



# BEETS Training & Transition Update

October 18, 2022



# Today

Agenda Item	Duration	Presenter
<b>Welcome</b>	5 mins	Melissa Podeszwa, BEETSEER Lead
<b>BEETS Update</b>	10 mins	
<b>Customer Training &amp; Transition</b> <ul style="list-style-type: none"> <li>• What to expect during the transition</li> <li>• Customer Transition Support Model</li> <li>• Instructor Led Training Overview</li> </ul>	20 mins	Jen Mancke, BEETS Change Manager
<b>Q&amp;A</b>	20 min	All
<b>Next Steps</b>	5 mins	Jen Mancke, BEETS Change Manager

## BEETS Soft Launch so far...by the numbers.

*As of Friday October 14<sup>th</sup>....*

**18** utilities reported in BEETS across **7** programs

**908** applications submitted

**568** projects/measures approved through compliance

**1,150,365.5** kWh in projected busbar energy savings

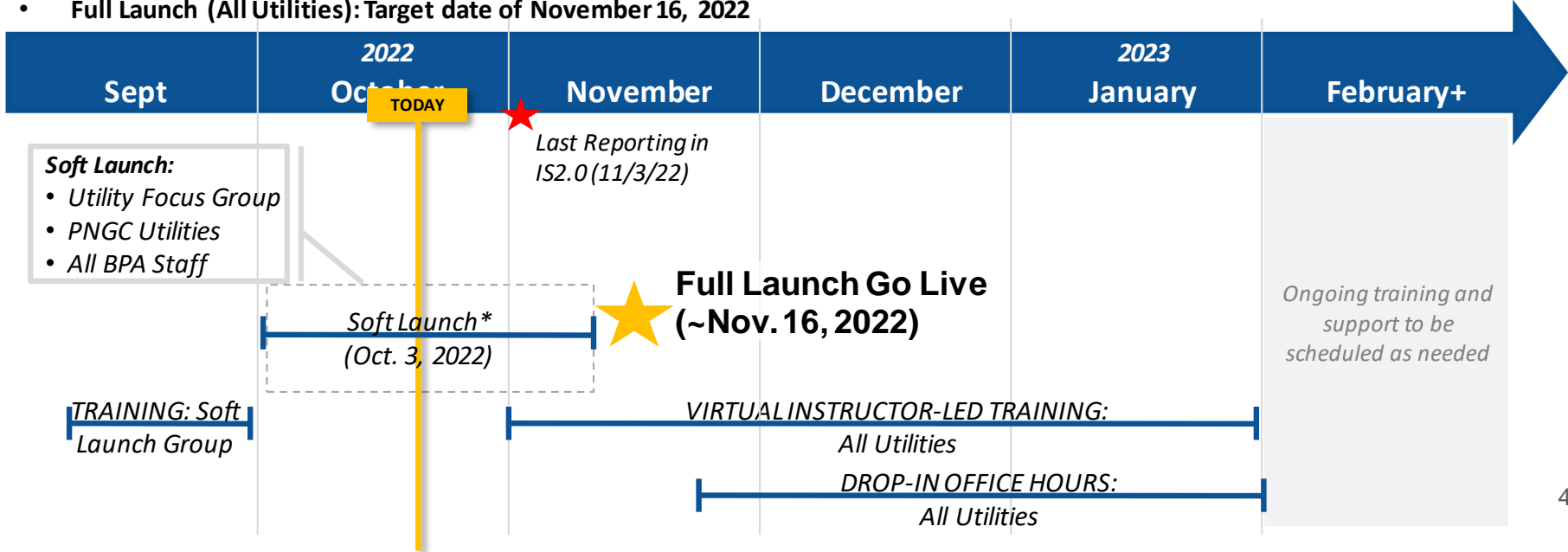
**\$1,279,281.41** in projected EEI payments

# BEETS Update & Timing

**BEETS is now live for Soft Launch Utilities! Reporting thus far has been smooth and uneventful. Transition of all utility customers is a GO for mid-November.**

Key Rollout Dates:

- ✓ **Soft Launch: October 3, 2022 (Now Live!)**
- **Last Reporting in IS2.0: November 3, 2022**
- **Full Launch (All Utilities): Target date of November 16, 2022**




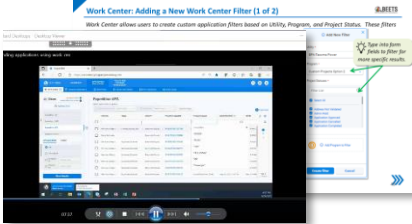


# Customer Training & Transition



# BEETS Customer Transition Support Model



In the weeks preceding and after the BEETS transition, customers will have access to multiple support channels to accommodate for different learning styles, schedules, and reporting cadences.

Facilitated	On Demand
<p><b>Instructor Led Virtual Training Sessions</b></p> <p><i>Customers can attend one or more repeat training sessions in demo format that will be offered multiple times through 2022 and into early 2023*</i></p> 	<p><b>Self-Paced Step-by-Step Training Guides and Videos</b></p>  <p><i>Training materials will be available for customers to view and download on BPA.gov at their convenience</i></p>
<p><b>Virtual BEETS 'Drop-in' Office Hours</b></p> <p><i>Customers have access to 'drop-in' office hours during the transition. These sessions provide an opportunity for users to go directly to the BEETS experts for support with initial reporting.</i></p> 	<p><b>1:1 Energy Efficiency Representative Support</b></p>  <p><i>EERs will be trained and ready to walk individual customers through any or all of their early submittals into BEETS</i></p>

\*NOTE: We recommend customers attend training sessions as close to first reporting activity as possible

## What to expect during the transition – *Before Go Live*

***Go Live Target Date 11/16/22***

### Now until Go Live

<p><b>Reporting</b></p>	<ul style="list-style-type: none"> <li>• <b>All final IS2.0 reporting must be completed by November 3, 2022 deadline</b> <ul style="list-style-type: none"> <li>○ Recommend completing all time sensitive or urgent reporting in IS2.0</li> <li>○ Custom Projects with an approved Completion Report (CRR) should be invoiced through IS2.0</li> <li>○ Reporting that cannot be submitted prior to 11/3 can then be reported through BEETS</li> </ul> </li> <li>• <b>No reporting will be accepted from 11/3 until Go Live;</b> for approximately two weeks ahead of Go Live, there will be a reporting blackout period, during which BPA completes invoice approvals in IS 2.0 and prepares BEETS</li> <li>• <b>New bulk upload templates (i.e. UES, Non-Reportable, C2, etc.) and Measure Lists will be posted to BPA.gov no later than 11/1;</b></li> </ul>
<p><b>Customer Transition Support</b></p>	<ul style="list-style-type: none"> <li>• <b>Virtual Instructor Led Training starts on November 1, 2022;</b> consists of a two module series offered multiple times to accommodate for customer availability and reporting cadences</li> </ul>

# What to expect during the transition – *After Go Live*

*Go Live Target Date*  
11/16/22

After Go Live	
<b>Reporting</b>	<ul style="list-style-type: none"> <li>• <b>All reporting will be done in BEETS after Go Live;</b> reporting must be done in BEETS as IS2.0 will no longer be accessible to customers</li> <li>• <b>In-Flight Custom Projects that <u>will not</u> invoice in time for the 11/3 transition date should be entered through the proposal process in BEETS after Go Live;</b> your ESIPs and CSEs will be on hand to guide you through the process</li> <li>• <b>When possible, hold reporting to 2023;</b> customers are welcome to report anytime, but to ensure a smooth transition, we request that non-time sensitive reporting be held until early 2023</li> </ul>
<b>Customer Transition Support</b>	<ul style="list-style-type: none"> <li>• <b>It is not expected, nor recommended, that customers submit the first few applications alone,</b> the BPA team will be available for personal walkthroughs</li> <li>• <b>Virtual Instructor Led Training continues through January;</b> consists of a two module series offered multiple times to accommodate for customer availability and reporting cadences</li> <li>• <b>BEETS Virtual Drop-In BEETS Hours start at Go Live and run through January;</b> open virtual office hours with the BEETS Project team will be offered for all users to ask questions and have support walking through early submittals</li> <li>• <b>EERS on hand to walk customers through early submittals</b></li> </ul>



## Virtual Instructor-Led Customer Training Session Modules

**Virtual training sessions will be offered for new users to build basic foundational knowledge in support of other hands on learning:**

- Led by BEETS project team & BPA system experts **to ensure information is relevant to BPA customers**
- **Sessions are interactive, but demo only**
- **Consist of a two-module series** – recommended that most utilities attend both modules at least once
- **Offered in multiple options from Go Live (Target Date 11/16) through January 2023** to accommodate for various schedules & reporting cadences; more will be offered as needed

	Module 1: BEETS 101	Module 2: Invoicing, Dashboards, and Reports
<b>Description</b>	<i>Learn how to navigate and report activity in BEETS</i>	<i>Learn how to submit EEI and Performance Payment Invoices &amp; Run Reports on BEETS Reports Portal (SSRS)</i>
<b>Length</b>	150 mins (virtual – with break)	90 mins (virtual)

## Virtual Instructor-Led Customer Training Session Dates

- **Repeat trainings will be offered multiples times** to accommodate different schedules and reporting cadences
- It is recommended that **all BEETS users attend at least one session for each module**, but customers are welcome to attend multiple sessions if helpful
- Highly recommended that customers **attend training as close to your first intended reporting as possible**
- **Training invites will be distributed via weekly announcements starting on October 20<sup>th</sup>**

	I want to start reporting in....	...so I should attend one each of these sessions:	
2022	<i>November or early December 2022</i>	<b>Module 1: BEETS 101</b> <ul style="list-style-type: none"> <li>• Tues Nov. 1, 2022, 9:30am – 12:00pm PT, or</li> <li>• Wed Nov. 2, 2022, 9:30am – 12:00pm PT</li> </ul>	<b>Module 2: Invoicing, Dashboards, and Reports</b> <ul style="list-style-type: none"> <li>• Tues Nov. 8, 2022, 10:00am – 11:30am PT, or</li> <li>• Wed Nov. 9, 2022, 10:00am – 11:30am PT</li> </ul>
	<i>Later in 2022</i>	<b>Module 1: BEETS 101</b> <ul style="list-style-type: none"> <li>• Mon Nov. 28, 2022, 9:30am – 12:00pm PT, or</li> <li>• Wed Dec. 14, 2022, 9:30am – 12:00pm PT</li> </ul>	<b>Module 2: Invoicing, Dashboards, and Reports</b> <ul style="list-style-type: none"> <li>• Tues Nov. 29, 2022, 10:00am – 11:30am PT</li> <li>• Thurs Dec. 15, 2022, 10:00am – 11:30am PT</li> </ul>
2023	<i>Early 2023+</i>	<b>Module 1: BEETS 101</b> <ul style="list-style-type: none"> <li>• Wed Jan. 4, 2022, 9:30am – 12:00pm PT, or</li> <li>• Wed Jan. 18, 2022, 9:30am – 12:00pm PT</li> </ul>	<b>Module 2: Invoicing, Dashboards, and Reports</b> <ul style="list-style-type: none"> <li>• Thurs Jan. 5, 2022, 10:00am – 11:30am PT, or</li> <li>• Thurs Jan. 19, 2022, 10:00am – 11:30am PT<sub>10</sub></li> </ul>

# Full Launch Customer Transition Calendar

	October		November					December				January
	Week of 10/17	Week of 10/24	Week of 10/31	Week of 11/7	Week of 11/14	Week of 11/21	Week of 11/28	Week of 12/5	Week of 12/12	Week of 12/19	Week of 12/26	1/2 - 1/31
<b>Key Dates</b>	Webinar (10/18) OR RT (10/18 & 10/19)	WA RTs (10/24 – 10/27)	C-BEASST RT (11/3) <b>IS2.0 Reporting Deadline (11/3)</b>		GO LIVE (~11/16)						Holiday	
<b>Customer Training and Support Channels (Training Sessions will be Recorded)</b>												
<b>Module 1:</b> BEETS 101			2x				1x		1x			Bi-Weekly
<b>Module 2:</b> Invoicing, Dashboards, and Reports				2x			1x		1x			Bi-Weekly
<b>Office Hours (90 min)</b>					Daily	11/21 & 11/22	3 - 4x	3 - 4x	3 - 4x	3 - 4x		3 - 4x (as needed)

# Q&A



## Next Steps

- If you haven't completed your **User Access forms**, please return to you EERs ASAP
- **Submit final reporting into IS2.0 no later than 11/3**; contact your EER if you have any concerns
- **Virtual Live Instructor led Training invites will be distributed in this weeks' announcements**; sign up for ones that are close to your first reporting deadline
- **Reach out to your EERs** or contact [BEETS@bpa.gov](mailto:BEETS@bpa.gov) with any questions
- **More training and support information will be posted in the next couple weeks on the [BEETS site](#) on BPA.gov**; will announce when ready

# Appendices



## Training Dates

- *Recommended sessions for those who plan to report in BEETS in November/early December:*
  - Tuesday November 1, 2022, 9:30am – 12:00pm PT (MODULE 1: BEETS 101)
  - Wednesday November 2, 2022, 9:30am – 12:00pm PT (MODULE 1: BEETS 101)
  - Tuesday November 8, 2022, 10:00am – 11:30am PT (MODULE 2: Invoicing, Dashboards, and Reports)
  - Wednesday November 9, 2022, 10:00am – 11:30am PT (MODULE 2: Invoicing, Dashboards, and Reports)
- *Recommended sessions for those who plan to report in BEETS later in 2022:*
  - Monday November 28, 2022, 9:30am – 12:00pm PT (MODULE 1: BEETS 101)
  - Tuesday November 29, 2022, 10:00am – 11:30am PT (MODULE 2: Invoicing, Dashboards, and Reports)
  - Wednesday December 14, 2022, 9:30am – 12:00pm PT (MODULE 1: BEETS 101)
  - Thursday December 15, 2022, 10:00am – 11:30am PT (MODULE 2: Invoicing, Dashboards, and Reports)
- *Recommended sessions for those who plan to report in BEETS in early 2023:*
  - Wednesday January 4, 2022, 9:30am – 12:00pm PT (MODULE 1: BEETS 101)
  - Thursday January 5, 2022, 10:00am – 11:30am PT (MODULE 2: Invoicing, Dashboards, and Reports)
  - Wednesday January 18, 2022, 9:30am – 12:00pm PT (MODULE 1: BEETS 101)
  - Thursday January 19, 2022, 10:00am – 11:30am PT (MODULE 2: Invoicing, Dashboards, and Reports)