



# **New EMR Delivery Body Portal: Company Registration / Company and User Management Guidance**



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# 1. Introduction

Any company or organisation that wishes to participate in the Capacity Market (CM) must first register in the New EMR Delivery Body (DB) Portal. This ensures that an Application to participate in the CM Auctions is being made with the consent of a Director or Partner from that organisation and embeds a level of governance around the process to prevent unauthorised Applications.

A person of authority may nominate a person(s) to act as a Main Administrator (Main Admin) on their behalf, to carry out the necessary activities for their Application/Prequalification. A Main Admin can subsequently assign additional Users to assist in this process and to receive notifications.

The aim of this guide is to:

1. Explain the information required to submit a Company Registration.
2. Provide information on how to submit a Company Registration in the New EMR DB Portal.

# Overview of information required for EMR Company Registration

The following information is required to complete an EMR Company Registration form:

- Company/Organisation details: The relevant details for the company or organisation wishing to register, including company name, registered address and company registration number (if applicable).
- Director details: An active Company Director or Company Secretary as registered with Companies House for UK registered companies (or an equivalent body for non-UK registered companies).
- For UK companies not registered on Companies House (such as an LLP), or in the case of a body other than a company where there is not a director, an officer of that body including any authorised signatory will be accepted.



# New EMR DB Portal System Requirements



**Recommended**  
PC Operating System:  
**Microsoft Windows**  
Windows 10 and later

**Recommended**  
Internet Browsers:  
**Apple Safari**  
**Microsoft Edge**  
**Google Chrome**  
**Mozilla Firefox**



If multiple file uploads  
are required:

**Please compile files  
into a single PDF**

**Maximum** file size for  
uploads:

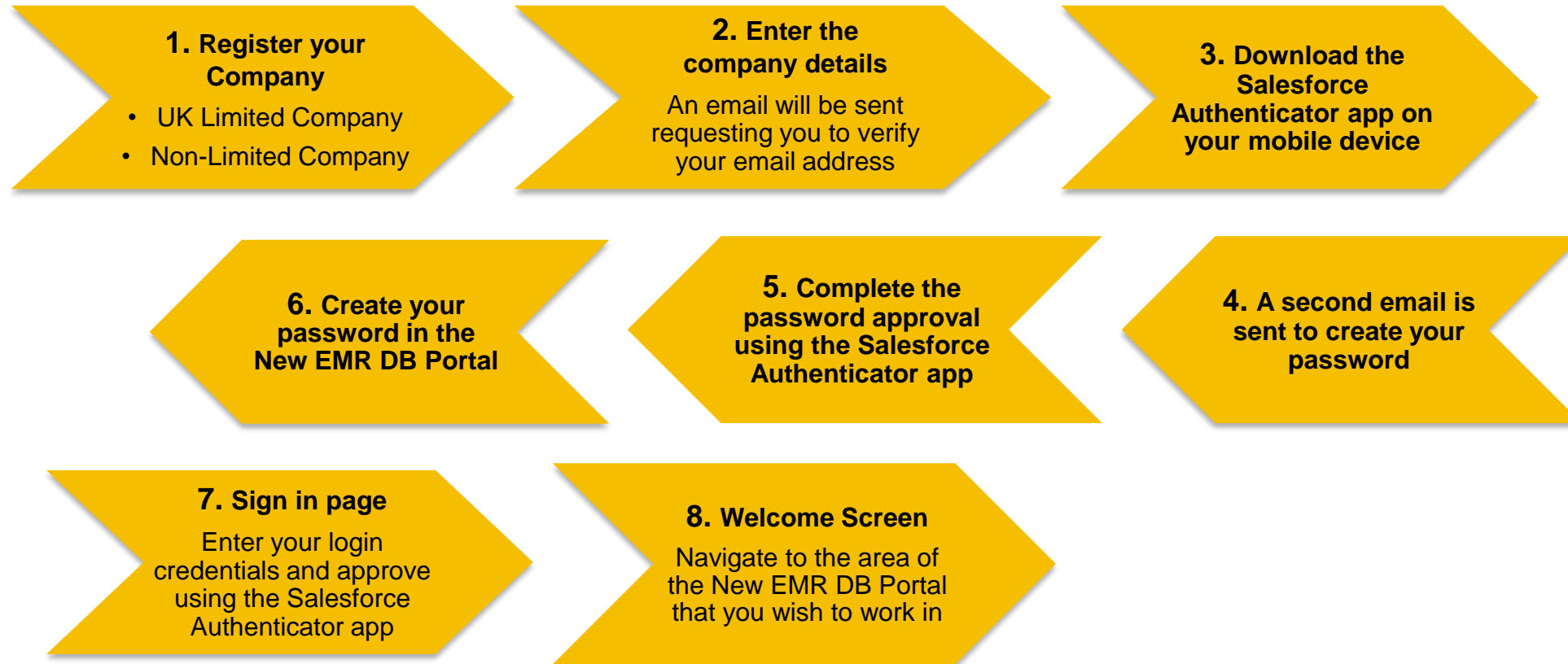
**3MB**

**Mandatory** file  
formats:

**Microsoft Office files,  
PDF or JPEG**  
(e.g. .docx/.xlsx/.pdf)



# EMR Company Registration process



# Single Sign-on Approach (1/2)

The screenshot shows the 'User Management' section of the EMR DB Portal for National Grid PLC. The navigation bar includes 'My EMR', 'NATIONAL GRID PLC', 'User Management', 'Company Management', 'nationalgridESO', and 'Electricity Market Reform Delivery Body'. The main content area is titled 'User Management / Active Users' and features a 'Display' toggle for 'Active Users' and 'Deactivated Users', along with 'Add Nominated Agent' and 'Add user' buttons. Below this are three filter dropdowns for 'Filter Companies', 'Filter Roles', and 'Filter Privileges', all set to '- Display All -'. A search bar labeled 'Search Active Users' is also present. At the bottom, a table header is visible with columns: Status, First Name, Last Name, Landline, Role, Privileges, and More.

In the New EMR DB Portal, there will no longer be a need to have a different username and password for each account that you manage.

All of your accounts can be managed using one set of login credentials.

You will administer each of your accounts under the **Company Management** and **User Management** sections of the New EMR DB Portal.

Further details on Company Management and User Management can be found in slides [32](#) and [39](#) of this guidance document.

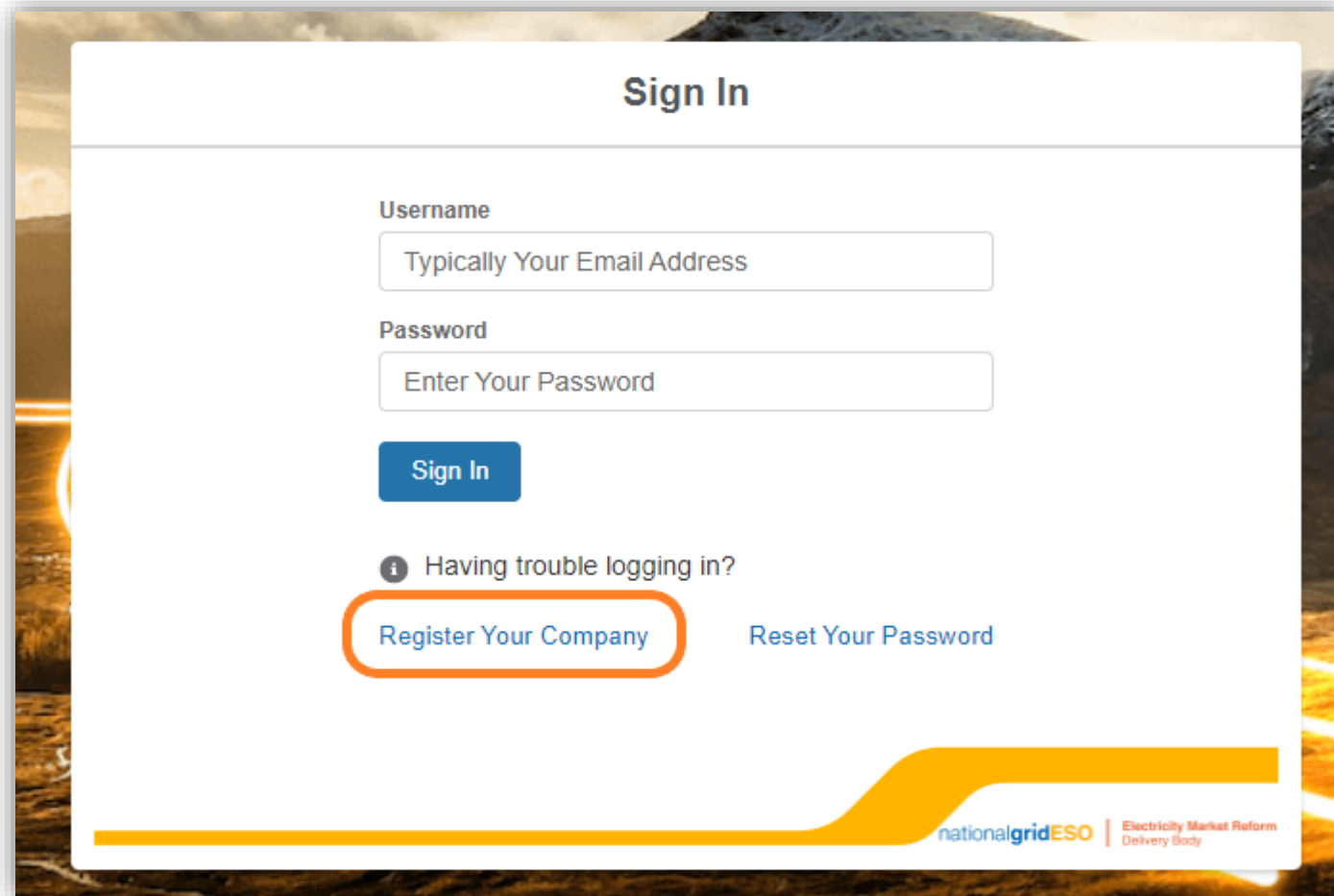
# Single Sign-on Approach (2/2)

Portfolio	A	B	C
	<b>Company 1</b>	<b>Company 2</b>	<b>Company 3</b>
<b>Company 1</b>	<b>Big Energy 1</b>	<b>Big Energy 2</b>	<b>Big Energy 3</b>
<b>Main Admin</b>	Madmin email 1	Madmin email 2	Madmin email 3
<b>Deputy</b>	Depadmin email 1	Depadmin email 2	Depadmin email 3
<b>Company 2</b>	<b>Big Energy 2</b>		
<b>Main Admin</b>	Madmin email 1		
<b>Deputy</b>	Depadmin email 1		
<b>Company 3</b>	<b>Big Energy 3</b>		
<b>Main Admin</b>	Madmin email 1		
<b>Deputy</b>	Depadmin email 1		

- To register and manage more than one company using the same contact email address (single sign-on) for each company, refer to column A then move to [slide 32](#)
- If you prefer to register more than one company and manage each company using different contact email addresses, refer to columns B and C) then move to [slide 9](#)



# Company Registration



The screenshot shows a 'Sign In' form with the following elements:

- Sign In** (Section Header)
- Username** (Label) with a text input field containing 'Typically Your Email Address'
- Password** (Label) with a text input field containing 'Enter Your Password'
- Sign In** (Blue Button)
- Having trouble logging in?** (Information icon and text)
- Register Your Company** (Link, highlighted with an orange rounded rectangle)
- Reset Your Password** (Link)
- nationalgridESO | Electricity Market Reform Delivery Body** (Logo and text at the bottom)

The Company Registration process begins in the same way for both Limited and Non-limited companies.

To register a company, go to the [NEW EMR DB Portal](#)

**nationalgridESO** | Electricity Market Reform  
Delivery Body

Home

**NEW EMR DB Portal**

Capacity Market

Click **Register Your Company**

# Company Registration

Welcome to the EMR Delivery Body Portal



The Capacity Market ensures Great Britain has a secure and affordable supply of electricity and safeguards against the possibility of future blackouts. Generators of electricity, who have registered and pre-qualified, participate in competitive Capacity Market Auctions where they commit to meeting their Capacity Market Obligation during a System Stress Event.

Register a UK Limited Company

Register a Non Limited Company

**nationalgrid**ESO | Electricity Market Reform  
Delivery Body

A new window will open showing two options:

- Register a UK Limited Company
- Register a Non Limited Company

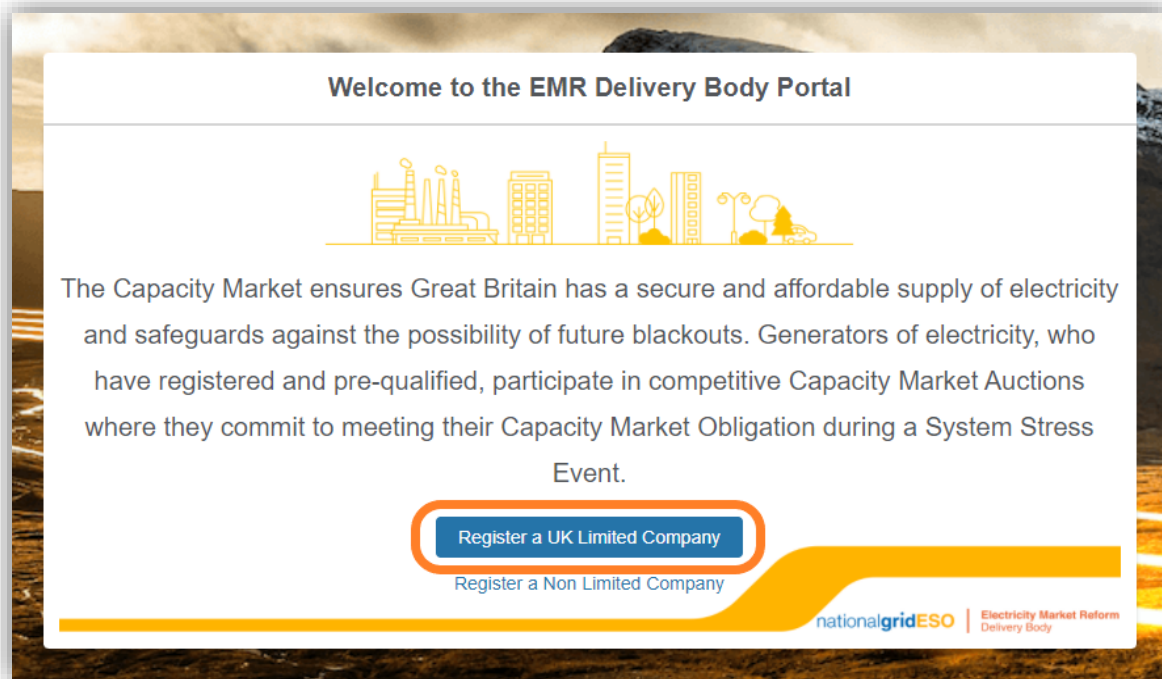
A Smart phone and access to [Companies House](#) is required for this process.

# Limited Company

How to register a Limited Company



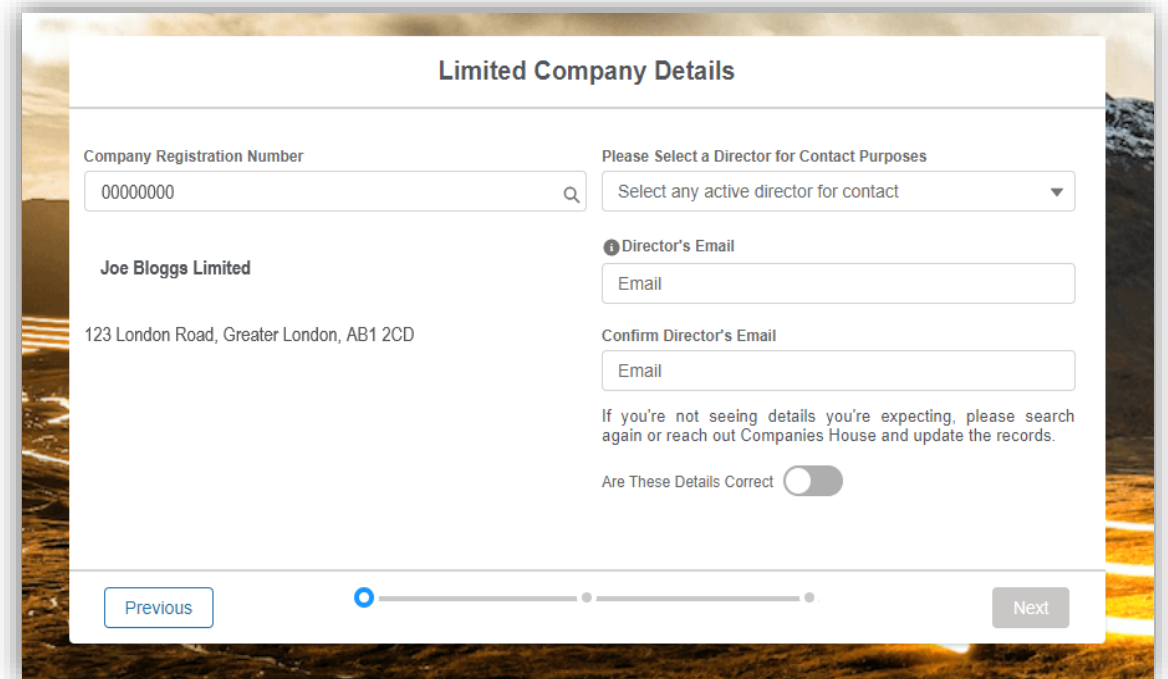
# 2. How To Register a Limited Company



**Step 1:** To register a UK Limited Company, click on [Register a UK Limited Company](#)

**Note:**

A company will be located if it is an active UK registered company on Companies House.



**Step 2:** Input the Company Registration Number and press [Enter](#) on your keyboard.

This will begin the system search for the company information direct from Companies House. It usually takes a couple of seconds to retrieve the information.



# Enter the Limited Company Details

**Limited Company Details**

Company Registration Number: 00000000

Company Name: Joe Bloggs Limited

Address: 123 London Road, Greater London, AB1 2CD

Please Select a Director for Contact Purposes: Joe Bloggs

Director's Email: companydirectoremail@companydomain.prefix

Confirm Director's Email: companydirectoremail@companydomain.prefix

If you're not seeing details you're expecting, please search again or reach out Companies House and update the records.

Are These Details Correct

Previous Next

**Your Contact Details**

Your First Name: Joanna

Your Last Name: Bloggs

Your Email: yourcompanyemail@companydomain.prefix

Your Mobile Number: United Kingdom, 44, 00000000000

Your Landline Number: United Kingdom, 44, 00000000000

I confirm that I have the authority to act on behalf of Joe Bloggs Limited in respect of the Capacity Market.

Previous Finish

**Step 3:** Once located, please select a Director from the drop-down menu. Key in the Director's email address in the relevant text boxes (this is for confirmation of registration).

Click on the toggle next to **Are These Details Correct**

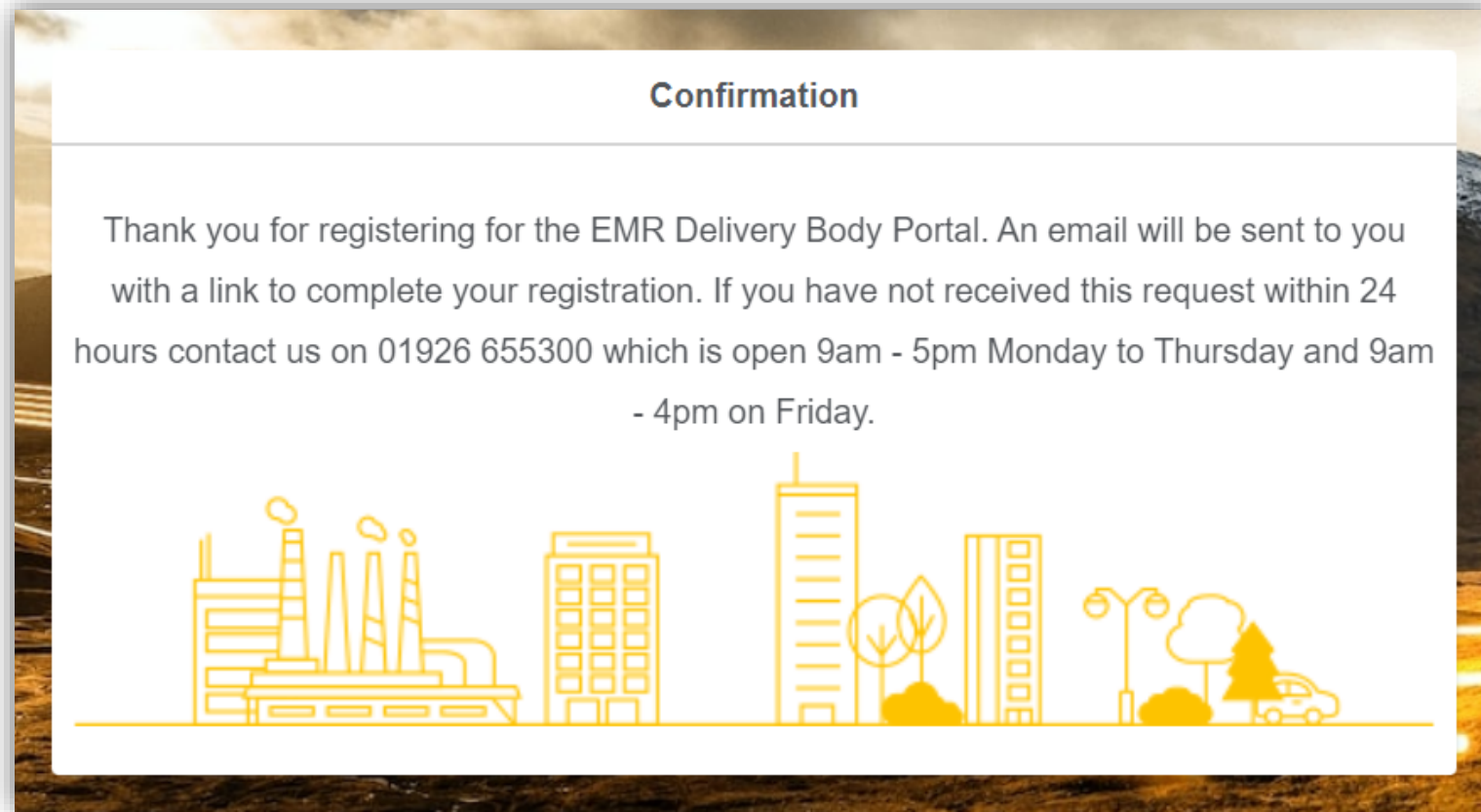
Click **Next**

**Step 4:** Enter the Main Admin contact details.

Turn on the toggle next to: **I confirm that I have the authority to act on behalf of \*company name\* in respect of the Capacity Market**

Click **Finish**

# Registration Confirmation



A Confirmation window will open to inform you that an email will be sent for you to complete the Company Registration.

Navigate to [slide 22](#) of this guidance document to log in to the New EMR DB Portal.



# Non-Limited

How to Register a Non-Limited Company



# 3. How to Register a Non-Limited Company



Non Limited Company Details

Business Type: Partnership

Address: 123 London Road

Business Name: Joe Bloggs Co.

Address: London Court

Address: Line 2

Town: London

Locality: Greater London

Postal Code: AB1 2CD

Country: United Kingdom

Previous

Next

**Step 1:** To register a Non-Limited Company, click on **Register a Non Limited Company**

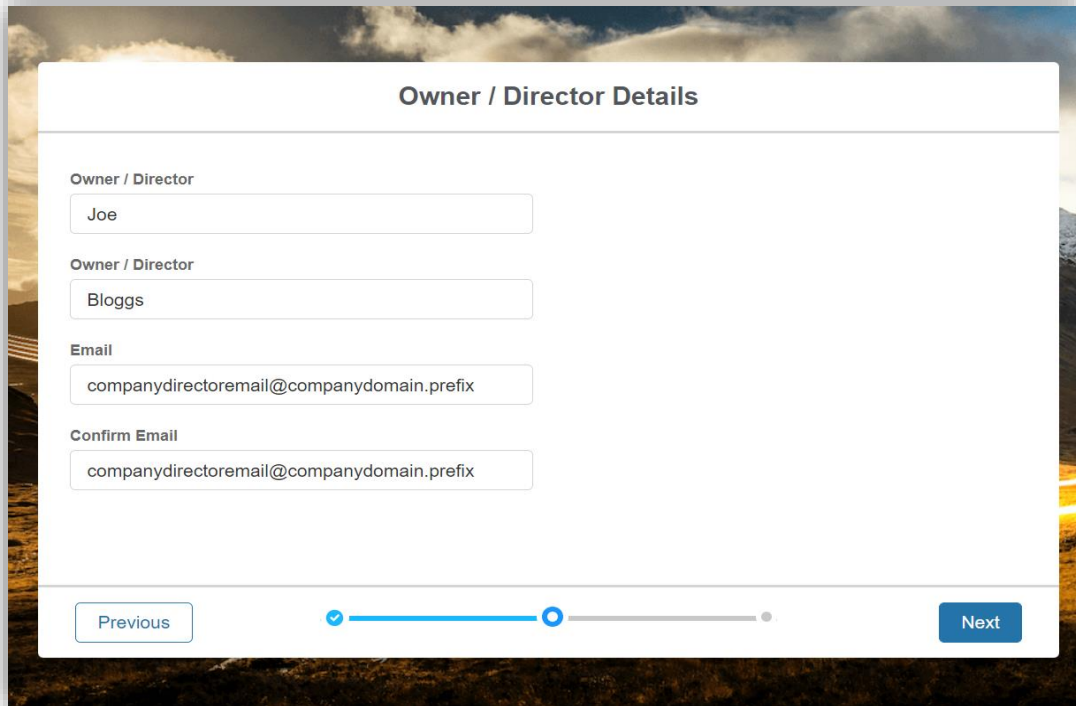
**Step 2:** Select the company Business Type from the drop-down menu and complete the company details.

Click **Next**

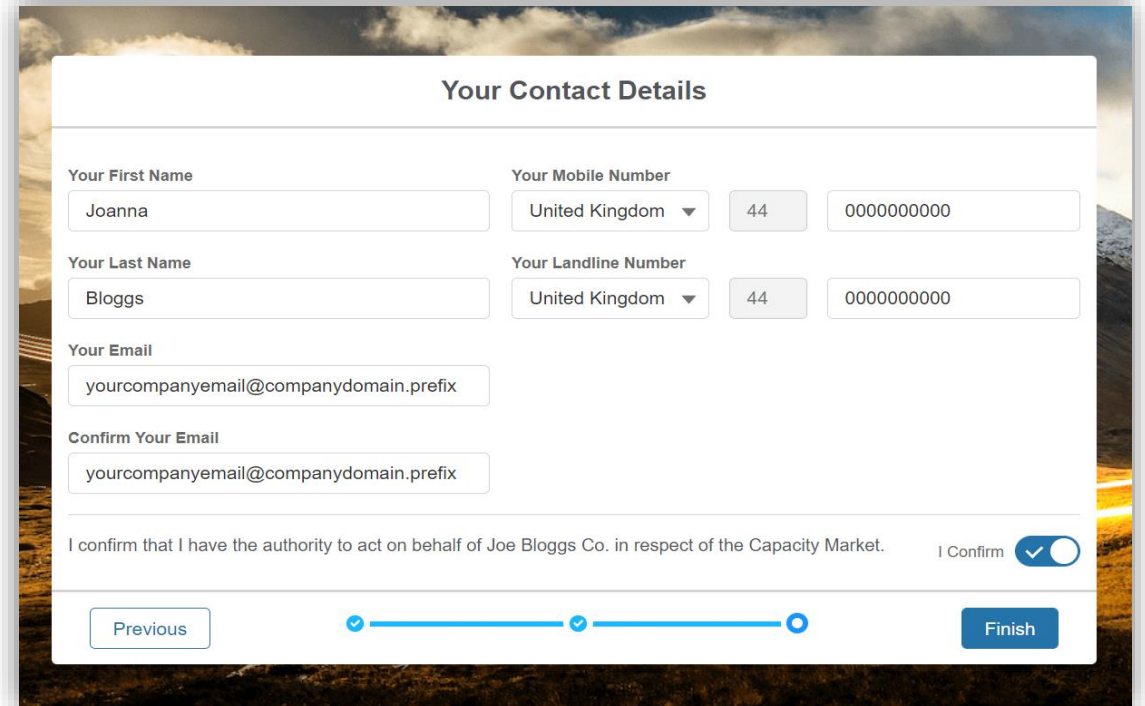
**Note:**

Non-Limited Company Registration applications are assessed by the Delivery Body.

# How to Register a Non-Limited Company



The screenshot shows a registration form titled "Owner / Director Details". It contains four input fields: "Owner / Director" (with "Joe" entered), "Owner / Director" (with "Bloggs" entered), "Email" (with "companydirectoremail@companydomain.prefix" entered), and "Confirm Email" (with "companydirectoremail@companydomain.prefix" entered). At the bottom, there is a "Previous" button, a progress indicator with a blue circle and checkmark, and a "Next" button.



The screenshot shows a registration form titled "Your Contact Details". It contains several input fields: "Your First Name" (with "Joanna" entered), "Your Mobile Number" (with "United Kingdom" selected, "44" entered, and "0000000000" entered), "Your Last Name" (with "Bloggs" entered), "Your Landline Number" (with "United Kingdom" selected, "44" entered, and "0000000000" entered), "Your Email" (with "yourcompanyemail@companydomain.prefix" entered), and "Confirm Your Email" (with "yourcompanyemail@companydomain.prefix" entered). Below the fields is a confirmation statement: "I confirm that I have the authority to act on behalf of Joe Bloggs Co. in respect of the Capacity Market." with a "Confirm" toggle switch that is turned on. At the bottom, there is a "Previous" button, a progress indicator with two blue circles and checkmarks, and a "Finish" button.

**Step 3:** Enter the details of the Owner or Director of the company you are registering.

Click **Next**

**Step 4:** Enter the contact details for the **Main Admin**

Turn on the toggle next to: **I confirm that I have the authority to act on behalf of \*company name\* in respect of the Capacity Market**

Click **Finish**



# Registration Confirmation

## Registration Completed

Thank you for registering for the EMR Delivery Body Portal. You will receive an update on your registration within 5 working days.



A confirmation window will open to notify you that the Company Registration application has been submitted to the Delivery Body for review.

If you are experiencing any issues with completing a Company Registration request for a Non-Limited Company, please contact the Delivery Body by email at:

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

# Non-Limited Companies – Supporting Documents

To complete the Company Registration application for a Non-Limited Company, you may be asked to provide supporting documents to the Delivery Body by email at [box.emr.prequal@nationalgrideso.com](mailto:box.emr.prequal@nationalgrideso.com)

The documents required will depend on the structure of the registering company as follows:

**Partnership** – Limited Liability Partnership (LLP). Formal documentation to be provided upon request by the Delivery Body, e.g. confirmation on company headed paper including a copy of the agreements detailing the partnership between the companies and proof of ownership of the asset, and a signature confirming the owner/director's authority from each party.

**Community Project** – Formal documentation to be provided upon request by the Delivery Body. Confirmation on company headed paper signed by the nominated owner/director stating that they have the relevant decision-making authority, as well as any formal documents relating to the formation of the organisation, its function and organisational chart.

**Foreign Company** – Formal documentation to be provided upon request by the Delivery Body. Confirmation on company headed paper of the company name, company address, company registration number and a signature confirming the owner/director's authority.

# Post Registration

<DD/MM/YYYY>

## EMR Delivery Body Portal Registration

You recently submitted a request to register <Company DEF> to EMR Delivery Body Portal. The information you provided has now been reviewed and has been successful.

To complete your registration please log into the Portal and add your Company details.

Thanks,

**National Grid (ESO) – EMR Delivery Body**

Following review by the Delivery Body of a Company Registration application for a Non-Limited Company, if it is successful, you will receive an email inviting you to log into the New EMR DB Portal.

If for any reason a Company Registration is rejected by the Delivery Body, you will be notified by email of the reason(s).

Should you wish to discuss why a Company Registration has been rejected, please contact the Delivery Body by email: [box.emr.prequal@nationalgrideso.com](mailto:box.emr.prequal@nationalgrideso.com)

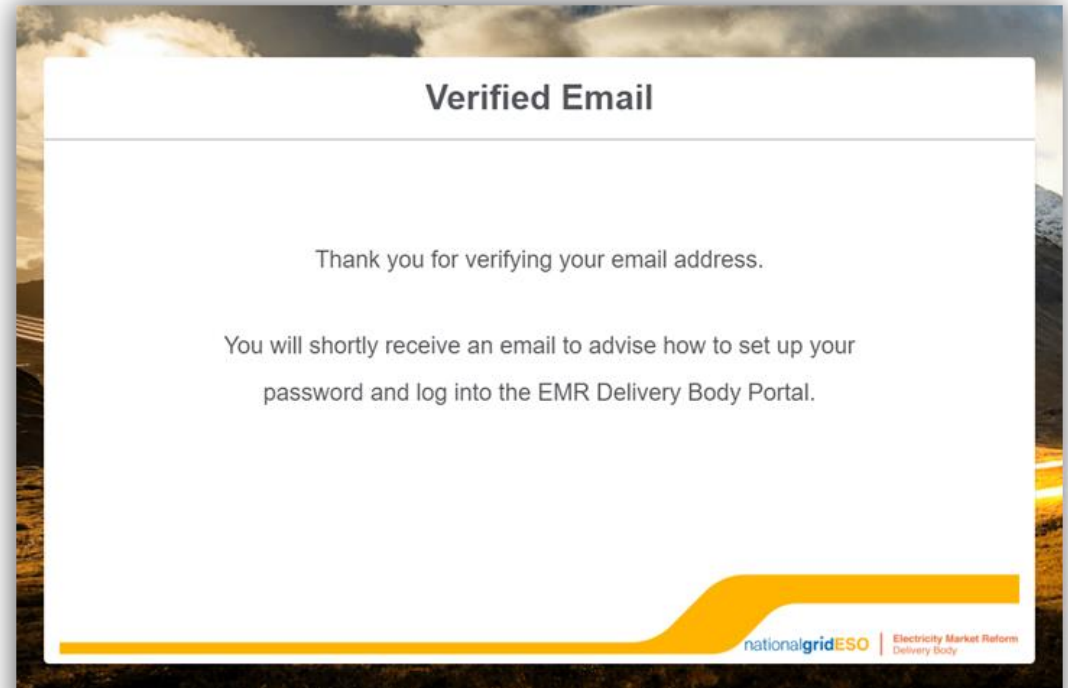
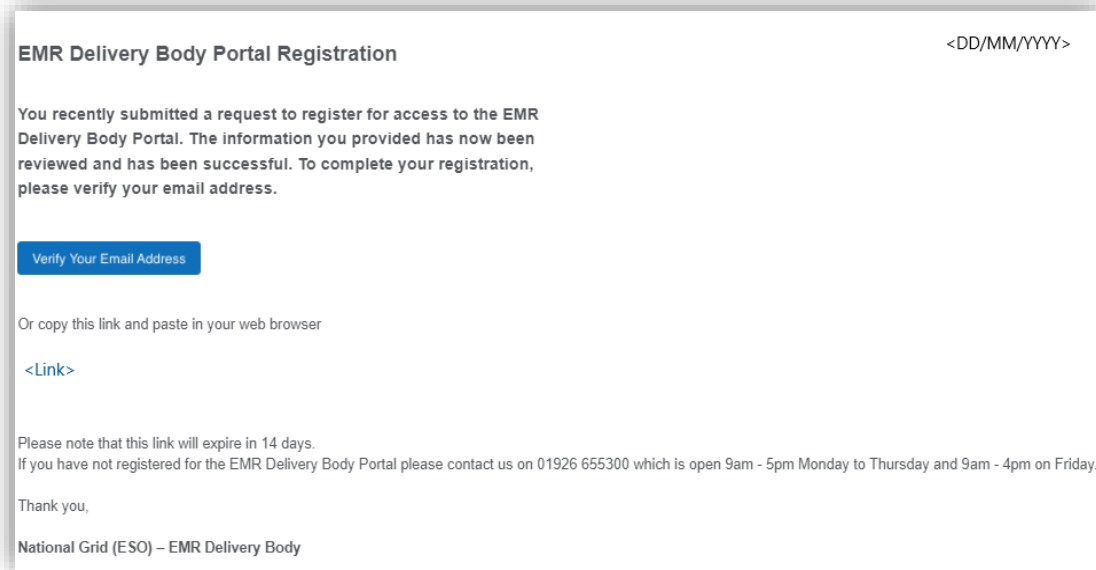
You will have the opportunity to resubmit an amended Company Registration application.



# Logging in



# 4. Verify your email address



Once a company has successfully been registered in the New EMR DB Portal, you will receive an email inviting you to verify your email address.

**Step 1:** Click [Verify Your Email Address](#) or paste the link into your browser.

A pop-up message will appear confirming that your email address has been verified.

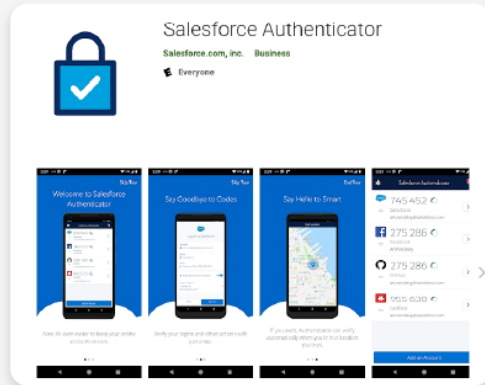
# Salesforce Authenticator App Download

<DD/MM/YYYY>

## Thank you for registering for the EMR Delivery Body Portal Registration

Your username is <email address>

To access the EMR Delivery Body Portal you will need to set up a password. As part of the password creation process you will need to use the Salesforce Authenticator app. First download the app from your mobile app store.



You will also receive an email asking you to set up a password for the New EMR DB Portal. Please check your Junk folder if you do not receive an email.

As part of our improved security measures, in order to log into the New EMR DB Portal, you will need to use the **Salesforce Authenticator app**.

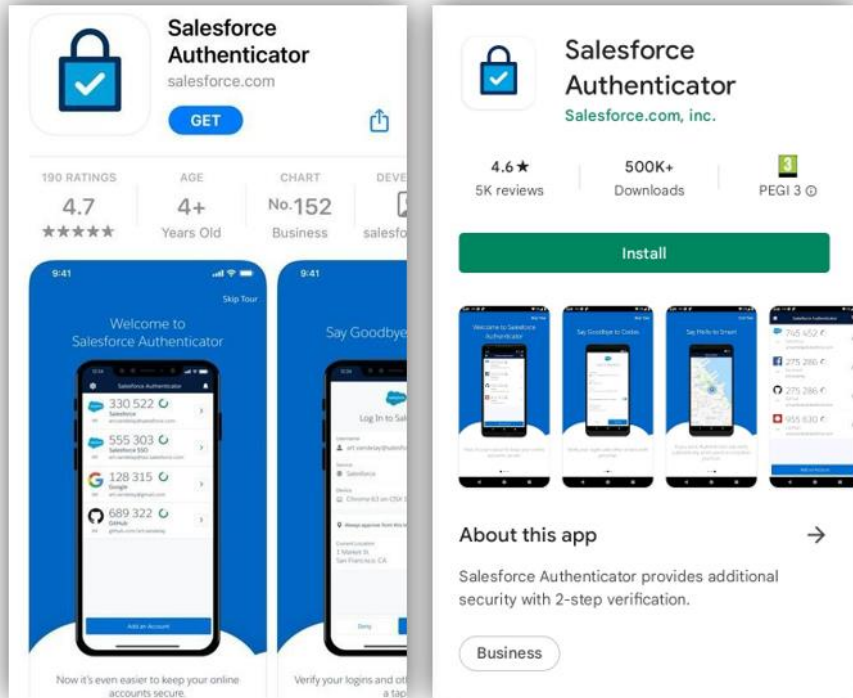
**Step 2:** On your mobile device, either click the link in the email for the relevant app store to download the Salesforce Authenticator app or go directly to the App Store.

### Note:

Every time you log in to the EMR DB Portal, you will need to approve your access through the Salesforce Authenticator app. A push notification from the app will automatically trigger so please ensure your app settings allow notifications.

See this article to learn more about your mobile app notification settings for [iOS](#) and [Android](#).

# Password Creation



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,

Once you have successfully installed the Salesforce Authenticator app, you can then create your password.

**Step 3:** Click **Create Your Password** in the email.



# Password Creation

**nationalgridESO**  
Electricity Market Reform  
Delivery Body

## Change Your Password

Enter a new password for  
**alice.beddow@nationalgrideso.com.cs81cs81.abeddow.**  
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

\* New Password  
..... Good

\* Confirm New Password  
..... Match

**Change Password**

A new browser window will automatically appear to allow you to set up your new password to access the New EMR DB Portal.

**Step 4:** You will be prompted to create a password.

**Step 5:** Once you have created a password that meets the requirements, select **Change Password**

# Logging in

**Sign In**

**Username**  
Typically Your Email Address

**Password**  
Enter Your Password

**Sign In**

**i** Having trouble logging in?

[Register Your Company](#)      [Reset Your Password](#)

**nationalgridESO** | Electricity Market Reform  
Delivery Body

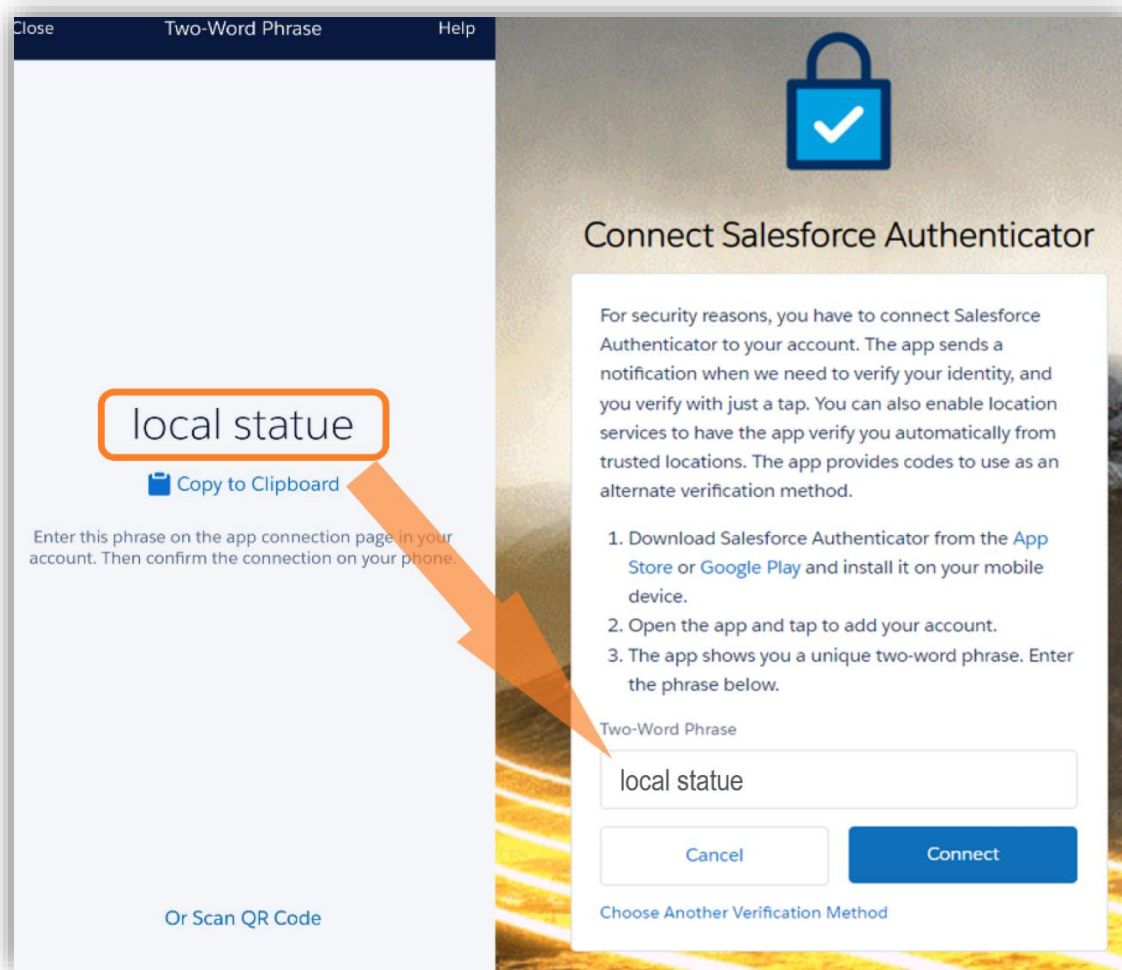
You will be redirected to the **Sign In** page where you can log in using the username sent to you via email and the password you have just set up.

**Step 6:** Enter your username (supplied in the successful registration email) and password.

Click **Sign In**



# Connect Salesforce Authenticator



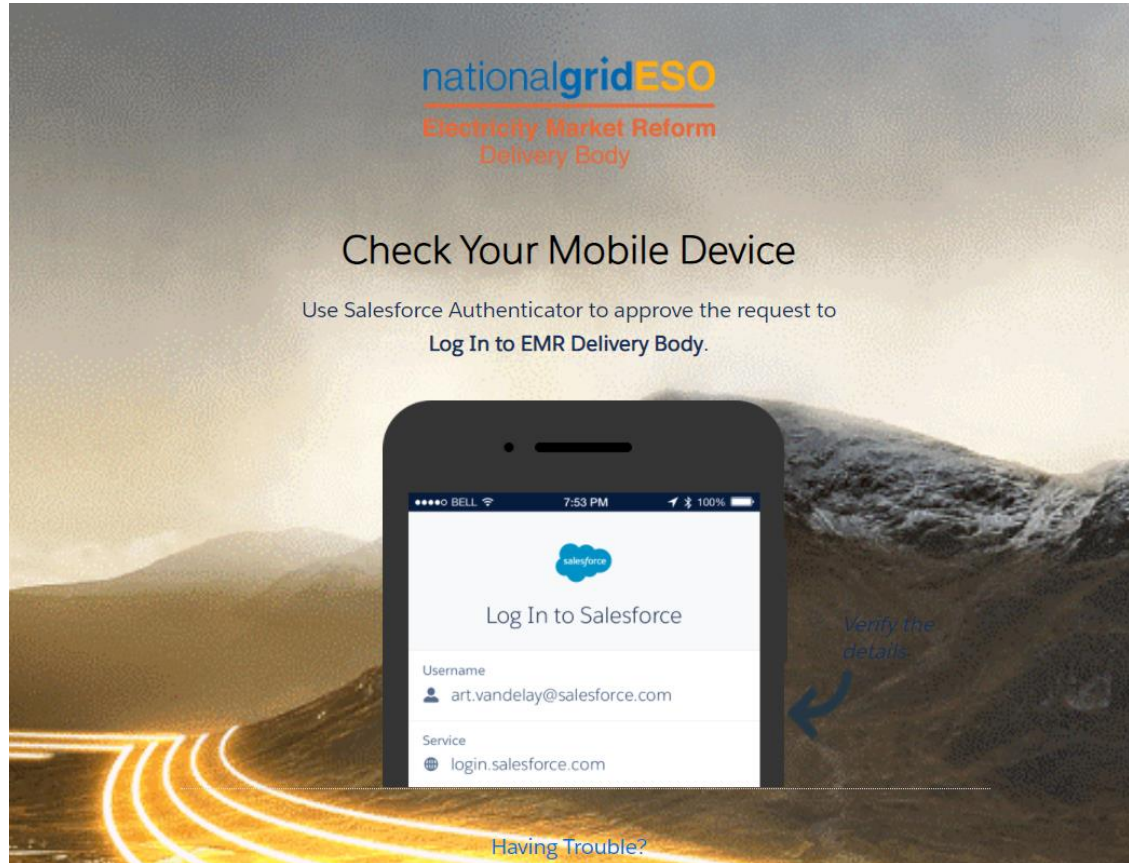
In order to complete the sign in, you will need to connect Salesforce Authenticator to your New EMR DB Portal account.

**Step 7:** Open the Salesforce Authenticator app. Click **Add an Account** (located at the bottom of the app screen).

**Step 8:** Enter the words shown under **Two-Word Phrase** into the text box on your browser screen.

**Step 9:** Click **Connect**

# Connect Salesforce Authenticator



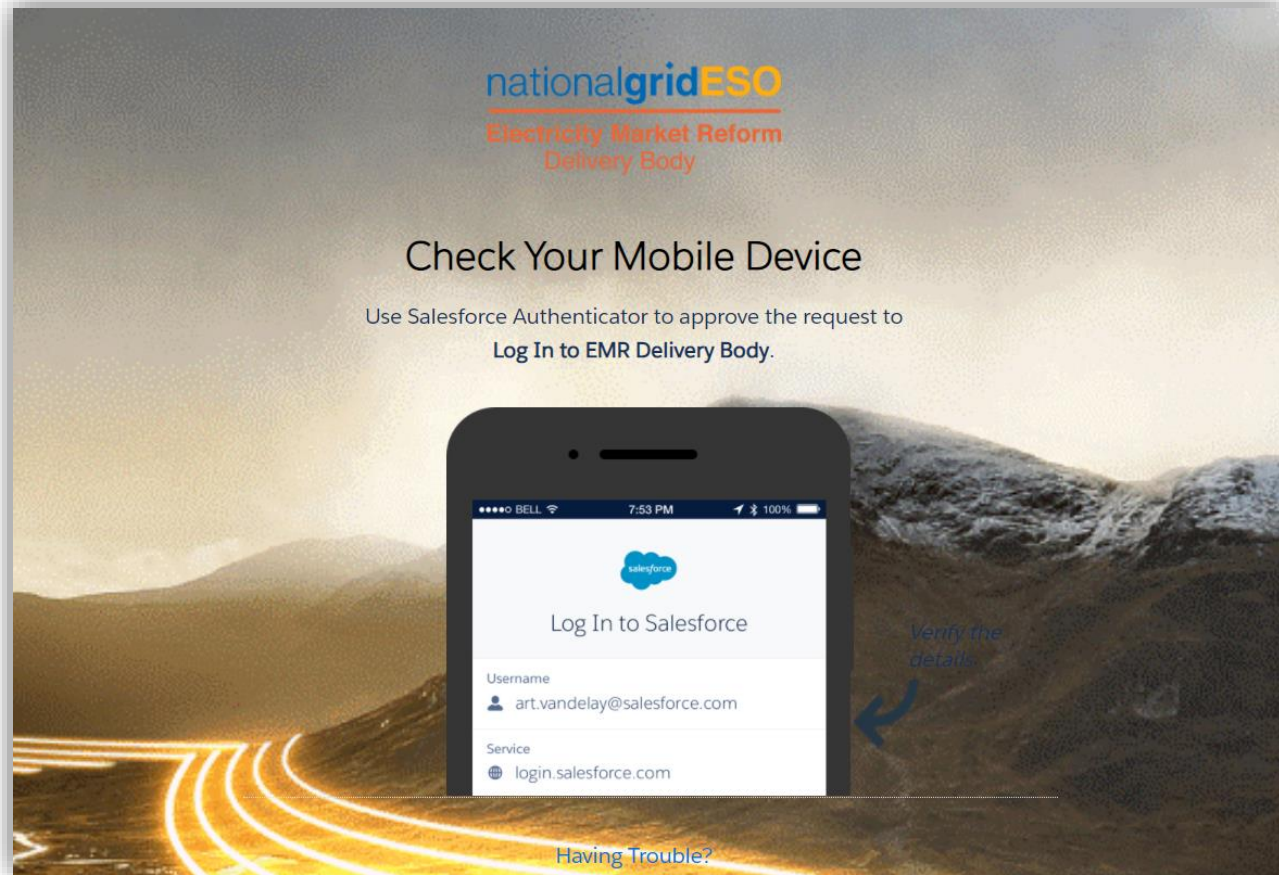
The screen on your Salesforce Authenticator app will change to include your New EMR DB Portal username and the service name (Salesforce).

**Step 10:** Click **Connect** in the Salesforce Authenticator app.

The screen on the Salesforce Authenticator app will change again.

**Step 11:** Select **Approve** in the Salesforce Authenticator app to approve the connection.

# Salesforce Authentication



**Step 12:** You will receive a notification alerting you to check your mobile device.

**Step 13:** Select **Approve** in the Salesforce Authenticator app in order to approve the login.

When you approve the connection through the Salesforce Authenticator app, you will also receive an email with the similar subject: A new verification method was added to your EMR Delivery Body account.

# Welcome Screen



## Welcome to the EMR Delivery Body Portal

To create/manage additional users select User Management.  
To add further information about your company, or to tell us about additional companies, select Company Management.

Once you have successfully logged into the New EMR DB Portal, you will see the welcome screen.

From here, you can navigate to the [User Management](#) and [Company Management](#) areas of the New EMR DB Portal.



# Company Management





# 5. Adding an Additional Company

The screenshot shows the 'Company Management' page in the nationalgridESO system. The top navigation bar includes 'My EMR', 'User Management', and 'Company Management' (highlighted with a red box and a '1'). The 'Add A Company' button is highlighted with a red box and a '2'. Below the navigation bar is a search box labeled 'Search Companies'. A table lists the following company:

Company Name	National Grid ID	Legacy ID	More
Joe Bloggs LIMITED	NGRID-220364		

**Step 1:** In the top left of the welcome screen, select **Company Management**

This will take you to the screen which lists all companies associated with the account.

**Step 2:** Click **Add A Company** in the top right of the screen.

# Adding an Additional Limited Company

If you are registering a UK limited company, please enter the Companies House registration number. Or if registering a non limited company or from outside the UK, please select the business type from the drop down list.

1  LTD Company  NON Limited Company

2 UK Company/Business Registration Number  
00000001

Company Name  
Bob Smith Limited

321 London Street, Greater London, DC2 1AB

Please Select a Director for Contact Purposes  
Bob Smith

3 Director's Email  
bobsmith@smithslimited.com

Confirm Director's Email  
bobsmith@smithslimited.com

If you're not seeing details you're expecting, please search again or reach out Companies House and update the records.

These Details Are Correct

4 Save

In the next screen, select whether it is a Limited or Non-Limited Company.

To register a Limited company:

1. LTD Company will automatically be pre-selected.
2. Input the UK Company Registration Number and press **Enter** on your keyboard to start the company details search.
3. Select a Director from the drop-down menu and the Director's email address. Click on the toggle next to **These Details Are Correct** to confirm the details.
4. Click **Save**

# Adding an Additional Non-Limited Company

If you are registering a UK limited company, please enter the Companies House registration number. Or if registering a non limited company or from outside the UK, please select the business type from the drop down list.

LTD Company  NON Limited Company **1**

**2** Business Type  
Partnership

Business Name  
Bob Smith Partners

Owner / Director For Contact Purposes  
Bob

Owner / Director For Contact Purposes  
Smith

Owner / Director Email  
bobsmith@smithspartners.com

Confirm Owner / Director Email  
bobsmith@smithspartners.com

Company / Business Address  
321 London Street

Address  
London Tower

Address  
Line 2

Town  
London

Locality  
Greater London

Postal Code  
DC1 2BA

Country  
United Kingdom

**3**

**4** Save

To register a Non-Limited Company:

1. Select NON Limited Company
2. Select Business Type from the drop-down menu and enter the Business Name
3. Complete the Owner / Director contact and the company address details.
4. Click Save

# Company Overview Page

The screenshot shows the 'Company Management' page in the nationalgridESO portal. The top navigation bar includes 'My EMR' (Joe Bloggs LIMITED - Primary Company), 'User Management', and 'Company Management' (highlighted with an orange box and a '1'). The 'nationalgridESO' logo and 'Electricity Market Reform Delivery Body' are also visible. Below the navigation, there is a 'Company Management' header with an 'Add A Company' button and a search bar labeled 'Search Companies'. A table displays the following data:

Company Name	National Grid ID	Legacy ID	More
Bob Smith Limited	NGRID-220402		⋮
Joe Bloggs LIMITED	NGRID-220364		⋮

The first row of the table is highlighted with an orange box, and a '2' is placed next to it.

After registering a new company in the New EMR DB Portal, your browser will automatically refresh showing the **Company Management** tab.

The company that has been added will show as a new entry in the list.



# Managing Company Details

The screenshot shows the 'Company Management' section of the nationalgridESO portal. The top navigation bar includes 'My EMR' (Bob Smith Limited), 'User Management', and 'Company Management' (highlighted with a red '1'). The main content area has a search bar and a table of companies. The table has columns for 'Company Name', 'National Grid ID', 'Legacy ID', and 'More'. The 'More' column for 'Bob Smith Limited' is highlighted with a red circle and a white '2', indicating the next step in the process.

Company Name	National Grid ID	Legacy ID	More
Bob Smith Limited	NGRID-220402		⋮ 2
Joe Bloggs LIMITED	NGRID-220364		⋮

## Company Management

A Company Certificate of Incorporation, VAT number and Secondary Trading details can be added directly into the New EMR DB Portal in the Company Management area.

**Step 1:** Navigate to **Company Management**. A list of all companies that the User can edit will be displayed.

**Step 2:** Click on the three vertical dots on the right of the Company Name.

# Secondary Trading Details and File Upload

**Registered Company Information**

UK Company/Business Registration Number  
00000001

Company Name: ⓘ  
Bob Smith Limited

321 London Street,  
London Tower,  
DC1 2BA  
United Kingdom

Director / Owner for initial point of contact  
Bob Smith

Email  
bobsmith@smithslimited.com

**Secondary Trading**

Secondary Trading Landline  
United Kingdom 44 00000000000

Secondary Trading Email  
secondaryemail@smithslimited.com

Confirm Secondary Trading Email  
secondaryemail@smithslimited.com

Are you Registered for UK VAT?

UK VAT Registration  
12345678

**Required Documentation**

In order to finish the company registration, we will need to view Certificate of Incorporation.

The following filetypes are accepted .JPG, PDF, PNG, max 2Gb

Or drop files

A new screen will appear which will show the Registered Company Information on the left and Secondary Trading details on the right.

1. Enter the **Secondary Trading Landline** number, email address and confirm email address.
2. Toggle the switch **Are you Registered for UK VAT?** (if the company is registered for UK VAT).
3. Enter the company's **UK VAT Registration** number (if applicable).
4. Select **Upload Files** to add the Certificate of Incorporation, paying attention to the onscreen details outlining file type and size.
5. Once all the mandatory fields are filled in, click **Save & Close**

# User Management



# 6. User Types and Privileges – Main Admin

The Main Admin for each company should ordinarily be the person with managerial responsibility for the day-to-day participation in the Capacity Market.

- The Main Admin will be responsible for the adding, editing and removing other Users within an organisation, and for the creation of additional companies if required. They will also act as the main point of contact for any communications from the Delivery Body. There can only be one main admin listed per company in the New EMR DB Portal.
- The Main Admin and Deputy(s) can edit User privileges in the New EMR DB Portal for all the relevant Users linked to a company. If a person leaves the company, it is the responsibility of the Main Admin to deactivate them on the New EMR DB Portal.
- It is permissible for the Director of a registered company or organisation to also be the Main Admin.
- Main Admins have read and write permission by default.



# User Types and Privileges – Deputy

A Main Admin can register additional Users who can log into a company's area of the New EMR DB Portal and carry out specific roles.

Each of these Users must be given privileges to carry out specific roles.

A Main Admin can register one or more Deputies or Users:

- A Deputy can create additional companies, CMUs, Users and can also make amendments to existing CMU data. They cannot deactivate Users.
- A Deputy cannot change the details for a Main Admin but they can change other Deputy and User details.

# User Types and Privileges – User

A Main Admin or Deputy can create other Users to log into the Company Management area of the New EMR DB Portal and carry out specific tasks.

These Users can act on behalf of a main company or additional companies where they have been assigned the relevant privileges.

If a User is assigned **Read Only** privileges:

1. They can only view information for the company they are related to in the system.
2. They cannot see any other User details except their own.

If the User is assigned **Read and Write** privileges:

1. They can view and edit the information of the company they are related to.
2. They cannot see any other User details except their own.

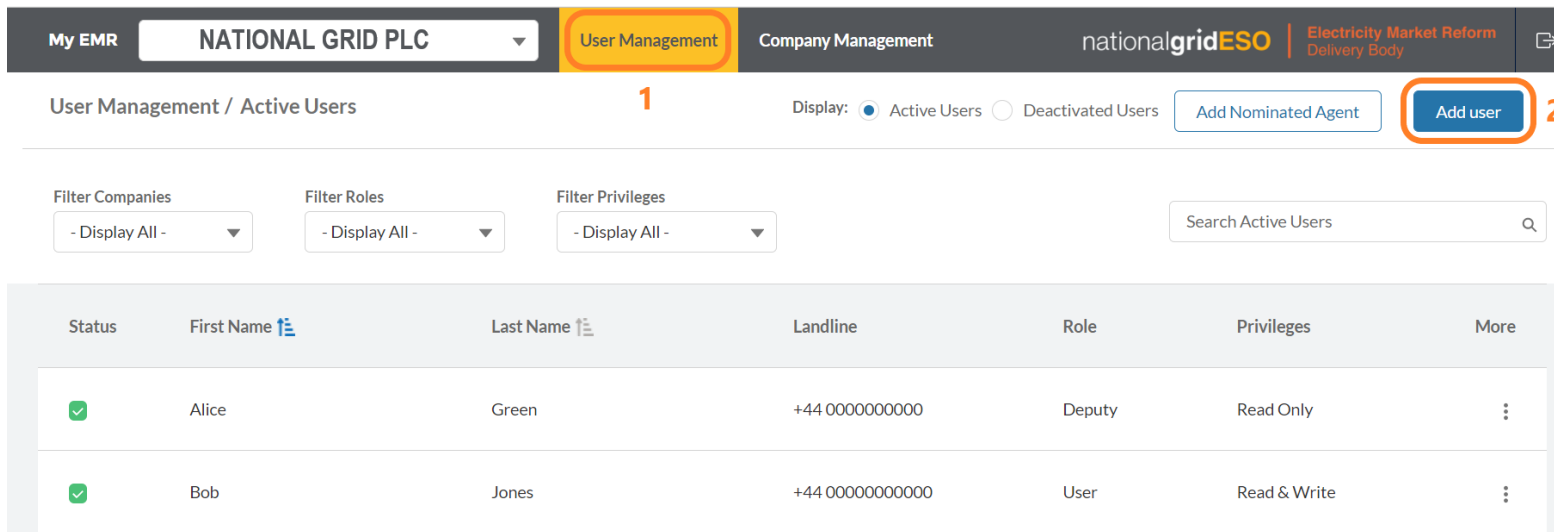
# User Management

The screenshot shows the 'User Management' section of the nationalgridESO interface. At the top, there is a navigation bar with 'My EMR', 'NATIONAL GRID PLC', 'User Management', and 'Company Management'. The 'User Management' tab is highlighted. To the right, the nationalgridESO logo and 'Electricity Market Reform Delivery Body' are visible. Below the navigation bar, the page title is 'User Management / Active Users'. There are two radio buttons for 'Display: Active Users' (selected) and 'Deactivated Users'. Two buttons are present: 'Add Nominated Agent' and 'Add user'. Below these are three filter dropdowns: 'Filter Companies' (set to '- Display All -'), 'Filter Roles' (set to '- Display All -'), and 'Filter Privileges' (set to '- Display All -'). A search bar labeled 'Search Active Users' is also present. At the bottom, a table header is visible with columns: Status, First Name, Last Name, Landline, Role, Privileges, and More.

Click **User Management** on the top left hand side of the welcome screen.

This page will list all Users who are assigned to each account for which you are Main Admin and will include their role and privileges.

# Add A New User



My EMR NATIONAL GRID PLC User Management Company Management nationalgridESO Electricity Market Reform Delivery Body

User Management / Active Users 1 Display:  Active Users  Deactivated Users Add Nominated Agent Add user 2

Filter Companies Filter Roles Filter Privileges

- Display All - - Display All - - Display All - Search Active Users

Status	First Name	Last Name	Landline	Role	Privileges	More
<input checked="" type="checkbox"/>	Alice	Green	+44 0000000000	Deputy	Read Only	⋮
<input checked="" type="checkbox"/>	Bob	Jones	+44 0000000000	User	Read & Write	⋮

Users with the relevant permissions can create other Users in the New EMR DB Portal.

**Step 1:** To create a new User, navigate to the **User Management** tab.

**Step 2:** Click **Add user**

This will open a new screen where you can input the details for a new User (see overleaf).

## Note:

The first User that must be created by the Main Admin is the Deputy. Once this is done, as many Deputies and Users as required can be created.



# Add a New User

User First Name: Stuart

User Last Name: Smith

Email: stuart.smith@bloggslimited.com

Confirm Email: stuart.smith@bloggslimited.com

Contact Mobile Number: United Kingdom, 44, 0000000000

Contact Landline Number: United Kingdom, 44, 0000000000

Role: Deputy

Privileges: Read & Write

Primary Company: Bob Smith Limited

Assign Additional Companies: 0

Authorised Individual:

Save & Close

## Note:

An Authorised Individual is a User that has the authority to place bids in the CM Auctions. Each Bidder may have up to four Authorised Individuals.

**Step 3:** Enter the details of the new User.

## Role

Click on the drop-down menu, select whether the new User is Main Admin, Deputy or User.

## Privileges

Click on the drop-down menu to customise whether the User has Read Only or Read and Write access to the New EMR DB Portal.

**Make sure to check the toggle if they are an Authorised Individual.**

**Step 4:** Click **Save & Close**

The new User will now receive an email inviting them to verify their email address and should follow the process from [Slide 21](#) onwards to set up their login details.

# Agent Nomination

The screenshot shows the 'User Management / Active Users' page in the National Grid PLC system. The 'User Management' tab is highlighted with a red box and labeled '1'. The 'Add Nominated Agent' button is highlighted with a red box and labeled '2'. The page includes a search bar for active users and a table of active users.

Status	First Name	Last Name	Landline	Role	Privileges	More
✓	Alice	Green	+44 0000000000	Deputy	Read Only	⋮
✓	Bob	Jones	+44 0000000000	User	Read & Write	⋮

**Step 1:** To add a nominated agent, navigate to the **User Management** tab.

**Step 2:** Click **Add Nominated Agent** in the top right of the screen.

This will open up a new screen that will allow you to fill in the Nominated Agent details.

# Agent Nomination

User Management / Add Nominated Agent

User First Name	<input type="text" value="Alex"/>	Role	<input type="text" value="User"/>
User Last Name	<input type="text" value="Reed"/>	Privileges	<input type="text" value="Read &amp; Write"/>
Email	<input type="text" value="alex.reed@smithslimited.com"/>	Primary Company	<input type="text" value="Bob Smith Limited"/>
Confirm Email	<input type="text" value="alex.reed@smithslimited.com"/>	Assign Additional Companies	<input type="text" value="1"/>
Contact Mobile Number	<input type="text" value="United Kingd..."/> <input type="text" value="44"/> <input type="text" value="00000000"/>	Authorised Individual	<input checked="" type="checkbox"/>
Contact Landline Number	<input type="text" value="United Kingd..."/> <input type="text" value="44"/> <input type="text" value="00000000"/>		<input type="button" value="Save &amp; Close"/>

1. Enter the details for the Nominated Agent.

The system defaults the Role of an Agent to that of a User, however you can still select the privileges an Agent will have.

2. Toggle to select if the User is an Authorised Individual.

3. Select **Save & Close**

To deactivate or edit Nominated Agent details, go to [slide 48](#)

## Note:

Exhibit E is only applicable to a Nominated Agent and must be provided as part of a Prequalification Application for review by the Delivery Body. It is not required at the point of nominating an Agent in the New EMR DB Portal.

# User Management Page Navigation

My EMR NATIONAL GRID PLC User Management Company Management nationalgridESO Electricity Market Reform Delivery Body

User Management / Active Users Display:  Active Users  Deactivated Users Add Nominated Agent Add user

Filter Companies Filter Roles Filter Privileges

- Display All - - Display All - - Display All -

Search Active Users

Status	First Name	Last Name	Landline	Role	Privileges	More
✓	Alice	Green	+44 0000000000	Deputy	Read Only	⋮
✓	Bob	Jones	+44 0000000000	User	Read & Write	⋮

The User Management page contains options to make the search and management of Users easy.

- 1. Display toggle:** Allows you to switch between the lists of Active Users and Deactivated Users. Active Users view is the default.
- 2. Filters:** Allow you to filter the list of Users by the company(s) that Users are related to, their Role and New EMR DB Portal privileges.
- 3. Search Active Users:** Allows you to search a list by a User's first or last name.
- 4. Sort function:** Allows you to sort your 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.

# Edit or Deactivate a User

The screenshot shows the 'User Management / Active Users' page in the nationalgridESO system. The 'User Management' tab is highlighted with a red box and a red '1'. The page displays a table of active users with columns for Status, First Name, Last Name, Landline, Role, Privileges, and More. The 'More' column for the first user, Alice Green, is highlighted with a red box and a red '2', indicating the three vertical dots used for editing or deactivating the user.

Status	First Name	Last Name	Landline	Role	Privileges	More
✓	Alice	Green	+44 0000000000	Deputy	Read Only	2 ⋮
✓	Bob	Jones	+44 0000000000	User	Read & Write	⋮

To Edit User data and/or permissions or to deactivate a User:

**Step 1:** Navigate to the **User Management** tab and search for the User that you need to amend in the list.

**Step 2:** Click on the three vertical dots on the right hand side of the User's name which allows you to edit the details.



# Edit or Deactivate a User



The screenshot shows a user management form with the following fields and values:

- User First Name: Bob
- User Last Name: Smith
- User Name: bobsmith@smithslimited.com.cs81cs81.bsmith
- Email: bobsmith@smithslimited.com
- Contact Mobile Number: United Kingdom, 44, 00000000000
- Contact Landline Number: United Kingdom, 44, 00000000000
- Role: Deputy
- Privileges: Read & Write
- Primary Company: Joe Bloggs LIMITED - Primary Company
- Assign Additional Companies: 1
- Authorised Individual:
- Active User:

A "Save & Close" button is located at the bottom right of the form.

A new screen will appear where you can change attributes such as First Name, Last Name, Contact Telephone Numbers, Role, Privileges, Primary Company and assign additional companies.

1. **Authorised Individual** toggle is used to indicate that a User is an individual that has the authority to place bids in the CM Auctions. Each Bidder may have up to four Authorised Individuals.

Authorised Individual	1	
Active User	2	

2. **Active User** toggle allows you to activate and deactivate a User. When a toggle is grey, it means a User is inactive. A blue toggle with a white checkmark means the User is active and can access the New EMR DB Portal.

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# Version Control

The table below shows the page numbers of any changes made to the document for each version.

Version	Changes	Pages	Date
1.0	Original Document	-	22/02/2022
2.0	<ul style="list-style-type: none"><li>• Maximum file size – 3MB not 35MB</li><li>• Screenshots updated</li><li>• Exhibit E not required at this stage – text updated to reflect this</li><li>• Changed Deputy Main Admin to Deputy</li></ul>	5 7, 41, 42, 44-47 45  38-40, 42, 43	24/02/2022
3.0	<ul style="list-style-type: none"><li>• Updated the screenshot from CM Portal to EMR DB Portal</li><li>• Re-ordered the sequence of the Salesforce Authenticator and Change of Password process</li><li>• Specified an Agent can only be a User</li></ul>	9  24-28  45	03/03/2022

# Version Control

The table below shows the page numbers of any changes made to the document for each version

Version	Changes	Pages	Date
4.0	Clarification on how a new User should complete their login details	43	30/03/2022
5.1	Clarified admin rights for Main Admin and Deputy.	40	13/06/2022
	Added table for guidance when managing a Portfolio of companies	31	
	Update Non- Limited Companies	19	



If you have any questions or concerns about anything described in this document, please contact us at [box.emr.prequal@nationalgrideso.com](mailto:box.emr.prequal@nationalgrideso.com)



[nationalgrideso.com](http://nationalgrideso.com)

National Grid ESO, Faraday House, Warwick Technology Park,  
Gallows Hill, Warwick, CV34 6DA

**nationalgrid**ESO