

# 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 environment
Version 3.0	June 1, 2017	Updates including CSV Upload capability and requirement that EEM is source of record for monthly reporting

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# **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 Participant(ID) Deta	ure Measure il ID Detail Name	Installation First Month Date in Market	Life Measure Expi	Summer Winter Load Zone	(ID Resource(ID) Asset(I	D) Program End Use Name	Retail Customer Name Pending 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

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	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).

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Measu	re Detail 🎽 Pendi	ng History														
Measur	e Detail History															
Measure Detail ID	Record Begin Date	Record End Date	LP Measure Detail ID	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expiration Date	Summer kW	Winter kW	Measure (ID)	Program Name	End Use	Retail Customer Name	Aggregat Count	Updated 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.
	No.	ADDRESS OF TAXABLE PARTY.	ADDRESS OF TAXABLE PARTY.	Ministration of the	÷.	REAL PROPERTY AND INCOME.	ADDRESS.	10000	and a second sec		MINISTRATION &	approximitation of	ACCOUNTS OF	ADDRESS	ADDRESS.
	and the second	and the second second second second	and the second s	and a local division of the	÷.	wineter set and a set of the	ACCOUNTS OF	****	****		-	-	and the second second	and an and a second sec	and states
	-	and a second second second	ADDRESS OF THE OWNER.	ADDRESS OF TAXABLE	÷.	and the local division of	NUMBER OF	ALCO NO.	alatalatana ana		and a laboration of the labora	when the second s	alassista.	-	analasiana.
	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 Measure ID	Measure Detail ID	Lead Participant(ID)	LP Measure Detail ID	Measure Detail Name	Distribution Company ID	Measure Life	Program Name	Sector Type	End Use Type	Custom End Use	Aggregation Flag	Summer kW	Winter kW	Retail Customer Name	Street	City	State	Postal Code	Reference Doc Name	Reference Code	Comments	Installation Date	Appregation 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 leasure ID	Measure Detail ID	Lead Participant(ID)	LP Measure Detail ID	Measure Detail Name	Distribution Company ID	Measure Life	Program Name	Sector Type	End Use Type	Custom End Use	Appregation Flag	Summer kW	Winter kW	Retail Customer Name	Street	City	State	Postal Code	Reference Doc Name	Reference Code	Comments	Installation Date	Aggregation Count	
	X000000	10000000	X000000000X	10000000	**********	100000000	1000000	100000000	10000000000	X000000000	10000000	10000000	10000000	10000000	100000000000	X0000000 X0000000	XXXXXX XXXXXX	XX XX	X00000X	10000000	100000000	10000000	1000000000	000000	
	X00000X X0000X	10000000 10000000	X00000000X X00000000X	10000000 10000000	100000000000	100000000	X00000X X00000X	10000000	100000000000	100000000	10000000	10000000	10000000	10000000	x00000000000 000000000000	10000001 1000000	XXXXXX XXXXXXX	XX XX	XXXXXXXX XXXXXXXXX	10000000 10000000	100000000	10000000	1000000000	1000000 1000000	
	XXXXXXX XXXXXXXX	10000000	100000000	10000000	10000000000	10000000	1000001	10000000	10000000000	100000000	10000000	10000000	1000000	10100000	10000000000	1000000	X0000X X0000X	XX XX	300000X 300000X	1000000	10000000	10000000	X000000000 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 1000000	10000000	10000000000	100000000	10000000	10000000	10000000	10000000	10000000000	1000000	XXXXXX XXXXXX	XX	XXXXXXXX XXXXXXXX	1011000	100000000	1000000	1000000000	000000	
	X00000X X00000X	X0000000 X0000000	X00000000X X00000000X	10000000	1000000000000	100000000	1000000 1000000	x00000000 x00000000	1000000000000	100000000	100000000	10000000	X0000000 X0000000	100000000	100000000000	X000000X X000000X	X0000X X0000X	30X 30X	X00000K X00000K	10000000	x00000000 x00000000	10000000	XXXXXXXXXXXX XXXXXXXXXXXX	000000X	
	X00000	10000000	200000000	1000000		10000000	1000001	10000000	1000000000	100000000	10000000	1000000	10000000	10100000	1000000000	10000000	X0000X X0000X	XX 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 Mea	S sure ID	Measure Detail ID	Lead Participant(ID	LP Measure Detail ID	Measure Detail Name	Distribution Company ID	Measure Life	Program Name	Sector Type	End Use Type	Custom End Use	Aggregation Flag	Summer kW	Winter kW	Retail Customer Name	Street	City	State Po	stal Code	Reference Doc Name	Reference Code	Comments	Installation Date	Aggregation 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 X00X	
20	XXXX	XXXXXXX	1000000	XXXXXXXXXX	X0000000000000000000000000000000000000	200120120	**	XXXXXXXX	X3003000000000	X3003000	2010020100	x	X00000X	30030000	XXXXXXXXXXXXXX	*****	3003000	XX 2	XXXXXXX	XXXXXXXXX XXXXXXXXX	X 30 30 30 X	XXXXXXXXXX	X10130730X	XXX	
20	XXXXX	X00000X	X0000000 X0000000	X000000X X000000X	X0000000000000000000000000000000000000	X00000000 X00000000	XX XX	XXXXXXXXX XXXXXXXXXX	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	X0000000X	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	×	X000000X	30030030X 30030030X	X0000000000000000000000000000000000000	X00000X	2012000	XX ) XX )	XXXXXXXX	X3000000X	X0000000 X0000000	X000000X	X000000X X000000X	XXXX XXXX	
30 30	XIOOX XIOOX	XXXXXXXX XXXXXXXX	X0000000 X0000000	XXXXXXXXXX XXXXXXXXXXXX	X0000000000000000000000000000000000000	3000300300 3000300300	30X 30X	X000000X	300000000000	300000000 300000000	30000000000000000000000000000000000000	x x	X300300X X300300X	X003003000 X003003000	300300300300X	X00000X	300000	XX 3	2000000 2000000	X1003000X	X10000000 X0000000	30000000X	X00000000 X0000000	X00X X00X	
30 30	XXXXX	XXXXXXXXX XXXXXXXXX	XXXXXXXXX XXXXXXXXX	X0000000X X000000X	X0000000000000000000000000000000000000	30000000X	XX XX	X00000000X X0000000X	3000000000000	X00000000 X00000000	300300300000 3003000000	x x	XXXXXXXX XXXXXXXX	3000000X 3000000X	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	XXXXXXX XXXXXXX	300000 300000	XX 3 XX 3	XXXXXXX XXXXXXXX	X300000X X300000X	X0000000 X0000000	X0000000X X000000X	XXXXXXXXXX XXXXXXXXXX	XXXX XXXX	
30 30	XXXXXX	XIOCIOCX XIOCIOCX	XXXXXXXXX XXXXXXXXX	X0000000X X000000X	X0000000000000000000000000000000000000	X0000000X X0000000X	20X 20X	X000000X X000000X	X0000000000000000000000000000000000000	20000002	300000000	X	X00000X	20030000	XXXXXXXXXXXX	2000000	3003000	XX 7 XX 7	XXXXXXX	X X X X X X X X X X X X X X X X X X X	X00000000 X0000000	30030000X 30030000X	X100300000 X100300000	XXXX XXXX	
20 30	XOOOX XOOOX	X00000X	30030000 30030000	X000000X	30000000000000000000000000000000000000	300000000 300030000	XX XX	X000000X X000000X	X000000000	Error	and the Alignet Alignet						300000	XX 3	100000 100000	X300000X	X00000000 X00000000	3000000X 3000000X	X0000000 X0000000	XOX XXX	
20	XXXXX	X00000X	30030000	X000000X	300000000000X	30000000	300	3000000X	1000000000	The system	aiready contail 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 Participant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(IC	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change
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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 'articipant(ID)	Meas. Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending 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	
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	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.	
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	KOURS.	10000000000000	00000000	ADDRESS OF	ж.	ADDRESS OF	ROUGH.	10000		RECEIPTION AND ADDRESS OF	100000000	ALCO N.	100000000	ADDRESS.	
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	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
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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 Participant(ID)	- Measure Detail II	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID Resource(ID	) Asset(ID)	Program Name	End Use	Retail Customer Name	Pending 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	
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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 Participant(ID)													_
Search Results Lead Participant(ID)	• M	easure etail Name		Measure Detail ID Measure	st Month Harket	Life	Measure Exp Date	Summer kW	Winter kW	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
	2↑ Z↓	Sort Ascending Sort Descending Columns		Detail Name Installation Date	EXERCICE EXERCICE EXERCICE EXERCICE	X X X	KORONANA KORONANA KORONANA KARONANA	10000 10000 10000 10000	ANNAN ADDAN ADDAN ADDAN			EXCLUSION AND ADDRESS OF ADDRESS	CONSTRUCTORS ADDRESSOR	ADDRESS NORMALI ADDRESS NORMALI ADDRESS	ERICCIONICIO ENCLUERO DE LA COMPANSIÓN EXECUTION DE LA COMPANSIÓN EXECUTION DE LA COMPANSIÓN DE LA COMPANSIÓN EXECUTION DE LA COMPANSIÓN DE LA COMPANSIÓN EXECUTION DE LA COMPANSIÓN DE LA COMPANSIÓN EXECUTION DE LA COMPANSIÓN DE	80000 80000 80000 80000	•
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14 4 Page 1	of	이 이 지 않는		Load Zone(ID) Resource(ID)						-					Displaying	1 - 12 of	98
			<b>V</b>	Asset(ID) Program Name													
			V V	End Use Retail Customer													
			V	Pending 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 'articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change
	1000	100000000000000000000000000000000000000	00000000	1000033333	*	00000003	XXXXXX	10000	0000000000	000000000000000000000000000000000000000	1000000000	100000000	1003003		10000
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	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
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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 rticipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendir Chang
ad rticipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad rticipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad rticipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad rticipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad rticipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad rticipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad rticipant(ID)	Measu Detail	Measure     Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad rticipant(ID)	Measu Detail	Measure     Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer kW	Winter	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi
ad ticipant(ID)	Measu Detail	Measure     Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer kW	Winter	Load Zone(IC	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad tricipant(ID)	Measu Detail 8000 8000 8000 8000 8000 8000 8000 80	Measure     Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer kW	Winter	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad ticpant(ID)	Measu Detail 8000 8000 8000 8000 8000 8000 8000 80	Measure     Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer kW	Winter	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad (ID)	Measu Detail 8000 8000 8000 8000 8000 8000 8000 80	Measure     Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer kW	Winter	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad tricipant(ID)	Measu Detail 88888 88888 88888 88888 88888 88888 8888	Measure     Detail Name	Installation Date	First Month in Market	Life	Measure Expl	Summer kW	Winter	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pendi Chan
ad tridopant(ID)	Measu Detail XXXXX XXXXX XXXXX XXXXX XXXXX XXXXX XXXX	Measure     Detail Name	Installation	First Month in Market	Life	Measure Expl	Summer kW	650.084	Load Zone(ID	Resource(ID)	Asset(ID)	Program Name	End Use	Retail Customer 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: IP Heasure Letail ID: Sector/End Use: Hack Installation: Sector/End Use: Hack Expiration: 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 articipant(ID)</th> <th>Measu Detail</th> <th>Measure Detail Name</th> <th>Installation Date</th> <th>First Month in Market</th> <th>Life</th> <th>Measure Expi Date</th> <th>Summer kW</th> <th>Winter kW</th> <th>Load Zone(IC Re</th> <th>source(ID)</th> <th>Asset(ID)</th> <th>Program Name</th> <th>End Use</th> <th>Retail Customer Name</th> <th>Pending Change</th> <th></th>	ad articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(IC Re	source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
$ \begin{tabular}{  c c c c c c c c c c c c c c c c c c $	ad articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Exp Date	Summer kW	Winter kW	Load Zone(IC Re	source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
$ \frac{1}{1} = 1 + 1 + 1 + 1 + 1 + 1 + 1 + 1 + 1 + 1$	ead articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID Re	source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
	ad articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(IC Re	source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
	ad articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(IC Re	source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
$ \begin{array}{                                    $	ead articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(IC Re	:source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
	tad articipant(ID)	Measu Detail	, Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer kW	Winter kW	Load Zone(ID Re	:source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
	tad articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(ID Re	:source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	1
	ead articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi Date	Summer kW	Winter kW	Load Zone(IC Re	:source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
	ead articipant(ID)	Measu Detail	Measure Detai Name	Installation Date	First Month in Market	Life	Measure Expi	Summer kW	Winter	Load Zone(IC Re	:source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
	ead articipant(ID)	Measu Detail	Measure DetailName	Installation Date	First Month in Market	Life	Measure Expi	Summer kW	Winter kW	Load Zone(IC Re	esource(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
	ead articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer	Winter	Load Zone(IC Re	:source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
	ead articipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer kW	Winter	Load Zone(IIC Re	:source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending Change	
tale- 500 238, 600 084	zad artricipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer	Winter	Load Zone(IC Re	source(ID)	Asset(ID)	Program Name	End Use	Retail Customer Name	Pending	
stale: 590.238 650.084	ead articipant(ID)	Measu Detail 2005 2005 2005 2005 2005 2005 2005 200	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expi	Summer	Winter	Load Zone(ID Re	:source(ID)	Asset([D))	Program Name	End Use	Retail Customer Name	Pending	
550125 050101	rad rriricipant(ID)	Measu Detail	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expl Date	Summer	Winter kw	Load Zone(IC Re	:source(ID)	Asset(ID)	Program Name	End Use	Retail Customer 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 Detail I	Record Begin Date	Record End Date	Status	LP Measure Detail ID	Measure Detail Name	Installation Date	First Month in Market	Life	Measure Expiration Da	Summer kW	Winter kW	Measure (ID)	Program Name	End Use	Retail Customer Name	Aggregal Count	Updated 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 Deta	ure I ID	Lecord Begin Date	Record End Date	Status	LP Measur Detail ID	Measure Detail Name		Installation Date	First Month in Market	Life	Measure Expiration Da	Summer kW	Winter kW	Measure (ID)	Program Name	End Use	Retail Customer Name	Aggregat Count	Updated 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) NSTAR Electric Company (3)
Heasure Detail Pending History		
Measure Detail History		
Measure Detail ID Record Begin Date Record End Date Status LP Measure Detail ID Detail Name	Installation Pirst Month Life Measure Expansion Da Summer kW Winter kW Measure (ID)	Program Name End Use Retail Customer Count By
132 12/03/2014 CURRENT 30b_2013 01 Sort Ascending	)), Al Elec, Ol & Prop units + M 06/01/2013 08/01/2014 25 05/01/2038 0.01 2.738 NSTAR SEMA (33385)	A02a Resl HVAC N/A 108 EEM External EEM Maintainer 2 (999999508)
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)
The second secon	TTR	
Course -	Detail ID	
	V Record Booin Date	
	V Record End Date	
	V Record End Date	
	V Status	
	UP Measure	
	Detai ID	
	V Measure	
	Detail Name	
	V Instalation	
	Date	
	Prist Month	
	1 Hanes	
	V Meaning	
	Expiration Date	
	Summer kW	
	Winter kW	
	V Measure (ID)	
	V Program	
	Name	
	V End Use	
	V Retai	
	Customer	
	Name	
	Aggregation	
	Count	
	Updated	
	by	

## 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 Participant(ID)       Measure Detail Name       Installation       First Month In Market       Life       Measure Exp Date       Summer KWW       Winter       Load Zone(ID       Resource(ID)       Asset(ID)       Program Name       End Use       Retail Customer       Pending	Search Results															
Casa       Detail       Processing       <			Manager	Testellettes	Track Marsh		Married	0					Deserves		Retail	Deadlard
	ead 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
DEDUCTION DESCRIPTION DE LA DESCRIPTION DE															- Contract	
DEDEX_DEDEX_DESCR_UND_UND_UND_UND_UND_UND_UND_UND_UND_UND		*****		****	*****		*****	******	100000	*****		*****		*****	- Harrie	*****
DEFECUTION         DEFECUTION <thdefecution< th="">         DEFECUTION         DEFECUTI</thdefecution<>		XORONOK XORONOK		NORONORONORONO.	NORONORONORONO. NORONORONORONO.	×	HORONOMONOMONOM HORONOMONOMONOM	NORONOM NORONOM	NORCHORN. NORCHORN.	****		**********	10100000000000000000000000000000000000	NORONONOMIA NORONONOMIA		X0404040K X0404040K
DEFECUTION         DEFECUTION <thdefecution< th="">         DEFECUTION         DEFECUTI</thdefecution<>		XURDEDK XURDEDK XURDEDK	ACADADADADADADADADADADADADADADADADADADA	NORONONONONONON NORONONONONON NORONONONON	NORODORODORODOR NORODORODORODOR NORODORODORODOR	ж ж ж	NOROROROROROROROROROROROROROROROROROROR	XOXONON XOXONON XOXONON	NORONOM NORONOM NORONOM	NORORONORONORONOR NORORONORONORONOR NORORONORON			HORDRORDRORDRORDRORD HORDRORDRORDRORDRORD HORDRORDRORDRORDRORD	ROROROROR ROROROROR ROROROROR		NOADADAK NOADADAK NOADADAK
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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:

Energy Efficiency Measure D	atabase		
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:	■ 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		ICCOCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCC	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 Meas	s ure ID	Measure Detail ID	Lead Participant(ID)	LP Measure Detail ID	Measure Detail Name	Distribution Company ID	Measure Life	Program Name	Sector Type	End Use Type	Custom End Use	Aggregation Flag	Summer kW	Winter kW	Retail Customer Name	treet Cit	y State	Postal Code	Reference Doc Name	Reference Code	Comments	Installation Date	Aggregation 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- 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 Measure ID	Measure Detail ID	Lead Participant(ID)	LP Measure Detail ID	Measure Detail Name	Distribution Company ID	Measure Life	Program Name	Sector Type	End Use Type	Custom End Use	Appregation Flag	Summer kW	Winter kW	Retail Customer Name	Street	City	State	Postal Code	Reference Doc Name	Reference Code	Comments	Installation Date	Aggregation 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	
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	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 Measure II	Measure Detail ID	Lead Participant(ID)	LP Measure Detail ID	Measure Detail Name	Distribution Company ID	Measure Life	Program Name	Sector Type	End Use Type	Custom End Use	Aggregation Flag	Summer kW	Winter kW	Retail Customer Name	Rreet City	State	Postal Code	Reference Doc Name	Reference Code	Comments	Installation Date	Aggregation 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 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 Detail ID Da	stallation First ate in Ma	Month Measure arket Life	Measure Expiration Da Summer kW	Winter kW	Measure(ID)	Submitted Date
•	Measure 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 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 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 Detail ID	Installation Date	First Month in Market	Measure Life	Measure Expiration Da	Summer kW	Winter kW	Measure(ID)	Submitted Date
8	Measure 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 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 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 Detail ID	Installation Date	First Month in Market	Measure Life	Measure Expiration Da	Summer kW	Winter kW	Measure(ID)	Submitted Date
leasure 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 letail ID: 💷	00									
PENDING	100000000000000000000000000000000000000	X0000	10000000	X0000000	30000	10000000	30000	30000	100000000000000000000000000000000000000	12/11/2014
					Cancel					
	Add Measur nding Measur Status Status PENDING CURRENT Measure 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 Detail ID	Installation Date	First Month in Market	Measure Life	Measure Expiration Da	Summer kW	Winter kW	Measure(ID)	Submitted Date
	Mea Det	asure 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 Det	asure 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 Det	asure 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.
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- 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:

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- 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:

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h Add Measu	ire Detail	Upload CSV Pe	nding												
earch Criteria															
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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:	
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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 Role	Activities Allowed	Pertinent Sections in User Guide
External EEM Viewer	<ul> <li>Search for data for any Measure Detail that the Lead Participant owns</li> <li>View data for any Measure Detail that the Lead Participant owns</li> </ul>	<ul> <li>"Get Started" (page 8)</li> <li>"Manage Energy Efficiency Measures" (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 EEM Maintainer	<ul> <li>Upload/update data for any Measure Detail that the Lead Participant owns</li> <li>Search for data for any Measure Detail that the Lead Participant owns</li> <li>View data for any Measure Detail that the Lead Participant owns</li> </ul>	<ul> <li>"Get Started" (page 8)</li> <li>"Manage Energy Efficiency Measures" (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 ID	Each ISO Measure Detail ID is unique throughout the EEM	Not Editable. System generated after successful creation of Measure Detail.
LP Measure Detail ID	Provides participant with key field to match with their database	Required. Alphanumeric values accepted. Limited to 100 characters. Must be unique to Lead Participant.
Record Begin Date	Date the version of the data set for a Measure Detail became effective	System generated using the system date and time at the point that the version of the data was written to the database.
Record End Date	Date the version of the data record for a Measure Detail ends; always null for current version	System generated.
Measure Detail Name	Name of Measure Detail installed	Required. Alphanumeric values accepted. Limited to 100 characters.
Distribution Company ID	ID of distribution company where Measure Detail is located	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Only numeric values accepted. Request from ISO if needed.
Installation Date	Date Measure Detail was installed	Required. Must be a valid date in MM/DD/YYYY format, after June 16, 2006 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 review before being applied.
First Month in Market	First month savings can be reported for the Measure Detail	Derived by the system based on Measure Installation Date and the initial performance month resettlement date. Always the first 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 Date	Month, day and year the Measure Detail will have reached its end of useful life	Not editable. System calculated using Installation Date and Measure Life. Set as the first day of the last month that the measure detail contributes to demand reduction.

Field	Definition	Rules
Program Name	Name of the program in which the Measure Detail belongs	Required. Alphanumeric values accepted. Limited to 100 characters.
Sector	Sector applicable to Measure Detail	Required. Limited to values in Table 5.3.
End Use	Describes type of measure	Required. Limited to values in Table 5.3. Custom measure option for each sector.
Custom End Use	Used when Custom End Use is chosen or for elaboration of non-custom Measure Details	Required if a "Custom Measure" option is chosen for End Use. Limited to 100 characters.
Aggregation	Flag that indicates if multiple end uses are aggregated into a single Measure Detail	Required. Limited to 'Y' and 'N'.
Number of Aggregation (Aggregation Count)	Number of end uses aggregated into a single Measure Detail	Required. Only editable if Aggregation value is 'Y'. Must be greater than zero. Defaults to 1 if Aggregation = N. Rounded to the nearest whole number using standard rounding rules. Limited to seven digits.
Monthly kW Summer	Calculated kW savings from Measure Detail for a summer month	Required. Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Rounded to three decimal places using standard rounding rules.
Monthly kW Winter	Calculated kW savings from Measure Detail for a winter month	Required. Only numeric values accepted. If Aggregation value is 'Y', the kW value divided by Number of Aggregation must be less than 10kW. Rounded to three decimal places using standard rounding rules.
CAMS Measure ID	CAMS Measure ID used to represent full set of Measure Details	Required. Alphanumeric values accepted. Must be an On-Peak or Seasonal Peak CAMS measure that belongs to Lead Participant 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 Name	Name of retail customer for Measure Detail	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Alphanumeric values accepted. Limited to 100 characters.
Street	Street address where the Measure Detail is located	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Alphanumeric values accepted. Limited to 50 characters.
City	City where the Measure Detail is located	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Alphanumeric values accepted. Limited to 50 characters.
State	State where the Measure Detail is located	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Limited to the six New England states.
Zip Code	Zip code where the Measure Detail is located	Required if Aggregation is 'N' and either Monthly kW Summer or Monthly kW Winter >= 10kW. Five digits.
Reference Document Name	Name and version of the document from which Measure Detail savings and measure life information is taken	Required. Alphanumeric values accepted. Limited to 100 characters.
Measure Reference Code	Code for Measure Detail as it appears in reference document cited	Required. Alphanumeric values accepted. Limited to 100 characters.
Updated Date	Date that this version of the Measure Detail was created	Not Editable. System generated.
Updated By	The user that created this version of the Measure Detail's data	Not editable. Generated using the name associated with the certificate of the user.
Comments	Free form field for Lead Participant comment entry. The main purpose of this field is expected to be for descriptions of why an update is being done.	Required if the Measure Detail is Closed and a change was made to Installation Date, Measure Life (yrs), Monthly kW Summer, Monthly kW Winter, or Measure. 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