

# NED Update



October 1, 2014



## AGENDA

- 1) Brief Project Status
  - PTCS
  - EEBI
  - NED
- 2) PTCS Online Registry Release 1 Rollout
- 3) NED
  - Stakeholder Engagement Group
  - Progress on NED Releases
  - Feature Highlights
- 4) Q&A



## Brief EECR Project Status



- Previous Release
  - NED Infrastructure (Completed)
- Current Release
  - Working on UES Measures/ Workspaces and Invoicing
- Next Release
  - Custom Projects and Programs
- Adding new Scope
  - Post-2011 Public Process Changes
- Currently on target for: 3rd Quarter FY15

- Release 1
  - Deployed on 10/6
  - SUCCESS!!
- Release 2
  - Additional Enhancements
  - Integration with NED
  - Planned by 2<sup>nd</sup> Quarter FY15



- Regional Reporting
- Working on mapping old historical data to new Taxonomy and Attributes
- Schedule: 3rd Quarter FY15

# PTCS Online Registry Release 1 Rollout

- Includes multiple fixes and Loads of Enhancements
- PTCSNW.com shut down 9/29
- Automatic redirect to [www.PTCS.bpa.gov](http://www.PTCS.bpa.gov)
- Data migrated by team
- Online training webinars to be scheduled for installers, utilities, inspectors, PMCs

**[www.PTCS.bpa.gov](http://www.PTCS.bpa.gov) launches 10/6**

# Stakeholder Engagement Group Participants

1. Debbie DePetris, Clark PUD
2. Dennis Gau, Seattle City Light
3. Duffel Gray, Coos Curry Electric
4. Eric Miler, Benton REA
5. Jed Morrell, City of Monmouth
6. Jeff Stafford, Tacoma Power
7. Jennifer Sherrell, Cowlitz PUD
8. Jessica McLaws, EWEB
9. Kathy Moore, Umatilla Electric
10. Keith Lockhart, Springfield Utility Board
11. Margaret Ryan, PNGC
12. Michael Coe, Snohomish
13. Nicolle Prehn, Columbia River PUD
14. Rob Currier, Emerald PUD
15. Thomas Elzinga, Consumers Power
16. Traci Brock, Wasco Electric
17. Vic Hubbard, Franklin PUD
18. Vicki Bergum, Benton PUD





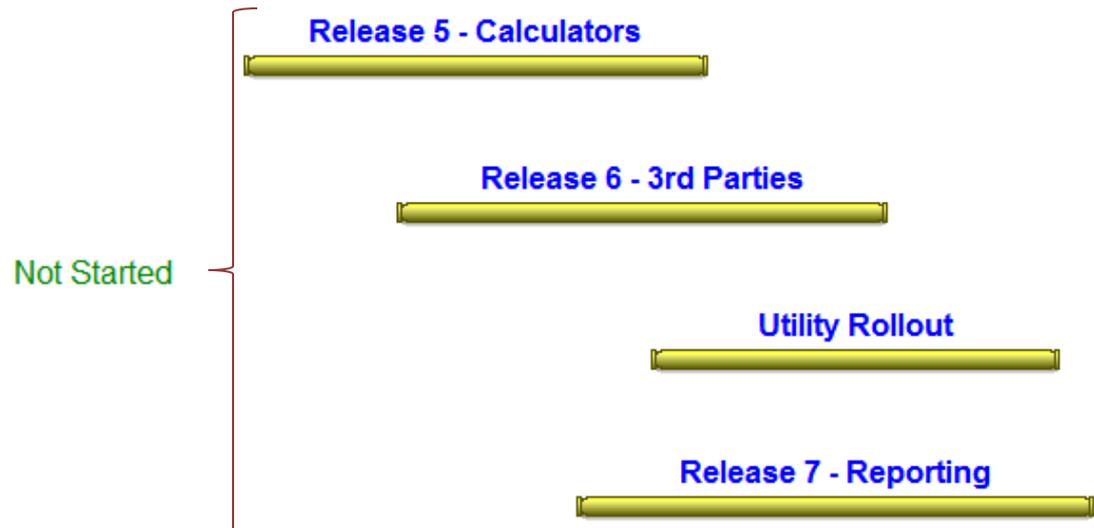
**Release 2 - NED Infrastructure** Completed



**Release 3 - UES Measures** Requirements/Design Completed. Coding In-progress.



**Release 4 - Custom Projects / Programs** Requirements In-progress.



# NED Release 1 & 2 (Completed)

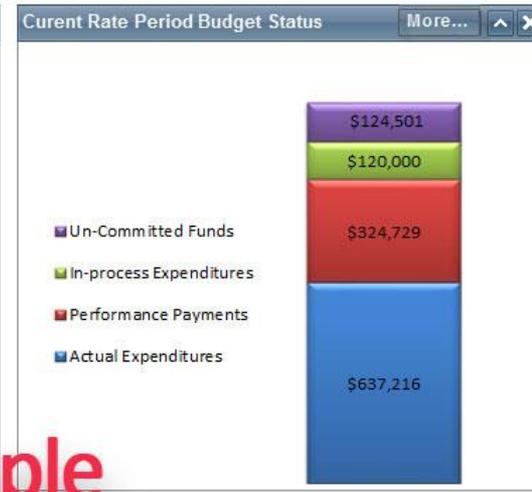
## Communication Support

- a. Ability to see Updates and Announcements made by BPA
- b. Document Download center available to download important documents directly from NED

## Budgets

- a. Ability to view the Utility budgets for all budget categories, Actual Expenditures, Performance Payments, Committed Funds due to work in the pipeline, and Uncommitted funds available.
- b. Eliminate the need to do a contract revision for each budget change. NED will serve as the official record of the budget.
- c. Ability to provide an on-line request for Budget Transfers (including Bi-Lateral transfers, Transfers to/from ESG or Simple Steps, Unassigned Account Requests, etc.)

- Dashboard
- Budget Status
- kWh Savings Status
- Announcements
- Download Center
- System Events



Dashboard Example

- ### Announcements (5 most recent)
- 12/19/13 Smart Water Heat Adds Two New Electrolux Models
  - 12/19/13 Implementation Manual (IM) has been revised
  - 12/03/13 Smart Water Heat Offers Limited-time Increase and Extension to Tier 2
  - 11/26/13 Home Depot Extends Fall Heat Pump Water Heater Promotion to Dec. 31
  - 11/26/13 Issues with the IS 2.0 Summarizer Tool

- ### System Events (5 most recent)
- 12/19/2013 [Joe Peabody](#) has been added as a new user for your account.
  - 12/19/2013 Invoice: [11ES-11233-FY2013-0008](#) (Burley March 2013 Non-Deemed) has been Approved for payment by BPA.
  - 12/10/2013 Proposal for Option 1 Custom Project: [1CS000279](#) (Digital VAV box retrofit - Invoice: [11ES-11233-FY2013-0010](#) (Burley April 2013 Deemed) has been Approved for payment by BPA.
  - 12/3/2013 Invoice: [11ES-11233-FY2013-0008](#) (Burley March 2013 Deemed) was paid by BPA.

- ### Download Center (5 most recent)
- 8/7/2013 [Option 2 calculator detailed instructions 11-14-12.pdf](#)
  - 6/3/2013 [Energy Efficiency.mp4](#)
  - 7/5/2013 [IS 2.0 Update 13 EEER Replacement Status.pdf](#)
  - 5/21/2013 [Deemed NRP Instructions.pdf](#)
  - 7/5/2013 [IS 2.0 Update 12 EEER Replacement Status.pdf](#)

### Your BPA Team

Member	Title	Email	Phone
Paul Munz	Account Executive	<a href="mailto:pgmunz@bpa.gov">pgmunz@bpa.gov</a>	206-220-6763
Dena Hilde	EE COTR	<a href="mailto:dlhilde@bpa.gov">dlhilde@bpa.gov</a>	206-220-6792
Margaret Lewis	EE Representative	<a href="mailto:mllewis@bpa.gov">mllewis@bpa.gov</a>	503-230-7552
Tony Koch	EE Engineer	<a href="mailto:jakoch@bpa.gov">jakoch@bpa.gov</a>	206-220-6777

- Dashboard
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### Budget Status - Summary for Current Rate Period 2014-2015

**Total Budget: \$8,062,871.55**  
**Remaining Funds: \$3,775,716.81**  
**Available for Transfers: \$3,775,716.81**

#### Invoices Paid this Rate Period

Number of Invoices Paid: 1  
 Total Actual Expenditures: \$3,449,560.45

#### Performance Payments

Maximum % of Budget: 20 %  
 Maximum Allowed: \$1,871,598.71  
 Performance Payments Received: \$837,594.29  
 Remaining Available \*: \$1,034,004.42  
 \* cannot exceed remaining funds

Category	Amount
Actual Expenditures	\$3,449,560
Performance Payments	\$837,594
Uncommitted Funds	\$3,775,717

	Rate Period	Budget	A		B		C		D = (A - (B+ C))		E		F = (D-E)	
			Total Budget	%	Actual Expenditures	%	Performance Payments	%	Remaining Funds	%	In-Process Expenditures	%	Un-Committed Funds	%
▼ Rate Period: 2014-2015														
▶ View	2014-2015	Energy Smart Grocer	\$ 500,000.00	100%	\$ -	0%	\$ -	0%	\$ 500,000.00	100%	\$ 19,244.00	4%	\$ 480,756.00	96%
▶ View	2014-2015	Energy Smart Industrial	\$ 295,122.00	100%	\$ -	0%	\$ -	0%	\$ 295,122.00	100%	\$ -	0%	\$ 295,122.00	100%
▶ View	2014-2015	Utility Budget	\$ 7,267,749.55	100%	\$ 3,449,560.45	47%	\$ 837,594.29	12%	\$ 2,980,594.81	41%	\$ -	0%	\$ 2,980,594.81	41%
		Totals	\$ 8,062,871.55	100%	\$ 3,449,560.45	43%	\$ 837,594.29	10%	\$ 3,775,716.81	47%	\$ 19,244.00	0%	\$ 3,756,472.81	47%
▶ Rate Period: 2016 - 2017														

# NED Release 1 & 2 (Completed)

## Common functions

- a. Ability to optionally track Utility Costs for all Measures/Projects
- b. Immediate validation and feedback on all data bulk uploaded or entered into screens
- c. Warning messages to highlight potential duplicate projects/measures
- d. Ability to view history of projects/measures
- e. Ability to search sort, select, copy previous projects/measures
- f. Ability to export all data shown in tables to Excel or CSV format
- g. Ability to re-upload erroneous data (for some type of data fix directly in NED screens)
- h. Ability to attach supplemental documents directly to measures/projects  
([eedocs@bpa.gov](mailto:eedocs@bpa.gov) email will no longer be needed)
- i. Audit Trail of changes made in the system
- j. Ability to have Contractors / Trade Allies enter data on your behalf and track what data they entered
- k. Help Functions available to guide you through NED Screens

# NED Release 3 (Requirements/Design Complete. Coding in-progress.)

## Deemed (UES) Measures

- a. Automatically filtered to allowed Heating/Cooling Zones for your utility
- b. Two methods to bulk upload: Excel and XML
- c. Ability to sort and select measures to implement
- d. Ability to add measures to your Favorites
- e. Ability to bulk upload or directly enter UES Measures into NED Screens
- f. Ability to create invoices and invoice corrections



eXtensible  
Markup  
Language XML

Workspace Measure Search Search By Refno ★ Favorites

Selection Options... Search Options...

(favorites are green below)

**Sector**: Residential  
**Funding Type**: All  
**Status**: Approved  
**Category**: All  
**End Use**: All  
**From Est. Completion**:  
**To Est. Completion**:  
**TAP**: All

**UES Measures**

<input type="checkbox"/>	Ref No	Suffix	Measure Type	Estimation Method	EEI	SF	NR	Effective Date	Expiration Date	Sector	End Use	Category	TAP	Heating Z
<input type="checkbox"/>	<a href="#">LHVEN11530</a>	01	UES BPA	BPA Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04/01/2012	09/30/2014	Residential	HVAC	Envelope	Air Sealing	All
<input type="checkbox"/>	<a href="#">RELPL11972</a>	01	UES BPA	BPA Qualified	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/01/2013		Residential	Electronics	Plug Load	Power Strips	All
<input checked="" type="checkbox"/>	<a href="#">RELPL11973</a>	01	UES BPA	BPA Qualified	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/01/2013		Residential	Electronics	Plug Load	Power Strips	All
<input type="checkbox"/>	<a href="#">RELPL11974</a>	01	UES BPA	BPA Qualified	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/01/2013		Residential	Electronics	Plug Load	Power Strips	All
<input type="checkbox"/>	<a href="#">RHVEN11530</a>	02	UES BPA	BPA Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	10/01/2014		Residential	HVAC	Envelope	Air Sealing	All
<input type="checkbox"/>	<a href="#">RIRHA40011</a>	01	UES BPA	BPA Approved	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	04/01/2010		Residential	Irrigation	Hardware	Behavioral	All
<input type="checkbox"/>	<a href="#">RWHHR10934</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2007		Residential	Water Heating	Heat Recovery	Water Heat Recovery	All
<input type="checkbox"/>	<a href="#">RWHHR10935</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2007		Residential	Water Heating	Heat Recovery	Water Heat Recovery	All
<input type="checkbox"/>	<a href="#">RWHHR10936</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2007		Residential	Water Heating	Heat Recovery	Water Heat Recovery	All
<input type="checkbox"/>	<a href="#">RWHHR10937</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2007		Residential	Water Heating	Heat Recovery	Water Heat Recovery	All
<input type="checkbox"/>	<a href="#">RWHHR10938</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2007		Residential	Water Heating	Heat Recovery	Water Heat Recovery	All
<input type="checkbox"/>	<a href="#">RWHHR10939</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2007		Residential	Water Heating	Heat Recovery	Water Heat Recovery	All
<input type="checkbox"/>	<a href="#">RWHHR10940</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2007		Residential	Water Heating	Heat Recovery	Water Heat Recovery	All
<input type="checkbox"/>	<a href="#">RWHPI10941</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2007		Residential	Water Heating	Pipe Insulation	Pipe Insulation	All
<input type="checkbox"/>	<a href="#">RWHPI10942</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2007		Residential	Water Heating	Pipe Insulation	Pipe Insulation	All
<input type="checkbox"/>	<a href="#">RWHWH10943</a>	01	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2012	09/30/2013	Residential	Water Heating	Water Heaters	Water Heaters	All
<input type="checkbox"/>	<a href="#">RWHWH10943</a>	02	UES RTF	RTF Approved	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10/01/2013		Residential	Water Heating	Water Heaters	Water Heaters	All



Select View Show All

Delete Copy Attach

<input type="checkbox"/>	moved	status	docs required	attach	RefNo	Suffix	Sector	TAP	Funding Source	Quantity	Unit	Completion Date	Total Utility Cost (\$)	Per Unit Bu Savings (\$)
		ACT			IMDM030019	01	Industrial	Motor Rewind			per Sq Ft			
		ACT			IMDM030022	02	Industrial	Motor Rewind			per Sq Ft			9,60
		ACT			IMDM030025	02	Industrial	Motor Rewind			per Sq Ft			18,60
		RDY			RWHWU1098	01	Residential	Clothes Washer	EEI	10.00	per Piece	12/31/2013		31
		RDY			RWHWH1096	01	Residential	Clothes Washer	EEI	1.00	per Piece	12/31/2013		13
		RDY			RLILF10835	01	Residential	Fixtures	EEI	2.00	per Piece	12/31/2013		9
		RDY			RWHWU1101	01	Residential	Clothes Washer	EEI	3.00	per Piece	12/31/2013		16
		WRN	✓		RHVHS11381	01	Residential	Duct Sealing	EEI	120.00	per Sq Ft	12/07/2013		1,14
		ACT			LHVEN10131	01	Residential	Insulation	EEI	648.15	per Sq Ft	12/07/20013		
		WRN	✓		RHVHS10706	01	Residential	Ground Source Heat	EEI	1.00	Per	12/07/2013		46
✓		RDY			RHVEN10134	01	Residential	Insulation	SF	1,164.20	pre SqFt of	12/15/2013		
✓		RDY			RHVEN10136	01	Residential	Insulation	SF	364.00	Per SqFt of	12/15/2013		
✓		WRN			RHVEN10134	01	Residential	Insulation	SF	1,949.35	pre SqFt of	12/15/2013		
✓		RDY			RHVEN10185	01	Residential	Insulation	SF	34.00	Per SqFt of	12/15/2013		2

Required Data Missing

Invalid Date

# NED Release 4 (Requirements in-progress)

## Option 1 Custom Projects

- a. Ability to create and obtain approvals for Option 1 proposals on-line
- b. Ability to create and obtain approvals for Option 1 Completion Reports on-line
- c. Option 1 Projects can be entered at either Proposal or Completion Report Stage

## Option 2 Custom Projects

- a. Ability to bulk upload Option 2 projects with immediate validation & feedback

## Custom Programs

- a. Ability to manage Evaluated Custom Programs
- b. Ability to manage Pre-approved M&V Custom Programs



# Custom Project

Serving Utility

Project Name

BPA Project ID

Utility Assigned Project ID

Status

- Project Info
- Proposal
- Measures
- Progress Payment Requests
- Completion Report
- Supporting Documentation
- Activity/Approval Log

Project Name

Utility Assigned Project ID

Sector

Utility Retail Rate

Process Type

Resource Opportunity

Are you Submitting a Proposal?  Yes  No

Is this project covered under a non-disclosure agreement (NDA) with BPA?  Yes  No

ESIP or Outreach Engineer

3rd Party Contract No.

Audit Tracking No.

Brief Project Summary (1-3 Sentences)

1

Energy Smart Industrial

This project associated with an Energy Project Manager via Energy Smart Industrial Program 3

Manager Name

TSP Number

4

Company

Company Name

Company Mailing Address

Facility

Facility Address   check if same as Company Address

Unique Site ID

Building Name(s)

Federal Facility  Yes  No

Primary Building Use

Secondary Building

Project Contact (person at facility)

Same as Login

Contact Name

Job Title

Phone Number

Email

2

Dashboard

Budget Status

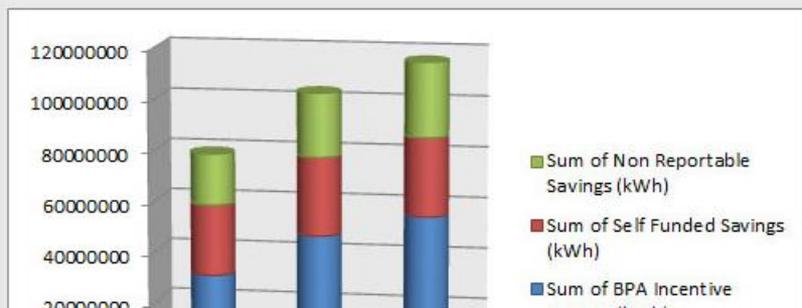
kWh Savings Status

Announcements

Download Center

System Events

Serving Utility Name	Calendar Year	Sector	Savings Type	BPA Incentive Savings (kWh)	Self Funded Savings (kWh)	Non Reportable Savings (kWh)	Total Savings (kWh)
▼ ABC Utility							
▼ 2012							
▼ Commercial							
			UES Measure	15,286.16	0.00	0.00	15,286.16
			Option 2 Custom Project	20,205,809.32	0.00	0.00	20,205,809.32
			Energy Smart Grocer	1,933,844.19	2,557,321.00	0.00	4,491,165.19
			<b>Total</b>	<b>22,154,939.67</b>	<b>2,557,321.00</b>	<b>0.00</b>	<b>24,712,260.67</b>
▼ Industrial							
			BPA Green Motors	4,793.00	0.00	0.00	4,793.00
			Option 2 Custom Project	6,284,077.09	0.00	0.00	6,284,077.09
			<b>Total</b>	<b>6,288,870.09</b>	<b>0.00</b>	<b>0.00</b>	<b>6,288,870.09</b>
▼ Residential							
			BPA Simple Steps	546,987.00	0.00	0.00	546,987.00
			UES Measure	32,896,854.70	0.00	0.00	32,896,854.70
			<b>Total</b>	<b>33,443,841.70</b>	<b>0.00</b>	<b>0.00</b>	<b>33,443,841.70</b>
		<b>Total</b>		<b>61,887,651.46</b>	<b>2,557,321.00</b>	<b>0.00</b>	<b>64,444,972.46</b>
▼ 2013							
		▶ Commercial		17,037,618.85	0.00	29,214,008.53	46,251,627.38
		▶ Industrial		1,130,388.34	3,669,587.18	0.00	4,799,975.52
		▶ Residential		11,832,312.93	0.00	0.00	11,832,312.93
		<b>Total</b>		<b>30,000,320.12</b>	<b>3,669,587.18</b>	<b>29,214,008.53</b>	<b>62,883,915.83</b>
<b>Total ABC Utility</b>				<b>113,082,141.98</b>	<b>7,555,872.23</b>	<b>29,214,008.53</b>	<b>149,852,022.74</b>





# Questions and Answers