EES USER GUIDE

For TPI (Third Party Intermediary) Users

Change History:

Version Number	Status	Date of Issue	Reason for Change
0.1	Draft	06/05/2022	Initial version for review
1.0	Issued	13/05/2022	New user guide provided for RECv3 showing changes to the EES for TPIs, linked to access to REL and CSS data.
1.1	Draft	02/03/2023	Updates following R22 Data Access Matrix implementation

Circulation:

Version Number	Reason for Issue
1.0	Finalised for RECv3 commencement on 18 Jul 2022.
1.1	

Industry Role Terminology:

The below table outlines industry roles referenced in this document where the REC definition differs.

| ECOES Role	REC Equivalent (where different)
Distributor	Distribution Network Operator (DNO)
Meter Operator (MOP)	Metering Equipment Manager (MEM) or more specifically Meter Operator Agent (MOA)

Glossary:

Term / Acronym	Meaning
TPI	Third Party Intermediary as defined in the REC
ECOES	Electricity Central Online Enquiry Service. The application that supports the Electricity Enquiry Service (EES)
EES	The Electricity Enquiry Service as defined in the REC
REL	Retail Energy Location

For the avoidance of doubt, the Electricity Enquiry Service (EES) is the name used for the service in the REC. ECOES is the system used to deliver the EES. These terms are used interchangeably in this document.

Login to ECOES

Users should open the ECOES web browser https://www.ecoes.co.uk/ and enter in their Username and Password. Then click 'Log on'.

All users of ECOES must agree to the Terms of Usage of the system upon each session login. When logging in, users will be presented with a session login screen that requires them to positively confirm that they agree to the Terms of Usage of ECOES (as defined and visible when clicking on the blue 'ECOES Terms of Usage'.
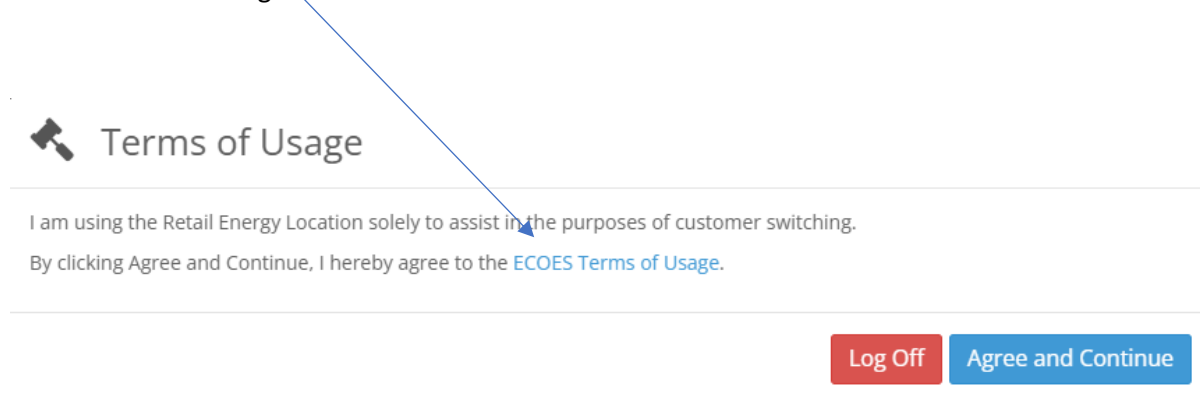
The User will have the option at this point, to log off (if they disagree with the terms of use) or agree and continue (if they agree to the terms of use).

Opting to agree and continue indicates that the user is accessing ECOES for the purpose of aiding customer switching and is therefore entitled to view REL data items and access the REL searching functionality.

Forgotten Password

If a user forgets their login password then they must reset it themselves, or where they do not have permission to do so, request that service from a person with appropriate permissions within their organisation. It is not the role of the ECOES Technical Service Desk or the REC Code Manager to reset passwords.

1.1   Resetting another user's password

A user with either the 'User Maintenance' or 'Reset Passwords and Delete Users' system function can reset another user's password. This can be performed by going to the Admin menu then selecting Users. When you have searched for and selected the required user, there is a button that says Reset Password.

1.2   Resetting your own password

Below are several scenarios in which a user requires their password reset and the methods they can employ to do this:

Email Address Users

- A user has forgotten their password.

A user can initiate a password reset via the login screen by clicking on the 'Forgot your password?' link. On completion an email will be sent to their email address containing a link allowing them to enter a new password.

- A user knows their password but would like to reset it anyway.

A user can initiate a password reset via the 'Change Password' button on the 'My Account' screen. On clicking 'Change Password' button an email will be sent to their email address containing a link allowing them to enter a new password.

- A user's password has expired.

Should a user's password expire between them logging out and next logging in, a popup will be displayed the next time they log in with their expired password. On clicking the 'Reset Password' button an email will be sent to their email address containing a link allowing them to enter a new password.

Traditional Username Users

- A user has forgotten their password.

A user can initiate a password reset via the login screen by clicking on the 'Forgot your password?' link. On clicking the link, a popup is displayed whereby the user must correctly answer their memorable questions. If answered correctly a user may reset their password.

- A user knows their password but would like to reset it anyway.

A user can initiate a password reset via the 'Change Password' button on the 'My Account' screen. In order to change their password via this screen they must know their current password.

- A user's password has expired.

On logging in the user will be informed of the password expiry and prompted to enter a new password.

Proxy Email Address Users

- A user has forgotten their password

The user can initiate a password reset from the login screen, in this instance an email containing a new password will be sent to the proxy email address saved against that user. The password can then be communicated to the intended user outside of the ECOES system.

- A user knows their password but would like to reset it anyway

The user can request a password reset from the 'My Account' screen. This will send an email to assigned proxy email address containing a new password. The password can then be communicated to the user outside of the ECOES system.

- A user's password has expired

On logging in the user will be informed of the password expiry and prompted to enter a new password.

Primary Search

Search/Homepage – clicking this will take the user back to the ECOES Homepage.

My Settings – this dropdown will allow the user to access their display settings – find out more here.

My Details – this dropdown will allow the user to access their account details – find out more here.
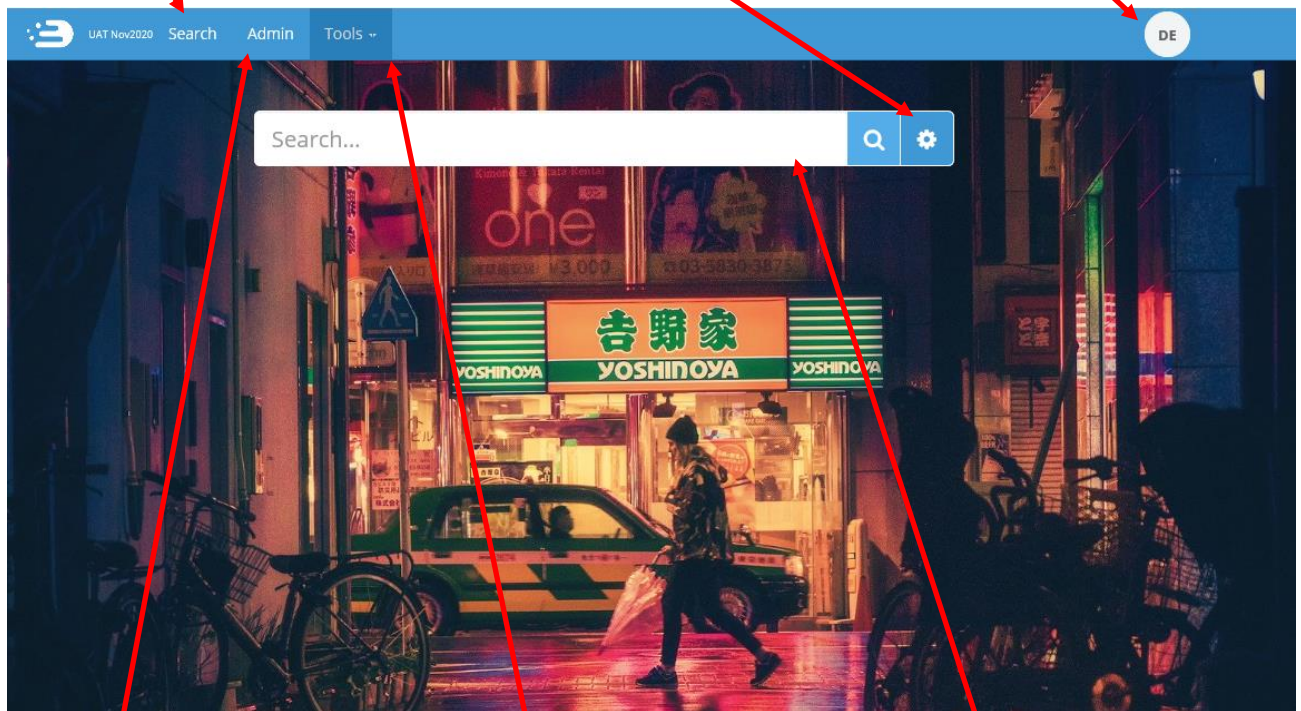
Admin – this screen will show details of the users' company group (e.g. who the MAU is). Users who have user management privileges will be able to reset passwords and create users from this page.

Tools – Allows Users with relevant permissions to access User Reports.

Search field: in ECOES this is a 'Universal Search' function (similar to internet search engines). Users will be able to search for addresses, partial addresses, postcodes, MPANs, MSNs, multiple MPANs, multiple addresses or a combination.

Search results are limited to 200 results; if a search exceeds this the user will be required to refine their search.

By default, all users will be limited to a maximum of 600 searches per day. Once this limit is reached, access to view data will be removed for the remainder of that day. This limit will be configurable at company group level.

When searching, there are two possible address sources that can be queried – Meter Point Location (MPL) addresses and Retail Energy Location (REL) addresses.

If a search term includes an MPAN or MSN, only MPL address data will be queried and returned.

If a search term consists of postcodes and address fragments only, both MPL and REL address data will be queried and returned.

A user can indicate that they are not searching to aid with customer switching, and do not wish for REL address data to be queried, by toggling the Using For Switching control, as detailed in this document under Display Settings.

When searching both MPL and REL address data, ECOES will combine the results of each query. If an address search matches on an MPL address but not a REL Address, the REL Addresses will be returned for all MPANs within the MPL match. Likewise, if an address search matches on REL Addresses only, the MPL address for the matched MPANs will also be returned.

MPL Search Result Display

When querying only against MPL address data, results will be displayed as below. An individual record is returned for each MPAN, consisting of a top row containing the MPL address and a second row containing MPAN data.

39 MPL Address Line, CITY, ABC 123			💡 🏠 _F
MPAN: 0123456789123	GSP Group: _F (Northern)	Status: Traded	Distributor: Power Distribution

MPL & REL Search Result Display

When querying both MPL and REL address data, results will be displayed as below. Results are still grouped by MPAN, with a top row displaying the MPL address and a second row containing MPAN data, but additional rows will be present beneath this listing the REL Addresses for that MPAN.

Though an MPAN will only have one MPL address it may have 0, 1 or multiple REL Addresses.

1 MPL ADDRESS LINE, CITY, ABC 123			💡 🏠 _F
MPAN: 0123456789123	GSP Group: _F (Northern)	Status: Traded	Distributor: Power Distribution
REL: 1 REL ADDRESS LINE, CITY, ABC 123	Address Type: DPA	Confidence Score: 100	UPRN: 0000000000801

If the 'Display REL Addresses' control is turned off, the REL Address information will not be displayed within the users search results.

Property Display Options

| ✓	Detail View	📅
	Simple View	📅
✓	Display REL Addresses	

Below is an example of a search result with the Display REL Addresses control unticked.

39 MPL Address Line, CITY, ABC 123		📍 💡 🏠 _F 📍
MPAN: 0123456789123	GSP Group: _F (Northern)	Status: Traded	Distributor: Power Distribution

With Display REL Addresses unticked, a user can still view the REL address information for an individual search result by clicking the Get REL Address button within the search result. Clicking this button will display the REL data for that MPAN only.
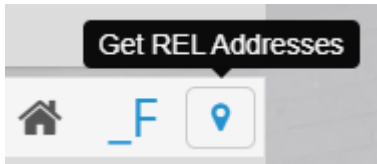
If an MPAN has been returned due to a match on a REL address, but did not match on the MPL address, this will be highlighted by the green map marker icon.
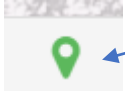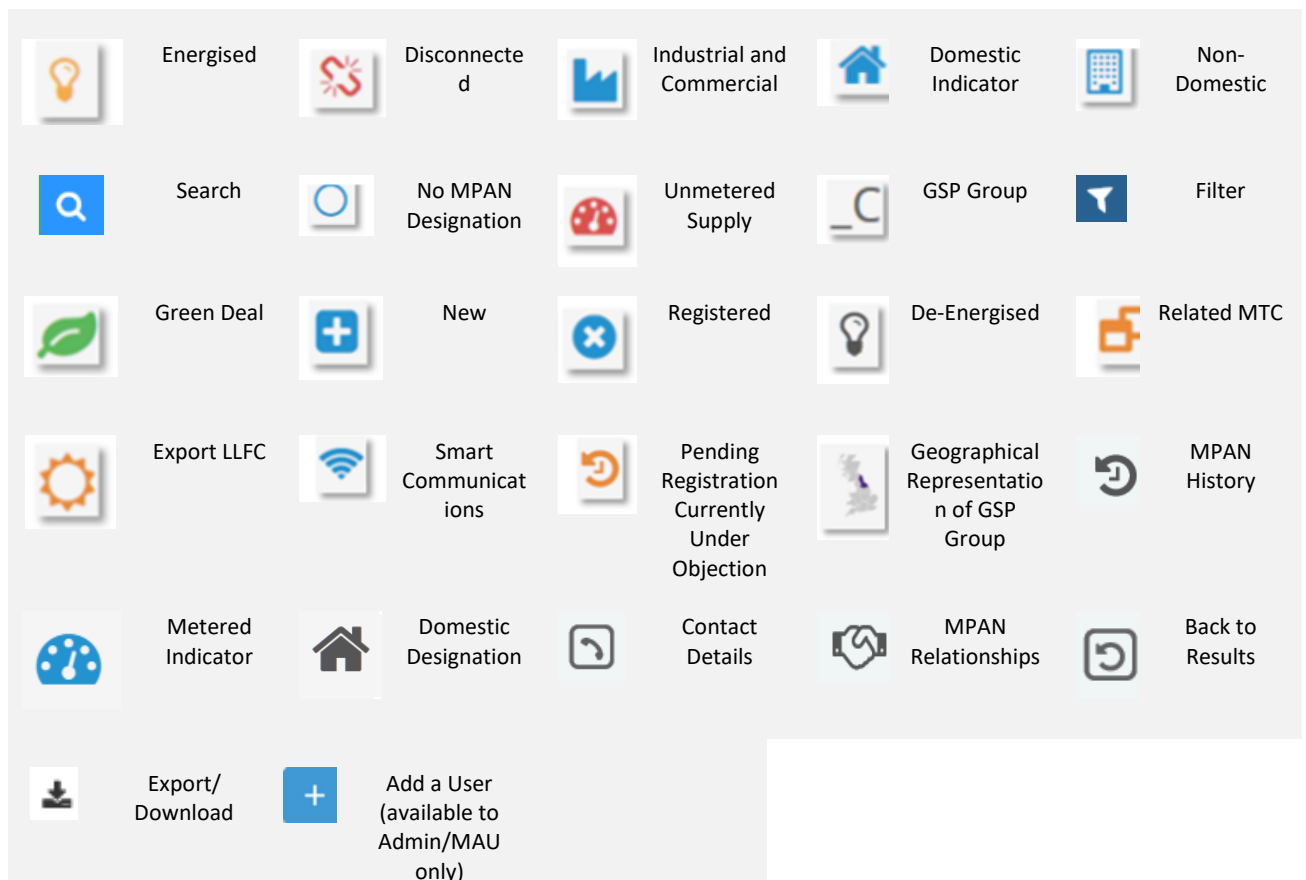

My Account

Users can manage their user account details via the 'My Account' page found by hovering their mouse over the circular icon in the top right of the ECOES page. This is also where a user can logout. A user can perform the following tasks in this page:

- Amend Account Information
- Reset their password
- Amend their memorable questions/answers for password resets.

- View remaining MPAN Views for that day
- Change the background colour of ECOES

Icon Identification:

Icon	Label	Icon	Label	Icon	Label	Icon	Label	Icon	Label
	Energised		Disconnected		Industrial and Commercial		Domestic Indicator		Non-Domestic
	Search		No MPAN Designation		Unmetered Supply		GSP Group		Filter
	Green Deal		New		Registered		De-Energised		Related MTC
	Export LLFC		Smart Communications		Pending Registration Currently Under Objection		Geographical Representation of GSP Group		MPAN History
	Metered Indicator		Domestic Designation		Contact Details		MPAN Relationships		Back to Results
	Export/ Download		Add a User (available to Admin/MAU only)							

Market Sector Indicators

When viewing an MPANs, an indicator will be present to reflect the Market Sector of that MPAN (as defined in the Icon Identification above.) In the example below, the MPAN is domestic and energised.
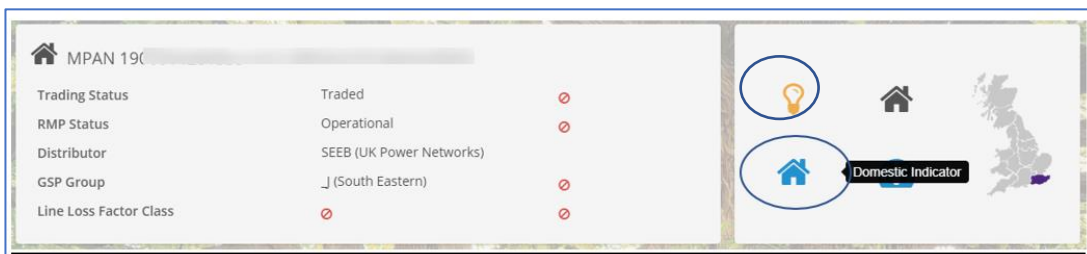
Display Settings

A user can choose how they view data within ECOES. To open the settings options, click on the settings icon, found to the right of search box (⚙).

You can choose where 'Postcards' are positioned, whether to hide postcards, or to allow the postcard to 'flip' or not - a flipping postcard will show additional information when a mouse is hovered over it. A user can choose to remove 'random background' which is also pre-set.

A user can also decide whether to see a 'Detailed' or 'Simple' view - the simple view will remove the dates related to some Data Items allowing more information to be shown on one screen without having to scroll.

A user can indicate whether they are searching to aid with customer switching by toggling the Using For Switching control. When ticked, an address search will query REL address data. When unticked, an address search will query MPL address data only.

A search that queries REL data will display both REL addresses and the MPL addresses on the search results screen. If a user does not wish for the REL addresses to be displayed, they can untick the Display REL Addresses control.

A search containing an MPAN or MSN will not query REL data and will never display REL address data on the search results screen, regardless of the Display REL Addresses setting.

Managing Email Domains – Only available to the MAU

Email domains are a security feature for ECOES organisations to ensure only valid Username/Email Addresses are used. An organisation can have **multiple email domains or none**. Whenever a new user is being created, and the organisation has a domain(s) setup, the username will only be able to have a valid email domain.

Managing Users – Only available to relevant users (MAU and User Admin roles)

Clicking on the Users option on the left of the Admin page will show users with relevant privileges all the users within their organisation. This is also where 'User' Reports can be found.
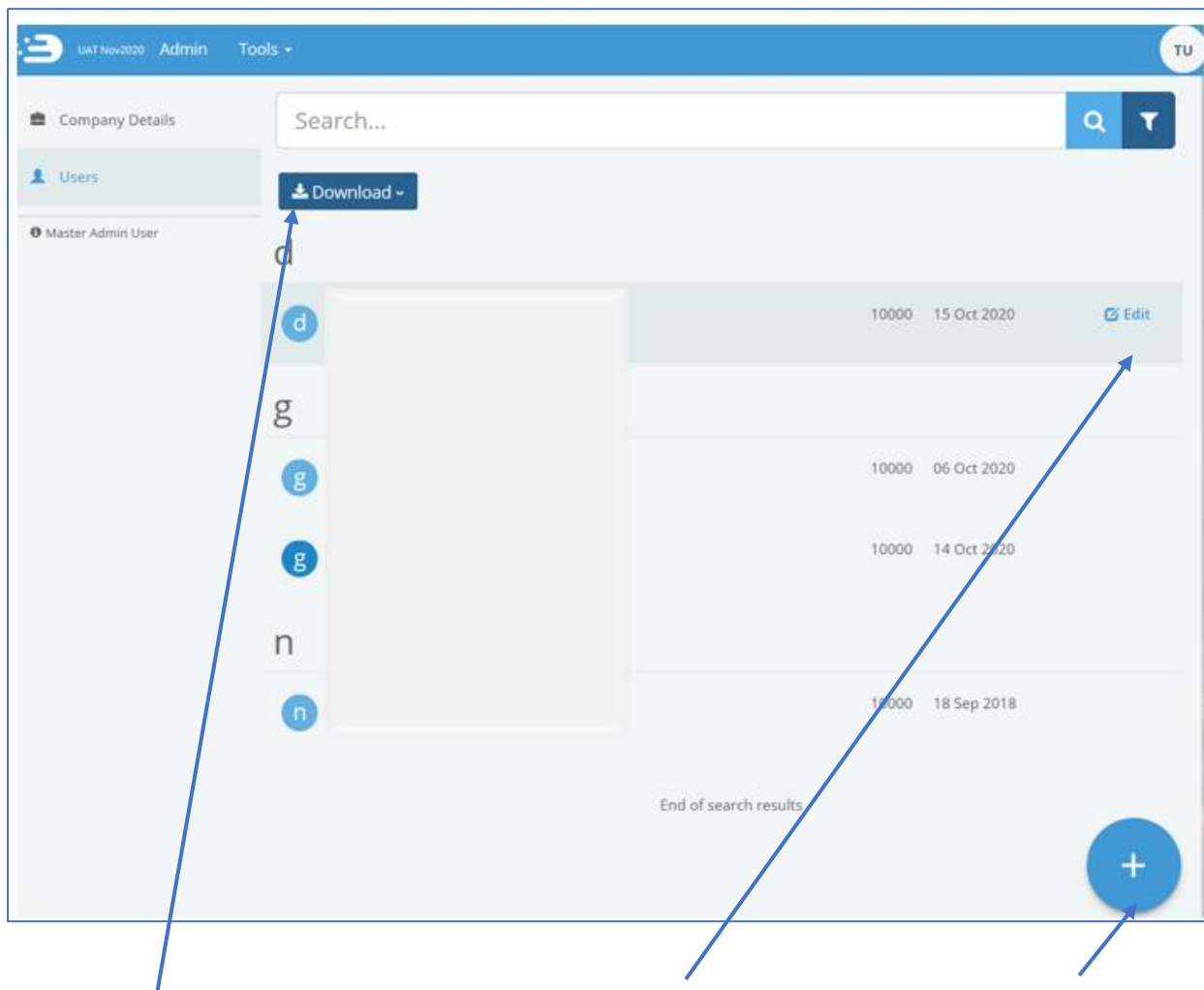

Clicking 'Download' will allow MAU and Admin users to download all the users of a company group into a report containing user details e.g. last login date.

Clicking on the 'Edit' button when hovering over a specific user will open the user's profile. The MAU can unlock user accounts, reset a user's password, delete a user, amend user account information grant, or revoke access to certain ECOES permissions.

To create a new user, click on the 'Plus' icon. This will open a blank user profile, identical to the way that edit user is displayed.

Amending User Roles

Users with the relevant privileges (MAU and User Admin Roles) can amend what functions other users within their company group have access to. To do this open a user account within https://www.ecoes.co.uk/Admin/User by clicking on 'Edit' within that users line.
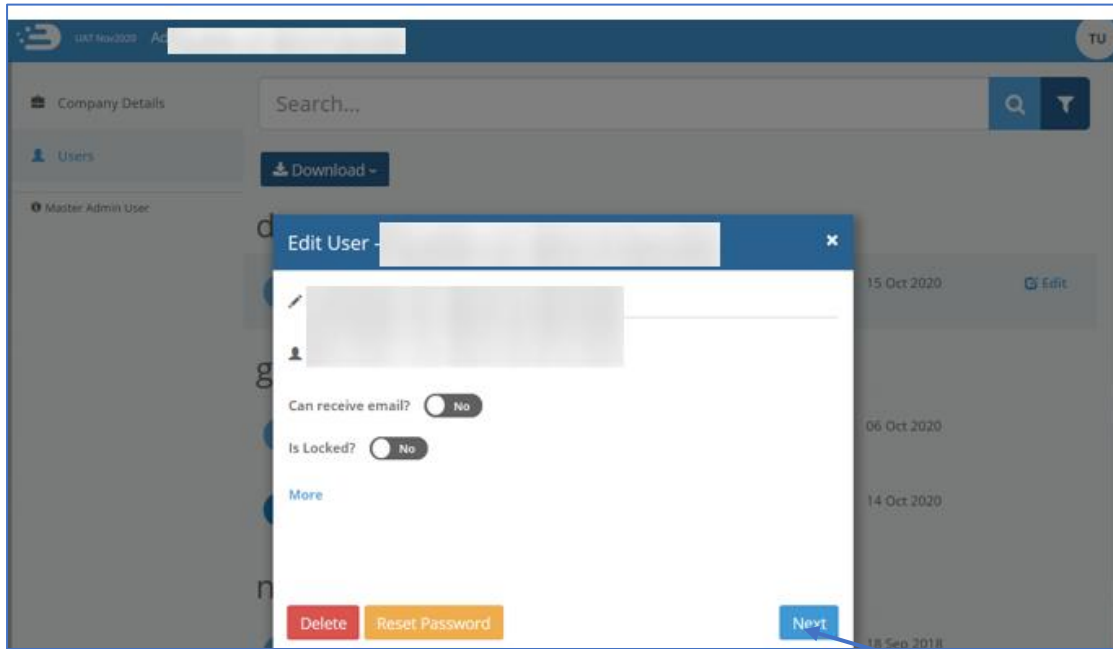
To view and amend what system functions a user has access to click on the 'Next' button.

This page lists what functions are available to each user. Here you can tick/untick as applicable. A blue highlight indicates functions that have been selected.
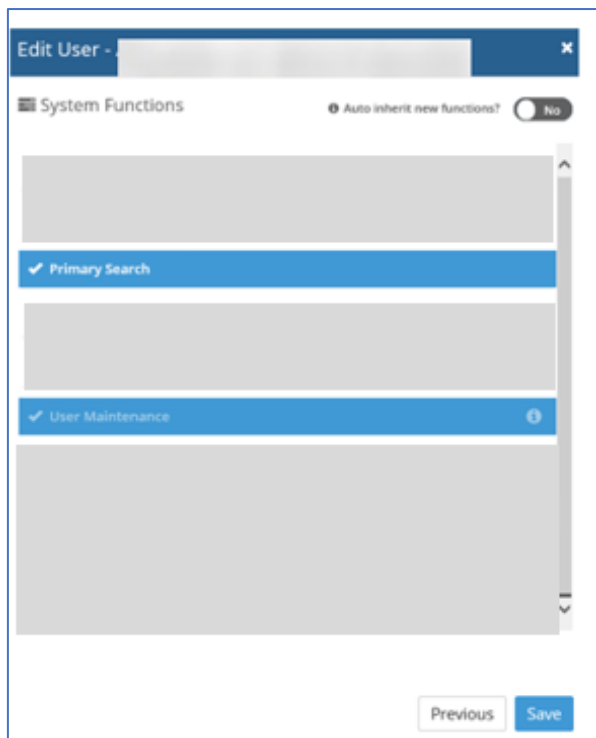
Once you click 'save', you will return to the main 'Users' page and a pop up on the bottom right of the page will confirm that this user's system functions have been saved.

Transferring MAU to another user

1. The user you are wishing to transfer the MAU privilege to must already have a user account and:
   - have a valid email address as their username.
   - must have a phone number populated (found in the 'more' section).
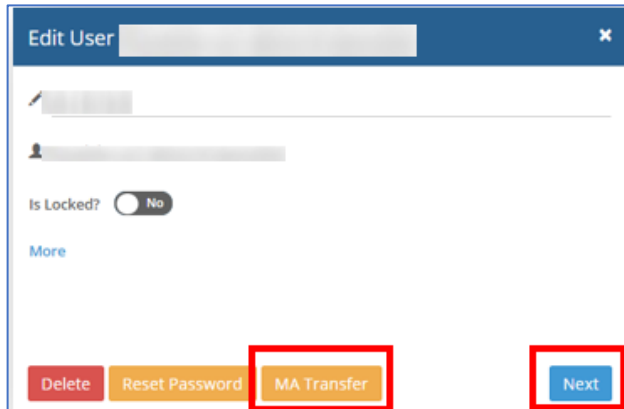
If the new MAU does not have one of the above the MA Transfer button/option will not be shown.

You must add these details and 'save' the user account, when re-opening the user account, the MA Transfer button/option will be shown.

2. Click the MA Transfer Button, this will open a pop-up, asking you to confirm or cancel the change.
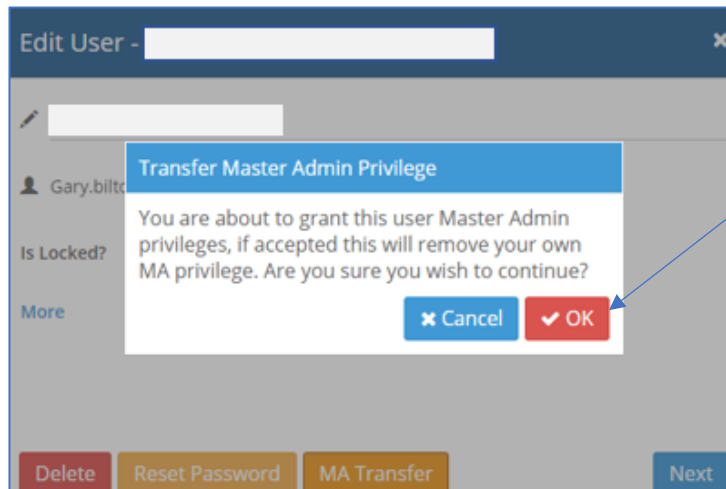
Clicking OK will generate an email to the prospective MAU.

3. The prospective MAU must click on the link in the email which will take them to the login screen. Once logged in they will see a MAU Transfer request on their 'My Details' page, within 'My Account'.

User Reports

Two reports are available to download for users with relevant privileges. They can request reports regarding the behaviour of their users, these reports will only be available to be download once logged into the system.

All available reports can be found within 'Tools' drop down and the 'User Reports' functionality can be accessed by clicking on.

This function allows MAUs of a company group, and those with access to User Reports to generate two User reports detailing meter search details for all the users within their company group, reports are delivered in CSV format.

Once you click on Download, a pop up will advise you to please wait for the report to run. If a report is not available for your chosen timeframe, the system will notify you like so.
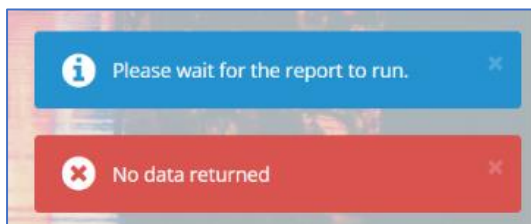
If a report exists, a pop up will ask you if you wish to open, save, or cancel the report download.

1. User summary report

The Summary report lists details for each user that has made searches in a user configurable time period, where an MPAN has been selected. The report shall display all the user details as in the User Detail Report, but only display totals instead of information about the specific reports.
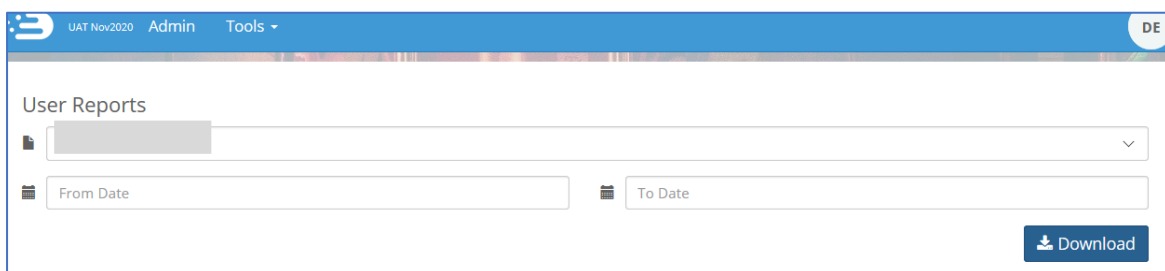
2. User details report

The User Details report lists all MPAN Searches that have been performed during a certain period of time. The search can be for a specific user (by entering a username in the search parameters), or if no username is entered, for an entire company group.

As this report lists all MPAN searches we would recommend restricting the time periods when doing reports for a company group.

It shall provide the following information:

- Supplier and address of the MPAN viewed.

- User detail information such as the e-mail address, phone number and fax number, place of work for both the user and the line manager. (If these are filled in by the users' administrator).


Refining Results

MPAN search results can be further refined by using either the plus and minus icons, or the lightning bolt icon, as described below.
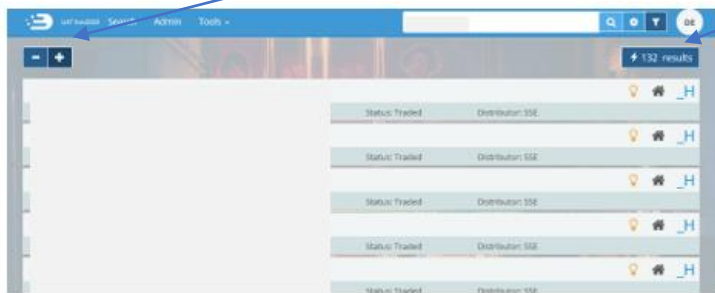
Some searches return more results than expected.

The plus and minus buttons at the top left of the results screen will provide a detailed view when plus is selected (as in the screenshot) or a minimal view when minus is selected.

For an advanced search, click on the lightning bolt icon (top right of results screen) to expand the more detailed search criteria box. Then you can free type in any extra details and click on search.
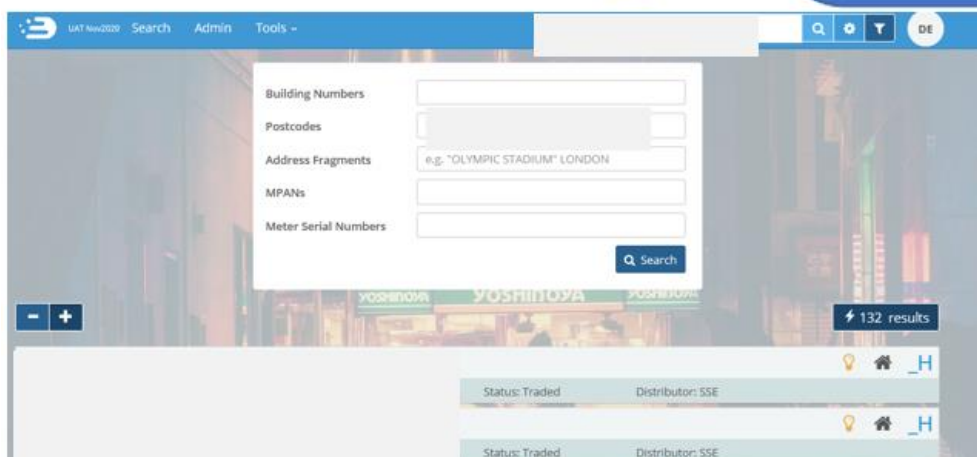
Filtering Results

To include/exclude certain MPAN attributes from the search results, you can click the 'Filter' icon (▼) to the right of the search bar which will expand the filter options.

The filter icon will move side-to-side to indicate that a filter is applied.

If you navigate away from the current search page (e.g. back to the homepage or to your account details page), the filter settings will be reset to include all attributes.

If your filter excludes all results, ECOES will advise you with the following pop up.

Postcards/Postcard flipper

Searching by postcode will usually result in 'Postcards' being visible within the MPAN record. Postcards (highlighted in the red box below) are designed to allow users to quickly view another search result without needing to navigate back to the results page.
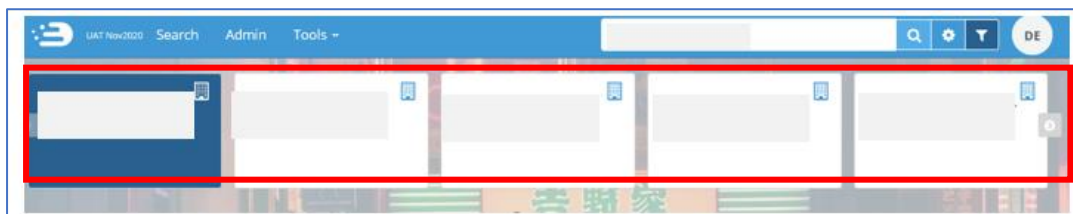
The number of postcards depends on how many search results you had; if your original search yielded 4 results then there will be 4 postcards that can be scrolled through. If your search yielded 1 result, then no postcards will be pesent.

Hovering over a Postcard will rotate it to display MPAN, GSP Group, Status and Distributor. Clicking on a postcard will open that MPAN page.

The 'no entry' sign indicates that those specific Data Items are restricted. You will not be able to view these items.

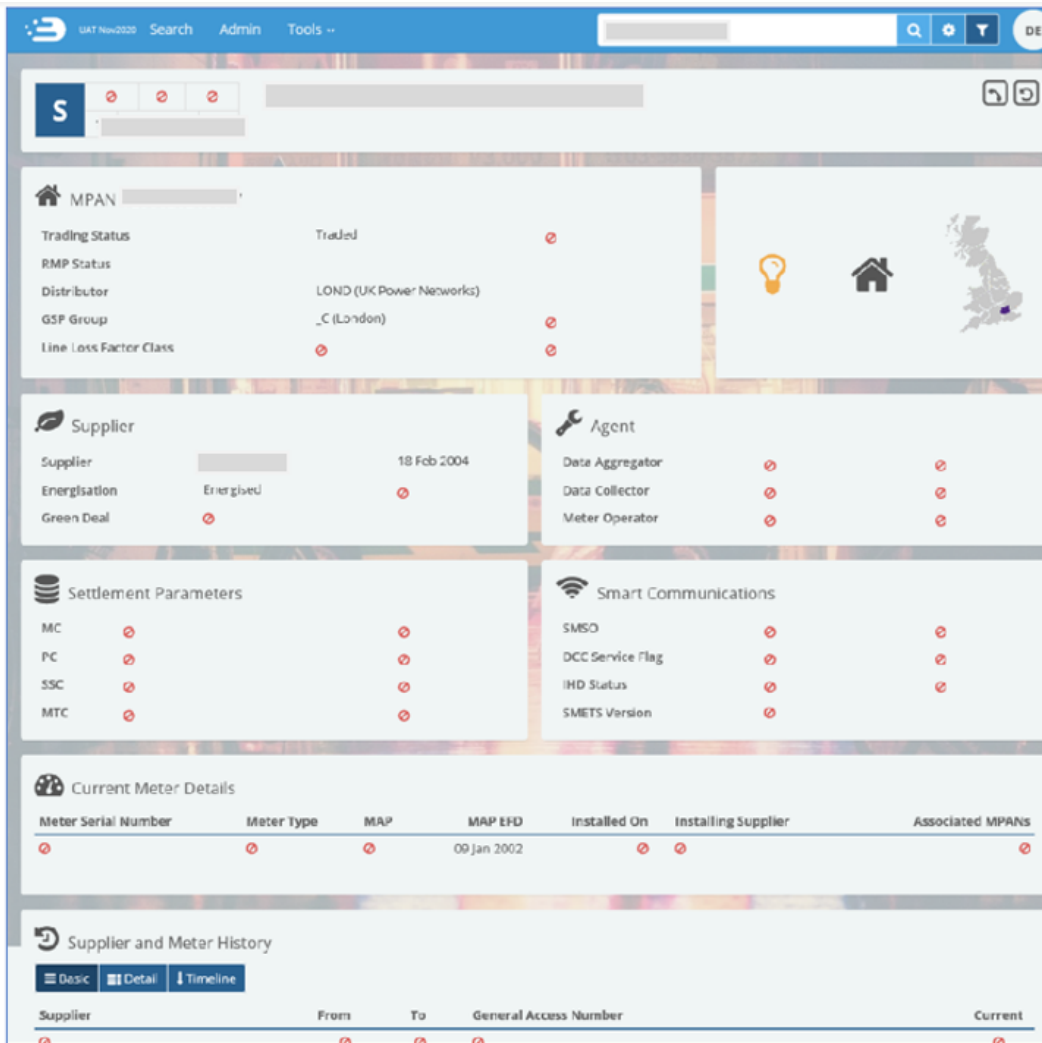Hover the cursor over the 'Supply' icon to show date the data was last updated and by whom.

Click the contact button to open a pop-up containing the contact details of Distributor and MPAS associated with the MPAN.

Click the 'Back' icon to take you back to the main search results.

At the lower part of the MPAN detail page, users with access are able to view additional information regarding the MPAN, such as:

- Current and historical Meter details
- MOP and Supplier history, and
- Links and details relating to to assocaited MPANs (if any).

MPAN Details CSS Data

Where a TPI has been granted access to CSS data under the REC, consent to viewing this data is given when selecting Agree and Continue from the Terms of Use confirmation dialog box when logging on to ECOES.

ECOES will expose the attributes associated to the CSS synchronisation message.

The current supplier and supply start date are taken from the latest successful, complete Registration Secured Active Synchronisation or Registration Event Synchronisation message. If no such message can be found, the current supplier and supply start date are taken from the MPRS data.

If the current supplier data from the latest CSS message does not match the current supplier data from ERDS, ECOES will highlight this with a red info icon (as shown in the screen grab below), the

tooltip of which explains that a CSS switch has recently been confirmed. The user can view the latest CSS switch data in the CSS Switching Summary panel (described in the next section).
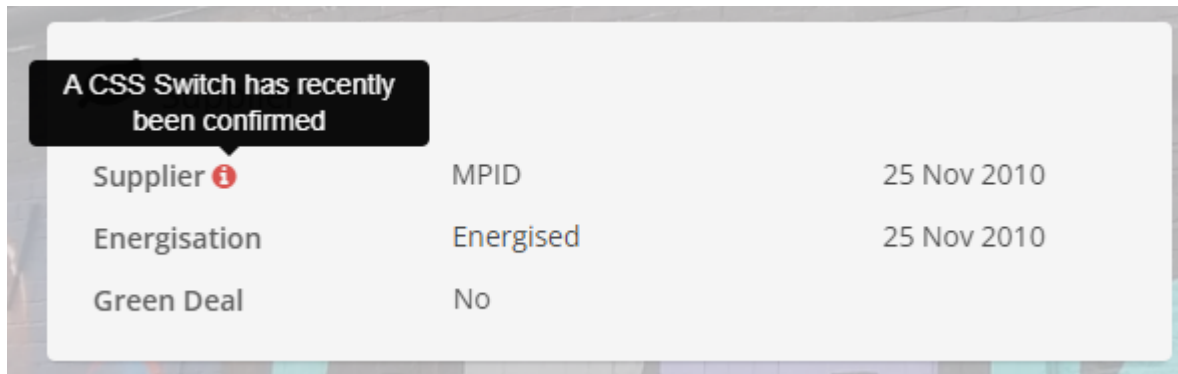
The Icon reflects the status of the Domestic Premises Indicator at the last Registration Secured Active or Registration Event Synchronisation message received for the associated MPAN. If no such message exists, the value is derived from the MPAN Profile and Measurement Class.

Where the Domestic Premise indicator is set to 'True' the house icon will be blue

Where the Domestic Premise indicator is set to 'False' the house icon will be grey

CSS Switching Summary

The CSS Switching Summary parameter of the MPAN details screen will reflect the status of the latest CSS Switching Synchronisation message received by ECOES.

The following message types are eligible for display within the CSS Switching Summary panel:

- Registration Cancelled Synchronisation
- Registration Event Synchronisation
- Registration Pending Synchronisation
- Registration Secured Active Synchronisation
- Retail Energy Location Synchronisation

The Information will remain available in the CSS Switching Summary section until a new message supersedes it.
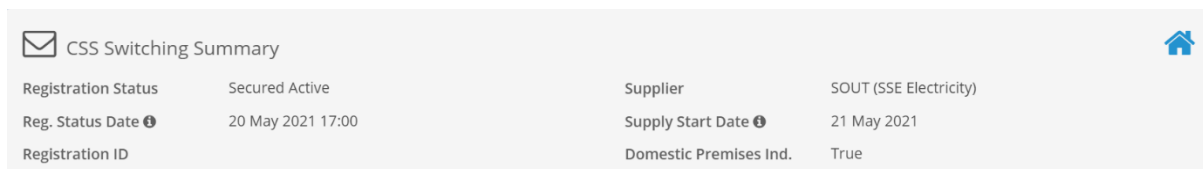
CSS Switching Messages

The CSS Switching Messages parameter of the MPAN details screen displays all CSS messages received for the associated MPAN within the last 90 calendar days. Once the 90-day threshold has been reached, the message will no longer be displayed within the CSS Switching Messages panel.

Event Date	Reg. Status ❶	Reg. Status Date	Supplier	Dom. Ind.	Reg. ID ❶
20 May 2021 17:01	Secured Inactive	20 May 2021 17:00			
20 May 2021 17:00	Secured Active	20 May 2021 17:00		🏠	
19 May 2021 18:40	Pending	19 May 2021 18:40		🏠	

Cancelled Registration Synchronisation Messages

Once a Cancelled Registration Synchronisation Message has been received the CSS Switching Messages and CSS Switching Summary parameters will display the Cancelled Synchronisation message.

However, the Supplier and Meter History parameter of ECOES will remain mastered and updated through MPRS data. In cases where a cancelled registration has taken place, the following Registration Notes will be displayed once the batch associated with the MPAN has been processed:

Retail Energy Location Details

From the MPAN details screen, a user can access the REL data for the associated MPAN. The REL data can be access through the map marker icon in the top panel of the screen:
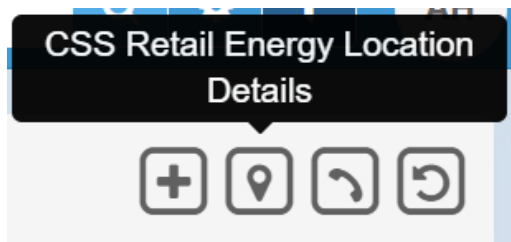
Clicking the CSS Retail Energy Location Details button will open a popup window displaying the latest REL data as provided within the latest CSS Retail Energy Location Address Synchronisation message.
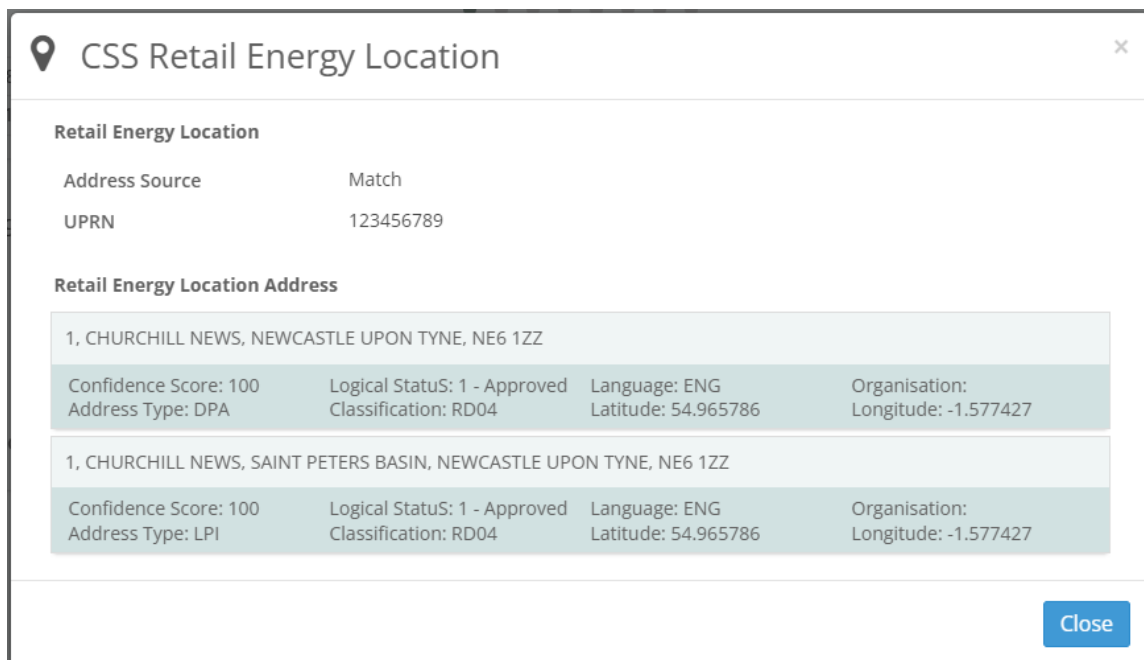

MPAN Search and Details View – Data Access Matrix (DAM)

Data Item Restrictions

Access to individual data items is determined by the category to which a company group is assigned. Each category represents a role within the RECCo Data Access Matrix (DAM). The Data Access Matrix defines which data items are available to which roles, e.g. a Supplier may have access to the GSP Group data item, but a Virtual Lead Party may not.

The full RECCo Data Access Matrix can be accessed through the EMAR/REC Portal.

The ECOES website applies data item restrictions to both the primary search result screen and MPAN details screen. Restrictions are implemented by obscuring the data item value with a 'no entry' icon, as seen below.
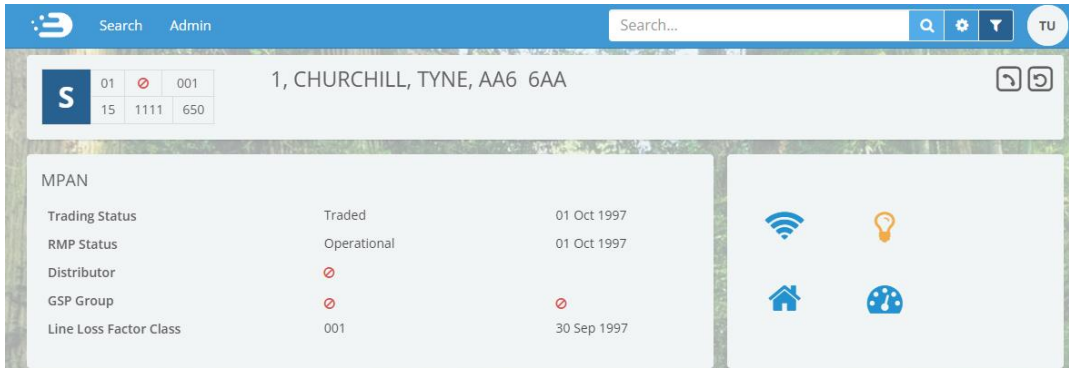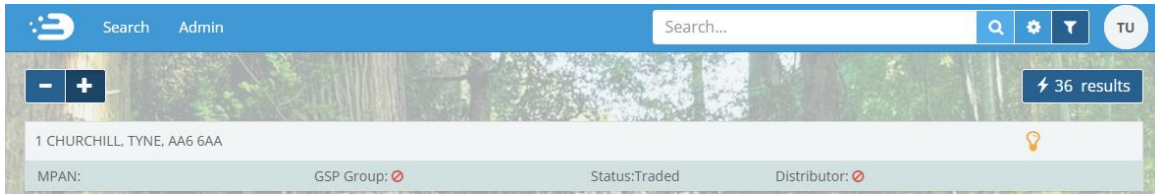
Search Result Restrictions

Search result restrictions are defined at a company group level. These restrictions limit the results that can be returned by the primary search functionality. For example, a company group may be restricted to search results for MPANs with a Profile Class of '0'. These restrictions are determined by the access agreements agreed between RECCo and individual participants.

Terms And Conditions Agreement

On logging into the system, all users will be presented with a session login screen that requires them to positively confirm that they agree to the Terms of Usage of ECOES. A Supplier user will have to flag whether they have legitimate reason for viewing a specific MPAN, by agreeing to the Terms of Usage (as per page 3 of this document). Once done, they will be able to enter the ECOES website with the appropriate access for their Company Group.