

# Energy Efficiency Measure Database (EEM) User Guide

Version 3.0 2017

ISO New England Inc.



## About this user guide

The Energy Efficiency Measure Database User Guide is grouped into independent sections arranged by topic and user role. This guide details the EEM Database user interface for Lead Participants to create, view and edit their energy efficiency measure information. It is not necessary to read the guide from beginning to end.

You may:

- Select a topic from the <u>How to:</u> list on page 8.
- Start with an <u>Overview</u> on page 9.
- Select a <u>Relevant EEM Role</u> from the list on page 65.



#### CAUTION

- Though we strive to maintain this document, the screen shots in this guide may not fully reflect the current production environment.
- Do not rely only on this user guide for information or requirements regarding demand resources and demand assets registration or market participation as the Market Rule and Manuals serve that function.
- Please consult:
  - the ISO New England Inc. Transmission, Markets and Services Tariff ("Tariff") at:
    - https://www.iso-ne.com/participate/rules-procedures/tariff:
      - Section I General Terms and Conditions
      - Section I.2.2 Definitions
      - Section III Market Rule 1
      - Section III.13 Forward Capacity Market
  - the relevant ISO New England Manuals at:
    - https://www.iso-ne.com/participate/rules-procedures/manuals
      - M-RPA Registration and Performance Auditing
      - M-MVDR Measurement and Verification of Demand Reduction Value from Demand Resources
      - M-20 Forward Capacity Market (FCM)
      - M-28 Market Rule 1 Accounting
  - ISO New England Operating Procedures at:

https://www.iso-ne.com/participate/rules-procedures/operating-procedures

- ISO New England Planning Procedures at: <u>https://www.iso-ne.com/participate/rules-procedures/planning-procedures</u>
- ISO New England training materials at: https://www.iso-ne.com/participate/training

# **Change Summary**

| Revision    | Date              | Comments   |
|-------------|-------------------|--|
| Version 1.0 | January 14, 2015  | Initial release  |
| Version 2.0 | February 24, 2015 | Updates to reflect first release to production<br>environment  |
| Version 3.0 | June 1, 2017      | Updates including CSV Upload capability and requirement that EEM is source of record for monthly reporting |

# **Table of Contents**

| 1 | Ov  | erview of the Energy Efficiency Measure Database                      | . 7 |
|---|-----|---|-----|
| 2 | Но  | w to:   | . 8 |
|   | 2.1 | Get started   | 8   |
|   |     | 2.1.1 Overview  | 9   |
|   |     | 2.1.2 Accessing the Energy Efficiency Measure Database User Interface | 10  |
|   |     | 2.1.3 EEM User Interface  | 13  |
|   | 2.2 | Manage Energy Efficiency Measures                                     | 14  |
|   |     | 2.2.1 Measure Detail Overview and Concepts                            | 15  |
|   |     | 2.2.1.1 Versioning  | 15  |
|   |     | 2.2.1.2 First Month in Market/Measure Expiration Date                 | 16  |
|   |     | 2.2.1.3 Measure Detail Modification State                             | 16  |
|   |     | 2.2.1.4 ISO Approval Process/Pending Measure Detail Records           | 16  |
|   |     | 2.2.1.5 No Deleting of a Measure Detail                               | 17  |
|   |     | 2.2.2 Add Measure Detail  | 18  |
|   |     | 2.2.2.1 Manual Entry  | 18  |
|   |     | 2.2.2.2 CSV Upload  | 24  |
|   |     | 2.2.3 Measure Detail Search   | 29  |
|   |     | 2.2.4 View Measure Detail   | 34  |
|   |     | 2.2.5 View Measure Detail History                                     | 37  |
|   |     | 2.2.6 Update Measure Detail   | 40  |
|   |     | 2.2.6.1 Manual Entry  | 40  |
|   |     | 2.2.6.2 CSV Update  | 46  |
|   |     | 2.2.7 View Pending Changes  | 51  |
|   |     | 2.2.8 View Pending Measure Detail                                     | 54  |
|   |     | 2.2.9 CSV Download  | 57  |
|   | 2.3 | Demand Reduction Reporting  | 60  |
|   |     | 2.3.1 Demand Reduction Reporting Requirement                          | 60  |
|   |     | 2.3.2 Demand Reduction Supporting Document                            | 60  |
| 3 | Cu  | stomer Support  | 62  |
|   | 3.1 | By Internet   | 62  |
|   | 3.2 | By Telephone  | 62  |
|   | 3.3 | By Email  | 63  |
|   | 3.4 | Ask ISO   | 63  |
| л | Lin |   | сл  |
| 4 |     |   | 04  |
|   | 4.1 | ISO New England Home Page   | 64  |
|   | 4.2 | ISO New England Training Page   | 64  |
|   | 4.3 | ISO New England FAQ Page  | 64  |
|   | 4.4 | SMD Site for ISO Applications   | 64  |
|   | 4.5 | SMD Site for ISO Sandbox Applications                                 | 64  |
|   | 4.6 | ISO New England Glossary and Acronyms                                 | 64  |
| 5 | Re  | ference Tables  | 65  |
|   | 5.1 | Table 1: EEM Security Roles   | 65  |
|   |     | •   | -   |

| 5.2 | Table 2: EEM Fields, Definitions and Validation Rules | 66 |
|-----|---|----|
| 5.3 | Table 3: Sectors/End Uses                             | 69 |

# **1** Overview of the Energy Efficiency Measure Database

The Energy Efficiency Measure Database (EEM) records and maintains detailed measure level data for On-Peak and Seasonal Peak Demand Resources participating in the Forward Capacity Market with energy efficiency measures. This data is utilized on an ongoing basis by ISO-NE for existing capacity qualification, performance verification and auditing, trending and analysis, system planning, and market monitoring.

EEM is available to Lead Participants as an internet-based tool for:

- Entering new energy efficiency measure data
- Updating existing energy efficiency measure data
- Generating specific reports relating to energy efficiency measure data

Note that beginning June 1, 2017, EEM became the primary source of energy efficiency On-Peak and Seasonal Peak asset reduction values for monthly reporting in CAMS.

Users can interface with EEM via either the user interface or via Web Services. This user guide covers the EEM user interface system functionality. Web Services functionality is covered in the following documents available on ISO New England's website at: https://www.iso-ne.com/participate/support/upload-download.

- Energy Efficiency Measures (EEM) Web Services Data Exchange Specification and
- EEM Web Services API Documentation (WADL, XSD)

# 2 How to:

## 2.1 Get started



This section applies to the following EEM roles:

External EEM Maintainer
External EEM Viewer

See Table 5.1: <u>EEM Security Roles</u> (page 65) for a summary of user roles
This section covers the following topics:

<u>Overview</u> (page 9)
<u>Accessing the Energy Efficiency Measure Database</u> (page 10)
<u>EEM User Interface</u> (page 13)

### 2.1.1 Overview

#### 2.1.1.1 CAMS Security Administrator (SA)

- Access to EEM is managed through the Customer and Asset Management System (CAMS).
- Your company's Security Administrator (SA) is responsible for assigning roles per your company's internal procedures and controls.
- The SA is also responsible for issuing digital certificates to users, as required (e.g., a customer may already have a digital certificate if they already have access to another ISO SMD application).
- For details on managing access, SAs can refer to the "CAMS User Guide for Digital Certificates" which is available by contacting ISO-NE Customer Support.

#### 2.1.1.2 Browser Navigation

• ISO recommends using the navigation buttons within EEM. Navigation using the browser Back button or the keyboard backspace will take you out of EEM and back to the previously opened web page.

#### 2.1.1.3 Online CAMS Frequently Asked Questions

• See the "Customer and Asset and Management System (CAMS)" section on ISO New England's website FAQ page, located at: <u>https://www.iso-ne.com/participate/support/faq</u>/cams

#### 2.1.1.4 ISO New England Glossary and Acronyms

• For a full list of ISO New England terms and acronyms, see the Glossary and Acronyms listing on ISO New England's website at: <u>https://www.iso-ne.com/participate/support/glossary-acronyms</u>

## 2.1.2 Accessing the Energy Efficiency Measure Database User Interface

• I do not have an EEM role or have not installed a digital certificate. How do I access the Energy Efficiency Measure Database user interface?

To get an EEM role and digital certificate:

- 1. Contact your company's Security Administrator (SA) to request access to EEM.
  - a. To learn who at your company is an SA, contact ISO New England Customer Support at (413) 540-4220 or via e-mail at <u>custserv@iso-ne.com</u>.
- 2. Your SA will assign you a specific EEM role.
- 3. Your SA will issue you a digital certificate if you do not already have one.
- 4. ISO New England will email you instructions for installing the certificate on your computer.
  - a. See "Install a digital certificate" in the CAMS User Guide for Digital Certificates which is available by contacting ISO-NE Customer Support or your SA.
  - b. You will need the "PIN #" or "Pickup Password" from your SA to complete the installation process.
- 5. After you have installed your digital certificate, you may access the EEM database through the SMD Applications Homepage or the SMD Applications Sandbox Homepage based on your EEM role.



#### IMPORTANT

It may take up to two hours for the system to implement a new CAMS role.

- I have an EEM role and have installed my digital certificate. How do I access the Energy Efficiency Measure Database user interface?
  - 1. For the EEM Production environment navigate to the ISO New England SMD Applications Home Page at: <u>https://smd.iso-ne.com/</u>.



2. Click on "Energy Efficiency Measure Database":



#### IMPORTANT

- The EEM Database Sandbox is a separate and independent environment that requires separate EEM roles and is accessed via the following link: <u>https://sandboxsmd.iso-ne.com/</u>.
- The SMD Applications Sandbox Home Page uses different fonts, shapes and a red background to differentiate it from the Production SMD Applications Home Page shown above.

3. The Energy Efficiency Measure Database Search screen displays by default:

| Energy Ef                         | ficiency                         | Measure                                    | Databas           | e                       |                          |                         |   |
|-----------------------------------|----------------------------------|--|-------------------|-------------------------|--------------------------|-------------------------|---|
| Search Add Measure Detail R       | Pending                          |  |                   |                         |                          |                         |   |
| Search Criteria                   |                                  |  |                   |                         |                          |                         |   |
| As Of Date:                       | 12/04/2014                       | Retail Customer Name:                      |                   | Program Name:           |                          | Market Month:           |   |
| ISO Measure Detail ID:            |                                  | Asset ID:                                  |                   | Reference Code:         |                          | Min Installation:       | <b>•</b>  |
| Lead Participant:                 | ~                                | Resource ID:                               |                   | City:                   |                          | Max Installation:       | 8   |
| LP Measure Detail ID:             |                                  | Load Zone ID:                              |                   | State:                  |                          | Min Expiration:         | •   |
| Sector/End Use:                   | ~                                |  |                   |                         |                          | Max Expiration:         |   |
|                                   |                                  |  | Search            | Reset                   |                          |                         |   |
|                                   |                                  |  |                   |                         |                          |                         |   |
| Search Results                    |                                  |  |                   |                         |                          |                         |   |
| Lead Meas<br>Participant(ID) Deta | ure Measure<br>il ID Detail Name | Installation First Month<br>Date in Market | Life Measure Expi | Summer Winter Load Zone | (ID Resource(ID) Asset(I | D) Program End Use Name | Retail<br>Customer<br>Name<br>Pending<br>Change |
| No data to display                |                                  |  |                   |                         |                          |                         |   |
|                                   |                                  |  |                   |                         |                          |                         |   |
|                                   |                                  |  |                   |                         |                          |                         |   |
|                                   |                                  |  |                   |                         |                          |                         |   |
|                                   |                                  |  |                   |                         |                          |                         |   |
|                                   |                                  |  |                   |                         |                          |                         |   |
|                                   |                                  |  |                   |                         |                          |                         |   |
|                                   |                                  |  |                   |                         |                          |                         |   |
|                                   |                                  |  |                   |                         |                          |                         |   |
| Totals:                           |                                  |  |                   |                         |                          |                         |   |
|                                   |                                  |  | View Detail       | CSV                     |                          |                         |   |
| []4 []4 ] Page 0 of 0             |                                  |  |                   |                         |                          |                         | No data to display                              |

When the Search screen is opened before any Measure Details have been added to the database, it will be blank as shown above. Once Measure Details have been added, the Search screen will display the first page of all the Measure Details belonging to the Lead Participant matching the certificate used.

# 2.1.3 EEM User Interface

| th Add Measure Detail Finding     Add Of Date: 12/10/2014     Retail Program Name:     Harket Honth:     Exo Of Date:     Interaction:     Interaction:     Program Name:     Harket Honth:     Interaction:        Interaction:              Interaction: <th>Energy</th> <th>Eff</th> <th>iciency</th> <th>Mea</th> <th>sure</th> <th>D</th> <th>ataba</th> <th>ase</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>  | Energy                | Eff                  | iciency  | Mea                  | sure                       | D    | ataba                     | ase          |              |  |   |  |                        |                |                            |                     |                           |
|--|-----------------------|----------------------|--|----------------------|----------------------------|------|---------------------------|--------------|--------------|--|---|--|------------------------|----------------|----------------------------|---------------------|---------------------------|
| As of Date 12/10/2014   As of Date 12/10/2014   As of Date 12/10/2014   Asset Date Program Hame   Hance Program Hame   Hance Hance   Hance Han   |                       |                      |  |                      |                            |      |                           |              |              |  |   |  |                        |                |                            |                     | Menu items                |
| As of Date: 12/10/2014 © Retail Customer Hame: Program Hame: Harket Honth: ©<br>ISO Heasure Detail ID: Asset ID: Reference Code: Hin Installation: ©<br>Led Participant: W Resource ID: City: Hax Installation: ©<br>Sector/Ind Use: W Resource ID: City: Hax Installation: ©<br>Sector/Ind Use: W Resource ID: City: Hax Installation: ©<br>Sector/Ind Use: W Resource ID: City: Hax Installation: ©<br>Resource ID: State: Hin Expiration: ©<br>Max Expiration: ©<br>Resource ID: Reset Action Buttons for Search<br>Resource ID: State: State: City: Reset Action Buttons for Search<br>Reset Result<br>Sector/Ind Use ID: Resource ID: Resource (D) Asset(D) Resource (D) Resource (D) Asset(D) Resource (D) Resource (D) Resource (D) Resou | earch Criteria        |                      |  |                      |                            |      |                           |              |              |  |   |  |                        |                |                            |                     |                           |
| ISO Heasure Detail ID:   Asset ID:   Lead Participant:   Pleasure Detail ID:   Lead Participant:   Sector/End Use:   Vite:   Rest:   Sector/End Use:   Pleasure Detail ID:   Lead Zone ID:   State:   Hin Installation:   Pleasure Detail ID:   Lead Zone ID:   Sector/End Use:   Name:   Pleasure Detail ID:   Lead Zone ID:   State:   Hin Installation:   Action Buttons for Search   Resure:   Plant:   State:   Plant: State: State: State: State: Plant: State: State: State: State: Plant: State: State: State: State: State: State: State: Plant: State:   | As 0                  | Date: 1              | 2/10/2014  | Retail Cu            | istomer Nam                | e:   |                           |              | Pro          | gram Name:                               |   | _  | м                      | arket Month:   |                            | 3                   | a                         |
| Led Parking De Led Articipant in termination in the second of the second                             | TSO Measure Del       | ail The              |  |                      | Accent                     | n    |                           |              | Dafe         | -  |   |  | Mie                    | Installation   |                            |                     | 3                         |
| Led Participant:     Led Participant:     Led Zone ID: State   Nin Expiration:     Sector/Ind Use  | 150 Heasure De        | an 10.               |  |                      | Asset1                     | -    |                           | _            | Ren          | erence coue.                             |   |  |                        | instanation.   |                            | -                   |                           |
| LP Hessure Detail ID: Load Zone ID: State His Expiration: Image: Control of the state in  | Lead Partic           | .ipant:              | ~  |                      | Resource I                 | D:   |                           |              |              | City:                                    |   |  | Max                    | Installation:  |                            | Ľ                   | 1                         |
| Sector/End Use     Next     Next     Action Buttons for Search   | LP Measure De         | ail ID:              |  |                      | Load Zone I                | D:   |                           |              |              | State:                                   |   |  | м                      | in Expiration: |                            | 1                   | 3                         |
| Action Buttons for Search  | Sector/En             | d Use:               | ~  |                      |                            |      |                           |              |              |  |   |  | Ma                     | x Expiration:  |                            |                     | 3                         |
| Search Results       edd       ded       belal       Detail        Detail       Detail       Detail       Detail       Detail       Detail       Detail       Detail       Detail       Detail       Detail       Detail       Detail       Detail <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>/</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th>Action Buttons for Secret</th>  |                       |                      |  |                      |                            |      |                           |              |              | /  |   |  |                        |                |                            |                     | Action Buttons for Secret |
| Action Buttons for Search  |                       |                      |  |                      |                            |      | Search                    |              | Reset        | <u> </u>                                 |   |  |                        |                |                            |                     | Action Buttons for Search |
|  | ead<br>articipant(ID) | Measure<br>Detail ID | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market   | Life | Measure Expi<br>Date      | Summer<br>kW | Winter<br>kW | Load Zone(ID                             | Resource(ID)                            | Asset(ID)  | Program<br>Name        | End Use        | Retail<br>Customer<br>Name | Pending<br>Change   |                           |
| Measure Detail Display   |                       | XXXXX                | NORTH CONTRACTOR CONTRACTOR OF CONTRACTOR OF CONTRACTOR | X0000000000          | X000000000                 | ж    | 1000000000                | ROROROW.     | X0000K       | 100000000000000000000000000000000000000  |   | 100000000000   | 10000000000            | X000000K       | ****                       | 10000K              |                           |
| here are been and a second and                              |                       | NORONOM.             | 100000000000000000000000000000000000000  | 1000000000           | 10000000000                | ж    | 10000000000               | KOOKIK       | 304040404    | 101010300000000000000000000000000000000  | 0000000000                              | 10000000000  | 10000000000            | 1000008        | 100000000                  | X00000              |                           |
| Neasure Detail Display   |                       | NORONOM.             | 100000000000000000000000000000000000000  | 10000000             | 100000000                  | ж.   | 10000000000               | 808080808    | 101010108    | 100000000000000000000000000000000000000  |   | 10000000000  | 100000000000           | 1000008        | 100000000                  | X00000K             |                           |
|  |                       | NOROROW.             |  | 100000000            | 1000000000                 | *    | KINDROKOKOKOKOK           | 808080808    | NOROROR.     | 100000000000000000000000000000000000000  |   | 1000000000000  | 10000000000000         | ADDRESS.       | 10000000000                | NOROROR.            | Measure Detail Display    |
| rela: 579.238 647.084  |                       | 10008                | ADDRESS ADDRES   | 100000000            | 100000000                  | ÷    | ADDODDDDDDDDD             | RORORORO,    | ADDRESS.     | 100000000000000000000000000000000000000  |   | 10000000000000   | 100000000000           | ADDRESS A      | ******                     | A000008             |                           |
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| xali: 579.238 647.084  |                       | NOTES:               | -  | *******              | *******                    | ÷.   | ADDRESS OF TAXABLE PARTY. | RORDERING.   | NUMBER OF    | *****                                    | *********                               | -  | -                      | ADDRESS OF     | ******                     | NORTH OF TAXABLE    |                           |
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| Action Buttons for Search  |                       | NORONOM.             | ADADADADADADADADADADADADADA  | 100000000            | 100000000                  | ж.   | X010101010101010          | RORORORO.    | XOROROW.     | 10 | 000000000                               | 100000000000   | 1000000000000          | 1000000        | 000000000                  | X00000K             |                           |
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| Vera Detal Cov Action Buttons for Search   |                       |                      |  |                      |                            |      |                           | 579.238      | 647.084      |  |   |  |                        |                |                            |                     | -                         |
|  | otals:                |                      |  |                      |                            |      |                           |              |              |  |   |  |                        |                |                            |                     |                           |
|  | otals:                |                      |  |                      |                            |      | View De                   | taí          |              | <del>~ </del>                            |   |  |                        |                |                            |                     | Action Buttons for Searc  |

- The EEM user interface presents menu options on one menu bar.
  - Click on a *menu item* to navigate to the relevant screen.
  - Action buttons appear as needed.
- The same menu selections are available for each role in EEM.
- Action buttons and functionality that do not pertain to your role(s) will not be displayed.
- For details on the different EEM roles, see the Table 1: <u>EEM Security Roles</u> on page 65.

# 2.2 Manage Energy Efficiency Measures

This section applies to the following EEM roles:
£xternal EEM Maintainer
£xternal EEM Viewer
This section covers the following topics:
Measure Detail Overview and Concepts (page 15)
Add Measure Detail (page 18)
Measure Detail Search (page 29)
View Measure Detail (page 34)
Yiew Measure Detail History (page 37)
Update Measure Detail (page 40)
Yiew Pending Changes (page 51)
Yiew Pending Measure Detail (page 54)

This section of the guide explains the processes for managing energy efficiency Measure Details within the user interface. Topics covered include creating and updating Measure Details, including those that require ISO-NE approval, the process of searching for Measure Details, and producing CSV file downloads based on the search results. To access EEM, see "<u>Accessing the Energy Efficiency Measure Database</u>" on page 10.

## 2.2.1 Measure Detail Overview and Concepts

A Measure Detail is a component of an existing On-Peak or Seasonal Peak Measure registered in the Customer and Asset Management System (CAMS). It contains detailed measure level data that better describes its part of the CAMS Measure. A single CAMS Measure is generally comprised of many Measure Detail records stored in EEM. There are several key concepts that are important to understand when creating or maintaining a Measure Detail.

#### 2.2.1.1 Versioning

There will only be one version of a Measure Detail effective at any given time. Each Measure Detail version has a Record Begin Date which is when the set of data associated with that version became effective, and a Record End date which is the end of the effective period for that set of data. The Record Begin Date is set to the system time when a Measure Detail record is created or updated. When an update is done, the existing record will have its Record End Date set to the Record Begin Date of the new set of Measure Detail data. This versioning scheme provides the ability to store a searchable history of changes to a Measure Detail. The History tab will display the various versions associated with the Measure Detail (see "<u>View Measure Detail History</u>" on page 37).

| Ene                  | ergy Ef           | fficien         | су М                    | easu                   | re Da                | ntaba                    | ase  | e                             |           |           |              |                 |          |                            |                   |               |
|----------------------|-------------------|-----------------|-------------------------|------------------------|----------------------|--------------------------|------|-------------------------------|-----------|-----------|--------------|-----------------|----------|----------------------------|-------------------|---------------|
|                      |                   |                 |                         |                        |                      |                          |      |                               |           |           |              |                 |          |                            |                   |               |
| Measu                | re Detail 🎽 Pendi | ng History      |                         |                        |                      |                          |      |                               |           |           |              |                 |          |                            |                   |               |
| Measur               | e Detail History  |                 |                         |                        |                      |                          |      |                               |           |           |              |                 |          |                            |                   |               |
| Measure<br>Detail ID | Record Begin Date | Record End Date | LP Measure<br>Detail ID | Measure<br>Detail Name | Installation<br>Date | First Month<br>in Market | Life | Measure<br>Expiration<br>Date | Summer kW | Winter kW | Measure (ID) | Program<br>Name | End Use  | Retail<br>Customer<br>Name | Aggregat<br>Count | Updated<br>By |
| X0000X               | 01/09/2015        | -               | Xxxxxxxx                |                        | 11/12/2013           | 09/01/2014               |      | 1.07117905                    | 5.4       | 4         | Хоооооох     | Ххохохох        | Lighting |                            | 1                 | Хюнноноск     |
| X0000X               | 01/06/2015        | 01/09/2015      | Xxxxxxxxx               |                        | 11/12/2013           | 09/01/2014               | 181  | 1,171,17817                   | 5.4       | 4         | Xxxxxxxxx    | Xxxxxxxx        | Lighting |                            | 1                 | Xxxxxxxxx     |
| X0000X               | 12/01/2014        | 01/06/2015      | Xxxxxxxx                |                        | 11/12/2013           | 09/01/2014               | 181  | 1010997                       | 5         | 4         | X000000x     | X000000x        | Lighting |                            | 1                 | Xxxxxxxx      |



#### **IMPORTANT**

- Record Begin Date and Record End Date are independent of First Month in Market and Measure Expiration Date, which are driven by Installation Date and Measure Life.
- The History tab will display the versions of the Measure Detail.
- The As of Date in the search screen may be used to view a specific version. See "<u>Measure Detail Search</u>" on page 29 for instructions on searching measure detail data.

#### 2.2.1.2 First Month in Market/Measure Expiration Date

First Month in Market (also known as First Month of Savings) is determined by the EEM system at the time of Measure Detail creation by taking the greater of:

- The first of the month following the user provided Installation Date, or
- The date found by subtracting 70 days from the current system time and taking the top of the month within which this date falls.

These calculations model the customer data submission deadlines for initial settlement and data reconciliation (e.g., resettlement).

The Measure Expiration Date is determined by the EEM system by the following process:

- The Measure Life in years (one decimal point allowed) is converted to months. The whole number of months is used and any decimal values are truncated. For example: 1.9 years x 12 = 22.8 months = 22 months in the market.
- To get the Measure Expiration Date, the calculated number of months is added to the Installation Date and recorded as the first of the month. This is the Measure Expiration Date and the month is the last month in market.
- Example:
  - Measure Detail installed June 25, 2015 with a 1.9 year life
    - July 2015 is First Month in Market
    - Measure Expiration Date is April 1, 2017
    - April 2017 is last month in market
    - 22 months of performance in the FCM

The Measure Expiration Date and the First Month in Market will be recalculated and may change if a user modifies the Installation Date.

#### 2.2.1.3 Measure Detail Modification State

Measure Details can be in two modification states during their lifetime: Open or Closed, as defined below. These states are used to determine whether modifications to certain fields (such as Monthly kW Summer and Monthly kW Winter) require ISO approval.

- **<u>Open</u>**: The resettlement data correction deadline for the First Month in Market has *not* passed.
- <u>**Closed</u>**: The resettlement data correction deadline for its First Month in Market has passed.</u>

#### 2.2.1.4 ISO Approval Process/Pending Measure Detail Records

In certain cases (Installation Date is more than three years prior to the date of Measure Detail entry, monthly kW Summer or Winter values are being modified for a Measure Detail that is Closed, etc.) the Measure Detail record will be stored in a Pending status. When a Measure Detail is Pending, no further edits can be made and the measure must be reviewed and approved by ISO before becoming effective. Users have the ability to view and cancel Pending records through the User

Interface if additional edits are required. Measure Details or changes to a Measure Detail that are in a Pending status and either cancelled by the LP or rejected by ISO are not searchable through the UI and are not recorded in the Measure Detail History. When an ISO analyst approves or rejects a pending Measure Detail, the ISO analyst will notify the LP of the disposition of the change. (See "<u>View Pending Changes</u>" on page 51 and "<u>View Pending Measure Detail</u>" on page 54.)

#### 2.2.1.5 No Deleting of a Measure Detail

Once a Measure Detail is submitted and/or approved in the Production environment, it cannot be deleted from the database. If a Measure Detail is erroneously submitted and/or approved, both the Summer and Winter kW must be set to zero and the Measure Life set to the minimum allowed to remove the contribution of this Measure Detail from all past and future performance and capacity calculations.

### 2.2.2 Add Measure Detail

This section covers the process of adding a new Measure Detail to the system.

- Role that can perform this task:
  - o External EEM Maintainer

See Table 2: <u>EEM Fields</u>, <u>Definitions and Validation Rules</u> on page 66 for an overview of the requirements of every database field.

#### 2.2.2.1 Manual Entry

- 1. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 2. Click on "Add Measure Detail" in the menu bar:

# **Energy Efficiency Measure Database**

Search Add Measure Detail Pending

3. The Measure Detail screen is displayed and is ready for data entry. Required fields are highlighted in red:

| n Add Measure Detail Pending  |                          |        |
|-------------------------------|--------------------------|--------|
| easure Detail Pending History |                          |        |
| Basic                         | CAMS Fields              |        |
| Lead Participant:             | Measure:                 | ······ |
| ISO Measure Detail ID:        | Asset:                   |        |
| LP Measure Detail ID:         | Resource:                |        |
| Measure Detail Name:          | Load Zone:               |        |
| Distribution Company:         | Retail Customer          |        |
| Installation Date:            | Retail Customer Name:    |        |
| First Month in Market:        | Street:                  |        |
| Measure Life (yrs):           | City:                    |        |
| Measure Expiration Date:      | State:                   | ~      |
| Program Name:                 | Zip:                     |        |
| Sector/End Use:               | Reference Documentation  |        |
| Custom End Use:               | Reference Document Name: |        |
| Aggregation: N                | Measure Reference Code:  |        |
| Number of Aggregation: 1      | Misc                     |        |
| Monthly kW Summer:            | Date Updated:            |        |
| Monthly kW Winter:            | Updated By:              |        |
|                               | Comments:                | I      |
|                               |                          |        |
|                               |                          |        |



#### IMPORTANT

- Fields are highlighted in red at the beginning of the creation process to indicate they are required fields for all Measure Detail configurations.
- Some fields are only required for certain Measure Detail data configurations.
- If a field becomes required based on the entered data, it will become highlighted in red.
- 4. Enter data in each field based on following rules and validations:

#### Basic

- **Lead Participant**: Not editable. Displays Customer Name and ID for logged in external user.
- **ISO Measure Detail ID**: Not editable. System generated after successful creation of Measure Detail. Each ISO Measure Detail ID is unique throughout the EEM database system.
- **LP Measure Detail ID**: Required. Alphanumeric values accepted. Limited to 100 characters. Must be unique to the Lead Participant. Used during the Measure Detail creation process for measures created by either the user interface or uploaded through web services in an attempt to limit duplicate Measure Detail records and provide Participant with a key field to match with their database. The LP Program Manager determines the format the creation of this field. Since the search will return partial matches based on the search string, the LP database administrator must select the format for the creation of this field as well as the search string required for any Measure Detail.
- <u>Measure Detail Name</u>: Required. Alphanumeric values accepted. Limited to 100 characters. Special characters such as commas and double quotation marks should not be used.
- **Distribution Company**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Only numeric values accepted. Request the numeric code for a specific distribution company through an Ask ISO Issue.
- **Installation Date**: Required. Must be a valid date in MM/DD/YYYY format, after June 16, 2006 the initial qualification date for the Forward Capacity Market and prior to the current system date. If more than three years prior to the current system date, the new Measure Detail will be put into Pending and will require ISO approval before being applied (see "ISO Approval Process/Pending Measure Detail <u>Records</u>" on page 16).

- **<u>First Month in Market</u>**: Not editable. System generated using Installation Date and system date. See "<u>First Month in Market/Measure Expiration Date</u>" on page 16.
- <u>Measure Life (yrs)</u>: Required. Must be numeric, with at most one decimal place. Cannot be greater than ISO defined maximum (currently 30 years).
- <u>Measure Expiration Date</u>: Not editable. System generated using Installation Date and Measure Life (yrs). See "<u>First Month in Market/Measure Expiration Date</u>" on page 16.
- **<u>Program Name</u>**: Required. Alphanumeric values accepted. Limited to 100 characters.
- <u>Sector/End Use</u>: Required. Value must be chosen from drop-down list. Each Sector has a "Custom Measures" option. See Table 3: <u>Sectors/End Uses</u> on page 69 for the full list.
- **<u>Custom End Use</u>**: Required if a "Custom Measures" option is chosen for Sector/End Use. Limited to 100 characters.
- <u>Aggregation</u>: Required. Limited to 'Y' and 'N'. Defaults to 'N'. Yes is used when multiple end uses are aggregated into a single Measure Detail.
- **<u>Number of Aggregation</u>**: Required. Only editable if Aggregation value is 'Y'. Must be greater than zero. Defaults to 1 if Aggregation = N. Rounds to the nearest whole number using standard rounding rules. Limited to seven digits.
- <u>Monthly kW Summer</u>: Required. Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Entered value is rounded to three decimal places using standard rounding rules.
- <u>Monthly kW Winter</u>: Required. Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Entered value is rounded to three decimal places using standard rounding rules.

#### CAMS Fields

- <u>Measure</u>: Required. Value must be chosen from a drop-down list. List contains CAMS measures that are On-Peak or Seasonal Peak that belong to the Lead Participant of the logged in user.
- <u>Asset</u>: Not editable. System generated based on value chosen in Measure dropdown list.
- **Resource**: Not editable. System generated based on value chosen in Measure dropdown list.
- **Load Zone**: Not editable. System generated based on value chosen in Measure drop-down list.

#### **Retail Customer**

- **<u>Retail Customer Name</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 100 characters.
- <u>Street</u>: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 50 characters.
- <u>**City</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 50 characters.</u>

- <u>State</u>: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Limited to the six New England states. Value must be chosen from a drop-down list.
- **<u>Zip</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Must contain exactly five digits.

#### **Reference Documentation**

- **<u>Reference Document Name</u>**: Required. Alphanumeric values accepted. Limited to 100 characters.
- <u>Measure Reference Code</u>: Required. Alphanumeric values accepted. Limited to 100 characters.

#### Misc

- **Date Updated**: Not Editable. Generated by EEM using the system date and time of the Measure Detail creation. See "<u>Versioning</u>" on page 15.
- **<u>Updated By</u>**: Not editable. Generated by EEM using the user name associated with the certificate of the logged in user.
- **<u>Comments</u>**: Optional on data entry but required for data updates. Alphanumeric values accepted. Limited to 4,000 characters.
- 5. Click the "Submit" or "Cancel" button.
  - <u>Submit</u>:
    - If there are validation errors, a message will be displayed asking the user to correct the indicated validation errors and try again:

| Energy Eff             | iciency Measure D                           | atabase                  |   |   |
|------------------------|---|--------------------------|---|---|
|                        |   |                          |   |   |
| Measure Detail Pending | History                                     |                          |   |   |
| Basic                  |   | CAMS Fields              |   |   |
| Lead Participa         | ht: 1000000000000000000000000000000000000   | Measure:                 | 100000000000000000000000000000000000000 |   |
| ISO Measure Detail     |   |                          | 100000000000000000000000000000000000000 | KXX.  |
| LP Measure Detail      | D: 1000000000000000000000000000000000000    |                          | 100000000000000000000000000000000000000 | 2008  |
| Measure Detail Nan     | e: 1000000000000000000000000000000000000    |                          | 100000000000000000000000000000000000000 | KXX.  |
| Distribution Compar    | N: NOROCOCOCOCOCOCOCOCOCOCOCOCOCOCOCOCOCOCO | Retail Customer          |   |   |
| Installation Da        | te: 12/01/2014                              | Retail Customer Name:    | 000000000000000000000000000000000000000 | COX.  |
| First Month in Mark    | et:   | Street:                  | 100000000000000000000000000000000000000 | 000   |
| Measure Life (yr       | s): 22                                      | City:                    |   | KAKK.   |
| Measure Expiration Da  | e:  | State:                   | нововововово ~                          |   |
| Program Nan            | le:   | Zip:                     | 100000000000000000000000000000000000000 | XXX   |
| Sector/End U           | e: COMMERCIAL - Custom Measures (Large) 🗸   | Reference Documentation  | Validation                              | 8   |
| Custom End U           | e: 1000000000000000000000000000000000000    | Reference Document Name: | 100000000000                            |   |
| Aggregatio             | n: N  | Measure Reference Code:  | ICOCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCC  | ect the indicated validation errors and try again |
| Number of Aggregatio   |   | Misc                     |   | ok  |
| Monthly kW Summ        | er: 33                                      |                          |   |   |
| Monthly kW Wint        | er: 23                                      |                          |   |   |
|                        |   | Comments:                | 100000000000000000000000000000000000000 | 00  |
|                        |   |                          |   | Submit Cancel                                     |

• If the entered Installation Date is more than three years prior to the current system date, the new Measure Detail will be put into Pending and will require ISO approval before being applied:

| Energy Effi                      | ciency Measure D                        | atabase                 |   |  |   |
|----------------------------------|---|-------------------------|---|--|---|
| Search Add Measure Detail Pendin | g                                       |                         |   |  |   |
| Measure Detail Pending           | History                                 |                         |   |  |   |
| Basic                            |   | CAMS Fields             |   |  |   |
| Lead Participant:                | ••••••••••••••••••••••••••••••••••••••• |                         | 000000000000000000000000000000000000000 | 10000X ¥   |   |
| ISO Measure Detail ID:           | 100000000000000000000000000000000000000 |                         | 000000000000000000000000000000000000000 | 0000000  |   |
| LP Measure Detail ID:            | 100000000000000000000000000000000000000 |                         | 100000000000000000000000000000000000000 | 1000000X   |   |
| Measure Detail Name:             | 100000000000000000000000000000000000000 |                         | 100000000000000000000000000000000000000 | ICICICION CONTRA C |   |
| Distribution Company:            | 100000000000000000000000000000000000000 | Retail Customer         |   |  |   |
| Installation Date:               | 12/01/2010                              |                         | 100000000000000000000000000000000000000 | RORODOR .  |   |
| First Month in Market:           | 10/01/2014                              |                         | 100000000000000000000000000000000000000 | 20000000   |   |
| Measure Life (yrs):              |   |                         | 100000000000000000000000000000000000000 | 20000000   |   |
| Measure Expiration Date:         | 300000000000                            |                         |   |  |   |
| Program Name:                    | 100000000000000000000000000000000000000 |                         | 000000000000000000000000000000000000000 | ICICICIC CONTRACTOR CONTRACT |   |
| Sector/End Use:                  | x0000000000000000000000000000000000000  | Reference Documentation | (                                       | Info   | 1 |
| Custom End Use:                  | 100000000000000000000000000000000000000 |                         | 100000000000000000000000000000000000000 |  |   |
| Aggregation:                     | x0000000000000000000000000000000000000  |                         | 100000000000000000000000000000000000000 | Placed insert on hold awaiting approval  |   |
| Number of Aggregation:           |   | Misc                    |   |  |   |
| Monthly kW Summer:               |   |                         | 100000000000000000000000000000000000000 | 0000000  | , |
| Monthly kW Winter:               |   |                         | 000000000000000000000000000000000000000 | COCCOCCC.  |   |
|                                  |   |                         | 100000000000000000000000000000000000000 | 3000000  |   |
|                                  |   |                         |   | Cancel   |   |

• Otherwise, if there are no validation errors, a message will be displayed informing the user that the data was successfully added and the user will be brought to the Measure Detail tab for the just created Measure Detail:

| Energy Effic                      | ciency Measure D                        | Database                |   |                                  |
|-----------------------------------|---|-------------------------|---|----------------------------------|
| Search Add Measure Detail Pending |   |                         |   |                                  |
| Measure Detail Pending I          | History                                 |                         |   |                                  |
| Basic                             |   | CAMS Fields             |   |                                  |
| Lead Participant:                 | 80000000000000000000000000000000000000  |                         | 000000000000000000000000000000000000000 | 000 ×                            |
| ISO Measure Detail ID;            | x0000000000000000000000000000000000000  |                         | 100000000000000000000000000000000000000 | 000000                           |
| LP Measure Detail ID:;            | x0000000000000000000000000000000000000  |                         | 000000000000000000000000000000000000000 | 000000                           |
| Measure Detail Name:;             | 100000000000000000000000000000000000000 |                         | 000000000000000000000000000000000000000 | oooox                            |
| Distribution Company:             | 000000000000000000000000000000000000000 | Retail Customer         |   |                                  |
| Installation Date:                | 12/01/2010                              |                         | 100000000000000000000000000000000000000 | 000000                           |
| First Month in Market:            | 10/01/2014                              |                         | 100000000000000000000000000000000000000 | 100000K                          |
| Measure Life (yrs):               |   |                         | 100000000000000000000000000000000000000 | 300000K                          |
| Measure Expiration Date:          | NORODODDDDDDDDD                         |                         |   |                                  |
| Program Name:;                    | 100000000000000000000000000000000000000 |                         | 100000000000000000000000000000000000000 | 000000                           |
| Sector/End Use:                   | x0000000000000000000000000000000000000  | Reference Documentation |   | info 🛛                           |
| Custom End Use:;                  |   |                         | 10000000000000000000000                 |                                  |
| Aggregation:                      | x0000000000000000000000000000000000000  |                         | 100000000000000000000000000000000000000 | Data has been successfully added |
| Number of Aggregation:            |   | Misc                    |   | ок                               |
| Monthly kW Summer:                |   |                         | 100000000000000000000000000000000000000 | 000000                           |
| Monthly kW Winter:                |   |                         | 000000000000000000000000000000000000000 | 000000                           |
|                                   |   |                         | ************************                | 00000                            |
|                                   |   |                         |   | Edit                             |

#### • <u>Cancel</u>:

• Creation of Measure Detail is abandoned and user is sent to the Search page. No record of a cancelled Measure Detail is stored in the database.

| earch Criteria  |                |  |  |  |    |                              |                    |                |  |   |  |  |  |  |             |
|-----------------|----------------|--|--|--|----|------------------------------|--------------------|----------------|--|---|--|--|--|--|-------------|
|                 |                |  |  |  |    |                              |                    |                |  |   |  |  |  |  |             |
| As Of           | Date:          | 12/11/2014   | Retail Cu  | stomer Name  | e: |                              |                    | Pro            | gram Name:   |   |  | Ma   | arket Month:   |  |             |
| ISO Measure Det | ail ID:        |  | 1  | Asset I  | 0: |                              | _                  | Refe           | rence Code:  |   |  | Min  | Installation:  |  |             |
| Loo measure bee |                | ha   |  | A South  | -  |                              | _                  | nere           | rence couci  | [ |  |  | Instanderom  |  | _           |
| Lead Partic     | ipant:         | ~  |  | Resource II  | D: |                              | _                  |                | City:  |   |  | Max  | Installation:  |  |             |
| LP Measure Det  | ail ID:        |  | 1  | Load Zone I  | D: |                              |                    |                | State:   |   |  | Mir  | n Expiration:  |  |             |
|                 |                | 1.   | 5  |  |    |                              |                    |                |  |   |  |  |  |  |             |
| Sector/End      | Use:           | *  |  |  |    |                              |                    |                |  |   |  | Ma   | x Expiration:  |  |             |
|                 |                |  |  |  |    |                              |                    |                |  |   |  |  |  | Nome   |             |
|                 |                |  |  |  |    |                              |                    |                |  |   |  |  |  | 1.1.1.1  |             |
|                 | ADDA.          | REAL PROPERTY AND ADDRESS OF   | RECORDERED AND ADDRESS.  | ADDRESS OF THE OWNER   | ÷  | CONTRACTOR OF T              | ROUTER.            | ADDRESS.       | RANGE AND ADDRESS  |   | ADDRESS OF TAXABLE PARTY OF TAXABLE PART | EXCLUSION .  | REPORT.  |  | ADDRESS.    |
|                 | ALCONG.        | *****  | ACCOUNT OF A   | ACCOUNTS OF A  | ÷. | ACCOUNTS OF A                | ACCORD.            |                |  |   | And a second sec | ADDRESS OF THE OWNER.  | ALCOLUMN .   | ACCOUNTS OF A  | ADDRESS.    |
|                 | 10000          |  | ******   | ADDRESS OF ADDRES | ÷. | NAMES OF TAXABLE PARTY.      | NORTH OF THE OWNER | ADDRESS.       | *****  |   | NUMBER OF TAXABLE PARTY.   | NUMBER OF TAXABLE PARTY.   |  | ADDRESS OF THE OWNER   | ACCORDENCE. |
|                 |                | *****  | ******   | NUMBER OF TAXABLE PARTY.   | ÷. | NAMES OF TAXABLE PARTY.      | WHERE WE ARE A     | 100000         | ADDRESS OF THE OWNER   |   | NUMBER OF TAXABLE PARTY.   | WHERE A PROPERTY AND  | ACCOUNTS.  | *****  | ACCOUNTS.   |
|                 | No.            | And the second second second   | ADDRESS OF TAXABLE PARTY.  | wanterinterinter   |    | RESIDENCE AND ADDRESS OF     | 100000             | *****          | -  |   | NAMES OF A DESCRIPTION OF  | STATISTICS STATISTICS.   | ADDRESS OF   | ADDRESS  | winisters.  |
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|                 | and a          | and a subscription of the  | REPORT OF A  | STATE DOCTORS AND A  | ÷. | STATISTICS.                  | alaminia.          | and the second | alata a la calendaria de la calendaria d |   | with the later to  | and a local distance.  | All Distances of the local distances of the l | alalalalalalalalalala  | -           |
|                 | ALC: N OTHER   | ADDRESS OF TAXABLE PARTY.  | NUMBER OF STREET, STRE | NUMBER OF TAXABLE  | 8  | REAL PROPERTY AND ADDRESS OF | ADDRESS OF         | REAL PROPERTY. | ADDRESS OF THE OWNER   |   | MINISTRATION.  | RESIDENTIAL COLOR  | ADDRESS OF   | ADDRESS OF TAXABLE PARTY.  | ROADEDCH.   |
|                 | HOMAGE.        | ADDRESS OF A DESCRIPTION OF A DESCRIPTIO | ADDRESS OF THE OWNER.  | MONORCHORONOMONON  | *  | REPORT OF THE PARTY OF       | NUMBER OF          | NOTION.        | and descent of the local division of the loc |   | ADDRESS OF TAXABLE PARTY.  | and descriptions.  | ACCOUNTS.  | ADDRESS OF TAXABLE PARTY.  | ROADADAN    |
|                 | MINING.        | ADDRESS OF TAXABLE PARTY OF TAXABLE PART | STATISTICS.  | REALIZATION CONTRACTOR.  | х. | REPORTED AND ADDRESS OF      | ADDRESS.           | ADDRESS.       | ****   |   | REPORT OF A  | ADDRESS OF TAXABLE PARTY OF TAXABLE PART | REPORTS.   | RECORDORADOR   | ROUGHOR.    |
|                 | increased and  | ADDRESS OF A DESCRIPTION OF A DESCRIPTIO | KIGKORDOGER.   | NORONORONOMICK.  | ж. | X0000000000                  | ADDOD.             | RECEIPT.       | *****  |   | RECOVERED AND  | KINGKOKARDONAN   | ADDRESS .  | ADDRESS OF TAXABLE PARTY OF TAXABLE PART | NUMBER.     |
|                 | 10.00          |  |  |  |    |                              |                    |                |  |   |  |  |  |  |             |
| *****           |                |  |  |  |    |                              | E00 229            | 650 094        |  |   |  |  |  |  |             |

#### 2.2.2.2 CSV Upload

Multiple new Measure Details can be added simultaneously using the CSV Upload function. Up to 50 records may be uploaded at a time.

- 1. Prepare a file in CSV format for upload. Specify values for column fields in the following order.
  - **CAMS Measure ID**: Required. This must be for an On-Peak or Seasonal Peak Measure belonging to the Lead Participant of the logged in user.
  - <u>Measure Detail ID</u>: Leave blank. A system generated number will be provided once the Detail data is successfully uploaded.
  - **Lead Participant ID**: Required. Only numeric values accepted.
  - **LP Measure Detail ID**: Required. Alphanumeric values accepted. Limited to 100 characters. Must be unique to the Lead Participant. Used during the Measure Detail creation process for measures created by either the user interface or uploaded through web services in an attempt to limit duplicate Measure Detail records and provide Participant with a key field to match with their database. The LP Program Manager determines the format the creation of this field. Since the search will return partial matches based on the search string, the LP database administrator must select the format for the creation of this field as well as the search string required for any Measure Detail.
  - <u>Measure Detail Name</u>: Required. Alphanumeric values accepted. Limited to 100 characters.
  - **Distribution Company ID**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Only numeric values accepted. Request the numeric code for a specific distribution company through an Ask ISO Issue.
  - <u>Measure Life (yrs)</u>: Required. Must be numeric, with at most one decimal place. Cannot be greater than ISO defined maximum (currently 30 years).
  - **<u>Program Name</u>**: Required. Alphanumeric values accepted. Limited to 100 characters.
  - <u>Sector Type</u>: Required. See Table 3: <u>Sectors/End Uses</u> on page 69 for the full list of eligible options. Must match one of the options on Table 3 completely, including capitalization.
  - <u>End Use Type</u>: Required. See Table 3: <u>Sectors/End Uses</u> on page 69 for the full list of eligible options. Must match one of the options on Table 3 completely, including capitalization.
  - **<u>Custom End Use</u>**: Required if a "Custom Measures" option is chosen for End Use. Limited to 100 characters.
  - <u>Aggregation Flag</u>: Required. Limited to 'Y' and 'N'. Yes is used when multiple end uses are aggregated into a single Measure Detail.
  - **Summer kW**: Required. Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Entered value is rounded to three decimal places using standard rounding rules.
  - <u>Winter kW</u>: Required. Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Entered value is rounded to three decimal places using standard rounding rules.
  - **<u>Retail Customer Name</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric

values accepted. Limited to 100 characters.

- **<u>Street</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 50 characters.
- <u>**City</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 50 characters.</u>
- <u>State</u>: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Limited to the six New England states. Must contain exactly two letters.
- **<u>Postal Code</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Must contain exactly five digits.
- **<u>Reference Doc Name</u>**: Required. Alphanumeric values accepted. Limited to 100 characters.
- **<u>Reference Code</u>**: Required. Alphanumeric values accepted. Limited to 100 characters.
- **<u>Comments</u>**: Optional for initial entry but required for data updates. Alphanumeric values accepted. Limited to 4,000 characters.
- <u>Installation Date</u>: Required. Must be a valid date in MM/DD/YYYY format after June 16, 2006 the initial qualification date for the Forward Capacity Market and prior to the current system date. If more than three years prior to the current system date, the new Measure Detail will be put into Pending and will require ISO approval before being applied (see "<u>ISO Approval Process/Pending Measure Detail</u> <u>Records</u>" on page 16).
- <u>Aggregation Count</u>: Required. Must be '1' if Aggregation value is 'N'. Must be greater than zero. Rounds to the nearest whole number using standard rounding rules. Limited to seven digits.



#### IMPORTANT

- Do not include column headings in the CSV file that will be uploaded.
   Doing so will prevent the upload of data.
- Do not use special characters in the Measure Detail Name field as these can create errors when exporting data from EEM.

- 2. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 3. Click on "Upload CSV" in the menu bar:



4. The CSV Upload Input Data grid will display, showing the column headings described in step 1 above:

|   | Ener               | y Effi               | ciency l                | Meası                   | ure Data               | base                       |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|---|--------------------|----------------------|-------------------------|-------------------------|------------------------|----------------------------|-----------------|-----------------|-------------|-----------------|-------------------|---------------------|-----------|-----------|-------------------------|--------|------|-------|-------------|-----------------------|-------------------|----------|----------------------|----------------------|--|
| s | sarch Add          | Measure Detail       | Upload CSV              | Pending                 |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   | CSV Uploa          | l Input Data         | ?                       |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   | CAMS<br>Measure ID | Measure<br>Detail ID | Lead<br>Participant(ID) | LP Measure<br>Detail ID | Measure<br>Detail Name | Distribution<br>Company ID | Measure<br>Life | Program<br>Name | Sector Type | End Use<br>Type | Custom<br>End Use | Aggregation<br>Flag | Summer kW | Winter kW | Retail<br>Customer Name | Street | City | State | Postal Code | Reference<br>Doc Name | Reference<br>Code | Comments | Installation<br>Date | Appregation<br>Count |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |
|   |                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   | Add                 | Edit      | Clear     |                         |        |      |       |             |                       |                   |          |                      |                      |  |
| μ | (                  |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |        |      |       |             |                       |                   |          |                      |                      |  |

- 5. Drag and drop the file intended for upload directly into the blank table body on the CSV Upload Input Data screen. The file data will populate on this screen momentarily. Once this has occurred, click the "Add" button.
  - The "Clear" button may be used at any time to remove uploaded data before it is added to the database.

| 1   | Energ               | yy Effic             | iency                                  | Meası                   | ıre Datal              | base                       |                    |                        |               |                 |                   |                     |                      |           |                              |                      |                   |            |                       |                       |                        |          |                              |                      |   |
|-----|---------------------|----------------------|--|-------------------------|------------------------|----------------------------|--------------------|------------------------|---------------|-----------------|-------------------|---------------------|----------------------|-----------|------------------------------|----------------------|-------------------|------------|-----------------------|-----------------------|------------------------|----------|------------------------------|----------------------|---|
|     |                     |                      | Upload CSV                             | Pending                 |                        |                            |                    |                        |               |                 |                   |                     |                      |           |                              |                      |                   |            |                       |                       |                        |          |                              |                      |   |
|     | SV Uploa            | Input Data           | 0                                      |                         |                        |                            |                    |                        | _             |                 |                   |                     |                      |           |                              |                      |                   |            |                       |                       |                        |          |                              |                      | _ |
| 0.0 | AMS<br>leasure ID   | Measure<br>Detail ID | Lead<br>Participant(ID)                | LP Measure<br>Detail ID | Measure<br>Detail Name | Distribution<br>Company ID | Measure<br>Life    | Program<br>Name        | Sector Type   | End Use<br>Type | Custom<br>End Use | Appregation<br>Flag | Summer kW            | Winter kW | Retail<br>Customer Name      | Street               | City              | State      | Postal Code           | Reference<br>Doc Name | Reference<br>Code      | Comments | Installation<br>Date         | Aggregation<br>Count |   |
|     | X000000             | 10000000             | X000000000X                            | 10000000                | **********             | 100000000                  | 1000000            | 100000000              | 10000000000   | X000000000      | 10000000          | 10000000            | 10000000             | 10000000  | 100000000000                 | X0000000<br>X0000000 | XXXXXX<br>XXXXXX  | XX<br>XX   | X00000X               | 10000000              | 100000000              | 10000000 | 1000000000                   | 000000               |   |
|     | X00000X<br>X0000X   | 10000000<br>10000000 | X00000000X<br>X00000000X               | 10000000<br>10000000    | 100000000000           | 100000000                  | X00000X<br>X00000X | 10000000               | 100000000000  | 100000000       | 10000000          | 10000000            | 10000000             | 10000000  | x00000000000<br>000000000000 | 10000001<br>1000000  | XXXXXX<br>XXXXXXX | XX<br>XX   | XXXXXXXX<br>XXXXXXXXX | 10000000<br>10000000  | 100000000              | 10000000 | 1000000000                   | 1000000<br>1000000   |   |
|     | XXXXXXX<br>XXXXXXXX | 10000000             | 100000000                              | 10000000                | 10000000000            | 10000000                   | 1000001            | 10000000               | 10000000000   | 100000000       | 10000000          | 10000000            | 1000000              | 10100000  | 10000000000                  | 1000000              | X0000X<br>X0000X  | XX<br>XX   | 300000X<br>300000X    | 1000000               | 10000000               | 10000000 | X000000000<br>X000000000     | 000000               |   |
|     | XXXXXX              | 1000000              | 200000000                              | 10000000                | 10000000000            | 100000000                  | 100000             | 10000000               | 10000000000   | 100000000       | 10000000          | 10000000            | 1000000              | 10000000  | 10000000000                  | X000000              | X0000             | XX         | XXXXXXX               | 1000000               | 100000000              | 10000000 | 200000000                    | 000000               |   |
|     | X00000              | 1000000              | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 1000000                 | 100000000000           | 10000000                   | 1000000<br>1000000 | 10000000               | 10000000000   | 100000000       | 10000000          | 10000000            | 10000000             | 10000000  | 10000000000                  | 1000000              | XXXXXX<br>XXXXXX  | XX         | XXXXXXXX<br>XXXXXXXX  | 1011000               | 100000000              | 1000000  | 1000000000                   | 000000               |   |
|     | X00000X<br>X00000X  | X0000000<br>X0000000 | X00000000X<br>X00000000X               | 10000000                | 1000000000000          | 100000000                  | 1000000<br>1000000 | x00000000<br>x00000000 | 1000000000000 | 100000000       | 100000000         | 10000000            | X0000000<br>X0000000 | 100000000 | 100000000000                 | X000000X<br>X000000X | X0000X<br>X0000X  | 30X<br>30X | X00000K<br>X00000K    | 10000000              | x00000000<br>x00000000 | 10000000 | XXXXXXXXXXXX<br>XXXXXXXXXXXX | 000000X              |   |
|     | X00000              | 10000000             | 200000000                              | 1000000                 |                        | 10000000                   | 1000001            | 10000000               | 1000000000    | 100000000       | 10000000          | 1000000             | 10000000             | 10100000  | 1000000000                   | 10000000             | X0000X<br>X0000X  | XX<br>XX   | XXXXXXXX              | 1000000               | 10000000               | 1000000  | 100000000                    | 000000               |   |
|     | 1000000             | 20000000             | 200000000                              | 10000000                | 10000000000            | 10000000                   | X0000X             | 100000000              | 20000000000   | 200000000       | 10000000          | 10000000            | 10000000             | 10000000  | 10000000000                  | X000000              | X00000            | **         | XXXXXXX               | 10000000              | 200000000              | 10000000 | 100000000                    | 000000               |   |
|     | 100000              | X000000X             | 100000000                              | 1000000                 | 100000000000           | 100000000                  | 1000000            | 10000000               | 10000000000   | 100000000       | 10000000          | 10000000            | 10000000             | 10000000  | 10000000000                  | 1000000              | X0000X            | ж          | X00000X               | 10000000              | 10000000               | 10000000 | 100000000                    | 000000               |   |
| -   |                     |                      |  |                         |                        |                            |                    |                        |               |                 |                   | Add                 | Edit                 | Clear     |                              |                      |                   |            |                       |                       |                        |          |                              |                      |   |
| 14  | e.                  |                      |  |                         |                        |                            |                    |                        |               |                 |                   |                     |                      |           |                              |                      |                   |            |                       |                       |                        |          |                              |                      | • |

6. If there are no validation errors, all data that was previously in the data upload grid will disappear and a success message will be shown indicating that these Measure Details have been uploaded.



7. If there are problems with the file, the user may receive an error message similar to this one:

| Er         | ierg           | y Effi                 | ciency                 | Meas                       | ure Data                               | base                       |                 |                         |  |                        |  |                     |                      |                          |   |                    |                  |              |                     |                                       |                        |                        |                          |                      |  |
|------------|----------------|------------------------|------------------------|----------------------------|--|----------------------------|-----------------|-------------------------|--|------------------------|--|---------------------|----------------------|--------------------------|---|--------------------|------------------|--------------|---------------------|---------------------------------------|------------------------|------------------------|--------------------------|----------------------|--|
|            |                |                        |                        |                            |  |                            |                 |                         |  |                        |  |                     |                      |                          |   |                    |                  |              |                     |                                       |                        |                        |                          |                      |  |
| (5)        | Upload         | Input Deta             | 3                      |                            |  |                            |                 |                         |  |                        |  |                     |                      |                          |   |                    |                  |              |                     |                                       |                        |                        |                          |                      |  |
| CAN<br>Mea | S<br>sure ID   | Measure<br>Detail ID   | Lead<br>Participant(ID | LP Measure<br>Detail ID    | Measure<br>Detail Name                 | Distribution<br>Company ID | Measure<br>Life | Program<br>Name         | Sector Type                            | End Use<br>Type        | Custom<br>End Use                      | Aggregation<br>Flag | Summer kW            | Winter kW                | Retail<br>Customer Name                 | Street             | City             | State Po     | stal Code           | Reference<br>Doc Name                 | Reference<br>Code      | Comments               | Installation<br>Date     | Aggregation<br>Dount |  |
| 20         | XXXXX          | XXXXXXXX               | 20120200               | X00000000                  | X00000000000                           | 10000000                   | XX              | X0000300X               | X10030030000                           | 20000000               | 100000000                              | ×                   | XXXXXXXX             | 3000000                  | 201201001013                            | 300000X            | 2002000          | XX 2         | 200000              | X200000X                              | XXXXXXXXXX             | X000000X               | X3000000X                | XXX                  |  |
| 20         | XXXXX          | XXXXXXX                | XXXXXXXX               | X000000X                   | 200000000000X                          | X00000000                  | XX              | XXXXXXXXX               | X00000000000                           | X000000X               | 2010010000                             | X                   | XXXXXXXX             | 20000000                 | X0000000000000000000000000000000000000  | X100000X           | XXXXXXX          | XX 7         | X00000              | XIDCIDDCK                             | 20000000               | XXXXXXXXX              | X000000X                 | X00X<br>X00X         |  |
| 20         | XXXX           | XXXXXXX                | 1000000                | XXXXXXXXXX                 | X0000000000000000000000000000000000000 | 200120120                  | **              | XXXXXXXX                | X3003000000000                         | X3003000               | 2010020100                             | x                   | X00000X              | 30030000                 | XXXXXXXXXXXXXX                          | *****              | 3003000          | XX 2         | XXXXXXX             | XXXXXXXXX<br>XXXXXXXXX                | X 30 30 30 X           | XXXXXXXXXX             | X10130730X               | XXX                  |  |
| 20         | XXXXX          | X00000X                | X0000000<br>X0000000   | X000000X<br>X000000X       | X0000000000000000000000000000000000000 | X00000000<br>X00000000     | XX<br>XX        | XXXXXXXXX<br>XXXXXXXXXX | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | X0000000X              | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | ×                   | X000000X             | 30030030X<br>30030030X   | X0000000000000000000000000000000000000  | X00000X            | 2012000          | XX )<br>XX ) | XXXXXXXX            | X3000000X                             | X0000000<br>X0000000   | X000000X               | X000000X<br>X000000X     | XXXX<br>XXXX         |  |
| 30<br>30   | XIOOX<br>XIOOX | XXXXXXXX<br>XXXXXXXX   | X0000000<br>X0000000   | XXXXXXXXXX<br>XXXXXXXXXXXX | X0000000000000000000000000000000000000 | 3000300300<br>3000300300   | 30X<br>30X      | X000000X                | 300000000000                           | 300000000<br>300000000 | 30000000000000000000000000000000000000 | x<br>x              | X300300X<br>X300300X | X003003000<br>X003003000 | 300300300300X                           | X00000X            | 300000           | XX 3         | 2000000<br>2000000  | X1003000X                             | X10000000<br>X0000000  | 30000000X              | X00000000<br>X0000000    | X00X<br>X00X         |  |
| 30<br>30   | XXXXX          | XXXXXXXXX<br>XXXXXXXXX | XXXXXXXXX<br>XXXXXXXXX | X0000000X<br>X000000X      | X0000000000000000000000000000000000000 | 30000000X                  | XX<br>XX        | X00000000X<br>X0000000X | 3000000000000                          | X00000000<br>X00000000 | 300300300000<br>3003000000             | x<br>x              | XXXXXXXX<br>XXXXXXXX | 3000000X<br>3000000X     | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | XXXXXXX<br>XXXXXXX | 300000<br>300000 | XX 3<br>XX 3 | XXXXXXX<br>XXXXXXXX | X300000X<br>X300000X                  | X0000000<br>X0000000   | X0000000X<br>X000000X  | XXXXXXXXXX<br>XXXXXXXXXX | XXXX<br>XXXX         |  |
| 30<br>30   | XXXXXX         | XIOCIOCX<br>XIOCIOCX   | XXXXXXXXX<br>XXXXXXXXX | X0000000X<br>X000000X      | X0000000000000000000000000000000000000 | X0000000X<br>X0000000X     | 20X<br>20X      | X000000X<br>X000000X    | X0000000000000000000000000000000000000 | 20000002               | 300000000                              | X                   | X00000X              | 20030000                 | XXXXXXXXXXXX                            | 2000000            | 3003000          | XX 7<br>XX 7 | XXXXXXX             | X X X X X X X X X X X X X X X X X X X | X00000000<br>X0000000  | 30030000X<br>30030000X | X100300000<br>X100300000 | XXXX<br>XXXX         |  |
| 20<br>30   | XOOOX<br>XOOOX | X00000X                | 30030000<br>30030000   | X000000X                   | 30000000000000000000000000000000000000 | 300000000<br>300030000     | XX<br>XX        | X000000X<br>X000000X    | X000000000                             | Error                  | and the Alignet Alignet                |                     |                      |                          |   |                    | 300000           | XX 3         | 100000<br>100000    | X300000X                              | X00000000<br>X00000000 | 3000000X<br>3000000X   | X0000000<br>X0000000     | XOX<br>XXX           |  |
| 20         | XXXXX          | X00000X                | 30030000               | X000000X                   | 300000000000X                          | 30000000                   | 300             | 3000000X                | 1000000000                             | The system             | aiready contail<br>K.                  | ns data for a l     | measure deta         | il with LP M             | asure Detail ID                         |                    | 300000           | XX >         | 200000              | X000000K                              | 20000000               | 30000000               | 30000000                 | 3000                 |  |
|            |                |                        |                        |                            |  |                            |                 |                         | _                                      |                        |  |                     |                      |                          |   |                    |                  |              |                     |                                       |                        |                        |                          |                      |  |
|            |                |                        |                        |                            |  |                            |                 |                         |  |                        |  |                     |                      |                          |   |                    |                  |              |                     |                                       |                        |                        |                          |                      |  |

• Click "OK" to be taken back to the data upload screen.

8. To review any errors in the upload file, select "Edit". A list of formatting errors will appear above the table of uploaded data, along with an additional error message.

| Start Number 101       Value 101       Neurone         Very Number 101       Preserve | Energy Efficiency Measure Database   |  |
|--|--|--|
|  |  |  |
| CVU (build loss)         Distant   | Plane fait be lower Vehicition From and Try again       Dire Nutles     fmu       1     J Heave fueld Dire register field.       2     J Heave fueld Dire register field.       3     J Heave fueld Dire register field.       4     J Heave fueld Dire register field.       5     J Heave fueld Dire register field.       6     J Heave fueld Dire register field.       7     J Heave fueld Dire register field. |  |
|  |  |  |

- Click "OK" on the error message to review the list of formatting errors.
- 9. Data cannot be edited directly on the CSV Upload Input Data screen. When review of the list of errors is completed and the CSV file is corrected, click the "Clear" button to remove all data from the upload grid. Re-upload the entire file, including data that was originally correct, by dragging and dropping the corrected file, then selecting the "Add" button.
- 10. If you still receive an error message after correcting all formatting errors and re-uploading a corrected file, there may be validation errors in the EEM database. Some Meaure Details may have been uploaded before an error was detected causing this upload to terminate. If you are unable to find an error in your file, or otherwise unable to upload your own file, reach out to ISO New England Customer Service for additional assistance.



#### IMPORTANT

- New Measure Detail Data and updates to existing Measure Detail Data must be uploaded in separate files.
- It is not possible to upload two separate CSV files at the same time. Attempting to drag a second file into the upload window will overwrite the original data.

## 2.2.3 Measure Detail Search

This section covers the process of searching for Measure Details.

- Roles that can perform this task:
  - o External EEM Maintainer
  - External EEM Viewer
- 1. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 2. The application opens to the Search page by default (note that the As Of Date is prepopulated to the current date by default):

| As Of  | Date:  | 12/11/2014   | Retail Cu  | stomer Name   | 2:                              |  |  | Pro  | gram Name:   |  |   | Ma   | arket Month:  |  | 0  |
|--|--|--|--|---|---------------------------------|--|--|--|--|--|---|--|---|--|--|
|  | 1.70   |  | 1  |   | -                               |  | -  |  |  |  |   |  |   |  | 10   |
| 150 Measure Det  | all ID:  |  | 1  | Asset II  |                                 |  | _  | Refe   | rence Code:  |  |   | Min  | Installation:   |  | E  |
| Lead Partic  | ipant:   | *  |  | Resource II   | ):                              |  |  |  | City:  |  |   | Max  | Installation:   |  | 0  |
| I P Measure Det  | ail ID.  |  | i  | Load Zone II  |                                 |  |  |  | States   |  |   | M  | n Expiration:   |  | 10   |
| Le ricasure Det  |  |  | 1  | Load Long II  |                                 |  |  |  | state:   |  |   | 191  | a copiración:   |  |  |
| Sector/En  | d Use:   | ~  |  |   |                                 |  |  |  |  |  |   | Ma   | x Expiration:   | -  | 0  |
| ead<br>Participant(ID)   | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date   | First Month<br>in Market  | Life                            | Measure Expi<br>Date   | Summer<br>kW   | Winter<br>kW   | Load Zone(IC   | Resource(ID)                                 | Asset(ID)   | Program<br>Name  | End Use   | Retail<br>Customer<br>Name   | Pending<br>Change  |
|  | ****   | and an other statements of   | *****  | -   |                                 | -  | *****  | *****  |  |  | -   | *******  | *****   | *********  | and the second   |
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3. Enter a value in one or many of the fields in the Search Criteria section:

| Energy Ef                   | ficiency   | Measure               | Database        |                   |          |
|-----------------------------|------------|-----------------------|-----------------|-------------------|----------|
| Search Add Measure Detail F | Pending    |                       |                 |                   |          |
| Search Criteria             |            |                       |                 |                   |          |
| As Of Date:                 | 12/11/2014 | Retail Customer Name: | Program Name:   | Market Month:     |          |
| ISO Measure Detail ID:      |            | Asset ID:             | Reference Code: | Min Installation: |          |
| Lead Participant:           | *          | Resource ID:          | City:           | Max Installation: | <b>•</b> |
| LP Measure Detail ID:       |            | Load Zone ID:         | State:          | Min Expiration:   |          |
| Sector/End Use:             | *          |                       |                 | Max Expiration:   | <b>1</b> |
|                             |            |                       | Search Reset    |                   |          |

The following fields are available and add to the granularity of the search:

- <u>As Of Date</u>: Required. The search will return all Measure Detail versions that are effective as of this date.
- **ISO Measure Detail ID**: ISO's internal identifier that is unique throughout the EEM system. Must be an integer. Search will only return exact matches.
- **Lead Participant**: The only value available in the drop-down list for external users will be the Customer Name and ID for the logged in external user.
- <u>LP Measure Detail ID</u>: Company created unique identifier for the Measure Detail. Alphanumeric values accepted. Since the search will return partial matches based on the search string, the LP database administrator must select the format for the creation of this field as well as the search string required for any Measure Detail.
- <u>Sector/End Use</u>: The Sector and End Use combination to be included in search. Value chosen must be from drop-down list. Each Sector has a "Custom Measures" option. See Table 3: <u>Sectors/End Uses</u> on page 69 for a list of Sectors and End Uses.
- <u>**Retail Customer Name**</u>: Name of Retail Customer to be included in search. Alphanumeric values accepted. Search will return partial matches.
- <u>Asset ID</u>: ID of CAMS Asset to be included in the search. Must be an integer. Search will only return exact matches.
- **Resource ID**: ID of CAMS Resource to be included in the search. Must be an integer. Search will only return exact matches.
- <u>Load Zone ID</u>: ID of CAMS Load Zone to be included in the search. Must be an integer. Search will only return exact matches.
- **<u>Program Name</u>**: Name of Program to be included in search. Alphanumeric values accepted. Search will return partial matches.
- **<u>Reference Code</u>**: Name of Program to be included in search. Alphanumeric values accepted. Search will return partial matches.
- <u>**City</u>**: Name of the City to be included in search. Alphanumeric values accepted. Search will only return exact matches.</u>
- <u>State</u>: Name of the State to be included in search. Alphanumeric values accepted. Searches will only return matches to the two letter abbreviation for a New England state.
- <u>Market Month</u>: When Market Month is set as a search criterion, the search will return unexpired Measure Detail records with a First Month in Market date that is prior or equal to the month chosen as a search criterion. This search calculates the performace value claimed in CAMS.
- <u>Min Installation</u>: When Min Installation is set as a search criterion, the search will return Measure Detail records with an Installation Date that is greater than or equal to the date chosen as a search criterion.
- <u>Max Installation</u>: When Max Installation is set as a search criterion, the search will return Measure Detail records with an Installation Date that is less than or equal to the date chosen as a search criterion.
- <u>Min Expiration</u>: When Min Expiration is set as a search criterion, the search will return Measure Detail records with a Measure Expiration Date that is greater than or equal to the date chosen as a search criterion.
- <u>Max Expiration</u>: When Max Expiration is set as a search criterion, the search will return Measure Detail records with a Measure Expiration Date that is less than or equal to the date chosen as a search criterion.

4. Click the "Search" or "Reset" button.

#### • <u>Search</u>:

• A search will be performed using the criteria specified. The results of the search will be populated in the Search Results section:

| ead<br>'articipant(ID)                  | Meas.<br>Detail          | Measure<br>Detail Name   | Installation<br>Date   | First Month<br>in Market | Life | Measure Expi<br>Date   | Summer<br>kW | Winter<br>kW            | Load Zone(ID Resource(ID)               | Asset(ID)  | Program<br>Name  | End Use  | Retail<br>Customer<br>Name | Pending<br>Change |   |
|---|--------------------------|--|--|--------------------------|------|--|--------------|-------------------------|---|--|--|--|----------------------------|-------------------|---|
|   | 1000                     | -  | 00000000   | -                        |      | ****   | 1000         | 10000                   |   | 1000100000   | -  | 1003000  | ******                     | 10000             | 1 |
|   | 1000                     | *****  | 100000000  | ADDRESS OF               | ж.   | RECEIPTOR OF THE PARTY OF THE P | KORDER       | KOUGH .                 | ******                                  | 10000000000  | RECEIPTION AND ADDRESS OF  | KONDOM.  | RECORDERATES               | 10000             |   |
|   | NUMBER OF TAXABLE PARTY. | REPRESENTATION OF THE OWNER OWN  | ASSESSMENT.  | ADDRESS OF               | ж.   | STREET, STREET | ALCO N.      | NAMES OF TAXABLE PARTY. | ********************                    | *********  | REAL PROPERTY.   | KINGSON .  | KERESISTER.                | STATES.           |   |
|   | ALC: N                   | CONTRACTOR OF STREET,        |  | EXCLUSION .              | ж.   | EXCLUSION IN CONTRACTOR OF   | 10000        | ALCO N.                 | ****************                        | ADDRESS OF TAXABLE PARTY OF TAXABLE PART | STATISTICS.  | ADDRESS OF   | RECORDER.                  | STATES.           |   |
|   | ALC: N                   | CONTRACTOR DO NOTION   | *******  | STOLENSON,               | ж.   | KANADARANA MANA  | KODOK.       | 1000                    | ******                                  | ADDRESS OF THE OWNER   | *****  | NOTION.  | EXCLUSION AND A            | ACCOUNT.          |   |
| 000000000000000000000000000000000000000 | 1000                     | 100000000000000000000000000000000000000  | 10000000   | 100000000                | ж.   | 100000000  | KIOOK.       | 10000                   |   | 1000100000   | 1000000000   | 100000   | 000000000                  | 100008            |   |
|   | KOURS.                   | 10000000000000   | 00000000   | ADDRESS OF               | ж.   | ADDRESS OF   | ROUGH.       | 10000                   |   | RECEIPTION AND ADDRESS OF  | 100000000  | ALCO N.  | 100000000                  | ADDRESS.          |   |
|   | KIER .                   | DESCRIPTION OF THE OWNER.  | *******  | RECEIPTION OF            | 8    | RECEIPTION OF THE PARTY OF THE  | 10000        | 10000                   | **********                              | 10003003000  | STATISTICS.  | 1010308  | STOCKSON,                  | NUMBER.           |   |
|   | ROOM.                    | 100000000000000000000000000000000000000  | 00000000   | COLUMN 2 IS NOT          | 8    | EXCLUSION A  | 10003        | 10000                   |   | Representation of the local division of the  | 1000000000   | STATIST.   | RECORDER NO.               | KINDS .           |   |
| 000000000000000000000000000000000000000 | ROOM N                   | ACCRETION OF TAXABLE PARTY OF TAXABLE PA       | 100000000  | 1000000000               | ж.   | 80000000   | 10000        | 10000                   |   | 10000000000  | 1000000000   | 10030000   | 400000008                  | 10000             |   |
| 000000000000000000000000000000000000000 | NOTION.                  | 000000000000000000000000000000000000000  | 101000000  | STOLENSON,               | ж.   | RECEIPTION OF THE PARTY OF THE  | KINDOK.      | 1000                    | 000000000000000000000000000000000000000 | 1000000000   | 000000000  | RECORD   | 000000000                  | 10000             |   |
| ACCOUNTS AND ADDRESS OF                 | 1000                     | <b>EXCLUSION OF A PARTY </b> | ADDRESS OF TAXABLE PARTY OF TAXABLE PART | <b>ADDRESS</b>           | ж.   | REPORTED AND A   | RANKS.       | ALCO N                  | *****************                       | REPORT   | STATISTICS.  | STREET, STREET | KARDON CONTRACTOR          | STATE.            |   |
|   | ADDRESS.                 | CONTRACTOR NAMES   | REPORTED AND ADDRESS OF  | EXCLUSION.               | 8    | STREET, STREET | 10000        | ALCO N.                 | *****************                       | ADDRESS OF TAXABLE PARTY OF TAXABLE PART | STREET, STREET | ADDRESS OF   | <b>EXCLUSION</b>           | ADDRESS.          | 4 |
|   | KNOK.                    | ACCRECCION ADDRESS   | REASONAGE.   | ADDRESS OF               | ж.   | REAL COLUMN  | 10000        | STOCKS.                 |   | 1000100000   | 11110100   | KERKER.  | \$100000.000A              | 100008            |   |
| otals:                                  |                          |  |  |                          |      |  | 590.238      | 650.084                 |   |  |  |  |                            |                   |   |

- Below the list of Measure Details is a line labeled "Totals." The two values displayed are the totals of either the demand reduction or the expired measures total of the Monthly kW Summer and Monthly kW Winter values for all of the Measure Details returned in the search.
- Each column of the search results may be Sorted in Ascending or Descending order by clicking on the arrow that appears in the left of the column header if the mouse cursor is moved over it:

| Lead<br>Participant(ID)                 | - Measure<br>Detail II | Measure<br>Detail Name                  | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date      | Summer<br>kW | Winter<br>kW            | Load Zone(ID Resource(ID   | ) Asset(ID)   | Program<br>Name   | End Use  | Retail<br>Customer<br>Name | Pending<br>Change | 1 |
|---|------------------------|---|----------------------|--------------------------|------|---------------------------|--------------|-------------------------|--|---|-------------------|--|----------------------------|-------------------|---|
|   | 21 Sort                | Ascending                               | X10000000            | 1000000000               |      | 100000008                 | 1000         | 100000                  |  |   | -                 | 10030308   | 100000000                  | 10000             | 1 |
|   | I Parts                | 1.1                                     | 00000000             | ADDRESSOR.               | ж.   | RECORDERED.               | KORDON.      | KINDON                  |  | NUMBER OF T   | 000000000         | KORDON.  | 1000000000                 | 10000             |   |
| *************                           | AN SHICK               | Descenting                              | REAL PROPERTY.       | STATISTICS.              | ж.   | STATISTICS.               | ALCO N.      | NAMES OF TAXABLE PARTY. | ******************   | a ministration  | ACCRECATE AND     | NUMBER OF T  | REAL PROPERTY OF           | STATES.           |   |
|   | Colum                  | nns 🕨 📖                                 | EXCLUSION AND        | EXCLUSION I              | ж.   | COLUMN 2                  | 10000        | ALCO D                  | ***************  | a accontinues   | 1000000000        | KINDOM.  | EXCLUSION AND              | STATES.           |   |
|   |                        | 100                                     | 00000000             | KANDOW KANDA             | ж.   | 100000000                 | KOODEK.      | ALCO N.                 | *****  | a announcess  | 00000000          | RECEIPTION OF  | EXCLUSION AND A            | ADDRESS.          |   |
| 000000000000000000000000000000000000000 | 1008 3                 | 000000000000000000000000000000000000000 | ECOLOGICS.           | 100000000                | 8    | 800000008                 | ROOM.        | 10000                   | E00030203000000000000000000000000000000  | a. x00000000000   | 100000000         | 10030008   | 100000000                  | NOTION.           |   |
|   | 1008                   |   | 888000000            | COLUMN 2                 | 8    | ADDRESS OF TAXABLE PARTY. | ROUGH.       | 10000                   |  | A RECORDERED  | 1001000000        | KENNON.  | 10000000                   | ADDRESS.          |   |
|   | 1010                   |   |                      | 10110303000              | н.   | <b>EDISOLOGIE</b>         | 10000        | 10000                   | **********   | a annonenen   | ********          | KANDER.  | ******                     | NUMBER            |   |
|   | 1000 1                 |   | KERNELSER.           | TAXABLE IN CO.           | 8.   | EXCLUSION AND             | 10008        | 10000                   |  | a and and a state of the state | ARRENT CONTRACTOR | Distance.  | ARABA ARABA                | 10000             |   |
|   | 1008 1                 |   | COLUMN 2 IN COLUMN   | 1000000000               | ж.   | 10000000                  | 10000        | 10000                   |  | 8 83008300008   | COLUMN 2 IS NOT   | 10030000   | ********                   | KOOKA.            |   |
|   | 1000                   |   | ADDRESS OF           | STATISTICS.              | ж.   | RECEIPTION OF             | ALCO N.      | 10000                   | RECEIPTING AND ADDRESS | A ADDRESSARD  | COLUMN AND A      | RECORD   | EXCLUSION AND ADDRESS      | STATES.           |   |
|   | 1000 1                 |   | ABBRERS, SALES       | STATISTICS.              | ж.   | <b>ADDRESS</b>            | *****        | ALCO N                  | *******************  | A ADDRESSION  | STATISTICS.       | KENNER.  | *********                  | STATE.            |   |
|   | ADDR N                 |   | ********             | BARRANCE.                | 8    | EXPLANATE.                | EXCELSE.     | ALCO N.                 | COTTAGENERAL CONTRACTOR  | a annexation  | STATISTICS.       | ALCO N.  | COLUMN AND                 | STATES.           | 1 |
|   | 1000 1                 |   | ********             | ATAXABLE                 | ж    | APARTNESS.                | ACCORD.      | STATES.                 | ************************   | a anneasonas  | ********          | KARAGER AND A DESCRIPTION OF A DESCRIPTI | *******                    | 11111             |   |
| Fotals:                                 |                        |   |                      |                          |      |                           | 590.238      | 650.084                 |  |   |                   |  |                            |                   |   |
|   |                        |   |                      |                          |      | View De                   | tal          | CSV                     |  |   |                   |  |                            |                   |   |

• Columns may be added or removed from the search results display by moving the mouse cursor over the Columns menu item and selecting one or more columns by clicking in the box next to the column name.

|   |                              |  |          | Lead<br>Participant(ID)                     |  |       |  |  |   |                    |              |  |                           |   |  |                                  | _  |
|---|------------------------------|--|----------|---|--|-------|--|--|---|--------------------|--------------|--|---------------------------|---|--|----------------------------------|----|
| Search Results<br>Lead<br>Participant(ID) | • M                          | easure<br>etail Name                         |          | Measure<br>Detail ID<br>Measure             | st Month<br>Harket                               | Life  | Measure Exp<br>Date  | Summer<br>kW   | Winter<br>kW  | Load Zone(ID       | Resource(ID) | Asset(ID)  | Program<br>Name           | End Use   | Retail<br>Customer<br>Name   | Pending<br>Change                |    |
|   | 2↑<br>Z↓                     | Sort Ascending<br>Sort Descending<br>Columns |          | Detail Name<br>Installation<br>Date         | EXERCICE<br>EXERCICE<br>EXERCICE<br>EXERCICE     | X X X | KORONANA<br>KORONANA<br>KORONANA<br>KARONANA   | 10000<br>10000<br>10000<br>10000                               | ANNAN<br>ADDAN<br>ADDAN<br>ADDAN                    |                    |              | EXCLUSION AND ADDRESS OF ADDRESS  | CONSTRUCTORS<br>ADDRESSOR | ADDRESS<br>NORMALI<br>ADDRESS<br>NORMALI<br>ADDRESS                       | ERICCIONICIO<br>ENCLUERO DE LA COMPANSIÓN<br>EXECUTION DE LA COMPANSIÓN<br>EXECUTION DE LA COMPANSIÓN DE LA COMPANSIÓN<br>EXECUTION DE LA COMPANSIÓN DE LA COMPANSIÓN<br>EXECUTION DE LA COMPANSIÓN DE LA COMPANSIÓN<br>EXECUTION DE LA COMPANSIÓN DE | 80000<br>80000<br>80000<br>80000 | •  |
|   | 1010<br>1010<br>1010         |  |          | First Month<br>In Market<br>Life<br>Measure | ARRESTOR<br>EXCLUSION<br>EXCLUSION<br>EXCLUSION  |       | RECEIPTION OF THE PROPERTY OF  | ADDRESS<br>ADDRESS<br>ADDRESS<br>ADDRESS<br>ADDRESS<br>ADDRESS | ADDRESS<br>ADDRESS<br>ADDRESS<br>ADDRESS<br>ADDRESS |                    |              | RECEIPTION AND ADDRESS OF ADDRESS |                           | ADDIDGO<br>ADDIDGO<br>ADDIDGO<br>ADDIDGO<br>ADDIDGO<br>ADDIDGO<br>ADDIDGO | Announces and a second                    | 10000<br>10000<br>10000<br>10000 |    |
|   | 8000<br>8000<br>8000<br>8000 |  |          | Expiration<br>Date<br>Summer                | EXCLUSION<br>EXCLUSION<br>EXCLUSION<br>EXCLUSION | ***   | ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRESSOR<br>ADDRES | XXXXXX<br>XXXXXXX<br>XXXXXXX<br>XXXXXXX                        | ADDRESS<br>ADDRESS<br>ADDRESS<br>ADDRESS            |                    |              | EXCLUSION OF   | EXCLUSION OF T            | NUMBER OF   | RECORDERATES<br>RECORDERATES<br>RECORDERATES<br>RECORDERATES   | 10000<br>10000<br>10000          |    |
| Totals:                                   | 1000                         | 100000000000000000000000000000000000000      |          | kW<br>Winter<br>kW                          |  | *     | View De  | 590.238  | 650.084<br>CSV                                      | ALL DESCRIPTION OF | ********     | 100000000000   | 00000000                  | REAL PROPERTY AND INC.  | 10000000000  | NAME                             | -  |
| 14 4 Page 1                               | of                           | 이 이 지 않는                                     |          | Load Zone(ID)<br>Resource(ID)               |  |       |  |  |   | -                  |              |  |                           |   | Displaying   | 1 - 12 of                        | 98 |
|   |                              |  | <b>V</b> | Asset(ID)<br>Program<br>Name                |  |       |  |  |   |                    |              |  |                           |   |  |                                  |    |
|   |                              |  | V<br>V   | End Use<br>Retail<br>Customer               |  |       |  |  |   |                    |              |  |                           |   |  |                                  |    |
|   |                              |  | V        | Pending<br>Change                           |  |       |  |  |   |                    |              |  |                           |   |  |                                  |    |

• Controls are available at the bottom of the Search Results section which allow the user to navigate between the displayed pages of Measure Detail results. Clicking the arrows will move back and forth between the pages and entering a number in the white box next to the Page label will navigate directly to that page.

| ead<br>'articipant(ID)   | Measu<br>Detail | Measure<br>Detail Name   | Installation<br>Date  | First Month<br>in Market | Life | Measure Expi<br>Date  | Summer<br>kW | Winter<br>kW            | Load Zone(ID                            | Resource(ID)  | Asset(ID)                        | Program<br>Name | End Use  | Retail<br>Customer<br>Name   | Pending<br>Change |
|--|-----------------|--|---|--------------------------|------|---|--------------|-------------------------|---|---|----------------------------------|-----------------|--|--|-------------------|
|  | 1000            | 100000000000000000000000000000000000000  | 00000000  | 1000033333               | *    | 00000003  | XXXXXX       | 10000                   | 0000000000                              | 000000000000000000000000000000000000000   | 1000000000                       | 100000000       | 1003003  |  | 10000             |
|  | 1000            | 0000000000000000   | REPORTED IN COLUMN  | 10000000                 | ж.   | 1000000000  | ACCOUNT.     | REPORTS.                | 0.00000000                              |   | 00033300008                      | 100000000       | 1003000  | *******  | 100000            |
|  | NAME.           | 100000000000000000000000000000000000000  | COLUMN A  | RECEIPTION AND           | ж.   | REAL PROPERTY.  | KOODA.       | ADDRESS.                | 000000000000000000000000000000000000000 |   | ADDRESS OF TAXABLE               | EXCLUSION OF    | STREET, STREET | 10100030008  | STORES.           |
|  | 101303          | ADDRESS CONTRACTORS  | ADDRESS OF T  | RECORDERED.              | ж.   | RECEIPTION AND ADDRESS OF   | KORDON.      | 1000                    | ******                                  | COLUMN AND ADDRESS OF THE OWNER OWNER OF THE OWNER OWNE OWNER OWNER OWNER OWNER OWNER OWNER OWNER OWNE OWNER OWNE OWNE | ADDRESS OF T                     | 100000000       | 1010031  | <b>CONTRACTOR</b>  | ACCURATE A        |
|  | NOTES:          | TAXABLE PARTY AND ADDRESS OF   | REAL PROPERTY.  | COLUMN 2 IS NOT          | κ.   | <b>EXAMPLE 1</b>  | READS.       | ALCO N.                 | *******                                 |   | ADDRESS OF A                     | *********       | KIERONA.   | ADDRESS OF   | ACCR.             |
|  | 1000            | 100000000000000000000000000000000000000  | 00000000  | 1000000000               | ж.   | RECEIPTION OF THE PARTY OF THE | 10000        | 10000                   | 10000000000                             |   | 1000100000                       | 00000000        | 1003000  | 1000000000   | 10000             |
|  | 1000            | 1010000000000000   | RECORDER OF   | RECORDER.                | ж. – | RECEIPTION OF THE PARTY OF THE | 100000       | 10000                   | 100000000000                            |   | 1000000000                       | -               | KINDON   | 40000000000  | 10000             |
| ************   | ROOM.           | ADDRESS AND ADDRESS ADDRES   | REAL PROPERTY.  | REAL PROPERTY.           | х.   | ADDRESS OF A  | KADAGER.     | NAMES OF TAXABLE PARTY. | ******                                  |   | REPRESENTATION OF TAXABLE PARTY. | COLUMN AND A    | EXCLUSION.   | ********   | Sec. 1            |
| FARALLA STATES OF STATES O | NOTES:          | CONCERNMENTS IN CONCERNMENTS   | CONTRACTOR OF STREET, | RADIAL CONTRACTOR        | ж. – | TAXABLE PARTY   | 10000        | ALCO N.                 | ********                                |   | STATISTICS.                      | 00000000        | ADDRESS.   | TAXABLE PARTY IN CONTRACTOR  | STATES.           |
|  | 1000            | CONTRACTOR OF THE  | 00000000  | 000000000                | ж.   | KENNERS AND A DESCRIPTION OF  | KONDOX.      | KIND OF                 | 000000000000000000000000000000000000000 |   | 1000000000                       | 100303000000    | REPORT OF  | EXCOLUTION.  | 10000             |
| 100000000000000000000000000000000000000  | ADDR.           | 600000000000000  | RECORDER N  | 1000000000               | н.   | RECORDERED.   | ADDRESS.     | KROOM                   | *****                                   | 000000000000000000000000000000000000000   | 10001200008                      | 100000000       | 1003000  | 4000000000   | 10000             |
|  | KOUGH.          | ALCONDUCTION OF THE PARTY OF TH | 60000000  | 100000000                | ж. – | RECEIPTION AND ADDRESS OF   | KILDER.      | 10000                   | 0000000000                              |   | *****                            | 100300000000    | REPORT OF  | RECOVERED A  | ACCOUNT.          |
| ******   | 10103           | AND ADDRESS OF ADDRESS | CONTRACTOR OF STREET, | RECEIPTION OF            | κ.   | KOLEODADCH  | 10000        | ALC: N T                | *********                               |   | ADDRESS OF ADDRESS               | 000000000       | NAMES IN   | ADDRESS OF TAXABLE PARTY OF TAXABLE PART | 101003            |
|  | 1000            | 100000000000000000000000000000000000000  | £10000003   | 100000000                | 8    | 10000000  | 100008       | KOOK .                  | 1000000000                              |   | *****                            | 100000000       | ADDRESS OF   | 100000000  | 10000             |
| otals:   |                 |  |   |                          |      |   | 590.238      | 650.084                 |   |   |                                  |                 |  |  |                   |
|  |                 |  |   |                          |      | View De   | tai          | CSV                     |   |   |                                  |                 |  |  |                   |

Clicking on a Measure Detail to select it and then clicking on the "View Detail" button or double clicking on a Measure Detail will navigate to the Measure Detail tab for the selected Measure Detail. See "<u>View Measure Detail</u>" on page 34.

- Clicking on the "CSV" button will generate a CSV file containing the current search results for view or download. See "<u>CSV Download</u>" on page 57.
- <u>Reset</u>:
  - The Search Criteria section will be reset to its initial state. The As Of Date field will be set to the current date and the rest of the fields will be cleared. If the Search fields are not reset, the previously entered search parameters are retained for the next Search.

|     | Energy Ef              | ficiency   | Measure               | Database        |                   |   |
|-----|------------------------|------------|-----------------------|-----------------|-------------------|---|
| Sea |                        |            |                       |                 |                   |   |
|     | Search Criteria        |            |                       |                 |                   |   |
| IΓ  | As Of Date:            | 12/11/2014 | Retail Customer Name: | Program Name:   | Market Month:     |   |
|     | ISO Measure Detail ID: |            | Asset ID:             | Reference Code: | Min Installation: | • |
|     | Lead Participant:      | ~          | Resource ID:          | City:           | Max Installation: |   |
|     | LP Measure Detail ID:  |            | Load Zone ID:         | State:          | Min Expiration:   |   |
|     | Sector/End Use:        | *          |                       |                 | Max Expiration:   |   |
|     |                        |            |                       | Search Reset    |                   |   |

### 2.2.4 View Measure Detail

This section covers the process of viewing Measure Details.

- Roles that can perform this task:
  - o External EEM Maintainer
  - External EEM Viewer
- 1. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 2. The application opens to the Search page by default:

|                     | etail Pr  |                         |                      |                          |      |                      |              |              |                |              |            |                 |                      |                            |                 |
|---------------------|---|-------------------------|----------------------|--------------------------|------|----------------------|--------------|--------------|----------------|--------------|------------|-----------------|----------------------|----------------------------|-----------------|
| earch Criteria      |   |                         |                      |                          |      |                      |              |              |                |              |            |                 |                      |                            |                 |
| As Of               | Date  | 12/11/2014              | Retail Cu            | stomer Nam               | e.   |                      |              | Pro          | gram Name:     |              |            | M               | arket Month          |                            |                 |
| 100                 | Dutte   | 12,11,2011              |                      | sconer num               |      |                      | _            |              | grammanic.     |              |            |                 |                      | ·                          |                 |
| ISO Measure Det     | ail ID:   |                         | 1                    | Asset I                  | D:   |                      |              | Refe         | erence Code:   |              |            | Min             | Installation         |                            |                 |
| Lead Partic         | ipant:  | ~                       |                      | Resource I               | D:   |                      |              |              | City:          |              |            | Max             | Installation:        |                            |                 |
|                     |   |                         |                      |                          |      |                      | _            |              |                |              |            |                 | and an an and a late |                            |                 |
| LP Measure Det      | ail ID:   |                         | 1                    | Load Zone I              | 0:   |                      |              |              | State:         |              |            | Mi              | in Expiration:       |                            |                 |
| Sector/En           | d Use:  | ~                       |                      |                          |      |                      |              |              |                |              |            | Ma              | x Expiration:        |                            |                 |
| ad                  | Measu   | Measure                 | Installation         | First Month              | 116- | Measure Expi         | Summer       | Winter       | Land Transform | D            | Arrest(TD) | Program         | Feddlar              | Retail                     | Pendi           |
| ad<br>rticipant(ID) | Measu<br>Detail   | Measure<br>Detail Name  | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendir<br>Chang |
| ad<br>rticipant(ID) | Measu<br>Detail   | Measure<br>Detail Name  | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>rticipant(ID) | Measu<br>Detail   | Measure<br>Detail Name  | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>rticipant(ID) | Measu<br>Detail   | Measure<br>Detail Name  | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>rticipant(ID) | Measu<br>Detail   | Measure<br>Detail Name  | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>rticipant(ID) | Measu<br>Detail   | Measure<br>Detail Name  | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>rticipant(ID) | Measu<br>Detail   | Measure<br>Detail Name  | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter       | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>rticipant(ID) | Measu<br>Detail   | Measure     Detail Name | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter       | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>rticipant(ID) | Measu<br>Detail   | Measure     Detail Name | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer<br>kW | Winter       | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi           |
| ad<br>ticipant(ID)  | Measu<br>Detail   | Measure     Detail Name | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer<br>kW | Winter       | Load Zone(IC   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>tricipant(ID) | Measu<br>Detail<br>8000<br>8000<br>8000<br>8000<br>8000<br>8000<br>8000<br>80 | Measure     Detail Name | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer<br>kW | Winter       | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>ticpant(ID)   | Measu<br>Detail<br>8000<br>8000<br>8000<br>8000<br>8000<br>8000<br>8000<br>80 | Measure     Detail Name | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer<br>kW | Winter       | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>(ID)          | Measu<br>Detail<br>8000<br>8000<br>8000<br>8000<br>8000<br>8000<br>8000<br>80 | Measure     Detail Name | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer<br>kW | Winter       | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>tricipant(ID) | Measu<br>Detail<br>88888<br>88888<br>88888<br>88888<br>88888<br>88888<br>8888 | Measure     Detail Name | Installation<br>Date | First Month<br>in Market | Life | Measure Expl         | Summer<br>kW | Winter       | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendi<br>Chan   |
| ad<br>tridopant(ID) | Measu<br>Detail<br>XXXXX<br>XXXXX<br>XXXXX<br>XXXXX<br>XXXXX<br>XXXXX<br>XXXX | Measure     Detail Name | Installation         | First Month<br>in Market | Life | Measure Expl         | Summer<br>kW | 650.084      | Load Zone(ID   | Resource(ID) | Asset(ID)  | Program<br>Name | End Use              | Retail<br>Customer<br>Name | Pendir          |

3. Click on a Measure Detail in the Search Results section to select it and then click on the "View Detail" button OR double click on a Measure Detail. This will navigate to the Measure Detail tab for the selected Measure Detail:

| aa measure Detair – Pehuli |   |                          |   |
|----------------------------|---|--------------------------|---|
| ire Detail Pending         | History                                 |                          |   |
| asic                       |   | CAMS Fields              |   |
| Lead Participant           | ×                                       | Measure:                 | *                                       |
| ISO Measure Detail ID      |   | Asset:                   | 800000000000000000000000000000000000000 |
| LP Measure Detail ID       |   | Resource:                | 100000000000000000000000000000000000000 |
| Measure Detail Name        |   | Load Zone:               |   |
| Distribution Company       |   | Retail Customer          |   |
| Installation Date          |   | Retail Customer Name:    | ******************************          |
| First Month in Market      |   | Street:                  |   |
| Measure Life (yrs)         |   | City:                    | 000000000000000000000000000000000000000 |
| leasure Expiration Date    | (11111111111111111111111111111111111111 | State:                   | ••••••                                  |
| Program Name               |   | Zip:                     |   |
| Sector/End Uses            | •                                       | Reference Documentation  |   |
| Custom End Uses            |   | Reference Document Name: |   |
| Aggregation                | ×                                       | Measure Reference Code:  |   |
| Number of Aggregation      |   | Misc                     |   |
| Monthly kW Summer          |   | Date Updated:            |   |
| Monthly kW Winter          |   | Updated By:              |   |
|                            |   | Comments:                |   |

# 4. When accessing this page from the Search Results screen, the version of the Measure Detail displayed will be the version that was selected in the Search Results; i.e., <u>if a search was done with an As Of Date in the past, the version that was effective on that date will be displayed.</u>

- 5. When accessing this page after adding or updating a Measure Detail, the version of the Measure Detail displayed will be the version that was just created or updated.
- 6. The "Edit" button is only available to users with the External EEM Maintainer role.
- 7. The "Edit" button is only available when viewing the most recent version of the Measure Detail.
- 8. Clicking the "Edit" button will make the fields editable for update. See "<u>Update Measure</u> <u>Detail</u>" on page 40.



### **IMPORTANT**

External EEM users can only view data for Measure Details for which they are the Lead Participant. This means the CAMS Measure to which the Measure Detail is associated is mapped to an Asset which is mapped to a Resource for which the logged in user's company is the Lead Participant.

## 2.2.5 View Measure Detail History

This section covers the process of viewing the history for a Measure Detail.

- Roles that can perform this task:
  - o External EEM Maintainer
  - o External EEM Viewer
- 1. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 2. The application opens to the Search page by default:

| As of Date: 12/11/2014 3 As of Date: 12/11/2014 3 Asset ID: Asset        |                        |  | 12                       |                      |                          |      |                      |              |              |                  |             |            |                 |               |                            |                   |   |
|--|------------------------|--|--------------------------|----------------------|--------------------------|------|----------------------|--------------|--------------|------------------|-------------|------------|-----------------|---------------|----------------------------|-------------------|---|
| As of Date: 12/11/2014  Asset ID: As       | iearch Criteria        |  |                          |                      |                          |      |                      |              |              |                  |             |            |                 |               |                            |                   |   |
| ISO Measure Detail ID:   Lead Participant:     Lead Participant:     IP Measure Detail ID:     Load Zone ID:     Sector/End Use:   | As Of I                | Date:  | 12/11/2014               | Retail Cu            | stomer Nam               | e:   |                      |              | Pro          | gram Name:       |             |            | Ma              | arket Month:  |                            |                   | C |
| Led Participant:<br>IP Heasure Letail ID:<br>Sector/End Use:<br>Hack Installation:<br>Sector/End Use:<br>Hack Expiration:<br>Hack Ex | ISO Measure Deta       |  |                          | 1                    | Asset I                  | D.   |                      | _            | Refe         | erence Code:     |             |            | Min             | Installation  |                            |                   | E |
| Lead Participant: <ul> <li>IP Measure Detail ID:</li> <li>Load Zone ID:</li> <li>State:</li> <li>Max Expiration:</li> <li>Max Expiration:</li> </ul> Sector/End Use: <ul> <li>Sector/End Use:</li> <li>Max Expiration:</li> </ul> Sector/End Use: <ul> <li>Sector/End Use:</li> <li>Reset</li> </ul> Control Results <ul> <li>Sector Measure</li> <li>Detail Mame</li> <li>Installation:</li> <li>Installati</li></ul>  | 150 measure beta       |  |                          |                      | Assects                  | -    |                      | _            | Ren          | irence coue.     |             |            |                 | Instantion.   |                            |                   |   |
| LP Measure Detail ID:  | Lead Particip          | pant:  | *                        |                      | Resource I               | D:   |                      |              |              | City:            |             |            | Max             | Installation: |                            |                   | Ľ |
| Sector/End Use:       Image: Control of the sector of the se   | LP Measure Deta        | il ID:   |                          |                      | Load Zone I              | D:   |                      |              |              | State:           |             |            | Mi              | n Expiration: |                            |                   | E |
| Sector/End Use:     Max Expiration:   Sector / End Use:       Sector / End Use:     Measure Expiration:   Sector / End Use:       Measure Expiration:     Rectal   Sector / End Use:       Measure Expiration:     Name   End Use:       Rectal   Sector / End Use:       Measure Expiration:     Name   End Use:       Rectal   End Use:       Name     Installation   End Use:       Sector / End Use:     Measure Expiration:   End Use:       Sector / End Use:   End Use: <th< td=""><td></td><td>L</td><td>1</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></th<>  |                        | L  | 1                        |                      |                          |      |                      |              |              |                  |             |            |                 |               |                            |                   |   |
| Search       Reset         Search Results         add market       Installation       First Month       Life       Measure Expl       Summer       Load Zone(LC       Resource(LD)       Asset(LD)       Program       End Use       Retaid       Customer       Prodram       End Use       Retaid       Prodram       End Use       Retaid       Program       End Use       Program       End Use       Retaid       Program       End Use       End Use <td>Sector/End</td> <td>Use:</td> <td></td> <td>Ma</td> <td>x Expiration:</td> <td></td> <td></td> <td>L</td>   | Sector/End             | Use:   |                          |                      |                          |      |                      |              |              |                  |             |            | Ma              | x Expiration: |                            |                   | L |
| NUMBER     NUMBER <th>ad<br/>articipant(ID)</th> <th>Measu<br/>Detail</th> <th>Measure<br/>Detail Name</th> <th>Installation<br/>Date</th> <th>First Month<br/>in Market</th> <th>Life</th> <th>Measure Expi<br/>Date</th> <th>Summer<br/>kW</th> <th>Winter<br/>kW</th> <th>Load Zone(IC Re</th> <th>source(ID)</th> <th>Asset(ID)</th> <th>Program<br/>Name</th> <th>End Use</th> <th>Retail<br/>Customer<br/>Name</th> <th>Pending<br/>Change</th> <th></th>  | ad<br>articipant(ID)   | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(IC Re  | source(ID)  | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
| $ \begin{tabular}{  c c c c c c c c c c c c c c c c c c $  | ad<br>articipant(ID)   | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Exp<br>Date  | Summer<br>kW | Winter<br>kW | Load Zone(IC Re  | source(ID)  | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
| $ \frac{1}{1} = 1 + 1 + 1 + 1 + 1 + 1 + 1 + 1 + 1 + 1$   | ead<br>articipant(ID)  | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(ID Re  | source(ID)  | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
|  | ad<br>articipant(ID)   | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(IC Re  | source(ID)  | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
|  | ad<br>articipant(ID)   | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(IC Re  | source(ID)  | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
| $ \begin{array}{                                    $  | ead<br>articipant(ID)  | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(IC Re  | :source(ID) | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
|  | tad<br>articipant(ID)  | Measu<br>Detail  | , Measure<br>Detail Name | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer<br>kW | Winter<br>kW | Load Zone(ID Re  | :source(ID) | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
|  | tad<br>articipant(ID)  | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(ID Re  | :source(ID) | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change | 1 |
|  | ead<br>articipant(ID)  | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi<br>Date | Summer<br>kW | Winter<br>kW | Load Zone(IC Re  | :source(ID) | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
|  | ead<br>articipant(ID)  | Measu<br>Detail  | Measure<br>Detai Name    | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer<br>kW | Winter       | Load Zone(IC Re  | :source(ID) | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
|  | ead<br>articipant(ID)  | Measu<br>Detail  | Measure<br>DetailName    | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer<br>kW | Winter<br>kW | Load Zone(IC Re  | esource(ID) | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
|  | ead<br>articipant(ID)  | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer       | Winter       | Load Zone(IC Re  | :source(ID) | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
|  | ead<br>articipant(ID)  | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer<br>kW | Winter       | Load Zone(IIC Re | :source(ID) | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending<br>Change |   |
| tale- 500 238, 600 084   | zad<br>artricipant(ID) | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer       | Winter       | Load Zone(IC Re  | source(ID)  | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending           |   |
| stale: 590.238 650.084   | ead<br>articipant(ID)  | Measu<br>Detail<br>2005<br>2005<br>2005<br>2005<br>2005<br>2005<br>2005<br>200 | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expi         | Summer       | Winter       | Load Zone(ID Re  | :source(ID) | Asset([D)) | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending           |   |
| 550125 050101  | rad<br>rriricipant(ID) | Measu<br>Detail  | Measure<br>Detail Name   | Installation<br>Date | First Month<br>in Market | Life | Measure Expl<br>Date | Summer       | Winter<br>kw | Load Zone(IC Re  | :source(ID) | Asset(ID)  | Program<br>Name | End Use       | Retail<br>Customer<br>Name | Pending           |   |

3. Click on a Measure Detail in the Search Results section to select it and then click on the "View Detail" button OR double click on a Measure Detail. This will navigate to the Measure Detail tab for the selected Measure Detail. Click on the History tab:

| Energy Effic                      | ciency Measure | Database                 |  |
|-----------------------------------|----------------|--------------------------|--|
| Search Add Measure Detail Pending |                |                          |  |
| Measure Detail Pending            | History        |                          |  |
| Basic                             |                | CAMS Fields              |  |
| Lead Participant:                 | ······         | Measure:                 | ×                                      |
| ISO Measure Detail ID:            |                | Asset:                   |  |
| LP Measure Detail ID:             |                | Resource:                |  |
| Measure Detail Name:              |                | Load Zone:               |  |
| Distribution Company:             |                | Retail Customer          |  |
| Installation Date:                |                | Retail Customer Name:    |  |
| First Month in Market:            |                | Street:                  |  |
| Measure Life (yrs):               |                | City:                    |  |
| Measure Expiration Date:          | (              | State:                   | ************************************** |
| Program Name:                     |                | Zip:                     |  |
| Sector/End Use:                   | ······         | Reference Documentation  |  |
| Custom End Use:                   |                | Reference Document Name: |  |
| Aggregation:                      | •              | Measure Reference Code:  |  |
| Number of Aggregation:            |                | Misc                     |  |
| Monthly kW Summer:                |                | Date Updated:            | ••••••••••••••••••••••••••••••••       |
| Monthly kW Winter:                |                | Updated By:              |  |
|                                   |                | Comments:                |  |
|                                   |                |                          |  |
|                                   |                |                          |  |
|                                   |                |                          | Edit                                   |

4. This will display the history for the Measure Detail:

| En                 | ergy E             | fficien         | cy M      | easu                    | re Database                            |                      |                          |        |                          |           |           |   |                 |          | Exter                      | ai EEM M          | antaner 2, EEM (999999508)                |
|--------------------|--------------------|-----------------|-----------|-------------------------|--|----------------------|--------------------------|--------|--------------------------|-----------|-----------|---|-----------------|----------|----------------------------|-------------------|---|
|                    |                    |                 |           |                         |  |                      |                          |        |                          |           |           |   |                 |          |                            |                   |   |
| Meas               | ure Detail Pend    | ing History     |           |                         |  |                      |                          |        |                          |           |           |   |                 |          |                            |                   |   |
| Meas               | ire Detail History |                 |           |                         |  |                      |                          |        |                          |           |           |   |                 |          |                            |                   |   |
| Measur<br>Detail I | Record Begin Date  | Record End Date | Status    | LP Measure<br>Detail ID | Measure<br>Detail Name                 | Installation<br>Date | First Month<br>in Market | Life   | Measure<br>Expiration Da | Summer kW | Winter kW | Measure (ID)                            | Program<br>Name | End Use  | Retail<br>Customer<br>Name | Aggregal<br>Count | Updated<br>By                             |
| 10000              | 12/11/2014         |                 | 10000000  | 100000000               | X0000000000000000000000000000000000000 | 10000000             | 10000000                 | 100000 | 10000000                 | 0000000   | 10000000  | 1000000000000000                        | 10000000        | 10000000 | 10000000                   | 00000             | EEM External EEM Maintainer 2 (999999508) |
| 100000             | 12/07/2014         | 12/11/2014      | 100000000 | 10000000                | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 10000000             | 10000000                 | 100000 | 10000000                 | 100000000 | 100000000 | 1000000000000000                        | 100000000       | 10000000 | 10000000                   | 00000             | EEM External EEM Maintainer 2 (999999508) |
| 300008             | 11/07/2014         | 12/07/2014      | 10000000  | 100000000               |  | 10000000             | 10000000                 | 100000 | 10000000                 | 100000000 | 100000000 | 100000000000000000000000000000000000000 | 10000000        | 10000000 | 10000000                   | 00000             | EEM ISO EEM Maintainer (999999501)        |
|                    |                    |                 |           |                         |  |                      |                          |        |                          |           |           |   |                 |          |                            |                   |   |

- 5. The Measure Detail versions are sorted by Record Begin Date in descending order (newest version first).
- 6. The following columns are present in the history view:
  - Measure Detail ID
  - Record Begin Date
  - Record End Date
  - Status
  - LP Measure Detail ID
  - Measure Detail Name
  - Installation Date
  - First Month in Market
  - Measure Life
  - Measure Expiration Date

- Summer kW
- Winter kW
- CAMS Measure Name (ID)
- Program Name
- End Use
- Retail Customer Name
- Aggregation Count
- Updated By
- 7. Each column of the History display may be Sorted in Ascending or Descending order by clicking on the arrow that appears in the left of the column header if the mouse cursor is moved over it:

| E            | ne          | rgy Ei            | ficien          | cy M      | easu                   | re Data                | base                                    |                      |                          |        |                          |           |           |   |                 |           | Exter                      | nal EEM M         | tantainer 2, EEM (999999508)              |
|--------------|-------------|-------------------|-----------------|-----------|------------------------|------------------------|---|----------------------|--------------------------|--------|--------------------------|-----------|-----------|---|-----------------|-----------|----------------------------|-------------------|---|
|              |             |                   |                 |           |                        |                        |   |                      |                          |        |                          |           |           |   |                 |           |                            |                   |   |
| Me           | isure       | Detail 🎽 Pendi    | ng History      |           |                        |                        |   |                      |                          |        |                          |           |           |   |                 |           |                            |                   |   |
| Mea          | sure        | Detail History    |                 | _         |                        |                        |   |                      | _                        |        |                          |           |           |   |                 |           |                            | _                 |   |
| Meas<br>Deta | ure<br>I ID | Lecord Begin Date | Record End Date | Status    | LP Measur<br>Detail ID | Measure<br>Detail Name |   | Installation<br>Date | First Month<br>in Market | Life   | Measure<br>Expiration Da | Summer kW | Winter kW | Measure (ID)                            | Program<br>Name | End Use   | Retail<br>Customer<br>Name | Aggregat<br>Count | Updated<br>By                             |
| 1000         | 00 1        | 2/11/2014         |                 | 10000000  | 1000000                | 1 Sort Ascending       | 100000000000000000000000000000000000000 | 10000000             | 10000000                 | 100000 | 10000000                 | 10000000  | 10000000  | 100000000000000000000000000000000000000 | 10000000        | 100000000 | 10000000                   | 100000            | EEM External EEM Maintainer 2 (999999508) |
| 1000         | 00 1        | 12/07/2014        | 12/11/2014      | 100000000 | X0000000 Z             | 1 Sort Descendion      | 20000000000000000000000                 | 10000000             | 10000000                 | 100000 | 10000000                 | 10000000  | 100000000 | 100000000000000                         | 10000000        | 100000000 | 100000000                  | 100000            | EEM External EEM Maintainer 2 (999999508) |
| 1000         | 00 :        | 1/07/2014         | 12/07/2014      | 100000000 | 10000000               | , surrounding          | 10000000000000000                       | 10000000             | 10000000                 | 100000 | 10000000                 | 10000000  | 10000000  | 1000000000000000                        | 10000000        | 100000000 | 100000000                  | 100000            | EEM ISO EEM Maintainer (999999501)        |
|              |             |                   |                 |           | a                      | 🔝 Columns 🕨            |   |                      |                          |        |                          |           |           |   |                 |           |                            |                   |   |
|              |             |                   |                 |           |                        |                        |   |                      |                          |        |                          |           |           |   |                 |           |                            |                   |   |

8. Columns may be added or removed from the History display by moving the mouse cursor over the Columns menu item and selecting one or more columns by clicking in the box next to the column name:

| Energy Efficiency Measure Data   | base   | External EEM Maintainer 2, EEM (999999508)<br>NSTAR Electric Company (3) |
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| 132 11/07/2014 12/03/2014 CURRENT Job_2013   | ), Al Elec, Ol & Prop units + M 06/01/2013 08/01/2014 25 05/01/2038 0.01 2.738 NSTAR SEMA (33385)  | A02a Resi HVAC N/A 108 EEM ISO EEM Maintainer (999999501)                |
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## 2.2.6 Update Measure Detail

This section covers the process of updating a Measure Detail.

- ✤ Role that can perform this task:
  - o External EEM Maintainer

#### 2.2.6.1 Manual Entry

- 1. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 2. The application opens to the Search page by default:

| Search Criteria         Program Name:       Market Month   |                       |  |  |  |  |   |  |   |  |   |              |  |   |  |   |  |
|--|-----------------------|--|--|--|--|---|--|---|--|---|--------------|--|---|--|---|--|
| As of Date       12/11/2014       Retail Customer Hame       Program Hame       Image: Control of the co  | Search Criteria       |  |  |  |  |   |  |   |  |   |              |  |   |  |   |  |
| 150 Heasure Detail ID:       Asset ID:       Reference Code:       Hin Installation:       Hin Installation:         Lead Participant:       Image: City:       Image: City   | As Of                 | Date:  | 12/11/2014   | Retail Cu  | stomer Nam   | e:  |  |   | Pro  | gram Name:  |              |  | Ma  | arket Month:   |   |  |
| Lead Participant: <ul> <li>City:</li> <li>Max Installation:</li> <li>Installation:</li> <li>State:</li> <li>Min Expiration:</li> <li>Max Expiration:</li> </ul> Search Result Search Result Search Result Search Result Resul  | ISO Measure Det       | ail ID:  |  |  | Asset I  | D:  |  |   | Refe   | rence Code:   |              |  | Min   | Installation:  |   |  |
| Lead Participant: <ul> <li>Kessource LJ:</li> <li>Load Zone ID:</li> <li>State:</li> <li>Min Expiration:</li> <li>Max Expiration:</li> </ul> Sector/End Use: <ul> <li>Sector</li> <li>Reset</li> </ul> Sector/End Use: <ul> <li>Max Expiration:</li> <li>Max Expiration:</li> <li>Max Expiration:</li> </ul> Sector/End Use: <ul> <li>Max Expiration:</li> <li>Sector Reset</li> </ul>   |                       | i  |  |  |  |   |  |   |  | ~   |              |  |   |  |   |  |
| LP Heasure Detail ID:       Load Zone ID:       State:       Min Expiration:         Sector/End Use:       •   | Lead Partic           | ipant:   | <b>`</b>   |  | Resource I   | D:  |  |   |  | City:   |              |  | мах   | Installation:  |   |  |
| Sector/End Use:       Max Expiration:         Sector/End Use:         Sector/End Use:       Reset         Sector/End Use:       Name       Information for Shorth numere to the sector of the sector   | LP Measure Det        | ail ID:  |  |  | Load Zone I  | D:  |  |   |  | State:  |              |  | Mi  | n Expiration:  |   |  |
| Search Results  Lead Participant(ID) Measure Detail Name Installation First Month Ufe Measure Expl Date VWW Load Zone(IC Resource(ID) Asset(ID) Program End Use Retail Customer Change   | Sector/En             | d Use:   | *  |  |  |   |  |   |  |   |              |  | Ма  | x Expiration:  |   |  |
| Search       Reset    Scarch Results          Search       Weasure (D)       Measure (D)       Measure (D)       Measure (D)       Installation (D)   |                       |  |  |  |  |   | _  |   |  |   |              |  |   |  |   |  |
| scarch Results   |                       |  |  |  |  |   |  |   |  |   |              |  |   |  |   |  |
| Measure<br>Participant(ID)       Measure<br>Detail Name       Installation       First Month<br>In Market       Life       Measure Exp<br>Date       Summer<br>KWW       Winter       Load Zone(ID       Resource(ID)       Asset(ID)       Program<br>Name       End Use       Retail<br>Customer       Pending   | Search Results        |  |  |  |  |   |  |   |  |   |              |  |   |  |   |  |
| Casa       Detail       Processing       <  |                       |  | Manager  | Testellettes   | Track Marsh  |   | Married  | 0   |  |   |              |  | Deserves  |  | Retail  | Deadlard   |
|  | ead<br>articipant(ID) | Detail   | Detail Name  | Date   | in Market  | Life  | Date Date  | kW  | kW   | Load Zone(ID  | Resource(ID) | Asset(ID)  | Name  | End Use  | Customer  | Change   |
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3. Click on a Measure Detail in the Search Results section to select it and then click on the "View Detail" button OR double click on a Measure Detail. This will navigate to the Measure Detail tab for the selected Measure Detail:

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| Measure Detail Pending History    |                          |   |      |
| Basic                             | CAMS Fields              |   |      |
| Lead Participant:                 | Measure:                 | •••••••                                 |      |
| ISO Measure Detail ID:            | Asset:                   |   |      |
| LP Measure Detail ID:             | Resource:                |   |      |
| Measure Detail Name:              | Load Zone:               |   |      |
| Distribution Company:             | Retail Customer          |   |      |
| Installation Date:                | Retail Customer Name:    |   |      |
| First Month in Market:            | Street:                  |   |      |
| Measure Life (yrs):               | City:                    |   |      |
| Measure Expiration Date:          | State:                   | ■ 1000000000000000000000000000000000000 |      |
| Program Name:                     | Zip:                     |   |      |
| Sector/End Use:                   | Reference Documentation  |   |      |
| Custom End Use:                   | Reference Document Name: |   |      |
| Aggregation:                      | Measure Reference Code:  |   |      |
| Number of Aggregation:            | Misc                     |   |      |
| Monthly kW Summer:                | Date Updated:            |   |      |
| Monthly kW Winter:                | Updated By:              |   |      |
|                                   | Comments:                |   |      |
|                                   |                          |   |      |
|                                   |                          |   | Edit |

4. Click the "Edit" button to make the fields editable for update:

| Energy Effi                       | ciency Measure D                        | )atabase                 |   |              |
|-----------------------------------|---|--------------------------|---|--------------|
| Search Add Measure Detail Pending |   |                          |   |              |
| Measure Detail Pending            | History                                 |                          |   |              |
| Basic                             |   | CAMS Fields              |   |              |
| Lead Participant:                 | ······                                  | Measure:                 | 1000000000000 ~                         |              |
| ISO Measure Detail ID:            |   | Asset:                   | ******                                  |              |
| LP Measure Detail ID:             | 100000000000000000000000000000000000000 | Resource:                |   |              |
| Measure Detail Name:              | 100000000000000000000000000000000000000 | Load Zone:               |   |              |
| Distribution Company:             | ***********************************     | Retail Customer          |   |              |
| Installation Date:                | 20000000000000                          | Retail Customer Name:    | X0000000000000000000000000000000000000  |              |
| First Month in Market:            |   | Street:                  | 000000000000000000000000000000000000000 |              |
| Measure Life (yrs):               |   | City:                    | x0000000000000000000000000000000000000  |              |
| Measure Expiration Date:          |   | State:                   | ~                                       |              |
| Program Name:                     | ************************************    | Zip:                     | x0000000000000000000000000000000000000  |              |
| Sector/End Use:                   | 8000000000000000                        | Reference Documentation  |   |              |
| Custom End Use:                   |   | Reference Document Name: | x0000000000000000000000000000000000000  |              |
| Aggregation:                      | 200000000000000000000000000000000000000 | Measure Reference Code:  | x0000000000000000000000000000000000000  |              |
| Number of Aggregation:            | 000000000000000000000000000000000000000 | Misc                     |   |              |
| Monthly kW Summer:                | 000000000000000000000000000000000000000 | Date Updated:            |   |              |
| Monthly kW Winter:                | 3000000000000000                        | Updated By:              |   |              |
|                                   |   | Comments:                |   |              |
|                                   |   |                          |   |              |
|                                   |   |                          |   |              |
|                                   |   |                          | S                                       | ubmit Cancel |

5. Field data is available for updates based on following rules and validations:

#### Basic

- <u>Lead Participant</u>: Not editable. Displays Customer Name and ID for logged in external user.
- **ISO Measure Detail ID**: Not editable. Each ISO Measure Detail ID is unique throughout the EEM database system.
- **LP Measure Detail ID**: Must be unique to the Lead Participant. Company created unique identifier for the Measure Detail. Alphanumeric values accepted. Since the search will return partial matches based on the search string, the LP database administrator must select the format for the creation of this field as well as the search string required for any Measure Detail. Limited to 100 characters.
- <u>Measure Detail Name</u>: Alphanumeric values accepted. Limited to 100 characters.
- **Distribution Company**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Only numeric values accepted.
- **Installation Date**: Must be a valid date in MM/DD/YYYY format. If being modified for a Measure Detail that is "Closed" (see "<u>Measure Detail Modification State</u>" on page 16), a Comment is required to be entered in the "Comments" field and the Measure Detail will be moved to Pending (see "<u>ISO Approval Process/Pending Measure Detail Records</u>" on page 16). It will require ISO approval before the change is applied.
- **<u>First Month in Market</u>**: Not editable. System generated using Installation Date and system date. See "<u>First Month in Market/Measure Expiration Date</u>" on page 16.
- <u>Measure Life (yrs)</u>: Must be numeric, with at most one decimal place. Cannot be greater than ISO defined maximum (currently 30 years). If being modified for a Measure Detail that is "Closed" (see "<u>Measure Detail Modification State</u>" on page 16), a Comment is required to be entered in the "Comments" field and the Measure Detail will be moved to Pending (see "<u>ISO Approval Process/Pending Measure Detail Records</u>" on page 16). It will require ISO approval before the change is applied.
- <u>Measure Expiration Date</u>: Not editable. System generated using Installation Date and Measure Life (yrs). See "<u>First Month in Market/Measure Expiration Date</u>" on page 16.
- **<u>Program Name</u>**: Alphanumeric values accepted. Limited to 100 characters.
- <u>Sector/End Use</u>: Value chosen from drop-down list. See Table 3: <u>Sectors/End Uses</u> on page 69 for a list of Sectors and End Uses.
- <u>**Custom End Use</u>**: Required if a "Custom Measures" option is chosen for Sector/End Use. Limited to 100 characters.</u>
- **<u>Aggregation</u>**: Limited to 'Y' and 'N'. Defaults to 'N'.
- **<u>Number of Aggregation</u>**: Only editable if Aggregation value is 'Y'. Must be greater than zero. Defaults to 1 if Aggregation = N. Rounds to the nearest whole number using standard rounding rules. Limited to seven digits.
- <u>Monthly kW Summer</u>: Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Entered value is rounded to three decimal places using standard rounding rules. If being modified for a Measure Detail that is "Closed" (see "<u>Measure Detail Modification State</u>" on page 16), a Comment is required to be entered in the "Comments" field and the Measure Detail will be moved to Pending (see "<u>ISO Approval Process/Pending</u>

<u>Measure Detail Records</u>" on page 16). It will require ISO approval before the change is applied.

• <u>Monthly kW Winter</u>: Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Entered value is rounded to three decimal places using standard rounding rules. If being modified for a Measure Detail that is "Closed" (see "<u>Measure Detail Modification State</u>" on page 16), a Comment is required to be entered in the "Comments" field and the Measure Detail will be moved to Pending (see "<u>ISO Approval Process/Pending Measure Detail Records</u>" on page 16). It will require ISO Approval before the change is applied.

#### **CAMS Fields**

- <u>Measure</u>: Required. Value chosen from a drop-down list. If being modified for a Measure Detail that is "Closed" (see "<u>Measure Detail Modification State</u>" on page 16), a Comment is required to be entered in the "Comments" field and the Measure Detail will be moved to Pending (see "<u>ISO Approval Process/Pending Measure Detail Records</u>" on page 16). It will require ISO approval before the change is applied.
- <u>Asset</u>: Not editable. System generated based on value chosen in Measure dropdown list.
- **<u>Resource</u>**: Not editable. System generated based on value chosen in Measure dropdown list.
- **Load Zone**: Not editable. System generated based on value chosen in Measure drop-down list.

#### **Retail Customer**

- **<u>Retail Customer Name</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 100 characters.
- **<u>Street</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 50 characters.
- <u>**City</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 50 characters.</u>
- **<u>State</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Limited to the six New England states. Value must be chosen from a drop-down list.
- **<u>Zip</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Must contain exactly five digits.

#### **Reference Documentation**

- **<u>Reference Document Name</u>**: Alphanumeric values accepted. Limited to 100 characters.
- <u>Measure Reference Code</u>: Alphanumeric values accepted. Limited to 100 characters.

#### Misc

• **<u>Date Updated</u>**: Not Editable. Generated by EEM using the system date and time of the Measure Detail update. See "<u>Versioning</u>" on page 15.

- **<u>Updated By</u>**: Not editable. Generated by EEM using the user name associated with the certificate of the logged in user.
- **<u>Comments</u>**: Required if the Measure Detail is "Closed" (see "<u>Measure Detail</u> <u>Modification State</u>" on page 16) and a change was made to Installation Date, Measure Life (yrs), Monthly kW Summer, Monthly kW Winter, or Measure. Limited to 4,000 characters.
- 6. Click the "Submit" or "Cancel" button.
  - <u>Submit</u>:
    - If there are validation errors, a message will be displayed asking the user to correct the indicated validation errors and try again:

| Energy Effic                      | ciency Measure D                        | Database                 |   |                    |   |
|-----------------------------------|---|--------------------------|---|--------------------|---|
| Search Add Measure Detail Pending | 9                                       |                          |   |                    |   |
| Measure Detail Pending            | History                                 |                          |   |                    |   |
| Basic                             |   | CAMS Fields              |   |                    |   |
| Lead Participant:                 | 10000000000000000000000000000000000000  | Measure:                 | 100000000000000000000000000000000000000 | × 1000000000000 ×  |   |
| ISO Measure Detail ID:            |   |                          | 100000000000000000000000000000000000000 | 0000000000000      |   |
| LP Measure Detail ID:             | x0000000000000000000000000000000000000  |                          | 100000000000000000000000000000000000000 | 0000000000000      |   |
| Measure Detail Name:              | x0000000000000000000000000000000000000  |                          | 100000000000000000000000000000000000000 | 0000000000000      |   |
| Distribution Company:             | x0000000000000000000000000000000000000  | Retail Customer          |   |                    |   |
| Installation Date:                | 12/01/2014                              | Retail Customer Name:    | x0000000000000000                       | 0000000000000      |   |
| First Month in Market:            |   | Street:                  | 100000000000000000                      | 0000000000000      |   |
| Measure Life (yrs):               | 22                                      | City:                    | 100000000000000000                      | 0000000000000      |   |
| Measure Expiration Date:          |   | State:                   | 30000000000000                          |                    |   |
| Program Name:                     |   | Zip:                     | 100000000000000000000000000000000000000 | 100000000000000    |   |
| Sector/End Use:                   | COMMERCIAL - Custom Measures (Large) 🗸  | Reference Documentation  |   | Validation         | R   |
| Custom End Use:                   | 100000000000000000000000000000000000000 | Reference Document Name: | 10000000000000                          | Validation         |   |
| Aggregation:                      | N                                       | Measure Reference Code:  | 100000000000000                         | Please correct the | indicated validation errors and try again |
| Number of Aggregation:            |   | Misc                     |   |                    | OK  |
| Monthly kW Summer:                | 33                                      | Date Updated:            |   |                    |   |
| Monthly kW Winter:                | 23                                      |                          |   |                    |   |
|                                   |   | Comments:                | 100000000000000000000000000000000000000 | 0000000000000      |   |
|                                   |   |                          |   |                    |   |
|                                   |   |                          |   |                    | Submit Cancel                             |

• If a change was made to Installation Date, Measure Life (yrs), Monthly kW Summer, Monthly kW Winter, or Measure, Measure Detail is be set to Pending and will require ISO approval before changes are applied:

| asure Detail Pending History                                 |                         |   |
|--|-------------------------|---|
| Basic  | CAMS Fields             |   |
| Lead Participant: 1000000000000000000000000000000000000      |                         | × ************************************  |
| ISO Measure Detail ID: 1000000000000000000000000000000000000 |                         | 100000000000000000000000000000000000000 |
| LP Measure Detail ID: ###################################    |                         | 000000000000000000000000000000000000000 |
| Measure Detail Name: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX    |                         | 000000000000000000000000000000000000000 |
| Distribution Company: ####################################   | Retail Customer         |   |
| Installation Date: 12/01/2010                                | Retail Customer Name:   | 800000000000000000000000000000000000000 |
| First Month in Market: 10/01/2014                            |                         | 800000000000000000000000000000000000000 |
|  |                         | x0000000000000000000000000000000000000  |
| Measure Expiration Date:                                     |                         | x000000000000 ~                         |
| Program Name: IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII           |                         | 100000000000000000000000000000000000000 |
| Sector/End Use: IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII         | Reference Documentation | Info                                    |
| Custom End Use: INCOMPANY CONTRACTOR CONTRACTOR CONTRACTOR   |                         | 100000000000000000000000000000000000000 |
| Aggregation: 1000000000000000000000000000000000              |                         | Placed insert on hold awaiting approval |
|  | Misc                    | OK                                      |
|  | Date Updated:           |   |
| Monthly kW Winter: 23  |                         | 000000000000000000000000000000000000000 |
|  |                         | 100000000000000000000000000000000000000 |
|  |                         |   |

• Otherwise, if there are no validation errors, a message will be displayed informing the user that the data was successfully updated and the user will be brought to the Measure Detail tab for the just updated Measure Detail:

| Energy Effi             | ciency Measure D                        | Database                |   |                           |
|-------------------------|---|-------------------------|---|---------------------------|
|                         |   |                         |   |                           |
| Measure Detail Pending  | History                                 |                         |   |                           |
| Basic                   |   | CAMS Fields             |   |                           |
| Lead Participant        | 800000000000000000000000000000000000000 |                         | • |                           |
| ISO Measure Detail ID   | 100000000000000000000000000000000000000 |                         | 100000000000000000000000000000000000000 |                           |
| LP Measure Detail ID    | x0000000000000000000000000000000000000  |                         | 100000000000000000000000000000000000000 |                           |
| Measure Detail Name     | 100000000000000000000000000000000000000 |                         | 100000000000000000000000000000000000000 |                           |
| Distribution Company    | x0000000000000000000000000000000000000  | Retail Customer         |   |                           |
| Installation Date       | : 12/01/2010                            |                         | 000000000000000000000000000000000000000 |                           |
| First Month in Market   | : 10/01/2014                            |                         | 100000000000000000000000000000000000000 |                           |
| Measure Life (yrs)      |   |                         | 100000000000000000000000000000000000000 |                           |
| Measure Expiration Date | ADDIDIDIDIDIDIDIDIDIDIDIDIDIDIDIDIDIDID |                         | 3000000000000000                        |                           |
| Program Name            | 300000000000000000000000000000000000000 |                         | 100000000000000000000000000000000000000 |                           |
| Sector/End Use          |   | Reference Documentation | Info                                    |                           |
| Custom End Use          | x0000000000000000000000000000000000000  |                         | 100000000000000000000000000000000000000 |                           |
| Aggregation             | 100000000000000000000000000000000000000 |                         | 10000000000000000000000000000000000000  | een successiully updated. |
| Number of Aggregation   |   | Misc                    |   | ок                        |
| Monthly kW Summer       |   |                         |   |                           |
| Monthly kW Winter       |   |                         | 100000000000000000000000000000000000000 |                           |
|                         |   |                         | 100000000000000000000000000000000000000 |                           |
|                         |   |                         |   |                           |
|                         |   |                         |   |                           |
|                         |   |                         |   | Cancel                    |

#### • <u>Cancel</u>:

• Update of Measure Detail is abandoned, the Measure Detail fields are made unavailable for update and the Measure Detail reverts back with no changes.

| ergy Effici                | ency Measure D | Database                 |   |      |
|----------------------------|----------------|--------------------------|---|------|
| Add Measure Detail Pending |                |                          |   |      |
| sure Detail Pending His    | tory           |                          |   |      |
| Basic                      |                | CAMS Fields              |   |      |
| Lead Participant:          | ······         | Measure:                 | <b>▼</b>                                |      |
| ISO Measure Detail ID:     |                | Asset:                   |   |      |
| LP Measure Detail ID:      |                | Resource:                |   |      |
| Measure Detail Name:       |                | Load Zone:               |   |      |
| Distribution Company:      |                | Retail Customer          |   |      |
| Installation Date:         |                | Retail Customer Name:    |   |      |
| First Month in Market:     |                | Street:                  | 000000000000000000000000000000000000000 |      |
| Measure Life (yrs):        |                | City:                    |   |      |
| Measure Expiration Date:   |                | State:                   | •••••••••••••••••                       |      |
| Program Name: 🦉            |                | Zip:                     |   |      |
| Sector/End Use:            | ······         | Reference Documentation  |   |      |
| Custom End Use:            |                | Reference Document Name: |   |      |
| Aggregation:               | ······         | Measure Reference Code:  |   |      |
| Number of Aggregation:     |                | Misc                     |   |      |
| Monthly kW Summer:         |                | Date Updated:            |   |      |
| Monthly kW Winter:         | 0000000000     | Updated By:              |   |      |
|                            |                | Comments:                |   |      |
|                            |                |                          |   | Edit |

#### 2.2.6.2 CSV Update

Multiple Measure Details can be updated simultaneously using the CSV Upload function. Up to 50 record revisions may be uploaded at a time.

- 1. Prepare a file in CSV format for upload. Specify values for fields in the following order using the new data to be added to EEM.
  - **<u>CAMS Measure ID</u>**: Required. This must be for an On-Peak or Seasonal Peak Measure belonging to the Lead Participant of the logged in user.
  - **Measure Detail ID**: Required. Failure to complete this field will result in a new record being created.
  - **<u>Lead Participant ID</u>**: Required. Numeric values acccepted.
  - **<u>LP Measure Detail ID</u>**: Required. This must match the original ID uploaded to EEM exactly.
  - <u>Measure Detail Name</u>: Required. Alphanumeric values accepted. Limited to 100 characters.
  - **Distribution Company ID**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Only numeric values accepted. Request the numeric code for a specific distribution company through an Ask ISO Issue.

- <u>Measure Life (yrs)</u>: Required. Must be numeric, with at most one decimal place. Cannot be greater than ISO defined maximum (currently 30 years).
- **<u>Program Name</u>**: Required. Alphanumeric values accepted. Limited to 100 characters.
- <u>Sector Type</u>: Required. See Table 3: <u>Sectors/End Uses</u> on page 69 for the full list of eligible options.
- <u>End Use Type</u>: Required. See Table 3: <u>Sectors/End Uses</u> on page 69 for the full list of eligible options.
- **<u>Custom End Use</u>**: Required if a "Custom Measures" option is chosen for End Use. Limited to 100 characters.
- **<u>Aggregation Flag</u>**: Required. Limited to 'Y' and 'N'. Yes is used when multiple end uses are aggregated into a single Measure Detail.
- **<u>Summer kW</u>**: Required. Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Entered value is rounded to three decimal places using standard rounding rules.
- <u>Winter kW</u>: Required. Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Entered value is rounded to three decimal places using standard rounding rules.
- **<u>Retail Customer Name</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 100 characters.
- **<u>Street</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 50 characters.
- <u>**City</u>**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Alphanumeric values accepted. Limited to 50 characters.</u>
- <u>State</u>: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Limited to the six New England states. Must contain exactly two letters.
- **Postal Code**: Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter is greater than or equal to 10kW. Must contain exactly five digits.
- **<u>Reference Doc Name</u>**: Required. Alphanumeric values accepted. Limited to 100 characters.
- **<u>Reference Code</u>**: Required. Alphanumeric values accepted. Limited to 100 characters.
- **<u>Comments</u>**: Optional for initial entry but required for data updates. Alphanumeric values accepted. Limited to 4,000 characters.
- <u>Installation Date</u>: Required. Must be a valid date in MM/DD/YYYY format, after June 16, 2006 the initial qualification date for the Forward Capacity Market and prior to the current system date. If more than three years prior to the current system date, the new Measure Detail will be put into Pending and will require ISO approval before being applied (see "<u>ISO Approval Process/Pending Measure Detail Records</u>" on page 16).
- <u>Aggregation Count</u>: Required. Must be '1' if Aggregation value is 'N'. Must be greater than zero. Rounds to the nearest whole number using standard rounding rules. Limited to seven digits.



#### **IMPORTANT**

- Do not include column headings in the CSV file that will be uploaded.
   Doing so will prevent the upload of data.
- When downloading a CSV of existing Measure Details from the EEM database in order to prepare an update file, be sure to adjust the column order and values to reflect the instructions outlined above.
- 2. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 3. Click on "Upload CSV" in the menu bar:



4. A blank CSV Upload Input Data screen is displayed with the column headings outlined in step 1 above.

|   | En          | ierg        | y Effi               | ciency                  | Meas                    | ure Data               | base                       |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|---|-------------|-------------|----------------------|-------------------------|-------------------------|------------------------|----------------------------|-----------------|-----------------|-------------|-----------------|-------------------|---------------------|-----------|-----------|-------------------------|-----------|---------|-------------|-----------------------|-------------------|----------|----------------------|----------------------|---|
| I | iearch      | Add N       | leasure Detai        | Upload CSV              | Pending                 |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
| Γ | csv         | Upload      | Input Data           | 8                       |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   | CAM<br>Meas | s<br>ure ID | Measure<br>Detail ID | Lead<br>Participant(ID) | LP Measure<br>Detail ID | Measure<br>Detail Name | Distribution<br>Company ID | Measure<br>Life | Program<br>Name | Sector Type | End Use<br>Type | Custom<br>End Use | Aggregation<br>Flag | Summer kW | Winter kW | Retail<br>Customer Name | treet Cit | y State | Postal Code | Reference<br>Doc Name | Reference<br>Code | Comments | Installation<br>Date | Aggregation<br>Count |   |
|   |             |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   |             |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   |             |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   |             |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   |             |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   |             |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   |             |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   |             |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   |             |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |
|   | 4           |             |                      |                         |                         |                        |                            |                 |                 |             |                 | _                 | Add                 | Edit      | Clear     |                         |           |         |             |                       |                   |          |                      |                      | • |
| Г | _           |             |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |           |           |                         |           |         |             |                       |                   |          |                      |                      |   |

- 5. Drag and drop the file intended for upload directly into the blank table body on the CSV Upload Input Data screen. The file data will populate on this screen momentarily. Once this has occurred, click the "Edit" button.
  - If the "Add" button is selected, the user will receive an error message. If this occurs, simply close the error message and select "Edit" instead.
  - The "Clear" button may be used at any time to remove uploaded data before it is added to the database.

| Control         Ubber Cold         Database         Distribution  | Energ                        | gy Effi              | ciency                  | Meas                    | ure Data               | base                       |                 |                 |   |                 |                   |                     |           |                        |   |          |         |       |             |                       |                   |           |                      |                      |  |
|---|------------------------------|----------------------|-------------------------|-------------------------|------------------------|----------------------------|-----------------|-----------------|---|-----------------|-------------------|---------------------|-----------|------------------------|---|----------|---------|-------|-------------|-----------------------|-------------------|-----------|----------------------|----------------------|--|
| CVPUpubure         Description  |                              |                      | Upload CSV              | Pending                 |                        |                            |                 |                 |   |                 |                   |                     |           |                        |   |          |         |       |             |                       |                   |           |                      |                      |  |
| UN-VIC-<br>Name         U        U         U <th< th=""><th>and the second second second</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></th<>   | and the second second second |                      |                         |                         |                        |                            |                 |                 |   |                 |                   |                     |           |                        |   |          |         |       |             |                       |                   |           |                      |                      |  |
| Lbb         Measure         Measure         Defaultion         Description         Descriptio   | CSV Uploa                    | Input Data           | 2                       |                         |                        |                            |                 |                 |   |                 |                   |                     |           |                        |   |          |         |       |             |                       |                   |           |                      |                      |  |
|   | CAMS<br>Measure ID           | Measure<br>Detail ID | Lead<br>Participant(ID) | LP Measure<br>Detail ID | Measure<br>Detail Name | Distribution<br>Company ID | Measure<br>Life | Program<br>Name | Sector Type                             | End Use<br>Type | Custom<br>End Use | Appregation<br>Flag | Summer kW | Winter kW              | Retail<br>Customer Name                 | Street   | City    | State | Postal Code | Reference<br>Doc Name | Reference<br>Code | Comments  | Installation<br>Date | Aggregation<br>Count |  |
|   | 1000000                      | *******              | 1000000000              | 10000000                | ******                 | 100000000                  | 100000          | ******          | ******                                  | ******          | 10000000          | 100000000           | 10000000  | ******                 | 100000000000                            | ******   | warmer. | **    | 1000000     | 10000000              | ******            | 10000000  | 101100000            | 1000000              |  |
|   | XXXXXXX                      | XXXXXXXX             | 10000000                | 1000000                 | 100000000000           | 10000000                   | 100000          | 10000000        | 11111111111111                          | 100000000       | 1000000           | INTERNET            | 1000000   | 11111111               | 1000000000                              | 100000   | XXXXXX  | xx    | XXXXXXX     | 10000000              | 10100000          | THUTTON   | 10000000             | XXXXXXXX             |  |
|   | KNOKKOK                      | 10000000             | 100000000               | 10000000                | 111111111111111        | 100000000                  | 100000          | 100000000       | 1000000000                              | 100000000       | *******           | 10000000            | 10000000  | 100000000              | ******                                  | 100000   | XXXXXX  | XX    | XXXXXXX     | 10000000              | 10000000          | 10000000  | 100000000            | 1000000              |  |
| NUMBER         NUMBER<   | XXXXXXXXX                    | 100000000            | 100000000               | 1000000                 | 100000000000           | 100000000                  | XXXXXXX         | 100000000       | 101000000000                            | 100000000       | 100000000         | 100000000           | 100000000 | 100000000              | 100000000000                            | 10000000 | 300008  | XX    | X00000K     | 100000000             | 100000000         | 100000000 | 100000000            | X00000X              |  |
|   | XXXXXXXX                     | 10000000             | 1000000000              | 10000000                | 100000000000           | 100000000                  | 1000000         | 1000000000      | 1000000000000                           | 100000000       | 100000000         | X0000000X           | 100000000 | 100000000              | X00000000000                            | 10000000 | XXXXXX  | XX    | X00000K     | 100000000             | X00000000         | 100000000 | 100000000            | X000000X             |  |
| NANDA         NANDA <th< th=""><th>30003008</th><th>100000000</th><th>1000000000</th><th>100000000</th><th>1000000000000</th><th>1000000000</th><th>1000000</th><th>100000000</th><th>1000000000000</th><th>1000000000</th><th>100000000</th><th>X0000000X</th><th>300000000</th><th>100000000</th><th>1000000000000</th><th>10000000</th><th>300000</th><th>XX</th><th>XXXXXXXXX</th><th>100000000</th><th>100000000</th><th>100000000</th><th>1000000000</th><th>X000000X</th><th></th></th<> | 30003008                     | 100000000            | 1000000000              | 100000000               | 1000000000000          | 1000000000                 | 1000000         | 100000000       | 1000000000000                           | 1000000000      | 100000000         | X0000000X           | 300000000 | 100000000              | 1000000000000                           | 10000000 | 300000  | XX    | XXXXXXXXX   | 100000000             | 100000000         | 100000000 | 1000000000           | X000000X             |  |
|   | 30000000                     | 100000000            | 3000000000              | 100000000               | 1000000000000          | 1000000000                 | 1000000         | 100000000       | 1000000000000                           | 1000000000      | 100000000         | 100000000           | 300000000 | 100000000              | 3000000000000                           | 10000000 | 300000  | XX    | X00000K     | 100000000             | 1000000000        | 100000000 | 3000000000           | X000000K             |  |
| NONCOM         NONCOM<   | XXXXXXXX                     | 100000000            | 1000000000              | 10000000                | 1000000000000          | 1000000000                 | 3000000         | 100000000       | 100000000000000000000000000000000000000 | 100000000       | 100000000         | 100000000           | 100000000 | 100000000              | 1000000000000                           | 10000000 | 100000  | XX    | X00000K     | 100000000             | 1000000000        | 100000000 | 100000000            | X000000X             |  |
|   | XXXXXXXX                     | 100000000            | 100000000               | 10000000                | 100000000000           | 100000000                  | 1000000         | 100000000       | 100000000000000000000000000000000000000 | 100000001       | 100000000         | 100000000           | 100000001 | 100000000              | 100000000000                            | 10000000 | 100000  | XX    | 1000000     | 100000000             | 100000000         | 100000000 | 100000000            | 10000000             |  |
|   | XXXXXXX                      | 10000000             | 100000000               | 10000000                | 100000000000           | 10000000                   | 100000          | 100000000       | 10000000000                             | 100000000       | 100000000         | 100000000           | 100000000 | 100000000              | 100000000000000000000000000000000000000 | 10000000 | 300000  | XX    | X00000K     | 10000000              | 100000000         | 100000000 | 100000000            | 10000000             |  |
|   | 30000000                     | 100000000            | X000000000              | 10000000                | 100000000000           | 1000000000                 | 1000000         | 100000000       | 100000000000000000000000000000000000000 | 100000000       | 100000000         | 100000000           | 10000000  | 10000000               | 10000000000                             | 1000000  | 100000  | жx    | XXXXXXXX    | 100000000             | 100000000         | 100000000 | 1000000000           | X000000K             |  |
|   | 3000000                      | 100000000            | 100000000               | 100000000               | 1000000000             | 100000000                  | 1000000         | 100000000       | 100000000000                            | 100000000       | 100000000         | 100000000           | 100000000 | 100000000              | 10000000000                             | 10000000 | 300008  | XX    | XXXXXXXX    | 100000000             | 100000000         | 100000000 | 1000000000           | X000000K             |  |
|   | 3000000                      | 10000000             | 1000000000              | 10000000                | 1010000000000          | 100000000                  | 1000000         | 100000000       | 100000000000000000000000000000000000000 | 100000000       | 100000000         | 100000000           | 10000000  | 100000000              | 1000000000                              | 10000000 | 300000  | XX    | 1000000     | 10000000              | 100000000         | 10000000  | 100000000            | 10000000             |  |
|   | 30000000                     | 100000000            | 1000000000              | 10000000                | 100000000000           | 1001000000                 | 1000000         | 100000000       | 10000000000                             | 1000000000      | 100000000         | 30000000            | 100000000 | 100000000              | 100000000000                            | 10000000 | 300000  | XX    | X00000K     | 10000000              | 100000000         | 10000000  | 1000000000           | 10000000             |  |
|   | 3000000                      | 100000000            | 100000000               | 10000000                | 1000000000             | 100000000                  | 1000000         | 100000000       | 1000000000                              | 1000000000      | 100000000         | 10000000            | 10000000  | 10000000               | 10000000000                             | 10000000 | 100001  | XX    | XXXXXXXX    | 10000000              | 100300000         | 10000000  | 100000000            | X000000X             |  |
|   | X00000X                      | 10000000             | 1000000000              | 10000000                | 10000000000            | 1000000000                 | 1000000         | 100000000       | 1000000000                              | 100000000       | 10000000          | 10000000            | 100000000 | 10000000               | 10000000000                             | 1000000  | X0000K  | 3KK   | XXXXXXX     | 10000000              | 100000000         | 10000000  | 100000000            | 10000000             |  |
|   | XXXXXXXX                     | 10000000             | 10000000                | 10000000                | 10000000000            | 10000000                   | 100000          | 10000000        | 1000000000                              | 100000000       | 10000000          | 10000000            | 10000000  | 10000000               | 10000000000                             | 1000000  | 300000  | XX    | X00000K     | 10000000              | 100000000         | 10000000  | 100000000            | 10000000             |  |
|   | XXXXXXX                      | 10000000             | 10000000                | 1000000                 |                        | 1001000                    | 100000          | 10000000        | 1000000000                              | 10000000        | 1000000           | 10000000            | 10000000  | 10000000               | 1000000000                              | 1000000  | 100001  | 308   | XXXXXXX     | 1000000               | 10000000          | 10000000  | 10000000             | 10000001             |  |
|   | ROOOD                        | 10000000             | 10000000                | 1000000                 |                        | 10000000                   | 100000          | 10000000        | 100000000                               | 10000000        | 10000000          | 10000000            | 10000000  | 10000000               | 1000000000                              | 100000   | 100001  | XX    | 100000      | 10000000              | 10000000          | 1000000   | 10000000             | 1000001              |  |
|   |                              |                      |                         |                         |                        |                            |                 |                 |   |                 |                   |                     |           |                        |   |          |         |       |             |                       |                   |           |                      |                      |  |
|   | 100                          |                      |                         |                         |                        |                            |                 |                 |   |                 |                   |                     | et altre  | Contract of the second |   |          |         |       |             |                       |                   |           |                      |                      |  |
| Aug Celt  |                              |                      |                         |                         |                        |                            |                 |                 |   |                 |                   | 200                 | CUIL      | Clear                  |   |          |         |       |             |                       |                   |           |                      |                      |  |
| 4   | 4                            |                      |                         |                         |                        |                            |                 |                 |   |                 |                   |                     |           |                        |   |          |         |       |             |                       |                   |           |                      |                      |  |

6. If there are no validation errors, all data that was previously in the data upload grid will disappear and a success message will be shown indicating that these Measure Detail updates have been accepted.

| Ener               | gy Effi              | ciency                  | Meası                   | ıre Data               | base                       |                 |                 |             |                 |                   |                     |               |           |                         |            |       |             |                       |                   |          |                      |                      |     |
|--------------------|----------------------|-------------------------|-------------------------|------------------------|----------------------------|-----------------|-----------------|-------------|-----------------|-------------------|---------------------|---------------|-----------|-------------------------|------------|-------|-------------|-----------------------|-------------------|----------|----------------------|----------------------|-----|
|                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     |               |           |                         |            |       |             |                       |                   |          |                      |                      |     |
| CSV Uplo           | ed Input Data        | 0                       |                         |                        |                            |                 |                 |             |                 |                   |                     |               |           |                         |            |       |             |                       |                   |          |                      |                      |     |
| CAMS<br>Measure II | Measure<br>Detail ID | Lead<br>Participant(ID) | LP Measure<br>Detail ID | Measure<br>Detail Name | Distribution<br>Company ID | Measure<br>Life | Program<br>Name | Sector Type | End Use<br>Type | Custom<br>End Use | Aggregation<br>Flag | Summer kW     | Winter kW | Retail<br>Customer Name | Rreet City | State | Postal Code | Reference<br>Doc Name | Reference<br>Code | Comments | Installation<br>Date | Aggregation<br>Count | - 1 |
|                    |                      |                         |                         |                        |                            |                 |                 |             |                 |                   | shad survess        |               |           | จา                      |            |       |             |                       |                   |          |                      |                      |     |
|                    |                      |                         |                         |                        |                            |                 |                 |             |                 | s                 | iuccessfully upo    | lated measure | es.       |                         |            |       |             |                       |                   |          |                      |                      | _   |
| 4                  |                      |                         |                         |                        |                            |                 |                 |             |                 |                   |                     | OK            |           |                         |            |       |             |                       |                   |          |                      |                      | •   |

7. If there are problems with the file, the user may receive an error message similar to this after clicking "Edit":

| Energ       | y Eff                                   | iciency         | / Meas          | ure Data                                | base         |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
|-------------|---|-----------------|-----------------|---|--------------|---------|--------------|---|----------------|------------|-----|-----------|-----------|--|-----------|--------------|-------------|-------------|------------|--|--------------|------------|
|             |   |                 |                 |   |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
| sarch Add N | kailure Det                             | ail Upload CS   | V Pending       |   |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
|             |   |                 |                 |   |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
|             |   |                 |                 |   |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
| Line Number | Erra                                    |                 |                 |   |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
| 1           | Stat                                    | e must be a ma: | amum of 2 char  | acters                                  |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
| - 2         | Stat                                    | e must be a ma: | eimum of 2 char | acters                                  |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
| - 3         | Stat                                    | e must be a mai | dmum of 2 char  | acters                                  |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
| - 4         | Stat                                    | e must be a mai | kimum of 2 char | acters                                  |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
| 5           | Stat                                    | e must be a mai | emum of 2 char  | acters                                  |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
| - 6         | Stat                                    | e must be a mai | imum of 2 char  | acters                                  |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
|             |   |                 |                 |   |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
|             |   |                 |                 |   |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
| CSV Upload  | Input Dat                               | a 17            |                 |   |              |         |              |   |                |            |     |           | _         | 1  |           |              |             |             |            |  |              |            |
| CAME.       | Mensure                                 | Lead            | 10 Measure      | Measure                                 | Distribution | Measure | Error me     | ssage: Upload p                         | rocess failed. |            |     |           | ×         | Retail   |           | and harmen   | -           | Reference   | Reference  |  | Installation | Antenation |
| easure ID   | Detail ID                               | Participant(    | ID) Detail ID   | Detail Name                             | Company ID   | Life    | No.          |   |                |            |     |           |           | Customer Name  | Street    | City State   | Postal Code | Doc Name    | Code       | Comments   | Date         | Count      |
|             |   |                 |                 |   |              |         | Please I     | ix errors in the ca                     | r uprod0 Hie   | an ny agan |     |           |           |  |           |              |             |             |            |  |              |            |
| XXXXXXX     | XXXXXXX                                 | 2000000         | XXXXXXXXXX      | XXXXXXXXXXXXX                           | 20000000     | xx      |              |   |                |            |     |           |           | XXXXXXXXXX   | XXXXXXX   | XXXXXX XX    | XXXXXXX     | XXXXXXXXXX  | XXXXXXXX   | XXXXXXXX   | 10000000     | XXX        |
| X000000K    | X00000X                                 | 10000000        | 3000000X        | X00000000000X                           | 30000000     | XX      | 20           |   |                |            |     |           |           | X000000000   | XXXXXXXX  | XXX XXXXXXX  | 300300308   | X3000000X   | XXXXXXXXXX | XXXXXXXXXX   | 10000000     | 3000       |
| KODCIDCK    | XXXXXXXXX                               | 30000000        | 30000000        | 30000000000000                          | 3000300300   | XX      | 10           |   |                |            |     |           |           | 3000000000   | XXXXXXXXX | XXXXXXXX XXX | 30000000    | XXXXXXXXX   | 100000000  | XXXXXXXXX  | X0000000     | 2000       |
| 10000000    | XIOCIOCX                                | 30000000        | 3000000X        | 300000000000X                           | 200000000    | XX 3    | 1            |   |                |            |     |           |           | 30000000000  | X300300X  | 300 XXXXXXX  | 300300000   | X000000X    | 30000000   | 300000000  | 10000000     | 30300      |
| 000000X     | XDOCIOEX                                | 2000000         | X000000X        | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 200000000    | 200     | 1            |   |                |            |     |           |           | 2000000000   | XXXXXXXX  | XXXXXX XX    | 20000000    | X000000X    | 20000000   | 2000000X   | 10000000     | XXX<br>XXX |
| XXXXXXXX    | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX | 10000000        | X0000000        | 3000000000000                           | 200000000    | XX      | XXXXXXXXXX   | 000000000000000000000000000000000000000 | XXXXXXXXXXX    | 100000000  | x   | XXXXXXXX  | 10000000  | X000000000   | XXXXXXXXX | XXX XXXXXXXX | XXXXXXXXX   | XXXXXXXXXXX | X000000X   | XXXXXXXXX  | XXXXXXXXX    | XXX        |
| XXXXXXXXXX  | XXXXXXXXX                               | 30000000        | X000000K        | 3000000000000                           | 30000000     | 305     | XXXXXXXXXXXX | 1000000000000                           | X000000X       | 1003003000 | X   | XXXXXXXXX | 200300000 | 3000000000   | XXXXXXXX  | XOCXOCX XOC  | 30000000    | XXXXXXXXXX  | XXXXXXXXXX | 3000000X   | X0000000     | 3005       |
| 3000XXXX    | 1000000                                 | 30000000        | X000000X        | 200000000000000000000000000000000000000 | 3000300300   | 300     | XXXXXXXXXXX  | 000000000000000000000000000000000000000 | XXXXXXXXXXX    | 3000000000 | ×   | XXXXXXXX  | 30000000  | 1000000000   | XXXXXXXXX | 30030000 300 | 30000000    | XXXXXXXXXX  | 300000000  | XXXXXXXXXX   | X0000000     | XXX        |
| X000000X    | XXXXXXXXX                               | 30000000        | X000000K        | 300000000000                            | 30000000     | XX      | X000000X     | 100000000000                            | 30000000       | 300000000  | х   | 3000000   | 30000000  | 30000000000  | 3000000   | 300 X300000  | 30000000    | XXXXXXXXXX  | 10000000   | X000000X   | 10000000     | XXX        |
| X0000000    | X00000X                                 | 30000000        | 30000000        | 2000000000000                           | 300000000    | XX      | 30000000     | 1000000000000                           | 300000000      | 300000000  | X   | 3000000   | 30000000  | 300000000  | X00000X   | JODOCK JOL   | 3000000     | X000000X    | 100000000  | X000000X   | 100000000    | 3000       |
| XXXXXXX     | XXXXXXX                                 | 2000000         | 2000000         | 3030000000000                           | 20000000     | 205     | XXXXXXXX     | *****                                   | 20000000       | *******    | 3   | XXXXXXX   | 2002000   | XXXXXXXXXXXX   | XXXXXXX   | XXXXXX XX    | 2000000     | XXXXXXXXX   | XXXXXXXXX  | XXXXXXXXXX   | XXXXXXXXX    | X.XX       |
| YTTTTT      | ******                                  | NAME OF TAXABLE | 100000          | 200000000000000000000000000000000000000 | 20020000     | ÷       | YTTTTTTT     |   | XXXXXXXXX      |            | 0   | TATAL     | 1000000   | TAXABLE IN TAXABLE INTENTIN TAXABLE IN TAXAB | YTYTY     | NUMBER OF    | ACCOUNT.    | YYYYYYY     | XXXXXXXXX  | TAXABLE IN TAXABLE INTENTIN TAXABLE IN TAXAB | *******      | 202        |
| XXXXXXX     | XXXXXXX                                 | XXXXXXXX        | XXXXXXXXX       | XXXXXXXXXXXXXX                          | 20000000     | XX      | XXXXXXXXX    | X XXX XXX XXX XXX XXX                   | XXXXXXXXX      | XXXXXXXXXX | x   | XXXXXX    | XXXXXXXX  | XXXXXXXXXXXX   | XXXXXXXX  | XXXXXX XX    | XXXXXXX     | XXXXXXXX    | XXXXXXXXX  | XXXXXXXX   | XXXXXXXX     | XXX        |
| 30003003    | XIOCIOCK                                | 30030000        | X000000X        | X00000000000                            | 3000300300   | 300     | XXXXXXXXXXX  | 100000000000                            | XXXXXXXXX      | 300000000  | ×   | XXXXXXX   | 300300300 | XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX  | XXXXXXXXX | 300300X 30X  | 300300000   | X000000X    | X0000000   | 300000000  | X0000000     | 3000       |
|             |   |                 |                 |   |              |         |              |   |                |            |     |           |           |  |           |              |             |             |            |  |              |            |
|             |   |                 |                 |   |              |         |              |   |                |            | Add | Edit      | Clear     |  |           |              |             |             |            |  |              |            |
|             |   |                 |                 |   |              |         |              |   |                |            |     |           | inter a   | -  |           |              |             |             |            |  |              |            |
|             |   |                 |                 |   |              |         |              |   |                |            |     |           |           | _  |           |              |             |             |            |  |              |            |

- The box that appears at the top of the screen will list all existing validation errors. Click "OK" on the error message box to review this list.
- 8. Data cannot be edited directly on the CSV Upload Input Data screen. When review of the list of errors is completed and the CSV file is corrected, click the "Clear" button to remove all data from the upload grid. Re-upload the file by dragging and dropping the corrected file, then selecting the "Edit" button.



#### **IMPORTANT**

- New Measure Detail Data and updates to existing Measure Detail Data must be uploaded in separate files.
- It is not possible to upload two separate CSV files at the same time. Attempting to drag a second file into the upload window will overwrite the original data.

## 2.2.7 View Pending Changes

This section covers the process of adding, viewing and acting upon Pending changes to Measure Details.

- ✤ Roles that can perform this task:
  - External EEM Maintainer
  - External EEM Viewer (view steps only)
- 1. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 2. Click on "Pending" in the menu bar:

# **Energy Efficiency Measure Database**

Search Add Measure Detail Pending

3. The Pending Measure Details screen is displayed:

| i | iner                  | gy Efficiency                           | Measure                    | Data                          | ibase                       |                                    |           |   |                   |
|---|-----------------------|---|----------------------------|-------------------------------|-----------------------------|------------------------------------|-----------|---|-------------------|
|   |                       |   |                            |                               |                             |                                    |           |   |                   |
|   |                       |   |                            |                               |                             |                                    |           |   |                   |
| P | ending Mea            | asure Details                           |                            |                               |                             |                                    |           |   |                   |
|   | Status                | Lead Participant(ID)                    | Measure In<br>Detail ID Da | stallation First<br>ate in Ma | Month Measure<br>arket Life | Measure<br>Expiration Da Summer kW | Winter kW | Measure(ID)                             | Submitted<br>Date |
| • | Measure<br>Detail ID: | 0000                                    |                            |                               |                             |                                    |           |   |                   |
| [ | PENDING               | 5 1000000000000000000000000000000000000 | X0000 X                    | XXXX 2000000                  | 30000 30000                 | X0000000 X0000                     | X0000     | 100000000000000000000000000000000000000 | 12/10/2014        |
|   | CURREN                | 100000000000000000000000000000000000000 | X0000 X                    | XXXX 000000X                  | 30000 30000                 | X0000000 X0000                     | 30000     | 100000000000000000000000000000000000000 | 11/07/2014        |
| • | Measure<br>Detail ID: | 2000                                    |                            |                               |                             |                                    |           |   |                   |
| [ | PENDING               | G 1000000000000000000000000000000000000 | X0000 X0                   | 000000 1000                   | 3000X 2000X                 | X0000000 X0000                     | X0000     | 100000000000000000000000000000000000000 | 12/10/2014        |
|   | CURREN                | T 1000000000000000000000000000000000000 | X0000 X                    | 000000 00000                  | 30000 X0000                 | X000X 2000000X                     | 30000     | 100000000000000000000000000000000000000 | 11/07/2014        |
|   | Measure<br>Detail ID: | 0000                                    |                            |                               |                             |                                    |           |   |                   |
| [ | PENDING               | 5 1000000000000000000000000000000000000 | X0000 X                    | 1000000 1000                  | 30000 30000                 | X0000000 X0000                     | X0000     | 100000000000000000000000000000000000000 | 12/11/2014        |
|   |                       |   |                            |                               |                             |                                    |           |   |                   |
|   |                       |   |                            |                               |                             |                                    |           |   |                   |
|   |                       |   |                            |                               |                             |                                    |           |   |                   |
|   |                       |   |                            |                               | Cancel                      |                                    |           |   |                   |

- 4. Each row in the display is organized by the Measure Detail ID and contains two sub-rows. The first row is the pending values, and the second row is the current values. The exception to this is if a Measure Detail was placed into pending upon creation. In this case there will be only one sub-row.
- 5. Double clicking on a Measure Detail with a status of "PENDING" will navigate to the Pending tab for the selected Measure Detail (see "<u>View Pending Measure Detail</u>" on page 54). Double

clicking on a Measure Detail with a status of "CURRENT" will navigate to the Measure Detail tab for the selected Measure Detail (see "<u>View Measure Detail</u>" on page 34).

#### NOTE: The following steps only apply to an External EEM Maintainer.

- 6. Each row has a checkbox in the first column. Clicking on the checkbox selects the Measure Detail for action.
- 7. The header row contains a checkbox that serves as a "Select All" and "Select None" option.
- 8. The display contains the following columns:
  - Status
  - Lead Participant Name (ID)
  - Measure Detail ID
  - Installation Date
  - First Month in Market
  - Measure Life
  - Measure Expiration Date
  - Summer kW
  - Winter kW
  - Measure (ID)
  - Submitted Date The system time at which the change that caused this pending record was made.
- 9. Clicking the "Cancel" button (External EEM Maintainer only) will display a confirmation dialog:

| E     | nerg                    | y Efficiency                            | Measur               | e Da                 | taba                     | ise             |                          |           |           |   |                   |
|-------|-------------------------|---|----------------------|----------------------|--------------------------|-----------------|--------------------------|-----------|-----------|---|-------------------|
| Searc | n Add Measu             | ire Detail Pending                      |                      |                      |                          |                 |                          |           |           |   |                   |
|       |                         |   |                      |                      |                          |                 |                          |           |           |   |                   |
| Pe    | nding Measu             | re Details                              |                      |                      |                          |                 |                          |           |           |   |                   |
|       | Status                  | Lead Participant(ID)                    | Measure<br>Detail ID | Installation<br>Date | First Month<br>in Market | Measure<br>Life | Measure<br>Expiration Da | Summer kW | Winter kW | Measure(ID)                             | Submitted<br>Date |
| 8     | Measure<br>Detail ID: 💷 | 101                                     |                      |                      |                          |                 |                          |           |           |   |                   |
|       | PENDING                 | And the second second second            | KARAMANAN            | KARABARARA           |                          |                 |                          | KERKERKER |           |   | 12/10/2014        |
|       | CURRENT                 | 100000000000000000000000000000000000000 | 30000                | 10000000             | 10000000                 | 30000           | X0000000                 | 30000     | 30000     | 10000000000000000                       | 11/07/2014        |
| •     | 4easure<br>Detail ID: 💷 | 00                                      |                      |                      |                          |                 |                          |           |           |   |                   |
|       | PENDING                 | x00000000000000000000000000000000000000 | 30000                | X0000000             | 10000000                 | 30000           | X0000000                 | 30000     | 30000     | 100000000000000000000000000000000000000 | 12/10/2014        |
|       | CURRENT                 | 100000000000000000000000000000000000000 | 30000                | 10000000             | 10000000                 | 30000           | 10000000                 | 30000     | 30000     | 100000000000000000000000000000000000000 | 11/07/2014        |
| •     | Measure<br>Detail ID: 💷 | 000                                     |                      |                      |                          |                 |                          |           |           |   |                   |
|       | PENDING                 | 100000000000000000000000000000000000000 | 30000                | X0000000             | 10000000                 | 30000           | X0000000                 | 30000     | 30000     | Message from webpage                    | /11/2014          |
|       |                         |   |                      |                      |                          |                 |                          |           |           | Are you sure you want to cance          | 12                |
|       |                         |   |                      |                      |                          | Cancel          |                          |           |           | OK Cano                                 | el                |
|       |                         |   |                      |                      |                          |                 |                          |           |           |   |                   |

- 10. Upon confirmation that the user wants to continue with the Cancel operation, the Measure Detail associated with each checked row is left intact and the Pending version of the Measure Detail is discarded.
- 11. After Cancelling a set of changes, a Success or Failure message appears and the display is refreshed with any remaining Pending changes:

| nerg                    | y Efficiency N   | leasu                      | re Da  | taba   | se                         |                            |                            |                            |   |   |
|-------------------------|--|----------------------------|--|--|----------------------------|----------------------------|----------------------------|----------------------------|---|---|
| Add Measur              | e Detail Pending   |                            |  |  |                            |                            |                            |                            |   |   |
|                         |  |                            |  |  |                            |                            |                            |                            |   |   |
| nding Measur            | e Details  |                            |  |  |                            |                            |                            |                            |   |   |
| Status                  | Lead Participant(ID)   | Measure<br>Detail ID       | Installation<br>Date   | First Month<br>in Market   | Measure<br>Life            | Measure<br>Expiration Da   | Summer kW                  | Winter kW                  | Measure(ID)   | Submitted<br>Date   |
| leasure<br>letail ID:   | 00   |                            |  |  |                            |                            |                            |                            |   |   |
| PENDING                 | 100000000000000000000000000000000000000  | X0000                      | X0000000   | 30000000   | 30000                      | 30000000                   | 30000                      | 30000                      | 100000000000000000000000000000000000000   | 12/10/2014  |
| CURRENT                 | 100000000000000000000000000000000000000  | X0000                      | 10000000   | 10000000   | 30000                      | 30000000                   | 30000                      | 30000                      | 100000000000000000000000000000000000000   | 11/07/2014  |
| leasure<br>letail ID: 💷 | 00   |                            |  |  |                            |                            |                            |                            |   |   |
| PENDING                 | 100000000000000000000000000000000000000  | X0000                      | 10000000   | X0000000   | 30000                      | 10000000                   | 30000                      | 30000                      | 100000000000000000000000000000000000000   | 12/11/2014  |
|                         |  |                            |  |  |                            |                            |                            |                            |   |   |
|                         |  |                            |  |  |                            |                            |                            |                            |   |   |
|                         |  |                            |  |  |                            |                            |                            |                            |   |   |
|                         |  |                            |  |  |                            |                            |                            |                            |   |   |
|                         |  |                            |  |  |                            |                            |                            |                            |   |   |
|                         |  |                            |  |  |                            |                            |                            |                            |   |   |
|                         |  |                            |  |  | Cancel                     |                            |                            |                            |   |   |
|                         | Add Measur<br>nding Measur<br>Status<br>Status<br>PENDING<br>CURRENT<br>Measure<br>PENDING | Add Measure Detail Pending | Add Measure Detail Pending  Inding Heasure Details  Status Lead Participant(ID) Measure Detail ID  PENDING  CURRENT  Measure PENDING  PENDING  CURRENT  CURR | Add Measure Detail Pending  Inding Heasure Details  Status Lead Participant(ID) Measure Detail ID  Feasure PENDING  CURRENT  Teasure PENDING  PENDING  Detail ID: PEND | Add Measure Detail Pending | Add Measure Detail       Pending         Inding Measure Details       Installation       First Month       Measure       Measure       Summer kW       Winter kW         Status       Lead Participant(ID)       Measure       Detail ID       Date       In Market       Life       Expiration Da       Summer kW       Winter kW         PENDING       Data       Data <td< td=""><td>Add Measure Detail       Pending         Inding Measure Details       Installation       First Month       Measure       Desure       &lt;</td></td<> | Add Measure Detail       Pending         Inding Measure Details       Installation       First Month       Measure       Desure       < |

## 2.2.8 View Pending Measure Detail

This section covers the process of viewing the pending version of a Measure Detail.

- Roles that can perform this task:
  - External EEM Maintainer
  - External EEM Viewer (view steps only)
- 1. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 2. Click on "Pending" in the menu bar:

# **Energy Efficiency Measure Database**

Search Add Measure Detail Pending

3. The Pending Measure Details screen is displayed:

| l | In         | erg                  | y Efficiency Me                         | asur                 | e Da                 | taba                     | se              |                          |           |           |   |                   |
|---|------------|----------------------|---|----------------------|----------------------|--------------------------|-----------------|--------------------------|-----------|-----------|---|-------------------|
|   |            |                      | e Detail Pending                        |                      |                      |                          |                 |                          |           |           |   |                   |
|   |            |                      |   |                      |                      |                          |                 |                          |           |           |   |                   |
| P | endi       | ing Measur           | e Details                               |                      |                      |                          |                 |                          |           |           |   |                   |
|   |            | Status               | Lead Participant(ID)                    | Measure<br>Detail ID | Installation<br>Date | First Month<br>in Market | Measure<br>Life | Measure<br>Expiration Da | Summer kW | Winter kW | Measure(ID)                             | Submitted<br>Date |
|   | Mea<br>Det | asure<br>ail ID:     | 00                                      |                      |                      |                          |                 |                          |           |           |   |                   |
|   | F          | PENDING              | 100000000000000000000000000000000000000 | 30000                | X0000000             | 10000000                 | X0000           | 00000000                 | 30000     | 30000     | 100000000000000000000000000000000000000 | 12/10/2014        |
|   | 0          | CURRENT              | 100000000000000000000000000000000000000 | 30000                | X0000000             | 10000000                 | 30000           | 10000000                 | 30000     | 30000     | 100000000000000000000000000000000000000 | 11/07/2014        |
| • | Mea<br>Det | asure<br>ail ID: 100 | 00                                      |                      |                      |                          |                 |                          |           |           |   |                   |
|   | F          | PENDING              | 100000000000000000000000000000000000000 | 30000                | 10000000             | 10000000                 | 30000           | 10000000                 | 30000     | 30000     | 100000000000000000000000000000000000000 | 12/10/2014        |
|   | 0          | CURRENT              | 100000000000000000000000000000000000000 | 30000                | X0000000             | 10000000                 | 30000           | 10000000                 | 30000     | 30000     | 100000000000000000000000000000000000000 | 11/07/2014        |
| • | Mea<br>Det | asure<br>ail ID: 100 | 00                                      |                      |                      |                          |                 |                          |           |           |   |                   |
|   | F          | PENDING              |   | 30000                | 10000000             | 10000000                 | 30000           | 10000000                 | 30000     | 30000     | 100000000000000000000000000000000000000 | 12/11/2014        |
|   |            |                      |   |                      |                      |                          |                 |                          |           |           |   |                   |
|   |            |                      |   |                      |                      |                          |                 |                          |           |           |   |                   |
|   |            |                      |   |                      |                      |                          |                 |                          |           |           |   |                   |
|   |            |                      |   |                      |                      |                          | Cancel          |                          |           |           |   |                   |

4. Double click on a Measure Detail with a status of "PENDING" to navigate to the Pending tab for the selected Measure Detail:

| Energy Effic                      | ciency Measure | Database                 |   |
|-----------------------------------|----------------|--------------------------|---|
| Search Add Measure Detail Pending |                |                          |   |
| Measure Detail Pending            | History        |                          |   |
| Basic                             |                | CAMS Fields              |   |
| Lead Participant:                 | ×              | Measure:                 | •                                       |
| ISO Measure Detail ID:            |                | Asset:                   |   |
| LP Measure Detail ID:             |                | Resource:                |   |
| Measure Detail Name:              |                | Load Zone:               |   |
| Distribution Company:             |                | Retail Customer          |   |
| Installation Date:                |                | Retail Customer Name:    |   |
| First Month in Market:            |                | Street:                  | 000000000000000000000000000000000000000 |
| Measure Life (yrs):               |                | City:                    | 000000000000000000000000000000000000000 |
| Measure Expiration Date:          |                | State:                   | ••••••••••••••••                        |
| Program Name:                     |                | Zip:                     | AND CONTRACTOR CONTRACTOR CONTRACTOR    |
| Sector/End Use:                   | •              | Reference Documentation  |   |
| Custom End Use:                   |                | Reference Document Name: | 100000000000000000000000000000000000000 |
| Aggregation:                      | •              | Measure Reference Code:  |   |
| Number of Aggregation:            |                | Misc                     |   |
| Monthly kW Summer:                |                | Date Updated:            |   |
| Monthly kW Winter:                |                | Updated By:              | 400000000000000000000000000000000000000 |
|                                   |                | Comments:                |   |
|                                   |                |                          | Cancel                                  |

#### NOTE: The following steps only apply to an External EEM Maintainer.

5. The "Cancel" button is used to cancel an update request prior to ISO review.

6. Clicking the "Cancel" button displays a confirmation dialog:

| d Measure Detail Pending |          |                         |                                       |                                   |
|--------------------------|----------|-------------------------|---------------------------------------|-----------------------------------|
| e Detail Pending Histo   | ry       |                         |                                       |                                   |
| sic                      |          | CAMS Fields             |                                       |                                   |
| Lead Participant:        | •        | Measure:                |                                       | *                                 |
| ISO Measure Detail ID:   |          | Asset:                  |                                       |                                   |
| LP Measure Detail ID:    |          | Resource:               |                                       |                                   |
| Measure Detail Name:     |          | Load Zone:              |                                       |                                   |
| Distribution Company:    |          |                         |                                       |                                   |
| Installation Date:       |          | Retail Customer Name:   |                                       |                                   |
| First Month in Market:   |          | Street:                 |                                       |                                   |
| Measure Life (yrs):      |          | City:                   |                                       |                                   |
| asure Expiration Date:   |          | State:                  | · · · · · · · · · · · · · · · · · · · |                                   |
| Program Name:            |          | Zip:                    | Me                                    | ssage from webpage                |
| Sector/End Use:          | <b>v</b> |                         |                                       |                                   |
| Custom End Use:          |          | Reference Documentation |                                       | Are you sure you want to cancel ? |
| Aggregation:             | ×        | Measure Reference Code: |                                       | -                                 |
| umber of Aggregation:    |          |                         |                                       | OK Cancel                         |
| Monthly kW Summer        |          | Misc                    |                                       |                                   |
| Monthly kill Winter      |          | Date opuateu:           |                                       |                                   |
| Fioricity Kn whiter.     |          | Updated By:             |                                       |                                   |
|                          |          | Comments:               |                                       |                                   |

Upon confirmation of the cancel, the Pending record is discarded, leaving the current version of the Measure Detail record intact. The "Measure Detail" tab is displayed with the current Measure Detail data (the current record is unaffected – see "<u>View Measure Detail</u>" on page 34):

| Energy Effic                      | ciency Measure D | atabase                  |   |
|-----------------------------------|------------------|--------------------------|---|
| Search Add Measure Detail Pending | 9                |                          |   |
| Measure Detail Pending            | History          |                          |   |
| Basic                             |                  | CAMS Fields              |   |
| Lead Participant:                 | ······           | Measure:                 | ×   |
| ISO Measure Detail ID:            |                  | Asset:                   |   |
| LP Measure Detail ID:             |                  | Resource:                |   |
| Measure Detail Name:              |                  | Load Zone:               |   |
| Distribution Company:             |                  | Retail Customer          |   |
| Installation Date:                |                  | Retail Customer Name:    |   |
| First Month in Market:            | 000000000000 💽   | Street:                  |   |
| Measure Life (yrs):               |                  | City:                    |   |
| Measure Expiration Date:          | (                | State:                   | ×   |
| Program Name:                     |                  | Zip:                     |   |
| Sector/End Use:                   | ······           | Reference Documentation  | Info  |
| Custom End Use:                   |                  | Reference Document Name: |   |
| Aggregation:                      | •                | Measure Reference Code:  | Successfully cancelled pending measure detail |
| Number of Aggregation:            |                  | Misc                     | ОК  |
| Monthly kW Summer:                |                  | Date Updated:            |   |
| Monthly kW Winter:                |                  | Updated By:              |   |
|                                   |                  | Comments:                |   |
|                                   |                  |                          |   |
|                                   |                  |                          |   |
|                                   |                  |                          | Edit  |

#### 2.2.9 CSV Download

This section covers the process of generating a CSV file containing search results for view or download.

- Roles that can perform this task:
  - o External EEM Maintainer
  - External EEM Viewer
- 1. Launch the EEM user interface application. See the "<u>Accessing the Energy Efficiency</u> <u>Measure Database</u>" section on page 10.
- 2. The application opens to the Search page by default:

|   | etali P   | ending   |  |  |      |  |             |             |   |  |  |                    |  |  |
|---|-----------|--|--|--|------|--|-------------|-------------|---|--|--|--------------------|--|--|
| earch Criteria                          |           |  |  |  |      |  |             |             |   |  |  |                    |  | _  |
| As Of                                   | Date:     | 12/11/2014   | Retail Cu  | stomer Name  |      |  |             | Pro         | gram Name:                              |  | Ma   | rket Month:        |  |  |
| ISO Measure Det                         | ail ID:   |  |  | Asset II   |      |  |             | Refe        | rence Code:                             |  | Min  | Installation:      |  | 1  |
| 150 measure bet                         |           | 1000   | 1  |  | -    |  |             |             |   |  |  | , insection of the |  | _  |
| Lead Partic                             | ipant:    | *  |  | Resource II  | ):   |  |             |             | City:                                   |  | Max  | Installation:      |  |  |
| LP Measure Det                          | ail ID:   |  |  | Load Zone II   | ):   |  |             |             | State:                                  |  | Mi   | n Expiration:      |  |  |
| Cashan/Ea                               |           |  | 1  |  |      |  |             |             |   |  |  | . Franking Minana  |  |  |
| Sector/Lin                              | u ose.    |  |  |  |      |  |             |             |   |  | rid.   | x expiration.      |  |  |
|   |           |  |  |  |      |  |             |             |   |  |  |                    | Home   | _  |
|   | -         | and the second s |  | -  |      | and the second s | -           | -           |   | -  |  | *****              |  | and the second s |
| *****                                   | ALC: NO.  | AND DESCRIPTION OF TAXABLE PARTY.  | REPORT OF A  | ADDRESS OF TAXABLE PARTY.  | *    | REAL PROPERTY AND INCOME.  | ADDRESS.    | STATES.     | ******                                  | REAL PROPERTY.   | AREA PROVIDED IN   | KRIGHT             | REPORT OF TAXABLE PARTY.   | ACCOUNT.   |
| *****                                   | ALC: N    | ACCOLUCIO DI   | ADDRESS OF T   | ADDRESS OF TAXABLE PARTY OF TAXABLE PART | ж    | RECORDER OF  | ADDRESS.    | NUMBER OF   | LOCOLOGICOCOCOCOCOCOCO                  | ADDRESSOR  | KONDONIOUNI  | NORONAL DOCUMENTS  | ADDRESS OF THE OWNER   | ADDRESS.   |
| 000000000000000000000000000000000000000 | XXXXX     | AND DESCRIPTION OF THE PARTY OF | 100000000  | ADDRESS ADDRESS  | ж.   | 100000000  | 1000008     | X00000K     | 100000000000000000000000000000000000000 | KORDORODORN  | KICCOCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCC  | KORDONIKH.         | 10000000000  | 100000   |
|   | XXXXX     | KARDOGOODOODOODOODO  | RECORDERED.  | ADADADADADADADA  | ж    | 100000000  | NUMBER      | NUCLER      | *****                                   | XIII XXIII XXXIII XXIII XXXIII XXIII | MARRIED COLUMN   | RECORD.            | RECEIPTION OF THE  | 100303   |
|   | NUMBER OF | RECORDER CONTRACTOR  | RECEIPTION   | ADDRESS OF TAXABLE PARTY.  | ж    | KERNOLOGISKS   | KOUDORK.    | STATISTICS. | KARDOORNAN DORNOONDORNO                 | ARCONGERENCES.   | ADDRESS ADDRESS  | ADDRESS OF         | REPRESENTATION OF  | 100303   |
|   | ALC: N    | REPORT OF THE PARTY OF THE PART | ADDRESS OF TAXABLE   | REPORT OF TAXABLE PARTY.   | ж.   | RESIDENCE AND ADDRESS OF   | NOTION.     | NUMBER OF   | ******                                  | RECORDERATION.   | ADDRESS OF A   | NUMBER OF TAXABLE  | ADDRESS OF TAXABLE   | ADDRESS.   |
|   | ADDAK.    | ROUTOR DESCRIPTION OF THE PARTY | ADDRESS OF THE OWNER   | REAL PROPERTY AND ADDRESS OF   | ж.   | MORTHCHICK/MORTHCHICK  | ROEDON.     | ADDRESS.    | And | ADDRESS ADDRESS  | RECEIPTION OF THE PARTY OF   | NUMBER OF          | ADDRESS OF THE OWNER   | ADDRESS.   |
| ****                                    | ADDA.     | ****************   | ALCO DE LA COMPANSIÓN D | KOURSEDUCTION.   | ж    | ACCOUNTS OF A  | ADDRESS.    | RECEIPT.    |   | RECORDERED AND ADDRESS OF  | ACCOUNTS AND   | ADDRESS OF         | ADDRESS OF TAXABLE PARTY.  | ADDRESS.   |
|   | ADDR.     | ADDRESS OF A DRESS OF  | RECEIPTION OF THE PARTY OF THE  | REPORT OF A DESCRIPTION | ж.   | RECORDERED.  | ADDRESS.    | ADDRESS.    |   | RECORDERED AND ADDRESS.  | ADDRESS AND ADDRES | REPORTS.           | ALCOLUMN DURING ST   | ADDRESS.   |
|   | ADDR.     | RECORDER CONTRACTORS   | ADDRESS OF TAXABLE PARTY.  | READER/READER.   | ж    | READ CONTRACTOR  | 10000       | RECORD.     | ******                                  | KINGGOODOODO   | ADDRESS OF THE OWNER   | RECORD.            | ADDRESSOOR   | ROUNDER.   |
|   | NUMBER    | RECORDON DO COMPANY  | KINDORDOWN   | READERCED DESCRIPTION  | ж.   | KROGOGOGOG   | ADDRESS.    | REAL        | 100000000000000000000000000000000000000 | ADDRESS OF T   | REPORTED AND ADDRESS OF  | ADDRESS.           | 100000000000   | ROUNDER  |
|   | 10000     | ADDRESS AND ADDRES | STATISTICS.  | REACED/CONTRACTOR  | ж. – | KINDOWSKINSK   | 830008      | ADDRESS.    | *******************                     | ARRENT CONTRACTORS   | ADDRESS OF A   | STATISTICS.        | REPORT OF A PARTY OF A | 100000   |
|   | 80008     | REAL PROPERTY AND ADDRESS OF   | REFERENCES.  | RECEIPTION OF THE PARTY OF THE  | ж.   | REPORTED AND A DESCRIPTION OF  | NUMBER OF T | RECEIPT     | ********                                | REPORTED AND A   | ******   | ARRENTS.           | ******   | XXXXXXX  |
|   |           |  |  |  |      |  |             |             |   |  |  |                    |  |  |

- 3. Select the Search criteria desired. (See "<u>Measure Detail Search</u>" on page 29.) If no limiting Search criteria are selected, the CSV file will include all Measure Details currently in the database matching the Lead Participant certificate used.
- 4. Clicking on the "CSV" button opens a dialog box giving the user the option to Open or Save a CSV file:

| arch Criteria<br>As Of Date<br>ISO Measure Detail ID<br>Lead Participant<br>LP Measure Detail ID   | e: 12/11/2014             | Retail Cu                      | istomer Name   | e:         |  |  |                         |  |               |                 |                         |                  |  |                             |
|--|---------------------------|--------------------------------|--|------------|--|--|-------------------------|--|---------------|-----------------|-------------------------|------------------|--|-----------------------------|
| As Of Date<br>ISO Measure Detail ID<br>Lead Participant<br>LP Measure Detail ID  | e: 12/11/2014<br>D:<br>t: | Retail Cu                      | istomer Name   | e:         |  |  |                         |  |               |                 |                         |                  |  |                             |
| ISO Measure Detail ID<br>Lead Participant<br>LP Measure Detail ID  | D:                        |                                |  |            |  |  | Pro                     | gram Name:   |               |                 | Mark                    | et Mont          | th:  |                             |
| Lead Participant   | t                         |                                | Asset I  | D:         |  |  | Refe                    | rence Code:  |               |                 | Min In                  | stallatio        | on:  |                             |
| LP Measure Detail ID   | -                         | ~                              | Resource I   |            |  |  |                         | City:  |               |                 | Max Installation:       |                  |  |                             |
| LP Measure Detail 10   |                           |                                | Lond Zone II   |            |  |  |                         | Chater   |               |                 | Atio F                  |                  |  |                             |
|  |                           | 1                              | Load Zone II   | <i>J</i> : |  |  |                         | State:   |               |                 | Phillip C               | xpiratic         | ин:  |                             |
| Sector/End Use   | e:                        | ~                              |  |            |  |  |                         |  |               |                 | Max E                   | xpiratio         | on:  |                             |
| arch Results   |                           | Too be a feature of the second | First Marth  |            | Marca Car  |  | Water                   |  | Do you        | want to op      | en or save thi          | s file?          |  |                             |
| ad Mea<br>rticipant(ID) Deta   | al Detail Name            | Installation<br>Date           | First Month<br>in Market   | Life       | Measure Expl<br>Date   | kW   | Winter<br>kW            | Load Zone(IC Res   | ×a,           | Type:           | Microsoft Office        | Excel Co         | omma Separatr  | e <mark>d Value</mark> s Fi |
| REAL PROPERTY AND DESCRIPTION  |                           |                                | 1001003000   | ж          | ADDRESS OF T   | ADDRESS.   | 100008                  | 100000000000000000000000000000000000000  |               | Trom.           | .154                    | -ne.coi          |  |                             |
| AND DESCRIPTION OF A DE | B BORODORODORODO          | a announces                    | 00000000   | 8          | ADDRESS OF A   | ADDRESS.   | 100008                  |  |               |                 | Open                    | 1                | Save   | Cancel                      |
| ATTACATOR AND ADDRESS AND ADDRESS ADDR | a execcedences            | a announces                    | RECORDERED.  |            | STREET, STREET | 100008   | KINDOR.                 | REAL PROPERTY OF THE PARTY OF T |               |                 |                         |                  |  |                             |
|  |                           |                                | REAL PROPERTY.   | ÷.         |  | 10.000   | ALCO DE                 | ***********  |               |                 |                         |                  |  |                             |
|  | a exercise exercise       |                                | CONTRACTOR .   | ÷.         | *****  | ROUND.   | 8303038                 | ***********  |               |                 |                         |                  |  |                             |
| contraction and  |                           |                                | ROOTERSTON,  | ÷.         | *******  | 10000  | 800008                  | CONTRACTOR OF THE OWNER OWN  |               | While files fn  | om the Internet of      | an be us         | eful, some files   | can potent                  |
|  | a accessored              |                                | And a second sec | 0.         | ACCOUNTS OF  |  | ******                  |  | •             | save this file  | . What's the risk       | ?                | t the source, u  | o not open i                |
|  |                           |                                | ADDRESS OF THE OWNER   | ÷.         | And a second sec |  | No. of Concession, Name |  |               |                 |                         |                  |  |                             |
|  |                           |                                | ACCRETION AND  | ÷.         | And and a second second  | And a local division of the local division o | *****                   |  | occurrence of | -               | entering and the second | and the second   | and the second s | our approxim                |
|  |                           | A REAL PROPERTY.               | NAMES AND ADDRESS OF   |            | STREET, STREET | AREAS .  | REAL PROPERTY.          |  | COLUMN 1      |                 | DESIGNATION OF          | ARCON .          | ******   | OR ADDRESS                  |
|  | -                         | A REPORTED                     | STREET, STREET |            | RANGESING.   | STATUTE.   | STATES.                 |  | COLUMN 1      | COLUMN 2 IS NOT | DESCRIPTION OF          | OCCUPANCE.       | REAL PROPERTY.   | IN ADDRESS                  |
|  |                           |                                | ARABAM PARA  |            | RECEIPTION OF THE OWNER.   | RECORD.  | ADDRESS.                | -  | OCCUPATION N  |                 | ADDRESS OF T            | NAMES OF TAXABLE | RADARAS  | IN ADDRESS                  |
|  | 0. KOROOOKOOKOO           |                                | ADDRESS OF TAXABLE PARTY.  |            | ADDRESS OF ADDRESS   | KINDON.  | ADDIDO.                 | 000000000000000000000000000000000000000  | OCCUPATION N  |                 | 000000000               | 00000            |  | DER NOOME                   |
| ale  |                           |                                |  |            |  | 500 225  | 650 094                 |  |               |                 |                         |                  |  |                             |

- 5. The CSV downloaded contains all records matched by the search criteria, regardless of pagination. The following fields are included in the CSV download:
  - Lead Participant ID
  - Measure Detail ID
  - Record Begin Date
  - Record Date
  - Lead Participant Measure Detail ID
  - Measure Detail Name
  - Measure ID
  - Distribution Company ID
  - Aggregation Flag
  - Number of Aggregation
  - Installation Date
  - First Month in Market
  - Measure Life
  - Measure Expiration Date
  - Program Name
  - Sector

- End Use
- Custom End Use
- Asset ID
- Resource ID
- Load Zone ID
- Retail Customer Name
- Street
- City
- State
- Zip
- Reference Document Name
- Measure Reference Code
- Monthly kW Summer
- Monthly kW Winter
- Updated By
- Updated Date



### IMPORTANT

If Measure Detail Data is downloaded from EEM in order to make edits and then re-upload with changes, make sure that the columns are reordered to match the format outlined in "<u>CSV Upload</u>" on page 24.

# 2.3 Demand Reduction Reporting

On June 1, 2017, EEM became the primary source of energy efficiency On-Peak and Seasonal Peak asset demand reduction values as reported in CAMS.

## 2.3.1 Demand Reduction Reporting Requirement

Participants must report demand reduction values for all months for each energy efficiency On-Peak and Seasonal Peak asset through CAMS as outlined in *ISO New England Manual for Market Rule 1 Accounting, M-28*.

Demand reduction values must be submitted for both initial and final settlement for each month, and a supporting document is required with each submission outlining the calculation used to arrive at the entered value. Data submissions for initial settlement are due by 13:00 on the third business day after the last operating day of the settlement month; the data reconciliation submittal deadline is at 17:00 on the 70<sup>th</sup> calendar day after day 1 of the month following the settlement month.

Prior to June 1, 2017, a variety of supporting documents were acceptable to confirm the submitted value. Beginning June 1, 2017, the kW totals for each asset contained in the EEM became the only acceptable source for data submissions. Supporting documents are still required, but the only acceptable submissions are screenshots from the EEM reflecting the entered values.



#### **IMPORTANT**

Starting on June 1, 2017, the demand reduction kW value entered in CAMS for each asset <u>must match</u> the appropriate seasonal kW value for the asset in EEM.

## 2.3.2 Demand Reduction Supporting Document

Beginning June 1, 2017, the only acceptable supporting documents that may be submitted with demand reduction values in CAMS are screenshots from EEM. The following steps should be taken to capture the correct values in a screenshot.

1. From the Search screen of EEM enter the appropriate Asset ID and select as "Market Month" the first day of the month under review. Make sure that the "As Of Date" field is a date within the Customer Data Submittal Window as outlined above. Then select "Search."

| Energy Efficiency Measure Database           |                              |                 |                    |        |  |  |  |
|--|------------------------------|-----------------|--------------------|--------|--|--|--|
| Search Add Measure Detail Upload CSV Pending |                              |                 |                    |        |  |  |  |
| Search Criteria                              |                              |                 |                    |        |  |  |  |
| As Of Date: 07/06/2017                       | Retail Customer Name:        | Program Name:   | Market Month: 06/0 | 1/2017 |  |  |  |
| ISO Measure Detail ID:                       | Asset ID: XXXXXXXXXXXXXXXXXX | Reference Code: | Min Installation:  |        |  |  |  |
| Lead Participant: XXXXXXXXXXXXXXXXX          | Resource ID:                 | City:           | Max Installation:  |        |  |  |  |
| LP Measure Detail ID:                        | Load Zone ID:                | State:          | Min Expiration:    |        |  |  |  |
| Sector/End Use:                              |                              |                 | Max Expiration:    |        |  |  |  |
|  | Search                       | Reset           |                    |        |  |  |  |

2. A screenshot should be taken of the first results page. Capture all of the search criteria, as well as the Summer kW and Winter kW totals. It may be necessary to expand the width of these two columns to ensure that the full kW value displays on the screen. Important fields to capture are highlighted in the image below:

|   |  |   | easur  | e Data   | iba  | se   |   |  |  |  |   |  |  |   |   |
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| h Add Measu   | ire Detail   | Upload CSV Pe   | nding  |  |  |  |   |  |  |  |   |  |  |   |   |
| earch Criteria  |  |   |  |  |  |  |   |  |  |  |   |  |  |   |   |
| 4   | As Of Date   | : 07/06/2017  |  | Retail Cus   | tomer I  | Name:  |   |  | Program  | Name:  |   |  | Mar  | ket Month: 0  | 6/01/2017   |
| ISO Measure   | Detail ID  |   |  |  | Ass  | et ID: XXXX  | (XXXXXXXXX)   | (XX  | Reference  | e Code:  |   |  | Min I  | nstallation:  |   |
| Lead P  | articipant   | * *******   | xxxxx 💙  |  | Resour   | ce ID:   |   |  |  | City:  |   |  | Max I  | nstallation:  |   |
| LP Measure  | Detail ID  |   |  | L  | oad Zoi  | ne ID:   |   |  |  | State:   |   |  | Min I  | Expiration:   |   |
| Sector  | /End Use   | :   | ~  |  |  |  |   |  |  |  |   |  | Max  | Expiration:   |   |
| ad<br>rticipant(ID)   | Measure<br>Detail ID                                       | Measure<br>Detail Name  | Installation   | First Month  | Life   | Expiration   | Summer<br>kW  | Winter   | Load Zone(II   | Resource(ID)   | Asset(ID)   | Program  | End Use  | Customer  | Pending   |
| racipant(ID)  | LATER ALL LA   |   | 1 A 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4  | I I I I I I I I I I I I I I I I I I I  |  |  | D.Y.Y   |  |  |  |   | N D D D D  |  |   | Change  |
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3. Save the screenshot in one of the following formats that are compatible with CAMS upload: \*.doc, \*. pdf, \*.xlsx.

# **3 Customer Support**

# 3.1 By Internet



https://www.iso-ne.com/participate/support

# 3.2 By Telephone



#### **Days of Operation**

During Regular Business Hours, Monday through Friday: 8:00 A.M. to 5:00 P.M. ET: (413) 540-4220

The Customer Support Hotline is **NOT** staffed on the following days:

- New Year's Day
- Martin Luther King Day
- Presidents' Day
- Good Friday
- Memorial Day
- Independence Day
- Labor Day
- Columbus Day
- Veterans Day
- Thanksgiving Day
- Day after Thanksgiving
- Christmas Day

For after-hours business emergencies, contact Customer Support at (877) 226-4814 (pager).

# 3.3 By Email



custserv@iso-ne.com

# 3.4 Ask ISO



Ask ISO is available to market participants who have a valid digital certificate and who have been assigned the role of "Ask ISO / External User" by their Security Administrator.

Ask ISO is located at: <u>https://www.iso-ne.com/about/contact/customer-support</u>.

# 4 Links

# 4.1 ISO New England Home Page

https://www.iso-ne.com

# 4.2 ISO New England Training Page

https://www.iso-ne.com/participate/training

# 4.3 ISO New England FAQ Page

https://www.iso-ne.com/participate/support/faq

## 4.4 SMD Site for ISO Applications

https://smd.iso-ne.com/

## 4.5 SMD Site for ISO Sandbox Applications

https://sandboxsmd.iso-ne.com/

# 4.6 ISO New England Glossary and Acronyms

https://www.iso-ne.com/participate/support/glossary-acronyms

# **5** Reference Tables

# 5.1 Table 1: EEM Security Roles

| CAMS<br>Role                  | Activities Allowed   | Pertinent Sections in User Guide   |
|-------------------------------|--|--|
| External<br>EEM<br>Viewer     | <ul> <li>Search for data for<br/>any Measure Detail<br/>that the Lead<br/>Participant owns</li> <li>View data for any<br/>Measure Detail that<br/>the Lead Participant<br/>owns</li> </ul>   | <ul> <li>"Get Started" (page 8)</li> <li>"Manage Energy Efficiency Measures"<br/>(page 14)</li> <li>"Measure Detail Search" (page 29)</li> <li>"View Measure Detail" (page 34)</li> <li>"View Measure Detail History" (page 37)</li> <li>"View Pending Changes" (page 51)</li> <li>"View Pending Measure Detail" (page 54)</li> <li>"CSV Download" (page 57)</li> </ul>  |
| External<br>EEM<br>Maintainer | <ul> <li>Upload/update data<br/>for any Measure<br/>Detail that the Lead<br/>Participant owns</li> <li>Search for data for<br/>any Measure Detail<br/>that the Lead<br/>Participant owns</li> <li>View data for any<br/>Measure Detail that<br/>the Lead Participant<br/>owns</li> </ul> | <ul> <li>"Get Started" (page 8)</li> <li>"Manage Energy Efficiency Measures"<br/>(page 14)</li> <li>"Add Measure Detail" (page 18)</li> <li>"Measure Detail Search" (page 29)</li> <li>"View Measure Detail" (page 34)</li> <li>"View Measure Detail History" (page 37)</li> <li>"Update Measure Detail" (page 40)</li> <li>"View Pending Changes" (page 51)</li> <li>"View Pending Measure Detail" (page 54)</li> <li>"CSV Download" (page 57)</li> </ul> |

# 5.2 Table 2: EEM Fields, Definitions and Validation Rules

| Field                      | Definition  | Rules   |
|----------------------------|---|---|
| Lead Participant ID        | Customer Name and ID for user   | Not Editable. System generated.   |
| ISO Measure Detail<br>ID   | Each ISO Measure Detail ID<br>is unique throughout the<br>EEM   | Not Editable. System generated after successful creation of Measure Detail.   |
| LP Measure Detail ID       | Provides participant with<br>key field to match with<br>their database                                  | Required. Alphanumeric values accepted.<br>Limited to 100 characters.<br>Must be unique to Lead Participant.  |
| Record Begin Date          | Date the version of the data<br>set for a Measure Detail<br>became effective                            | System generated using the system date and<br>time at the point that the version of the data<br>was written to the database.  |
| Record End Date            | Date the version of the data<br>record for a Measure Detail<br>ends; always null for<br>current version | System generated.   |
| Measure Detail<br>Name     | Name of Measure Detail<br>installed   | Required. Alphanumeric values accepted.<br>Limited to 100 characters.   |
| Distribution<br>Company ID | ID of distribution company<br>where Measure Detail is<br>located  | Required if Aggregation is 'N' and either<br>Monthly kW Summer or Monthly kW Winter<br>>= 10kW. Only numeric values accepted.<br>Request from ISO if needed.  |
| Installation Date          | Date Measure Detail was<br>installed  | Required. Must be a valid date in<br>MM/DD/YYYY format, after June 16, 2006<br>and prior to the current system date.<br>If more than three years prior to the current<br>system date, the new Measure Detail will be<br>put into Pending and will require ISO review<br>before being applied. |
| First Month in<br>Market   | First month savings can be<br>reported for the Measure<br>Detail  | Derived by the system based on Measure<br>Installation Date and the initial performance<br>month resettlement date. Always the first<br>day of a month.   |
| Measure Life               | Measure Detail life in years  | Required. Must be numeric, with at most one decimal place. Cannot be greater than ISO defined maximum (currently 30 years).   |
| Measure Expiration<br>Date | Month, day and year the<br>Measure Detail will have<br>reached its end of useful life                   | Not editable. System calculated using<br>Installation Date and Measure Life. Set as the<br>first day of the last month that the measure<br>detail contributes to demand reduction.  |

| Field   | Definition  | Rules  |
|---|---|--|
| Program Name                                    | Name of the program in<br>which the Measure Detail<br>belongs                                 | Required. Alphanumeric values accepted.<br>Limited to 100 characters.  |
| Sector  | Sector applicable to<br>Measure Detail  | Required. Limited to values in Table 5.3.  |
| End Use   | Describes type of measure   | Required. Limited to values in Table 5.3.<br>Custom measure option for each sector.  |
| Custom End Use                                  | Used when Custom End Use<br>is chosen or for elaboration<br>of non-custom Measure<br>Details  | Required if a "Custom Measure" option is<br>chosen for End Use. Limited to 100<br>characters.  |
| Aggregation                                     | Flag that indicates if<br>multiple end uses are<br>aggregated into a single<br>Measure Detail | Required. Limited to 'Y' and 'N'.  |
| Number of<br>Aggregation<br>(Aggregation Count) | Number of end uses<br>aggregated into a single<br>Measure Detail                              | Required. Only editable if Aggregation value<br>is 'Y'. Must be greater than zero. Defaults to<br>1 if Aggregation = N.<br>Rounded to the nearest whole number using<br>standard rounding rules.<br>Limited to seven digits. |
| Monthly kW<br>Summer                            | Calculated kW savings from<br>Measure Detail for a<br>summer month                            | Required. Only numeric values accepted. If<br>Aggregation value is 'Y', the kW value divided<br>by Number of Aggregation must be less than<br>10kW.<br>Rounded to three decimal places using<br>standard rounding rules.     |
| Monthly kW Winter                               | Calculated kW savings from<br>Measure Detail for a winter<br>month                            | Required. Only numeric values accepted. If<br>Aggregation value is 'Y', the kW value divided<br>by Number of Aggregation must be less than<br>10kW.<br>Rounded to three decimal places using<br>standard rounding rules.     |
| CAMS Measure ID                                 | CAMS Measure ID used to<br>represent full set of<br>Measure Details                           | Required. Alphanumeric values accepted.<br>Must be an On-Peak or Seasonal Peak CAMS<br>measure that belongs to Lead Participant<br>entering Measure Detail.  |
| Asset   | CAMS Asset associated with the Measure Detail   | Not editable. System generated based on value chosen for CAMS Measure ID.  |
| Resource  | CAMS Resource associated with the asset   | Not editable. System generated based on value chosen for CAMS Measure ID.  |
| Load Zone                                       | Load Zone where the resource is located   | Not editable. System generated based on value chosen for CAMS Measure ID.  |

| Field                      | Definition   | Rules   |
|----------------------------|--|---|
| Retail Customer<br>Name    | Name of retail customer for<br>Measure Detail  | Required if Aggregation is 'N' and either<br>Monthly kW Summer or Monthly kW Winter<br>>= 10kW. Alphanumeric values accepted.<br>Limited to 100 characters.   |
| Street                     | Street address where the<br>Measure Detail is located  | Required if Aggregation is 'N' and either<br>Monthly kW Summer or Monthly kW Winter<br>>= 10kW. Alphanumeric values accepted.<br>Limited to 50 characters.  |
| City                       | City where the Measure<br>Detail is located  | Required if Aggregation is 'N' and either<br>Monthly kW Summer or Monthly kW Winter<br>>= 10kW. Alphanumeric values accepted.<br>Limited to 50 characters.  |
| State                      | State where the Measure<br>Detail is located   | Required if Aggregation is 'N' and either<br>Monthly kW Summer or Monthly kW Winter<br>>= 10kW. Limited to the six New England<br>states.   |
| Zip Code                   | Zip code where the<br>Measure Detail is located  | Required if Aggregation is 'N' and either<br>Monthly kW Summer or Monthly kW Winter<br>>= 10kW. Five digits.  |
| Reference Document<br>Name | Name and version of the<br>document from which<br>Measure Detail savings and<br>measure life information is<br>taken   | Required. Alphanumeric values accepted.<br>Limited to 100 characters.   |
| Measure Reference<br>Code  | Code for Measure Detail as<br>it appears in reference<br>document cited  | Required. Alphanumeric values accepted.<br>Limited to 100 characters.   |
| Updated Date               | Date that this version of the<br>Measure Detail was created  | Not Editable. System generated.   |
| Updated By                 | The user that created this<br>version of the Measure<br>Detail's data  | Not editable. Generated using the name associated with the certificate of the user.   |
| Comments                   | Free form field for Lead<br>Participant comment entry.<br>The main purpose of this<br>field is expected to be for<br>descriptions of why an<br>update is being done. | Required if the Measure Detail is Closed and<br>a change was made to Installation Date,<br>Measure Life (yrs), Monthly kW Summer,<br>Monthly kW Winter, or Measure.<br>Limited to 4,000 characters. |

# 5.3 Table 3: Sectors/End Uses

| SECTOR TYPE | PROGRAM NAME                   | END USE TYPE        |
|-------------|--------------------------------|---------------------|
| RESIDENTIAL | BEHAVIOR                       | RES_BEHAVIOR        |
| RESIDENTIAL | CUSTOM MEASURES                | RES_CUSTOM          |
| RESIDENTIAL | ENERGY STAR <sup>®</sup> HOMES | RES_ENERGY_STAR     |
| RESIDENTIAL | ENVELOPE                       | RES_ENVELOPE        |
| RESIDENTIAL | HOME ENERGY SERVICES           | RES_ENERGY_SERVICES |
| RESIDENTIAL | HOT WATER                      | RES_HOT_WATER       |
| RESIDENTIAL | HVAC                           | RES_HVAC            |
| RESIDENTIAL | LIGHTING                       | RES_LIGHTING        |
| RESIDENTIAL | PROCESS                        | RES_PROCESS         |
| RESIDENTIAL | REFRIGERATION                  | RES_REFRIGERATION   |
| LOW INCOME  | BEHAVIOR                       | LOW_BEHAVIOR        |
| LOW INCOME  | CUSTOM MEASURES                | LOW_CUSTOM          |
| LOW INCOME  | HOT WATER                      | LOW_HOT WATER       |
| LOW INCOME  | ENVELOPE                       | LOW_ENVELOPE        |
| LOW INCOME  | HOME ENERGY SERVICES           | LOW_ENERGY_SERVICES |
| LOW INCOME  | HVAC                           | LOW_HVAC            |
| LOW INCOME  | LIGHTING                       | LOW_LIGHTING        |
| LOW INCOME  | PROCESS                        | LOW_PROCESS         |
| LOW INCOME  | REFRIGERATION                  | LOW_REFRIGERATION   |
| COMMERCIAL  | BEHAVIOR                       | COM_BEHAVIOR        |
| COMMERCIAL  | COMPRESSED AIR                 | COMPRESSED_AIR      |
| COMMERCIAL  | CUSTOM MEASURES                | COM_CUSTOM          |
| COMMERCIAL  | ENVELOPE                       | COM_ENVELOPE        |
| COMMERCIAL  | FOOD SERVICE                   | COM_FOOD_SERVICE    |
| COMMERCIAL  | HOT WATER                      | COM_HOT_WATER       |
| COMMERCIAL  | HVAC                           | COM_HVAC            |
| COMMERCIAL  | LIGHTING                       |                     |
| COMMERCIAL  | MOTORS/DRIVES                  | COM_MOTORS_DRIVES   |
| COMMERCIAL  | PROCESS                        | COM_PROCESS         |
| COMMERCIAL  | REFRIGERATION                  | COM_REFRIGERATION   |