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

Last Updated 3/3/23

*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

BEETS
BPA Energy Efficiency Tracking System

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 -

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 3
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	4 5
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	6 7
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	8
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	9 10
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	11 12
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	current page 2
									21 - 40 of 1906
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	39 40
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	㊶ 42

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 <u>descending order</u> 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

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**

Project Name	App ID	Customer	Utility
LED Lighting Upgrade	3340E4DAD48743228E39AB528275F491		Bonnevill
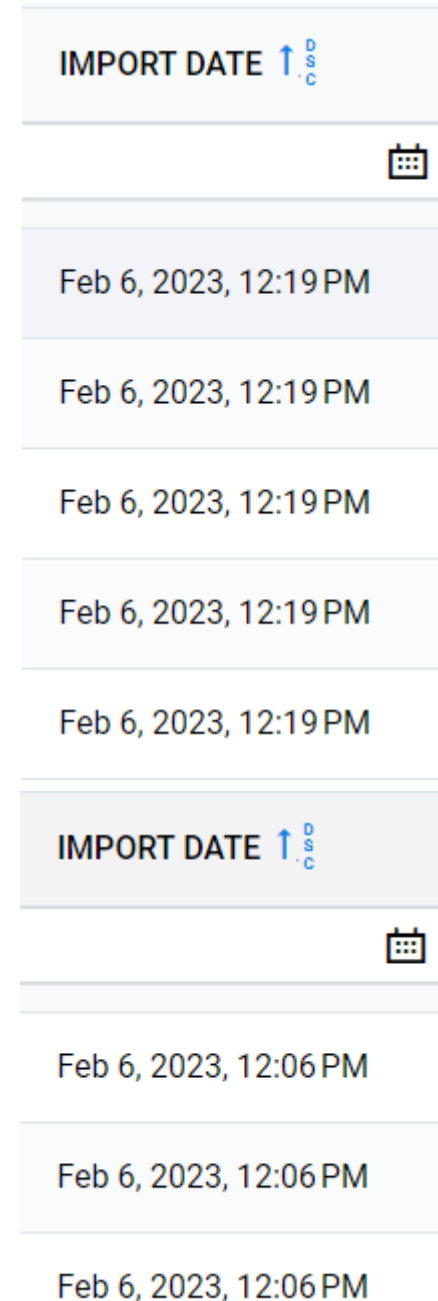
Applications

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

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

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.

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

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

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.

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

Application Created From Date:	1/1/2011	Application Created To Date:	2/24/2023
Invoice Approved From Date:	☑ NULL	Invoice Approved To Date:	☑ NULL
Invoice Paid From Date:	☑ NULL	Invoice Paid To Date:	☑ NULL
Completion From Date:	☑ NULL	Completion To Date:	☑ NULL
Utility	Bonneville Expedition	General Program	BPA Managed Programs, Custom Pro
Utility-Specific Program	Bonneville Expedition: BPA Managed	Status:	Address Not Validated, Admin Hold,
Sector	<Null>, Agricultural, Commercial, In	Data Source	

☐ (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 "Application Completed" Status

- 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