



BPA Online Lighting Calculator User Guide



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DRAFT

Purpose

The document is a master training manual for the Bonneville Power Administration (BPA) Online Lighting Calculator (OLC). It has detailed instructions for utilities to submit a lighting calculator (LC) to BPA.

Scope

This document provides essential information and training for all user types in the OLC. User roles define the content that each individual can view and interact with. Here is an overview of each role, including a brief description and their corresponding access permissions.

- Hancock Software personnel: full access, with the ability to make code changes.
- BPA Administrators: set incentive rates, add BPA users, add utilities and trade allies, and create their administrators.
- BPA Users: add projects, edit, and regular use.
- Trade Ally Managers: trade ally administrative functions, add projects, add trade ally users, edit, and regular use.
- Trade Ally Users: utility administrative functions, add projects, edit, and regular use.
- Utility Administrators: add utility users, set utility incentives, and regular use.
- Utility User: edit and approve projects, and regular use.

Glossary of Terms

The new OLC has been built on an existing cloud-based platform. As a result, some of the names used in the past with LCs are different in the new OLC.

Previous Lighting Calculator	Online Lighting Calculator	
	Hancock Cloud	MINT
Incentive	Project cost	
Invoiced (e.g. sent to BEETS)	Status of Submitted to Utility or Submitted to BEETS	
Measures		Items
Project	Application	
Project Name	Customer Name	
Report		Proposals
Spaces (e.g. walk-in cooler)		Areas
Utility	Energy Consumption	

➤ Hancock Cloud vs. MINT

The Online Lighting Calculator consists of two parts: Hancock Cloud and MINT.

- Hancock Cloud is Hancock Software's home platform (website). This is where you start projects, manage them, and submit them to a utility or ultimately to BPA Energy Efficiency Tracking System (BEETS).
- MINT is an application that can be downloaded to a tablet or laptop for use in the field when Internet connections may or may not be available. MINT is the engine that runs energy saving calculations. The typical use case involves creating projects in Hancock Cloud, syncing them to MINT for data entry and calculations, and then syncing back to Hancock Cloud for finalization.

How To

➤ Log into Hancock Cloud <https://bpa.hancocksoftware.com/HEEC/#/login>.

➤ Create Administrator Account

BPA creates all utility administrator and trade ally manager (admin) accounts. The utility and trade ally provides the name and email address for the person who will serve as an administrator. The utility and trade ally administrators can create subsequent user accounts for their own organization. If your organization needs a new admin account, please email your request to lighting@bpa.gov.

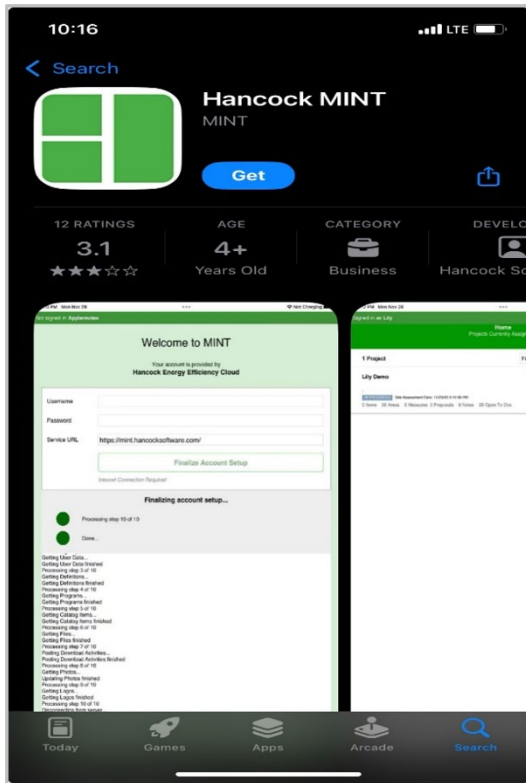
- Utility or trade ally sends a request to lighting@bpa.gov setting up an administrator account.
- Utility or trade ally administrator adds new users for your organization.
- See administrative account functions for further instructions.
- Enter your username and password sent by BPA into the login screen.
- Hancock Cloud website: [Bonneville Power Administration - Production](#).

The screenshot shows the login interface for Hancock Cloud. At the top left is the 'HANCOCK SOFTWARE' logo. At the top right are links for 'Support' and 'Single Sign-On'. The main content area is a light gray box containing a white login form. The form is titled 'Hancock Cloud - Bonneville Power Administration - Production'. It has two input fields: 'Login Name' and 'Password'. Below these fields is a green 'Sign In' button. At the bottom of the form are two links: 'Change password' and 'Forgot password?'. The footer of the page is a green bar with the text 'Copyright ©2025 Hancock Software Inc.'

➤ Installing MINT: Apple iPadOS and Macintosh computers



You can download MINT on your tablet, but it is not compatible with an iPhone.

- Go to the app store and download Hancock MINT Mobile Intake Tool.
- The Apple app store will have the most recent version of the MINT app available.
- Ensure automatic updates are selected or are prepared to check for updates every time you use the app.
- If your settings do not allow automatic updates, choose to allow them manually when available.






➤ Installing MINT: Microsoft Windows

- Go to the Hancock Software download page, link below, and select the appropriate version for your system <https://bpa.hancocksoftware.com/mint/>.
- Run the installation .exe, an install wizard will assist you with the process.

**Hancock Software
Bonneville Power Administration
MINT Production Support**

MINT Installation Page: updated 3-9-2025 5PM ET - build 1510 Production Build

 [Windows 11 64-bit standard install kit](#)
 [Windows 11 64-bit MSI for Managed Desktops](#)
 [Apple MacBook installation package](#)
[Hancock MINT \(Apple TestFlight\)](#)
[AppStore iPad/iPhone Public build 1472](#)

For organizations that do not allow individuals to install their own software, work with your organization's IT department to get the right version (usually the MSI one) installed.

Starting a Project

- Please follow the instructions below. The buttons to click are highlighted with a blue oval in the screenshot.
- Once logged into Hancock Cloud, you will see the Admin screen below or similar depending on User type.
 - Click the **Application** on the left-hand navigation menu to get started.

The screenshot shows the Hancock Software Application interface. The left-hand navigation menu is visible, with 'Application' highlighted. The main area displays a table of applications. The 'New Application' button is highlighted in the top right corner.

Client Number	Client Status	Customer Name	Customer Name 2	Total Monthly Income	Applied Date	Project Street Address	Project City	Project Zip Code
129573517	Information missing	Crabtree's Crabapples			3/20/2025	100 Main	Camas	98706
149293629	Information missing	Eric Mullendore Auto	John Hairston Automotive		3/19/2025	100 Main St	Camas	98607
655809160	Job Created	3/3 end to end copy			3/3/2025	1234	Portland	12345
1882784816	Job Created	3/3 end to end prod			3/3/2025	1234	Portland	12345
1488771233	Information missing	Child end to end test			3/3/2025	12345	Portland	98000
514254209	Job Created	3/3 Product test			3/3/2025	1234	Portland	12345
658170196	Job Created	2/27 Prod Test 3			2/27/2025	1	Portland	12345
110542414	Job Created	1234			2/27/2025	1234	Portland	12345
393573385	Job Created	2/27 Test 2			2/27/2025	12345	Portland	98000
521555896	Job Created	2/27 BPA Child			2/27/2025	1234	Portland	12345

- Click the **New Application** button on the far right top of the screen.

The screenshot shows the Hancock Software Application interface. The left-hand navigation menu is visible, with 'Application' highlighted. The 'New Application' button is highlighted in the top right corner.

- Complete the application contact information. For clarity, consider Customer Name as either the Project Name or a customer site identifier (e.g. Grocer 1), which will be transferred to MINT. Customer Name 2 is any additional info related to the project, and Customer Contact Name is the actual name of a person at the site. (Note: the asterisk (*) identifies required fields).

The screenshot shows the 'New Application' form. The form is titled 'New Application' and contains fields for Contact information (Customer Name, Customer Name 2, Customer Contact Name, Email, Project Street Address, Project City, Project State, Project Zip Code, Phone, Alternate Phone, Service Address Status, Federal Building) and Mailing information (Mailing Street Address, Mailing City, Mailing State, Mailing Zip Code). The 'New Application' button is highlighted.

-
- Application - Bonnie's Bagels - Application received
- New Application More ▾
- Bonnie's Bagels [03/26/2025] ✕
- Application Info Application Qualification
- Cancel Save Verify Address Save Settings Unit Info
- 123 MAIN ST. JEROME, NJ 07096
- Application
- Energy Consumption Click 1
- Click 2
- Remove New
- Utility Comment
- No data
- Comments
- Change History

- Consumption

Utility*

BPA Child - Electricity - 0.060

Utility Rate

0.060

Demand (\$/kW)

5,000

Comment

Cancel

Save

- Application - Bonnie's Bagels - Application received**

[New Application](#) [More](#)

Bonnie's Bagels [03/26/2025] ✕

[Application Info](#) [Application Qualification](#) [History](#)

[Cancel](#) [Save](#) [Verify Address](#) [Save Settings](#) [Unit Info](#)

Contact

Customer Name*	Customer Name 2	Customer Contact Name	Email
<input type="text" value="Bonnie's Bagels"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Project Street Address*	Project City*	Project State*	Project Zip Code*
<input type="text" value="123 ABC St"/>	<input type="text" value="Select..."/>	<input type="text" value="OR"/>	<input type="text" value="97201"/>
Phone*	Alternate Phone	Service Address Status	<input type="checkbox"/> Federal Building
<input type="text" value="(503) 503-5032"/>	<input type="text"/>	<input type="text" value="Unverified"/>	
<input checked="" type="checkbox"/> Mailing Same As Project Address			
Mailing Street Address*	Mailing City*	Mailing State*	Mailing Zip Code*
<input type="text" value="123 ABC St"/>	<input type="text" value="Select..."/>	<input type="text" value="OR"/>	<input type="text" value="97201"/>

Application

- Click the **Qualify** button.

Application - Bonnie's Bagels - Application received

Buttons: New Application, More, -, □, ×

Tab: Application Qualification

Client Allocations

Requested Allocations

Allocation	Wap Rank
No data	

Messages

Allocation Name	Messages	Date/Time
-----------------	----------	-----------

- Select the correct **Allocation (Rate Period)** by checking the box next to the allocations available, then close the window. This connects the Allocation (Rate Period) to the project.

Application - Bonnie's Bagels - Eligible

Buttons: New Application, More, -, □, ×

Tab: Application Qualification

Client Allocations

Requested Allocations

Allocation	Wap Rank
<input checked="" type="checkbox"/> RP_FY24_FY25	1

Messages

Allocation Name	Messages	Date/Time
RP_FY24_FY25	Client is Eligible	3/28/2025 2:07:28 PM

➤ Create Project

- Check the box next to the application you want to make into a project, then click **Create Project**.
- Click **OK** on **Information** popup.

HANCOCK SOFTWARE APPLICATION

Buttons: More, Process All 13 Records, Create Project, Filters, Clear Search, Save Profile, New Application

Client Number	Client Status	Customer Name	Customer Name 2	Total Monthly Income	Applied Date	Project Street Address	Project City	Project Zip Code	Phone	Alternate Phone	Email
<input checked="" type="checkbox"/> 360346222	Eligible	Bonnie's Bagels			3/26/2025	123 ABC St	Portland	97201	(503) 503-5032		
<input type="checkbox"/> 1022566550	Job Created	EZE Demo 3/27/25			3/27/2025	27 Main Street	Aberdeen	98888	(333) 222-1111		
<input type="checkbox"/> 2136249680	Job Created	3/27 MRM Child Prod Test			3/27/2025	123 NE 9th	Portland	97000	(503) 123-1234		mrmclatchie@bpa.gov
<input type="checkbox"/> 129573517	Information missing	Crabtree's Crabapples			3/20/2025	100 Main	Camas	98706	(503) 230-4000		

- After creating the project move to the **Project** tab on the left-hand navigation menu, double click the **Project Number** to open the project detail screen.

HANCOCK SOFTWARE PROJECT

Buttons: More, Process All 11 Records, Invoice, Validate, Delete, Save Profile, All, Filters, Clear Search, Export

Client Name	Project Number	Job Type	Allocation(s)	Agency	Address	County	Assessment Date	Contract
Bonnie's Bagels	0000000012		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201		3/28/2025	
alewis child app 3.28.2025	0000000031		RP_FY24_FY25	BPA Child	2323, Aberdeen, AK 55555		3/28/2025	
EZE Demo 3/27/25	0000000026		RP_FY24_FY25	BPA Child	27 Main Street, Aberdeen, WA 98888		3/27/2025	
3/27 MRM Child Prod Test	3/27 Child Prod Test		RP_FY24_FY25	BPA Child	123 NE 9th, Portland, OR 97000		3/27/2025	
3/3 end to end copy	0000000014		RP_FY24_FY25	BPA Child	1234, Portland, OR 12345		3/3/2025	

- In the Project Detail screen
 - Select the **Funding Source** (usually EEI).
 - Select the **Sector** (e.g. commercial or industrial).
 - Click the **Schedule**, then **New** to add a scheduled activity.
 - In the **Task** dropdown select **Assessment**.
 - Add the person who will do the assessment from your organization.
 - This is required to get the project sync to MINT.
 - Input **Scheduled Date**.
 - Click **Save** (Note: must complete all fields in order to sync to MINT).

This completes all the required inputs for the project initiation in the Hancock Cloud and will allow the project to sync to the MINT application.

➤ Copy and Fix a Project

- When projects are not approved by BPA in BEETS or a utility wants to fix an error, the project needs to be reworked in the Hancock Cloud and/or MINT.
- Creating a copy can also be useful for generating multiple proposals.
- The first step in copying a project is to create a new application, you must create a destination for the project you want to copy.
- Start with **New Application**.
- Once the new application is made, double click the **Project Number**.
- We created Bonnie's Bagels Proposal 2 for this purpose.

PROJECT									
Hancock SOFTWARE									
Admin									
More ▾ Process All 11 Records									
Invoice Validate Delete Save Profile All Filters Clear Search Export									
Application									
Allocation									
Project									
Invoice									
Export Data									
Project Approval									
Client Name Project Number Job Type Allocation(s) Agency Address County Assessment Date Contract									
<input type="checkbox"/>	Bonnie's Bagels	0000000032	RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201	3/28/2025			
<input type="checkbox"/>	alewis child app 3.28.2025	0000000031	RP_FY24_FY25	BPA Child	2323, Aberdeen, AK 55555	3/28/2025			
<input type="checkbox"/>	E2E Demo 3/27/25	0000000026	RP_FY24_FY25	BPA Child	27 Main Street, Aberdeen, WA 98888	3/27/2025			
<input type="checkbox"/>	3/27 MRM Child Prod Test	3/27 Child Prod Test	RP_FY24_FY25	BPA Child	123 NE 9th, Portland, OR 97000	3/27/2025			
<input type="checkbox"/>	3/3 end to end copy	0000000014	RP_FY24_FY25	BPA Child	1234, Portland, OR 12345	3/3/2025			
<input type="checkbox"/>	3/3 end to end prod	0000000013	RP_FY24_FY25	BPA Child	1234, Portland, OR 12345	3/3/2025			
<input type="checkbox"/>	3/3 Product test	3/3 Prod Test	RP_FY24_FY25	BPA Child	1234, Portland, OR 12345	3/3/2025			

- Click the **More** drop-down menu, then click **Copy Project**.

Project Detail

Project Info Client Info Building Info Validate Invoice Project History: Current More All Reports Save Cancel

Client Name: Bonnie's Bagels Address: 123 ABC St, Portland, OR 97201 County: **Copy Project**

Total Cost: \$ 0.00 Completed Date: Allocations: RP_FY24_FY25

Project Name: 0000000032 Unique Site ID: 32 Sector: Select...

Funding Source: Select...

Notes: Add Note(s) here!

Schedule

View Schedule New Save Cancel Total: 1

Activity	Task	Person	Scheduled Date	Duration Hours	Status	Last Date
Activity	Assessment	Utility Training	3/28/2025, 2:30 PM		Open	

Measure Management

Existing Conditions

Project Document List

- From the Copy Project screen, search for the application to copy the project into (recommend to sort by name); then click the **checkbox** and then click **Copy To**.

Copy Project

Clear Search

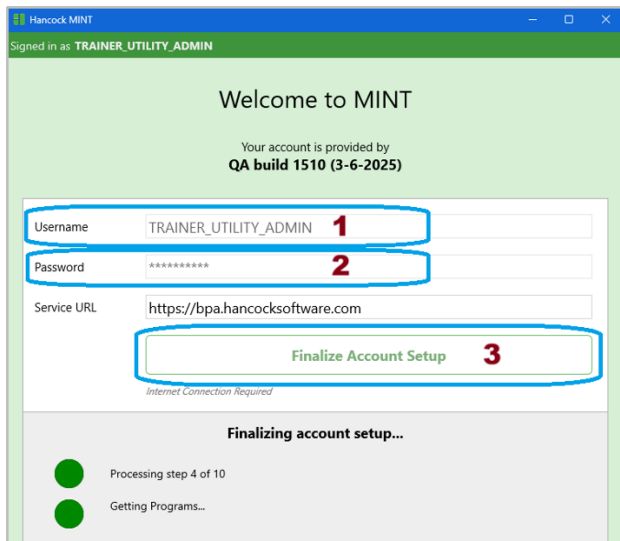
	First Name	Last Name	Client Status	Street	Apartment	State	City	Zip	Certified Date
1	Q	Q	Q	Q	Q	Q	Q	Q	Q
<input type="checkbox"/>	Bonnies Bagels	Proposal 2	Eligible	123 ABC St		OR	Portland	97201	
<input type="checkbox"/>	Child end to end test		Information missing	12345		OR	Portland	98000	
<input type="checkbox"/>	Eric Mullendore Auto	John Hairston Automotive	Information missing	100 Main St		WA	Camas	98607	
<input type="checkbox"/>	Crabtree's Crabapples		Information missing	100 Main		WA	Camas	98706	
<input type="checkbox"/>	2/27 BPA Child		Job Created	1234		OR	Portland	12345	
<input type="checkbox"/>	2/27 Test 2		Job Created	12345		OR	Portland	98000	
<input type="checkbox"/>	1234		Job Created	1234		OR	Portland	12345	
<input type="checkbox"/>	2/27 Prod Test 3		Job Created	1		OR	Portland	12345	
<input type="checkbox"/>	3/3 Product test		Job Created	1234		OR	Portland	12345	
<input type="checkbox"/>	3/3 end to end prod		Job Created	1234		OR	Portland	12345	

2 Copy To Cancel

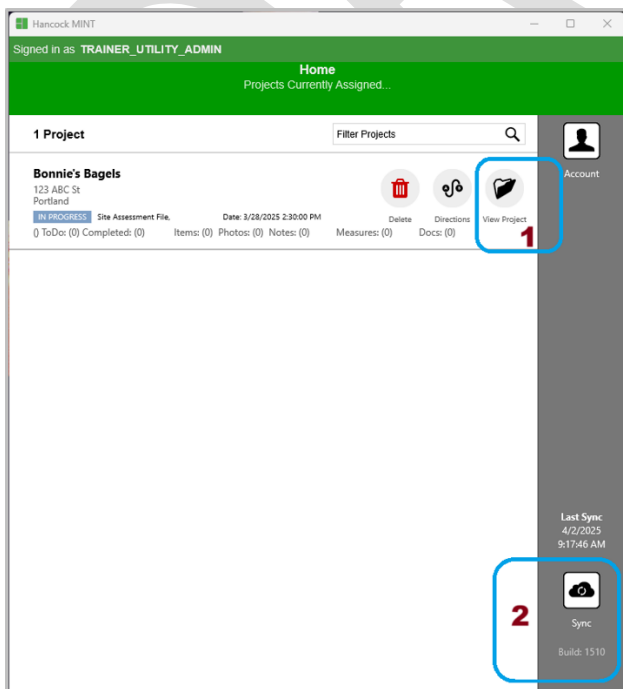
- Click **OK**.

MINT

- Open MINT on your tablet or laptop, sign in with username and password, and press Finalize Account Setup the first time you use those credentials. You will also need to finalize setup if you sign in with a different combination of username and password (e.g., an admin account vs. user account).
 - Note: this could be the same person who started the application in the Hancock Cloud or a different person assigned the assessment. Only people who are scheduled to do an assessment will can see the project after it's "synced."



- The MINT app will show that it's connecting, then show all the projects assigned to you.
 - Ensure you are connected to the internet.
 - To get the project from the Hancock Cloud to MINT, click the **Sync** button on the MINT main page.
- After sync, locate the project and click **View Project**.



- Click the **Building Info** to begin entering the project information.

The screenshot shows the 'Project Overview' page in Hancock MINT. The user is signed in as 'TRAINER UTILITY_ADMIN'. The project is 'Bonnie's Bagels' at '123 ABC St, Portland, 97201' with project ID '0000000032'. The project status is 'Site Assessment IN PROGRESS'. A blue box highlights the 'Building Info' icon in the top navigation bar. Other icons include 'Client Info' and 'Assessment Date'. The right sidebar has buttons for 'Mark Project as Done', 'Drawings', 'Photo Notes', and 'Text Notes'. The main content area shows 'Items (0/0)', 'This Project has no proposals', 'Notes Summary (0)', 'Operating Schedules (1)' with a default of 12 hours per day, and 'Documents (0)'. A 'To Do List' section includes 'Project Results' and 'Watt Savings %' (Less than 25%, Does not Qualify for Savings).

- Enter general information and answer the 4 Baseline Eligibility questions that will determine if the job is considered a retrofit or new construction.

The screenshot shows the 'Building Info' page for 'Bonnie's Bagels'. It features a 'Notes' section with 'Saved Notes...' and 'New Note' buttons. Below are input fields for 'E. Utility Cap (\$)', 'Willingness to Pay (Lesser of A,C,D,E)', and 'Watt Reduction (%)' (currently 0). The 'Baseline Eligibility' section contains four questions with dropdown menus, all set to 'No':
1. 'Is the facility or exterior lighting system newly constructed?'
2. 'Is the facility anewly constructed addition to an existing facility?'
3. 'Is there a change in the occupancy type as part of the lighting project?'
4. 'Is the project a major renovation for reasons other than lighting?'
At the bottom, a dropdown indicates 'Based on your responses the project is defined as: Retrofit'.

- Enter Project Information
- Building type (from the drop-down list),
 - Estimated project cost,
 - Space Conditioning (Heating, Ventilation, Air Conditioning (HVAC) information).

Hancock MINT

Building Info

Bonnie's Bagels

Notes

Watt Reduction (%) 0

Baseline Eligibility

Is the facility or exterior lighting system newly constructed? No

Is the facility newly constructed addition to an existing facility? No

Is there a change in the occupancy type as part of the lighting project? No

Is the project a major renovation for reasons other than lighting? No

Based on your responses the project is defined as: Retrofit

Project Information

Building Type Restaurant

Estimated/Actual Project Cost 1000

Operating Schedule

- Enter Operating Schedule (baseline for the entire site)
 - Note: if you check the “Full Year” box, the total will be 8760 hours and the days will disappear.

Hancock MINT

Building Info
Bonnie's Bagels

Notes

Saved Notes... New Note

Operating Schedule

Full Year ☐

Sunday 8

Monday 8

Tuesday 8

Wednesday 8

Thursday 8

Friday 8

Saturday 8

Weeks per Year 52

Annual Hours

Space Conditioning

- Click the **Return Arrow**, which will save your progress.

Hancock MINT

Building Info
Bonnie's Bagels

Notes

Saved Notes... New Note

Utility Bills

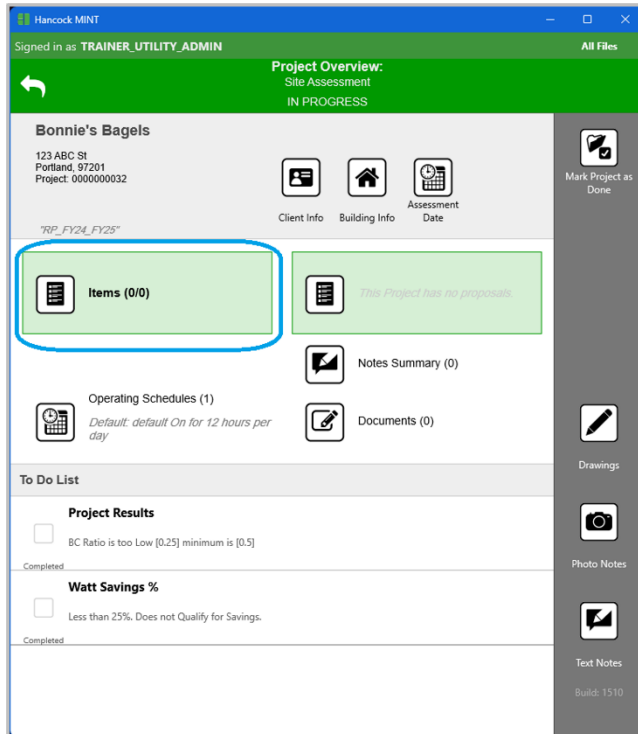
Electricity Vendor: BPA Child

Account Number:
UNIT COST NOT SET!

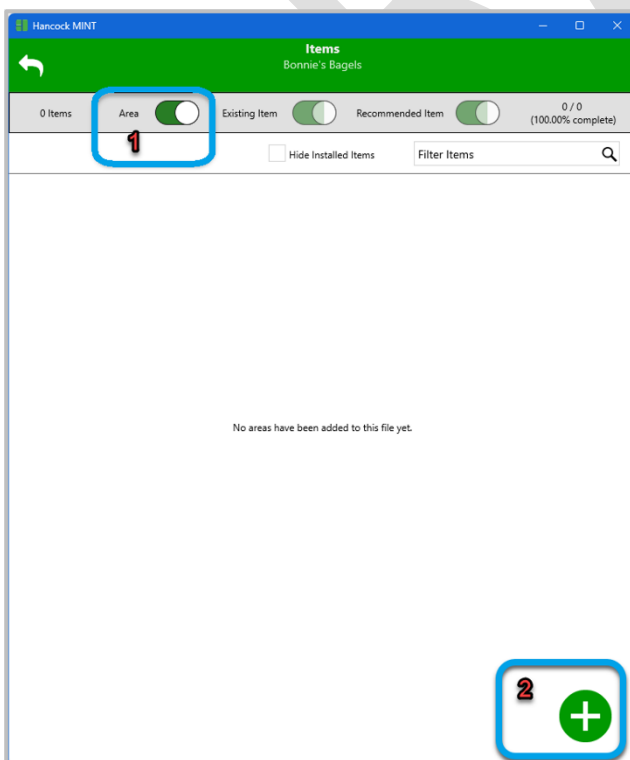
Remove Edit...

Adding Measures

- Now that the overarching building characteristics are identified, move to add specific items (measures) to each area.
 - Click the **Items**, add **Measures** which are called Items in MINT.



- You will see the Area slider is not green or ready to go
 - Move the **Area** slider and it will turn green.
 - Click the **Plus** sign circle.



- Now you can begin entering Area, existing (assuming retrofit) and replace equipment
 - Enter the Area Name where it says Area. For this example, we will use “office”.
 - After entering “office”, click the **Plus** sign across from **Lighting Existing**. This will allow the user to begin entering the existing equipment to be retrofitted.

Hancock MINT

Area and Item
Bonnie's Bagels

Office 1

Search Existing Items and Measures

Lighting Existing
Existing Catalog Item - (Lighting)
Generic item, must be changed 2 +

New Construction
Recommended Catalog Item - (New Construction)
Generic item, must be changed +

- The new screen shows the Name of the Item and Measure (change if needed to track area/installations). For example, the assessor might have other items in the office and to clarify which one they could add “exit sign,” “overhead,” or “wallpacks,” as needed to clarify.
 - Enter the general information including Name, Type (of lamp), and Quantity.

Hancock MINT

Area and Item
Bonnie's Bagels

Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

General

Name Lighting Existing in Office 1

MINT Message
Class is empty!

Type Deemed 2

Quantity 1 3

Measure Details

Recommend Done

- After updating the Quantity in the previous step, start entering the Measure Details (for the example below, we'll do a fluorescent to LED retrofit).
 - Note: the ballast factor is brought up automatically after the top sections are completed.

The screenshot shows the 'Area and Item' window for 'Bonnie's Bagels'. The 'Item info for Lighting Existing in Office' section is active. Below the 'Notes' field, there are buttons for 'Saved Notes...', 'Save Last Note', and 'New Note'. A search bar with 'General' is visible. The 'Measure Details' section is highlighted with a blue border and contains the following fields:

Field	Value
Class	T10
Category	6 ft
Subcategory	VHO Lamp/ Mag Ballast
Lamp Wattage (Deemed)	0160
Lamps per Fixture (Deemed)	0002
Ballast Factor	1.1

At the bottom of the 'Measure Details' section are 'Recommend' and 'Done' buttons.

- Enter the Controls detail (if applicable)
 - For this example, we'll use an occupancy sensor that saves 10 percent. If the Area has different HVAC or Hours, check the appropriate box and enter the appropriate information.

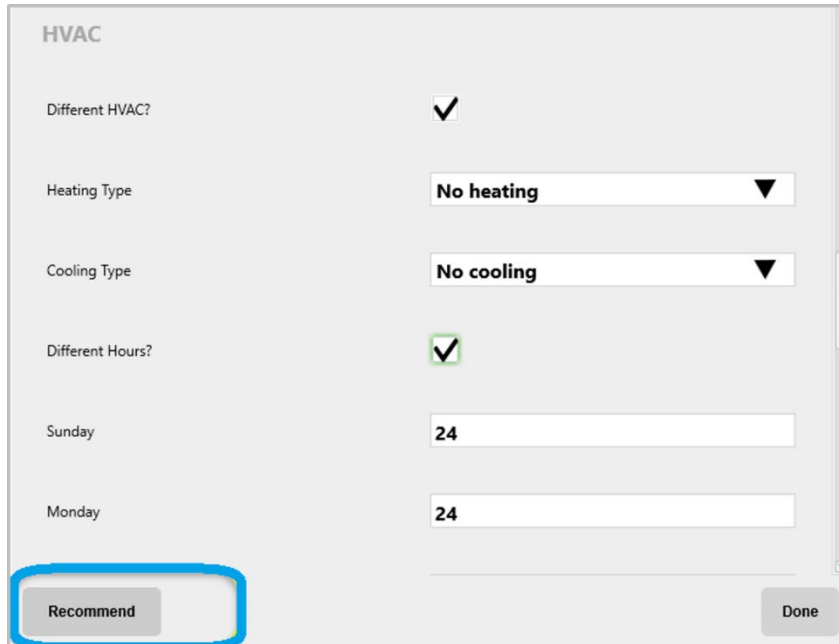
This screenshot shows the 'Controls' section highlighted with a blue border. The 'Control' checkbox is checked. Below it are three red-bordered input fields for 'Control Class', 'Quantity of controls', and 'Percent Reduction in Hours'. The 'HVAC' section below has a 'Different HVAC?' checkbox.

This detailed view shows the 'Controls' section with the following values:

Field	Value
Control Class	Occ. Sensor
Quantity of controls	1
Percent Reduction in Hours	10

The 'HVAC' section below has two checkboxes: 'Different HVAC?' and 'Different Hours?'.

- After all the existing equipment is entered, click the Recommend to open up the Replacement/Retrofit info window.



HVAC

Different HVAC? ☒

Heating Type **No heating**

Cooling Type **No cooling**

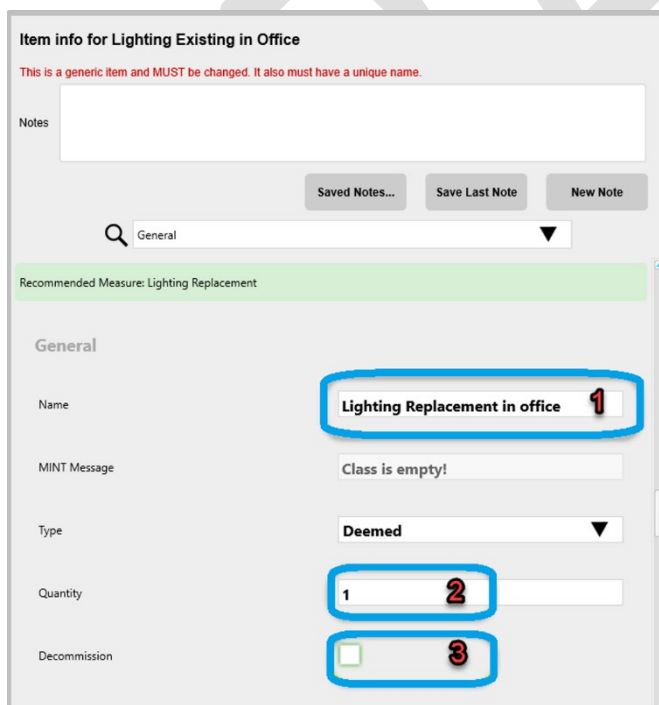
Different Hours? ☒

Sunday **24**

Monday **24**

Recommend **Done**

- Best practice for tracking existing and replacement items: It is highly recommended that the Name be updated. In this case, an update to add “in office” (so Lighting Replacement in Office) would be appropriate. This helps other people who look at the project connect existing and replacement equipment.
- If this is a decommissioning project, check the **Decommission** box and enter the appropriate information including FEWER lamps than before to complete the Measure Details section.



Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

General

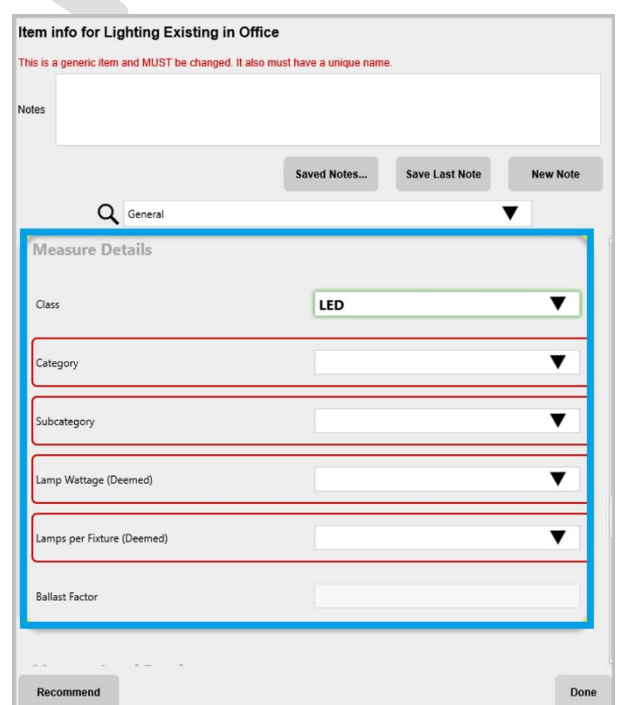
Name **Lighting Replacement in office 1**

MINT Message Class is empty!

Type **Deemed**

Quantity **1 2**

Decommission ☐ **3**



Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

Measure Details

Class **LED**

Category

Subcategory

Lamp Wattage (Deemed)

Lamps per Fixture (Deemed)

Ballast Factor

Recommend **Done**

- Note: if the project is adding controls, check that box for the existing equipment regardless of whether they’re present or not at that time. This will automatically show the controls information in the recommended section.

- For example, the same controls type and percent reduction have been entered. When the existing and retrofit equipment has been entered, MINT will show the Measure Level Results.
- When complete, click **Done** button, at lower right corner.

Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

General

Measure Level Results **1**

HVAC Interaction Factor: 1

Baseline kWh: 6167.04

Watt Reduction: 6009.36

Reduction in Watts (%): 97.443

Total Incentives (\$): 873

Adjusted Annual Savings (kWh): 6659

Recommend **2** Done

- Add measures as needed for all retrofits and better than code installations for New Construction.
 - As noted before, to move to the previous screen use the white arrow in the upper right-hand corner of the page. If the lighting replacement (in office for our example) is wrong and needs to be redone, click the **3 dots** and then **Remove** to redo the entry.

Area and Item

Office

Lighting Replacement in office

Replaces "Lighting Existing in Office"

Installed

Search Existing Items and Measures

Lighting Existing in Office

Existing Project Item - (Lighting)

Generic Item, must be changed

Lighting Replacement in office

Recommended Project Item - (Lighting)

Generic Item, must be changed

Lighting Existing

Existing Catalog Item - (Lighting)

Generic Item, must be changed

Lighting Existing in Office

Change Operating Schedule

Item Info

Remove **2**

Photos...

Lighting Replacement in office

Remove **3**

- To see the results, click the **Proposals** button.

Hancock MINT

Signed in as **TRAINER UTILITY_ADMIN** All Files

Project Overview:
Site Assessment
IN PROGRESS

Bonnie's Bagels
123 ABC St
Portland, 97201
Project: 0000000032

"RP_FY24_FY25"

Client Info Building Info Assessment Date

Items (1/1) **Proposals (1)** Notes Summary (1) Operating Schedules (1) Documents (0)

Default: default On for 12 hours per day

Mark Project as Done

- Reports: there are 3 reports available.

The first two reports are identical to the reports from the prior lighting calculator, and each is shown in a screenshot below. The third report is a way to check the kilowatt hour (kWh) and incentive if needed.

- Important: These reports can be accessed in the Hancock Cloud, open each report and click the **"Save and Submit"** button in the lower left corner of the page.

Hancock MINT

Proposals
Bonnie's Bagels

Cost Saving Analysis **1**

Select a Report from the list Summary Report **2**

Project Name: Bonnie's Bagels

Project Summary

CUSTOMER/MAILING INFORMATION		PROJECT/SITE INFORMATION	
Project Name	Bonnie's Bagels	Project/Site Address	123 ABC St
Company Name	Bonnie's Bagels	City/State/Zip Code	Portland, OR 97201
Mailing Address	123 ABC St		
Contact Phone Number	(503) 553-5532		
Contact Email			

CUSTOMER/MAILING INFORMATION		UTILITY RATE SCHEDULE	
Organization	Utility	Trade Ally	Energy Rate (\$/kWh): \$0.06
Contact Name			Demand Rate (\$/kW): \$5
Contact Phone Number			
Contact Email			

ESTIMATED PROJECT SUMMARY		This project is pending utility approval. All figures should be considered estimates.	
Estimated Annual Energy Savings	6000		
Estimated Energy Savings (Percentage)	97%		
Estimated Annual Utility Bill Savings	\$480		
Estimated Install Costs	\$1000		
Estimated Incentive	\$700		

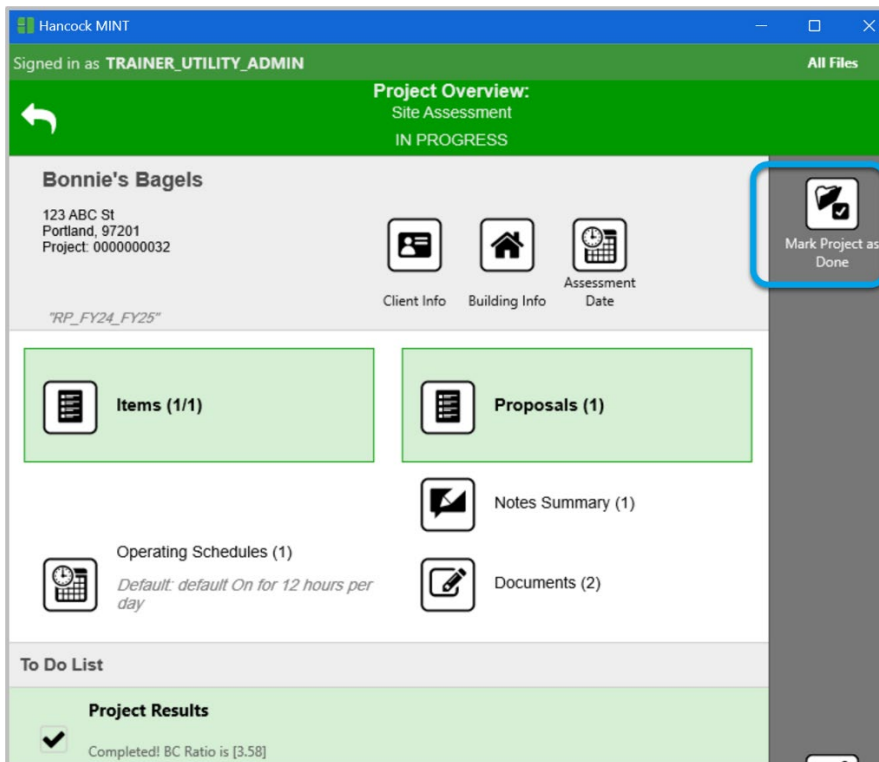
Itemized Measure #	Existing	Proposed	Controls	Savings	Efficiency	Notes per Future Incentives
8780 Office	2 T10 6 RWHQ Lamp/ Mag Ballast 160W/lamp 2 lamps/circuit	1 LED Gen. Indoor / Outdoor Standard 20W/lamp 1 lamp/circuit	1 x Occ. Sensor(s) 10 % Reduction	Baseline Proposed Savings (% decrease) 6000/97%	6167 175	Decommissioning: 1 Lighting Replacement in office: 6658 kWh at \$0.13/kWh (\$863) Controls: Occ. Sensor@ \$10 each (10)

Updated 03/19/2025 12:00 (EST)

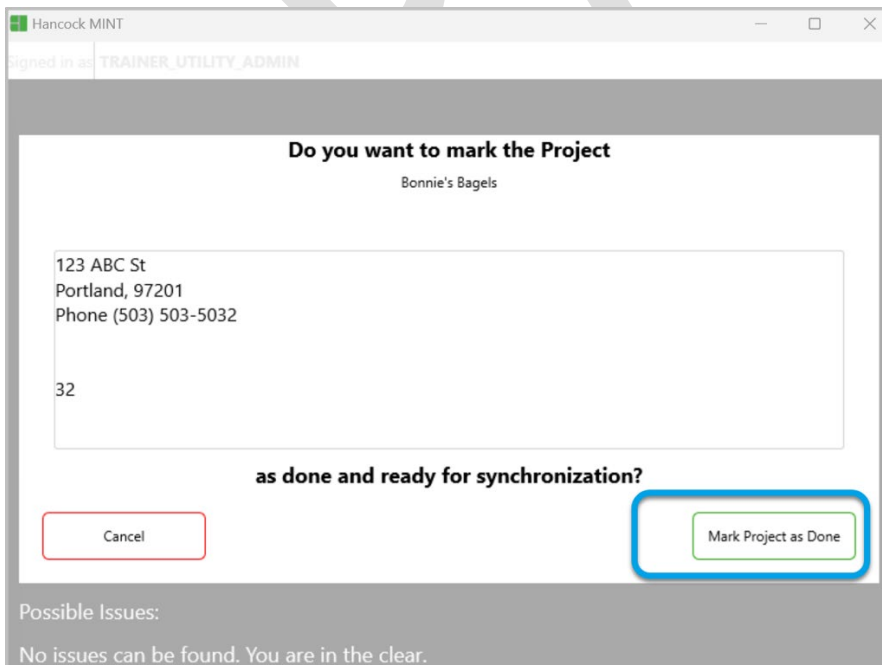
Save and Submit **3**

- When done, use the return arrow and get back to the main page, click the Sync button, then the information will be sent to the Hancock Cloud.

- When done in MINT. When the project is 100 percent completed in MINT, click the **Mark Project as Done** button.
 - Note: this will remove the project from the front page of MINT.
 - You'll have one more chance to back out if needed.



- After clicking the **Mark Project as Done**, return to the main page, and sync MINT back to the Hancock Cloud. Please ensure you are connected to a network when you sync.



- Ensure you sync the project again after you Mark Project as Done.

Finishing Project in the Hancock Cloud

- Now that the project has synced from MINT back to the Hancock Cloud, it is time to send it to the utility. Click the **Project** button and find the project to be moved along (invoiced). Our example is project 0000000140. Double click the **Project Number** to open it.

Client Name	Project Number	Job Type	Allocation(s)	Agency	Address	County
EZE Part 1 of 6 Video	000000053		RP_FY24_FY25	BPA Child	10 Main St., Aberdeen, WA 98888	
4/4 SFTP Prod Test	4/4 SFTP Prod Test		RP_FY24_FY25	BPA Child	1234, Portland, OR 97000	
Practice project for video scripts Part 1	000000043		RP_FY24_FY25	BPA Child	111 Maple Rd., Aberdeen, WA 98887	
Denny's Copy	000000036		RP_FY24_FY25	BPA Child	1234, Portland, OR 12345	
3/31 MRM Test	000000035		RP_FY24_FY25	BPA Child	905 NE 9th, Portland, OR 97000	
Bonnie's Bagels Proposal 2	000000034		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201	
alewis child app 3.28.2025 (PROPOSAL 2)	000000033		RP_FY24_FY25	BPA Child	5232332, Aberdeen, AK 55555	
Bonnie's Bagels	000000032		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201	
alewis child app 3.28.2025	000000031		RP_FY24_FY25	BPA Child	2323, Aberdeen, AK 55555	
EZE Demo 3/27/25	000000026		RP_FY24_FY25	BPA Child	27 Main Street, Aberdeen, WA 98888	

- Open the **Measure Management** and click the **Assign Allocation** line from the dropdown menu to connect to the correct rate period.

Project Detail

Project Info | Client Info | Building Info | Validate | Invoice

Client Name: Bonnie's Bagels | Address: 123 ABC St, Portland, OR 97201 | County: | Total Cost: \$ 873.00 | Completed Date: | Allocations: RP_FY24_FY25

Project Name: 000000032 | Unique Site ID: 32 | Sector: Select...

Funding Source: Select...

Notes: Add Note(s) here!

Schedule

View Schedule

Activity	Task	Person	Scheduled Date	Duration Hours	Status	Last Date
Activity	Assessment	Utility Training	3/28/2025, 2:30 PM		Open	4/8/2025 10:42:23 AM

Measure Management

Measure Management | Assign Allocation

Existing Item	Class Identify	Measure Name	Measure Unit	Item Count	Total Cost	Contractor	Order
Lighting Existing in Office	Lighting	Lighting Replacement in office	EA	1	\$873.00		

- Choose the correct allocation (rate period), check the **box**, then click the **Apply** button.
 - Note: if not entered via MINT, enter the total costs to proceed.

Measure Management

Assign Allocation | RP_FY24_FY25 | Apply

Class Identify	Area Name	Measure Name	Invoice Status	Total Cost	Remaining Amount	RP_FY24_FY25
Lighting	Office	Lighting Replacement in office		\$873.00	\$873.00	
Total				\$873.00	\$873.00	

Existing Conditions

Project Document List

- Click **X** on the upper right to return to the **Project** section.
- Click the **small box** next to the project, then click the **Invoice** button.

Client Name	Project Number	Job Type	Allocation(s)	Agency	Address
E2E Part 1 of 6 Video	0000000053		RP_FY24_FY25	BPA Child	10 Main St., Aberdeen 98888
4/4 SFTP Prod Test	4/4 SFTP Prod Test		RP_FY24_FY25	BPA Child	1234, Portland, OR 97201
Practice project for video scripts Part 1	0000000043		RP_FY24_FY25	BPA Child	111 Maple Rd., Aberdeen WA 98887
Denny's Copy	0000000036		RP_FY24_FY25	BPA Child	1234, Portland, OR 12345
3/31 MRM Test	0000000035		RP_FY24_FY25	BPA Child	905 NE 9th, Portland 97000
Bonnie's Bagels Proposal 2	0000000034		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201
alewis child app 3.28.2025 (PROPOSAL 2)	0000000033		RP_FY24_FY25	BPA Child	5232332, Aberdeen, WA 98555
Bonnie's Bagels	0000000032		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201
alewis child app	0000000031		RP_FY24_FY25	BPA Child	2323, Aberdeen, AK 99501

- Confirm the correct allocation has been entered, then pick an invoice number or New Invoice checkbox (used for our example), then click the **Save** button.

Create Invoice

All Allocations ☐

Allocation: RP_FY24_FY25 **1**

New Invoice ☒ **2**

Reporting Month: 2025-03

Invoice Number: Select Invoice

3 Save Cancel

- Go to the Invoice page, find the project, double click the **invoice number** to get the Direct Costs View screen.
 - Click the **Checkbox** and then press the **Submit Invoice** button.

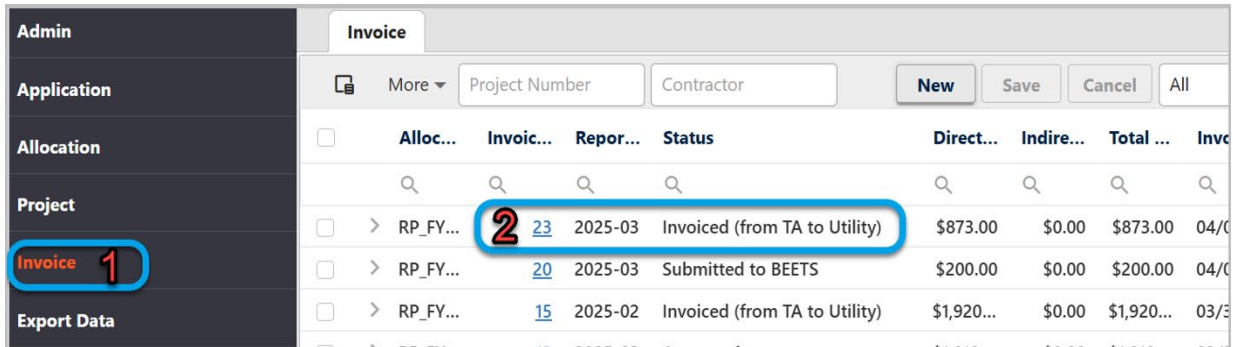
Alloc...	Invoic...	Repor...	Status	Direct...	Indire...	Total ...	Invoic...	Paym...	Paym...	Agency	Attached Invoice
RP_FY...	23	2025-03	Open	\$873.00	\$0.00	\$873.00				BPA C...	...

Project Number	Client Name	Contractor	Submit Status	Message	Address	Total Cost
0000000032	Bonnie's Bagels		Open		123 ABC St, Portland, OR 97201	\$873.00

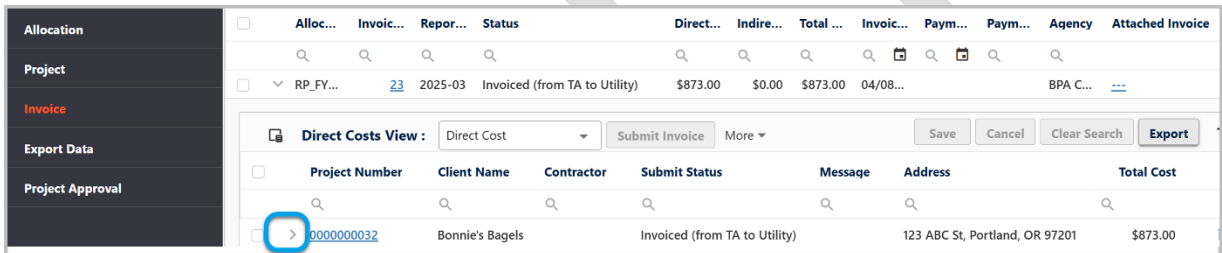
- The Status will be Invoiced (From TA to Utility).

Utility Work

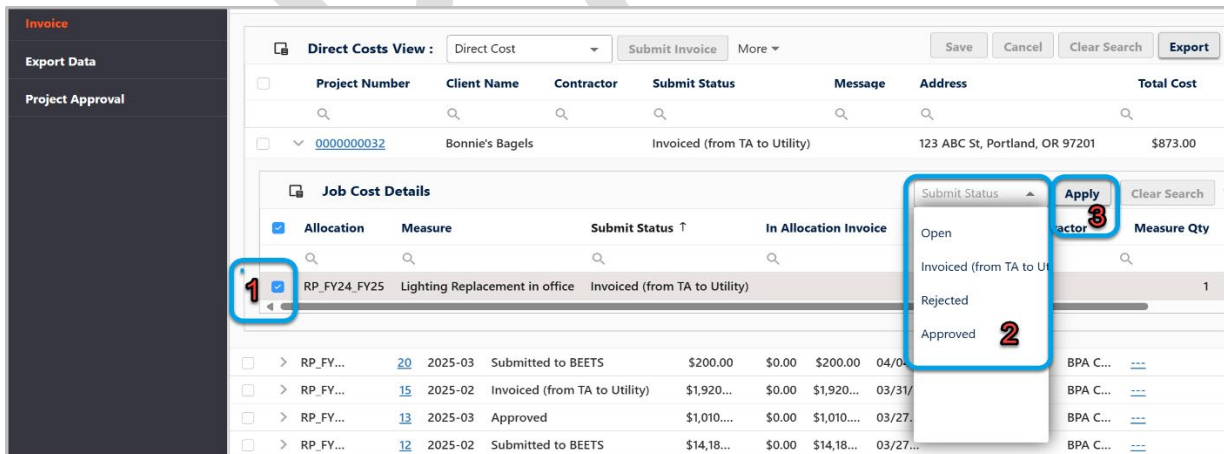
- After the trade ally submits the package/project to the utility, it is the utility's turn to review and process it.
 - From the Invoice on the left-hand navigation menu, the options vary depending on the user and their type (e.g. Invoice screens will be different for trade allies vs. utilities).
 - Click the **Invoice** on the left-hand navigation menu, then click the **Invoice Number**.



- With the Direct Costs View screen open, check the **checkbox** next to the job number and click the **arrow (caret)** to get to Job Cost Details.



- Select the **Job** with the checkbox in the **Job Cost Details** section, go to the **Submit Status** (drop down menu) box and select **Approved**, then click the **Apply** button.



- Return to the Invoice on the left-hand navigation menu, then double-click the **Invoice Number**.
 - Click the **checkbox** next to the Project Number and click the **Upload Projects** button. This will change the status and confirm it was uploaded.

- You will note the submit status has been changed to Submitted to BEETS.

Congratulations! Your Project has been submitted to BEETS!

Utility Incentive Cost Adjustments

- The process to update a Utility Incentive Cost is currently a BPA Administrative function in the Hancock Cloud.
- To request a Utility Incentive Cost adjustment, please submit a request to lighting@bpa.gov.

New Construction in MINT

- Enter the project in the Hancock Cloud as described above and sync with MINT.
 - Click the **View Project** button in MINT.
 - Note: using the customer's name or project name to ID the project as new construction is very helpful in identifying the project in MINT.

- Click the **Building Info** button and start the entries to make it a New Construction Project.

Hancock MINT

Signed in as **TRAINER UTILITY_ADMIN** All Files

Project Overview:
Site Assessment
IN PROGRESS

Bonnie's Bagels Proposal 2
123 ABC St
Portland, 97201
Project: 0000000034

"RP_FY24_FY25"

Client Info **Building Info** Assessment Date

Items (0/0)

This Project has no proposals.

Notes Summary (0)

Operating Schedules (1)
Default: default On for 12 hours per day

Documents (0)

Mark Project as Done

- Selecting “yes” to any of the Baseline Eligibility questions will make the project New Construction, Scroll down to the Baseline Eligibility section.

Building Info
Bonnie's Bagels Proposal 2

Notes

Saved Notes... New Note

A. Itemized Incentive

C. % of Project Cost

D. \$ per kWh

E. Utility Cap (\$)

Willingness to Pay (Lesser of A,C,D,E)

Watt Reduction (%) 0

Baseline Eligibility

Is the facility or exterior lighting system newly constructed?

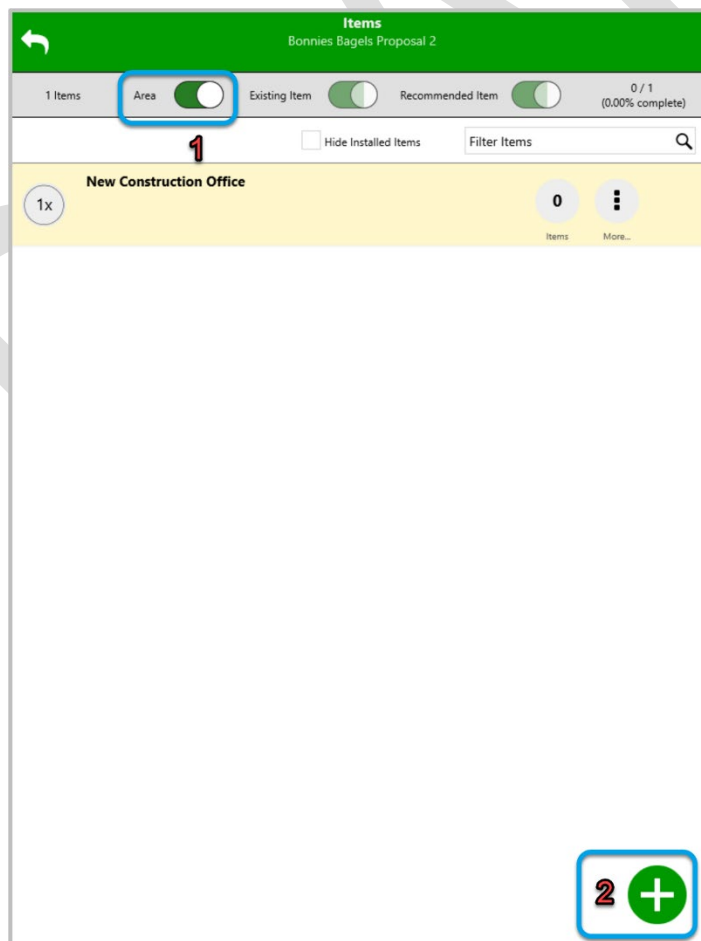
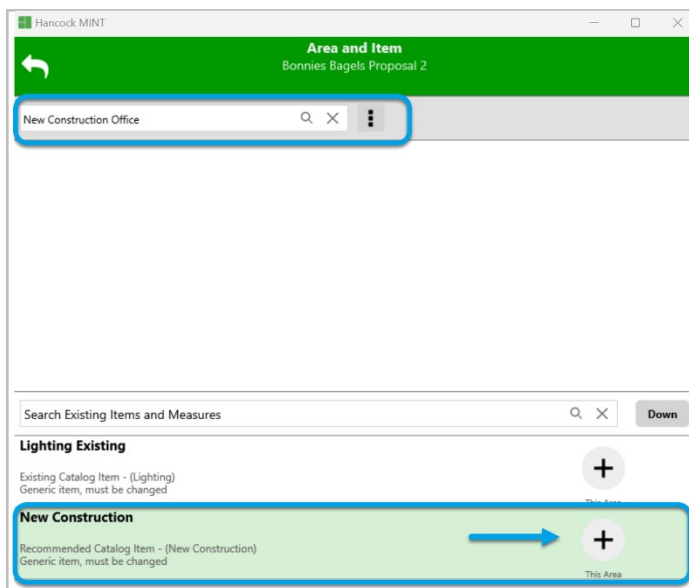
Is the facility newly constructed addition to an existing facility?

Is there a change in the occupancy type as part of the lighting project?

Is the project a major renovation for reasons other than lighting?

Based on your responses the project is defined as:

- When all required info is entered (Note: red box and red asterisks indicate required items), MINT will do its calculations.
- Next hit the **back arrow**.
 - You will need to click the **Items**.
 - Click the **Area** slider.
 - Click the green **Plus** circle.
 - In the **Area** box, type in the name of what you want the Area to be.



Administrative Account Functions

- Adding users by administrators. Only users with administrative functions can add others to their organization. To add a user to your organization, log in with the administrative username and password. Then, click **Admin** on the left-hand navigation menu, locate the appropriate organization Name and click the **Short Name**.

The screenshot shows the Hancock Software Admin interface. The left sidebar contains navigation links: Admin, Application, Allocation, Project, Invoice, Export Data, and Project Approval. The main content area is titled 'ADMIN' and shows a table of users. The table has columns: Short Name, Organization Name, Inactive, Org Code, Business Type, Business Function, FED Tax ID, State Tax ID, and Email. The first row is highlighted with a red box and labeled '2'. The 'Users' tab is selected, and the 'Add' button is highlighted with a red box and labeled '4'. The user 'BPA Child' is selected, and the 'Add' button is visible.

Short Name	Organization Name	Inactive	Org Code	Business Type	Business Function	FED Tax ID	State Tax ID	Email
BPA Child	BPA Child	<input type="checkbox"/>	12345	Utility				

Login Name	Full Name	External User ID	Address	Zip	City	State	Email
Hugh_BPA_Child_1	Hugh_BPA_Child	hwfraser@bpa.gov					1000000035@donotsend.com
bill_crabtree_bpa_child	Bill Crabtree		905 NE 11th St	97214	Portland		wecrabtree@bpa.gov
mrmclatchie@bpa.gov	Matt McLatchie						mrmclatchie@bpa.gov
Matt_McLatchie_BPA_Child	Matt McLatchie_BPA_Child						mrmclatchie@bpa.gov
Matt_BPA_Child_User	Matt_BPA_Child_User						mrmclatchie@bpa.gov
aaron_child_admin	Aaron child admin						arlewis@bpa.gov
TRAINER_UTILITY_ADMIN	Utility Training		123 ABC St	97201	Portland		btgraves@bpa.gov

- Click the **Add** button, you will see the Add/Edit Organization User screen (which has been completed and ready to save below).
 - All the fields with the red asterisk are required.
 - It is best practice to require a password change – check the Required Reset Password.
 - The Field Role is also required in order to move projects between the Hancock Cloud and MINT.
 - Click **Save** and the new person has been added. The only Program Template is “Primary.” After clicking **Save**, click the X at the top right of the screen.

The screenshot shows the 'Add/Edit Organization User' form. The form contains several fields, some of which are marked as required with a red asterisk. The 'Authentication Type' is set to 'Sql Authentication'. The 'Login Name' is 'TRAINER_UTILITY_User2'. The 'Full Name' is 'John Trainer'. The 'Phone' is '503-503-5032'. The 'Address' is '123 ABC St'. The 'City' is 'Portland'. The 'BPI Number' is empty. The 'User Role' is 'Utility User'. The 'Field Role' is 'Auditor'. The 'Program Templates' are 'Primary'. The 'Required Reset Password' checkbox is checked. The 'Inactive' checkbox is unchecked. The 'Unlock User' checkbox is checked. The 'Email' is 'btgraves@bpa.gov'. The 'ZIP' is '97201'. The 'State' is 'OR'. The 'BPI Expiration Date' is empty. The 'Save' button is highlighted with a red box and labeled 'Required'.

Authentication Type* Sql Authentication

Login Name* TRAINER_UTILITY_User2

Full Name* John Trainer

Phone 503-503-5032

Address 123 ABC St

City Portland

BPI Number

User Role* Utility User

Field Role Auditor

Program Templates* Primary

Required Reset Password ☒ **Inactive** ☐ **Unlock User** ☒

Email* btgraves@bpa.gov

ZIP 97201

State OR

BPI Expiration Date

Save **Cancel**

Miscellaneous Tips

- The Hancock Cloud has a quick link to resources on the bottom left of the screen called Release Notes. Click it to activate, you will see the direct connection to the Commercial Lighting page on bpa.gov.

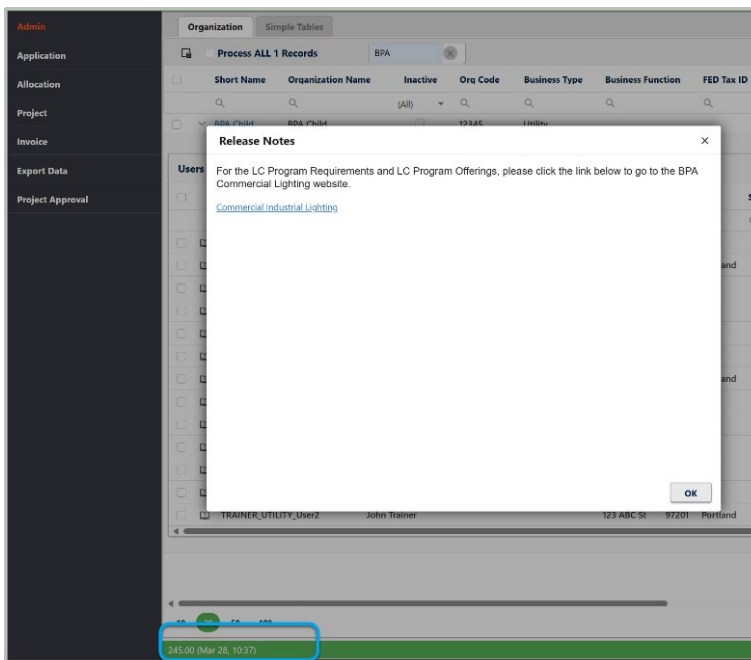


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DRAFT

Purpose

The document is a master training manual for the Bonneville Power Administration (BPA) Online Lighting Calculator (OLC). It has detailed instructions for utilities to submit a lighting calculator (LC) to BPA.

Scope

This document provides essential information and training for all user types in the OLC. User roles define the content that each individual can view and interact with. Here is an overview of each role, including a brief description and their corresponding access permissions.

- Hancock Software personnel: full access, with the ability to make code changes.
- BPA Administrators: set incentive rates, add BPA users, add utilities and trade allies, and create their administrators.
- BPA Users: add projects, edit, and regular use.
- Trade Ally Managers: trade ally administrative functions, add projects, add trade ally users, edit, and regular use.
- Trade Ally Users: utility administrative functions, add projects, edit, and regular use.
- Utility Administrators: add utility users, set utility incentives, and regular use.
- Utility User: edit and approve projects, and regular use.

Glossary of Terms

The new OLC has been built on an existing cloud-based platform. As a result, some of the names used in the past with LCs are different in the new OLC.

Previous Lighting Calculator	Online Lighting Calculator	
	Hancock Cloud	MINT
Incentive	Project cost	
Invoiced (e.g. sent to BEETS)	Status of Submitted to Utility or Submitted to BEETS	
Measures		Items
Project	Application	
Project Name	Customer Name	
Report		Proposals
Spaces (e.g. walk-in cooler)		Areas
Utility	Energy Consumption	

➤ Hancock Cloud vs. MINT

The Online Lighting Calculator consists of two parts: Hancock Cloud and MINT.

- Hancock Cloud is Hancock Software's home platform (website). This is where you start projects, manage them, and submit them to a utility or ultimately to BPA Energy Efficiency Tracking System (BEETS).
- MINT is an application that can be downloaded to a tablet or laptop for use in the field when Internet connections may or may not be available. MINT is the engine that runs energy saving calculations. The typical use case involves creating projects in Hancock Cloud, syncing them to MINT for data entry and calculations, and then syncing back to Hancock Cloud for finalization.

How To

- Log into Hancock Cloud <https://bpa.hancocksoftware.com/HEEC/#/login>.
- Create Administrator Account

BPA creates all utility administrator and trade ally manager (admin) accounts. The utility and trade ally provides the name and email address for the person who will serve as an administrator. The utility and trade ally administrators can create subsequent user accounts for their own organization. If your organization needs a new admin account, please email your request to lighting@bpa.gov.

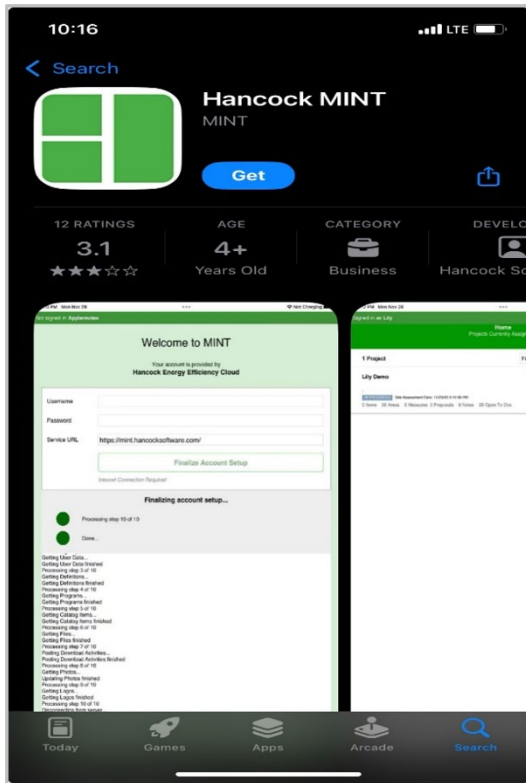
 - Utility or trade ally sends a request to lighting@bpa.gov setting up an administrator account.
 - Utility or trade ally administrator adds new users for your organization.
 - See administrative account functions for further instructions.
 - Enter your username and password sent by BPA into the login screen.
 - Hancock Cloud website: [Bonneville Power Administration - Production](#).

The screenshot shows the login interface for Hancock Cloud. At the top left is the 'HANCOCK SOFTWARE' logo. At the top right are links for 'Support' and 'Single Sign-On'. The main content area is a light gray rectangle containing a white login box. The box is titled 'Hancock Cloud - Bonneville Power Administration - Production'. Inside the box, there are two input fields: 'Login Name' and 'Password'. Below these fields is a green 'Sign In' button. At the bottom of the box are two links: 'Change password' and 'Forgot password?'. The footer of the page is a green bar with the text 'Copyright ©2025 Hancock Software Inc.'

- Installing MINT: Apple iPadOS and Macintosh computers



You can download MINT on your tablet, but it is not compatible with an iPhone.

 - Go to the app store and download Hancock MINT Mobile Intake Tool.
 - The Apple app store will have the most recent version of the MINT app available.
 - Ensure automatic updates are selected or are prepared to check for updates every time you use the app.
 - If your settings do not allow automatic updates, choose to allow them manually when available.






➤ Installing MINT: Microsoft Windows

- Go to the Hancock Software download page, link below, and select the appropriate version for your system <https://bpa.hancocksoftware.com/mint/>.
- Run the installation .exe, an install wizard will assist you with the process.

**Hancock Software
Bonneville Power Administration
MINT Production Support**

MINT Installation Page: updated 3-9-2025 5PM ET - build 1510 Production Build

 [Windows 11 64-bit standard install kit](#)
 [Windows 11 64-bit MSI for Managed Desktops](#)
 [Apple MacBook installation package](#)
[Hancock MINT \(Apple TestFlight\)](#)
[AppStore iPad/iPhone Public build 1472](#)

For organizations that do not allow individuals to install their own software, work with your organization's IT department to get the right version (usually the MSI one) installed.

Starting a Project

- Please follow the instructions below. The buttons to click are highlighted with a blue oval in the screenshot.
- Once logged into Hancock Cloud, you will see the Admin screen below or similar depending on User type.
 - Click the **Application** on the left-hand navigation menu to get started.

The screenshot shows the Hancock Software Application interface. The left-hand navigation menu is visible, with 'Application' highlighted. The main area displays a table of applications. The 'New Application' button is highlighted in the top right corner.

Client Number	Client Status	Customer Name	Customer Name 2	Total Monthly Income	Applied Date	Project Street Address	Project City	Project Zip Code
129573517	Information missing	Crabtree's Crabapples			3/20/2025	100 Main	Camas	98706
149293629	Information missing	Eric Mullendore Auto	John Hairston Automotive		3/19/2025	100 Main St	Camas	98607
655809160	Job Created	3/3 end to end copy			3/3/2025	1234	Portland	12345
1882784816	Job Created	3/3 end to end prod			3/3/2025	1234	Portland	12345
1488771233	Information missing	Child end to end test			3/3/2025	12345	Portland	98000
514254209	Job Created	3/3 Product test			3/3/2025	1234	Portland	12345
658170196	Job Created	2/27 Prod Test 3			2/27/2025	1	Portland	12345
110542414	Job Created	1234			2/27/2025	1234	Portland	12345
393573385	Job Created	2/27 Test 2			2/27/2025	12345	Portland	98000
521555896	Job Created	2/27 BPA Child			2/27/2025	1234	Portland	12345

- Click the **New Application** button on the far right top of the screen.

The screenshot shows the Hancock Software Application interface. The 'New Application' button is highlighted in the top right corner.

- Complete the application contact information. For clarity, consider Customer Name as either the Project Name or a customer site identifier (e.g. Grocer 1), which will be transferred to MINT. Customer Name 2 is any additional info related to the project, and Customer Contact Name is the actual name of a person at the site. (Note: the asterisk (*) identifies required fields).

The screenshot shows the 'New Application' form. The form is titled 'New Application' and has a 'New Application' button in the top right corner. The form is divided into sections: 'Application Info', 'Contact', and 'Energy Consumption'. The 'Contact' section contains fields for Customer Name*, Customer Name 2, Customer Contact Name, Email, Project Street Address*, Project City*, Project State*, Project Zip Code*, Phone*, Alternate Phone, Service Address Status, and a checkbox for 'Federal Building'. The 'Application' section contains a dropdown for 'Application' and a dropdown for 'Energy Consumption'.

- Application - Bonnie's Bagels - Application received

New Application More ▾ - □ ×

Bonnie's Bagels [03/26/2025] ×

Application Info Application Qualification

Cancel Save Verify Address Save Settings Unit Info

123 MAIN ST. * * * * * 314201 *

Application ▾

Energy Consumption Click 1

Click 2

Utility	Comment
No data	

Remove New

Comments ▾

Change History ▾

- Consumption

Utility*

BPA Child - Electricity - 0.060

Utility Rate

0.060

Demand (\$/kW)

5.000

Comment

Cancel

Save

- Application - Bonnie's Bagels - Application received**

[New Application](#) [More](#) [-](#) [□](#)

Bonnie's Bagels (03/26/2025) ✕

Application Info **Application Qualification** **History**

[Cancel](#) [Save](#) [Verify Address](#) [Save Settings](#) [Unit Info](#)

Contact

Customer Name* **Customer Name 2** **Customer Contact Name** **Email**

Bonnie's Bagels

Project Street Address* **Project City*** **Project State*** **Project Zip Code***

123 ABC St Select... OR 97201

Phone* **Alternate Phone** **Service Address Status**

(503) 503-5032 Unverified

☒ **Mailing Same As Project Address**

Mailing Street Address* **Mailing City*** **Mailing State*** **Mailing Zip Code***

123 ABC St Select... OR 97201

Application

- Click the **Qualify** button.

Application - Bonnie's Bagels - Application received

Buttons: New Application, More, -, □, ×

Tab: Application Qualification

Client Allocations

Requested Allocations

Allocation	Wap Rank
No data	

Messages

Allocation Name	Messages	Date/Time
-----------------	----------	-----------

- Select the correct **Allocation (Rate Period)** by checking the box next to the allocations available, then close the window. This connects the Allocation (Rate Period) to the project.

Application - Bonnie's Bagels - Eligible

Buttons: New Application, More, -, □, ×

Tab: Application Qualification

Client Allocations

Requested Allocations

Allocation	Wap Rank
<input checked="" type="checkbox"/> RP_FY24_FY25	1

Messages

Allocation Name	Messages	Date/Time
RP_FY24_FY25	Client is Eligible	3/28/2025 2:07:28 PM

➤ Create Project

- Check the box next to the application you want to make into a project, then click **Create Project**.
- Click **OK** on **Information** popup.

HANCOCK SOFTWARE APPLICATION

Buttons: TRAINING UTILITY ADMIN, MINT, Support, Sign Out

More ▾ Process All 13 Records

Buttons: Create Project, All ▾, Filters, Clear Search, Save Profile, New Application

	Client Number	Client Status	Customer Name	Customer Name 2	Total Monthly Income	Applied Date	Project Street Address	Project City	Project Zip Code	Phone	Alternate Phone	Email
<input checked="" type="checkbox"/>	360346222	Eligible	Bonnie's Bagels			3/26/2025	123 ABC St	Portland	97201	(503) 503-5032		
<input type="checkbox"/>	1022566550	Job Created	EZE Demo 3/27/25			3/27/2025	27 Main Street	Aberdeen	98888	(333) 222-1111		
<input type="checkbox"/>	2136249680	Job Created	3/27 MRM Child Prod Test			3/27/2025	123 NE 9th	Portland	97000	(503) 123-1234		mrmclatchie@bpa.gov
<input type="checkbox"/>	129573517	Information missing	Crabtree's Crabapples			3/20/2025	100 Main	Camas	98706	(503) 230-4000		

- After creating the project move to the **Project** tab on the left-hand navigation menu, double click the **Project Number** to open the project detail screen.

HANCOCK SOFTWARE PROJECT

Buttons: TRAINING UTILITY ADMIN, MINT, Support, Sign Out

More ▾ Process All 11 Records

Buttons: Invoice, Validate, Delete, Save Profile, All ▾, Filters, Clear Search, Export

	Client Name	Project Number	Job Type	Allocation(s)	Agency	Address	County	Assessment Date	Contract
<input checked="" type="checkbox"/>	Bonnie's Bagels	0000000032		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201		3/28/2025	
<input type="checkbox"/>	alewis child app 3.28.2025	0000000031		RP_FY24_FY25	BPA Child	2323, Aberdeen, AK 55555		3/28/2025	
<input type="checkbox"/>	EZE Demo 3/27/25	0000000026		RP_FY24_FY25	BPA Child	27 Main Street, Aberdeen, WA 98888		3/27/2025	
<input type="checkbox"/>	3/27 MRM Child Prod Test	3/27 Child Prod Test		RP_FY24_FY25	BPA Child	123 NE 9th, Portland, OR 97000		3/27/2025	
<input type="checkbox"/>	3/3 end to end copy	0000000014		RP_FY24_FY25	BPA Child	1234, Portland, OR 12345		3/3/2025	

- In the Project Detail screen
 - Select the **Funding Source** (usually EEI).
 - Select the **Sector** (e.g. commercial or industrial).
 - Click the **Schedule**, then **New** to add a scheduled activity.
 - In the **Task** dropdown select **Assessment**.
 - Add the person who will do the assessment from your organization.
 - This is required to get the project sync to MINT.
 - Input **Scheduled Date**.
 - Click **Save** (Note: must complete all fields in order to sync to MINT).

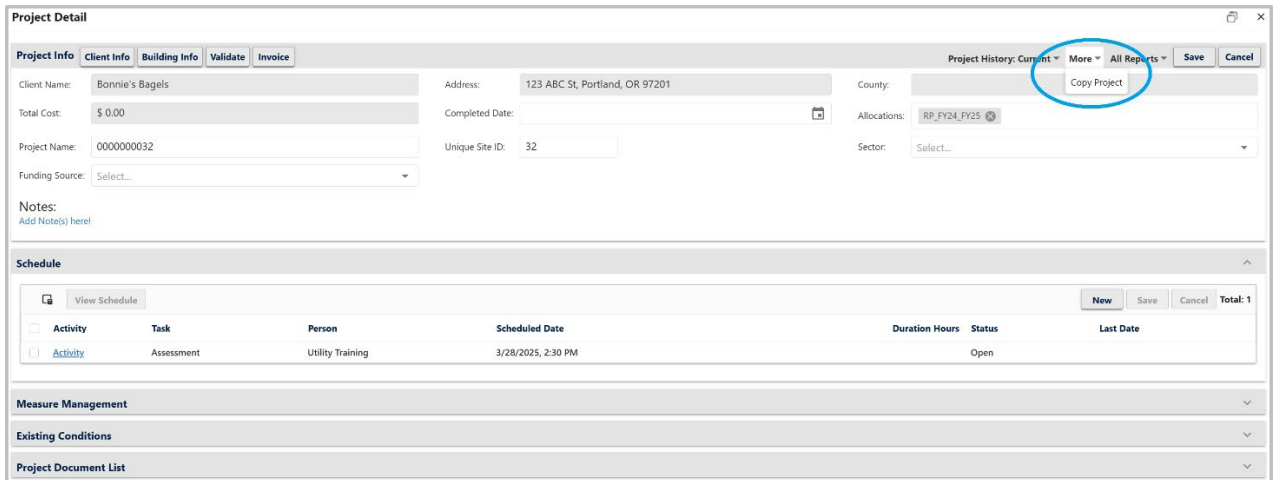
This completes all the required inputs for the project initiation in the Hancock Cloud and will allow the project to sync to the MINT application.

➤ Copy and Fix a Project

- When projects are not approved by BPA in BEETS or a utility wants to fix an error, the project needs to be reworked in the Hancock Cloud and/or MINT.
- Creating a copy can also be useful for generating multiple proposals.
- The first step in copying a project is to create a new application, you must create a destination for the project you want to copy.
- Start with **New Application**.
- Once the new application is made, double click the **Project Number**.
- We created Bonnie's Bagels Proposal 2 for this purpose.

Client Name	Project Number	Job Type	Allocation(s)	Agency	Address	County	Assessment Date	Contract
Bonnie's Bagels	0000000032		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201		3/28/2025	
alewis child app 3.28.2025	0000000031		RP_FY24_FY25	BPA Child	2323, Aberdeen, AK 55555		3/28/2025	
E2E Demo 3/27/25	0000000026		RP_FY24_FY25	BPA Child	27 Main Street, Aberdeen, WA 98888		3/27/2025	
3/27 MRM Child Prod Test	3/27 Child Prod Test		RP_FY24_FY25	BPA Child	123 NE 9th, Portland, OR 97000		3/27/2025	
3/3 end to end copy	0000000014		RP_FY24_FY25	BPA Child	1234, Portland, OR 12345		3/3/2025	
3/3 end to end prod	0000000013		RP_FY24_FY25	BPA Child	1234, Portland, OR 12345		3/3/2025	
3/3 Product test	3/3 Prod Test		RP_FY24_FY25	BPA Child	1234, Portland, OR 12345		3/3/2025	

- Click the **More** drop-down menu, then click **Copy Project**.



Project Detail

Project Info Client Info Building Info Validate Invoice

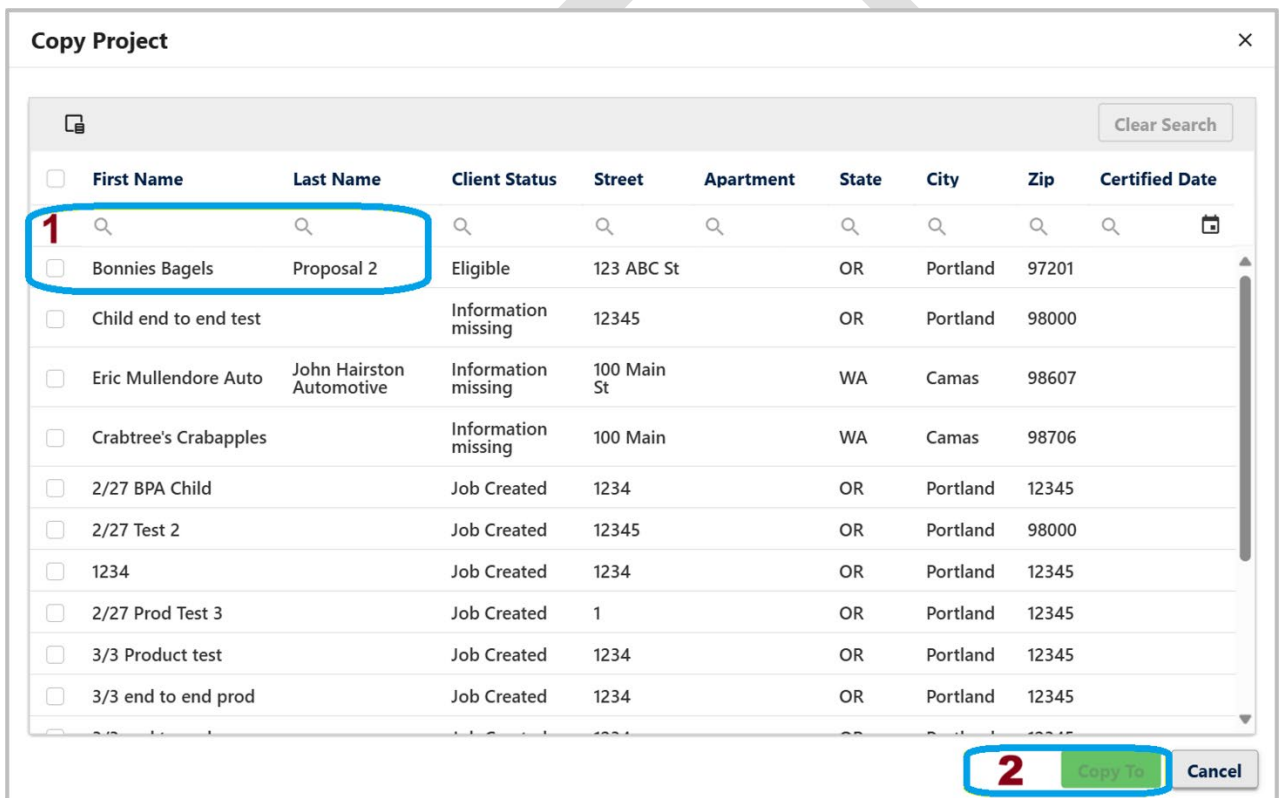
Project History: Current More All Reports Save Cancel

Client Name: Bonnie's Bagels Address: 123 ABC St, Portland, OR 97201 County:
 Total Cost: \$ 0.00 Completed Date:
 Project Name: 0000000032 Unique Site ID: 32 Allocations: RP_FY24_FY25
 Funding Source: Select... Sector: Select...
 Notes:
 Add Note(s) here!
 Schedule
 View Schedule
 New Save Cancel Total: 1

Activity	Task	Person	Scheduled Date	Duration Hours	Status	Last Date
Activity	Assessment	Utility Training	3/28/2025, 2:30 PM		Open	

 Measure Management
 Existing Conditions
 Project Document List

- From the Copy Project screen, search for the application to copy the project into (recommend to sort by name); then click the **checkbox** and then click **Copy To**.



Copy Project

Clear Search

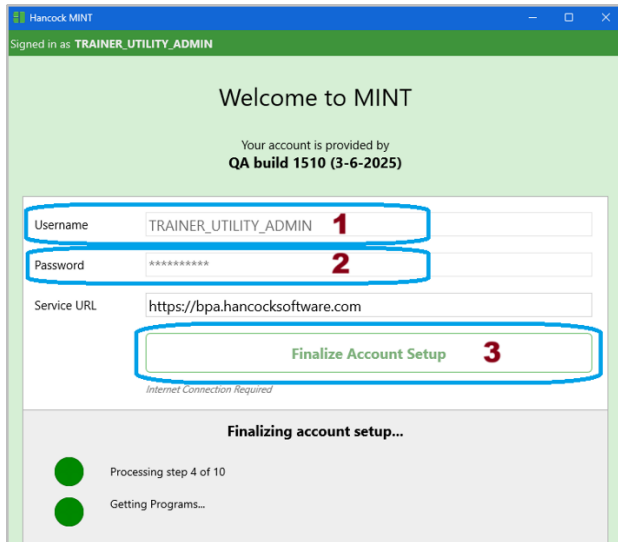
<input type="checkbox"/>	First Name	Last Name	Client Status	Street	Apartment	State	City	Zip	Certified Date
<input type="checkbox"/>	Bonnie's Bagels	Proposal 2	Eligible	123 ABC St		OR	Portland	97201	
<input type="checkbox"/>	Child end to end test		Information missing	12345		OR	Portland	98000	
<input type="checkbox"/>	Eric Mullendore Auto	John Hairston Automotive	Information missing	100 Main St		WA	Camas	98607	
<input type="checkbox"/>	Crabtree's Crabapples		Information missing	100 Main		WA	Camas	98706	
<input type="checkbox"/>	2/27 BPA Child		Job Created	1234		OR	Portland	12345	
<input type="checkbox"/>	2/27 Test 2		Job Created	12345		OR	Portland	98000	
<input type="checkbox"/>	1234		Job Created	1234		OR	Portland	12345	
<input type="checkbox"/>	2/27 Prod Test 3		Job Created	1		OR	Portland	12345	
<input type="checkbox"/>	3/3 Product test		Job Created	1234		OR	Portland	12345	
<input type="checkbox"/>	3/3 end to end prod		Job Created	1234		OR	Portland	12345	

Copy To Cancel

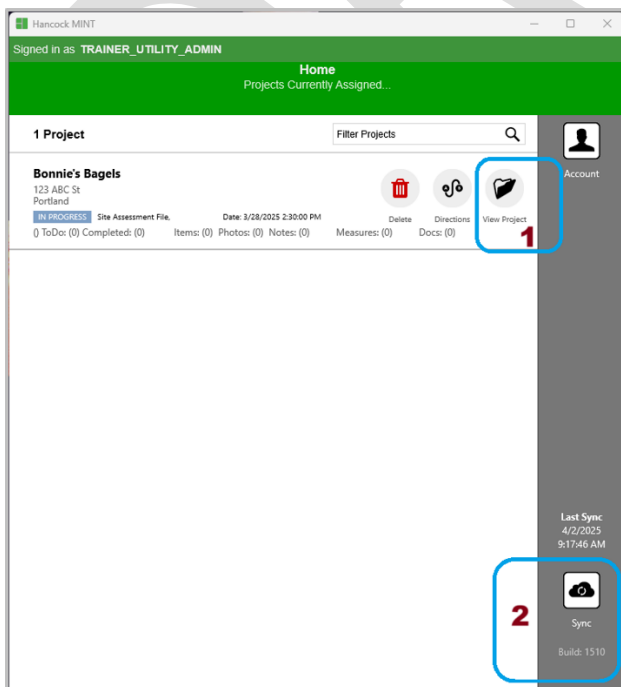
- Click **OK**.

MINT

- Open MINT on your tablet or laptop, sign in with username and password, and press Finalize Account Setup the first time you use those credentials. You will also need to finalize setup if you sign in with a different combination of username and password (e.g., an admin account vs. user account).
 - Note: this could be the same person who started the application in the Hancock Cloud or a different person assigned the assessment. Only people who are scheduled to do an assessment will can see the project after it's "synced."



- The MINT app will show that it's connecting, then show all the projects assigned to you.
 - Ensure you are connected to the internet.
 - To get the project from the Hancock Cloud to MINT, click the **Sync** button on the MINT main page.
- After sync, locate the project and click **View Project**.



- Click the **Building Info** to begin entering the project information.

The screenshot shows the 'Project Overview' page in Hancock MINT. The user is signed in as 'TRAINER_UTILITY_ADMIN'. The project is 'Bonnie's Bagels' at '123 ABC St, Portland, 97201' with project ID '0000000032'. The project status is 'Site Assessment IN PROGRESS'. A blue box highlights the 'Building Info' icon in the top navigation bar. Other icons include 'Client Info' and 'Assessment Date'. The right sidebar has buttons for 'Mark Project as Done', 'Drawings', 'Photo Notes', and 'Text Notes'. The main content area shows 'Items (0/0)', 'This Project has no proposals', 'Notes Summary (0)', 'Operating Schedules (1)' with a default of 12 hours per day, and 'Documents (0)'. A 'To Do List' section includes 'Project Results' and 'Watt Savings %' (Less than 25%, Does not Qualify for Savings).

- Enter general information and answer the 4 Baseline Eligibility questions that will determine if the job is considered a retrofit or new construction.

The screenshot shows the 'Building Info' page in Hancock MINT. The user is signed in as 'TRAINER_UTILITY_ADMIN'. The project is 'Bonnie's Bagels'. The page has a 'Notes' section with a text area and buttons for 'Saved Notes...' and 'New Note'. Below this are input fields for 'E. Utility Cap (\$)', 'Willingness to Pay (Lesser of A,C,D,E)', and 'Watt Reduction (%)' (currently 0). The 'Baseline Eligibility' section contains four questions with dropdown menus: 'Is the facility or exterior lighting system newly constructed?' (No), 'Is the facility newly constructed addition to an existing facility?' (No), 'Is there a change in the occupancy type as part of the lighting project?' (No), and 'Is the project a major renovation for reasons other than lighting?' (No). At the bottom, a dropdown menu shows 'Based on your responses the project is defined as: Retrofit'.

- Enter Project Information
- Building type (from the drop-down list),
 - Estimated project cost,
 - Space Conditioning (Heating, Ventilation, Air Conditioning (HVAC) information).

Hancock MINT

Building Info

Bonnie's Bagels

Notes

Saved Notes... New Note

Watt Reduction (%) 0

Baseline Eligibility

Is the facility or exterior lighting system newly constructed? No

Is the facility newly constructed addition to an existing facility? No

Is there a change in the occupancy type as part of the lighting project? No

Is the project a major renovation for reasons other than lighting? No

Based on your responses the project is defined as: Retrofit

Project Information

Building Type Restaurant

Estimated/Actual Project Cost 1000

Operating Schedule

- Enter Operating Schedule (baseline for the entire site)
 - Note: if you check the “Full Year” box, the total will be 8760 hours and the days will disappear.

Hancock MINT

Building Info
Bonnie's Bagels

Notes

Saved Notes... New Note

Operating Schedule

Full Year ☐

Sunday 8

Monday 8

Tuesday 8

Wednesday 8

Thursday 8

Friday 8

Saturday 8

Weeks per Year 52

Annual Hours

Space Conditioning

- Click the **Return Arrow**, which will save your progress.

Hancock MINT

Building Info
Bonnie's Bagels

Notes

Saved Notes... New Note

Utility Bills

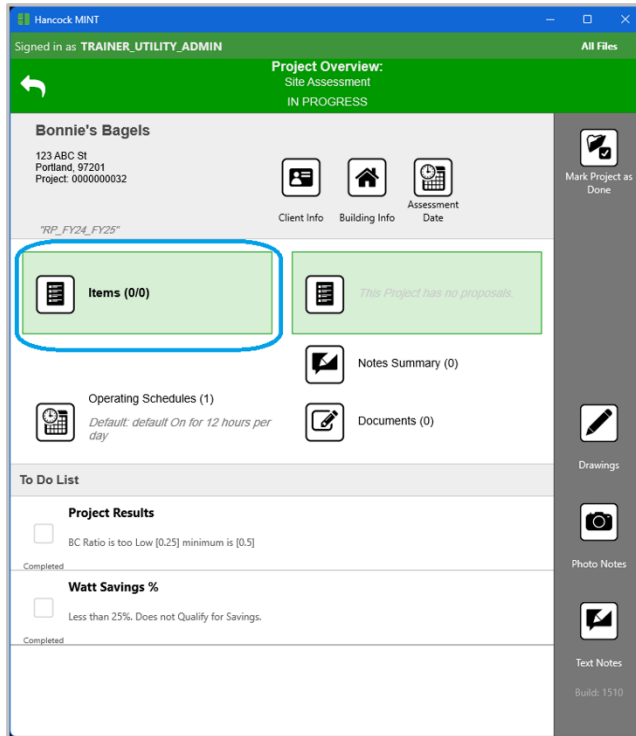
Electricity Vendor: BPA Child

Account Number:
UNIT COST NOT SET!

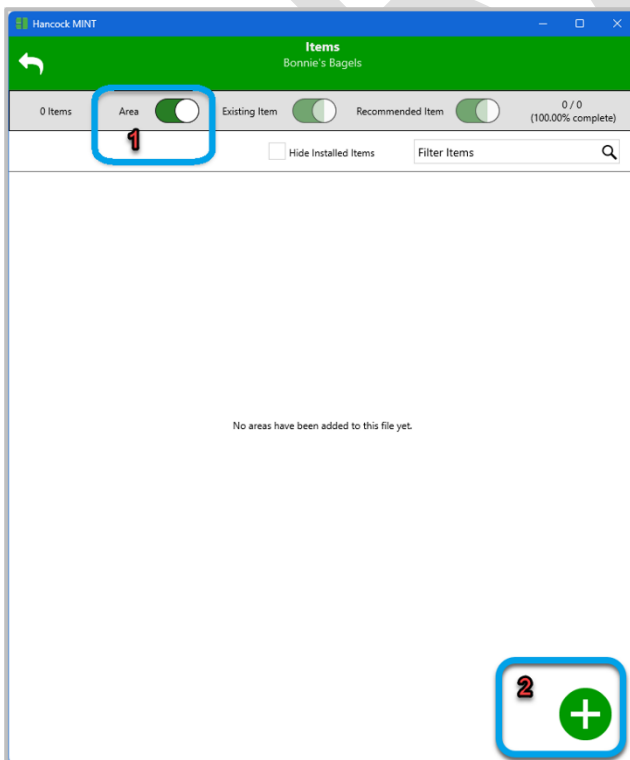
Remove Edit...

Adding Measures

- Now that the overarching building characteristics are identified, move to add specific items (measures) to each area.
 - Click the **Items**, add **Measures** which are called Items in MINT.



- You will see the Area slider is not green or ready to go.
 - Move the **Area** slider and it will turn green.
 - Click the **Plus** sign circle.



- Now you can begin entering Area, existing (assuming retrofit) and replace equipment
 - Enter the Area Name where it says Area. For this example, we will use “office”.
 - After entering “office”, click the **Plus** sign across from **Lighting Existing**. This will allow the user to begin entering the existing equipment to be retrofitted.

Hancock MINT

Area and Item
Bonnie's Bagels

Office 1

Search Existing Items and Measures

Lighting Existing
Existing Catalog Item - (Lighting)
Generic item, must be changed 2 +

New Construction
Recommended Catalog Item - (New Construction)
Generic item, must be changed +

- The new screen shows the Name of the Item and Measure (change if needed to track area/installations). For example, the assessor might have other items in the office and to clarify which one they could add “exit sign,” “overhead,” or “wallpacks,” as needed to clarify.
 - Enter the general information including Name, Type (of lamp), and Quantity.

Hancock MINT

Area and Item
Bonnie's Bagels

Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

General

Name Lighting Existing in Office 1

MINT Message
Class is empty!

Type Deemed 2

Quantity 1 3

Measure Details

Recommend Done

- After updating the Quantity in the previous step, start entering the Measure Details (for the example below, we'll do a fluorescent to LED retrofit).
 - Note: the ballast factor is brought up automatically after the top sections are completed.

Item info for Lighting Existing in Office
 This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

General

Measure Details

Class T10

Category 6 ft

Subcategory VHO Lamp/ Mag Ballast

Lamp Wattage (Deemed) 0160

Lamps per Fixture (Deemed) 0002

Ballast Factor 1.1

Recommend Done

- Enter the Controls detail (if applicable)
 - For this example, we'll use an occupancy sensor that saves 10 percent. If the Area has different HVAC or Hours, check the appropriate box and enter the appropriate information.

Item info for Lighting Existing in Office
 This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

General

Controls

Control ☒

Control Class

Quantity of controls

Percent Reduction in Hours

HVAC

Different HVAC? ☐

Different Hours? ☐

Recommend Done

Item info for Lighting Existing in Office
 This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

General

Control Class Occ. Sensor

Quantity of controls 1

Percent Reduction in Hours 10

HVAC

Different HVAC? ☐

Different Hours? ☐

- After all the existing equipment is entered, click the Recommend to open up the Replacement/Retrofit info window.

HVAC

Different HVAC? ☒

Heating Type **No heating**

Cooling Type **No cooling**

Different Hours? ☒

Sunday **24**

Monday **24**

Recommend Done

- Best practice for tracking existing and replacement items: It is highly recommended that the Name be updated. In this case, an update to add “in office” (so Lighting Replacement in Office) would be appropriate. This helps other people who look at the project connect existing and replacement equipment.
- If this is a decommissioning project, check the **Decommission** box and enter the appropriate information including FEWER lamps than before to complete the Measure Details section.

Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

General

Name **Lighting Replacement in office 1**

MINT Message Class is empty!

Type **Deemed**

Quantity **1 2**

Decommission ☐ **3**

Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

General

Measure Details

Class **LED**

Category

Subcategory

Lamp Wattage (Deemed)

Lamps per Fixture (Deemed)

Ballast Factor

Recommend Done

- Note: if the project is adding controls, check that box for the existing equipment regardless of whether they’re present or not at that time. This will automatically show the controls information in the recommended section.

- For example, the same controls type and percent reduction have been entered. When the existing and retrofit equipment has been entered, MINT will show the Measure Level Results.
- When complete, click **Done** button, at lower right corner.

Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

General

Measure Level Results **1**

HVAC Interaction Factor: 1

Baseline kWh: 6167.04

Watt Reduction: 6009.36

Reduction in Watts (%): 97.443

Total Incentives (\$): 873

Adjusted Annual Savings (kWh): 6659

Recommend **2** Done

- Add measures as needed for all retrofits and better than code installations for New Construction.
 - As noted before, to move to the previous screen use the white arrow in the upper right-hand corner of the page. If the lighting replacement (in office for our example) is wrong and needs to be redone, click the **3 dots** and then **Remove** to redo the entry.

Hancock MINT

Area and Item

Room's Budgets

Office

Lighting Replacement in office **1**

Replaces "Lighting Existing in Office"

Installed

Search Existing Items and Measures

Lighting Existing in Office

Existing Project Item - (Lighting)
Generic Item, must be changed

Lighting Replacement in office

Recommended Project Item - (Lighting)
Generic Item, must be changed

Lighting Existing

Existing Catalog Item - (Lighting)
Generic Item, must be changed

Lighting Existing in Office

Change Operating Schedule

Item Info

Remove **2**

Photos...

Lighting Replacement in office

Remove **3**

- To see the results, click the **Proposals** button.

Hancock MINT

Signed in as **TRAINER UTILITY_ADMIN** All Files

Project Overview:
Site Assessment
IN PROGRESS

Bonnie's Bagels
123 ABC St
Portland, 97201
Project: 0000000032

"RP_FY24_FY25"

Client Info Building Info Assessment Date

Items (1/1) **Proposals (1)** Notes Summary (1) Operating Schedules (1) Documents (0)

Default: default On for 12 hours per day

Mark Project as Done

- Reports: there are 3 reports available.

The first two reports are identical to the reports from the prior lighting calculator, and each is shown in a screenshot below. The third report is a way to check the kilowatt hour (kWh) and incentive if needed.

- Important: These reports can be accessed in the Hancock Cloud, open each report and click the **"Save and Submit"** button in the lower left corner of the page.

Hancock MINT

Proposals
Bonnie's Bagels

Cost Saving Analysis **1**

Select a Report from the list Summary Report **2**

Project Name: Bonnie's Bagels

Project Summary

CUSTOMER/MAILING INFORMATION		PROJECT/SITE INFORMATION	
Project Name	Bonnie's Bagels	Project/Site Address	123 ABC St
Company Name	Bonnie's Bagels	City/State/Zip Code	Portland, OR 97201
Mailing Address	123 ABC St		
Contact Phone Number	(503) 555-5552		
Contact Email			

CUSTOMER/MAILING INFORMATION		UTILITY RATE SCHEDULE	
Organization	Utility	Trade Ally	Energy Rate (\$/kWh): \$0.06
Contact Name			Demand Rate (\$/kW): \$5
Contact Phone Number			
Contact Email			

ESTIMATED PROJECT SUMMARY			
Estimated Annual Energy Savings	6000	This project is pending utility approval. All figures should be considered estimates.	
Estimated Energy Savings (Percentage)	97%		
Estimated Annual Utility Bill Savings	\$450		
Estimated Install Costs	\$1000		
Estimated Incentive	\$700		

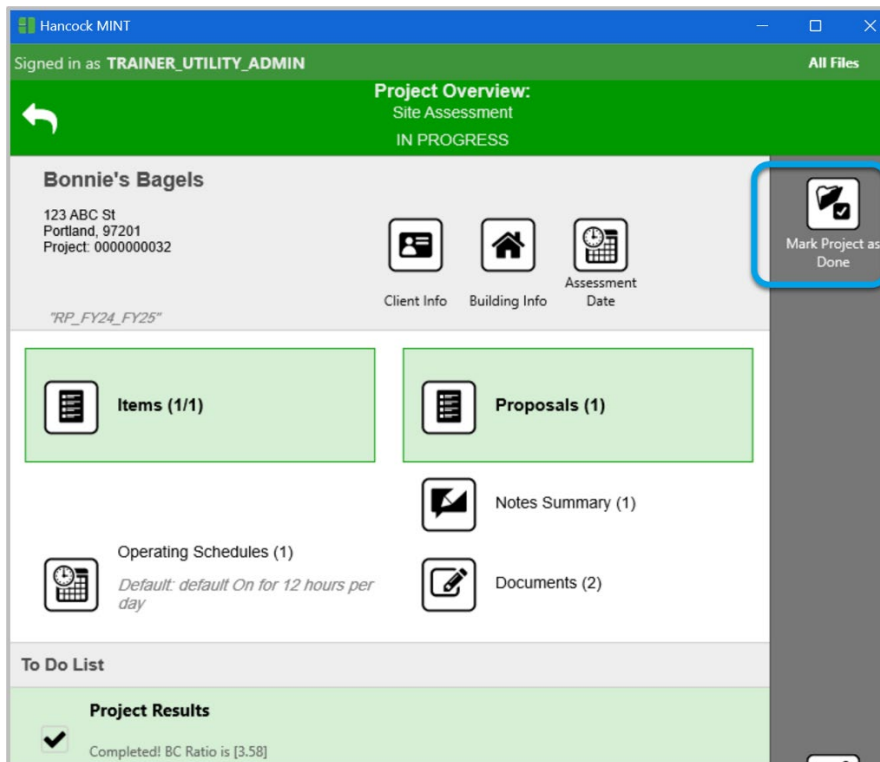
Itemized Measure #	Existing	Proposed	Controls	Savings	Efficiency	Notes per Future Incentives
8780 Office	2-T10 6 RWHQ Lamp/ Mag Ballast 160W/lamp 2 lamps/cu/fixture	1-LED Gen. Indoor / Outdoor Standard 20W/lamp 1 lamp/cu/fixture	1 x Occ. Sensor(s) 10 % Reduction	Baseline Proposed Savings (% decrease) 6000/97%	6167 175	Decommissioning: 1 Lighting Replacement in office: \$650 kWh at \$0.13/kWh (\$86.3) Controls: Occ. Sensor@ \$10 each (10)

Updated 03/19/2025 12:00 (EST)

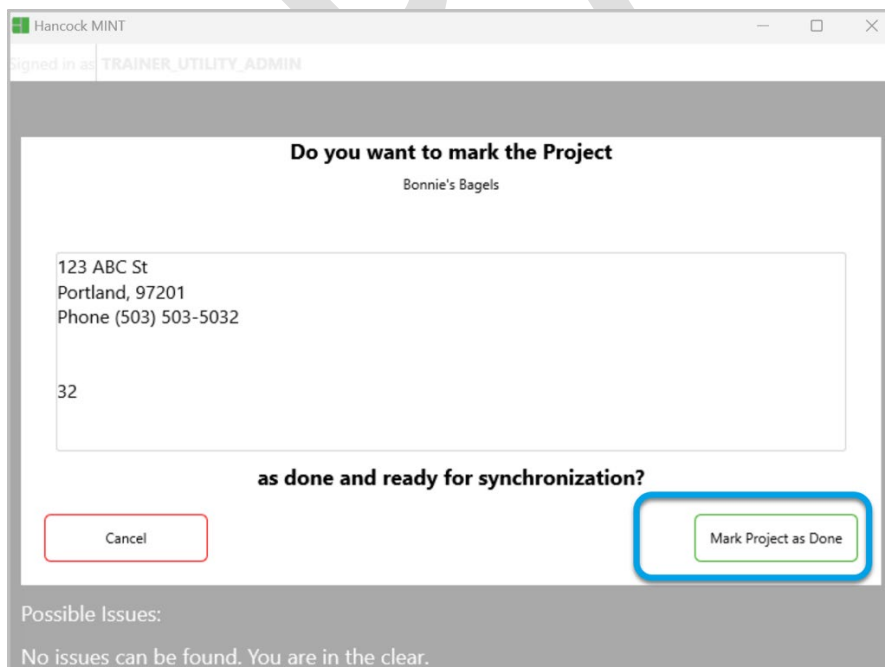
Save and Submit **3**

- When done, use the return arrow and get back to the main page, click the Sync button, then the information will be sent to the Hancock Cloud.

- When done in MINT. When the project is 100 percent completed in MINT, click the **Mark Project as Done** button.
 - Note: this will remove the project from the front page of MINT.
 - You'll have one more chance to back out if needed.



- After clicking the **Mark Project as Done**, return to the main page, and sync MINT back to the Hancock Cloud. Please ensure you are connected to a network when you sync.



- Ensure you sync the project again after you Mark Project as Done.

Finishing Project in the Hancock Cloud

- Now that the project has synced from MINT back to the Hancock Cloud, it is time to send it to the utility. Click the **Project** button and find the project to be moved along (invoiced). Our example is project 0000000140. Double click the **Project Number** to open it.

Client Name	Project Number	Job Type	Allocation(s)	Agency	Address	County
EZE Part 1 of 6 Video	0000000053		RP_FY24_FY25	BPA Child	10 Main St., Aberdeen, WA 98888	
4/4 SFTP Prod Test	4/4 SFTP Prod Test		RP_FY24_FY25	BPA Child	1234, Portland, OR 97000	
Practice project for video scripts Part 1	0000000043		RP_FY24_FY25	BPA Child	111 Maple Rd., Aberdeen, WA 98887	
Denny's Copy	0000000036		RP_FY24_FY25	BPA Child	1234, Portland, OR 12345	
3/31 MRM Test	0000000035		RP_FY24_FY25	BPA Child	905 NE 9th, Portland, OR 97000	
Bonnie's Bagels Proposal 2	0000000034		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201	
alewis child app 3.28.2025 (PROPOSAL 2)	0000000033		RP_FY24_FY25	BPA Child	5232332, Aberdeen, AK 55555	
Bonnie's Bagels	0000000032		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201	
alewis child app 3.28.2025	0000000031		RP_FY24_FY25	BPA Child	2323, Aberdeen, AK 55555	
EZE Demo 3/27/25	0000000026		RP_FY24_FY25	BPA Child	27 Main Street, Aberdeen, WA 98888	

- Open the **Measure Management** and click the **Assign Allocation** line from the dropdown menu to connect to the correct rate period.

Project Detail

Project Info | Client Info | Building Info | Validate | Invoice

Client Name: Bonnie's Bagels | Address: 123 ABC St, Portland, OR 97201 | County: | Total Cost: \$ 873.00 | Completed Date: | Allocations: RP_FY24_FY25 | Project Name: 0000000032 | Unique Site ID: 32 | Sector: Select... | Funding Source: Select... | Notes: Add Note(s) here!

Schedule

View Schedule | New | Save | Cancel | Total: 1

Activity	Task	Person	Scheduled Date	Duration Hours	Status	Last Date
Activity	Assessment	Utility Training	3/28/2025, 2:30 PM		Open	4/8/2025 10:42:23 AM

Measure Management

Measure Management | Existing Item | Class Identify | Measure Name | Measure Unit | Item Count | Total Cost | Contractor | Order

Assign Allocation | Lighting Existing in Office | Lighting | Lighting Replacement in office | EA | 1 | \$873.00

- Choose the correct allocation (rate period), check the **box**, then click the **Apply** button.
 - Note: if not entered via MINT, enter the total costs to proceed.

Measure Management

Assign Allocation | RP_FY24_FY25 | Apply | Clear Search | Save | Cancel |

Class Identify	Area Name	Measure Name	Invoice Status	Total Cost	Remaining Amount	RP_FY24_FY25
Lighting	Office	Lighting Replacement in office		\$873.00	\$873.00	
Total				\$873.00	\$873.00	

Existing Conditions

Project Document List

- Click **X** on the upper right to return to the **Project** section.
- Click the **small box** next to the project, then click the **Invoice** button.

The screenshot shows a sidebar with navigation options: Admin, Application, Allocation, Project, Invoice, Export Data, and Project Approval. The 'Project' section is active. The main table lists projects with columns: Client Name, Project Number, Job Type, Allocation(s), Agency, and Address. The 'Invoice' button in the top right is circled with a red '2'. The row for 'Bonnie's Bagels' is highlighted, with a small box next to it circled with a red '1'.

Client Name	Project Number	Job Type	Allocation(s)	Agency	Address
E2E Part 1 of 6 Video	0000000053		RP_FY24_FY25	BPA Child	10 Main St., Aberdeen 98888
4/4 SFTP Prod Test	4/4 SFTP Prod Test		RP_FY24_FY25	BPA Child	1234, Portland, OR 97201
Practice project for video scripts Part 1	0000000043		RP_FY24_FY25	BPA Child	111 Maple Rd., Aberdeen WA 98887
Denny's Copy	0000000036		RP_FY24_FY25	BPA Child	1234, Portland, OR 12345
3/31 MRM Test	0000000035		RP_FY24_FY25	BPA Child	905 NE 9th, Portland 97000
Bonnie's Bagels Proposal 2	0000000034		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201
alewis child app 3.28.2025 (PROPOSAL 2)	0000000033		RP_FY24_FY25	BPA Child	5232332, Aberdeen, WA 98555
Bonnie's Bagels	0000000032		RP_FY24_FY25	BPA Child	123 ABC St, Portland, OR 97201
alewis child app	0000000031		RP_FY24_FY25	BPA Child	2323, Aberdeen, AK 99501

- Confirm the correct allocation has been entered, then pick an invoice number or New Invoice checkbox (used for our example), then click the **Save** button.

The 'Create Invoice' dialog box shows the following fields and actions:

- Allocation:** A dropdown menu with 'RP_FY24_FY25' selected, circled with a red '1'.
- New Invoice:** A checkbox that is checked, circled with a red '2'.
- Reporting Month:** A text field with '2025-03' and a calendar icon.
- Invoice Number:** A dropdown menu with 'Select Invoice'.
- Save:** A green button at the bottom right, circled with a red '3'.

- Go to the Invoice page, find the project, double click the **invoice number** to get the Direct Costs View screen.
 - Click the **Checkbox** and then press the **Submit Invoice** button.

The screenshot shows the 'Invoice' section in the sidebar, circled with a red '1'. The main table lists invoices with columns: Alloc..., Invoic..., Repor..., Status, Direct..., Indire..., Total..., Invoic..., Paym..., Paym..., Agency, and Attached Invoice. The row for 'RP_FY...' is highlighted. Below the table, the 'Direct Costs View' is shown, with a 'Submit Invoice' button circled with a red '3'. The row for 'Bonnie's Bagels' is highlighted, with a checkbox next to it circled with a red '2'.

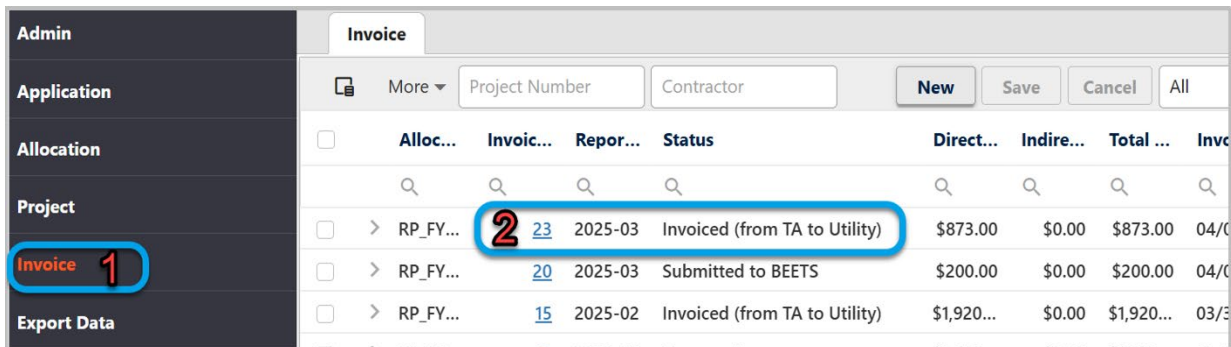
Alloc...	Invoic...	Repor...	Status	Direct...	Indire...	Total...	Invoic...	Paym...	Paym...	Agency	Attached Invoice
RP_FY...	23	2025-03	Open	\$873.00	\$0.00	\$873.00				BPA C...	...

Project Number	Client Name	Contractor	Submit Status	Message	Address	Total Cost
0000000032	Bonnie's Bagels		Open		123 ABC St, Portland, OR 97201	\$873.00

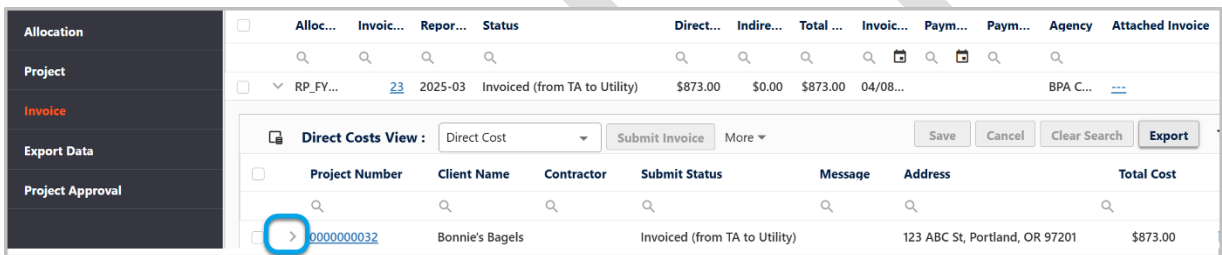
- The Status will be Invoiced (From TA to Utility).

Utility Work

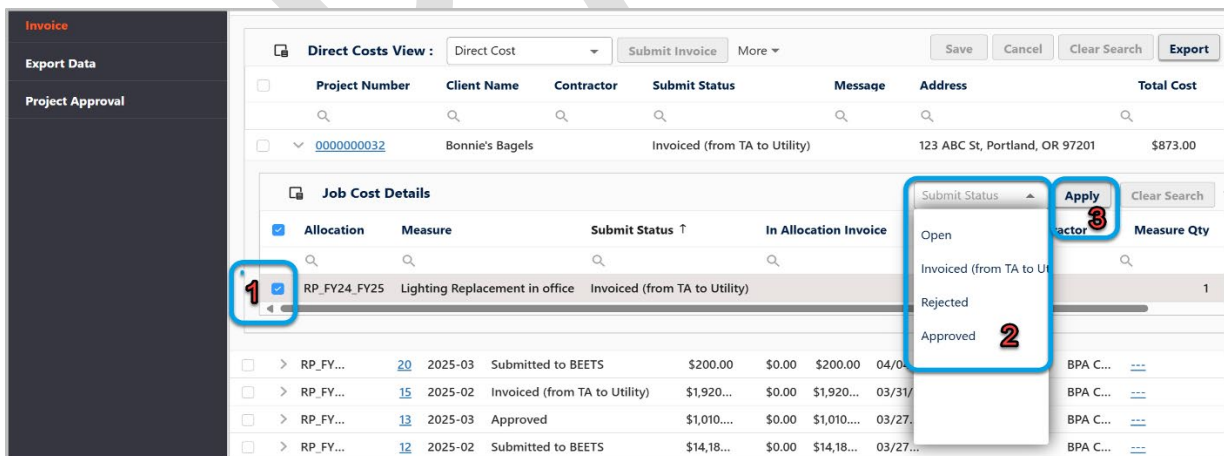
- After the trade ally submits the package/project to the utility, it is the utility's turn to review and process it.
 - From the Invoice on the left-hand navigation menu, the options vary depending on the user and their type (e.g. Invoice screens will be different for trade allies vs. utilities).
 - Click the **Invoice** on the left-hand navigation menu, then click the **Invoice Number**.



- With the Direct Costs View screen open, check the **checkbox** next to the job number and click the **arrow (caret)** to get to Job Cost Details.



- Select the **Job** with the checkbox in the **Job Cost Details** section, go to the **Submit Status** (drop down menu) box and select **Approved**, then click the **Apply** button.



- Return to the Invoice on the left-hand navigation menu, then double-click the **Invoice Number**.
 - Click the **checkbox** next to the Project Number and click the **Upload Projects** button. This will change the status and confirm it was uploaded.

- You will note the submit status has been changed to Submitted to BEETS.

Congratulations! Your Project has been submitted to BEETS!

Utility Incentive Cost Adjustments

- The process to update a Utility Incentive Cost is currently a BPA Administrative function in the Hancock Cloud.
- To request a Utility Incentive Cost adjustment, please submit a request to lighting@bpa.gov.

New Construction in MINT

- Enter the project in the Hancock Cloud as described above and sync with MINT.
 - Click the **View Project** button in MINT.
 - Note: using the customer's name or project name to ID the project as new construction is very helpful in identifying the project in MINT.

- Click the **Building Info** button and start the entries to make it a New Construction Project.

Hancock MINT

Signed in as **TRAINER UTILITY_ADMIN** All Files

Project Overview:
Site Assessment
IN PROGRESS

Bonnie's Bagels Proposal 2
123 ABC St
Portland, 97201
Project: 0000000034
"RP_FY24_FY25"

Client Info **Building Info** Assessment Date

Items (0/0)

This Project has no proposals.

Notes Summary (0)

Operating Schedules (1)
Default: default On for 12 hours per day

Documents (0)

Mark Project as Done

- Selecting “yes” to any of the Baseline Eligibility questions will make the project New Construction, Scroll down to the Baseline Eligibility section.

Building Info
Bonnie's Bagels Proposal 2

Notes

Saved Notes... New Note

A. Itemized Incentive

C. % of Project Cost

D. \$ per kWh

E. Utility Cap (\$)

Willingness to Pay (Lesser of A,C,D,E)

Watt Reduction (%) 0

Baseline Eligibility

Is the facility or exterior lighting system newly constructed?

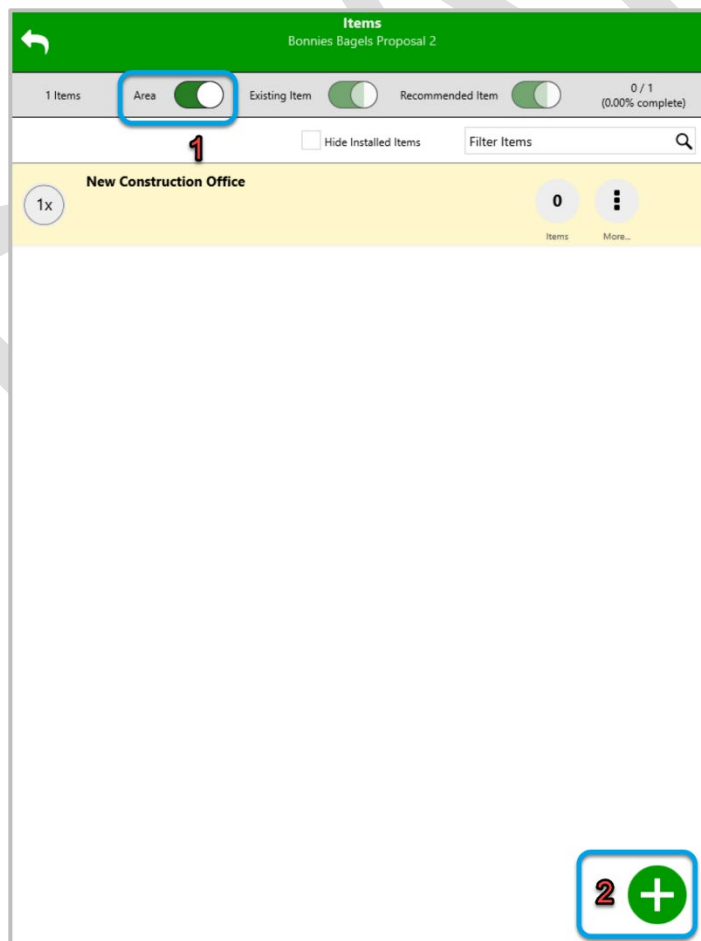
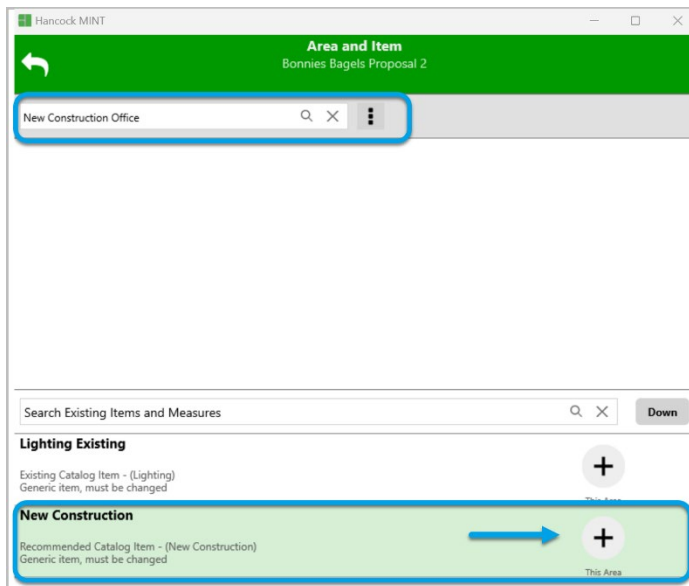
Is the facility newly constructed addition to an existing facility?

Is there a change in the occupancy type as part of the lighting project?

Is the project a major renovation for reasons other than lighting?

Based on your responses the project is defined as:

- When all required info is entered (Note: red box and red asterisks indicate required items), MINT will do its calculations.
- Next hit the **back arrow**.
 - You will need to click the **Items**.
 - Click the **Area** slider.
 - Click the green **Plus** circle.
 - In the **Area** box, type in the name of what you want the Area to be.



Administrative Account Functions

- Adding users by administrators. Only users with administrative functions can add others to their organization. To add a user to your organization, log in with the administrative username and password. Then, click **Admin** on the left-hand navigation menu, locate the appropriate organization Name and click the **Short Name**.

The screenshot shows the Hancock Software Admin interface. The left-hand navigation menu has 'Admin' selected. The top navigation bar shows the user 'TRAINER_UTILITY_ADMIN'. The main content area has a 'Users' tab selected. The 'Users' table lists several users, including 'Hugh_BPA_Child_1', 'bill_crabtree_bpa_child', 'mrmclatchie@bpa.gov', 'Matt McLatchie', 'Matt McLatchie_BPA_Child', 'Matt_BPA_Child_User', 'aaron_child_admin', and 'TRAINER_UTILITY_ADMIN'. The 'Add' button is highlighted in the top right corner of the table.

- Click the **Add** button, you will see the Add/Edit Organization User screen (which has been completed and ready to save below).
 - All the fields with the red asterisk are required.
 - It is best practice to require a password change – check the Required Reset Password.
 - The Field Role is also required in order to move projects between the Hancock Cloud and MINT.
 - Click **Save** and the new person has been added. The only Program Template is “Primary.” After clicking **Save**, click the X at the top right of the screen.

The screenshot shows the 'Add/Edit Organization User' form. The form contains several fields, some of which are marked as required with a red asterisk. The 'Authentication Type' field is set to 'Sql Authentication' and is highlighted with a red box and the text 'Leave as Sql'. The 'Login Name' field is 'TRAINER_UTILITY_User2'. The 'Full Name' field is 'John Trainer'. The 'Phone' field is '503-503-5032'. The 'Address' field is '123 ABC St'. The 'City' field is 'Portland'. The 'BPI Number' field is empty. The 'User Role' field is set to 'Utility User'. The 'Field Role' field is set to 'Auditor'. The 'Program Templates' field is set to 'Primary'. The 'Required Reset Password' checkbox is checked. The 'Inactive' checkbox is unchecked. The 'Unlock User' checkbox is checked. The 'Email' field is 'btgraves@bpa.gov'. The 'ZIP' field is '97201'. The 'State' field is 'OR'. The 'BPI Expiration Date' field is empty. The 'Save' button is highlighted in green.

Miscellaneous Tips

- The Hancock Cloud has a quick link to resources on the bottom left of the screen called Release Notes. Click it to activate, you will see the direct connection to the Commercial Lighting page on bpa.gov.

