

First-Time Users Guide

This guide is designed to show the first-time user how to complete an SPC application using the SPC2006 Software. Before attempting to fill out the project application, the user should read the following sections of the 2006 SPC Procedures Manual:

- Section 1, SPC Policy
- Section 2, Energy Savings
- Section 4, Software Instructions

The 2006 SPC Procedures Manual is available on the SPC2006 CD-ROM and can be printed out.

General Information: The SPC2006 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.

The screenshot shows a software window titled "SPC2006 - Project Year 2006". The main content area is titled "Customer Summary Information" and contains the following fields:

- Customer Company Name:** Acme Manufacturing
- Customer Fed Tax ID #:** 95-000000
- Customer's Tax Status:** Corporation (dropdown menu)
- Exempt Reason:** (grayed out)
- Customer Contact Name:** James Johnson
- Street Address:** 1234 West Covina Dr., Suite 1234
- City:** Covina
- State:** CA (dropdown menu)
- Zip Code:** 93456
- Phone:** (626) 111-1111
- FAX:** (626) 111-2222
- E-Mail:** jj@acme.com
- Customer Corporate Parent Name:** N/A
- Customer Corporate Parent Fed Tax ID #:** N/A

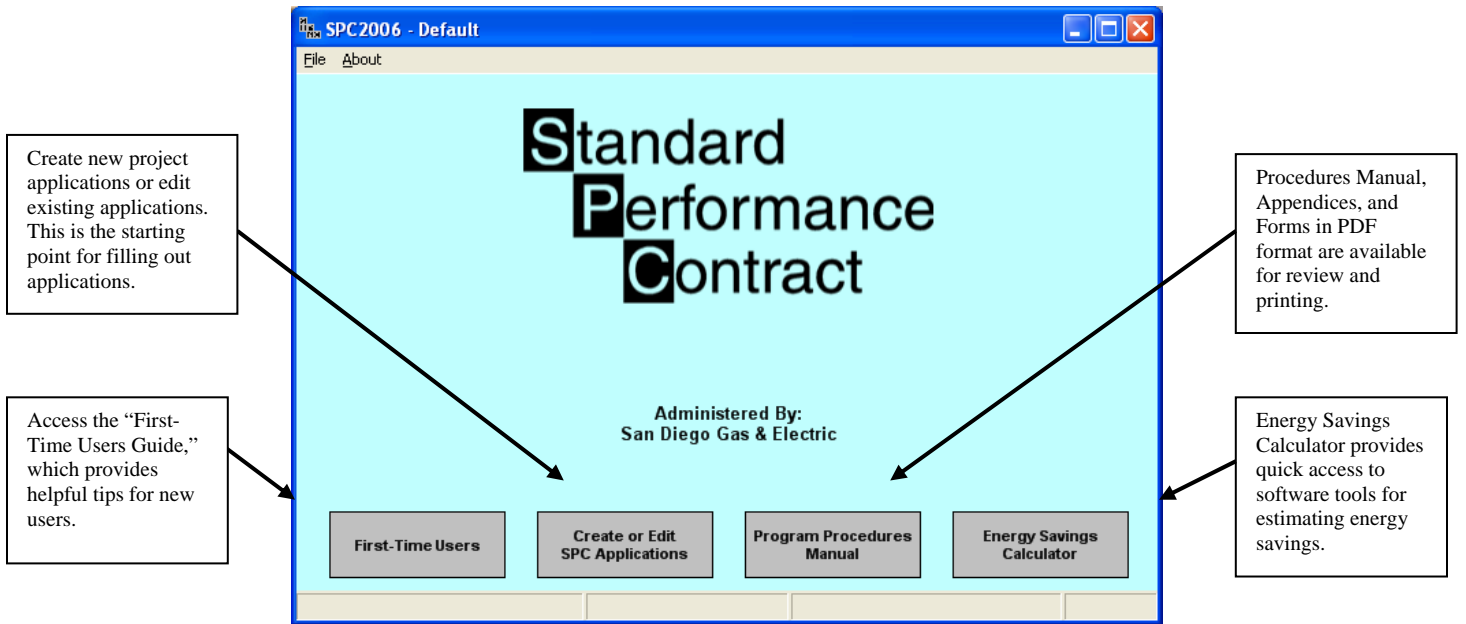
At the bottom of the window is a navigation bar with the following buttons: Help, Main Page, Save, << Back, Next >>, and Finish.

Callout boxes provide the following explanations:

- Identifies current submittal level:** Points to the "Application" label in the top left.
- Identifies current database file name and year (2001-2006):** Points to the window title "SPC2006 - Project Year 2006".
- Sheet Title: Identifies where you are in program:** Points to the "Customer Summary Information" title.
- Screen Controls: "-" minimizes screen, "X" closes program:** Points to the window control buttons in the top right.
- Project Sponsor and Project Name:** Points to the "Sample Project Sponsor" and "Sample Application" text in the top right.
- Color Text Boxes: Orange indicates labels and medium gray indicates input listings from other sheets.** Points to the orange labels and grayed-out "Exempt Reason" field.
- Text Input Field: Type your entries into the white input fields.** Points to a text input field.
- Menu Input Field: Click on arrow to select menu option for input field.** Points to the dropdown arrow for the "State" field.
- Help Button refers you to the SPC Procedures Manual, and Main Page returns you to the opening screen of the software program.** Points to the "Help" and "Main Page" buttons.
- Save Button saves inputs. Should be used when inputs are completed.** Points to the "Save" button.
- Back Button returns to previous screen. Inputs may be lost, so save before clicking Back if you want to keep inputs** Points to the "<< Back" button.
- Next Button advances to next screen. Enter Next after data entry is completed.** Points to the "Next >>" button.
- Finish Button completes data entry for the current procedure. Enter Finish after data entry is completed.** Points to the "Finish" button.

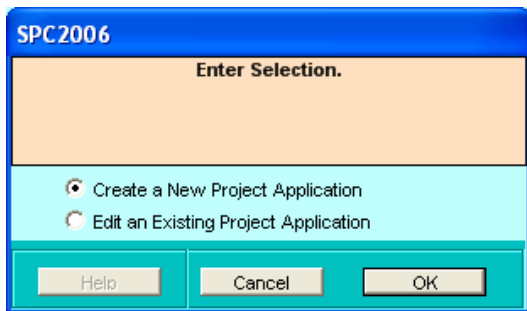
Main Page: After opening the software program, you will begin at the Main Page. Click on whichever of the four functions you wish to use.

Screen 1

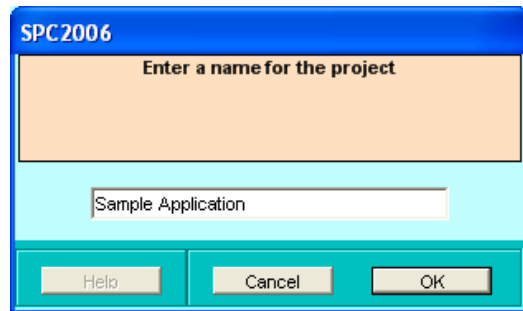


Clicking the Create or Edit Applications button takes you to (Screen 2), where you are asked to select whether you want to create a new project application or edit an existing one. After choosing to create a new project, you will be shown several screens used to establish the new project. These include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

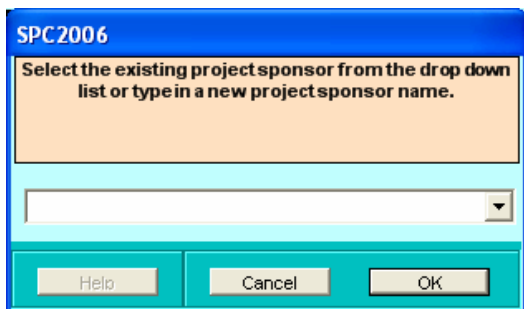
Screen 2



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 4.4.2.3 of the *SPC 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

Application		Project Sponsor Summary Information		Sample Project Sponsor Sample Application	
Project Name	Sample Application				
Sponsor's Company Name	Sample Project Sponsor				
Sponsor's Federal Tax ID #	95-000001				
Sponsor's Tax Status	Corporation	Exempt Reason			
Sponsor's Contact Name	Mary Thomas				
Street Address	123 1st Avenue Suite 12				
City	Worcester	State	MA	Zip Code	53423
Phone	(525) 111-2222	FAX	(232) 111-2222		
E-mail	maryt@sample.com				
Sponsor's Corporate Parent Name	Primary Corp				
Sponsor's Corporate Parent Fed Tax ID#	95-000002				

Help Main Page Save << Back Next >> Finish

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

Application		Customer Summary Information		Sample Project Sponsor Sample Application	
Customer 1 of 1					
Customer Company Name	Acme Manufacturing				
Customer Fed Tax ID #	95-000000				
Customer's Tax Status	Corporation	Exempt Reason			
Customer Contact Name	James Johnson				
Street Address	1234 West Covina Dr. Suite 1234				
City	Covina	State	CA	Zip Code	93456
Phone	(626) 111-1111	FAX	(626) 111-2222		
E-Mail	jj@acme.com				
Customer Corporate Parent Name	N/A				
Customer Corporate Parent Fed Tax ID #	N/A				

Help Main Page Save << Back Next >> Finish

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	Electric Usage (kWh/year)	Electric Peak (kW)	Gas Usage (Therms/year)
SCE	3500000	1200	0

Meter ID #	Energy Distribution Company	Rate Schedule	Energy Supplier Meter Number	Account Number / Service Agreement
1	SCE	TOU-8	12345-6	12345678
2				
3				
4				

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

SPC2006 - Project Year 2006

Application: **Measure Summary Information** Measure 1 of 1 Sample Project Sponsor: Sample Application

Select the measure you wish to edit: 1 - Unnamed

Measure Name: Chiller Retrofit

Customer Site for this Measure: 1 - Acme Plant 1

Meter ID: 1 - 12345-6

Category: AC&R

Calculation Method: Estimation Software (SPC)

Retrofit or New Install: Retrofit (Same Load)

Measure Type: High-Efficiency Packaged A/C or Chillers

Cost of Measure (Parts & Labor): \$200,000.00

Life of Measure in Years: 23

Enter a brief description of this measure: Replace existing 350 Ton water-cooled centrifugal chiller with high efficiency 350 Ton VSD water-cooled centrifugal chiller utilizing R-134A refrigerant.

Buttons: Help, Main Page, Save, << Back, Next >>, Finish

Callout Box 1 (Top Left): 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.

Callout Box 2 (Top Right): Use menu input fields to select the site and meter that this measure is associated with.

Callout Box 3 (Middle Right): 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 2006 SPC Procedures Manual for details.

Callout Box 4 (Middle Left): Use this menu to select type retrofit or new install.

Callout Box 5 (Bottom Left): Select the type of measure to be installed.

Callout Box 6 (Bottom Left): 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.

Callout Box 7 (Bottom Middle-Left): 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.

Callout Box 8 (Bottom Middle): Enter a description describing the fundamental aspects of the measure.

Callout Box 9 (Bottom Middle-Right): 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.

Callout Box 10 (Bottom Right): 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.