How to Use This Guide

This purpose of this guide is to provide all BEETS users with a basic understanding of BEETS and how to work within the system. The guide will provide you with step-by-step instructions on most skills needed to process applications, but there are some program specific nuances that are not addressed in this guide. For more program specific guidance, visit the BEETS Landing Page (PENDING) for additional resources, or contact the BPA Team for assistance.

TIPS:

- *We recommend all new users of BEETS scan through the document and table of contents to **orient themselves on the content covered***.

- *Utilize **'Ctrl – F' to search for topics or terms** you may be seeking guidance around.*

- *Click on **Hyperlinks** throughout the document to take you to other relevant information.*

- *Click on **'Return to Table of Contents'** button at the bottom of each page to help navigate.*

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Introduction

Background information on BEETS

What is BEETS?

What is BEETS? *The BPA Energy Efficiency Tracking System (BEETS) is a reporting system launched in fall 2022 that* enables BPA & our Utility Customers to **optimize the conservation acquisition process through submitting, managing, tracking, and reporting of energy efficiency activity in one location.**

Important Note about BEETS
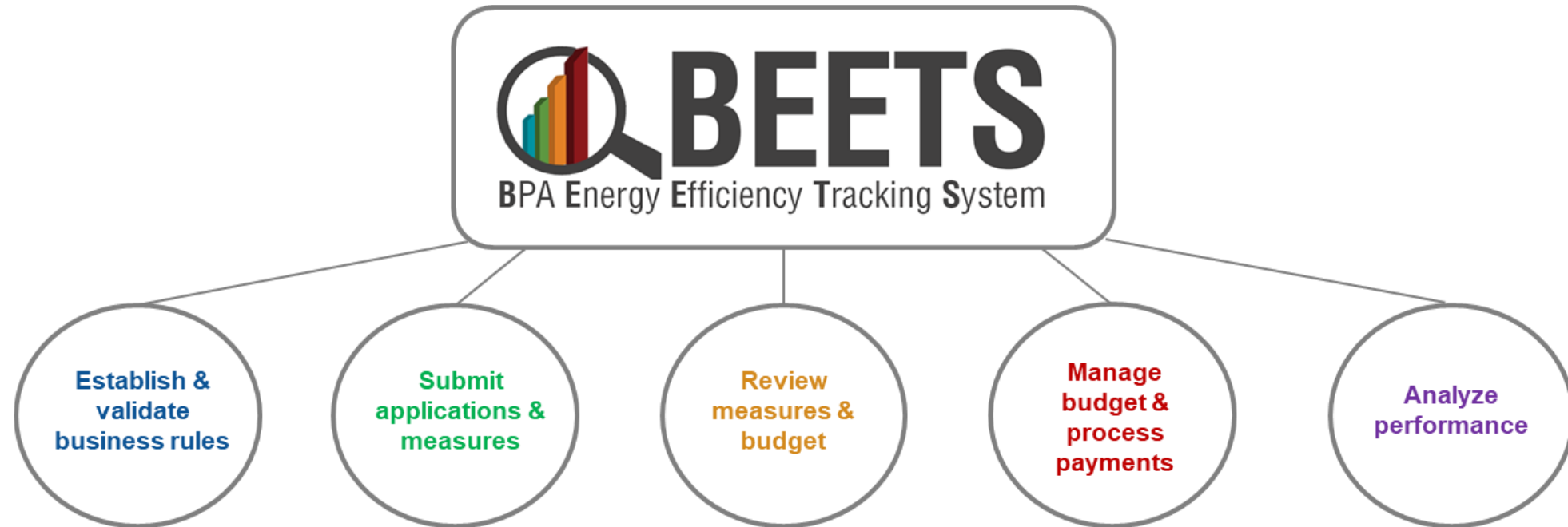
*BEETS is comprised of custom configuration and development of VisionDSM, an off-the-shelf commercial Demand Side Management (DSM) portfolio solution. **As VisionDSM was originally built for a different purpose than BEETS, you will see some native functionality that does not apply to BPA and our customers.** While these elements can be distracting, they are cosmetic in nature and <u>do not</u> impact the core functionality of BEETS. BPA will continue to work with the VisionDSM vendor to improve BEETS and provide a more streamlined and relevant experience for BEETS users.*

WORK IN PROGRESS

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BEETS Glossary

See below for a reference of common terminology in BEETS. NOTE: Due to some constraints around the off-the-shelf, some terminology could not be adjusted for BPA, so some may be different than in the past.

Term	Definition
Application	Reported measure or project
Equipment	Equipment = Measure; used interchangeably in BEETS
Form	Component of BEETS that stores application data
Invoice	Request for reimbursement (and/or documentation of self-funding); this is now a separate step from the application approval process in BEETS
Program	Types of reported measures/projects that share common reporting requirements, calculations, and business rules (i.e. group of UES related measures now encompass the UES program)
Premise (Address)	Address of site where measure is installed or facility where project is located
Widget	Dashboard components designed to facilitate easy access to common functions and reports
Workflow	Sequence of tasks included in the application process from submittal to invoicing where data is passed between users and/or systems

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Getting Started

Basics for getting started in BEETS

Getting Started - BEETS One-Time Setup

The first time you log into BEETS, it is HIGHLY recommended that you complete the 'One-Time BEETS One-Time Setup Checklist' found on the *BEETS Training Materials & Support Resources* website. This will ensure you have everything easily accessible and optimized before you submit you first application.

BEETS Training Materials & Support Resources

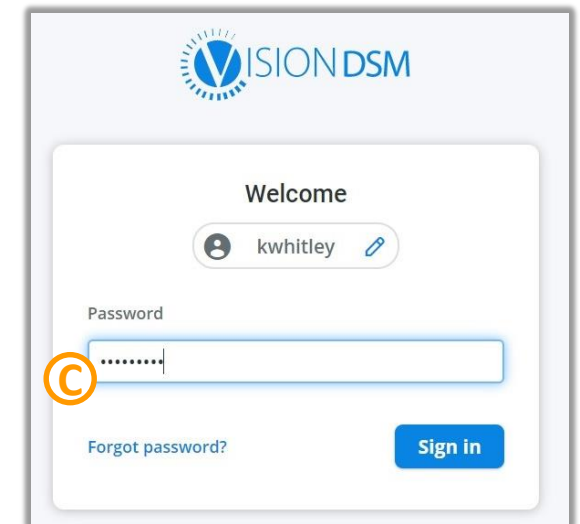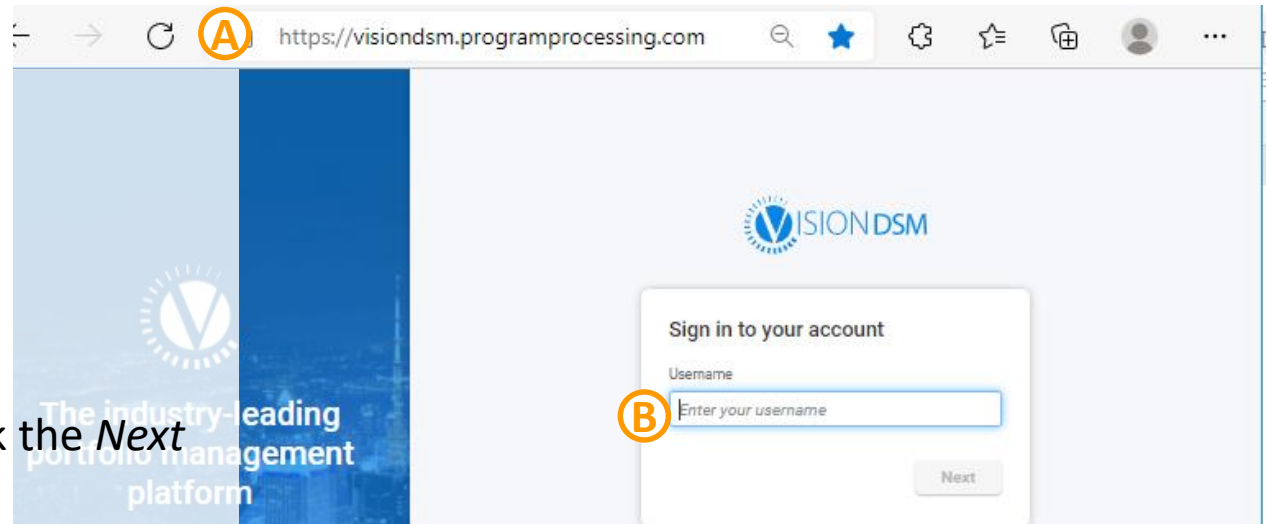(Additional Materials in Development)

General Training Materials & Reference −

BEETS One-Time Setup Checklist: Instructions on performing one-time set-up when first logging in to BEETS

BEETS Navigation Guide: Written guide including step-by-step instructions on how to navigate and work within BEETS

[VIDEO COMING SOON] Getting Started with BEETS (~40 mins): Full walkthrough of BEETS to orient new users on BEETS functions and navigation

[VIDEO COMING SOON] Finding Applications using Work Center Filters (~13 mins): Video walkthrough of how to build and save WorkCenter filters to easily access applications in BEETS

Logging In To BEETS

BEETS
BPA Energy Efficiency Tracking System

Steps on how to log in to BEETS.

Logging In To BEETS:

1. Enter the following URL in your browser:
   https://visiondsm.programprocessing.com/ Ⓐ

   • Bookmark this url for future use.

2. Enter your username into the *username field* and click the *Next* button. Ⓑ

   • If you have forgotten your username, contact BPA.

3. Enter user password into the *Password* field and click the *Sign In* button to log into your account.

4. If you have forgotten your password, click on *Forgot Password?* button and complete requested validation fields; reset instructions will be sent to the registered email address.

5. Once you log in, you will be taken to the *Dashboard* page in BEETS.

END

Ⓐ https://visiondsm.programprocessing.com

VISIONDSM

Sign in to your account

Username

Ⓑ Enter your username

Next

VISIONDSM

Welcome

kwhitley

Password

Ⓒ ••••••••

Forgot password?   Sign in
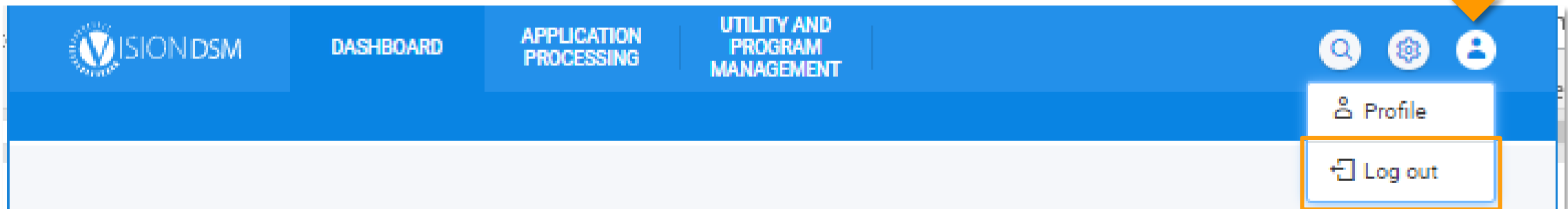
Logging Out of BEETS

Steps on how to log out of BEETS.

Logging Out of BEETS:

1. From the *BEETS Home Page*, click *profile icon* in the upper-right hand corner.

2. Select *Log Out* from the dropdown.

3. You will return to the sign-in screen.

END

Resetting Password

Instructions for resetting your password after you are logged in to BEETS.

> 💡 *If you have forgotten your password, follow instructions for* [logging in to BEETS](#).

Summary of Steps:

1. From *BEETS Home Page*, click *profile icon* in the upper-right hand corner. Ⓐ

2. Select *Profile* from the dropdown. Ⓑ

3. Click on *CHANGE PASSWORD* tab. Ⓒ

4. Complete *Old Password* and *New Password* fields. Ⓓ

5. Click *Save* at the bottom of the form. Ⓔ

6. Your new password is now set and should be used the next time you log in.

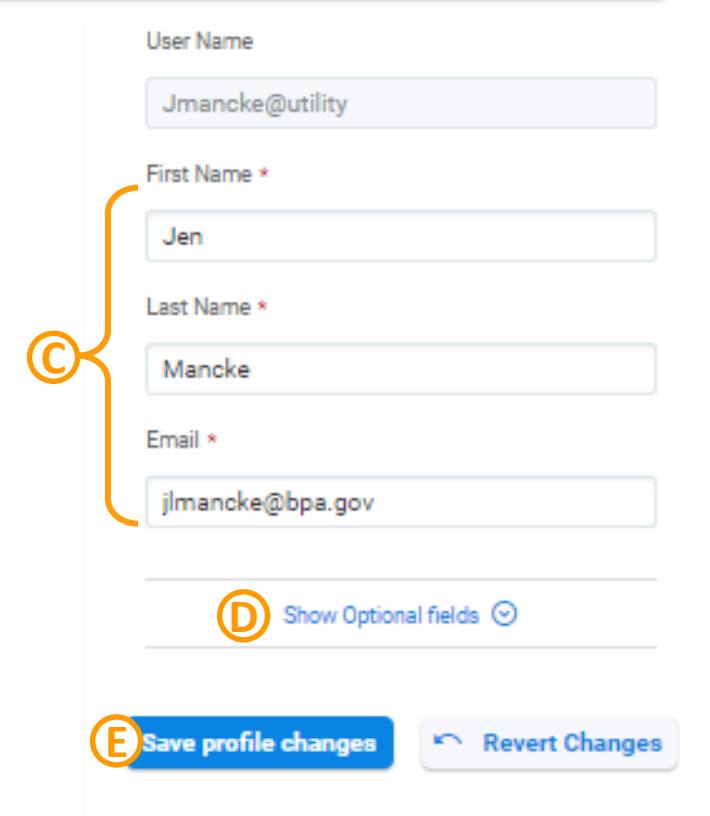**END**

Adjusting Profile Settings
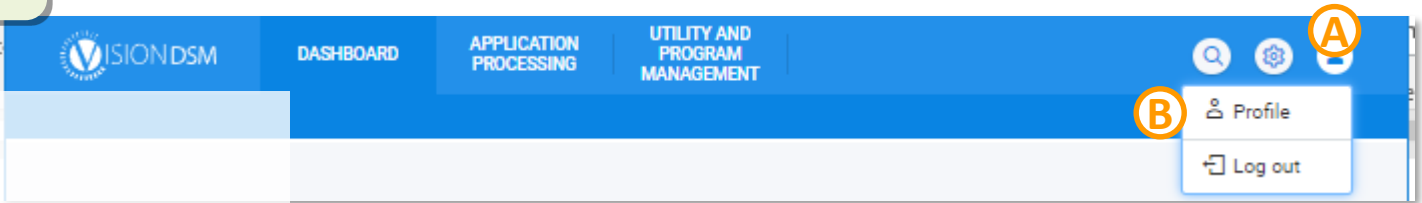
This section tells you how to adjust your profile settings.

Steps to Adjust Personal Settings:

1. Click *Profile Icon* in the upper right-hand corner of the BEETS home page. **A**

2. Click *Profile* from the drop down **B**

3. Under *Change Profile Details*, adjust as needed. **C**

   • Click the *Optional Fields text* to edit address information as needed. **D**

4. Click *Save profile changes* button to save updates. **E**

END

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BEETS Profile Customization
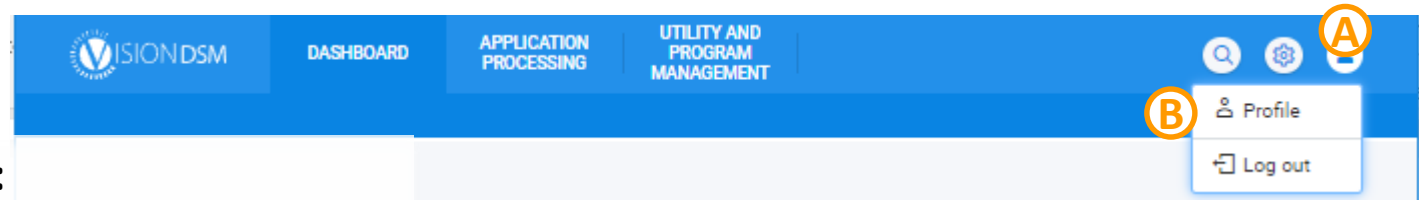
This section tells you how to change the personal 'look and feel' of BEETS. These settings will save the next time you log in.

Steps to Change Layout:

1. Click *Gear Icon* in the upper right-hand corner of the BEETS home page.

2. The following customization options will appear:

   - **LAYOUT:** Select 'Full Screen' or 'With Borders' view.

   - **FONT SIZE:** Select Normal or Large Font

   - **THEME MODE:** Allows you to choose the normal background or switch to a 'lighter' background view.

   - **COLOR THEMES:** Select from the multiple color theme options to customize your experience.

   - **ASK FOR CONFIRMATION WHEN CLOSING ALL OPEN TABS:** Enables feature to ask for confirmation before closing a tab, so you don't lose unsaved work

   - **ADJUST TIME FOR MY TIME ZONE:** Enables feature to show times in the time zone you're working in. ***RECOMMENDED***
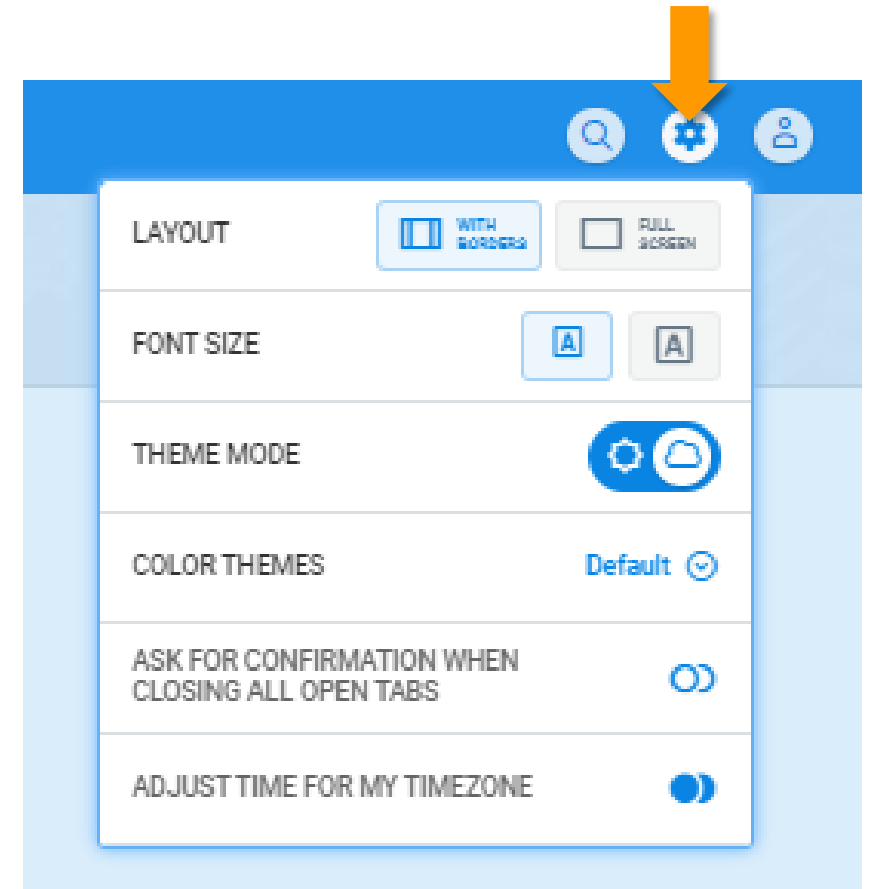
Global Navigation Search

Finding applications using Global Navigation Search

There are multiple ways to find applications in BEETS. This section tells you how to search for items in BEETS using the Global Navigation Search functionality, which is a great way to search broadly across the system.
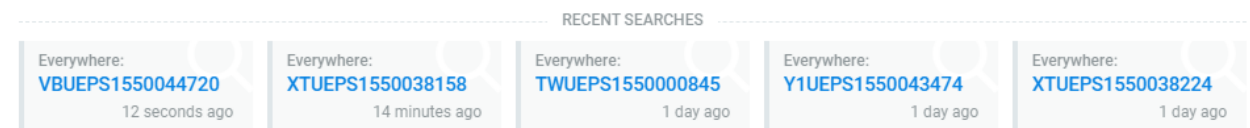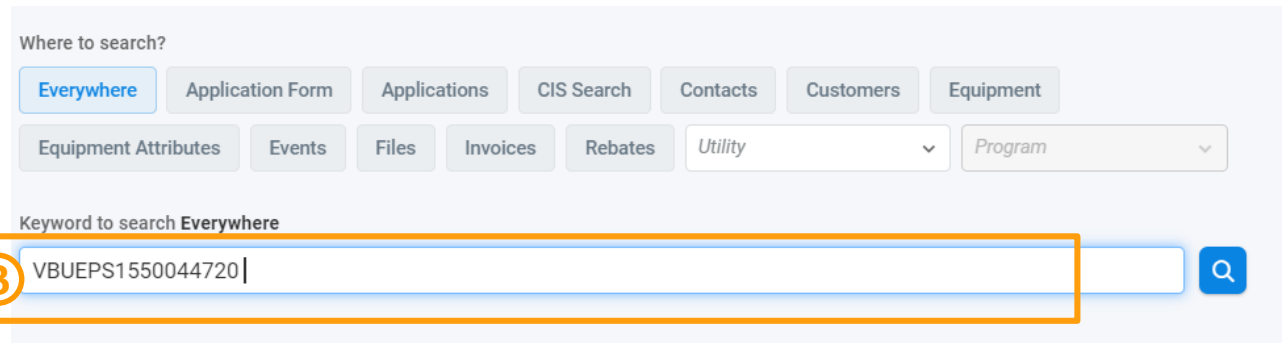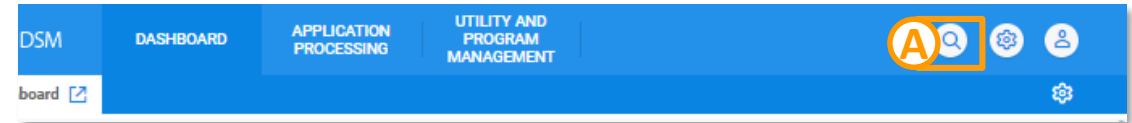
Summary of Steps:

1. Click on the *Search* icon in the top right corner of the BEETS home page. Ⓐ

2. The search window will appear. Type or paste search term in keyword field. Ⓑ

   - ***The quickest way to find an application is using the 16-digit Application Number (or sometimes called Project #),*** which is found in all email notifications that are distributed when you need to take action.

   > Hello,
   >
   > BPA has returned the project named Air-Source Heat Pumps with PTCS with Project #: VBUEPS1550044720 during compliance review. The reason(s) for this are:

TIP: Click on one of these boxes to see recent search results

If you know you will want to access the same type of applications on a regular basis, try using Work Center, which allows you to save your searches.

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Summary of Steps, continued:

3. OPTIONAL: The default is to search across the entire system (i.e. *'Everywhere'*). If desired, refine your search results by:

    - Selecting a *'Where to Search'* button to limit search results to one area of the system. **C**

    - Selecting a *'Utility'* from the drop down to limit search results to one utility only. This will only be relevant to those users who have access to multiple utilities. **D**

4. Click on the blue *Search* **E** icon to show search results.

Continued on next page....

Where to search?

| Everywhere | Application Form | Applications | CIS Search | Contacts | Customers | Equipment |

| Equipment Attributes | Events | Files | Invoices | Rebates | Utility ∨ | Program ∨ |

Keyword to search **Everywhere**

VBUEPS1550044720

If no search results are returned, be sure that 'Everywhere' is selected in the 'Where to Search' section as you may have unintentionally limited the search results.

RECENT SEARCHES

| Everywhere: XTUEPS1550038158 | Everywhere: TWUEPS1550000845 | Everywhere: Y1UEPS1550043474 | Everywhere: XTUEPS1550038224 |
| 14 minutes ago | 1 day ago | 1 day ago | 1 day ago |

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Summary of Steps, continued:

5. Results will then display as shown below. The bolded search results will show you which field in the system your results were found. *NOTE: Be sure to review the referenced field name to avoid accessing the wrong result.* **F**

6. Once you identify the desired result, hover in the upper right corner of result box and an *Open* icon will appear; click on *Open* icon to open the result. **G**

7. If needed, click the *'See all results'* link at the bottom of the page view to expand your Search results. **H**

Continued on next page…

💡 *If you search 'Everywhere' by Application #, the results will always include at least two search results as the Application # is stored in both the Application Form and Application Information data. You can select either to go to that specific application page.*

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Using Global Navigation Search in BEETS (4 of 4)

Summary of Steps, continued:
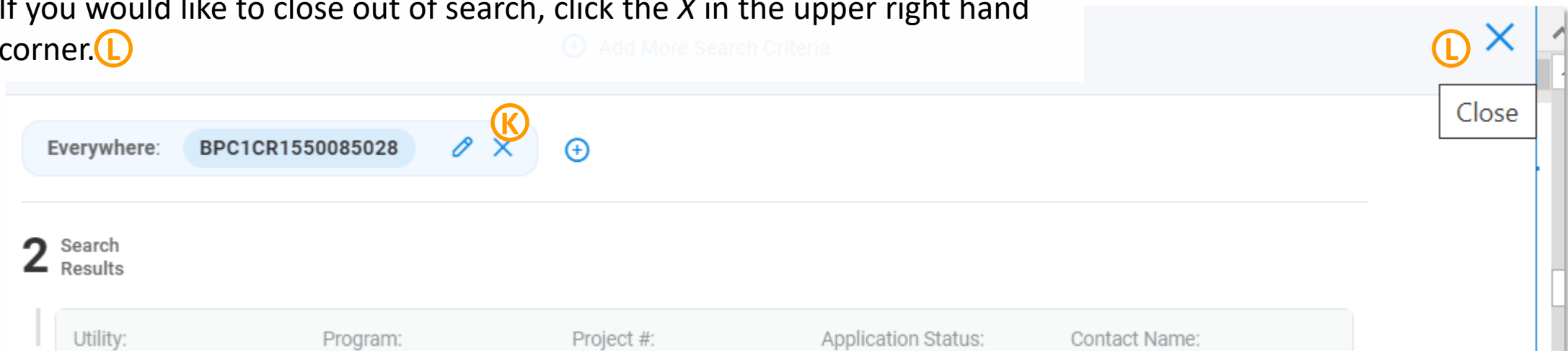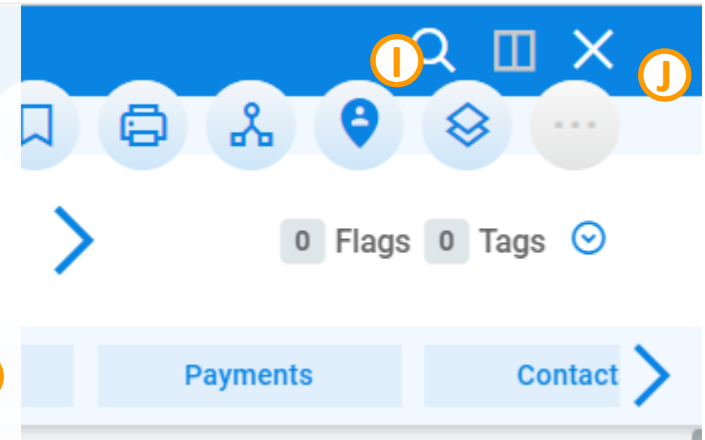
8. The *Application Page* will open.

9. To return to your <u>previous search results</u> from *Application Page*, click on the *Search* Icon in the upper right hand corner. **I**

10. To perform a <u>new search</u> from the *Application Page*, click *X* icon in upper right. **J**

11. The search screen will appear:

- If you want to perform a new search, be sure to click the *X* next to the previous results to remove. **K**

- If you would like to close out of search, click the *X* in the upper right hand corner. **L**

END

Everywhere: BPC1CR1550085028

2 Search Results

Utility:	Program:	Project #:	Application Status:	Contact Name:

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Page Views and Customizations

Navigating pages and customizing views

Navigating Pages

Review guidance below to understand how to navigate page views in BEETS.

Page View Navigation:

- When a page view is opened in BEETS, a 'breadcrumb' of each page will appear at the bottom of the screen, allowing you to navigate back and forth between pages. **(A)**

- Click on tab to view or on *X* icon to close; NOTE: one breadcrumb will always remain open. **(B)**

- Scroll down using the scroll bar on the right to view more results. **(C)**

- Multiple page results are visible in a vertical side bar; click on page number to move to next page. **(D)**

END

To return to the dashboard, keep on clicking on the leftmost breadcrumb until you return to the home screen.

Customizing Columns

Throughout BEETS, when you see a results grid, you will also see a Gear icon in the upper right-hand corner that indicates you can customize the columns in your view and optimize the display. Which columns are available vary by location in BEETS.

Summary of Steps:

1. To configure columns displayed or reorder columns, click on *Gear Icon* to view.

2. Click on the column name to toggle between show and or hide column (if unchecked, column is hidden)
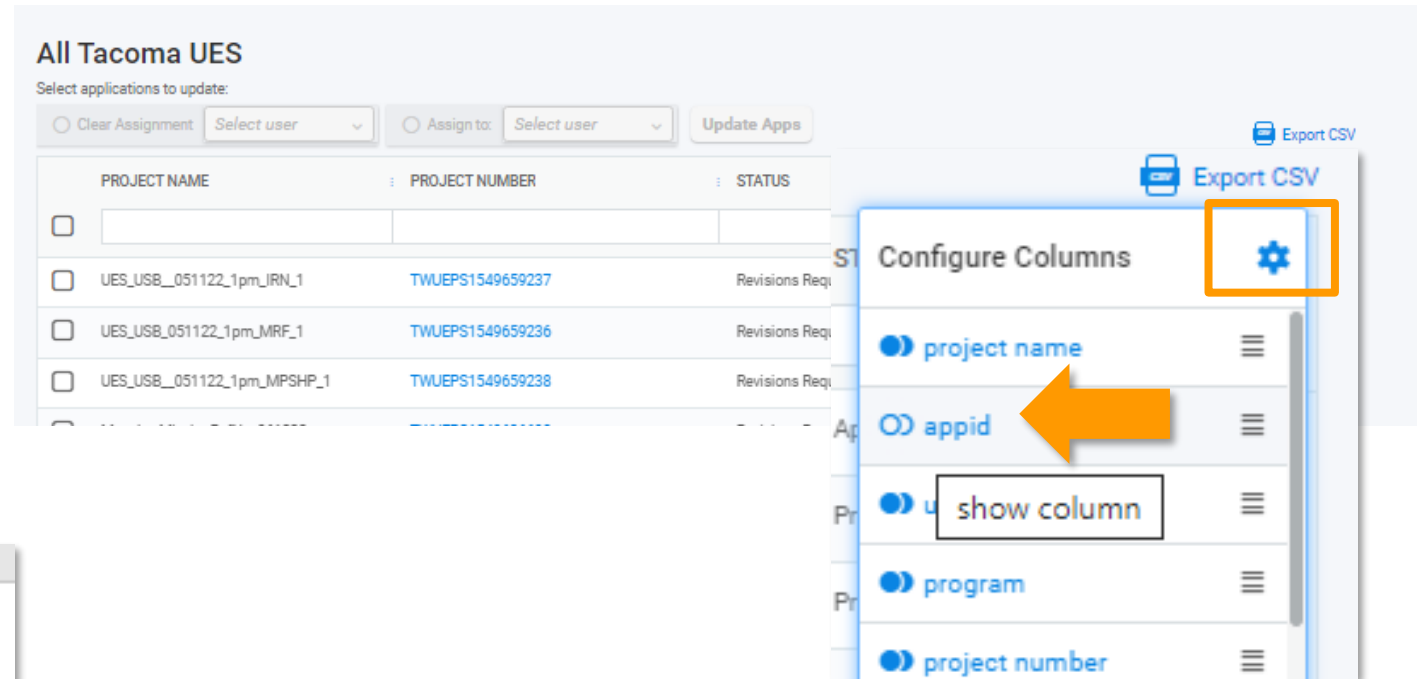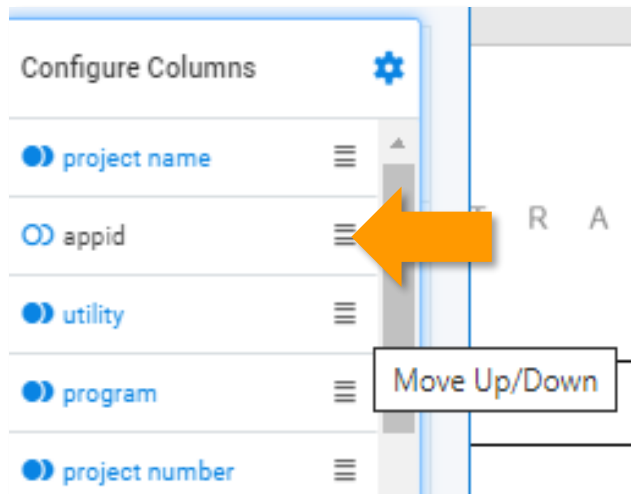
3. Hover over the ☰ icon to the right of the column name and the cursor will turn to a 'hand'.

4. Drag and drop to reorder columns.

END

Split Screen Functionality (1 of 2)

The split screen feature allows you to view two different applications in BEETS on the same screen; this includes the ability to synchronize scrolling on two forms in different windows.

Summary of Steps:

1. Open the two applications you would like to view on the same screen; an application tab will open for each at the bottom of the screen. Ⓐ

2. Click on one of the application tabs to open. Ⓑ

3. Click on the *Split Screen icon* in the upper right hand corner activate split screen. Ⓒ

4. Click on the other application tab at the bottom; you will now see both windows on the screen the applications tabs will be linked.

Continued on next page...
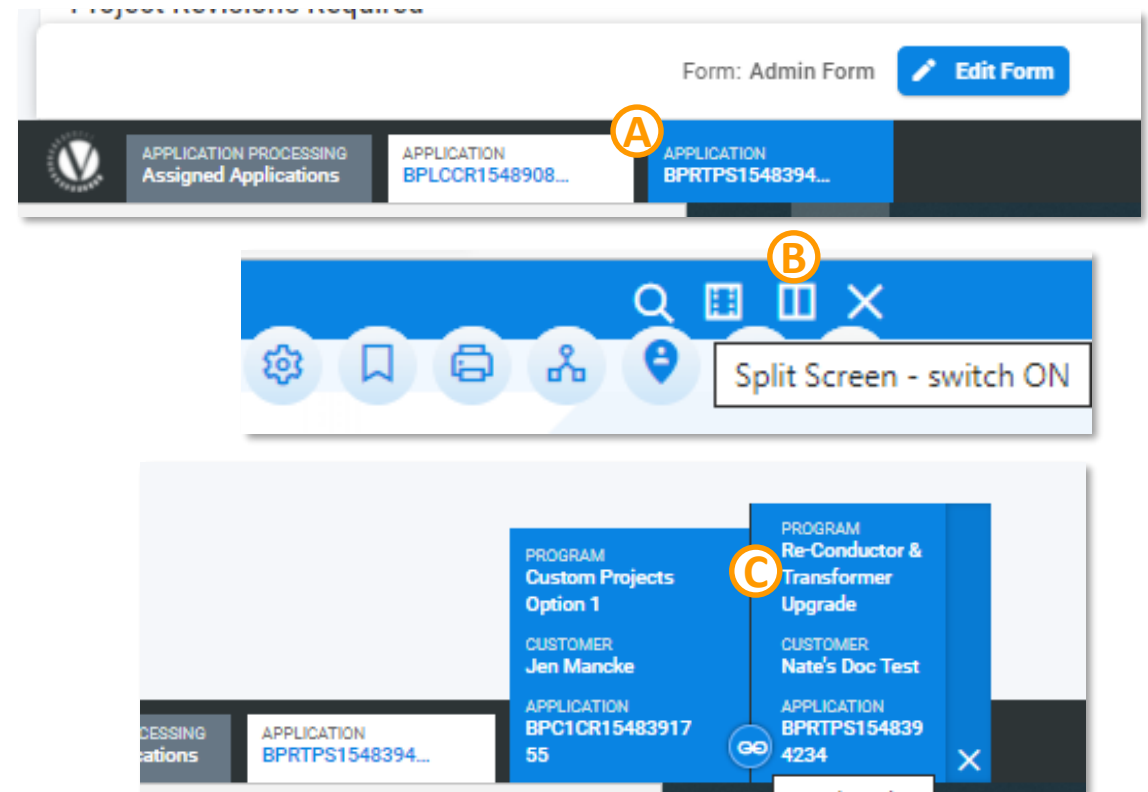
Summary of Steps, continued:

5. To synchronize scrolling, click on the *Forms* tab in both windows. (D)

6. Click on the [icon] icon between the two application tabs to scroll both Forms in a synchronized manner. (E)

   - Click the [icon] icon again to remove the synchronization.

7. To remove the split screen view, click on the *X* icon at the bottom right, the application on the left will close. (F)

END

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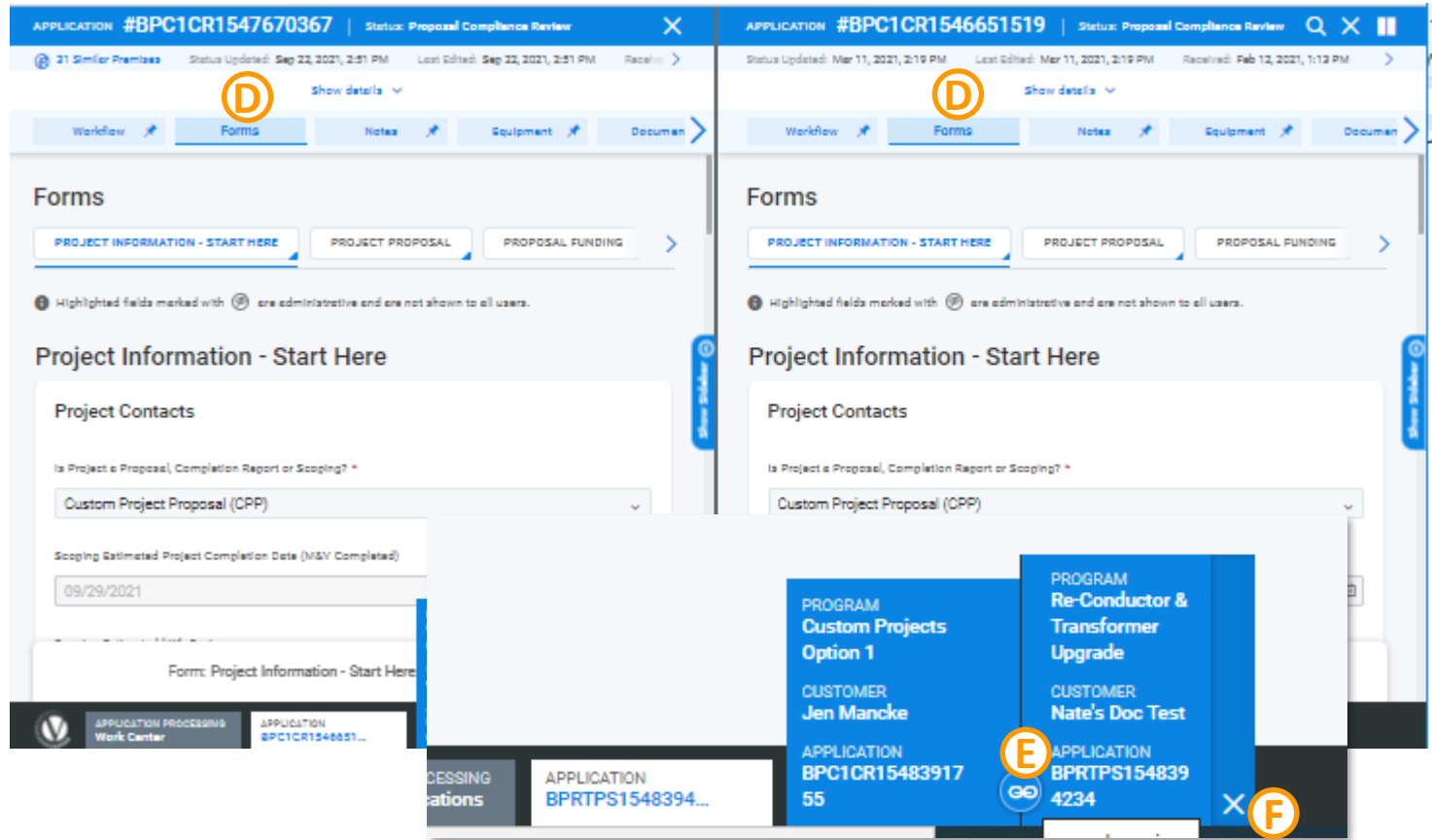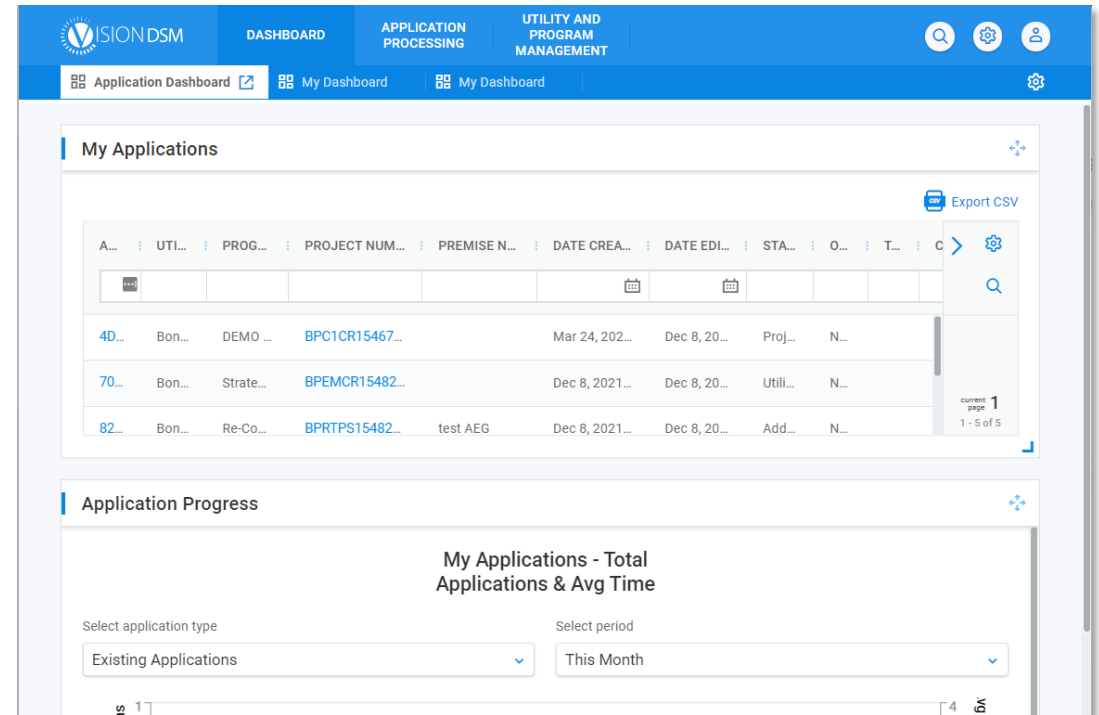
Dashboards

Viewing customizable reports and widgets on the BEETS home page

BEETS Dashboard Overview

BEETS includes a **dashboard reporting feature** that allows utilities to access updated data around energy-efficiency application status, budgets, and invoice payments. The dashboard screen across users may look different as this screen can be customized to individual preferences.

Benefits:

- Data **updated daily**

- Allows utilities to **analyze performance at a glance**

- **Customizable** – Users can select from many pre-built reporting "Widgets" that can be displayed on the same or multiple dashboards; order and sizing can be adjusted to users preference

- Programs & applications can be **bookmarked** for quick and easy access.

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Dashboards:
Dashboard Setup

Dashboard Widget Options

There are many dashboard widgets, or components designed to facilitate access to the most used functions, that are available to users within the BEETS system. Customers can determine which widgets are always accessible on their Dashboards when they log into BEETS.

Required Dashboard Widgets*:

- **Application Bulk Uploader (Customers Only):** Widget required to submit applications via bulk upload

- **Budget & Savings Dashboard (PowerBI Report):** Summary of utility budgets and savings data; reference to verify budget before invoicing. *See Invoicing and Performance Payment Guide for details.*

- **Invoice Dashboard (Paginated Report):** Summary of invoice details; *See Invoicing and Performance Payment Guide for details.*

Widgets that may be helpful (based on user preference):

- **Application Summary:** List of applications by program and status

- **Bookmarked Applications:** List of all bookmarked applications

- **Bookmarked Programs:** List of bookmarked programs

- **Bookmarked Utilities:** List of bookmarked utilities (most helpful if you work with multiple utilities)

- **Recent Apps:** List of applications you personally have recently accessed

Widgets to Ignore (i.e. not relevant to BPA): ✗

- *Application Activity Graph*
- *Assigned Apps*
- *Bookmarked Contact Invoices*
- *Bookmarked Utility Contracts*
- *Scanned Apps*
- *Text*

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*Setup of these required dashboards covered in the BEETS One-Time Setup Checklist

Adding a BEETS Dashboard

Guidance for adding your personal BEETS dashboard(s) to the home page when you log in.

Summary of Steps:

1. From the *Dashboard* tab on the BEETS home page, click on the white *Gear* icon in the upper right-hand corner. **(A)**

2. Click on *Add Dashboard*. **(B)**

3. Type in *Name* field to create unique dashboard name. **(C)**

4. Click on *Add Widget*. **(D)**

5. Select report from *Widget Type dropdown*. **(E)**

6. If desired, click *Add Widget* again to add an additional widget to the same dashboard. **(D)**

7. Click *Save* button; your Dashboard will now be visible on the Dashboard tabs at top of screen.

END

If you haven't already, we recommend completing the BEETS One-Time Setup Checklist for guidance on which key dashboards are needed for Invoicing.

Customizations of BEETS Dashboards

BEETS
BPA Energy Efficiency Tracking System

Dashboards provide easy access to the relevant information in fewer 'clicks'. BEETS allows users to customize the home page display after log in. These personalized dashboard views can be created with one or more sections (or 'Panels') to display programs, applications, and/or functionality in a single page view.

Configuration Options: From the dashboard home page, click on the white *Gear* icon in the upper right hand corner to see configuration options.
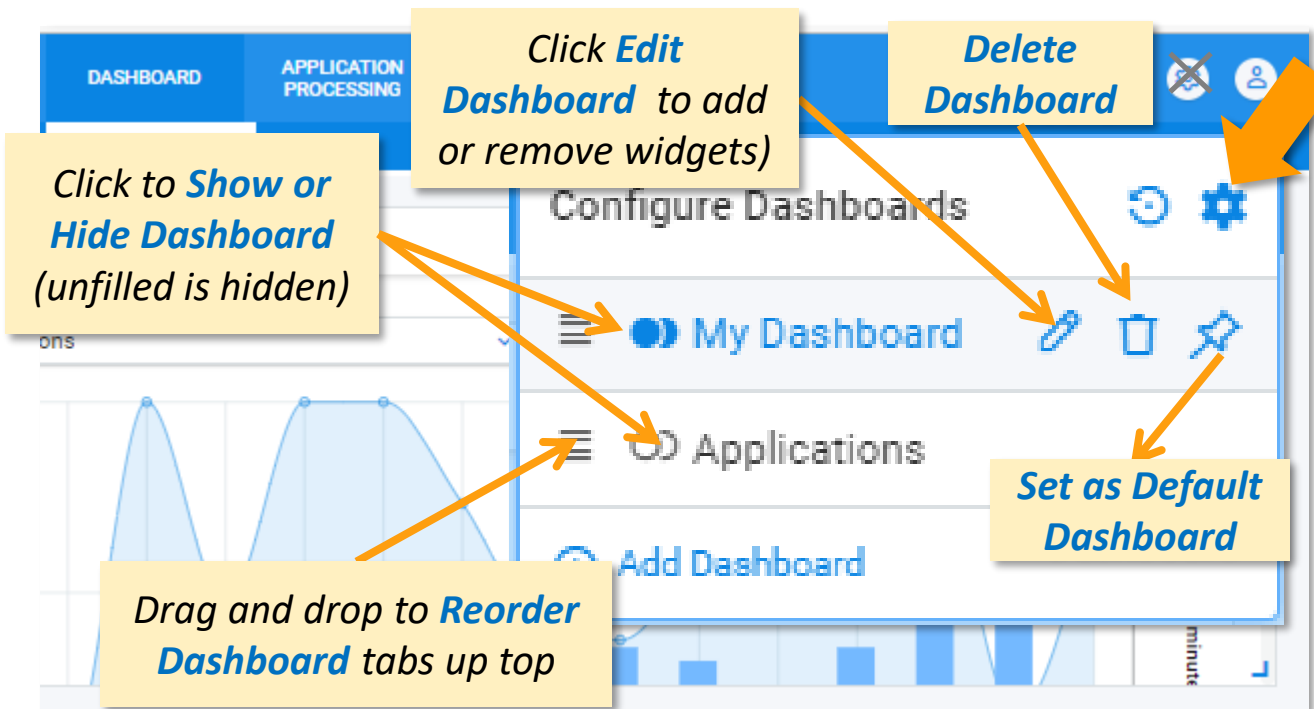
Move or Resize Dashboard Panels: From the dashboard home page, you will see the options below for each panel displayed.

Click *Edit Dashboard* to add or remove widgets)

Delete Dashboard

Click to *Show or Hide Dashboard* (unfilled is hidden)

Set as Default Dashboard

Drag and drop to *Reorder Dashboard* tabs up top

Drag and Drop the Dashboard Panel to move panel up or down

Click and hold to Move or Resize Dashboard

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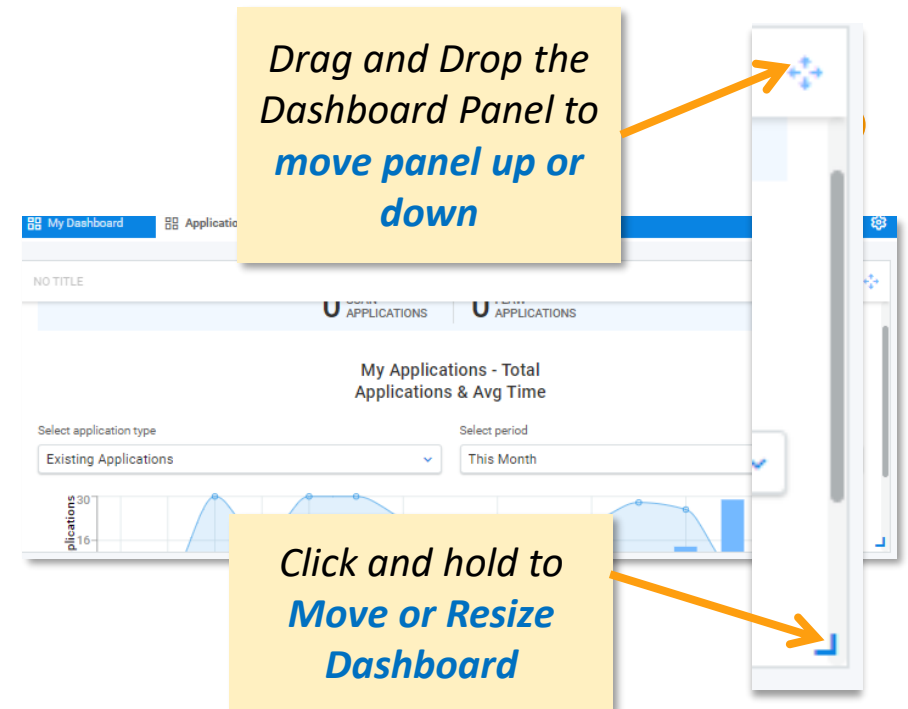
Adding Bulk Uploader Widget to Dashboard (*also covered in BEETS One-Time Setup Checklist*)

Follow the steps below to perform the underlined one-time process of adding the bulk upload widget to your BEETS Dashboard. This must be completed before you can upload a template into the system. NOTE: If you do not see this option available, it is likely a permissions setting that needs to be applied. Please contact your EER for assistance.

Summary of Steps:

1. From the Dashboard tab, click on the *Gear* icon in the upper right hand corner and a *Configure Dashboards* screen will appear. Ⓐ

2. Click on *Add Dashboard*. Ⓑ

3. A new screen will appear, click on *Add Widget*. Ⓒ

4. Select *Application Bulk Uploader* from the drop down list. Ⓓ

5. If desired, add a custom title reference in the *Title* field. Ⓔ

6. Click the *Save* button at the bottom.

7. You will be returned to the Dashboard screen, and the *Application Bulk Uploader* widget will now be visible and ready upload your program template(s). Ⓕ
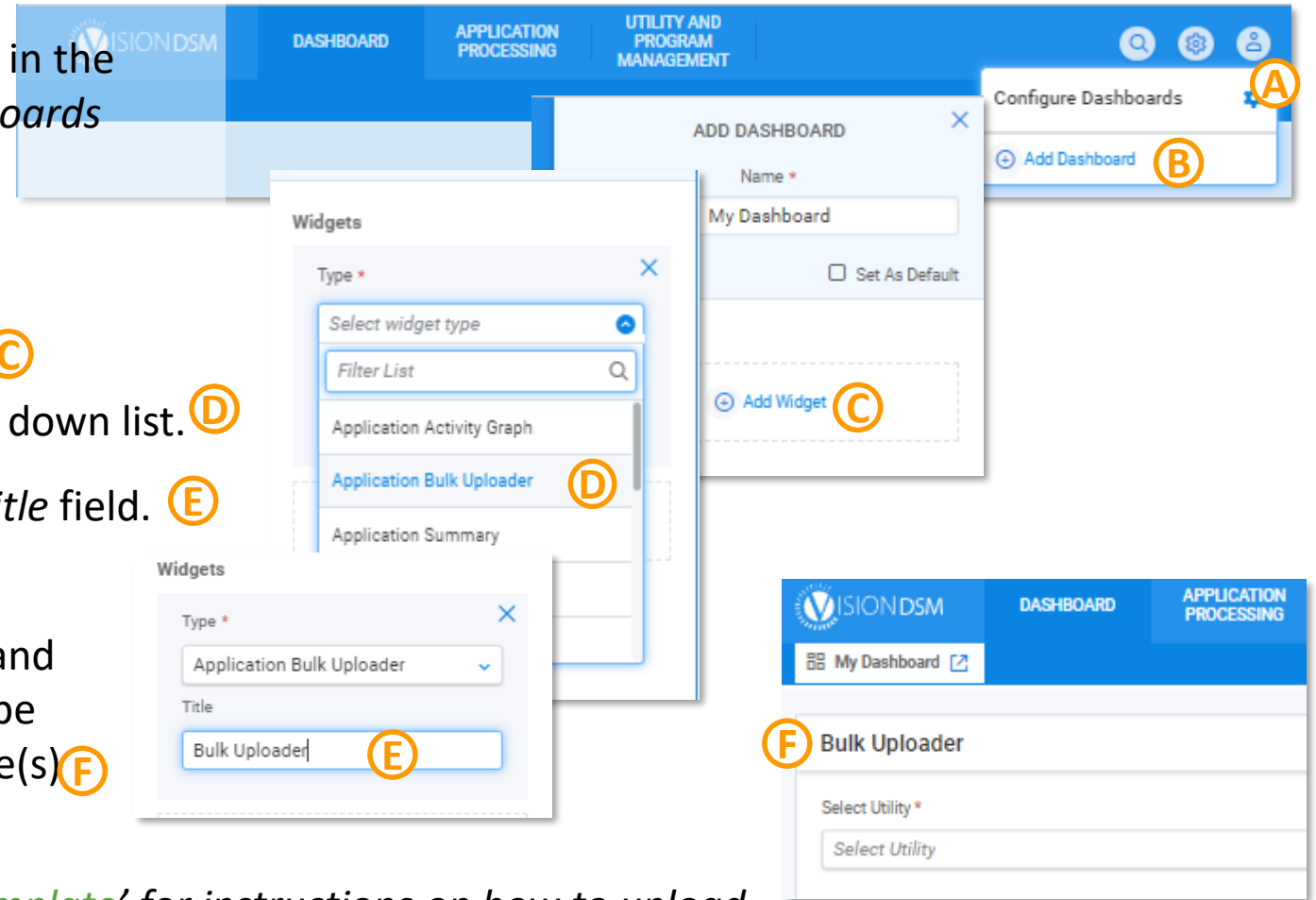
END

See 'Application Entry via BEETS Upload Template' for instructions on how to upload.

Application Entry

Creating applications in BEETS

Types of Application Entry in BEETS

There are two ways to enter applications in BEETS. The entry method varies depending on the program type and must be followed to ensure application is processed properly:

	Bulk Upload	Manual Entry
UES Measures	✓	
Non-Residential Lighting Program	✓	
Custom Projects Option 2 (C2)	✓	
Non-Reportable Program	✓	
BPA Managed Programs (BPA ONLY)	✓	
Custom Projects Option 1 (C1)		✓
Custom Programs		✓
Small Compressed Air (SCA)		✓
Energy Project Manager (EPM)		✓
Strategic Energy Management (SEM)		✓
Re-Conductor & Transformer Upgrade		✓
Performance Payments		✓

*For **Bulk Upload Programs,** application entry must be done through the Bulk Upload Template and should not be manually entered directly in the system. If this entry guidance is not followed, the workflow may not work properly.*

Step by Step Instructions:

- **Instructions for Entry via Bulk Upload Template**

- **Instructions for Manual Entry via 'New Application' button**

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Application Entry:
Application Entry via Bulk Upload

BEETS
BPA Energy Efficiency Tracking System

UES, Non-Residential Lighting, Custom Projects Option 2, BPA Managed and Non-Reportable program applications must be entered via template and uploaded into BEETS using the bulk uploader widget.
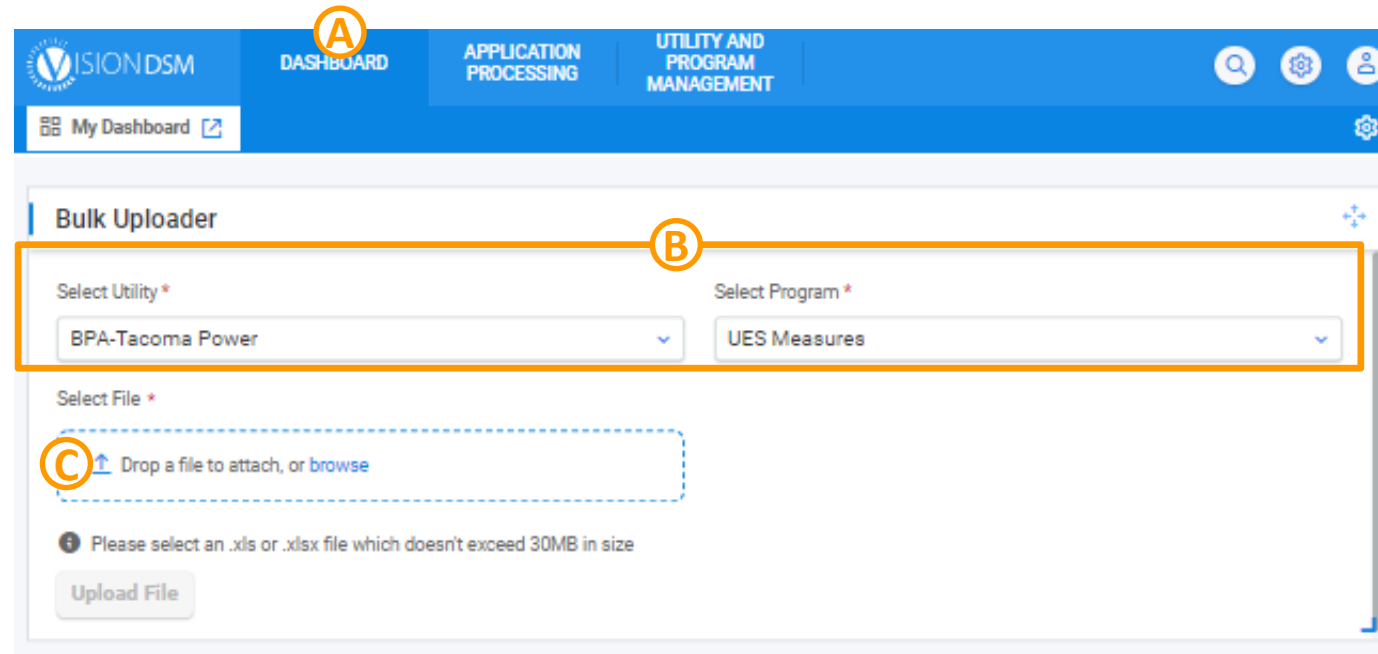
Summary of Steps:

1. Once you have completed the BEETS Upload Template for specific program, log into BEETS.

2. You will be directed to the _Dashboard_ screen (or click on the _Dashboard_ tab if you're already in the system). (A)

3. From the _Bulk Uploader_ widget (or whatever you named it), select the appropriate _Utility_ and _Program_ from the drop downs. (B)

4. A _Select File_ section will appear. Click _browse_ or _Drop a file to attach_ to add the template to the system. (C)

_Continued on next page...._

SOME IMPORTANT THINGS TO NOTE:

- Once in the system, each line item will be split into a separate 'application' in BEETS and will process independently.

- Upon upload, you __will not__ immediately see your data in BEETS as data is updated in the system; see here for timing information.

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Summary of Steps, continued:

5. The file name will appear in the section indicating it is ready for upload. **D**

6. Click on the *Upload File* button (which will now be blue). **E**

7. The confirmation screen below will appear; **do not re-upload if you receive this confirmation as it may result in** duplicate applications in the system.

Continued on next page….

Thank you. Your file has been queued for processing.

‹ Do another Bulk Application Upload
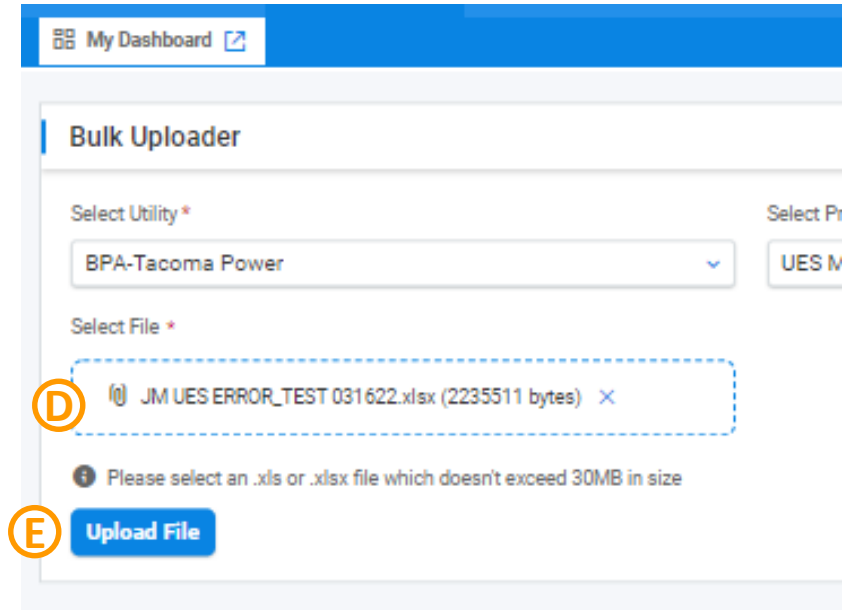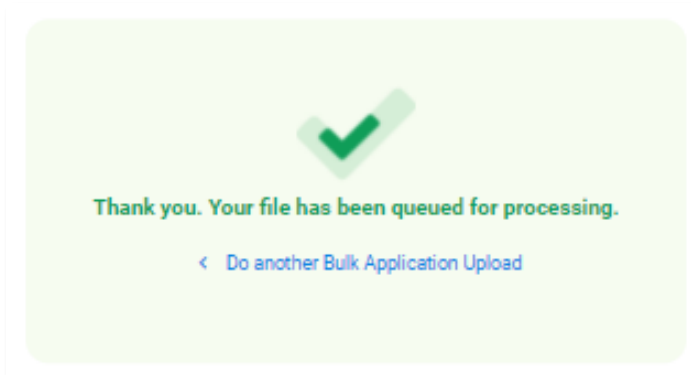
*If you receive the '**File Upload Failed**' error, you may have attempted to upload a duplicate file. If truly not a duplicate, try changing the upload file name and re-uploading.*

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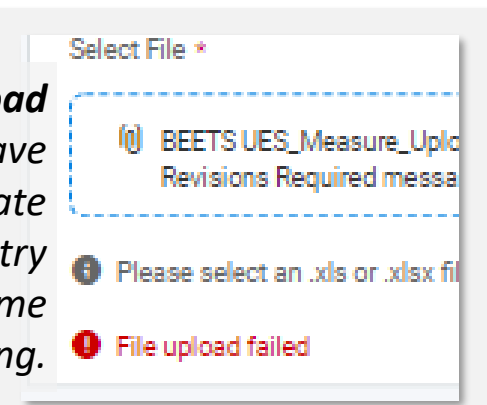
Summary of Steps, continued:

8. Applications are loaded into BEETS in batches and <u>are not immediately viewable in BEETS upon load;</u> <u>t</u>iming on how soon applications will be viewable in the system varies by program.

   - **UES, C2, Non-Reportable and BPA Managed**: loaded 3 – 4 x per day (recommend you check back the next day); Click <u>here</u> for exact timing.

   - **Non-Residential Lighting Calculators**: can take 2 – 3 business days to load; email notification will be sent (pending)

9. After the data is loaded into BEETS, an application is created and viewable in BEETS. Follow instructions <u>here</u> on how to find and access the application.

   - If there are no issues, the application will proceed to BPA for **COMPLIANCE REVIEW**. No further action is needed at this time. (F)

   - If revisions are required, you will receive an email notification indicating changes are need, and your application will move to <u>**REVISIONS REQUIRED**</u> status; log in to BEETS to correct. **END**
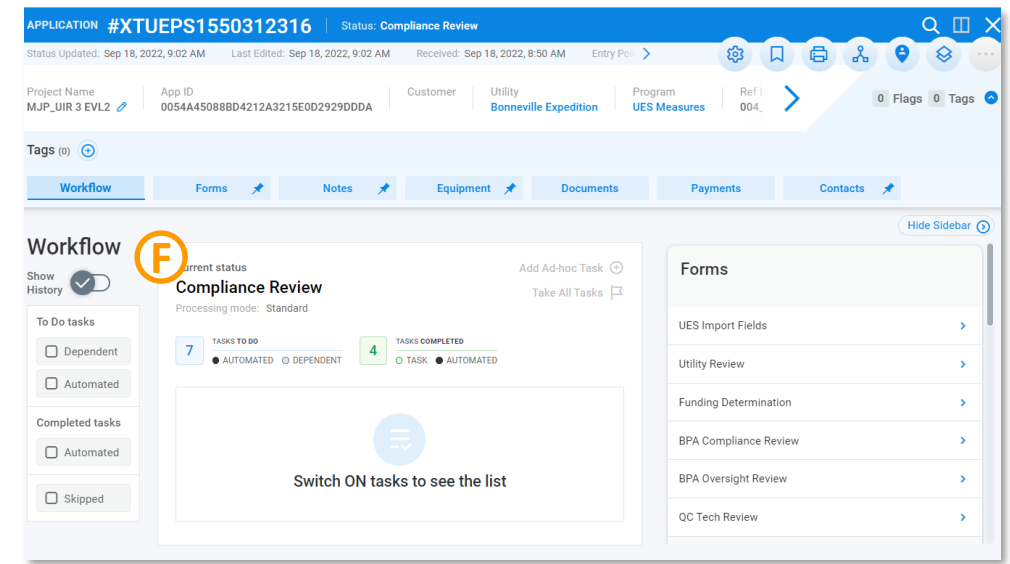

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Application Entry:
Application Entry via Manual Entry

Custom Projects Option 1 (C1), Energy Project Managemer (EPM), Custom Programs, Strategic Energy Management (SEM), Small Compressed Air (SCA), Re-conductor and Transformer Upgrade (RT), and Performance Payments must all be manually entered via the 'New Application' button accessed from the Application Processing tab.

Summary of Steps:

1. Once you Log In to BEETS, click on *Application Processing* tab and click the '*New Application*' tab.

2. Select your Utility from the '*Select Utility'* dropdown. *NOTE: Due to system requirements, all Utilities in BEETS start with the "BPA-" prefix.*

3. Select the appropriate Program from the '*Select Program'* dropdown.

4. Select option that includes "Start Here" 'from the '*Select Application Form'* dropdown. **You must select the option that includes "Start Here" every time you use this manual entry methor to ensure the application is processed correctly.**

5. Click on '*Continue with Creation'* button to create new application.
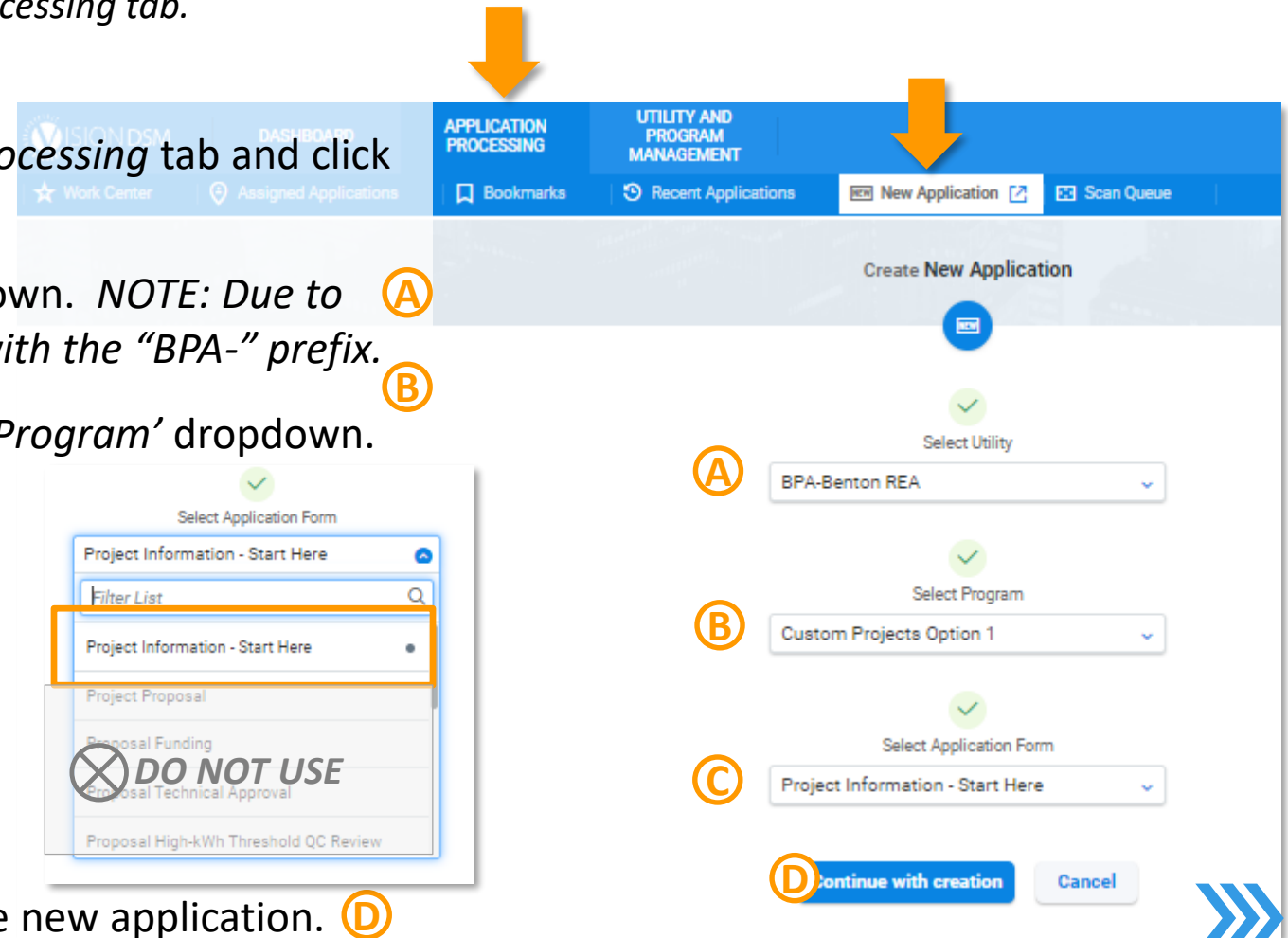
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Summary of Steps, continued:

6. Complete *Customer Search* section:

   a) Enter *First Name/Last Name* (E)

   b) Click *'Search Customer'* button. (F)

   c) If <u>no customer name is found</u>, a new customer will be created. (G)

   d) If a <u>single customer name is found</u>, the customer will be linked to the application (click '*Unlink*' to create a new customer instead)

   e) If multiple customer records are found, click the button and a *'Select Customer Screen'* with appear. (H)

   f) Hover over the record and click the plus symbol to add customer to the application. (I)

   Continued on Next Page….

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Customer Search

ⓘ Please enter Account Number, Email or Last Name to search.

⊗ Ignore; not Functional

Account Number	Email
⊗	⊗

First Name *   Last Name *

(E) Mickey   Mouse

(G) ⚠ Account does not exist as a current customer - one will be created when application is created

(F) Search Customer   ◈ Copy To Premise   **Clear**

First Name *   Last Name *

Jen   Mancke

✓ This customer will be linked to this application. Unlink if you want to create a new customer instead.

✋ Select Customer (H)

✋ Select

	NAME	LASTNAME	CUSTOMER NUMBER	EMAIL	STATUS	⚙
						🔍
	Jen	Mancke	76F1AB89-3DEC-492F-9C...		active	⊕ (I)

Select This Customer

Close

42

Summary of Steps, continued:

7. Scroll down. Complete the *Project Information – Start Here* section; minimal information is completed at this point; fields marked with a red asterisk ***** are required and must be completed to proceed. **J**

8. Scroll down. If desired, click *'Add Equipment'* (i.e. Measures), and/or *'Upload Files'* buttons, but <u>you will have the opportunity to provide this information later in the process.</u> **K**

Continued on Next Page….

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BEETS
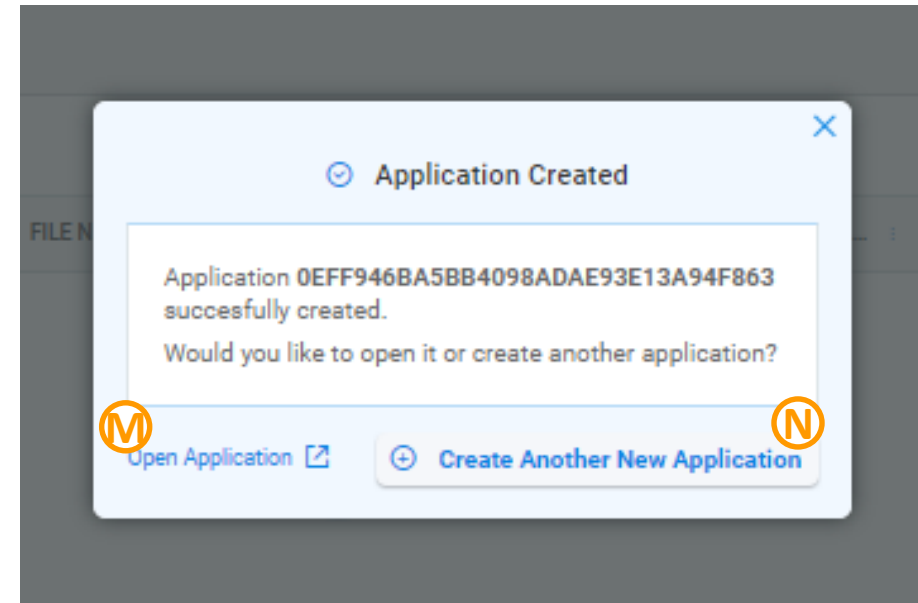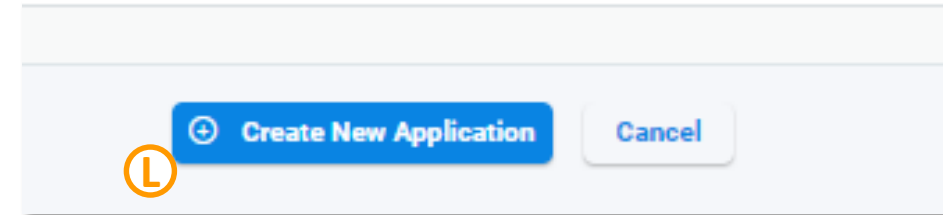BPA Energy Efficiency Tracking System

Summary of Steps, continued:

9. Once all information is provided and all required fields are complete, scroll to the bottom of the application.

10. Click *'Create New Application'* button. Ⓛ

⊕ **Create New Application**   Cancel
Ⓛ

11. An *'Application Created'* confirmation screen will appear:

- Click on *'Open Application'* to view application data. You will be taken to the *Application Page,* or Ⓜ

- Click on *'Create Another New Application'* to start a new application. Ⓝ

END

⊘ Application Created

Application 0EFF946BA5BB4098ADAE93E13A94F863 succesfully created.

Would you like to open it or create another application?

Ⓜ
Open Application ☒   Ⓝ ⊕ Create Another New Application

To learn how to find your application at a later time, reference the *Application Processing* section of this guide.

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Application Processing

Finding, viewing, and processing applications

Application Processing Home Page

The Application Processing page provides access to features allowing you to view and process applications through BEETS. This can be accessed by clicking on the Application Processing tab from the BEETS home page.

Application Processing Options:

- Click on **Work Center** to build and save personalized application filters

- Click on **Bookmarks** to view applications you have bookmarked for easy access

- Click on **Recent Applications** to view applications you personally have recently opened

- Click on **New Application** to start a new application. *NOTE: This option should only be used for programs NOT requiring Bulk Upload Submittal.*

⊗ *Ignore; not Functional*
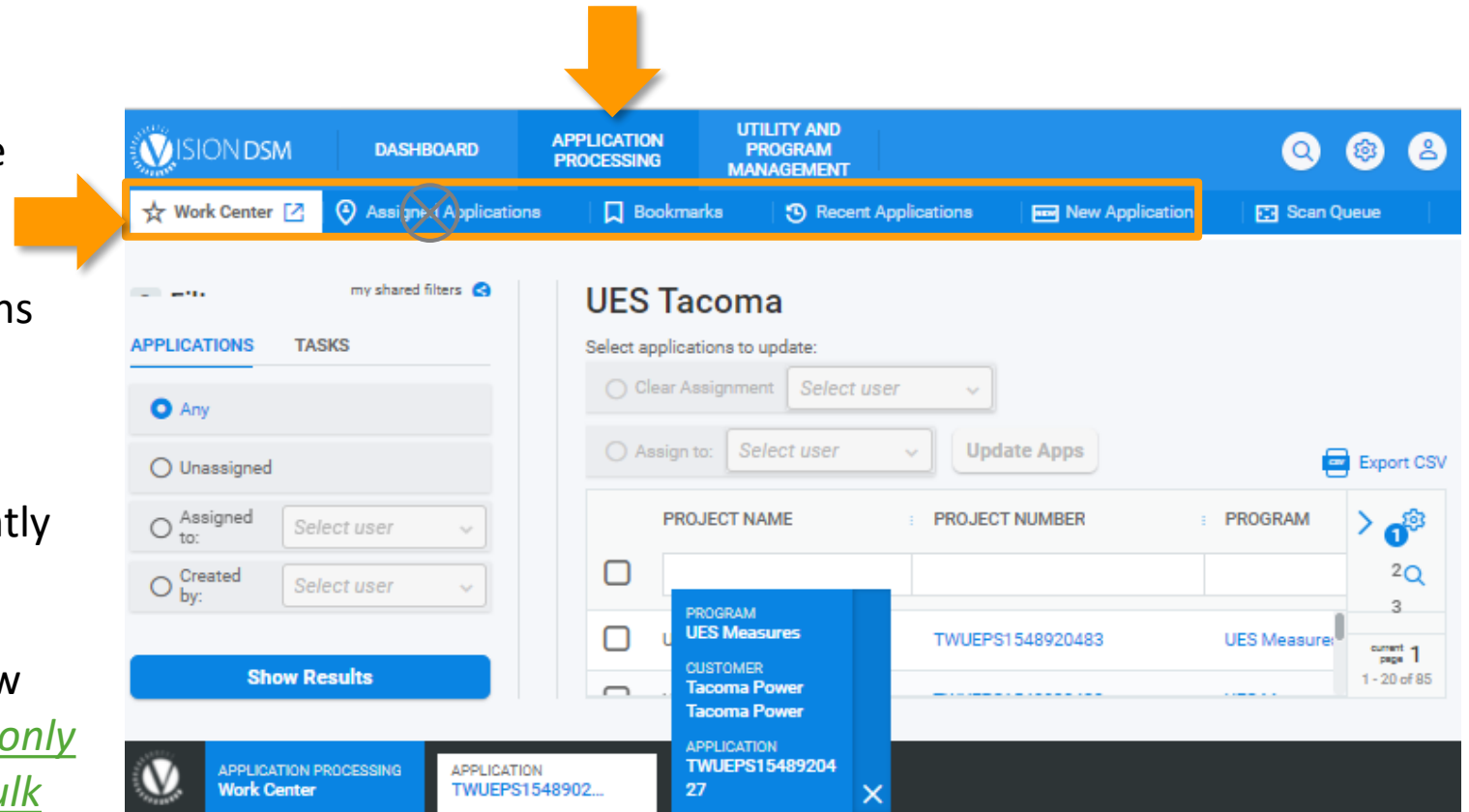
💡 *Every time you open a new application, a 'breadcrumb' will be created at bottom for easy access to multiple applications. Click on tab to open application or **X** to close.*

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Application Processing:
Work Center Filters

Work Center: Finding Applications via Work Center Filters

Work Center is a feature within BEETS that allows users to easily build and save filters to find and access subsets of applications. Some key features are listed below. Continue onto the next pages for more detailed instructions on how to use Work Center.

Further refine filter results by defining criteria in the application fields headings; _be sure to use asterisks before and after search term_ (i.e. *Miller*)

Export search results

*Create **custom filters** based on Utility, Program, and Project Status*

⊗ *Ignore; not Functional*

Configure columns to customize the fields you see

Work Center allows users to create custom application filters based on Utility, Program, and Project Status. These filters will be saved in your account for future use.

Summary of Steps:

1. From BEETS home page, click on *Application Processing* tab; you will automatically be taken to *Work Center*. **A**

2. Click *Add New Filter* text. **B**

3. Select the desired *Utility, Program, and Project Status* from the drop down menus. **C**

4. If desired, click *Add Program to Filter* text to add an additional program and/or Utility to the same filter. **D**

5. Click *Create Filter* button at bottom. **E**

Type into form fields to filter for more specific results.

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Summary of Steps, continued:

6. Enter the *Filter Name* when prompted, and click the *Save* button.

7. You will now see your filter show up on the left under the Work Center tab each time you log in. **F**

8. Click *Show Results* button on bottom left to see results. **G**

END

If you cannot see your filters here after creation, try zooming out using the Ctrl + Minus (-) keyboard shortcuts for a better view.

Click on the blue < icon to hide the filter details from view and expand the search results window.

⊗ *Ignore; not Functional*

Work Center: Filter Options

See below for options available to customize the Work Center filters you created.

Steps to access Work Center Filter Options.

1. From the *Work Center* page, click on the filter you would like to edit or delete.

2. Click on the ⊙ symbol to *Show Filter Details*. Ⓐ

3. You will now have the following options to adjust existing filters: Ⓑ
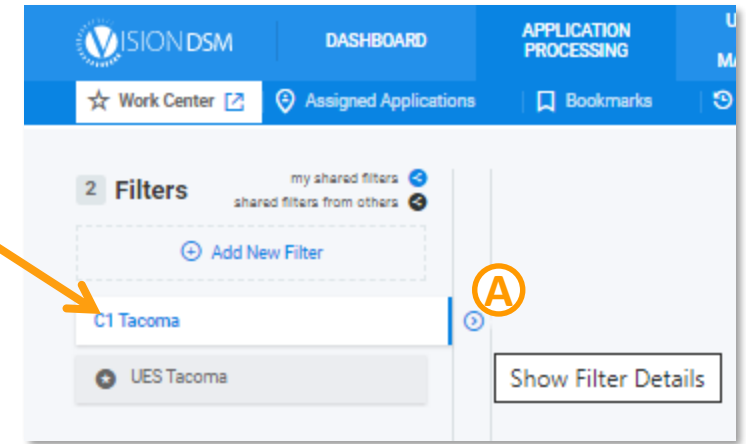
   • **Edit Filter:** Edit existing filters (*see next page for instructions*)

   • ~~Share Filter:~~ *Ignore, not functional*

   • **Delete Filter:** Permanently remove filters.

   • **Set as Starting Page:** Filter will automatically show when you access Work Center.

END

Set as Starting Page

Edit Filter

Filter "UES Tacoma"

Delete Filter

⊗ *Ignore; not Functional*

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Work Center: Editing Filters
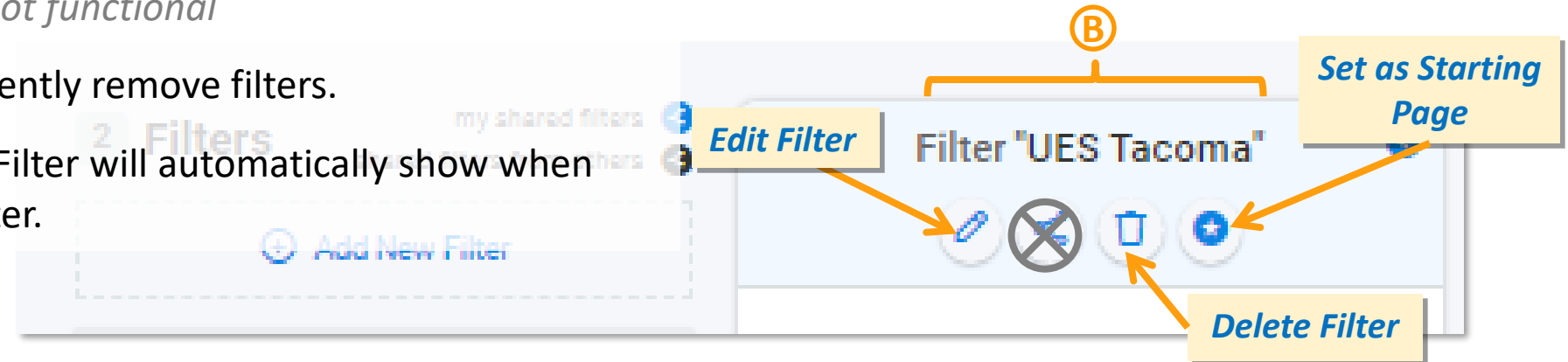
See below for how to edit Work Center Filters you created.

Steps for Editing Filters:

1. From the *Work Center* page, click on the filter you would like to edit.

2. If filter details are not showing, click on the ⊙ symbol to expand details. Ⓐ

3. Click on the ✎ symbol to *Edit Filter*. Ⓑ

4. Make changes to filter as desired, click the *Save* button when complete.

5. A *Save Filter* form will appear; adjust Filter Name (if desired). Ⓒ

6. Select "Save as new filter" to keep previous filter, or "*Update existing filter*" to overwrite.

7. Click *Save*; your filter changes will remain the next time you use it. **END**
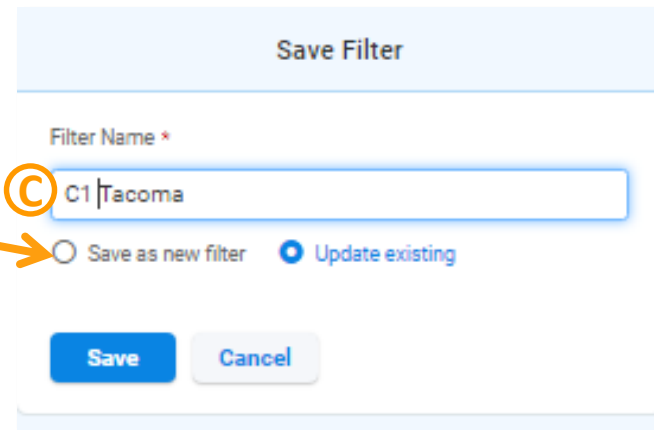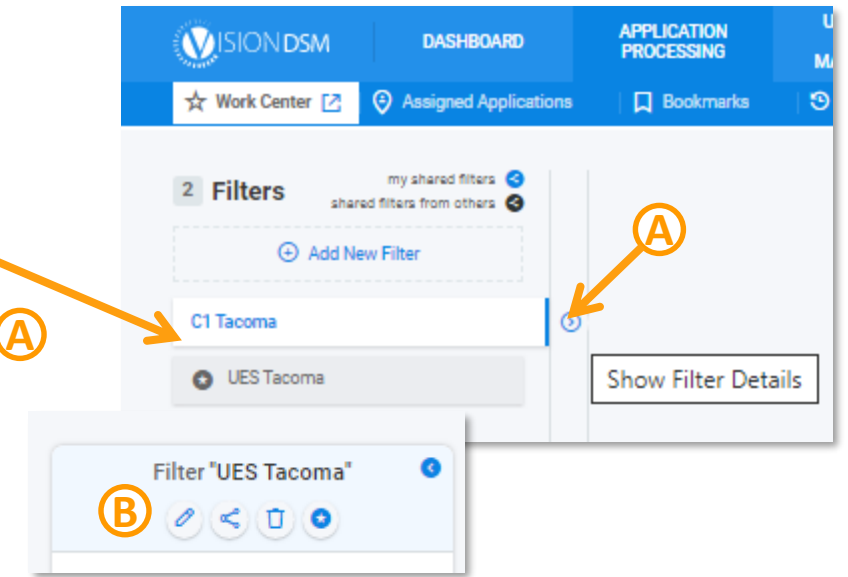
Work Center: Showing Filter Results

After adding creating a filter in Work Center, which is accessible from the Application Tab in BEETS, follow the steps below and show and refine results to easily access applications.

Summary of Steps:

1. From the *Work Center* screen, click on the Filter you would like to run. (A)

2. Click the *Show Results* button on the bottom left. (B)

3. You will now see the filter results to the right. (C)

4. Click on *Project Number* to open application. (D)

END

Also Helpful:
- *How to Refine Work Center Results*
- *How to Customize Work Center View*

Click on the blue < icon to hide the filter details from view and expand the search results window.

Click here to Export a CSV file of the search results.

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Work Center: Refining Results

Learn how to refine your search results in Work Center, which is accessible in the Application Processing tab in BEETS.

Summary of Steps:

1. Enter <u>exact</u> search terms in the header fields, or, **Ⓐ**

2. **!! IMPORTANT !!** Utilize <u>asterisks before and after the search term</u> to broaden search to include results that contain (not just match) the search term. (i.e. *Miller* will expand search to include any results that contain Miller in that field). **Ⓑ**

3. Press *Enter* key on your keyboard to refine results.

4. Click on *Project Number* to go to the application page. **Ⓒ**

If you do not see Project Number in your search result screen, go here to learn how to add columns to your view.

*Optimize your view by double-clicking between the columns (three vertical blue dots) to **Expand Columns,** or click and drag to **Reduce Column Size.***

Select appli...

○ Clear ...   ∨   Update Apps   CSV Export CSV

	PROJECT NAME	⋮	DATECREATED ↑↓	⋮	PROJECT NUMBER	⋮	STATUS	⋮	PREMISE NAME	⋮	ASSIGNED	⋮	TA	⟩	⚙
Ⓐ ☐	*Smith* Ⓑ		🗓		double click to expand the column								×| 🔍
☐	Tacoma_Wx_Self_202		0 AM		Ⓒ TWUEPS1550000...		Ready t...				BURRIDG...		❶
													❷

*Click arrows to **Sort Ascending or Descending.***

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END

Work Center: Customizing View (1 of 2)

BEETS
BPA Energy Efficiency Tracking System

Options to customize your view in Work Center, which is accessible in the Application Processing tab in BEETS.

Optimize your view by double-clicking between the columns (three vertical blue dots) to *Expand Columns,* or click and drag to *Reduce Column Size.*

To *add or remove columns* from your view, click on the blue gear icon at the top of *Configure Column* window will appear. These settings will be saved until you adjust.

Click on the blue arrow to *show or hide filter* details.

Click on the [icon] symbol to the right of the column names to *Show or Hide Column* from results window.

To *reorder columns*, move cursor over the [icon] icon until a hand icon appears, then drag and drop column name to reflect desired order.

See below for some recommended columns that contain helpful application identifiers.

Scroll down to **view more column options**
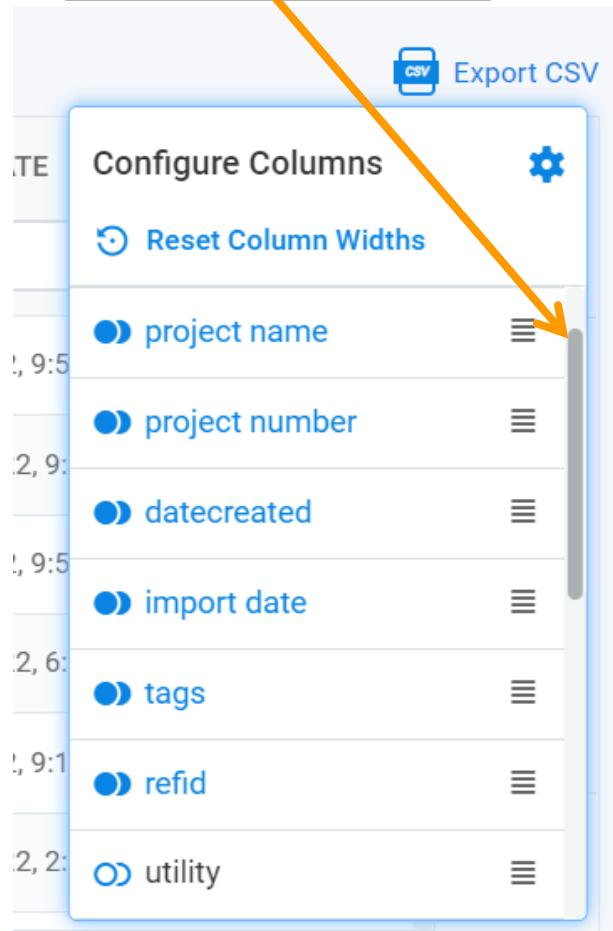
Some Key Recommended Columns:

- **status:** application Workflow status (i.e. where the application is in the process)

- **project name:** user created identifier provided at application entry

- **project number:** system-generated unique identifier (aka application number)

- **datecreated:** date and time application was entered into BEETS

- **import date:** for bulk upload programs, contains date and time the import was picked up by the system

- **tags:** for bulk upload programs (i.e. UES), contains information around revision needed

- **refid:** for UES applications, unique system generated ID containing the following information:

Template line item #	*Measure RefNo*	*Completion Date*	*Upload Date & Time (EST)*
003_	RHVHS1299_	2/17/2022_	032220221150

END

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Application Processing:
Application Page Navigation & Customization

Application Page Navigation

When you open an application, you will be taken to a landing page specific to that particular application. This is where you can navigate around application data, check status, and complete tasks required to move the application forward. The page is segmented into multiple sections. The next few pages dive deeper into how to customize your views and work with applications in BEETS.

Key Sections of Application Page

Application Information Section: *Displays system and user generated data unique to application*

Application Page Options: *Lets users customize page and bookmark, print, share, or copy application.*

Application Data Tabs: *Help you navigate to application data including Forms, Notes, Equipment, and Documents*

Workflow & Tasks Section: *Allows users to view status and perform tasks needed to move application forward.*

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Customizing Your Application Page (1 of 2)

As with many screens in BEETS, the Application Page is highly customizable. See below how to optimize your view.

To **customize which tabs (or Widgets) appear in your view**, click on the blue gear icon in the upper right hand corner of the application page and a **Configure Widgets** screen will appear.

The **tabs** above the workflow give you quick access to various data within the application as categorized by the header.

Click **'For All Programs'** to save these settings across all applications or **'For Current Program'** to save settings for this application only.

Click on the [icon] symbol to the left of the column names to **Show or Hide Widget (or tab)** from application page.

To **reorder columns**, move cursor over the [icon] icon until a hand icon appears, then drag and drop column name to reflect desired order.
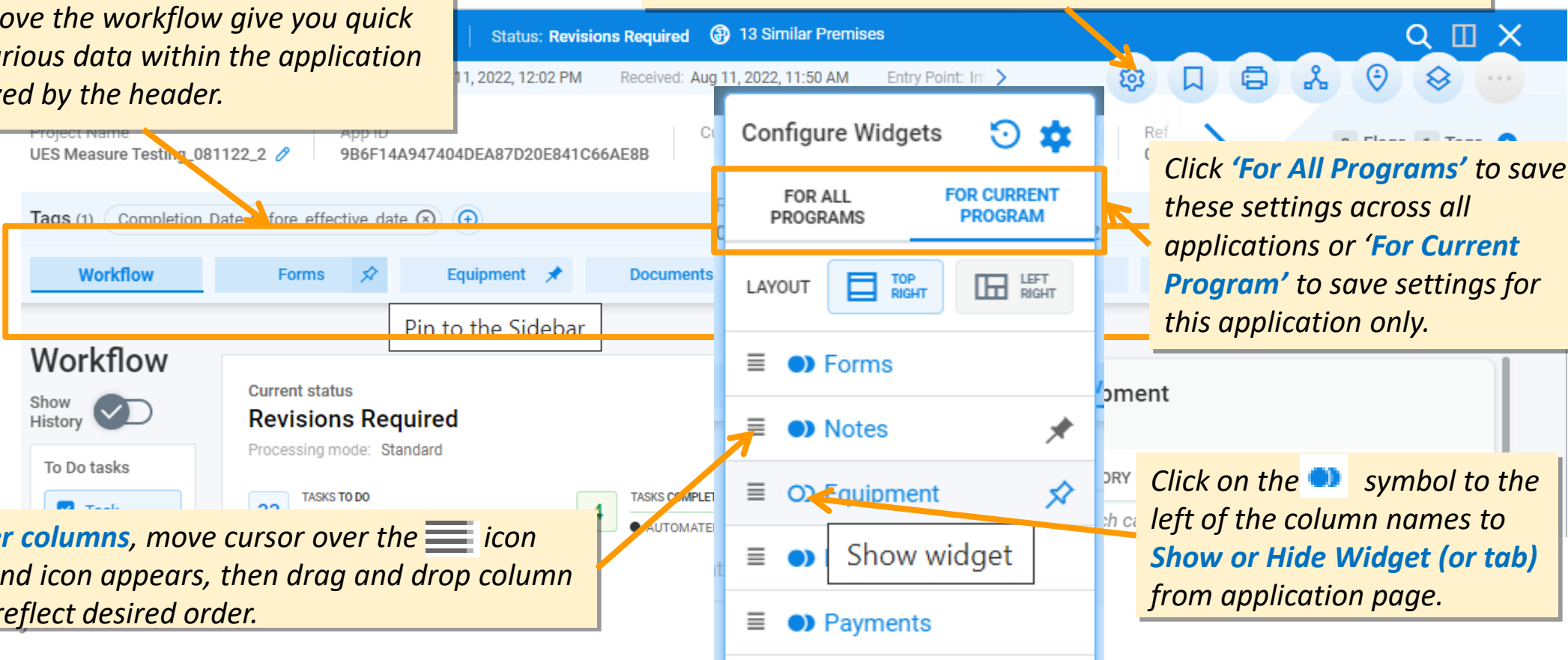
*Click pushpin icon to **Pin (or Unpin) to Sidebar** to have tab information show up in the sidebar to the right. Pinning the Forms tab is particularly helpful for easy access to application data.*

...ions Required   13 Similar Premises

Received: Aug 11, 2022, 11:50 AM   Entry Point: Im

Project Name
UES Measure Testing_081122_2

App ID
9B6F14A947404DEA87D20E841C66AE8B

Customer

Utility
BPA-Expedition

Program
UES Measures

Ref
002

0 Flags   1 Tags

Tags (1)   Completion_Date_before_effective_date

Workflow   Forms   Equipment   Documents   Payments   Contacts   Notes   Location

Pin to the Sidebar

Hide Sidebar

Workflow

Show History

To Do tasks

☑ Task

Current status
Revisions Required
Processing mode: Standard

Add Ad-hoc Task
Take All Tasks

Equipment

33   TASKS TO DO
○ TASK ● AUTOMATED ○ DEPENDENT

4   TASKS COMPLETED
● AUTOMATED

*Click **Hide Sidebar** to collapse sidebar and increase the size of the Workflow screen. Click again to **Show Sidebar.***

END

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Application Page: Application Information Section

BEETS
BPA Energy Efficiency Tracking System

The Application Inform section is at the top of every application page and contains unique application identification data. about the application.
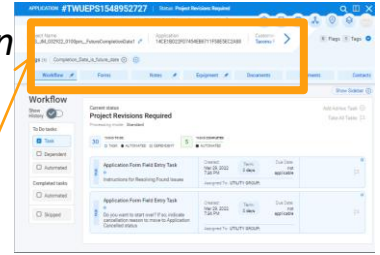
Snapshot to show where on the page the guide is referencing

Application Number *is the unique identifier assigned by the system to this application only.* <u>This field is the best way to</u> *search for your application.*

Time stamps *show date and time of key application actions**

💡 *Click* **>** *to see more data.*

APPLICATION	#TWUEPS1548920424	Status: **Project Revisions Required**	🌐 19 Similar Premises

Status Updated: Mar 22, 2022, 12:41 PM   Last Edited: Mar 22, 2022, 12:41 PM   Received: Mar 22, 2022, 11:50 AM   Entry Point: **Imported**   Entered By: SYSTEM

Project Name
UFG_032222_AM_Invalid RefNo_MANCKE

Application
34364786C84B4417A264A4...

Ignore this application number, less helpful than the one above.

...ower Tacoma Power

Utility
BPA-Tacoma Power

Program
UES Measures

Ref ID
003_RHVHS1299_2/17/2...

Tags (1) Measure_RefNo_invalid ⊗ ⊕

Project Name *is the customizable name assigned by the user during application entry.*

Workflow 📌	Forms	Notes 📌	Equipment 📌

Tags *will note any revisions required*

💡*For* <u>UES applications,</u> *the unique system generated* **Ref ID** *has some useful information to help relate the application back to the upload:*

Template line item #	Measure RefNo	Completion Date	Upload Date & Time (EST)

003_RHVHS1299_2/17/2022_032220221150

*Time will automatically be EST unless you have configured BEETS your local time zone (see BEETS Profile Customization).

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Application Processing:
Completing Tasks and Workflow Steps

Application Page Workflow Overview

The Workflow and Tasks section allows users to check the status of their application and to perform all essential tasks required to move the application forward. Key elements are noted below.

Snapshot to show where on the page the guide is referencing

See **Workflow Status Reference Guide** on the BEETS Training Materials page for more guidance on Workflow status and owners
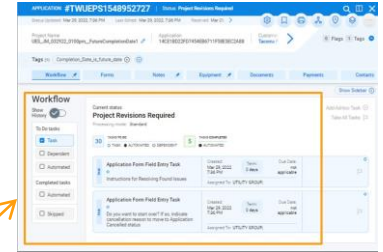
Click on the **Workflow Tab** to navigate back to the Workflow screen.

Tasks are actions that are taken to move application within the Workflow. Click on task to view instructions and/or complete. (See Workflow Tasks for more detail.)

| Workflow 📌 | Forms | ...ments | Payments | Contacts | Location | History 📌 | Events |

Workflow Status tells you where the application is in the process.

Workflow

Show

To Do tasks

☑ Task

☐ Dependent

☐ Automated

Completed tasks

☐ Automated

Task box must be checked for tasks to be viewable

Current status
Project Revisions Required
Processing mode: Standard

27 TASKS TO D... ○ TASK ● AUTOMATED ○ DEPENDENT

8 TASKS COMPLETED ● AUTOMATED

| Application Form Field Entry Task | | Created: Mar 22, 2022 12:42 PM | Term: 0 days | Due Date: not applicable |
| Instructions for Resolving Found Issues | | Assigned To: UTILITY GROUP; | | |

| Application Form Entry Task | | Created: Mar 22, 2022 12:42 PM | Term: 0 days | Due Date: not applicable |
| Update Required Fields | | Assigned To: UTILITY GROUP; | | |

| Application Form Field Entry Task | | Created: Mar 22, 2022 12:42 PM | Term: 0 days | Due Date: not applicable |
| Do you want to start over? If so, indicate cancellation reason to move to Application Cancelled status | | Assigned To: UTILITY GROUP; | | |

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⊗ *Ignore, not helpful*

Application Page Workflow: Task Navigation

BEETS
BPA Energy Efficiency Tracking System

Tasks are assigned to users or user groups when actions are needed to move the application forward. See below for details on what information is included in the Task.

Snapshot to show where on the page the guide is referencing

Task Type: *Detail what type of action can be performed within the task.*

Task Description: *Summary of what info or action is needed.*

Assigned To: *Details which group(s) can complete a task.*

9 TASKS TO DO
◯ TASK ⊗ AUTOMATED ◯ DEPENDENT

2 TASKS COMPLETED
● ⊗ AUTOMATED

Perform Task
0
Add or Update Measures on Project

Created:
Jul 29, 2021
9:49 AM

Term:
0 days

Due Date:
not applicable

Assigned To: BPA CS ENGINEERS; ESI CS ENGINEERS; UTILITY GROUP;

This task is a reminder to review all of your information before you submit.

Please add the measures and equipment to the project if you have not already done so. For this Project Proposal you only ne ESTIMATED values on all measures before continuing to the Proposal. Click on the equipment tab and then click the Add Equi add Equipment to the Proposal. Or click the pencil icon next to existing equipment on the pr

💡 *Click on task for guidance on how to complete.*

☐ I certify that this task is completed

Submit   Cancel

⊗ *Ignore, not helpful*

NOTE: **If you see screen to the right, you have no open tasks to complete**, *and your application has moved forward to the next step in the Workflow.*

Current status
Compliance Initial Review
Processing mode: Standard

Add Ad-hoc Task ⊕
Take All Tasks

7 TASKS TO DO
● AUTOMATED ◯ DEPENDENT

5 TASKS COMPLETED
◯ TASK ● AUTOMATED

Switch ON tasks to see the list

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Application Page Workflow: Task Types

Tasks types indicate what type of action can be performed within the task. Knowing these is helpful in determining if actions can be performed in the Workflow screen, or if user needs to go to another part of the application to complete.

Task Type: Detail what type of action can be performed within the task.

Snapshot to show where on the page the guide is referencing

Common Task Types (FOR REFERENCE ONLY):

1. **Application Form Field Entry Tasks:** Tasks provide guidance on what action needs to be taken, but users will need to leave the Workflow screen to complete.

2. **Application Form Entry Tasks:** Tasks with pop-up forms that allow you to perform actions in Workflow window.

3. **Perform Tasks:** Tasks in which you confirm that all required information has been provided. Click on task to certify, submit, and move forward to the next step.

4. **Document Upload Task:** Assigned when documents are needed. Click on task and an document upload screen will appear.

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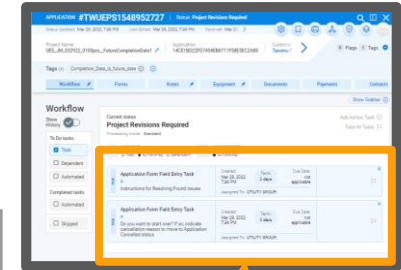
Application Page Workflow: Completing Tasks

Users must complete assigned tasks to move the application forward in the Workflow.

Summary of Steps to Complete Tasks:

1. Click on first task in Workflow. **Ⓐ**

2. If *instructions* appear, review and complete action(s) as requested. **Ⓑ**

3. If a *form* appears, complete inputs as requested from the Workflow screen.

4. Once complete, from the *Workflow* screen, click on the task again, and click *Save* to close task. **Ⓒ**

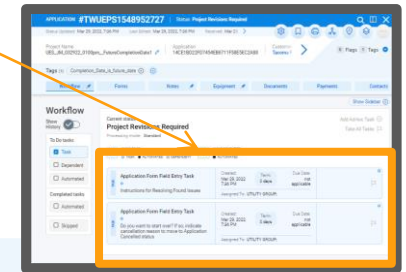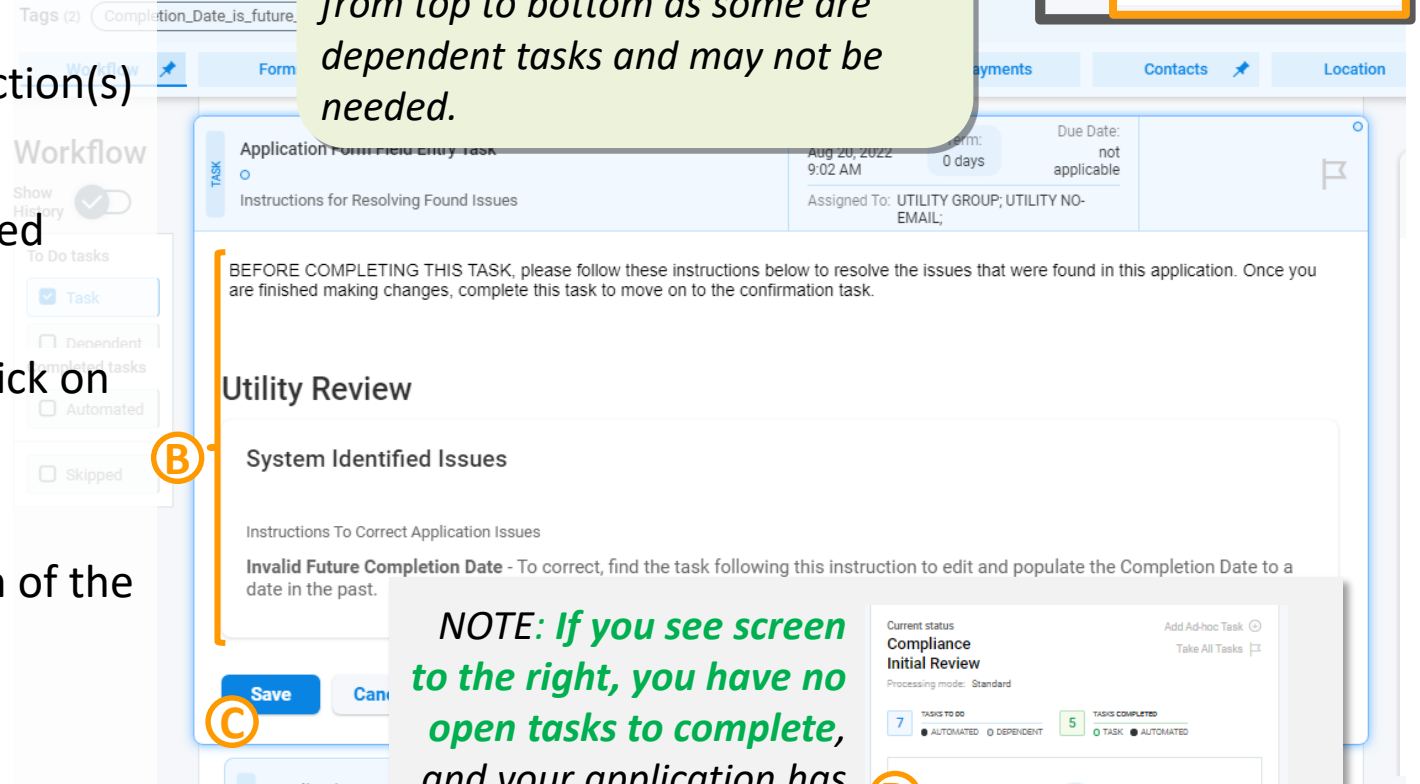5. The Workflow engine will run and a green confirmation notice will appear at the bottom of the screen; the task will disappear if complete.

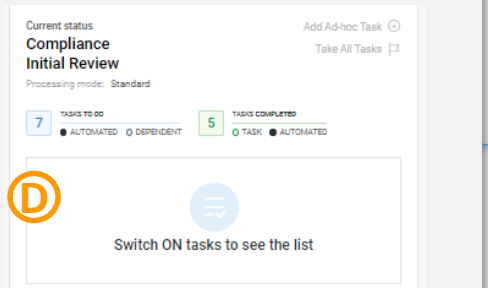6. Complete any remaining tasks in the Workflow screen until you have no tasks left. **Ⓓ**

END

💡 *If you have multiple tasks in your Workflow, work through them from top to bottom as some are dependent tasks and may not be needed.*

Workflow

Show History

To Do tasks
- ☑ Task
- ☐ Dependent
  completed tasks
- ☐ Automated
- ☐ Skipped

Application Form Field Entry Task
Instructions for Resolving Found Issues

Aug 20, 2022 9:02 AM | Form: 0 days | Due Date: not applicable
Assigned To: UTILITY GROUP; UTILITY NO-EMAIL;

BEFORE COMPLETING THIS TASK, please follow these instructions below to resolve the issues that were found in this application. Once you are finished making changes, complete this task to move on to the confirmation task.

Utility Review

System Identified Issues

Instructions To Correct Application Issues

Invalid Future Completion Date - To correct, find the task following this instruction to edit and populate the Completion Date to a date in the past.

Ⓑ

Save   Cancel   **Ⓒ**

Task successfully updated ✕

*NOTE: **If you see screen to the right, you have no open tasks to complete**, and your application has progressed to the next step in the Workflow.*

Current status
Compliance
Initial Review
Processing mode: Standard

7 | TASKS TO DO
● AUTOMATED ○ DEPENDENT

5 | TASKS COMPLETED
○ TASK ● AUTOMATED

Switch ON tasks to see the list

Ⓓ

Application Processing:
Viewing & Editing Application Data

Application Page: Accessing Application Data via the Forms Tab

BEETS
BPA Energy Efficiency Tracking System

Application data is stored in 'Forms' in BEETS. These forms vary by program and can only be edited by the user group that is assigned to that specific Form (i.e. Utility, COTR, QC Engineer, etc.) See Common Form Types on next page for more information on owner and purpose of common Forms.

Snapshot to show where on the page the guide is referencing

APPLICATION #XTUEPS1550523694 | Status: **Revisions Required** | 5 Similar Premises

Status Updated

Received: Oct 17, 2022, 2:50 PM | Entry Point: Imported | Entered By: SYSTEM

Click on the *Forms Tab* to view application data.

Project Name:
Villalobos_EER Practice 10_17... ...04C1C0A21A0B4DEC8DC9B25B57BF30F6 ...8_7/22/

0 Flags 2 Tags

💡 *Hover over Forms tab and click on 📌 to pin Forms tab to Sidebar for an easier viewing and access*

Tags (2) Model_Missing ⊗ ...d_Cost_Missing ⊗ ⊕

| Workflow | **Forms** 📌 | Notes 📌 | Equipment | Documents | Payments | Contacts |

Hide Sidebar ⊙

Forms

| UES IMPORT FIELDS | UTILITY REVIEW ⊘ | FUNDING DETERMINATION | BPA COMPLIANCE REVIEW | BPA OVERSIGHT | › |

ℹ Highlighted fields marked with ⊘ are administrative and are not shown to all users.

UES Import Fields

Click on each *Form* to view different data inputs entered at different points in the application process.

💡 *The ⊘ symbol indicates that the form is view only and cannot be edited at that point.*

Forms

UES Import Fields	›
Utility Review	›
	›
	›

Click on › to view more Forms.

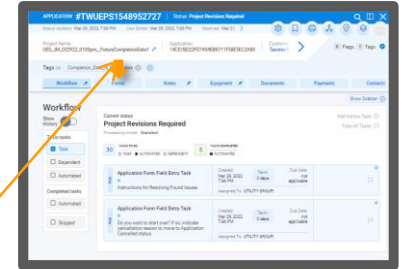| BPA Oversight Review | › |
| QC Tech Review | › |

Form: UES Import Fields ✏ **Edit Form**

At different points in the process, form owners will be allowed to edit data by clicking on the *Edit Form* button.
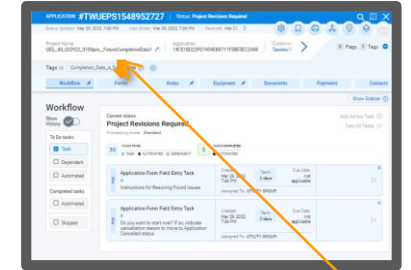
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Application Page: Common Form Types (1 of 2)
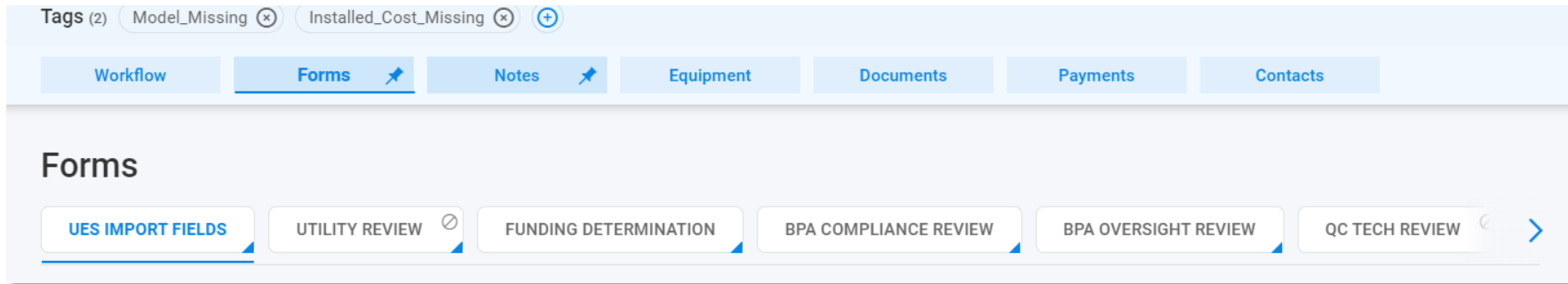
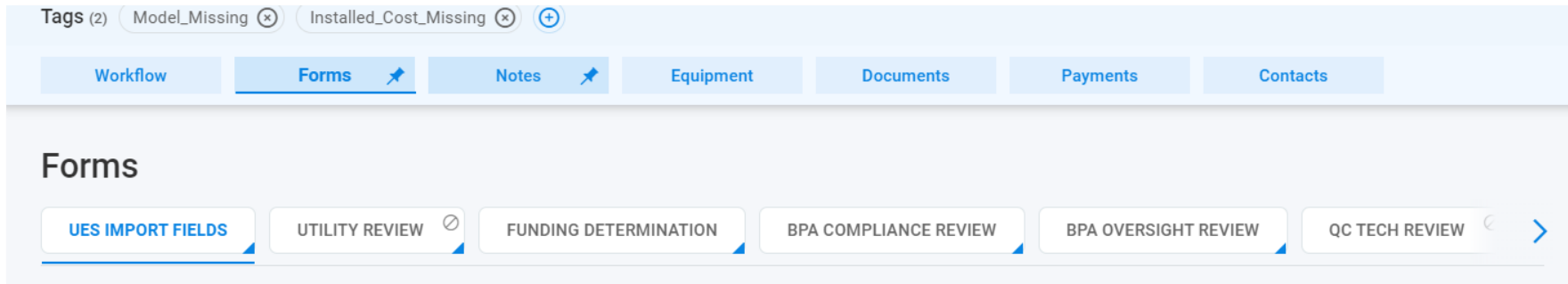*Snapshot to show where on the page the guide is referencing*

Some common 'Forms' are described below. The Form names vary slightly by program but generally follow a common naming convention:

- **Import Fields Forms (i.e. UES, LC):** Contains a majority of the *descriptive application data* submitted by utility via <u>bulk upload</u> including project name, completion date, address, etc. *OR*

- **'Start Here' Forms (i.e. Project Information – Start Here):** Contain a majority of the *descriptive application data* submitted by utility via <u>manual entry</u> including project name, completion date, company and facility address, etc.

- **Utility Review Forms:** Auto-populated reference formf that displays various <u>system identified issues</u> within application (i.e. revisions required, duplicates, address validation, etc.)

- **Funding Forms (I.e. Funding Determination, Completion Funding, etc.):** Auto-populated forms containing *estimated savings and payment information* based on EEI% provided by utility.
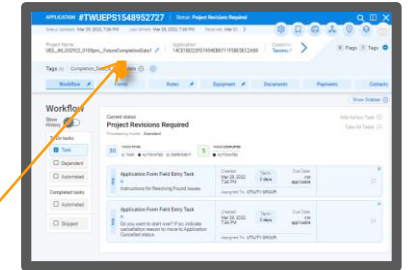
Continued on next page….

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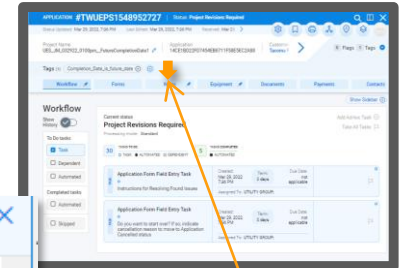*Snapshot to show where on the page the guide is referencing*

Continued from previous page:

- **BPA Compliance & Oversight Review Forms:** Forms completed by COTR that contain compliance and oversight approval comments and information.

- **QC Review Forms:** Forms completed by the BPA QC Engineer that contain technical review approval comments and information.

- **Technical Review Forms:** Completed by ESI CSE (ESIP) or BPA CSE that contain technical review approval comments and information.

END

Application Page: Adding Notes

Notes allow users to add additional commentary to the application. NOTE: These notes *are not* personal and will be viewable by all individuals involved in the application processing.

Click on the Notes tab to view or add notes.

Click Add Note to add new note.

Snapshot to show where on the page the guide is referencing

Click Export CSV to export note details.

Click to Edit (or View) Note.

Click on ⚙ to hide, unhide or reorder columns from Notes window.

!!IMPORTANT!!: *All notes can be viewed and/or edited by any user that has access to application, regardless of if it is marked public or private*

ADD NOTE

Note *

B I U S | ∞ ∞ | ≔ ≔

body

Note Type *
○ private ● public

Save | Cancel

Application Page: Equipment (i.e. Measures) Tab Navigation

The Equipment (i.e. Measure) tab is where application Measure information is stored and can be viewed or edited.

💡 *For more guidance on how to add or edit equipment, see Add Equipment or Edit Equipment.*

Snapshot to show where on the page the guide is referencing

*Click on the **Equipment Tab** to view or add measures.*

*Click **Export CSV** to export measure details.*

*The **REFID** listed here is a unique system assigned identifier and is only relevant for UES applications (where it includes the Measure RefNo).*

*Click **Add Equipment** to add new measures.*

Click on ⚙ to hide, unhide or reorder columns.

*Click **Compare Equipment** to view measure details. NOTE: check box must be checked.*

*Click to **Delete Equipment***

*Click to **Edit Equipment** (or **View Equipment** details)*

*Click to **Clone Equipment** (i.e. duplicate)*

⊗ *Not applicable to BEETS end users.*

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BEETS
BPA Energy Efficiency Tracking System

From the Application Page, follow the steps below to add new equipment (i.e. measures) to your application. This part of the system is particularly constrained by the of-the-shelf dependency, so please follow the instructions carefully.

Summary of Steps:

PREP: Have the Measure RefNo from the approved measure list ready.

1. From the *Workflow* screen, click on the *Equipment* tab.

2. Click on the *Add Equipment* text. **NOTE: Some Programs have an 'Add Approved Equipment'** ⒶA **option. Do not use this option; it doesn't work**.

3. Select the appropriate equipment type from the drop down selection(s). ⒷB

4. Click on the *Apply Approved Equipment* button at the top of the '*Add Equipment'* screen that appears. ⒸC

Continued on next page...

APPLICATION **#Y4UEPS1550350641** | Status: **Revisions Required**

Status Updated: Sep 28, 2022, 9:39 AM   Last Edited: Sep 28, 2022, 9:39 AM   Received: Sep 28, 2022, 8:50 AM   Entry Point: Imported

Project Name   App ID
sdfsdf ✎   B13BBFDA9BFB4A1188863C10D104E99D

Customer   Utility **BPA-Snohomish**   Program **UES Measures**   Ref ID 001_AIRHA40

Tags (2)   Missing_or_Invalid_Premise_Address ⊗   Measure_RefNo_invalid ⊗

Workflow | Forms 📌 | Notes | **Equipment** | Documents | Payments

Equipment

🖨 Export CSV

Select Equipment   ⊞ Compare Equipment   🗑 Delete Equipment   Add Approved Equipment ⊕   Add Equipment ⊕ ⒶA

PRODUCT CATEGORY | NAME | REFID | DATE ENTE ⚙

⊕ ADD EQUIPMENT ✕

ALL   RECENTLY USED   MOST COMMON   ⒷB   [search] 🔍

Home categories > UES >

Other	>	UES - Agriculture
UES	>	UES - All
		UES - Commercial ⊕
		UES - Industrial

Add Equipment

⊗ *Do not use, not functional*

✕   ⊕ Add Equipment   ⒸC **Apply Approved Equipment**

BPA REFERENCE NUMBER

[ ]

Please select from the Approved Measure List above to select a reference number

Category **UES**

Summary of Steps, continued:

5. Select the *Measure Type* from the drop down (frequently only one option). **(D)**

6. Paste the valid **Measure RefNo** from the approved UES measure list in the *Ref ID* field. *NOTE: The measure search functionality within BEETS is not robust so we do not recommend searching using BEETS to find a RefNo.* **(E)**

7. Click the blue *Search* button to view selection. **(F)**

8. The measure you inputted will appear; hover to the right and click *'Apply Approved Equipment'* to select this measure (or click *View Equipment* to view measure details). **(G)**

Continued on next page…

⊗ *Do not use, not functional.*

Measure Type * **(D)**
BPA_UES
BPA_UES

Ref.ID **(E)**
AMDMO40060

Manufacturer ⊗

Model ⊗

Search   Reset **(F)**

ROWID	REFID	MANF	MODELNUM
64	AMDMO40060	Motor Rewind	Motor Rewind

Apply Approved Equipment **(G)**

Apply Approved Equipment

Summary of Steps, continued:

9. A new *'Add or Edit Equipment'* screen with the measure information will appear. **H**

10. Scroll down to view measure details, and click the blue *Add Equipment* button to add the measure to the application. **I**

11. The *Equipment* screen will appear with the new measure listed, indicating that the measure has been added to the application. **J**

12. Return to the *Workflow* screen to complete any remaining tasks (as applicable).

END

Add Equipment

Category
UES

Name
UES - All

Quantity *
1

H

Apply Approved Equipment

ROW NUMBER

BPA REFERENCE NUMBER
AMDMO40060
Please select from the Approved Measure List above to select a reference number.

MEASURE NAME
Motor Rewind Horsepower 4500

SECTOR
Agricultural

HEATING ZONE
All Heating Zones

COOLING ZONE
All Cooling Zones

UNIT TYPE OF SAVINGS/PAYMENT

(e.g. per Square Foot of window replaced)

COMPLETION DATE

I ⊕ Add Equipment   Cancel

Equipment

Export CSV

Select Equipment | Compare Equipment | Delete Equipment | Upload Equipment ↑ | Add Equipment ⊕

CATALOG ID	PRODUCT CATEGORY	NAME	REFID	DATE ENTERED	QUANTITY
67690	UES	UES - All **J**	495D5E6C-274...	Jun 20, 2022, 6:45 AM	1

current page 1
1 - 1 of 1

Application Page: Editing Equipment (i.e. Measures)

NOTE: *If you are editing equipment as a result of an invalid refno, visit <u>here</u> for more detailed instructions.*

To Edit Equipment:

1. Click on the *Equipment* tab.

2. Hover to the right of the measure in the *Equipment screen*; some icons will appear.

3. Click *Edit* icon (i.e. pencil). **A**

4. The *'Edit Equipment'* screen will appear. **B**

5. Click *'Apply Approved Equipment'* to input a new measure. **C**

6. Proceed with <u>Step 5 of the Add New Equipment Instructions</u>.

END

Application Page: Deleting Equipment (i.e. Measures)

BEETS
BPA Energy Efficiency Tracking System

To Delete Equipment:

1. From the *Application Page,* click on the *Equipment* tab.

2. Hover to the right of the measure in the *Equipment screen*; some icons will appear. (A)

3. Click *Delete* icon (i.e. garbage can). (B)

4. Click *Yes* to confirm you want to delete equipment. (C)
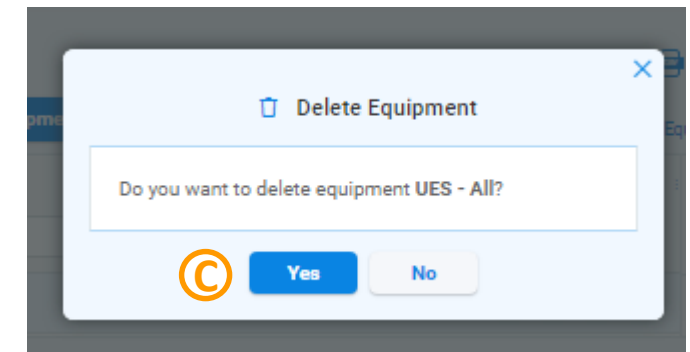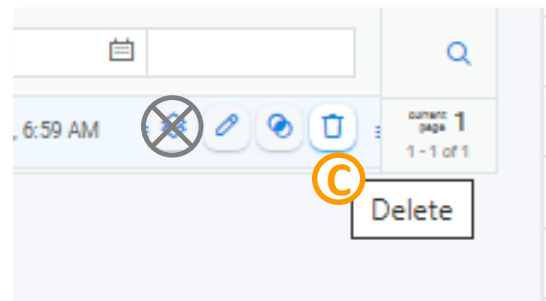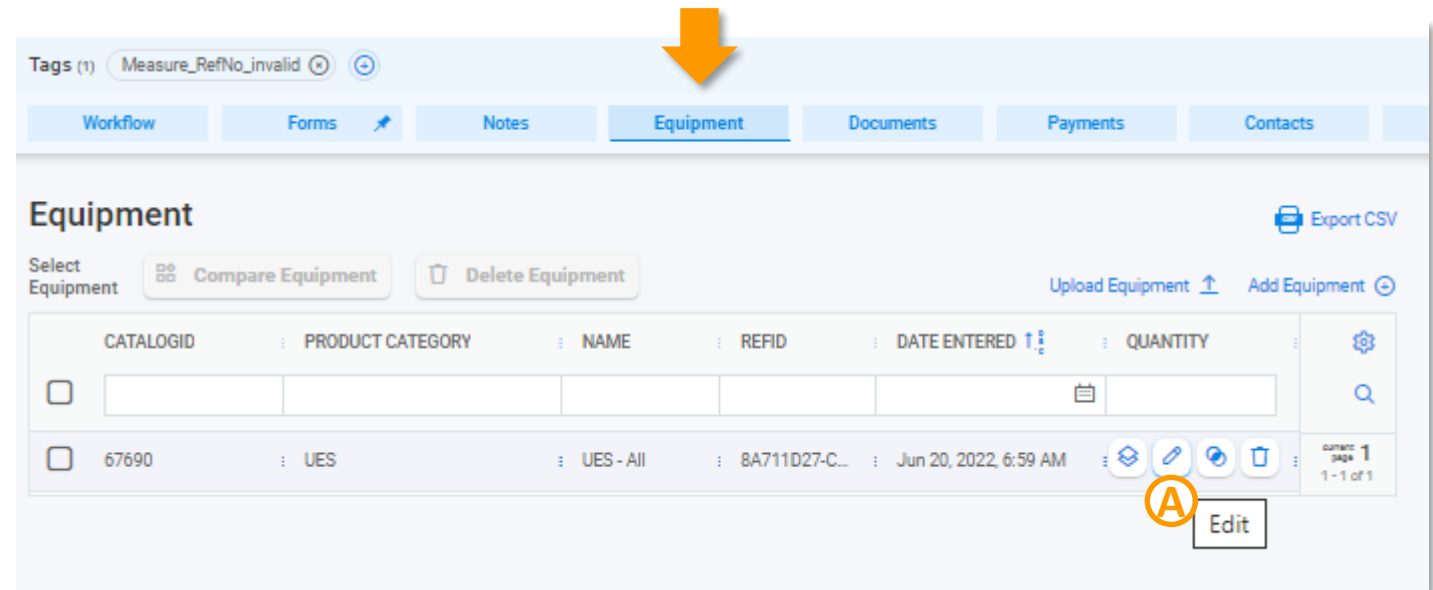
⊗ *Do not use, not functional.*

Application Page: Viewing Equipment Information (i.e. Measures)

From the Application Page, follow the steps below to view, edit or delete equipment that has been added to an application. This part of the system is particularly constrained by the off-the-shelf dependency, so please follow the instructions carefully.

Summary of Steps:

1. Click on the *Equipment* tab.

2. Check the box to the left of the measure. Ⓐ

3. Click *Compare Equipment* button. Ⓑ

4. The measure details will appear in a new screen. Ⓒ

5. Click *Close* button to return to the equipment screen. Ⓓ

END

💡 *Check or Uncheck to **view or hide** data.*

Application Page: Uploading or Viewing Documents (1 of 2)

BEETS
BPA Energy Efficiency Tracking System

The Documents Tab is where customers can load supporting documentation for the application; these documents are viewable by all users who have access to the application (unless Restricted Access is defined, see next page). Customers can load documentation at any time during the application process. NOTE: This is the method used to upload *oversight* documentation.
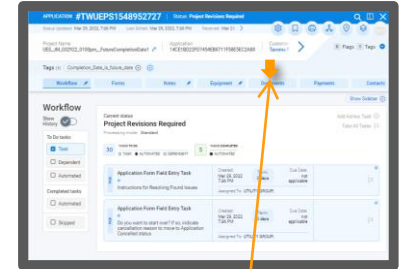
Snapshot to show where on the page the guide is referencing

*Click on the **Documents Tab** to view or add documents related to app*

*Click to **Upload Files;** the filed upload form will appear (see next page)*

Status Updated: Apr 15, 2022, 3:02 PM   Last Edited: Apr 15, 2022, 3:02 PM   Received: A...

Project Name
UES_PEK_040522_1100am__Mancke_3_DUPE_041522_9am ✏️

Application
05ADDD9C0E3A48...

0 Flags   1 Tags

Tags (1)   Unique_Site_ID_Missing ⊗   ⊕

| Workflow | Form... | ...ment | Documents | Payments |

*Click on **Correspondence** to view app notifications sent via email*

Documents

TYPE	:	CONTENT	:	ITEM	:	RECIPIENT
✉️		Apr-15 2022 Pr...		Notification to Utility ...		UTILITY GROUP;

FILES   **CORRESPONDE**

...d Files ⬆️   Download All ⬇️   🖨️ Export CSV

DATE ↑	:	FILE ID	:	FILE NAME	:	FILE ACCESS	:	FILE SECURITY	:	FILE TYPE	>	⚙️
📁 FILES											⬇️	🔄
Apr 19, 2022 ...		9399FC50-F88...	📄	lighting_invoice_temp	👤	All Access						

*Click to **Download All Documents** into a zip file.*

💡 *If documents have been loaded, this **FILES** icon will appear. Click on this to expand and view documents.*

navigation
Continued on next page... »»»

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BEETS
BPA Energy Efficiency Tracking System

Continued from previous page….

NOTE: File Upload Options may vary slightly depending on the program.

FILE UPLOAD

Files *

⬆ Drop files to attach, or browse

Drag and Drop files or Browse to upload here.

9A8DDF07EB99B0   0 Flags   1 Tags

Documents   Payments   Contact

Click to Upload Files; the file upload form will appear

Folder *

FILES

Folder defaulted to Files, no other option.

File Type *

Select File Type for your reference.

Tags

ADD NEW   SELECT FROM EXISTING

Add personalized Tags to help identify or categorize documents.

Upload Files ⬇   Download All ⬇   Export CSV

File Access *

Public

⊗ *File Access Not Functional; select any option.*

FILE SECURITY   FILE TYPE   > ⚙

⬇   C

File Security *

All Access   ⬆

All Access

Restricted Access

All Access   Supporting Doc

File Security determines who can view document; select Restricted Access to limit access to those with sensitive document privileges for a specific utility.

Click Upload to Upload Docs – will then appear in FILES list

Upload   Cancel

END

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Application Page: Payments Tab

The application payments tab displays the EEI payment and status of payment for that specific application. See Invoicing and Performance Payment Guide for more information around how payment processing works in BEETS.

Tags (1) oversight_conducted ⊗ ⊕

| Workflow | Forms 📌 | Equipment 📌 | Documents 📌 | **Payments** | Contacts |

EEI Payment Amount; populated when application moved to READY TO INVOICE status.

Populated with payment information after payment is processed by BPA.

Payments

⊗ *Ignore, not in use.*

$861.70 Total Payment Available $0.00 Total Payment Remaining

Payee:
Expedition Power

Payment Type: Check Payment

Check Date: Check #:   Check Amount:
-                    -   -

Invoice Date: Invoice #:
-                    -

Payment Status:
- **Entered & Approved:** *Date that application approved by BPA (i.e. moved to Ready to Invoice)*
- **Committed:** *Date the customer approved invoice for payment.*

Entered:
Aug 11, 2022, 5:46 AM
Approved:
Aug 11, 2022, 5:46 AM
Committed:
Aug 18, 2022, 5:50 AM
Status:
Rebate Approved

Amount:
$861.70

81

Application Page: Adding or Viewing Contacts

The Contacts Tab holds the contact information of various locations associated with an application. This contact information is populated at application entry.

APPLICATION #TWUEPS1549252010 | Status: **Project Revisions Required** | 22 Similar Premises

Status Updated: Apr 25, 2022, 4:12 PM   Last Edited: Apr 25, 2022, 4:12 PM   Received: Apr 25, 2022, 2:50 PM

*Click on the **Contacts Tab** to view contacts assigned to this application.*

__Primary Contact Card__ is auto-populated by BEETS with the utility contact information associated with the application. BEETS.

***DO NOT EDIT CONTACTS IN THE CONTACT SCREEN;** this can cause unnecessary errors to be triggered. Contacts should instead be edited in the __FORMS__ tab.*

PRIMARY
Tacoma Power Tacoma Power

Company:	Tacoma Power
Contact Title:	Primary
Address:	PO BOX 11007, TACOMA, WA, 98411
Account #:	10370
Premise #:	-
Workflow Group:	-

PREMISE
JM Prime

Company:	JM Prime
Contact Title:	Premise
Address:	2232 NE 19th Ave., Portland, OR, 97212
Account #:	-
Premise #:	32132
Workflow Group:	-

CONTRACTOR

No contact assigned.
Assign contact from the Other Contacts list or Create new.

__Premise Contact Card__ holds the contact information of the location of the project or where the measure is installed.

Not applicable to BEETS end users.

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Application Page: Other Tabs (Location, History, Events, QC)

Some additional tabs are available, but have less relevance to BPA customers. If not helpful to you personally, we recommend you hide these tabs.

If desired, click on gear icon to hide unused tabs.
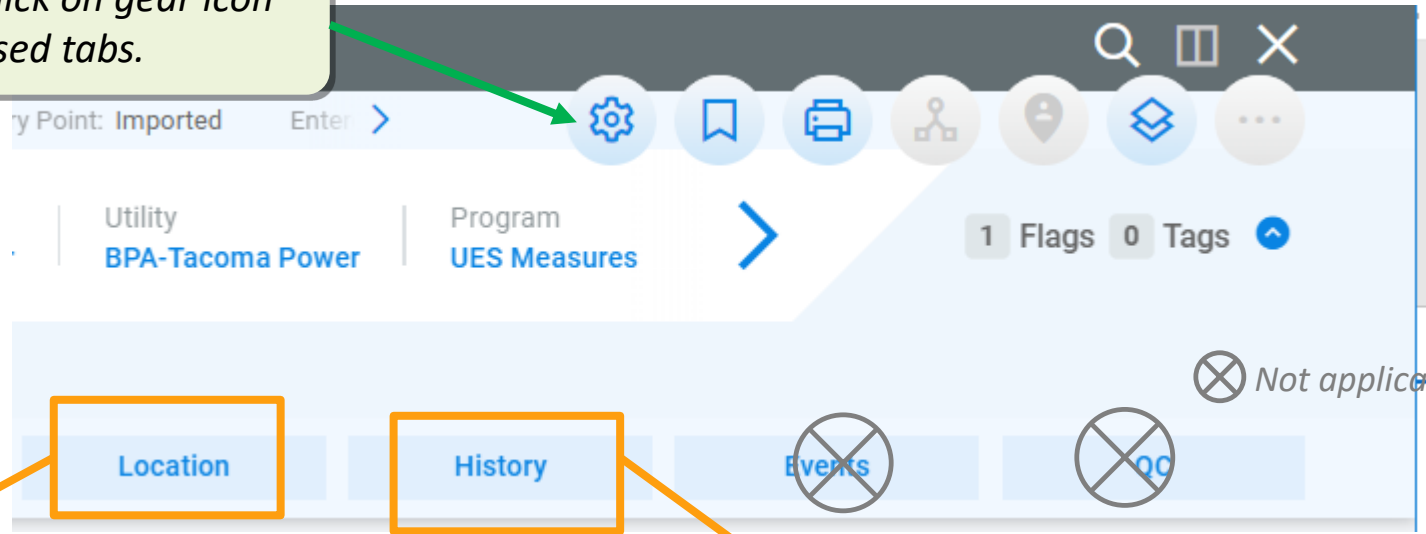
⊗ *Not applicable to BEETS end users.*

Location shows address information around the premise associated with the application
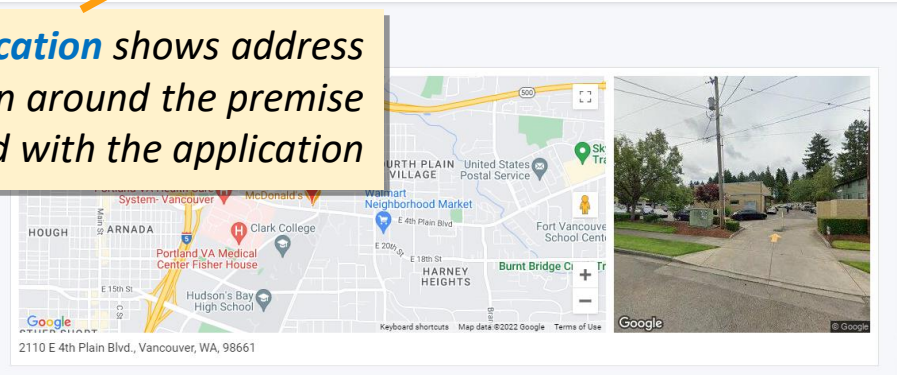
History shows activity associated with that specific action; typically used by system administrators to help troubleshoot

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Common Revisions Required

Correcting common errors to move application forward

Revisions Required Workflow Status Overview

'Revisions Required' is a Workflow status that is owned by the user who is submitting the application (i.e. project or measure) to BPA. This status is triggered when additional information or revisions are needed before the application can proceed to BPA review. While this status can be found in any of the programs, it is typically triggered in the Bulk Upload programs as part of the initial data validation performed by BEETS. ***Users will be notified of any revisions needed via email.***
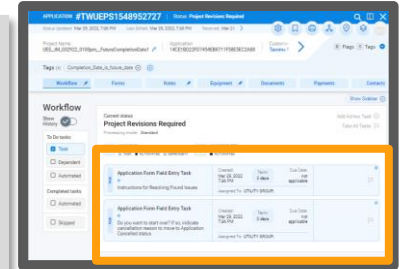
Snapshot to show where on the page the guide is referencing

Common Revisions Required (click on each for instructions on how to correct):

- **Invalid or Missing RefNo** – Measure RefNo not identified by BEETS

- **Duplicate Applications** – Multiple potential duplicate application has been identified

- **Invalid Address** – Premise address provided does not match one in the USPS database

- **Missing Required Fields** – Required data is missing from the application.

Revisions Required:
Invalid or Missing RefNo

Most programs in BEETS will require inclusion of a measure (or Equipment) with the application. If an application does not include a valid measure, BEETS will create a task in the REVISIONS REQUIRED workflow status for the user to correct.

Summary for Steps:

1. User will receive notification via email that the application has a missing or invalid Refno.

Hello,

BPA has returned the project named Valid Expired 0331 No Previous_081911 with Project #: XTUEPS1550094638 during compliance review. The reason(s) for this are:

- **Missing or Invalid RefNo** - To correct, identify a valid RefNo from the UES Measure list. Then, from the Equipment tab: click Edit Equipment > Apply Approved Equipment > paste correct RefNo in RefID field > Search > (+) Apply Approved Equipment > Save to update.

3. Log into BEETS, and locate and find the application.

4. You will be directed to the *Workflow* screen, and the *Workflow Status* will be in **REVISIONS REQUIRED**, indicating revisions are needed. Ⓐ

5. Click on the task and review the instructions. Ⓑ

Continued on next page…

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Summary for Steps, continued:

6. Click on the *Equipment* tab.

7. Hover over the measure listed in the Equipment screen. Ⓒ

8. Some icons will appear; click the Edit icon (i.e. pencil). Ⓓ

9. The '*Edit Equipment*' screen will appear. Ⓔ

10. Click '*Apply Approved Equipment*' button to input a new measure. Ⓕ

Continued on next page….

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BEETS
BPA Energy Efficiency Tracking System

Summary of Steps, continued:

11. Another '*Edit Equipment*' screen will appear. (G)

12. Select the *Measure Type* from the drop down (frequently only one option). (H)

13. Paste the valid **Measure RefNo** from the approved UES measure list in the *Ref ID* field. *NOTE: The measure search functionality within BEETS is not robust so we do not recommend using BEETS as the Measure RefNos source.* (I)

14. Select the desired *Quantity* (if not '1'). (J)

15. Click the blue *Search* button. (K)

Continued on next page…

Measure Type *	Ref.ID	Manufacturer	Model
BPA_UES (H)	RHVHS14246 (I)	⊗	⊗

(K) 🔍 **Search**   **Reset**

⊗ *Do not use, not functional.*

Edit Equipment ✏

Category (G)
UES

Name
UES - All

Ref.ID
RHVHS1424_001

Quantity *
1 (J)

BEETS
BPA Energy Efficiency Tracking System

Summary for Steps, continued:

16. The measure you inputted will appear. Ⓛ

17. Hover over the right of the measure and click *'Apply Approved Equipment'* to select this measure (if desired, click *View Equipment* to view measure details). Ⓜ

18. You will be returned to the *Edit Equipment* screen; click the *Save* button at the bottom to add the updated measure.

19. You will return to the *Equipment* screen, the updated measure will appear. Ⓝ

20. Click on the *Workflow* tab to return to the Workflow. Ⓞ
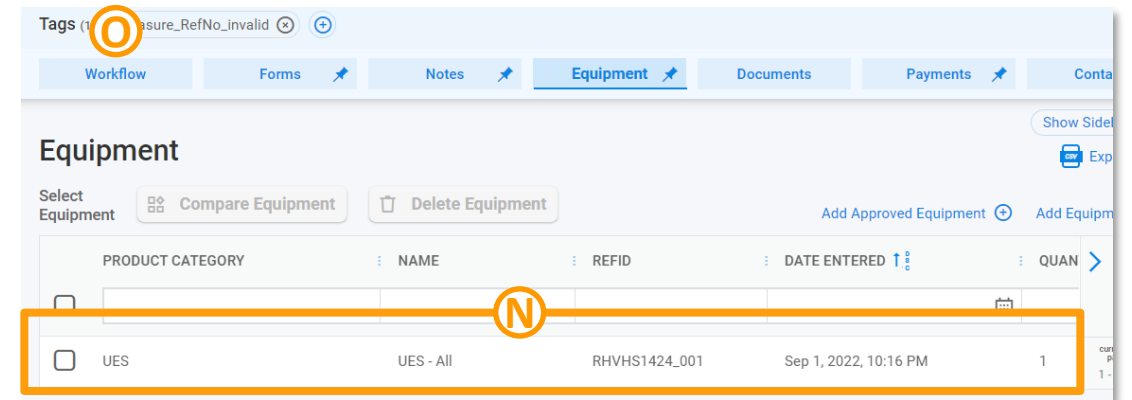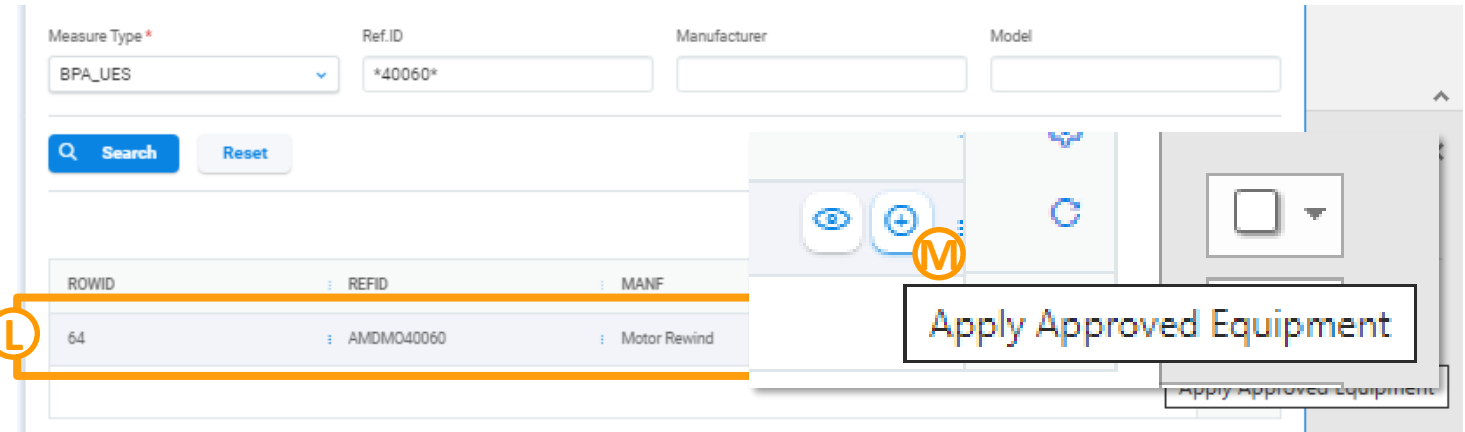
Continued on next page…

Summary for Steps, continued:

21. From the Workflow tab, click on the *Application Form Field Entry Task – Instructions for Resolving Found Issues.* (P)

22. Click *Save* at the bottom to close out the task. (Q)

23. A final confirmation task will appear. (R)

24. Click on task and certify and submit to move application forward. (S)

25. If all issues have been resolved, the application will move forward to the appropriate BPA review.

END

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Revisions Required:
Duplicate Applications

For programs inputted via bulk upload, BEETS will perform some validation to ensure potential duplicate applications are flagged to the user. The common fields used to identify duplicates vary between programs, but tend to involve some combination of duplicate Measure RefNo, Completion Date, Quantity, and/or address. If a potential duplicate is identified, BEETS will create a task for the user to either confirm the application is NOT a duplicate, or if an error occurred, direct the user to cancel.

Summary for Steps:

1. If a potential duplication application is entered into BEETS, the user will receive notification via email. **A**

2. Log into BEETS, and copy and paste the application number from the notification email into the global navigation search window to open the application.

3. You will be directed to the *Workflow* screen, and the Workflow Status will indicate that revisions are needed (i.e. **REVISIONS REQUIRED**) **B**

Continued on next page…

Hello,

BPA has returned the project name UES Measures with Project #: Y1UEPS1549991007 during compliance review. The reason(s) for this are:

A - Duplicate project found.

To view the project please log into BEETS at visiondsm.programprocessing.com and search for Project #: Y1UEPS1549991007

Thank you and have a great day!

Current status
Revisions Required **B**
Processing mode: Standard

33	TASKS TO DO
	○ TASK ● AUTOMATED ○ DEPENDENT

4	TASKS COMPLETED
	● AUTOMATED

Add Ad-hoc Task ⊕
Take All Tasks ⚑

TASK	Application Form Field Entry Task ○ Confirm Application Not a Duplicate	Created: Aug 12, 2022 6:09 PM	Term: 0 days	Due Date: not applicable
		Assigned To: UTILITY GROUP; UTILITY NO-EMAIL;		

Summary of Steps, continued:

4. Click on the task referencing a potential duplicate and review the instructions. Ⓒ

5. Click *Cancel* button at bottom to close task screen. Ⓓ

Continued on next page….

Current status
Revisions Required
Processing mode: Standard

Add Ad-hoc Task ⊕
Take All Tasks ⚑

33	TASKS TO DO	4	TASKS COMPLETED
	○ TASK ● AUTOMATED ○ DEPENDENT		● AUTOMATED

TASK

Application Form Field Entry Task

○

Confirm Application Not a Duplicate

Created: Aug 12, 2022 6:09 PM
Term: 0 days
Due Date: not applicable

Assigned To: UTILITY GROUP; UTILITY NO-EMAIL;

Ⓒ You may have submitted a duplicate application. Please click on the Forms Tab > Utility Review Form and scroll down to find the application identified as a duplicate. Search for and open the potential duplicate application and review to determine if an error occurred.

If this application is not a duplicate, please enter comments below to confirm and clarify why a similar application was entered. If application is a duplicate, please complete the cancellation task below or contact your COTR for assistance.

Utility Review

Duplicate Projects

Reason why this is not a duplicate

Save   Cancel Ⓓ

Summary of Steps, continued:

6. To view the potential corresponding duplicate application number, click *Forms* tab and click on *Utility Review* form. **(E)**

7. Scroll down to the *Duplicate Projects* section. **(F)**

8. Copy application number in the *Duplicate Project Found* box. (Keyboard Shortcut: Ctrl + C) **(G)**

9. Click on the *Global Navigation Search* icon to open the search window. **(H)**

Continued on next page....
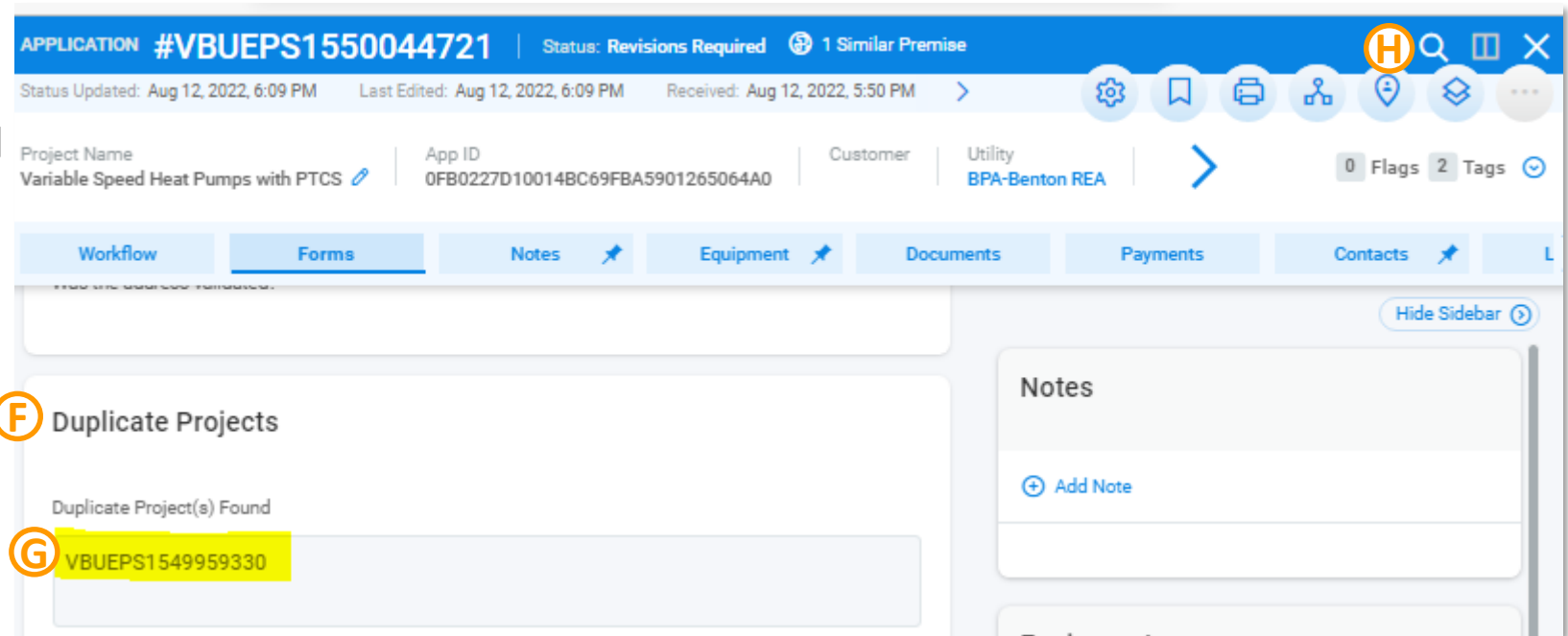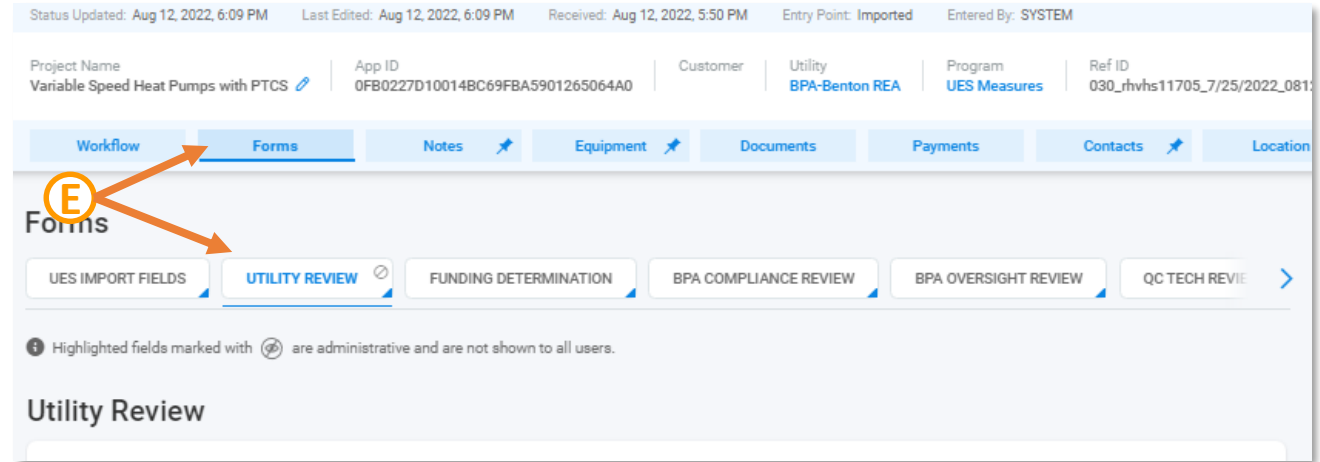
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Summary of Steps, continued:

10. Click on *Applications* in *'Where to search?'* section. Ⓘ

11. Select *'Project Number'* under *Applications Search Criteria*. Ⓙ

12. Paste '*Project Number*' (i.e. Application Number) in *keyword search field*. Ⓚ

13. Click blue search icon. Ⓛ

14. You will be taken directly to the Application page.

15. Review application Form information to determine if duplicate occurred by clicking on the *Forms* tab; use the breadcrumbs at the bottom to compare the two applications. Ⓜ

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Summary of Steps, continued:

15. Once you have confirmed, return to original application using the breadcrumbs at the bottom of the *Workflow* screen.

16. ***If you have confirmed this is not a duplicate:***

   a) From the *Workflow* screen, click on the duplicate task and enter comments as to why not a duplicate; *NOTE: be as descriptive as possible to avoid application being sent back for more information.* Ⓝ

   b) Click *Save* to close out task. Ⓞ

   c) From the *Workflow* screen, complete any remaining confirmation tasks to move application forward.

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BEETS
BPA Energy Efficiency Tracking System
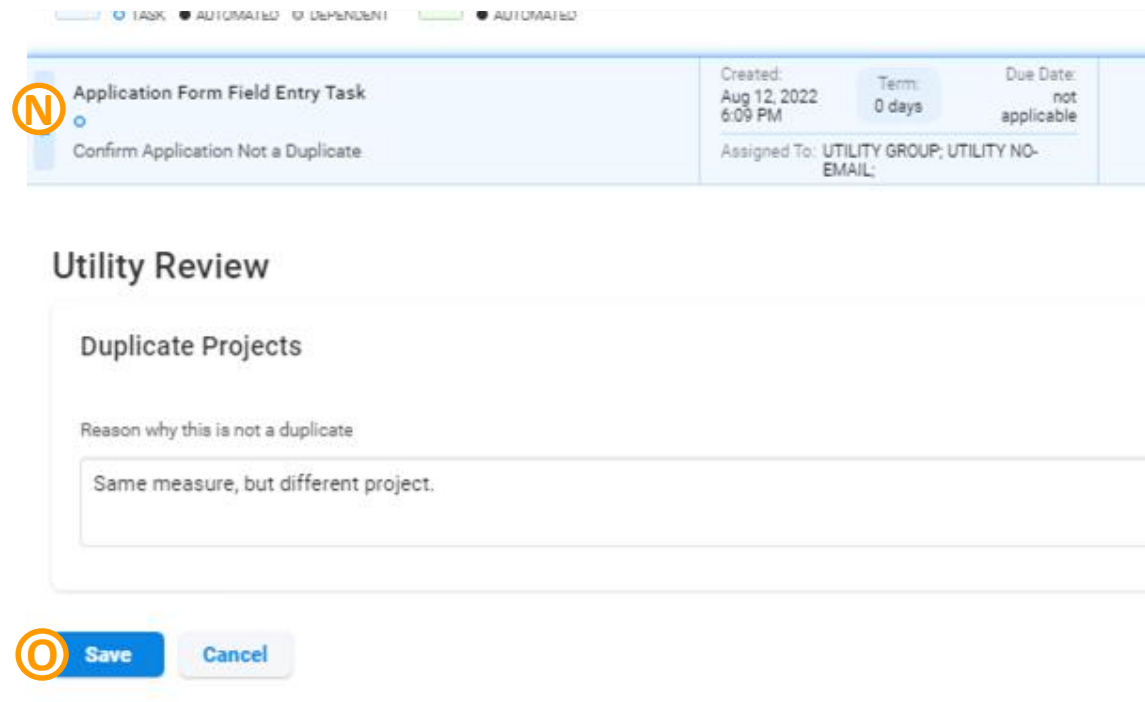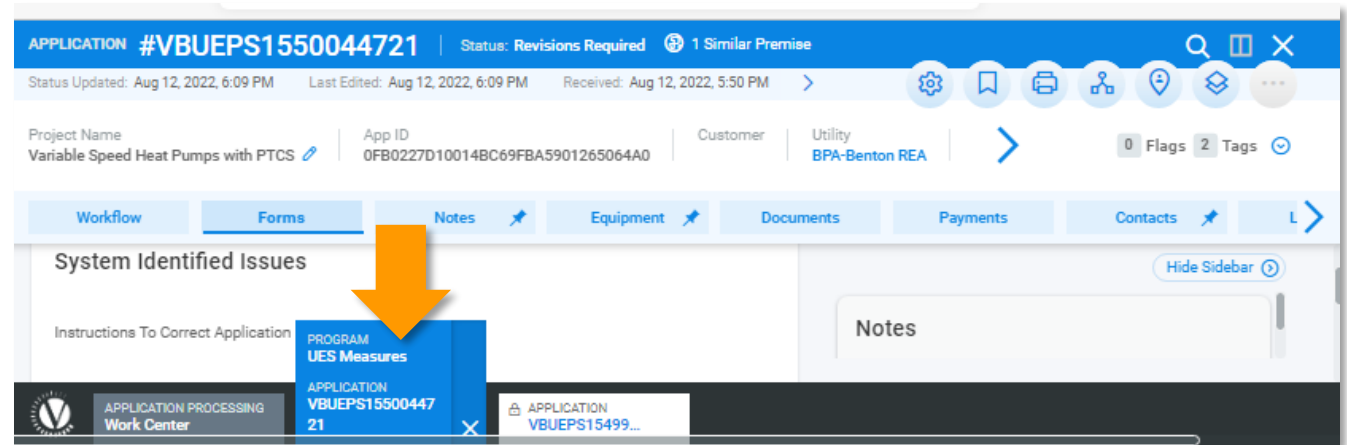
Summary of Steps, continued:

17. ***If application is a duplicate,*** *complete the steps below or* **contact your COTR for assistance***:*

   a) Click on the *Application Form Field Entry - Cancel Application* task **(P)**

   b) Provide *Cancellation Reason* as requested. **(Q)**

   c) Click the *Save* button to close out task. **(R)**

END

Revisions Required
Processing mode: **Standard**

Take All Tasks

33	TASKS TO DO
	○ TASK ● AUTOMATED ○ DEPENDENT

4	TASKS COMPLETED
	● AUTOMATED

TASK

Application Form Field Entry Task
○
Confirm Application Not a Duplicate

Created: Aug 12, 2022 6:09 PM
Term: 0 days
Due Date: not applicable
Assigned To: UTILITY GROUP; UTILITY NO-EMAIL;

(P) Application Form Field Entry Task
○
(P) Cancel Application

Created: Aug 12, 2022 6:09 PM
Term: 0 days
Due Date: not applicable
Assigned To: UTILITY GROUP; UTILITY NO-EMAIL;

Complete this task only if you wish to <u>cancel</u> the application. Please input 'Cancellation Reason' below. Once you click Save, the application will move to APPLICATION CANCELLED status.

Utility Review

Cancellation Reason

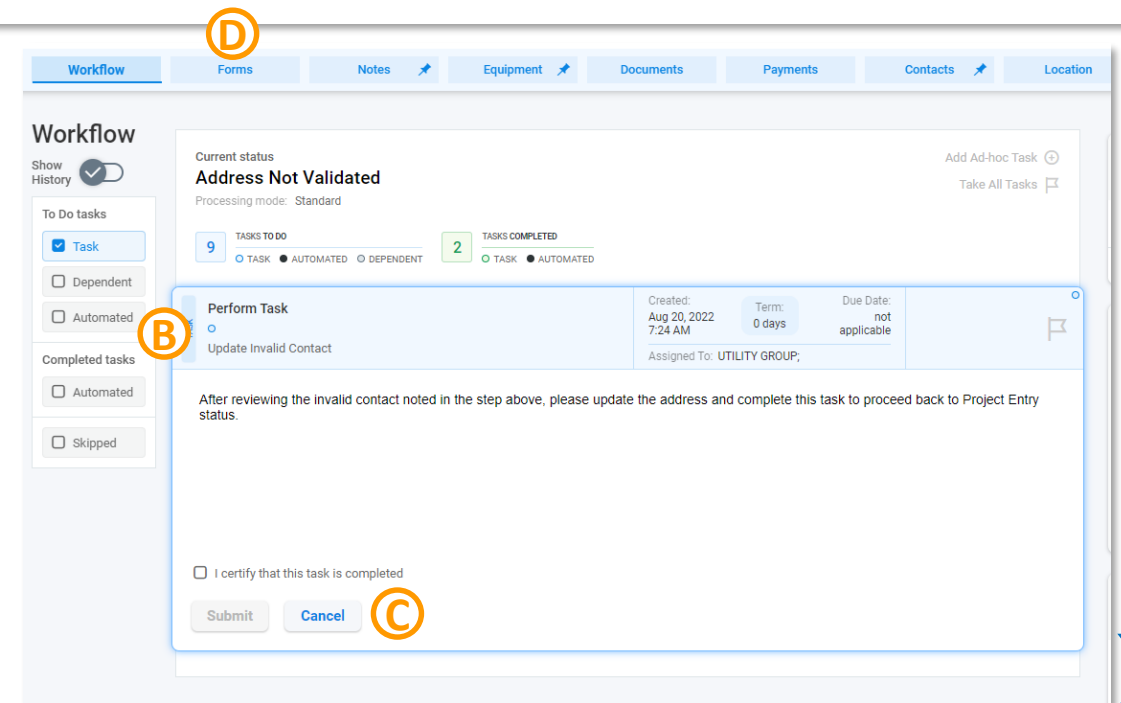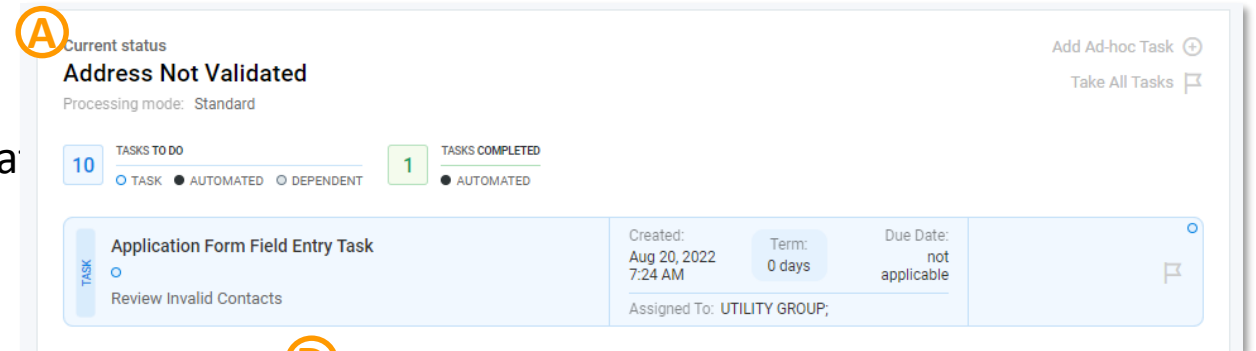Cancellation Reason

(Q) Duplicate

(R) Save   Cancel

Revisions Required:
Invalid Address

BEETS
BPA Energy Efficiency Tracking System

Some programs within BEETS validate premise addresses against the USPS database. If a match is not found, an Invalid Address task will appear. User may choose to correct the address if a mistake was made, or verify that that address as provided is correct.

Summary of Steps:

1. User will receive notification via email that an applica... has an address error.

2. Log into BEETS, and copy and paste the application number from the notification email into the global navigation search window to open the application.

3. You will be directed to the *Workflow* screen, and the Workflow Status will indicate revisions are needed. Ⓐ

4. Click on the *Perform Task - Review Invalid Contacts* task and review instructions (verbiage may vary slightly by program.) Ⓑ

5. Press *Cancel* at bottom of task to close task. Ⓒ

6. As directed, click on the *Forms* Tab. Ⓓ

Return to Table of Contents

Ⓐ
Current status
Address Not Validated
Processing mode: Standard
Add Ad-hoc Task
Take All Tasks

10	TASKS TO DO
	○ TASK ● AUTOMATED ○ DEPENDENT

1	TASKS COMPLETED
	● AUTOMATED

TASK
Application Form Field Entry Task
○
Review Invalid Contacts

Created: Aug 20, 2022 7:24 AM
Term: 0 days
Due Date: not applicable

Assigned To: UTILITY GROUP;

Ⓓ

| Workflow | Forms | Notes | Equipment | Documents | Payments | Contacts | Location |

Workflow
Show History ⬤

To Do tasks
☑ Task
☐ Dependent
☐ Automated

Completed tasks
☐ Automated
☐ Skipped

Current status
Address Not Validated
Processing mode: Standard
Add Ad-hoc Task
Take All Tasks

9	TASKS TO DO
	○ TASK ● AUTOMATED ○ DEPENDENT

2	TASKS COMPLETED
	○ TASK ● AUTOMATED

Perform Task
○
Ⓑ Update Invalid Contact

Created: Aug 20, 2022 7:24 AM
Term: 0 days
Due Date: not applicable

Assigned To: UTILITY GROUP;

After reviewing the invalid contact noted in the step above, please update the address and complete this task to proceed back to Project Entry status.

☐ I certify that this task is completed

Submit   Cancel Ⓒ

Summary of steps, continued:

7. Click on the relevant form that contains the application addresses; this can vary by program, but is typically the leftmost form (i.e. 'Start Here' or 'UES Import' form). *NOTE: You must make the changes in the form; DO NOT CHANGE ADDRESS IN THE CONTACTS FORM, as it may cause Workflow errors.* (E)

8. Scroll down form to review facility or premise address to determine if correction is needed.

    a) If correction is needed, click *Edit Form* button and correct and *Save* changes. (F)

    b) If address is valid, no action needed.

9. Return to the *Workflow* screen. (G)

Continued on next page….

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Summary of steps, continued:

10. Click on invalid address task to open the task, and click *Save* to close. (H)

11. Complete any remaining certification tasks to move the application forward. (I)

12. If you did not make any updates to the address because it is correct as written, you will receive a final confirmation task indicating that you confirm the address should remain as inputted. (J)

13. Once complete, the application will proceed to the next step in the Workflow. **END**

Revisions Required:
Missing Required Fields

BEETS prevents users from moving forward in the process until all required data are provided. For applications that are entered into the system via Bulk Upload (i.e. UES, Non-Residential Lighting, Custom Projects Option 2, etc.), if required data has not been provided, the users will receive an 'Update Required Fields' task, prompting the users to provide missing data before the application can move forward to BPA review. Complete the steps below to resolve.

Summary of Steps:

1. User will receive notification via email that the application is missing required data.

2. Log into BEETS, and open the application.

3. You will be directed to the Workflow screen, and the *Workflow Status* will be REVISIONS REQUIRED. Ⓐ

4. From the *Workflow* tab, click on the task directing you to provide missing data or to update required fields (task name and instructions may vary slightly by program). Ⓑ

Continued on next page….

Summary of Steps, continued:

5. If you have an *Application Form Entry task and an 'Edit Form'* appears: **C**

    a) Scroll down to review form for missing data as indicated by a red asterisk*. **D**

    b) Provide missing data and click *Save* button at bottom (which will turn blue when changes made to form). **E**
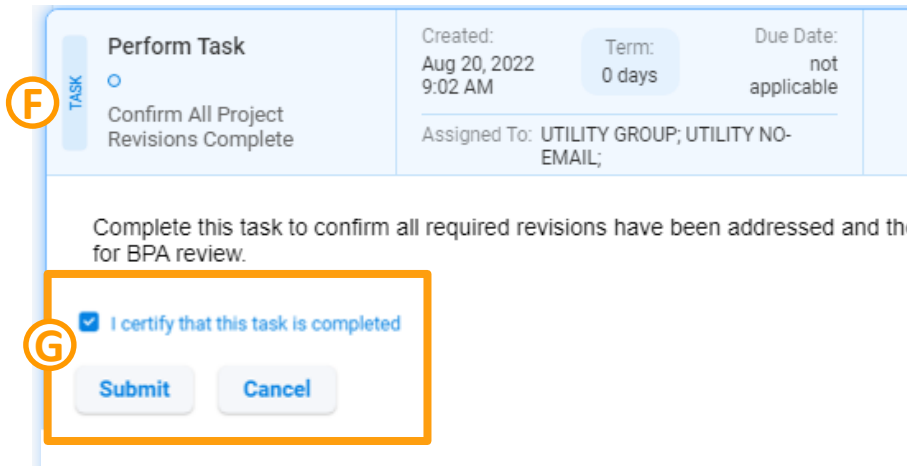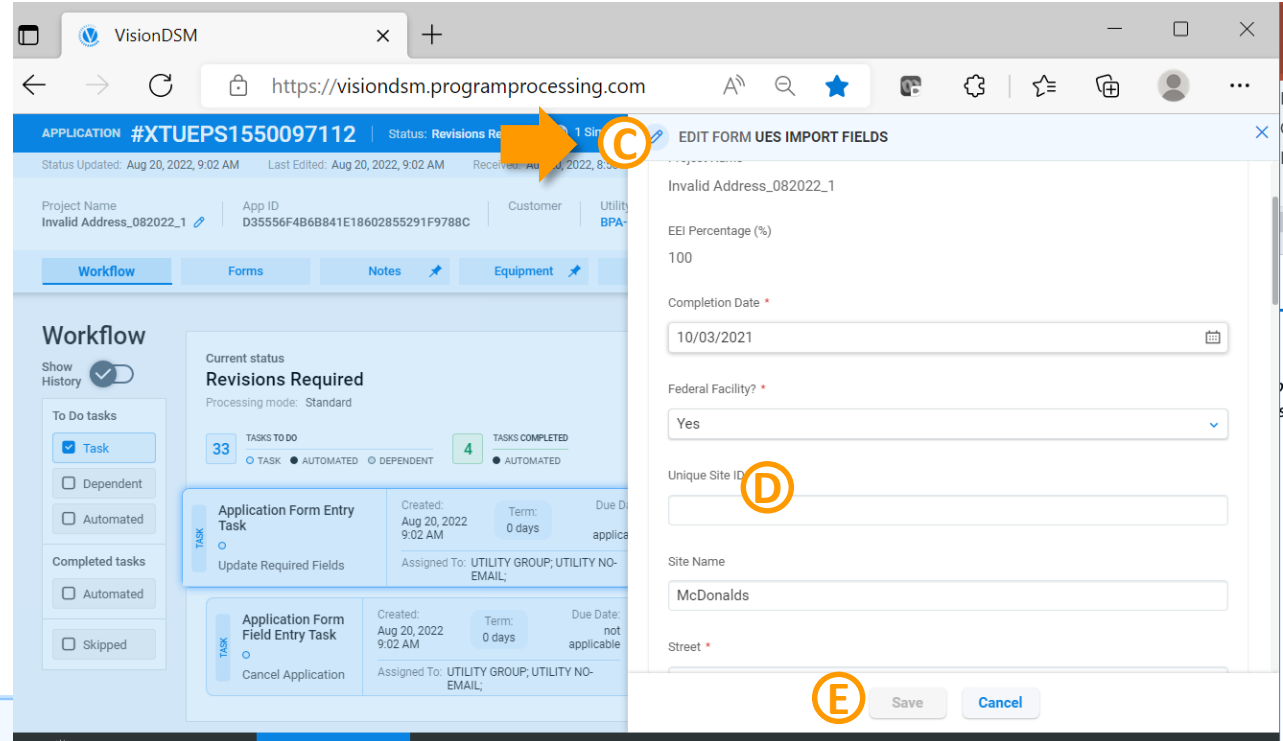
c) You will return to the Workflow screen. Click on the *'Confirm Complete'* task. **F**

d) Click the blue checkbox to certify and submit. **G**

e) If all changes needed have been completed, the application will move forward to BPA review.

Continued on next page….

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BEETS
BPA Energy Efficiency Tracking System

Summary of Steps, continued:

6. After clicking, if you see an <u>Application Form Field Entry Task with instructions</u>: (H)

    a) Scroll down to review instructions to determine what information is needed. **Be sure to note which Form needs to be updated and which field needs completion.** (I)

    b) Click *Cancel* button to close task window (NOTE: if you click *Save*, the task will disappear, but will reappear later in the workflow if you try to move forward without providing information). (J)

Continued on next page...

Application Form Field Entry Task
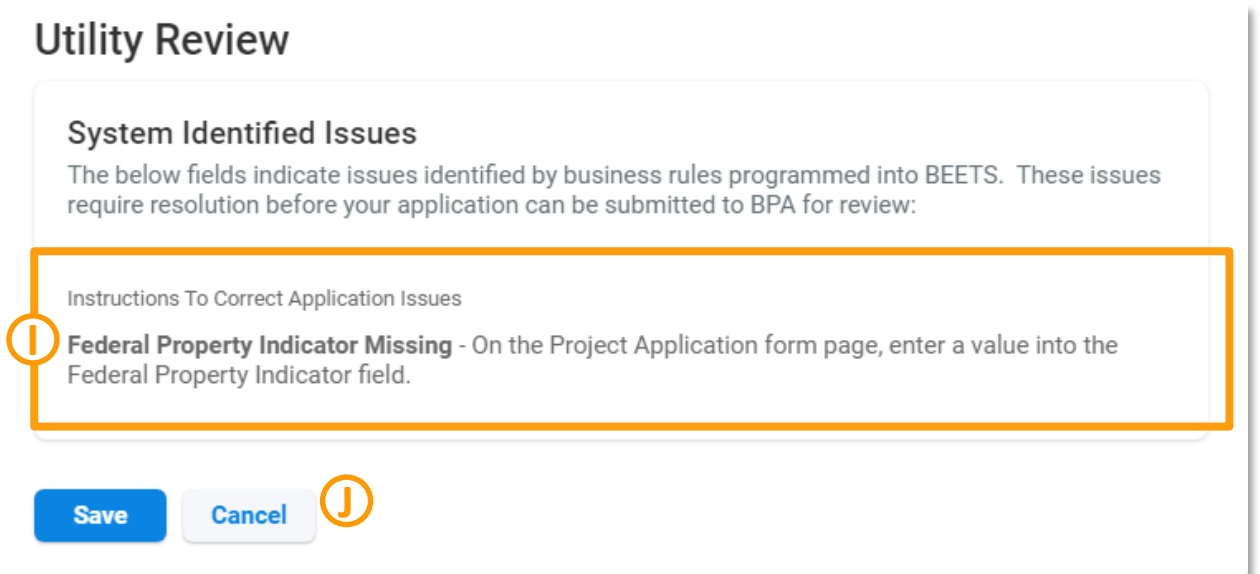
Created: Aug 15, 2022 10:06 AM | Term: 0 days | Due Date: not applicable

(H) Instructions for Resolving Found Issues

Assigned To: UTILITY GROUP;

Utility Review

System Identified Issues

The below fields indicate issues identified by business rules programmed into BEETS. These issues require resolution before your application can be submitted to BPA for review:

Instructions To Correct Application Issues

(I) **Federal Property Indicator Missing** - On the Project Application form page, enter a value into the Federal Property Indicator field.

Save | Cancel (J)

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Summary of Steps, continued:

c) Click on the *Forms* tab to access application data. **K**

d) Click on the specific form that you were directed to review in the instructions. **L**

e) Scroll down to identify missing field (as indicated by red asterisk), and click *Edit Form* button. **M**

f) Provide missing data and click *Save*. **N**

g) Return to the *Workflow* screen and as instructed, close out remaining confirmation tasks. **O**

h) If no further changes are needed, the application will proceed to BPA review (i.e. Compliance or Technical Review). **END**

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Oversight

Uploading required Oversight documentation

Oversight in BEETS – What's Changing?

Oversight is the review process that BPA performs on a sample set of applications and projects to verify that measures were ordered, purchased and installed in compliance with BPA's statutory and financial obligations. In BEETS, if applications are selected for oversight, customers will receive an automatic notification and then should proceed to upload Oversight documentation* directly into the system. **Customers should NOT use the Bulk Uploader to submit oversight documentation as you will need to resubmit, and it will slow down the oversight process.** *Step-by-step guidance follows this page.*

What's changing (and what's staying the same)?

	IS2.0 (Previous)	BEETS (Current)
Reference for Oversight Documentation Requirements	Customer references the IM.	Customer references the IM (no change).
Oversight Selection	Oversight selection is based on <u>contents of a single invoice package.</u>	<u>Individual applications</u> (i.e. measures or projects) will be selected for oversight
Notifications of Oversight Selection	Customer receives a <u>single email notification</u> of oversight selection from COTR.	Customer receives an <u>automated email notification from BEETS for each application</u> selected for oversight.
Oversight Documentation Submittal	Customer submits documentation <u>via physical mail or Dropbox.</u>	Customer <u>uploads documentation directly into BEETS</u>
Oversight Results	<u>COTR emails customers</u> with oversight results.	Oversight results are <u>stored in the application page in BEETS</u> for reference.

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*Customers should reference the Implementation Manual on BPA.gov for specific Oversight documentation requirements.

Oversight is performed by completing the step-by-step instructions below.

Summary of Steps:

1. If one or multiple applications have been selected for oversight, you will receive an automated email for each application selected. Ⓐ

2. Compile oversight documentation per the requirements defined in the Implementation Manual (found on BPA.gov).

3. Once all required documentation has been compiled, log into BEETS.

4. Open the application by copying and pasting the application # (or project #) from the notification email into the *Global Navigation Search* field in BEETS. (If needed, more detailed instructions on how to open the application here)*.Ⓑ

Continued on next page….

Ⓐ

Tue 10/25/2022 9:51 AM
donotreply@programprocessing.com

[EXTERNAL] An Option 2 Custom Project has been Manually Selected for Oversight in BEETS

To   Mancke, Jennifer L (CONTR) - PEH-6

Retention Po...   Expires   10/25/2029

Project # (i.e. Application #)

This email is to notify you that the project named small project 6 with Project #: BPC2CR1549658654 has been manually selected for oversight by BPA. To view the project, please log into BEETS at visiondsm.programprocessing.com and search for Project #: BPC2CR1549658654.

Thank you and have a great day!

BEETS
BPA Energy Efficiency Tracking System

ndsm.programprocessing.c...

APPLICATION PROCESSING   UTILITY AND PROGRAM MANAGEMENT

Ⓑ

Invoice Dashboard   Bulk Uploader   My Dashboard

Users can also view and access applications by program and status from the Utility & Program Management tab.
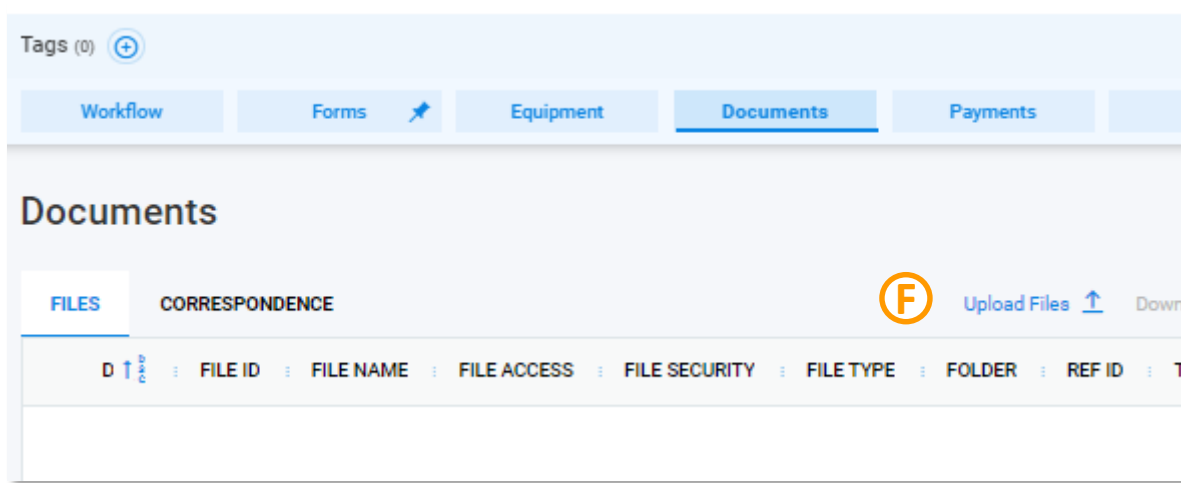
Summary of Steps, continued:

5. After opening the application page, you will see your application is in OVERSIGHT DOCUMENT UPLOAD status. **C**

6. Click on the task to view the instructions. **D**

7. Per the instructions, click on the *Documents* tab to proceed with uploading oversight documentation. **E**

Continued on next page….

BEETS
BPA Energy Efficiency Tracking System

Summary of Steps, continued:

8. The *Documents* screen will appear; click on *Upload Files*. **F**

Tags (0) ⊕

| Workflow | Forms 📌 | Equipment | **Documents** | Payments |

Documents

| **FILES** | CORRESPONDENCE |

F Upload Files ⬆ Down...

| D ↑ | FILE ID | FILE NAME | FILE ACCESS | FILE SECURITY | FILE TYPE | FOLDER | REF ID | T. |

9. The *File Upload* screen will appear; upload document and complete all required fields by selecting the appropriate responses from the drop downs. **NOTE: File Upload options may vary slightly by program.** **G**

10. Click *Upload* once complete. **H**

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Drag and Drop files or Browse to upload here.

⬆ FILE UPLOAD **G** ✕

Folder defaulted to Files, no other option.

Files *

⬆ Drop files to attach, or brows...

Select File Type for your reference.

Folder *

FILES ⌄

File Type *

⌄

Add personalized Tags to help identify or categorize documents.

Tags

ADD NEW | SELECT FROM EXISTING

⌄

⊗ *File Access Not Functional; select any option.*

File Access *

Public ⌄

File Security *

All Access ⊙
All Access •
Restricted Access

File Security determines who can view document; select Restricted Access to limit access to those with sensitive document privileges for a specific utility.

H Upload | Cancel

≫ 112
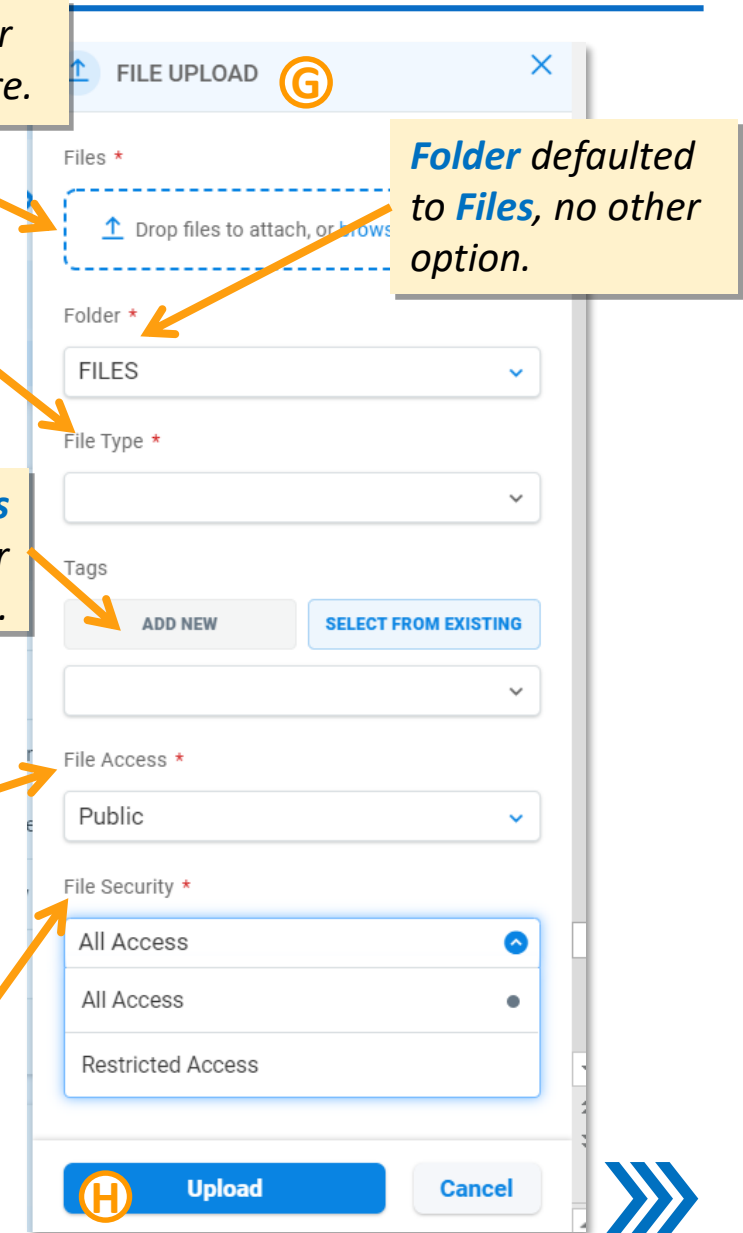
Summary of Steps, continued:

11. After upload, your documents will appear in the *Documents* screen. Ⓘ

12. As needed, repeat steps 8 – 10 until all required documentation has been uploaded.

13. Once complete, click on the *Workflow* tab to return to the *Workflow* screen. Ⓙ

Continued on next page….

Hover over document name to view shortcuts to **Edit, Download, View, or Delete.**

Edit
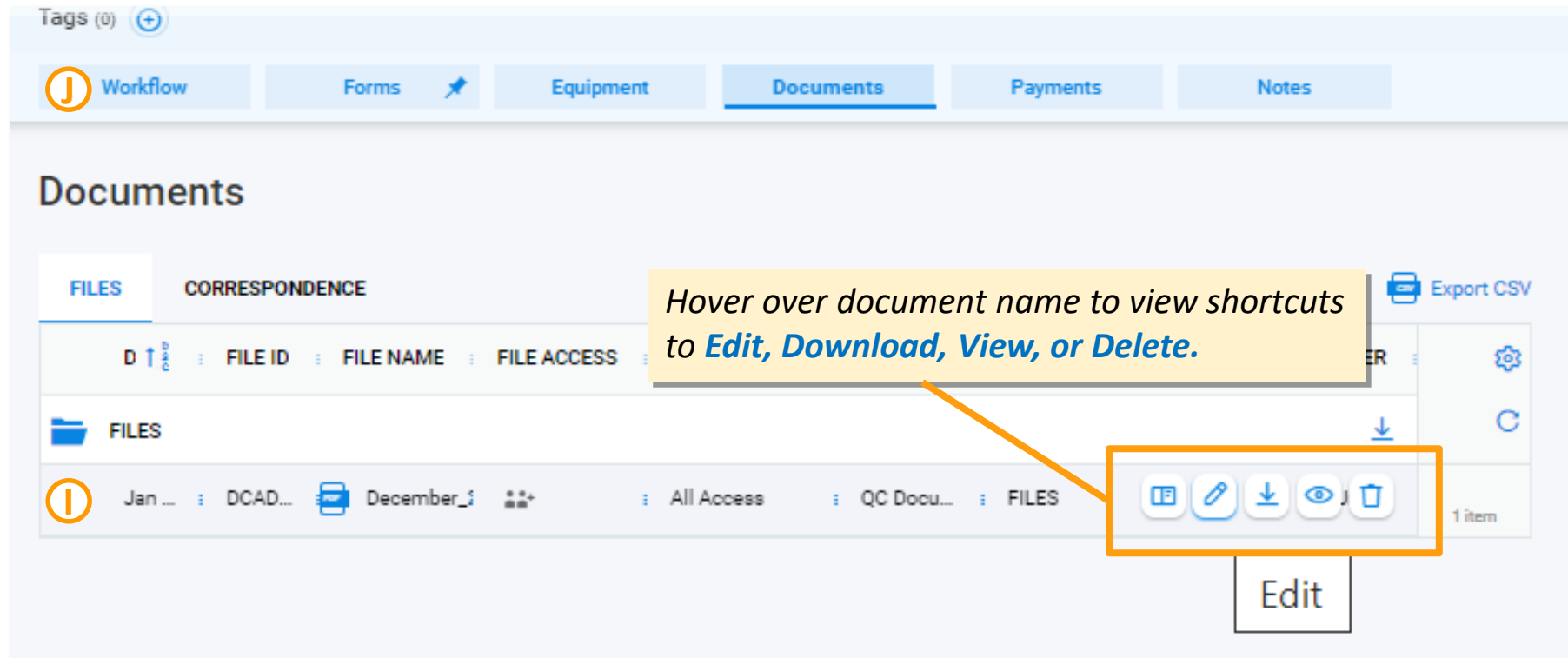
Summary of Steps, continued:

14. From the Workflow screen, click on the task. Ⓚ

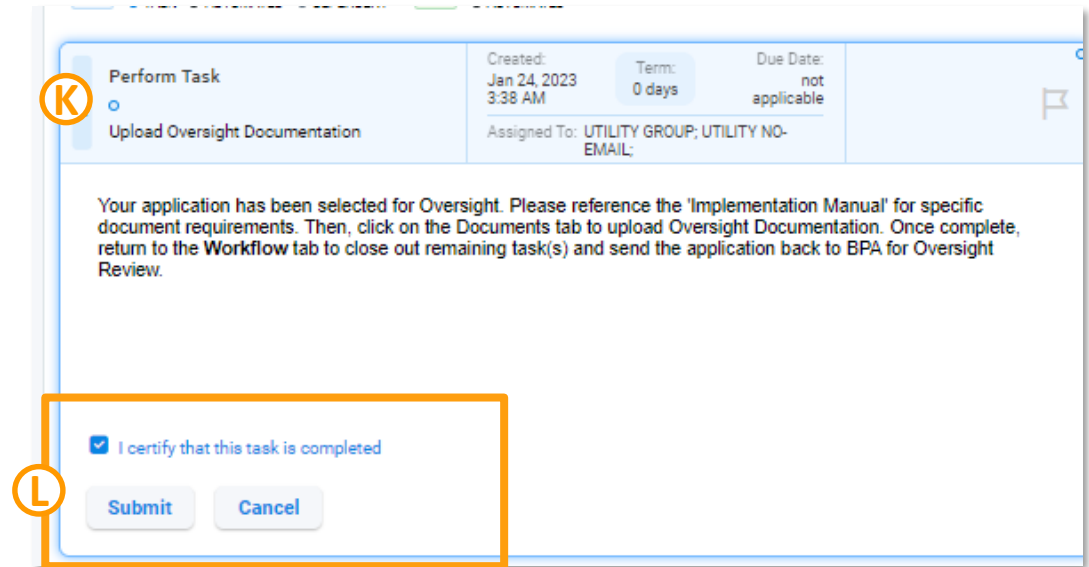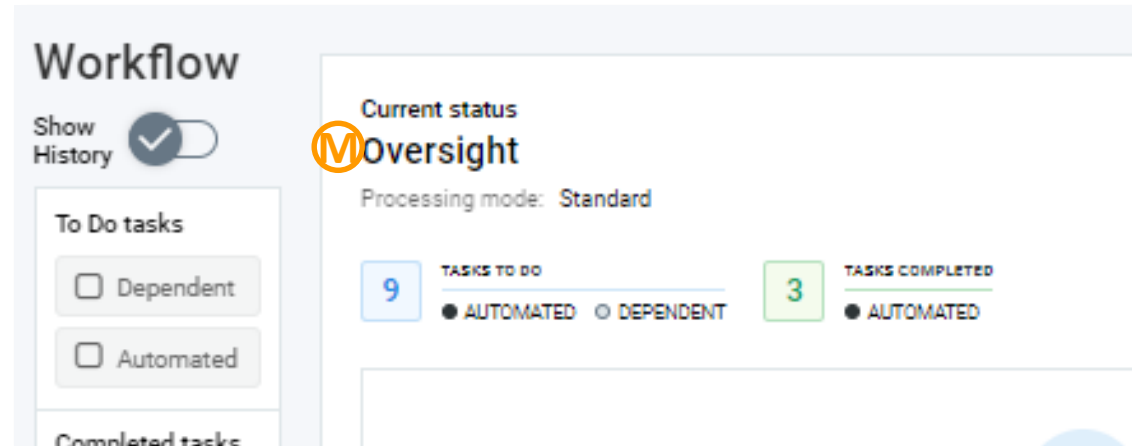15. If you are ready to submit to BPA, click the *Certify and Submit* options at the bottom of the task. Ⓛ

Ⓚ
| Perform Task | Created: Jan 24, 2023 3:38 AM | Term: 0 days | Due Date: not applicable |
| Upload Oversight Documentation | | Assigned To: | UTILITY GROUP; UTILITY NO-EMAIL; |

Your application has been selected for Oversight. Please reference the 'Implementation Manual' for specific document requirements. Then, click on the Documents tab to upload Oversight Documentation. Once complete, return to the **Workflow** tab to close out remaining task(s) and send the application back to BPA for Oversight Review.

☑ I certify that this task is completed

Ⓛ
Submit   Cancel

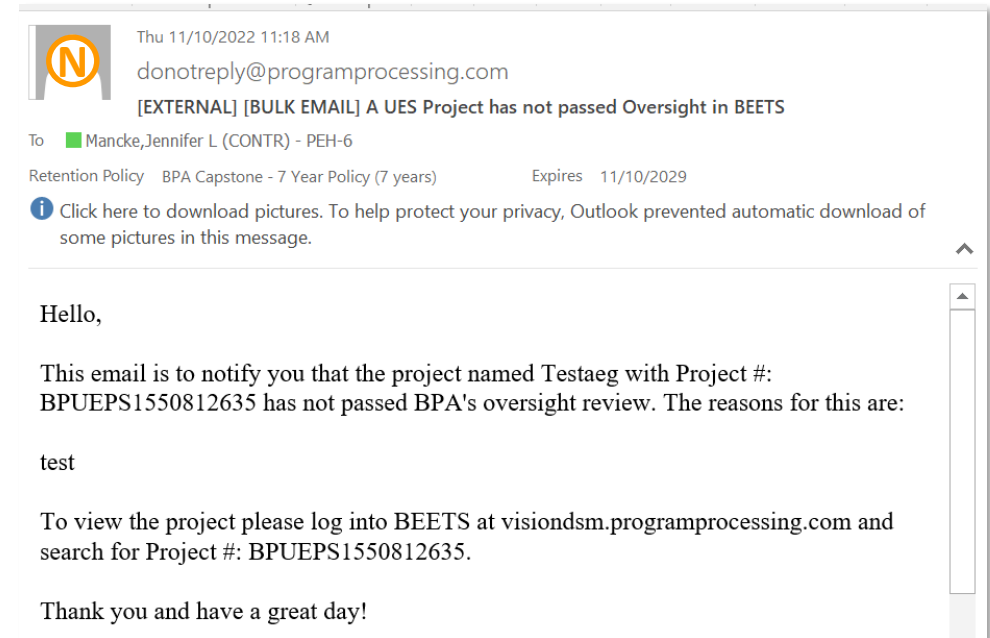16. Your Workflow screen will clear, the COTR will be notified, and your application will move to OVERSIGHT status. Ⓜ

Continued on next page....

Workflow

Show History ☑

To Do tasks

☐ Dependent

☐ Automated

Completed tasks

Current status
ⓂOversight

Processing mode: Standard

| 9 | TASKS TO DO ● AUTOMATED ○ DEPENDENT |
| 3 | TASKS COMPLETED ● AUTOMATED |

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Summary of Steps, continued:

17. Your COTR will then review your oversight documentation and make a determination.

18. If approved, your application will move to READY TO INVOICE status; your application is now ready for the payment approval (i.e. invoicing) process (see the ***Invoicing and Performance Payment Guide***); oversight is complete. [END]

19. If NOT approved, your application will move to OVERSIGHT REVISIONS REQUIRED status.
Proceed to step 20.

20. You will receive and automated email notification stating that your application has not passed oversight. (N)

Continued on next page.....

Thu 11/10/2022 11:18 AM

(N) donotreply@programprocessing.com

[EXTERNAL] [BULK EMAIL] A UES Project has not passed Oversight in BEETS

To Mancke,Jennifer L (CONTR) - PEH-6

Retention Policy   BPA Capstone - 7 Year Policy (7 years)   Expires   11/10/2029

(i) Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Hello,

This email is to notify you that the project named Testaeg with Project #: BPUEPS1550812635 has not passed BPA's oversight review. The reasons for this are:

test

To view the project please log into BEETS at visiondsm.programprocessing.com and search for Project #: BPUEPS1550812635.

Thank you and have a great day!

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Oversight in BEETS (7 of 7)

Summary of Steps, continued:

21. Open the application and click on the task to view the form containing the oversight comments (alternatively, you may need to click on the *Forms* tab as this can vary by program). Ⓞ

22. Scroll down the form to the section marked '*Oversight*' to review oversight comments (naming varies slightly by program). Ⓟ

23. Address each comment by providing a response for each finding as requested. Ⓠ

24. Once complete, click the *Save* button. Ⓡ

25. From the *Workflow* screen, upload documentation via the document task as needed.

26. Close out remaining tasks in the *Workflow* screen to return application to your COTR; the application will move to OVERSIGHT status.

END

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Utilities and Program Management

Accessing applications by utility and program

Utilities and Program Management Page

This page provides quick access to all applications by utility and program. Some functionality within this area is less relevant to BPA customers, however, this also enables access to utility specific payment functionality that is needed in the invoicing process. The following pages provide more detail around each screen.

💡 *While multiple utilities are shown, **users will only have access to their specific utilities** as assigned at setup.*

Utilities:

Programs:

Applications:

Return to Table of Contents

Utilities and Program Management: Utility Page

Once a Utility is selected, a Programs page will appear. This allows users to select a specific program to view all applications within those programs. This also provides access to the Payment Approvals functionality, which is needed to approve invoices. See Invoicing and Performance Payments Guide for more information.

*Payment Approvals tab is where a customers goes to approve invoices. **See Invoicing and Performance Payment Guide** for more information; this tab is only viewable to users who have invoice approval permissions.*

Click on the gear icon to hide all widgets except Programs and Payment Approvals; others are not value add to BPA users.

*From the Utility and Program Management Page, click on a **Utility Name** to view a list of Programs used by that Utility.*

⊗ *Utility names in BEETS always begin with "BPA –", which is a requirement of the system and irrelevant to end users.*

*Click on a **Program Name** to view All Applications within that selected Utility and Program*

💡 *Click and drag between column headers to **expand or reduce column size** to make data more visible.*

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Utilities and Program Management: Applications Page

After clicking down into a specific utility and program from the Utilities and Program Management page, you can access all related applications in a list format by clicking the Applications Tab.

Click on a **Applications Tab** to view all applications within that selected utility and program.

Click on blue gear icon to **add, remove, or reorder columns from view**.

Optimize your view by double-clicking between the columns (three vertical blue dots) to **Expand Columns,** or click and drag to **Reduce Column Size.**

Click on scroll bar or page numbers to **view more applications.**

Click on **Project #** or **Project Name** to open application.

Use headers to search within results; to do so, either enter exact field values, or utilize asterisks before and after the search term to search for partial data within a field.

⊗ *Not functional; do not use.*

Key Links and Support Resources

Key links and information on finding help using BEETS

BEETS Key Links & Support Resources

BEETS Landing Page – *Main BEETS informational site on BPA.gov including announcements, information, and links to training and support resources.*

BEETS Site – *Submit EEI reporting and invoices*

BEETS Reports Portal – *Run reports on EEI reporting and invoice data*

BEETS Training Materials and Support Resources – *Find answers to common questions and access training resources*

Additional questions? Email BEETS@bpa.gov or contact your EER.

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Appendices

Other reference information

BEETS Bulk Upload Timing

Applications that are bulk uploaded into BEETS do NOT appear in the system immediately, but rather are loaded in batches throughout the business day. This timing can vary based on the program. See below for the batch times that these are loaded.

> **!!IMPORTANT!!** *These loads are done across all VisionDSM customers, including those outside of BPA. During busy times, these loads may take longer to process and there may be a delay in applications showing up in BEETS. If you do not see your upload appear within the timeframes detailed below, but are wanting to confirm, please contact your EER to verify. **DO NOT RE-UPLOAD without checking or duplicate applications may result.***

UES, C2, Non-Reportable, and BPA Managed Timing:

When bulk upload is picked up *(i.e. deadline to load files)*	When applications are loaded into BEETS *(i.e. when it shows up)*
8:45 AM PT	**9:00 AM PT**
11:45 AM PT	**12:00 PM PT**
2:45 PM PT	**3:00 PM PT**
5:45 PM PT	**6:00 PM PT**
7:45 PM PT	**8:00 PM PT**

Non-Residential Lighting Program Timing:

When bulk upload is picked up *(i.e. deadline to load files)*	When applications are loaded into BEETS *(i.e. when it shows up)*
8:45 AM PT	
11:45 AM PT	
2:45 PM PT	**2 – 3 Business Days**
5:45 PM PT	
7:45 PM PT	

Change Log

Date	Version	Change	Change made by:
9/30/22	1.0	Original Publishing Date	Jen Mancke
11/15/22	2.0	• Adjusted list in 'Application Bulk Entry vs. Manual' to include SCA, RT • Added Bulk Upload timing slide in appendices • Added new page on common forms and use • Added slide on recommended columns in Work Center, • Added some references to the BEETS One-Time Setup Checklist	Jen Mancke
1/26/23	2.1	• Added change log • Application Entry via Manual Entry – Added clarification to click on the 'new application' tab • Added Oversight Section	Jen Mancke