

User Registration and Management

Version 1.2
January 2024

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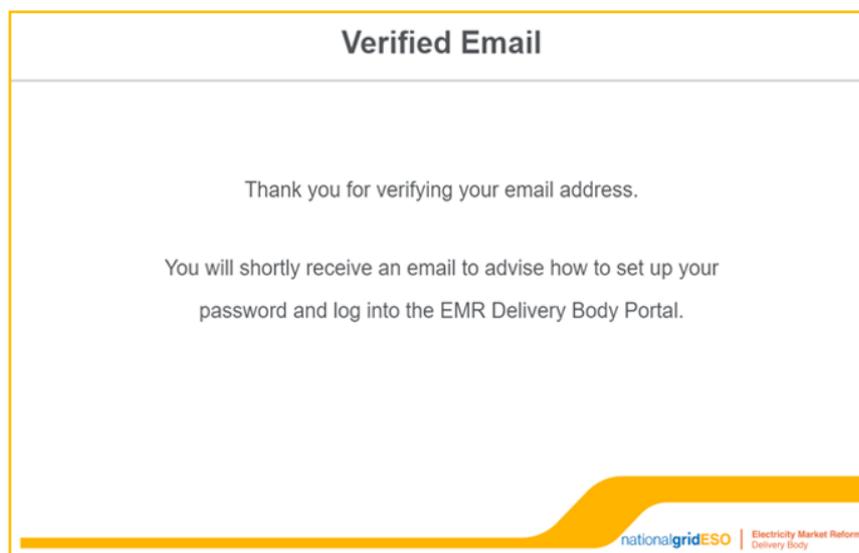
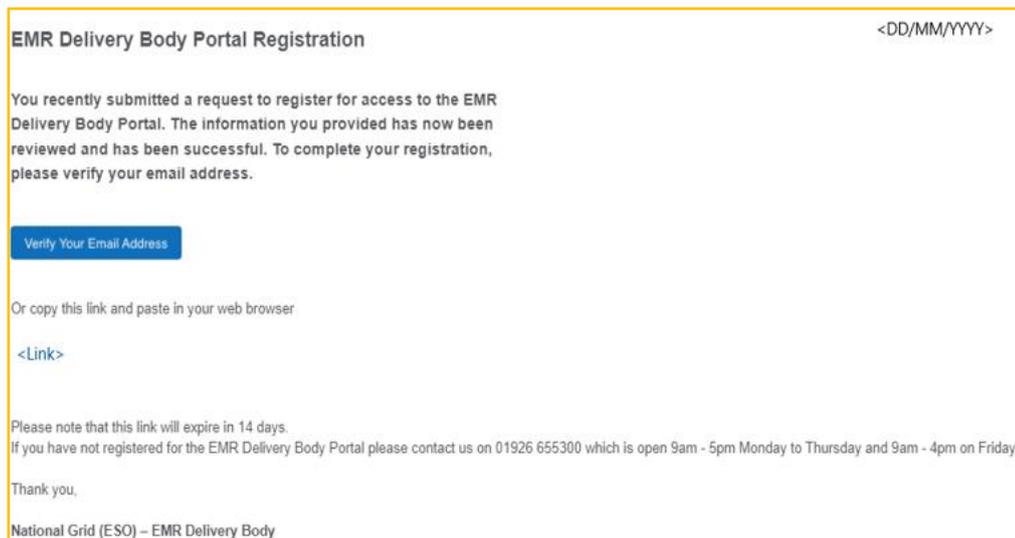
1. Overview

This guidance document aims to provide comprehensive instructions on obtaining User Credentials for EMR Portal access following a successful Company registration. Additionally, it will outline procedures for adding other Users, to help manage the Company Information.

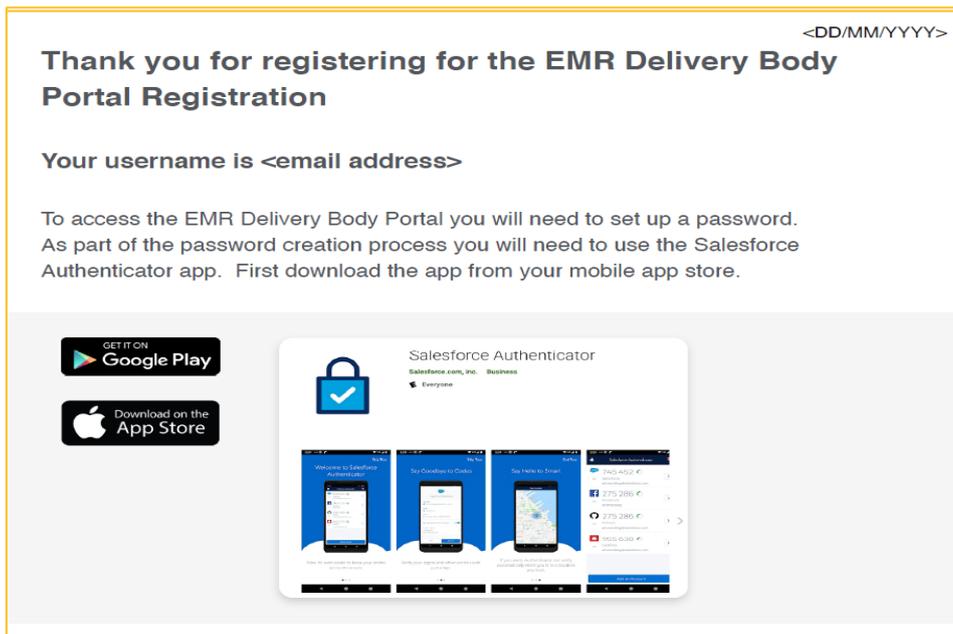
2. How to Register and Manage User(s)

2.1 Logging In

- 2.1.1 Once a Company has successfully been registered in the EMR Portal, the Main Admin User will receive an email inviting them to verify their email address.
- 2.1.2 Click [Verify Your Email Address](#) or paste the link into a browser. A pop-up message will appear confirming that the email address has been verified.



- 2.1.3 The User will receive another email asking them to set up a password for the EMR Portal, with a link to the **Salesforce Authenticator App**. The Salesforce Authenticator app will need to be used, as part of our improved security measures to log into the EMR Portal.
- 2.1.4 On each login to the EMR Portal, a User is required to grant access approval through the Salesforce Authenticator App. A push notification from the app will automatically trigger so please ensure app settings allow notifications.
- 2.1.5 On a mobile device, either click the link in the email for the relevant app store to download the Salesforce Authenticator app or go directly to the App Store. Once the User has successfully installed the Salesforce Authenticator app, they can then create their password, by clicking **Create Your Password** in the email.



When you are ready to set up your password please click the button below.

[Create Your Password](#)

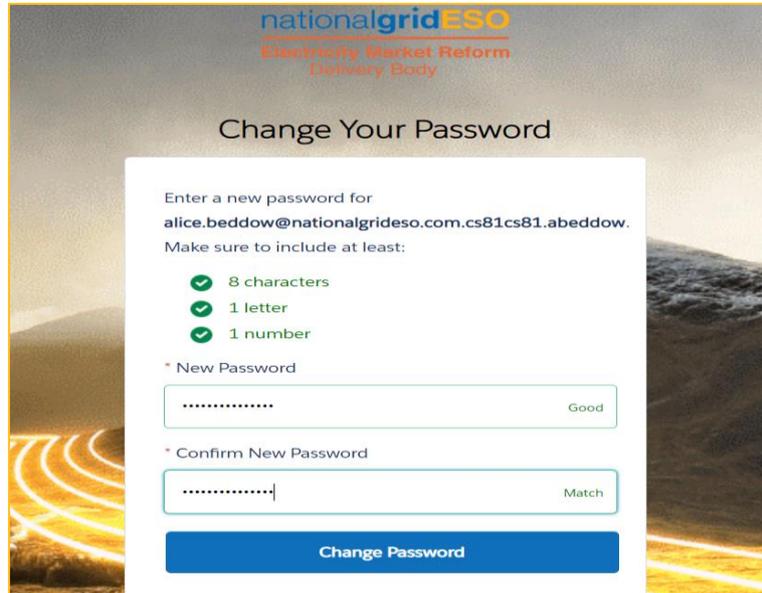
Alternatively, copy this link and paste it in your web browser.

<Link>

Please note this link will expire in 24 hours.

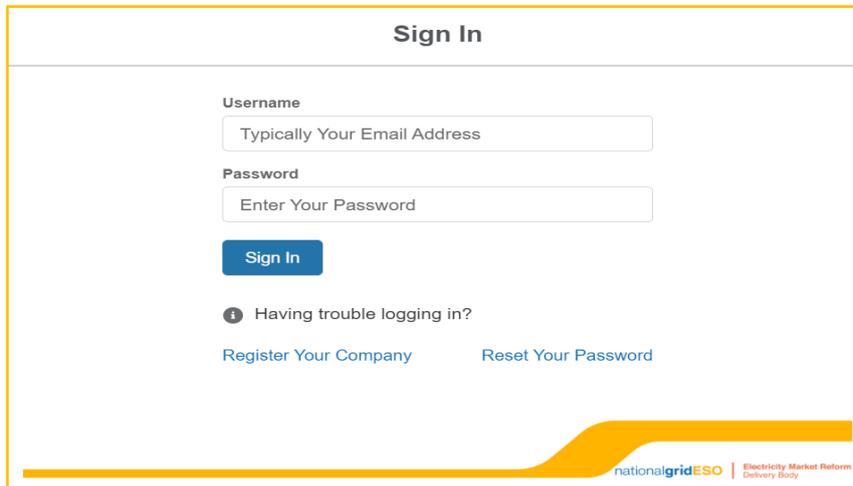
Thanks,

2.1.6 A new browser window should be presented at this stage, facilitating the User in establishing a new password for subsequent access the EMR Portal. Users will be prompted to create a password. Upon successfully creating a password that meets requirements, select **Change Password**.



The screenshot shows a web form titled "Change Your Password" for nationalgridESO. The form prompts the user to enter a new password for the email address "alice.beddow@nationalgrideso.com.cs81cs81.abeddow". It lists requirements: 8 characters, 1 letter, and 1 number, all of which are met. There are two input fields: "New Password" (marked with a "Good" status) and "Confirm New Password" (marked with a "Match" status). A blue "Change Password" button is at the bottom.

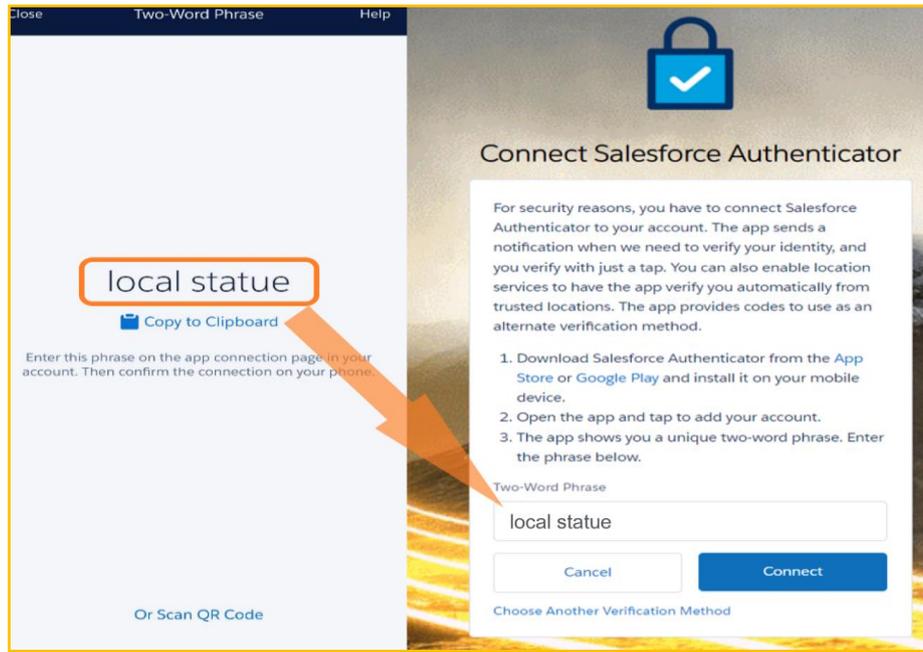
2.1.7 The User will be redirected to the **Sign In** page where they can log in using the username supplied in the successful registration email, and the password they have just created. Once these details are entered click **Sign In**.



The screenshot shows a "Sign In" page with two input fields: "Username" (with a placeholder "Typically Your Email Address") and "Password" (with a placeholder "Enter Your Password"). A blue "Sign In" button is below the fields. Below the button is a link "Having trouble logging in?" and two links: "Register Your Company" and "Reset Your Password". The nationalgridESO logo is at the bottom right.

2.1.8 To complete the sign in, the User will need to connect the Salesforce Authenticator app to their EMR Portal account.

- (a) Open the Salesforce Authenticator app.
- (b) Click Add an Account (located at the bottom of the app screen).
- (c) Enter the words shown in the app under Two-Word Phrase into the text box on the browser screen.
- (d) Click Connect on the browser screen.

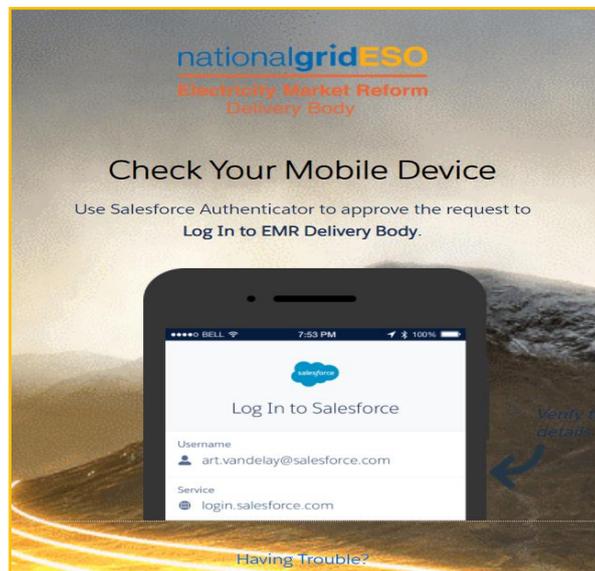


2.1.9 The screen on the Salesforce Authenticator app will change to include the EMR Portal username and the service name (Salesforce).

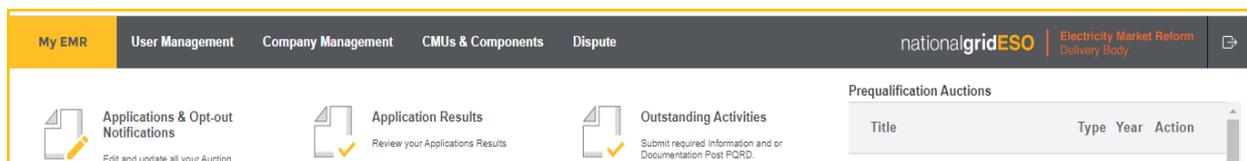
- (a) Click Connect in the Salesforce Authenticator app. The screen on the Salesforce Authenticator app will change again.
- (b) Select Approve in the Salesforce Authenticator app to approve the connection.

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2.1.10 The User will receive a notification on the browser alerting them to check the mobile device. Select **Approve** in the Salesforce Authenticator app to approve the login. When the connection is approved through the Salesforce Authenticator app, the User will also receive an email with a subject line: *A new verification method was added to your EMR Delivery Body account.*



2.1.11 Once successfully logged into the EMR Portal, the User will see the home screen of the EMR Portal. From here, they can navigate to the **User Management** and **Company Management** areas of the EMR Portal.



2.1.12 In case a User changes their mobile phone number after the initial registration, they need to get in touch with the Delivery Body to disconnect the Salesforce Authenticator from their previous number. This will enable them to register their new mobile number. Please send your request to box.EMR.Prequal@nationalgrideso.com. Backing-Up the Salesforce Authenticator App will prevent needing to do this if the User's device changes (as long as this doesn't include a change to the phone number).

3. User Types

3.1.1 There are three User types, and the privileges of each User type can be managed by the Main Admin and Deputy(s).

3.2 Main Admin

3.2.1 **The Main Admin is the first User that will be created as part of the Company Registration process.** After the Main Admin receives their login credentials, they will be responsible for the adding, editing, and removing of other Users within an organisation, and for the creation of additional Companies if required. It is not possible for a Main Admin to modify email addresses or usernames of themselves or other users. They will also act as the main point of contact for any communications from the Delivery Body.

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- 3.2.2 There can only be one Main Admin listed per EMR Portal Account, this means where there are multiple Companies under one Portfolio all of them will share the same Main Admin. It is permissible for the Director of a registered Company or organisation to also be the Main Admin. The Main Admin has Read and Write privileges by default. If a person leaves the Company, it is the responsibility of the Main Admin and Deputy(s) to deactivate them on the EMR Portal.
- 3.2.3 Only Main Admins can access the Bidding Group Management tile. This means the Main Admin can see all Bidding groups, Company(s) within the Bidding groups and Authorised Individuals within the group. However, they can only see their usernames and passwords across all Bidding groups.
- 3.2.4 In the instance that a Main Admin will no longer be acting in this role, they are able to promote another User to Main Admin at which time the original Main Admin will be demoted to a Deputy. This newly promoted Main Admin will then have all the privileges and responsibilities of the Main Admin. The new Main Admin should then review the permissions of the old Main Admin to ensure that these are appropriate.
- 3.2.5 If a Main Admin role needs to be moved to another User but the current Main Admin is unable to action it (for example, they have left the organisation) an active Company Director can request the EMR DB promote a current User to this role by emailing the Prequalification team at box.emr.prequal@nationalgrideso.com.

3.3 Deputy

- 3.3.1 A **Deputy** is the first additional person that the Main Admin will need to register on the EMR Portal. A Main Admin can register one or more Deputies. A Main Admin can choose if the Deputy will have Read and Write privileges or Read only. Where the Main Admin manages multiple Companies, they can assign specific Companies to the Deputy to have access to and manage the Company information depending on the Privileges given to the Deputy.
- 3.3.2 A Deputy with Read and Write privileges; can edit the Company information, create additional Companies, create and amend CMU(s) and Component(s) and register other Deputies or Users. They can also deactivate other Deputies or Users, however they can only view the Main Admin details. They also serve as the principal point of contact for all communication with the Delivery Body.

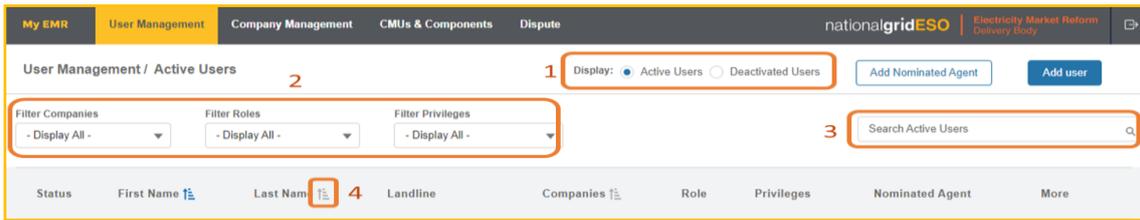
3.4 User

- 3.4.1 A Main Admin or Deputy can create a **User** on the EMR Portal to carry out specific tasks. This User can act on behalf of a main Company or additional Companies where they have been assigned the relevant privileges.
- 3.4.2 A Main Admin or Deputy can create a User as a **Nominated Agent** and this Nominated Agent User can manage the Company, CMU(s) and Component(s) information; dependent on the privileges given to them as well as the Company(s) assigned to them.
- 3.4.3 A User with Read Only privileges: can only view information for the Company, CMU(s) and Component(s) and other Users they are related to in the system.
- 3.4.4 A User with Read and Write privileges: can, create and amend CMU(s) and Component(s) they are related to in the system. However, they cannot edit Company Details and the User details for any other User.

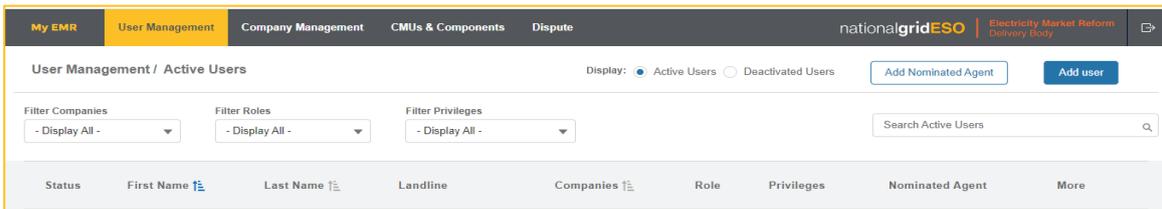
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4. Adding a New User

- 4.1.1 The User Management page contains options to make the search and management of Users easy.
- 4.1.2 Display toggle: Switch between the lists of Active Users and Deactivated Users. Active Users view is the default.
- 4.1.3 Filters: Filter the list of Users by the Company(s) that Users are related to, their Role and EMR Portal privileges.
- 4.1.4 Search Active Users: Search a list by a User's first or last name.
- 4.1.5 Sort function: Sort the data alphabetically for qualitative values (e.g. First Name or Last Name) and Low to High / High to Low for numeric values (e.g. Companies).



- 4.1.6 To create a new User, navigate to the **User Management** tab on the EMR Portal home screen. Click **Add user** in the top right of the screen.



- 4.1.7 This will open a new screen where the User details can be entered.

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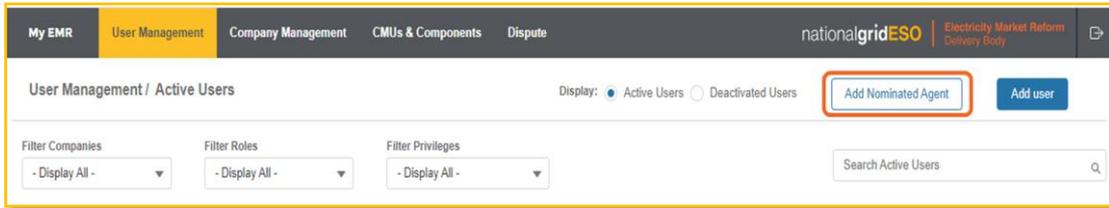
- 4.1.8 Select the **Role** (Main Admin, Deputy, or User) of the new User from the drop-down menu.
- 4.1.9 From the **Privileges** drop-down menu, select the new User's level of access to the EMR Portal (Read Only, or Read and Write).
- 4.1.10 Select the **Primary Company** they will be associated with, and any other Additional Companies they should have access to (if applicable).
- 4.1.11 Click **Save & Close**.

User First Name	Stuart	Role	Deputy
User Last Name	Smith	Privileges	Read & Write
Email	stuart.smith@bloggslimited.com	Primary Company	Bob Smith Limited
Confirm Email	stuart.smith@bloggslimited.com	Assign Additional Companies	0
Contact Mobile Number	United Kingdom 44 0000000000	Authorised Individual	<input checked="" type="checkbox"/>
Contact Landline Number	United Kingdom 44 0000000000		
<input type="button" value="Save & Close"/>			

- 4.1.12 The new User will now receive an email inviting them to verify their email address and should follow the [Logging in](#) process.

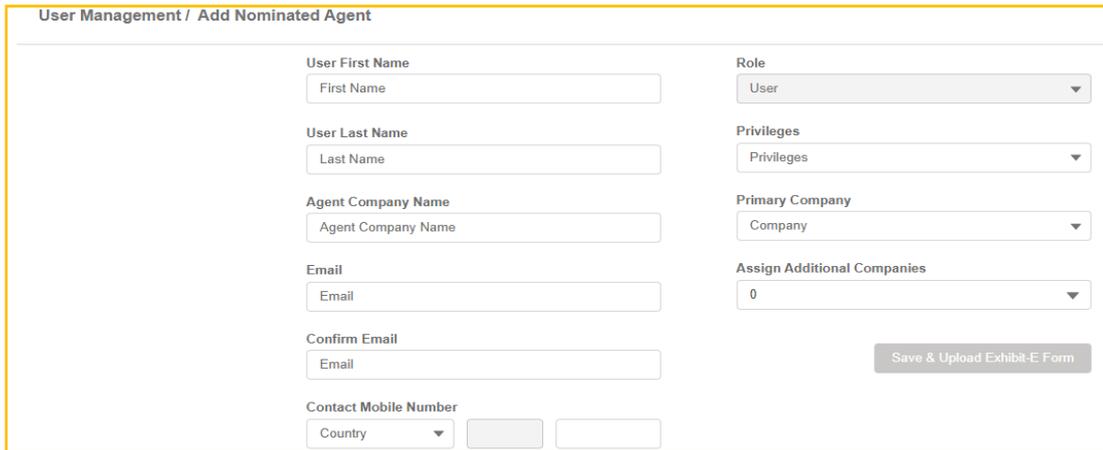
5. Nominated Agent

5.1.1 To add a Nominated Agent, navigate to the User Management tab. Click **Add Nominated Agent** in the top right of the screen. This will open a new screen that will allow you to fill in the Nominated Agent details.



5.1.2 Only the Main Admin or Deputy(s) with Read and Write privileges can nominate an Agent.

5.1.3 The system defaults the Role of an Agent to that of a User, however the privileges the Agent will have can still be selected. Select the Primary Company they will be associated with, and any other Additional Companies they should have access to (if applicable). Save and upload the completed up to date **Agent Nomination Form (Exhibit E)**.

A screenshot of the 'User Management / Add Nominated Agent' form. The form is titled 'User Management / Add Nominated Agent'. It contains several input fields and dropdown menus. On the left side, there are fields for 'User First Name' (with a placeholder 'First Name'), 'User Last Name' (with a placeholder 'Last Name'), 'Agent Company Name' (with a placeholder 'Agent Company Name'), 'Email' (with a placeholder 'Email'), 'Confirm Email' (with a placeholder 'Email'), and 'Contact Mobile Number' (with a 'Country' dropdown and two empty input boxes). On the right side, there are dropdown menus for 'Role' (set to 'User'), 'Privileges' (set to 'Privileges'), 'Primary Company' (set to 'Company'), and 'Assign Additional Companies' (set to '0'). A 'Save & Upload Exhibit-E Form' button is located at the bottom right of the form.

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6. Changing a User's Access

- 6.1.1 To edit a User's data and/or permissions, or to deactivate them: navigate to the User Management tab and search for the User that you need to amend in the list.
- 6.1.2 Only Users with Read and Write privileges whose role is a Main Admin or Deputy can make edits to the User details.
- 6.1.3 Click on the three vertical dots on the right-hand side of the User's name. A new screen will appear where attributes such as **First Name**, **Last Name**, **Contact Telephone Numbers**, **Role**, **Privileges**, **Primary Company** and **Assign Additional Companies** can be amended.



User Management / Edit John Smith

User First Name	<input type="text" value="John"/>	Role	<input type="text" value="Deputy"/>
User Last Name	<input type="text" value="Smith"/>	Privileges	<input type="text" value="Read & Write"/>
User Name	<input type="text" value="john...smith000@123outlook.com.cs122cs122.jsmith"/>	Primary Company	<input type="text" value="DISPUTE DATA LTD"/>
Email	<input type="text" value="john...smith000@123outlook.com"/>	Assign Additional Companies	<input type="text" value="1"/>
Contact Mobile Number	<input type="text" value="United Kingdom"/> <input type="text" value="44"/> <input type="text" value="1234567891"/>	Active User	<input checked="" type="checkbox"/>
Contact Landline Number	<input type="text" value="United Kingdom"/> <input type="text" value="44"/> <input type="text" value="1234567891"/>		<input type="button" value="Save & Close"/>

- 6.1.4 The **Active User** toggle controls whether the User is active or de-active. When a toggle is grey, it means the User is inactive, and does not have access to the EMR Portal. A blue toggle with a white checkmark means the User is active and can access the EMR Portal, and depending on their privileges can make edits on the EMR Portal.



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