



**M-RETS**

**M-RETS Change Request Form**

Project Issue Request ID: 0005	Requested by: Kari Clark Xcel	Type of Change: Enhancement	Date Requested:  Priority:
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**Title:**  
Certificate Subaccount Report (r=601)

**Description:**

- 1) **Add Search Functionality**  
Certificate in Sub Account reports The “goto” button is helpful but the user still has to guess what page of the report a specific generator is located on.
- 2) **Add other criteria to make certificate selection**  
It would be extremely helpful if there was a method in M-RETS so that certificates to be retired or transferred were automatically selected, based on given parameters such as volumes, vintage, fuel type, generator(s), First and Last etc.  
The user would then have a chance to review the certificates selected, and make changes if needed, before submission for retirement or transfer. This would also be beneficial to use for the WI RRC process.

**APX Response:**  
**There are two options to implement this request.**

- 1) Fully automating the selection of a specific quantity of certificates based on selected criteria. This requires creating a new search screen with new criteria such as oldest or newest certificates first and quantity. Allow batch transfer from selection results. Add ‘Select All’ (new feature on the Batch Transfer screen) to mark all check-boxes
- 2) Implement search function (magnifying glass) to filter by multiple parameters. Then allow Account holder to use ‘Select All’ (new feature on the Batch Transfer screen) to mark all check-boxes and adjust certificate quantities.

**Reason for Change:**



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<b>Deliverables:</b>	
1) Add/test new search functionality for Certificate Subaccount Report ( <b>r=601</b> ) 2) Create interface in report (r=601) to select batches meeting selected criteria	
<b>Risk &amp; Issues Involved:</b>	
Thorough testing will need to be conducted to ensure proper functionality.	
<b>External Impacts:</b>	
No Known Issues.	
<b>Attachments/References:</b>	
<b>APX Only:</b>	
<b>Estimate for Scheduled Release:</b>	
<b>Option 1: Fully automating the selection of a specific quantity of certificates based on selected criteria</b>	
Development	45 Hours
System Test, Regression Test and UAT	8 Hours
<b>Option 2: Implement search functionality to Allow manual selection of Certificate Vintage (Magnifying Glass)</b>	
Development	10 Hours
System Test, Regression Test and UAT	4 Hours
<b>Cost Impact:</b> Per contract, will be implemented on a Time & Material basis, at \$149.10/hour.	
<b>Total Cost Estimate:</b>	
	Option 1 \$7902.30 (53 Hours)
	Option 2 \$2087.40 (14 Hours)



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*Approvals*

APX: Joe Varnas

Date:

[M-RETS Inc.]:

Date:

Notes: