

NRR-DR

Section 5: Software Instructions

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This section explains how to use the NRR-DR (SPC) 2007 CD-ROM, which is available **free of charge** from your Utility Administrator. The CD-ROM contains a custom software application—designed for Windows-compatible computers—that facilitates completion of the required NRR-DR forms. The CD-ROM also contains the *2007 NRR-DR Efficiency Program Procedures Manual* and forms, which you can print out in hard copy form.

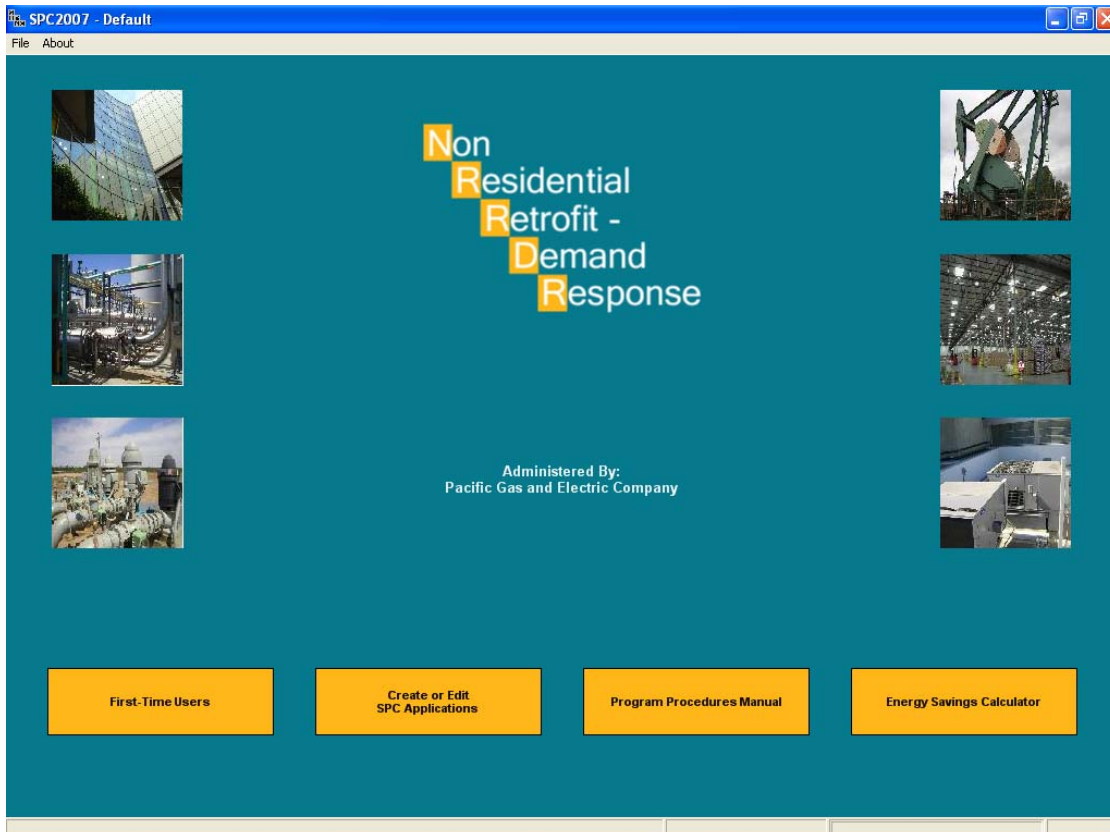
5.1 Software Package Overview

The NRR-DR (SPC) 2007 Software is a custom software application designed solely to simplify and facilitate completion of the required forms for California's 2007 NRR-DR program. The software employs assumptions or other stipulations that are specific to the program. Use of this software package for any other purpose is not recommended. The 2007 NRR-DR Software is designed to facilitate the preparation and administration of Applications for the 2007 program.

The NRR-DR (SPC) 2007 Software includes a series of data input screens that allow applicants to complete each report electronically. By stepping through the screens associated with a specific Project, you can systematically enter all of the necessary data and generate the desired submittal document(s).

From the Main Page (initial screen), start by clicking one of the following four buttons, depending on which function you wish to use:

- **First-Time Users.** This handy guide features screen samples designed to quickly orient the user to the software.
- **Create/Edit Application.** Click this button to fill out an Application—or an Installation Report or an Operating Report.
- **Program Procedures Manual.** The entire *2007 NRR-DR Procedures Manual* is viewable as PDF files.
- **Energy Savings Calculator.** Click this button to access the estimation software tools for determining the expected energy savings from your project. The output from this tool can be saved as a stand-alone measure or can be imported into a new Application.



5.2 Software Installation

The NRR-DR (SPC) 2007 Software is available on CD-ROM and can be obtained **free of charge** from your Utility Administrator by visiting the respective Utility website listed in Section 1.9. Subsequent upgrades to the software will also be available through the Utility websites. If the user has an internet link established when the program is started, the software will check to see if the version running is up-to-date. If the version is not current the software will direct the user to update as is explained in section 5.2.3.

5.2.1 Software Installation from CD-ROM

- Step 1. Close all open Applications on your computer prior to installing the software.
- Step 2. Insert the CD-ROM into your PC's CD-ROM or DVD drive.
- Step 3. If your CD-ROM/DVD is set up for auto-run, then the set-up software will activate automatically and software installation will be initiated. If your CD-ROM is not set up for auto-run, you must locate the *autorun.exe* program file located on the CD-ROM using Windows Explorer. Once you locate the *Autorun.exe* file, double-click on it to initiate software installation.
- Step 4. Click the *Installation* button. Follow the directions provided by the set-up software to complete the installation process. When installation is complete, the software will ask you to create a shortcut on your desktop to facilitate use of the program.

5.2.2 Software Update Self-Extracting Zip File Installation

Updates to the software will be provided in a self-extracting zip file named *SPC2007update.exe*, which can be executed from the utility web page link.

- Step 1. Double-clicking the *SPC2007update.exe* link will bring up a window that presents the request "What would you like to do with this file?". Select the "Run this program from its current location" option and click the *NEXT* button.
- Step 2. Follow the directions provided by the set-up software to complete the installation.

5.2.3 Supporting Software Installation from CD-ROM

The software uses two other software applications during normal operation. Acrobat Reader (Version 4.0 or higher) is used to view the *2007 NRR-DR Program Procedures Manual*, while the Internet Explorer web browser (version 5.5 or higher) is used for display and printing of submittal materials. The software will automatically use these software applications if they already reside on your computer. If you do not have one or both of these Applications, they have been provided on the CD-ROM and may be installed at any time using the following directions:

- Step 1. Close all open Applications on your computer prior to installing the software.
- Step 2. Insert the CD-ROM into your PC's CD-ROM or DVD drive.
- Step 3. If your CD-ROM/DVD is set up for auto-run, then the set-up software will activate automatically and software installation will be initiated. If your CD-ROM is not set up for auto-run, then you must locate the *autorun.exe* program file located on the CD-ROM using Windows Explorer. Once you find it, double-click on the *autorun.exe* file to initiate software installation.

- Step 4. Select either *Install Acrobat Reader* or *Install Internet Explorer* from the installation menu. Follow the directions provided by the set-up software in order to complete the installation process.

5.2.4 Transferring Software to a New Computer

In the current release, the software maintains one database file per program year to store all of the inputs necessary for submittal. Therefore, the following steps must be followed to preserve any previous work when transferring information to a new computer:

- Step 1. *After installing the software on the new computer* you must copy the database file to the directory of the new machine that contains the software. This database file, *SPC2007.mdb*, is located in the same directory as the software. (For a default, installation, this directory will be *C:\Program Files\SPC2007*.)
- Step 2. Follow the instructions for installing the software from CD-ROM (see Section 5.2.1 above), ensuring that you define the location of the software to coincide with the location of the *SPC2007.mdb* file that you just transferred in Step 1.

It is important to remember that a single database is used to store all information for each program year. *Therefore it is recommended that a single computer be used for entering and maintaining information for the software. Use of multiple computers is not recommended at this time.*

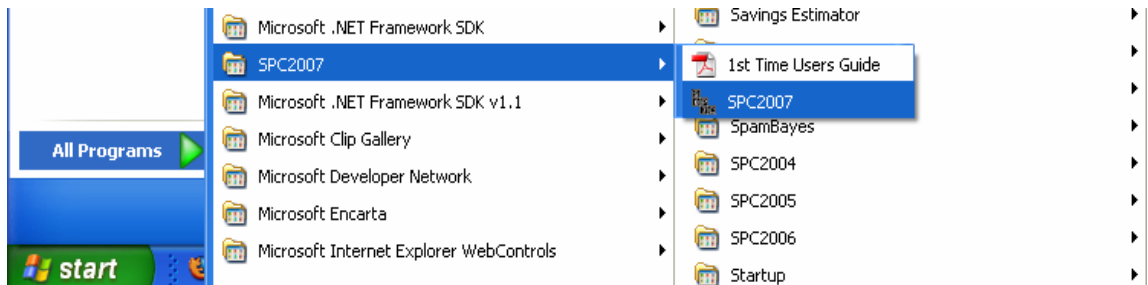
5.3 Basic Software Concepts

This section describes how to start and exit the NRR-DR (SPC) 2007 software application, and provides information on saving and printing your work.

5.3.1 Starting the Software

If you installed a shortcut icon to the software on your desktop, then double-clicking on this icon will start the software application. If you did not install a shortcut, then you must:

1. Click the *Start* button, located on the lower left corner of your screen, to bring up the Windows start menu.
2. Move the cursor to the *Programs* selection to bring up the list of installed program groups.
3. Move the cursor to the program group where the software was installed. (If you used the default settings during installation this will be *SPC 2007*.)
4. Having done this, the SPC 2007 program icon should appear to the right of the program group. Click on this icon to start the software application.



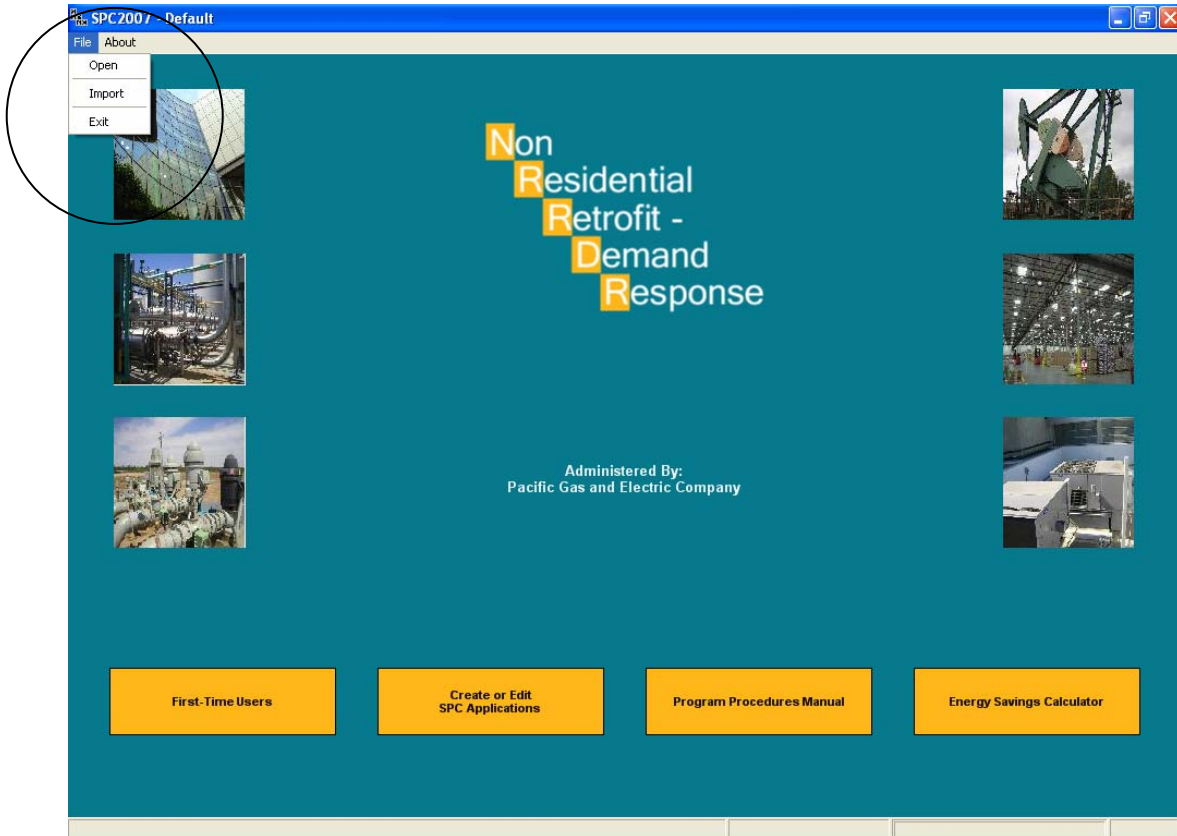
5.3.2 Saving Your Work

The software application uses two embedded databases during normal operation. A working database is used to temporarily record Project inputs during a data entry session. Temporary storage allows you to make many changes without affecting the data that will be ultimately submitted. When you click the *Save* button located at the bottom of an input screen, you save the inputs to a “permanent” database, i.e., the permanent database is updated using the current values from the temporary database.

It is extremely important to remember that the NRR-DR (SPC) 2007 Software does not automatically store data to the permanent database. ***Exiting the NRR-DR (SPC) 2007 Software, or returning to the “Main Page” without first saving your work, will result in loss of your inputs.*** However, the NRR-DR (SPC) 2007 Software will prompt you to save your work if you are exiting or returning to the Main Page without first saving your work.

5.3.3 Viewing Previous Submittal Information

When creating the electronic submittal data file, the NRR-DR (SPC) 2007 Software extracts information from the main database that is specific to the Project covered by the submittal. (Remember that the main database may contain information about multiple Projects.) The submittal data may be viewed at any time using the NRR-DR (SPC) 2007 Software via the *File* menu located on the Main Page. Selecting *File* and then *Open* will bring up a file browse box that allows you to direct the software to the location of the submittal file. Highlighting and selecting the submittal filename will cause the submittal database information to be loaded into the working data file for subsequent viewing.

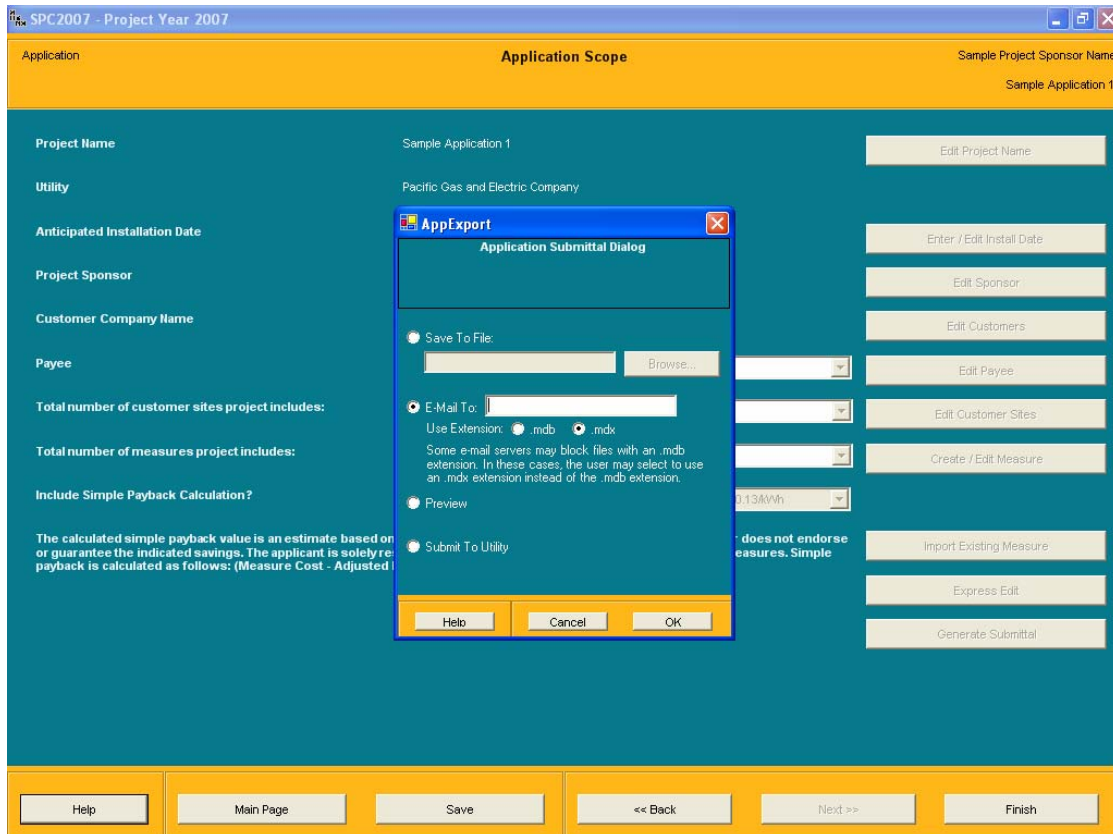


5.3.4 Exporting and Importing Application Databases

Project application databases can be exported to a file or to an email address using the *Generate Submittal – Save to File:* or *Email To:* functions. Simply select the *Generate Submittal* button and select one of these options. The *Save to File* option will create a Microsoft Access database file using the name of the application in a user specified location on your computer. The *Email To:* option will email this file to a user specified email address.

Some servers may block Microsoft Access database files with an *.mdb* extension. In these cases, the user may select to append the database file with an *.mdx* extension instead of the *.mdb* extension.

External application databases, such as the ones created by the *Generate Submittal – Save to File:* or *Email To:* functions, can be imported into your main database (*SPC2007.mdb*) by selecting the *Import* option via the *File* menu located on the Main Page. Once a database has been imported, it is integrated with the main database and all the associated Projects will be available from the *Select Project* screen.



5.3.5 Exporting and Importing Measure Information

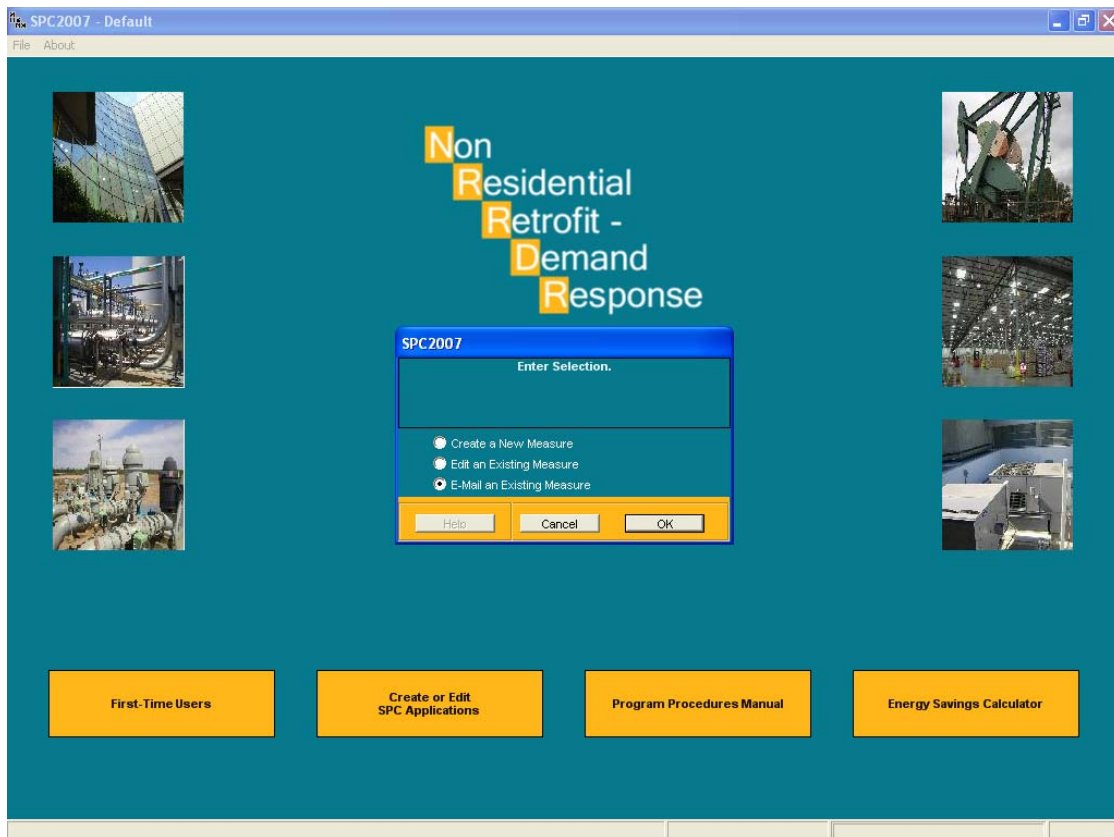
Measure data created with the Energy Savings Calculator can be emailed to another user utilizing the *Email an Existing Measure* function. Simply select the *Email an Existing Measure* option from the Energy Savings Calculator and then specify an email address.

Some servers may block Microsoft Access database files with an *.mdb* extension. In these cases, the user may select to append the database file with an *.mdx* extension instead of the *.mdb* extension.

Externally created measure data can be imported into your main database (*SPC2007.mdb*) by selecting the *Import* option via the *File* menu located on the Main Page. Once the data is loaded into your main database it can be imported into (attached to) an individual application. To perform this function create a new application or open an existing application. Proceed to the *Project Application - Application Scope* page. Select the *Import Existing Measure* button and follow the instructions to import

The measure export and import features are especially useful in situations where one party completes the technical measure information and another party fills out the non-technical application information. In these cases the measures information is completed by the first party (e.g. Energy Service Provider) and then emailed to the second party (e.g. Customer). The second party imports the measure data into their database and then imports the new measure (attaches it) to a newly created application.

The measure import feature can also be utilized to insert multiple copies of identical measures into one or more applications.



5.3.6 Exiting the Software

Exiting the software can be accomplished by:

- Clicking on the X button located at the top right corner of any NRR-DR (SPC) 2007 input screen;
- Selecting the *Exit* button located at the bottom right portion of the Main Page; or
- Selecting *Exit* under the *File* menu located at the top left corner of the Main Page.

Note that if you are viewing a submittal document, you must first exit the browser software used for report viewing (select X in top right corner) in order to return to an NRR-DR (SPC) 2007 input screen.

5.3.7 Data Entry Considerations

This section discusses basic data entry topics that are applicable to a variety of NRR-DR (SPC) 2007 input screens.

5.3.7.1 Pull-Down Menu Use

The software application provides for data entry either directly via the keyboard or by selecting items from a pull-down menu provided by the software. Information that is needed on a variety of screens, such as site name, customer name, etc., is initially entered directly (via the keyboard), but once entered will appear as either a pull-down menu item or will be automatically filled in on subsequent screens. Thus, repetitive entry of information via the keyboard is eliminated.

5.3.7.2 Locked Input Values

Any item displayed with a gray background is “locked” and may not be edited directly. In some cases, an edit button is provided to the right of the value in question that permits editing.

5.3.7.3 Invalid Input Values

The software checks for invalid data entries (invalid type or excessive length) and will fail to accept invalid entries.

5.3.7.4 Incomplete Data Entry

The software will issue a reminder if you attempt to leave a screen before completing all of the necessary fields. If this should occur, a warning window appears that itemizes the incomplete fields. You may choose to continue anyway, by selecting the Yes button on the warning window, or may return to the input form to complete the necessary fields by selecting the No button. Prior to calculating savings and incentive values, the software will again check for incomplete data entry and direct you to the measures with incomplete data.

5.3.7.6 Warning Messages

Throughout the program, warning messages alert you to potential problems. If a required field is left blank, a warning message will appear upon exit of a particular screen. In most cases you will be allowed to continue to the next screen by checking the NEXT button on the warning message.

Various NRR-DR rules have been programmed into the software. If your entry does not comply with one of these rules, a warning message will appear. Utility-specific rules have been programmed into the software. If a measure that is not supported by the particular Utility Administrator is selected, a warning message will appear.

5.4 Using the Software

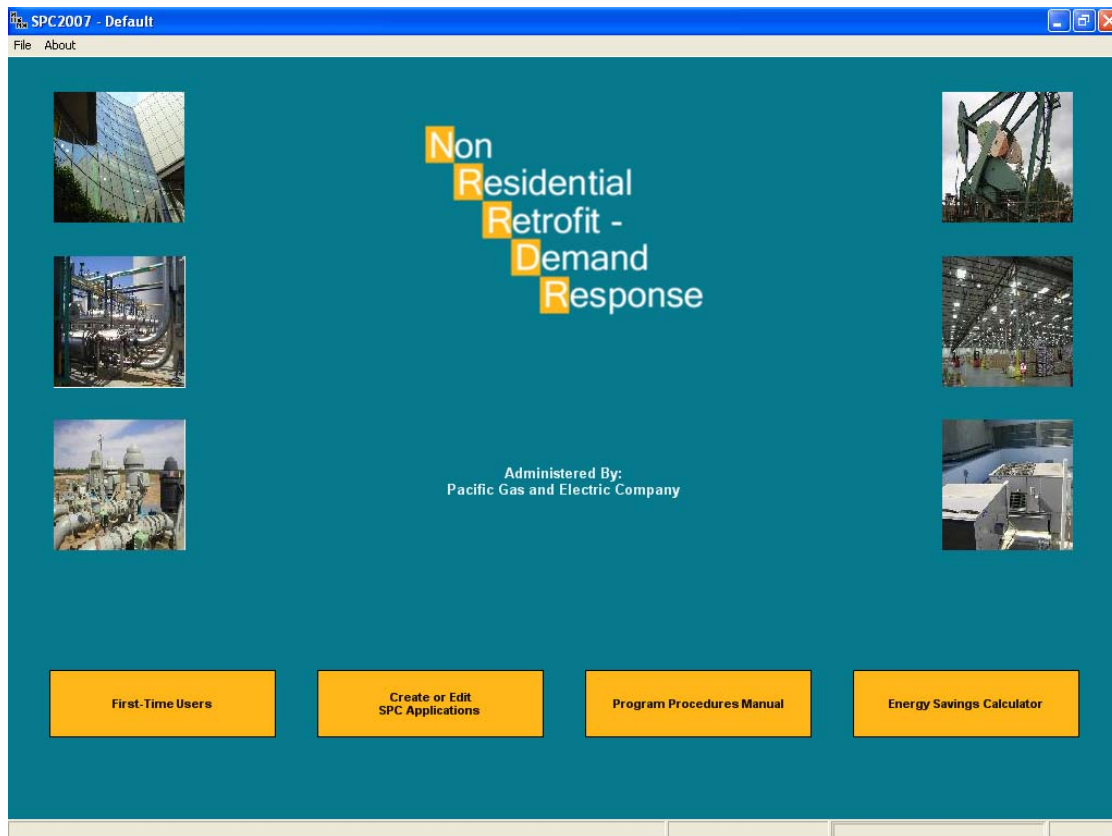
Immediately after NRR-DR (SPC) 2007 software launch a message dialog will appear asking the user to “select the Utility”. The availability of certain functions and the application of various rules may differ slightly between Utilities.

After the Utility has been selected the Main Page of the software is displayed.

There are four buttons on the Main Page:

- First-Time Users
- Create/Edit Applications
- Program Procedures Manual
- Energy Savings Calculator

Each of these functions is discussed below.



5.4.1 First-Time Users

The First-Time Users feature is intended as a quick guide for first-time users for the purpose of explaining the basic aspects of the software.

5.4.2 Create/Edit Applications

The *Create/Edit Application* button allows you to create a new NRR-DR submittal or edit an existing submittal—either the initial NRR-DR Application, the Installation Report, or the Operating Report. Please note that Installation and Operating Reports can be created for a Project only if that Project already has an Application in the database. This is because the subsequent reports are generated largely from information in the original Project Application. If you filled out your initial Application by hand, but would like to use the software to complete your subsequent reports, you will need to fill out an electronic version of the Project Application.

5.4.2.1 Establishing a Project

When you elect to create a new Application, successive screens ask you to:

- Enter a name for the Project
- Select an existing Project Sponsor or type in a new Project Sponsor

When you elect to edit an existing Project, you will be presented with a *Select Project* menu from which to choose the Project you want to work on.

Once the preliminary information is obtained from either of these two options, the *Select Submittal Level* screen will ask you to select the appropriate submittal level and the desired data entry method.

5.4.2.2 Submittal Level

Software input requirements are tied to the progressive Application and reporting processes described in Section 1 of the *NRR-DR Procedures Manual*. There are three levels of submittals required for the NRR-DR program:

1. **1st submittal: Application**, which contains the initial information for a specific project and enables the Utility Administrator to determine whether or not the prospective Project is eligible for program incentives.
2. **2nd submittal: Installation Report**, which describes the installed project and the projected energy savings. This is the final submittal for non-M&V projects.
3. **3rd submittal: Operating Report**, which documents the actual energy savings and any unforeseen changes in the Project. This report also includes the M&V results. This submittal is only required for Measured Savings Projects.

5.4.2.3 Data Entry Method

Three different data entry methods may be employed with the software. Note that selecting a data entry method does not immediately result in a change to the display since the input method is only relevant on subsequent input screens.

1. **Screen Edit.** In *Screen Edit* data entry mode, all of the possible input fields (and buttons) on an input screen are displayed and no input-specific prompting is provided. You are permitted to edit any unlocked field on the page and may proceed to any input screen in any sequence.
2. **Step-by-Step.** In *Step-by-Step* data entry mode, small data entry windows will sequence through all of the required inputs for a given screen and provide input-specific prompting that describes the necessary input. Note that canceling a *Step-by-Step* data input window (i.e., selecting back or the X button) will cause data entry on this specific screen to revert to the *Screen Edit* mode. Exiting the input screen and then returning will resume *Step-by-Step* data entry. You may elect to use *Express Edit* data entry whenever the *Step-by-Step* data entry method has been selected on the *Select Submittal Level* screen.¹ This method prompts you with data input windows for each successive input screen.
3. **Complete Application.** In *Complete Application* mode, the *Step-by-Step* input boxes described above will automatically sequence through successive input screens until all of the necessary inputs have been addressed. This process eliminates the need for the Project Sponsor to track which data types (i.e., Project Sponsor, Customer, etc.) have been entered and assists in systematic data entry. This is the same process as using the combined *Step-by-Step* method and *Express Edit* feature.

¹ The *Express Edit* button, located on the right side of the screen above the *View Application* button, will not be selectable unless *Step-by-Step* data entry has been specified on the *Select Submittal Level* screen and will be selected automatically if the *Complete Application* data entry approach is selected. The *Express Edit* feature forces you to enter each piece of information required for submittal.

Application **Select Submittal Level** Sample Project Sponsor Name
Sample Application 1

Choose the Submittal Level you Wish to Enter

Project Application

Installation Report

Operating Report

Selection of Data Entry Method

Complete Application

Step-by-Step

Screen Edit

Help Main Page Save << Back Next >> Finish

5.4.2.4 Completing the Project Application

The *Application Scope* screen features nine categories of information, represented by nine buttons on the right-hand side of the screen, which are necessary to complete the Application:

1. Edit Project Name
2. Enter / Edit Install Date
3. Edit Sponsor
4. Edit Customer
5. Edit Payee
6. Edit Customer Sites
7. Create / Edit Measure
8. Import Existing Measure
9. Express Edit
10. Generate Submittal

Application Scope

Project Name: Sample Application 1 [Edit Project Name]

Utility: Pacific Gas and Electric Company

Anticipated Installation Date: 1/1/2007 [Enter / Edit Install Date]

Project Sponsor: Sample Project Sponsor Name [Edit Sponsor]

Customer Company Name: ABC Manufacturing [Edit Customers]

Payee: Sponsor [Edit Payee]

Total number of customer sites project includes: 1 [Edit Customer Sites]

Total number of measures project includes: 1 [Create / Edit Measure]

Include Simple Payback Calculation? \$0.13\$/kWh [Import Existing Measure]

The calculated simple payback value is an estimate based on inputs provided by the applicant. The Utility Administrator does not endorse or guarantee the indicated savings. The applicant is solely responsible for the economic feasibility of the project and measures. Simple payback is calculated as follows: (Measure Cost - Adjusted Incentive) / (Annual kWh Savings * Utility Rate). [Express Edit]

[Generate Submittal]

Help Main Page Save << Back Next >> Finish

The Project Name category is entered and stored in the database when the *Create Application* button initiates the Project. The Utility category is entered when the software is first launched and remains unless the software is exited and re-started. The Anticipated Installation Date category is entered using a monthly calendar. These categories each contain a single piece of information.

The fourth category, Sponsor, may already be entered if you selected an existing Project Sponsor during the *Create Application* process. If an existing Project Sponsor was not selected, you will need to enter the Sponsor information through the *Edit Sponsor* button. You may also elect to edit an existing sponsor. The Sponsor category contains multiple pieces of information (Sponsor's Company Name, Sponsor's Federal Tax ID, Sponsor's Street Address, etc.).

The next five categories—Customer, Payee, Customer Sites, Create/Edit Measure, and Import Existing Measure—also contain multiple pieces of information.

The Payee category allows the user to select the existing Sponsor, Customer, or a third party. If a third party is selected the user must enter information regarding this business. Customers may also choose Credit Customer Account under the Payee category. This selection allows the Customer to credit their Utility account with the approved incentive.

A Project can only have one customer. Customer sites and measures may have multiple occurrences. The following conditions can exist:

- A Project can have one Customer
- A Customer can have multiple customer sites
- A customer site can have multiple measures

Before the screen associated with customer sites and measures can be accessed, a total number for each category must be determined and selected from *Total Number* lists. Each of these screens has a list of names as the first field to identify which particular Customer,

customer site, or measure is currently being displayed/edited. Initially the names are set to “1-unnamed”, “2-unnamed,” and so on (up to the total number entered for that category). After you enter a name for a particular customer site or measure, that name becomes the identifying parameter for that particular customer site or measure.

The customer site screen contains an additional link to the meter information, which is accessed through the *Edit Meter Data* button. A particular site can have one to four meters. Each measure will ask for an associated meter, and all such meters for a particular site must be entered.

The *Create / Edit Measure* button allows access to new or previously created measures within this application. Upon entering the Measure Summary Information screen the user identifies the measure name and associates the measure to a customer site and meter. The user then enters the appropriate measure category (AC&R, Lighting, Other, or Gas), the appropriate calculation method (Estimation Software or Engineering Calculations), and the installation type (Retrofit – Same Load, Retrofit – Increased Load, or New Install). Based on the combination of these three selections the user is presented with various applicable measure types.

The measure category selection establishes the incentive level for the Calculated Measures (see Section 1.0 Table 1-2). The Estimation Software tools utilize software models and equations to assist the user in the simple determination of energy savings. The Engineering Calculations allows the user to enter the resulting energy savings from their independent calculations.

The installation type covers measures involving equipment retrofits with the same or increased load or production. It also covers new construction projects where there is no existing equipment. Detailed information associated with the measure type and energy savings approach is entered on additional screens accessed through the *Edit Measure Details* button. Each individual measure screen contains the general information about that particular measure. Instructions regarding the entry of this information are included in Section 2 of this manual.

The Simple Payback feature allows the user to select whether or not simple payback calculations are included on the screens and reports. If simple payback is desired, the user marks the checkbox and then selects the appropriate estimated Utility rate. The calculated simple payback value is an estimate based on inputs provided by the applicant. The Utility Administrator does not endorse or guarantee the indicated savings. The applicant is solely responsible for the economic feasibility of the project and measures. Simple Payback is calculated as follows:

$(\text{Measure cost} - \text{Adjusted incentive}) / (\text{Annual energy savings} * \text{Estimated utility rate})$

The *Import Existing Measure* button allows the user to import (“attach”) measures that were created in other applications, in the energy savings calculator, or by another user into this application. The detailed information for these measures can be edited in the same manner as measures create within the application (i.e. with the Create / Edit Measure feature).

Initially, all measures do not require measurement and verification (M&V). During the review of the Application, the Utility Administrator may impose an M&V requirement. If a measure is required to use the M&V process, the Project Sponsor will be required to resubmit the Application and include an M&V plan. If an Application contains measures that require M&V and measures that don't, the Project Sponsor will be required to separate the measures and submit separate Applications. More information about estimating energy savings and incentives is covered in Section 2 of this Manual.

The *Generate Submittal* button is available in the Application, Installation Report, and Operating Report. The functions for this feature are described in section 5.4.2.7.

5.4.2.5 Completing the Installation Report

The Installation Report is submitted after the new equipment has been installed and is operational. This report describes the Project as installed and verifies the estimated energy savings. Any discrepancies from the Project Application are presented in this report.

The Installation Report screen contains ten information buttons:

1. Edit Project Name
2. Edit Project Number
3. Edit Sponsor
4. Enter / Edit Install Date
5. Edit Customer
6. Edit Customer Sites
7. Edit Verification Method
8. Edit Load Verification
9. View Incentive Calculation
10. Express Edit
11. Generate Submittal

Installation		Installation Report		Sample Project Sponsor Name	
				Sample Application 1	
Project Name	Sample Application 1	<input type="button" value="Edit Project Name"/>			
Project Number	07SPC-1111	<input type="button" value="Edit Project Number"/>			
Project Sponsor	Sample Project Sponsor Name	<input type="button" value="Edit Sponsor"/>			
Actual Installation Date	1/1/2007	<input type="button" value="Enter / Edit Install Date"/>			
Customer Company Name	ABC Manufacturing	<input type="button" value="Edit Customers"/>			
How many customer sites does this project include	<input type="text" value="1"/>	<input type="button" value="Edit Customer Sites"/>			
Verification	M&V not required	<input type="button" value="Edit Verification Method"/>			
Measure Load Verification	All Measures Not Verified	<input type="button" value="Edit Load Verification"/>			
Application Incentive Calculation	\$0.00	<input type="button" value="View Incentive Calculation"/>			
<input type="button" value="Express Edit"/>					
<input type="button" value="Generate Submittal"/>					

Help Main Page Save << Back Next >> Finish

The *Edit Project Name*, *Edit Sponsor*, *Enter / Edit Install Date*, *Edit Customer*, and *Edit Customer Site* buttons allow you to edit any of the information previously entered in the Project Application. If a Customer, customer site, or measure is deleted, a pop-up box will appear asking you to select the element you wish to remove. All data associated with that element (Customer, measure, etc.) will be automatically removed from the database.

Once the NRR-DR Application has been approved, the Utility Administrator will assign a Project number, which will be included in the Project approval letter. Enter this number in the Installation Report through the *Edit Project Number* button. Furthermore, as discussed in Section 1.7, the Utility Administrator will determine if the Project needs to be performed using the M&V process. If it is established that your Project must use this process please select *Edit Verification Method* and choose M&V Required.

The *Edit Load Verification* button is used to verify the energy savings estimated in the Project Application. If the energy savings estimate has changed, you will need to edit the measure through the *Edit Measure Parameters* button located on the *Measure Summary Information* screen. After the loads have been verified and any necessary changes to the energy savings estimates have been entered, check the *Measure Energy Savings Verification* box for each measure.

The *View Incentive Calculation* screen allows you to view the current incentive calculations. The top half of the screen shows energy savings by measure. These parameters include kWh savings, rate, and usage incentive. The bottom half of the screen shows the Energy Savings Incentive, the Adjusted Energy Savings Incentive and the Total Incentive for the entire Project.

The *Generate Submittal* button is available in the Application, Installation Report, and Operating Report. The functions for this feature are described in section 5.4.2.7.

5.4.2.6 Completing the Operating Report

This third and final submittal, required only for Projects using the M&V process, is due one year after the Installation Report is submitted. The Operating Report describes the Project as it has been operated over the one-year period. Any discrepancies from the Installation Report estimates are presented in this report. Like the Installation Report, the Operating Report screen contains eight edit buttons:

1. Edit Project Name
2. Edit Project Number
3. Edit Sponsor
4. Edit Customer
5. Edit Customer Sites
6. Edit Load Verification
7. View Incentive Summary
8. Generate Submittal

The *Edit Project Name*, *Edit Project Number*, *Edit Sponsor*, *Edit Customer*, and *Edit Customer Site* buttons allow you to edit any of the information previously entered on the Application or Installation Report.

The *Edit Load Verification* button is used to enter the actual energy savings as realized by the Project. This amount is entered into the *Actual Energy Savings (kWh)* field. If the energy savings estimate has changed based on operational changes, you will need to edit the measure through the *Edit Measure Parameters* button located on the *Measure Summary Information* page.

The *View Incentive Summary* screen allows you to view the final incentive calculations. The top half of the screen shows energy savings by measure. These parameters include incentive rate, revised kWh savings, and incentive earned. The bottom half of the screen shows the Energy Savings Incentive, the Adjusted Energy Savings Incentive, and the Total Incentive for the entire Project.

The *Generate Submittal* button is available in the Application, Installation Report, and Operating Report. The functions for this feature are described in section 5.4.2.7.

5.4.2.7 Generate Submittal

The *Generate Submittal* process guides you through the necessary steps to create the submittal document for the Utility Administrator, to preview the submittal, to email the submittal to another party or, to save the submittal as a file. This feature is initiated only after all the necessary data fields for the NRR-DR Application, Installation Report, or Operating Report have been completed. Selecting this button presents the user with four options:

1. Save To File
2. Email To
3. Preview
4. Submit To Utility

The *Save To File* option allows the user to save the application/report submittal to a Microsoft Access file in a user selected area on the computer. The user defines the file name and then uses the browse button to determine where the file is stored (i.e. hard drive, floppy disk, cd, etc.).

The *Email To* option allows the user to send the application/report submittal to another user via email. In this option the Microsoft Access file (project name.mdb) is sent to a user specified email address.

Some servers may block Microsoft Access database files with an *.mdb* extension. In these cases, the user may select to append the database file with an *.mdx* extension instead of the *.mdb* extension.

The *Preview* option displays the current submittal. The submittal can be printed or saved in HTML format from this software.

The *Submit To Utility* option sends an electronic copy of the application/report to the appropriate Utility Administrator. **This version is used for pre-processing only. A signed hard copy original must be delivered to the Utility Administrator prior to application acceptance.**

When submitting documentation to the Utility Administrator, the Project Sponsor must:

- Print, sign, and mail three copies of the submittal document
- Supply any supporting documentation (i.e., manufacturer's data, M&V plan, etc.)

During the initial Application submittal process, the software will create the Customer Affidavit (one for each customer), that must be signed by the customer(s) prior to submittal.

5.4.3 NRR-DR Program Procedures Manual

This button on the Main Page allows electronic access to California's *2007 NRR-DR Program Procedures Manual*. The manual is divided into the following sections:

- Section 1: Non-Residential Retrofit Program Overview and Policies
- Section 2: Demand Response Program Overview and Policies
- Section 3: Estimating Energy Savings and Incentives
- Section 4: Forms and Instructions
- Section 5: Software Instructions (this document)
- Index
- Appendices

Each of these PDF files can be downloaded and printed.

5.4.4 Energy Savings Calculator

The Energy Savings Calculator provides easy access to the energy savings estimating tools contained within the software. This feature serves two purposes:

- It allows applicants who prefer the manual forms to use the software tools to estimate energy savings. A simple report for each measure can be viewed, printed, and attached to the manual forms for submittal to the Utility Administrator.
- It allows the user to perform “what-if” analyses to estimate energy savings and incentives for a prospective measure. The completed estimations may be saved as either a measure for later use or as the initiation of a new Project.

When you click the Energy Savings Calculator button on the Main Page, successive text boxes are displayed requesting the following information:

- Create a New Measure, Edit an Existing Measure, or Email an Existing Measure
- Select Measure Category, Calculation Method, Installation Type, and Measure Type

After these parameters have been determined the software presents the appropriate *Measure Information* screen. Details on entering data for particular measures are located in Section 2, *Estimating Energy Savings*.

When you have finished entering the measure information, a dialog box asks if you would like to view the report. Select “Yes” to display the report in Adobe Acrobat, which will allow you to print out the Energy Savings Sheet.

A subsequent dialog box asks whether or not the user would like to continue working on the measure. Select “Yes” to adjust the inputs or “No” to exit the estimator.

A final dialog box asks if the user would like to save the measure. If the user selects “Yes” then the user must choose whether the measure is saved as a calculator or as a new Project. If the user saves the measure as a calculator then it can be recalled at a later time for more analysis using the Energy Savings Calculator. If the user saves the measure as a new Project then the user can choose Edit Project – Existing Projects to complete the Application. If the user does not elect to save the measure then it will not be committed to the database.

If the user selects “Edit an Existing Measure” the measure may be converted into a Project by selecting Make New Project button.

For assistance with software problems or questions please contact:

PG&E – (800) 468-4743 or energymgmtprograms@pge.com