EEIT: Energy Efficiency Information Tracker

Summit Energy Tech Corp [www.summitenergytech.com]

Features

- Imports BPA UES Measure Excel files
- Exports measures in BPA-formatted Excel files
- Easy measure filtering and sorting
- Tracks measures against budget
- Allows user to save "favorites"
- Upload file attachments with measures
- User self-registration with Admin approval
- Sector-based measure data and budget exports

Tech Benefits

- Subscription model – nothing to install
- Intuitive User Interface
- Browser-based application runs in Chrome, Internet Explorer, or Firefox
- Hosted at our primary data center
- Backed up to our secondary Data Center

What Sets Us Apart

Summit Energy Tech Corp [www.summitenergytech.com]
Michael Sulis, Senior Systems Analyst <msulis@summitenergytech.com>

Summit Energy Tech
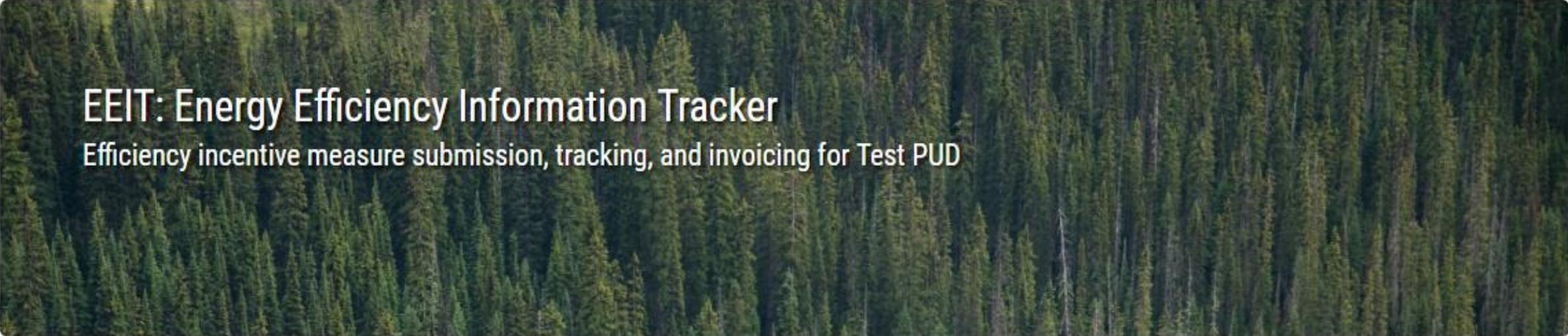technology services for the energy industry

- We're small and agile

- We understand the energy industry

- We have expertise in a wide range of technology

Core Capabilities

- Server Virtualization and Hosting
- Field network design, installation, and monitoring
- SCADA software development, deployment, and integration
- Custom software and database solutions for data-intensive applications
- Disaster Recovery planning and implementation
- Security assessment, policy assistance, and implementation
- Requirements definition and software acquisition assistance
- Monitoring and data integration of industry standard reclosers, relays, and meters

EEIT Tour: User Registration

User registers for an account, and then receives an email to confirm their address

Administrator approves User

Pending Users

ID ▾	first name ⇅	last name ⇅	email ⇅	utilities ⇅	locked out ⇅	administrator ⇅		
1064	Michael	Sulis	michael.j.sulis@gmail.com				Edit	⊘ Delete

Approved Users

ID ▾	first name ⇅	last name ⇅	email ⇅	utilities ⇅	locked out ⇅	administrator ⇅		
1020	Brandy	Neff	bneff@pngcpower.com	TEST01, TEST02		❶	Edit	⊘ Delete
1021	EEIT	ADMIN	eeit@pngcpower.com	TEST01, TEST02		❶	Edit	⊘ Delete
1063	Michael	Sulis	msulis@gmail.com	TEST01, TEST02			Edit	⊘ Delete

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Administrator assigns permissions to User

User searches for a specific UES Measure Type. User marks the measure as a favorite with a star

⚙ Measures   UES Measure List   Invoices   Dashboard   Uploads   Support   User: michael.j.sulis@gmail.com   Log off

UES Measure List

▼ Show/Hide Filters   ⬇ Download CSV

Utility	TEST01 ▼	filters for UES Measure Types which have a Heating or Cooling zone compatible with the selected utility
UES Measure Code		searches the 'measure code' column
UES Measure Description	ductless heat pump idaho	searches the 'measure name' column, allows for multiple words to be matched anywhere
Sector	▼	filters list based on 'sector' column
Tech/Act/Practice		filters list based on 'tech/act/practice' column
Include Expired	☐	
Favorites Only	☐	

Apply Filters [Enter]   **Clear Filters [ESC]**

Create using this type		code	measure name	payment	kWh	HZ	CZ	sector	end use category	tech/act/prac	bldg type	effective
⚙ New	★	RHVHS13257	Ductless Heat Pumps Single Family - New Single Head or Multiple Head Idaho	$700.00	3252.28	1	All Cooling Zones	Residential	HVAC HVAC System	Ductless Heat Pumps	Single Family	10/01/20...

Showing 1 to 1 of 1 entries

« Previous   **1**   Next »

User enters measure details

Enter New Measure

Save **Cancel**

Field	Value
Utility *	TEST01
Completion Date *	07/03/2018
UES Measure Code *	RHVHS13257

☐ Custom Project   ☐ Lighting Calculator

UES Measure Description — *Ductless Heat Pumps Single Family - New Single Head or Multiple Head Idaho [$700.00 per unit]*

Field	Value
Quantity *	1
File Attachments	Browse…

Calculator Fields   🔒 Unlock

Field	Value
Calc. Savings (kWh/unit)	
Calc. Payment ($/unit)	
Calc. Project Cost (total $)	
Calc. BC Ratio	
Calc. VFD Savings (kWh/unit)	
Direct Contractor Payment ($)	
Perf. Payment Override ($)	
Self-funded amount (kWh)	

On Hold ☐
Do Not Export ☐

Field	Value
Funding Source *	EEI
Federal Facility? *	No
Unique Site ID	12345
Site Name	
Site Address	123 Main
Site City	Anytown
Site State	ID
Site ZIP	99951

Field	Value
Low Income Measure Costs (total $)	
Low Income Repair Costs (total $)	
PTCS Measure ID	
Utility Notes	
Wildcard	
Invoiced Amount	
Previously Paid Amount ($)	
Previously Saved Amount ($)	

Created By	**Michael Sulis**	Modified By	
Created At	**7/15/2018 11:13:09 PM**	Modified At	

User enters a "Lighting Calc" measure type

Measures

[New Measure ▾] [▼ Show/Hide Filters] [⬇ Download to Excel]

⚙ Use the MEASURE LIST to find the right Measure Code
⚙ This is a CUSTOM PROJECT, a LIGHTING CALC, or I already know the MEASURE CODE

					sector	site info	qty	kWh/unit	kWh	perf $	$/unit	incent. $	contractor	previous	due	invoice
00010	☐ on hold		TEST01	07/03/2018	[RHVHS13257] Ductless Heat Pumps Single Family - New Single Head or Multiple Head Idaho	Residential	123 Main, Anytown, ID, 99951	1	3,252.28	3,252.28	$260.18	$700.00	$700.00			$960.18		⊘ Delete

Showing 1 to 1 of 1 entries

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items per page:
20 ▾

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User enters information and uploads the Lighting Calc spreadsheet

Enter New Measure

✔ Save   Cancel

• For CUSTOM or LIGHTING measure types, you must include at least one attachment.

Utility *	TEST01 ▾	Calculator Fields	🔓 Lock
Completion Date *	07/03/2018 ✕ ⬍ ▾	Calc. Savings (kWh/unit)	25000
UES Measure Code *	LIGHTING_CALCULATOR	Calc. Payment ($/unit)	5000
	☐ Custom Project ☐ Lighting Calculator	Calc. Project Cost (total $)	
Sector *	Commercial ▾	Calc. BC Ratio	
UES Measure Description	*Custom Lighting Calculation (enter Calc kWh Savings and Reimbursement below) [$0.00 per unit]*	Calc. VFD Savings (kWh/unit)	
		Direct Contractor Payment ($)	
		Perf. Payment Override ($)	1000
Quantity *	1	Self-funded amount (kWh)	5000
File Attachments	Browse...		

Depending on your requirements, a Measure can be as simple as a few fields...

Enter New Measure

✓ **Save**　　Cancel

Utility *	TEST01 ▾
Completion Date *	07/03/2018
UES Measure Code *	RWHWU13712
	☐ Custom Project　☐ Lighting Calculator
UES Measure Description	*Showerheads Showerheads - Primary - Simple Steps 1.5 or less Gallons Per Minute (GPM) Electric Water Heater Direct Install [$23.00 per unit]*
Quantity *	5
File Attachments	Browse...

Measures can be placed "On Hold" to delay processing

Measures

[New Measure ▾] [🔽 Show/Hide Filters] [⬇ Download to Excel]

ID	flags	status	util.	completion	ues measure	sector	site info	qty	kWh/unit	kWh	perf $	$/unit	incent. $	contractor	previous	due
00012	☑ on hold	HOLD	TEST01	07/03/2018	[RWHWU13712] Showerheads Showerheads - Primary - Simple Steps 1.5 or less Gallons Per Minute (GPM) Electric Water Heater Direct Install	Residential		5	380.07	1,900.35	$152.03	$23.00	$115.00			$267.03
00011	☐ on hold		TEST01	07/03/2018	[LIGHTING_CALCULATOR] Custom Lighting Calculation (enter Calc kWh Savings and Reimbursement below)	Commercial	Leathers Fuels, 123 Main, Albany, OR, 97322	1	25,000	25,000	$1,000.00	$5,000.00	$5,000.00			$6,000.00
00010	☐ on hold		TEST01	07/03/2018	[RHVHS13257] Ductless Heat Pumps Single Family - New Single Head or Multiple Head Idaho	Residential	123 Main, Anytown, ID, 99951	1	3,252.28	3,252.28	$260.18	$700.00	$700.00			$960.18

Showing 1 to 3 of 3 entries

[« Previous] [1] [Next »]

Administrator creates an invoice

Generate Invoices

Invoice Through
07/31/2018
All uninvoiced measures through and including this date will be included

BudgetPeriod
FY2018/2019

Invoice Number
INV001
This is the base Invoice Number, individual member invoices will have the utility abbreviation appended.

Note to Users
Testing the new system
This text will be included on communication to users related to these invoices.

Administrator Notes
REF#3223
Administrator notes are private and not included in communication to users or printed on invoices.

Generate Invoices

Cancel

Invoice Results

Invoice Number	INV001_TEST01
Invoice Through	07/31/2018
Utility	Test Utility 01
Account Number	123456
kWh Savings	28252.28
kWh Prev. Recorded	-0.00
New kWh Savings	28252.28

Incentive Payment	$5,700.00
Performance Payment	$1,260.18
Direct to Contractor	-$0.00
Previously Paid	-$0.00
Amount Due	$6,960.18

Budget	$1,000,000.00
Budget Used	$6,960.18
Budget % Used	0.7%
Performance Payment this Period	$1,260.18
Performance Payment % of Budget	0.1%
Performance Payment Max %	30.0%

Note to Users Testing the new system

Date / ID	UES Measure	Qty	Payment per Unit	Incentive $ Due	kWh per Unit	Performance $ Due	Direct to Contractor	Previously Paid	Total Due
07/03/2018 [# 10]	[RHVHS13257] Ductless Heat Pumps Single Family - New Single Head or Multiple Head Idaho	1.00	$700.00	$700.00	3252.28	$260.18	$0.00	$0.00	$960.18
07/03/2018 [# 11]	[LIGHTING_CALCULATOR] Custom Lighting Calculation (enter Calc kWh Savings and Reimbursement below)	1.00	$5,000.00	$5,000.00	25000.00	$1,000.00 [2]	$0.00	$0.00	$6,000.00
	Invoice Totals			$5,700.00		$1,260.18	$0.00	$0.00	$6,960.18

[2] indicates a reduced Performance Payment, either as requested by utility or due to Performance Payment budget cap

Invoice management features

Invoices

ID:3

Export Files — Exports BPA Excel Workbook and all relevant uploaded files to C:\EEITTestFiles\Exports

Email Invoices — Sends invoices to users based on their utility permissions

INVOICED — Mark all measures as 'Invoiced' to indicate that payments have been made

PAID — Mark all measures as 'Paid'

RECONCILED ▾ — Mark measures as 'Reconciled' for selected Utility

Cancel Invoice — Removes 'Invoiced' status from all measures, without adjusting 'Previously Paid' amounts

Un-invoice — Removes 'Invoiced' status from all measures, and moves reimbursed amounts into the 'Previously Paid' amount

Re-invoice — Deletes this entire set of invoices, then recreates it ensuring no new measures are picked up

Delete — Deletes this entire set of invoices

Add Payment   **Total Payments** $6,960.18

Payment Date	Amount ($)	Notes		
7/15/2018 12:00:00 AM	$6,960.18	Payment ref #123	Edit	⊘ Delete

Invoice management features

Invoices

⊕ Generate Invoices   **▼ Show/Hide Filters**

All Measures in Invoice Group ID3 have been marked as INVOICED.

ID	number	invoiced	through	total $	total kWh		
3	INV001	✔	7/31/2018	$6,960.18	28,252.28	View	⊘ Delete

Showing 1 to 1 of 1 entries

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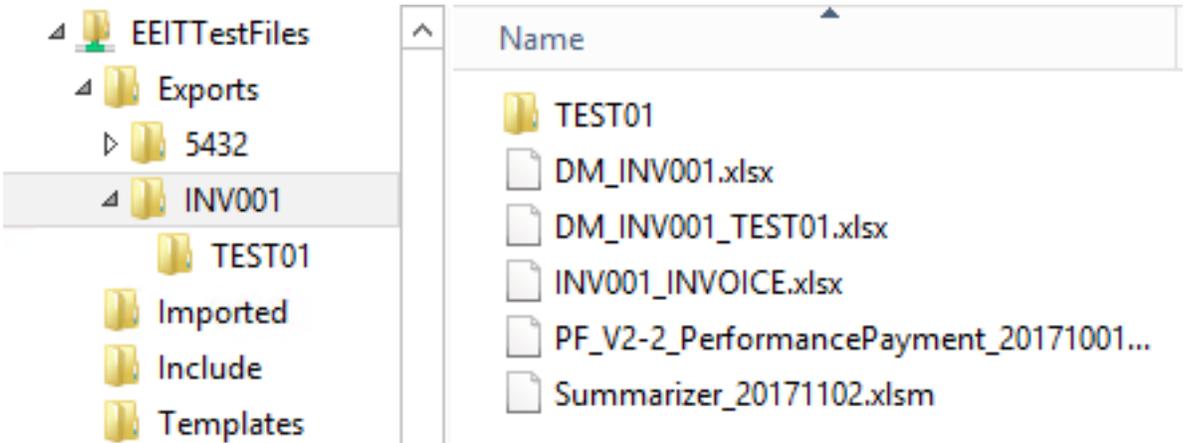
Dashboard Summary

Dashboard

FY2018/2019 ▾   ☑ Include Uninvoiced Measures

Utility Name	Test Utility 01	Budget ($)	$1,000,000.00
Budget Period	FY2018/2019	Budget Used ($)	$7,227.21
kWh Savings	30152.63	Budget Remaining ($)	$992,772.79
Perf. Payment % of Budget	0.1%	Budget % Used	0.7%
Total Performance Payment	$1,412.21	Budget % Remaining	99.3%

Invoice	Through	Measures	kWh Savings	Incentive ($)	Performance ($)	Contractor ($)	Previously Paid ($)	Total
INV001	07/31/2018	2	28,252.28	$5,700.00	$1,260.18	$0.00	$0.00	$6,960.18
UNINVOICED	10/01/2019	1	1,900.35	$115.00	$152.03	$0.00	$0.00	$267.03
TOTALS		3	30152.63	5815.00	$1,412.21	0.00	0.00	$7,227.21

Energy and Incentive Export by Sector

Generate Sector Report

Start Date

01/01/2018

All measures included on an invoice with an 'Invoice Through' date on or after this date will be included

End Date (inclusive)

07/31/2018

All measures included on an invoice with an 'Invoice Through' date before or on this date will be included

Budget Period

FY2018/2019 ▾

Generate Report

Cancel

	A	B	C	D	E	F	G	H	I	J
1	Start Date	Through Date	Funding Source	Utility Name	Utility	Sector	Incentive ($)	Performance ($)	Savings (kWh)	Total Payments ($)
2	2017-10-01	2019-09-30	EEI	Test Utility 01	TEST01	Commercial	$5,000.00	$1,000.00	20,000	$ 6,000
3	2017-10-01	2019-09-30	EEI	Test Utility 01	TEST01	Residential	$700.00	$260.18	3,252	$ 960
4										$ -

Invoice Export produces BPA-formatted Excel file, separate file for Reduced Performance Payments, and all related file attachments

	A	B	C	D	E	F	G	H	I	J	K	L
1	OPTIONAL	REQUIRED FOR ALL MEASURES					REQUIRED FOR SOME MEASURES					LOW
2							(Consult IM for specific measure requirements. Most equipment requires unique IDs and address information. Residential exceptions include CFLs, showerheads, appliances, pipe insulation and thermostats. Non-residential/multi-sector exceptions include traffic signals, exit signs, appliances, kitchen equipment, network power management, power strips, showerheads, water heaters and ag stock tanks.)					
3	CONTAINER NAME	FUNDING SOURCE	REFERENCE NUMBER	QUANTITY	COMPLETION DATE	FEDERAL FACILITY	UNIQUE SITE ID	SITE NAME	STREET	CITY	STATE	ZIP	LO MEA
4	Optional entry. May use this field in the future to allow users to build containers before invoicing.	Type of funds paid for the measure. (Use dropdown box to select EEI/Self-funded/Non-reportable	Reference number from the UES Measure List for the measure.	Number of units claimed using the unit definition in the IM.	Date the measure was installed and all requirements were achieved. (MM/DD/YYYY)	Was measure installed in a federal facility? (Use dropdown box to select Yes/No)	Utility assigned end user account or member number. Maximum length 50 characters.	Descriptive name of end user (i.e., Safeway) where measure was installed. Never collected for residential measures; do not include personally identification information. Include building name if multiple buildings at a single location.	Physical address where the measure was installed. (Use dropdown box to select State). Zip field allows for zip+4 format.				Project inc
5	Example	EEI	RWBHO11090	1.00	04/02/2012	No	554654654654	Example with all inputs	Test Street		Test	ID	55555
6	INV001_TEST01	EEI	RHVHS13257	1.00	07/03/2018	NO	12345		123 Main		Anytown	ID	99951

EEIT: For more information…

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