CMO.grexel

Account Holder User Manual

Version 10 (4.0.3)

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1 CMO.GREXEL – AN OVERVIEW

1.1 CMO.grexel

This application is compliant with relevant EU Directives and the European Energy Certificate System (EECS). Certificates are used to track electricity production attributes from production to consumption.

Main tasks an Account Holder (AH) can perform in the system are as follows:

An Account Holder (AH) user registers a Production Device. In this process the device is associated with the necessary parameters such as Licenses, Fuels, Meters, Owners, etc. (refer to Chapter 5.2)
On approval by the Issuing Body, the electricity produced by this Production Device (PD) is eligible for certification.
Periodically, the AH user or Issuing Body records and files Meter Readings and Declarations.
On approval, the Issuing Body (IB) issues certificates for the electricity produced.
After certificates have been issued, the Account Holder can Transfer, Cancel, Export or Import these certificates.

1.2 Supported Browsers and Versions

Recommended software to use CMO.grexel is Internet Explorer Version 8 (or higher), Mozilla Firefox Version 4 (or higher) or Google Chrome.

1.3 Supported Languages

CMO.grexel default language is English, but the system is also available in Hungarian, Croatian and Serbian. To change the language, use the **Select Language** dropdown menu on top right corner.

1.4 Terms Used

Table 1-1 – Terminology Used

Term used	Description
Account	The means by which an Account Holder can interact with this application. This is the source or destination for all transfer transactions.
Account Holder (AH)	A Production Device holder or trader or mixture of both. An Account Holder has an Account in the system to manage certificates.
Association	See License.
Cancellation	A type of transaction which leads to the cancellation of certificates by the Account Holder due to consumption.
Certificate	An official, tradable electronic document that is issued in lieu of energy produced by a Production Device.
Certificate Bundle	A set of identical certificates with consecutive serial numbers.
Declaration	A specification submitted by Account Holders to the Issuing Body (IB) along with Meter Readings for a production Device. The types of declarations include Fuel declarations and net/gross declarations.
Domain	A geographic area with a designated Issuing Body.
Earmark	This defines the nature of support associated with a Production Device. Examples include Production Support and Investment Support.
Energy Source	See Fuel.
Expiration	The Withdrawal of an EECS Certificate as a consequence of the passage of a given period of time since its issue.
Export	A type of transaction in which an Account Holder transfers certificates to an Account outside the AH's domain.
External Account	The Account of an Account Holder belonging to a different domain.
Fuel	This defines the source of energy associated with the Production Device.
GS1	The unique identifier number assigned to the organization by the global GS1 organization (usually only for the issuing bodies)
GSRN	The Global Service Relation Number linked to a Production Device.
Import	A type of transaction in which an Account Holder receives certificates from an External Account.
Issuing Body (IB)	An organization which issues certificates and also registers and approves production devices and Accounts.

License	Pre-defined set of Trading Schemes associated with a Production Device for a specific period of time and with a specific Purpose. E.g.: License 1: GOs, ICS:RECS (01.01.2011 - 31.12.2014) License 2: GOs (01.01.2015 – 31.12.2020)
Member Code	The Account Holder specific identifier code formatted according to AIB standards. Member Code is used if a certificate is transferred from an Account belonging to an external Registry.
Organization	A body which is associated with this system as an AH or IB. Member code, Business Id and Address are some of the identifying parameters linked to this body. The organization is also linked to some Licenses which are determined by the domain they belong to.
Plant	See Production Device.
Production Device (PD)	A separately metered device or group of devices that generates electricity. Parameters like Licenses, Fuels, Owners, etc., are defined for each device. Certificates are issued for energy produced by such devices.
Purpose	The purpose of the certificate is Disclosure for GOs/ICS:RECSs/EKO-Energy/etc.
Registrant	The party that requests a Production Device to be registered for certificate issuing. Often an Account Holder that owns a Production Device.
Registrar	The auditing authority to verify registered Plant information.
Registry	A database operated by a Member or by a CMO for the purposes of EECS. Certificates are held in the Registry, where Account Holders can perform Transactions with them.
Technology	The type of the Production Device, i.e. the processes and technology through which the Production Device generates electricity.
Trading Schemes	Different schemes that compound a License. E.g.: GO, ICS:RECS, EKO-Energy, etc.
Withdrawal	Corrective action that the IB can take to remove an erroneously issued or transferred certificate.

1.5 About This Guide

Note: This user guide is addressed to Account Holder users.

This guide describes how to use the CMO.grexel application effectively to manage its functions. This user guide explores the application from the **perspective of Account Holder users** and it is divided into the following chapters:

Table 1-2 – Organization of chapters

Chapter	Description
Chapter 1 – CMO.grexel – An Overview	This chapter introduces the CMO.grexel application, describes the workflow briefly and lists its requirements.
Chapter 2 – Getting Started	This chapter describes the steps to access and log in to the CMO.grexel application.
Chapter 3 – Managing Users	This chapter enumerates the different roles and rights of the users and the options under the **Users** module to create and manage different users for the application.
Chapter 4 – Managing the Organization	This chapter describes the option provided under the **My Page** module to maintain the details of your Organization.
Chapter 5 – Running & Maintaining Plants	This chapter describes the process of managing Production Devices (**Plants** module).
Chapter 6 – Managing Certificates	This chapter describes the actions to manage the Accounts of the Account Holder and to handle certificates. (**EECS-GO** module).
Chapter 7 – Generating Private Reports	This chapter describes the system of private reporting provided under the **Reports** module.
Chapter 8 – Support menu	This chapter provides support for users in the system. You can find user manuals and other relevant information.
Chapter 9 – Public Reports	This chapter describes the reports available on the public site of CMO.grexel

Table 1-3 – Typographical conventions used

Convention	Purpose	Example
Bold	Statements describing the execution of a function. Navigation paths in the CMO.grexel application.	Click **Cancel** to ignore the data entered and return to the main menu page. Navigate to **EECS-GO>Account Statement**.
Capitalized	Indicating that the word is defined in the Terminologies Used section.	*[…]* an Account Holder can make a Declaration *[…]*

Blue & Bold	A note to draw the attention of the reader.	**Note:** Important points that have to be taken care of while using the options.
Hyperlink	Link to specific locations inside the document.	Click the PD Registration Form to view the PD registration form details.

2 GETTING STARTED

This chapter describes the steps to access and log in to the CMO.grexel application. The application takes into consideration the functionalities and also the type of the users while defining access provisions.

2.1 Accessing CMO.grexel

CMO.grexel is accessible via an Internet browser and requires login. The system can be accessed at http://cmo.grexel.com. Users are given access to the functions of the system according to the roles assigned to them, and therefore if some activity described in this document is not accessible for you, you might not have permission to it.

Notes: The AH Root user can create other AH users and assign roles (Chapter 2.2).

Internet Explorer Version 8.0 (or higher), Mozilla Firefox Version 4.0 (or higher) or Google Chrome are the recommended browsers.

2.1.1 Log in to CMO.grexel

When a new organization is created in the system, the AH Root user of the organization can provide the user credentials to other users of the organization. A client certificate will be delivered to the email address that has been provided, along with an SMS containing the 8-digit PIN code. Prior to logging in for the first time, install the client certificate and validate it with the private key. If the private key is incorrect, an error message is shown.

The client certificate needs to be installed only once, but it expires after a year. After this period, the certificate must be reset and re-installed. You can see the expiration date on the home page on private site. See Chapter 3.6 for instructions on how to renew a client certificate.

The client certificate and/or pin code should never be forwarded or otherwise disclosed to anyone else than the original recipient of this information.

Note: If you are using Mozilla Firefox, remember to install the certificate on the browser.

Refer to this article for certificate installation https://grexel.kayako.com/Knowledgebase/Article/View/8/0/install-client-certificate-in-firefox-browser

1. To access the CMO.grexel web application, start your Internet browser and navigate to http://cmo.grexel.com.
2. The CMO.grexel public site is displayed (Figure 2.1). Click **Login** to navigate to the private site and use the client certificate to log in. If you face problems in authentication, see Chapter 3.6 or visit https://grexel.kayako.com
3. After login, the start-up screen of the CMO.grexel application is launched (Figure 2.2). The welcome screen should show pending tasks, alerts, news and information about the user.

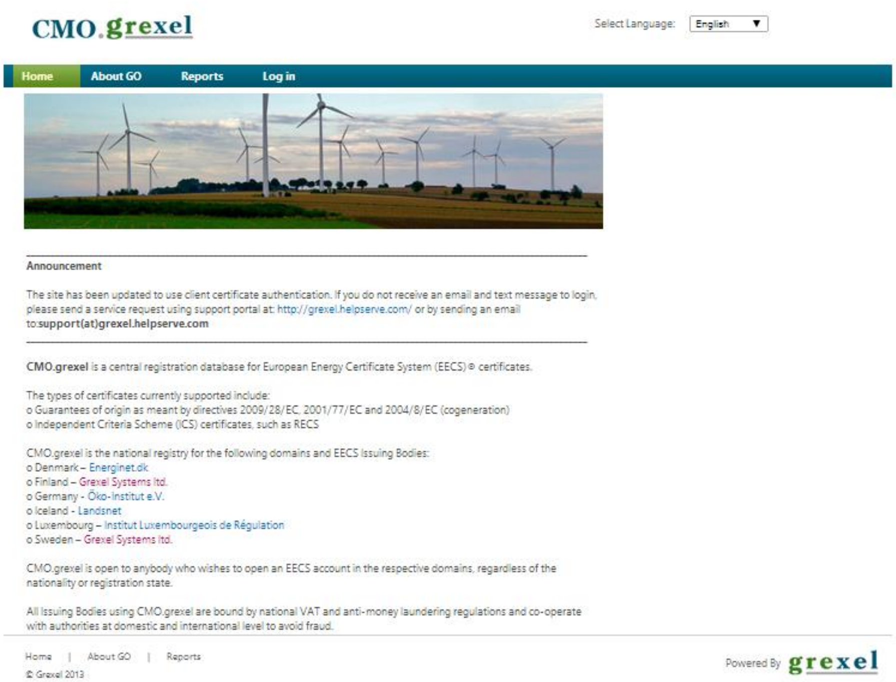


Figure 2.1 – CMO.grexel login screen

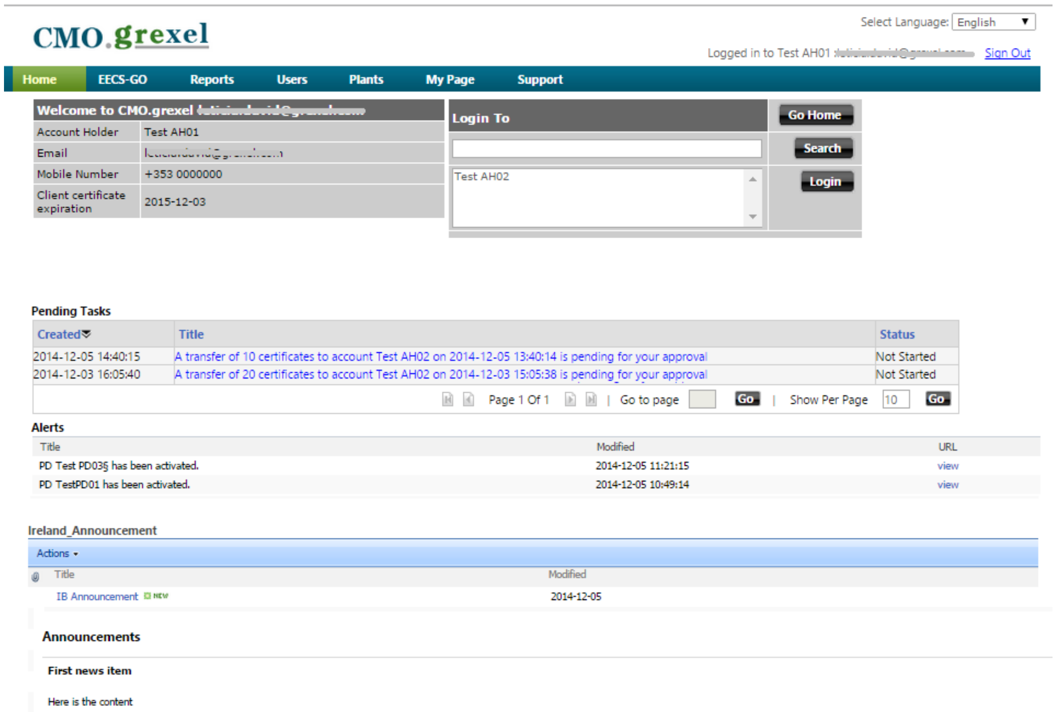


Figure 2.2 – CMO.grexel start-up screen

2.1.2 CMO.grexel Main Menu

The main menu displays the list of modules that are accessible to the user. Table 2-1 gives a brief description of each module listed in the main menu.

Note: This manual covers **all the functionalities** provided for the AH Root users. However, the options available to the users are based on the roles assigned to them and on the Domain configurations. Refer to Chapter 3 for information about the access permissions defined for different roles.

Table 2-1 – Modules in the Main Menu

Main Menu / Modules	Functions
Home	The start-up page of the application that is displayed when you log in to the application.
EECS-GO	The sections to manage the Accounts of the Account Holder and to Transfer and Cancel certificates to other Accounts of the same Domain or to other Domains. Provides also options to create different Transaction reports and to see details of Certificate Bundles on the Accounts.
Reports	Covers the options of generating private reports of the Activity Log of Transactions and modifications.

Users	Covers the options to create and manage the Users of the Account.
Plants	Covers the process of registering Production Devices to the system and aggregating Meter Readings.
My Page	Covers the options to maintain the organization details and settings.
Support	In this section, relevant information about the system is provided (e.g. user manuals, tips & tricks). And you can and initiate a support case using the support portal https://grexel.kayako.com. Or contact your issuing body.

2.1.3 Report viewer functions

Figure 2.3 shows the report viewer toolbar that provides navigation, search and export functions to help you work with reports in CMO.grexel. The different icons and their functions are presented in Table 2-2.

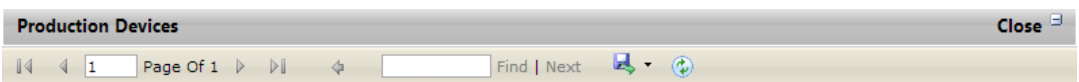
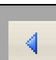
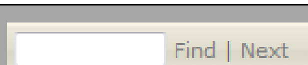


Figure 2.3 – Report viewer

Table 2-2 – Report viewer functions

Icon	Description
	**First Page**: Navigate to the first page of the report.
	**Previous Page**: Navigate to the previous page.
	**Next Page**: Navigate to the next page.
	**Last Page**: Navigate to the last page of the report.
	**Go back to the parent report**: Navigate to the parent report.
	**Find Text**: Search text from the entire report. (Note: not available on Firefox.)
	**Export**: Select from the dropdown list to export the report in Excel or PDF format.
	**Refresh**: Refresh the current page.

2.1.4 Expandable Bands

When navigating through CMO.grexel, sections are organized in bands (headers for sections). They can be expanded or hidden depending of users' preferences. Figure 2.4 displays a band example. Click **Open** to expand a band or **Close** to hide it.

Figure 2.4 – Expandable Bands

2.1.5 Useful keyboard shortcuts

Table 2-3 lists some useful key combinations that may facilitate the use of the CMO.grexel application.

Table 2-3 - Keyboard shortcuts

Key combination	Description
Enter	Activate focused button, menu item, e.g. search request.
Ctrl - Click	Select multiple choices in list boxes.
Alt Gr - Click	Unselect choices in list boxes.
Tab	Navigate to the following field.
Shift - Tab	Navigate to the previous field.

2.2 Pending Tasks

The CMO.grexel application provides a quick link to handle some of the frequently used approval procedures on the start-up page. The start-up screen (Figure 2.2) lists the pending tasks that await the action of the user who has logged in. Tasks are created for example for the confirmation of a Transfer.

The system can communicate with users by email about certain pending tasks that need the user attention. See Chapter 2.3 for more information.

On completion of the task, it is removed from the list.

Note: The pending task list might not be exhaustive.

2.3 Alerts and Email Subscription*

Notes: *Alerts and Email Subscription are **domain specific** functionalities, and may not be available in your domain. Please contact your Issuing Body to know more.

The alert is visible on the home page and lists alerts that are relevant to user role. Additionally, user may subscribe to email notifications of the alerts. See Figure 3.1 for roles and permissions.

At the home screen (Figure 2.2) a user can see an alert list related to certain activities that take place in the system. Alerts are created for the following activities:

- **PD Alerts:** When a Production Device of the organization is approved by the Issuing Body.
- **Transfer Pending:** When a certificate transfer is initiated by a user with Account Viewer rights. Such transfers need the AH Root's or the AH Account Administrator's approval and an alert is created to notify these users that such transfer is pending approval. See Chapter 6.4.4 for more information on Four Eye Approval of Transfers.
- **Incoming Transfers:** When the Account Holder receives certificates from another Account Holder that belongs to the same Domain (Transfer) or to another Domain (Import)
- **Cancellation Alerts:** When Cancellations made by your Account Holder are approved or rejected by the Issuing Body

A user can choose whether or not to be notified about the new alert by email. To subscribe to email notifications:

1. Navigate to **Users > Subscribe Alerts.** The Subscription List will appear (Figure 2.5).
2. Select the alerts activities that you would like to receive by email. See Table 2-4 for a description of each list.
3. Click **Save**
4. An email alert will be sent to the user email address when such activity happens in the system (See Figure 2.6 for an email notification example).

Note: The alerts available for subscription depends on the user role and permissions. See Figure 3.1

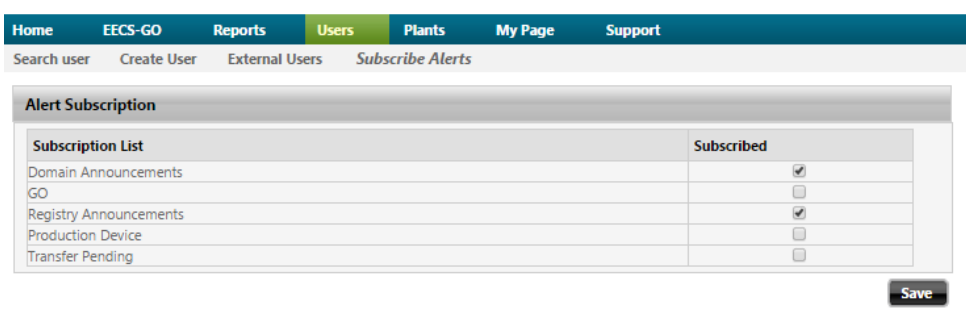


Figure 2.5 – Subscribe to Alerts

Table 2-4 – Subscription List

Key combination	Description
Domain Announcements	When the Issuing Body of the domain creates a new announcement. The announcement is seen in the home screen under Domain Announcements section.
GO	When your Account Holder receives certificates from another Account Holder that belongs to the same domain (Transfer) or to another Domain (Import) When Cancellations made by your Account Holder are approved or rejected by the Issuing Body
Registry Announcements	When the Registry Operator (Grexel) creates a new announcement. The announcement is seen in the home screen under Registry Announcements section.
Production Device	When a Production Device of the organization is approved by the Issuing Body
Transfer Pending	When a certificate transfer is initiated by a user with Account Viewer rights. Such transfers need the AH Root's or the AH Account Administrator's approval and an alert is created to notify these users that such transfer is pending approval. See Chapter 6.4.4 for more information on Four Eye Approval of Transfers.

A transfer of 5 certificates to account XX_TEST_Test AH01 on 2015-01-28 15:54:23 is pending for your approval

Note: This is an automatic alert from cmogrexeltest. If you do not want to receive alerts any more, please log in to cmogrexeltest and modify your settings accordingly under Users / Subscribe Alerts.

Figure 2.6 – Email notification example

3 MANAGING USERS

This chapter describes the roles and the responsibilities assigned to the users of the Account. In addition, this chapter introduces the options provided under the **Users** module for creating and managing users for the Account.

3.1 Roles and Responsibilities

CMO.grexel has various user authorization levels for Account Holders. Specific responsibilities related to the use of CMO.grexel are identified and assigned to the predefined role(s) and the appropriate roles are assigned to the users so that a user can have one or several roles. Figure 3.1 lists the different roles and the access rights assigned to them. The Account Holder Root User has the highest access to the system.

Note: Some of the functions are Domain/actor dependent and might not be available for you even if they are listed in Figure 3.1. These functions are denoted by an asterisk (*).

An organization may have many users with similar roles. For error prevention, user rights should be assigned on a need basis, not granting a user with more rights than necessary.

	AH Account Administrator	AH Account Viewer	AH PD Administrator	AH PD Editor	AH PD Viewer	AH Root	AH User Administrator
Home	**x**	**x**	**x**	**x**	**x**	**x**	**x**
Alerts List *	x	x	x	x	x	x	
Domain Announcements*	x	x	x	x	x	x	x
EECS-GO	**x**	**x**				**x**	
Manage Accounts (EECS-GO)	x	x				x	
Perform changes in the account	x					x	
Account Statement (EECS-GO)	x	x				x	
Search Certificates (EECS-GO)	x	x				x	
Search Transactions (EECS-GO)	x	x				x	
Initiate Transactions (EECS-GO)*	x	x				x	
Commit Transactions (EECS-GO)	x					x	
Transfer Approval (EECS-GO)*	x					x	
PD Transactions Summary (EECS-	x	x				x	
REPORTS	**x**	**x**	**x**	**x**	**x**	**x**	**x**
Activity Log	x	x	x	x	x	x	x
Cancellation Statements*	x	x	x	x	x	x	x
Issuing Statistics	x	x	x	x	x	x	x
USERS	**x**	**x**	**x**	**x**	**x**	**x**	**x**
Search User						x	x
Edit User						x	x
Create User						x	x
External Users						x	x
Subscribe to Alerts*	x	x	x	x	x	x	x
PLANTS			**x**	**x**	**x**	**x**	
View PD details			x	x	x	x	
Change Issuing Account			x	x		x	
Edit PD			x			x	
Register PD*			x	x		x	
Initiate PD registration*			x	x		x	
Confirm PD registration*			x			x	
MR Declaration*			x	x		x	
View Declaration*			x	x		x	
Add Declaration*			x	x		x	
View Meter Readings			x	x	x	x	
Manage Meter Readings*			x	x		x	
Search Meter Readings*			x	x		x	
Add Meter Readings*			x	x		x	
License Expiration Date			x	x	x	x	
Issuing Request*						x	
MY PAGE						**x**	
Manage My Organization						x	
Account Holder API*						x	
Invoice Report*						x	
SUPPORT	**x**	**x**	**x**	**x**	**x**	**x**	**x**
User Manual	x	x	x	x	x	x	x
Contact Us*	x	x	x	x	x	x	x

Figure 3.1 - Roles and Access provisions for the modules

3.2 Viewing the Users List

Note: This feature is available only for the roles **AH Root** and **AH User Administrator.**

To view the list of users in your Organization,

1. Navigate to the **Users** module on the Main Menu. By default, the search criteria band is expanded. By clicking **Search**, a list of all the users of your Organization is opened (Figure 3.2). The descriptions of the fields are listed in Table 3-1
2. The toolbar above the list concerns the whole result set. It has page navigation, Zoom in and out, Find, Export and Refresh functionalities.
3. You can use the **Edit** link to perform the respective actions.
4. To Export the details of all the pages to an Excel sheet or a PDF file, select the respective option and click the **Export** button.

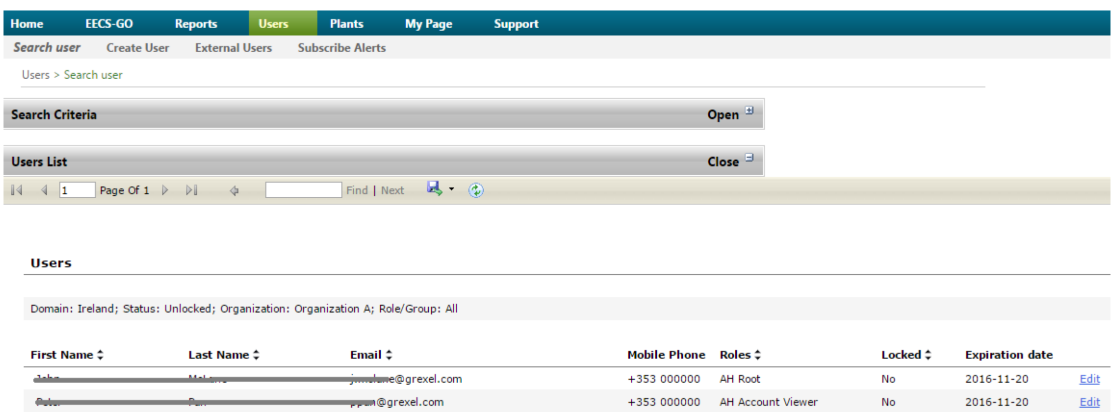


Figure 3.2 – Viewing the Users list

Table 3-1 – Details displayed in the Users List

Name	Description
First Name	First name of the User
Last Name	Last name of the user
Email	Email name assigned to the user
Mobile Phone	The mobile phone of the user
Roles	Role(s) assigned to the user
Locked	Information about the Locked status of the user. Locked users cannot login to the system.

Expiration Date	Date when the client certificate to access CMO.grexel private site will expire. Unless the certificate is reset, the user will not be able to login to the system after this date. To reset a client certificate, click on **Edit** link. See Retting User Credentials.
Action links	
Edit (link)	Click this link to Edit the user details

3.3 Searching Users

Note: This feature is available only for the roles **AH Root** and **AH User Administrator.**

The Search option is provided to filter the user list by using one or more conditions:

1. Navigate to **Users>Search User.**
2. Define a single condition or multiple conditions by filling in the necessary field(s). By default unlocked status is selected (Figure 3.3 and Table 3-2).
3. Click the **Search** button to display the filtered users list below the Search Criteria band.

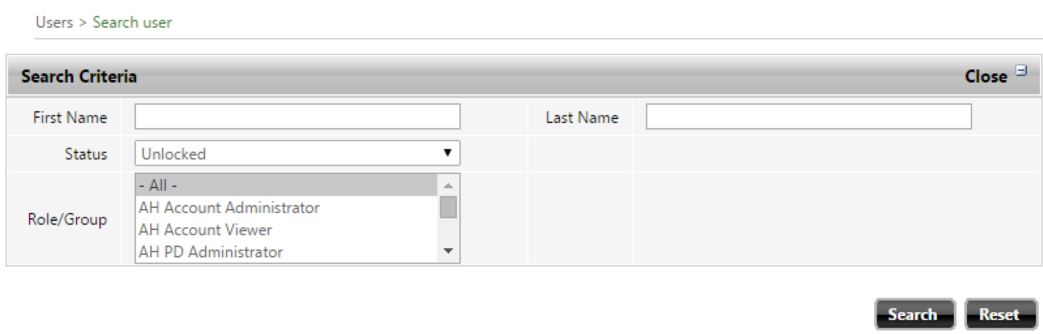


Figure 3.3 – Search Users: search criteria

Table 3-2 – Search Users: search criteria

Name	Description
First Name	Enter the First Name or a string (wild string) to filter the users list and locate the users whose First name contains the string
Last Name	Enter the Last Name or a string (wild string) to filter the users list and locate the users whose Last name contains the string
User Status	Search and filter the list based on the status of the user. By default Unlocked is selected. Locked users cannot login to the system.

Roles	Select one or more Role(s) from the drop down list to view the list of users who have the selected Role(s) (see Figure 3.1 for the different access rights).
Action links	
Search	Click to invoke the search and display the filtered user list.
Reset	Click to reset the screen to enter new search conditions.

3.4 Creating New Users

Note: This feature is available only for the roles **AH Root** and **AH User Administrator.**

Account Holder users assigned with roles AH Root or AH User Administrator can create new users to the Account with different roles. Refer to Figure 3.1 for possible user roles.

1. Navigate to **Users>Create User** (Figure 3.4).
2. Enter the details of the user to be created (Table 3-3).
3. Click **Create** to save the details. Once the user is created, the client certificate is sent to the user via email and the private key, via SMS.

Note: The client certificate and/or pin code should never be forwarded or otherwise disclosed to anyone else than the original recipient of this information.

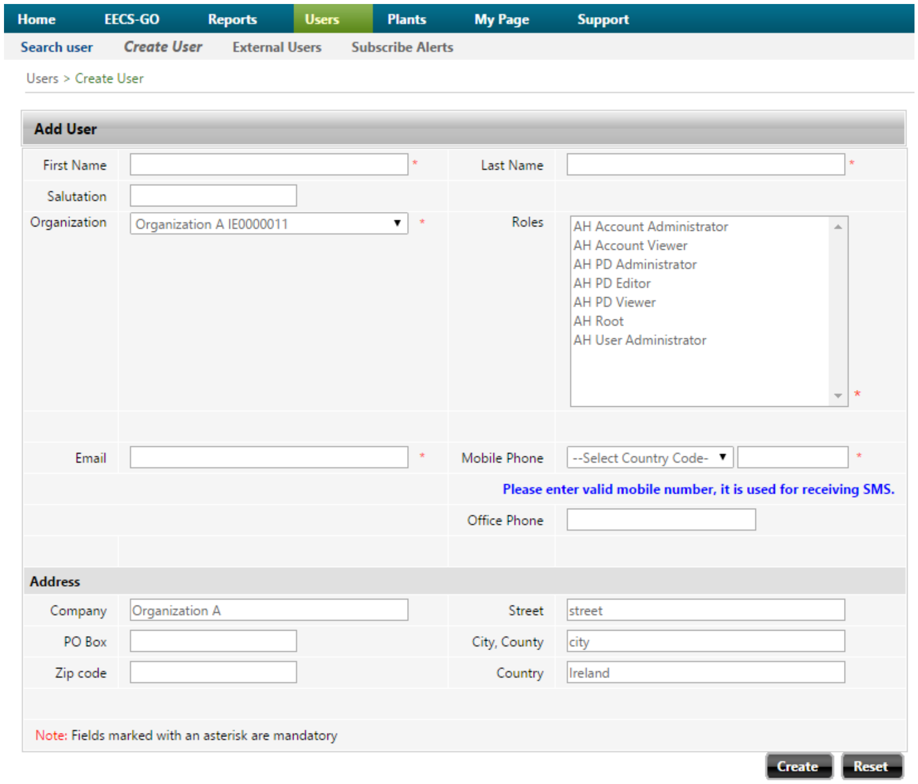


Figure 3.4 – Creating a New User

Table 3-3 – New user details (mandatory fields marked with *)

Field Name	Description
First Name*	Enter the First Name of the user.
Last Name*	Enter the Last Name of the user.
Salutation	Enter the proper salutation of the user.
Organization*	Select your Organization from the drop-down list. The Organization cannot be changed.
Roles *	Select one or more Role(s) from the drop down list to be assigned to the user (use the Ctrl-key to select several roles).
Email *	Enter the email address. The client certificate will be delivered to this address.
Mobile Phone*	Enter the mobile phone number. The SMS containing the client certificate's password will be delivered to this number.
Office Phone	This field is domain specific and might not be visible in your domain. Enter the Office phone number of the user.

Company, Street, PO Box, City, County, Zip code, Country	Enter the relevant address details (Organization address is given as default).
Action links	
Create	Click this to save the details and create a new user. If the entries are valid, the new user is created and a suitable message is displayed. If the mandatory fields are not entered, the system displays an error message and the new user is not created.
Reset	Click this to reset the screen to enter new user details.

3.5 Editing User Details

Note: This feature is available only for the roles **AH Root** and **AH User Administrator.**

If the user has Edit rights to the **Users** module, the users list is displayed with the **Edit** link (Figure 3.2).

1. Click the **Users** module link on the Main menu. Define one or multiple search conditions and click **Search** to display the filtered user list.
2. Click the **Edit** link of the user whose details need to be edited. The Edit user details screen is displayed (Figure 3.5).
3. Carry out the changes.
    a. To lock the user, enable the **Locked** checkbox.
        i. The client certificate of the locked user will be revoked and added to the Certificate Revocation List (CRL).
        ii. The locked user will not be able to access the application.
        iii. Upper level users will not be able to use the ‘Log in as’ functionality for locked users.
    b. To unlock the user, uncheck the Locked checkbox. When you unlock a user, a new client certificate and password will be sent to this user and to be able to login, the user needs to install the certificate in his/her computer
4. Click **Update** to save the changes or click **Cancel** go back to the users list.
5. By clicking **Reset Certificate**, a new access certificate and password will be sent to the user. See Resetting User Credentials

Note: Deleting a user is not possible because it would mean losing all activities records related to this user. Instead, you can simply lock a user. Any locked user will not be able to login to the system.

Users who seize to need access to the registry under the AH Organization should be locked promptly by another user of that Account Holder organization.

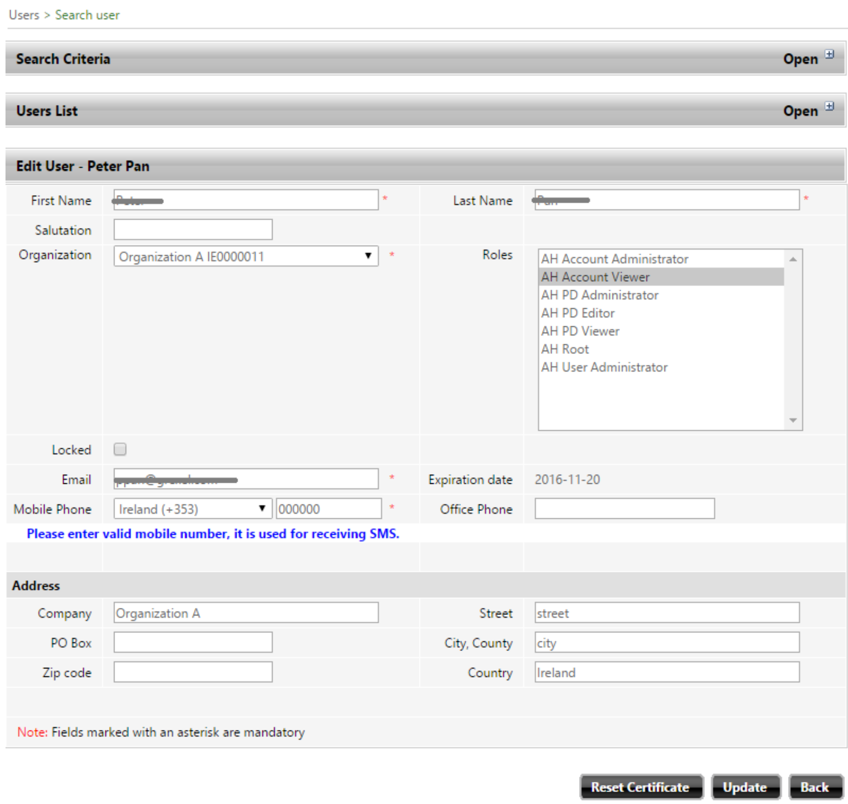


Figure 3.5 – Editing user details

3.5.1 Resetting User's Credentials

If a client certificate is about to expire (expiration date is given on user's details), users should reset their credentials so they can continue logging to CMO.grexel.

Users can reset their user credentials by having an administrative user reset them in the user details. Upon resetting the client certificate, the current client certificate is revoked, a new certificate is created and sent to the user's email address, and a new private key is sent to the user as an SMS.

Note: This feature is only available for the roles **AH Root** and **AH User Administrator**.

1. To reset the login credentials of another user of the same Account Holder, log in as an AH Root or AH User Administrator and navigate to the user details of the user in question: **Users>Search User>Edit.**
2. Click the **Reset Certificate** button and approve the action.
3. Upon resetting the client certificate,
    - The current client certificate is revoked;

- a new certificate is created and sent to the user's email address;
- a new private key is sent to the user as an SMS.

Note: The client certificate and/or pin code should never be forwarded or otherwise disclosed to anyone else than the original recipient of this information.

Users who seize to need access to the registry under the AH Organization should be locked promptly by another user of that Account Holder organization. See Chapter 3.5 for information on how to Lock a user

3.6 Granting permissions to external users

Note: This feature is only available for the roles **AH Root** and **AH User Administrator**.

Users with specific roles can grant permission to other users from other organizations to access your organization. These users are called external users and they will be able to perform activities in your organization according to access rights given to them.

3.6.1 Creating external users

1. Navigate to **Users>External Users.** If no external users have yet been created, the **Create External Users** screen is visible by default. If external users already exist, click the **Create External User** link.
2. Enter the email address of the external user, select the roles to be assigned to the user within your organization and click **Add**. If a user with the given email address exists in the system, an external user is created. If a user (primary or external) with the same email is already linked to the current Account Holder, an appropriate error message is shown.

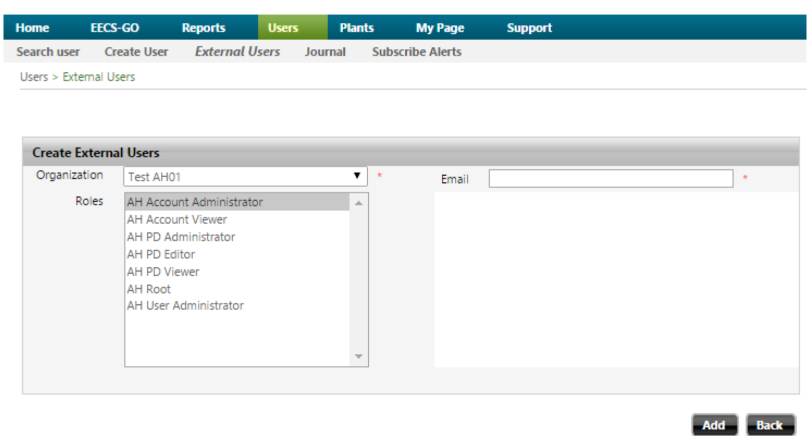


Figure 3.6 – New External User

3.6.2 Editing an external user

1. Navigate to **Users>External Users.** If external users already exist, click the **Edit** link. The Edit External User details screen is displayed
2. Carry out the changes in the roles to be assigned to users and click **Save**

3.6.3 Removing external user grants

1. Navigate to **Users>External Users.** A list of the external users of the Account Holder should be displayed with user information.
2. Select the external user from which you wish to remove the permission and click **Remove.** You will be asked to confirm the removal. Upon confirmation, the external user will not be able to log in to the Account Holder, but will still be able to log in to the other Account Holders it has access to.

Note: External users who seize to need access to the registry under the AH Organization should be removed promptly by a user of that Account Holder organization.

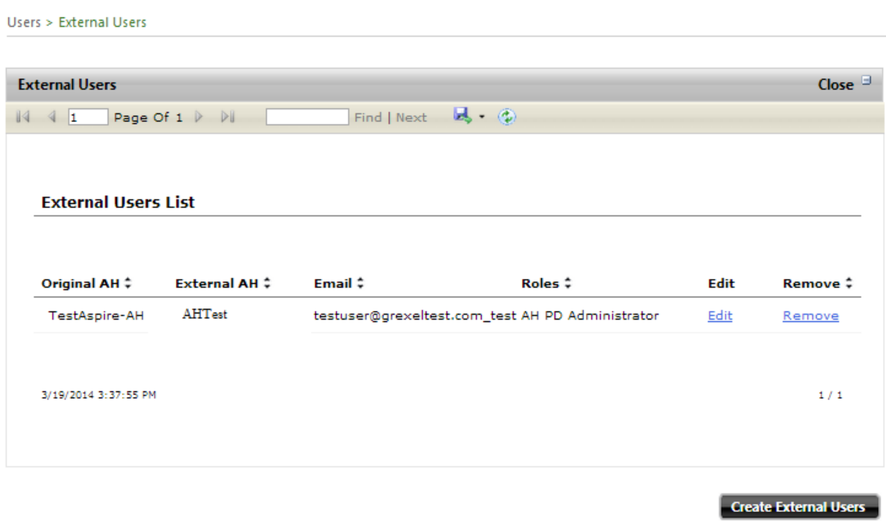


Figure 3.7 – Remove external user permission

3.6.4 Logging in as an external user

Note: External users cannot log into lock Organizations.

If you have external user permission to another organization:

1. Login normally to your account.

2. At start up page (**Home**), select the Account holder where you want to login to at "Login To" area, as in Figure 3.8.
3. Select the Account Holder where you want to login and click **Login.**

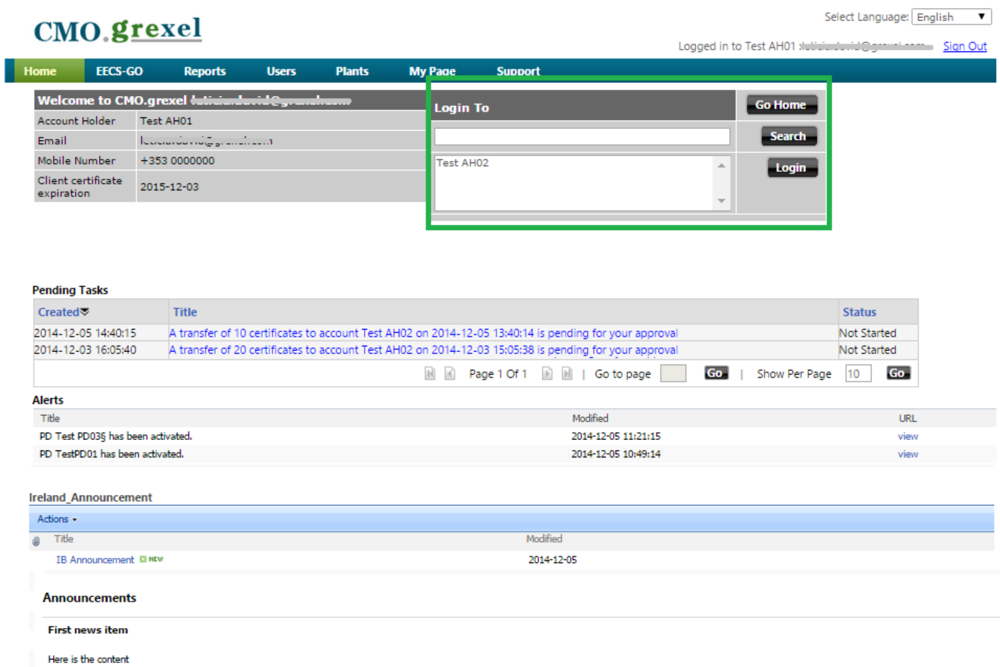


Figure 3.8 – External User Selection Screen

It is possible to see to which account you are logged in to at the up-right corner of the screen. It reads "Logged in to [AH name].

After being logged in to one External Account holder, it is possible to return back to the original Account Holder by selecting **Go Home** on Home page. Once back to the original Account Holder it is possible to login to another External Account holder or continue to work within the original Account Holder.

4 MANAGING THE ORGANIZATION

Note: This module is available only for the **AH Root** role. Refer to Figure 3.1 for the access rights of different Account Holder users.

This chapter refers to the option to manage your Organization information. This function is provided under the **My Page** module.

4.1 Manage Your Organization

To manage your Organization details:

1. Click the **My Page** module link on the Main menu. By default, **Manage My Organization** is selected and details of your Organization are displayed (Figure 4.1 and Table 4-1).
2. The details are divided into two pages. The first page shows general information of the Organization and Organization Licenses (Figure 4.1). The second page shows contact details.
3. You can Export the details to an Excel sheet or a PDF file by selecting the respective option and clicking the **Export** button.

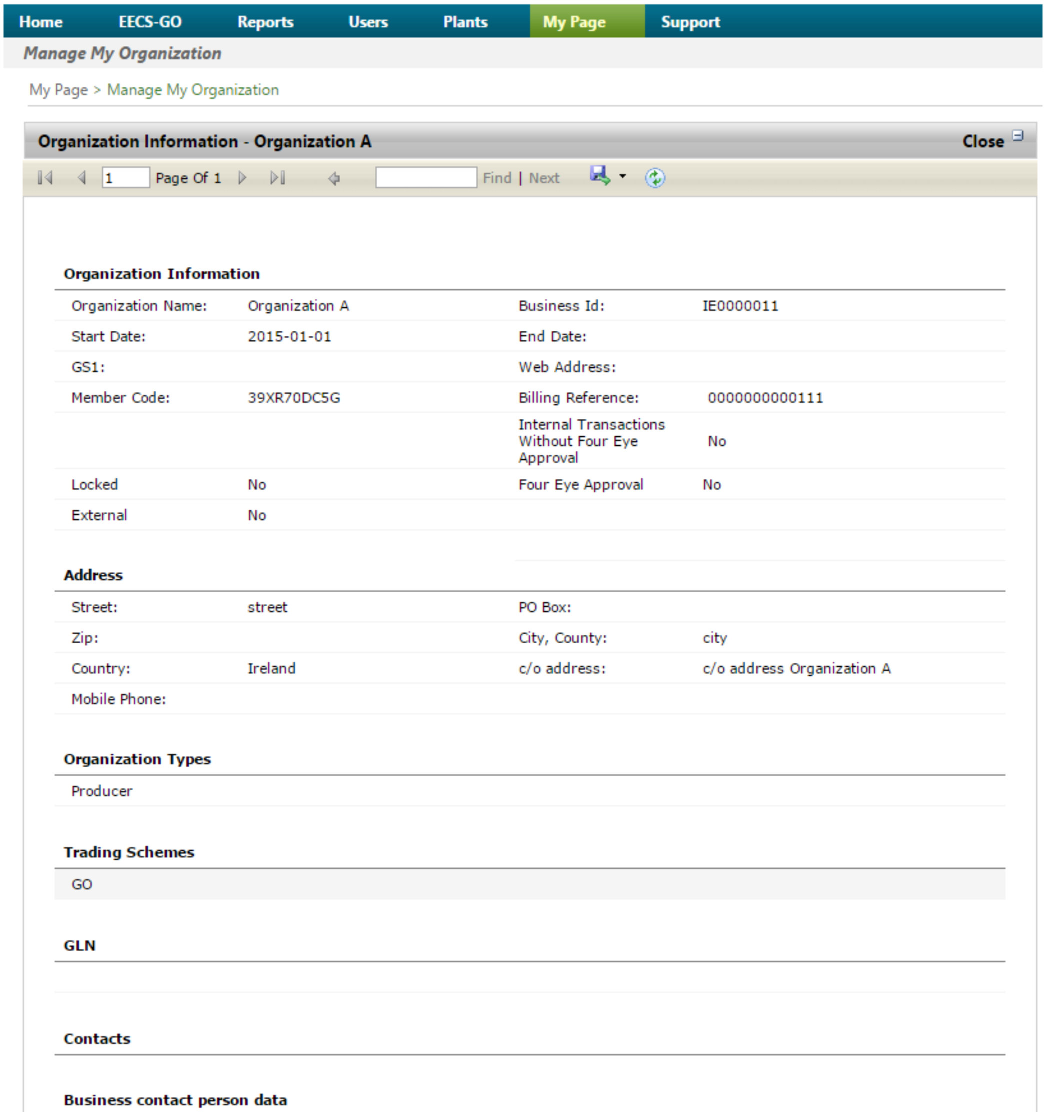


Figure 4.1 – Organization and its License details

Table 4-1 – Viewing Organization details

Field Name	Description
Organization Information	Figure 4.1 displays the general details of the Organization including its License details. See Table 4-2 for details.
Business Contact, Technical contact and Invoice Contact details	The Business Contact, Technical contact and Invoice Contact details of your Organization
Action links	
Edit	Click this to edit the details of the Organization (Chapter 4.2).

4.2 Editing Organization Details

Note: Only an AH Root user can modify the Organization details.

The access to modify the details of the Organization depends on the Domain settings. The editable fields are displayed as white boxes and the non-editable fields as grey boxes.

1. Click the **My Page** module link on the Main menu.
2. By default, the **Manage My Organization** option is selected and details of your Organization are displayed (Figure 4.1).
3. Click the **Edit** button to edit the details of the selected Organization.
4. The **Edit Organization** screen (Figure 4.2) is displayed. The details are presented as separate tabs showing General information tab as default. Next, each tab is described sequentially in this document.

Note: Mandatory fields are marked with an asterisk (*) and may vary depending on your domain configuration. If these fields are left empty, the system displays an error message

5. Click **Update** on the bottom of the screen to save the details of all the tabs.

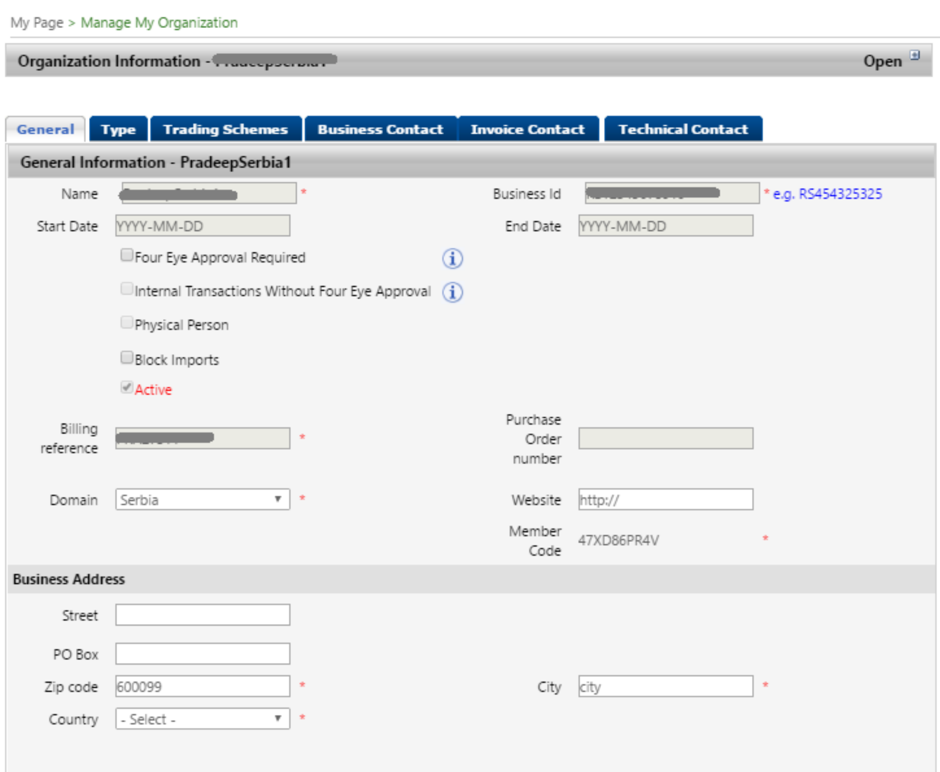


Figure 4.2 – Editing the general details of your Organization

4.2.1 Editing General Information

1. Navigate to **My Page>Manage My Organization>Edit>General**
2. You can modify the editable fields in the General details of the Organization (Table 4-2).

Table 4-2 – Editing General Information

Field Name	Description
Name	Name of the Organization. **Note**: This field might not be editable depending on your domain configurations
Business/Person Id	Unique Business Id of the Organization/Person Id of the person. This Id should consist of the Country code (first 2 letters) followed by characters e.g. DK234A556. **Note**: This field might not be editable depending on your domain configurations
Start Date	Start date of the Organization. Not editable.
End Date	End date of the Organization. Not editable.
Four Eye Approval Required	**Note:** This is a domain specific functionality and might not be available in your domain. Please contact your Issuing Body to know more. Account Holders can choose to have an extra approval for Certificate transactions before they are performed. When this is selected, users with AH Account Viewer roles can initiate transactions, which have to be approved by AH Root - or AH Account Administrator users before they are performed. See Chapter 6.4.4 for further information on approving transfers.

Internal Transactions Without Four Eye Approval	When selected, this parameter enables user with AH Account Viewer roles to perform internal transactions **without** four eye approval. **How does it relate to Four Eye Approval Required parameter?** • If “Four Eye Approval Required” is disabled and “Internal Transactions without Four Eye Approval” is disabled, the AH account viewer user is not able to make any transactions • If “Four Eye Approval Required” is enabled and “Internal Transactions without Four Eye Approval” is disabled, the AH account viewer user is able to initiate transactions but Four eye approval is required • If “Four Eye Approval Required” is disabled and “Internal Transactions without Four Eye Approval” is enabled, the AH account viewer user is able to make only internal transfers without four eye approval • If “Four Eye Approval Required” is enabled and “Internal Transactions without Four Eye Approval” is enabled, the AH account viewer user is able to initiate transactions, but only internal transfers are completed without Four Eye Approval Required
Physical Person	Indicates whether or not the Organization is a private person. Not editable.
Active	Refers to the status of the organization: active or not. Not editable.
Billing reference	Invoicing system reference if invoice is enabled in the domain. Not editable. **Note**: This field might not be editable depending on your domain configurations
Block of Imports	Defines whether the Organization is able to block certificates imports. Select the check cox to blcok certificates imports **Note:** * Block of Imports is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.
Purchase Order Number (PO Number)	**Note:** This field is Domain specific and might not be visible in your domain. Please contact your Issuing Body to know more. Space for additional identification number. Can be used e.g. to give a specific reference number for the invoices
Domain	The Domain of the Organization. Not editable.
Website	The Website of the Organization.
Member Code	The Member Code in the system given by the Issuing Body. Not editable.

Street, Post Box, City, County , Zip Code , Country	Address of the Organization. Some fields might be mandatory depending on your domain configuration. If they are marked with an asterisk, they are mandatory.
Action links	
Update	Click this to save the details on all the tabs. If the mandatory fields are not entered, the system displays an error message and the details are not saved.
Back	Click this to cancel the edit and return to the My Organization Details page.

4.2.2 Viewing the Organization Type

1. Navigate to **My Page>Manage My Organization>Edit>Type**.
2. View the type of your Organization.

An AH cannot edit Organization's Type. Contact the Issuing Body for information.

4.2.3 Viewing Trading Scheme Details

1. Navigate to **My Page>Manage My Organization>Edit>Trading Schemes.**
2. The list of the pre-defined Trading Schemes is displayed (Figure 4.3).

AH cannot edit Organization's Trading Schemes. Contact the Issuing Body for information.

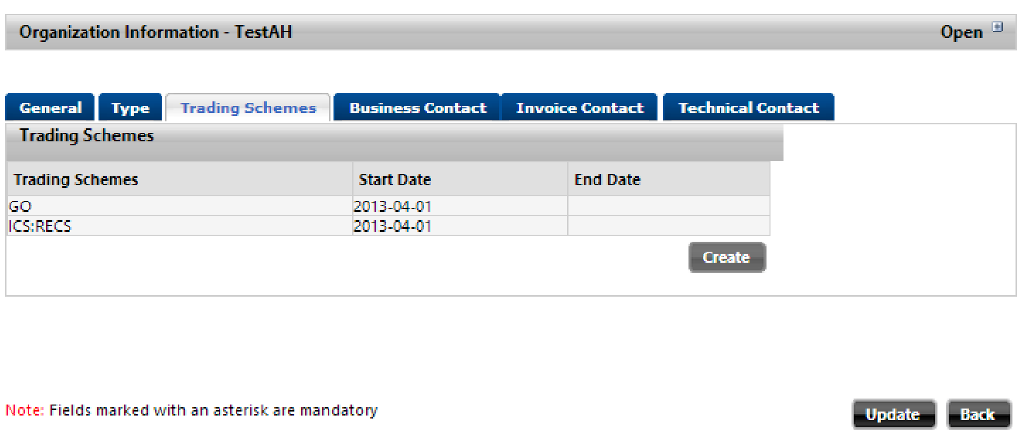


Figure 4.3 – Viewing Trading Scheme Details

4.2.4 Editing Business Contact Details

1. Navigate to **My Page>Manage My Organization>Edit>Business Contact** (Figure 4.4)**.**

2. Modify the editable fields in the Business Contact details.
3. Click **Update** to save the details. If all mandatory fields are not entered, the system displays an error message and the details are not saved.

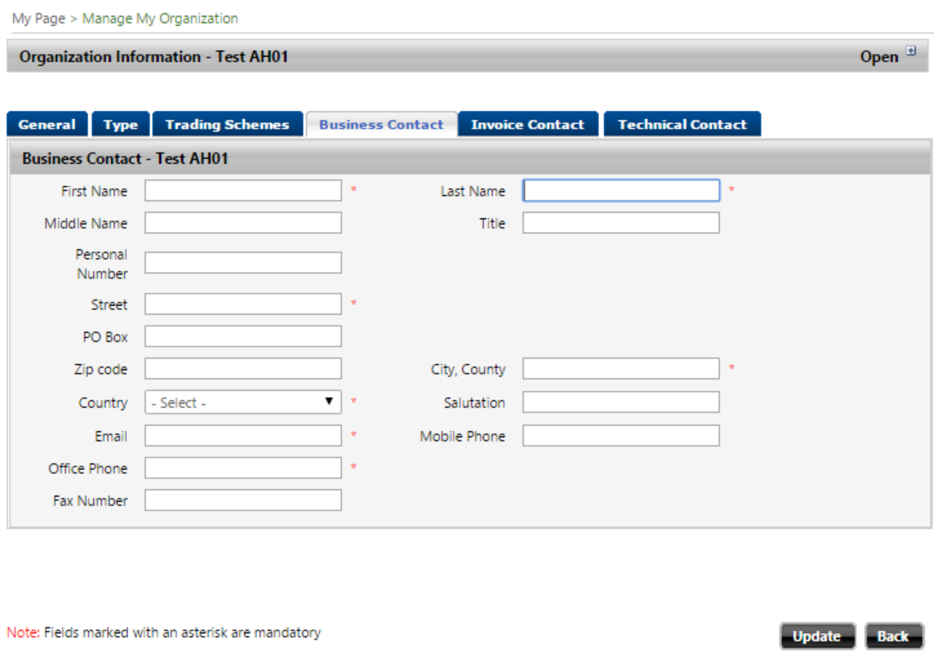


Figure 4.4 – Business Contact details

4.2.5 Editing Invoice Contact Details

1. Navigate to **My Page>Manage My Organization>Edit>Invoice Contact**.
2. The Invoice Contact details tab is similar to the Business contact tab.

4.2.6 Editing Technical Contact Details

1. Navigate to **My Page>Manage My Organization>Edit>Invoice Contact.**
2. The Technical Contact details tab is similar to the Business contact tab.

4.3 Account Holder API*

Notes: * Account Holder API is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.

If Account Holder API is enabled in your domain, it is only available for AH Root users.

An Account Holder can have read access to Accounts, Certificates, Transactions and Schedules via API. For that it can decide to enable an API user.

When an account holder wants to enable API, the AH root user switches it on. The API user will receive a certificate and with it, he can perform anything (that API enables) under that AH. For enabling the API for an Account Holder:

1. Navigate to **My Page>Account Holder API**
2. Insert the email and mobile number to where the certificate and password should be sent to and select **Enable API**.

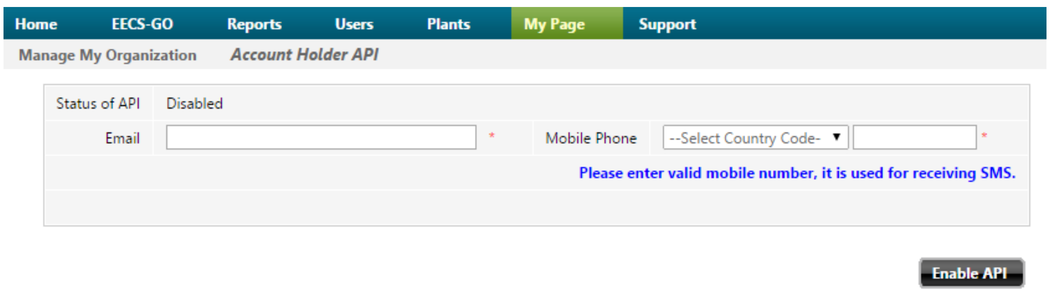


Figure 4.5 – Account Holder API

The AH Root User can reset the client certificate for the API by clicking **Reset Client Certificate** ([Figure 4.6]()).

For disabling the API for an Account Holder, select **Disable API**.

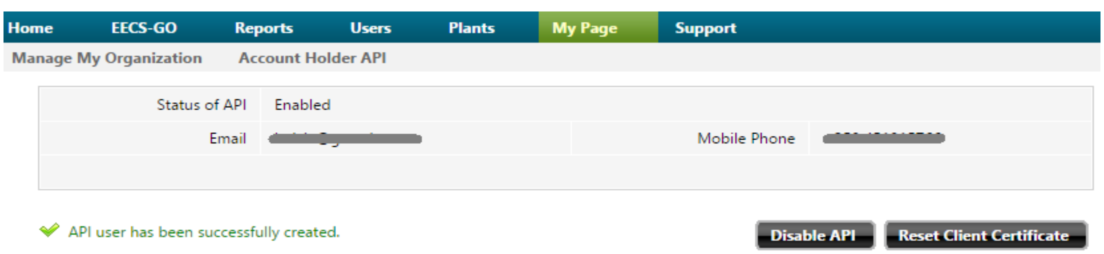


Figure 4.6 – Reset/Disable Account Holder API

Account Holder API is 'RESTful' web service using OData protocol. (see http://www.odata.org)

For more information on CMO.grexel API Model, see Account Holder API User Manual document. There you find information on how to access CMO.grexel API OData service, metadata end description for each of the entries (Accounts, Transactions, Certificates, TransactionCertificate and Schedule).

4.4 Invoice Report*

Note: * Invoice Report is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.

This feature is only available for user with the **AH Root** role

Under **My Page>Invoice Report** Account Holders can view and search for their Invoice Reports.

1) Navigate to **My Page>Invoice Report** (Figure 4.7)
2) Fill the search criteria and click **Search** to display the filtered invoice list (Figure 4.8)
3) You may click on the **Invoice Date** link to view details of the invoice (Figure 4.9)
4) You can Export the details to an Excel sheet or a PDF file, by selecting the respective option when clicking the **Export** button 

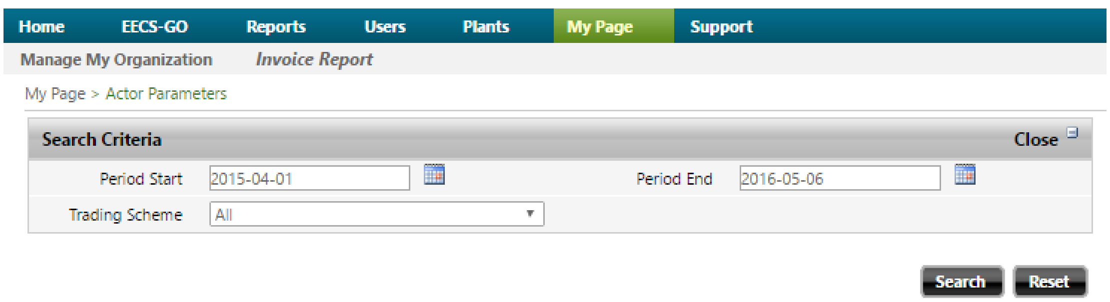


Figure 4.7 – Invoice Report: Search Criteria

Table 4-3 – Table of Action Key

Name	Description
Period	Period to which the invoice refers
Trading Scheme	Guarantees of Origin is the only available option in CMO.grexel
Action links	
Search	Search invoices according to the selected criteria
Reset	Sets the values back to the previous status

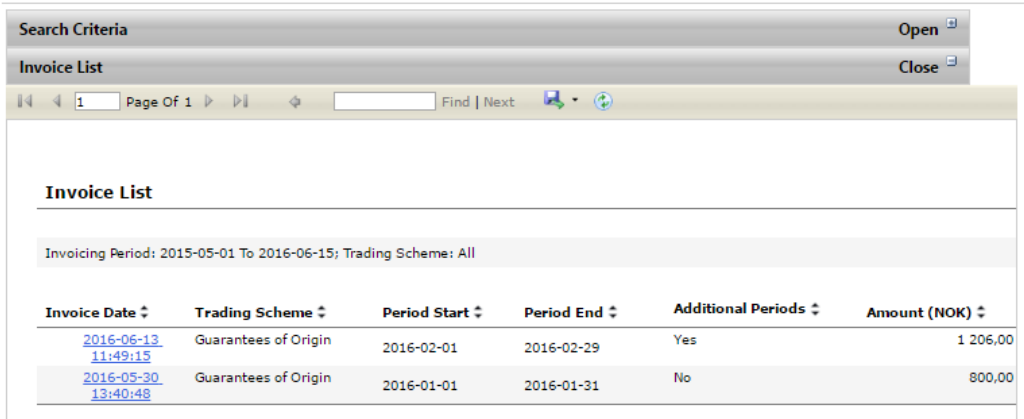
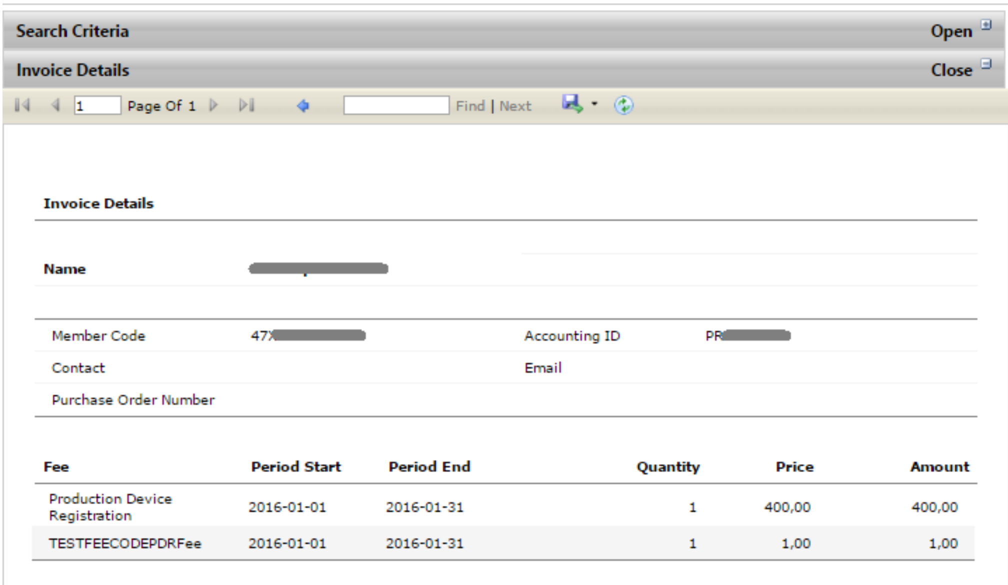


Figure 4.8 – Invoice Report list

Table 4-4 – Invoice List Field descriptions

Name	Description
Invoice Date	The date when the invoice was created. Click the link to open the Invoice's details
Trading Scheme	Certificate scheme to which the Invoice refers. Guarantees of Origin is the only available option in CMO.grexel
Period Start and Period End	Period of the Invoice
Additional Periods	It shows whether the invoice includes earlier invoice periods (aggregated shares). **Note:** Invoices are created and sent to AH if they are higher than a certain amount. If the Invoice amount is less than the minimum, the amount is collected for next period and will be invoiced only when the total sum is above this minimum amount. The minimum amount is set by your Issuing Body (IB). Please contact your IB to enquire more.
Amount	Amount of the Invoice. The currency depends on the Domian that you are logged in. Please contact you Issuing Body in case of questions.



Search Criteria Open

Invoice Details Close

1 Page Of 1 Find | Next

Invoice Details

Name	[redacted]		
Member Code	47[redacted]	Accounting ID	PR[redacted]
Contact		Email	
Purchase Order Number			

Fee	Period Start	Period End	Quantity	Price	Amount
Production Device Registration	2016-01-01	2016-01-31	1	400,00	400,00
TESTFEECODEPDRFee	2016-01-01	2016-01-31	1	1,00	1,00

Figure 4.9 – Invoice Report Details

5 RUNNING & MAINTAINING PLANTS

This section describes the process of registering, managing and reporting Production Devices. First, the general workflow of registering and managing PDs is described, after which detailed explanations are given on how these actions are performed in the CMO.grexel application.

Note: Refer to Figure 3.1 for the permissions assigned to the roles for executing the functionalities available under the **Plants** module.

5.1 Workflow Description

An Account Holder with sufficient rights can register a Production Device to the CMO.grexel system in order to receive certificates for the produced electricity of the device. Certificates of the Production Device are issued to the owner(s) of the device. The Account Holder, who registers the device, is called the Registrant.

The workflow for the registration and management of the device is as follows:

1. The Account Holder (AH) registers the Production Device (PD) to the system with all the appropriate information and then sends the form to the Issuing Body (IB) for approval.

Note: Only AH Root and AH PD Administrator users have the permission to submit the Production Device to the Issuing Body. AH PD Editor users can also initiate the registration process but before submitting, confirmation from an AH PD Administrator user or AH Root is needed.

2. On successful completion of the registration and if the PD is approved by the Issuing Body, a new Production Device is ready and certificates can be issued for the electricity produced starting from the Start Date of the Production Device.
3. If allowed in the domain, an Account Holder user with appropriate rights can set Meter Readings for the device through the system, which then need to be approved by the Issuing Body.
    - In case the PD has multiple Fuels, a Declaration is required before the issue of certificates to determine the share of each Fuel. If allowed in the domain, Account Holder user with appropriate rights may submit the declaration for the Issuing Body's approval.
4. The Issuing Body issues certificates according to meter readings.
5. If required, Production Device details can be edited. This edited data should be sent to the Issuing Body for approval. The workflow is similar to registering a new PD.

- If there are changes that have an impact on Certificate issuing like changes to the ownership, the Issuing Body will create a new version of the PD.
- The new versions will have the same GSRN number as the previous version. Each version has a different validity period and unique production periods. The certificates refer to the PD version that was active at the time of the electricity production the certificates were issued for.

6. Account Holders can view and search Production Devices, which they own. All registered and active Production Devices and other general information are also listed in the public Internet page of the system.

5.2 Registering a Production Device

To register a Production Device navigate to **Plants>Register PD**.

The system captures the information on all the characteristics of the device. Navigate through all the eight tabs on the left side menu to complete the process (Figure 5.1).

The registration form can be **saved** at any stage of data entry and completed at a later time.

Note: The saved but not submitted devices are saved with the status Updated. They can be found by using the PD Search and setting the criteria PD Status as Updated.

Mandatory fields are marked with an asterisk (*) and may vary depending on your domain configuration. If these fields are left empty, the system displays an error message

When finished, the registration form should be **submitted** to the Issuing Body. The user is alerted if the validation criteria are not met, i.e. the mandatory fields are not entered correctly.

The Production Device should have at least one Fuel, Meter, Owner and License. By default, the Registrant is the Operator and Owner with 100% ownership. On successful completion of the registration, the system assigns a unique identifier called GSRN to the Production Device. This is used to identify the device in the system. The Action keys common to all tabs are introduced in Table 5-1.

Table 5-1 – Table of Action Keys

Name	Description
Action Keys	
Save	Click to save the details entered in the different tabs.

Submit	Click to submit the form to the Issuing Body for approval. The data is validated. At this stage, the system also validates that the PD ownership adds up to 100%. The application will ask for Confirmation. Without confirmation, the Production Device will not be submitted for approval for the Issuing Body.
Reset	Sets the values back to the previous status.
Next	Click to go to the next tab page.

Refer to Workflow Description for details on the entire registration process.

5.2.1 Details

Navigate to **Plants>Register PD>Details**.

This tab page captures basic production related data about the Production Device (Figure 5.1 and Table 5-2). Some data is domain specific, i.e. it is only shown for the domains that have it enabled.

Note: Mandatory fields are marked with an asterisk (*) and may vary depending on your domain configuration. If these fields are left empty, the system displays an error message

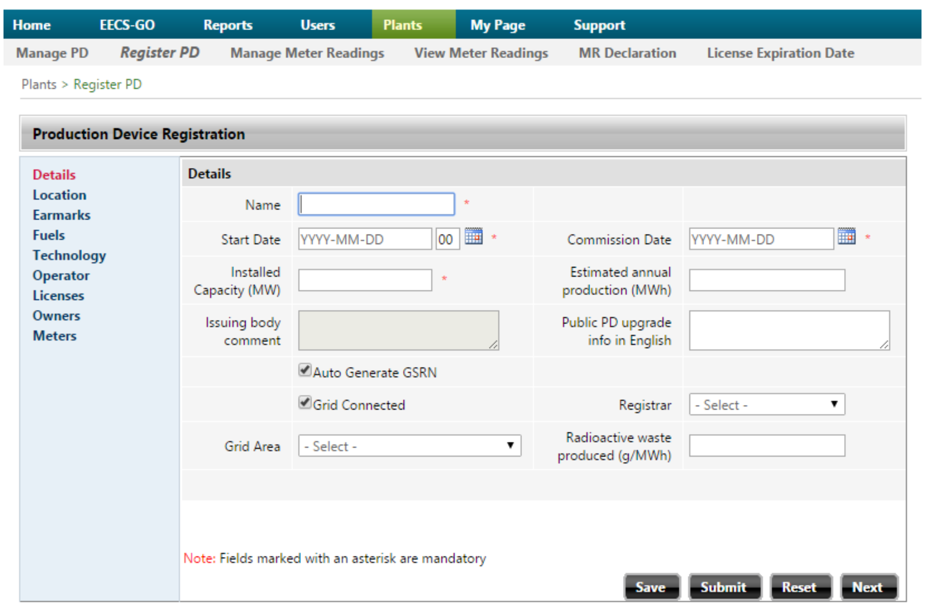


Figure 5.1 – Register PD: Details wizard

Table 5-2 – PD Details: Field Description

Name	Description
Name	The name of the Production Device used in all Transactions.

Start Date	Start date of this version. Issuing can be done from this date on.
Commission Date	Date of commissioning the PD.
Installed Capacity (MW)	Maximum capacity of the PD. Insert value in MW and use comma as decimal point. E.g.: 0,00
Estimated Annual Production (MWh)	Expected Annual production of the PD.
Issuing Body comment	After approval /disapproval of the PD, the IB might add some comments to the registration.
Public PD upgrade info in English	Can be used for additional information about the PD.
Registrar	**Note:** This is a domain specific field Name of the Registrar (auditor or authority) to verify PD details.
Grid Connected	Select this check box if your grid is connected to a public grid.
GSRN Auto Generated	Select to assign a system generated GSRN. If this checkbox is not selected, a GSRN number can be entered.
Grid Description	Description of your grid. This is required only if Grid Connected is not checked.
Grid Area	**Note:** This is a domain specific field Select the area from the drop down list.
Radioactive waste produced (g/MWh)	**Note:** This is a domain specific field Amount of radioactive waste produce by the PD in case of any.

5.2.2 Location

Navigate to **Plants>Register PD>Location**.

This tab page captures the location information of the Production Device (Figure 5.2 and Table 5-3).

Note: Mandatory fields are marked with an asterisk (*) and may vary depending on your domain configuration. If these fields are left empty, the system displays an error message

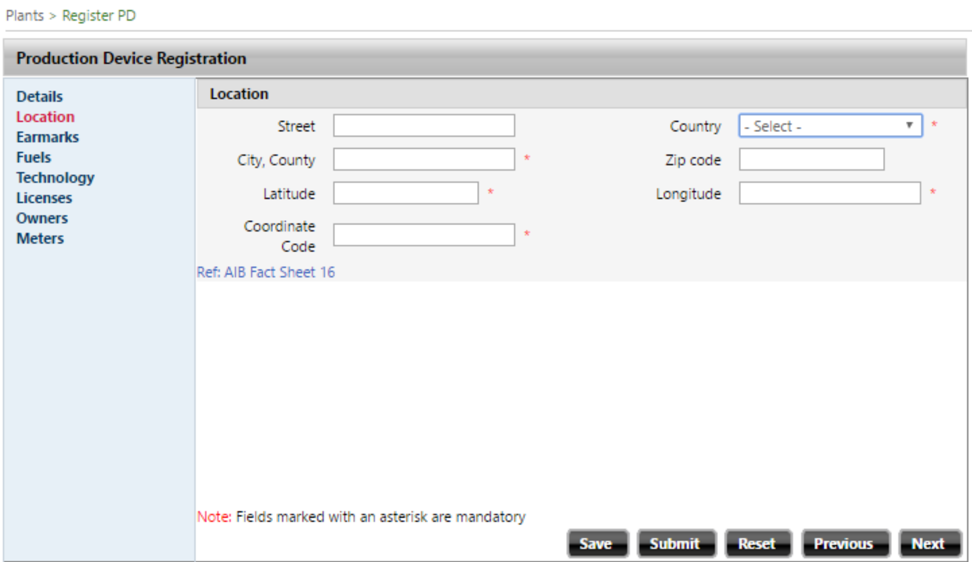


Figure 5.2 – Register PD: Location wizard

Table 5-3 – PD Location: Field Description

Name	Description
Street	Street of the PD location
Country	Country of the PD location
City, County	City or County of the PD location
Zip code	Zip code of the PD location
Latitude	Latitude of the PD location. Enter e.g. Latitude x°x′x″ or Easting xxx xxx E.
Longitude	Longitude of the PD location. Enter e.g. Longitude in x°x′x″ or Northing xxx xxx N.
Coordinate Code	Coordinate Code of the PD location (Ref: AIB EECS Fact Sheet 16). E.g.: WGS84

5.2.3 Earmarks*

Note: *The Earmarks tab is **domain specific**, i.e. it is shown if the domain has it enabled. Please contact your Issuing Body to know more.

Navigate to **Plants>Register PD>Earmarks**.

This tab allows you to assign Earmarks to the Production Device (Figure 5.3). The Earmarks are Domain specific. Only the Earmarks associated with your Domain are available for selection. The

Earmarks of the certificates are determined by these entries. If Earmarks are missing, contact your Issuing Body to check if they can be added to the system.

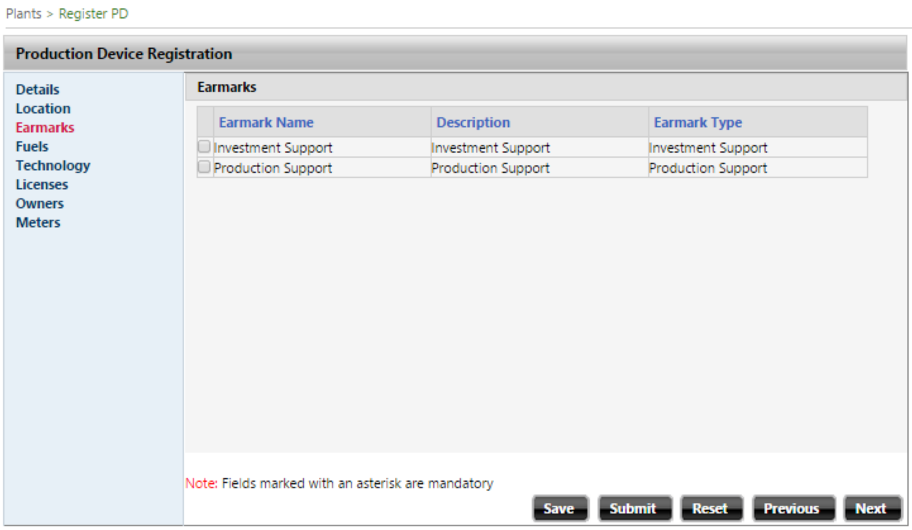


Figure 5.3 – Register PD: Earmarks wizard

5.2.4 Fuels

Navigate to **Plants>Register PD>Fuels**.

On this page, you can select the fuels used by the Production Device (Figure 5.4). The data captured on this tab page depends on the nature of the Production Device. The Fuel codes correspond with those listed in EECS Fact Sheet 5. There are four levels in the hierarchy: please select the most accurate description(s).

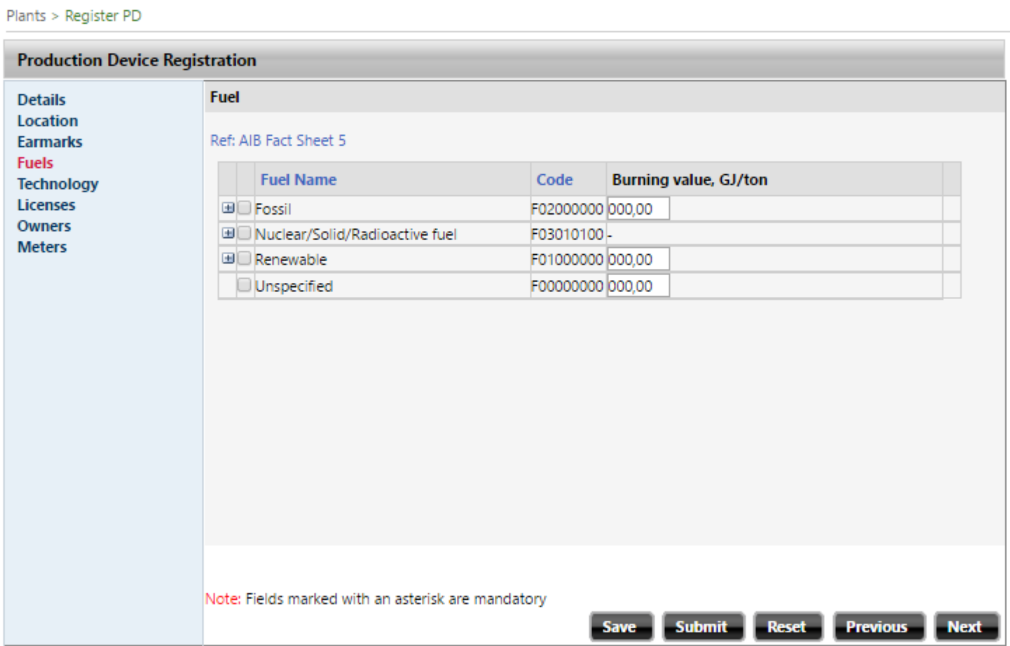


Figure 5.4 – Register PD: Fuels wizard

Table 5-4 – PD Fuels: Field Description

Name	Description
Fuel Name	Select Fuel(s) used by the Production Device. If more than one Fuel is selected, then this Production Device requires Declaration.
Code	The Fuel code as listed in EECS Fact Sheet 5.
Burning value	Enter the value in GJ/ton (This is required only for combusting devices).

5.2.5 Technology

The type of the Production Device has to be reported during the registration of a Production Device. The technology of the Production Device has to be chosen from a three-level hierarchy as laid out in EECS Fact Sheet 5. Please select the most accurate description. A Production Device can have only one technology code (Figure 5.5).

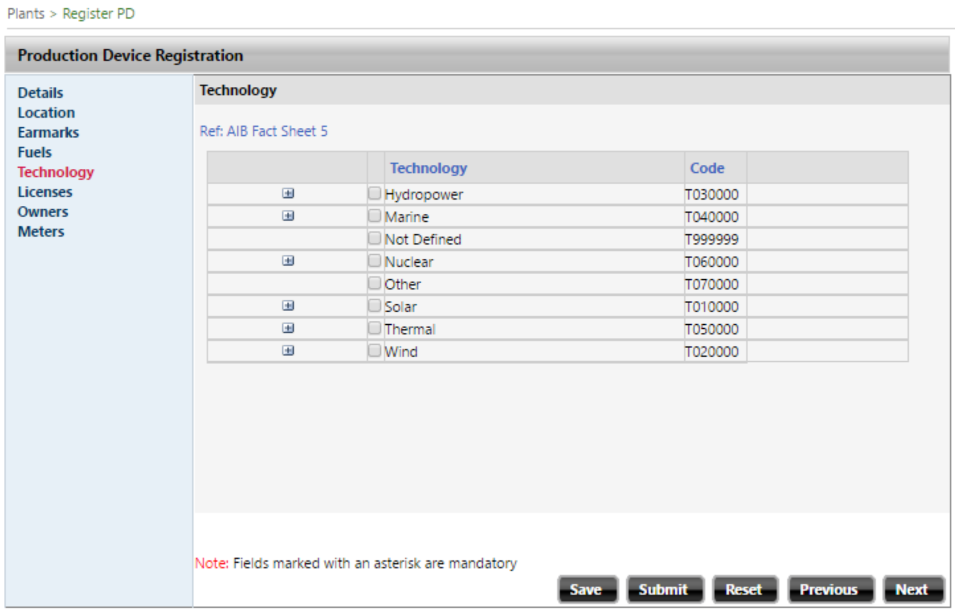


Figure 5.5 – Register PD: Technology wizard

5.2.6 Operator

Note: The operator tab is **domain specific**, i.e. it is shown if the domain has enabled. Please contact your Issuing Body to know more.

Navigate to **Plants>Register PD>Operator**.

This tab page captures the details of the operator of the Production Device (Figure 5.6). A Production Device can be operated by the Issuing Body or by any Account Holder. The Registrant is set as the operator by default.

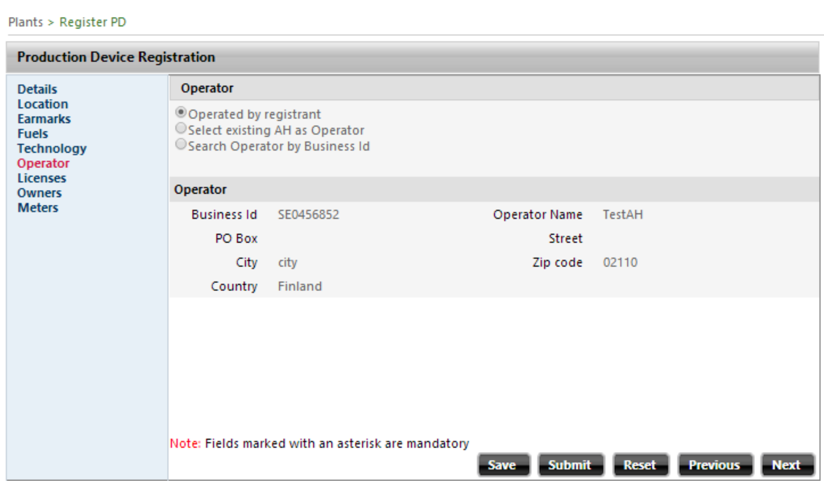


Figure 5.6 – Register PD: Operator wizard (option 1)

Select one of the following:

1. **Operated by Registrant**: The Registrant will be the one operating the device. The Registrant Address is displayed in the lower panel (Figure 5.6).
2. **Select any existing AH as operator**: You can select an appropriate Account Holder from the list (Figure 5.7).
3. **Search operator by Business Id**: You can set the operator based on a Business ID (Figure 5.8).
    - Enter the Business Id and click **Check.**
    - The operator details will be displayed in the lower panel.
    - If no AH with this business id exists in this Domain, a new contact will be created (Figure 5.9).

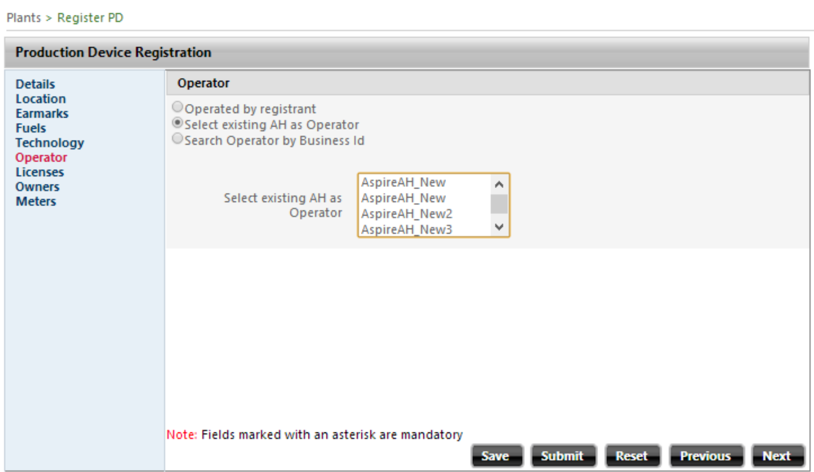


Figure 5.7 – Register PD: Operator wizard (option 2)

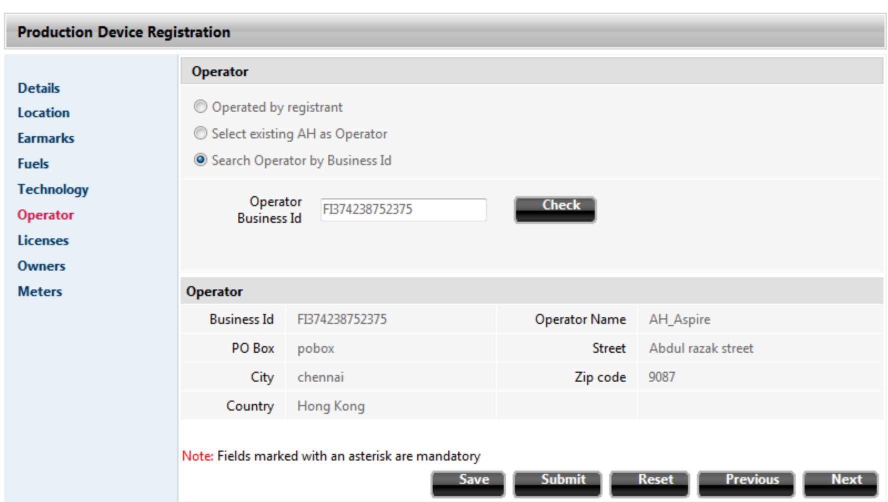


Figure 5.8 – Register PD: Operator wizard (option 3)

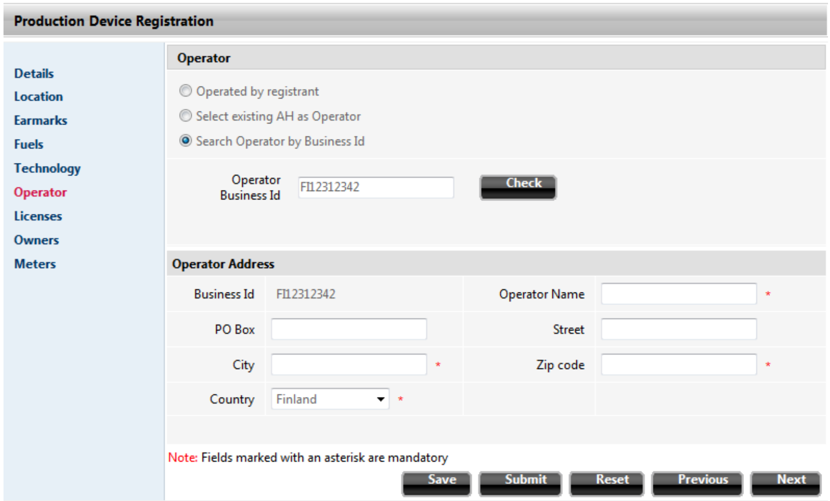


Figure 5.9 – Register PD: Adding an Account Holder with Business ID

5.2.7 Licenses

Navigate to **Plants>Register PD>Licenses**.

This tab enables you to select the Licenses for the Production Device (Figure 5.10). Both, the license's Purpose and the available Trading Schemes are mapped according to the ones available for the Issuing Body.

It is possible to set one or more Trading Schemes for each License and all created licenses will generate separate certificates bundles on Issuing based on the license's validity period and allocation factor.

For example, after selecting the license's purpose, Disclosure, the Trading Schemes field is populated with the available options for your domain. It is possible to create a license with trading scheme GO and ICS:RECS and to create a second license with only GO. Each of these licenses can have different allocation factors and start/end dates (Figure 5.11).

Notes: The sum of allocation factors of separate licenses should never be over 100% for a same period.

Depending on the Domain's configuration, License Expiration Date is a required field. Please contact your Issuing Body to know more

Moreover, if enabled in the domain, it is possible to set specific Installed Capacity and/or Commission Date for each separate license and with different values than the ones given in the Production Device's Details tab. This allows issuing of increased capacity of Production Device (PD) with different commissioning date and installed capacity compared to the information of the old capacity of the production device.

Note: If "Installed Capacity" or, "Commissioning Date" are left empty, the corresponding fields in the Details menu will be used.

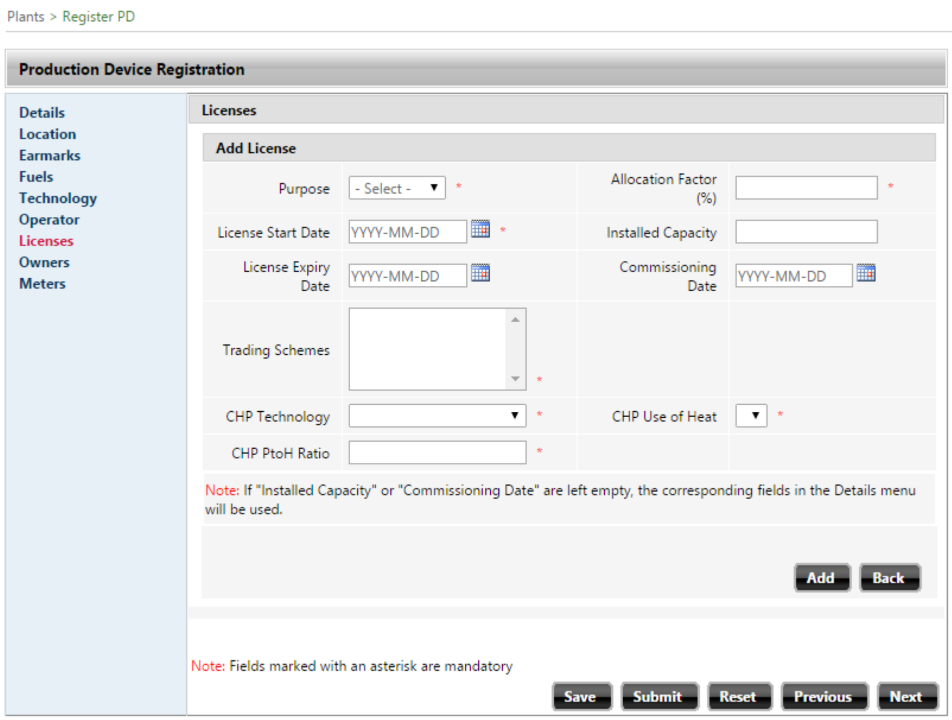


Figure 5.10 – Register PD: Licenses wizard

Table 5-5 – PD Licenses: Field Description

Name	Description
Purpose	Disclosure purpose is the only available in CMO.grexel
Allocation Factor (%)	Percentage that tells how much of the total number of certificates should be allocated for each license (default is 100%)
License Start Date	Start Date applicable for the License
License Expiry Date	The End Date of the License for the Production Device. Required field depending on the domain configurations.
Installed Capacity	Maximum capacity of the PD when the license is created (it may differ from the initial installed capacity)
Commissioning Date	Date of commissioning the PD when the license is created (it may differ from the initial date)
Trading Schemes	Select the trading schemes that are part of a license

CHP Information	To register the PD for the CHP-GO scheme (License), enter the CHP data. For information about the different options (CUOH1-3), visit the [AIB website]()
Action keys	
Add	Click add to save a created license
Back	Click back to return to the previous window

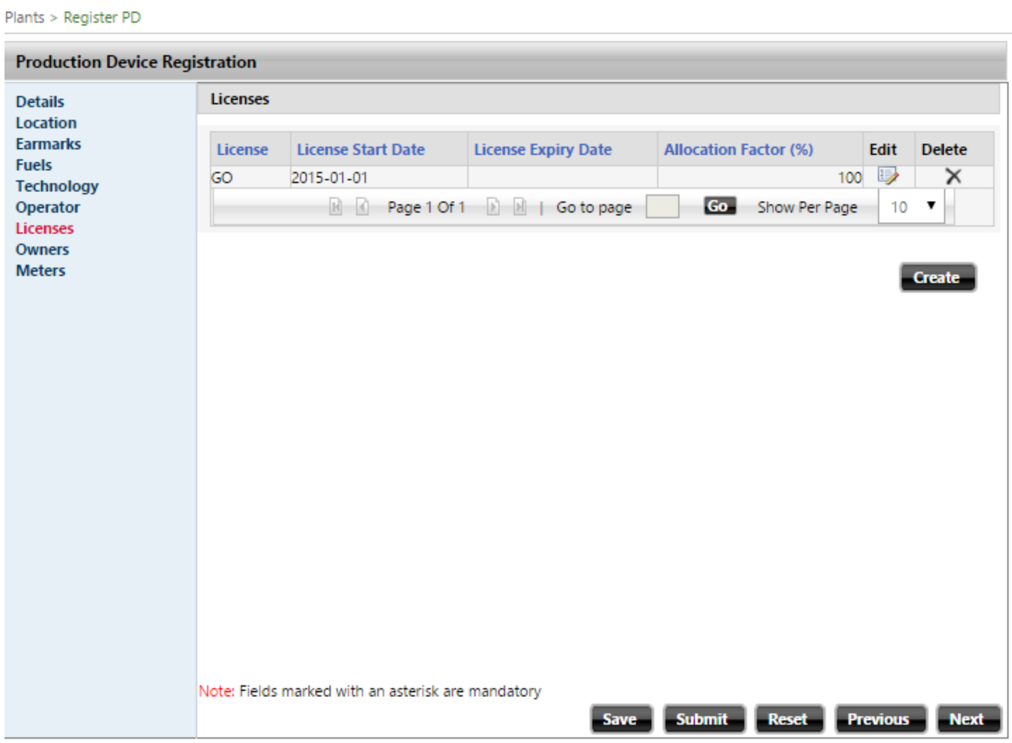


Figure 5.11 – Register PD: Licenses wizard – example

Table 5-6 – PD Licenses: Field Description

Name	Description
License	The name of the License
License Start Date	Start Date applicable for the License
License End Date	The End Date of the License for the Production Device
Allocation Factor (%)	Percentage that tells how much of the total energy generated should be allocated for each license (e.g. 100%).
Action keys	
Edit	Click to edit the Start Date, End Date, and the CHP information

Name	Description
Delete	Click to delete the License
Create	Click to add new License for the device

5.2.8 Owners

Navigate to **Plants>Register PD>Owners**.

The Production Device can have several owners. By default, the Registrant owns 100% of the device in which case the user interface is as shown in Figure 5.12. Field description is presented in Table 5-7.

1. To add new owners, *unselect* the checkbox "**Registrant owns 100%"** and follow the instructions given below. Any existing AH can be assigned as the owner of the Production Device (Figure 5.14).
2. Click **Add Owner** to add a new owner for this device
3. The system offers two options to select the owner AH. You can either select the owner AH from the list of existing AHs (Figure 5.14) or give a Business ID to select an Account Holder (Figure 5.15).
   - If you select existing account holder as owner, enter the ownership percentage of the device for the owner. If you wish to aggregate the certificates to an existing Account Holder, contact the Issuing Body. Click **Add.** To include more owners, repeat the process.
   - To locate and assign an Account Holder as the owner using the Business Id, use the second option (Figure 5.15). Enter the Business Id in the text box (including the country code) in the text box, give the ownership percentage and click **Check**.
     - If an Account Holder with this Business Id exists, the new ownership details are added to the existing list of owners.
     - If such an owner does not exist, the system allows you to add details to the owner of the given Business Id (Figure 5.16). Only Business IDs starting with existing country codes (large case) can be added.

     These owners do not have an Account specified to them and such owners cannot receive any certificates. If the respective share of such owner is not aggregated to an existing Account Holder, this share of the production of that PD will not be issued.

5.2.8.1 Changing the owner(s):

The default procedure for changing the ownership shares in CMO.grexel is as follows:

1. The Registrant (AH) edits the owner details so that ownership percentages are correct. First, decrease the ownership shares of existing owner(s) to reflect the current/upcoming situation,

and add other owners (follow the instructions above). Previous owners can be deleted by clicking the **Delete** button. Finally, submit and confirm the PD.

2. The Issuing Body approves the PD. When approving the PD, the IB chooses to create a new version and sets the changes effective date as agreed between the owners. The effective date is the day beginning of which the production is shared according to the new ownership share. This means that also the meter reading break should be exactly at the same time as the change of ownership. Normally this can be achieved by setting the effective date at the same time as the normal break in the meter values. For daily meter values this is 00 during wintertime and 23 during summertime.
3. The Issuing Body activates the PD. Before activation, the Issuing Body may ask the Account Holder to provide evidence on ownership shares e.g. by having the AH to sign the registration form again.

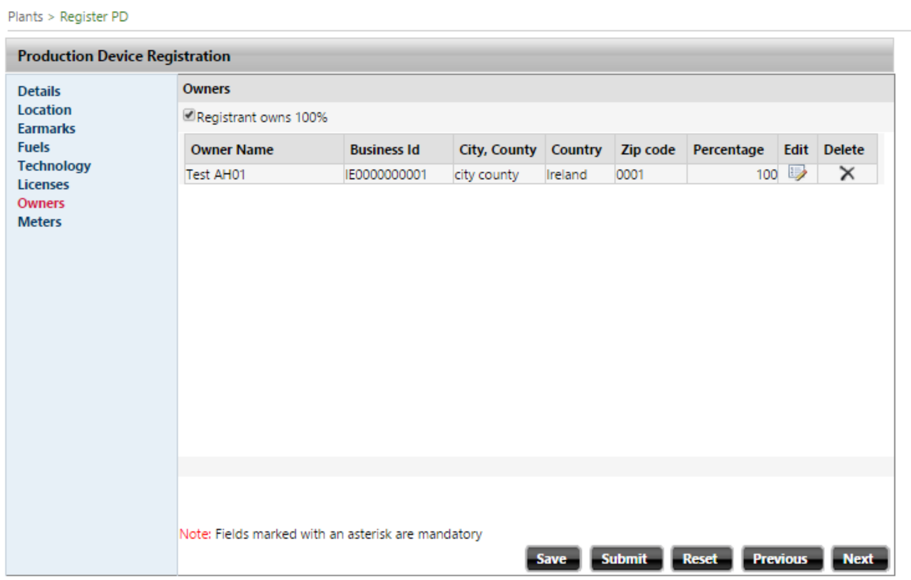


__Figure 5.12 – Register PD: Owners wizard__

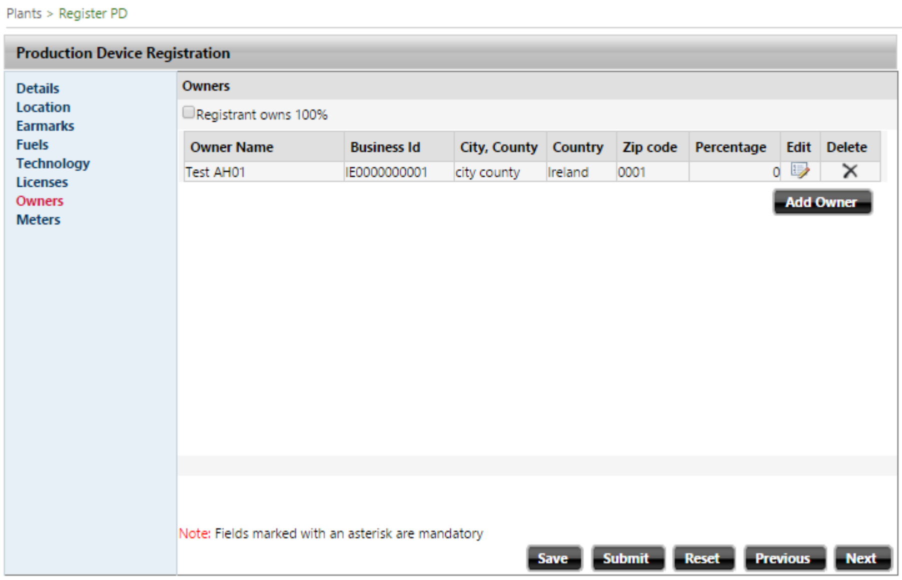


Figure 5.13 – Register PD: Owners wizard –Add owner

Table 5-7 – PD Owners: Field Description

Name	Description
Owner Name	Name of the Owner as entered while creating the Account Holder
Business Id	Business Id assigned while creating the Organization
City, County	City or county in which the owner is located
Country	Country in which the owner is located
Zip Code	Zip-code of the owner’s location
Percentage	Share of PD owned by this owner
Action keys	
Edit	Click to edit the owner percentage.
Delete	Click to delete the owner.
Add	Click to create a new owner when the Production Device is not 100% owned by the Registrant.

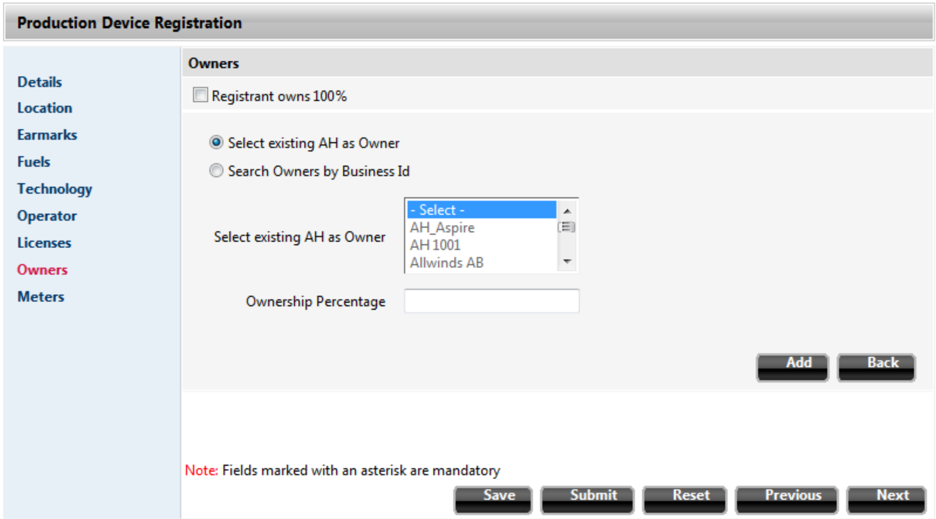


Figure 5.14 – Register PD: Owners wizard (option 1)

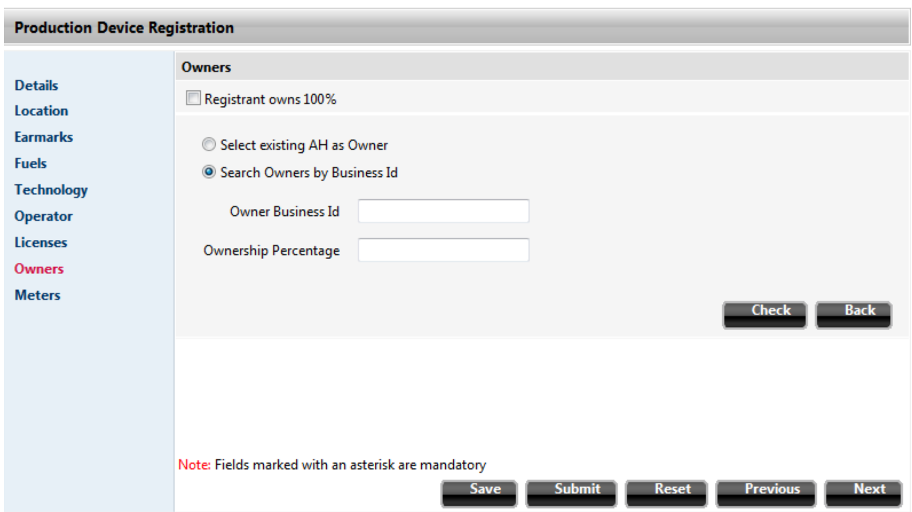


Figure 5.15 – Register PD: Owners wizard (option 2)

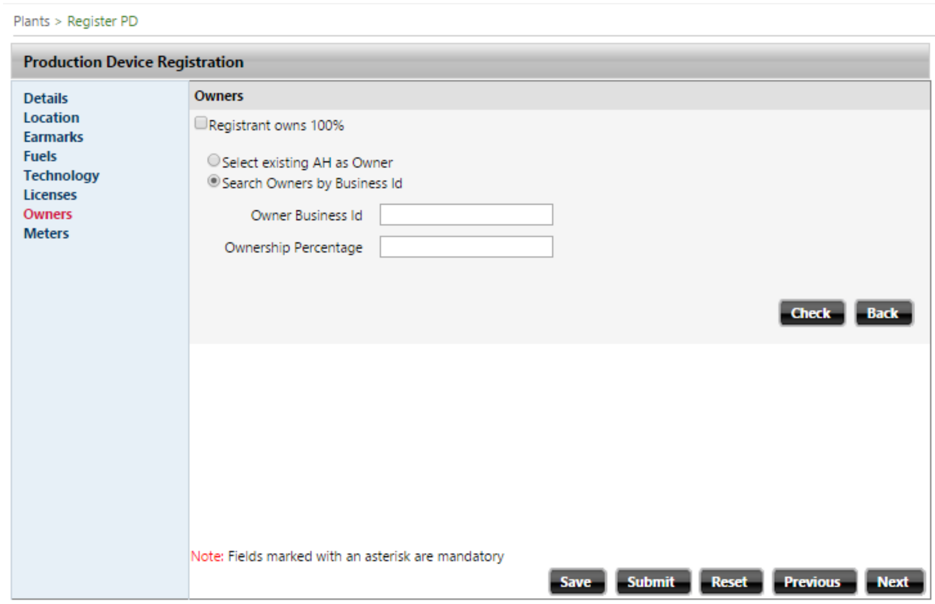


Figure 5.16 – Register PD: Owners wizard (option 3)

5.2.9 Meters

Navigate to **Plants>Register PD>Meters**.

Each Production Device can be associated with one or more meters. This tab page captures information on these meters. Add a meter by defining the values given in Table 5-8. The total production of PD is calculated by adding together meter readings from all the meters associated with the PD and subtracting the Plant's own consumption. This is done by defining the **Meter Calculation Formula** using the Meter Codes and '+' and '–' signs.

By using gross measurement, the system allows to set Net/Gross Declarations for all the meter readings for this Production Device at one go.

To do so,

1. Select the Gross Measurement check box (Figure 5.17).
2. On selecting this, two options are made available (Figure 5.18):
   - **Estimated**—Selected by default. Enter the Declaration percentage applicable for all meter readings of this PD in Net production percentage.
   - **Declared**—Click to select this option if you wish to set Net/Gross Declaration individually for every meter reading.

Note: Mandatory fields are marked with an asterisk (*). If these fields are left empty, the system displays an error message

Table 5-8 – PD Meters: Field Description

Name	Description
Meter Code	Meter name / identification
Grid Reference	Name of the grid to which this device is attached. This should be unique amongst the meters of all Production Devices in the Domain.
MWh Coefficient	The multiplying factor to be used to report the volume of electricity calculated from the meter readings in terms of MWh. The coefficient is set as 1 by default.
Manual	This field should be selected if the readings have to be entered manually.
Description	Description of the meter.
Incremental	If this field is selected, the system assumes that the input given is the electricity produced during the time period.
Initial Reading	If the meter is set as non-incremental, the initial reading of the meter has to be entered to enable the calculation of subsequent periods.
Meter Calculation Formula	The meter calculation logic that needs to be defined if more than one meter is added. Enter Meter Code ‘+’or ’–‘ Meter Code without spaces
Gross Measurement	Select this check box to include Net/Gross Declarations for all the meter readings of this Production Device (details given below).
Estimated	Net/Gross Declarations applicable for all meter readings of this PD.
Declared	Net/Gross Declarations for individual meters.
Description	Add a description if necessary
Action keys	
Create	Click to create new meter details.
Back	Click to cancel the data entered.

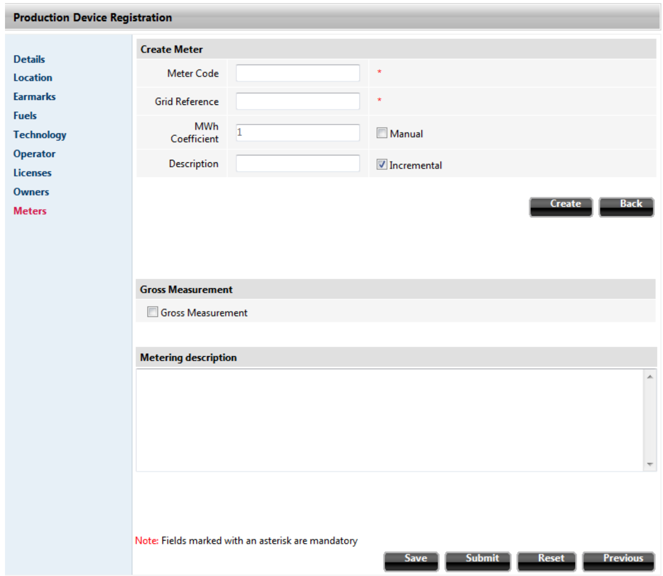


Figure 5.17 – Register PD: Meters wizard

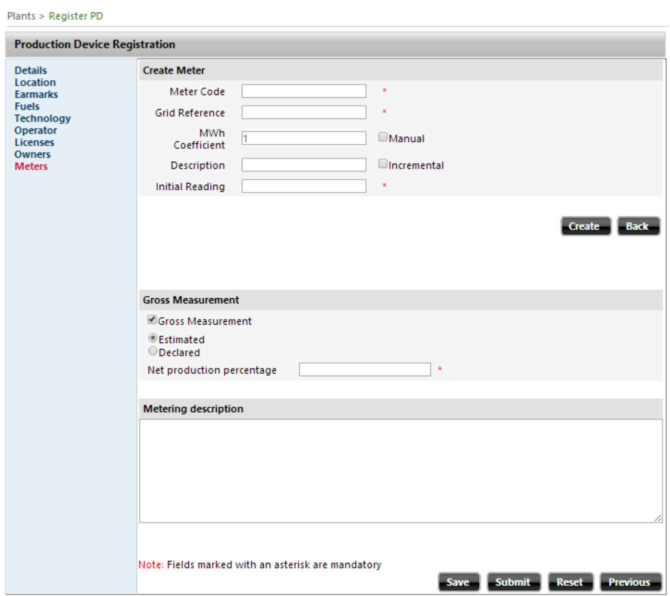


Figure 5.18 – Meters Gross Measurement settings

5.3 Manage Production Devices

When you navigate to the **Plants** module, the search criteria band expands and existing Production Devices of the Account Holder can be listed according to search criteria (Figure 5.19 and Table 5-9).

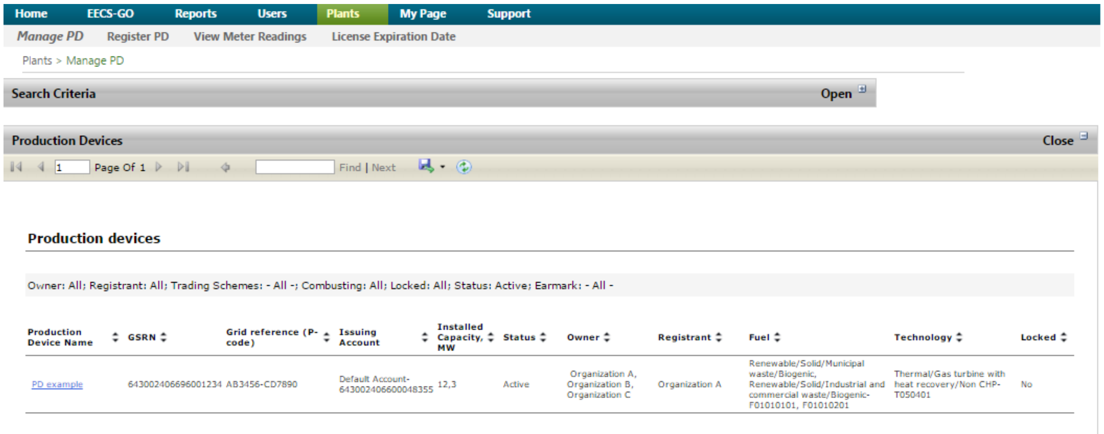


Figure 5.19 – Manage PD: Production Devices list

Table 5-9 – Production Devices: Field Description

Name	Description
Production Device Name	Production Device name. Click the link to see the details of the PD.
GSRN	GSRN assigned to this device
Grid Reference (P-code)	Reference of the PD in the grid
Issuing Account	The Account where Certificates will be issued.
Installed Capacity (MW)	Maximum capacity of the PD
Status	Indicates the status of the Production Device (e.g. Active or Approved).
Owner	Owner of the PD
Registrant	The organization that registered the PD
Fuel	Specifies the Fuel(s) used by the PD.
Technology	Specifies the Technology of the PD
Locked	Indicates whether or not the PD is locked (yes/no).

5.3.1 Search for a Production Device

Navigate to **Plants>Manage PD**.

Expand the Search criteria band and fill the required criteria (Figure 5.20). Table 5-10 gives the search criteria descriptions in detail.

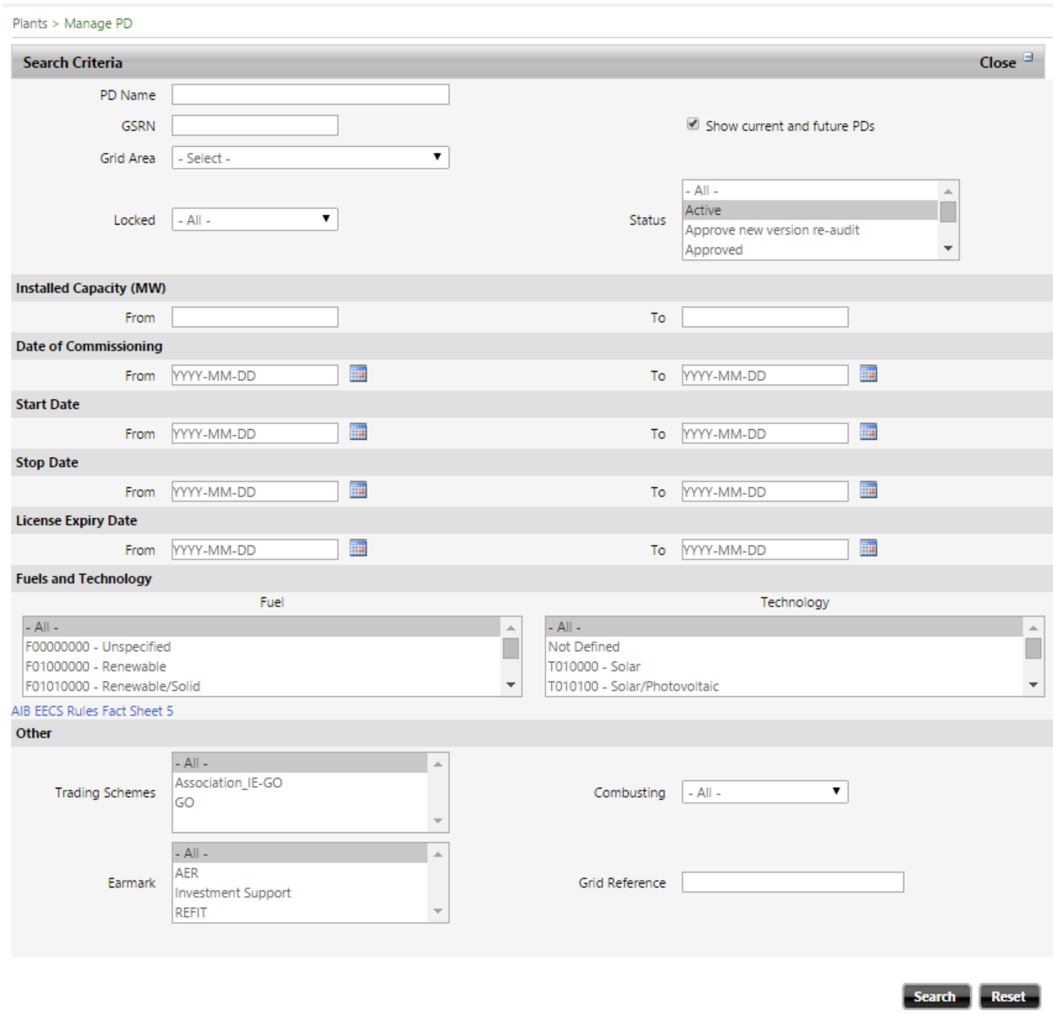


Figure 5.20 – PD Search Criteria

Table 5-10 – PD Search Criteria: Field Description

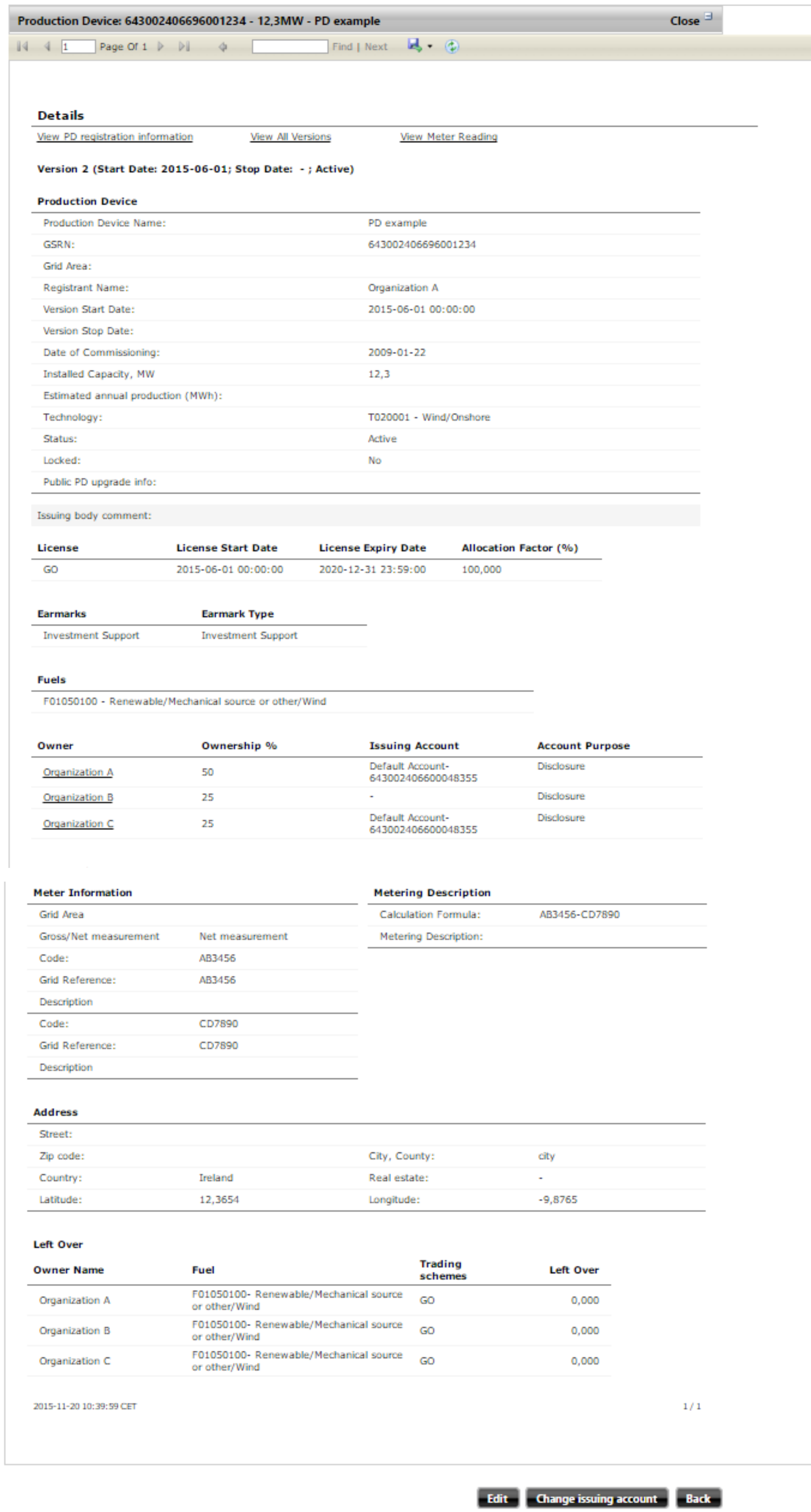
Name	Description
PD Name	Enter the PD name.
GSRN	Enter GSRN to list the PD with the GSRN no.
Grid Area	Select a Grid Area to list PDs in this Area.
Locked	Select All from the dropdown list to list the PDs irrespective of the Lock status. Select Locked/Unlocked to view the PDs with the specific status.
Show current and future PDs	When checked, the report will show only PDs where version stop date is not in past

Status	Select the Status from the list box to list the PDs with the specified status. Active is selected by default
Installed Capacity (MW)	Enter the range of installed capacity using From and To fields to list PDs with this range of capacity.
Date Of Commissioning	Enter the range of dates using From and To fields to list the PDs which were commissioned during this period.
Start Date	Enter the range of dates using From and To fields to list the PDs with a Start Date during this period.
Stop Date	Enter the range of dates using From and To fields to list the PDs with a Stop Date during this period.
License Expiry Date	Enter the range of dates of licenses of the PD
Fuel and Technology	Select the Fuel(s) and Technology from the list box to list the PDs that use the specified source(s) of energy
Trading Schemes	Select Trading Schemes from the list box to list the PDs
Combusting	Select Yes or No from the list to list combusting or non-combusting PDs.
Earmark	Select Earmark(s) from the list box to list the PDs which have been associated with the Earmark(s).
Grid Reference	Search by Grid Reference.
Action links	
Search	Click this to invoke the search and display the filtered device list.
Reset	Click this to reset the screen to enter new search conditions.

5.3.2 View Production Device Details

Navigate to **Plants>Manage PD**.

1. To view the details of a Production Device (PD), click the PD Name link on the PD list (Figure 5.19). The details of the current version of the PD are shown (Figure 5.21).
2. If the Production Device has several versions, the links to previous versions are shown on the top of the details view. Table 5-11 explains the hyperlinks and the action keys available in this view.
3. Click **Edit** to make changes in Production Device. Refer to Registering a Production Device for details.


Production Device: 643002406696001234 - 12,3MW - PD example Close

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Details

View PD registration information View All Versions View Meter Reading

Version 2 (Start Date: 2015-06-01; Stop Date: - ; Active)

Production Device

Production Device Name:	PD example
GSRN:	643002406696001234
Grid Area:	
Registrant Name:	Organization A
Version Start Date:	2015-06-01 00:00:00
Version Stop Date:	
Date of Commissioning:	2009-01-22
Installed Capacity, MW	12,3
Estimated annual production (MWh):	
Technology:	T020001 - Wind/Onshore
Status:	Active
Locked:	No
Public PD upgrade info:	

Issuing body comment:

License	License Start Date	License Expiry Date	Allocation Factor (%)
GO	2015-06-01 00:00:00	2020-12-31 23:59:00	100,000

Earmarks	Earmark Type
Investment Support	Investment Support

Fuels
F01050100 - Renewable/Mechanical source or other/Wind

Owner	Ownership %	Issuing Account	Account Purpose
Organization A	50	Default Account-643002406600048355	Disclosure
Organization B	25	-	Disclosure
Organization C	25	Default Account-643002406600048355	Disclosure

Meter Information

Grid Area	
Gross/Net measurement	Net measurement
Code:	AB3456
Grid Reference:	AB3456
Description	
Code:	CD7890
Grid Reference:	CD7890
Description	

Metering Description

Calculation Formula:	AB3456-CD7890
Metering Description:	

Address

Street:			
Zip code:		City, County:	city
Country:	Ireland	Real estate:	-
Latitude:	12,3654	Longitude:	-9,8765

Left Over

Owner Name	Fuel	Trading schemes	Left Over
Organization A	F01050100- Renewable/Mechanical source or other/Wind	GO	0,000
Organization B	F01050100- Renewable/Mechanical source or other/Wind	GO	0,000
Organization C	F01050100- Renewable/Mechanical source or other/Wind	GO	0,000

2015-11-20 10:39:59 CET 1 / 1

Edit Change issuing account Back

Figure 5.21 – Production Device Details

Table 5-11 – Production Device Details Hyperlinks

Name	Description
View PD registration Information	This is a domain specific form and might not be available in all domains. Click to see the PD Registration form of the PD. It contains complete details of the PD.
View all Versions	Click to view information on the previous versions of the same PD (different versions have different production times)
View Meter Readings	Click to see the Meter readings periods recorded in the system for that Production Device. Refer to Chapter 5.5 for details on managing and viewing meter readings.
Version	Click to view information on the previous versions of the same PD (all versions have different production times).
Owner Name	Click to view the details of the owner Organization(s).
Action Keys	
Edit	Click to make changes in the PD details. Chapter 5.3.2.2.
Change issuing account	Click to change Issuing account. See Chapter 5.3.4
Confirm	This is shown if the PD has been edited by AH user, who does not have permission to send the device to the Issuing Body for approval.
Back	Click Back to cancel and return to the previous data

5.3.2.1 PD Registration Form Link

Navigate to **Plants>Manage PD>Click PD name>View PD registration Information**.

The PD Registration Form can be seen by selecting the link **View PD registration Information** on the Production Device details. The PD Registration form contains all the details of the PD. It can be printed, signed and sent to the Issuing Body for the approval of the device. The form is multi-paged and the first page is shown in Figure 5.22.

In case the device is multi-owned or the owner of the device is not the Registrant of the device, the **Power of Attorney** link is shown. This enables Registrant to receive certificates on behalf of Production Device owner.

Production Devices Open

Production Device: 643002406696001234 - 12,3MW - PD example Close

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grexel

AIB association of issuing bodies

Production Device Registration form

Declaration of change: Yes

Owner of the Production Device

Name:	Organization A	Ownership share:	50
Contact Person:	john mclane		
Street:	street	Mobile Phone:	00001
Postal Code:		Fax:	
City, County:	city	Email:	j.mclane@grexel.com
Country:	Ireland		

Owner of the Production Device

Name:	Organization B	Ownership share:	25
Contact Person:	test test		
Street:	abc street	Mobile Phone:	00002
Postal Code:		Fax:	
City, County:	city	Email:	test@grexel.com
Country:	Ireland		

Owner of the Production Device Power of attorney form (required only if ownership share is aggregated)

Name:	Organization C	Ownership share:	25
Contact Person:	test test		
Street:	abc street	Mobile Phone:	00003
Postal Code:		Fax:	
City, County:	city	Email:	test. orgC@grexel.com
Country:	Ireland		

Operator of Production Device

Name:	Organization A	Contact Person:	john mclane
Street:	street	Mobile Phone:	00001
Postal Code:		Fax:	
City, County:	city	Email:	j.mclane@grexel.com
Country:	Ireland		

Registrar of the Production Device

Name:		Contact Person:	
Street:		Mobile Phone:	
Postal Code:		Fax:	
City, County:		Email :	
Country:			

1 / 3

Figure 5.22 – PD Registration Form

5.3.2.2 View PD Meter Readings Link

You may view the meter readings of your active PD in the PD details – View meter readings link.

1. Navigate to **Plants>Manage PD>Click PD name>View Meter Readings Link**
2. The meter reading search criteria will appear. By default the search criteria is filled with the last month period. If needed, change the period of meter reading you are interested to view and click **Search.**
3. The Meter readings values that correspond to the period of interest will be shown

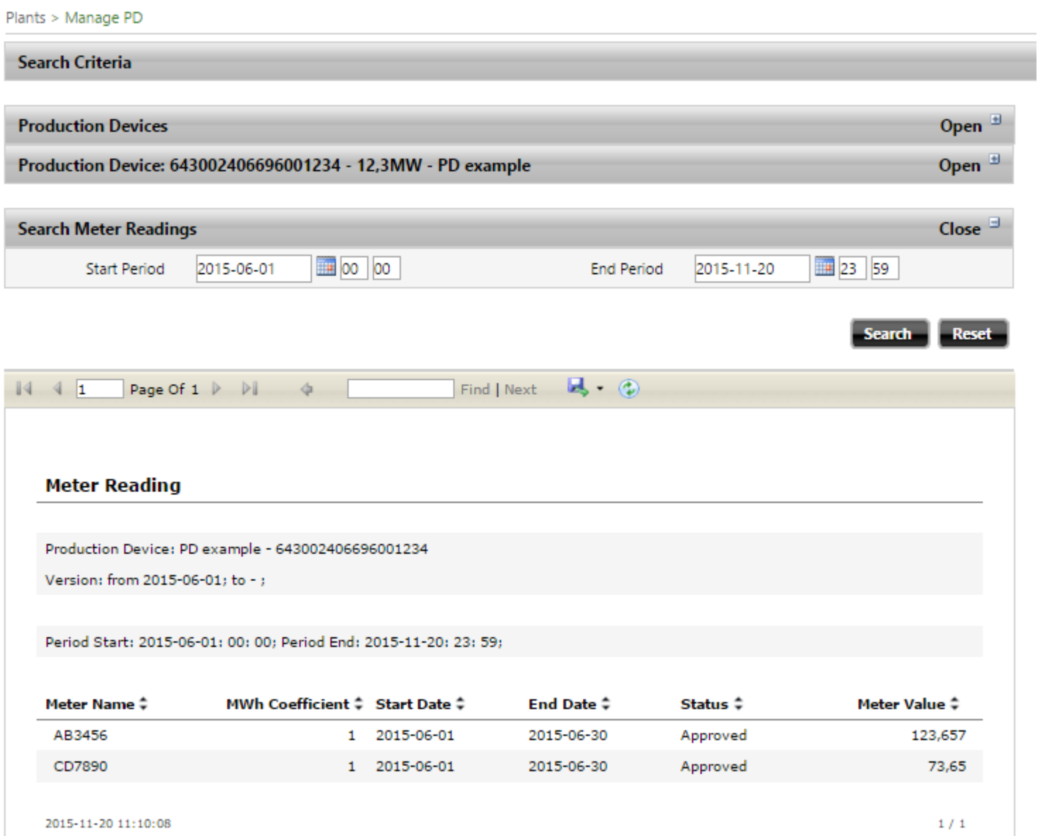


Figure 5.23 – View PD's Meter Readings Link

Alternatively, you can search for all the meter readings of *all* Production Devices owned by your Organization. See Chapter 5.5.1

5.3.3 Editing a Production Device

Note: Users with the role AH PD Editor can edit Production Devices. However, they are not authorized to confirm the editing. Only AH Root and AH PD Administrator users can **confirm** the changes. Only the Account Holder registered as the Registrant can edit the Production Device, not the Operator nor the Owners. The Registrant can of course also be the Operator and/or an Owner.

Changes in PD's ownership, licenses and meters may require that a new version is created for the PD. The Issuing Body will decide whether a new version needs to be created. New version have same GSRN number but different validity period. Each version has a unique production period. Hence, certificates inherit the data and refer to the Production Device's version that was active at the time of production of the certificate.

Navigate to **Plants>Manage PD>Click PD name>Edit**.

1. After completing the changes, click Submit to submit the task to the Issuing Body for approval.
2. If you do not have rights to confirm the edit, then an AH Root or PD administrator user is required for confirmation.
3. The task to confirm or approve the changes will be shown on the start page of the application (Figure 2.2).
4. See Chapter 5.1 for the workflow of Production Device registration.

5.3.4 Change the issuing Account

Navigate to **Plants>Manage PD>Click PD name>Change issuing Account**.

1. To change the issuing Account for a specific Production Device, click the **Change issuing Account** button on the PD Details page.
2. Choose the issuing Account from the dropdown list. The current issuing Account is selected by default.
3. Click **Save** to confirm the change or click **Back** to go back to the PD Details page without effecting any changes.

Note: Changing the issuing Account depends on the Account Holder's relation to the Production Device. If your ownership share is aggregated to another Account Holder, you cannot change the issuing Account. If you are an Owner of a multi-owned Production Device but have not aggregated your ownership share, the issuing Account can be changed: however, the change only applies to the certificates determined by your ownership share. The change can be seen in the Production Devices list under 'Issuing Account'. In the case of aggregation, the field shows the text "Aggregated to [Account Holder the share is aggregated to]".

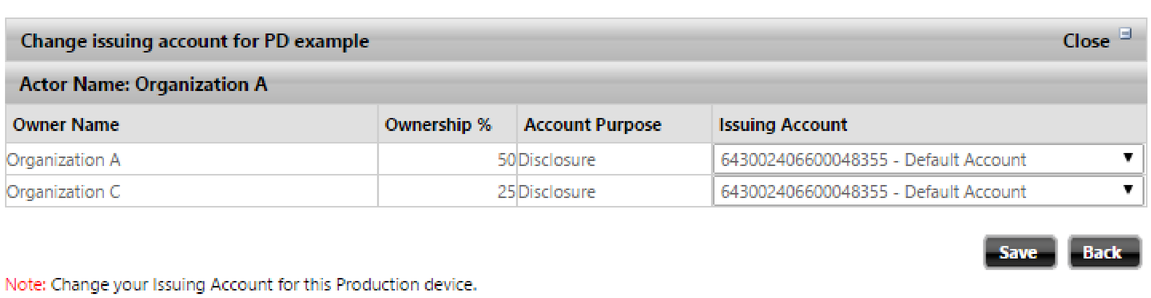


Figure 5.24 – Change the issuing account

5.3.5 Re-audit of a Production Device

All Production Devices are to be re-audited at the end of a specified period. This date is set by the IB during the process of PD Approval and is seen on the Production Device details tab. In addition, the IB may require re-audit when the details of the PD are changed. If re-audit is required, then the steps followed for the initial registration are repeated. See Chapter 5.1 for the workflow of PD editing.

The AH can see the information on expiring licenses under License Expiration Date submenu

5.3.6 PD Deregistration

In order to deregister a PD, contact the Issuing Body. A deregistered PD no longer can receive meter readings.

5.4 License Expiration Date

The License Expiration Date report lists all Production Devices with expiring licenses. License expiration date might not be used in all domains in which case the license expiration date report search won't return any results.

1. Navigate to **Plants>License Expiration Date**
2. Fill the search criteria and select **Search**

Note: By default the search criteria shows license expiration dates 3 months from now. Change the dates if you need a longer period.

3. The expiring licenses are listed, and the re-audit date is that of the license expiring the soonest.

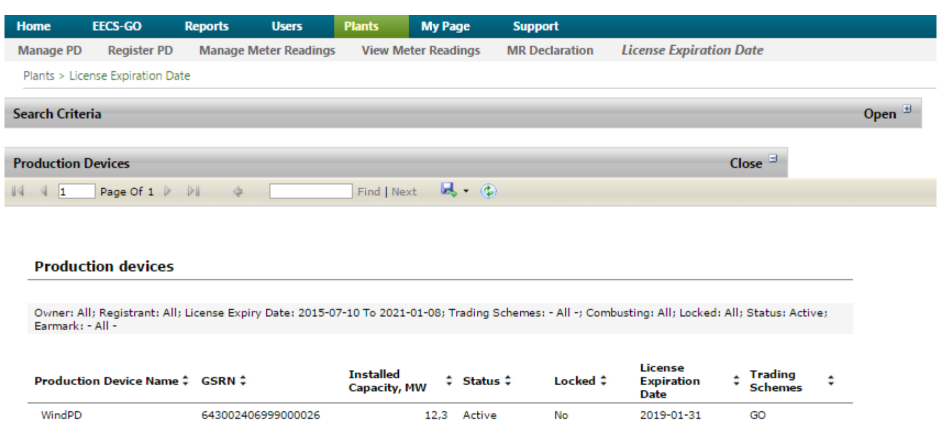


Figure 5.25 – License Expiration Date

5.5 Meter Readings

This chapter describes two functionalities available under Plants module: **Manage Meter Readings** and **View meter Readings**.

5.5.1 View Meter Readings

Under **Plants>View Meter Readings**, AH user with sufficient rights may view the Meter Readings of their Production Devices. Differently than the View Meter Reading link available in PD details where you see Meter Readings of one specific PD (see Chapter 5.3.2.1), this functionality allows the users to also see *all* the Meter Readings of *all* PDs owned by the Organization.

1. Navigate to **Plants>View Meter Readings** (Figure 5.26)
2. Fill the Search Criteria specifying the Meter Reading period you are interested in searching. By default the systems selects a periods starting from the beginning of the previous month. You may also narrow down your search by inserting a PD Name, GSRN, Installed Capacity, Date of Commissioning, etc. if you are interested in certain PDs' Meter Readings.
3. Click **Search**
4. A list of Meter Readings that belong to the PDs specified in your search criteria will appear (Figure 5.27)
5. You can Export the details to an Excel sheet or a PDF file by clicking the **Export** button and choosing the suitable option.

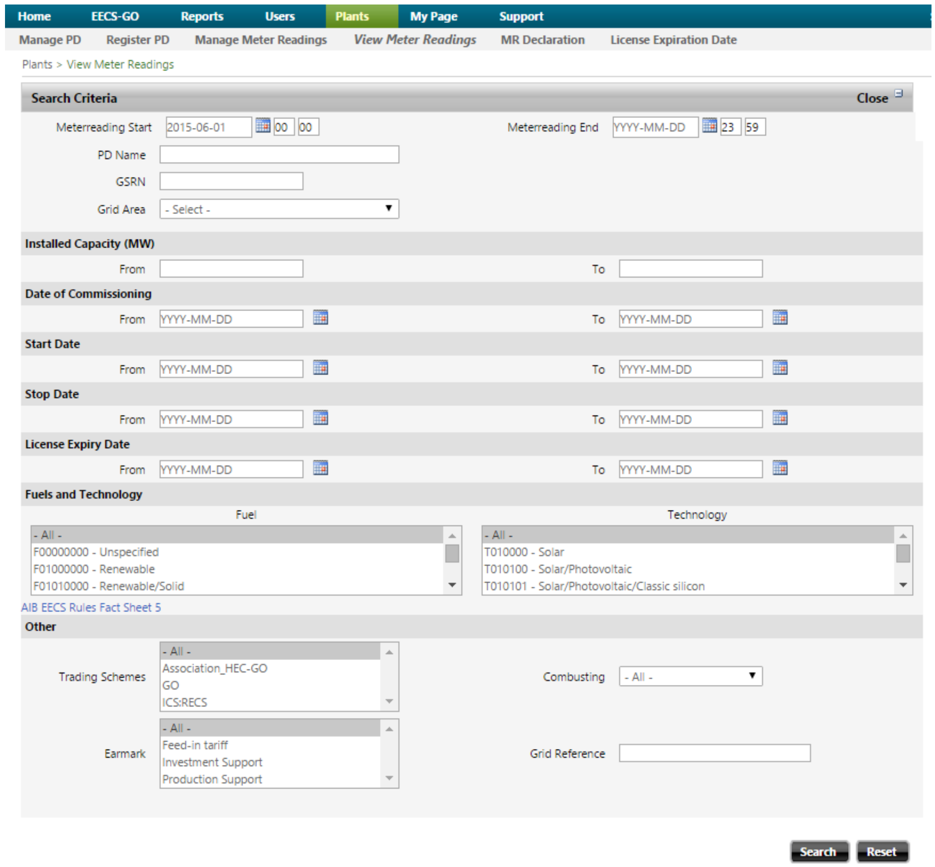


Figure 5.26 – View Meter Readings: Search Criteria

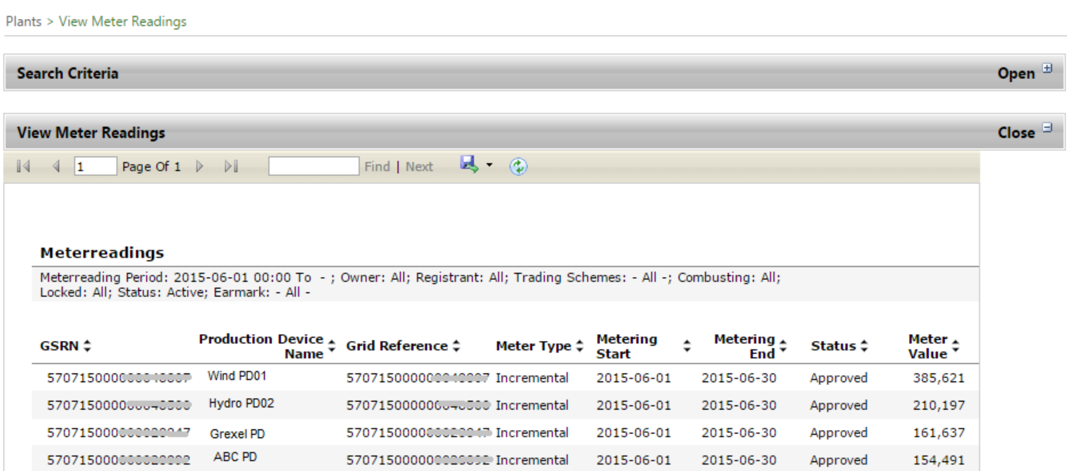


Figure 5.27 – View Meter Readings: Results

5.5.2 Manage Meter Readings

5.5.2.1 Adding Meter Readings

Note: Manage Meter Readings is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.

If enabled in the Domain, only AH PD Administrator or AH Root can insert Meter Readings

An Account Holder can set Meter Readings for the device through the system, if the Domain allows to. **Plants>Manage Meter Readings** submenu enables AH PD Administrator or AH root to view their added and missing PD's meter readings (MR) and also add new MR.

1. Navigate to **Plants>Manage Meter Readings**,
2. Fill the search criteria accordingly and click **Search** to View and Add Meter readings.
3. A list of PDs is shown (Figure 5.28).

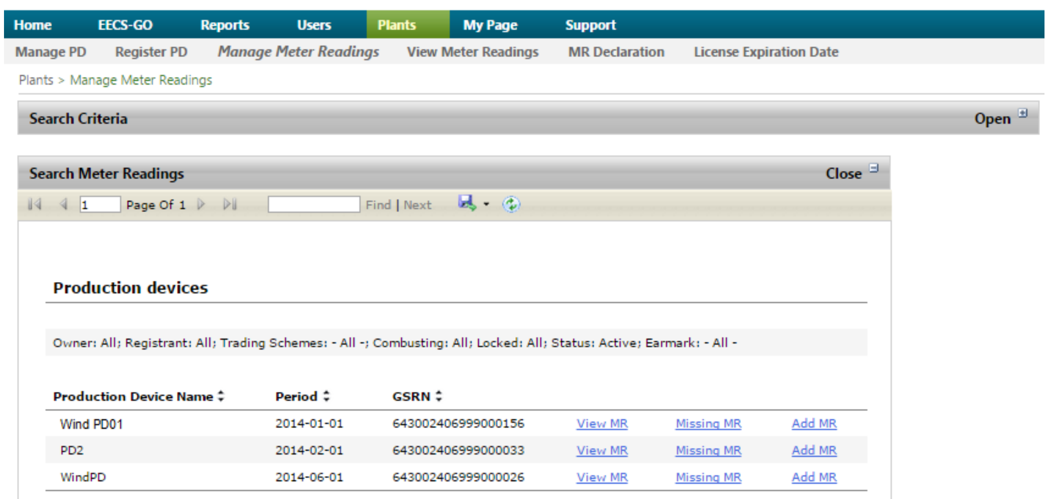


Figure 5.28 – Manage Meter Readings functionality

4. To add meter readings click on **Add MR** link for the PD that you want to add MR to. Screen as Figure 5.29 will appear.
   a. Insert the period that the meter readings entry refers to and click **Get Meters**.
   b. The screen will refresh and the available meter for the selected period will appear on Meter field.
   c. Select the appropriate **meter** and enter the **meter value**. Click **Create**.

Notes: The metering periods are based on agreed domain-specific rules and thus may vary. They can be daily, weekly, or monthly. Discuss with your Issuing Body what period is correct.

The produced energy volume cannot be more than 130% of (Installed Capacity x time in hours).

d. Review the data and if all is correct select confirm.

e. After the confirmation the new meter reading can be seen under View MR link (Figure 5.28)

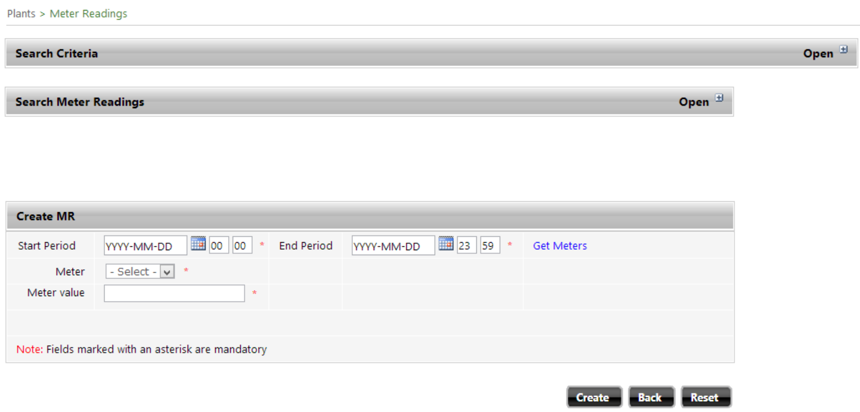


Figure 5.29 – Adding Meter Readings

5.6 MR Declaration*

Note: *Meter Readings Declaration is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.

If enabled in the Domain, only AH PD Administrator or AH Root can insert MR Declarations

In case the PD has multiple Fuels, a Declaration is required before the issue of certificates to determine the share of each Fuel.

1. Navigate to **Plants>MR Declarations**
2. Fill the search criteria accordingly and click **Search**
3. A list of PDs that require declarations is shown. See Figure 5.30.
4. Select **View Declarations** to view already added declarations or **Add Declarations** to insert new ones.

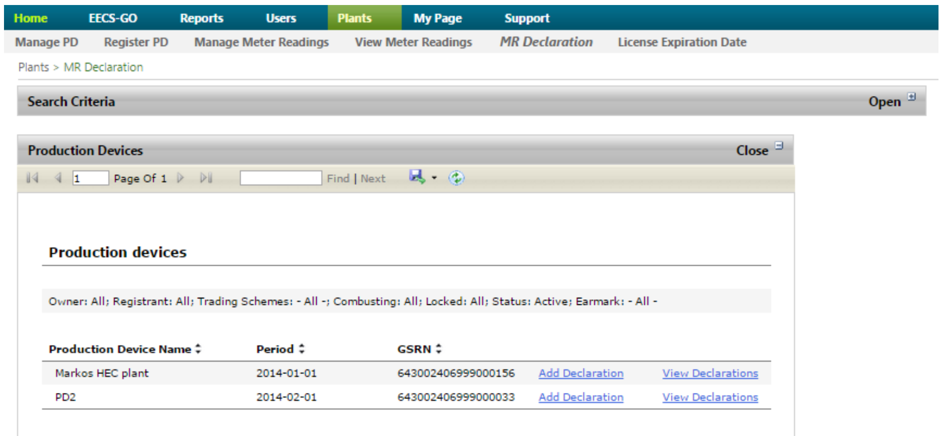


Figure 5.30 – Search MR Declarations

5.6.1 Adding MR Declaration

To add a new fuel declaration for a PD click on Add Declarations link for the respective PD.

1. Select the declaration Type – Fuel Declaration
2. Wait that the page is refreshed and select the Metering Periods
3. Add the declaration percentage (the Total must equal to 100%) and the description
4. Click **Create**

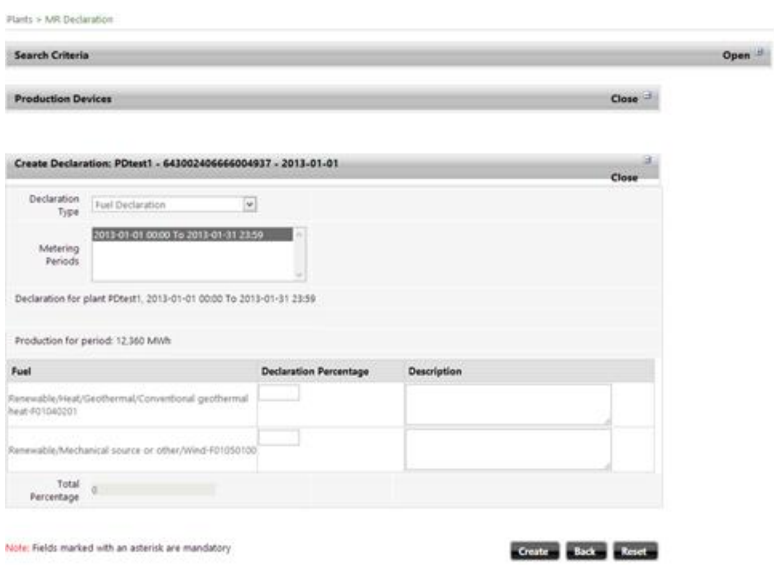


Figure 5.31 – Adding MR Declarations

5.7 Issuing Request*

Note: Issuing Request is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.

If this functionality is enabled in your domain, only **AH Root** users can request issuing. See Figure 3.1 for user roles and permissions

Under **Plants>Issuing Request** you can see your Production Devices' meter readings that are available for issuing. This functionality allows you to request that a certain amount from the total available energy is issued.

Note: Issuing request can be done no more than 6 months after the production end period

1. Navigate to **Plants>Issuing Request**
2. Select the search date (YYYY-MM). The date refers to the meter reading period to which you want to do an issuing request (Figure 5.32). Click **Search**.
3. The Production Devices (PDs) and their Metering reading periods will be displayed (Figure 5.33). See Table 5-12 for the description of the fields.
4. Select **Issue All** check box if you would like to issue the total volume shown in Available for Issuing or input in the volume you would like to request issuing for in the **Requested Amount** column.
5. Click **Save**.
6. The Issuing Body will be notified about your Issuing Request and certificates will be issued in due date
7. Issued certificates will be credited to your account under EECS-GO menu according to the Issuing Account of the Production Device. To change a PD's Issuing Account see Chapter 5.3.4.

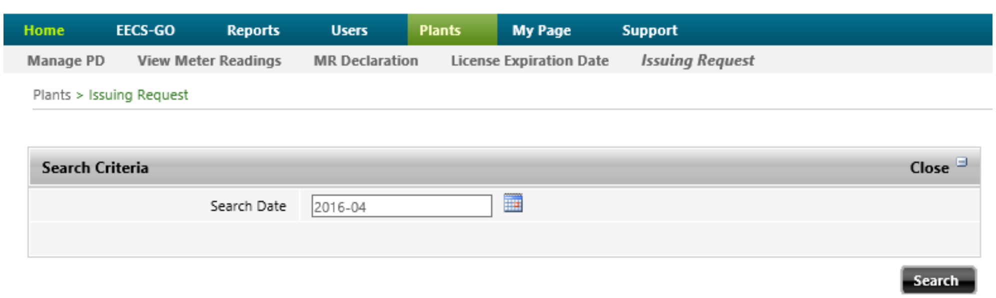
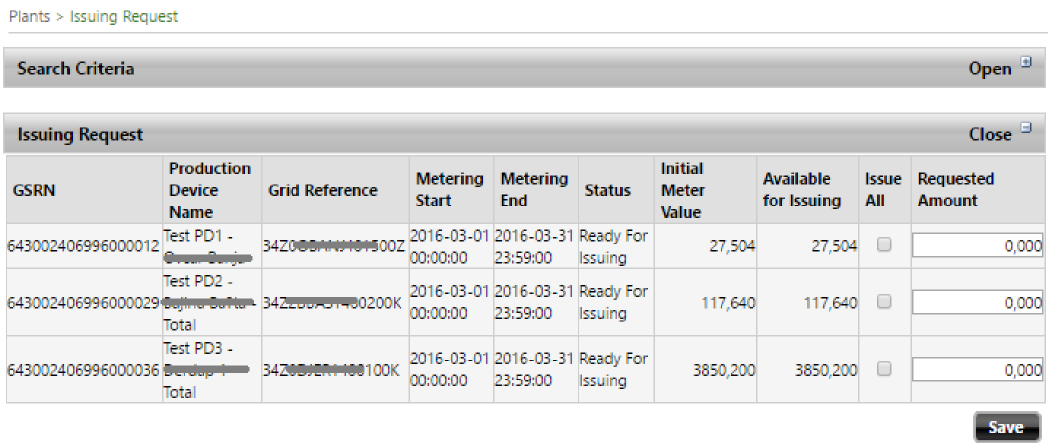


Figure 5.32 – Issuing Request Search


Plants > Issuing Request

Search Criteria Open

Issuing Request Close

GSRN	Production Device Name	Grid Reference	Metering Start	Metering End	Status	Initial Meter Value	Available for Issuing	Issue All	Requested Amount
643002406996000012	Test PD1 - [redacted]	34Z0[redacted]00Z	2016-03-01 00:00:00	2016-03-31 23:59:00	Ready For Issuing	27,504	27,504		0,000
643002406996000029	Test PD2 - [redacted] - Total	34Z[redacted]0200K	2016-03-01 00:00:00	2016-03-31 23:59:00	Ready For Issuing	117,640	117,640		0,000
643002406996000036	Test PD3 - [redacted] Total	34Z[redacted]100K	2016-03-01 00:00:00	2016-03-31 23:59:00	Ready For Issuing	3850,200	3850,200		0,000

Save

Figure 5.33 – Issuing Request Search Results

Table 5-12 – Issuing Request Search Results fields

Name	Description
GSRN	The GSRN of the PD
Production Device Name	The name of the PD
Grid Reference	The code that identifies the metering point
Metering Start and End	The period when the energy was produced
Status	The current status of the meter reading value: • Ready for Issuing – The energy is ready to be issued • Issued – The energy was issued
Initial Meter Value	The total meter reading value (energy produced) during selected period.
Available for Issuing	The total amount of energy that is still available for issuing. It may equal the volume in *Initial Meter Value* column if no issuing request for the period was done before.
Issue all	Select this checkbox to request issuing of all the volume shown in *Available for Issuing* If selected, it is not possible to add a volume in the *Requested Amount* field.
Requested Amount	Input the volume you would like to request issuing.
Actions	
Save	Click to save your requested issuing volumes

6 MANAGING CERTIFICATES

6.1 Workflow Description

The Issuing Body issues certificates for electricity units produced by a Production Device. These certificates are credited to the issuing Account of an Account Holder. The user with sufficient rights can make the following Certificate Transactions:

- **Transfer**: Transfer the certificates to another Account held by this AH itself; or held by another AH in the same Domain
- **Cancel**: Cancel the certificates to compensate electricity consumed.
- **Import**: Receive certificates from another AH outside the Domain.
- **Export**: Transfer certificates to another Account Holder outside the Domain

Transfer and Cancel Transactions can be scheduled to occur under specific conditions or on the request of the Account Holder.

6.2 Accounting and Transactions of Certificates

All Account Holders hold a Default Account. Users with specific rights can create Accounts and sub-Accounts. By default, the newly created Account will be active. Certificates that have been issued for the electricity produced by a Production Device are credited to the default Account of the Account Holder, if the issuing account hasn't been changed. These certificates can be Transferred or Cancelled. The Accounts can be:

- **Active/Inactive**: Accounts can be set as inactive, if it is not needed anymore and if it does not hold certificates or active sub-Accounts. By default, the inactive Accounts are not listed in the Account list view. No certificates can be transferred to this Account.

  Note: The default Account cannot be set as inactive.

- **Locked/Unlocked:** in certain cases, the Issuing Body can lock an Account. Locked Accounts can be seen by the Account Holder in the Account list with a locker icon next to it, . No operations can be performed in this account (edit, create scheduler, move the account or create a subaccount to it) and you cannot transfer the certificates from this account. However, it is possible to transfer certificates internally (within the same AH) and externally (from another AH) to a locked Account.

- **Public**: Accounts that are public are visible to other Account Holders. Hence inter Account Holder Transfers are possible only with Accounts that have been declared Public.

Note: The Public status of the default Account cannot be changed.

Accounts can also have one or more sub-Accounts that have the same characteristics as the parent Account. Each of the sub-Accounts can hold their own certificates. A parent-child relationship is displayed in the list of Accounts. The default Account cannot be moved to the sub-Account of another Account.

As discussed earlier, certificates issued for production of a specific PD are credited to the Account Holder's issuing Account for that Production Device, which is by default the default Account. The Account Holder can Transfer some or all the certificates to different Accounts. These Transactions are classified depending on the nature of the Account, as described below:

- **Transfer**: the receiving Account belongs to another Account Holder of the same Domain.
- **Internal Transfer:** the receiving Account belongs to the same Account Holder.
- **Export**: the receiving Account belongs to another Account Holder in another Domain.
  In the case of Export outside this Registry, the Transaction is deemed as successful only if the system receives an acknowledgement message from the receiving system. Such certificates are no longer held by the current Account Holder. However, if a negative acknowledgement message is received, i.e. the receiving Registry or counterparty has rejected the Export, a new Transaction type called "Correction" is created and the respective certificates are returned to the Account.
- **Import**: certificates are transferred into the Account from another Domain.
- **Cancel**: the certificates are taken out of circulation to prove electricity consumption with certain attributes (for example consumption of renewable electricity). These certificates are then no longer available for the current Account Holder.
- **Issue**: the Issuing Body issues certificates against the electricity produced by a Production Device.

Note: Export and cancellation transactions should be initiated 10 business days before the expiry of any certificate to be included in the transaction, to avoid expiry of certificates in the course of the transaction.

6.3 Access to Certificates Modules

Refer to Figure 3.1 for the permissions assigned to the roles for executing the functionalities available under the **EECS-GO** module.

The **Manage Accounts** option is displayed by default when entering the certificate module. It enables you to view the Accounts held by an Account Holder and execute operations and Transactions on them. The ID displayed alongside the heading is the Member Code of the Account Holder (Figure 6.1).

6.3.1 View Accounts

Navigate to **EECS-GO>Manage Accounts**.

In managing Accounts, the details of only those Accounts for which the user has read rights are displayed (Figure 6.1 and Table 6-1). Some records exhibit in the start of the line. This indicates that the Account has one or more sub-Accounts under it. Click the icon to expand the hierarchy.

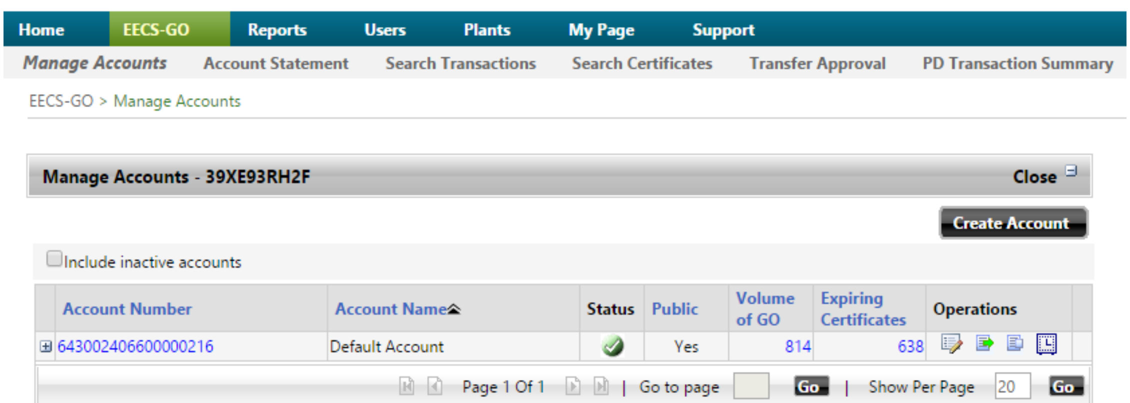


Figure 6.1 – Manage Accounts: View Account List

Table 6-1 – View Account List: Field Description

Name	Description
Include inactive Accounts	Click to display details of inactive Accounts also. By default this is not selected.
Account Number	Click this link to view the complete Transaction details of this Account for a default period of one year. Refer to Account Statement for more details.
Account Name	Name of the Account. Not visible to other Account Holders.
Status	Indicates whether the Account is active or not.

Public	Yes — the Account will be visible to other Account Holders No — the Account will not be visible to other Account Holders
Volume of GO	Number of certificates held currently in this Account. Click this to Transfer/Cancel these certificates from this Account.
Expiring Certificates	Number of certificates that will expire soon (usually within a month time).
Action Links	
Operations	Click to Modify Account Click to Move Account Click to Create Sub-Account Click to Schedule Transaction

6.3.2 Modify Account

This option is used to change the Active and Public status of an Account. This also permits a change in the Account Name.

1. Navigate to **EECS-GO>Manage Accounts**.
2. Click icon available under Operations for the required Account (Figure 6.1).

Note: The default account is not editable.

3. Enter new Account Name, if required (Figure 6.2).
4. Change the status of **Active**, if required. An Account can be set as inactive if it does not hold any certificates and is not required any more. An active account is marked with a icon on the status column and an inactive account with an icon.
5. Change the status of **Public**, if required.

Note: Only Public Accounts are visible to other Account Holders.

6. Click **Update** to save the changes or click **Back** to return to the Manage Accounts page without saving the changes.

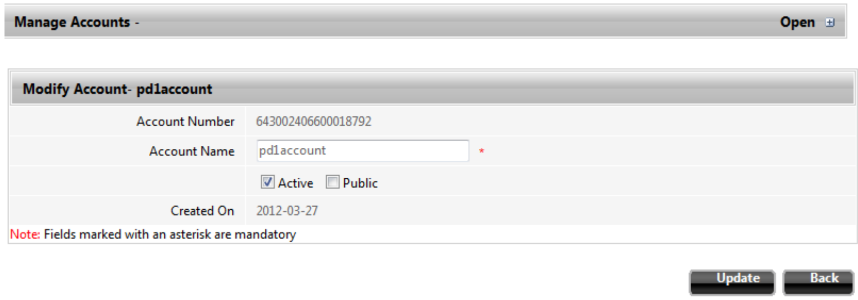


Figure 6.2 – Certificates: Modify Account

6.3.3 Move Account

This option enables you to move an entire Account to render it as a sub-Account of another one. The details of this Account will now be visible as a child Account under the Destination Account.

Note: The default Account cannot be moved.

1. Navigate to **EECS-GO>Manage Accounts**.
2. Click icon available under Operations for the required Account.
3. Enter or select the Account from the Destination Account box (Figure 6.3).
4. Click **Move** to execute the movement. Click **Back** to return to Manage Account page without moving the Account.

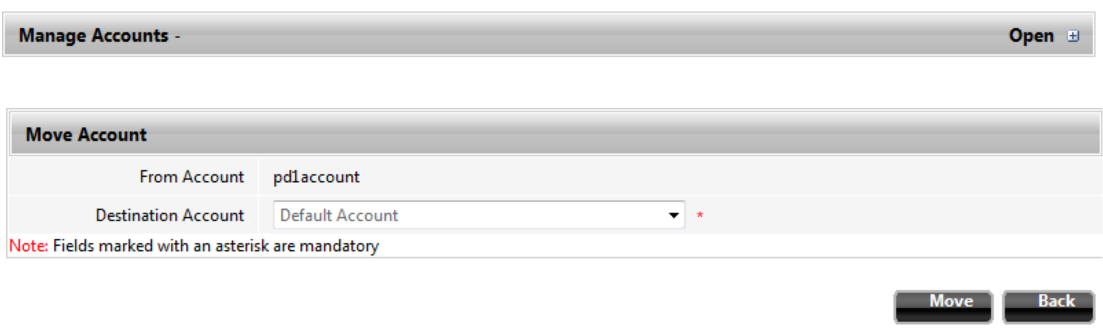


Figure 6.3 – Certificates: Move Account

6.3.4 Create Accounts

A default Account is created automatically for every Account Holder, when an Account Holder is created. In addition to this, the user can subsequently create new Accounts. The newly created Account is active by default.

1. Navigate to **EECS-GO>Manage Accounts**.

2. Click **Create Account** (Figure 6.1).
3. Enter the **Account Name**. The system automatically generates an Account Number.
4. Set status as public if the Account should be visible for other Account Holders for transfer.

Note: If an account is set to Public, other account holders can see the account number and its name

5. Click **Create** to complete the process. (Figure 6.4).
6. Click **Back** to return to Manage Accounts page, without effecting any changes**.**
7. Click **Reset** to enter a new set of specifications.

Note: The newly created Account is Active by default.

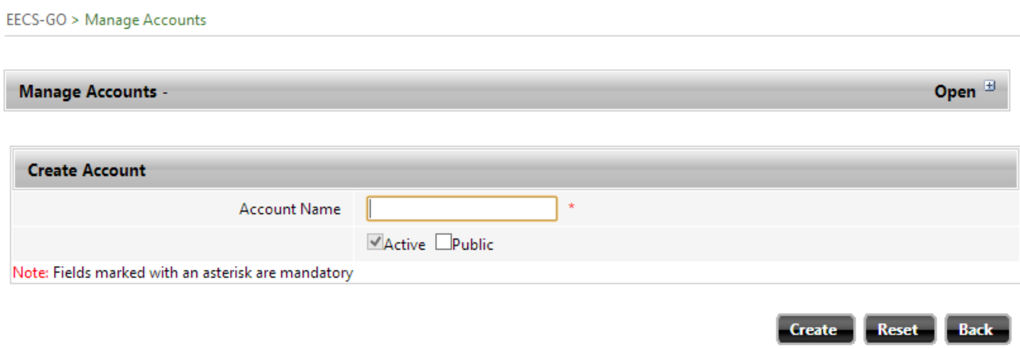


Figure 6.4 – Manage Account: Create Account

6.3.5 Create Sub-Account

This option allows you to create a sub-Account under an existing Account.

1. Navigate to **EECS-GO>Manage Accounts**.
2. Click icon available under Operations for the required Account.
3. Enter the Account name for the new sub-Account (Figure 6.5).
4. By default, the sub-Account inherits the Active Status and the Public Status from the parent Account.
5. Click **Create** to create the Account. Click **Back** to return to the Manage Accounts page without creating a sub-Account.

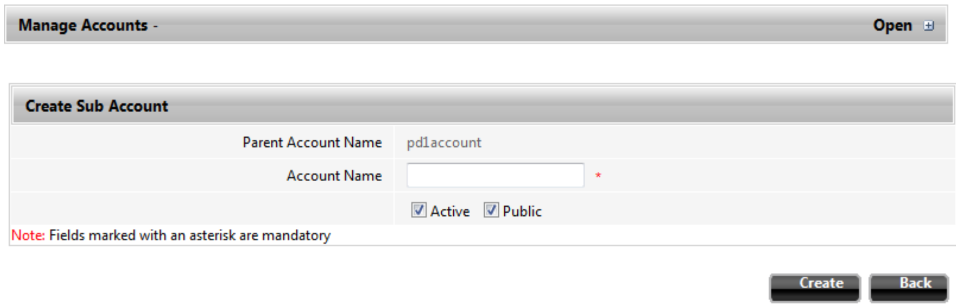


Figure 6.5 – Certificates: Create Sub Account

6.4 Certificate Transactions

6.4.1 Transfer Certificates

This option enables you to Transfer all or some of the certificates from one Account to another.

1. Navigate to **EECS-GO>Manage Accounts**.
2. Click the number under the **Volume of GO** column for the required Account.
3. You can filter certificates for transfer by bundle, by Production Device, or by account they are currently located in. By default no filter is applied by “Select all” certificates option being selected (Figure 6.6).
4. For example to select the exact bundles, click the **Select certificates by bundle** option.
   - The list of Certificate Bundles held by this Account is displayed (Figure 6.7). (For more information on this view refer to the description given in Chapter 6.8 Search Certificates)
   - Select the required bundles by checking the corresponding checkboxes.
5. Click 

 to move to Transfer page. The Certificate Transfer page is displayed in Figure 6.8.
6. Enter the number of certificates to be Transferred (Figure 6.8).
7. You can either choose to enter a specific Account number or select one (Figure 6.8).
   - To select an Account number, select **Domain**, **Account Holder** and **Account** from the drop-down box.
   - To enter an Account number, click **Enter Account number**. Enter the **Account number** in the text box. Click **Validate Account Number** to get the Account number validated.
8. To leave a message to the recipient of the certificates, write it in the field Message to receiver

9. Click **Transfer** to complete the Transaction or click **Back** to return to the list of Filters (Figure 6.8).

Notes: All receiving Accounts have to be pre-registered in the system. In case the Account cannot be found, please contact technical support to have the Account added to the system.

Export and cancellation transactions should be initiated 10 business days before the expiry of any certificate to be included in the transaction, to avoid expiry of certificates in the course of the transaction.

While selecting certificates to transfer, the oldest certificates will be selected first if the user does no other selection.

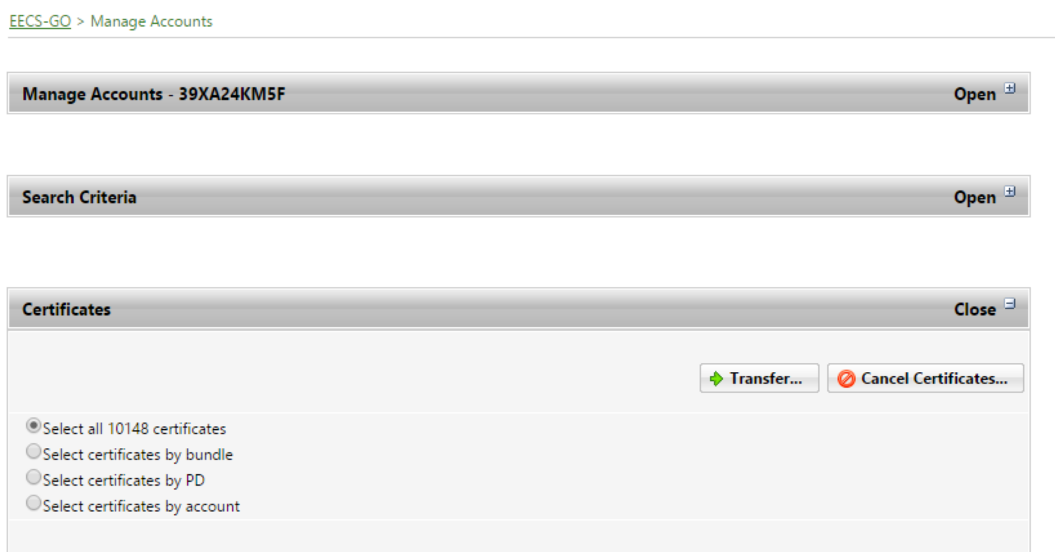


Figure 6.6 – Transfer Certificates: Select all

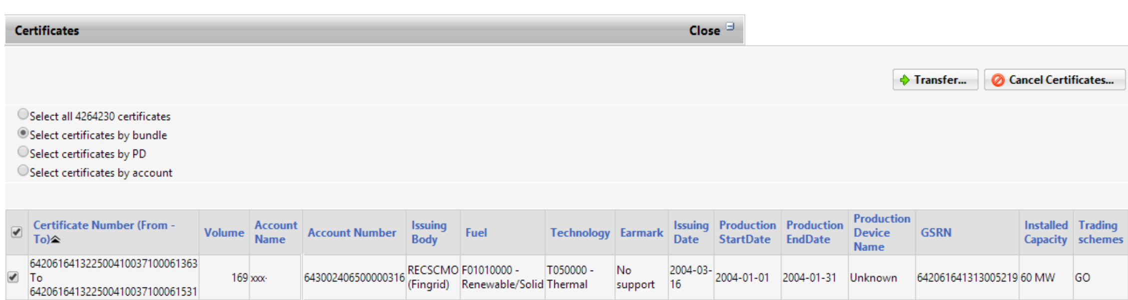


Figure 6.7 – Transfer Certificates: Select by bundle

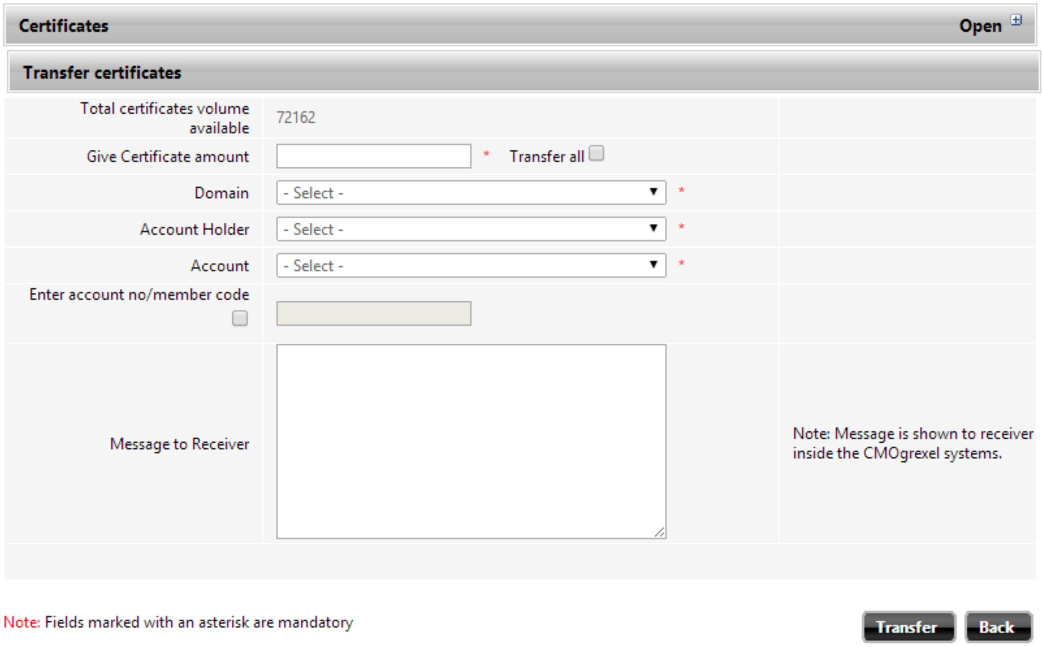


Figure 6.8 – Certificate Transfer

6.4.2 Cancel Certificates

EECS-GO certificates can be cancelled from the system as follows.

1. Navigate to **EECS-GO>Manage Accounts**.
2. Click the number under the **Certificate Count** column for the required Account.
   - The actions involved in Cancelling are similar to those in Transferring. Thus same figures will be used for reference.
3. You can filter certificates for Cancel by bundle, by PD or by account (Figure 6.6).
4. To Cancel a part of the certificates, click Select certificates by bundle, Select certificates by PD or Select certificates by account
   - If e.g. **Select certificates by bundle** is selected, the list of Certificate Bundles held by this Account is displayed (Figure 6.7). (For more information on this view refer to the description given in Chapter 6.8 - Search Certificates.)
   - Click **Select** to select the required certificates.
5. Click 

to move to cancel page. The Certificate Cancellation page is displayed (Figure 6.9). Description of input data presented in Table 6-2.
6. Enter the Cancellation data in the Cancellation screen.
7. Click **Cancel Certificates** to complete the Transaction or click **Back** to return to the list of Filters (Figure 6.9).

Note: Export and cancellation transactions should be initiated 10 business days before the expiry of any certificate to be included in the transaction, to avoid expiry of certificates in the course of the transaction.

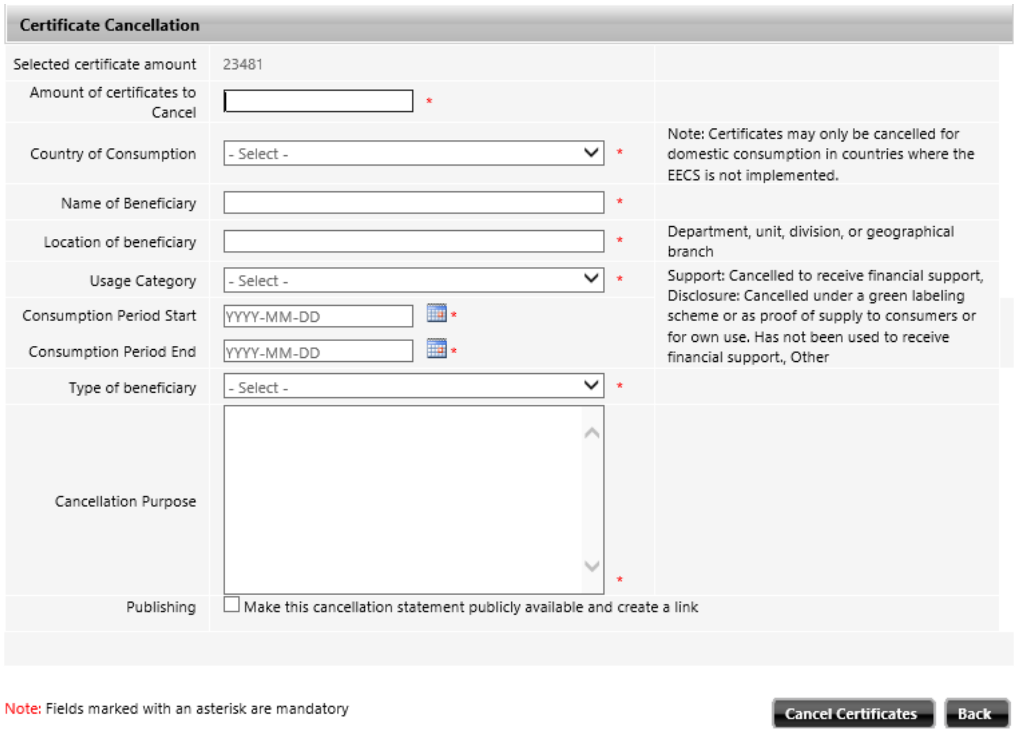


Figure 6.9 – Certificate Cancellation

Table 6-2 Certificate Cancelling (mandatory fields marked with an asterisk)

Name	Description
Selected Certificates Count	Number of certificates in the current selection. Can be modified only by making a new selection
Amount of certificates to Cancel *	Number of certificates to be Cancelled of the current selection.
Country of Consumption *	The country where this electricity has been consumed. Certificates may only be Cancelled for domestic consumption or for consumption in countries where the EECS is not implemented.
Name of Beneficiary *	The company to which this electricity was sold to or by whom it was sold.
Location of Beneficiary *	More detailed information of the Beneficiary like department unit, division, or geographical branch.
Type of Beneficiary *	Select from dropdown list.

Consumption Period *	Select the Start and End day of the time period of electricity consumption for which the certificates are Cancelled for.
Usage Category *	Select the usage category of electricity origin Certificate Cancellation purpose from dropdown list: Support: Cancelled to receive financial support Disclosure: Cancelled under a green labelling scheme or as proof of supply to consumers or for own use. Has not been used to receive financial support. Other: other usage Category
Cancellation Purpose *	Enter text to indicate the reason for Cancellation.
Publishing	Select this check box if you which to create a public available link for this cancellation. This link can, for example, be given to customers who do not have access to CMO.grexel and wish to see the cancellation statement **Note:** Publishing the Cancellation Statement is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.

6.4.3 Schedule Transaction

The system enables an Account Holder to program Transactions based on some pre-specified events. This schedule can be repeated periodically.

1. Navigate to **EECS-GO>Manage Accounts**.
2. Click  icon available under Operations, for the required Account.
3. The existing schedule, for this Account is displayed (Figure 6.10). Field description presented in Table 6-3. If no transactions are scheduled, a corresponding message is shown.

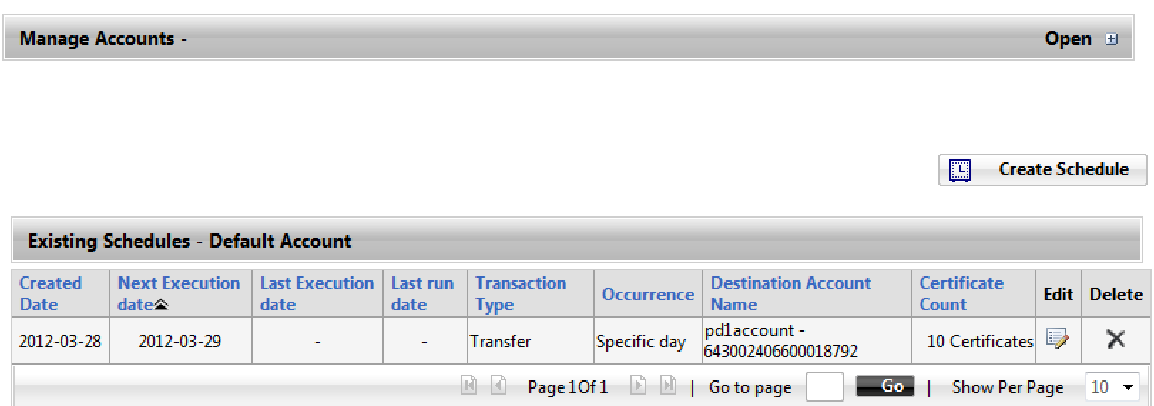


Figure 6.10 – Manage Accounts: Schedule Transactions

Table 6-3 – Existing Schedules: Field Description

Name	Description
Created Date	Date on which the schedule was created
Next Execution Date	The next execution date of the transaction
Last Execution Date	The last execution date of the transaction
Last Run Date	The most recent execution date of the transaction
Transaction Type	The type of the transaction (Transfer/Cancel)
Occurrence	The occurrence of the transaction
Designation Account Name	Destination Account Name
Certificate Count	Number of certificates to be transacted
Action Links	
Create Schedule	Click to Create Schedule
Edit	Click to Edit Schedule
Delete	Click to Delete Schedule

6.4.3.1 Create Schedule

1. Navigate to **EECS-GO>Manage Accounts>**  for the required Account.
2. Click 

 to schedule a new activity (Figure 6.10).
3. Create Schedule frame is displayed. The fields displayed vary with the selection made for the fields.
4. Figure 6.11 shows the frame displayed if the Transaction type **Transfer** is selected to occur monthly.
5. Figure 6.12 shows the frame displayed if the Transaction type **Cancel** is selected to occur Daily. Refer to Table 6-4 for the description of fields.
6. Click **Create** to complete the process.
7. Click **Back** to return to the Manage Accounts page without effecting any changes.
8. Click **Reset** to enter a new set of specifications.

Note: Export and cancellation transactions should be initiated 10 business days before the expiry of any certificate to be included in the transaction, to avoid expiry of certificates in the course of the transaction.

When creating a scheduler, the receiving account eligibility is not validated. E.g. if the certificates cannot be transferred because the receiving account doesn't accept the certificate trading scheme or because the receiving account is locked, no error message will be shown. The failed schedule transfer can be seen in the Activity log.

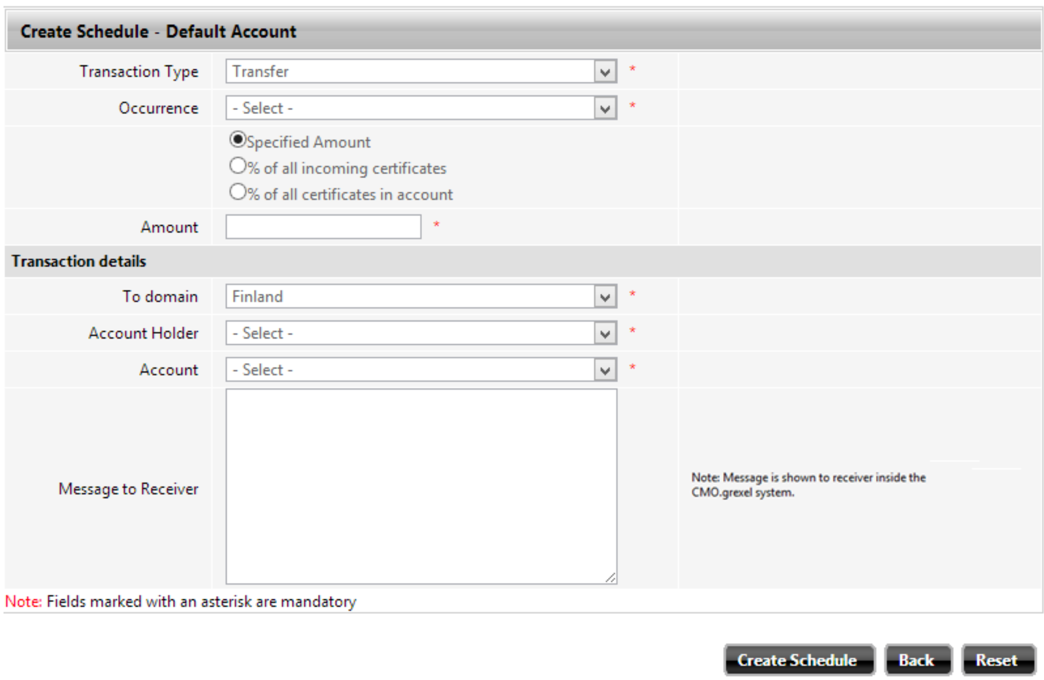


Figure 6.11 – Certificates: Create Schedule (Transfer)

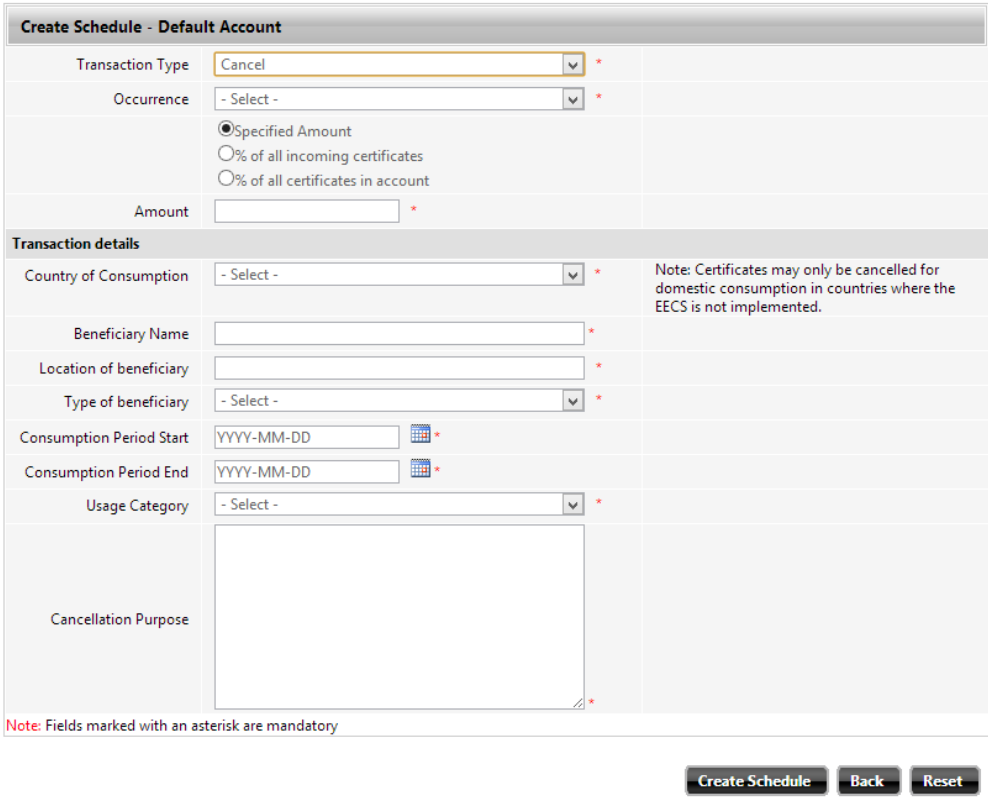


Figure 6.12 – Certificates: Create Schedule (Daily Cancellation)

Table 6-4 – Create Schedule: Field Description (mandatory fields marked with an asterisk)

Name	Description
Transaction Type *	Select Transfer or Cancel (if a field in this table is only relevant to one of the Transaction types, it will be marked with T or C at the end of field name)
Occurrence *	Select : Specific day — Selected event occurs only on a specific date. Specific day of each month—Selected event occurs on the specified day of the month till the stop date. On Issue — Selected event occurs on issue of certificates to this Account. On Incoming Transaction — Selected event occurs when certificates are transacted to this Account.
Specified amount/ % of all certificates in Account/ % of incoming Certificates	The amount of certificates to be transacted. The option “Incoming Certificates” is available only if Occurrence is selected as On Transfer or On Issue.

Percentage (0%-100%)*	The required percentage of certificates to be transacted. Available if the choice is either “% of all certificates in Account” or “% of all incoming certificates”.
Amount *	The required number of certificates to be transacted. Available if the choice is Specified Amount.
Execution Date *	The execution date of the Transaction. Available if the Occurrence is set as Specific day.
Stop Date *	The date up to which the scheduled Transaction will be executed. Available if the Occurrence is set as other than Specific day.
Day of Month *	The day on which the Transaction will be executed every month. Available if the Occurrence is set as Specific day of each month.
To Domain (T) *	The Domain to which the certificates will be Transferred.
Account Holder (T) *	The Account Holder to which the certificates will be Transferred.
Account (T) *	The Account of the AH to which the certificates will be Transferred
Message to Receiver (T)	A free-form message to the receiver about the Certificate Transfer.
Country of Consumption (C) *	The country to which the certificates will be Cancelled.
Beneficiary Name (C) *	The actor to which the certificates will be Cancelled.
Department, unit, division, or geographical branch (C) *	More detailed information of the Beneficiary.
Type of Beneficiary (C) *	The type of the Beneficiary (Energy supplier or end-consumer).
Consumption Period (C) *	The Start and End Dates of the consumption period of the electricity for which the certificates are being Cancelled.
Usage Category (C) *	Select a usage category from the dropdown list. For more detailed information refer to Table 6-2.
Cancellation Purpose (C) *	Enter text to indicate the reason for Cancellation.

(T) – Transaction (C) – Cancellation

6.4.3.2 Edit Schedule

1. Navigate to **EECS-GO>Manage Accounts>** for the required Account.
2. Click **Edit** to make changes in an existing schedule (Figure 6.13).

Note: When editing a schedule, you cannot change the Transaction Type (from Transfer to Cancel or vice-versa)

3. Refer to Schedule Transaction for field description details.
4. Click **Update** to complete the process.
5. Click **Back** to return to Manage Accounts page, without effecting any changes**.**
6. Click **Reset** to enter a new set of specifications.

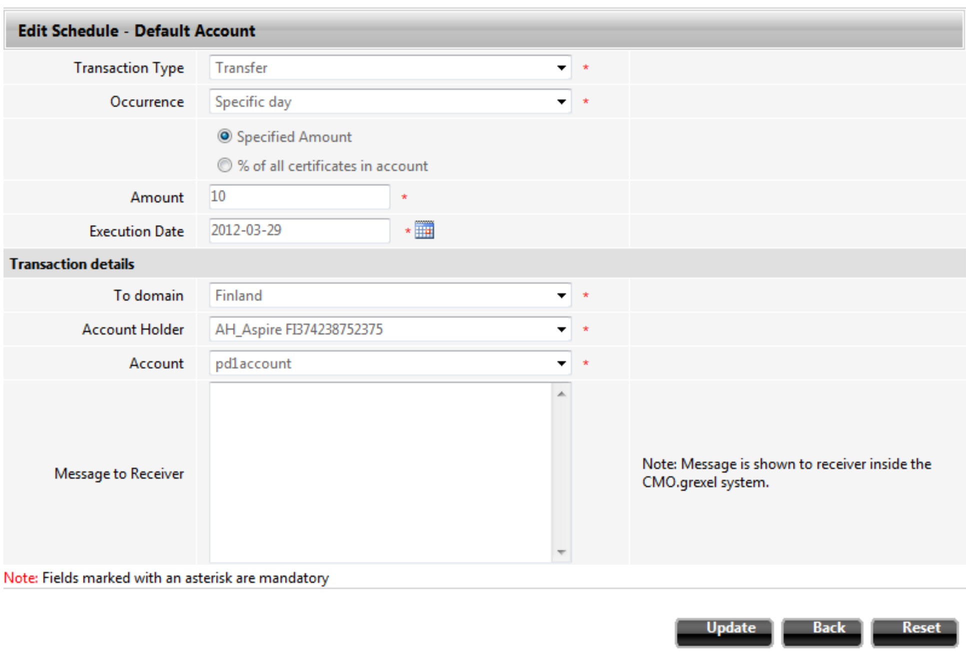


Figure 6.13 – Certificates: Edit Schedule

6.4.3.3 Delete Schedule

1. Navigate to **EECS-GO>Manage Accounts>** for the required Account.
2. To delete an existing schedule, click the **Delete** icon of the schedule to be deleted.

6.4.4 Four Eye Approval*

Note: *Four Eye Approval is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.

Account Holders can choose to have an extra approval for Certificate transfers before they are performed. To enable this, the **Four Eye Approval Required** checkbox has to be checked in the Organization details (**My Page>Manage My Organization>Edit**) by the AH Root user (see Chapter 4.2.1). If it is checked, AH Account Viewer users can initiate transfers, which have to be approved by AH Root or AH Account Administrator users before they are executed.

It is also possible to allow AH Account Viewer users to perform internal transfers (transfers between the same Account Holder) without four Eye approval. In this case, the **Internal Transactions Without Four Eye Approval** checkbox has to be checked in the Organization details (**My Page>Manage My Organization>Edit>General**) by the AH Root user (see Chapter 4.2.1).

Note: If "Four Eye Approval Required" is disabled and "Internal Transactions without Four Eye Approval" is disabled, the AH account viewer user is not able to make any transactions

If "Four Eye Approval Required" is enabled and "Internal Transactions without Four Eye Approval" is disabled, the AH account viewer user is able to initiate transactions but Four eye approval is required

If "Four Eye Approval Required" is disabled and "Internal Transactions without Four Eye Approval" is enabled, the AH account viewer user is able to make only internal transfers without four eye approval

If "Four Eye Approval Required" is enabled and "Internal Transactions without Four Eye Approval" is enabled, the AH account viewer user is able to initiate transactions, but only internal transfers are completed without Four Eye Approval Required

Note: If a user has a combination of roles (e.g. AH Account Admin and AH Account Viewer), the transaction will not be set to Pending Approval as the user has a higher hierarchy role (Admin) besides the Viewer role. It should be noted, however, that combination of roles as the one in this example is sometimes unnecessary. See Figure 3.1 for the user role matrix.

6.4.4.1 Initiate a Transfer (AH Account Viewer)

1. To initiate a transfer as an AH Account Viewer user, log in to the system and navigate to **EECS-GO**.
2. Click the **Certificate Count** for the required Account, specify the transaction details and initiate the transaction. A message indicating the successful initiation is shown.

Note: AH Account Viewer users can also initiate scheduled transfers.

6.4.4.2 Approve a Transfer (AH Root/AH Account Administrator)

1. To approve an initiated Transfer, log in as the AH Root or AH Account Administrator user of your Organization. If a Transfer has been initiated, an item about Transfer confirmation is

added to the Pending Tasks list (Figure 6.14). A user can subscribe to email alerts of transfers pending (see Chapter 2.3 for more information).

2. Navigate to **EECS-GO>Transfer Approval.** Initiated transactions are shown with the status 'Pending Approval' (Figure 6.15).

Note: Transfer Approval submenu is only visible if the organization has For Eye Approval option ON under My Organization details.

3. Initiated transactions can be approved or rejected separately or all at once. To approve or reject one specific transaction, click the **Transaction Date link** and click **Approve** or **Reject**. A message about the approval/rejection is shown.
4. In the Transfer Approval list, approved transactions are shown with the status 'Completed' and rejected transactions are shown with the status 'Failed'. If the transaction is an export, the status will first be 'Started', and if the export is completed successfully, the status will be 'Completed'.

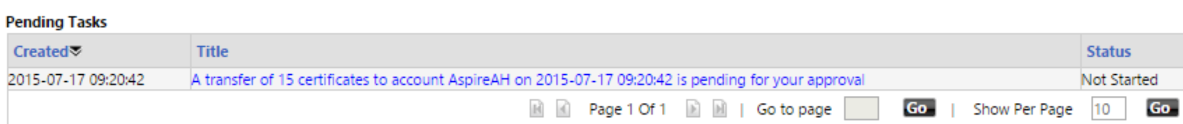


Figure 6.14 – Approve a Transaction (Pending Tasks)

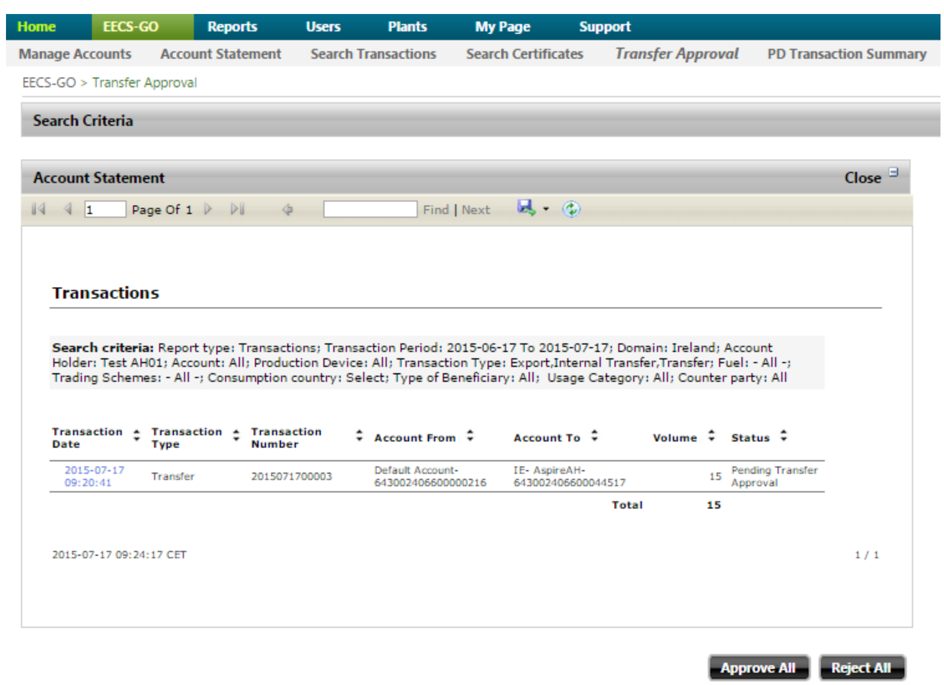


Figure 6.15 – Approve a Transaction (Transfer Approval)

6.5 Account Statement

This option gives complete details of the Transactions in an Account.

To view the details of an Account, within the purview of your rights:

1. Navigate to **EECS-GO>Account Statement** (Figure 6.16). By default the details for one month, dating back from today of the Default Account, are displayed in the search criteria.
2. If necessary, change the search details. You may view the Account Statement of all accounts at once by selecting "All" in the Account dropdown,
3. Click **Search.**

You can either select **Transactions** where all transaction are seen or **Transactions overview** for a general overview of completed transactions.

4. The details of the Account include the basic information of the Account and the Transaction details (Figure 6.17, Figure 6.18 and Table 6-5).
5. For each Transaction, hyperlinks are provided to view the details of the certificates and the Transaction.
6. You can Export the details to an Excel sheet or a PDF file by clicking the **Export** button and choosing the suitable option.

Note: The Account Statement is shown even if there is no transaction during the selected period

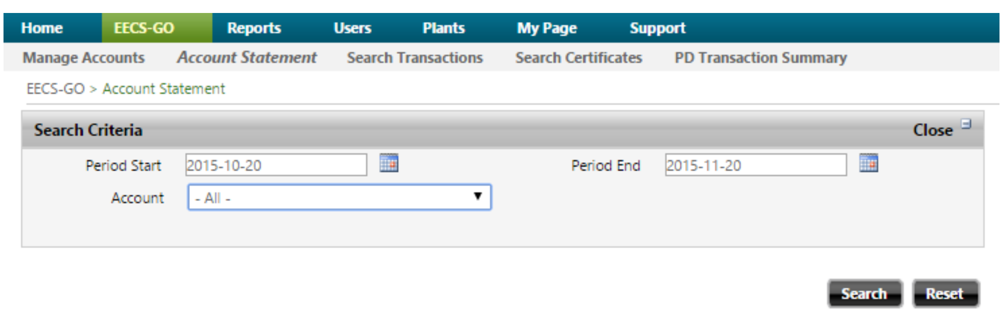


Figure 6.16 – Account Statement search criteria

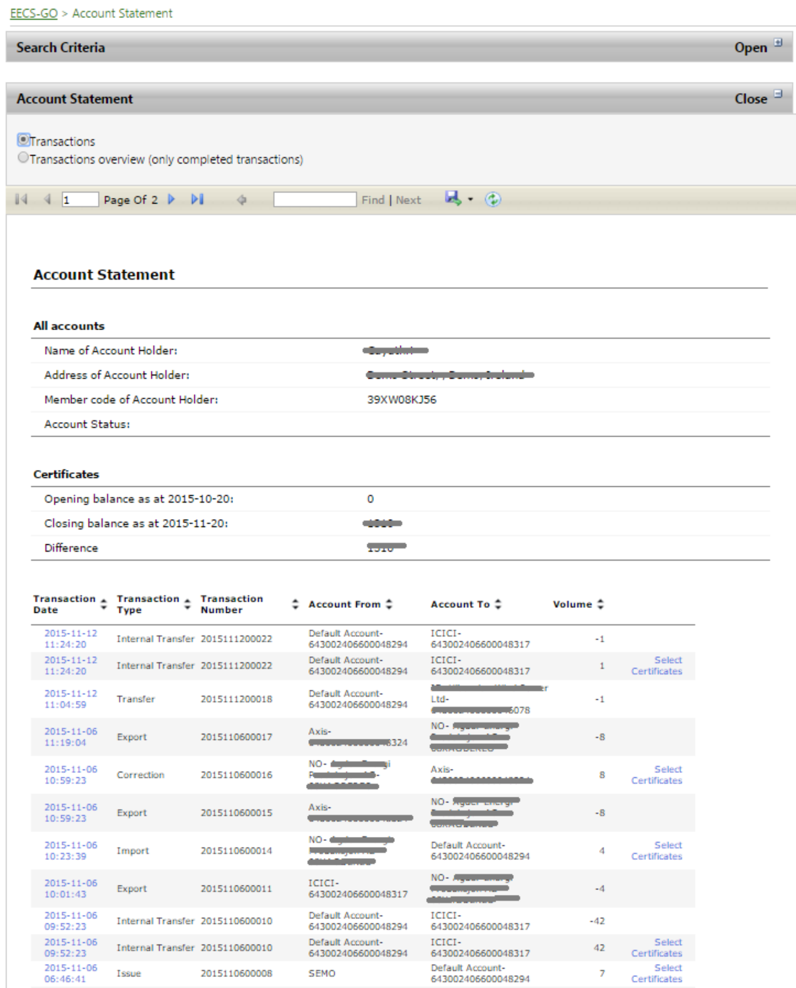


Figure 6.17 – Account Statement (transactions)

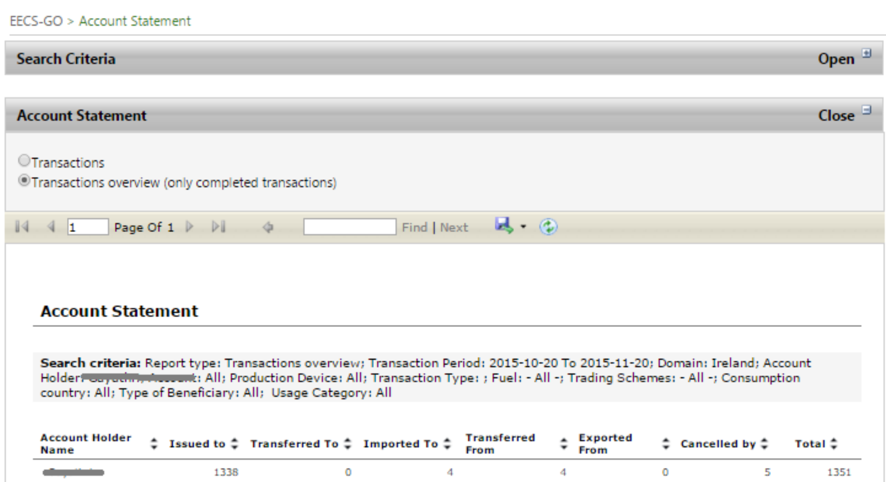


Figure 6.18 – Account Statement (transactions overview)

Table 6-5 – Account Statement: Field Description

Name	Description
Name of Account Holder	Account Holder Name
Address of Account Holder	Account Holder Address
Member Code of Account Holder	Account Holder Member Code
Issuing Body Comment	Message of from the IB if needed
Account Status	Active / not active, Public / not public account
Opening Balance	No. of certificates on hand, on the start of the period.
Closing Balance	No. of certificates on hand, at the end of the period.
Difference	Certificate inflow / outflow during the period.
Transaction Date	Date and time of Transaction. Click to View Transaction details.
Transaction Type	The nature of the Transaction
Transaction Number	The ID of the transaction (unique).
Account From	Account number from which the Transfer has been executed. If the source Account is your Account, then Account name and number will be displayed. If the Account is that of an AH in the same Domain, then the name and Account number of the AH will be displayed. If the Account belongs to an AH of other Domain, the Domain name, AH name & Account number will be displayed.
Account To	Account number to which the Transfer has been executed. The details displayed follow the rule explained above.
Volume	Number of certificates included in the Transaction. The volume can be negative or positive.
Select Certificates	Click to Select Certificates. This option is available only for Transactions that have resulted in Transfer of certificates to this Account. Using this option, you can select the certificates which were involved in this Transaction (even if they are currently located in another own Account). However, if these have since then been Transferred to an Account belonging to another Account Holder, i.e. they no longer belong to this Account Holder, then this link will still be shown but the certificates can no longer be found.

6.6 Search Transactions

This option enables you to locate and view the details of a specific Transaction.

1. Navigate to **EECS-GO>Search Transactions** (Figure 6.19)
2. Determine the search criteria (described in Table 6-6).

Note: If you have filtered the search by Production Device, the result set includes those whole transactions, which incorporate certificates from selected Production Device(s). The total volumes of the transactions are shown even though the transaction might include certificates from other Production Device(s) than selected.

3. Click **Search**.
4. The resulting view will be similar to Account statement and are displayed on Figure 6.17.
5. The results can be filtered according to Table 6-7. And Figure 6.19 to Figure 6.21 present the different display options for each type of filter.

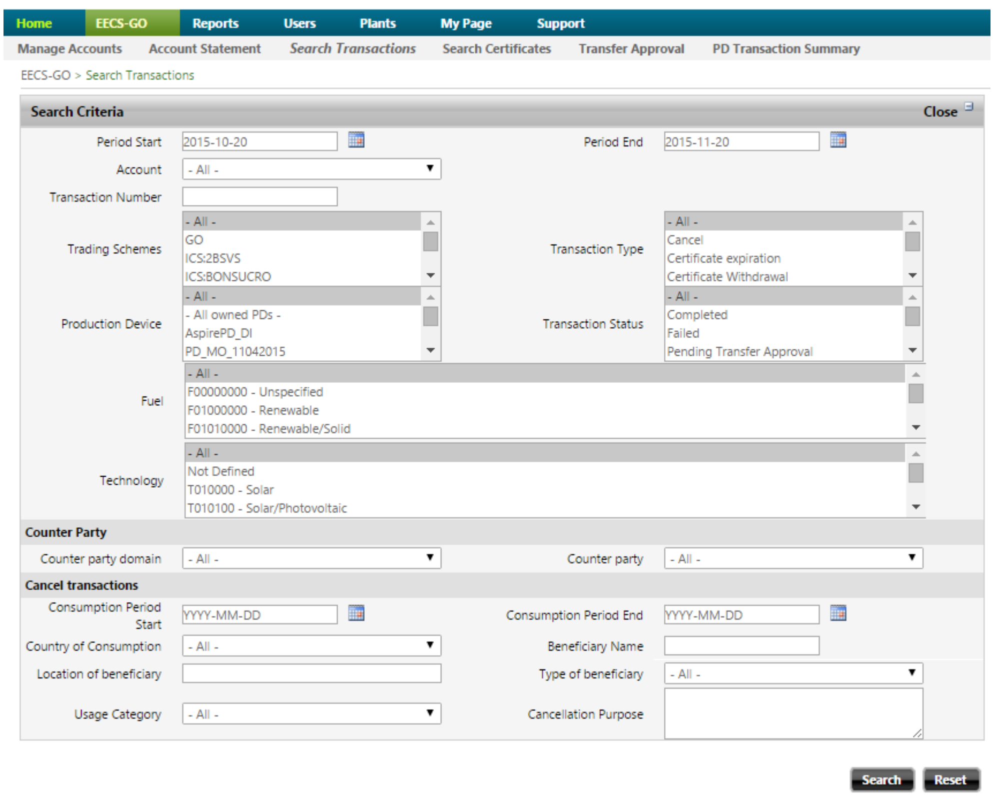


Figure 6.19 – Search Transactions

Table 6-6 – Search Transactions: field description

Field	Description
Period	The time period (Start and End Date) of the transactions.
Account	The Account associated with the transactions.
Transaction Number	The Transaction Number of a specific Transaction
Transaction Type	The Transaction Type(s) of the transactions
Production Device	The Production Device(s) associated with the transactions.
Trading Schemes	The trading Schemes of the certificates involved in the transaction
Transaction Status	The Transaction Status of the transactions.
Fuel	The Fuel(s) associated with the transactions.
Technology	The Technology associated with the transactions
Counter Party	
Counter Party Domain	Domain of the receiver
Counter Party	External Receiver/Sender of the transaction
Cancel Transactions search criteria	
Consumption Period	The Start and End Dates of the time period of electricity consumption for which the certificates have been Cancelled.
Country of Consumption	The country where the electricity has been consumed. Certificates may only be Cancelled for domestic consumption or for consumption in countries where the EECS is not implemented.
Beneficiary Name	The actor to which this electricity was sold to or by whom it was sold.
Location of Beneficiary	More detailed information of the Beneficiary such as department unit, division, or geographical branch.
Type of Beneficiary	The type of the cancellation beneficiary

Usage Category	Select the usage category of electricity origin Certificate Cancellation purpose from the dropdown list: **Support**: Cancelled to receive financial support **Disclosure**: Cancelled under a green labelling scheme or as proof of supply to consumers or for own use. Has not been used to receive financial support. **Other**: other usage Category
Cancellation Purpose	Enter text to indicate the reason for Cancellation.

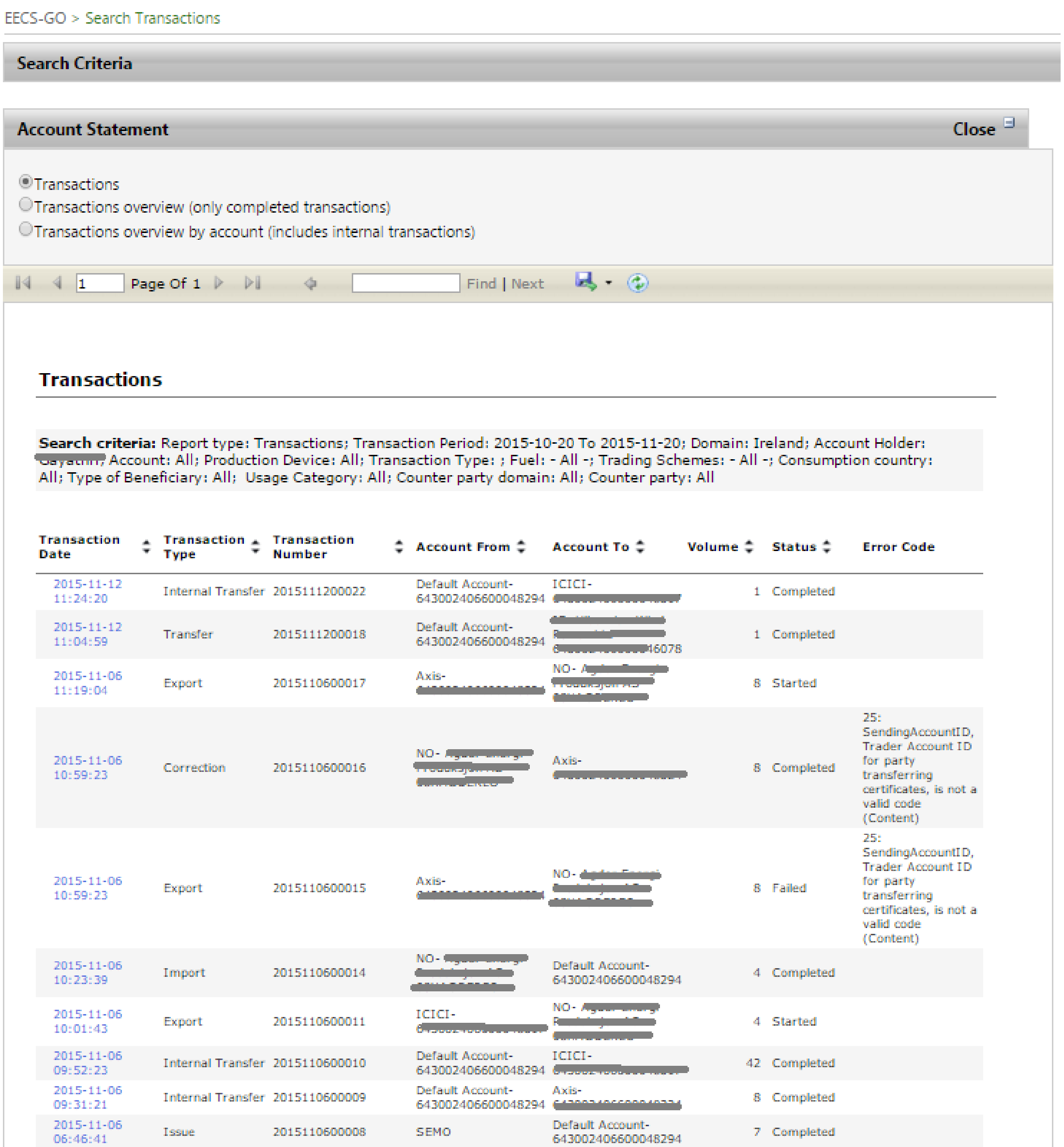


Figure 6.20 – Search Transactions results

Table 6-7 – Search Transaction Results Options: Field Description

Frame	Description
Transaction	All the transactions of account and based on search criteria
Transactions overview (only completed transactions)	All the completed transactions of account and based on search criteria. It groups the transaction by Account holder, transaction type and displays the result (Account holder X transaction type).
Transactions overview by account (includes internal transactions)	It contains same data in “Transactions” view. It grouped the transaction by account, transaction type and displays the result (Account X Transaction Type)

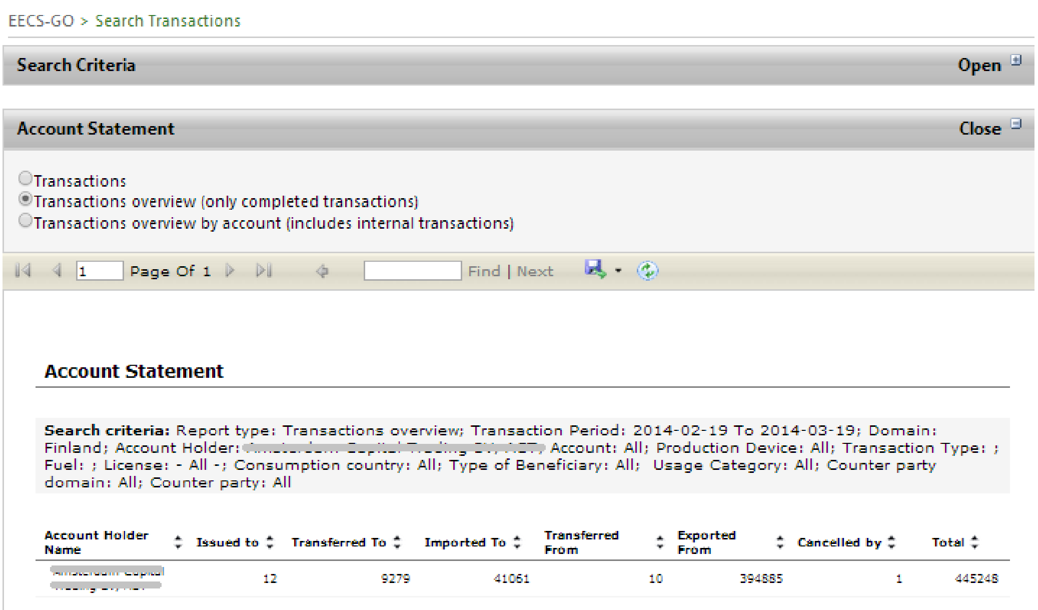


Figure 6.21 – Transaction Search results for Transactions overview

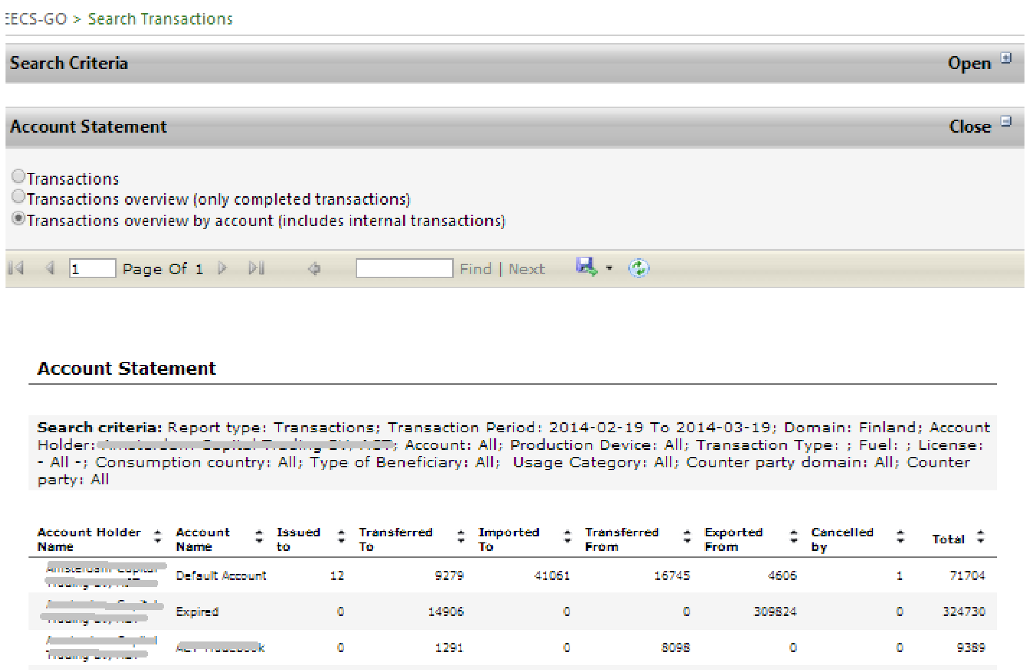


Figure 6.22 – Transaction Search results for Transactions overview by account

6.7 View Transaction Details

To view the details of a specific Transaction you can,

- Navigate from Search Transactions and click on Transaction Date (Figure 6.20) or
- Navigate from **Account Statement** and click on **Transaction Date** (Figure 6.17).

Figure 6.23 displays the details of the Transaction displayed. Field description is presented in Table 6-8).

Note: The details displayed in the Account Statement vary with the Transaction type.

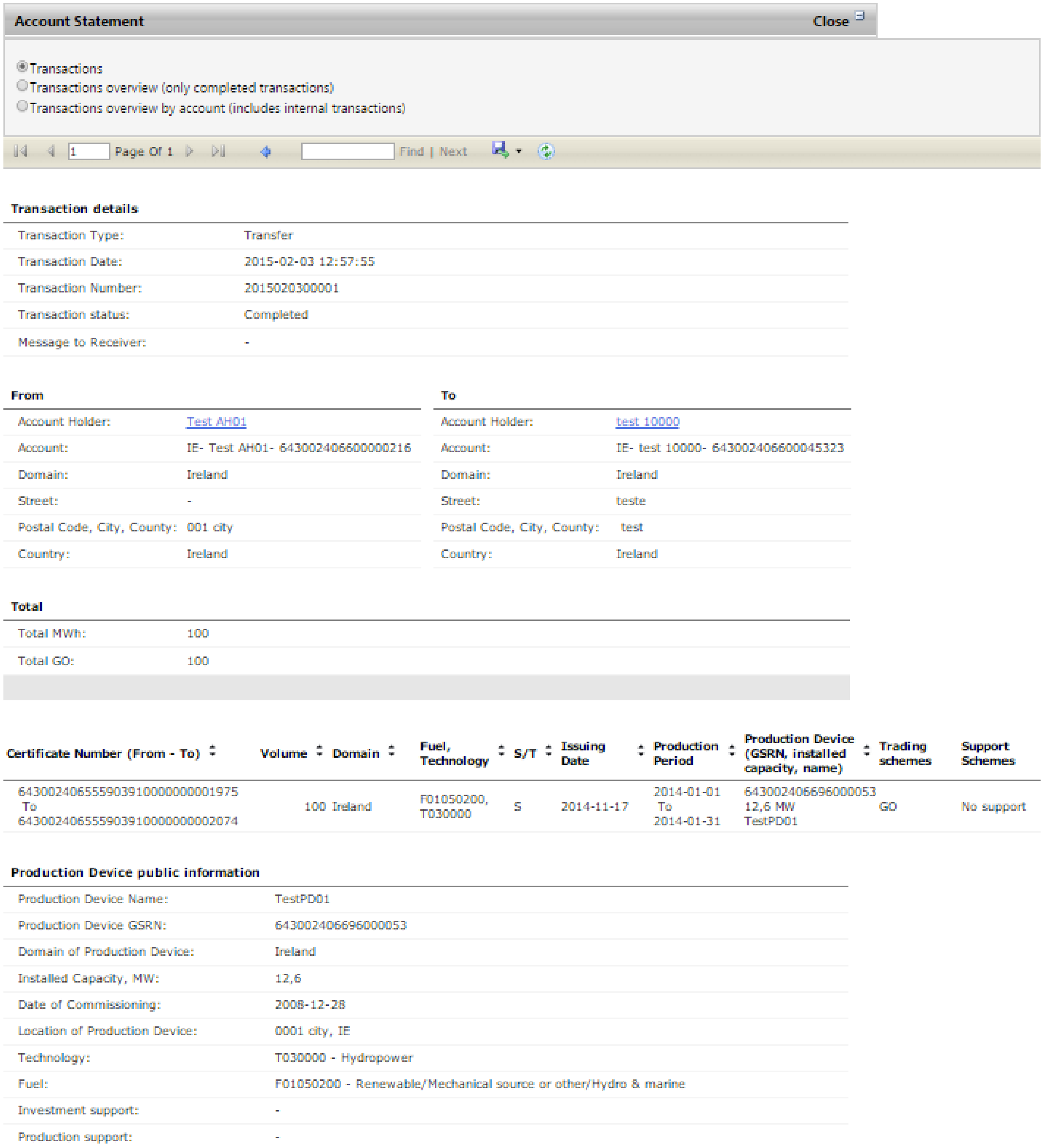


Figure 6.23 – Transaction Details

Table 6-8 – Transaction Details: Field Description

Frame	Description
Transaction Details	Gives information on type, date, id, status of the Transaction, message to receiver and, in case of a failed export, the error code **Note:** The error codes are given according to AIB Fact Sheet 18
Transaction Source (From and To)	Gives information on the Account Holder(s) involved in the Transaction.

Total	Gives the number of certificates and corresponding units of electricity involved in the Transaction. Also states the volumes by License.
Certificate Details	Gives details on Certificate Numbers, Volume, Domain, Fuel and Technology, S/T (whether it is based on source (S), technology (T), or both (S+T), Issuing Date, Production Period, Trading Schemes, and Support Schemes.
PD Details	The public available information on the PD related to the certificates transferred: Name, GSRN, Domain, Installed Capacity, Date of Commissioning, Location, Technology, Fuel and whether the PD receives Investment and/or Production support

6.8 Search Certificates

This option enables you to locate a set of certificates and execute Transfer/Cancel operations on them, or simply view their details.

1. Navigate to **EECS-GO>Search Certificates**
2. Determine the criteria (the fields are described in Table 6-9 and Figure 6.24) and click **Search**.
3. The search results can also be shown as a report by checking the **Show as Report** checkbox. After this, you can choose the appropriate **Report Type**. See Chapter 6.8.1 for more details on this view
4. Executing the Search will display a similar view as in Chapters 6.4 and 6.4.2 when transferring or Cancelling Certificates.

Table 6-9 – Search Certificates: field description

Field	Description
Certificate Info	
Production Period	The production period (Start and End Date) of the electricity associated with the certificates.
Earmark Type	The support type(s) of the certificates.
Fuel	The Fuel(s) for which the certificates have been issued.
Trading Schemes	The Trading Scheme(s) linked with the certificates.

Only Selected Scheme(s)	Exclusive search according to License, i.e., search certificates that are GO-only or ICS:RECS-only
Issuing Body	The Issuing Body/Bodies that issued the certificates.
Issuing Date	The period during which the certificates have been issued.
Certificate Number	The Start and End numbers of the certificates.
Account Holder Info	
Account Name	Name of the Account possessing the certificates.
Account Number	Number of the Account possessing the certificates.
Account	The Account(s) possessing the certificates.
Production Device Info	
PD Name	Name of the Production Device associated with the certificates.
GSRN	GSRN of the Production Device.
PDs	Production Device(s) associated with the certificates.
Technology	Technology of the PD associated with the certificates.
Commission Date	Commission Date of the Production Device(s).
Installed Capacity	Installed Capacity of the Production Device(s)
Show as report	See Chapter 6.8.1

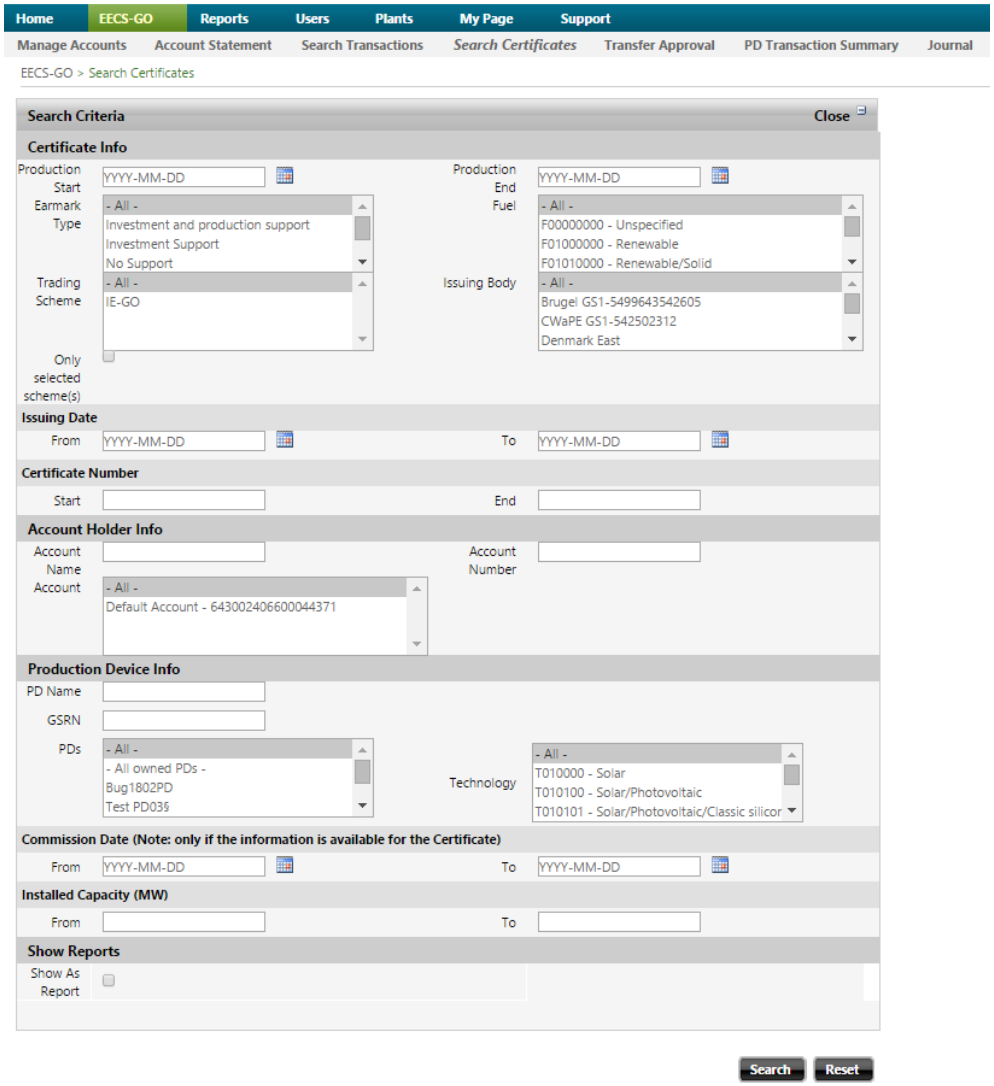


Figure 6.24 – Certificate Search Criteria

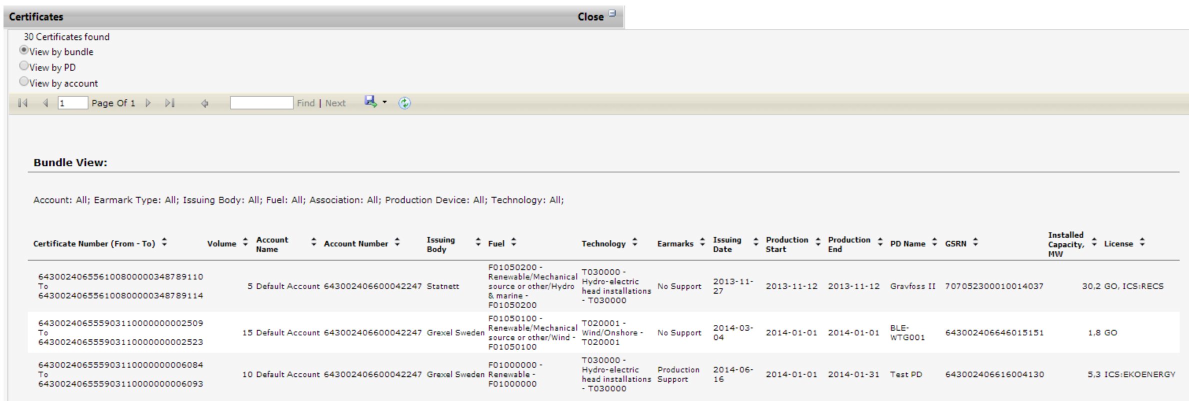
6.8.1 View Certificates

If you want to view the certificates available in your account, it is useful to select the option **Show as Report** on the bottom of the search criteria page (Figure 6.24) when searching for certificates. This option is additional to all search criteria you select and allows the user to view the results as a report and export it to Excel or PDF.

Note: With Show as Report mode enabled, it is not possible to select the certificates to execute transactions only to have a general overview of the certificates available. If you want to perform transaction, refer to Chapter 6.4

1. Navigate to **EECS-GO >Search Certificates**
2. Fill the search criteria and select **Show as Report** checkbox

3. A new field will appear. You must choose "Transferable/Active" or "Issued" certificates.
    - Transferable/Active: it returns all certificates bundles in your account that are available to be transferred
    - Issued: it returns the issued bundles, even if they are no longer available in your account.
4. Click **Search**
5. You can have the certificates presented by bundle, by PD or by account.
    - If e.g. **Select certificates by bundle** is selected, the list of Certificate Bundles held by this Account is displayed (Figure 6.25)
6. You can Export the details to an Excel sheet or a PDF file by clicking the **Export** button and choosing the suitable option.



Certificate Number (From - To)	Volume	Account Name	Account Number	Issuing Body	Fuel	Technology	Earmarks	Issuing Date	Production Start	Production End	PD Name	GSRN	Installed Capacity, MW	License
643002406556100800000348789110 To 643002406556100800000348789114	5	Default Account	643002406600042247	Statnett	F01050200 - Renewable/Mechanical source or other/Hydro & marine - F01050200	T030000 - Hydro-electric head installations - T030000	No Support	2013-11-27	2013-11-12	2013-11-12	Gravfoss II	707052300010014037	30,2	GO, ICS:RECS
643002406555903110000000002509 To 643002406555903110000000002523	15	Default Account	643002406600042247	Grexel Sweden	F01050100 - Renewable/Mechanical source or other/Wind - F01050100	T020001 - Wind/Onshore - T020001	No Support	2014-03-04	2014-01-01	2014-01-01	BLE-WTG001	643002406646015151	1,8	GO
643002406555903110000000006084 To 643002406555903110000000006093	10	Default Account	643002406600042247	Grexel Sweden	F01000000 - Renewable - F01000000	T030000 - Hydro-electric head installations - T030000	Production Support	2014-06-16	2014-01-01	2014-01-31	Test PD	643002406616004130	5,3	ICS:EKOENERGY

Figure 6.25 – Search Certificates – Show as report (view by bundle)

6.9 PD Transaction Summary

The PD Transaction Summary report enables the user to have a summary of all transactions by PD. It is possible to search by Account Holder, Production Device, etc. (Figure 6.26 and Table 6-10).

The report brings amount issued, transferred (to and from), cancelled, exported, imported, corrections made, withdrawals, certificates that expired and internal transfers made by PD (Figure 6.27).

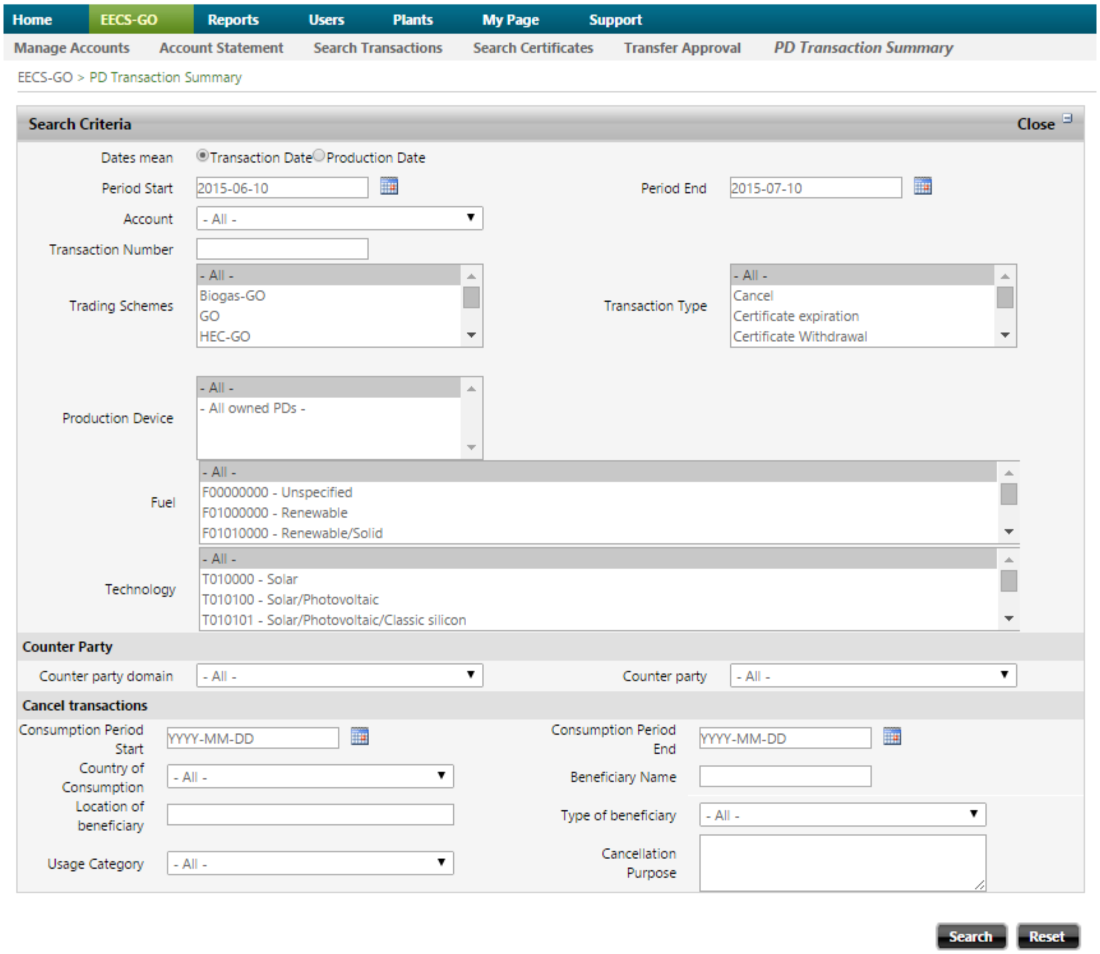
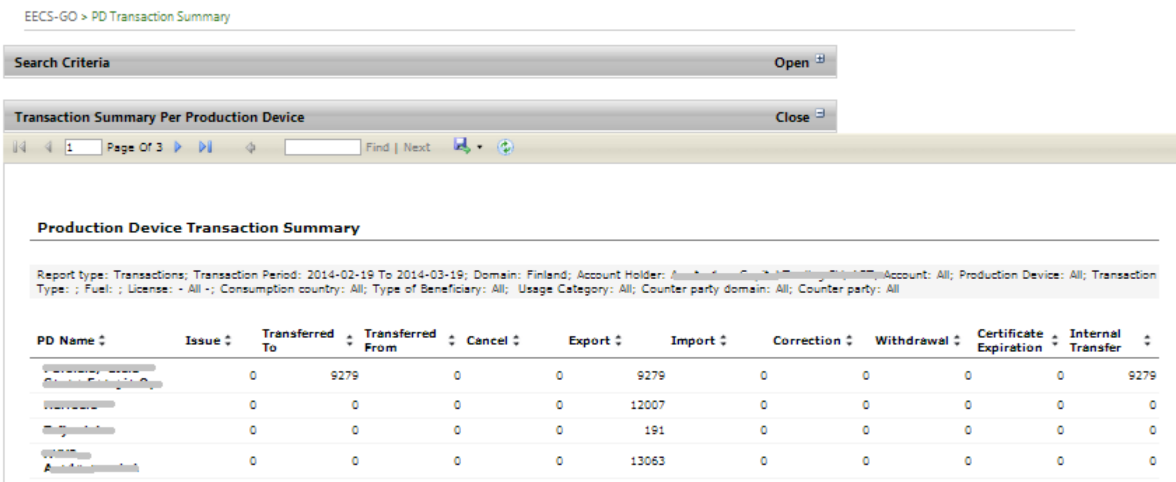


Figure 6.26 – PD Transaction Summary (Search Criteria)

Table 6-10 – Search PD Transaction Summary (Search Criteria)

Field	Description
Dates mean	Search by Transaction date or Production date
Period	The time period (Start and End Date) of the transactions
Account	The Account associated with the transactions
Transaction Number	The number of a specific transaction
Trading Scheme	The Trading Scheme linked with the transactions
Transaction Type	Search the PD transactions based on different Transaction types

Field	Description
Production Devices	The Production Device(s) associated with the transactions
Fuel	The Fuel(s) associated with the transactions
Technology	The Technology associated with the transactions
Counter Party	
Counter Party Domain	Domain of the receiver
Counter Party	External Receiver/Sender of the transaction
Cancel Transactions	
Consumption Period	The Start and End Dates of the time period of electricity consumption for which the certificates have been Cancelled
Country of Consumption	The country where the electricity has been consumed Certificates may only be Cancelled for domestic consumption or for consumption in countries where the EECS is not implemented
Beneficiary Name	The actor to which this electricity was sold to or by whom it was sold
Location of Beneficiary	More detailed information of the Beneficiary such as department unit, division, or geographical branch
Type of Beneficiary	The type of the cancellation beneficiary
Usage Category	Select the usage category of electricity origin Certificate Cancellation purpose from the dropdown list: **Support**: Cancelled to receive financial support **Disclosure**: Cancelled under a green labelling scheme or as proof of supply to consumers or for own use. Has not been used to receive financial support **Other**: other usage Category
Cancellation Purpose	Enter text to indicate the reason for Cancellation



EECS-GO > PD Transaction Summary

Search Criteria Open

Transaction Summary Per Production Device Close

1 Page Of 3 Find | Next

Production Device Transaction Summary

Report type: Transactions; Transaction Period: 2014-02-19 To 2014-03-19; Domain: Finland; Account Holder: [illegible]; Account: All; Production Device: All; Transaction Type: ; Fuel: ; License: - All -; Consumption country: All; Type of Beneficiary: All; Usage Category: All; Counter party domain: All; Counter party: All

PD Name	Issue	Transferred To	Transferred From	Cancel	Export	Import	Correction	Withdrawal	Certificate Expiration	Internal Transfer
[illegible]	0	9279	0	0	9279	0	0	0	0	9279
[illegible]	0	0	0	0	12007	0	0	0	0	0
[illegible]	0	0	0	0	191	0	0	0	0	0
[illegible]	0	0	0	0	13063	0	0	0	0	0

Figure 6.27 – PD Transaction Summary

7 PRIVATE REPORTS

7.1 Activity Log

The Activity Log keeps track of User Activities, e.g. Transactions and modifications made. Details of Activities performed can be found here, including Date, User, Category and Description (Figure 7.2). Activities can be searched by expanding the Search Criteria. Search Criteria include User, Activity Time Period and Activity Category (Figure 7.1). The Activity Log can be found at **Reports> Activity Log.**

The Activity Log also lists information of changed fields: these changes can be viewed under the **View History** column. All relevant changes of data are logged to the Activity Log with their previous and new values.

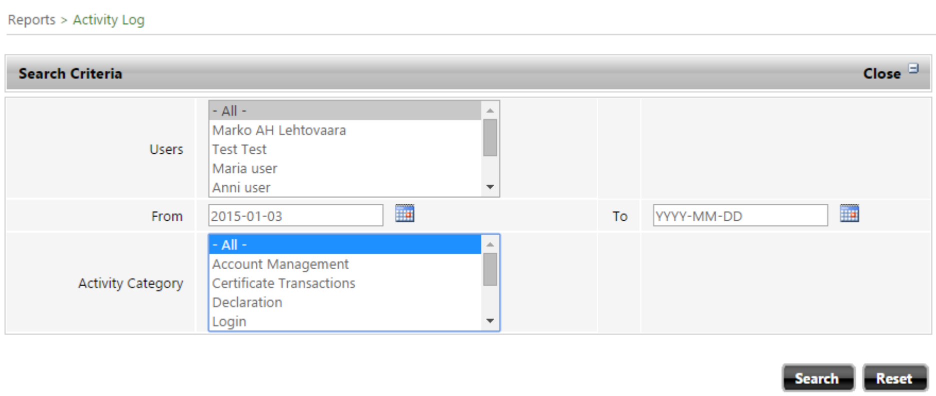


Figure 7.1 – Activity Search

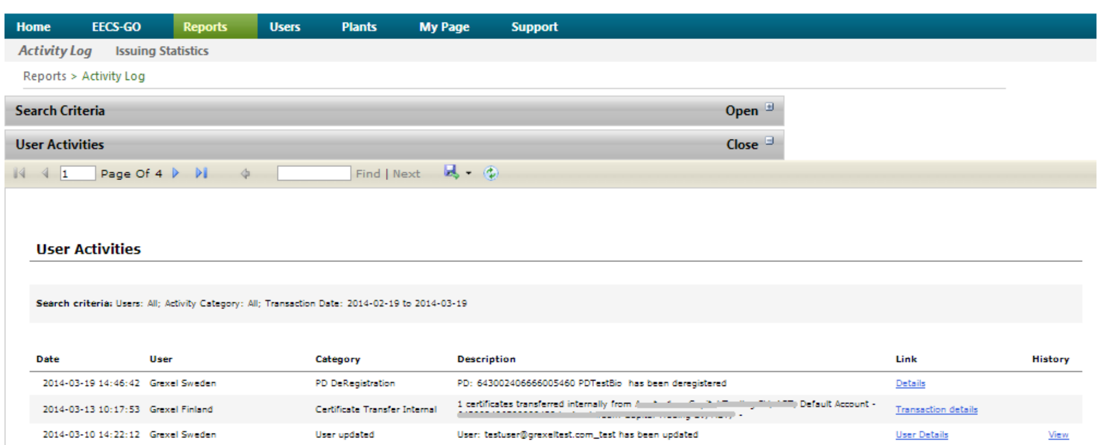


Figure 7.2 – Activity Log

7.2 Cancellation Statements*

Note: Cancellation Statements reports are domain dependent and its layout changes according to the domain.

At **Reports>Cancellation Statements**, Account Holders can view and print the cancellation statements for performed cancel transactions.

1. Navigate to **Reports>Cancellation Statements**
2. Fill the search criteria and select Search.
3. A list of cancellation statements will be displayed (Figure 7.3)
4. Click on the Transaction Date link to see the report

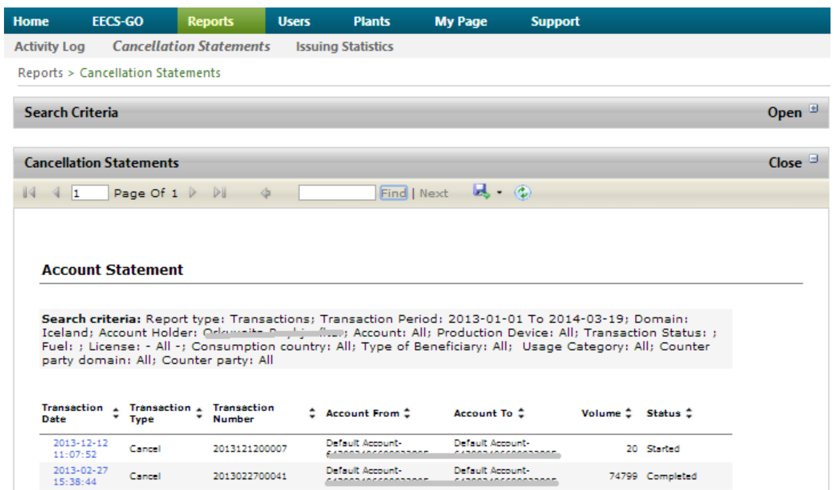


Figure 7.3 – Cancellation Statement list

The report contains multiple pages and it brings information on the cancellations, i.e., transaction date, number, AH information, beneficiary information, cancellation purpose, number of certificates cancelled, certificates information, PDs' public information and signature field. Figure 7.4 is an example

The report may be exported to PDF by clicking the **Export** button.

If your organization so desires, the Public link to cancellation statement* may be given to anyone without access to the report in CMO.grexel and that wishes to see the cancellation statement.

Note: * Publishing the Cancellation Statement is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.

Cancellation Statement

With this Cancellation Statement the indicated certificates are no longer tradable. Onward sale of this Cancellation Statement is prohibited.

Transaction details

Transaction Type:	Cancel
Transaction Date:	2016-05-04 14:49:09
Transaction Number:	2016050400018
Public link to cancellation statement:	http://cmogrexeltest.grexel.com/CancellationStatements/CancellationStatement_94813_d854d2e8-[redacted].pdf

From

Account Holder:	Organization A
Account:	RS- Organization A-643002406900000022
Domain:	Serbia
Street:	-
Postal Code and City:	011 Belgrade
Country:	Serbia

To

Name of Beneficiary:	[redacted]
Cancellation Purpose:	test
Consumption Period:	2016-05-04 to 2016-05-04
Country of Consumption:	[redacted]
Location of Beneficiary:	[redacted]
Usage Category:	Support
Type of Beneficiary:	Energy supplier

Total

Total MWh:	3
Total GO:	3

Certificate Number (From - To)	Volume	Domain	Fuel, Technology	S/T	Issuing Date	Production Period	Production Device (GSRN, installed capacity, name)	Trading Schemes	Support Schemes
643002406555903110000000000383 To 643002406555903110000000000385	3	Sweden	F01010502, T051000	S	2016-02-26	2016-01-01 To 2016-01-01	[redacted]904 5000 MW [redacted]	GO	No support

Production Device public information

Production Device Name:	[redacted]
Production Device GSRN:	[redacted]904
Domain of Production Device:	Sweden
Installed Capacity, MW:	5000
Date of Commissioning:	2016-01-01
Location of Production Device:	600099 Chennai, SE
Operator Name:	PradeepAH1
Address of Operator:	600099 Chennai, India
Technology:	T051000 - Thermal/Organic rankine cycle
Fuel:	F01010502 - Renewable/Solid/Biomass from agriculture/Agricultural by-products & waste
Investment support:	-
Production support:	-

Figure 7.4 – Cancellation Statement report

7.3 Issuing Statistics

The Issuing Statistics report (found at **Reports>Issuing Statistics**) enables the Account Holder to view and search issuing transactions.

1. Navigate to **Reports>Issuing Statistics**
2. Fill the search criteria according to Figure 7.5 and Table 7-1.
3. A list of PDs and the corresponding issued Volume will be displayed according to the interval selected in the search criteria. Click the GSRN link to see the PD's information (Figure 7.6).

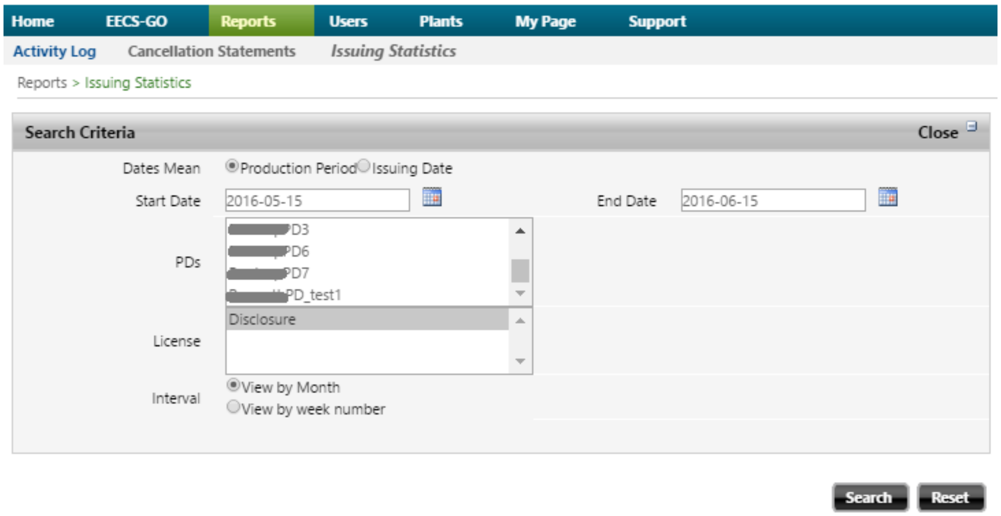


Figure 7.5 – Issuing Statistics

Table 7-1 – Issuing Statistics: field description

Field	Description
Dates Mean	Determines whether the Start and End Dates indicate the Production Period or the Issuing Date of the transactions.
Start Date	Start Date of the defined period (either Production Period or Issuing Date).
End Date	End Date of the defined period (either Production Period or Issuing Date).
PDs	Production Devices involved
License	Only Disclosure License is available in CMO.grexel
Interval	Select to view issuing volumes per month or per week

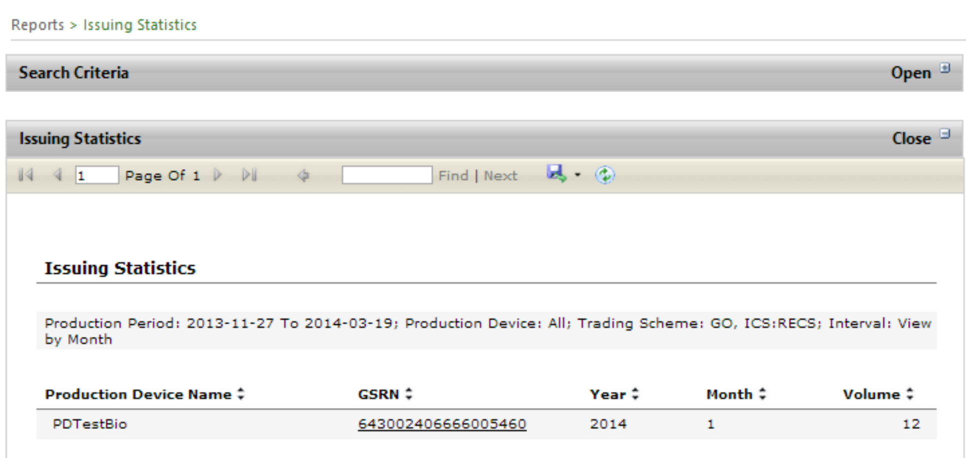


Figure 7.6 – Issuing Statistics

8 SUPPORT

Under Support menu, users can find the User manual for CMO.grexel application, as well as Frequently Asked Questions and a link to Grexel Knowledgebase page where there are find articles about energy certification and CMO.grexel.

If users have questions that cannot be solved with the help of the User manual or F.A.Q., both available under **Support > User Manuals**, they should contact their Issuing Body (contact information given in the Public Site > Info menu).

The users from Sweden domain should initiate a support case in Grexel's Support portal (https://grexel.kayako.com) and select CMO.grexel department there.

8.1 Contact Us*

Note: *This functionality is a domain specific functionality and may not be available in your domain. Please contact your Issuing Body to know more.

Under **Support >Contact Us**, Account Holder users can submit a query to their Issuing Body.

Give your Name, Phone Number, Contact Email, post you question in the Query detail field and click **Submit** (Figure 8.1).

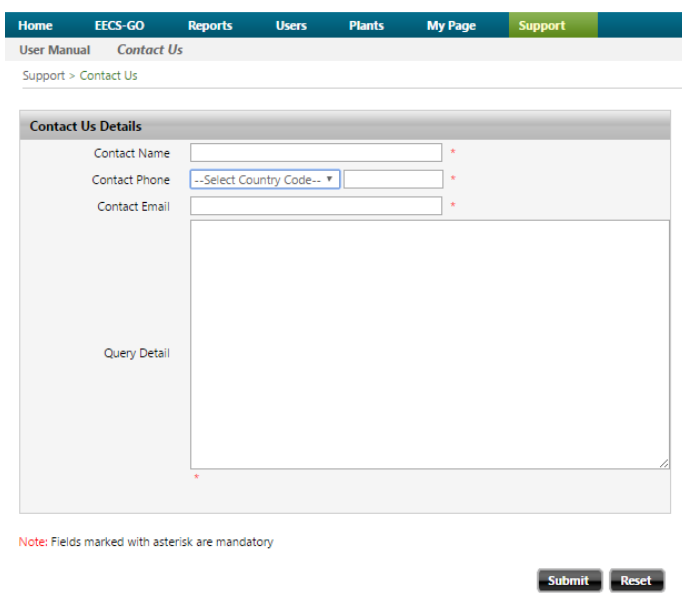


Figure 8.1 – Contact Us form

9 PUBLIC REPORTS

The Public reports are available at the public site of the CMO.grexel. In order to access the public site reports you need to navigate to the public site and **Reports**. This is shown in Figure 9.1.

There are five different reports under the reports module: Members, Plants, Transactions, Export and Import.

- **Members:** This report gives the details of Account Holders that exist in the CMO.grexel application. Details include Name, Domain, Member Code, Default Account Number and Website.
- **Plants:** This report gives the details of Production Devices (PD) that exist in the NOCS application. You can search Production Devices and view public information related to them: public details include the Plant's name, Domain, GSRN number, Installed Capacity, Date of Commissioning, Address, Operator, Energy Source, Public Support schemes and PD Earmarks.
- **Transactions:** This report contains the volumes of Certificate Transactions from different Energy Sources. The Transactions can be filtered according to Domain, Association and Transaction/Production period. The report provides a breakdown of Transactions based on the types of electricity Certificate Transactions that include Export External, Issue, Cancel, Import External, Export and Transfer.
- **Imports:** This report displays the volume of Imports to the selected Domain from the other Domains.
- **Exports:** This report displays the volume of Exports from the selected Domain to the other Domains.

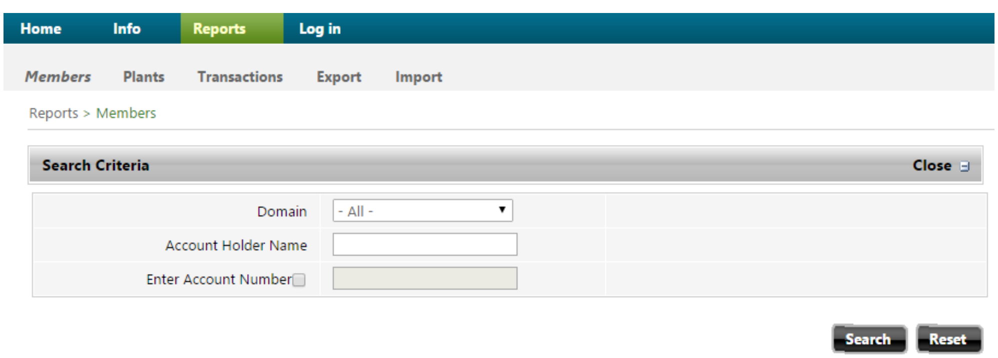


Figure 9.1 – Navigation to Public Reports

9.1 Members Report

This report contains information about the members of CMO.grexel in different domains.

1. On the public site navigate to **Reports >Members**
2. The members can be searched by Domain or by Account Holder or Account Holder Number as seen on the Figure 9.1. You can define single or multiple criteria. Table 9-1 explains the criteria.
3. Click **Search**
4. Details of all Organizations matching the criteria are displayed. Table 9-2 describes the results.
5. You can Export the details to an Excel sheet or a PDF file by clicking the **Export** button and choosing the suitable option.

Table 9-1 – Account Holder Search conditions

Name	Description
Domain	Select the Domain from the drop down list, to filter and display the Account Holders belonging to the selected Domain. By default "All" the Domains are selected and the report then displays the details of all the Account Holders under CMO.grexel application.
Account Holder Name	Enter the Account Holder name or a string (wild string) to filter and display the Account Holders list whose name contains the string you have entered.
You can choose to search either on the basis of the Account Holder name or Account Holder number. When you select either one of the options, the other option is disabled.	
Enter Account Number (Enable / Disable)	Instead of entering the Account Holder name, you can enter the Account Number of the Account Holder, to search the list. Click this box to enter the Account Number.
Enter Account Number	Enter the Account Number of the Account Holder.
Validate Account Number (link)	Click this link to validate the Account Number entered.
Action Links	
Search	Click this to invoke the search and display the filtered Account Holders list.
Reset	Click this to reset the screen to enter new search conditions.

Table 9-2 – Details of the Account Holders

Details of the Account Holders	
Account Holder Name	Name of the Account Holder Organization. Click the link to go to the Account Holder's Website (if provided)
Domain	The Domain to which the Organization belongs
Member Code	The Member Code assigned to the Organization
Default Account Number	The default Account number generated for this Organization

9.2 Plants Report

This report gives details of the Production Devices that exist in the CMO.grexel. Details include the Plant name, Domain, its GSRN number, Fuel and Technology

1. On the Public Site navigate to **Reports>Plants**. Fill in the search criteria (Figure 9.2). You can search based on PD Name, GSRN, Fuel and Technology and commission date (Table 9-3). You can define one or multiple criteria.
2. A list of all Production Devices matching the Search Criteria is displayed. The list contains the Production Device names, GSRN, Installed Capacity, Commissioning Date, Technology, Public PD upgrade info and Registrant (Figure 9.3 and Table 9-4).
3. You can Export the details to an Excel sheet or a PDF file, by selecting the respective option and clicking the **Export** button.

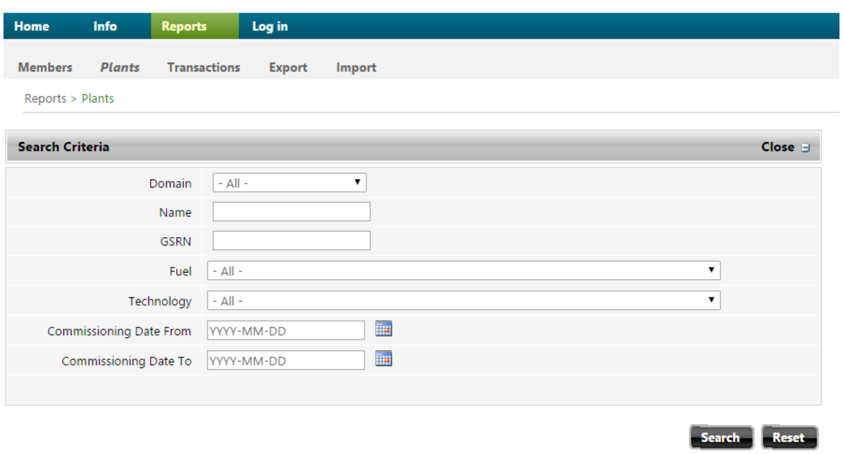


Figure 9.2 - Production Devices Search Criteria

Table 9-3 – Production Devices Search Criteria

Name	Description
Domain	Select the Domain of your choice
Production Device Name	Enter the Production Device name or a string (wild string) to filter and display the Production Devices list whose name contains the string you have entered.
GSRN	Enter the (complete) GSRN of the PD to search for a specific Production Device by its Global Service Relation Number.
Fuels	Select the Fuels from the drop down list, to filter and display the Production Devices belonging to the selected Fuel. By default, all the Fuels are selected and searching with default criteria will display the details of all the Production Devices under CMO.grexel
Technology	Select the Technology from the drop down list, to filter and display the Production Devices belonging to the selected Technology. By default, all the Technologies are selected and searching with default criteria will display the details of all the Production Devices under CMO.grexel.
Commissioning Date From	Earliest date the Production Device has become operational.
Commissioning Date To	Latest date the Production Device has become operational.
Action Links	
Search	Click this to invoke the search and display the filtered Production Devices list.
Reset	Click this to reset the screen to enter new search conditions.

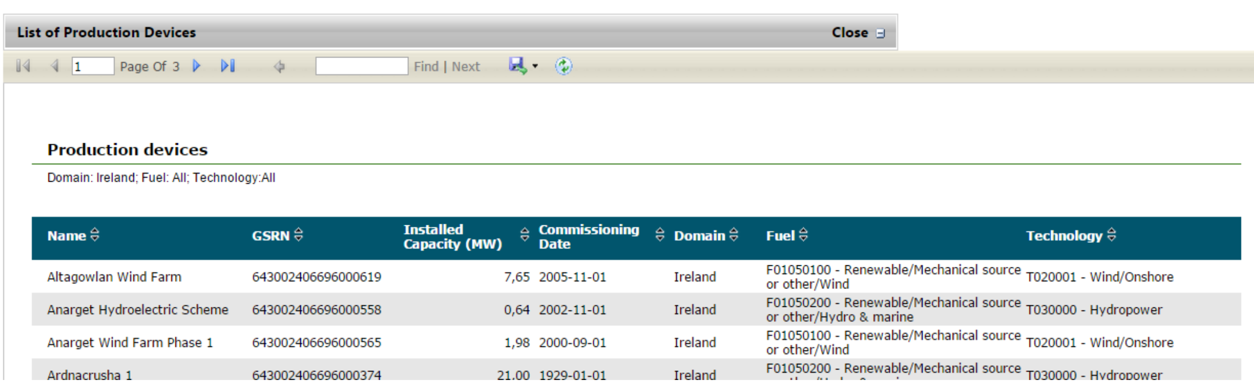


Figure 9.3 – Production Device Public Information

Table 9-4 – Details of all the Production Devices

Details of the Production Devices	
Name	Name of the Production Device.
GSRN	The GSRN (Global Service Relation Number) assigned to the Organization.
Installed Capacity (MW)	The installed capacity of the PD.
Commissioning Date	Date of Commissioning of the PD
Domain	The Domain to which the Organization belongs.
Fuel	All the Fuels the Production Device is able to convert to electricity.
Technology	The Technology of the Production Device

9.3 Transactions

This report gives the details of the Transfers from different fuels for specified periods of transaction or production. This gives a break-up of Transactions based on different fuels of Transfers that include Issue, Transfer, Cancel, Export, Import, Certificate expiration. This is useful for analysing the electricity production from the different Fuels and to define a trend of electricity Transfers.

1. On the Public Site navigate to **Reports>Transactions**.
2. Fill in the search criteria (Figure 9.3). You can search based on Transaction Date, Production Date (Table 9-5).
3. A bar graph and a table of the quantity of all Transactions matching your criteria is displayed (Figure 9.4).
   a) Bar Graph: The total of Cancelled certificates, Certificate expiration, Exports, Import, Issue and Transfer based on the Search Criteria are listed in the X-axis and volume of certificates in millions is represented in the Y-axis
   b) Table: The same details sorted by fuel are represented in numbers in a tabular form, below the bar graph
4. You can Export the details to an Excel sheet or a PDF file, by selecting the respective option and clicking the **Export** button.

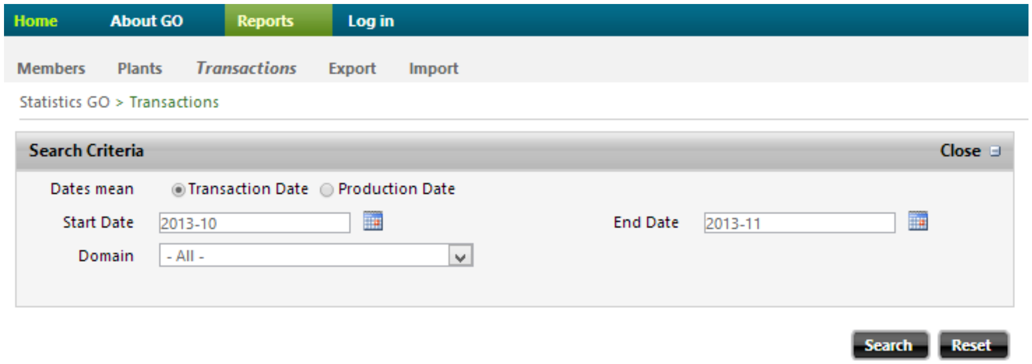


Figure 9.4 -Transactions search criteria

Table 9-5 – Transaction Report search criteria

Name	Description
Dates Mean	Select Transaction Date or Production Date to base you report
Start Date and End Date	Select the period of the report
Domain	Select the domain of your interest (not mandatory)
Action Links	
Search	Click this to invoke the search and display the details of the filtered Transactions.
Reset	Click this to reset the screen to enter new search conditions.

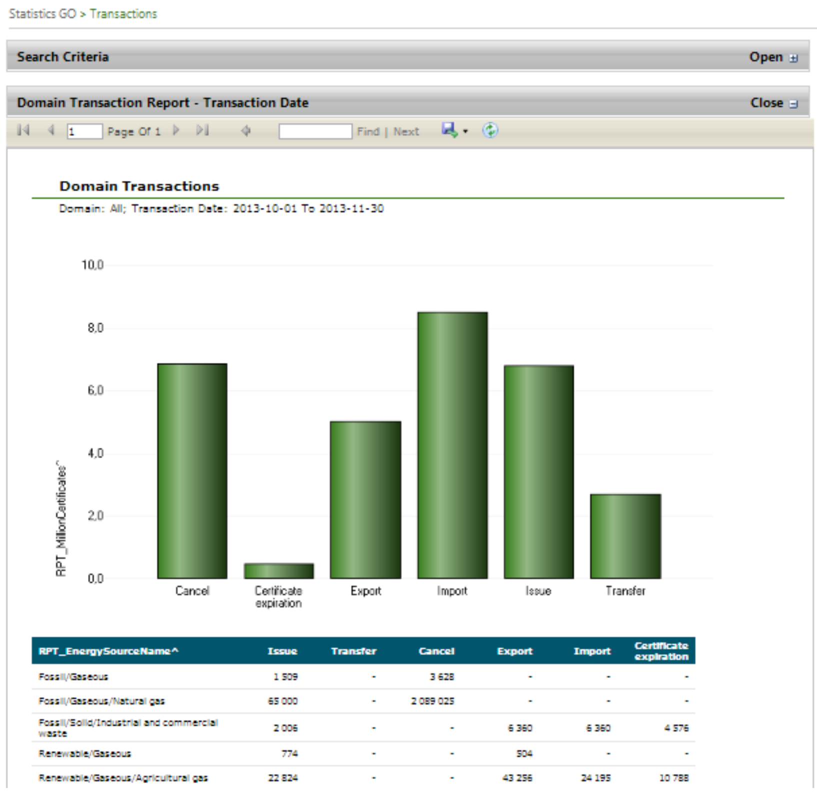


Figure 9.5 -Transaction Report

9.4 Export

This report as the name indicates, displays the volume of Exports from the selected Domain to the other Domains. This includes Exports across the Domains within your system and also beyond your system. You can choose to generate the Export details from a specific Domain or consolidated Export details from all the Domains, for a specified period and possibly for specific Associations (trading schemes).

1. On the Public Site navigate to **Reports>Export**.
2. Choose a Domain, a Start Date and an End Date in the Search Criteria (Figure 9.5).
3. The volume of all exports in this Registry to each Domain is represented in a bar graph (Figure 9.6).

Note: To Domain refers to the Importing Domain and not the Exporting Domain

4. You can Export the details to an Excel sheet or a PDF file, by selecting the respective option and clicking the **Export** button.

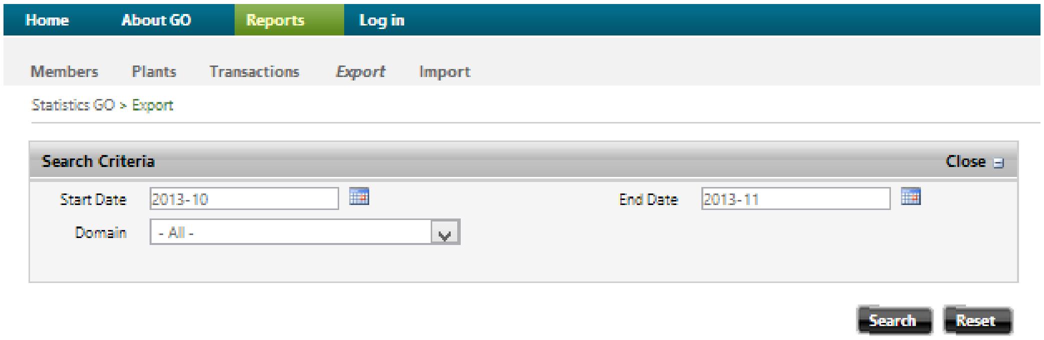
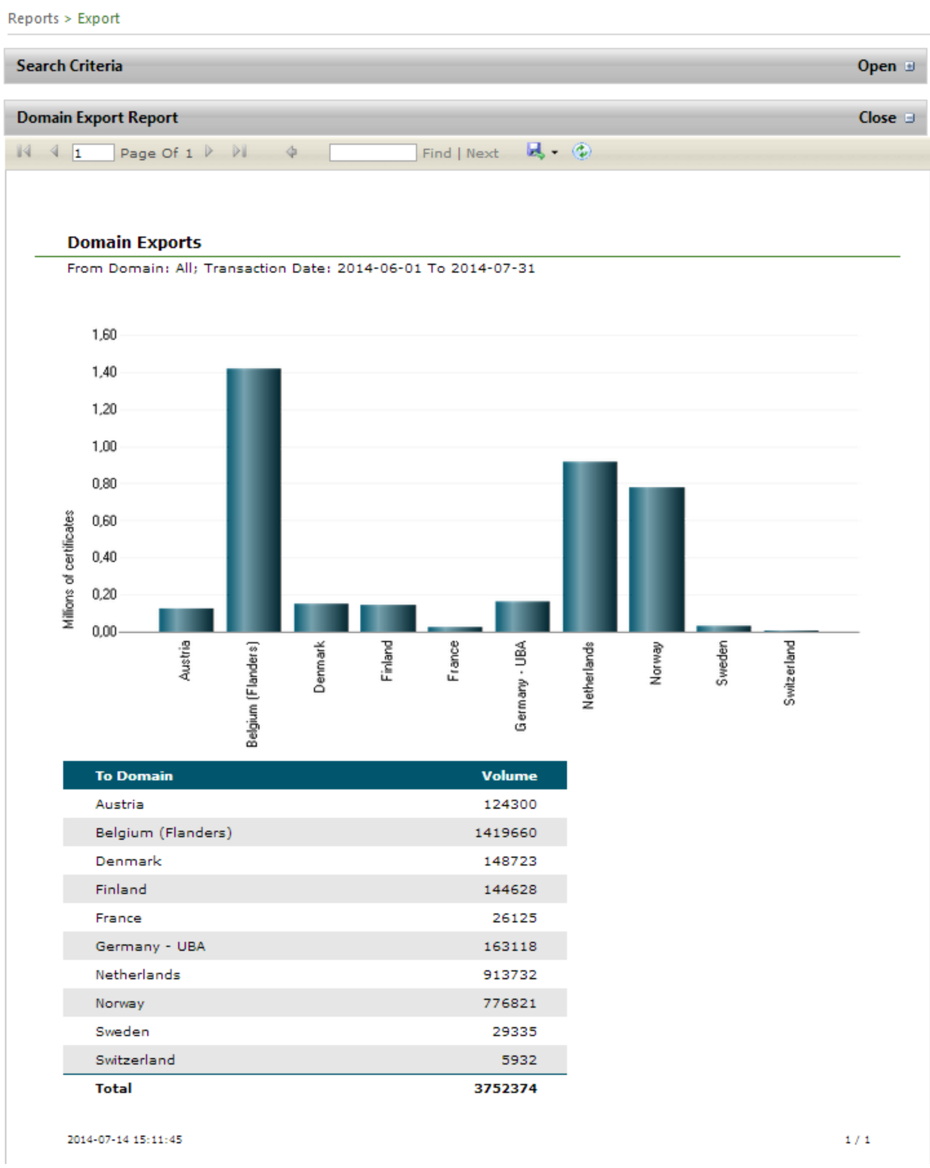


Figure 9.6 - Export search criteria



Domain Exports

From Domain: All; Transaction Date: 2014-06-01 To 2014-07-31

To Domain	Volume
Austria	124300
Belgium (Flanders)	1419660
Denmark	148723
Finland	144628
France	26125
Germany - UBA	163118
Netherlands	913732
Norway	776821
Sweden	29335
Switzerland	5932
Total	**3752374**

2014-07-14 15:11:45 1 / 1

Figure 9.7 -Export search results

9.5 Import

This report as the name indicates, displays the volume of Imports to the selected Domain from the other Domains. You can choose to generate the report for Import details to a specific Domain or consolidated Import details from all the Domains, for a specified period and possibly for specific Associations (trading schemes).

1. On the Public Site navigate to **Reports>Import**.
2. Fill in the search criteria as in the export report
3. The volume of all exports in this Registry to each Domain is represented a bar graph similar to the export report.

Note: From Domain refers to Exporting Domain and not the Importing Domain

4. You can Export the details to an Excel sheet or a PDF file, by selecting the respective option and clicking the **Export** button.

