

# CT Green Bank Monitoring Associated Accounts – Application Note

## Introduction

PV sites registered and managed in the SolarEdge monitoring platform can be accessed and monitored by CT Green Bank, by utilizing the Associated Accounts feature. Site administrators can grant access permission to CT Green Bank at any time and control access rights for any site. Granting access to CT Green Bank is required to enroll a customer in automatic revenue grade meter reporting to CT Green Bank. For further information about the Associated Accounts feature, refer to the [Monitoring Associated Accounts Application Note](#).

**NOTE**

Only account Administrators can request to connect as an Associated Account.

## File Transfer Protocol (FTP) Reporting

SolarEdge offers a reporting service to CT Green Bank with the purchase of a SolarEdge inverter with an integrated C.12.20 revenue grade meter and a SolarEdge 3G cellular modem. Once per day SolarEdge provides a File Transfer Protocol (FTP) file, which summarizes energy production data for select systems during the previous 24 hours, to Locus Energy on behalf of CT Green Bank. Customer sites, which Site Administrators grant access permission to CT Green Bank, are included in this daily FTP file. Additional enrollments or approvals with or from either Locus Energy or CT Green Bank are the responsibility of the customer.

## Configuring an Associated Account with CT Green Bank

This procedure is required only for your first CT Green Bank – SolarEdge system configuration. If you have previously added CT Green Bank as an Associated Account, skip to step 4 under the *Managing Associated Accounts* section.

### ► To add CT Green Bank as an associated account:

- 1 In the monitoring platform home page, under your user name, click **My account**. The account window is displayed.
- 2 Select the Associated Accounts tab.

The screenshot displays the SolarEdge monitoring platform interface. At the top left is the SolarEdge logo. To the right, there is a 'Home' link and a 'Welcome' message with a dropdown arrow. Below this is a navigation bar with icons for 'Sites', 'Accounts', 'Reports', and 'Support'. A notification banner states 'New features added! Click to learn more'. Below the navigation bar is a tabbed interface with tabs for 'Company Details', 'Storage Profiles', 'Users', 'Associated Accounts' (which is selected), 'Module Models', and 'Inverter Model'. The 'Associated Accounts' tab is active, showing a section titled 'Associated Accounts Access' with a description: 'Add an associated account to enable site sharing, for example with investors/financiers, O&M providers, sub-contractors etc. You control which sites are shared and what level of access is granted.' A '+ Add Associated Account' button is located to the right of the description.

Figure 1: Associated Accounts tab

3 Click **+Add Associated Account**. The dialog shown is displayed.

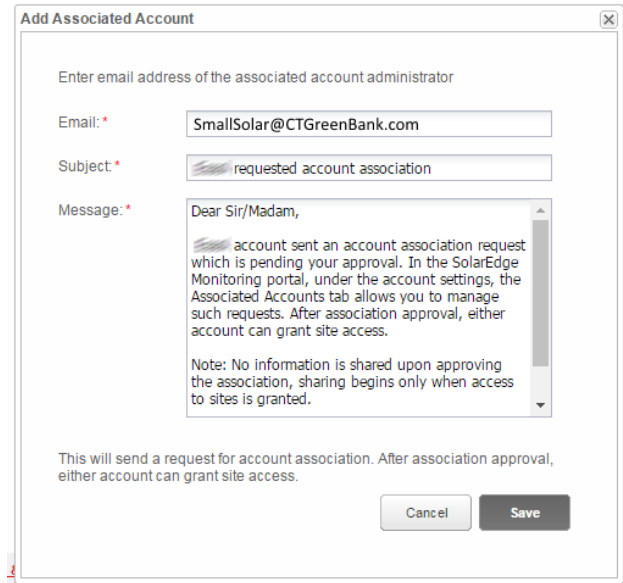


Figure 2: Add an Associated Account

- 4 Enter the email address **SmallSolar@CTGreenBank.com** to grant access rights.
- 5 You can modify the email subject, and the message text, as required.
- 6 Click **Save**. The Associated Account invitation will be sent via email and will wait for CT Green Bank to approve it.

## Managing Associated Accounts

With the request approved, the administrator can configure the appropriate sites access and level.

### ► To manage associated accounts:

- 1 In the Associated Account section, click the Connecticut Green Bank link. The Associated Account Details window is displayed.

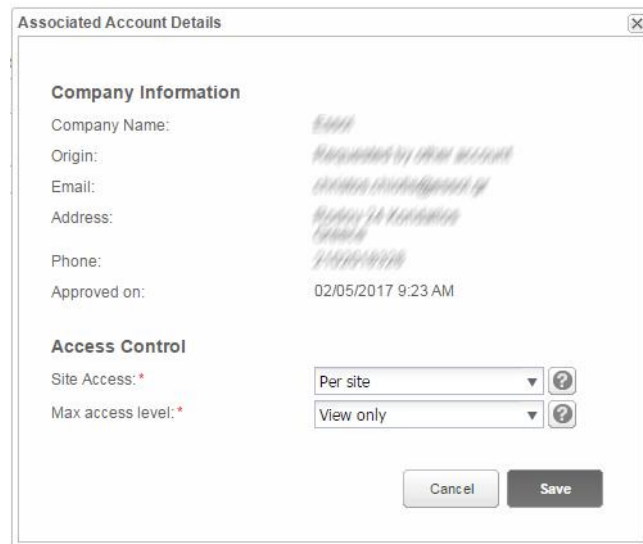


Figure 3: Associated Account Details

- 2 In the **Access Control** section, select the applicable control options as described in the table below:

Access Control	Option	Description	Comments
Site access policy	Per-Site	Grant the other party access to a selected site(s).	Different access levels can be selected for each site.
Access level limit	View only	Other party can only view the site(s) monitoring information.	

- 3 Click **Save**. An email will be sent to notify CT Green Bank when site access is granted or revoked.
- 4 Click on the **Sites** tab. From the site list, select the site name of the customer to grant access to CT Green Bank.
- 5 Click **Admin**.
- 6 Select the Associated Accounts tab.

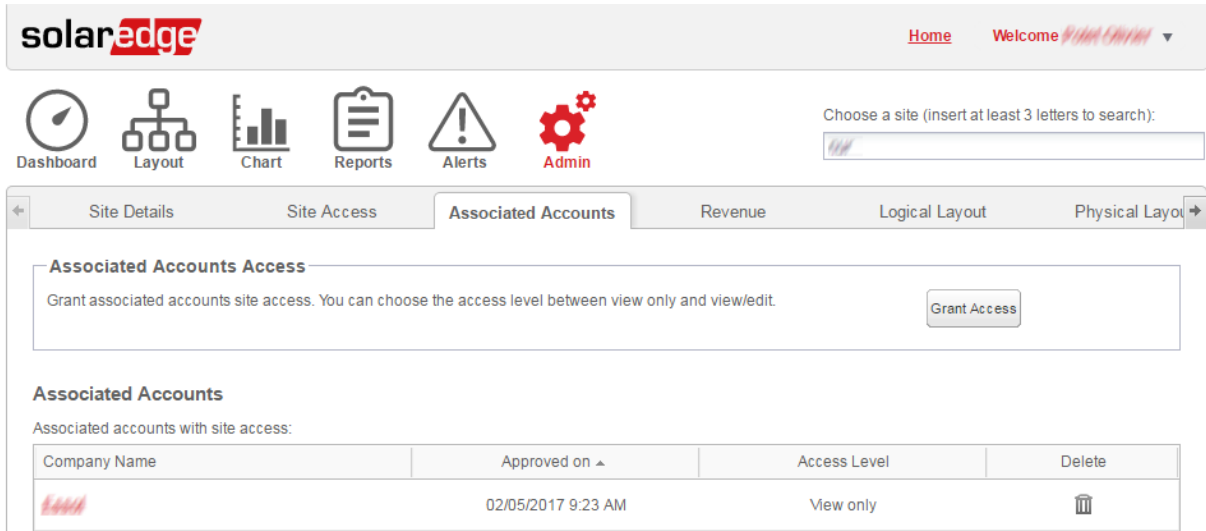


Figure 4: Granting Access Alert

- 7 In the *Associated Accounts Access* section, click **Grant Access**. The following screen is displayed.

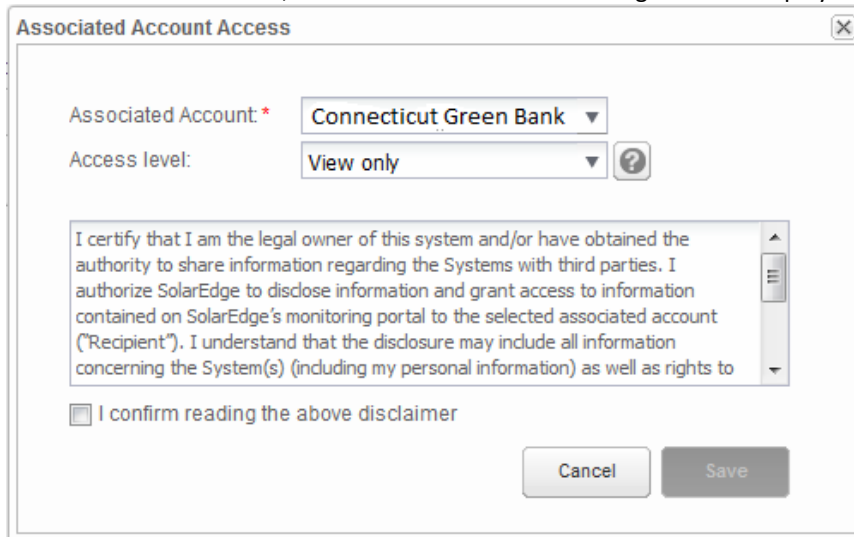


Figure 5: Grant Access Legal Disclaimer

- 8 Select **Connecticut Green Bank** in the drop down menu, and the access level (if applicable). Read the legal information and mark the confirmation check-box.
- 9 Click **Save**. An email is sent to CT Green Bank.

## Identifying the SolarEdge Site ID

CT Green Bank requires all customers to provide the SolarEdge Site ID in Power Clerk. To identify the Site ID, select the customer site and click the Dashboard icon.

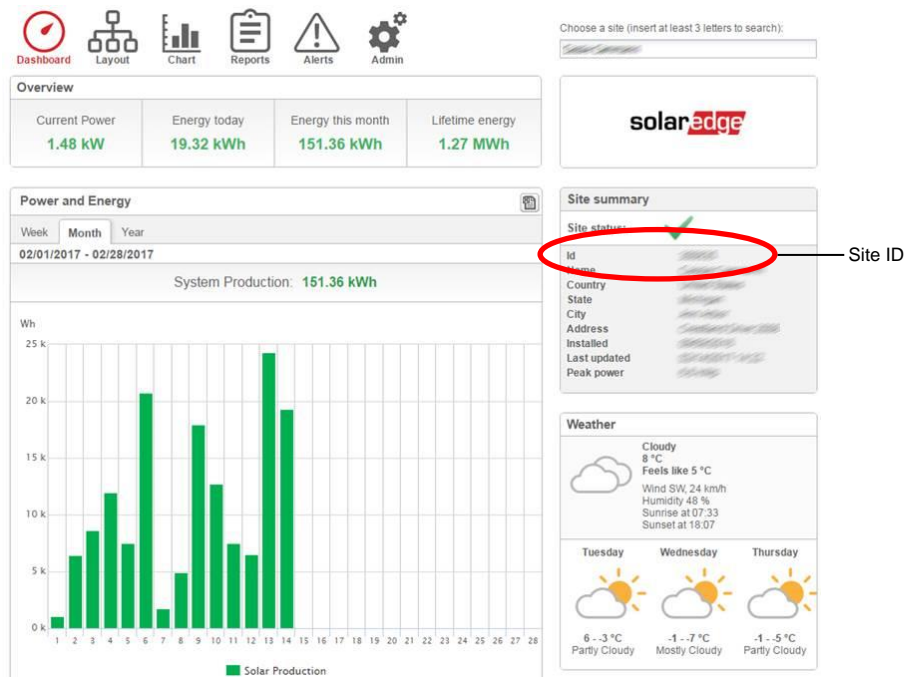


Figure 6: Identifying the SolarEdge Site ID