

# **Comprehensive Residential Information System (CRIS)**

## **EmPower NY User's Guide**

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## 1.0 Accessing the EmPower Application within CRIS

The Comprehensive Residential Information System (CRIS) is accessible from any Internet connected PC supporting Internet Explorer version 5.0 or higher. CRIS does not support Netscape browsers.

In your web browser, type the address: <https://cris.nyserda.org/pops>. This address is a VeriSign Secure Site and provides a high level of security by encrypting all data transmitted over the Internet, preventing unauthorized third parties from looking at any of your data.

### 1.1 Logging onto the system

To gain access to the Comprehensive Residential Information System (CRIS), the login screen will appear and prompt the user for his/her user ID and password as shown in the screen below.



The screenshot shows the login interface for the NYSEDA BUILDINGS PORTAL. At the top left, the NYSEDA logo and the text "BUILDINGS PORTAL" are visible. Below this is a blue header bar with the text "System Login". The main area contains a login form with the following fields and controls:

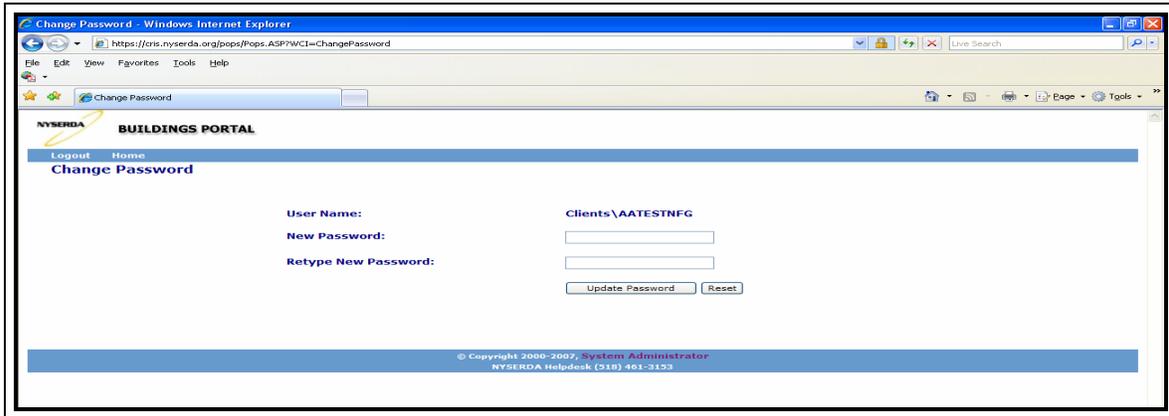
- Login ID:
- Password:
- Domain:
- Change Password:
- Buttons:

At the bottom of the page, there is a blue footer bar containing the text: © Copyright 2000-2007, System Administrator  
NYSEDA Helpdesk (518) 461-3153

You may change your password at any time by clicking on the “Change Password” check box at the bottom of the login screen.

## 1.2 *Changing Passwords*

The Change Password screen appears when you log in for the first time, and whenever you select the “Change Password” button. Assign a permanent password and click the Update Password button.



The screenshot shows a web browser window titled "Change Password - Windows Internet Explorer". The address bar contains the URL "https://cris.nyseda.org/pops/Pops.ASP?WCI=ChangePassword". The browser's menu bar includes "File", "Edit", "View", "Favorites", "Tools", and "Help". The page content features the NYSERDA logo and the text "BUILDINGS PORTAL". A navigation bar contains "Logout" and "Home" links. The main heading is "Change Password". The form includes the following fields and buttons:

- User Name:** Clients\AATESTNFG
- New Password:** [Text input field]
- Retype New Password:** [Text input field]
- Update Password** button
- Reset** button

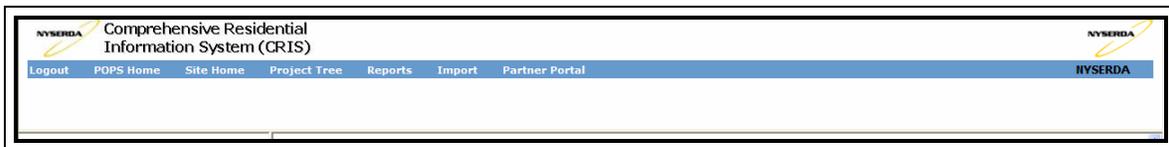
At the bottom of the page, a footer contains the text: "© Copyright 2000-2007, System Administrator NYSERDA Helpdesk (518) 461-3153".

## 2.0 Standard CRIS Navigation

### 2.1 *Toolbar Navigation*

The navigation bar is the blue bar located at the top of the screen within the CRIS application. The navigation bar provides you with links to navigate through the available screens in the system.

*Figure 2.1:* CRIS toolbar



- **Logout** link will log you out and display the “Login” screen;
- **POPS Home** link will back you out to the “System Gateway” screen;
- **Site Home** link will back you out to the “Application Selection” screen;
- **Project Tree** link will return you to the main EmPower Projects by Contractor screen
- **Reports** link will move you to the “Reports” screen;

## 2.2 Data Navigation Folders

The data navigation folders appear on the left side of the screen. This portion of the screen provides a way to locate and view information in your database.

These folders have been designed to work in a similar fashion to Windows Explorer. Open a folder by clicking on the folder name. When you do so, you will see information about that folder appear in a data entry form on right side of the screen, and you will see any subfolders appear below the folder that you opened. If you click on an open folder, the subfolders will temporarily disappear.

EmPower NY projects are listed by customer name and will appear under one of four project status folders:

1. Audits In Process
2. Jobs In Process
3. Jobs Completed
4. Jobs Cancelled

Note that the project status folders only appear on the left if the contractor has a project with that particular project status. For example, Apex Plumbing & Heating below has two projects where the contractor is performing the initial audit, “Audits in Process” status (John Smyth 551 & 556), and one project where the measures installation is taking place, “Jobs In Process” status (John Smyth 556). EmPower supports tracking multiple low income programs within this application. To quickly identify what program a project belongs to, the Program Type is appended to the beginning of the project customer name. Multi-family projects are identified with an MF followed by the Program Type and Service Address.

**Figure 2.2:** Navigation Folders or “Tree”

The screenshot shows the NYSERDA Comprehensive Residential Information System (CRIS) interface. On the left, there is a navigation tree under 'Empower NY Projects'. The tree includes folders for 'Audits In Process', 'Jobs In Process', and 'Jobs Completed'. Under 'Jobs Completed', there is a sub-entry for 'MF-SBC: 222 MAIN STREET'. A yellow callout bubble points to this entry with the text: 'Projects with 5 or more units in the field “No. of Apartments Receiving Service” are identified as multi-family projects and will be given an “MF-“ prefix.

On the right side of the interface, there is a table titled 'Jobs Completed' and a 'Project Status Summary' table. The 'Project Status Summary' table is as follows:

Contractor	Number Of Projects	Number Of Units	Total Project Cost	Total Energy Savings (\$)	Total Energy Savings (kWh)	Total Energy Savings (MMBTU)
Apex Plumbing & Heating	1	5	\$306	\$302.00	300.00	
<b>TOTAL:</b>	<b>1</b>	<b>5</b>	<b>\$306</b>	<b>\$302.00</b>	<b>300.00</b>	

Another yellow callout bubble points to the navigation tree with the text: 'Navigation folders or “Navigation Trees” similar to Microsoft Windows Explorer

## 2.3 Reporting and Analysis

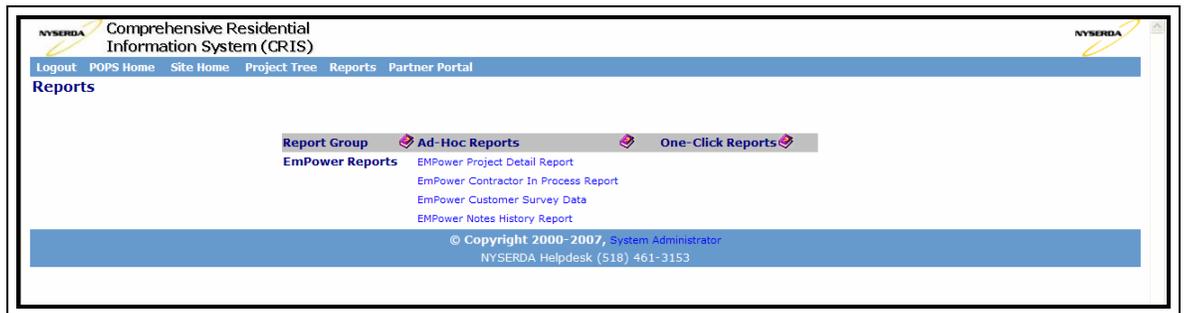
CRIS provides a flexible reporting engine in order to help you transform your data into a variety of useful formats.

To access the reporting engine, click on the "Reports" link on the system navigation bar.

### Report Selection Screen

The report selection screen shows the reports that you can create, based on your access rights and the type of database that you are currently using. Because of this, the list of reports may look different from time to time.

**Figure 2.3:** Report Selection Screen



The report list contains three columns. The first column lists a report category. The second column lists the available ad-hoc reports, and the third column lists the available "One-Click" reports.

- "One-Click" reports are the easiest to produce. You click on the report name, and then you see the contents of the report. However, you first must create "One-Click" reports by selecting the "One-Click" field on the Report Criteria screen. Once you've created a One-Click report, it will appear in the third column of the Reports screen.
- "Ad-Hoc" reports provide you with more flexibility, but are more complicated to use. When you click on an ad-hoc report, you will be taken to the Report Criteria screen, where you will be able to specify options about how the report is formatted, and specify what data to include in the report.

## Report Criteria Screen

The Report Criteria Screen appears when you click on an Ad-Hoc report. This screen allows you to control the format of the report, and the contents of the report. When you have chosen the appropriate options, click on the Run button at the bottom of the form to produce the report.

**Figure 2.4:** Report Criteria Screen

The screenshot shows the 'Report Criteria: EMPower Project Detail Report' screen. At the top, there is a navigation bar with 'Logout', 'POPS Home', 'Site Home', 'Project Tree', and 'Reports'. Below this is a title bar with 'Comprehensive Residential Information System (CRIS)' and the NYSEIDA logo. The main content area is divided into several sections:

- Criteria:** Includes a 'Criteria\*' field with a dropdown menu set to 'None', a 'Save As' field, and checkboxes for 'All Users', 'All Reports', and 'One-Click'. There is also a 'Delete' button.
- General Format:** Includes an 'Output Format\*' dropdown menu set to 'HTML (Custom Template)'.
- When?:** Includes checkboxes for 'Report Title', 'Project Start Date Range', 'Project End Date Range', and 'Job Scope Approval Date'.
- Where?:** Includes a checkbox for 'Service Address'.
- What?:** Includes checkboxes for 'Program Type', 'Utility', 'Empower Account #', 'Work Order #', 'Customer Last Name', 'Project Status', 'Job Type', 'Referral Source', 'WAP Coordinated', and 'Leveraged Funding'.

At the bottom of the form, there are 'Save Criteria' and 'Run Report' buttons. The browser's status bar at the very bottom shows 'Done' and 'Internet'.

Each report can have a different set of available options. However, there are some options that appear on most of the reports available through CRIS. They are as follows:

### **Criteria**

When you run a report, the system saves the options that you used to run the report. This saved set of options is called a Criteria Set. You can control what the criteria sets are called and when they will be available.

Data entry fields on the criteria option include:

- *Open* - To use a criteria set that had been previously saved, select that criteria set from this list.
- *Save As* – If you leave this blank, the criteria set will be saved with the name “Last Criteria”. To save the options using a different name, specify that name here.
- *All Users* – Click on this button if you want this criteria set to be visible to everyone, rather than just yourself.
- *All Reports* – Click on this button if you want this criteria set to appear for each of the reports for this database.
- *One-Click* – Click on this button if you want this criteria set to be published as a “One-Click” report on the Report Selection page.
- *Delete* – Click on this button to delete the criteria set.

### **Output Format**

The output format option allows you to specify the type of output for some reports. For example, the EmPower Project Detail report has two output formats, Excel and HTML.

### **Report Title**

This option lets you modify the report title that appears on your report.

### **Maximum Rows**

In an attempt to prevent users from accidentally running extremely long-running reports, there is a “maximum number of rows” field specified for each report. If you run a report and there is more data than is shown, you will see a red error message that tells you that the data is incomplete. You can always increase the maximum rows value and run the report again.

### 3.0 Contractor and Project Status Tracking

#### 3.1 Contractor Metrics

Contractor metrics are displayed by clicking on the folder with a contractor’s name, as shown below in our test case of “Apex Plumbing & Heating”. The following grids are presented on this screen:

- An “Outstanding Referrals” grid providing a summary of referrals requiring a response from the contractor. Contractors can either accept or reject a referral. *See section 4.0 to learn more about how to accept/reject referrals.*
- A “Contractor Metrics” grid providing a summary of the contractor’s performance within the EmPower NY program. This grid summarizes the number of referrals by referral status, the number of jobs by job status, and energy and cost savings metrics including:
  - Total Project Cost
  - Total Energy Savings (\$)
  - Total Energy Savings (kWh)
  - Total Energy Savings (MMBTU)

**Figure 3.1:** Contractor Summary Screen

The screenshot displays the NYSEDA Comprehensive Residential Information System (CRIS) interface. At the top, there are navigation links: Logout, POPS Home, Site Home, Project Tree, and Reports. The main content area is divided into a left sidebar and a main panel. The sidebar contains a search bar and a folder tree for 'Empower NY Projects by Status', with 'Apex Plumbing & Heating' selected. The main panel shows the contractor's name and two data tables.

Program		Contractor	
Empower NY Projects by Status		Apex Plumbing & Heating	

Outstanding Referrals							
Action Required	Referral Date	Days Remaining	Customer Name	Service Address	Program Type	County	Job Type
Accept   Reject	01/09/2007	-6	BECKETT, DYLAN	222 MAIN STREET	SBC	TIOGA	Electric Reduction

Contractor Metrics										
Referrals Accepted	Referrals Rejected/Expired	Referrals Pending	Audits In Process	Jobs In Process	Jobs Completed	Jobs Cancelled	Total Project Cost	Total Energy Savings (\$)	Total Energy Savings (kWh)	Total Energy Savings (MMBTU)
4	1		2	1	1		\$483	\$584.25	300.00	1,996.00

Please note that these metrics include only those where the contractor is the primary ESCO.

### 3.2 Project Status Metrics

Project Status Summary metrics are also provided for projects at their various stages, such as for all “Jobs In Process” projects as illustrated below. EmPower NY projects can be in one of the following status categories:

- Audits In Process
- Jobs In Process
- Jobs Completed
- Jobs Cancelled

**Figure 3.2:** Project Status Summary Screen: Jobs in Process

The screenshot displays the NYSDERDA Comprehensive Residential Information System (CRIS) interface. The top navigation bar includes 'Logout', 'POPS Home', 'Site Home', 'Project Tree', and 'Reports'. The left sidebar shows a tree view of 'Empower NY Projects by Status' with sub-items: 'Apex Plumbing & Heating', 'Audits In Process', 'SBC: Smyth 551, John', 'GEP: Smyth 556, John', 'Jobs In Process' (highlighted), and 'Jobs Completed'. The main content area features a table with columns 'Program', 'Contractor', and 'Status', showing 'Empower NY Projects by Status', 'Apex Plumbing & Heating', and 'Jobs In Process'. Below this is a section titled 'Jobs In Process' containing a 'Project Status Summary' table.

Program	Contractor	Status
Empower NY Projects by Status	Apex Plumbing & Heating	Jobs In Process

Project Status Summary						
Contractor	Number Of Projects	Number Of Units	Total Project Cost	Total Energy Savings (\$)	Total Energy Savings (kWh)	Total Energy Savings (MMBTU)
Apex Plumbing & Heating	1	1	\$177	\$282.25	0.00	1,996.00
<b>TOTAL:</b>	<b>1</b>	<b>1</b>	<b>\$177</b>	<b>\$282.25</b>	<b>0.00</b>	<b>1,996.00</b>

## 4.0 Accepting / Rejecting a Referral

Once a referral has been assigned to a contractor, the contractor:

1. Is notified via email that an EmPower NY Program referral has been assigned to him/her within the CRIS system. This email will provide the URL or website address. Note that for security reasons, a logon ID and password will have already been established and communicated to each contractor.
2. Logs into CRIS via their internet browser by clicking on the link provided within the email.
3. Views the referral under the “Outstanding Referrals” grid once clicking on the Contractor folder. See Figure 4.1 below.
4. Accepts/rejects referral by clicking on the appropriate button within the “Outstanding Referrals” grid.

Accepted referrals will appear as projects below the “Audits In Process” folder. Users can view detailed project information by clicking on the appropriate project below this folder. Rejected referrals are removed from the contractor’s view.

This grid provides summary information regarding the referral, the number of days remaining to make the accept/reject decision (turnaround time for this decision is 10 days), the program type, the job type and the ability to accept or reject the referral within the CRIS system.

**Figure 4.1:** “Outstanding Referrals” grid

The screenshot displays the NYSERDA Comprehensive Residential Information System (CRIS) interface. The main content area shows the 'Outstanding Referrals' grid for the contractor 'Apex Plumbing & Heating'. The grid contains one row of data with 'Accept' and 'Reject' buttons for each referral. Below the grid is the 'Contractor Metrics' table, which provides a summary of the contractor's performance across various categories.

Action Required		Referral Date	Days Remaining	Customer Name	Service Address	Program Type	County	Job Type
Accept	Reject	01/09/2007	-6	BECKETT, DYLAN	222 MAIN STREET	SBC	TIOGA	Electric Reduction

Referrals Accepted	Referrals Rejected/Expired	Referrals Pending	Audits In Process	Jobs In Process	Jobs Completed	Jobs Cancelled	Total Project Cost	Total Energy Savings (\$)	Total Energy Savings (kWh)	Total Energy Savings (MMBTU)
4	1		2	1	1		\$483	\$584.25	300.00	1,996.00

Please note that these metrics include only those where the contractor is the primary ESCO.

## 5.0 Viewing Project Information

Once a referral is accepted, users can view detailed project information. Project information has been divided into three categories:

- Project / Customer Info
- Questionnaire Data
- Project Measures

Follow the directions below to navigate to a specific job or project. Keep in mind, some information is generated by the system and cannot be changed by the user. Note that if a contractor user does not have projects within a particular status (e.g., has not completed any EmPower NY project), and then that particular project status folder will not appear within the left navigation folders. (e.g., the “Jobs Canceled” folder does not appear).

**Figure 5.1:** Finding a Project within the Navigation Folders

The screenshot shows the NYSERDA web application interface. On the left is a navigation tree with folders for 'Empower NY Projects by Status', 'Apex Plumbing & Heating', 'Audits In Process', 'Jobs In Process', 'GEP: Smyth 556, John', and 'Jobs Completed'. The 'GEP: Smyth 556, John' folder is selected. The main content area is titled 'Project/Customer Info' and contains various data fields. Two yellow callout boxes provide instructions: 'Step 1: First click the appropriate project status folder such as “Jobs In Process”.' and 'Step 2: Then select the appropriate customer folder name such as “John Smyth 556”'.

Field	Value
Program Type	GEP
Customer First Name	John
Customer Last Name	Smyth 556
Empower Account #	D006846886
Work Order #	D008031496
Customer Notification Letter Sent	<input type="checkbox"/>
Enrollment Date	12/09/2005
Packet Sent Date	12/14/2005
Project Start Date	03/01/2006
Job Scope Approval Date	
Project End Date	
Project Status	Jobs In Process
Job Type	Home Performance
Referral Source	HSD
Utility	Con-Ed
Pre-Usage: Electric (KWh/yr)	12091
Pre-Usage: NGas (Therms/yr)	1393
Own/Rent	RENT
Main Heating Fuel	Natural Gas
Secondary Heat is Electric	<input type="checkbox"/>
<b>Building Information:</b>	
Type of Building	House
Age Of Home	50
Total Number Of Apartments	0
Square Footage	2200
No. of Apartments Receiving Service	1
Number Of People	2
<b>Mailing Address:</b>	
Address 1	153 Main Street
Address 2	
City	
State	NY
Zip Code	
Phone	(103)123-6140
Alternate Phone	
<b>Service Address:</b>	
Address 1	2599 Fourth Street
Address 2	
City	OWEGO
State	NY
County	TIOGA
Zip Code	13827
<b>Landlord Information:</b>	
Name	Joe Owner

## 5.1 Project / Customer Information Screen

The “Project / Customer Information” screen displays customer, building, and landlord (if applicable) information as well as general project information such as milestone dates and project status. The 3 character acronym for the program type associated with this project is displayed as “SBC” for Systems Benefits Charge Program, “GEP” for Gas Efficiency program or “AFC” for All Fuels Component.

**Figure 5.2:** Project / Customer Info screen

The screenshot shows a web-based form titled "Project/Customer Info" with several tabs: "Questionnaire Data" and "Project Measures". The form is divided into several sections:

- Program and Customer Information:** Includes fields for Program Type (GEP), Customer First Name (John), Customer Last Name (Smyth 556), Empower Account # (D006846886), Work Order # (D008031496), Enrollment Date (12/09/2005), Packet Sent Date (12/14/2005), Project Start Date (03/01/2006), Job Scope Approval Date, and Project End Date.
- Project Status and Details:** Includes Project Status (Jobs In Process), Job Type (Home Performance), Referral Source (HSO), Utility (Con-Ed), Pre-Usage: Electric (KWh/yr) (12091), Pre-Usage: NGas (Therms/yr) (1393), Own/Rent (RENT), Main Heating Fuel (Natural Gas), and Secondary Heat is Electric (checkbox).
- Building Information:** Includes Type of Building (House), Age Of Home (50), Total Number Of Apartments (0), Square Footage (2200), and No. of Apartments Receiving Service (1).
- Mailing Address:** Includes Address 1 (153 Main Street), Address 2, City, State (NY), and Zip Code.
- Service Address:** Includes Address 1 (2599 Fourth Street), Address 2, City (OWEGO), State (NY), County (TIOGA), and Zip Code (13827).
- Landlord Information:** Includes Name (Joe Owner), Address 1 (455 New Street), Address 2, City (ANSONIA), Zip Code (06401), and Phone Number ((203)434-5224).
- Notes:** A text area containing a note from 12/29/2006: "On 12/29/2006, Clients\apexph@aol.com wrote: Testing this project as a contractor...".

Callouts provide additional context:

- A yellow callout at the top right says: "Click on the 'Project Measures' tab to view the measures approved and/or installed and their related cost & savings metrics for a particular job."
- A yellow callout on the left says: "Projects are identified as multi-family if the No. of Apts or Units Receiving Service is greater than 4".
- A yellow callout at the bottom left says: "A note history is maintain for all projects. The last note added is displayed on this screen. Click 'Add Note' to add another note. Click 'View Note History' to view all the notes for this project".

## 5.2 Questionnaire Data Screen

The “Questionnaire Data” screen displays responses to the customer survey questionnaire on home heating and appliance inventory.

**Figure 5.3:** Questionnaire Data screen

Program	Contractor	Status	Project
Empower NY Projects by Status	Apex Plumbing & Heating	Jobs In Process	GEP: Smyth 556, John

Project/Customer Info	Questionnaire Data
Program Type: <b>Gas Efficiency Program</b>	
<b>Home Heating: (checkmark equals "Yes")</b>	
Heating System Type	Furnace/Hot Air
Electric Space Heaters?	<input type="checkbox"/>
Kerosene Heaters?	<input type="checkbox"/>
Access to Attic?	<input checked="" type="checkbox"/>
Attic Insulation	
<b>Comfort Issues:</b>	
Rooms Hot?	<input type="checkbox"/>
Rooms Cold?	<input type="checkbox"/>
<b>Water Heater:</b>	
Fuel Type	
If electric, push reset button often?	<input type="checkbox"/>
Location	
<b>Appliances:</b>	
Own Refrigerator?	<input checked="" type="checkbox"/>
If yes, how old?	2
Second Refrigerator?	<input type="checkbox"/>
If yes, how old?	0
Separate Freezer?	<input checked="" type="checkbox"/>
If yes, how old?	27
Waterbed w/ Heating Element?	<input type="checkbox"/>
Electric Dryer?	<input checked="" type="checkbox"/>
If yes, how many loads per week?	6
Sump Pump?	<input type="checkbox"/>
Heat Tape?	<input type="checkbox"/>
Access to Crawl Space?	<input type="checkbox"/>
Wall Insulation Level	
Insulated in WAP?	<input type="checkbox"/>
Program Date Insulated	01/01/1900
Moisture Problem?	<input type="checkbox"/>
No Problems?	<input type="checkbox"/>
Leaks?	<input type="checkbox"/>
Wrapped with Additional Insulation?	<input type="checkbox"/>
Window/Wall AC?	<input checked="" type="checkbox"/>
Central AC?	<input type="checkbox"/>
Dehumidifier?	<input checked="" type="checkbox"/>
Pool Heater?	<input type="checkbox"/>
Pool Filter?	<input type="checkbox"/>
Fish Tank?	<input checked="" type="checkbox"/>
Roof Tape?	<input type="checkbox"/>
Well Pump?	<input type="checkbox"/>
Computer	<input checked="" type="checkbox"/>
Torchieres?	<input type="checkbox"/>
Project Notes	USE NEBULIZER, C-PAP MACHINE, HEATING FOUNTAIN FOR HEALTH REASON. ELECTRIC

Last Updated On	Last Updated By
Dec 29 2006 9:30AM	TRC_Windsor\DBeckett

### 5.3 *Project Measures Screen*

The “Project Measures” screen displays energy and cost-related metrics for approved and/or installed measures as well as any notes or comments from the EmPower NY Program administrators.

The list of measures on this screen slightly differs according to the job type.

- *Electric Reduction* job types include the list of measures shown below in Figure 5.4 minus the four additional measures for *Home Performance or Combined* jobs.
- *Home Performance or Combined* job types will display the list of measures in Figure 5.4 with the additional four measures:
  1. Heating Repair
  2. Heating Replacement
  3. Insulation
  4. Air Sealing

Note that EmPower NY Program administrators can assign additional vendors to a portion of the work for any given job. This work that is handled by another vendor will be denoted as such under the “Vendor” column of this grid. EmPower is able to capture the funding source associated with each measure to support tracking and reporting by various funding sources. Default funding source values are assigned to measures according to the program type of the project and are subsequently modifiable by administrators.

Also note that Contractor and Project metrics (described in Section 3.0 above) take into account only those measures that have been installed.

Figure 5.4: Project Measures screen

NYSERDA Comprehensive Residential Information System (CRIS)

Program: Empower NY Projects by Status | Contractor: Apex Plumbing & Heating | Status: Jobs In Process | Project: GEP: Smyth 556, John

Project Measures

Agency Program

Leveraged Funding (\$):  | Landlord Authorization:  | WAP Coordinated:

Status	Measure	Funding Source	Vendor	Approved Quantity	Installed Quantity	Energy Savings (kWh/yr)	Energy Savings (MMBTU/yr)	Cost Savings (\$/yr)	Install Cost	Last Updated Date
Locked	Audit Fee/Education	GEP	Apex Plumbing & Heating	1	1	0	44	\$ 10.00	\$ 17.00	
Locked	CFL	SBC	Apex Plumbing & Heating	1	1	0	362	\$ 70.25	\$ 40.90	
Unlocked	Refrigerator Replacement	SBC	Cattaraugus County Co	1	1	0	790	\$ 100.00	\$ 59.95	Dec 29 2006 9:29AM
Unlocked	Freezer Replacement	SBC	Apex Plumbing & Heating	1	1	0	800	\$ 102.00	\$ 60.00	Dec 29 2006 9:29AM
Unlocked	Hardwired Lighting	SBC	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Domestic Hot Water Improvement	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Shower Heads	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Tank Wrapping	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Pipe Wrapping	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Clothes Dryer Replacement	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Waterbed Related Measures	SBC	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Other	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Heating Repair	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Heating Replacement	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Insulation	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
Unlocked	Air Sealing	GEP	Apex Plumbing & Heating			0		\$ 0.00	\$ 0.00	
<b>Cattaraugus County Community Action Total</b>				<b>1</b>	<b>1</b>	<b>0</b>	<b>790</b>	<b>\$100.00</b>	<b>\$59.95</b>	
<b>Apex Plumbing &amp; Heating Total</b>				<b>3</b>	<b>3</b>	<b>0</b>	<b>1,206</b>	<b>\$182.25</b>	<b>\$117.90</b>	
<b>Unassigned Vendor Total</b>										
<b>SBC Total</b>				<b>3</b>	<b>3</b>	<b>0</b>	<b>1,952</b>	<b>\$272.25</b>	<b>\$160.85</b>	
<b>GEP Total</b>				<b>1</b>	<b>1</b>	<b>0</b>	<b>44</b>	<b>\$10.00</b>	<b>\$17.00</b>	
<b>TOTAL</b>				<b>4</b>	<b>4</b>	<b>0</b>	<b>1,996</b>	<b>\$282.25</b>	<b>\$177.85</b>	

Notes: On 01/25/2007, Clients\apexph@aol.com wrote: Contractor added one mote notes...

Add Note | View Note History | View Project Detail Report

Last Updated On: Dec 29 2006 9:30AM | Last Updated By: TRC\_Windsor\DBeckett

Submit | Reset

© Copyright 2000-2007, System Administrator  
NYSERDA Helpdesk: (518) 461-3153

Once a measure has been locked by an administrator, it is no longer editable by contractors

Vendor and Funding Source Totals

## 6.0 Reporting

The system features three reports for contractor users. They are: Project Detail Report, Contractor In Process Report and Customer Survey Data Report.

Users can run the reports by navigating to the Reports screen:

- Clicking on the “Reports” link on the navigation toolbar.
- Selecting a report link on this screen.

*Figure 6.1: Navigating to the Reports Module*



## **6.1 EmPower Project Detail Report**

The EmPower Project Detail report provides all the detailed information for a project or group of projects including:

- Project information
- Customer / Building information
- Questionnaire data
- Project Measures information

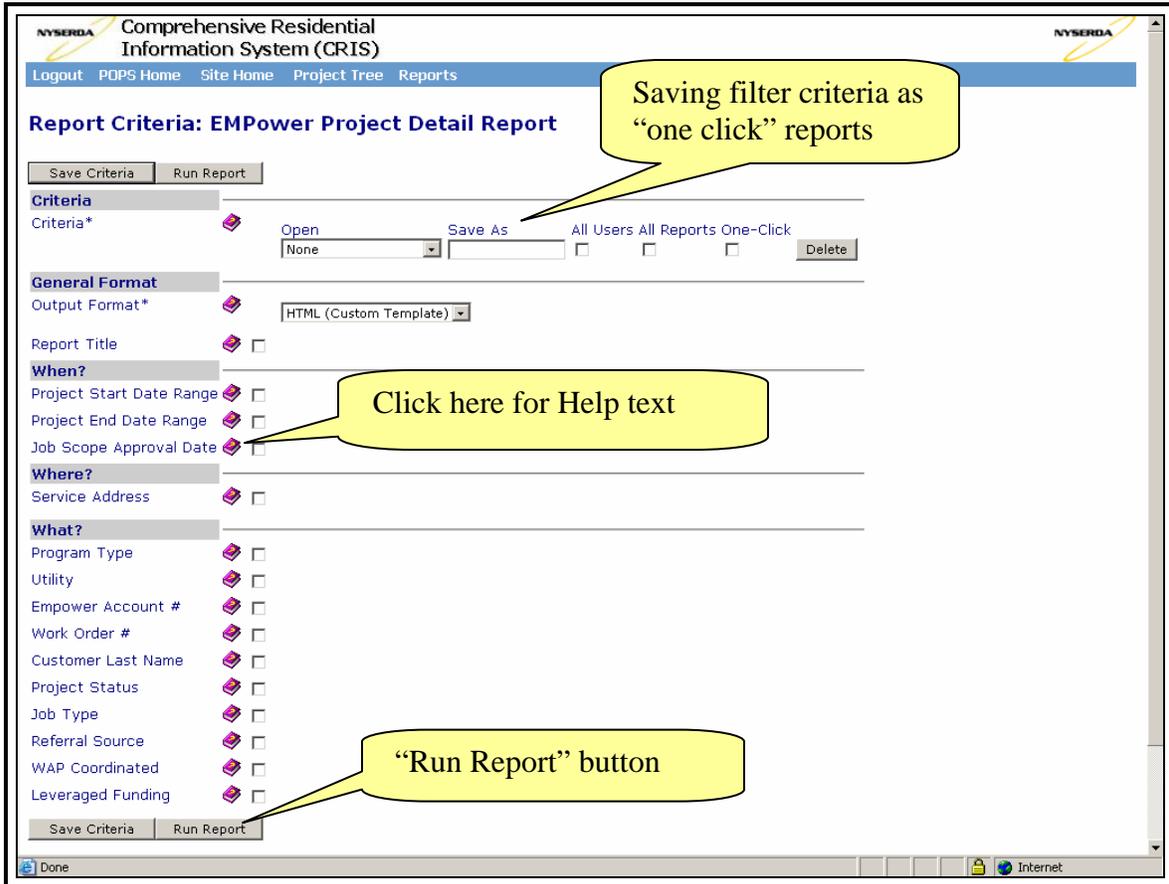
This report is generated in a custom HTML printable format and an EXCEL format. Users can search for a particular customer name or any other text within this document by clicking on the Edit -> Find buttons on the internet browser or clicking the “Ctrl and “F” key simultaneously on the keyboard.

The reporting module includes the ability to sort and filter data based on user input. Contractor users can filter the Project Detail Report using the following filters:

- Project Start Date
- Project End Date
- Job Scope Approval Date
- Program Type
- Utility
- EmPower Account #
- Work Order #
- Project Status
- Job Type
- Referral Source
- Customer Last Name
- WAP Coordinated
- Leveraged Funding
- Service Address

Click on the small purple books next to each filter for help related text. *See Section 2.3 to learn more about how to filter and generate reports.*

*Figure 6.2: EmPower Project Detail Report – Criteria Screen*



Below is an example of the EmPower Project Detail Report for one customer.

*Figure 6.3: EmPower Project Detail Report – HTML Output*

**CRIS - EPower Project Detail Report**

**Project Information**

Program Type	GEP		
Contractor Name	Apex Plumbing & Heating	Customer Name	Smyth 556, John
Project Status	Jobs In Process	Customer Notification Letter Sent	
Empower Account #	D006846886	Work Order #	D008031496
Enrollment Date	12/09/2005	Packet Sent Date	12/14/2005
Project Start Date	03/01/2006	Project End Date	
Job Scope Approval Date		Own/Rent	RENT
Main Heating Fuel	Natural Gas	Secondary Heat is Electric	
Job Type	Home Performance	Referral Source	HSO
Utility	Con-Ed		
Pre-Usage Electric (kWh/yr)	12,091	Pre-Usage NGas (Therms/yr)	1,393
Type of Building	House	Total # of Apartments	0
Age of Home	50	# of Apartments Receiving Service	1
Square Footage	2200		
Latest Note	Testing this project as a contractor...		

**Customer/Building Information**

Customer Name	Smyth 556, John	Email	customer@email.com
Mailing Address 1	153 Main Street	Mailing Address 2	
Mailing City, State	, NY	Mailing Zip Code	
Phone	(103)123-8140	Alternate Phone	
Fax		Mobile	
Service Address 1	2599 Fourth Street	Service Address 2	
Service City, State	OWEGO, NY	Service County	TIOGA
Service Zip Code	13827		
Landlord Name	Owner, Joe	Landlord Phone	(203)434-5224
Landlord Address 1	455 New Street	Landlord Address 2	
Landlord City, State	ANSONIA, NY	Landlord Zip	06401

**Questionnaire Data**

<b>HOME HEATING</b>			
Heating System Type	Furnace/Hot Air		
Electric Space Heaters?	NO	Access to Crawl Space?	NO
Kerosene Heaters?	NO	Wall Insulation Level	
Attic?	YES	Insulated In WAP?	NO
Attic Insulation		Program Date Insulated	01/01/1900
<b>COMFORT ISSUES</b>			
Rooms Hot?	NO	Moisture Problem?	NO
Rooms Cold?	NO	No Problems?	NO
<b>WATER HEATER</b>			
Water Heater Fuel Type		Leaks?	NO
If electric, push reset button often?	NO	Wrapped with Additional Insulation?	NO
<b>Location</b>			
<b>APPLIANCES</b>			
Own Refrigerator?	YES	Window/Wall AC?	YES
If yes, how old?	2	Central AC?	NO
Second Refrigerator?	NO	Dehumidifier?	YES
If yes, how old?	0	Pool Heater?	NO
Seperate Freezer?	YES	Pool Filter?	NO
If yes, how old?	27	Fish Tank?	YES
Waterbed w/ Heating Element?	NO	Roof Tape?	NO
Electric Dryer?	YES	Well Pump?	NO
If yes, how many loads per week?	6	Computer?	YES
Sump Pump?	NO	Torchieres?	NO
Heat Tape?	NO		
Project Notes	I USE NEBULIZER, C-PAP MACHINE, HEATNG PAD, WATER FOUNTAIN FOR HEALTH REASON. ELECTRIC STOVE & OVEN		

**Project Measures**

Leveraged Funding	\$0.00	Landlord Authorization	Yes	WAP Coordinated	Yes				
<b>Measure</b>	<b>Funding Source</b>	<b>Vendor</b>	<b>Locked</b>	<b>Approved Quantity</b>	<b>Installed Quantity</b>	<b>Energy Savings (kWh/yr)</b>	<b>Energy Savings (MMBTU/yr)</b>	<b>Cost Savings (\$/yr)</b>	<b>Install Cost</b>
Audit Fee/Education	GEP	Apex Plumbing & Heating	Yes	1	1	0	44	\$10.00	\$17.00
CFL	SBC	Apex Plumbing & Heating	Yes	1	1	0	362	\$70.25	\$40.90
Refrigerator Replacement	SBC	Cattaraugus County Community Action	No	1	1	0	790	\$100.00	\$59.95
Freezer Replacement	SBC	Apex Plumbing & Heating	No	1	1	0	800	\$102.00	\$60.00
<b>Apex Plumbing &amp; Heating Total</b>				3	3	0	1,206	\$182.25	\$117.90
<b>Cattaraugus County Community Action Total</b>				1	1	0	790	\$100.00	\$59.95
<b>SBC Total</b>				3	3	0	1,952	\$272.25	\$160.85
<b>GEP Total</b>				1	1	0	44	\$10.00	\$17.00
<b>TOTAL</b>				4	4	0	1,996	\$282.25	\$177.85

## 6.2 EmPower Contractor In Process Report

The EmPower Contractor In Process report provides an inventory of all projects in process for a contractor.

This report is generated in HTML printable format and an EXCEL format. Users can search for a particular customer name or any other text within this document by clicking on the Edit -> Find buttons on the internet browser or clicking the “Ctrl and “F” key simultaneously on the keyboard.

The reporting module includes the ability to sort and filter data based on user input. Contractor users can filter the Contractor In Process Report using the following filters:

- Program Type
- Project Status
- Utility
- Contractor

Click on the small purple books next to each filter for help related text. *See Section 2.3 to learn more about how to filter and generate reports.*

**Figure 6.4: EmPower Contractor In Process Report – Criteria Screen**

The screenshot displays the 'Report Criteria: EmPower Contractor In Process Report' interface. At the top, there is a navigation bar with 'Logout', 'POPS Home', 'Site Home', 'Project Tree', and 'Reports'. Below this, the title 'Report Criteria: EmPower Contractor In Process Report' is shown. The interface includes two 'Save Criteria' and 'Run Report' buttons. Under the 'Criteria' section, there are options for 'Open', 'Save As', 'All Users', 'All Reports', and 'One-Click', along with a 'Delete' button. The 'General Format' section shows 'Output Format\*' set to 'Web Page (HTML)'. Below this, there are checkboxes for 'Report Title', 'Maximum records', 'Fields', and 'Sort'. The 'What?' section lists filters for 'Program Type', 'Contractor', 'Utility', and 'Project Status', each with a checkbox and a small purple book icon for help. At the bottom, there are two more 'Save Criteria' and 'Run Report' buttons.

### 6.3 EmPower Customer Survey Data Report

The EmPower Customer Survey Data report provides responses to the customer survey questionnaire on home heating and appliance inventory. It also provides energy usage data in tabular and graphical format.

This report is generated in custom HTML printable format. Users can search for a particular customer name or any other text within this document by clicking on the Edit -> Find buttons on the internet browser or clicking the “Ctrl and “F” key simultaneously on the keyboard.

The reporting module includes the ability to sort and filter data based on user input. Contractor users can filter the Contractor In Process Report using the following filters:

- Project Start Date
- Utility
- Customer Last Name
- Leveraged Funding
- Service Address
- Program Type
- Contractor
- EmPower Account #
- WAP Coordinated

Click on the small purple books next to each filter for help related text. See Section 2.3 to learn more about how to filter and generate reports.

Figure 6.6: EmPower Customer Survey Data Report – Criteria Screen

The screenshot displays the 'Report Criteria: EmPower Customer Survey Data' screen. At the top, there is a navigation bar with links for 'Logout', 'POPS Home', 'Site Home', 'Project Tree', and 'Reports'. The main heading is 'Report Criteria: EmPower Customer Survey Data'. Below this, there are two buttons: 'Save Criteria' and 'Run Report'. The 'Criteria' section features a dropdown menu currently set to 'None', a 'Save As' text field, and three checkboxes labeled 'All Users', 'All Reports', and 'One-Click', followed by a 'Delete' button. The 'General Format' section includes an 'Output Format\*' dropdown menu set to 'HTML (Custom Template)'. The 'When?' section has a 'Project Start Date Range' checkbox. The 'Where?' section has a 'Service Address' checkbox. The 'What?' section lists several filter categories, each with a small purple book icon and a checkbox: 'Program Type', 'Contractor', 'Utility', 'Empower Account #', 'Customer Last Name', 'WAP Coordinated', and 'Leveraged Funding'. At the bottom of the form, there are two buttons: 'Save Criteria' and 'Run Report'.

Figure 6.7: EmPower Customer Survey Data Report – HTML Output

CRIS - EmPower Customer Survey Data Report						
<b>Project/Customer Information</b>						
Customer Name	Smyth 556, John					
Program Type	GEP	Customer Phone	(103)123-8140			
Alternate Phone		Mobile Phone				
Mailing Address1	153 Main Street					
Mailing Address2						
Mailing City, State	, NY	Mailing Zip Code				
Service Address1	2599 Fourth Street					
Service Address2						
Service City, State	OWEGO, NY	Service Zip Code	13827			
Landlord Name	Owner, Joe	Landlord Phone	(203)434-5224			
Landlord Address1	455 New Street		Landlord Address2			
Landlord City, State	ANSONIA, NY	Landlord Zip Code	06401			
Contractor	Apex Plumbing & Heating	EmPower Account #	D006846886			
Job Referral Type	Home Performance	Utility	Con-Ed			
Referral Source	HSO	Emergency/Non-Emergency				
Pre-Usage: Electric (KWh/yr)	12,091.00	Pre-Usage: Gas (Therms/yr)	1,393.00			
Latest Note	Contractor added one mote notes...					
<b>Questionnaire Information</b>						
<b>BUILDING DATA</b>						
Type of Dwelling	House					
Age of Home	50	Total Number of Apartments	0			
Number of People	2	# of Apartments Receiving Service	1			
Main Heating Fuel	Natural Gas	Own/Rent	RENT			
<b>HOME HEATING</b>						
Heating System Type	Furnace/Hot Air					
Electric Space Heaters?	NO	Access to Crawl Space?	NO			
Kerosene Heaters?	NO	Wall Insulation Level				
Attic?	YES	Insulated In WAP?	NO			
Attic Insulation		Program Date Insulated	01/01/1900			
<b>WATER HEATER</b>						
Water Heater Fuel Type		Leaks?	NO			
If electric, push reset button often?	NO	Wrapped with Additional Insulation?	NO			
Location						
<b>APPLIANCES</b>						
Own Refrigerator?	YES	Window/Wall AC?	YES			
If yes, how old?	2	Central AC?	NO			
Second Refrigerator?	NO	Dehumidifier?	YES			
If yes, how old?	0	Pool Heater?	NO			
Seperate Freezer?	YES	Pool Filter?	NO			
If yes, how old?	27	Fish Tank?	YES			
Waterbed w/ Heating Element?	NO	Roof Tape?	NO			
Electric Dryer?	YES	Well Pump?	NO			
If yes, how many loads per week?	6	Computer?	YES			
Sump Pump?	NO	Torchieres?	NO			
Heat Tape?	NO					
Project Notes	I USE NEBULIZER, C-PAP MACHINE, HEATNG PAD, WATER FOUNTAIN FOR HEALTH REASON. ELECTRIC STOVE & OVEN					
<b>Electric Usage History</b>						
Month	Year	kWh	Meter Type	Read Date	Number of Read Days	A/E
<b>Gas Usage History</b>						
Month	Year	kWh	Meter Type	Read Date	Number of Read Days	A/E

## 6.4 EmPower Notes History Report.

The EmPower Notes History report provides a history of all notes related for the particular project.

This report is generated in HTML printable format and an EXCEL format. Users can search for a particular customer name or any other text within this document by clicking on the Edit -> Find buttons on the internet browser or clicking the “Ctrl and “F” key simultaneously on the keyboard.

The reporting module includes the ability to filter data based on user input. Users can filter the Notes History Report using the following filters:

- EmPower account
- Service Address
- Mailing Address
- Customer Last Name
- Work Order #

Click on the small purple books next to each filter for help related text. *See Section 2.3 to learn more about how to filter and generate reports.*

**Figure 6.8: EmPower Notes History Report – Criteria Screen**

The screenshot displays the 'Report Criteria: EMPower Notes History Report' screen. At the top, there is a navigation bar with links for 'Logout', 'POPS Home', 'Site Home', 'Project Tree', and 'Reports'. Below the navigation bar, the title 'Report Criteria: EMPower Notes History Report' is prominently displayed. The screen is organized into several sections, each with a purple book icon for help:

- Criteria\***: Includes a dropdown menu set to 'None', a 'Save As' text input field, and three checkboxes labeled 'All Users', 'All Reports', and 'One-Click'. A 'Delete' button is also present.
- General Format**: Features an 'Output Format\*' dropdown menu currently set to 'Web Page (HTML)'. There is also a 'Maximum records' checkbox which is currently unchecked.
- Where?**: Contains two filter options: 'Service Address' and 'Mailing Address', both with checkboxes that are currently unchecked.
- What?**: Contains three filter options: 'Empower Account #', 'Work Order #', and 'Customer Last Name', all with checkboxes that are currently unchecked.

At the bottom of the screen, there are two buttons: 'Save Criteria' and 'Run Report'.

Below is an example of the EmPower Notes History Report for one EMPower account.

Figure 6.9: EmPower Notes History Report – HTML Output

NYSDORA Comprehensive Residential Information System (CRIS) NYSDORA

Logout POPS Home Site Home Project Tree Reports Criteria Selection

### EMPower Notes History Report

Jan 22, 2007 5:23 PM

Empower Account # Enter full or part of Empower Account # without spaces or dashes.:D006846886;  
Number of rows 2

Empower Account ▲	Project Name ▲	Created By ▲	Created Date ▲	Notes ▲
D006846886	Smyth 556, John	Clients\apexph@aol.com	12/29/2006 9:27:47 AM	Testing this project as a contractor...
D006846886	Smyth 556, John	TRC_Windsor\DBeckett	12/29/2006 9:27:19 AM	Testing with this project for now...