One-Time Setup Check List V1.0

Updated November 15, 2022

Purpose of Checklist

BEETS
BPA Energy Efficiency Tracking System

The purpose of this checklist is for customers to perform one-time setup the first time they log into BEETS to better optimize the views and settings of BEETS. This document addresses one-time setup activities only and is not intended to provide instructional guidance on using the system*.

TIPS:

- *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 Setup Checklist'** button at the bottom of each page to return to the checklist.*

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*See BEETS Training Materials and Support Resources for guidance on system use.

One-Time Setup Checklist

BEETS (VisionDSM) Setup

REQUIRED BEETS SETUP:

❑ Logging into BEETS for the First Time

❑ Setting Local Time Zone

❑ Adding Bulk Uploader Widget to Dashboard *- applicable for those entering UES, Non-Residential Lighting, Custom Projects Option 2, and Non-Reportable applications*

❑ Setting up Key Invoicing Dashboards *(Budget & Savings and Invoice Dashboard Widget) – Applicable for those who need to view utility budgets, savings, and invoice detail.*

RECOMMENDED BEETS SETUP:

❑ Setting up your Utility & Program Management Pages

❑ Setting up Work Center Filters and Results Screen

BEETS Reports Portal (SSRS) Setup

❑ Confirming access to the BEETS Reports Portal *- required for those who need to run reports on BEETS activity*

Required BEETS Setup

Required setup needed to complete key application and invoicing processes

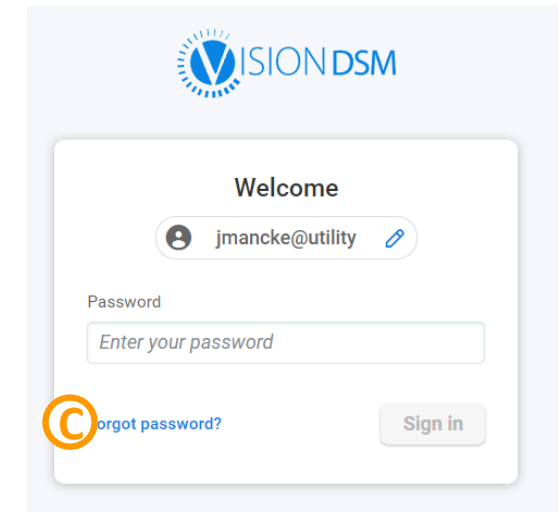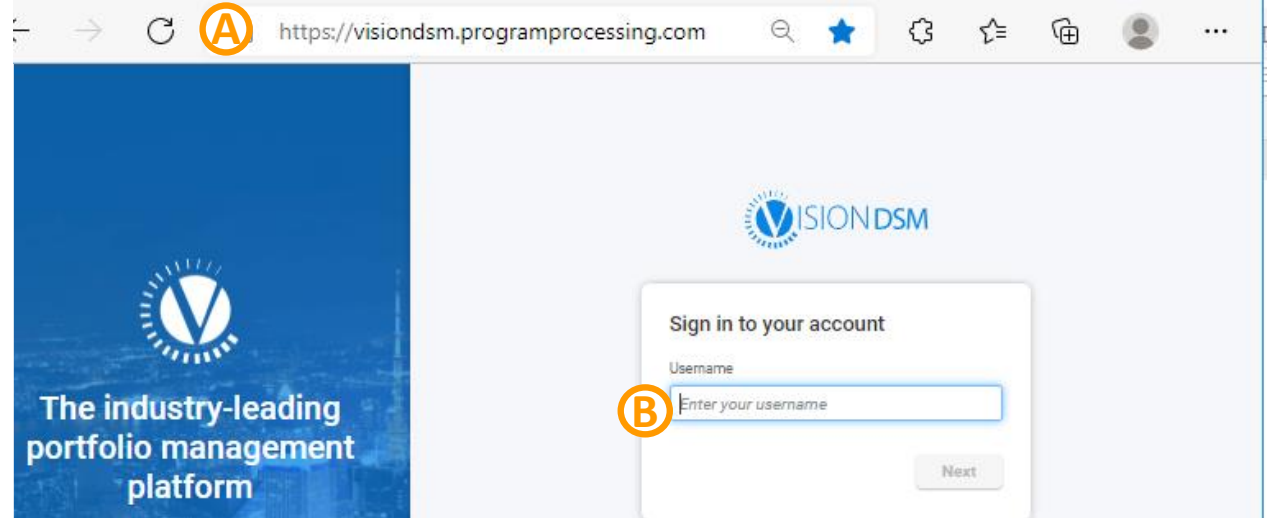# Logging in to BEETS for the First Time

Steps on how to log in to BEETS.

Logging In To BEETS:

1. Request your username from your Energy Efficiency Rep (EER).

2. Enter the following URL in your browser:
   https://visiondsm.programprocessing.com/ (A)

   • Bookmark this url for future use.

3. Enter your username into the *username field* and click the *Next* button. (B)

4. The first time you log in, you will need to click on *Forgot Password?* button and complete requested validation fields; reset instructions will be sent to the registered email address. (C)

Continued on next page….

Return to Setup Checklist

Logging In To BEETS for the first time, continued:

5. You will receive a *'Client Password Reset Request'* email from **donotreply@programprocessing.com.**

6. Click on the link in the email to reset your password. **Ⓓ**

7. If you did NOT receive this email, complete the following checks:

   a) Check your 'Spam' or 'Junk' folder; your email server may have incorrectly flagged this as junk mail.

   b) Search 'All Mail' for *"Client Password Reset Request"* to ensure there is no rule applied sending it to another folder in your email box.

   c) If you still cannot locate this email, contact your EER for assistance.

8. Once you successfully log in, you will be taken to the *Dashboard* page in BEETS; which will be blank the first time you log in. **Ⓔ**

END

Return to Setup Checklist

donotreply@programprocessing.com   ■ Mancke, Jennifer L (CONTR) - PEH-6   5/20/2022
[EXTERNAL] Client Password Reset Request
Retention Policy   BPA Capstone - 7 Year Policy (7 years)   Expires   5/20/2029
ⓘ You forwarded this message on 8/1/2022 1:32 PM.

A request was received to reset your password for VisionDSM. If you did not make this request, you can ignore this email. Contact your system administrator if you continue to receive further emails.

Please click on the following link if you'd like to reset your password.

The password reset link will only be valid for 1 hour.

Click here to reset your password:
https://visiondsm.programprocessing.com/resetpassword/699F765D20464C899861F0279F481612/7F565EE4

VISION DSM   DASHBOARD   APPLICATION PROCESSING   UTILITY AND PROGRAM MANAGEMENT

No Dashboard Selected

Dashboard

Setting your Local Time Zone

Setting your Local Time Zone

Follow the instructions below to ensure timestamps in BEETS will reflect your local time zone.

Steps to Change Layout:

1. After logging into BEETS, click *Gear Icon* in the upper right-hand corner of the BEETS home page. (A)

2. An options screen will appear; click on **ADJUST TIME FOR MY TIMEZONE** to '*Switch ON*'. (B)

3. A confirmation notification will appear; click the *Yes* button to confirm. (C)

(C)

4. This option will now be selected; time stamps throughout the system will now reflect your local time zone. (D)

END

Return to Setup Checklist
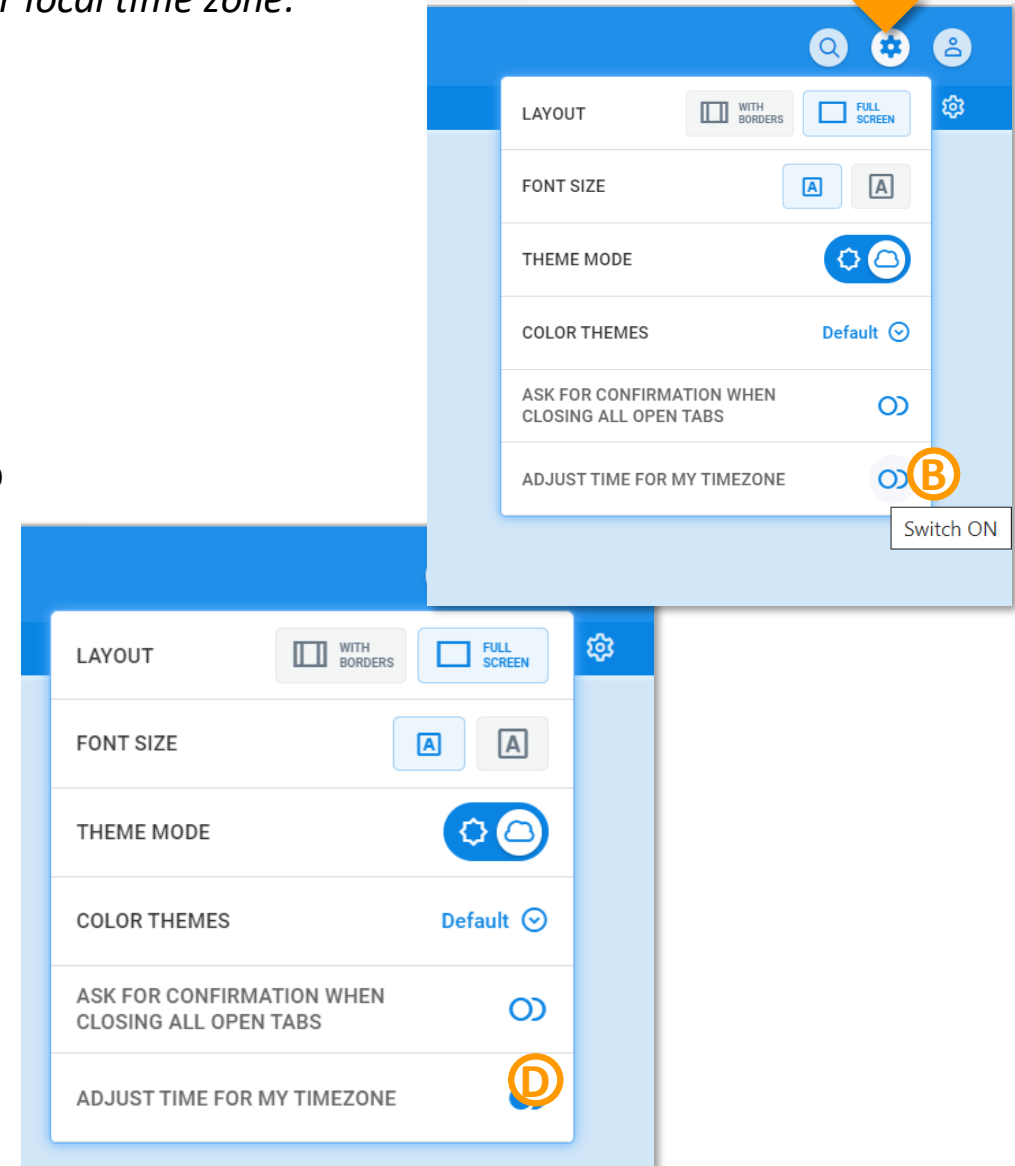
Key Dashboard Widgets:
Adding Bulk Uploader Widget to Dashboard

Adding Bulk Uploader Widget to Dashboard (All Customers)

*Some programs require applications to be submitted via Bulk Upload (see BEETS Navigation Guide > Application Entry for details). Follow the steps below to perform the 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. **A**

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

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

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

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

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). **F**

END
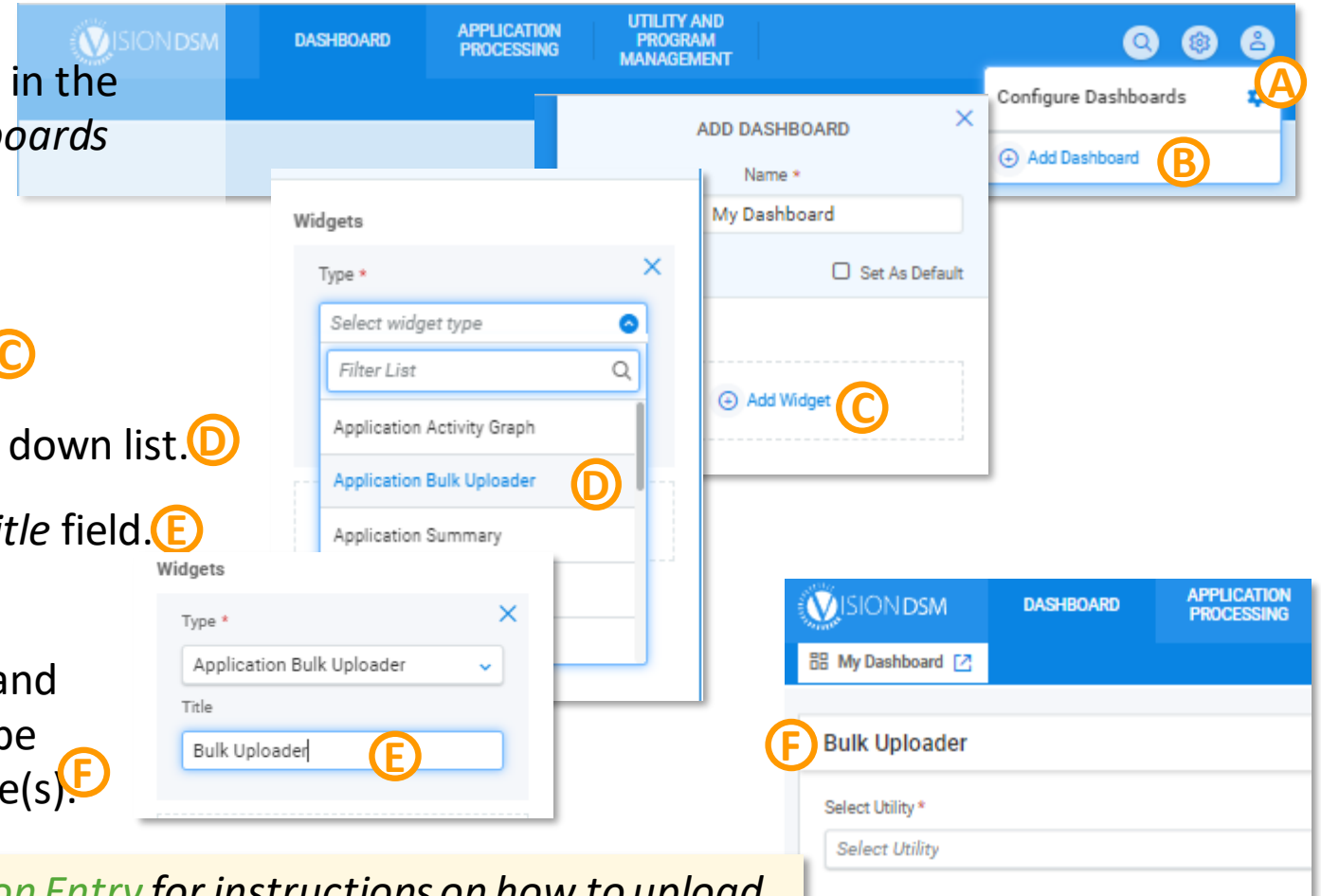
*See BEETS Navigation Guide > Application Entry for instructions on how to upload.*

Key Dashboard Widgets:
Setting up the Budget & Savings and Invoice Dashboards

Dashboard Widgets Required for Invoicing

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. The following Dashboard Widgets are needed to perform the invoicing process. Instructions on how to setup these key invoicing dashboard widgets follow.

Key Invoicing Dashboard Widgets:

Budget & Savings Dashboard (i.e. PowerBI Report): Summary of Utility EEI and performance payment budgets and savings data; referenced to ensure utility has enough funds prior to invoicing.
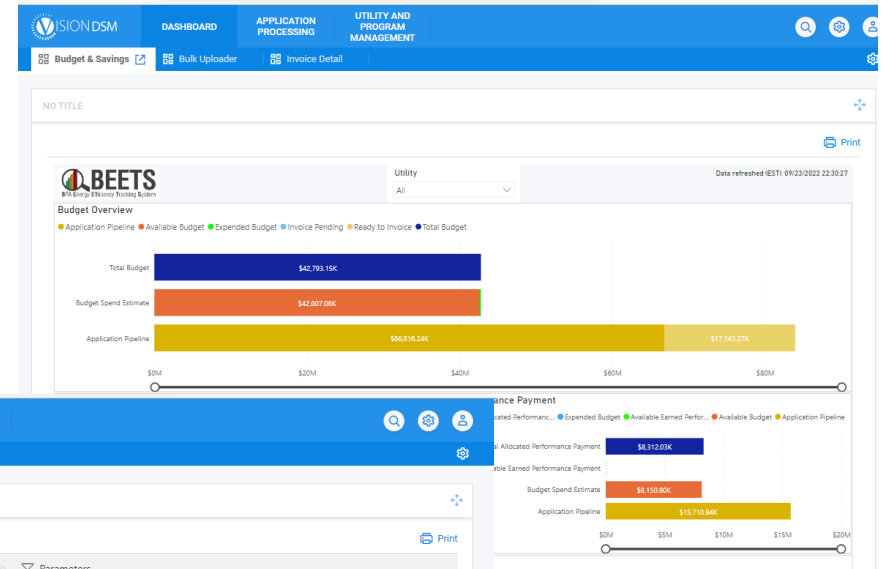
Invoice Dashboard (i.e. Paginated Report): Provides visibility into the invoice status and line item detail of applications included in a particular invoice.

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Guidance for setting up dashboards that are key reference points in the Invoicing Process. **NOTE: If you do not see these options 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 on the BEETS landing page, click on the white *Gear* icon in the upper right-hand corner. Ⓐ

2. Click on *Add Dashboard*. Ⓑ

3. Type in *Name* field to create unique dashboard name (i.e. 'Budget & Savings Dashboard' or 'Invoice Dashboard'). Ⓒ

4. Click on *Add Widget*. Ⓓ

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BPA Energy Efficiency Tracking System
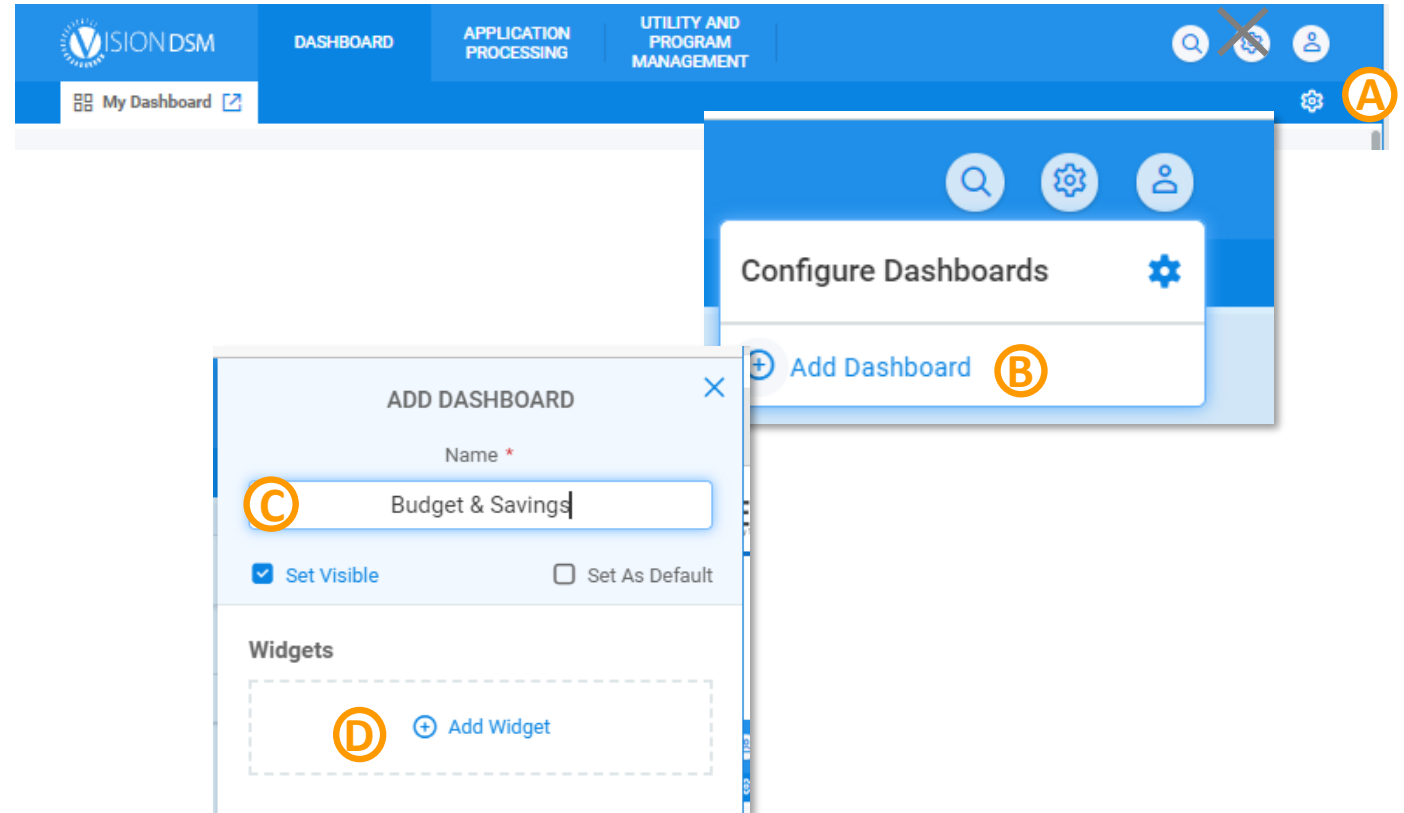
Summary of Steps, continued:

5. Select **_PowerBI Report_** from *Type* and **_BPA Dashboard_** from *Report.* NOTE: you <u>do not</u> need to enter data in *Title, Entity Type, or Entity Number*.   Ⓔ

6. Click the *Save* button. Ⓕ

7. The **_Budget & Savings Dashboard_** *tab* will appear at the top of your home screen. Ⓖ
    NOTE: Your Budget & Savings Dashboard will not display any data until your first application is entered into BEETS.

Continued on the next page….

ADD DASHBOARD ✕

Name *

Budget & Saving

☑ Set Visible   ☐ Set As Default

Widgets

Type *   ✕

PowerBI Report   ⌄

Title

_____

Report *

BPA Dashboard   ⌄

Entity Type

Select Entity Type   ⌄

Entity Number

Ⓕ **Save**   Cancel

VISION DSM   DASHBOARD   APPLICATION PROCESSING   UTILITY AND PROGRAM MANAGEMENT

⊞ Budget and Savings Dashboard ↗   Ⓖ

NO TITLE

BEETS
BPA Energy Efficiency Tracking System

Budget Overview

Utility
All
☐ Select all

Budget   Savings   Other
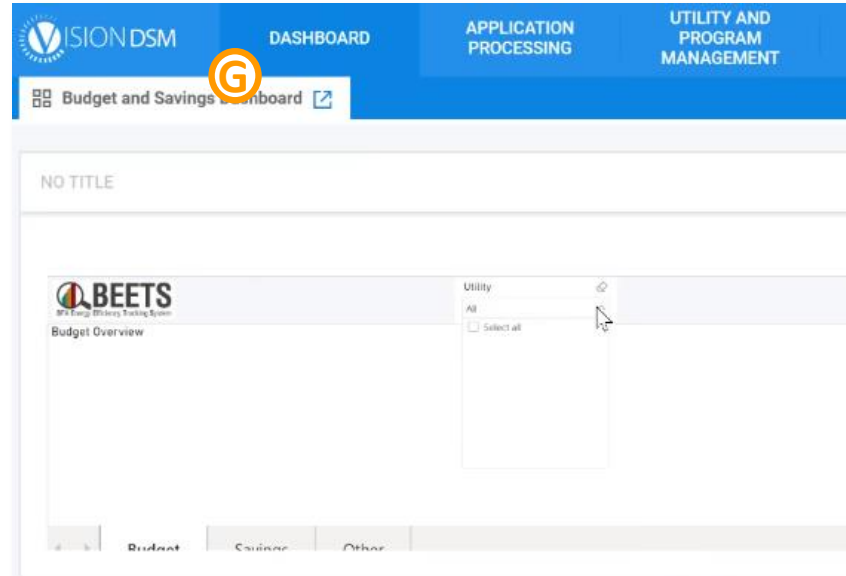
Summary of Steps, continued:

8. Repeat steps 1 – 4.

9. Select ***Paginated Report*** from *Type* and ***BPA Invoice Dashboard*** from *Report*.
    NOTE: you do NOT need to enter data in *Title, Entity Type, or Entity Number*. Ⓗ

10. Click the *Save* button. Ⓘ

11. The ***Invoice Dashboard*** will appear on your home screen (shown below).
    NOTE: Your Invoice Dashboard will not reflect any data until your first invoice is created in BEETS. **END**

See *BEETS Invoicing and Performance Payments Guide > Key Invoicing Dashboards* *for guidance on how to use these Dashboards.*

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Recommended BEETS Setup

Optional, but recommended setup to optimize your BEETS experience.

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Setting up your Utility & Program Management Pages

The Utility and Program Management tab in BEETS allows you to access applications by Utility and Program and to complete the payment approvals (i.e. invoicing) process. Complete the following steps to hide out of the box functionality that is not relevant to BPA customers.

Summary of Steps:

1. From the BEETS home page, click on the *Utility and Program Management* tab up top. Ⓐ

2. The *'All Utility'* Page will appear; click on the name of your utility *(NOTE: You will only see utilities you have access to)*. Ⓑ

3. The *Utility Page* will appear; click on the *Gear* Icon in the upper right hand corner. Ⓒ

Continued on next page….

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Summary of Steps, continued:

4. A *Configure Widgets* window will appear. **D**

5. Complete the following steps to hide both the 'Snapshot' and 'Config' widgets; which are not relevant to BPA customers:

   a) Hover over the *'Snapshot'* Show/Hide Widget icon ◑ until a *'Hide Widget'* notice appears; click to hide *'Snapshot'* widget. **E**

   b) Repeat steps above to hide *'Config'* widget also. **F**

6. Click out of the *Configure Widgets* window; now only *Programs*, *Payment Approvals*, and *Financials* tabs will appear in your Utility screen. **NOTE: The tabs you see may vary depending on your permissions; if you do not see these tab options, but believe you should, contact your EER for support.**

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Return to Setup Checklist
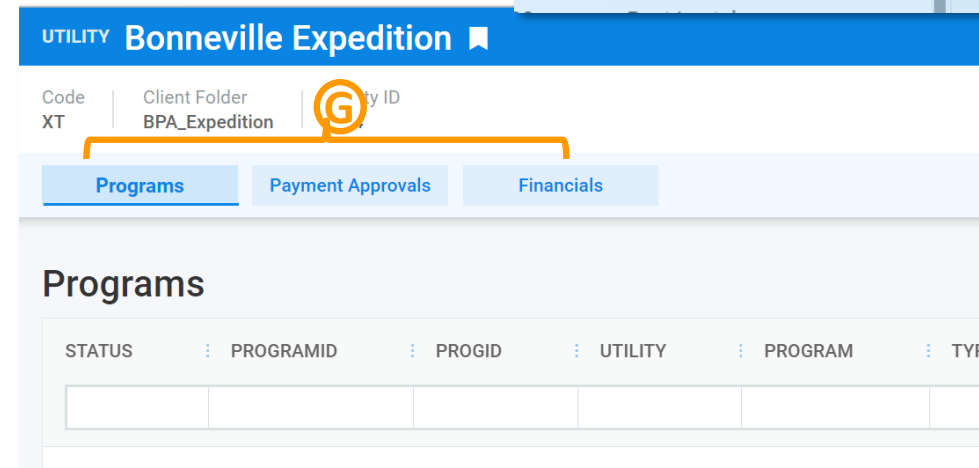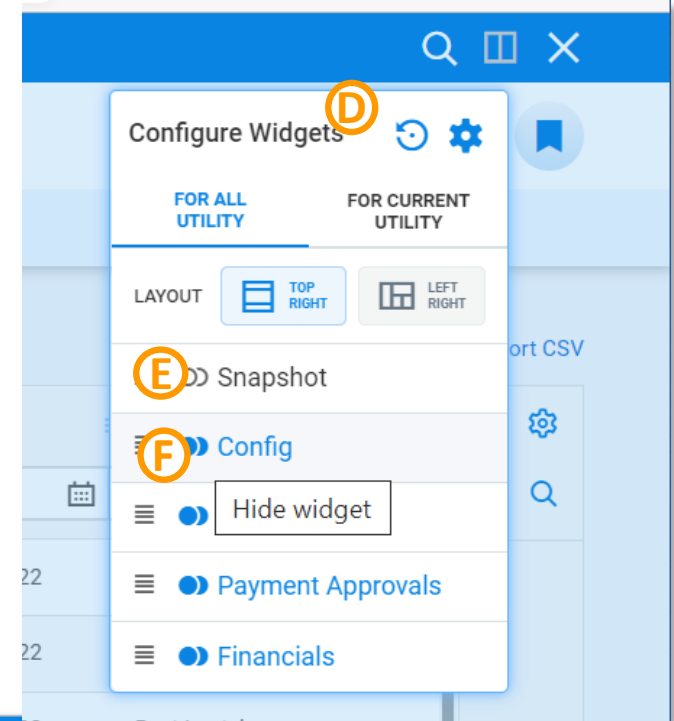
Summary of Steps, continued:

7. Click on the *Programs* tab (if not already selected) Ⓗ

8. Click on the *Program Name* of any program. Ⓘ

9. The *Programs* page will appear; click on the *Gear* Icon in the upper right hand corner. Ⓙ

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Summary of Steps, continued:

10. A *Configure Widgets* window will appear. **K**

11. Complete the following steps to hide widgets that are NOT relevant to BPA customers:

   a) Hover over the *'Snapshot'* Show/Hide Widget icon 🔵 until a *'Hide Widget'* notice appears; click to hide *'Snapshot'* widget. **L**

   b) Repeat steps above to hide *'Budgets' and 'Files'* widgets also. **M**

12. Click out of the *Configure Widgets* window; now only *Applications* and *Payments* tabs will appear on your *Programs* screen. **N** ***NOTE: The tabs you see may vary depending on your permissions; if you do not see these tab options, but believe you should, contact your EER for support.*** **END**
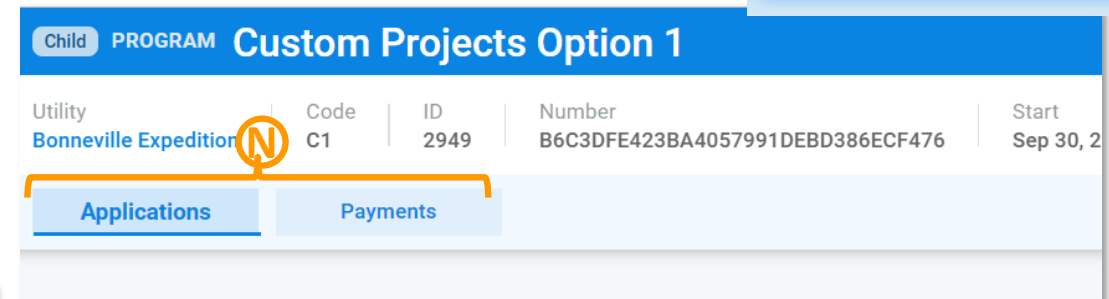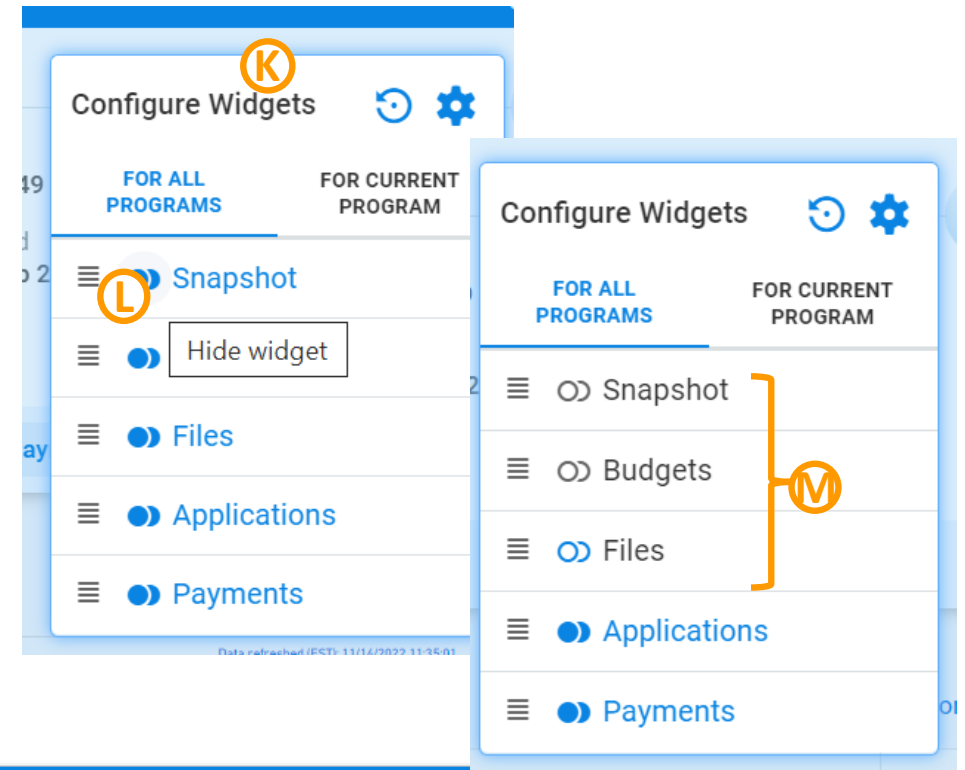
See BEETS Navigation Guide > Utility and Program Management for more guidance.

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Setting up Work Center Filters

Work Center help users more easily find applications by creating custom application filters based on Utility, Program, and Project Status. After setup, these personal filters will be saved in your account for future use.
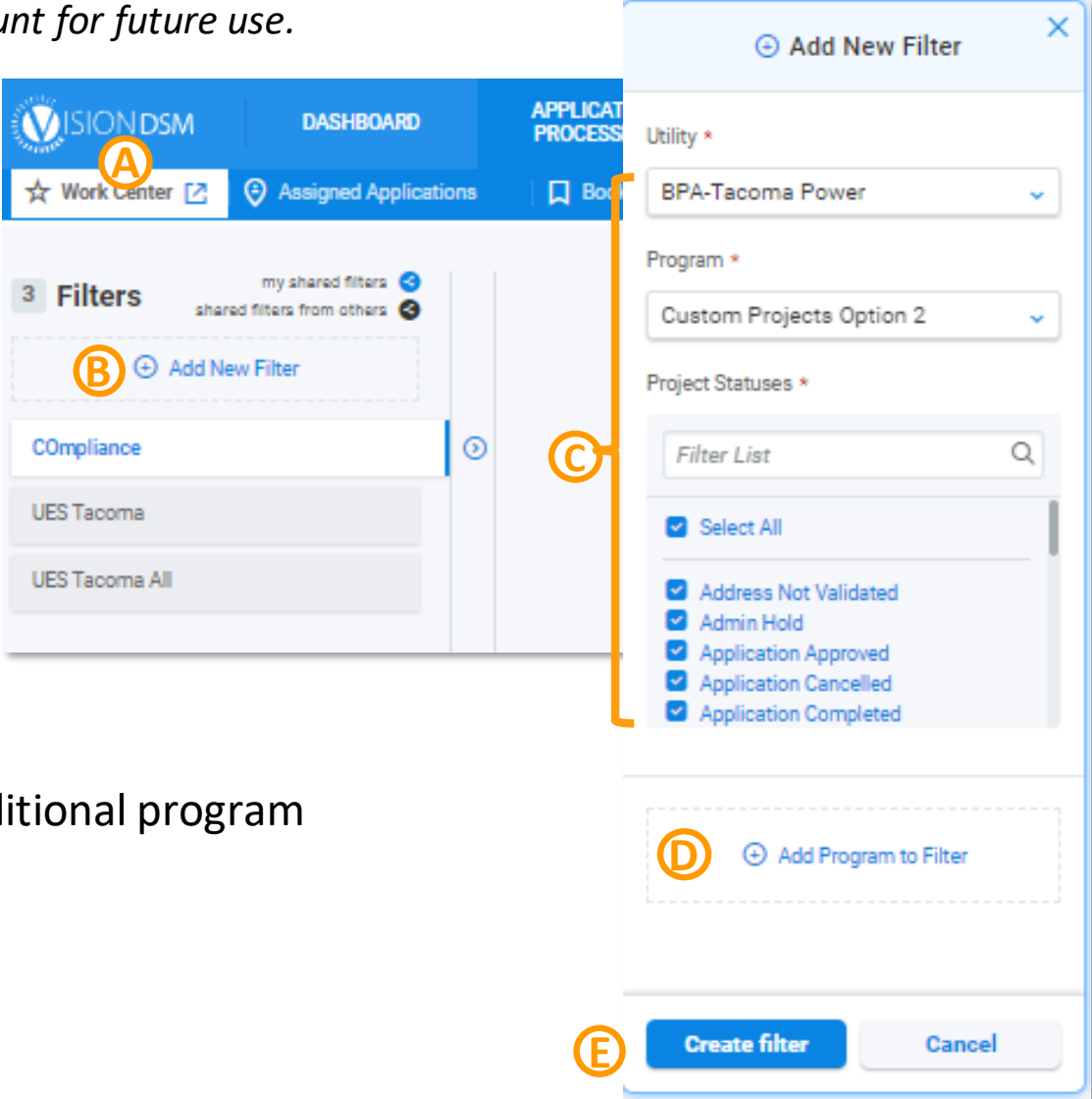
Summary of Steps:

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 your *Utility,* desired *Program, and Project Status* from the drop down menus. (C)

> 💡 **TIP:** *Recommend selecting all statuses until you become more familiar with the Workflow statuses.*

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)

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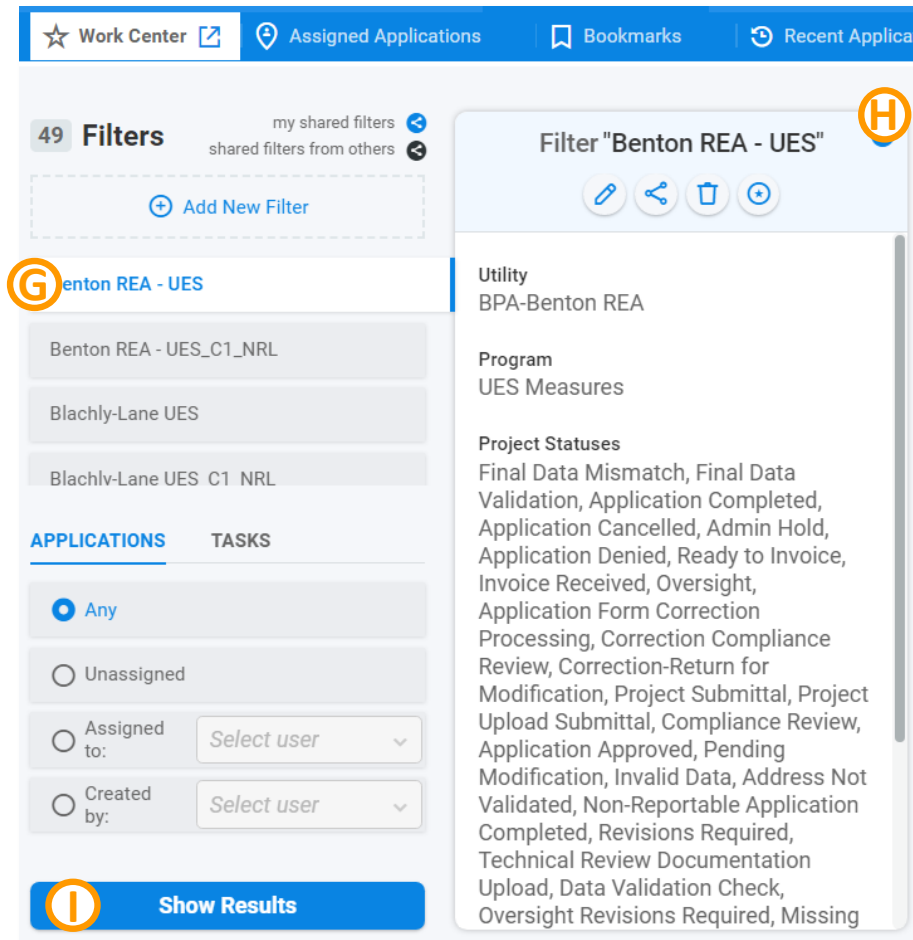
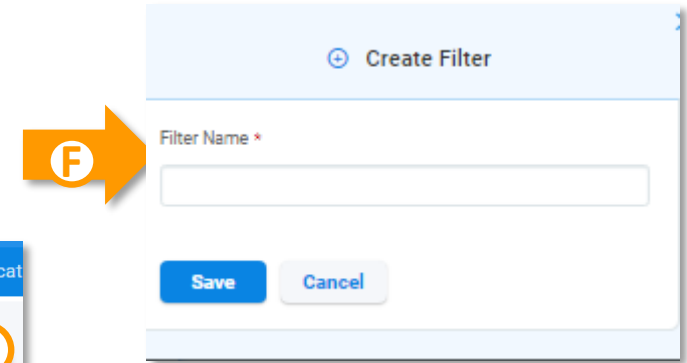**Summary of Steps, continued:**

6. When prompted, enter the *Filter Name*, and click the *Save* button. **F**

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

8. Click the blue < icon to hide the filter details **H**

9. Click *Show Results* button on bottom left to run filter. **I**

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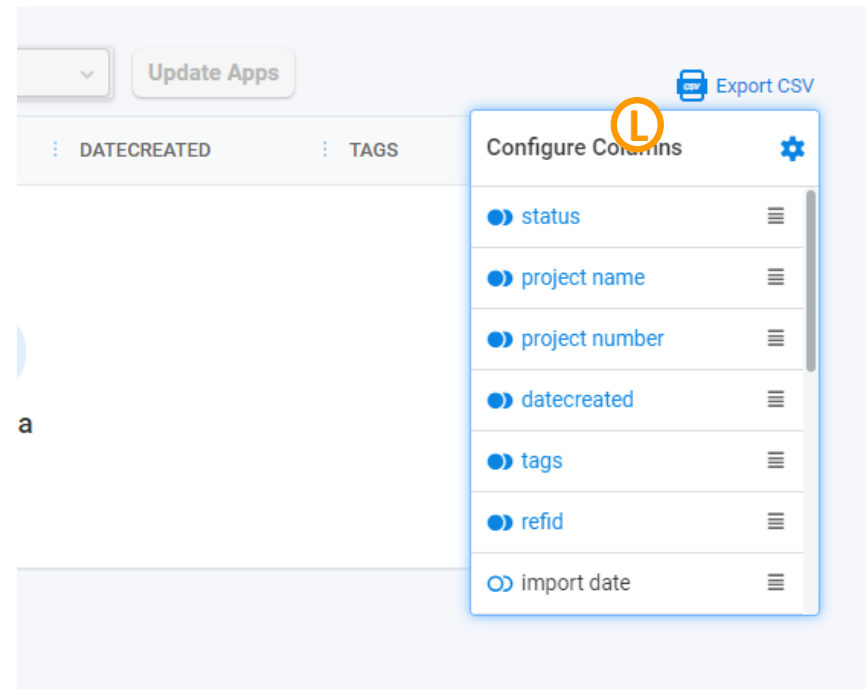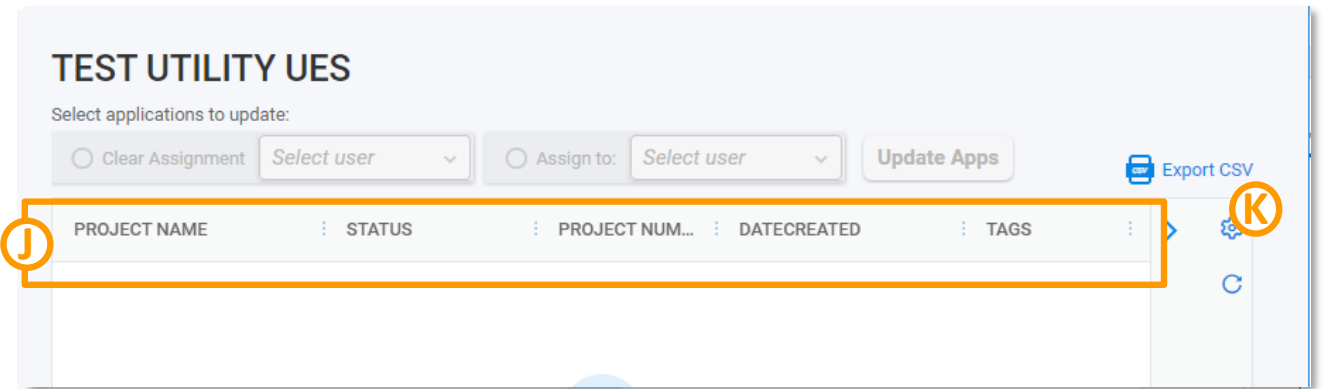
Summary of Steps, continued:

10. There will likely be no results at this point (as you likely will not have any applications in the system), but you will see column headers appear. **J**

11. Click on the *gear* icon in the upper right hand corner of the results window. **K**

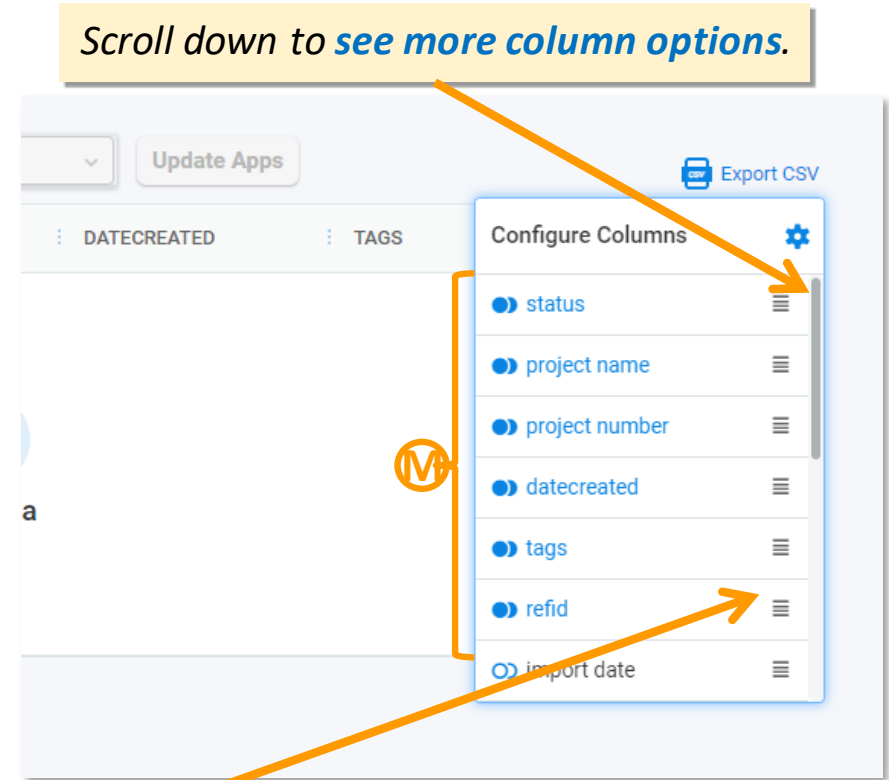12. The *Configure Columns* window will appear. **L**

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Summary of Steps, continued:

12. Click on the ⬚ symbol to the left of the column names to *Show or Hide Column* from results window. These columns options should be adjusted to personal preferences, but <u>we recommend selecting the ones shown on the right as these contain helpful application identifiers.</u> Ⓜ

13. These personal filters and settings will be available to you the next time you log into BEETS. **END**

See BEETS Navigation Guide > Application Processing > Work Center Filters for more information on using Work Center.

*Scroll down to **see more column options**.*

Update Apps   🖨 Export CSV

⋮ DATECREATED   ⋮ TAGS

Configure Columns ⚙

Ⓜ
- ◑ status   ≡
- ◑ project name   ≡
- ◑ project number   ≡
- ◑ datecreated   ≡
- ◑ tags   ≡
- ◑ refid   ≡
- ◐ import date   ≡

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

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BEETS Reports Portal

Confirming access to the BEETS Reports Portal

Return to Setup Checklist

Confirming Access to the BEETS Reports Portal (SSRS)

Complete the following steps to ensure you have the access to the BEETS Reports Module, which lives within a Microsoft SQL Server Reporting Services (SSRS) page. This site will allow you to run on demand reports on your BEETS activity.

Summary of Steps:

1. Go to SSRS by clicking on this link. **NOTE: We HIGHLY recommend that users use the Google Chrome browser to access SSRS; we have found that Microsoft Edge users have varied login experiences that may lead to issues accessing the BEETS Reports Portal.**

2. Input your BEETS Username and Password, and click the *Sign In* button. **Ⓐ** *NOTE: BEETS usernames and passwords are synced with SSRS* .

3. If your login is successful, you will be taken to the *SQL Server Reporting Services (SSRS) Home Page* as displayed in the image below. **Ⓑ**

4. If you get sent back to the log in screen, contact your EER for support; your permissions may need to be adjusted. **Ⓐ**   **END**

See BEETS Reports Portal Guide for more information on running BEETS reports.

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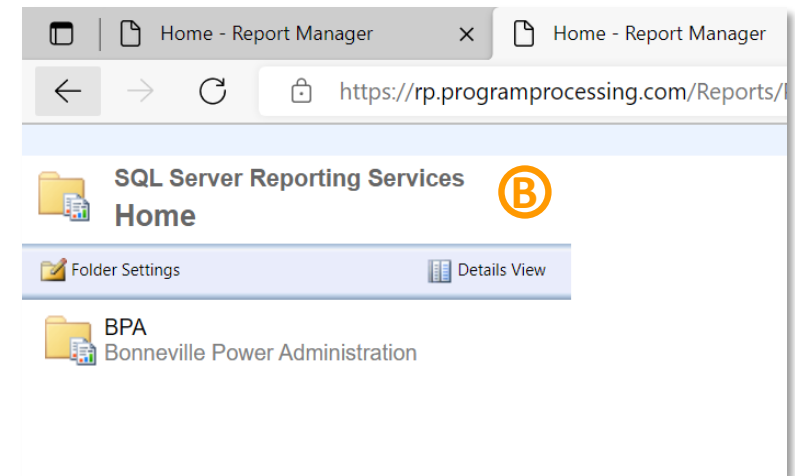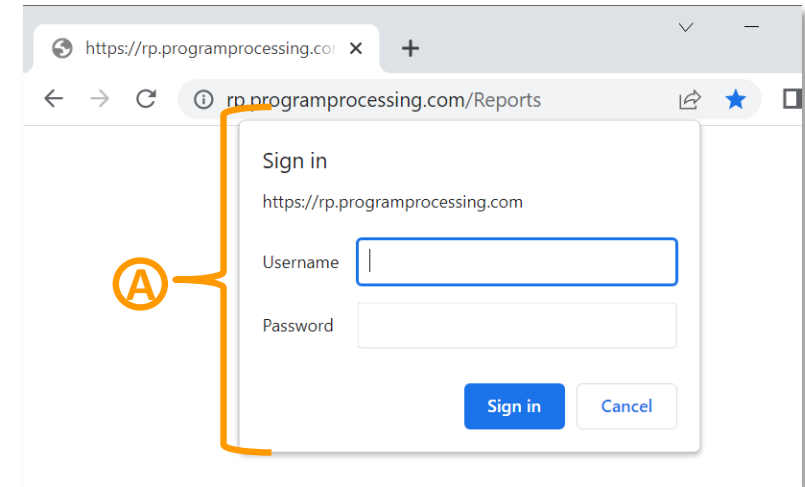
Key Links and Support Resources

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

Change Log

Date	Version	Change	Change made by:
11/15/22	1.0	Original Publishing Date	Jen Mancke

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