

The logo features the word "Orsis" in a bold, black, sans-serif font. The letter "O" is stylized with a white center and is surrounded by seven curved bars in shades of orange, red, and yellow, resembling a sun. Below the "Orsis" text are five small green circles, and a single green leaf is positioned above the letter "i".

**Orsis**  
know your energy  
**User Manual**

**Orsis**

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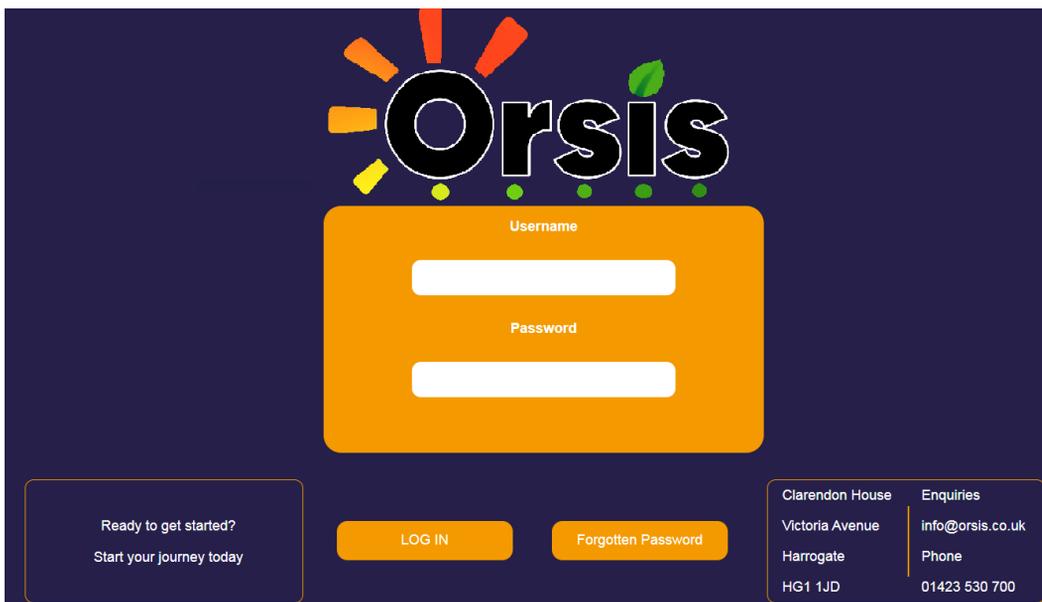
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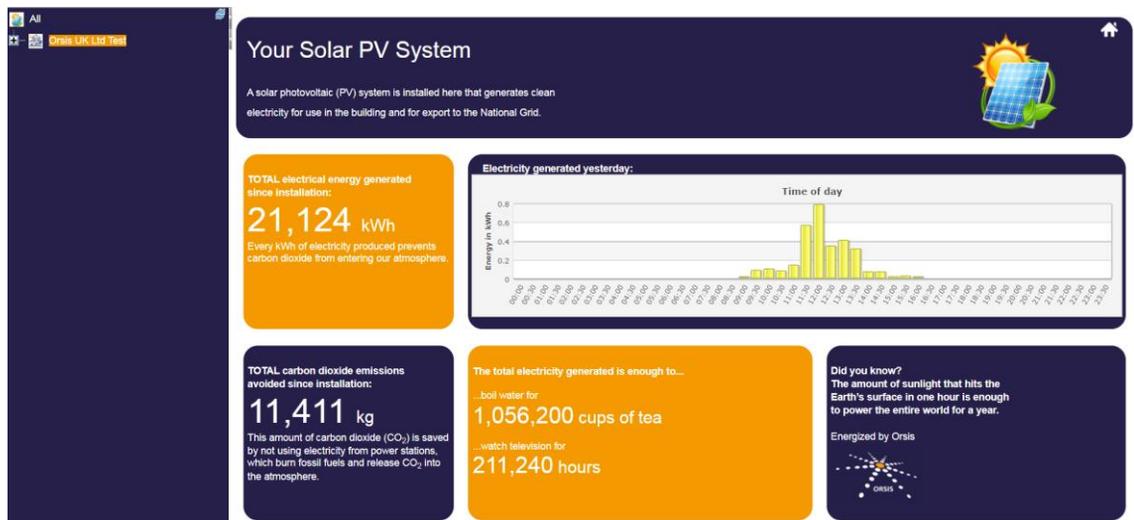
## 1. Logging in

Log in at [www.sunrise-portal.com](http://www.sunrise-portal.com) you will need to enter your username and password as provided by Orsis.

A screenshot of the Orsis login page. The page has a dark blue background. At the top center is the Orsis logo, which consists of the word "Orsis" in a white, rounded font, with a stylized sunburst above the 'O' and a green leaf above the 's'. Below the logo is a large orange rounded rectangle containing two white input fields. The top field is labeled "Username" and the bottom field is labeled "Password". Below the input fields are two orange buttons: "LOG IN" and "Forgotten Password". In the bottom left corner, there is a white rounded rectangle with the text "Ready to get started? Start your journey today". In the bottom right corner, there is a white rounded rectangle containing contact information: "Clarendon House", "Victoria Avenue", "Harrogate", "HG1 1JD" on the left, and "Enquiries", "info@orsis.co.uk", "Phone", "01423 530 700" on the right.

## 2. Dashboard

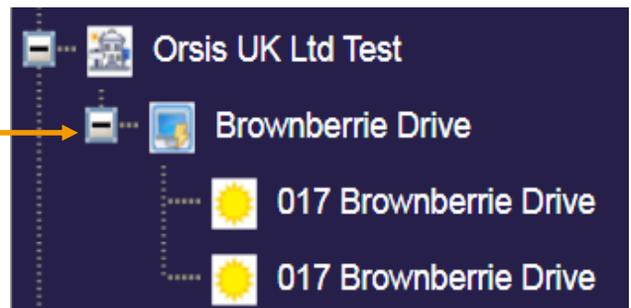
After logging in you will see the Dashboard:



- **Navigation Tree**

On the left side of the screen you can see the installations.

Click the second node button to expand the navigation tree to display all branches.



The left button at the top of the navigation tree  will refresh the contents of the view and collapse all branches.

- **TV Page**

When on the Dashboard page as above, you can toggle between the Home Page and the TV Page.

Click the home button when you are on the TV Page to return to the Home Page. 

Or on the Home Page by pressing the TV Page button. 

From the Home Page you can navigate to all parts of the portal.

• Home Page

You can view the specific half hourly generation data.  
You will need to select the installation you wish to view.

The screenshot shows a dashboard with the following elements:

- Meter serial number:** 3512090007
- Current reading:** 13887.513
- Select Date:** A dropdown menu.
- Generations/Tariffs:** Radio buttons to toggle between 'Generations' (selected) and 'Tariffs'.
- Chart:** A bar chart showing 'Unit: kWh' over a 24-hour period. The y-axis ranges from 0 to 1.6. The x-axis shows time slots from 00:00 to 23:30. A legend indicates 'CURRENT' (blue bars) and 'AVERAGE' (red line).
- Summary Cards:**
  - Feed in Tariff:** Earnings to Date (£343.30), Earnings this month (£0.00), Earnings this week (£0.00), From install date.
  - CO<sub>2</sub> Saved:** Saved to date (7,504.95 Kg), Saved this month (6.69 Kg), Saved this week (0.56 Kg), Saved on (0.00 Kg).
  - Weather today:** 3°C, Light Rain, Mist, Humidity:0.1, Wind:NNE at 20 mph.
- Filters:** Daily, Monthly, Yearly, Property.

Callouts from the image point to:

- Meter serial number** (pointing to 3512090007)
- Current reading** (pointing to 13887.513)
- The half hourly data** (pointing to the chart)
- FiT earnings & current FiT rate** (pointing to the Feed in Tariff card)
- CO<sub>2</sub> saved** (pointing to the CO<sub>2</sub> Saved card)
- Weather today** (pointing to the Weather today card)

To view historical data, click 'select date', a drop down calendar box will appear.

The screenshot shows the 'Select Date:' dropdown menu open, displaying a calendar for March 2020. The date '14-03-2020' is selected in the dropdown. The calendar grid shows days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates from 1 to 31.

Select the date to view and the calendar will disappear.

Click **Daily** to view the selected date.

The same can be done for **Monthly** and **Yearly**

From here you can also view the FiT earned for specific dates by selecting tariffs.

Generations  Tariffs

### 3. Report

- **Meter Read Report**

Hover over Report, 'Meter Read Report'



Select the required report

<b>Daily</b>	Date From: 01-01-2020	To: 29-02-2020	Type: Solar PV
<b>Monthly</b>	Month From: 01-2020	To: 03-2020	Type: Solar PV
<b>Quarterly</b>	Start Month: Jan	Year: 2020	Type: Solar PV

This shows the following information

RGS ID	FIT ID	MCS No	Address	Post Code
Meter Serial Number	Read Period	Read Type	Meter Read	Date

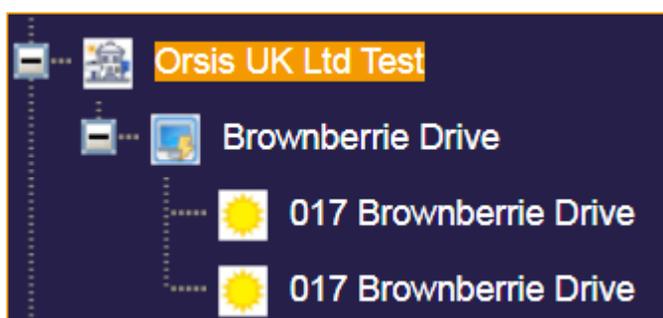
Click **Generate** which will display the comparative days data, you can export into Excel, click **Download**

- **Tariff/CO2 Report**

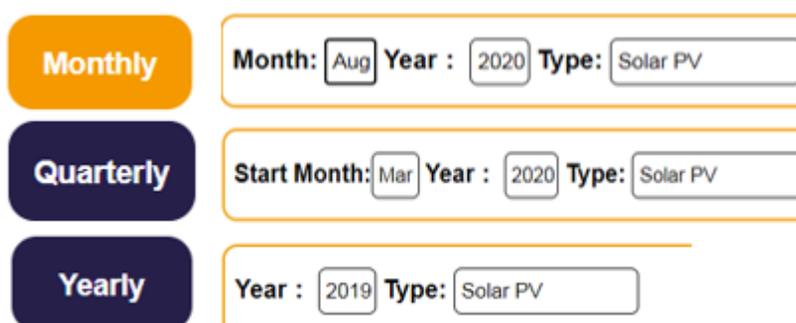
Hover over Report, 'Tariff/CO2 Report'



To run report for the entire portfolio, please ensure the top node is orange.



Select the required report



A screenshot of a report selection form. It has three radio buttons: 'Monthly' (selected and highlighted in orange), 'Quarterly', and 'Yearly'. To the right of each radio button is a form field for parameters. For 'Monthly', the fields are 'Month: Aug', 'Year: 2020', and 'Type: Solar PV'. For 'Quarterly', the fields are 'Start Month: Mar', 'Year: 2020', and 'Type: Solar PV'. For 'Yearly', the fields are 'Year: 2019' and 'Type: Solar PV'.

This shows the following information

FIT ID	Address	Post Code	Meter Serial Number	Total Generation(kWh)
Total Tariff(Pounds)	All Saved C02(Kg)	Max Saved C02(Kg)	Min Saved C02(Kg)	Avg Saved C02(Kg)

Click [Generate](#) which will display the comparative days data, you can export into Excel, click [Download](#)

- **Half Hourly (HH) Reading Report**

Hover over report, 'HH Reading Report'



Then select the dates 'from' and 'to'

**Report - HH Meter Read Report**

Date From:  To:

Click [Generate](#) which will display the comparative days data, you can export into Excel, click [Download](#)

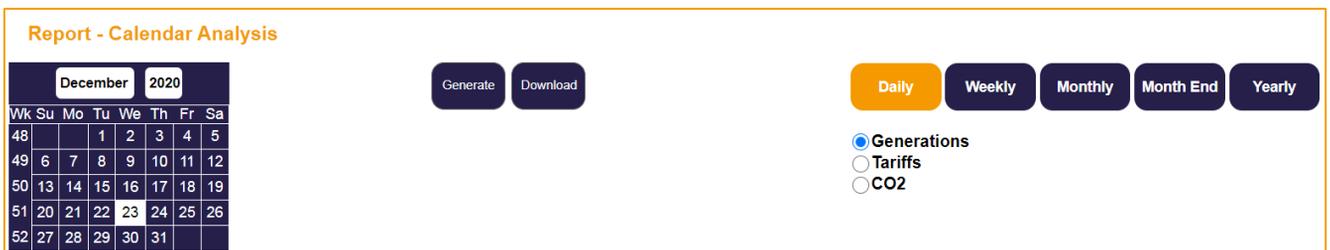
**PLEASE NOTE THE MAXIMUM DATE RANGE IS 3 MONTHS**

- **Calendar Analysis**

Hover over Report, 'Calendar Analysis'.



The portal allows you to analyse historical data for each installation to determine performance against your own benchmarks.



You are then able to search on a number of variables.

- Generation**
- Tariffs**
- CO2**

And select different report types



When selecting

**Daily**

Click the day and it will turn orange.

		August		2020			
Wk	Su	Mo	Tu	We	Th	Fr	Sa
30							1
31	2	3	4	5	6	7	8
32	9	10	11	12	13	14	15
33	16	17	18	19	20	21	22
34	23	24	25	26	27	28	29
35	30	31					

To select multiple days, click on the days.

		August		2020			
Wk	Su	Mo	Tu	We	Th	Fr	Sa
30							1
31	2	3	4	5	6	7	8
32	9	10	11	12	13	14	15
33	16	17	18	19	20	21	22
34	23	24	25	26	27	28	29
35	30	31					

To select an entire week, click the week number.

		August		2020			
Wk	Su	Mo	Tu	We	Th	Fr	Sa
30							1
31	2	3	4	5	6	7	8
32	9	10	11	12	13	14	15
33	16	17	18	19	20	21	22
34	23	24	25	26	27	28	29
35	30	31					

To select the same day for a month, click on the day.

		August		2020			
Wk	Su	Mo	Tu	We	Th	Fr	Sa
30							1
31	2	3	4	5	6	7	8
32	9	10	11	12	13	14	15
33	16	17	18	19	20	21	22
34	23	24	25	26	27	28	29
35	30	31					

When selecting

**Weekly**

To select a week, select the week .

Year: 2020									
1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53							

To select multiple weeks, click on individual weeks.

Year: 2019									
1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20
21	22	23	24	25	26	27	28	29	30
31	32	33	34	35	36	37	38	39	40
41	42	43	44	45	46	47	48	49	50
51	52	53							

When selecting

**Monthly**

To select a month, click the month.

Year: 2020		
January	February	March
April	May	June
July	August	September
October	November	December

To select multiple months, click on the months.

Year: 2019		
January	February	March
April	May	June
July	August	September
October	November	December

When selecting

**Month End**

To select month end, click on the last month.

Year: 2019		
January	February	March
April	May	June
July	August	September
October	November	December

When selecting

**Yearly**

To select a year, click the year.

Report - Calendar Analysis

2011	2012	2013	2014	2015
2016	2017	2018	2019	2020

To select multiple years, click on the years.

Report - Calendar Analysis

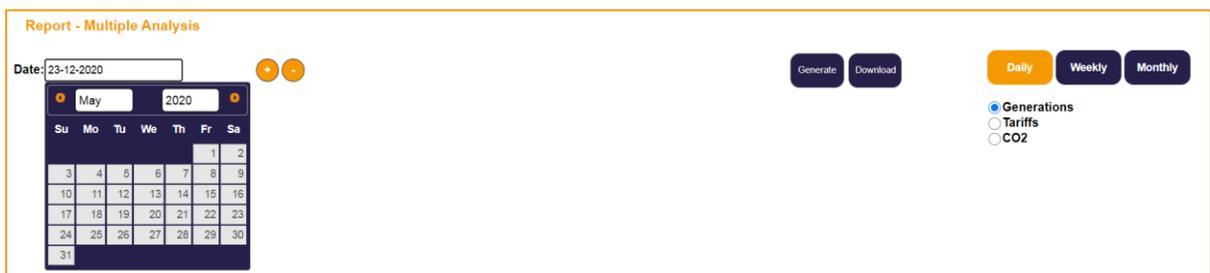
2011	2012	2013	2014	2015
2016	2017	2018	2019	2020

Click **Generate** which will display the comparative days data, you can export into Excel, click **Download**

To de-select dates, click on the dates highlighted in orange you want to remove from the report and they will turn blue.

• **Multiple Analysis**

Hover over Report, 'Multiple Analysis'



Select the PV you would like to analyse 

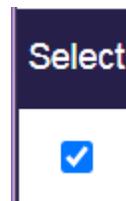
You can narrow the selection down

Panel Type:  Inverter Type:   
 Roof Orientation:  Postcode:   
 Address:  kWp range from:  To:

Once you have narrowed the sites you would like to analyse click the sites by selecting them

Then click

The report can be analysed



Date:   
 Week:  Year:   
 Month:  Year:

Click  which will display the comparative days data, you can export into Excel, click

To de-select sites, tick  the sites you want to remove then click 

- **Expected vs Actual Yield**

Hover over Report, 'Expected vs Actual'

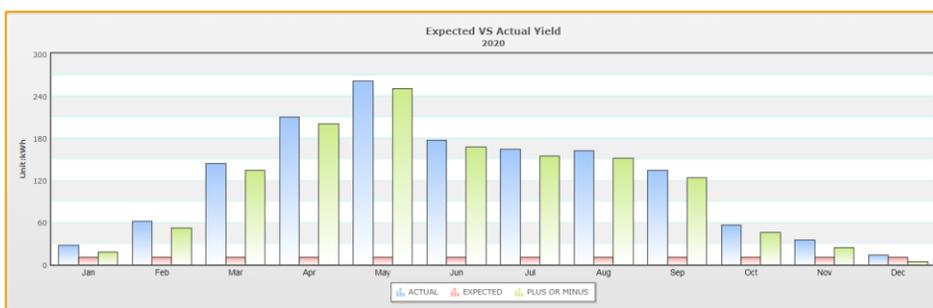


This shows how the system is performing if the expected data has been added, if the dashboard says no data found please refer to 'yield targets' on page 21.

**Report - Expected VS Actual Yield**

Year:

Click [Generate](#) which will display the comparative days data, you can export into Excel, click [Download](#)



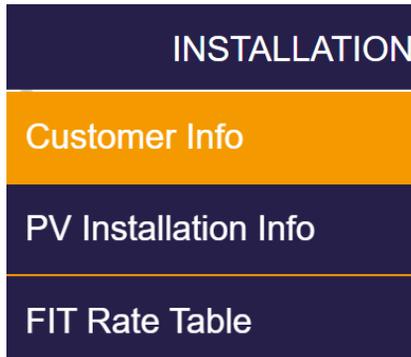
The report will show the expected monthly generation and the actual monthly generation and the difference between the two (+/-) and the annual expected and annual actual and the difference between the two (+/-).

The actual data can be compared in this report to ensure the panels are generating as expected before they were installed.

## 4. Installation

- **Customer Information**

Hover over Installation, 'Customer Info'



Installation - Customer Info

Customer Name:  Customer Type:

Select	Customer Name	Customer Type	Email Address	Phone Number	Address	Comments
--------	---------------	---------------	---------------	--------------	---------	----------

This holds information about each of the relevant people involved in the project. All boxes are all free text fields. Which allows you to type any Text-based data into the boxes.

\* Customer Type:

\* Customer Name:

\* Report Type:

Phone Number:

Fax Number:

Bucket Id:

Client Id:

Email Address:   
Use the character ';' to split multiple email addresses. eg xxx@xxx.xxx.xxx@xxx.xxx

Address:

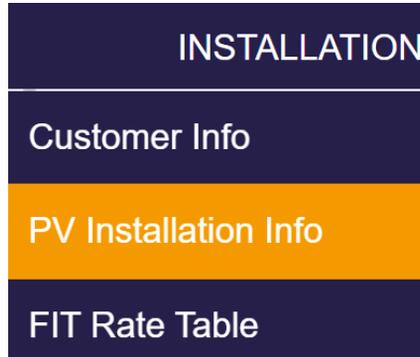
Comments:

Please note the Customer Type and Customer Name cannot be edited.

**ALWAYS CLICK  BEFORE MOVING ON**

- PV Installation Information**

Hover over Installation, 'PV Installation Info'

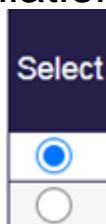


You can search for specific installations by Investor, Landlord, address or meter number. You can also scroll through all installations listed below.

Installation - PV Installation Info

Investor:  Landlord:  Building:  Meter No.:

Select the installation you want to view in more detail clicking select.



Click  to view the installation in more detail. To analyse the sites for more detail you can export into Excel, click

This shows the same detail as the  tab on the home page.

* Meter No.: <input type="text"/>	Meter Type: <input type="text" value="Base Select"/>	* Installed Date: <input type="text"/>
* Energy Type: <input type="text"/>	* Tariff Type: <input type="text"/>	Eligibility Date: <input type="text"/>
Roof Direction: <input type="text"/>	MCS No.: <input type="text"/>	System kWp: <input type="text"/>
Project: <input type="text"/>	MPAN: <input type="text"/>	EPC Grade: <input type="text"/>
Inverter Type: <input type="text"/>	Panel Type: <input type="text"/>	EPC Number: <input type="text"/>
Initial Reading (kWh): <input type="text"/>	* Installed Type: <input type="text"/>	
* Investor: <input type="text"/>	Sub Investor: <input type="text"/>	* Landlord: <input type="text"/>
Sub Landlord: <input type="text"/>	Tenant: <input type="text"/>	Installer: <input type="text"/>
Supplier: <input type="text"/>	Irradiance SN.: <input type="text"/>	
FIT Accreditation Id: <input type="text"/>	Client RGS Id: <input type="text"/>	
* Building: <input type="text"/>	* Street: <input type="text"/>	Town: <input type="text"/>
County: <input type="text"/>	Country: <input type="text"/>	* Postcode: <input type="text"/>
Old Meter No.: <input type="text"/>	Meter Change Date: <input type="text"/>	
Comments: <input type="text"/>		

- **FiT Rate Table**

Hover over installation, 'FiT Rate Table'

INSTALLATION
Customer Info
PV Installation Info
<b>FiT Rate Table</b>

This shows the rate in pence for FiT for each installation, this is based on the information provided on the original completion sheets to Orsis:

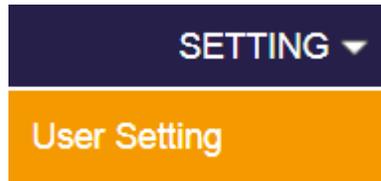
1. Eligibility date
2. Tariff type
3. Installed type

Date	Fit Rate	Export Rate
01/04/2017 to 31/03/2018	11.73	5.03
01/04/2016 to 31/03/2017	11.44	4.91
01/04/2015 to 31/03/2016	11.3	4.85

## 5. Setting

- User setting

Hover over settings, 'User Settings'



To set up your installation to highlight in **red** if they are not working.

To highlight the installation red when not working.

\*Login Code:

\*Name:

Telephone:

Mobile Phone:

Fax:

Highlight if not working for  hours

To receive a daily alert via email enter the amount of hours of no generation/no data, click yes to alarm recipient, and enter the email addresses of the recipient(s).

To report sites that have stopped working.

\*Login Code:

\*Name:

Telephone:

Mobile Phone:

Fax:

Highlight if not working for  hours

No Generation for  hours    Alarm Recipient:  Yes  No

Email:   
Use the character ',' to split multiple email addresses. eg.xxx@xxx.xxx;xxx@xxx.xxx

No Data in Last  hours    Alarm Recipient:  Yes  No

Email:   
Use the character ',' to split multiple email addresses. eg.xxx@xxx.xxx;xxx@xxx.xxx

Address:

To report sites that have not advanced.

**ALWAYS CLICK**

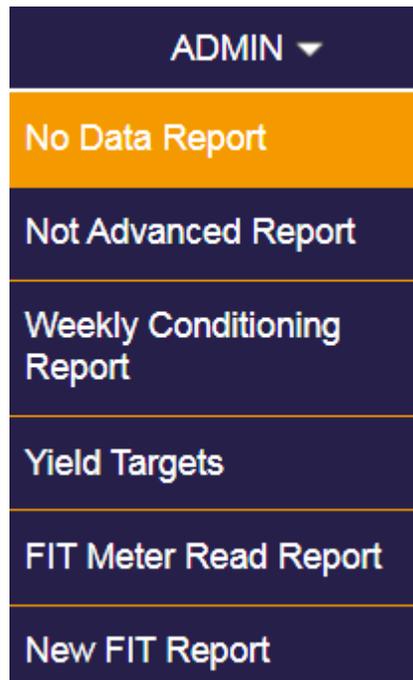
**Save**

**BEFORE MOVING ON**

## 6. Admin

- **No data report**

Hover over Admin, 'No Data Report'



From there you can select the amount of hours you would like to view, type in the amount of hours.

No data in last  Hours

Click [Generate](#) which will display the data, you can have the report in Excel by clicking

[Download](#)

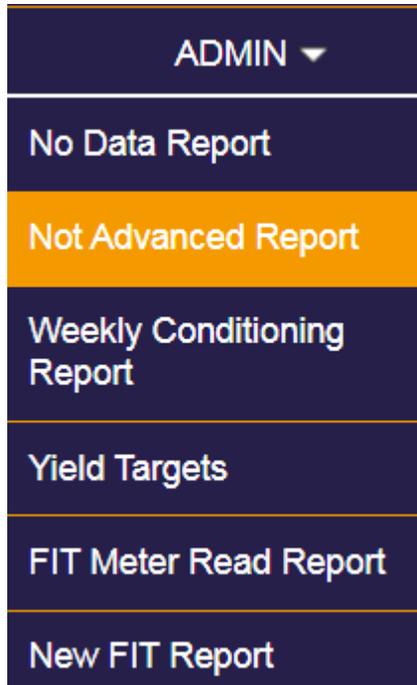
Once the data has loaded it will show the below:

Meter Serial number	Date & Time it stopped working	Address	Postcode	Last Reading
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To receive these reports automatically via email please see page 17

- **Not Advanced Report**

Hover over Admin, 'Not Advanced Report'



From there you can select the amount of hours you would like to view, type in the amount of hours.



Click **Generate** which will display the data, you can have the report in Excel by clicking **Download**

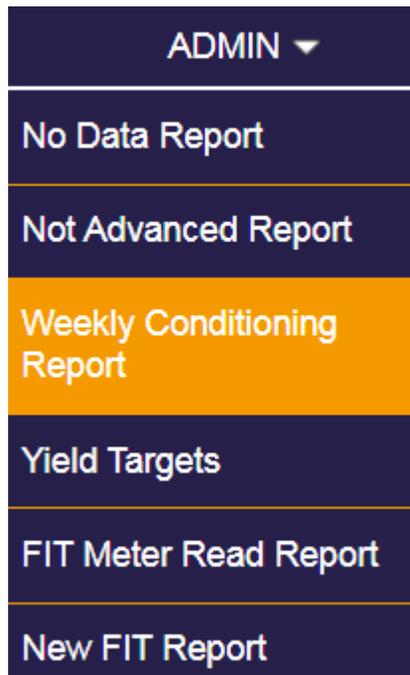
Once the data has loaded it will show the below:

Meter Serial number	Date & Time it stopped advancing	Address	Postcode	Last Reading
---------------------	----------------------------------	---------	----------	--------------

**To receive these reports automatically via email please see page 17**

- Weekly Condition Report**

Hover over Admin, 'Weekly Conditioning Report'



A report analysis can be produced for a specific week, the date range will be automatically aligned to the week MON- SUN.

Data Healthy	<span style="color: green;">■</span>
Data not advancing	<span style="color: orange;">■</span>
Data not received	<span style="color: red;">■</span>
Day excluded from report	<span style="color: blue;">■</span>
Checking data between 10-05-2020 and 16-05-2020	

Address	Meter Number	MON	TUE	WED	THU	FRI	SAT	SUN	Generation
Orsis UK Ltd Test	3512090007	<span style="color: green;">■</span>	65.843						
Orsis UK Ltd Test	902141005372	<span style="color: green;">■</span>	119.2						

Select the date on the drop down calendar on right

**Admin - Weekly Condition Report**

Date:

Date: 02-03-2020

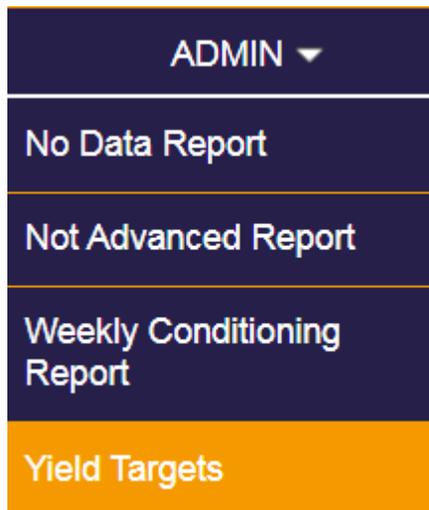
Mar		2020				
Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Click **Generate** which will display the data, you can have the report in Excel by clicking

**Download**

- **Yield Targets**

Hover over Admin, 'Yield Targets'



This allows you to manually update the expected monthly yield information for a selected year for the selected installation.



A screenshot of a web form titled 'Admin -- Yield Targets'. At the top, there is a 'Year' dropdown menu set to '2020'. Below this, there is a grid of 12 input fields, one for each month of the year. The months are arranged in four rows of three: Jan, May, Sep; Feb, Jun, Oct; Mar, Jul, Nov; Apr, Aug, Dec. Each input field contains the value '0.0'.

Once you have inputted the yield data you can then calculate further yield data using the previous years inputted.

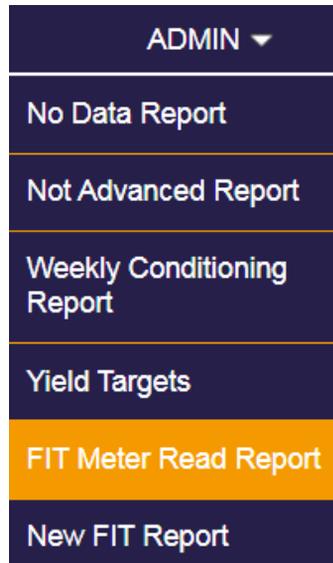


The degradation can be set by inputting the number for percentage of degradation  and clicking



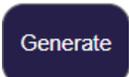
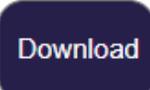
- **FiT Meter Read Report**

Hover over Admin, 'FiT Meter Read Report'



Select the month required

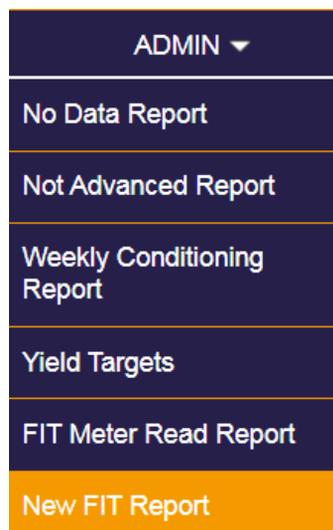


Click  which will display the data, you can have the report in Excel by clicking 

This is displayed in the format that you can submit to your FiT provider.

- **New FiT Report**

Hover over Admin, 'New FiT Report'



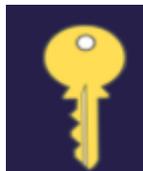
This shows all the installation details for each installation.

Meter serial number	Meter Type	Install Date	Eligibility Date	Current FIT Rate(p/kWh)
Current Export FIT Rate(p/kWh)	Energy Type	Tariff Type	Roof Direction	MCS Certificate
System KWP	Inverter Type	Panel Type	Installer Type	Investor
Landlord	Sub Investor	Sub Landlord	Tenant	EPC Number
Supplier	Installer	Building	Street	Town
County	Country	Post Code	FIT ID Number	RGS ID

The information is the same as  on the Home Page with the option to export.

## 7. Logging Out

To log out of the system click on the log out button at the top right-hand side.



**Orsis Support Team**  
**01423 537088**  
**support@orsis.co.uk**  
**www.orsis.co.uk**