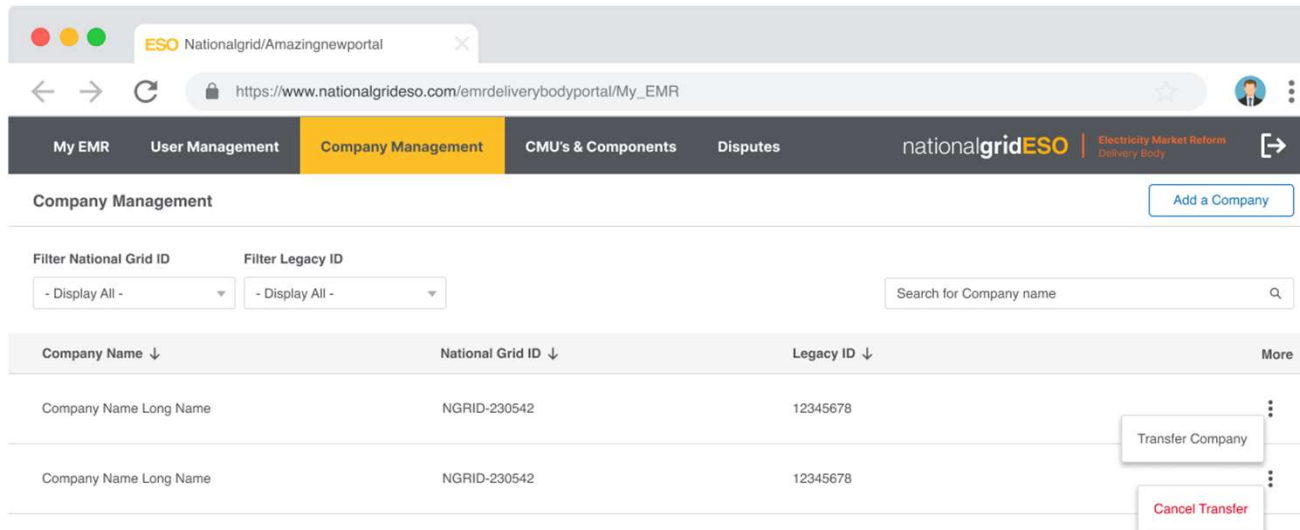
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Company Transfer

Current process

The current information form has separate tables to account for each transfer types and for limited and non-limited companies.

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Company Transfer

Mock-up Process Images (draft WIP, will change before feature release)

Initiate company transfer within the Company Management tab along the top row of User Portal via the three dots.
Possible alternative location would be in 'Management Activities' tile on front page.

Company Transfer

Mock-up Process Images (draft WIP, will change before feature release)

Transferor page prompting user to provide information including the Main Admin details and the Transferor Portfolio details if doing an applicable transfer.
For a Portfolio to Independent transfer the prompt would be to confirm the Company leaving the current portfolio.

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Company Transfer

Mock-up Process Images (draft WIP, will change before feature release)
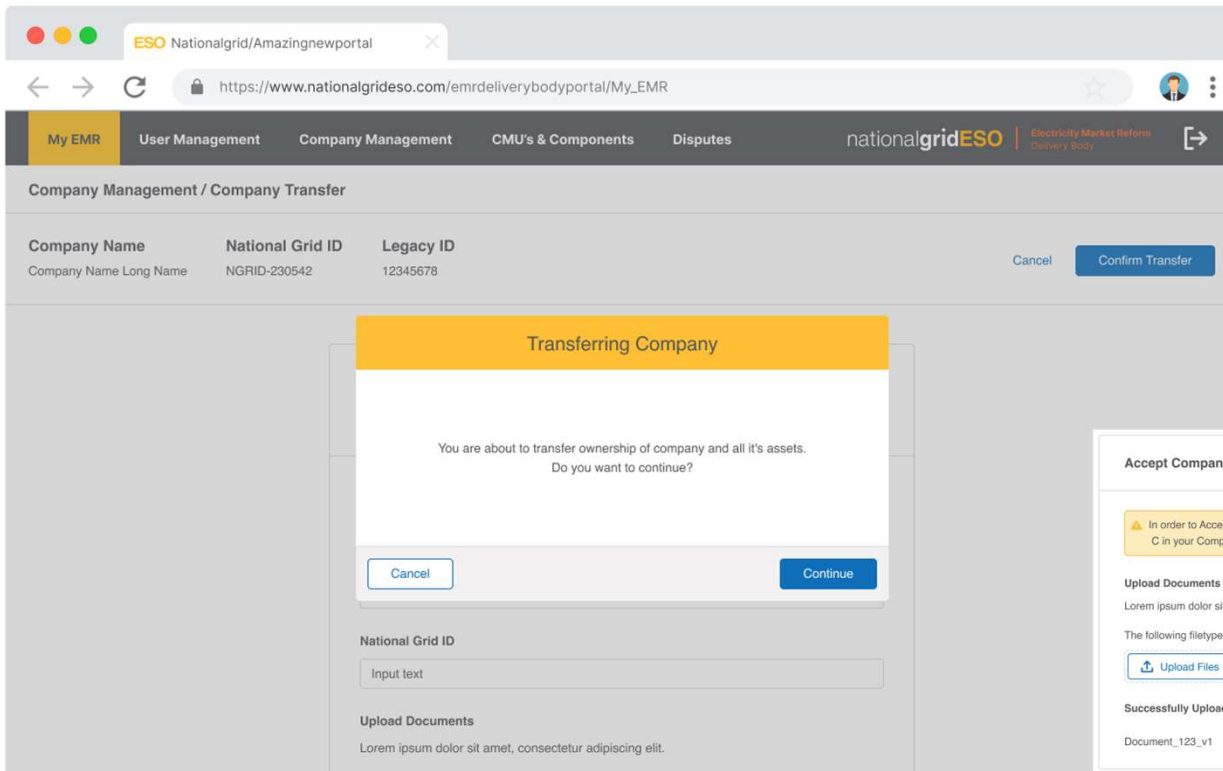
After submitting the required information and attaching the Director's Certificate (and other files if desired e.g. Cover Letter), the Transferor can confirm they wish to transfer the company.

Company Transfer

Mock-up Process Images (draft WIP, will change before feature release)
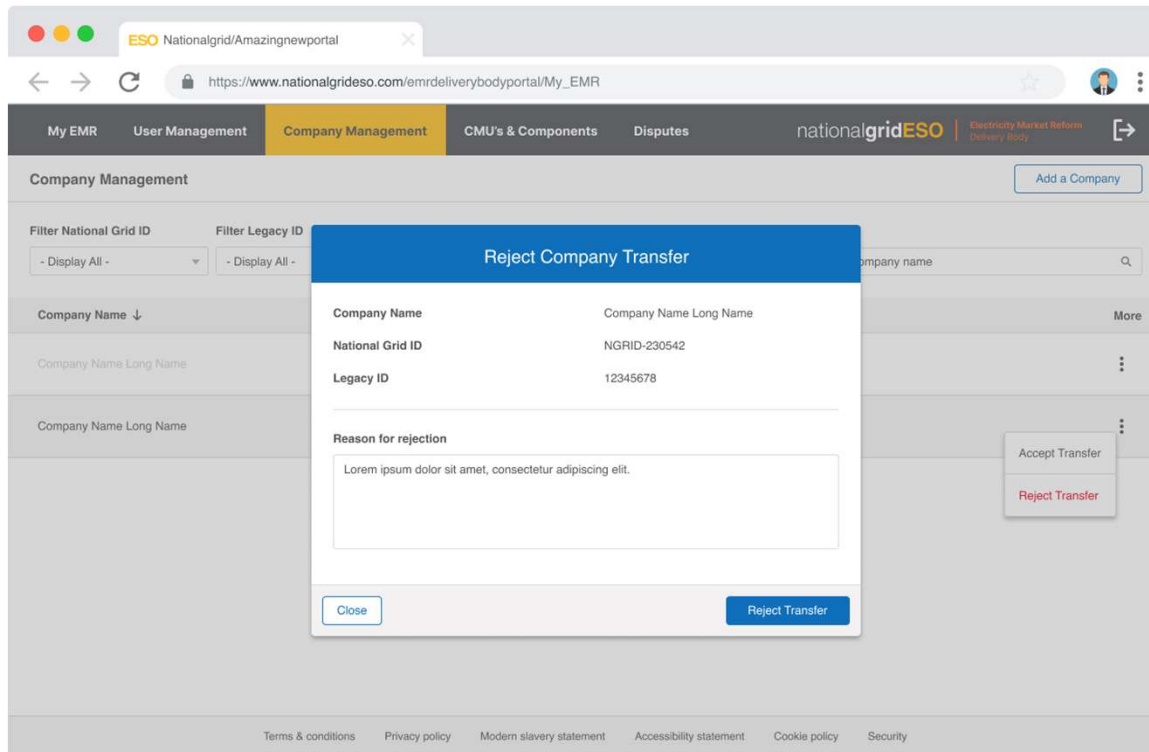
The Transferee Main Admin user will then be able to action the request, either Accepting or Rejecting the transfer (with the option to add a rejection reason in a text box).

If accepted, this would then be sent to the Delivery Body to review and approve / reject within the allotted SLA period.

Print & Export PQ/ST Application

Additional Feature expected delivery June 2025

Feature Description

The Print functionality is to allow an EP User to generate a user-readable version of their Application as a document, which can then be printed if required, whereas the Export functionality is purely a data extract in CSV format.

Customer Feedback Considered

- *'No way to report from portal - extract data on applications, agreements, results, etc'*
- *'Lack of functionality to export a copy of applications is a significant challenge.'*
- *'Ability to export a copy of the application as submitted for our records'*

High Level Requirements Proposed

- For both features ONLY the fields visible in the EMR Portal will be included in the printed file & CSV.
- If a question has not been answered, then it should show as blank in the printed file & CSV.
- The CSV should be split into tabs, as it is exported from an Application, there should only be one Application record, one CMU and multiple Components (if applicable).
- Both functionalities will be on the My Application page, and ideally Applicants would be able to select multiple Applications and choose to Print and/or Export all at once. The option to select individual Applications to Print and/or Export would still be available.

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CMU Type Change

Additional Feature expected delivery June 2025

Feature Description

This functionality allows Users to clone an existing CMU's information (including documents, Components etc.) into a new CMU with a new CMU ID. Additionally with the improvements that are planned to be made to the Cloning functionality, this feature will also allow CMU Type to be changed during Cloning (i.e. Unproven DSR to Proven DSR OR New Build Generating to Existing Generating) notify Applicants of the change and give the opportunity to Opt-out of the Auction.

Customer Feedback Considered

- *'not being able to clone a CMU from New Build to Existing, or from Unproven to Proven. Having to make a whole new CMU which means these are now not linked in the portal which does not follow our usual way of organising CMUs.'*

High Level Requirements Proposed

- When a User is cloning an Unproven DSR CMU they can change the CMU type to become a Proven DSR CMU, the same would be possible for New Build Generating CMU to Existing Generating CMU.
- When the CMU type is changed, then fields on the new CMU type which were also on the original CMU type should be pulled through but can be edited/overwritten.
- When a User is cloning and changing a CMU type they can only clone documents which are relevant to the new CMU type

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CMU & Component Improvements

Additional Feature expected
delivery June 2025

Feature Description

Enhancements to the CMU & Component features.

Customer Feedback Considered

- 'CMU derated capacity or connected capacity is not displayed on the CMU screen, which means you have to go into each component in a CMU to find out the capacity. This is problematic with multi-component CMUs.'
- 'Navigation can be time consuming due to defaulting to the home screen when returning to a page or requiring to click through multiple screens (eg cannot access CMU components when viewing the CMU)'
- 'Ability to click "back" to previous screen and/or retain the filters applied on the previous screen.'

High Level Requirements Proposed

- Removal of historic fields to ensure Users only see questions applicable to their CMU Type e.g. Line Loss Considerations upload, DSRs seeing Auxiliary Load questions, Capital Expenditure and Method of Calculation from Unproven DSR
- CMU to show the sum of Total Component Capacity
- Better Navigation between CMU, Component and Application
- Improvements of filters to ensure the order matches the columns and that they persist when returning to the relevant screen, this will be implemented across all screens with filters.

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PQ/ST Application Improvements

Additional Feature expected delivery June 2025

Feature Description

Enhancements to the PQ/ST Application feature and other pre-Application processes.

Customer Feedback Considered

- 'It's not always obvious that there are attachments due the layout of some pages.'
- 'There is no ability to open certain pages or sections within another Tab/Window, users have to duplicate tab and then navigate when comparing applications or CMUs etc.'

High Level Requirements Proposed

- Guided Journey for the Applicant Status field only showing uploads required based on the selection
- Rewording and re-ordering of the construction dates to better align with the construction process
- Improving the layout of the Company Information screen to show uploaded documents more clearly

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What's coming next?

March 2025

- **27 March 2025**
- Emissions Register Demonstration
- Additional Feature Requirement playback
- Update on Delivery Body responses to Knowledge Site customer feedback (website post)

18 March
CIAM, Emissions Register & Application Validation Deployment

April 2025

- Confirmation of expected Q1 FY2026 Delivery Scope (via customer comms)

1 April
Emissions Register Chapter publication

May 2025

- **8 May (TBC)**
- Additional Feature Demonstrations
- Requirement playback for Q1 FY2026 Features

May
System Release & Customer Portal Survey

June 2025

- **Date TBC**
- 1st year of the new CM Portal – 17 June
- Feature Demonstration for Q1 FY2026 Features

June
System Release

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Thank you for your time

Please reach out to the team
box.newemr.itteam@nationalenergyso.com

should you need further support or

would like to find out more about the

User Group.

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Q4 Portal Delivery reminder

Customer Identity and Access Management (CIAM)

- BP2 Milestone – *'Deliver planned integration of EMR within the Digital Engagement Platform'*
- Ensures secure access to NESO Portal by authorised individuals
- Simplifies user experience by allowing a customer to use a single set of login details for various services

PQ Application Validation

- Provides the opportunity for customers to review their PQ Application for any incomplete and incorrect fields.
- Condition based validations built considering the interdependent fields.

Emissions Register

- The Emission Register will generate component data where the fuel type is declared as fossil fuel.
- The register will publish data from valid CANs that include all components with declared fossil fuels.
- The Emission Register will be published quarterly for all auctions post PQ-2024.

DSR Component

- This technical enhancement will enable customers and Delivery Body users to manage up to 50,000 DSR components.

Process Adoption

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

KEY

- Customer facing enhancement
- Rule & Regulation enhancement
- Technical/Internal enhancement
- Known Customer Feedback

Additional Portal Delivery

Print & Export PQ/ST Application
- The ability to print and export an application to support offline validation and retention.

PQ/ST Application Improvements
- Delivery Body and customer raised enhancements impacting the Application submission process.
- DB improvements include ensuring correct questions are visible, clearly worded and function as intended.
- Customer improvements include navigation, filter retention and order of information presented.

PQ/ST Assessment Improvements
- Enhancements for assessing applications e.g. Visibility of applications at company level, amending result letter to make requirements clearer when CPQ.

CMU & Component Improvements
- Delivery Body raised enhancements e.g. removing fields not relevant to the CMU/Component and customer lead enhancements e.g. Total CMU Capacity and better navigation

CMU Type Change
- Changing CMU type whilst cloning. Unproven DSR to Proven DSR. New Build Generating to Existing Generating.

PAR Updates
- Improve processes in Post Application Requests (PAR), including SCM, TPS, and EYC & Planning Consent, etc to enhance data accuracy.

Company Transfer
- Process automation of transferring a company following the request to do so from a Capacity Provider.

CAN & AACO Improvements
- Aims to enhance user experience on the customer portal by addressing visibility issues on the CAN versions and adding filters to improve accessibility for customers

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