

NEW WREGIS Platform

Phase 1 Features Checklist

Updated July 13, 2026

Features Planned for the Phase 1 Software Launch

The features with green checkmarks in front of them are **substantially/materially complete**. This means the core feature/component function works, tasks can be completed, some bugs exist, and cosmetic issues or non-essential features may still need work.

The functionality required for Phase 1 contains 103 unique features across several categories and is intended to replicate the core functionality that exists in the current system. The summary below provides a high-level overview.

User Interface

- Simplified user interface.
- Navigate displayed data via tables.
- Filter on all fields in all tables.
- Download tables via browser without size restrictions or forced emails.

Logins and Security

- ✓ **Reset passwords.**
- ✓ **Protect login credentials via multi-factor authentication.**
- ✓ **Create new users within an organization.**
- ✓ **Update user privileges and profiles.**
- ✓ **Sign-on once to login to any organization with permissions.**

API Integrations

- Perform all basic customer functions via API.
- Perform all basic Qualified Reporting Entity (QRE) functions via API.

Organization Registration

- Register new Customer, QRE, and Program Administrator organizations.
- ✓ **Update organization contact and billing information.**

Generators

- ✓ **Register generators using more intuitive and clear requirements.**
- ✓ **Update information for previously approved generators.**
- ✓ **Upload generator documentation.**

- Create and maintain Aggregated Meter Groups (AMG).
- ✓ **Assign a QRE for generation data reporting.**
- Track certificate remainders history by fuel type.
- ✓ **Add multiple fuel types to generators.**

Distributed Generation (DG) Groups

- Register new DG groups and units using the user interface (UI).
- Upload DG Group documentation.
- Upload unit-specific documentation.
- Update group and unit information.
- Assign a QRE for generation data reporting.
- Track certificate remainders history by group.

Accounts

- ✓ **Create new retirement, reserve, and active accounts within organizations.**
- View summary data by account.
- View detailed certificate information by account.
- Associate a retirement account with a program invitation.

Generation Data

- Report generation data using the UI or file upload (kWh and MWh units).
- Enter meter and fuel allocations.
- View a log of generation activity within the organization.
- Review pending generation lines with available actions and accept or dispute multiple lines at once.
- Perform feasibility validations on generation data with fewer entries incorrectly flagged.
- View and download generation data files that have been uploaded.
- Validate generation data and enable error messaging.
- Adjust generation: Optimization to reduce deductions from future vintages in cases of generation data over-reporting.
- View previously entered fuel and meter allocation information.

Programs and Eligibility

- Add eligibility information to generators and DG groups to create a clearer interface and no redundant fields.
- Update or deactivate eligibility information for generators and DG groups.
- Manage multiple eligibility codes within a single organization.
- Create and edit "Programs."
- Invite participants to "Programs."

e-Tags

- Import e-Tags from OATI based on Purchasing Selling Entity (PSE) code.
- View e-Tags within the organization.
- Match e-Tags to certificates using the UI or file upload.
- Un-match e-Tags from active certificates.
- View a log of e-Tag activity.

Certificates and Transfers

- Transfer certificates between active accounts within the organization with no line limits.
- Transfer certificates between active organizations and accept multiple transactions at once with no line limits.
- Retire certificates with no line limits.
- Reserve certificates with no line limits.
- Withdraw recurring transfers.
- Transfer mass (internal and external) certificates via file upload.

Reporting

- Submit report export requests for compliance purposes.
- View previously submitted report export requests.

Additional Features Planned in Phase 2

Phase 2 identifies an additional 38 features as summarized below. Stakeholders will be consulted during Phase 2 Research, Design, and Planning (RDP) to ensure goals are aligned. The Phase 2 RDP activities will begin immediately upon the completion of Phase 1.

- Upload file(s) with DG Group units.
- Upload file(s) with meter and fuel allocations.
- Transfer generators in-system.
- Request Retirement withdrawals in-system.
- Produce real-time public reports.
- Upload file(s) to add and update eligibility information on generators.
- Perform all basic Program Administrator functions via API.
- Create permission profiles for applying user permissions to large groups of users.
- Set custom default values for meter and fuel allocations.
- Enable user notifications.
- Register thermal generators.
- Report on thermal generation.
- Issue certificates for thermal generation.

These phases are just the beginning. Enhanced platform functionality beyond the existing system is part of the ongoing software development. Subsequent enhancements will deliver additional functionality that responds to the ongoing needs of customers in a dynamic industry.