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

Last Updated 4/11/23

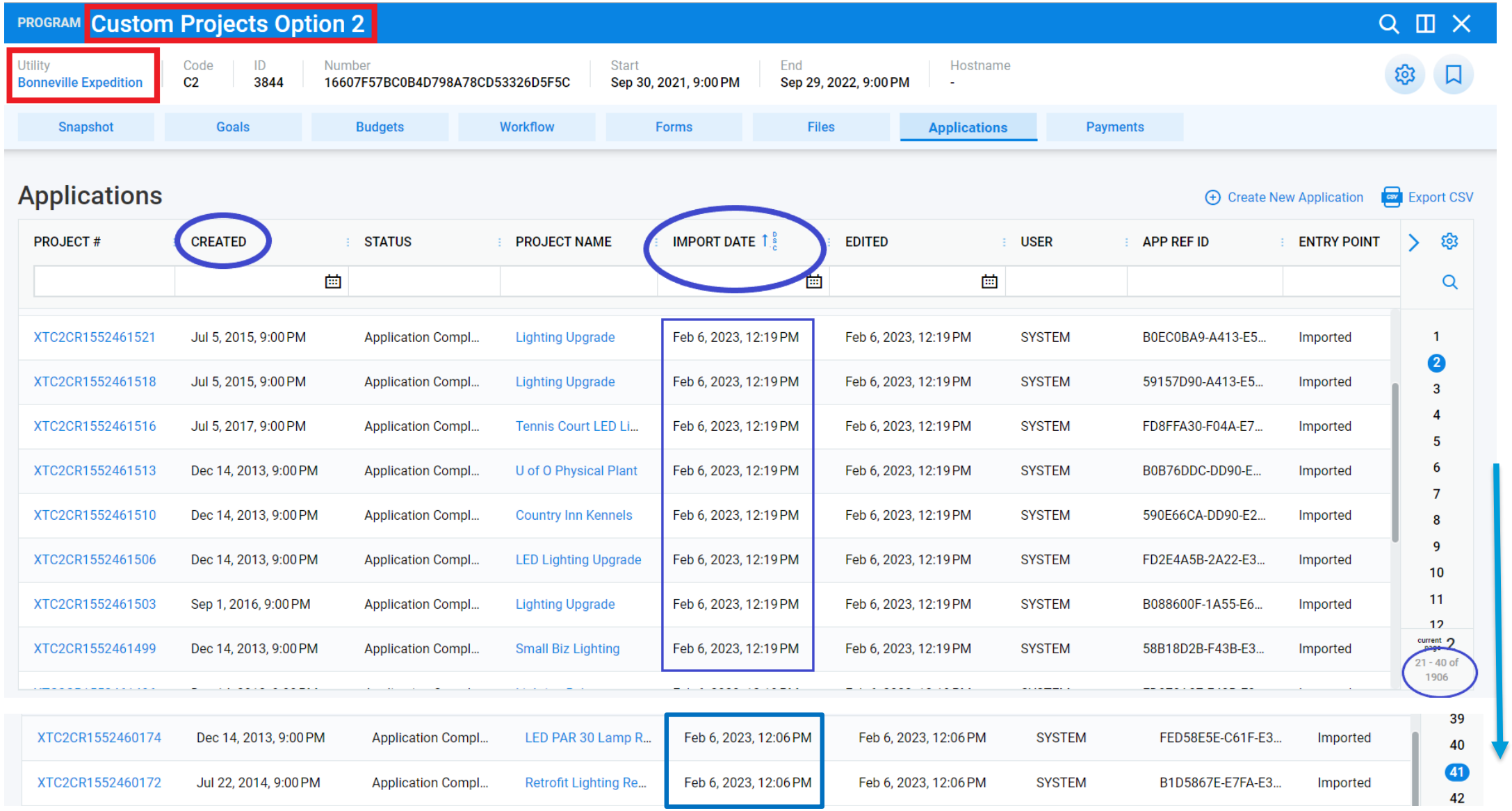
*There may be changes to what this looks like in BEETS.
If you have any questions reach out to your EER.

How to Identify IS2.0 Data in BEETS

IS2.0 Data in BEETS Applications

Utility and Program Management

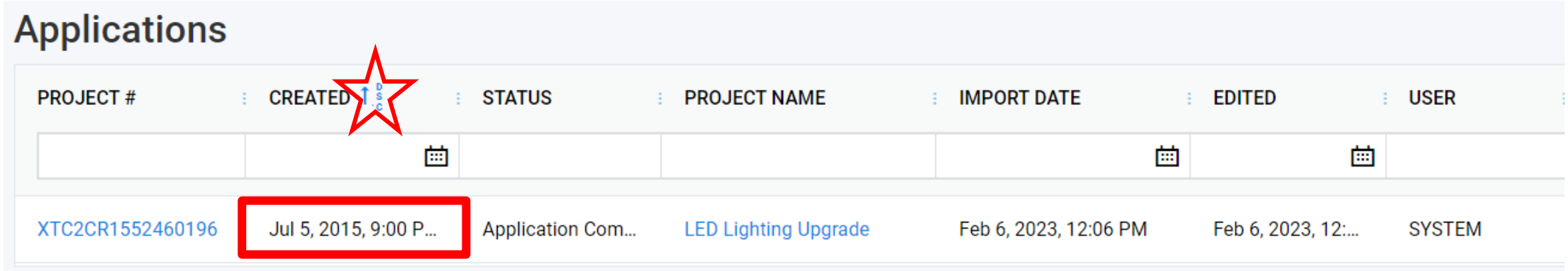
First navigate to your utility (here Bonneville Expedition example) and to the program you are looking for (here Custom Projects Option 2 example)
On the next few slides we will look at the fields that are highlighted here



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.

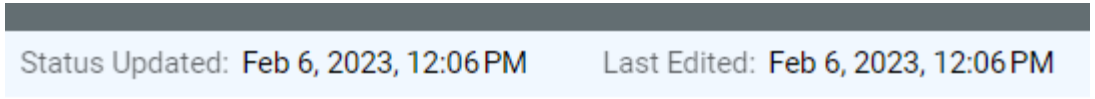
Created Date

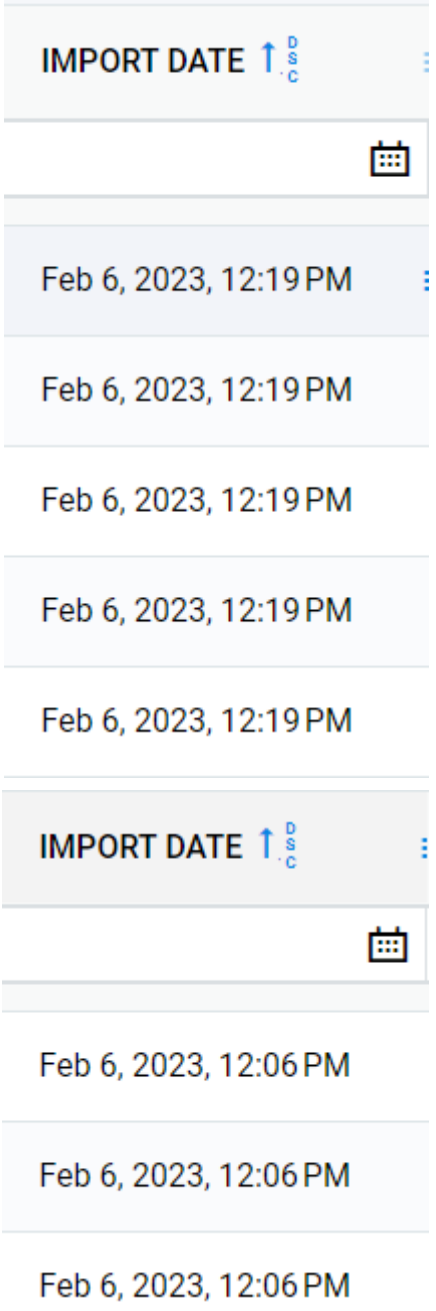
- The Created date is the same as the "Received" date within the application and is the date that data was copied from IS2.0 to the internal BPA database.
- This date is therefore a good indicator of which applications are from IS2.0. This one is from July 2015 which is pre BEETS.
- If you sort this 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



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.





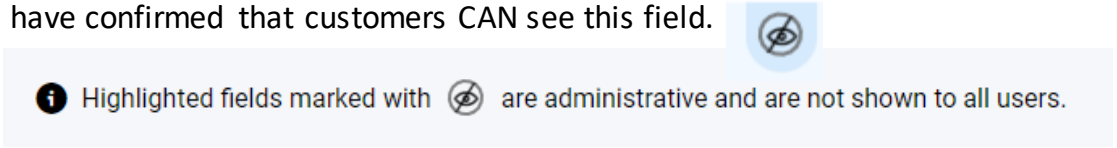
In an Application

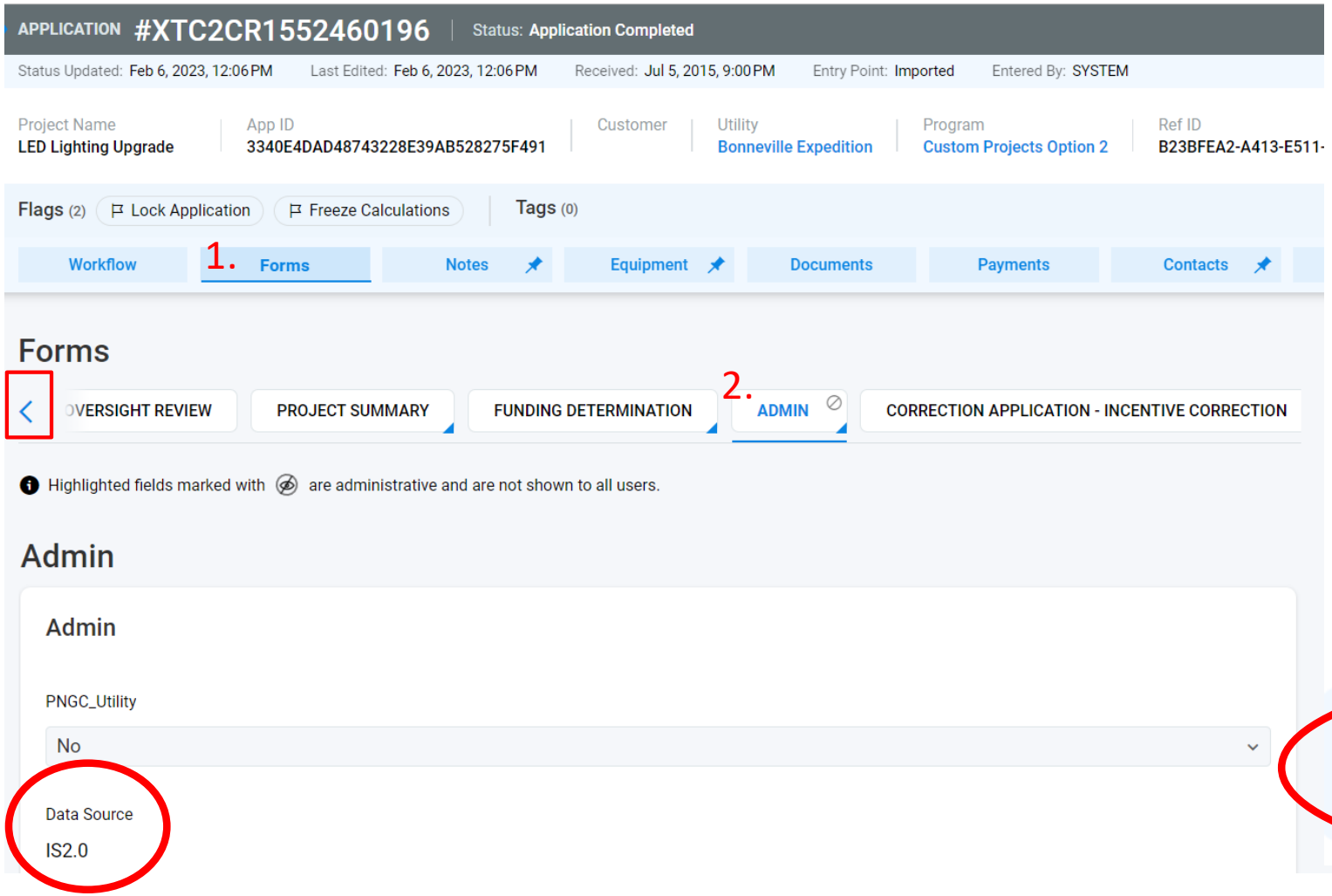
To find out whether an application is data from IS2.0 or BEETS follow these steps

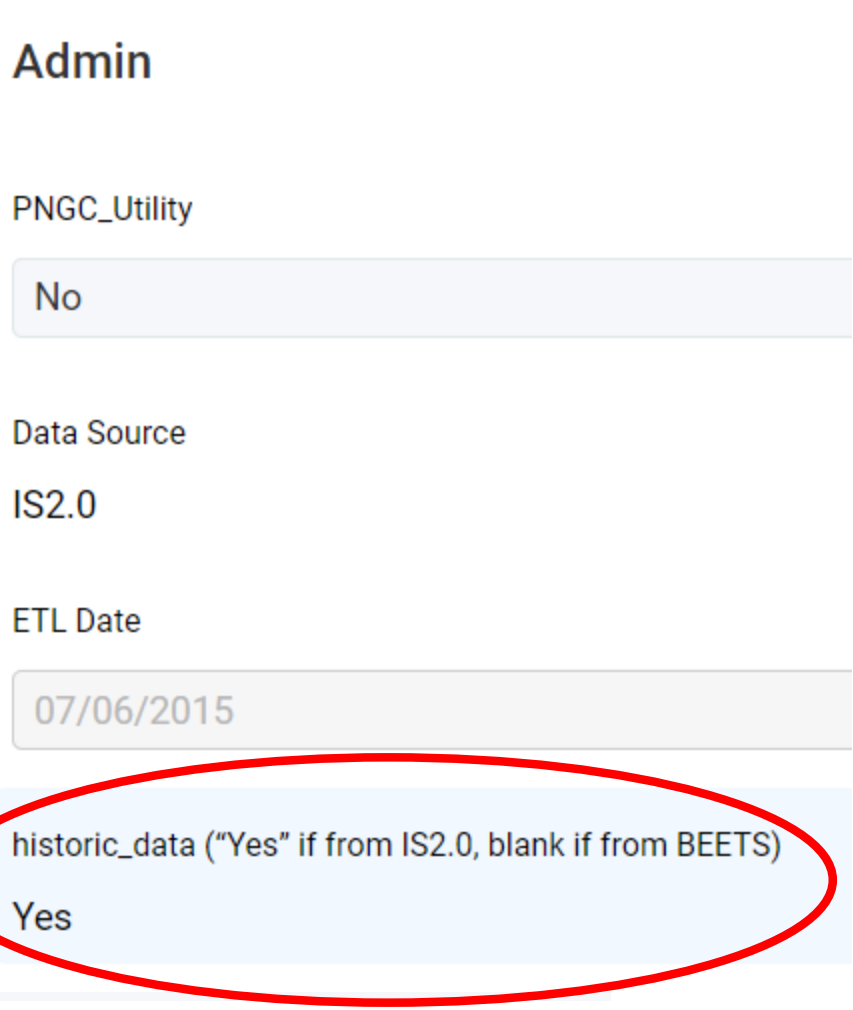
1. Within the application go to forms
2. Scroll to the right until you find the Admin form
3. Within the admin form find the Data Source and historic_data fields

   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.



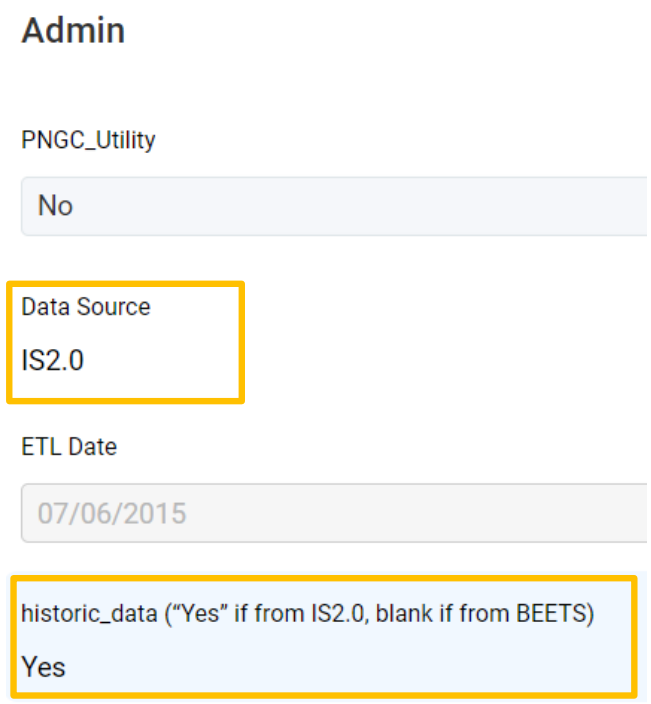




In an Application

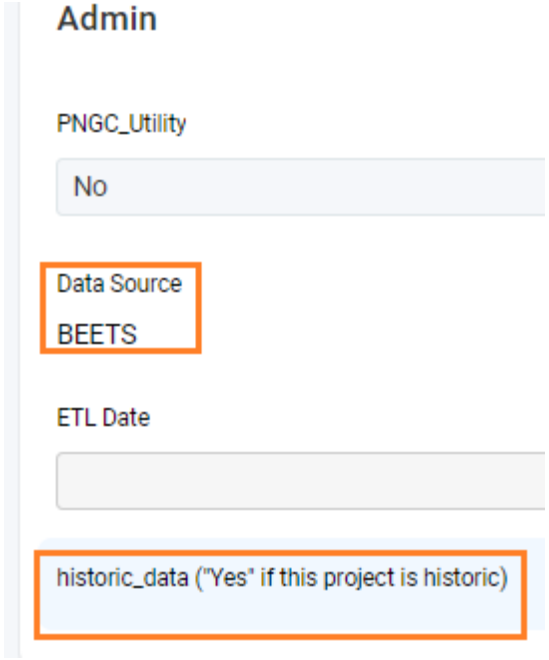
The main way to distinguish IS2.0 data from BEETS data is with the Data Source and historic_data fields. These are located in the Forms > Admin

IS2.0 Data has:
Data Source: IS2.0
historic_data: Yes



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

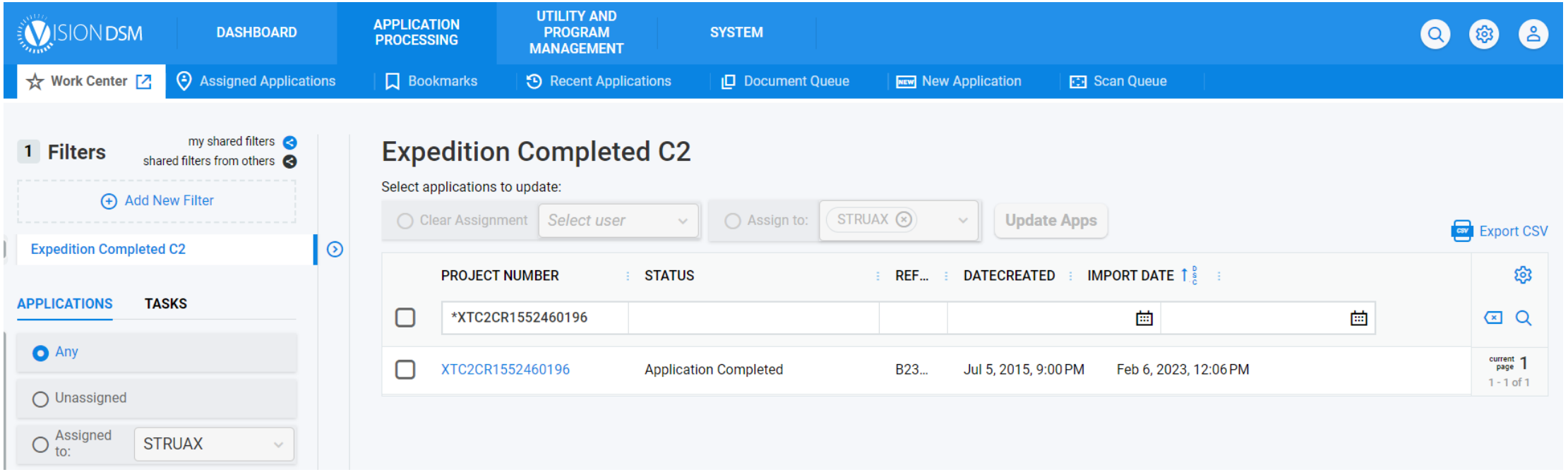
BEETS Data has:
Data Source: BEETS
Historic_data: BLANK



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.

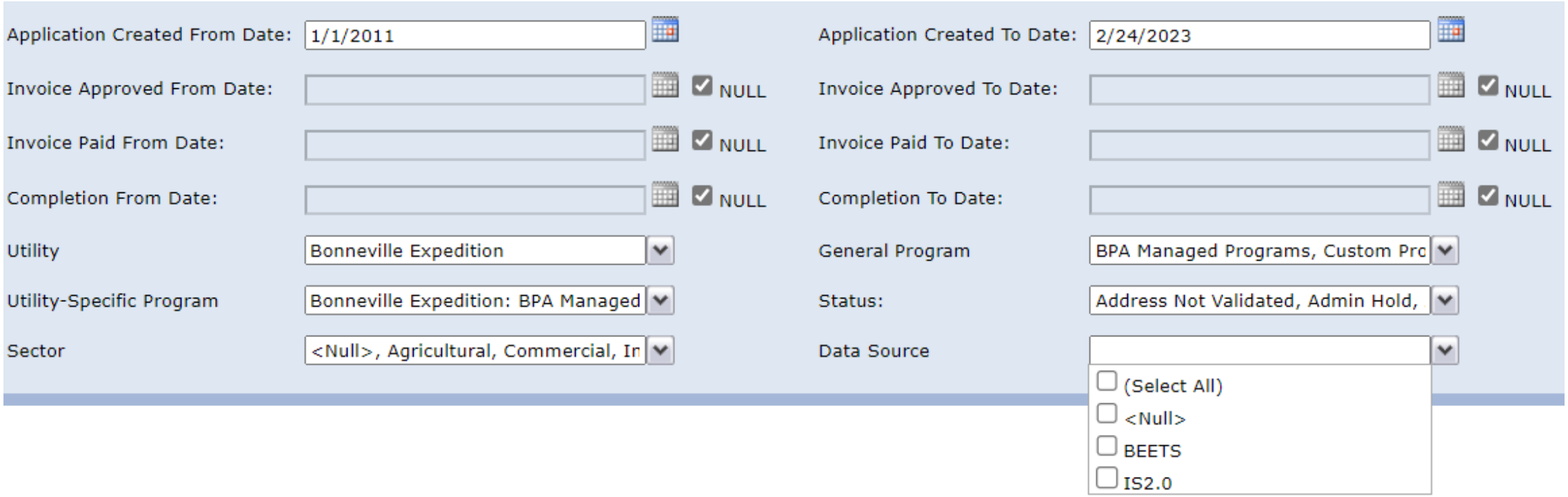


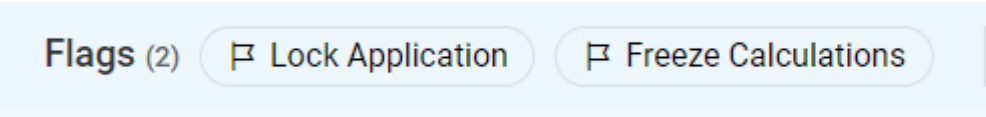
SSRS

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



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