

Overview of DHP Regional Database

Login instructions

- 1) Go to www.goingductless.com/partners and click on "Utility Database Login" under Utility Resources.
- 2) You will be directed to the regional database, prompting you to enter your Project-issued username and password. Please note that these fields are case sensitive.

Viewing and downloading data

- 1) Once logged in, you will see a menu bar on your left. To view data on activity in your utility territory, select "Installation Activity Reports" from this menu.
 - a. Utilities can select from seven different reports. For a description of each report, please see page 2 of this document.
- 2) After you have selected the desired report, your data will appear.
 - a. Please note that some reports have difficulty displaying large volumes of data within the limited display. To view data, you are encouraged to download the CSV.
 - b. Click on the column headers to sort data, and drag column lines to expand and compress different fields.
- 3) To export data, select 'CSV' from the upper left hand corner of the data table. The document download prompt will automatically open.

The screenshot shows the 'DUCTLESS HEAT PUMP PROJECT' web interface. On the left is a 'MAIN MENU' with options: Home, Installation Activity, and Reports. Under Reports, there are sub-options: All Approved Install Data, Pre-approved Homes, Pending, Ineligible, All Records, and QA Report. An arrow points from the 'CSV' link above the table to the 'All Approved Install Data' option in the menu. The main content area displays a table with 11 columns: ID Number, Category, Date Received, Date Published, Hea, Coc, Acc, Cus, Reb, Ho. The table contains 12 rows of data, all with 'Approved' status and dates from 2009-02-25 to 2009-05-19.

ID Number	Category	Date Received	Date Published	Hea	Coc	Acc	Cus	Reb	Ho
10249	Approved	2009-02-25	2009-02-25	1	1	116	Kar	104	360
10311	Approved	2009-04-01	2009-04-01	1	1	879	Joh		360
10312	Approved	2009-04-01	2009-04-01	1	1	639	Hek		360
10547	Approved	2009-04-28	2009-04-28	1	1	046	Stev		360
10602	Approved	2009-04-29	2009-04-29	1	1	432	Dor		360
10603	Approved	2009-04-29	2009-04-29	1	1	375	Gus	Gus	360
10604	Approved	2009-04-29	2009-04-29	1	1	138	Gar		360
10662	Approved	2009-05-06	2009-05-06	1	1	158	Reg		360
10666	Approved	2009-05-06	2009-05-06	1	1	532	G M		360
10723	Approved	2009-05-08	2009-05-08	1	1	763	Dor		360
10755	Approved	2009-05-19	2009-05-19	1	1	063	Linc		360
10758	Approved	2009-05-19	2009-05-19	1	1	092	Mikl		560

Username and password:

If you forget your username or password please click 'Forgot your username?' or 'Forgot your password?' on the left side of the menu bar on the login screen. This will prompt you to enter in the email address of the account holder, and will then send an email with the requested information.

If you have database questions or need web support, please contact:

Aaron Winer
503.688.1566
awiner@fluidms.com

Explanation of Installation Activity reports

NOTE: You may find that some data fields are blank. This is because certain information is not required on the Participation Forms, or because the form submitted was not the most recent version.

All Approved Install Data:

Provides a report of all Approved installed DHP records.

Pre-approved Homes:

This report includes all Pre-approved records.

Pending:

This report reflects the Homeowner Form was received and entered, but is missing some information that is required to Pre-Approve the record.

Ineligible:

This report provides you with a summary of Homeowner Participation and/or Contractor Invoice Forms that have been submitted to the Project for pre-approval or approval but do not meet the utility eligibility requirements.

QA Report:

This report contains all Quality Assurance inspections in your territory which can be filtered by a specific date range.

All Records:

This report contains every participation form received by the Project from a customer in your utility territory. Generating this report gives you the capability to view all records by category, such as Pre-approved, Approved, or Ineligible. When you open the CSV file, you can search by homeowner name or ID number to determine the status of a particular application.

BPA PTR Report:

This report contains all BPA records that have been approved by the Project and can be claimed in the PTR. This report is intended to facilitate entry of records into the PTR. The data provided by this report includes:

- RefNo, Street, City, State, Zip, UniqueID, Quantity, CompletedDate

PTR Bulk Upload Feature Instructions from a CSV file

Website: <http://ptr.nwcouncil.org/>

Using the following directions, you will **download** the template, **enter** the appropriate data for your measures, **create** a cart, if necessary, and **upload** your data. Please see below for instructions.

Download the Template:

- 1) Log in to the site, go to Your Account and select "Upload Deemed Measures to Shopping Cart"
- 2) Click on "Download this Template" and save the file to a folder on your computer.
- 3) Once you have the template saved, go to the DHP database and download the BPA PTR CSV.

The screenshot shows the website interface for the Ductless Heat Pump Project. On the left is a 'MAIN MENU' with options like Home, Installation Activity, Reports, Data, Pre-approved, Homes, Pending, Ineligible, All Records, and QA Report. In the center, there is a 'CSV' link. To the right of the 'CSV' link is a table with 12 columns: RefNo, Cus, Stree, City, State, Zip, Buildi, UniqueID, CTN, Sec, Quantity, and Los. The table contains 12 rows of data, all with a quantity of 1.

RefNo	Cus	Stree	City	State	Zip	Buildi	UniqueID	CTN	Sec	Quantity	Los
RHV03764		2427	Hoqu	WA	98550		10249			1	
RHV03764		8 Mat	Elma	WA	98541		10311			1	
RHV03764		720 2	Hoqu	WA	98550		10312			1	
RHV03764		163 F	Hoqu	WA	98550		10547			1	
RHV03764		6516	Aberc	WA	98520		10602			1	
RHV03764		1123	Cosrr	WA	98537		10603			1	
RHV03764		2 Sur	Monte	WA	98563		10604			1	
RHV03764		415 C	Monte	WA	98563		10662			1	
RHV03764		210 v	Aberc	WA	98520		10666			1	
RHV03764		918 F	Elma	WA	98541		10723			1	
RHV03764		4796	Aberc	WA	98520		10755			1	
RHV03764		166 C	Hoqu	WA			10758			1	

Enter the data:

- 1) You must copy and paste all data from the Project CSV file into the PTR template, with the exception of the column headers. Note: you may need to use "Paste Special" and "Text" if using another type of application.
- 2) Once all data has been pasted into the columns of the template, save as a name that you will remember and put in a folder you can find later.
- 3) Close the newly saved folder and proceed to the PTR site to upload the file to your shopping cart.
- 4) If you encounter any difficulties or have questions about the PTR upload process, please call Giorgio Shaunette at 866-329-5797 or email him the file you are trying to upload at ptrsupport@synergyhq.com.

Note: It is not possible to upload the DHP PTR database report to the PTR. It is required that you use the template on the PTR site and copy and paste the data you need from the BPA PTR CSV file into that template and then Save As. At this point you are able to upload it to the PTR.