

# **User Guide**

## **Single Market Platform Portal**

February 2022

# Contents

## Contents

<b>1. Introduction.....</b>	<b>3</b>
1.1. Document Purpose.....	3
1.2. Background to SMP.....	3
1.3. Supported Browsers .....	3
1.4. Requirement for Use .....	3
1.5. Disclaimer and Applicant's Responsibility .....	4
1.6. Help and Support.....	4
<b>2. Initial Registration &amp; Onboarding .....</b>	<b>5</b>
2.1. First-time User Registration.....	5
2.2. Registering the Primary User .....	6
2.3. Registering the Primary User – Part 2.....	7
2.4. Registering the Primary User – Part 3.....	8
2.5. Registering the Primary User's Company .....	8
2.6. Registering a UK Company – Part 2 .....	11
2.7. Registering a UK Company – Part 3 .....	12
2.8. Registering a Non-UK Company .....	13
2.9. Registering a Non-UK Company – Part 3 .....	14
2.10. Registering a Non- UK Company – Part 4 .....	15
2.11. Confirmation of Registration .....	16
<b>3. User Verification &amp; Authentication .....</b>	<b>17</b>
3.1. First Time User – Welcome Email .....	17
3.2. First Time User – Email Address Verification .....	18
3.3. Ongoing Access to the Portal: Logging in using Multifactor Authentication .....	19
3.4. Ongoing Access to the Portal: Logging in Issues.....	20
3.4.1. Forgot your password? .....	20
3.4.2. Forgot your username? .....	20
<b>4. Updating User &amp; Company Details .....</b>	<b>21</b>
4.1. Making updates to your own Contact & Company Details .....	21
4.2. Update Company Details: Home Page .....	22
4.3. Update Company Details: Completing Your Detail Section .....	23
4.4. Update Company Details: Completing Your Company Details Section .....	24
4.5. Update Company Details: Completing Your Company Address Section.....	25
4.6. Update Company Details: Completing Your Company Address for Receipt of Notice .....	26
4.7. Terms & Conditions: Confirmation .....	27
4.8. Confirmation Notification Screen .....	28
<b>5. Asset &amp; Unit Management Home Page .....</b>	<b>29</b>

5.1.	Navigating the Landing Page for Unit & Asset Management .....	29
<b>6.</b>	<b>Creating &amp; Managing Assets .....</b>	<b>30</b>
6.1.	Create an asset .....	30
6.2.	Asset Registration: Submitting Asset Information .....	31
6.3.	Asset Registration: Asset Details Section .....	32
6.4.	Asset Registration: Asset Connections Section .....	33
6.5.	Asset Registration: Asset Site Location .....	34
6.6.	Asset Registration: Asset MPAN Details .....	35
6.7.	Asset Registration: Save Asset Detail Submission .....	36
6.8.	Asset Registered: Asset Tile .....	37
<b>7.</b>	<b>Creating &amp; Managing Units.....</b>	<b>38</b>
7.1.	Create a Unit .....	38
7.2.	Unit Registration: Overview Page .....	39
7.3.	Submitting Unit Information: Unit Details Section .....	40
7.4.	Submitting Unit Information: Unit Connection Section .....	41
7.5.	Submitting Unit Information: Unit Site Location Section.....	42
7.6.	Submitting Unit Information: Confirmation of Submission.....	43
7.7.	Modifications to Registration of Units .....	44
<b>8.</b>	<b>Asset to Unit Alignment .....</b>	<b>46</b>
8.1.	Grouping Assets by Unit (Asset Alignment) .....	46
8.2.	Selecting Unit for Grouping .....	47
8.3.	Match & Un-matching selected assets to Unit for Grouping .....	47
8.4.	Asset Alignment for multiple units .....	49
<b>9.</b>	<b>Prequalification for Services .....</b>	<b>50</b>
9.1.	Identifying Units to participate in Pre-qualification .....	50
9.2.	Pre-qualification Home Page.....	51
9.3.	Identifying Services to apply for pre-qualification for selected Unit.....	52
9.4.	De-selecting Services to apply for pre-qualification for selected Unit. ....	52
9.5.	Completing Pre-qualification Criteria Sections by Service: Unit Calibration Section .....	54
9.6.	Completing Pre-qualification Criteria Sections by Service: Evidence Section .....	55
9.7.	Example of Template for Download .....	56
9.8.	Uploading Completed Templates .....	56
9.9.	Confirmation of Upload Completed .....	57
9.10.	Completing Pre-qualification Criteria Sections by Service: Asset Testing Section .....	58
9.11.	Completion of Pre-qualification Criteria: Terms & Conditions Section .....	59
9.12.	Confirmation of Submission of Pre-qualification Application Request. ....	60
<b>10.</b>	<b>Glossary of Terms .....</b>	<b>61</b>

# 1. Introduction

## 1.1. Document Purpose

The purpose of this document is to help readers access, navigate and use the Single Market Platform (SMP) Portal to enable Balancing Service Providers and Agents market entry to engage in Balancing Services. This includes the administrative functions, initial registration and onboarding, submission & management of Assets and their respective Units and Pre-qualification Application Process. Moreover, the document illustrates the detailed steps entailed in key functionality of the Portal.

## 1.2. Background to SMP

Customer and stakeholder feedback highlighted substantial opportunities to transform our interactions at all stages in market participation with the Electricity System Operator (ESO). As we transition and transform our markets to closer to the day procurement, Single Market Platform (SMP) will be the go-to place for market entry and participation; it will facilitate participation in new smart and sustainable markets, aiming to lower barriers to entry, attracting higher volumes, ensuring new technologies are onboarded faster, markets are cleared, and payment is made swiftly and accurately. As we transition and transform our markets to closer to the day procurement, SMP will be the go-to place for market entry and participation; it will facilitate participation in new smart and sustainable markets, aiming to lower barriers to entry, attracting higher volumes, ensuring new technologies are onboarded faster, markets are cleared, and payment is made swiftly and accurately.

As stated in our RIIO-2 business plan, SMP will provide a single point of entry for market participants to access data related to: how they can become a provider, how they can sell their services in a co-optimised way, how they can manage the lifecycle of their contractual relationship with ESO, review how they are performing (both operationally and financially).

## 1.3. Supported Browsers

For the best experience, we recommend that the latest version of **Chrome** is used to access the portal. You can also use the latest versions of **Firefox** or **Safari**.

We do not recommend any version of Internet Explorer as this site has not been designed to use this browser and therefore you may encounter errors.

## 1.4. Requirement for Use

Access to the internet and a phone to receive two factor authentication codes.

## 1.5. Disclaimer and Applicant's Responsibility

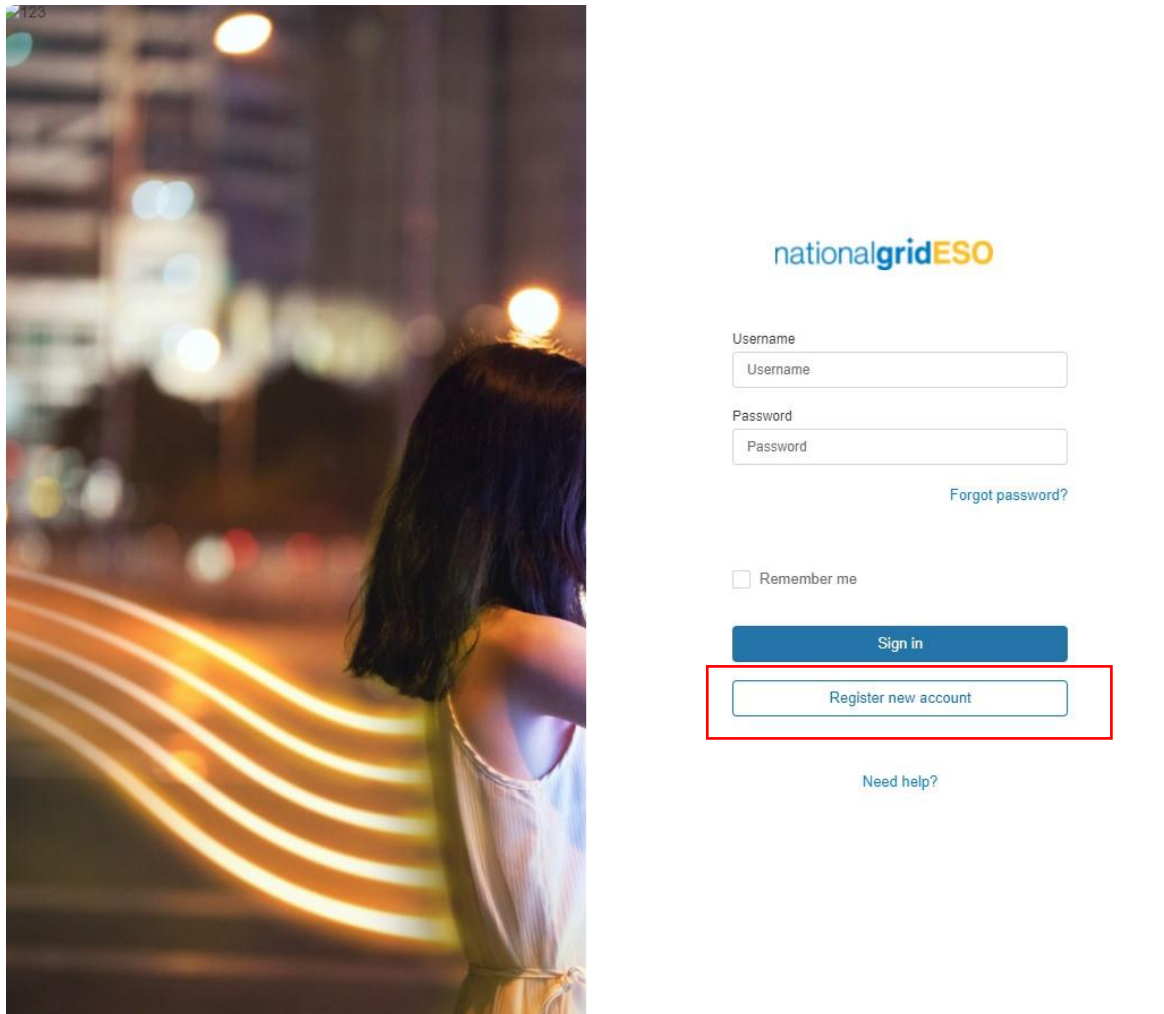
The information supplied with, contained in, or referred to in this Document, and all other information is given in good faith. However, no warranty or representation or other obligation or commitment of any kind is given by National Grid, its employees or advisors as to the accuracy or completeness of any such information or that there are not matters material to the arrangements and matters referred to therein other than is contained or referred to in such information. Neither National Grid nor its employees or advisors shall be under any liability for any error or misstatement or as a result of any failure to comment on any information provided by National Grid or the recipient of the Documentation or any other person or any answers to any questions or for any omission and none of such information shall constitute a contract or part of a contract.

## 1.6. Help and Support

For any queries on registering and completing an application, these should be sent to [commercial.operation@nationalgrid.com](mailto:commercial.operation@nationalgrid.com) or you can contact the team on 01926 65 4611. For any technical issues, you can contact the helpdesk on +44 800 917 7111.



## 2. Initial Registration & Onboarding



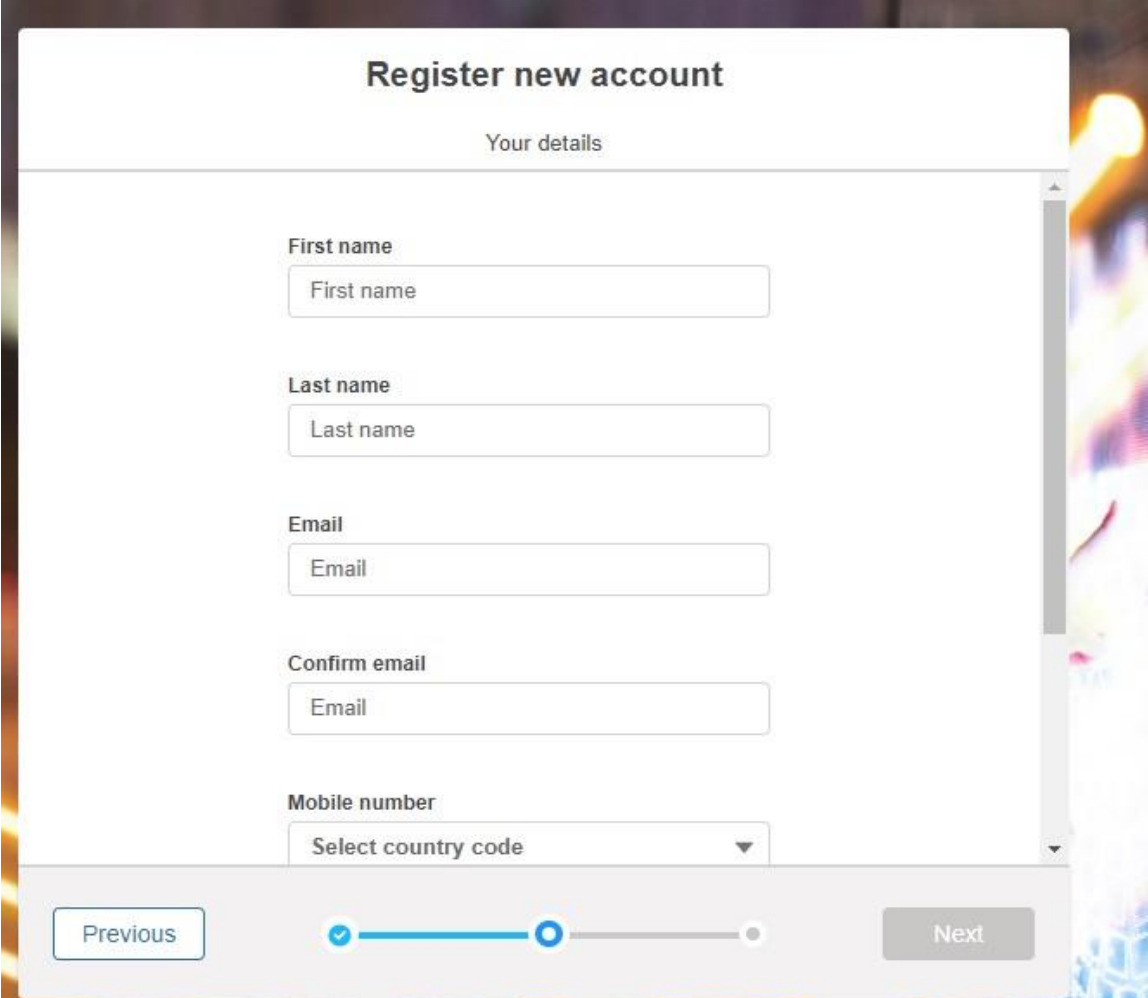
### 2.1. First-time User Registration

- The User should visit and bookmark the following URL for Release 1.0 during User Acceptance Training & Testing (UAT): <https://smpuat-nationalgrideso.cs80.force.com/singleMarketsPlatform/s/login/?ec=302&startURL=%2FsingleMarketsPlatform%2Fs%2F>
- As a first time User, you will need to click on the “**Register New Account**” Button
- The User will be navigated to the first ‘screen’ to capture registration details.

## 2.2. Registering the Primary User

- In order to access the SMP Portal, it is expected that upon initial registration the main or 'primary' contact (user) at your organisation/company will undertake the registration steps.
- Registration involves submitting one's contact details and their organisation/company details. The successive order is contact details followed by company details.
- Figure 1.0 below illustrates the fields required for the Contact/User's details.

Figure 1.0 : Capturing User/Contact Details



The screenshot displays a web form titled "Register new account" with a sub-section "Your details". The form contains the following fields:

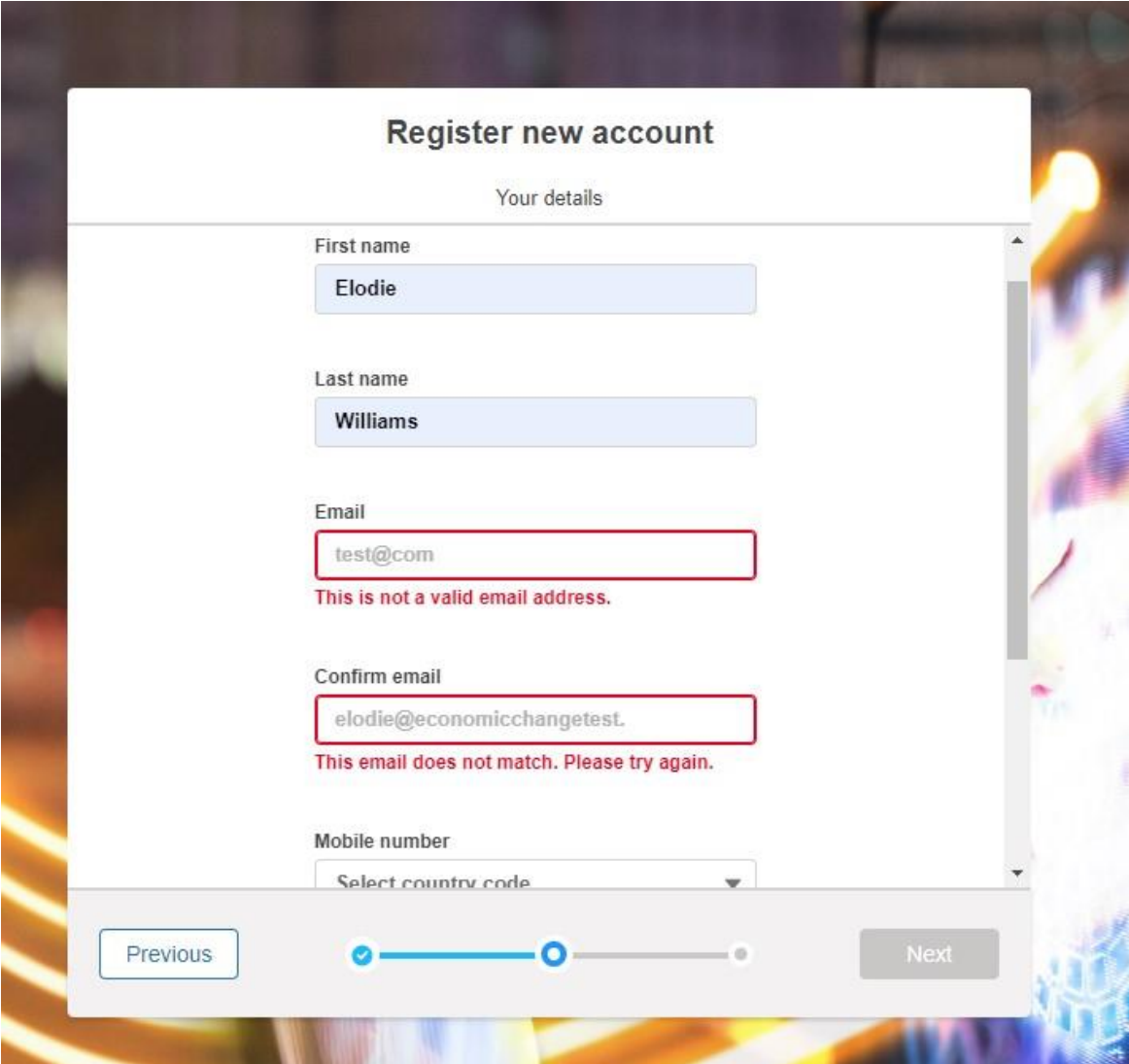
- First name**: A text input field with the placeholder "First name".
- Last name**: A text input field with the placeholder "Last name".
- Email**: A text input field with the placeholder "Email".
- Confirm email**: A text input field with the placeholder "Email".
- Mobile number**: A dropdown menu with the placeholder "Select country code".

At the bottom of the form, there is a "Previous" button, a progress indicator showing the first of three steps is complete, and a "Next" button.

## 2.3. Registering the Primary User – Part 2

- Figure 2.0 below illustrates the additional fields required for the Contact/User's details.
- Field Names with a red Asterix symbol are mandatory fields. Please note that a User will not be able to complete the registration process without submitting a field value – if the field is left empty, the User will be prompted with a red outline of the field in question and a prompt notice as illustrated in Figure 2.0 below.

**Figure 2.0: Capturing User/Contact Details**



The screenshot displays a 'Register new account' form with the following fields and validation status:

- First name:** Elodie (Valid)
- Last name:** Williams (Valid)
- Email:** test@com (Invalid - This is not a valid email address.)
- Confirm email:** elodie@economicchangetest. (Invalid - This email does not match. Please try again.)
- Mobile number:** Select country code (Dropdown menu)

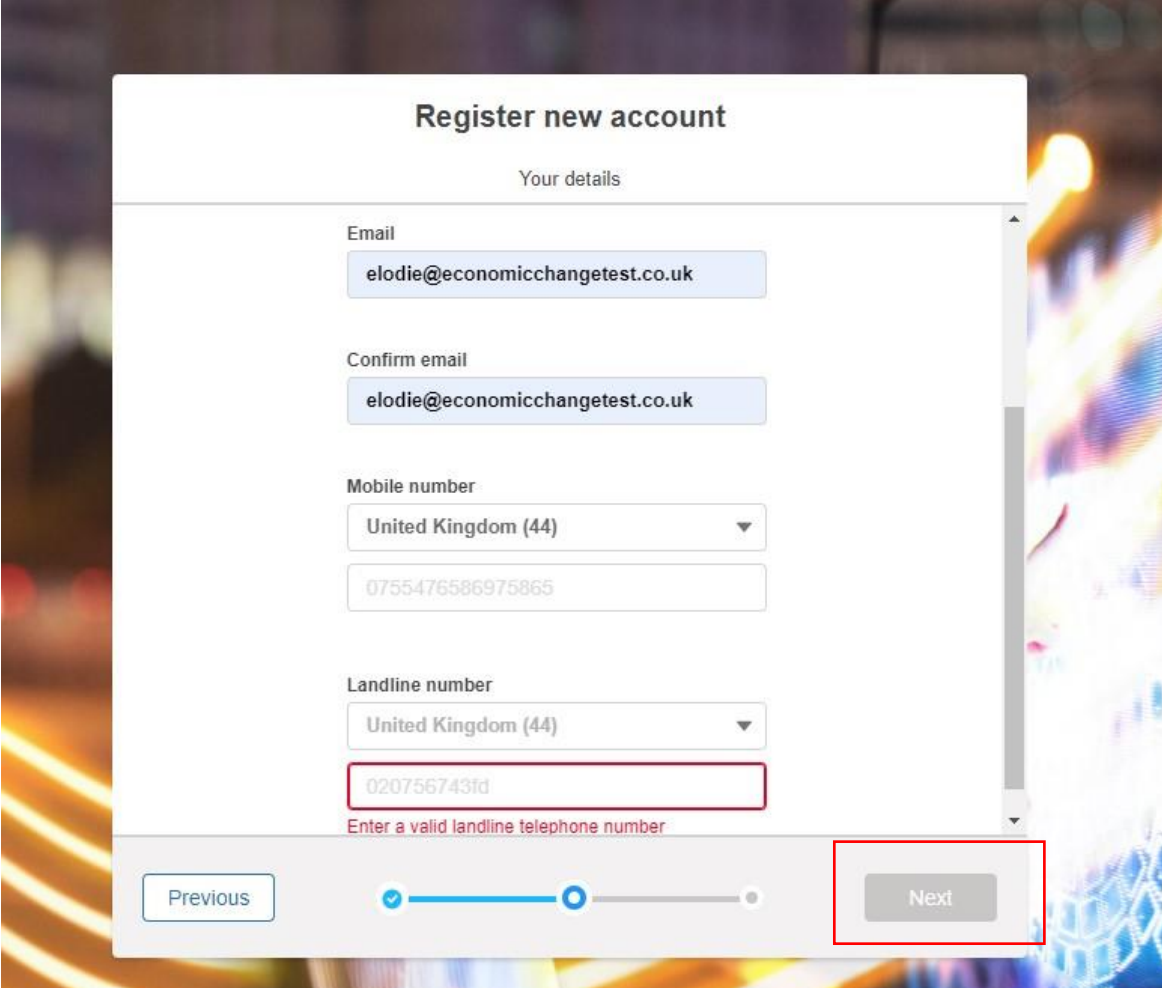
At the bottom, there is a progress bar with three steps. The first step is completed (indicated by a blue circle with a checkmark). The second step is currently active (indicated by a blue circle). The third step is not yet started (indicated by a grey circle). Navigation buttons 'Previous' and 'Next' are located at the bottom left and right respectively.



## 2.4. Registering the Primary User – Part 3

- Figure 3.0 below illustrates the additional fields required for the Contact/User's details.
- When entering email addresses or telephone numbers, standardised formats are expected, if a User/Contact does not submit field values compatible with the expected format then the field will be flagged in a red border with a prompt instruction. For example if an email address has been submitted with the incorrect format i.e *john.smith\_.testcom* rather than [john.smith@test.com](mailto:john.smith@test.com)
- Once all of the fields have been completed on the User/Contact section, the “Next” button will no longer be shaded grey, instead it convert into a blue ‘button’, allowing you to proceed to the next step.

Figure 3.0: Capturing User/Contact Details



The screenshot displays a 'Register new account' form with the following fields and elements:

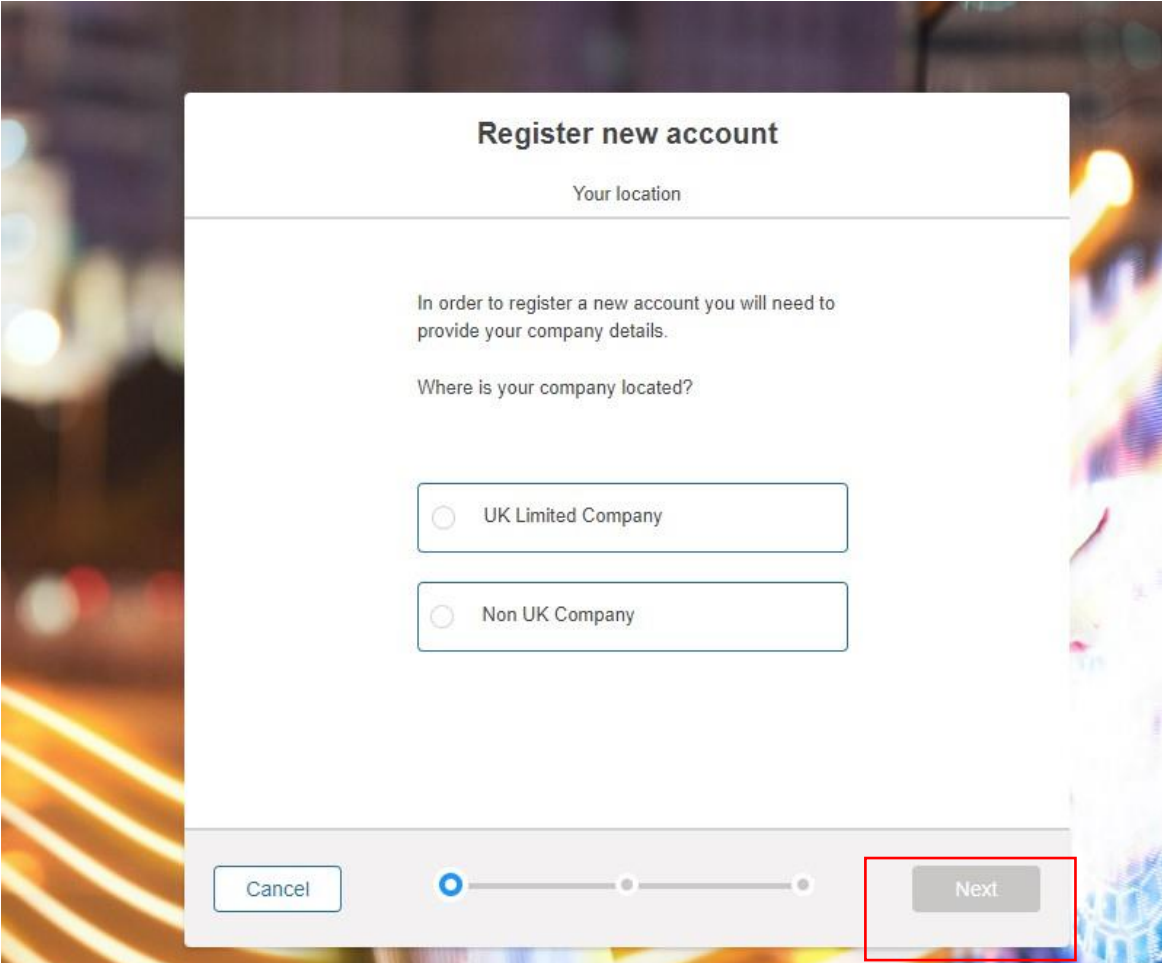
- Email:** elodie@economicchangetest.co.uk
- Confirm email:** elodie@economicchangetest.co.uk
- Mobile number:** United Kingdom (44) (dropdown), 0755476586975865 (text input)
- Landline number:** United Kingdom (44) (dropdown), 020756743fd (text input, highlighted with a red border and error message: 'Enter a valid landline telephone number')
- Navigation:** Previous button, a progress indicator with three dots (the second dot is active), and a Next button (highlighted with a red border).

## 2.5. Registering the Primary User's Company

- Figure 4.0 below illustrates the initial screen for capturing the Company/Organisation details.

- The 'Register new Account' stage involves two pathways depending on the Company Status. If the User/Contact's organisation is a **UK Limited Company**, they select the first checkbox. If the User/Contact's organisation is a **Non-UK Company** then they select the second checkbox.
- Once the option is selected, the user clicks on the "Next" Button.

**Figure 4.0: Capturing Company/Organisation Details – Company Status**

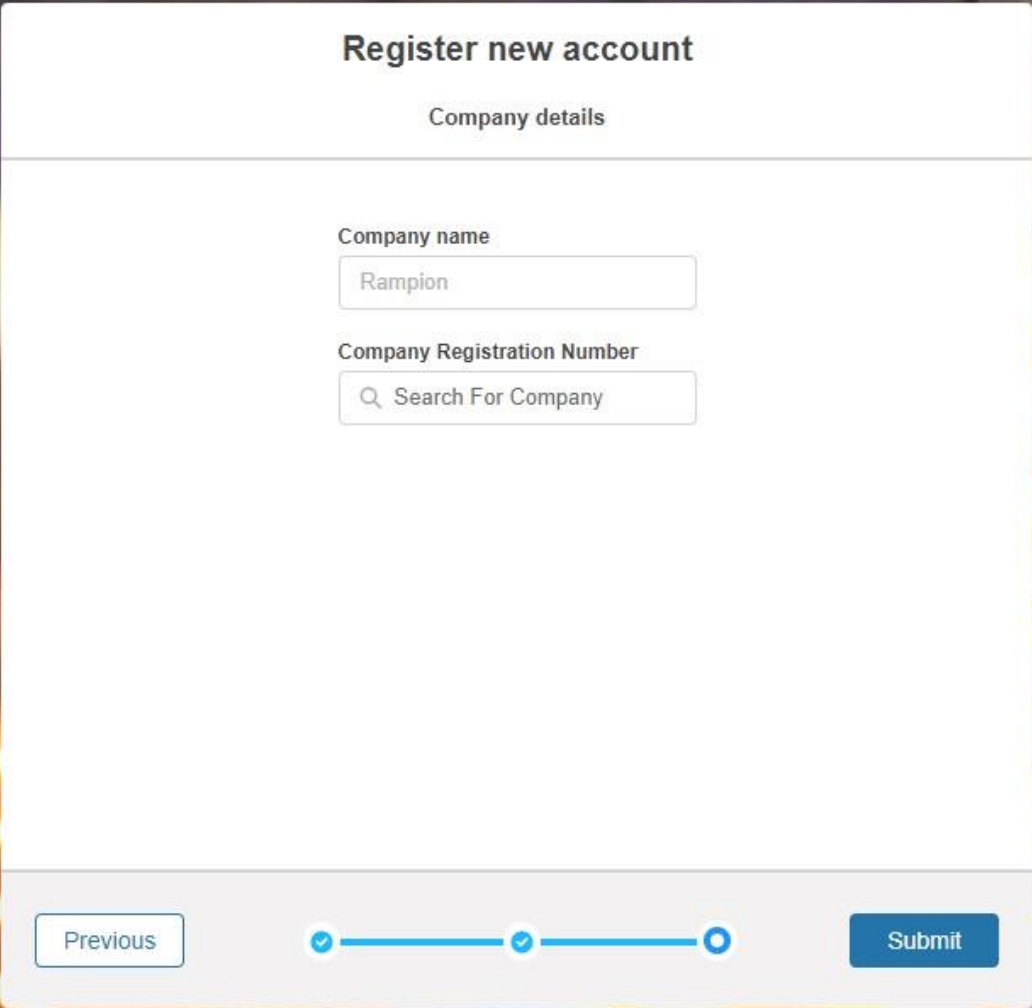


The screenshot displays a web form titled "Register new account". Below the title is a sub-header "Your location". The main content area contains the text: "In order to register a new account you will need to provide your company details." followed by the question "Where is your company located?". There are two radio button options: "UK Limited Company" and "Non UK Company". At the bottom of the form, there is a "Cancel" button on the left, a progress indicator in the center (a horizontal line with three dots, the first of which is filled with blue), and a "Next" button on the right. The "Next" button is highlighted with a red rectangular box.

## 2.4 Registering a UK Company

- Figure 5.0 below illustrates the screen for determining the Company/Organisation.
- The User/Contact will be prompted to search for the Company Name and the Company Registration Number.
- For Company Name - they will be expected to enter the name, which will trigger a lookup search/listing of similar names for the user to choose from.
- For Company Registration Number - they will be expected to enter the exact reference number, which will trigger a lookup search/listing for the user to select and confirm.
- Please note that only valid and accurate Registration Numbers will be accepted and appear in the search exercise.

**Figure 5.0: Searching for the Company**



**Register new account**

Company details

Company name

Rampion

Company Registration Number

Search For Company

Previous

Submit

## 2.6. Registering a UK Company – Part 2

- For Company Registration Number - they will be expected to enter the exact reference number, which will trigger a lookup search/listing for the user to select and confirm.
- Please note that only valid and accurate Registration Numbers will be accepted and appear in the search exercise. If your Company is a UK Limited Company and the search listing is unsuccessful, you will need to reach out to your NGESO Account Manager by email
- Once a match has been found, the User/Contact must select the “Submit” button to proceed to the next step.

Figure 5.0: Searching for the Company

**Register new account**

Company details

Company name  
Rampion

Company Registration Number  
Q 213

10342596 213 LIMITED  
09473402 213 LIMITED  
06055202 213 LTD  
02297949 ST LAWRENCE ...  
06677514 213 & 215 ST J...

Previous

Submit

## 2.7. Registering a UK Company – Part 3

- Figure 6.0 illustrates the screen to present the User/Contact with the Company Listed Registered Address Details based on the Company Name selected as a result of the lookup search
- If the search result is incorrect or the User/Contact wishes to undertake a new search, then they are expected to click on the **“Remove Company”** link to refresh the search functionality.
- Once the search result is correct, then the User/Contact selects the “Submit” button on the bottom right hand corner of the screen.

**Figure 6.0: Resetting the Company Name Search**

The screenshot displays a web form titled "Register new account" with a sub-header "Company details". It contains two input fields: "Company name" with the value "SHOREHAM LTD" and "Company Registration Number" with the value "13287556". Below these fields is a grey box containing the company details: "SHOREHAM LTD", "Heatherbank Bleach Mill Lane", "Menston", "Ilkley", and "LS29 6HE". A red box highlights the "Remove Company" link at the bottom of this grey box. At the bottom of the form, there is a "Previous" button, a progress indicator with three circles (the first two are checked), and a "Submit" button, which is also highlighted with a red box.

## 2.8. Registering a Non-UK Company

- Figure 7.0 below illustrates the screen for determining the Non-UK Company/Organisation.
- The User/Contact will be expected to check the Non-UK Company checkbox and clicks on the "Next" Button

**Figure 7.0: Selecting a Non-UK Company Status**

**Register new account**

Your location

---

In order to register a new account you will need to provide your company details.

Where is your company located?

☐ UK Limited Company

☒ Non UK Company

Cancel ● — ● — ● **Next**



## 2.9. Registering a Non-UK Company – Part 3

- Figure 8.0 below illustrates the screen for capturing the Non-UK Company/Organisation details.
- The User/Contact will be expected to enter field values including the accurate Company Registration Number. Please note that the *Company Registration Number* field is a standard 'text' box field which means it will accept standard alphanumeric text.
- The *Business Type* and the *Country* fields are drop-down fields which enable the user to choose from a series of options/field values when the arrow is clicked on.
- Please ensure that when submitting details they are accurate in order to pass verification by NGESO Account Managers.

**Figure 8.0: Submitting Non-UK Company Details**

The screenshot shows a web form titled "Register new account" with a sub-header "Company details". The form contains several input fields: "Company Registration Number", "Business Type" (a dropdown menu with a red box around the arrow), "Company name", "Address Line 1", "Address Line 2", and "County (Optional)". At the bottom, there is a "Previous" button, a progress indicator with three circles (the first two are checked), and a "Submit" button.

## 2.10. Registering a Non- UK Company – Part 4

- Figure 8.0 below illustrates the screen for capturing the Non-UK Company/Organisation details.
- A mandatory field for completion is the **Country of Incorporation**. A user/contact will be unable to progress to the next step without selecting a Country.
- Once the search result is correct, then the User/Contact selects the “Submit” button on the bottom right-hand corner of the screen.

Figure 8.0: Submitting Non-UK Company Details

**Register new account**

Company details

Address Line 2

County (Optional)

Postal Code

Country

Country of incorporation

Complete this field.

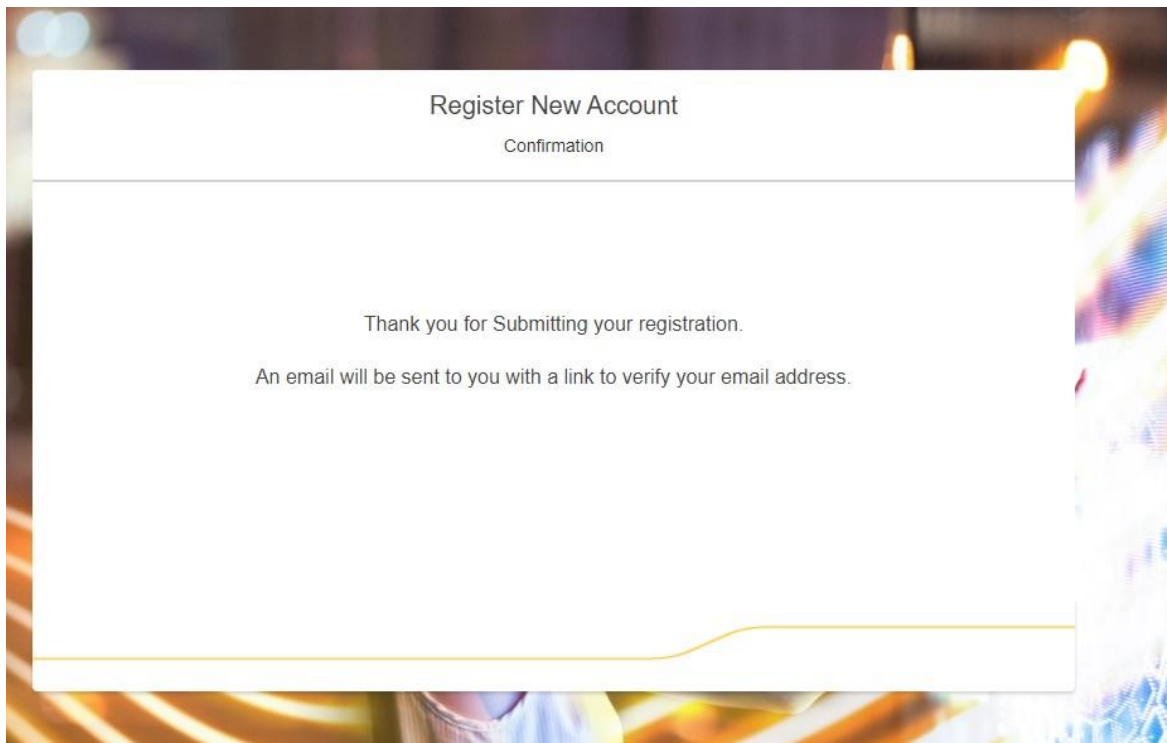
Previous

Submit

## 2.11. Confirmation of Registration

- Once the Company details are submitted and the 'Register New Account' section is completed, the User/Contact has reached the end point of the registration process and is presented with a notification screen illustrated in Figure 9.0.

**Figure 9.0: Confirmation of Registration**

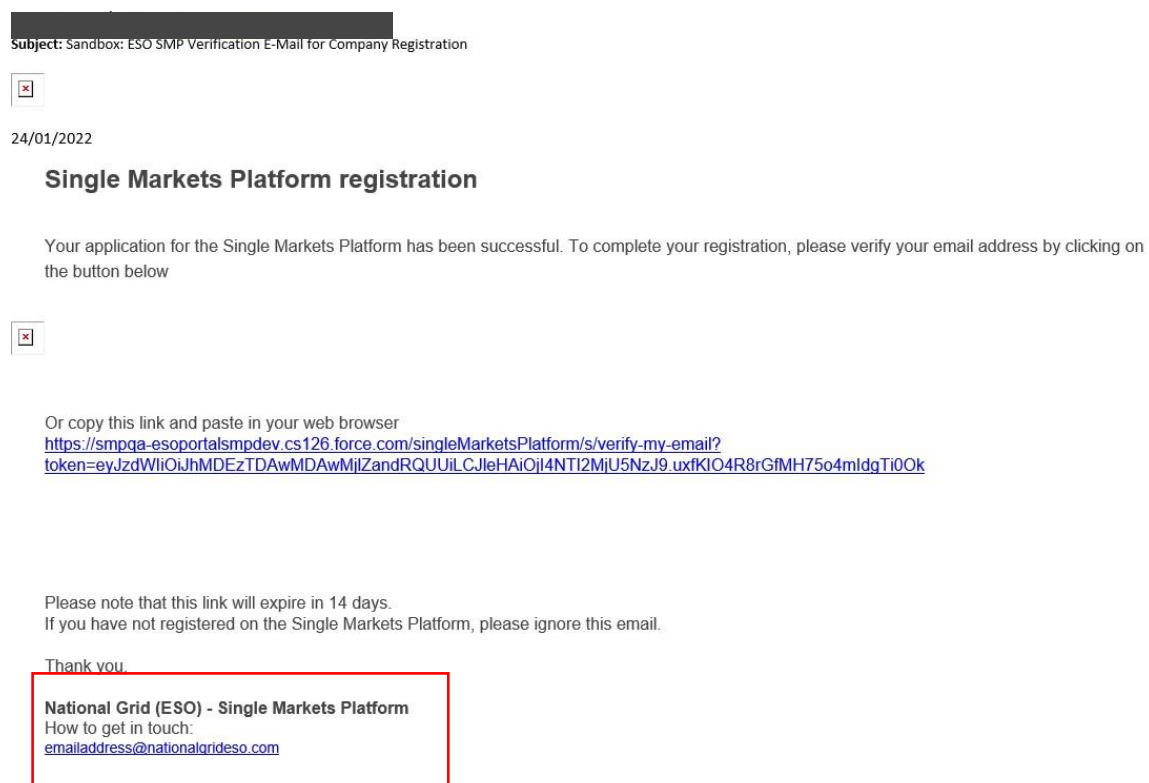


# 3. User Verification & Authentication

## 3.1. First Time User – Welcome Email

- An automated “Welcome” Email will land in the primary/first time user/contact’s Email Inbox shortly after the Registration process is complete as demonstrated in Figure 10.0.
- The user/contact should follow the instructions in the email template so as to verify the user’s email address.
- Please note that failure to verify the email address using the instructions below will mean the user will be blocked from accessing the portal. Therefore, please ensure that if the user has not received the email to a) search their spam/junk mail-box folders in the first instance and then b) reach out to their NGESO account manager using the email address below as a matter of priority.

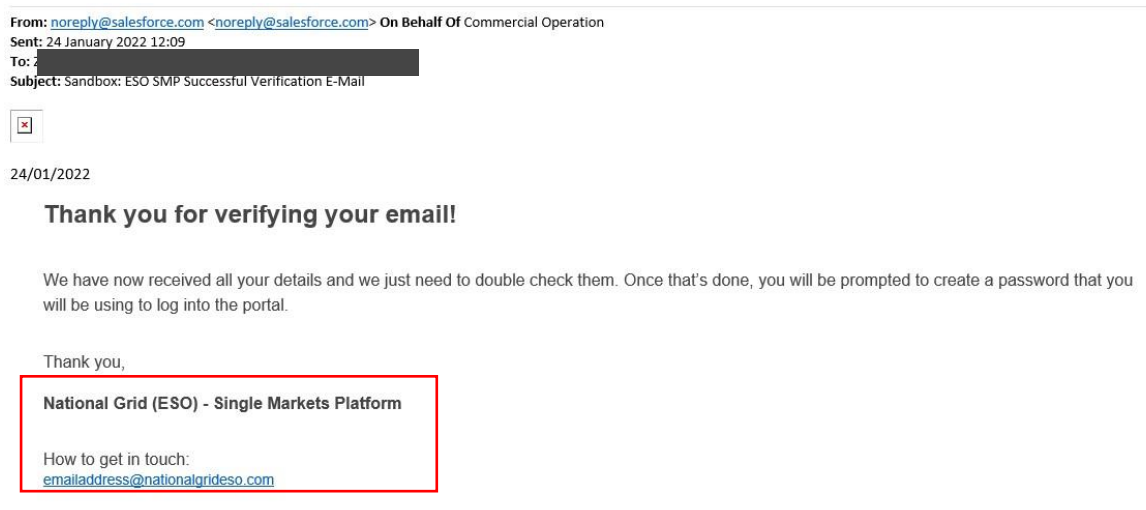
**Figure 10.0: Welcome Email Template**



### 3.2. First Time User – Email Address Verification

- Following on from the User/Contact verifying their email address, a subsequent automated email will be sent acknowledging that verification has been successful as demonstrated in Figure 11.0.
- If this email template is not received within 24 hours, then the User/Contact should reach out to the NGESO Account Managers using the email address below.
- An internal verification of the User & Company Account Registration Details will be undertaken by the NGESO Account Registrations Team and following this exercise the primary user/contact will be sent a final email template with instructions requesting they set a password.
- Once the user has set the password, they will be presented with the SMP Portal Login Page where they now have the Username & Password credentials to login in successfully moving forward.

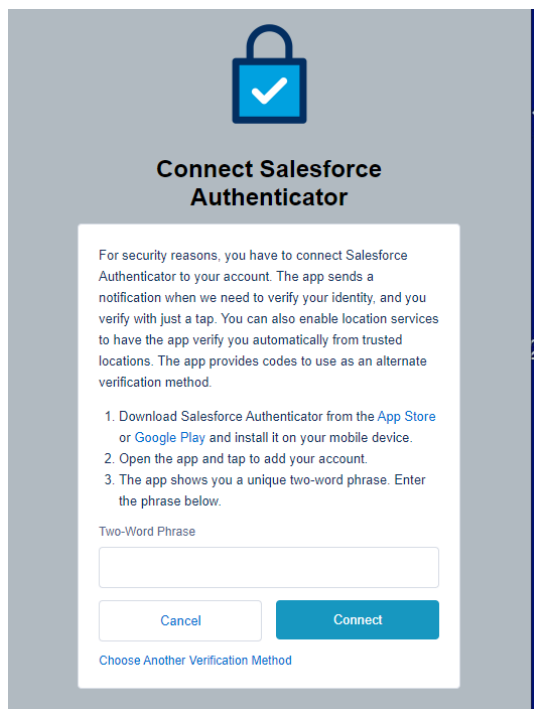
**Figure 11.0: Email Verification Confirmation Template**



### 3.3. Ongoing Access to the Portal: Logging in using Multifactor Authentication

- The final step prior to accessing the SMP Portal is to login with **Multifactor Authentication (MFA)**. This is a best practice and standard security and identify authentication measure that Salesforce CRM operates. Salesforce CRM underpins the SMP Portal.
- In order to deploy MFA, all users will be expected to use the official *Salesforce MFA Mobile App*. Users will have to download the App from their respective App or Google Play Store. It is advisable that users download and install the Mobile App in advance of the registration process to ensure a seamless experience. The MFA Mobile App will attempt to connect to the SMP Portal Account, upon this prompt please select 'Add Account', before being instructed to enter the Two Word Phrase generated by the App onto the notification screen illustrated in the figure below.
- When the User has entered their username and password, they will be re-directed towards the screen illustrated below and should follow the instructions by entering the two-word phrase into the corresponding field on their Mobile App screen and then selecting Connect.
- The MFA authentication process will take a couple of seconds, and then the user will be allowed entry into the SMP Portal.

Figure 12.0: Multifactor Authentication (MFA) Screen





## 3.4. Ongoing Access to the Portal: Logging in Issues

### 3.4.1. Forgot your password?

If you forget your password, you can click the “Forgot your password?” link. Follow the on-screen instructions to receive an email with a link to reset your password on the Portal Home Page.

### 3.4.2. Forgot your username?

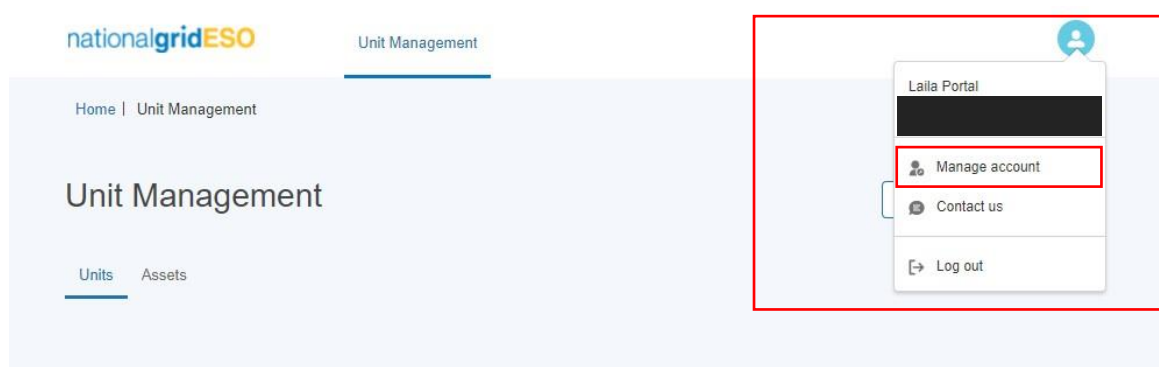
If you forget your username, please contact [commercial.operation@nationalgrideso.com](mailto:commercial.operation@nationalgrideso.com) for assistance.

## 4. Updating User & Company Details

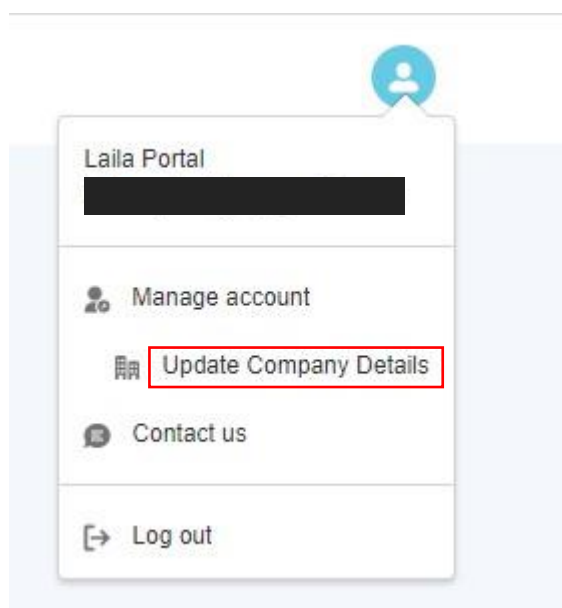
### 4.1. Making updates to your own Contact & Company Details

- In the event that a User/Contact's own details or those of his Company have changed or need updating or amending, a user is able to make such edits.
- The user must navigate to the right-hand section of the "Unit Management" Page. This is currently the default Landing/Home Page upon initially logging in.
- An 'avatar' icon will appear and the user must click on this, they will then be presented with a drop down pop up screen with options to either "Manage account" or "Contact us".
- The user should click on "Manage account".

**Figure 13.0: Managing Contact & Account Details Screen**



- The User will then select be prompted with an option to "Update Company Details" as illustrated in the figure below.



## 4.2. Update Company Details: Home Page

- The user is then navigated to the Update Company Details Page as illustrated in Figure 14.0
- The user can click on either the 'accordion' feature on the left-hand side to navigate to a particular sub section directly OR they can click on the sub section heading i.e 'Your Details'. This 'opens' up the section for granular level of information/fields to update or edit.

**Figure 14.0: Update Company Details Home Page Screen**

nationalgridESO Unit Management

Home | Company Details

### Update Company Details

Complete all the information below in order to register a new provider.

1 Your details

2 Company details

3 Company address

4 Address for receipt of notice

5 Term and Conditions

> Your Details

> Company Details

> Company address

> Address for receipt of notice

Terms & Conditions

By submitting this form, you make the following declarations:

### 4.3. Update Company Details: Completing Your Detail Section

- The user is able to update only the First Name or Last Name fields. Please note that the Company Email address is not available for editing. If the User requires a change to the email address, they should approach the NGESO Account Managers directly via email or phone.

**Figure 15.0: Update ‘Your Detail’ Section**

**Update Company Details**

Complete all the information below in order to register a new provider.

1 Your details  
2 **Company details**  
3 Company address  
4 Address for receipt of notice  
5 Term and Conditions

✓ Your Details

First Name  
First Name

Last Name  
Last Name

Company email  
laila.zaghari@capgemini.com  
Your company email address

## 4.4. Update Company Details: Completing Your Company Details Section

- The user is able to update only the *Company Name*, *Company Registration Number* or *Company Phone Number* fields. Please note that the Company Name field **is not available for editing**. If the User requires a change to the Company Name, they should approach the NGESO Account Managers directly via email or phone.
- Please note that as the Company Phone Number is marked in a red asterisk, this indicates that it requires a specific format and if a number is entered incorrectly, an error message will appear to this effect.

Figure 16.0: Update 'Your Company Details' Section

**Update Company Details**

Complete all the information below in order to register a new provider.

1 Your details

2 Company details

3 Company address

4 Address for receipt of notice

5 Term and Conditions

> Your Details

▼ Company Details

Company name  
Emirates stadium

Company Registration Number (UK Company House Number)  
Company Registration / H

\* Company Phone number  
▼

## 4.5. Update Company Details: Completing Your Company Address Section

- The user is able to update all fields with the exception of the *Country of Incorporation* field. If the User requires a change to this field, they should approach the NGESO Account Managers directly via email or phone.

**Figure 17.0: Update ‘Your Company Address Details’ Section**

**Update Company Details**

Complete all the information below in order to register a new provider.

1 Your details

2 Company details

3 Company address

4 Address for receipt of notice

5 Term and Conditions

> Your Details

> Company Details

▼ Company address

Street

City

County / State (optional)

Postcode

Country

Country of incorporation



## 4.6. Update Company Details: Completing Your Company Address for Receipt of Notice

- The user is able to update all fields with the exception of the *Country of Incorporation* field. If the User requires a change to this field, they should approach the NGESO Account Managers directly via email or phone.
- Please ensure the check box is ticked if the Address for receipt of notice is different from the Company address if this is the case.

**Figure 18.0: Update 'Your Company Address for Receipt of Notice' Section**

▼ Address for receipt of notice

☒ Address for receipt of notice is different from the Company address

Street  
Street

City  
City

County / State (optional)  
County / State

Postcode  
Postcode

Country  
Country ▼

Country of incorporation  
Country of incorporation ▼

## 4.7 Terms & Conditions: Confirmation

- Upon varying, updating or modifying the User's contact or Company (Account) Details sections, they are expected to adhere to the Terms & Conditions and therefore complete this section before being granted the ability to save the record details or changes made.
- Please ensure the check box is ticked otherwise the user will be prevented from saving the changes successfully.

Figure 19.0: Confirm 'Terms & Conditions' Section

5 Term and Conditions

> Company address

▼ Address for receipt of notice

☐ Address for receipt of notice is different from the Company address

Terms & Conditions

By submitting this form, you make the following declarations:

That it has complied with all laws intended to prohibit or restrict anti competitive practices relevant to its participation in activities associated with procurement by NGESO of Balancing Services;

That neither it nor any Affiliate has engaged in any market manipulation in relation to the wholesales energy markets; That neither it nor any Affiliate has done anything which would constitute a breach of the Bribery Act 2010 with a view to influencing the outcome of any procurement activity by NGESO in relation to Balancing Services; and

That neither it nor any Affiliate has offered to pay or give any sum of money, inducement or valuable consideration directly or indirectly to any employee of NGESO.

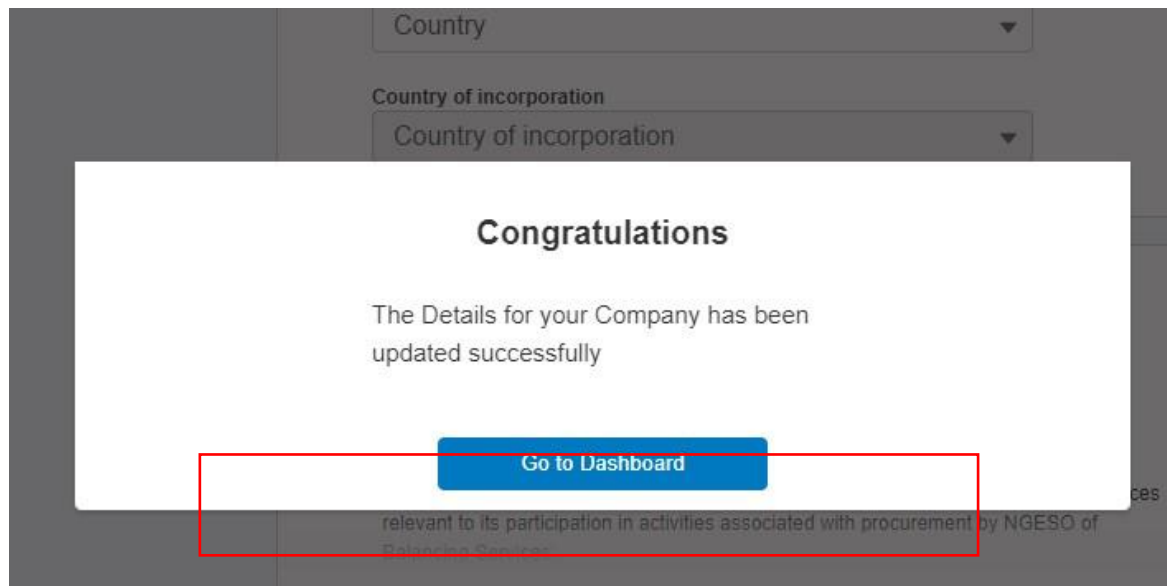
▼

☐ I agree to the Terms and Conditions

## 4.8 Confirmation Notification Screen

- Once the Terms & Conditions section is completed, the User will be presented with a pop up notification screen as acknowledgment that their changes have been saved. They then have the option to navigate to the Home Page (Unit Management) by selecting the “Go to Dashboard” button.

Figure 20.0: Confirmation of Changes Notification Screen



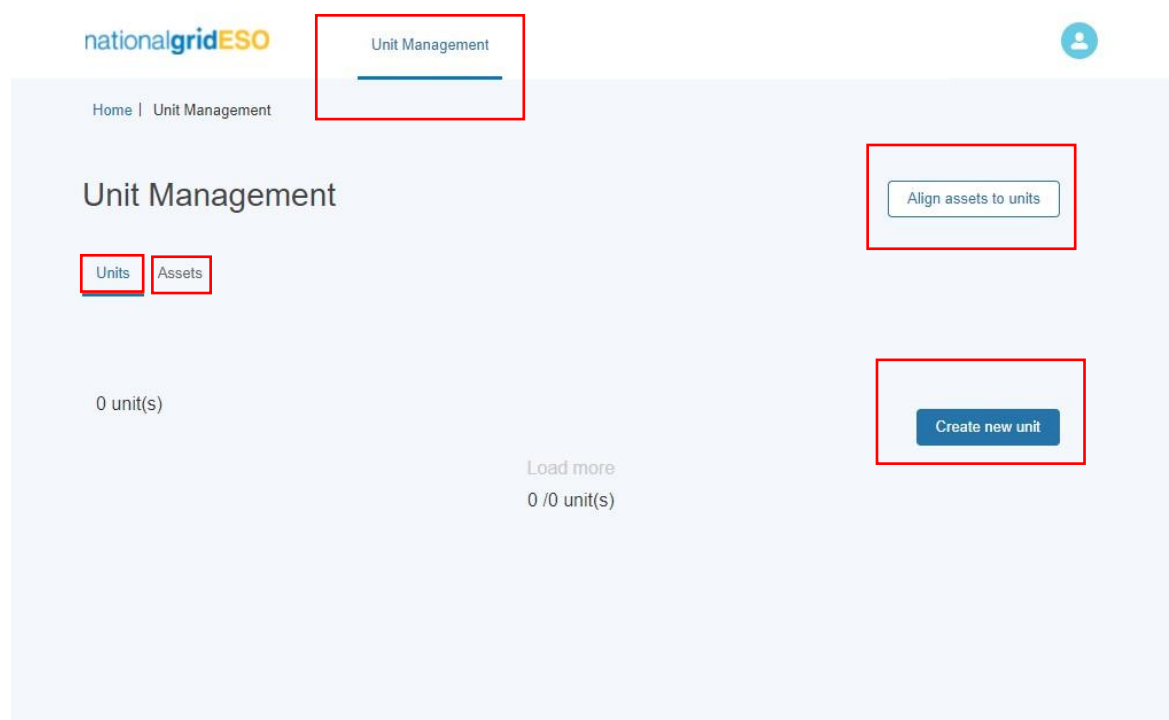
# 5. Asset & Unit Management Home Page

## 5.1. Navigating the Landing Page for Unit & Asset Management.

- The Unit Management Page is made up of several components as follows;
  - Unit Management Tab: Click on this to always land back on this page.
  - Units & Asset Sub Tabs: Click on these to switch between the collection of Units and collection of Assets
  - Create New Unit: Click on this to register a new unit\*
  - Align assets to Units: Click on this to undertake the alignment of assets to Units\*

\*Subsequent sections in this guide will cover each of these features in depth.

**Figure 21.0: Asset & Unit Management Home Page Screen**



## 6. Creating & Managing Assets

### 6.1. Create an asset

- To register a new asset, the first step is to click on the 'Create new asset' where a user will be presented with the screen illustrated in Figure 22.0 'New Asset registration' where a unique asset name will be required. Please note that firstly an asset cannot be created without an asset name and secondly the name must be **unique in naming convention to the asset in question**. Once the asset name is provided, the user will be able to progress to the next step by clicking **create**.

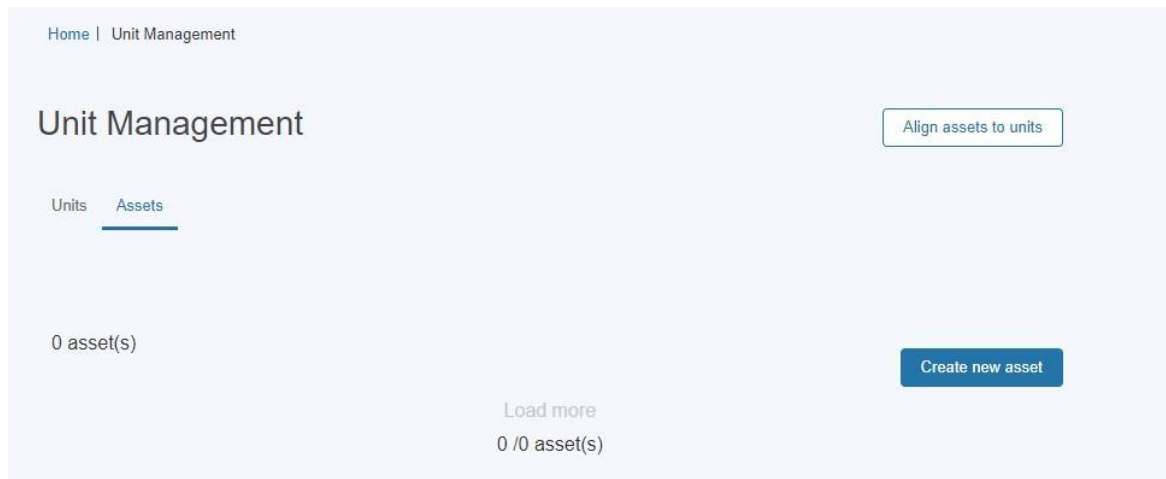


Figure 22.0: Creating Assets- Asset Registration

The image shows a 'New asset registration' form. The title 'New asset registration' is at the top. Below the title, the instruction 'Choose a name for this new Asset' is displayed. There is a text input field with the placeholder 'Asset name'. Above the input field, the label '\* Asset name' is shown. Below the input field, there are two buttons: 'Cancel' and 'Create'. The 'Create' button is highlighted with a red border.

## 6.2. Asset Registration: Submitting Asset Information

- The user is navigated to the Asset Registration Page as outlined in Figure 23.0, the format is similar to the Account Management Page structure with an accordion section on the left-hand side for direct navigation to a specific section or the user can select the sub section they wish to complete.
- The figure illustrates the unique named asset for which the details are being registered; *"Roedean WindFarm"*
- Please note that the user is not able to progress the registration process for a created asset without completing all the sections and corresponding fields.

Figure 23.0: Asset Registration Detail Page

The screenshot displays the 'New asset registration' page. At the top, there is a breadcrumb trail: 'Home | Unit Management'. Below this, the title 'New asset registration' is followed by a text input field containing 'Roedean WindFarm'. A message states: 'Complete all the information below in order to complete the registration of a new asset'. The main content area features a left-hand sidebar with a vertical list of four sections: '1 Asset Details', '2 Connection Details', '3 Site Location', and '4 MPAN'. The 'Asset Details' section is highlighted with a red box. To the right of the sidebar, there is a large form area with four sections, each with a right-pointing chevron and a title: '> Asset Details', '> Connection Details', '> Site Location', and '> MPAN'. The 'Asset Details' section is also highlighted with a red box. At the bottom of the page, there are two buttons: 'Save and create new one' and 'Save asset'.



## 6.3. Asset Registration: Asset Details Section

- Figure 24.0 illustrates the Detail Section for the Asset.
- Please note that as the *Asset Ownership*, *Asset Type*, the *Effective from Date* and *Fuel Type* are all mandatory and therefore marked in a red asterix. It is essential that these fields have information submitted.
- Please consult the Glossary Appendix for a translation of the Fields if the User is not clear about what is being requested.

Figure 24.0: Completing the 'Asset Details' Section

**New asset registration**

**Roedean WindFarm**

Complete all the information below in order to complete the registration of a new asset

1 Asset Details

2 Connection Details

3 Site Location

4 MPAN

▼ Asset Details

\* Asset Ownership

☐ I am the asset owner

☐ I am not the asset owner

Company Registration No. of Owner

\* Asset Type

☐ Generation Unit

☐ Demand Unit

\* Effective From Date

Effective From Date

Complete this field.

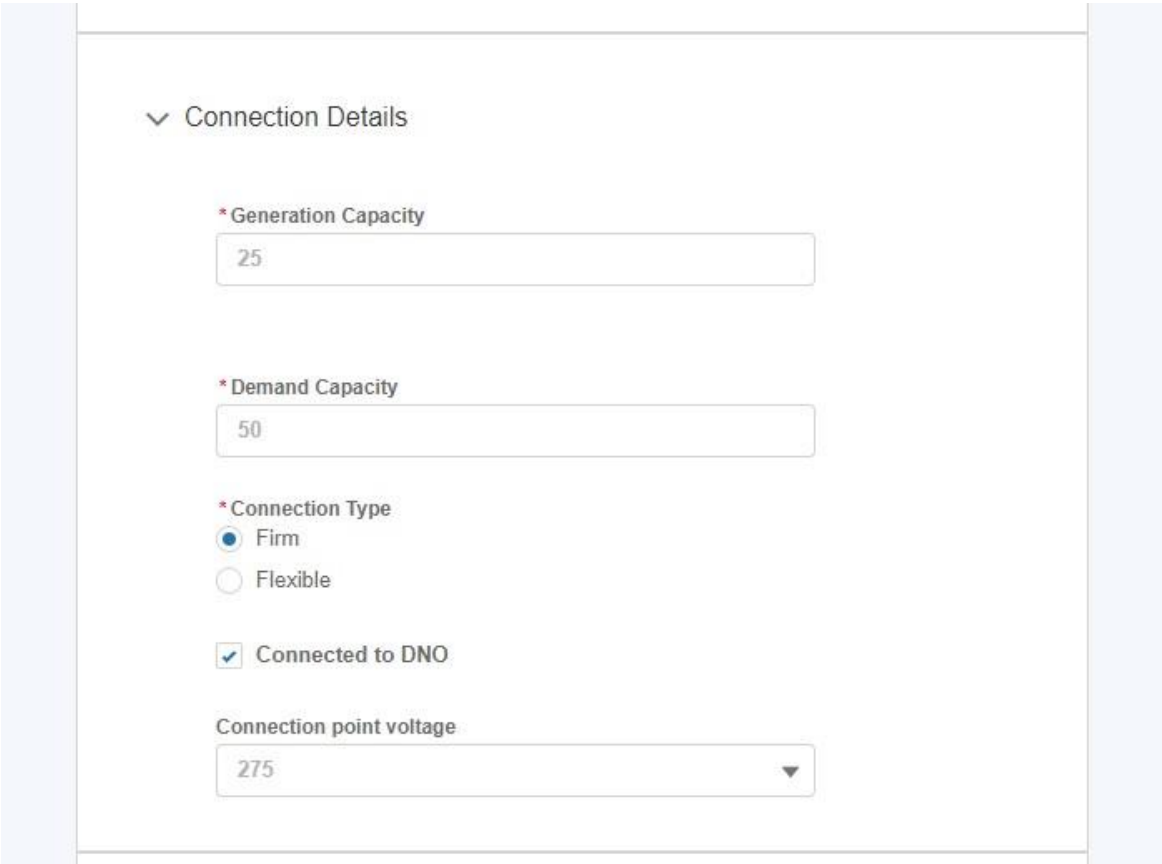
\* Fuel Type

Select Fuel Type ▼

## 6.4. Asset Registration: Asset Connections Section

- Figure 25.0 illustrates the Asset Connection Details Section for the Asset.
- Please note that as the *Generation Capacity*, *Demand Capacity*, the *Connection Type* are all mandatory and therefore marked in a red asterix. It is essential that these fields have information submitted.

**Figure 25.0: Completing the 'Asset Connection Details' Section**



The screenshot displays a web form titled "Connection Details" with a downward arrow icon. The form contains several input fields and checkboxes. The first field is labeled "\* Generation Capacity" and contains the value "25". The second field is labeled "\* Demand Capacity" and contains the value "50". The third field is labeled "\* Connection Type" and has two radio button options: "Firm" (selected) and "Flexible". Below these is a checkbox labeled "Connected to DNO" which is checked. The final field is labeled "Connection point voltage" and is a dropdown menu showing "275".

▼ Connection Details

\* Generation Capacity  
25

\* Demand Capacity  
50

\* Connection Type  
☒ Firm  
☐ Flexible

☒ Connected to DNO

Connection point voltage  
275 ▼

## 6.5. Asset Registration: Asset Site Location

- Figure 26.0 illustrates the Site Location Section for the Asset.
- Please note that as the *Asset Latitude*, *Asset Longitude*, the *Nearest Node*, *Grid Supply Point*, *GSP Group ID*, *GSP Group ID (location picklist)*, *Primary Dispatch phone number* & *Secondary dispatch phone number* are all mandatory and therefore marked in a red asterix. It is essential that these fields have information submitted.
- The Grid Supply Point (GSP) field is multiple choice, so a user can select several values as indicated in the figure below.

**Figure 26.0: Completing the 'Asset Site Location Details' Section**

The screenshot displays the 'Site Location' section of a form. It includes the following fields and options:

- \*Post Code:** Text input with 'BR1 2RP'.
- \*Asset Latitude:** Text input with '12342532523'. A red error message below reads: 'Please enter a value between -90 to 90'.
- \*Asset Longitude:** Text input with '321431'. A red error message below reads: 'Please enter a value between -180 to 180'.
- \*Nearest node:** Text input with 'EWQRWQ'.
- \*Grid Supply Point (GSP):** A multiple-choice selection area enclosed in a red box. It features two columns of options with arrows between them. The left column includes: ABNE\_3, ABTH\_1, ALDW\_31, ALNE\_3, ALVE\_1, AMEM\_1, and ARMO\_3. The right column includes: ABHA\_1, ALDW\_32, and ARBR\_3.
- \*GSP Group Id:** A dropdown menu with 'London' selected.
- \*Primary despatch phone number:** A dropdown menu with 'United Kingdom (44)' and a text input with '7898567654'.
- \*Secondary despatch phone number:** A dropdown menu with 'United Kingdom (44)' and a text input with '7089797969'.
- Despatch fax number:** A dropdown menu with 'Select country code' and an empty text input.

## 6.6. Asset Registration: Asset MPAN Details

- Figure 27.0 illustrates the MPAN Details Section for the Asset.
- Please note that as the *Operational Metering Availability*, *MPAN Import* and *MPAN Export*, are all mandatory and therefore marked in a red asterisk. It is essential that these fields have information submitted.
- For additional clarification, the user can hover over the 'i' icon for 'Help Text' as illustrated in the figure below.

Figure 27.0: Completing the 'Asset MPAN Details' Section

The screenshot displays the 'MPAN' section of a form. It includes a dropdown menu for 'MPAN' and four mandatory fields, each marked with a red asterisk and a red-bordered help icon (i). The fields are: 'Operational Metering Availability' with radio buttons for 'Yes' and 'No'; 'MPAN Import' with a text input field and a red error message 'Complete this field.'; 'MPAN Export' with a text input field and a red error message 'Complete this field.'; and 'Additional MPAN Import' and 'Additional MPAN Export' with text input fields. The help icons for the last three fields are highlighted with red boxes.

MPAN

\* Operational Metering Availability

☒ Yes

☐ No

\* MPAN Import *i*

Complete this field.

\* MPAN Export *i*

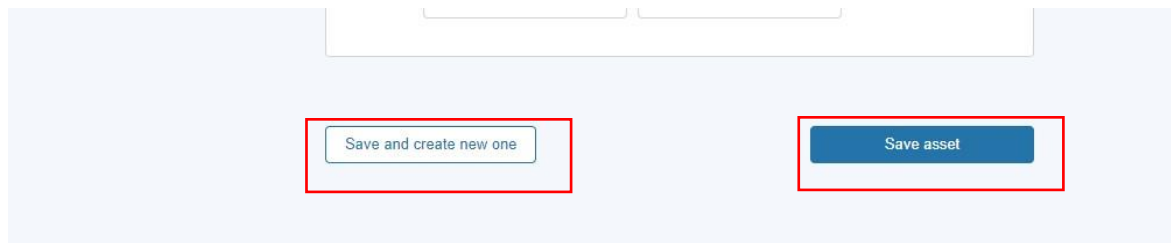
Complete this field.

Additional MPAN Import *i* Additional MPAN Export *i*

## 6.7. Asset Registration: Save Asset Detail Submission.

- Once all the sections are completed correctly, then the 'Save Asset' button will appear in a blue background, enabling the user to complete the registration process for creating the asset.
- If the User wishes to repeat the exercise and create subsequent assets, they can select the 'save and create new one' button instead.

**Figure 28.0: Confirmation of Asset Saved Successfully.**



## 6.8. Asset Registered: Asset Tile

Following on from the Asset Registration, the asset tile will appear on the Unit Management Home Page under the '**Asset Tab**'. Each asset will have a corresponding tab. The tile displays the 'key or summary information'. To view the full registration details, click on the **three dots on the right hand corner of the tile**. The user then selects the '**View Asset Details**' link to be re-directed to the Asset Detail page expanded version.

*Please note that for Release 1.0, Users will be expected to submit all asset information at once. Upon 'saving the asset' registration details, the Asset Status will appear as 'Accepted' automatically as illustrated in Figure 29.0*

**Figure 29.0: Asset Tiles**

The screenshot displays the 'Assets' tab in a unit management system. It shows two asset tiles, each representing a wind farm. Both assets are in an 'Accepted' status, indicated by a green dot and the word 'Accepted'. Red boxes are drawn on the image to highlight the 'Asset Id' field and the three-dot menu icon in the top right corner of each asset tile.

Asset Name	Asset Id	Type	Generation Capacity(MW)	Demand Capacity(MW)
Peacehaven Wind Farm	AST-0174	Demand Unit		60
Roedean WindFarm	AST-0173	Generation Unit; Demand Unit	25	50

At the bottom right of the interface, there is a 'Load more' link and a counter showing '2 / 2 asset(s)'.

## 7. Creating & Managing Units

### 7.1. Create a Unit

- To register a new Unit, the first step is to click on the 'Create new unit' where a user will be presented with the screen illustrated in Figure 29.0 'New Unit registration' where a unique Unit name will be required. Please note that firstly a Unit cannot be created without a Unit name and secondly the name must be **unique in naming convention to the Unit in question**. Once the Unit name is provided, the user will be able to progress to the next step by clicking **create**.

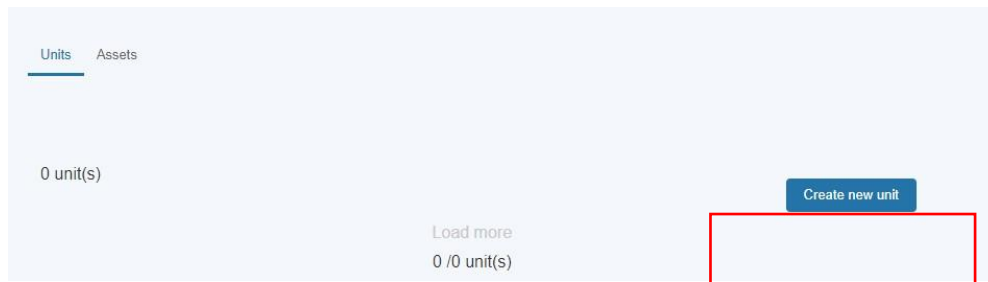
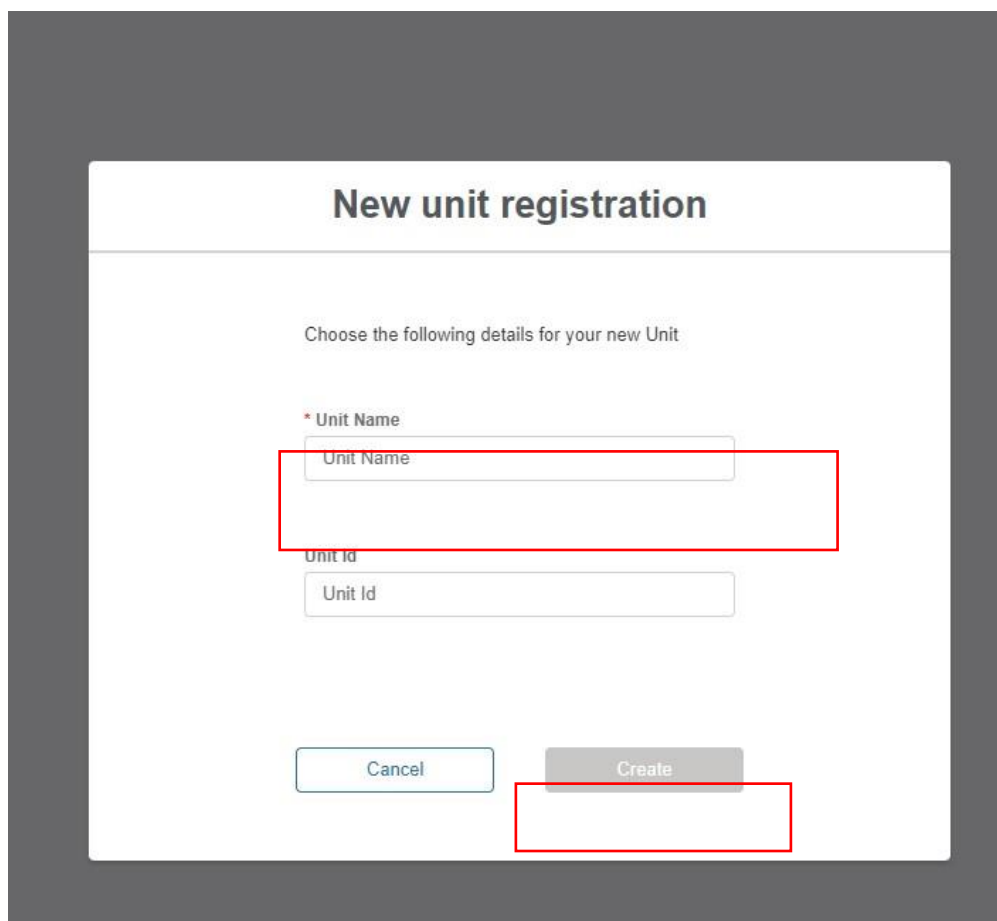


Figure 29.0: Create Unit

A screenshot of a 'New unit registration' form. The title 'New unit registration' is at the top. Below it, the instruction 'Choose the following details for your new Unit' is displayed. The form contains two input fields: 'Unit Name' (marked with an asterisk) and 'Unit Id'. The 'Unit Name' field is highlighted with a red rectangular box. At the bottom of the form, there are two buttons: 'Cancel' and 'Create'. The 'Create' button is highlighted with a red rectangular box.

## 7.2. Unit Registration: Overview Page

- The user is navigated to the Unit Registration Page as outlined in Figure 30.0, the format is similar to the Asset Registration Page structure with an accordion section on the left-hand side for direct navigation to a specific section or the user can select the sub section they wish to complete.
- The figure illustrates the unique named Unit for which the details are being registered; *"Sussex Coast Renewables"*
- Please note that the user is not able to progress the registration process for a created Unit without completing all the sections and corresponding fields.

Figure 30.0: Unit Registration Detail Page

The screenshot shows the 'New Unit Registration' page for a unit named 'Sussex Coast Renewables'. The page has a light blue background. At the top, the title 'New Unit Registration' is in bold. Below it, the unit name 'Sussex Coast Renewables' is displayed in a light blue box. A subtitle reads: 'Complete all the information below in order to complete the registration of a new unit'. On the left, there is a vertical accordion menu with three items: '1 Unit Details', '2 Connection Details', and '3 Site Location'. The 'Unit Details' item is selected and highlighted with a red box. To the right of the menu, there are three corresponding form sections, each with a red box around its header: '> Unit Details', '> Connection Details', and '> Site Location'. At the bottom, there are two buttons: 'Save and create new one' (disabled, light grey) and 'Save unit' (active, dark grey).



## 7.3. Submitting Unit Information: Unit Details Section

- Figure 31.0 illustrates the Detail Section for the Unit.
- Please note that as the *Unit Type*, the *Effective from Date* and *Fuel Type* are all mandatory and therefore marked in a red asterix. It is essential that these fields have information submitted.

**Figure 31.0: Completing the 'Unit Details' Section**

Complete all the information below in order to complete the registration of a new unit

1 Unit Details

2 Connection Details

3 Site Location

Unit Details

\*Unit Type

☒ Generation Unit

☒ Demand Unit

\*Effective From Date

01-Jul-2022

\*Fuel Type

Wind

Applicable Market

☒ Balancing Services

## 7.4. Submitting Unit Information: Unit Connection Section

- Figure 32.0 illustrates the Unit Connection Details Section for the Asset.
- Please note that as the *Generation Capacity*, *Demand Capacity*, the *Connection Type*, *Connected to DNO* and *DNO Type (picklist field)* are all mandatory and therefore marked in a red asterix. It is essential that these fields have information submitted.

**Figure 32.0: Completing the 'Unit Connection Details' Section**

The screenshot shows a web form interface for 'Unit Connection Details'. On the left, a sidebar contains three numbered steps: 1. Unit Details, 2. Connection Details (highlighted), and 3. Site Location. The main content area is titled '> Unit Details' and contains a section 'v Connection Details'. This section includes several mandatory fields marked with a red asterisk (\*):

- \* Generation Capacity**: A text input field containing the value '25'.
- \* Demand Capacity**: A text input field containing the value '100'.
- \* Connection Type**: A radio button group with two options: 'Firm' (selected with a blue dot) and 'Flexible' (unselected).
- \* Connected to DNO**: A checkbox that is checked, with a small blue square icon to its left.
- \* DNO Type**: A dropdown menu showing 'UK Power Networks'.
- Connection point voltage**: A dropdown menu showing '400'.

## 7.5. Submitting Unit Information: Unit Site Location Section

- Figure 33.0 illustrates the Unit Site Location Section for the Unit
- Please note that as the *Grid Supply Point*, *GSP Group ID*, *GSP Group ID (location picklist)*, *Primary Dispatch phone number* & *Secondary dispatch phone number* are all mandatory and therefore marked in a red asterix. It is essential that these fields have information submitted.
- The Grid Supply Point (GSP) field is multiple choice, so a user can select several values as indicated in the figure below.

**Figure 33.0: Completing the 'Unit Site Location Details' Section**

▼ Site Location

Post Code  
BN2 4RD

Unit Latitude  
2

Unit Longitude  
2

Nearest node (if known)

\* Grid Supply Point (GSP)

ABHA_1	▶	ABNE_3	▲
ABTH_1		ALNE_3	
ALDW_31	◀	AMEM_1	▼
ALDW_32		ARMO_3	
ALVE_1			
ARBR_3			
AXMI_1			

\* GSP Group Id  
London ▼

\* Primary despatch phone number  
United Kingdom (44) ▼ 6464578574

\* Secondary despatch phone number  
United Kingdom (44) ▼ 5756767865

Despatch fax number  
Select country code ▼

## 7.6. Submitting Unit Information: Confirmation of Submission.

- Once all the sections are completed correctly, then the 'Save Unit' button will appear in a blue background, enabling the user to complete the registration process for creating the Unit.
- If the User wishes to repeat the exercise and create subsequent Units, they can select the 'save and create new one' button instead.

**Figure 34.0: Confirmation of Asset Saved Successfully.**

**New Unit Registration**

**Sussex Coast Renewables**

Complete all the information below in order to complete the registration of a new unit

1 Unit Details

2 Connection Details

3 Site Location

> Unit Details

> Connection Details

> Site Location

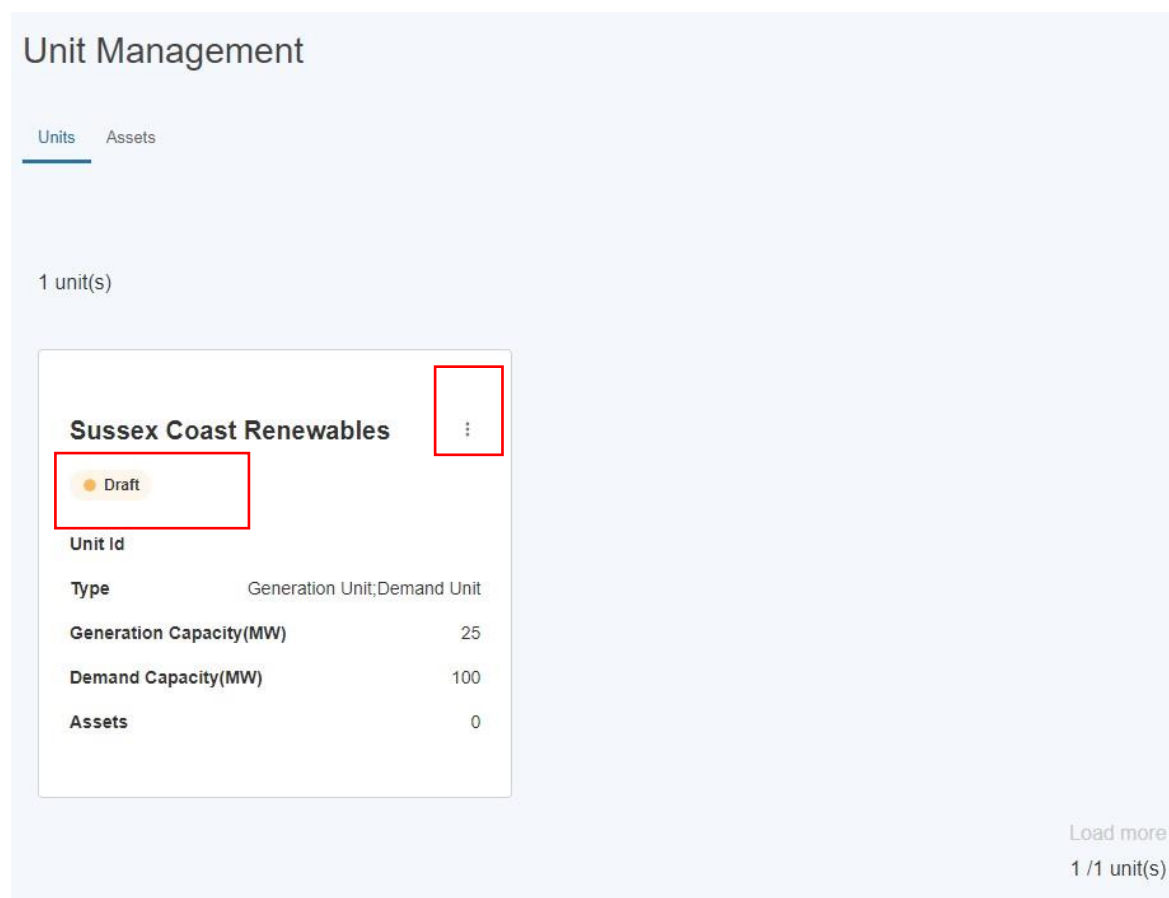
Save and create new one

Save unit

## 7.7. Modifications to Registration of Units

- Following on from the Unit Registration, the asset tile will appear on the Unit Management Home Page under the **'Units Tab'** . Each asset will have a corresponding tab. The tile displays the 'key or summary information'. To view the full registration details, click on the **three dots on the right-hand corner of the tile**. The user then selects the **'View Unit Details'** link to be re-directed to the Unit Detail page expanded version.
- Users have the ability to retrospectively edit Unit Registration Details before final submission. Upon 'saving the Unit' registration details, the Unit Status will appear as 'Draft' automatically as illustrated in Figure 35.0
- To make edits, the user should click on **'Edit Unit Details'** link to be re-directed to the Unit Detail page expanded version They then have the ability to edit the sections or specific fields desired. The Unit Status will appear as 'Submitted' once the Unit is finally submitted for consideration.
- Once the Unit is submitted for approval, the NGESO Registration Team will a) assign the Unit a Unit ID (which will autopopulate on the Unit Id field) b) set the Unit Status field from 'submitted' to 'approved' or 'rejected'.

Figure 35.0: Unit Tiles



**Figure 35.1: Edit Unit Details & View Expanded Unit Details Page for Editing**

Home | Unit Management | Unit Details

[← Back](#)

Disney

> Roedean Windfarm

> Peacehaven Wind Farm

> Eastbourne Wind Farm

StatusDraft

Asset Number3

Actions

[✎ Edit Unit Information](#)

Update Unit Information

Disney

Complete all the information below in order to update the existing unit

1Unit Details

2Connection Details

3Site Location

> Unit Details

> Connection Details

> Site Location

Update and create new one

Update unit

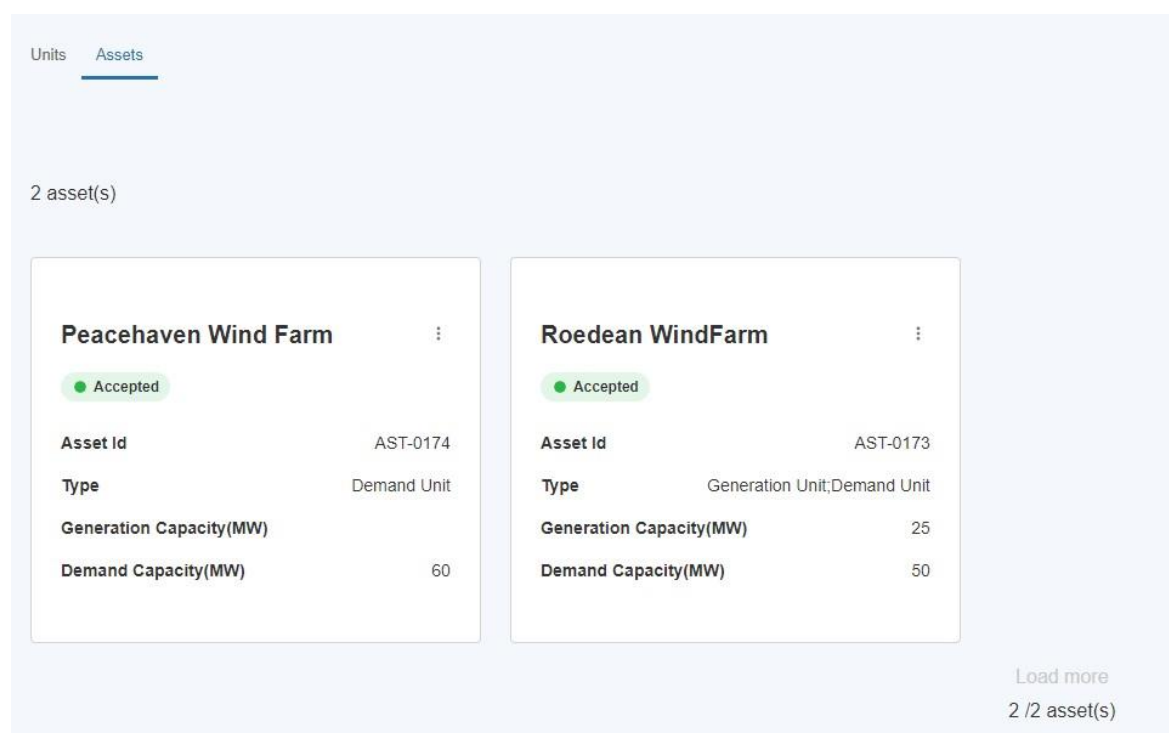
## 8. Asset to Unit Alignment

### 8.1. Grouping Assets by Unit (Asset Alignment)

- Prior to initiating the Pre-qualification Process, the registered asset(s) must be aligned to a specified Unit(s). To align assets to units, it is pre-supposed that the asset(s) and the unit(s) have all been registered in advance. If this is not the case, the user must ensure these steps are completed.
- When ready, the User must select 'Align Assets to Units' on the Unit Management Landing Page



Figure 36.0: Align Assets to Unit



## 8.2. Selecting Unit for Grouping

- The User will be prompted to select or identify the Unit for grouping or alignment. The user can search by entering the Unit Name in the search bar. Please note the exact naming of the Unit to produce a successful search result.

Home | Unit Management | Align assets to unit

← Back

### Align assets to unit

Search for the unit you want to align assets to.

Use unit

## 8.3. Match & Un-matching selected assets to Unit for Grouping

- The User will be then be presented with two adjacent columns 1) the Unit selected in the search result on the left-hand column and 2) all available registered assets eligible for grouping on the right-hand side.

**Figure 37.0: Asset Alignment Screen**

Home | Unit Management | Align assets to unit

← Back

### Align assets to unit

Search for the unit you want to align assets to.

Use unit

**Unit name** Sussex Coast Renewables

0 assets

Name	Type	Generation Capacity	Demand Capacity
------	------	---------------------	-----------------

Move all Move selected

**Available assets**

2 assets

Name	Type	Generation Capacity	Demand Capacity
<input type="checkbox"/> Roedean Wind Farm	Generation Unit/Demand Unit	25	50
<input type="checkbox"/> Peacehaven Wind Farm	Demand Unit		60

Move all Move selected

Cancel Confirm



- If an asset is not listed, then the user will still have the option to use the search button to undertake a secondary search of the asset in question. The user must ensure they have the correct unique name reference to ensure a successful search result match. Once the asset(s) are identified, the User can either choose to a) 'move all' or b) 'move selected' assets to be grouped or aligned with the desired unit.
- Once the User is satisfied with the grouping they can then confirm the selection or alignment by selecting the **Confirm button** as illustrated in Figure 37.0 in the adjacent page.
- The User has the option to switch assets out of the grouping by 'moving selected' from the left column (unit name) to the right column (available assets) if they decide it was an incorrect grouping of assets for alignment and wish to reverse their decision before final confirmation. To enable this feature, the user must check the box against each asset on the left-hand column and select "Move Selected" to transfer the assets back into the right-handed column (available assets). This may be required when a user decides it was an incorrect grouping of assets for alignment and wish to reverse their decision before final confirmation.
- The User will receive a confirmation pop up notification to alert them to the Unit Grouping being completed.

**Figure 38.0: Asset Alignment Screen – Reverse decision**

Unit name: Sussex Coast Renewables
2 assets

Name	Type	Generation Capacity	Demand Capacity
<input checked="" type="checkbox"/> Roedean Wind Farm	Generation Unit Demand Unit	25	50
<input type="checkbox"/> Peacham Wind Farm	Demand Unit	50	0

Move all
Move selected

Available assets
0 assets

Name	Type	Generation Capacity	Demand Capacity
------	------	---------------------	-----------------

Move all
Move selected

## 8.4. Asset Alignment for multiple units

- There will be a requirement for Users to undertake secondary alignments between assets and additional units beyond the initial grouping. In this instance, users are given the ability to deploy the same assets to be grouped under different Units.
- Figure 39.0 illustrates the example where 2 Units have been created, but both Units will be aligned to one specific asset. For example Hampshire Coast Renewables Unit is made up of both *Peacehaven Wind Farm* AND *Roedean Wind Farm*. Sussex Coast Renewables is only made up of Peacehaven Wind Farm. Therefore the Asset Peacehaven Wind Farm is being aligned to 2 independent Units. This configuration is possible during the registration stage by repeating the asset alignment exercise for each Unit in turn.

**Figure 39.0: Multiple Units for Alignment with existing assets**

The screenshot displays the 'Unit Management' interface with two tabs: 'Units' and 'Assets'. The 'Units' tab is active, showing a list of 2 units. Below the list, two unit cards are displayed, both marked as 'Draft'.

**Hampshire Coast Renewables**

- Status: Draft
- Unit Id: [blank]
- Type: Demand Unit
- Generation Capacity(MW): [blank]
- Demand Capacity(MW): 2
- Assets: 0

**Sussex Coast Renewables**

- Status: Draft
- Unit Id: [blank]
- Type: Generation Unit, Demand Unit
- Generation Capacity(MW): 25
- Demand Capacity(MW): 110
- Assets: 2

At the bottom right, there is a 'Load more' link and a pagination indicator '2 / 2 unit(s)'.

## 9. Prequalification for Services

### 9.1. Identifying Units to participate in Pre-qualification

Once the Units and Assets have been registered and the Alignment exercise has been undertaken, the user is in a position to identify units they wish to elect for participation in the Market and subject to the pre-qualification process.

To start, the user must navigate to the selected unit on the Unit Management home page and hover over the right hand three corner and click on the three dots on the Unit tile as highlighted in the Figure below. They will be prompted with the link '**pre-qualify for services**'

**Figure 40.0: Pre-qualify for Services Link**

The screenshot shows the 'Unit Management' interface. At the top, there are tabs for 'Units' and 'Assets'. Below the tabs, it says '1 unit(s)'. A unit tile for 'Sussex Coast Renewables' is displayed. The tile has a 'Draft' status indicator. Below the unit name, there is a table with the following data:

Unit Id	
Type	Generation Unit; Demand Unit
Generation Capacity(MW)	25
Demand Capacity(MW)	100
Assets	0

A red box highlights the three-dot menu icon in the top right corner of the unit tile. At the bottom right of the interface, there is a 'Load more' link and a counter '1 / 1 unit(s)'.

## 9.2. Pre-qualification Home Page

The user will then be presented with the Pre-qualify for Services Page as illustrated in Figure 41.0 and prompted to then select the services to pre-qualify the Unit for.

**Figure 41.0: Pre-qualify for Services Page**

The screenshot shows a web interface for pre-qualifying services. At the top, there is a breadcrumb trail: "Home | Unit Management | Pre-qualify for Services". Below this is a "Back" link with a left-pointing arrow. The main heading is "Hampshire Coast Renewables", which is highlighted with a red rectangular box. Below the heading is a prompt: "Select the services you want this unit to qualify for and provide all the information required for submission". The next section is titled "Select Services" and contains the instruction "Add the services you want for Hampshire Coast Renewables." followed by a note: "\*\*\*Note - Please make sure you align assets to this unit before submitting for pre-qualification." Below the note is a button labeled "+ Add Service", also highlighted with a red rectangular box. The bottom portion of the page is a large, empty light blue rectangular area.

### 9.3. Identifying Services to apply for pre-qualification for selected Unit.

- The user will then be presented with the current six services they can select from. To select the user checks the checkbox. A user can select all six services.
- The user then selects the “Confirm Selection” button to proceed to the next step.

**Figure 42.0: Services Selection Screen**

The screenshot shows the 'Select Services' screen. At the top, it says 'Select Services' and 'Add the services you want for Hampshire Coast Renewables.' Below this is a note: '\*\*\*Note - Please make sure you align assets to this unit before submitting for pre-qualification.' There are six checkboxes for services: 'Dynamic Regulation HF', 'Dynamic Regulation LF', 'Dynamic Containment LF', 'Dynamic Containment HF', 'Dynamic Moderation LF', and 'Dynamic Moderation HF'. All checkboxes are currently unchecked. A blue 'Confirm Services' button is located below the checkboxes. A red box highlights the 'Confirm Services' button, and another red box highlights the 'Dynamic Regulation LF' checkbox.

### 9.4. De-selecting Services to apply for pre-qualification for selected Unit.

- If the user makes an error or wishes to reverse the decision to not select a particular service, they can simply uncheck the tick box before proceeding to the next step. If a user decides to make this decision after proceeding with completing the Service 'data capture' sub-sections, this is also possible by unchecking the service checkbox and clicking the 'confirm services' button.

The first screenshot shows the 'Select Services' screen with the 'Dynamic Regulation LF' and 'Dynamic Containment LF' checkboxes checked. The 'Confirm Services' button is visible. Below the checkboxes, a blue bar highlights the 'Dynamic Regulation HF' service, and a 'Save Draft' button is visible.

The second screenshot shows the 'Select Services' screen with the 'Dynamic Regulation LF' and 'Dynamic Containment LF' checkboxes checked. The 'Confirm Services' button is visible. Below the checkboxes, a blue bar highlights the 'Dynamic Regulation LF' service, and a 'Save Draft' button is visible. The 'Unit Calibration' section is also visible at the bottom.

- The user must note that if they proceed to populate service specific information for more than one service for the same Unit, in several attempts or over a duration of time (i.e they submit information for service x on day 1, but then go onto update the portal with additional submission of information for service x on day 3) that they can keep track of which service is still in flight (or 'draft') as opposed to 'submitted' by referencing the **'Service Status' field**. If the field value = Incomplete, then the submission for that service in example below *"Dynamic Containment LF"* has yet to be completed, and therefore will require the user to select the **'Confirm Services' button again**. This will ensure the secondary service submission has been accepted. If the Service Status Field = Submitted, then the application for that particular service, in the example below *"Dynamic Regulation HF"* has already been 'registered'.

**Figure 42.1: Service Status Field**

The figure consists of two screenshots from the nationalgridESO portal, illustrating the 'Service Status' field for different services.

**Top Screenshot: Dynamic Containment LF**

The 'Unit Calibration' section shows various input fields for service parameters. The 'Service Status' field is highlighted with a red box and contains the value 'Incomplete'. The 'Confirm Services' button is also highlighted with a red box.

**Bottom Screenshot: Dynamic Regulation HF**

The 'Unit Calibration' section shows various input fields for service parameters. The 'Service Status' field is highlighted with a red box and contains the value 'Submitted'. The 'Confirm Services' button is also highlighted with a red box.

## 9.5. Completing Pre-qualification Criteria Sections by Service: Unit Calibration Section

- Each service selected will present the user with a series of sub-sections to complete with criteria specific fields. Each service is identified by the highlighted row illustrated in the figure below.
- The first sub section is entitled **Unit Calibration** and the user is expected to populate the corresponding fields. All the metric fields in this section are marked in a red asterisk and therefore **mandatory**. A user will not be able to proceed with the pre-qualification process without submitting information.

**Figure 43.0: Services Specific Sub Section – Unit Calibration**

**Select Services**

Add the services you want for Hampshire Coast Renewables.

\*\*\*Note - Please make sure you align assets to this unit before submitting for pre-qualification.

<input checked="" type="checkbox"/> Dynamic Regulation HF	<input checked="" type="checkbox"/> Dynamic Regulation LF	<input checked="" type="checkbox"/> Dynamic Containment LF	<input type="checkbox"/> Dynamic Containment HF	<input type="checkbox"/> Dynamic Moderation LF	<input type="checkbox"/> Dynamic Moderation HF
---	---	--	---	--	--

[Confirm Services](#)

Dynamic Regulation HF

[Save Draft](#)

**Unit Calibration**

Complete the information to calibrate your unit.

*Allocated MW 000.00 MW	*Recovery period min	*Max Utilisation Period min	*Minimum Non Zero Time min	*Service Start Date DD-MMM-YYYY	*Service End Date DD-MMM-YYYY	*Operational Metering available Select an Option
*Response Time min	*Cease Time min	*Ramp-Up rate 000.00 MW/min	*Ramp-down rate 000.00 MW/min			

**Evidence**

You must download the documents at the link below, sign them and upload them as part of your Unit evidence.

[Download required documents](#)

## 9.6. Completing Pre-qualification Criteria Sections by Service: Evidence Section

- Each service will have a different evidence requirement for submission that will accompany the pre-qualification request for the unit selected. With this in mind, the evidence sub section will expect the user to undertake a series of sequential tasks;
  - Download the Evidence Template
  - Populate and Save the completed Evidence Template on the User's desktop or external Company/Organisation shared drive
  - Upload the saved and completed Evidence Template onto the Portal.

The illustrated screen shots in Figure 45.0 demonstrate each of these sequential tasks.

**Figure 45.0: Services Specific Sub Section – Unit Evidence**

**Evidence**

You must download the documents at the link below, sign them and upload them as part of your Unit evidence.

[Download required documents](#)

Upload all the evidence for this Unit, including the required documents once signed

Upload evidence

[Upload Files](#) Or drop files

Terms\_And\_Cond....docx



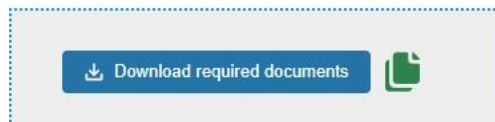
## 9.7. Example of Template for Download

The screenshot shows a Microsoft Word application window. On the left, a 'Document Recovery' sidebar is open, displaying a list of recovered documents, including 'Document1 [AutoRecovered]' with a version created on 19/01/2022 at 10:01. The main document area is titled 'BALANCING SERVICE: [NAME OF SERVICE]'. It contains a form with the following fields: 'Name of Registered Service Provider:', 'Country of incorporation:', 'Company number:', 'Registered office:', 'Address for receipt of notices (if not R/O):', 'Agent (if acting on behalf of above Registered Service Provider)', 'Name:', 'Country of incorporation:', 'Company number:', and 'Registered office:'. Below these fields, there is a section titled 'EITHER:' with two bullet points: '• DOWNLOAD THE DECLARATION AND ADHERENCE TEMPLATE [HERE] AND UPL [HERE] DULY SIGNED AND DATED BY A DIRECTOR OR OTHER DULY AUTHORIS SIGNATORY' and 'OR • IF YOU ARE A DIRECTOR OR OTHER DULY AUTHORISED SIGNATORY, ATTACH YOUR ELECTRONIC SIGNATURE WHERE SHOWN BELOW AND CLICK SUBMIT'. At the bottom, a note states: 'IN EITHER CASE, WHERE THE SIGNATORY IS NOT A DIRECTOR EVIDENCE IS REQUIRE AUTHORITY TO SIGN ON BEHALF OF THE REGISTERED SERVICE PROVIDER AND AGENT'. The status bar at the bottom indicates 'Page 1 of 2' and '633 words'.

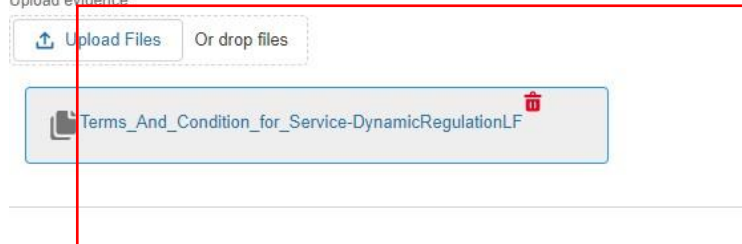
## 9.8. Uploading Completed Templates

### Evidence

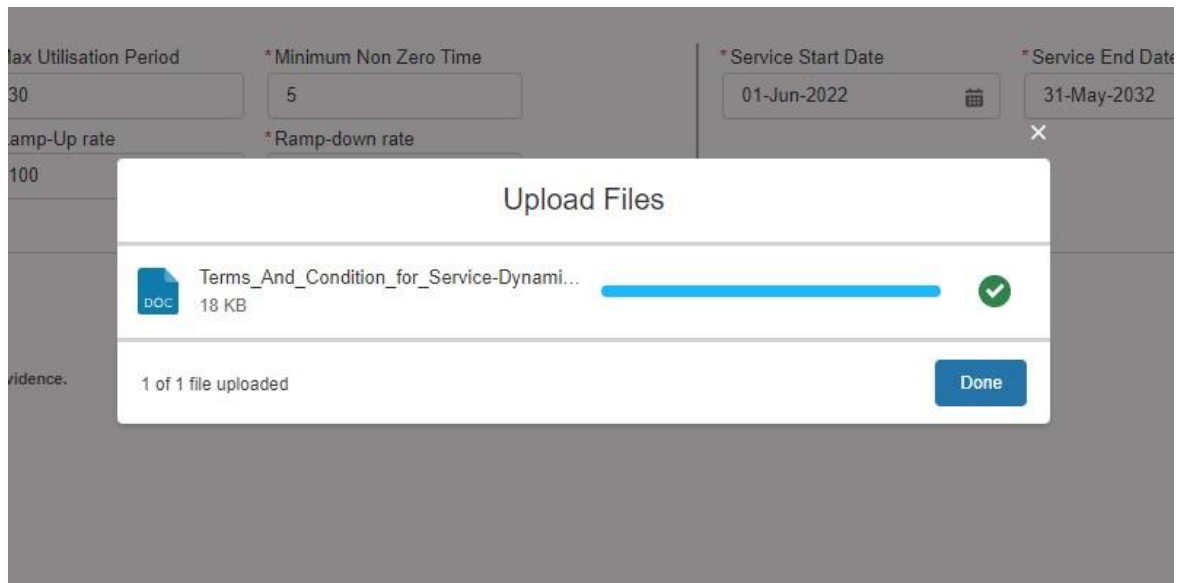
You must download the documents at the link below, sign them and upload them as part of your Unit evidence.



Upload all the evidence for this Unit, including the required documents once signed  
Upload evidence



## 9.9. Confirmation of Upload Completed



## 9.10. Completing Pre-qualification Criteria Sections by Service: Asset Testing Section

- The final sub-section to be completed requires gathering information on Asset Testing requirements for selected Service.
- As Figure 46.0 illustrates, each asset aligned to the Unit being considered will be listed and the corresponding asset testing data fields are expected to be populated by the user.
- Please note that whilst the fields are not marked in a red asterisk and therefore not currently designated as mandatory, a Unit cannot proceed with the pre-qualification request without the asset testing fields being completed.

**Figure 46.0: Services Specific Asset Testing**

The screenshot displays the 'Asset Testing' section of a form. It lists two assets, each with a table of testing data. The first asset, 'Roedean Wind Farm' (AST-0173), is a 'Generation Unit Demand Unit' with a capacity of 150. The second asset, 'Peacehaven Wind Farm' (AST-0174), is a 'Demand Unit' with a capacity of 60. Both assets have a 'Tested capacity' field set to 150 and a 'Date approved by ITE' field set to 03-Jan-2022.

Asset Name	Asset Id	Type	Capacity	Tested capacity	Date approved by ITE
Roedean Wind Farm	AST-0173	Generation Unit Demand Unit	150	150	03-Jan-2022
Peacehaven Wind Farm	AST-0174	Demand Unit	60	150	03-Jan-2022

## 9.11. Completion of Pre-qualification Criteria: Terms & Conditions Section

- The step preceding final submission involves completing the Service Specific Terms & Conditions Checkboxes.
- To access the Service Specific Terms & Conditions Documentation, the user is provided with a hyperlink illustrated in Figure 47.0 below.
- To complete the Pre-qualification process, the user must click on the **'Save Draft'** button. This will appear in blue in its activated state on condition that all the prior sub sections have been completed correctly. If it is in the shaded state, the user must revisit the sub sections and ensure that the fields are populated and the evidence has been uploaded correctly. The user has the option to review the draft application at a later stage when they next login to the portal.
- When the user is ready to submit the Unit for pre-qualification application for approval, they then select the Submit button in Figure 48.0. In this instance, the NGESO Account Manager will be notified and undertake an internal appraisal of the application for the selected Unit and Service.
- To apply for additional Units for Pre-qualification, the user simply repeats the steps in Chapter 9 for each respective Unit.

**Figure 47.0: Services Specific Terms and Conditions**

**Terms & Conditions**

Please make sure to read the documents available at this Link

☐ I have read the documents provided.

☐ I agree to the terms & conditions.

Save Draft

## 9.12. Confirmation of Submission of Pre-qualification Application Request.

**Figure 48.0: Final Submission of Pre-qualification Application for Approval by NGESO Account Managers.**

Terms & Conditions

Please make sure to read the documents available at [this Link](#).

☒ I have read the documents provided.

☒ I agree to the terms & conditions.

Save Draft

Submit

## 10. Glossary of Terms

Term	Description
Account	A Salesforce account.
Alignment of Assets	Assign one or more assets to a unit.
Asset	One Plant and Apparatus located at the same Grid Supply Point that has a single physical connection.
Asset Testing	The Asset test records, MW, Date of testing by an Independent Technical Engineer (ITE), which will be aligned against a service.
Balancing Service Provider	A market participant as defined by the Electricity Balancing Guidelines who is NGEESO's counterparty to a Balancing Services Contract.
Connection Type	This can be Firm or Flexible.
DNO Type	Distribution Network Operator.
Effective from Date	The date that an asset is live and connected to the Grid.
Grid Supply Point	The points where power is delivered from the transmission system to either a distribution network or a customer directly connected to the transmission system.
Pre-qualification for Services	Process of submitting data and evidence for a unit requesting approval for participation for a particular service.
Unit	A logical grouping of a single or multiple group of assets.
Unit Calibration	Process of assigning a unit across multiple services.
User	Registered user of SMP.

If you have any feedback on this document please email  
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