

First-Time Users Guide

This guide is designed to show the first-time user how to complete an SPC application using the SPC2009 Software. Before attempting to fill out the project application, the user should read the following sections of the 2009 SPC Procedures Manual:

- Section 1, SPC Program Overview and Policies
- Section 2, Estimating Energy Savings and Incentives
- Section 4, Software Instructions

The 2009 SPC Procedures Manual is available on the SPC2009 CD-ROM and can be printed out.

General Information: The SPC2009 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 the 'Customer Summary Information' screen in the SPC2009 software. The window title is 'SPC2009 - Project Year 2009'. The page header includes 'Application', 'Customer Summary Information', and 'Sample Project Sponsor Name'. The form contains the following fields:

- Customer Company Name: ABC Manufacturing
- Customer Fed Tax ID #: 111-22222222
- Customer's Tax Status: Corporation (dropdown), Exempt Reason (dropdown)
- Customer Contact Name: Mr Kringle
- Street Address: 1111 North Pole, Suite b
- City: Santa Maria, State: CA, Zip Code: 92141
- Phone: (800) 555-1212, FAX: () - -
- E-Mail: CKringle@snowmail.info
- Customer Corporate Parent Name: n/a
- Customer Corporate Parent Fed Tax ID #: n/a

Navigation buttons at the bottom include: Help, Home, Finish, Save, << Back, and Next >>. Callout boxes provide the following instructions:

- Identifies current submittal level:** Points to the 'Application' label.
- Identifies current database file name and year:** Points to the window title 'SPC2009 - Project Year 2009'.
- Sheet Title: Identifies where you are in program:** Points to the 'Customer Summary Information' header.
- Screen Controls: "-" minimizes screen, "X" closes program:** Points to the window control buttons.
- Project Sponsor and Project Name:** Points to the 'Sample Project Sponsor Name' and 'Sample Project Application' text.
- Labels indicates name of input fields:** Points to the 'Customer Company Name' label.
- Text Input Field: Type your entries into the white input fields:** Points to the 'City' input field.
- Menu Input Field: Click on arrow to select menu option for input field:** Points to the dropdown arrow for 'Exempt Reason'.
- 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' button.
- Finish Button completes data entry for the current procedure. Enter Finish after data entry is completed:** Points to the 'Finish' button.
- 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.

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

The screenshot shows the main interface of the SPC2009 software. At the top, it says "Standard Performance Contract" and "2009 SOUTHERN CALIFORNIA EDISON". Below that, it says "Administered By: Southern California Edison". There are four main buttons at the bottom: "First-Time Users", "Create or Edit SPC Applications", "Program Procedures Manual", and "Energy Savings Calculator".

Callout boxes provide the following information:

- First-Time Users:** Access the "First-Time Users Guide," which provides helpful tips for new users.
- Create or Edit SPC Applications:** Create new project applications or edit existing applications. This is the starting point for filling out applications.
- Program Procedures Manual:** Procedures Manual, Appendices, and Forms in PDF format are available for review and printing.
- Energy Savings Calculator:** 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

SPC2009
Enter Selection.

Create a New Project Application
 Edit an Existing Project Application

Buttons: Help, Cancel, OK

Screen 3

SPC2009
Enter a name for the project

Sample Project Application

Buttons: Help, Cancel, OK

Screen 4

SPC2009
Select the existing project sponsor from the drop down list or type in a new project sponsor name.

[Drop-down menu]

Buttons: Help, Cancel, OK

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

Select the type of customer this application is for.

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 Financial Analysis calculation, select the lower check box to use the default rate or enter a different rate in the textbox.

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

SPC2009 - Project Year 2009

Application: Project Sponsor Summary Information | Sample Project Sponsor Name: Sample Project Application

Project Name: Sample Project Application

Sponsor's Company Name: Sample Project Sponsor Name

Sponsor's Federal Tax ID #: 1212121212

Sponsor's Tax Status: Corporation | Exempt Reason: []

Sponsor's Contact Name: Spencer Conrad

Street Address: 8555 Aero Drive
Suites 205-6

City: San Diego | State: CA | Zip Code: 92123

Phone: (800) 555-1212 | FAX: [] [] []

E-mail: sconrad@mail.com

Sponsor's Corporate Parent Name: n/a

Sponsor's Corporate Parent Fed Tax ID#: n/a

Buttons: Help, Home, Finish, Save, << Back, Next >>

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

SPC2009 - Project Year 2009

Application: Customer Summary Information | Sample Project Sponsor Name: Sample Project Application
Customer 1 of 1

Customer Company Name: ABC Manufacturing

Customer Fed Tax ID #: 111-22222222

Customer's Tax Status: Corporation | Exempt Reason: []

Customer Contact Name: Mr Kringle

Street Address: 1111 North Pole
Suite b

City: Santa Maria | State: CA | Zip Code: 92141

Phone: (800) 555-1212 | FAX: [] [] []

E-Mail: CKringle@snowmail.info

Customer Corporate Parent Name: n/a

Customer Corporate Parent Fed Tax ID #: n/a

Buttons: Help, Home, Finish, Save, << Back, Next >>

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 screenshot shows the 'Site Summary Information' form. At the top, it says 'Application: Site Summary Information' and 'Sample Project Sponsor Name: Sample Project Application'. Below this, there are several sections of input fields:

- Select the customer site you wish to edit:** A dropdown menu showing '1 - Unnamed'.
- Site Customer Name:** A dropdown menu showing '1 - ABC Manufacturing'.
- Site Name:** A text box containing 'ABC Plant #8C'.
- Site Address:** A text box containing '88 Cee Street'.
- City:** A text box containing 'Los Angeles'.
- State:** A dropdown menu showing 'CA'.
- Zip Code:** A text box containing '92303'.
- Site Contact Name:** A text box containing 'Mr K'.
- Site Phone:** A text box containing '(800) 555-1212'.
- Brief Site Description:** A text box containing 'Manufacturing plant' and a tooltip that says 'Enter a brief description of the site'.
- Building Area (sq ft of Total Facility):** A text box containing '250000'.
- Building Age (in years):** A text box containing '10'.
- Number of Floors:** A text box containing '2'.

At the bottom of the form, there are buttons for 'Help', 'Home', 'Finish', 'Save', '<< Back', and 'Next >>'. An 'Edit Meter Data' button is also present on the right side.

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.

Tooltips that show when mouse is over a changeable item

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

The screenshot shows the 'Site Meter Summary' form. At the top, it says 'Application: Site Meter Summary' and 'Sample Project Sponsor Name: Sample Project Application'. Below this, there are two main tables:

Site Energy Use

Energy Supplier	Electric Usage (kWh/year)	Electric Peak (kW)	Gas Usage (Therms/year)
SCE	350000000	1200	0

Meter Details

Meter ID #	Energy Distribution Company	Rate Schedule	Energy Supplier Meter Number	Account Number
1	SCE	TOU-8	12345-5	123442233
2	SCE			
3	SCE			
4	SCE			

At the bottom of the form, there are buttons for 'Help', 'Home', 'Finish', 'Save', '<< Back', and 'Next >>'. A tooltip points to the 'Rate Schedule' field in the second table, which says 'Enter a rate schedule used with meter # 2'.

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.

Tooltips that show when mouse is over a changeable item

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

SPC2009 - Project Year 2009
Measure Summary Information
 Measure 1 of 1

Application: Sample Project Sponsor Name
 Sample Project Application

Select the measure you wish to edit: 1 - Unnamed

Measure Name: Chiller Retrofit

Customer Site for this Measure: 1 - ABC Plant #8C

Meter ID: 1 - 12345-5

Category: (@ \$0.15 kWh/yr) AC&R I

Calculation Method: Estimation Software (SPC)

Retrofit or New Install: Retrofit (Same Load / Production)

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

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

Life of Measure in Years: 19

Future Salvage Value (proposed equipment): \$15,000.00

Salvage Value (existing): \$20,000.00

Enter a brief description of this measure: Salvage values are used with the financial analysis tool, other measure specific descriptions reside here.

Buttons: Help, Home, Finish, Save, << Back, Next >>

Callout Boxes:

- 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 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.
- Enter future and existing salvage values, used with Financial Analysis
- 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 2009 SPC Procedures Manual for details.

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.