

Capacity Auction Bidding Company and Authorised Individual Management Guidelines



**Bidding Company and Authorised
Individual Management Guidelines**

October 2016

Executive Summary

This user support guide will help participants who have qualified to take part in the Capacity Market Auction to manage their Bidding Companies and Authorised Individuals (AIs). Each participant needs to have a Bidding Company and associated AIs to participate in the auction and to place bids.

A Bidding Company will be automatically created in EMR Portal for each participant who has been pre-qualified or conditionally pre-qualified for the relevant auctions. This will be created at sub company level. If the participant only has one company, the Bidding Company will be at the main company level. "Main Admin users" of the main/sub company will be the default AI(s) for the system created Bidding Companies.

Bidding Companies are available immediately after the release of prequalification results.

A participant does not need to do anything if they do not want to make any changes to the system generated Bidding Company and/or associated AIs. Otherwise this guide can be used to manage Bidding Companies and to distribute CMUs between these Bidding Companies. This guide will also help you to create and add additional AIs to the Bidding Companies.

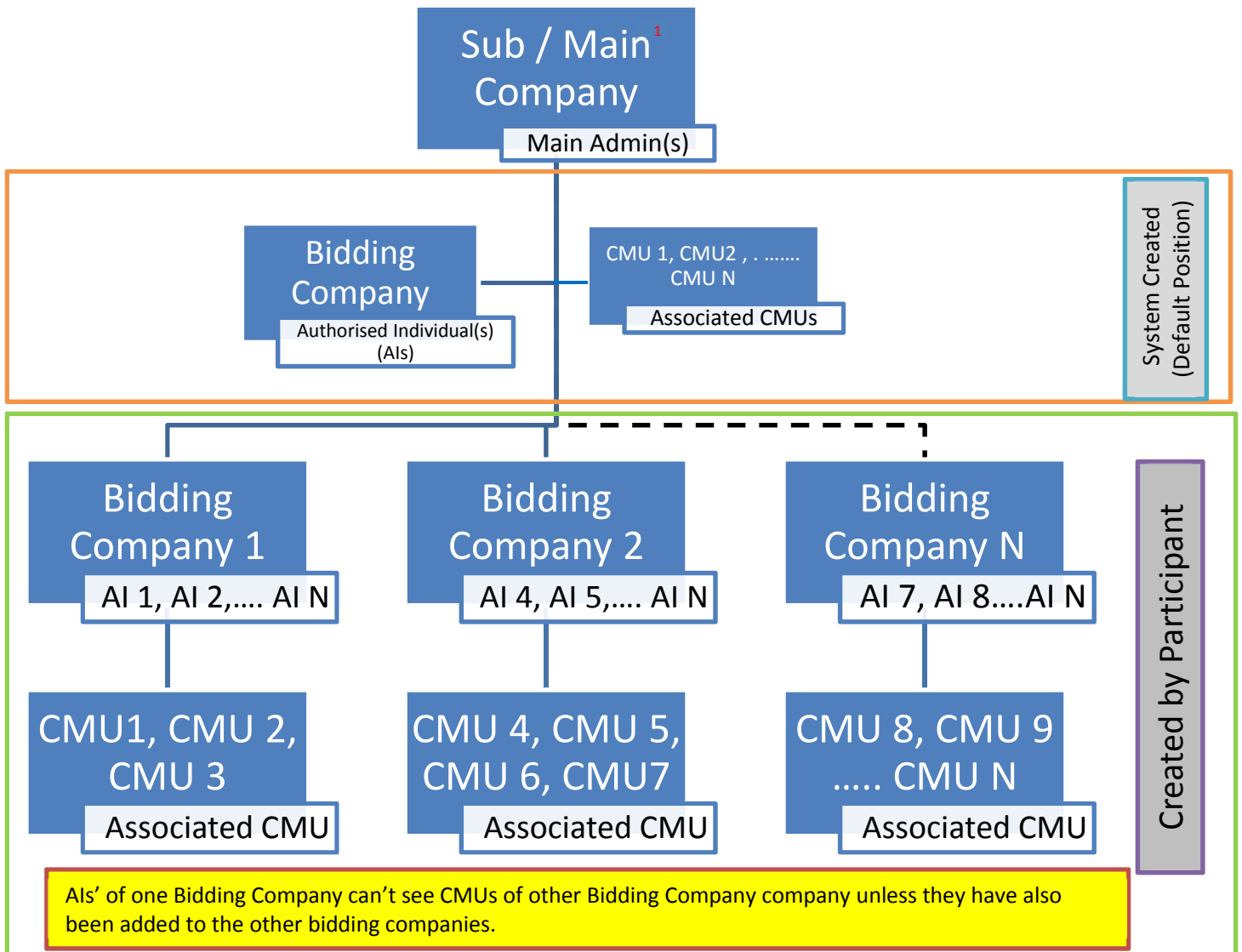
Important points to note:-

1. If a participant does not do anything, there will be one Bidding Company for each sub company (or main company if that is the only company) created by the system with the associated "main admin(s)" as the AI(s).
2. Any changes to a Bidding Company or AI(s) must be carried out before 17:00 on the day falling 10 working days prior to the commencement of the first Bidding Window.
3. These activities need to be carried for each auction separately.
4. AIs assigned to a Bidding Company will not have access to the CMUs of any of the other Bidding Companies created under the sub/main company unless they have also been added to the the other bidding companies

Please refer to the below diagram for link between Bidding Companies, AIs and Main Company.

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¹ A Bidding Company will be created at sub company level (or at main company level if that is the only company)

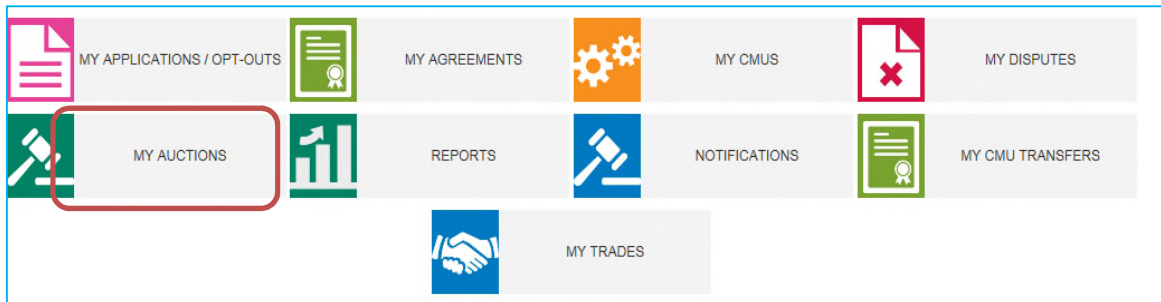
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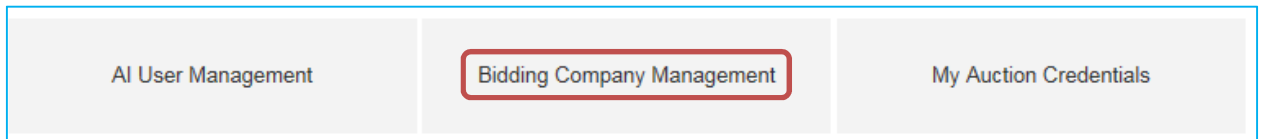
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1. Accessing Bidding Companies

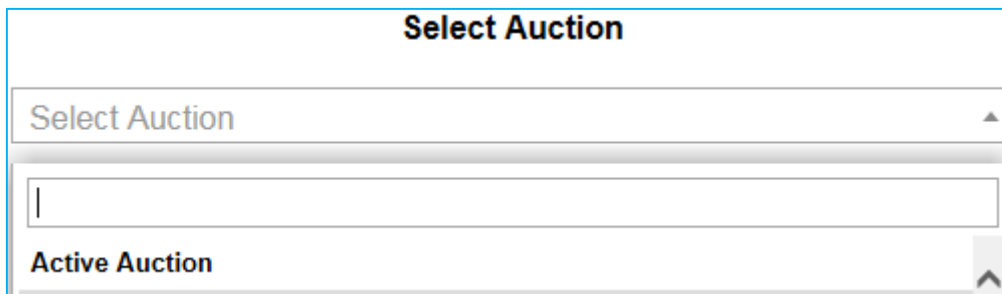
- 1.1 Login into the EMR Delivery Body portal (www.emrdeliverybody.com)
- 1.2 Click on tab “My Auctions” as below under “My EMR”.



- 1.3 Click on tab “Bidding Company Management”



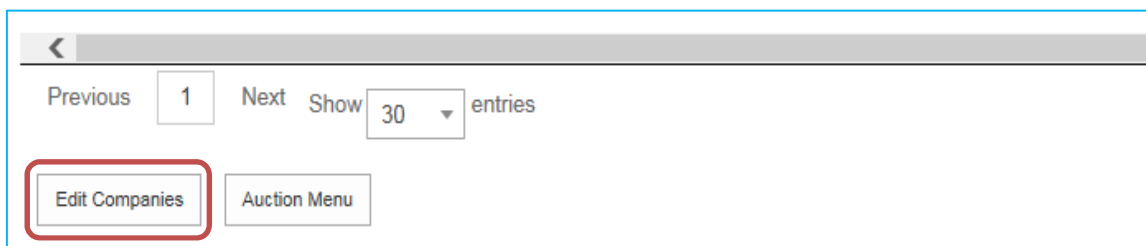
- 1.4 Select the relevant auction from the drop down list.



You will see the list of bidding companies that have been automatically created (only if you have been prequalified or conditionally prequalified for the selected auction.)

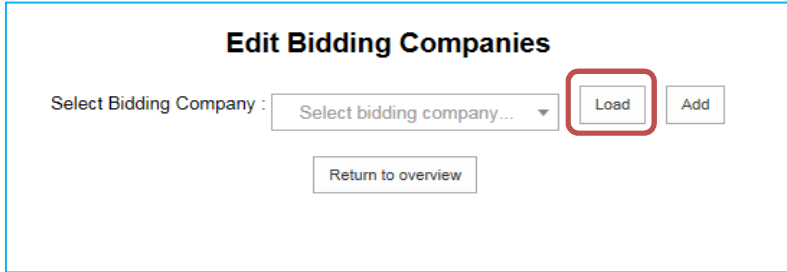
2. Updating Bidding Companies

- 2.1 To edit an existing Bidding Company, access the Bidding Company Management page as per Step 1. Then click “Edit Companies” at the bottom of the page.



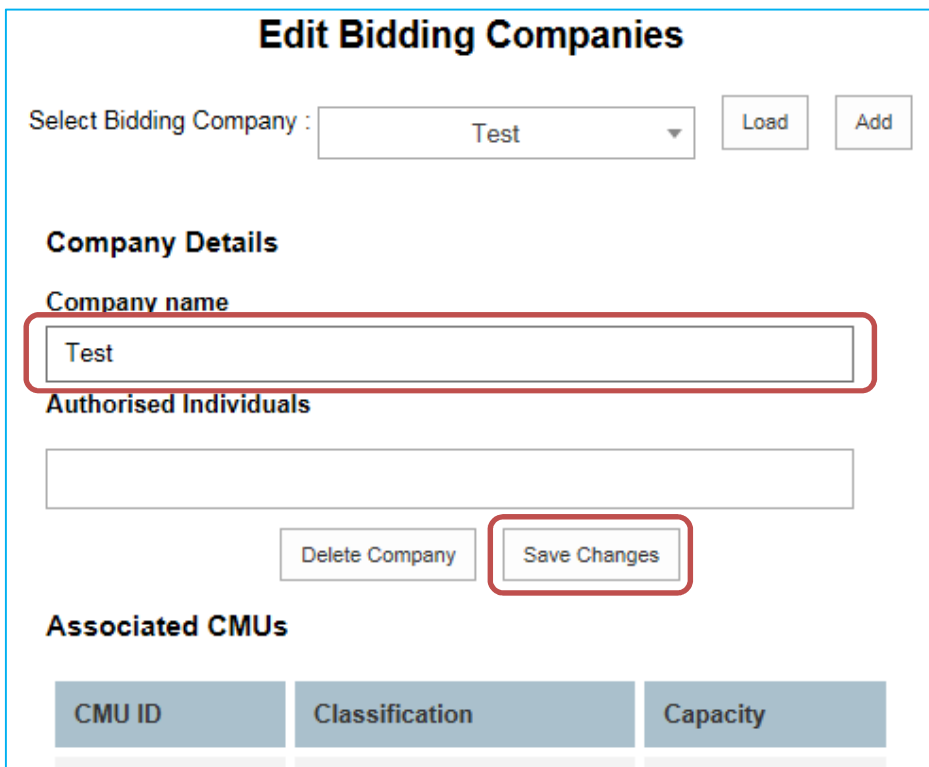
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- 2.2 Select the Bidding Company from the drop down list and click load. The system will then display the company name, associated Authorised Individuals and a list of CMUs assigned to that group as shown in step 2.3 below.



The screenshot shows the 'Edit Bidding Companies' interface. At the top, there is a dropdown menu labeled 'Select Bidding Company' with the text 'Select bidding company...' and a downward arrow. To the right of the dropdown are two buttons: 'Load' and 'Add'. The 'Load' button is highlighted with a red rectangular box. Below the dropdown and buttons is a 'Return to overview' button.

- 2.3 To change the Company Name, type the new name in the field for "Company Name" and then click "Save Changes".



The screenshot shows the 'Edit Bidding Companies' interface. At the top, there is a dropdown menu labeled 'Select Bidding Company' with the text 'Test' and a downward arrow. To the right of the dropdown are two buttons: 'Load' and 'Add'. Below the dropdown and buttons is a 'Return to overview' button. The 'Company Details' section is visible, with a 'Company name' field containing the text 'Test'. The 'Authorised Individuals' section is also visible, with a blank text box. Below the text box are two buttons: 'Delete Company' and 'Save Changes'. The 'Save Changes' button is highlighted with a red rectangular box. The 'Associated CMUs' section is visible, with a table header containing 'CMU ID', 'Classification', and 'Capacity'.

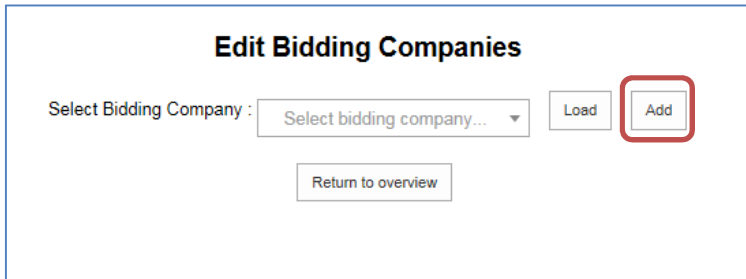
- 2.4 To update the Authorised Individuals, Click on the blank box and you will see the list of all authorised individual to choose from



The screenshot shows the 'Authorised Individuals' dropdown menu. The dropdown is open, showing a list of individuals: 'Tester one' and 'Tester Two'. The dropdown menu is highlighted with a red rectangular box.

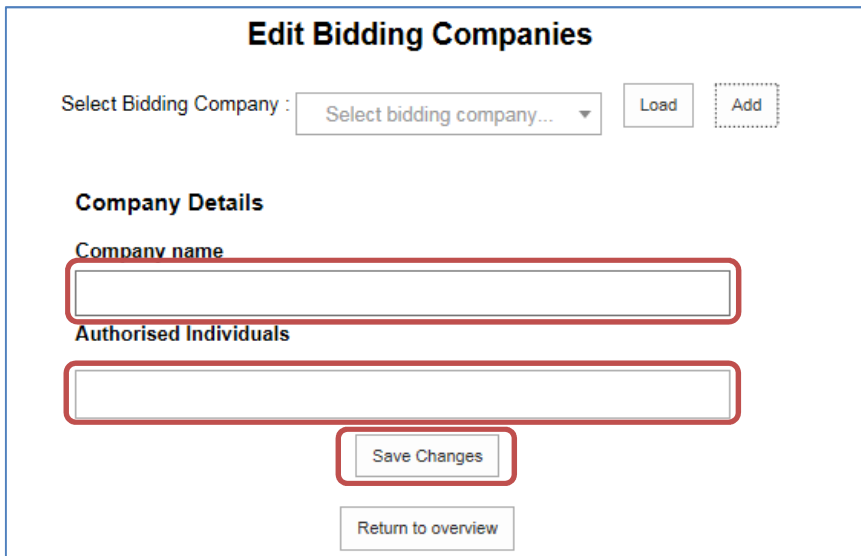
3. Adding a new Bidding Company

3.1 Repeat the steps from 1 to 2.1 then click the “Add” button



The screenshot shows the 'Edit Bidding Companies' interface. At the top, there is a title 'Edit Bidding Companies'. Below it, there is a label 'Select Bidding Company :'. To the right of this label is a dropdown menu with the text 'Select bidding company...' and a downward arrow. To the right of the dropdown are two buttons: 'Load' and 'Add'. The 'Add' button is highlighted with a red rectangular box. Below these elements is a 'Return to overview' button.

3.2 Complete the “Company name” and then click on the box next to the “Authorised Individuals” field and it will list all the individuals associated with the main company. Once complete click “Save Changes”.



The screenshot shows the 'Edit Bidding Companies' interface. At the top, there is a title 'Edit Bidding Companies'. Below it, there is a label 'Select Bidding Company :'. To the right of this label is a dropdown menu with the text 'Select bidding company...' and a downward arrow. To the right of the dropdown are two buttons: 'Load' and 'Add'. The 'Add' button is highlighted with a red rectangular box. Below these elements is a 'Return to overview' button. The main form area is titled 'Company Details'. Under this title, there is a label 'Company name' followed by a text input field. Below this is a label 'Authorised Individuals' followed by a larger text input field. At the bottom of the form area, there is a 'Save Changes' button highlighted with a red rectangular box, and a 'Return to overview' button below it.

4. Adding CMUs to a new Bidding Company

4.1 CMUs can be distributed between Bidding Companies as desired. Select the relevant auction as per step 1. This will provide a list of all the CMUs and options to update the bidding company as shown below. Once you have selected the new bidding company for each CMU you wish to change, click the “save changes” button.

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CMU ID	Classification	Capacity	Company	Bidding Company Name
CMU 1	Non CMRS	XXX MW	Sub Company 1	Bidding Company 1
CMU 2	Non CMRS	XXX MW	Sub Company 1	Bidding Company 1
CMU 3	CMRS	XXX MW	Sub Company 1	Bidding Company 1

Previous 1 Next Show 30 entries Showing 1 to 3 of 3 entries

Edit Companies Auction Menu Save Changes

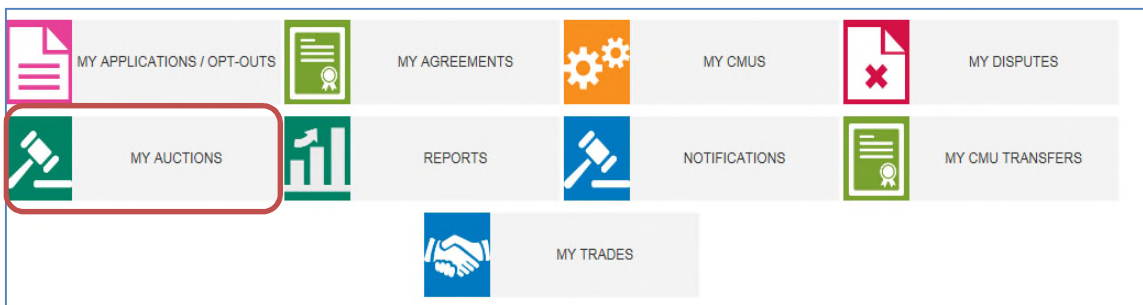
CMU ID	Classification	Capacity	Company	Bidding Company Name
CMU 4	CMRS	XXX MW	Sub Company 2	Bidding Company 2
CMU 5	CMRS	XXX MW	Sub Company 2	Bidding Company 2

Previous 1 Next Show 30 entries Showing 1 to 3 of 3 entries

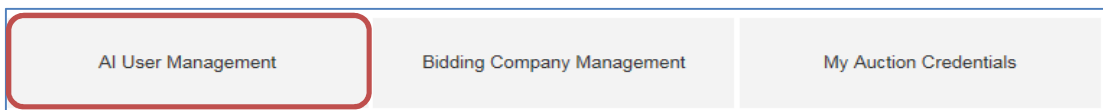
Edit Companies Auction Menu Save Changes

5. Creating a new Authorised Individual

5.1 To create a new Authorised Individual (AI), click on “My Auction” tab in “My EMR” section



5.2 Click “AI User Management”. This will provide you the list of all the existing authorised individuals.



5.3 To add new AI user, click “New AI User” at the bottom of the page.

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Previous 1 Next Show 20 entries

New AI User Return to My Auction

5.4 This will provide you an option to select from existing CM User or create new AI.

Create new Authorised Individual

Do you want to create new AI user using User Management, or do you want to select from existing user?

Create New AI Select from existing CM user Cancel

5.5 Selecting from existing CM user provide list of existing user to add as AI. Select the user from the list and click “Create New AI”.

Create authorised individual from existing CM user

Select user

Create New AI Cancel

5.6 To create a new, click “Create New AI” and complete all fields then click “Submit”.

User management

Team* CM

First Name* Last Name*

Email address* Confirm email address*

Country* United Kingdom Country code* 44

Mobile number* Confirm mobile number*

Landline number*

Role* User

Authorised Individual

Agent

Privileges Operator
Approver
Viewer

Status Active

* Required field

Cancel Submit

The new user will receive an email to complete the registration process. Please refer to the [user guide](#) for help in this.

6. Contact Details

In the event you have any questions regarding Bidding Company management, please contact the Capacity Market Team :-

Telephone:- 01926 655 300

Email:- emr@nationalgrid.com