

# **Pre BEETS (IS2.0) Data Load into BEETS User Guide**

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Last Updated 4/11/23

\*There may be changes to what this looks like in BEETS.  
If you have any questions reach out to your EER.

# How to Identify IS2.0 Data in BEETS

IS2.0 Data in BEETS Applications

# Utility and Program Management

First navigate to your utility (here Bonneville Expedition example) and to the program you are looking for (here Custom Projects Option 2 example)  
On the next few slides we will look at the fields that are highlighted here

**PROGRAM** Custom Projects Option 2

Utility: Bonneville Expedition | Code: C2 | ID: 3844 | Number: 16607F57BC0B4D798A78CD53326D5F5C | Start: Sep 30, 2021, 9:00 PM | End: Sep 29, 2022, 9:00 PM | Hostname: -

Navigation: Snapshot | Goals | Budgets | Workflow | Forms | Files | **Applications** | Payments

### Applications

[Create New Application](#) [Export CSV](#)

PROJECT #	CREATED	STATUS	PROJECT NAME	IMPORT DATE	EDITED	USER	APP REF ID	ENTRY POINT	
XTC2CR1552461521	Jul 5, 2015, 9:00 PM	Application Compl...	Lighting Upgrade	Feb 6, 2023, 12:19 PM	Feb 6, 2023, 12:19 PM	SYSTEM	B0EC0BA9-A413-E5...	Imported	1
XTC2CR1552461518	Jul 5, 2015, 9:00 PM	Application Compl...	Lighting Upgrade	Feb 6, 2023, 12:19 PM	Feb 6, 2023, 12:19 PM	SYSTEM	59157D90-A413-E5...	Imported	2
XTC2CR1552461516	Jul 5, 2017, 9:00 PM	Application Compl...	Tennis Court LED Li...	Feb 6, 2023, 12:19 PM	Feb 6, 2023, 12:19 PM	SYSTEM	FD8FFA30-F04A-E7...	Imported	3
XTC2CR1552461513	Dec 14, 2013, 9:00 PM	Application Compl...	U of O Physical Plant	Feb 6, 2023, 12:19 PM	Feb 6, 2023, 12:19 PM	SYSTEM	B0B76DDC-DD90-E...	Imported	4
XTC2CR1552461510	Dec 14, 2013, 9:00 PM	Application Compl...	Country Inn Kennels	Feb 6, 2023, 12:19 PM	Feb 6, 2023, 12:19 PM	SYSTEM	590E66CA-DD90-E2...	Imported	5
XTC2CR1552461506	Dec 14, 2013, 9:00 PM	Application Compl...	LED Lighting Upgrade	Feb 6, 2023, 12:19 PM	Feb 6, 2023, 12:19 PM	SYSTEM	FD2E4A5B-2A22-E3...	Imported	6
XTC2CR1552461503	Sep 1, 2016, 9:00 PM	Application Compl...	Lighting Upgrade	Feb 6, 2023, 12:19 PM	Feb 6, 2023, 12:19 PM	SYSTEM	B088600F-1A55-E6...	Imported	7
XTC2CR1552461499	Dec 14, 2013, 9:00 PM	Application Compl...	Small Biz Lighting	Feb 6, 2023, 12:19 PM	Feb 6, 2023, 12:19 PM	SYSTEM	58B18D2B-F43B-E3...	Imported	8
XTC2CR1552460174	Dec 14, 2013, 9:00 PM	Application Compl...	LED PAR 30 Lamp R...	Feb 6, 2023, 12:06 PM	Feb 6, 2023, 12:06 PM	SYSTEM	FED58E5E-C61F-E3...	Imported	9
XTC2CR1552460172	Jul 22, 2014, 9:00 PM	Application Compl...	Retrofit Lighting Re...	Feb 6, 2023, 12:06 PM	Feb 6, 2023, 12:06 PM	SYSTEM	B1D5867E-E7FA-E3...	Imported	10

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Note here that when data from IS2.0 is loaded into BEETS it will result in many more applications and pages than you are used to seeing in BEETS.

# Created Date

- The **Created date** is the same as the “**Received**” date within the application and is the date that data was copied from IS2.0 to the internal BPA database.
- This date is therefore a good indicator of which applications are from IS2.0. This one is from July 2015 which is pre BEETS.
- If you sort this way in descending order then BEETS data will typically show up on the top and IS2.0 data on the bottom.
- **We recommend you use this field to sort applications**

<b>APPLICATION #XTC2CR1552460196</b>		Status: Application Completed	
Status Updated: Feb 6, 2023, 12:06 PM	Last Edited: Feb 6, 2023, 12:06 PM	Received: Jul 5, 2015, 9:00 PM	
Project Name LED Lighting Upgrade	App ID 3340E4DAD48743228E39AB528275F491	Customer	Utility Bonnevill

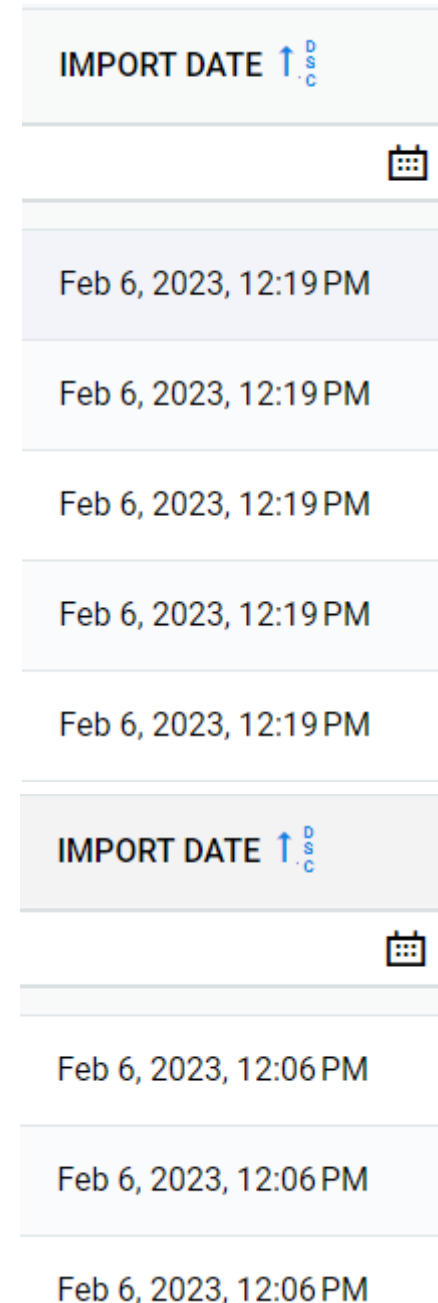
## Applications

PROJECT #	CREATED	STATUS	PROJECT NAME	IMPORT DATE	EDITED	USER
XTC2CR1552460196	Jul 5, 2015, 9:00 P...	Application Com...	LED Lighting Upgrade	Feb 6, 2023, 12:06 PM	Feb 6, 2023, 12:...	SYSTEM

# Import Date

- The **Import date** is the date that the IS2.0 data is loaded into BEETS. If you use this to sort your applications then when the load occurs your BEETS data will be pushed to later pages.
- This date shows up in each application as **Status Updated** and **Last Edited**.
- **We do not recommend you sort on this column, but if you are having trouble finding your data submitted in BEETS look at your filters and this might be why.**

Status Updated: Feb 6, 2023, 12:06 PM      Last Edited: Feb 6, 2023, 12:06 PM



IMPORT DATE ↑ <small>D S C</small>
Feb 6, 2023, 12:19 PM
Feb 6, 2023, 12:19 PM
Feb 6, 2023, 12:19 PM
Feb 6, 2023, 12:19 PM
Feb 6, 2023, 12:19 PM
IMPORT DATE ↑ <small>D S C</small>
Feb 6, 2023, 12:06 PM
Feb 6, 2023, 12:06 PM
Feb 6, 2023, 12:06 PM

# In an Application

To find out whether an application is data from IS2.0 or BEETS follow these steps

1. Within the application go to forms
2. Scroll to the right until you find the Admin form
3. Within the admin form find the Data Source and historic\_data fields

We will discuss these in detail on the next slide.

Note: The symbol below shows up on the historic\_data field but we have confirmed that customers CAN see this field.



Highlighted fields marked with are administrative and are not shown to all users.

APPLICATION #XTC2CR1552460196 | Status: Application Completed

Status Updated: Feb 6, 2023, 12:06 PM | Last Edited: Feb 6, 2023, 12:06 PM | Received: Jul 5, 2015, 9:00 PM | Entry Point: Imported | Entered By: SYSTEM

Project Name: LED Lighting Upgrade | App ID: 3340E4DAD48743228E39AB528275F491 | Customer: Bonneville Expedition | Utility: Bonneville Expedition | Program: Custom Projects Option 2 | Ref ID: B23BFEA2-A413-E511-

Flags (2)  Lock Application  Freeze Calculations | Tags (0)

Workflow | **1. Forms** | Notes | Equipment | Documents | Payments | Contacts

### Forms

< OVERSIGHT REVIEW | PROJECT SUMMARY | FUNDING DETERMINATION | **2. ADMIN** | CORRECTION APPLICATION - INCENTIVE CORRECTION

Highlighted fields marked with are administrative and are not shown to all users.

### Admin

Admin

PNGC\_Utility

No

Data Source

IS2.0

ETL Date

07/06/2015

historic\_data ("Yes" if from IS2.0, blank if from BEETS)

Yes

## Admin

PNGC\_Utility

No

Data Source

IS2.0

ETL Date

07/06/2015

historic\_data ("Yes" if from IS2.0, blank if from BEETS)

Yes

# In an Application

The main way to distinguish IS2.0 data from BEETS data is with the Data Source and historic\_data fields. These are located in the Forms > Admin

**IS2.0 Data** has:  
Data Source: IS2.0  
historic\_data: Yes

Admin

PNGC\_Utility

No

Data Source  
IS2.0

ETL Date

07/06/2015

historic\_data ("Yes" if from IS2.0, blank if from BEETS)  
Yes

Note: You may see PTR show up for Data Source. This is pre IS2.0 data and is also considered pre BEETS data and will have historic\_data "Yes" as well

**BEETS Data** has:  
Data Source: BEETS  
Historic\_data: BLANK

Admin

PNGC\_Utility

No

Data Source  
BEETS

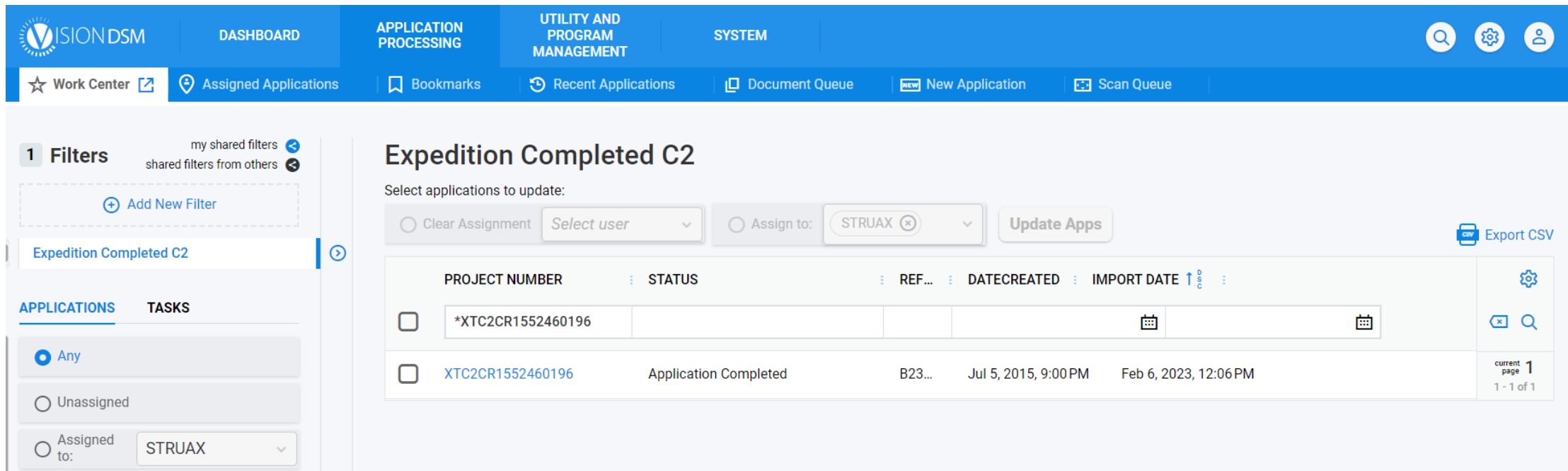
ETL Date

historic\_data ("Yes" if this project is historic)

# Work Center

IS2.0 Data will show up in Work Center with filters that contain “Application Completed.”

The best way to try and identify IS2.0 data here is with **DATECREATED** and **IMPORT DATE** which match with the Created and Import dates talked about in the previous slides.



The screenshot shows the VISION DSM Work Center interface. The top navigation bar includes 'VISION DSM', 'DASHBOARD', 'APPLICATION PROCESSING', 'UTILITY AND PROGRAM MANAGEMENT', and 'SYSTEM'. Below this is a secondary navigation bar with 'Work Center', 'Assigned Applications', 'Bookmarks', 'Recent Applications', 'Document Queue', 'New Application', and 'Scan Queue'. On the left, a 'Filters' sidebar shows 'my shared filters' and 'shared filters from others', with an 'Add New Filter' button. The main content area is titled 'Expedition Completed C2' and includes a 'Select applications to update:' section with 'Clear Assignment', 'Assign to: STRUAX', and 'Update Apps' buttons. Below this is a table with columns: PROJECT NUMBER, STATUS, REF..., DATECREATED, and IMPORT DATE. The table contains one row with project number XTC2CR1552460196 and status 'Application Completed'. The bottom right corner shows 'current page 1' and '1 - 1 of 1'.

PROJECT NUMBER	STATUS	REF...	DATECREATED	IMPORT DATE
*XTC2CR1552460196				
XTC2CR1552460196	Application Completed	B23...	Jul 5, 2015, 9:00 PM	Feb 6, 2023, 12:06 PM



In the Activity Report we have added a required drop down field called **Data Source**. Options below will only show up where applicable. Therefore only utilities with IS2.0 data loaded will see the option IS2.0

- Use **(Select All)** if you would like all data to appear
- Use **<Null>** if you are looking for Performance Payment Program BEETS Applications
  - Note this will only show up if you have that program selected
- Select **BEETS** if you are looking for data submitted to BEETS
- Use **IS2.0** if you are only looking for data submitted to IS2.0
  - Note, eventually there will be another option, PTR for Pre IS2.0 data

Depending on the application create date you may or may not see historic data show up. The Activity report is using the Created Date which is the same as the Received date at the top of an application. To see this data, you will likely have to expand your date range to around the time you submitted the data into IS2.0

Application Created From Date:	<input type="text" value="1/1/2011"/>		Application Created To Date:	<input type="text" value="2/24/2023"/>	
Invoice Approved From Date:	<input type="text"/>	<input checked="" type="checkbox"/> NULL	Invoice Approved To Date:	<input type="text"/>	<input checked="" type="checkbox"/> NULL
Invoice Paid From Date:	<input type="text"/>	<input checked="" type="checkbox"/> NULL	Invoice Paid To Date:	<input type="text"/>	<input checked="" type="checkbox"/> NULL
Completion From Date:	<input type="text"/>	<input checked="" type="checkbox"/> NULL	Completion To Date:	<input type="text"/>	<input checked="" type="checkbox"/> NULL
Utility	<input type="text" value="Bonneville Expedition"/>		General Program	<input type="text" value="BPA Managed Programs, Custom Prc"/>	
Utility-Specific Program	<input type="text" value="Bonneville Expedition: BPA Managed"/>		Status:	<input type="text" value="Address Not Validated, Admin Hold,"/>	
Sector	<input type="text" value="&lt;Null&gt;, Agricultural, Commercial, In"/>		Data Source	<input type="text"/>	

- (Select All)
- <Null>
- BEETS
- IS2.0

# Additional Notes

- Pre BEETS data (IS2.0) will NOT show up in the dashboards
- Pre BEETS data (IS2.0) will always be in either status “Application Completed” or status “Engagement Sunset” if in the EPM or SEM programs
- Pre BEETS data (IS2.0) will show up in the Activity Report with the correct filters selected
- Pre BEETS data (IS2.0) will show up in Work Center
- If you see [1C], [2C], or [3C] before a Project Name, application refID, or equipment refID this means it is a correction project
- Pre BEETS data (IS2.0) is locked and calculations are frozen
  - These will show up on applications that are IS2.0 data

Flags (2)

Lock Application

Freeze Calculations