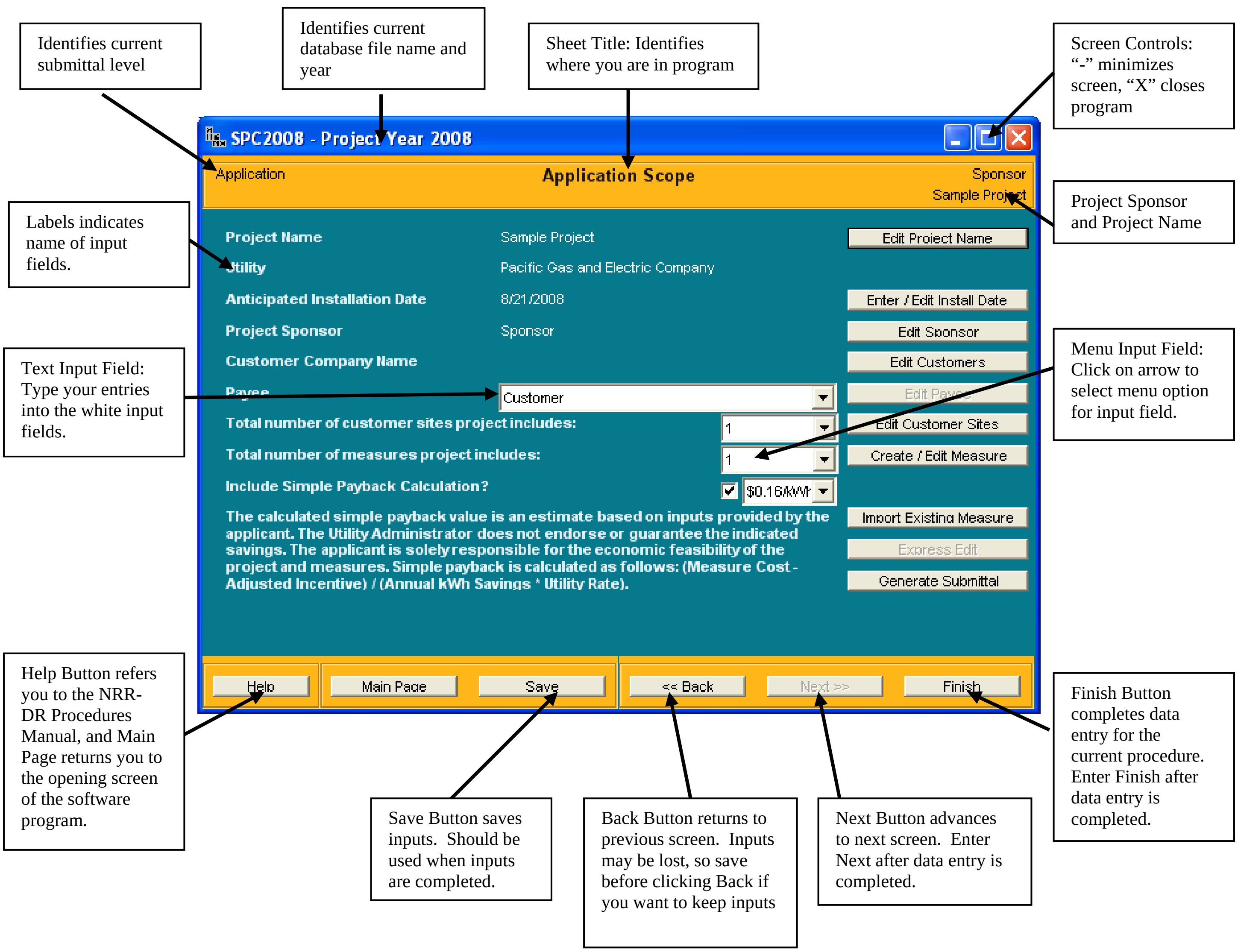
First-Time Users Guide

This guide is designed to show the first-time user how to complete an NRR-DR application using the NRR-DR 2008 Software. Before attempting to fill out the project application, the user should read the following sections of the 2008 NRR-DR Procedures Manual:

- Section 1, NRR Program Overview and Policies
- Section 2, DR Program Overview and Policies
- Section 3, Estimating Energy Savings and Incentives
- Section 5, Software Instructions

The 2008 NRR-DR Procedures Manual is available on the NRR-DR 2008 CD-ROM and can be printed out.

General Information: The NRR-DR 2008 Software uses a database to store the information on your projects. It is recommended that you install the program on a single machine and use that machine to process your applications. It is possible to move the data file, but it is not recommended to move from machine to machine on a routine basis. The mechanics of using the program are explained on the following screen.

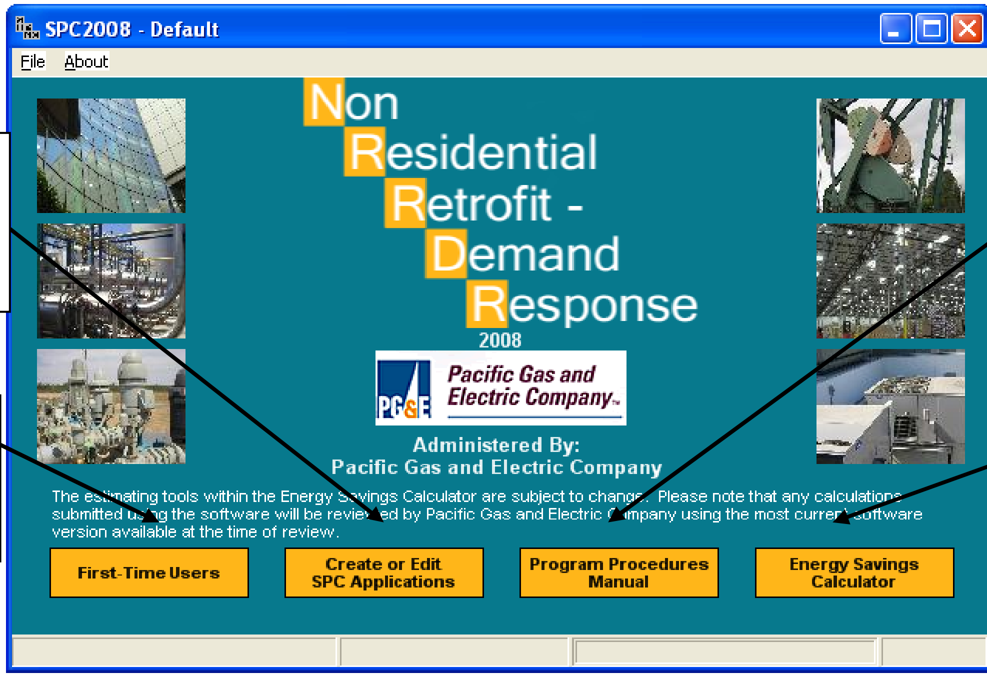


Main Page: After opening the software program, you will begin at the Main Page. Click on whichever of the four functions you wish to use.

Screen 1

Create new project applications or edit existing applications. This is the starting point for filling out applications.

Access the “First-Time Users Guide,” which provides helpful tips for new users.

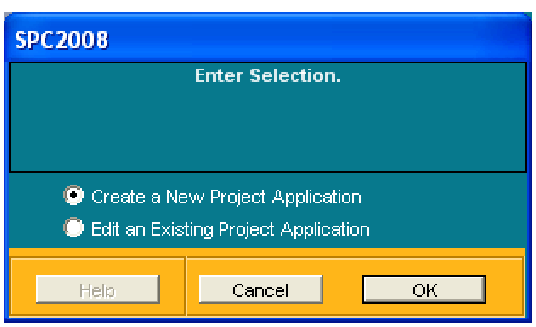


Procedures Manual, Appendices, and Forms in PDF format are available for review and printing.

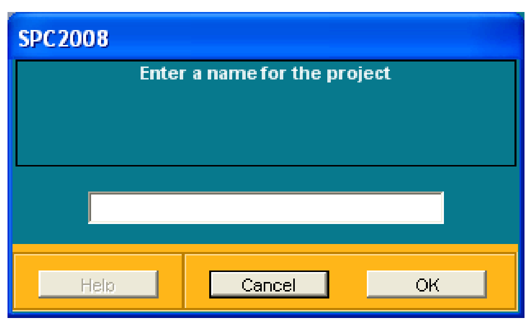
Energy Savings Calculator provides quick access to software tools for estimating energy savings.

Clicking the Create or Edit Applications button takes you to (Screen 2), where you are asked to select whether you want to create a new project application or edit an existing one. After choosing to create a new project, you will be shown several screens used to establish the new project. These include project name (Screen 3), and select existing, or enter project sponsor name (Screen 4).

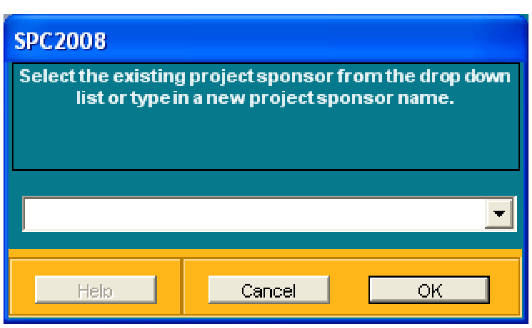
Screen 2



Screen 3

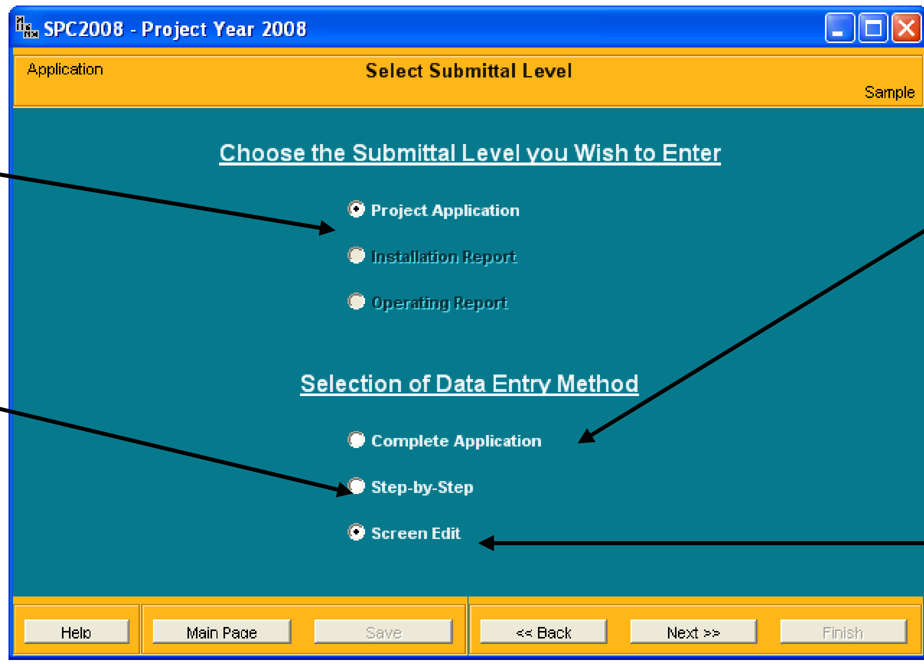


Screen 4



Select Submittal Level: Once this basic information about the project is established, you will be sent to Select Submittal Level (Screen 5). With a new application, you can only select "Project Application." After the Project Application has been submitted, you will be able to access "Installation Report." On this screen, you also select your preferred data entry method; see Section 5.4.2.3 of the *NRR-DR Procedures Manual* for details.

Screen 5



Submittal Level Allows you to select the current submittal level.

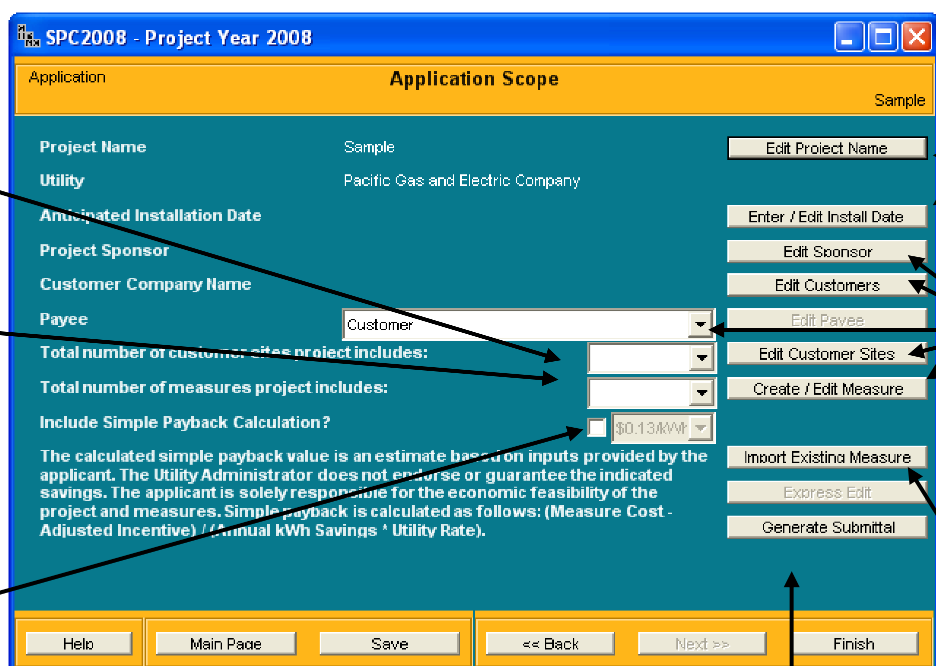
Step-by-Step allows you to select the area that you wish to edit, and then the software steps you through the screen(s) using dialog boxes to enter the data. Select the area you wish to edit from Application Scope (Screen 6).

Complete Application steps you through the entire application with dialog boxes. You simply provide the requested inputs and the program does the rest.

Screen Edit allows you to edit any field on a given screen. Select the area you wish to edit from Application Scope (Screen 6).

Application Scope: Application Scope (Screen 6) is where you define the scope of the project—number of Customers, sites, and measures—and access other screens for more details.

Screen 6



Enter the total number of sites for all customers combined.

Enter the total number of measures for all sites combined. If the same measure is proposed for two sites, it should be entered as two separate measures, one for each site.

Select the check box and electric rate to include the simple payback calculation.

Use these buttons to edit the project name, and anticipated installation date.

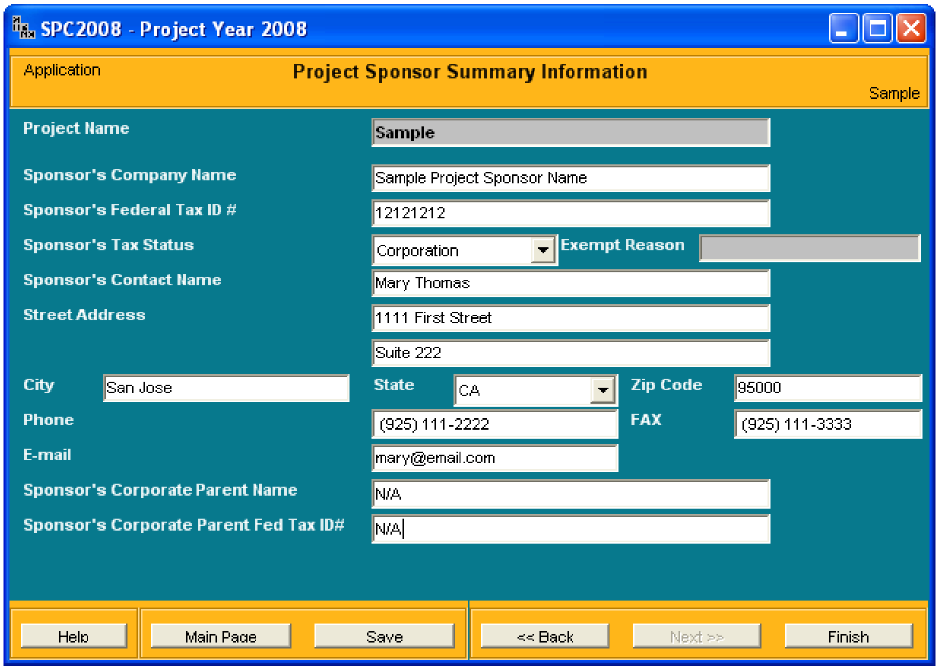
Use these buttons to go to input screens for Project Sponsor, Customer, Payee, sites, and measures. Details of these screens are described on the following pages.

Use this button to import pre-existing measures into this application.

Use this button to save, preview, email, or generate a submittal. It checks inputs for completeness prior to generating submittals. This button allows the user to email a copy to the Utility for pre-processing. **A signed hard copy and two copies must still be delivered to the Utility Administrator for application acceptance.**

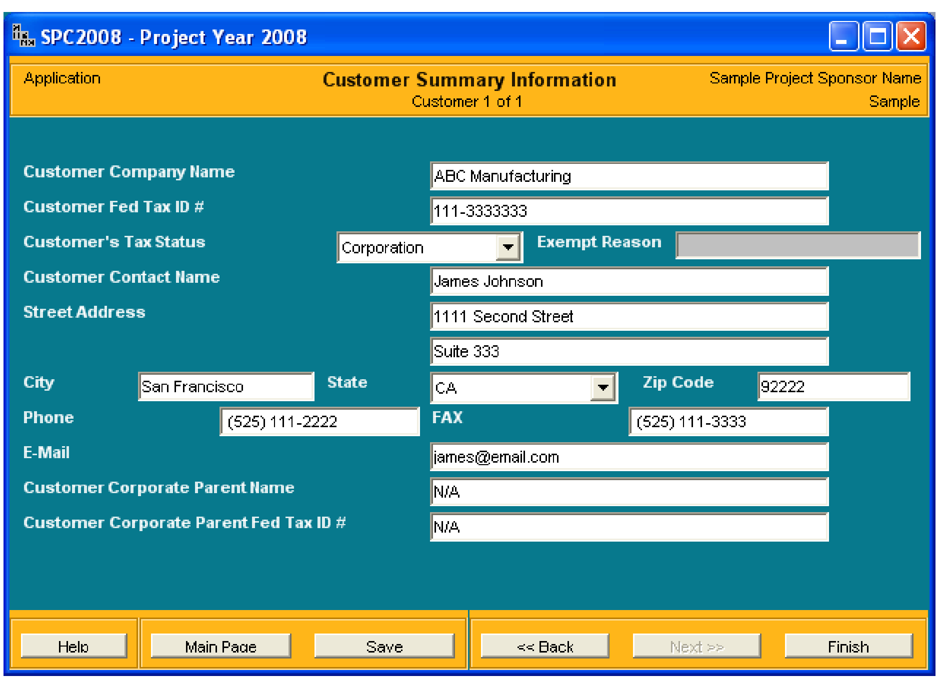
Project Sponsor Summary Information: Enter data on the Project Sponsor. A Corporate Parent is a company that owns the Project Sponsor. If this does not apply, enter N/A. This screen is accessed by clicking on the Edit Sponsor button on the Application Scope screen. Clicking “OK” returns you to that screen.

Screen 7



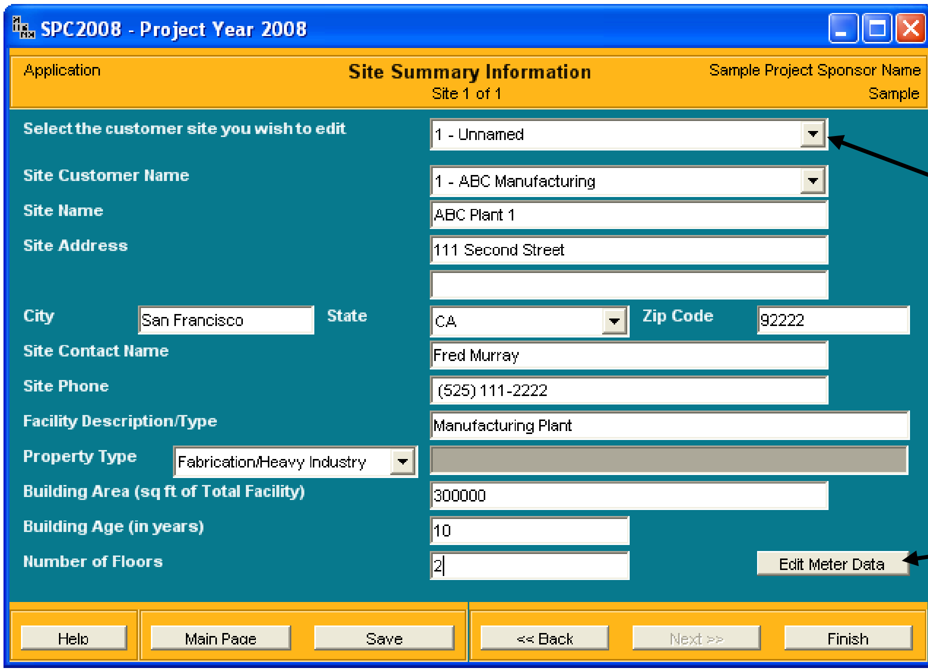
Customer Summary Information: Enter information on the Customer. A Corporate Parent is a company that owns the Customer. If this does not apply, enter N/A. This screen is reached by clicking the Edit Customers button on the Application Scope screen. Clicking “OK” returns you to that screen.

Screen 8



Site Summary Information: Enter general information on the Customer's site. This screen is reached by clicking on the Edit Customer Sites button on the Application Scope screen. Clicking "OK" returns you to that screen.

Screen 9

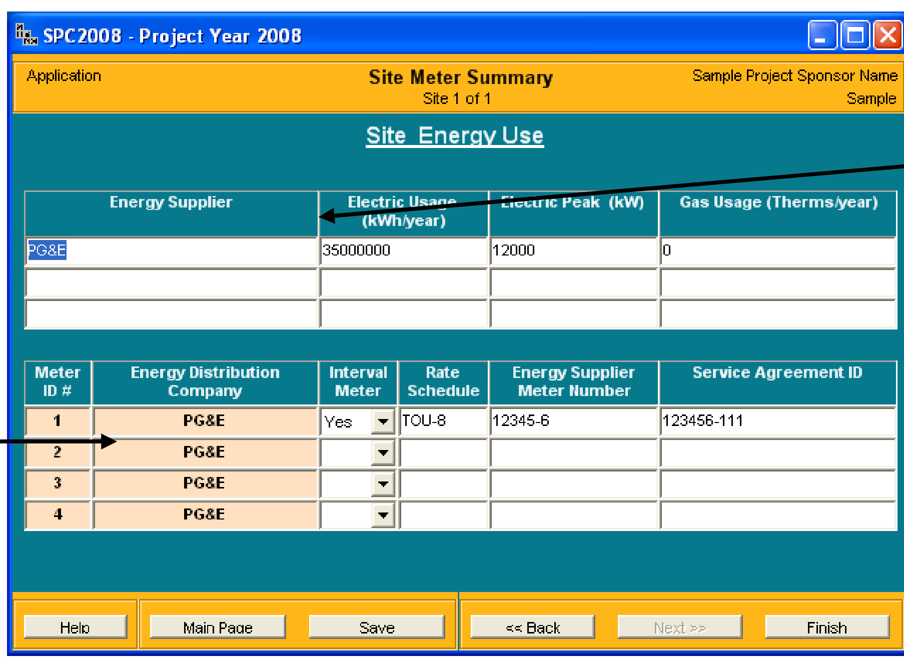


The top menu will list "1 – Unnamed" for the site until a site name has been entered on the following line. Note that the Customer name appears in its menu box. For multiple-Customer applications, be sure to select the correct Customer for the site.

After entering the basic site data, click on the Edit Meter Data button to enter data on the site's energy usage.

Site Meter Summary: Enter data on the site's energy usage. This information is normally available from the site's utility bills. This screen is reached by clicking "Edit Meter Data" on the Site Summary Information screen. Clicking "Finish" returns you to that screen.

Screen 10



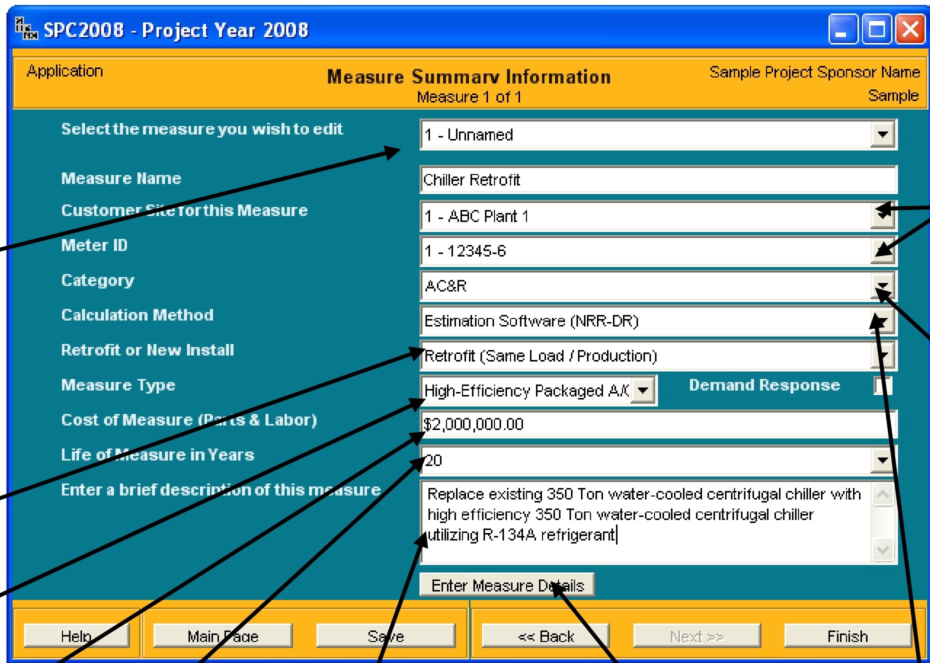
Energy Supplier is the company that provides the power used by the site. This may be the same as the Utility Administrator or may be a third-party provider.

Energy Distribution Company is the company that delivers the power used by the site. This is the Utility Administrator.

Measure Summary Information: Enter general information on the energy efficiency measure. This screen is reached by clicking on the Edit Measures button on the Application Scope screen. Clicking "OK" returns you to that screen.

Screen 11

Use this menu to select individual measures for data input. The menu will display the number of measures that were entered on the Application Scope screen. Until each measure is named (entered on line below), it is listed as:
1 – Unnamed,
2 – Unnamed, etc.



Use menu input fields to select the site and meter that this measure is associated with.

Select the measure type using the pull-down menu. If the measure is not specifically listed, use Lighting, AC&R, or Other, depending on the nature of the measure. See *2008 NRR-DR Procedures Manual* for details.

Use this menu to select type retrofit or new install.

Select the type of measure to be installed.

Enter the total cost of the measure. These costs include design, engineering, construction, materials, and fees, as well as the costs associated with participating in this program such as costs for completing the forms and conducting M&V.

Select the number of years of the measures predicted lifespan. If the Early Retirement procedure is indicated this field will be automatically entered by the software.

Enter a description describing the fundamental aspects of the measure.

After completing the inputs on this screen, click this button to advance to the Measure Details screen. Based on the inputs, the software selects the appropriate screen for your measure.

Use this pull-down menu to select your calculation method. The estimation software method is the simplest to use, but it is limited to select measures. Engineering calculations can be used for any measure, but require backup documentation. The Itemized Approach and the Early Retirement procedure are predetermined by the software based on user entered information. This information can be modified by selecting the modify approach button.

After completing all of the measures, use the Generate Submittal button on the Application Scope screen to have the software check the inputs and prepare the submittal. Here you may elect to "Save to File:", "Email:", "Preview", or "Submit to Utility" via email. If you need to stop while preparing the application, just save your inputs by clicking on the Save button and return to the Main Page, then click on the Exit button. Your work will be saved in the database and can be accessed by starting the software and selecting the Edit Existing Project option after clicking on the Edit/Create Application button.