

# EMR Delivery Body New Portal Webinar

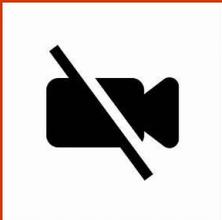
18 Jan 2024



# House Keeping



Microphones on mute



Cameras off



This webinar will be recorded

*UPDATE : 22/01/2024 Please webinar recording on separate upload*

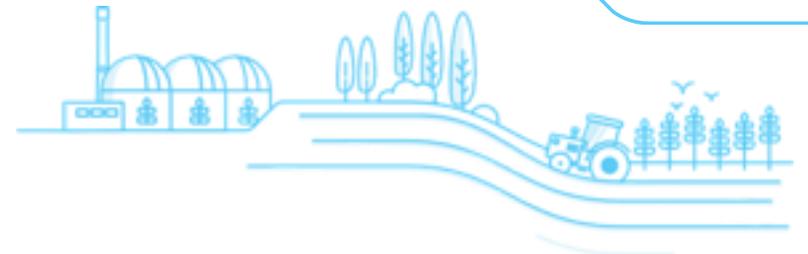
Got a question?

We will be using Sli.do for questions and feedback in today's session. Please go to [sli.do](https://sli.do) and enter the event code **#2282751**.



# Agenda

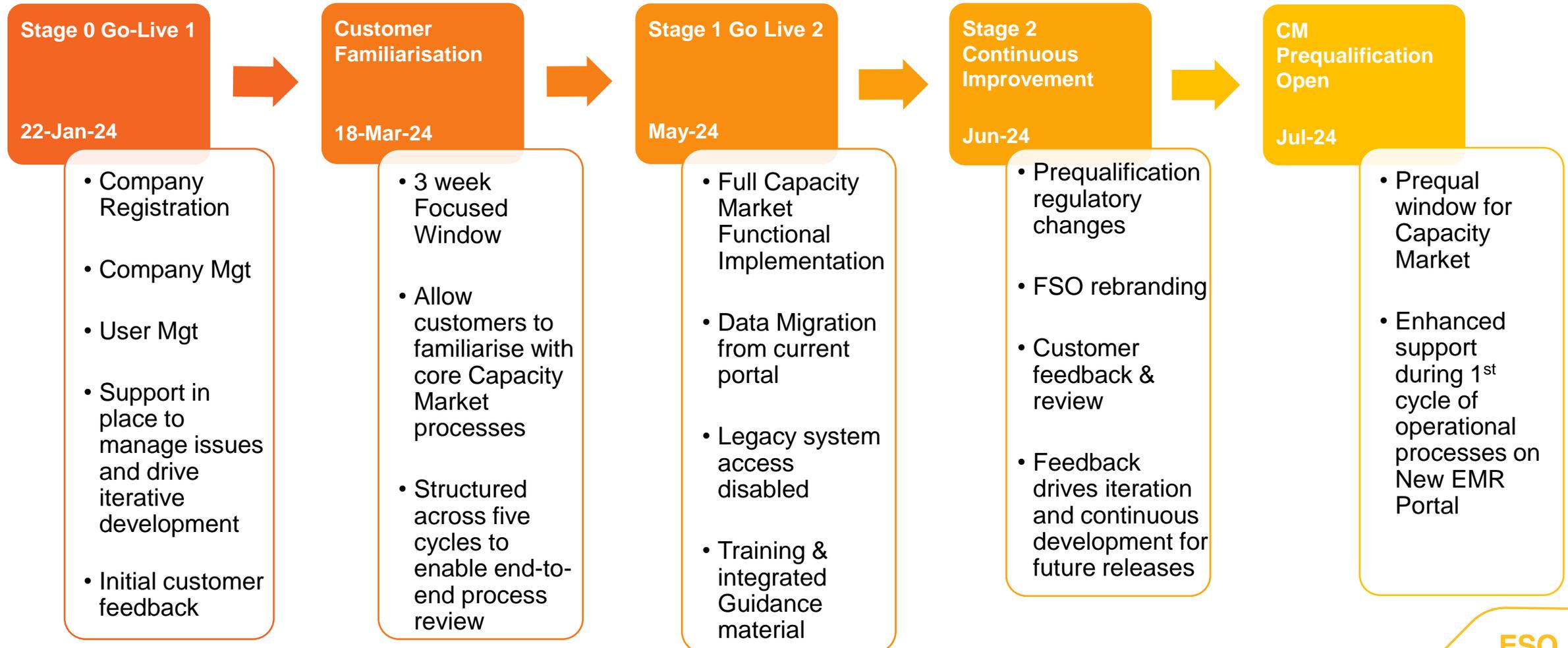
- **Go Live timsecales**
- **Summary of functionality**
- **What do you need to know – Company Portfolios**
- **Details registered in New Portal 2022**
- **Available Support**
- **LIVE Demonstration**
- **Questions & Answers**
- **Familiarisation Window**
- **Feedback & Close**



# EMR Delivery Body New Portal – Go Live 1

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- Go Live 1 represents the first step in the overall implementation delivery plan for the New EMR Delivery Body Portal
- Customers will be able to register their companies and users prior to the planned full CM implementation in May
- Where information remains accurate companies that were already registered previously in 2022 have been retained



# Summary of functionality

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- Limited Companies, PLCs and LLPs benefit from Companies House Integration.
- The Portal will locate Company information and import in to the Portal based on registration number.
- Company updates can be made within the Portal.
- Organisations not registered to Companies House are still subject to approval from the Delivery Body.

## Companies House Integration



- Two Step Authentication is now incorporated.
- Salesforce Authenticator App for mobile is required<sup>1</sup>.
- Used to Authenticate a User Account when registering.
- Also used for each log in attempt.

## Extra Layer of Security



- Email address used as Username.
- Registering User becomes the Main Admin by default.
- One Main Admin at any given time.
- Add new Users – User profiles can be either **Deputy** or **User**.
- Set new Users access privileges.

## User Management



- Registering your first Company creates an EMR Portfolio.
- Utilising Single Sign on Approach add and manage all businesses<sup>2</sup>.
- Main Admins and Deputies can register additional companies within a Portfolio.
- Assign User's access to one or more businesses from a Portfolio.

## Portfolio Management



1. We are actively reviewing options to deliver changes to this based on Customer Feedback.
2. We are exploring options to enable Users to have access to multiple Portfolios via a single set of login credentials.

# What do you need to know? – Company Portfolios Sli.do #2282751



Main Admin

## EMR Portfolio

### Company 1



A1



A2



U1



U2



A1



A3



U1



U2

### Company 3



A1



A2



U1



U3



Main Admin



Deputy



User

- Main Admin sets up an account with Company 1
- Under Company 1 the Main Admin sets up two Deputies A1 and A2
- Main Admin or Deputies create Users U1 and U2
  
- The Main Admin or Deputies add Company 2 to the Portfolio
- Deputies and Users can be added to this Company
- Note Deputy A3 is only registered to access Company 2
  
- Main Admin or Deputy registers Company 3
- Deputy A1 and A2 are given access to this Company
- User U1 and U3 are set up to access Company 3
  
- Deputies can be promoted to Main Admin allowing access to all Companies within Portfolio
- The Main Admin who has been replaced becomes a Deputy
- When a Deputy or User leaves the Company the Main Admin or Deputies can remove their access.

Company 1 Data Set

Company 2 Data Set

Company 3 Data Set

# Details registered in New Portal 2022

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**No Change**  
Main Admin details and company details have remained the same

- Main Admin will be reactivated.
- Main Admin can activate Deputy and/or other users or leave as disabled.
- Main Admin or Deputies can also add new users and companies as appropriate.

**Company Name Change**

- Main Admin will be reactivated. As above for user activation.
- Company name can be updated by clicking 'Refresh Company Details' for Limited Companies as per 'Company Name and Address Change' Guidance.

**Main Admin details are different**

- Where it has not been possible to verify and match Main Admin details originally set up in New Portal, customers have been contacted to confirm the deletion of associated companies in New Portal.

**No companies registered in New Portal**

- If you previously did not register in New Portal, you will be able to register companies and associated users from the Go Live 1
- Please follow Customer Guidance and tutorial videos for further support.

**IMPORTANT – All reactivated Main Admins and ANY re-activated users will need to use the "Reset Your Password" button.**

**Remaining aligned in both Current Portal and New Portal**

Once Main admin details have been registered or reactivated in New Portal, it is important the Main Admin details and associated Company Name remain the same as held in current portal in order for the data migration to take place.

# Available Support

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Customer Guidance – All guidance material and tutorial videos can be found under ‘Support documentation’ on the EMR Delivery Body Portal through the ESO website.

[Link here](#)

## Guidance Available:

- Company Registration,
- Company Management,
- Company Name and Address Change,
- User Registration and Management

Queries – For further support, please get in touch with the **Prequalification Team**



Email: [box.emr.prequal@nationalgrideso.com](mailto:box.emr.prequal@nationalgrideso.com)



Phone: 01926 655 300 Option 1

A sunset over a field with green light trails. The sun is low on the horizon, casting a warm glow. The field is green, and there are trees in the background. Several bright green light trails curve across the field, suggesting a long-exposure photograph of a moving light source.

*UPDATE : 22/01/2024 Please find  
live demonstration on separate  
webinar recording.*

# Demonstration

Emily will now take us through a functional demonstration of  
Company Registration and User Management

# Questions & Feedback

Got a question?

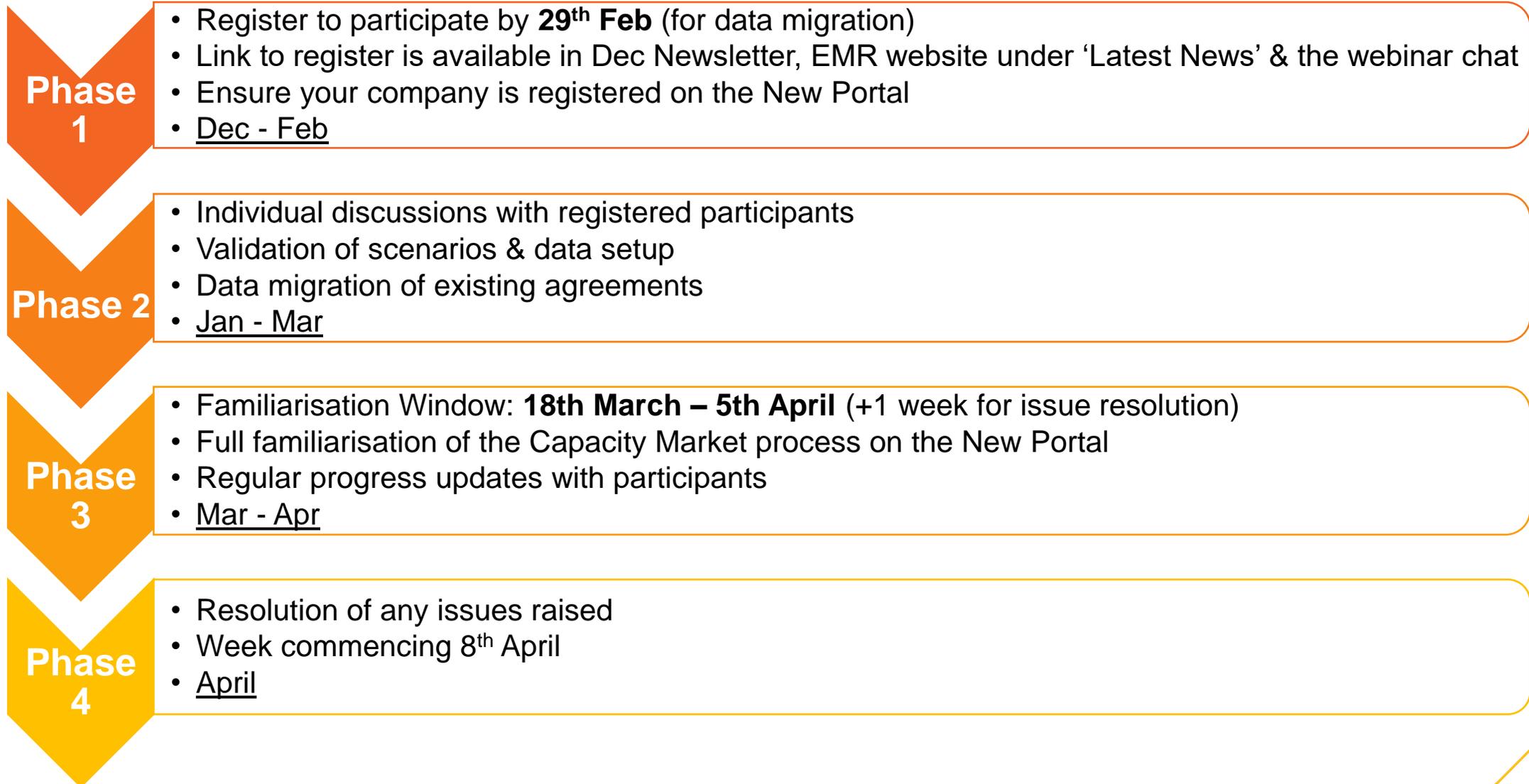
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*UPDATE : 22/01/2024 Please find a consolidated output of the Q&A section on separate document.*

# EMR DB New Portal – Customer Familiarisation Window Sli.do #2282751

The EMR Delivery Body is offering customers the unique opportunity to take part in familiarisation of New Portal functionality.



# EMR DB New Portal – Customer Familiarisation Window

Day	March										April				
	WK 1					WK 2					WK 3				
	18	19	20	21	22	25	26	27	28	29	1	2	3	4	5
Cycle 1	CMU Creation & PQ Submission		PQ Assessment & Results	Disputes / Pre-Auction Activities	Disputes Results / Pre-Auction Activities	Pre-Auction Activities / Confirmation Of Entry	Auction Results (T-1/T-4) & CANs	AM Activities / Secondary Trading		Bank Holiday	Bank Holiday	AM Activities / Secondary Trading			
Cycle 2	CMU Creation & PQ Submission			PQ Assessment & Results	Disputes / Pre-Auction Activities	Disputes Results / Pre-Auction Activities	Pre-Auction Activities / Confirmation Of Entry	Auction Results (T-1/T-4) & CANs	AM Activities / Secondary Trading						
Cycle 3					CMU Creation & PQ Submission	CMU Creation & PQ Submission	PQ Assessment & Results	Disputes / Pre-Auction Activities	Disputes Results / Pre-Auction Activities			Pre-Auction Activities / Confirmation Of Entry	Auction Results (T-1/T-4) & CANs	AM Activities / Secondary Trading	
Cycle 4	PQ Application Submissions														
Cycle 5	AM Activities Familiarisation (For Users With Existing Agreements)														

We intend to run 5 Cycles during the Familiarisation Window:

- **Cycles 1-3:** full journey through CM process available to any users
- **Cycle 4:** familiarisation with Prequalification application submissions available to any users
- **Cycle 5:** familiarisation with Agreement Management activities only available to users with existing agreements

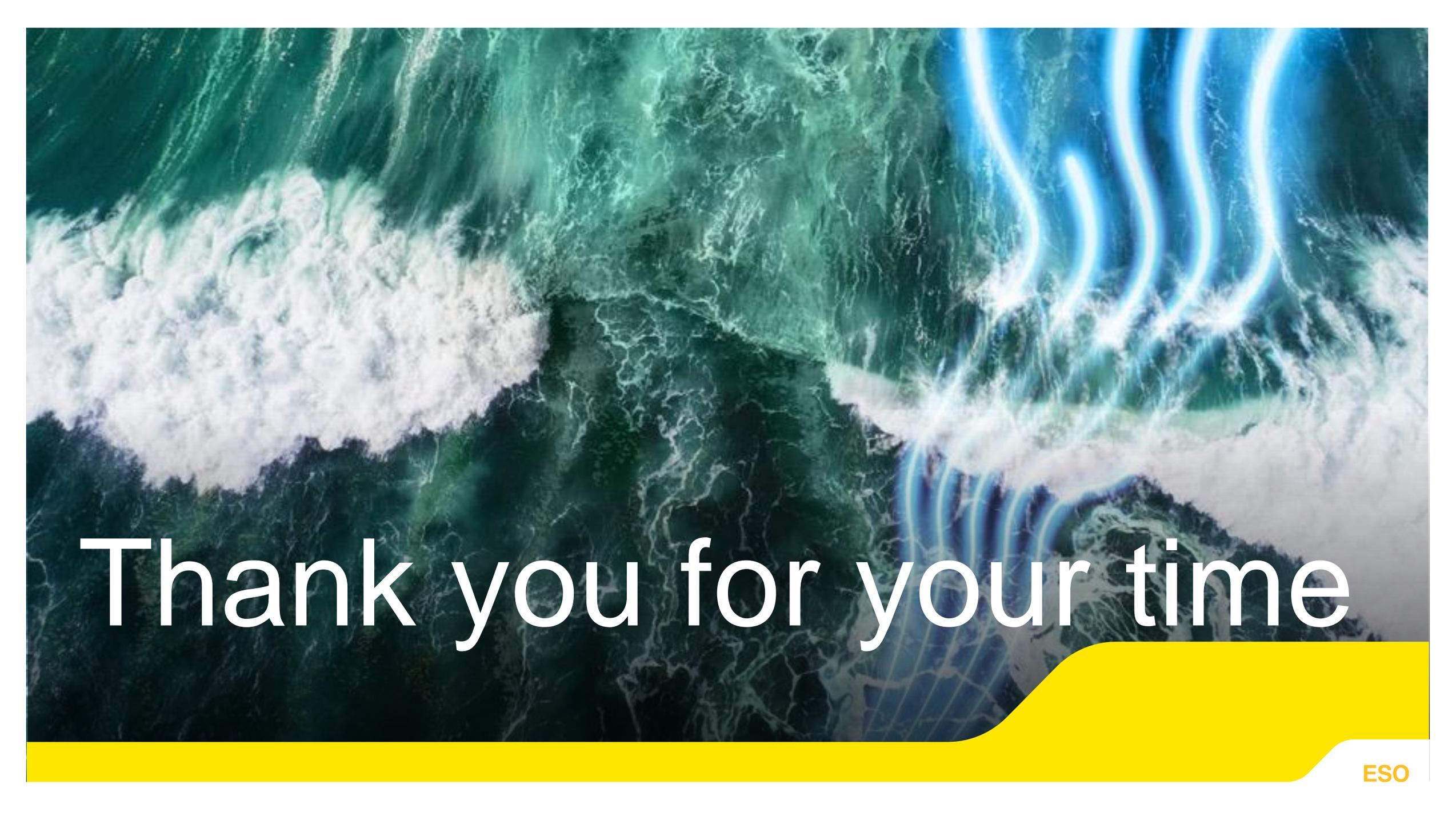
To register:



Cycles 4 & 5 will be open throughout the FW, while Cycles 1-3 will open and close to users at a certain date/time.

Depending on your situation, certain activities will require data setup to make them available during the Window.

For any queries or comments related to the Familiarisation Window, please contact: [box.NewEMR.ITteam@nationalgrid.com](mailto:box.NewEMR.ITteam@nationalgrid.com)

An aerial photograph of a river with white water rapids. The water is a mix of dark green and white foam. Several bright blue lightning bolts are striking the water, creating a dramatic effect. The text "Thank you for your time" is overlaid in white on the lower half of the image.

Thank you for your time