

CMO.grexel

Account Holder User Manual

Version 10 (4.0.3)

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8	PH 7.1 7.2 7.3 SU 8.1	RIVATE I ACTIVI CANCE ISSUING UPPORT CONTA	REPORTS TY LOG LLATION STATEMENTS* G STATISTICS	
8	PH 7.1 7.2 7.3 ST 8.1 PT	RIVATE I Activi Cance Issuind UPPORT Conta UBLIC RI Membi	REPORTS	
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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 <u>Chapter 5.2</u>) 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.

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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:

Chapter	Description
<u>Chapter 1 – CMO.grexel – An</u> <u>Overview</u>	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.
<u>Chapter 4 – Managing the</u> <u>Organization</u>	This chapter describes the option provided under the My Page module to maintain the details of your Organization.
<u>Chapter 5 – Running & Maintaining</u> <u>Plants</u>	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).
<u>Chapter 7 – Generating Private</u> <u>Reports</u>	This chapter describes the system of private reporting provided under the Reports module.
<u>Chapter 8 – Support menu</u>	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.
<u>Hyperlink</u>	Link to specific locations inside the document.	Click the <u>PD Registration Form</u> 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 <u>Chapter 3.6</u> 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 <u>https://grexel.kayako.com/Knowledgebase/Arti-</u> cle/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.
- The CMO.grexel public site is displayed (<u>Figure 2.1</u>). Click Login to navigate to the private site and use the client certificate to log in. If you face problems in authentication, see <u>Chapter 3.6</u> or visit <u>https://grexel.kayako.com</u>
- 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.

CMO.grexel		Select Language:	English V
ome About GO Reports	Log in		
the			
Announcement			
	ate authentication. If you do not receive an email and text message to i rital at: http://grexel.helpserve.com/ or by sending an email	ogin,	
CMO.grexel is a central registration database	e for European Energy Certificate System (EECS)⊜ certificates.	_	
The types of certificates currently supported in o Guarantees of origin as meant by directives 2 o Independent Criteria Scheme (ICS) certificat	2009/28/EC, 2001/77/EC and 2004/8/EC (cogeneration)		
CMO.grexel is the national registry for the follo	wing domains and EECS Issuing Bodies:		
o Denmark – Energinet.dk o Finland – Grexel Systems Itd.			
o Germany - Öko-Institut e.V. o Iceland - Landsnet			
o Luxembourg – Institut Luxembourgeois de Re o Sweden – Grexel Systems Itd.	égulation		
IMO.grexel is open to anybody who wishes to ationality or registration state.	open an EECS account in the respective domains, regardless of the		
	by national VAT and anti-money laundering regulations and co-operat	te	
All Issuing Bodies using CMO.grexel are bound with authorities at domestic and international			

Figure 2.1 – CMO.grexel login screen

CMO.g	rexel							9	elect Language: Engli	ish
	I UAUI						Logged in t	o Test AH01 :lutiuiu		Sign
me EECS-G	GO Reports	Users	Plants	My Page	Support					
Welcome to CM	10.grexel lutitian	- 10						Go Home		
Account Holder	Test AH01			Login	10	_	_	domonie		
Email	Kenerarda nd zigi zin.							Search		
Mobile Number	+353 0000000			Test Al	102			Login		
Client certificate expiration	2015-12-03							Login		
ending Tasks	Title								Charles	
Created▼	Title								Status	
014-12-05 14:40:1	5 A transfer of 1	0 certificates to	o account Test	AH02 on 2014-12	-05 13:40:14 is pe	nding for your appr	val		Not Started	
2014-12-03 16:05:40	0 A transfer of 2	0 certificates to	o account Test.	AH02 on 2014-12	-03 15:05:38 is pe	nding for your appr	val		Not Started	
					age 1 Of 1 膨	🗎 Go to page	Go	Show Per Page	10 Go	
lerts										
Title						Modified			URL	
PD Test PD03§ has b	een activated.					2014-12-05 11:21:15			view	
PD TestPD01 has bee	en activated.					2014-12-05 10:49:14			view	
eland_Announcem	nent									
Actions -										
) Title					Modified					
IB Announcement	E DINEW				2014-1	1-05				
	s									
Announcement										
Announcement										



2.1.2 CMO.grexel Main Menu

The main menu displays the list of modules that are accessible to the user. <u>Table 2-1</u> 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 <u>Chapter 3</u> for information about the access permissions defined for different roles.

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.

Table 2-1 – Modules in the Main Menu

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 <u>https://grexel.kayako.com</u> . 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.

Production Devices	Close 🗆
🛙 🖣 1 Page Of 1 👂 🕅 🧄 🔶 Find Next 🔍 🕶 🚱	

Figure 2.3 – Report viewer

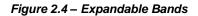
lcon	Description					
14	First Page: Navigate to the first page of the report.					
4	Previous Page: Navigate to the previous page.					
Þ	Next Page : Navigate to the next page.					
ÞI	Last Page: Navigate to the last page of the report.					
4	Go back to the parent report: Navigate to the parent report.					
Find Next	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.					
٢	Refresh: Refresh the current page.					

Table 2-2 – Report viewer functions

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. <u>Figure 2.4</u> displays a band example. Click **Open** to expand a band or **Close** to hide it.

Search Criteria		Open 🖲
Production Devices	Close B	



2.1.5 Useful keyboard shortcuts

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

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.

Table 2-3 - Keyboard shortcuts

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 <u>Chapter 2.3</u> 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 <u>Figure 3.1</u> 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 <u>Chapter 6.4.4</u> 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 <u>Table 2-4</u> for a description of each list.
- 3. Click Save
- An email alert will be sent to the user email address when such activity happens in the system (See <u>Figure 2.6</u> for an email notification example).

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

lome	EECS-GO	Reports	Users	Plants My Pa	age Support	
Search user	Create User	External Use	ers Subscri	be Alerts		
Alert Sub	scription					
Subscript	tion List					Subscribed
Domain Ar	nouncements					۲
GO						
Registry Ar	nnouncements					 Image: A set of the set of the
Production	Device					
Transford Da	ending					



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 <u>Chapter 6.4.4</u> 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. <u>Figure 3.1</u> 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 <u>Figure 3.1</u>. 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.

						_/		
		ACCOUNT NY		/ <u>s</u>	/ ,	/ ,		/ _
			/3	ALE NOT	/_6	/		SEE NO
			Sale of the second s	and a	Stor .	/		
		1	5/3	× / 2	Se as	\$ / 3	¢ / -	13
	/	S)	S)	1º	8°	5	\$* /	sr)
	/3	<u> </u>	\$/3	AC AST	IN ERE	S NOT	ROCK	×/
Home	x	×	×	x	×	×		
Alerts List *	x	x	x	x	x	x	<u> </u>	
Domain Announcements*	x	x	x	x	x	x	x	
EECS-GO	x	x	^	^	^	x	^	
Manage Accounts (EECS-GO)		x				x		
Perform changes in the account	x	^						
	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)*	х	x				x		
Commit Transactions (EECS-GO)	x					x		
Transfer Approval (EECS-GO)*	х					x		
PD Transactions Summary (EECS-	х	X				X		
REPORTS	x	x	x	X	x	X	X	
Activity Log	х	x	x	X	x	x	×	
Cancellation Statements*	х	x	x	X	x	x	x	
Issuing Statistics	х	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*	х	x	x	x	x	x	x	
PLANTS			x	X	x	X		
View PD details			x	X	х	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	х	x	x	x	x	x	x	
Contact Us*	х	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,

- 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.

Home	EECS-GO	Reports	Users	Plants	My Page	Support					
Search us	er Create User	External U	sers Subs	cribe Alerts							
Users > S	earch user										
Search Cri	teria						(Open 🗉			
Users List							(Close 🗉			
14 4 1	Page Of 1 🕴			Find Next	- 💐 • 📀						
Users											
Domain	: Ireland; Status: U	Inlocked; Orgar	iization: Organ	ization A; Role/	Group: All						
First N	ame \$	Last Name	¢	Email \$			Mobile Phone	Roles ‡	Locked \$	Expiration date	
and an		1141 c		jle@	grexel.com		+353 000000	AH Root	No	2016-11-20	Edit
Pulur		2		@grex	kel.com		+353 000000	AH Account Viewer	No	2016-11-20	Edit

Figure 3.2 – Viewing 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 <u>Retting User Credentials</u> .
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.

Search Criter	ia			Close
First Name			Last Name	
Status	Unlocked	•		
Role/Group	- All - AH Account Administrator AH Account Viewer AH PD Administrator	▲ ■		

Figure 3.3 – 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.

Search Reset

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 <u>Figure 3.1</u> 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 (<u>Table 3-3</u>).
- 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.

lome E	ECS-GO I	Reports	Users	Plants	My Page	Support
earch user	Create User	External	Users	Subscribe Alert	5	
Users > Create	User					
Add User						
Add User	_					
First Name				*	Last Name	*
Salutation						
Organization	Organization	A IE000001	1	•	Roles	AH Account Administrator AH Account Viewer AH PD Administrator AH PD Editor AH PD Viewer AH Root AH User Administrator
Email				*	Mobile Phone	Select Country Code- 🔻
					Please e	nter valid mobile number, it is used for receiving SMS.
					Office Phone	
Address						
Company	Organization	A			Street	street
PO Box					City, County	city
					Country	Ireland

Figure 3.4 – Creating a New User

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.

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

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.
- 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.
- By clicking Reset Certificate, a new access certificate and password will be sent to the user. See <u>Resetting User Credentials</u>
- **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.

Search Criteri	a				Open 🗄
Users List					Open ±
Edit User - Pe	ter Pan				
First Name	P.:	*	Last Name		*
Salutation					
Organization	Organization A IE0000011	Y *	Roles	AH Account Administrator AH Account Viewer AH PD Administrator AH PD Editor AH PD Viewer AH Root AH User Administrator	* *
Locked					
Email		*	Expiration date	2016-11-20	
Mobile Phone	Ireland (+353) O00000	*	Office Phone		
Please enter Address	valid mobile number, it is used for receiv	ing SMS.			
Company	Organization A		Street	street	
PO Box			City, County	city	
Zip code			Country	Ireland	
Note: Fields ma	irked with an asterisk are mandatory				

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.

- 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

- 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.

arch user Create User External Users Journal Subscribe Alerts ers > External Users Create External Users Crea
Create External Users Organization Test AH01 Roles AH Account Administrator AH PD Administrator AH PD Exitor AH PD Exitor
Organization Test AH01 Roles AH Account Viewer AH PD Administrator AH PD Editor AH PD Editor
Roles AH Account Administrator AH Account Viewer AH PD Administrator AH PD Editor
Organization Test AH01 Roles AH Account Administrator AH 4D count Viewer AH PD Editor AH PD Editor
Roles AH Account Administrator AH Account Viewer AH PD Administrator AH PD Administrator AH PD Editor
AH Account Viewer AH PD Administrator AH PD Editor
AH Root AH User Administrator

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.
- 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.

ernal Users					Close
4 1 Page O	of 1 ▷ ▷	Find Next	R • ③		
External Users	List				
		Email 🗘	Roles \$	Edit	Remove ‡
Original AH 🗘	External AH 🗘	Email +	Roles +		
Original AH \$	External AH C		est.com_test AH PD Administrator	Edit	<u>Remove</u>
				Edit	<u>Remove</u>
				Edit	<u>Remove</u> 1/1

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.

Welcome to CMO_grexel fubilitation@verid@greamAlwarer Login To Go Home Account Holder Test AH01 Search Email Number +353 0000000 Client certificate 2015-12-03 Earth Pending Tasks Test AH02 Earth Create® Title Status 2014-12-05 1440:15 A transfer of 10 certificates to account Test AH02 on 2014-12-05 1340:14 is pending for your approval Not Started 2014-12-05 1440:15 A transfer of 20 certificates to account Test AH02 on 2014-12-03 1540:5538 is pending for your approval Not Started 2014-12-05 1440:15 A transfer of 20 certificates to account Test AH02 on 2014-12-03 1540:558 is pending for your approval Not Started Page 1 01 Image 1 Of 1 Image 1 Of 1 Image 1 Of 1 Image 1 Of 1 Page 1 05 Image 1 Of 1 Page 1 07 Image 1 Of 1 Image 1	ome EECS-0	GO Reports	Users	Plants	My Page	Support					
Account Holder Test AH01 Image: Count Holder Search Email Neuvienriggin.it Image: Count Holder Image: Count Holder Image: Count Holder Mobile Number +353 0000000 Image: Count Holder Image: Count Holder Image: Count Holder Client certificate 2015-12-03 Image: Count Holder Image: Count Holder Image: Count Holder Pending Tasks Created Title Status Not Started 2014-12-05 1440:15 A transfer of 10 certificates to account Test AH02 on 2014-12-03 15:05:38 is pending for your approval Not Started 2014-12-05 1440:15 A transfer of 20 certificates to account Test AH02 on 2014-12-03 15:05:38 is pending for your approval Not Started Image: Count Holder Image: Count Holder Image: Count Holder Image: Count Holder Table Modified Image: Count Holder Image: Count Holder Image: Count Holder Image: Count Holder Po Test PD05 has been activated. 2014-12-05 11:21:15 View View readed Announcement Account Holder Image: Count Holder Image: Count Holder Image: Count Holder Is Announcement Image: Count Holder 2014-12-05 Image: Count Holder	Welcome to CN	10.grexel laticiand			Login	То			Go Home		
Bill Mumile Number	Account Holder	Test AH01			Login	10	_	-			
Client certificat expiration 2015-12-03 2015-12-03 2015-12-03 2015-12-03 2015-12-03 2015-12-03 2014-12-05 201	Email	kunnanna an air							Search		
Cleant certificate expiration 2015-12-03 Pending Tasks Itile Created T Title 2014-12-05 1440:15 A transfer of 10 certificates to account Test AH02 on 2014-12-05 1340:14 is pending for your approval Not Started 2014-12-05 1440:15 A transfer of 20 certificates to account Test AH02 on 2014-12-05 1340:14 is pending for your approval Not Started 2014-12-03 16:05:40 A transfer of 20 certificates to account Test AH02 on 2014-12-05 13:05:38 is pending for your approval Not Started Wets Imit Page 1 Of 1 P0 Test PD035 has been activated. 2014-12-05 11:21:15 view view 2014-12-05 10:49:14 view etand_Announcement Modified URL IB Announcement Bitw 2014-12-05	Mobile Number	+353 0000000			Test AH	102			Login		
Created Title Status 2014-12-05 1440115 A transfer of 10 certificates to account Test AH02 on 2014-12-05 134014 is pending for your approval Not Started 2014-12-05 1440115 A transfer of 20 certificates to account Test AH02 on 2014-12-03 15:05:38 is pending for your approval Not Started 2014-12-05 16:05:40 A transfer of 20 certificates to account Test AH02 on 2014-12-03 15:05:38 is pending for your approval Not Started Image: Page 1 Of 1 Nerts		2015-12-03						-	Login		
Not Started Not Started Image: Not Started Image: Not Started <t< th=""><th>Created▼</th><th>Title</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>Status</th><th></th></t<>	Created▼	Title								Status	
2014-12-03 16:05:40 A transfer of 20 certificates to account Test AH02 on 2014-12-03 15:05:38 is pending for your approval Not Started Im Im Page 1 Of 1 Im Im Go to page Im Im Im Im Im Go to page Im		Title								Status	
Image: Page 1 Of 1 Image: Got is page Image: Got is											
Aleris Modified URL PD Test PD035 has been activated. 201412-05 11/21/15 view PD TestPD01 has been activated. 201412-05 10/49/14 view reland_Announcement 201412-05 10/49/14 view Actions - IB Announcement B MW 201412-05											
Title Modified URL PD Test PD035 has been activated. 201412-05 11/21/15 view PD TestPD01 has been activated. 201412-05 10/49/14 view reland_Announcement Actions - Title Modified IB Announcement B MM 201412-05					AH02 on 2014-12	-03 15:05:38 is pending for	your approval	60.1	Chaw Day Daga	Not Sta	rted
PD Test PD033 has been activated. 2014-12-05 11:21:15 view PD TestPD01 has been activated. 2014-12-05 10:49:14 view eland_Announcement Actions - Tele Modified IB Announcement B MV 2014-12-05	2014-12-03 16:05:4				AH02 on 2014-12	-03 15:05:38 is pending for	your approval	Go	Show Per Page	Not Sta	rted
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eland_Announcement Actions - Tille Modified IB Announcement BIMM 2014-12-05	2014-12-03 16:05:4 Alerts Title	0 A transfer of 20			AH02 on 2014-12	-03 15:05:38 is pending for age 1 Of 1 📄 📄 Go Modified	your approval to page	Go.	Show Per Page	Not Sta	Go
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IB Announcement. D Nov 2014-12-05	2014-12-03 16:05:4 Alerts Title PD Test PD035 has I	0 A transfer of 20			AH02 on 2014-12	-03 15:05:38 is pending for lage 1 Of 1 📄 📄 Go Modified 2014-12	your approval o to page	Go	Show Per Page	Not Sta	URL view
IB Announcement Binty 2014-12-05	2014-12-03 16:05:4 Nerts Title PD Test PD035 has l PD TestPD01 has be	0 A transfer of 20 peen activated. en activated.			AH02 on 2014-12	-03 15:05:38 is pending for lage 1 Of 1 📄 📄 Go Modified 2014-12	your approval o to page	Go	Show Per Page	Not Sta	URL view
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Announcements	Verts Title PD Test PD035 has I PD TestPD01 has be eland_Announcer Actions • 0 Title	0 A transfer of 20 been activated. en activated. nent			AH02 on 2014-12	-03 15:05:38 is pending for age 1 Of 1 (a) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c	your approval o to page	Go	Show Per Page	Not Sta	URL view
	Verts Title PD Test PD035 has I PD TestPD01 has be eland_Announcer Actions • 0 Title	0 A transfer of 20 been activated. en activated. nent			AH02 on 2014-12	-03 15:05:38 is pending for age 1 Of 1 (a) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c	your approval o to page	Go	Show Per Page	Not Sta	URL view

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 <u>Figure 3.1</u> 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:

- Click the My Page module link on the Main menu. By default, Manage My Organization is selected and details of your Organization are displayed (<u>Figure 4.1</u> and <u>Table 4-1</u>).
- 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.

ıe	EECS-GO	Reports	Users	Plants	My Page	Support
nage	My Organization					
Page	> Manage My Organ	nization				
		• • •				Clos
-	zation Information	-	_			
1 4	1 Page Of 1		\$	Find	Next 🛃 🕶 🤇	Ð
	anization Informa					
	ganization Name:	Organizatio			Business Id:	IE0000011
	art Date:	2015-01-01	L		End Date:	
GS					Web Address:	
Me	mber Code:	39XR70DC5	G		Billing Reference:	00000000111
					Internal Transaction Without Four Eye Approval	ns No
Loc	cked	No			Four Eye Approval	No
Ext	ternal	No				
	ress					
	eet:	street			PO Box:	
Zip					City, County:	city
	untry:	Ireland			c/o address:	c/o address Organization A
Мо	bile Phone:					
	anization Types					
Pro	oducer					
Trac	ding Schemes					
GO)					
	N					
GLN						
GLN						
	itacts					

Figure 4.1 – Organization and its License details

Table 4-1 – Viewing Organization details

Field Name	Description					
Organization Information	<u>Figure 4.1</u> displays the general details of the Organization including its License details. See <u>Table 4-2</u> 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.
- 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.

My Page > Mar	nage My Organization				
Organization	Information				Open 🗉
					_
General	Type Trading Schemes	Business Contact	Invoice Conta	ct Technical Contact	
General Info	ormation - PradeepSerbia1				
Name	deninyilaisia *		Business Id		* e.g. RS454325325
Start Date	YYYY-MM-DD		End Date	YYYY-MM-DD	
	Four Eye Approval Required	(i)			
	Internal Transactions Withou	it Four Eye Approval (
	Physical Person				
	Block Imports				
	Active				
Billing			Purchase		
reference			Order number		
Domain	Serbia 🔻		Website	http://	1
Domain	Serbia		Member		
			Code	47XD86PR4V	*
Business Addr	ess				
Street					
PO Box					
Zip code	600099 *		City	city	*
Country	- Select - * *				

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).

Field Name	Description						
	Name of the Organization.						
Name	Note: This field might not be editable depending on your domain con- figurations						
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 con- figurations						
Start Date	Start date of the Organization. Not editable.						
End Date	End date of the Organization. Not editable.						
	Note: This is a domain specific functionality and might not be available in your domain. Please contact your Issuing Body to know more.						
Four Eye Approval Required	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 <u>Chapter 6.4.4</u> for further information on approving transfers.						

Table 4-2 – Editing General Information

Member Code	The Member Code in the system given by the Issuing Body. Not editable.					
Website	The Website of the Organization.					
Domain	The Domain of the Organization. Not editable.					
Purchase Order Number (PO Number)	 Space for additional identification number. Can be used e.g. to give a specific reference number for the invoices 					
	Note: This field is Domain specific and might not be visible in your do-					
Block of Imports	Defines whether the Organization is able to block certificates imports. Select the check cox to block 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.					
Billing reference	editable. Note: This field might not be editable depending on your domain con- figurations					
	Invoicing system reference if invoice is enabled in the domain. Not					
Physical Person Active	editable. Refers to the status of the organization: active or not. Not editable.					
Internal Transactions Without Four Eye Approval	 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 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 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 					
	 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 					

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.

Organizat	ion Infor	mation - TestAH				Open
General	Туре	Trading Schemes	Business Contact	Invoice Contact	Technical Contact	
Trading S	chemes					
Trading Sch	nemes		Start Date	End Date		
GO			2013-04-01			
ICS:RECS			2013-04-01			
					Create	



Figure 4.3 – Viewing Trading Scheme Details

4.2.4 Editing Business Contact Details

Note: Fields marked with an asterisk are mandatory

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

Update Back

- 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.

rganization Info	ormation - Test AH01					Open 🖲
eneral Type	Trading Schemes	Business Co	ontact Invoid	e Contact	Technical Contact	
Business Contact	- Test AH01					
First Name		*	Last Name		*	
Middle Name			Title			
Personal Number						
Street		*				
PO Box						
Zip code			City, County		*	
Country	- Select -	*	Salutation			
Email		*	Mobile Phone			
Office Phone		*				
Fax Number						

```
Note: Fields marked with an asterisk are mandatory
```



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**.

Ноп	ie EEC	CS-GO	Reports	Users	Plants	My Page	Support
Mar	nage My Orga	anization	Account Hol	der API			
	Status of AP	PI Disabled	I				
	Emai	il			*	Mobile Phon	eSelect Country Code- *
						Please	enter valid mobile number, it is used for receiving SMS.
							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 <u>4.6</u>).

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

Home	EECS-GO	Reports	Users	Plants	My Page	Support
Manage	My Organization	Account Ho	lder API			
	Status of	f API Enabled	I			
	E	imail datain		1		Mobile Phone
🛩 A	Pl user has been su	ccessfully create	d.			Disable API Reset Client Certificate

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

Home	EECS-GO	Reports	Users	Plants	My Page	Support	
Manage N	ly Organizatio	on Invoice Re	eport				
My Page >	Actor Parame	ters					
Search	Criteria						Close 🗉
	Period Start	2015-04-01			Period E	nd 2016-05-06	
-	ding Scheme	All		Ŧ			

Figure 4.7 – Invoice Report: Search Criteria

Table 4-3 – Table of Action Key

Name	Description			
Period	eriod 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			

Se	earch Criteria					Open
In	voice List					Close 🗉
14	4 1 Page Of	1 Þ Þi 💠	Find Ne:	xt 🛃 • 🚱		
	*					
	Invoice List					
	Invoicing Period: 20:	15-05-01 To 2016-06-15; Tra	ading Scheme: All			
	Invoice Date 🛱	Trading Scheme ‡	Period Start ‡	Period End ‡	Additional Periods 🛊	Amount (NOK) ‡
	2016-06-13 11:49:15	Guarantees of Origin	2016-02-01	2016-02-29	Yes	1 206,00
	2016-05-30 13:40:48	Guarantees of Origin	2016-01-01	2016-01-31	No	800,00

Figure 4.8 – Invoice Report list

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			
	It shows whether the invoice includes earlier invoice periods (aggregated shares).			
Additional Periods	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.			

arch Criteria						Open
voice Details						Close
↓ 1 Page Of 1 ↓	⊳∎ 🍫	Find	Next 🛃 • 🔇)		
Invoice Details						
Name	<u> </u>	-				
Member Code	47%	1	Accounting ID	PR		
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 <u>Table 5-1</u>.

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 (<u>Figure 5.1</u> and <u>Table 5-2</u>). 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

lome	EECS-GO	Reports	Users F	Plants My Pag	e Support	
Manage PD	Register	PD Manage	Meter Readings	View Meter Read	lings MR Declaration	License Expiration Date
Plants > Reg	gister PD					
Production	on Device Re	gistration				
Details		Details				
Location Farmarks		Name		*		
Fuels		Start Date	YYYY-MM-DD	00 📰 *	Commission Date	YYYY-MM-DD *
Technolog Operator Licenses	9 y	Installed Capacity (MW)		*	Estimated annual production (MWh)	
Owners Meters		lssuing body comment		11	Public PD upgrade info in English	
			Auto Genera	te GSRN		
			Grid Connect	ted	Registrar	- Select -
		Grid Area	- Select -	•	Radioactive waste produced (g/MWh)	
		Note: Fields mark	ed with an asteris	sk are mandatory	Save	Submit Reset Next

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				
Gild Alea	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

Plants > Register PD	
Production Device Re	gistration
Details Location Earmarks Fuels Technology Licenses Owners Meters	Location Street Country - Select - City, County * Zip code Latitude * Longitude * Coordinate Code * Reft AlB Fact Sheet 16
	Note: Fields marked with an asterisk are mandatory Save Submit Reset Previous Next

Figure 5.2 – Register PD: Location wizard

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 $x^{\circ}x'x''$ 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: <u>AIB EECS Fact Sheet 16</u>). 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.

Plants > Register PD							
Production Device Regi	stration						
Details	Earmarks						
Location Earmarks	Earmark Name	Description	Earmark Type				
Fuels	Investment Support	Investment Support	Investment Supp	ort			
Technology Licenses	Production Support	Production Support	Production Supp	ort			
Owners Meters	Note: Fields marked with an asterisk a	are mandatory Save	Submit Reset	Previous	Next		

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 <u>EECS Fact Sheet 5</u>. There are four levels in the hierarchy: please select the most accurate description(s).

rioducation berne	e Registration			
Details Location Earmarks Fuels	Fuel Ref: AIB Fact Sheet 5			
Technology	Fuel Name	Code	Burning value, GJ/ton	
Licenses	🖽 🗖 Fossil	F0200000	000,00	
Owners Meters	■ Nuclear/Solid/Radioactive fuel	F03010100		
Meters	Renewable	F0100000	000,00	
	Unspecified	F00000000	000,00	

Figure 5.4 - Register PD: Fuels wizard

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 <u>EECS Fact Sheet 5</u>. Please select the most accurate description. A Production Device can have only one technology code (Figure 5.5).

Production Devic	e Registration			
Details	Technology			
Location Earmarks Fuels	Ref: AIB Fact Sheet 5			
Technology		Technology	Code	
Licenses		Hydropower	Т030000	
Owners		Marine	T040000	
Meters		Not Defined	T999999	
		Nuclear	T060000	
		Other	T070000	
		Solar	T010000	
		Thermal	T050000	
		Wind	T020000	
		, Wind	102000	
	Note: Fields marked v	vith an asterisk are mandatory	ve Submit Reset Previo	us Nex

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 it 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.

Production Devic	Production Device Registration					
Details	Operator					
Location Earmarks Fuels Technology Operator	Select existing	Operated by registrant Select existing AH as Operator Search Operator by Business Id				
Licenses Owners	Operator					
Meters	Business Id	SE0456852	Operator Name	TestAH		
	PO Box		Street			
	City	city	Zip code	02110		
	Country	Finland				
	Note: Fields marl	ked with an asterisk are mand	latory Save Submit	Reset Previo	us Next	

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

Select one of the following:

- Operated by Registrant: The Registrant will be the one operating the device. The Registrant Address is displayed in the lower panel (<u>Figure 5.6</u>).
- 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 <u>5.8</u>).
 - 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).

Plants > Register PD	
Production Device R	egistration
Details Location Earmarks Fuels Technology Operator Licenses Owners Meters	Operator
	Operated by registrant Select existing AH as Operator Search Operator by Business Id Select existing AH as Operator AspireAH_New AspireAH_New3
	Note: Fields marked with an asterisk are mandatory Save Submit Reset Previous Next

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

Production Device Registration						
	Operator	Operator				
Details						
Location		Operated by registrant				
Earmarks	Select existin	g AH as Operator				
Fuels	Search Opera	tor by Business Id				
Technology	Operator Check					
Operator	Business		Check			
Licenses						
Owners						
Meters	Operator					
	Business Id	FI374238752375	Operator Name	AH_Aspire		
	PO Box	pobox	Street	Abdul razak street		
	City	chennai	Zip code	9087		
	Country	Hong Kong				
	Note: Fields marke	ed with an asterisk are mandatory	Submit	Reset Previous Next		

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

Production Device R	stration	
	Operator	
Details	© Operated by registrant	
	© Select existing AH as Operator	
Earmarks		
Fuels	Search Operator by Business Id	
Technology	Operator Charles Check	
Operator	Business Id	
Licenses		
Owners		
Meters	Operator Address	
	Business Id FI12312342 Operator Name *	
	PO Box Street	
	City	
	Country Finland	
	Note: Fields marked with an asterisk are mandatory Save Submit Reset Previous Ne	xt

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.

Plants > Register PD					
Production Device Re	gistration				
Details Location Earmarks	Licenses				
	Add License				
Fuels Technology	Purpose	- Select - 🔻	Allocation Factor (%)	*	
Operator Licenses	License Start Date	YYYY-MM-DD	Installed Capacity		
Owners Meters	License Expiry Date	YYYY-MM-DD	Commissioning Date	YYYY-MM-DD	
	Trading Schemes	*			
	CHP Technology	*	CHP Use of Heat	*	
	CHP PtoH Ratio	*			
	Note: If "Installed Cap will be used.	acity" or "Commissioning Date" are le	eft empty, the correspon	ding fields in the Details menu	
				Add Back	
	Note: Fields marked wit	h an asterisk are mandatory	ave Submit F	teset Previous Next	

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 <u>AIB website</u>
Action keys	
Add	Click add to save a created license
Back	Click back to return to the previous window

GO 2015-01-01 Page 1 Of 1 O Go to page Show Per Page 10 Constraints of the second sec								stration	oduction Device Regi
Earmarks Fuels Technology Operator Commers Meters								Licenses	
GO 2015-01-01 100 100 100 100 100 100 100 100 1	Delete	Edit	ation Factor (%)	xpiry Date A	License E	rt Date	License Sta	License	marks
Deperator R Page 1 Of 1 R Go to page Go Show Per Page 10 T Journers Weters Creation	×	١.	100				2015-01-01	GO	
Owners Creat	•	10	Go Show Per Page	Go to page		Page 1 Of 1	R R		
Neters Crea									
	eate								ters
	cate								
Note: Fields marked with an asterisk are mandatory									
				r	mandatory	n asterisk are	marked with a	Note: Fields	
Save Submit Reset Previous					mandatory	n asterisk are	marked with a	Note: Fields	

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 <u>Figure 5.12</u>. Field description is presented in <u>Table 5-7</u>.

- 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
- The system offers two options to select the owner AH. You can either select the owner AH from the list of existing AHs (<u>Figure 5.14</u>) or give a Business ID to select an Account Holder (<u>Figure 5.15</u>).
 - 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.

Plants > Register PD								
Production Device	ce Registration							
Details	Owners							
Location Earmarks Fuels	Registrant owns 10							
	Owner Name	Business Id	City, County	Country	Zip code	Percentage	Edit	Delete
Technology Licenses	Test AH01	IE000000001	city county	Ireland	0001	100	Ð	×
Owners								
Meters								
	Note: Fields marked w	ith an asterisk are mar	ndatory					
				Save S	Submit	Reset Pre	vious	Next

Figure 5.12 - Register PD: Owners wizard

Details	Owners							
Location Earmarks	Registrant owns 100	1%						
Fuels	Owner Name	Business Id	City, County	Country	Zip code	Percentage	Edit	Delete
Technology Licenses	Test AH01	IE000000001	city county	Ireland	0001		0 🕪	×

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.

Production Device Reg	istration
Details Location Earmarks Fuels Technology Operator Licenses Owners Meters	Owners Registrant owns 100% Select existing AH as Owner Search Owners by Business Id Select existing AH as Owner Select existing AH as Owner AH Aspire AH 1001 Allwinds AB Ownership Percentage
	Note: Fields marked with an asterisk are mandatory Save Submit Reset Previous Next

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

Production Device Reg	istration
Details Location	Owners C Registrant owns 100%
Earmarks Fuels Technology Operator Licenses Owners Meters	 Select existing AH as Owner Search Owners by Business Id Owner Business Id Ownership Percentage Check Back
	Note: Fields marked with an asterisk are mandatory Save Submit Reset Previous Next

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

Plants > Register PD	
Production Device Reg	istration
Details Location Earmarks Fuels Technology Licenses Owners Meters	Owners Registrant owns 100% Select existing AH as Owner Search Owners by Business Id Owner Business Id Ownership Percentage
	Note: Fields marked with an asterisk are mandatory Save Submit Reset Previous Next

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 <u>Table 5-8</u>. 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.

Production Device Reg	istration								
Details	Create Meter								
Location	Meter Code		*						
Earmarks	Grid Reference		*						
Fuels Technology	MWh Coefficient	1	Manual						
Operator Licenses	Description		Incremental	l.					
Owners Meters					Create	Back			
	Gross Measuremen								
	Uross measurement								
	Metering description	n							
						*			
						~			
	Note: Fields marked v	vith an asterisk are mandatory	Save	Submit	Reset	Previous			

Figure 5.17 - Register PD: Meters wizard

Production Device Regi	stration							
Details	Create Meter							
Location Earmarks	Meter Code							
Fuels Technology	Grid Reference							
Operator Licenses Owners	MWh 1 Manual							
Meters	Description Incremental							
	Initial Reading							
	Create Back							
	Gross Measurement							
	✓Gross Measurement							
	Estimated Declared							
	Net production percentage *							
	Metering description							
	Note: Fields marked with an asterisk are mandatory Save Submit Reset Previous							

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).

lome l	EECS-G	O Report	s User	rs i	Plants	My Page	Su	upport					
Manage PD	Reg	jister PD Vie	w Meter Rea	dings	License Expir	ation Dat	te						
Plants > Mana	age PD												
earch Criteri	a										Open 🖲		
oduction De	evices												Close
4 1	Page C	Df1 ▷ ▷I	4		Find Next	- 🛃 -	٢						
Productio		vices											
	on de	vices ant: All; Trading	Schemes: - A	All -; Comb	usting: All; Lo	cked: All	; Status: /	Active; Earn	ark: - All -				
	on der Registri		Schemes: - A Grid refere code)		Issuing	In	stalled	Active; Earn Status \$	ark: - All - Owner ‡	Registrant ‡	Fuel Ç	Technology ‡	Locked ‡

Figure 5.19 – Manage PD: Production Devices list

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).

Table 5-9 – Production Devices: Field Description

5.3.1 Search for a Production Device

Navigate to **Plants>Manage PD**.

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

Plants > Manage PD						
Search Criteria						Close 🗉
PD Name						
GSRN					Show current and future PDs	
Grid Area	- Select -	•				
Locked	- All -			Status	Active Approve new version re-audit	▲ ■
Installed Capacity (MW))					
From				То		
Date of Commissioning						
From	YYYY-MM-DD			То	YYYY-MM-DD	
Start Date						
From	YYYY-MM-DD			То	YYYY-MM-DD	
Stop Date						
From	YYYY-MM-DD			То	YYYY-MM-DD	
License Expiry Date						
From	YYYY-MM-DD			То	YYYY-MM-DD	
Fuels and Technology						
	Fuel				Technology	
- All - F00000000 - Unspecifie F01000000 - Renewable F01010000 - Renewable AlB EECS Rules Fact Sheet	e/Solid		•	- All - Not Defined T010000 - Solar T010100 - Solar/Photo	ovoltaic	•
Other	2					
Trading Schemes Earmark	- All - Association_IE-GO GO - All - AER Investment Support REFIT	×		Combusting Grid Reference	- All - V	
					Sear	ch Reset

Figure 5.20 – PD Search Criteria

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.

- 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).
- If the Production Device has several versions, the links to previous versions are shown on the top of the details view. <u>Table 5-11</u> explains the hyperlinks and the action keys available in this view.
- 3. Click **Edit** to make changes in Production Device. Refer to <u>Registering a Production Device</u> for details.

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	Details					
	View PD registration inform	ation View All Ve	ersions Vie	w Meter Read	ding	
	Version 2 (Start Date: 2)	015-06-01: Stop Date:	· Active)			
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Figure 5.21 – Production Device Details

Name	Description				
View PD registration	This is a domain specific form and might not be available in all domains.				
Information	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 <u>Chapter 5.5</u> 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				

Table 5-11 – Production Device Details Hyperlinks

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 <u>Figure 5.22</u>.

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.

duction Device	25			Ope
duction Device	e: 6430024066960	001234 - 12,3MV	•	Clos
4 1 Pag	ge Of 3 🕨 🚺	•	Find Next	• 😨
g <u>re</u> z	<u>kel</u>	Productio	n Device Regist	AIB association of issuing bodies
Declaration of cl	hange:	Yes		
Owner of the F	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 F	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 F	Production Device		Power of attorney for	rm (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 Pr	oduction 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 th	e Production Dev	ice		
Name:			Contact Person:	
Street:			Mobile Phone:	
Postal Code:			Fax:	
City, County:			Email :	

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

arch Criteria							
duction Devices							Open
duction Device: 64	30024066960012	234 - 12	,3MW - PD examp	le			Open
arch Meter Reading	s						Close
Start Period	2015-06-01	00	00	End Period	2015-11-20	23 59	
						Search	Reset
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	D example - 643002	2406696		ext 📕 • 🛞			
Meter Reading	D example - 643002	2406696		ext 📕 • 🛞			
Meter Reading	D example - 64300; 06-01; to - ;		5001234	ext 📕 • 🛞			
Meter Reading Production Device: P Version: from 2015-(D example - 64300; 06-01; to - ;		5001234	ext 📕 • 🛞			
Meter Reading Production Device: P Version: from 2015-(D example - 64300; 06-01; to - ;	d End: 2	5001234 015-11-20: 23: 59;	ext 🛛 🛃 • 🛞	Status ‡	Meter Va	lue ‡
Meter Reading Production Device: P Version: from 2015-0 Period Start: 2015-0	D example - 64300;)6-01; to - ; 6-01: 00: 00; Perioc	d End: 2 :ient \$	5001234 015-11-20: 23: 59;		Status ‡ Approved		lue ¢ 23,657

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 <u>Chapter 5.5.1</u>

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.
- The task to confirm or approve the changes will be shown on the start page of the application (Figure 2.2).
- 4. See <u>Chapter 5.1</u> 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]".

Change issuing account for PD example				Close 🗉
Actor Name: Organization A				
Owner Name	Ownership %	Account Purpose	Issuing Account	
Organization A	50	Disclosure	643002406600048355 - Default Account	•
Organization C	25	Disclosure	643002406600048355 - Default Account	•

Note: Change your Issuing Account for this Production device.

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 <u>Production Device details</u> 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 <u>Chapter 5.1</u> 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.

Home	EECS-GO	Reports	Users	Plants	My Pa	ge S	Support					
Manage PD	Register PD	Manage N	Aeter Readings	View Me	eter Read	lings M	R Declaration	License E	cpiration D)ate		
Plants > Lice	ense Expiration Dat	te										
Search Crite	ria										_	Open 🖲
Production I	Devices								CI	ose 🗉		
14 4 1	Page Of 1 🕨			Find Ne	xt 🛃	• 🐵						
	tion devices	License Expir	ry Date: 2015-07	'-10 To 2021	-01-08; T	rading Sche	mes: - All -; Co	mbusting: All;	Locked: All;	: Status: Acti	ive;	-
Owner: Al Earmark:	ll; Registrant: All;	¢ GSRN \$	ry Date: 2015-07	'-10 To 2021 Installed Capacity,		rading Sche Status ‡ Active	rmes: - All -; Co Locked	License	e tion ≎		ive; ¢	-

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 <u>Chapter 5.3.2.1</u>), 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.

Home EECS-GO	Reports	Users	Plants	My Page	Support		
Manage PD Register	PD Manage	Meter Readings	View M	eter Readings	MR Declaration	License Expiration Date	
Plants > View Meter Read	lings						
Search Criteria							Close 🗉
Meterreading Star	2015-06-01	00 00			Meterreading End	YYYY-MM-DD 🛄 23 59	
PD Name							
GSRN							
Grid Area	- Select -		•				
Installed Capacity (MW	,						
From	,				То		
Date of Commissioning					10		
From	YYYY-MM-DD				То	YYYY-MM-DD	1
Start Date							
From	YYYY-MM-DD				То	YYYY-MM-DD	Tia .
Stop Date							
From	YYYY-MM-DD				То	YYYY-MM-DD	
License Expiry Date							
From	YYYY-MM-DD				То	YYYY-MM-DD	
Fuels and Technology							
	Fi	uel		_		Technology	
- All - F00000000 - Unspecifie F01000000 - Renewable F01010000 - Renewable	2			• •	- All - T010000 - Solar T010100 - Solar/Photov T010101 - Solar/Photov		· · · · · · · · · · · · · · · · · · ·
AIB EECS Rules Fact Sheet	5						
Other							
Trading Schemes	- All - Association_HEC GO ICS:RECS	I-GO	÷		Combusting	- All -	
Earmark	- All - Feed-in tariff Investment Supp	port	•		Grid Reference		

Figure 5.26 – View Meter Readings: Search Criteria

arch Criteria									Open
ew Meter Readings									Close
↓ 1 Page Of 1		Find Next 🛛 🔍 🗸	٢						
Meterreadings									
Meterreading Period: 201		Owner: All; Registrant: ,	All; Trading Sch	emes: - All -;	Con	nbusting: All;			
		Owner: All; Registrant: ,	All; Trading Sch	emes: - All -;	Con	nbusting: All;			
Meterreading Period: 20: Locked: All; Status: Activ	e; Earmark: - All -		All; Trading Sch Meter Type \$	emes: - All -; Metering Start	¢	nbusting: All; Metering End \$	Status \$	Meter 🛊 Value 🕈	
Meterreading Period: 20: Locked: All; Status: Activ	e; Earmark: - All -		Meter Type ‡	Metering		Metering .	Status \$ Approved		
Meterreading Period: 20: Locked: All; Status: Activ GSRN \$	re; Earmark: - All - Production Device Name	Grid Reference \$	Meter Type \$	Metering Start		Metering End 🕈		Value *	
Meterreading Period: 20: Locked: All; Status: Activ GSRN \$ 57071500000000000000	re; Earmark: - All - Production Device Name Wind PD01	Grid Reference \$	Meter Type \$ Incremental Incremental	Metering Start 2015-06-01		Metering End 2015-06-30	Approved	Value ▼ 385,621	

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).

age PD Register PD Manage Meter Readings View Meter Readings MR Declaration License Expiration Date ts > Manage Meter Readings earch Criteria Earch Meter Readings Close Close Production devices Ovner: All; Registrant: All; Trading Schemes: - All -; Combusting: All; Locked: All; Status: Active; Earmark: - All -		EECS-GO	Reports	Users	Plant	s N	ly Page	Support			
Arach Criteria Arach Meter Readings Close Close Cl	ge PD	Register PD	Manage	Meter Readu	ngs	View Mete	er Readings	MR Declarat	ion License	Expiration Da	ate
Barch Meter Readings Close Image: Page Of 1 Production devices Production devices Owner: All; Registrant: All; Trading Schemes: - All -; Combusting: All; Locked: All; Status: Active; Earmark: - All -	s > Man	age Meter Readi	ngs								
I Page Of 1 Image: Find Next Image: Find Next Production devices Owner: All; Registrant: All; Trading Schemes: - All -; Combusting: All; Locked: All; Status: Active; Earmark: - All -	nrch Cri	iteria									
Production devices Owner: All; Registrant: All; Trading Schemes: - All -; Combusting: All; Locked: All; Status: Active; Earmark: - All -	rch Me	eter Readings									Close 🗉
Owner: All; Registrant: All; Trading Schemes: - All -; Combusting: All; Locked: All; Status: Active; Earmark: - All -			N N8 [Find LA	laut 🗖	L . @				
	4 1	Page Of 1] eind Fi	iext 🐱	* .				
	Produ Owner: Produ	uction device : All; Registrant: ction Device Na	es All; Trading !	Period ‡	-; Combi	usting: All	; Locked: All				
Wind PD01 2014-01-01 643002406999000156 View MR Missing MR Add MR	Produ Owner: Produ	uction device : All; Registrant: ction Device Na	es All; Trading !		-; Combi	usting: All	; Locked: All	; Status: Active; <u>View MR</u>	Earmark: - All - <u>Missing MR</u>	Add N	<u>1R</u>
Wind PD01 2014-01-01 643002406999000156 View MR Missing MR Add MR PD2 2014-02-01 64300240699900033 View MR Missing MR Add MR	Produ Owner: Produc Wind I	uction device : All; Registrant: ction Device Na	es All; Trading !	Period \$ 2014-01-01	-; Combi GS 64:	usting: All RN \$ 300240699	; Locked: All	<u>View MR</u>	Missing MR		

Figure 5.28 – Manage Meter Readings functionality

- To add meter readings click on Add MR link for the PD that you want to add MR to. Screen as <u>Figure 5.29</u> 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)

Search Criteri	1						Open
Search Meter	Readings					Open 🙂	
Create MR							
	YYYY-MM-DD 100 00 *	End Period	YYYY-MM-DD	23 59 *	Get Meters		
	YYYY-MM-DD ■ 00 00 •	End Period	YYYY-MM-DD	23 59 *	Get Meters	-	
Create MR Start Period Meter Meter value		• End Period	YYYY-MM-DD	23 59 *	Get Meters		
Start Period Meter	- Select - 🗸 🔹	End Period	YYYY-MM-DD	23 59 *	Get Meters		

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.

1e	EECS-GO	Reports	Users	Plants	My Page	Support	
nage PD	Register PD	Manage I	Meter Readings	View Me	eter Readings	MR Declaration	License Expiration Date
nts > MR I	Declaration						
earch Cri	iteria						
roductio	on Devices						Close
		N NR T		Find Next	L • 🚯		
4 1	Page Of 1						
Produ Owner:	uction device	25 All; Trading S	Schemes: - All -;	Combusting		tatus: Active; Earma	ark: - All -
Produ	uction device : All; Registrant: ction Device Nat	25 All; Trading S	Schemes: - All -; Period \$	Combusting	GSRN ‡		
Produ	uction device	25 All; Trading S	Schemes: - All -;	Combusting			

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

Production De	vices			Close 3
Create Declara	ation: PDtest1 - 643002406666004	1937 - 2013-01-01		3 Close
Declaration Type	Fuel Declaration	1		
Metering Periods	2013-01-01 00:00 To 2013-01-31 23	59 N		
Declaration for p	plant PDtest1, 2013-01-01 00:00 To 20	13-01-31 23:59		
Declaration for p Production for p	plant PD5est1, 2013-01-01 0000 To 20	Declaration Percentage	Description	
Declaration for p Production for p			Description	
Declaration for p Production for p Fuel Innewable,91eat/V eat-601040201	veriod: 12,360 MWh	Declaration Percentage	Description	

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.
- The Issuing Body will be notified about your Issuing Request and certificates will be issued in due date
- 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 <u>Chapter</u> <u>5.3.4</u>.

Home	EECS-GO	Reports	Users	Plants	My Page	Support	
Manage Pl	D View Met	er Readings	MR Declaratio	n License	Expiration Date	Issuing Request	
Plants > Is	suing Request						
Search	Criteria						Close ^E
Search	Criteria						Close ^E
Search (Criteria	Search Date	2016-04				Close
Search (Criteria	Search Date	2016-04				Close

Figure 5.32 – Issuing Request Search

Search Criteria Open											
Issuing Request Close 🗉											
GSRN	Production Device Name	Grid Reference	Metering Start	Metering End	Status	Initial Meter Value	Available for Issuing	lssue All	Requested Amount		
643002406996000012	Test PD1 -	34Z0 00/////1015 00Z	2016-03-01	2016-03-31 23:59:00	Ready For Issuing	27,504	27,504		0,00		
643002406996000029	Test PD2 -	3422000000000K	2016-03-01 00:00:00	2016-03-31 23:59:00	Ready For Issuing	117,640	117,640		0,00		
543002406996000036	Test PD3 - Derdop I	342 05/2R1 100 100K	2016-03-01 00:00:00	2016-03-31 23:59:00	Ready For Issuing	3850,200	3850,200		0,00		





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 <i>Initial Meter Value</i> 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 <i>Available for Issuing</i>					
	If selected, it is not possible to add a volume in the <i>Requested Amount</i> 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 \square 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.

Reports	Users Pl	ants My Pa	ge Su	pport		
Account Statement	t Search Trans	sactions Searc	h Certificates	Transfer	Approval	PD Transaction Sumr
ounts						
39XE93RH2F						Close 🗉
						Create Account
nunts						
ounts				Volume	Evolution	
	ccount Name 金	Stat	us Public	Volume of GO	Expiring Certificates	Operations
	Account Statement	Account Statement Search Trans	Account Statement Search Transactions Search	Account Statement Search Transactions Search Certificates	Account Statement Search Transactions Search Certificates Transfer	Account Statement Search Transactions Search Certificates Transfer Approval

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 <u>Account Statement</u> 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 with a

the status column and an inactive account with an with an

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.

Manage Accounts -		Open ±
Modify Account- pdlaccount		
Account Number	643002406600018792	
Account Name	pd1account *	
	Active Public	
Created On	2012-03-27	
ote: Fields marked with an asterisk are m	andatory	

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.

Manage Accounts -			Open 🗄
Move Account			
From Account	pd1account		
Destination Account	Default Account	*	
Note: Fields marked with an asteris	k are mandatory		
			Move Back

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.

Open 🗄

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.

Manage Accounts -			Open 🙂
Create Sub Account			
Parent Account Name	pd1account		
Account Name		*	
	🛛 Active 📝 Public		
Note: Fields marked with an asterisk are mandatory			
			Create Back



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.
- 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 <u>Chapter 6.8 Search Certifi-</u> <u>cates</u>)
 - Select the required bundles by checking the corresponding checkboxes.
- 5. Click **Transfer** 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 ber 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 <u>6.8)</u>.

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.

Manage Accounts - 39XA24KM5F	Open 🗄
Search Criteria	Open 🖲
Certificates	Close 3
	Transfer Ø Cancel Certificates
Select all 10148 certificates	
Select certificates by bundle	
Select certificates by PD	

Figure 6.6 – Transfer Certificates: Select all

C	Certificates Close														
										•	Transfer 🥝 Ca	ancel Certif	ficates		
Select all 4264230 certificates ® Select certificates by bundle © Select certificates by PD © Select certificates by account															
	Certificate Number (From - To) 🕿	Volume	Account Name	Account Number	Issuing Body	Fuel	Technology	Earmark	Issuing Date	Production StartDate		Production Device Name	GSRN	Installed Capacity	Trading schemes
1	642061641322500410037100061363 To 642061641322500410037100061531	169	XXX:			F01010000 - Renewable/Solid			2004-03- 16	2004-01-01	2004-01-31	Unknown	642061641313005219	60 MW	GO

Figure 6.7 – Transfer Certificates: Select by bundle

EECS CO > Manage Accounts

Certificates		Open 🗄
Transfer certificates		
Total certificates volume available	72162	
Give Certificate amount	* Transfer all	
Domain	- Select - 🔻	
Account Holder	- Select - 🔻	
Account	- Select - 🔹 🔹	
Enter account no/member code		
Message to Receiver		Note: Message is shown to receiver inside the CMOgrexel systems.
Note: Fields marked with an asterisk a	e mandatory	Transfer Back

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).
- 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 <u>Chapter 6.8 - Search Certificates</u>.)
 - Click **Select** to select the required certificates.
- 5. Click Cancel Certificates to move to cancel page. The Certificate Cancellation page is displayed (Figure 6.9). Description of input data presented in <u>Table 6-2</u>.
- 6. Enter the Cancellation data in the Cancellation screen.
- 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.

Certificate Cancellation			
Selected certificate amount	23481		
Amount of certificates to Cancel	*		
Country of Consumption	- Select -	*	Note: Certificates may only be cancelled for domestic consumption in countries where the EECS is not implemented.
Name of Beneficiary		*	
Location of beneficiary		*	Department, unit, division, or geographical branch
Usage Category	- Select -	*	Support: Cancelled to receive financial support, Disclosure: Cancelled under a green labeling
Consumption Period Start	YYYY-MM-DD 🗰 *		scheme or as proof of supply to consumers or
Consumption Period End	YYYY-MM-DD		for own use. Has not been used to receive financial support., Other
Type of beneficiary	- Select -	*	
Cancellation Purpose		^	
Publishing	Make this cancellation statement publicly ava	ilable and create	e a link

Figure 6.9 – Certificate Cancellation

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.

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

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 spe-
	cific functionality and may not be available in your do- main. 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 (<u>Figure 6.10</u>). Field description presented in <u>Table 6-3</u>. If no transactions are scheduled, a corresponding message is shown.

Manage Accounts - Open								n 🗉	
Existing	Schedules - Defa	ult Account					Crea	te Scl	nedule
Created Date	Next Execution date ▲	Last Execution date	Last run date	Transaction Type	Occurrence	Destination Account Name	Certificate Count	Edit	Delete
2012-03-28	2012-03-29	-	-	Transfer	Specific day	pd1account - 643002406600018792	10 Certificates	Ð	×
	🖻 🗹 Page 10f 1 🗈 🖻 Go to page 🔄 🗖 Go Show Per Page 10								10 🔻

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 Create Schedule 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.
- Figure 6.11 shows the frame displayed if the Transaction type Transfer is selected to occur monthly.
- Figure 6.12 shows the frame displayed if the Transaction type Cancel is selected to occur Daily. Refer to <u>Table 6-4</u> 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.

Create Schedule - Defau	It Account			
Transaction Type	Transfer	¥	*	
Occurrence	- Select -	¥	*	
	 Specified Amount % of all incoming certificates % of all certificates in account 			
Amount	*			
Transaction details				
To domain	Finland	~	*	
Account Holder	- Select -	¥	*	
Account	- Select -	~	*	
Message to Receiver		1.		Note: Message is shown to receiver inside the CMO.grexel system.
Note: Fields marked with an as	terisk are mandatory			
				Create Schedule Back Reset

Figure 6.11 – Certificates: Create Schedule (Transfer)

Create Schedule - Defau	It Account		
Transaction Type	Cancel	v *	
Occurrence	- Select -	¥ *	
	Specified Amount		
	O% of all incoming certificates		
	O% of all certificates in account		
Amount	*		
Transaction details			
Country of Consumption	- Select -	*	Note: Certificates may only be cancelled for domestic consumption in countries where the EECS is not implemented.
Beneficiary Name		*	
Location of beneficiary		*	
Type of beneficiary	- Select -	× *	
Consumption Period Start	YYYY-MM-DD		
Consumption Period End	YYYY-MM-DD		
Usage Category	- Select -	× *	
Cancellation Purpose			
Note: Fields marked with an as	terisk are mandatory		
			Create Schedule Back Reset

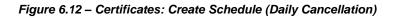


Table 6-4 – Create Schedule: Field Description (mandatory fields marked with an asterisk)

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)
	Select :
	Specific day — Selected event occurs only on a specific date.
Occurrence *	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 <u>Table 6-2</u> .
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 <u>Schedule Transaction</u> 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.

Transaction Type	Transfer		•	*	
Occurrence	Specific day		•	*	
	Specified Amount				
	% of all certificates in acc	ount			
Amount	10	*			
Execution Date	2012-03-29	*			
ransaction details					
To domain	Finland		-	*	
Account Holder	AH_Aspire FI374238752375		•	*	
Account	pd1account		•	*	
Message to Receiver			A 		Note: Message is shown to receiver inside the CMO.grexel system.
ote: Fields marked with an as	terisk are mandatory				

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 <u>Chapter 4.2.1</u>). 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 <u>Chapter 4.2.1</u>).

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 <u>Chapter 2.3</u> for more information).

 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.

- 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'.

Pending Tasks		
Created▼	Title	Status
2015-07-17 09:20:42	A transfer of 15 certificates to account AspireAH on 2015-07-17 09:20:42 is pending for your approval	Not Started
	📓 🗟 Page 1 Of 1 🗈 🖻 Go to page 🧰 🚺 Show Per Page	10 Go

ie	EECS-0		ports	Users	Plants	My Page	Support			
age Ac	counts	Account S	tatement	Searc	h Transactions	Search Certific	ates Tra	insfer Appro	val I	PD Transaction Summ
5-GO >	Transfer	Approval								
earch C	riteria									
ccount	Statem	ent								Close 🗉
4 [1 Pa	age Of 1 👂		4	Find	Next 🛛 🛃 🗸	۲			
Tran	sactio	16								
11 au	Sacuo	15								
Searc	h criteri	a: Report typ	e: Transar	tions: Tra	nsaction Period	2015-06-17 To 20	15-07-17: Do	main: Ireland	Account	+
Holder	r: Test Ał	101; Account:	All; Produ	uction Dev	ice: All; Transact	2015-06-17 To 20 ion Type: Export,	Internal Tran	sfer,Transfer;	Fuel: - A	II -)
Holder	r: Test Ał	101; Account:	All; Produ	uction Dev	ice: All; Transact		Internal Tran	sfer,Transfer;	Fuel: - A	II -)
Holder	r: Test Ał	101; Account:	All; Produ	uction Dev	ice: All; Transact	ion Type: Export,	Internal Tran	sfer,Transfer;	Fuel: - A	II -)
Holder Tradin	r: Test Ał Ig Schem	101; Account:	All; Produ nsumptior	uction Dev n country:	ice: All; Transact	ion Type: Export, leneficiary: All; U	Internal Tran	sfer,Transfer;	Fuel: - A er party:	All
Holder Tradin Transa Date	r: Test Al ng Schem action \$	H01; Account: es: - All -; Co Transaction	All; Produ nsumption Trans Numb	uction Dev n country:	ice: All; Transact Select; Type of B	ion Type: Export, leneficiary: All; U m + Accour It- IE- Aspi	Internal Tran sage Catego nt To 🗘	sfer,Transfer; ry: All; Count	Fuel: - Al er party: Status	II -; All ; ≎ ; Transfer
Holder Tradin Transa Date 2015	r: Test Al ng Schem action \$	+01; Account: es: - All -; Co Transaction Type	All; Produ nsumption Trans Numb	action Dev action	ice: All; Transact Select; Type of E Account From Default Accourt	ion Type: Export, leneficiary: All; U m + Accour It- IE- Aspi	Internal Tran Isage Catego It To \$ reAH-	sfer,Transfer; ry: All; Count Volume \$	Fuel: - A er party: Status 5 Pending Approve	II -; All ; ≎ ; Transfer
Holden Tradin Transz Date 2015 09:2	r: Test Al ng Schem action \$	H01; Account: es: - All -; Co Transaction Type Transfer	All; Produ nsumption Trans Numb	action Dev action	ice: All; Transact Select; Type of E Account From Default Accourt	ion Type: Export, leneficiary: All; U m + Accour It- IE- Aspi	Internal Tran isage Catego It To \$ reAH- 105600044517	sfer,Transfer; ry: All; Count Volume \$	Fuel: - A er party: Status 5 Pending Approve	II -; All ; ≎ ; Transfer
Holden Tradin Transz Date 2015 09:2	r: Test Al ag Schem action \$ -07-17 0:41	H01; Account: es: - All -; Co Transaction Type Transfer	All; Produ nsumption Trans Numb	action Dev action	ice: All; Transact Select; Type of E Account From Default Accourt	ion Type: Export, leneficiary: All; U m + Accour It- IE- Aspi	Internal Tran isage Catego It To \$ reAH- 105600044517	sfer,Transfer; ry: All; Count Volume \$	Fuel: - A er party: Status 5 Pending Approve	II -; All ; ¢ ; Transfer al
Holden Tradin Transz Date 2015 09:2	r: Test Al ag Schem action \$ -07-17 0:41	H01; Account: es: - All -; Co Transaction Type Transfer	All; Produ nsumption Trans Numb	action Dev action	ice: All; Transact Select; Type of E Account From Default Accourt	ion Type: Export, leneficiary: All; U m + Accour It- IE- Aspi	Internal Tran isage Catego It To \$ reAH- 105600044517	sfer,Transfer; ry: All; Count Volume \$	Fuel: - A er party: Status 5 Pending Approve	II -; All ; ¢ ; Transfer al
Holden Tradin Transz Date 2015 09:2	r: Test Al ag Schem action \$ -07-17 0:41	H01; Account: es: - All -; Co Transaction Type Transfer	All; Produ nsumption Trans Numb	action Dev action	ice: All; Transact Select; Type of E Account From Default Accourt	ion Type: Export, leneficiary: All; U m + Accour It- IE- Aspi	Internal Tran isage Catego It To \$ reAH- 105600044517	sfer,Transfer; ry: All; Count Volume \$	Fuel: - A er party: Status 5 Pending Approve	II -; All ; ¢ ; Transfer al
Holden Tradin Transz Date 2015 09:2	r: Test Al ag Schem action \$ -07-17 0:41	H01; Account: es: - All -; Co Transaction Type Transfer	All; Produ nsumption Trans Numb	action Dev action	ice: All; Transact Select; Type of E Account From Default Accourt	ion Type: Export, leneficiary: All; U m + Accour It- IE- Aspi	Internal Tran isage Catego It To \$ reAH- 105600044517	sfer,Transfer; ry: All; Count Volume \$	Fuel: - A er party: Status 5 Pending Approve	II -; All ; ¢ ; Transfer al

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

Home	EECS-GO	Reports	Users	Plants	My Page	Support		
Manage A	counts	Account Statement	Search	Fransactions	Search Certific	ates PD Trans	action Summary	
EECS-GO >	Account Sta	atement						
Search C	riteria							Close 🗉
P	eriod Start	2015-10-20			Period	End 2015-11-20	0 🛄	
	Account	- All -		•				
							Search	Reset

Figure 6.16 – Account Statement search criteria

								Open
count Statem	ient							Close
	age Of 2 🕨 🖡	npleted transacti	ons)	Find Next	e 📕 • 🛞			
ACCOUNT ST	atement							
	ount Holder:			Cuyatint	-			
Address of A	ccount Holder:			Curre-Dir				
Member cod	e of Account Hol	der:		39XW08K	356			
Account Sta	tus:							
-	nce as at 2015-	11-20:		-0000				
Difference				1510				
Transaction ‡ Date	Transaction Type	Transaction Number	¢	Account From ‡	Account To ‡	Volume ‡		
2015-11-12 11:24:20	Internal Transfer	2015111200022		Default Account- 643002406600048294	ICICI- 643002406600048317	-1		
2015-11-12 11:24:20 2015-11-12 11:24:20	Internal Transfer			Default Account- 643002406600048294 Default Account- 643002406600048294		-1	Select Certificates	
11:24:20 2015-11-12				643002406600048294 Default Account-	643002406600048317 ICICI- 643002406600048317 Ltd- 5078	1	Select Certificates	
11:24:20 2015-11-12 11:24:20 2015-11-12 11:04:59 2015-11-06 11:19:04	Internal Transfer	2015111200022		643002406600048294 Default Account- 643002406600048294 Default Account- 643002406600048294 Axis- 543002406600048294	643002406600048317 ICICI- 643002406600048317 Ltd-	1	Select Certificates	
11:24:20 2015-11-12 11:24:20 2015-11-12 11:04:59 2015-11-06 11:19:04 2015-11-06 10:59:23	Internal Transfer Transfer	2015111200022 2015111200018		643002406600048294 Default Account- 643002406600048294 Default Account- 643002406600048294 Axis-	643002406600048317 ICICI- 643002406600048317 Ltd- NO- figure 6078 NO- figure 6078 NO- figure 6078 Akis-	1 er -1	Select Certificates Select Certificates	
11:24:20 2015-11-12 11:24:20 2015-11-12 11:04:59 2015-11-06 11:19:04 2015-11-06 10:59:23 2015-11-06 10:59:23	Internal Transfer Transfer Export	2015111200022 2015111200018 2015110600017		643002406660048294 Default Account- 643002406600048294 Default Account- 643002406600048294 Axis- NO- Axis-	643002406600048317 ICICI- ICICI- LId- IId- NO- Axis-	1 tr -1 -8	Certificates Select Certificates	
11:24:20 2015-11-12 11:24:20 2015-11-12 11:04:59 2015-11-06 10:59:23 2015-11-06 10:59:23 2015-11-06 10:23:39	Internal Transfer Transfer Export Correction	2015111200022 2015111200018 2015110600017 2015110600016		64300246660048294 Default Account- 64300246660048294 Default Account- 64300246660048294 Axis- 824 No- 824 No- 824 Xxis-	641002/066600/8317 CICICI 643002/06600/8317 Ltd- Ltd- 078 NO-1 5000 Axis- NO-1 5000 CICICI	1 er -1 -8 8	Certificates	
11:24:20 2015-11-12 11:24:20 2015-11-12 11:04:59 2015-11-06 10:59:23 2015-11-06 10:59:23 2015-11-06 10:23:39 2015-11-06 10:23:39	Internal Transfer Transfer Export Correction Export Export Export	2015111200022 2015111200018 2015110600017 2015110600018 2015110600014		643002406660048294 Default Account- 643002406600048294 Akis- 0.0.4004000000000000000000000000000000	6-1002/06600048317 CICICI 6-1002/0660048317 Ltd- Ltd- NO- /rgadometergy Axis- NO- /rgadometergy befault Account- 6-1002/46660048254 NO- /rgadometergy NO-	1 tr -1 -8 8 -8	Certificates Select Certificates Select	
11:24:20 2015-11-12 11:24:20 2015-11-12 11:04:59 2015-11-06 10:59:23 2015-11-06 10:59:23 2015-11-06 10:23:39 2015-11-06	Internal Transfer Transfer Export Export Import	2015111200022 2015111200018 2015110600017 2015110600018 2015110600014		6-1302340650048294 Default Account- 6-1300340650048294 Arki- 8-1300340650048294 Arki- NO- Arki- NO- Arki-	6-1302/40660048317 CICICI- 6-1302/40660048317 Lid- Kas- Kas- Kas- Kas- Kas- Kas- Default Account- Generative Default Account- 6-1302/40660048294 NO- Account- MO- MO- MO- MO- MO- MO- MO- MO	tr -1 -8 8 -8 4	Certificates Select Certificates Select	

Figure 6.17 – Account Statement (transactions)

earch Criteria									Open
count Statemen	t								Close
Transactions Transactions overv	iew (only com	pleted transac	tions)						
4 1 Page	e Of 1 ▷ ▷	\$		Find Ne	ext 🔍 • (٢			
Account Star Search criteria: Holder au judim country: All; Typ	Report type:	Production D	evice: All;	; Transaction T					
Search criteria: Holder - cayacing	Report type: 	Production D y: All; Usage	evice: All; Category	; Transaction T		II -; T	mes: -)	mption	aı \$

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 <u>Select Certificates</u> . 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 <u>Table 6-7</u>. And <u>Figure 6.19</u> to Figure <u>6.21</u> present the different display options for each type of filter.

Manage Accounts Account Statement Search Transactions Search Critificates Transfer Approva PD Transaction Summary ECS-GO > Search Transactions Search Critieria Period Start 2015-10-20 Period End 2015-11-20 Period End Period End 2015-11-20 Period End 2015-11-20 Period End 2015-11-20 Period End Period End <t< th=""><th></th><th></th><th>Support</th><th>My Page</th><th>Plants</th><th>Users</th><th>Reports</th><th>EECS-GO</th><th>Home</th></t<>			Support	My Page	Plants	Users	Reports	EECS-GO	Home
Search Criteria Period Start 2015-10-20 Period End 2015-11-20 Period End Period End 2015-11-20 Period End 2015-11-20 Period End Period End 2015-11-20 Period End P		roval PD Transaction Summary	icates Transfer App	Search Certif	Transactions	Search 1	ount Statement	Accounts Acc	Manage A
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Usage Category - All - Cancellation Purpose			Cancellation Purpose	•			- All -	Usage Category	l

Search Reset

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

	Select the usage category of electricity origin Certificate Cancellation purpose from the dropdown list:
Usage Category	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 > Search Transactions

Search Criteria

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ayatını, Acco	a: Report type: Tr unt: All; Productio	on Device: All; T	nsaction Period: 2015-11 ransaction Type: ; Fuel: 11; Counter party domair	- All -; Trading So	chemes: - All		
ransaction ate	Transaction Type	Transaction Number	Account From \$	Account To ‡	Volume ‡	Status ‡	Error Code
2015-11-12 11:24:20	Internal Transfer	2015111200022	Default Account- 643002406600048294	ICICI-	1	Completed	
2015-11-12 11:04:59	Transfer	2015111200018	Default Account- 643002406600048294	R		Completed	
2015-11-06 11:19:04	Export	2015110600017	Axis-	NO- A	8	Started	
2015-11-06 10:59:23	Correction	2015110600016	NO- Ages and g	Axis-	8	Completed	25: SendingAccountID, Trader Account ID for party transferring certificates, is not a valid code (Content)
2015-11-06 10:59:23	Export	2015110600015	Axis-	NO- dada Faraji	8	Failed	25: SendingAccountID, Trader Account ID for party transferring certificates, is not a valid code (Content)
2015-11-06	Import	2015110600014	NO-	Default Account- 64300240660004829	94 4	Completed	
				NO-			
2015-11-06 10:01:43	Export	2015110600011	ICICI-		4	Started	
	Export Internal Transfer			ICICI-	42	Started Completed	
10:01:43 2015-11-06		2015110600010	Default Account-	ICICI-	42		

Figure 6.20 – Search Transactions results

2016-06-15

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)

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Account Stat Search criteria Finland; Accour	ement : Report type: ht Holder:	Transactions ove	erview; Transact	ion Period: 201 Account: All; P	Production Devic	e: All; Transact	ion Type: ;
Account Stat	ement : Report type: t Holder: : - All -; Consu ounter party: A	Transactions ove	erview; Transact All; Type of Ber	ion Period: 201 Account: All; P heficiary: All; U	Production Devic sage Category:	e: All; Transact	ion Type: ;

Figure 6.21 – Transaction Search results for Transactions overview

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count Statement									Close
Transactions Transactions overvie Transactions overvie				rnal transact		K • ©			
Account Stater	nont								
Account Stater		T	-	. T	- Deried: 20	14-02-19 To 20	14.02.19. D	Sector Fields	
Account Stater Search criteria: R Holder: Consumpt party: All	Report type:	ا و الله ا		T; Account:	: All) Producti	ion Device: All;	Transaction T	ype: ; Fuel:	; License:
Search criteria: R Holder:	Report type: tion country:	ا و الله ا	pe of	IT; Account: Beneficiary:	: All; Producti : All; Usage (ion Device: All; Category: All; C	Transaction T	ype: ; Fuel: domain: All;	; License: Counter
Search criteria: R Holder: - All -; Consumpt party: All Account Holder	Report type: tion country:	All; Typ Issued to	pe of	IT; Account: Beneficiary:	: All; Producti : All; Usage (Imported	ion Device: All; Category: All; C Transferred From	Exported	ype: ; Fuel: domain: All; Cancelled) License: Counter Total \$
Search criteria: R Holder:	Account +	All; Typ Issued to	pe of ‡ Tra To	IT; Account: Beneficiary: Insferred 🛊	All; Producti All; Usage (Imported To	ion Device: All; Category: All; C Transferred From 16745	Exported From	ype: ; Fuel: domain: All; Cancelled by	; License: Counter Total \$

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).

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

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

											Close	3		
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Transaction status:	C	omplete	be											
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rom					То									
Account Holder:	Test AH01					nt Holde	er:		test	10000				
Account:		01- 643	30024066000	00216	Accourt	nt:			_		002406600045323			
Domain:	Ireland				Domai	in:			Irela	nd				
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Figure 6.23 – Transaction Details

Table 6-8 – Transaction Details: Fiel	d Description
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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 <u>AIB Fact Sheet 18</u>
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 <u>Table 6-9</u> and <u>Figure 6.24</u>) and click **Search**.
- 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 <u>Chapter 6.8.1</u> for more details on this view
- 4. Executing the Search will display a similar view as in <u>Chapters 6.4</u> and <u>6.4.2</u> when transferring or Cancelling Certificates.

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.

Table 6-9 – Search Certificates: field description

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 <u>Chapter 6.8.1</u>

Manage Accounts Account Statement Search Cretificates Transactions Search Cretificates Search Criteria Close Close <thclose< th=""> Close Close<</thclose<>	EECS-GO > Search Criterias Search Criteria Search Criteria Certificate Info Production Sum All Tracling All Fore IE-GO Only Softem IE-GO Only IE-GO IE			ort	Suppo	My Page	Plants	Users	Reports	EECS-GO	Home
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Account Holder Info Account Name Account Name Account Account Account Account Account All - Default Account - 643002406600044371 Production Device Info PD Name GSRN PDs -All - All Owned PDs - Bug 1802PD Technology Techn	Account Holder Info Account Name Account Name Account Account All - Default Account - 643002406600044371 Production Device Info PD Name GSRN PDs - All All owned PDs - Bug1802PD Technology Technology Technology Technology To Trian PD To Trian PD To Trian PD To Trian PD To To To To Show Reports Show As									Number	Certificate
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Name Account All - All - Default Account - 643002406600044371 Production Device Info PD Name GSRN PDs All - All - All - All - All - All - Technology Technology All - Technology All - To [] - Commission Date (Note: only if the information is available for the Certificate) From [] To [] - To [] - Show Reports Show As [] - Show As [] - Post - All - All - Technology (NU) - All - Technology (NU) - All - Technology (NU) - Technology (NU) - To [] - Show As [] - Show As [] - All - All - All - All - All - All - Technology (NU) - Technology (NU) - Technology (NU) - To [] - - Show As [] - - All - - All - - All - - - - - - - - - -	Name Account All - Default Account - 643002406600044371 Production Device Info PD Name GSRN PDs All - All - Technology Technology Technology Technology Technology Technology Technology To YYY-MM-DD To YYY-MM-DD To YYY-MM-DD To Solar/Photovoltaic/Classic silicor Show Reports Show As									Holder Info	Account
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All owned PDs - Bug 1802PD Test PD035 Test PD035 Test PD035 Test PD035 To	All owned PDs - Bug1802PD Test PD035 Test PD035 Test PD035 Test PD035 To										GSRN
Bug1802PD Technology Technology Test PD035 Technology Tol0100 - Solar/Photovoltaic Commission Date (Note: only if the information is available for the Certificate) Tol0100 - Solar/Photovoltaic/Classic silicor ▼ From TYYY-MM-DD To Installed Capacity (MW) To To Show Reports Show As Show As	Bug1802PD Technology Technology Test PD035 Technology Commission Date (Note: only if the information is available for the Certificate) From YYYY-MM-DD Installed Capacity (MW) From To Show Reports		*		- All -		*				PDs
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Installed Capacity (MW) From To Show Reports Show As	Installed Capacity (MW) From To Show Reports Show As					Certificate)	ailable for the (mation is ava	only if the infor	n Date (Note: o	Commissio
From To To Show Reports	From To To Show Reports			1-DD	YYYY-MM	То			D	YYYY-MM-D	From
Show Reports	Show Reports									apacity (MW)	Installed Ca
Show As	Show As					То					From
										oorts	Show Rep
	neper									0	

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 <u>Chapter 6.4</u>

- 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.

rtificates				Close 😑								
30 Certificates found ● View by bundle ● View by PD												
View by account												
🖣 🖣 1 Page Of 1 🕨 🕅 💠	Find Next	a, • 🚯										
Bundle View:												
Account: All; Earmark Type: All; Issuing Boc Certificate Number (From - To) 🗘 Volume	dy: All; Fuel: All; Association: . •		All; Technology: All;	Technology 🗘	Earmarks 🗘	Issuing Date	Production \$	Production End	PD Name 🗘	gsrn ‡	Installed Capacity, MW	‡ License ‡
	Account	umber 🗘 Issuing Body		тозоооо -						GSRN ♀ 707052300010014037	Capacity, MW	CLicense
Certificate Number (From - To) Volume 643002406556100800000348789110 To	e ‡ Account ‡ Account Nu Name	umber + Issuing Body 06600042247 Statnett	Fuel F01050200 - Renewable/Machanica source or other/Hydro 8, marine - F01050200 F01050100 -	T030000 - Hydro-electric head installations - T030000		2013-11-27		2013-11-12			Capacity, MW 31	

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).

Home	EECS-GO	Reports	Users	Plants	My Page	Support			
Manage Ac	counts Acc	ount Statement	Search Tr	ansactions	Search Certifica	ates Transfer App	roval PD Transactio	n Summary	
EECS-GO >	PD Transaction	Summary							
Search C	Criteria								Close B
	Dates mean	Transaction D)ate [⊖] Product	on Date					
	Period Start	2015-06-10				Period End	2015-07-10		
	Account	- All -			•				
Transa	action Number								
		- All -			*		- All -		*
Tra	ading Schemes	Biogas-GO GO				Transaction Type	Cancel Certificate expiration		
		HEC-GO			-		Certificate Withdrawal		-
		- All -							
Proc	duction Device	- All owned PD	S -						
					-				
		- All -							*
	Fuel	F00000000 - U F01000000 - R							
		F01010000 - R		d					-
		- All -							*
	Technology	T010000 - Sola T010100 - Sola							
		T010101 - Sola			n				-
Counter P	Party								
Counter	r party domain	- All -			•	Counter party	- All -		T
Cancel tra	ansactions								
Consumpti	ion Period Start	YY-MM-DD			Co	nsumption Period End	YYY-MM-DD		
	Sumption	All -		٣		Beneficiary Name			
Lo	ocation of				т	ype of beneficiary	- All -	•	
b	eneficiary				'.	·· · _			
Usage	Category -	All -		٣		Cancellation Purpose			
								_	
								Search	Reset

Figure 6.26 – 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

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

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
	Select the usage category of electricity origin Certificate Cancellation purpose from the dropdown list: Support : Cancelled to receive financial support
Usage Category	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

ch Criteria							Open 🙂				
ch chtena							Open				
saction Summary Pe	r Productio	n Device					Close 🗉				
4 1 Page Of 3	> > 14 <	þ	Find Next	🖳 • 🚯							
reduction Dovic											
rounction Device	e Transac	tion Summa	iry								
roduction Device	e Transac	tion Summa	iry								
				3 40. Di E					Dend ation Dentis	All. T	
eport type: Transaction	ns; Transactio	n Period: 2014	02-19 To 2014-0						Production Device	e: All; Trans	sac
leport type: Transaction	ns; Transactio	n Period: 2014	02-19 To 2014-0						Production Device	e: All; Trans	sac
eport type: Transactior ype: ; Fuel: ; License:	ns; Transactio - All -; Consi	n Period: 2014 Imption country	02-19 To 2014-0 : All; Type of Ber	neficiary: All; Us	age Category: Al	; Counter party don	ain: All; Counter p	arty: All			
eport type: Transaction /pe: ; Fuel: ; License:	ns; Transactio	n Period: 2014 Imption country	02-19 To 2014-0 : All; Type of Ber	neficiary: All; Us				arty: All		Internal	
eport type: Transactior ype: ; Fuel: ; License; D Name \$	ns; Transactio - All -; Cons Issue \$	n Period: 2014 Imption country Transferred To	02-19 To 2014-0 : All; Type of Ber Fransferred From	Cancel \$	age Category: All Export \$; Counter party don Import \$	Correction \$	arty: All Withdrawal \$	Certificate Expiration	Internal Transfer	1
eport type: Transaction /pe: ; Fuel: ; License:	ns; Transactio - All -; Cons Issue \$	n Period: 2014 Imption country Transferred To	02-19 To 2014-0 : All; Type of Ber	neficiary: All; Us	age Category: Al	; Counter party don	ain: All; Counter p	arty: All	Certificate Expiration	Internal	1
eport type: Transaction ype: ; Fuel: ; License: D Name \$	ns; Transactio - All -; Cons Issue \$	n Period: 2014 Imption country Transferred To	02-19 To 2014-0 : All; Type of Ber • Transferred From	Cancel \$	sge Category: Al Export \$ 0	; Counter party don Import \$	Correction \$	arty: All Withdrawal \$	Certificate Expiration	Internal Transfer	1
eport type: Transaction ype: ; Fuel: ; License: D Name \$	ns; Transactio - All -; Cons Issue \$	n Period: 2014 umption country Transferred To 9 9	02-19 To 2014-0 : All; Type of Ber • Transferred From 279 0	Cancel C 0	sge Category: Al Export \$ 0	; Counter party don Import \$ 9279	correction \$	Withdrawal 0	Certificate Expiration	Internal Transfer	
leport type: Transactior ype: ; Fuel: ; License: 20 Name \$	ns; Transactio - All -; Cons Issue \$	n Period: 2014 Imption country Transferred To 9	02-19 To 2014-0 : All; Type of Ber Transferred From 279	Cancel C	ege Category: Al Export \$ 0 0	; Counter party don Import \$ 9279 12007	Correction \$ 0	Withdrawal 0 0	Certificate Expiration	Internal Transfer 0	1

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.

earch Criteria			Clos
Users	- All - Marko AH Lehtovaara Test Test Maria user Anni user		
From	2015-01-03	То	YYYY-MM-DD
Activity Category	- All - Account Management Certificate Transactions Declaration Login		



1									
Hom	ne E	ECS-GO	Reports	Users	Plants	My Page	Support		
Acti	Activity Log Issuing Statistics								
Rep	Reports > Activity Log								
Sear	Search Criteria Open ⁽³⁾								
User	r Activitie	5					Close 😑		
14	4 1	Page Of 4	Þ ÞI 💠		Find N	ext 🛃 • 🤇			
	User Acti Search criter		Activity Category: A	NI; Transaction D	Date: 2014-02-19	to 2014-03-19			
s					Date: 2014-02-19 ategory	to 2014-03-19 Descri	ption	Link	History
s	Search criter Date	ià: Users: All; /	êr	c		Descri	ption 3002406666005460 POTestBio has been deregistered	Link Details	History
s	Search criter Date 2014-03-19 :	ia:Users: All; Use	er xel Sweden	C Pl	ategory	Descri PD: 64:		Details	History

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

ie EEC	S-GO	Reports	Users	Plants	My Page Su	pport	
vity Log	Cancellatio	n Statement	s Issuin	g Statistics			
orts > Cance	llation State	ments					
arch Criteria	a						
ncellation S	tatements						
4 1	Page Of 1		þ	Find N	lext 🛃 • 🚯		
Account S Search crite Iceland; Act Fuel: ; Lice	eria: Report count Holde nse: - All -;	r: Orleumaita	n country:	; Account: All	od: 2013-01-01 To); Production Device eneficiary: All; Usa	: All; Transact	ion Status: ;
Account S Search crite Iceland; Act Fuel: ; Lice	eria: Report count Holde nse: - All -; iin: All; Cou	consumption consumption ter party: A	n country: II	; Account: All	; Production Device	: All; Transact	ion Status: ; All; Counter
Account S Search crith Iceland; Aci Fuel: ; Lice party doma	eria: Report count Holde nse: - All -; iin: All; Cou	r: Orlameite Consumptio nter party: A	in country:	: All; Type of Be	; Production Device aneficiary: All; Usa Account To \$ Default Account-	: All; Transact ge Category: A Volume \$	ion Status: ; All; Counter

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.

					his Cancellation S			
Transaction details								
Transaction Type:	c	Cancel						
Transaction Date:	2	2016-05-04 14:49:09						
Transaction Number:	2	2016050400018						
Public link to cancellation	statement:	http://cmogrexeltest.grex	el.com/Cancellati	ionStatements/Car	ncellationStateme	nt 94813 d854d2e8-		
From			То					
Account Holder:	Organizatio	on A	Name of B	Beneficiary:	<u></u>	_	_	
Account:	RS- Organi	ization A- 590000022	Cancellatio	on Purpose:	test			
Domain:	Serbia	5900000022	Consumpt	ion Period:	2016-05-04 to 2	2016-05-04		
Street:	-		Country of	f Consumption:				
Postal Code and City:	011 Belgra	de	Location o	of Beneficiary:	····	_		
Country:	Serbia		Usage Cat	tegory:	Support			
country	00.010		Type of Be	eneficiary:	Energy supplier			
Total								
Total MWh:	3							
	-							
Total GO:	3							
	3	Volume ‡ Domain ‡	Fuel, Technology	S/T ‡ Issuing Date	÷ Production Period	* installed	• Trading Schemes	Support Schemes
Total GO:	3 то) ‡ 000000383	Volume 🗘 Domain 🗘 3 Sweden			2016-01-01	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	* Schemes	
Total GO: Certificate Number (From 643002406555903110000 To	3 (-To) \$ 000000383 000000385	3 Sweden	Technology *	S/T * Date	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000	3 	3 Sweden	Technology *	S/T * Date	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device public	3 	3 Sweden	Technology *	S/T * Date	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device publi Production Device Name:	3 	3 Sweden	Technology *	S/T * Date	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device publi Production Device Name: Production Device GSRN:	3 	3 Sweden	Technology *	S/T * Date	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device public Production Device Name: Production Device GSRN: Domain of Production Device Production Device Production Device Production Period	3 	3 Sweden	Technology *	S/T * Date	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device Pabli Production Device Name: Production Device GSRN: Domain of Production De Installed Capacity, MW:	3 (-To) * 000000383 000000385 ic information	3 Sweden	Technology *	S/T * Date	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device publi Production Device Name: Production Device GSRN: Domain of Production De Installed Capacity, MW: Date of Commissioning:	3 (-To) * 000000383 000000385 ic information	3 Sweden	Technology *	S/T * Date	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device publi Production Device Name: Production Device GSRN: Domain of Production De Installed Capacity, MW: Date of Commissioning: Location of Production Device	3 (-To) * 000000383 000000385 ic information	3 Sweden	Technology *	S/T * Date	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device publi Production Device publi Production Device SGN: Domain of Production De Installed Capacity, MW: Date of Commissioning: Location of Production De Operator Name:	3 (-To) * 000000383 000000385 ic information	3 Sweden	Technology * F01010502, T051000	S 2016-02-:	2016-01-01 26 To	 Device (GSRN, installed capacity, name) 61000210001000 5000 MW 	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device Publi Production Device Publi Production Device SRN: Domain of Production De Installed Capacity, MW: Date of Commissioning: Location of Production De Operator Name: Address of Operator:	3 (-To) * 000000383 000000385 ic information	3 Sweden	Technology * F01010502, T051000	ycle	 Period 2016-01-01 To 2016-01-01 	Device (CSRN, installed capacity, name) Grouper-over- 5000 MW Houseprot	Schemes	Schemes
Total GO: Certificate Number (From 643002406555903110000 To 643002406555903110000 Production Device publi Production Device publi Production Device GSRN: Domain of Production De Installed Capacity, MW: Date of Commissioning: Location of Production De Operator Name: Address of Operator: Technology:	3 (-To) * 000000383 000000385 ic information	3 Sweden	Technology * F01010502, T051000	ycle	 Period 2016-01-01 To 2016-01-01 	Device (CSRN, installed capacity, name) Grouper-over- 5000 MW Houseprot	Schemes	Schemes

Figure 7.4 – Cancellation Statement report

7.3 Issuing Statistics

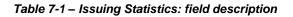
Cancellation Statement

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).

Home	EECS-GO	Reports	Users	Plants	My Page	Suppo	rt		
Activity Log	Cancellation	n Statements	Issuing St	tatistics					
Reports > Iss	suing Statistics								
Search Cri	iteria								Close
	Dates Mean	Production	Period [©] Issui	ng Date					
	Start Date	2016-05-15				End Date	2016-06-15		
	PDs	PD3 PD6 PD7 PD_t	est1		▲ ▼				
	License	Disclosure			*				
	Interval	●View by Mo ○View by we							
								Search	Reset

Figure 7.5 – Issuing Statistics



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

Reports > Issuing Statistics	Reports	>	Issuing	Statistics	
------------------------------	---------	---	---------	------------	--

Search Criteria				Open 🗉
Issuing Statistics				Close 🗉
4 4 1 Page Of 1 🕨 🕅	👂 🔄 🔤 Find Next	• 🚯		
Issuing Statistics				
Issuing Statistics				
_	2014-03-19; Production Device: All	; Trading Sche	me: GO, ICS:RE	CS; Interval: View
Production Period: 2013-11-27 To	2014-03-19; Production Device: All	; Trading Sche Year ‡	eme: GO, ICS:REC Month \$	CS; Interval: View Volume ‡

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 (<u>https://grexel.kayako.com</u>) 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).

Home	EECS-GO	Reports	Users	Plants	My Page	Support	
User Man	ual Contact U	ls					
Support >	Contact Us						
Contac	t Us Details						_
	Contact Name				*		
	Contact Phone	Select Co	ountry Code	•	*		
	Contact Email				*		
	Query Detail	*					ſ,
Note: Field	ls marked with aste	risk are manda	itory			Submit	Reset

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 <u>Figure 9.1</u>.

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.

Home	Info	Reports	Log in
Members	Plants	Transactions	Export Import
Reports > 1	Vembers		
Search (Criteria		Close B
		Dom	in All -
	A	count Holder Na	ne
	Enter	Account Number	
			form form
			Search

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
- The members can be searched by Domain or by Account Holder or Account Holder Number as seen on the <u>Figure 9.1</u>. You can define single or multiple criteria. <u>Table 9-1</u> explains the criteria.
- 3. Click Search
- 4. Details of all Organizations matching the criteria are displayed. <u>Table 9-2</u> 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.

Name	Description
	Select the Domain from the drop down list, to filter and display the Account Holders belonging to the selected Domain.
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.
	th either on the basis of the Account Holder name or Account bu select either one of the options, the other option is
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 9-1 – Account Holder 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

- 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 (<u>Table 9-3</u>). You can define one or multiple criteria.
- 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 (<u>Figure 9.3</u> and <u>Table 9-4</u>).
- 3. You can Export the details to an Excel sheet or a PDF file, by selecting the respective option and clicking the **Export** button.

Home	Info	Reports	Log in	
Members	Plants	Transaction	s Export Import	
Reports >	Plants			
Search Cr	iteria			Close 🗉
		Domain - A	II - V	
		Name		
		GSRN		
		Fuel - All	- T	
	Tecl	nnology - All	- T	
Comn	nissioning Da	te From YYYY	/-MM-DD	
Cor	mmissioning	Date To YYYY	'-MM-DD	
			Sear	ch Reset

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
	Select the Technology from the drop down list, to filter and display the Production Devices belonging to the selected Technology.
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.

t of Production Devices					Close 🗉	
4 1 Page Of 3 🕨 🔰	4	Find Next 🛛 🛃	• 📀			
Production devices						
Domain: Ireland; Fuel: All; Technol	ogy:All					
Name 🕀	GSRN ≑	Installed Capacity (MW)	Commissioning Date	🗘 Domain 🗘	Fuel	Technology 🖯
Name ⇔ Altagowlan Wind Farm	GSRN ⇔ 643002406696000619		Commissioning Date	⇔ Domain ⇔ Ireland	F01050100 - Renewable/M or other/Wind	echanical source T020001 - Wind/Onshore
		7,65	Date		F01050100 - Renewable/M or other/Wind F01050200 - Renewable/M or other/Hydro & marine	lechanical source T020001 - Wind/Onshore lechanical source T030000 - Hydropower
Altagowlan Wind Farm	643002406696000619	7,65 0,64	5 2005-11-01	Ireland	F01050100 - Renewable/M or other/Wind F01050200 - Renewable/M or other/Hydro & marine F01050100 - Renewable/M or other/Wind	echanical source T020001 - Wind/Onshore



Details of the Product	ion 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**.
- Fill in the search criteria (Figure 9.3). You can search based on Transaction Date, Production Date (<u>Table 9-5</u>).
- A bar graph and a table of the quantity of all Transactions matching your criteria is displayed (<u>Figure 9.4</u>).
 - 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.

Home	About GO	Reports	Log in			
Members	Plants Tr	ansactions	Export Import			
Statistics GC	D > Transaction:	s				
Search Cri	iteria					Close 🗉
Dates m	nean 💿 Trar	nsaction Date	Production Date			
Start [Date 2013-10)		End Date	2013-11	
Don	main - All -		~			
						Search Reset

Figure 9.4 -Transactions search criteria

Table 9-5 –	Transaction	Report s	earch criteria
	nanouvion	reporto	cui on on concona

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.

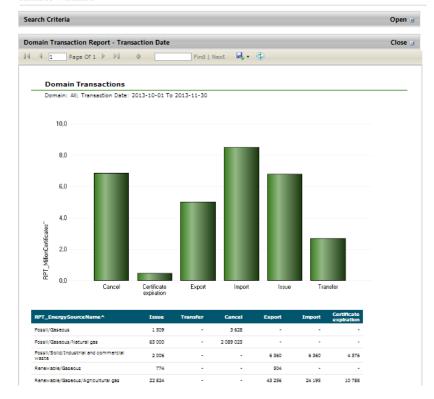




Figure 9.5 -Transaction Report

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.

ome	About GO	Reports	Log in			
embers	Plants	Transactions	Export	Import		
atistics GO	> Export					
Search Cr	iteria					
Start Da	te 2013-10	0		End	Date 2013-11	

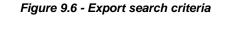




Figure 9.7 - Export search results

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.