

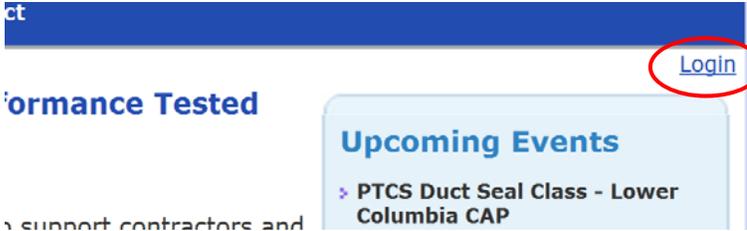
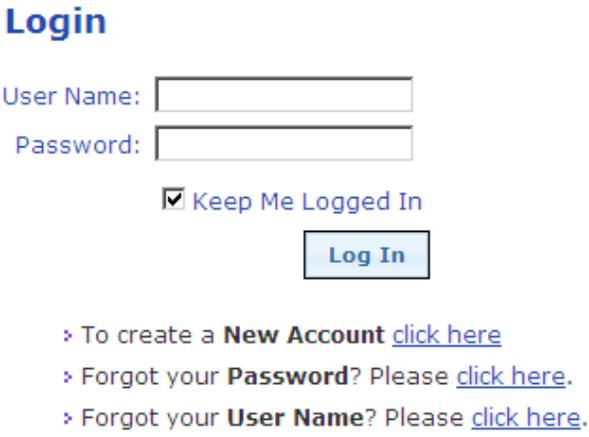
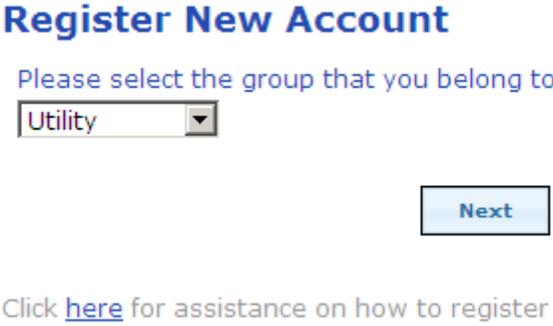
## Utility Measures – Web Navigation Guide

May 2011

This document will cover:

- PTCS Account Creation & Login
- PTCS Utility Reporting
- Viewing PTCS Site / Measure Details

### Account Creation and Login

<p>Create an account or login by clicking on the login text in the upper-right hand corner of the main page</p>	 <p>The screenshot shows the top navigation bar of the PTCS website. The word 'Login' is highlighted with a red circle. Below the navigation bar, there is a section titled 'Performance Tested' and another titled 'Upcoming Events' which lists 'PTCS Duct Seal Class - Lower Columbia CAP'. A partial sentence 'support contractors and' is visible at the bottom of the screenshot.</p>
<p>Enter <b>User Name</b> and <b>Password</b> for existing accounts.</p> <p>Click on the link for a <b>New Account</b> to register for a new account.</p>	 <p>The screenshot shows the 'Login' page. It features two input fields for 'User Name' and 'Password', a 'Keep Me Logged In' checkbox, and a 'Log In' button. Below the login form, there are three links: 'To create a New Account click here', 'Forgot your Password? Please click here.', and 'Forgot your User Name? Please click here.'.</p>
<p>For a new account, select "Utility" in the group dropdown menu.</p>	 <p>The screenshot shows the 'Register New Account' page. It includes a dropdown menu labeled 'Please select the group that you belong to:' with 'Utility' selected. A 'Next' button is located below the dropdown. At the bottom of the page, there is a link: 'Click here for assistance on how to register'.</p>

Create a unique login user name, password (at least 5 characters long) and enter company and contact information.

Click the **Create User** button.

An informational email will be sent to the email entered in the form with a confirmed status.

Access to the site will be granted within 1-2 business days. If account access needs to be activated immediately, please call **800-941-3867**.

## Register New Account

Login / User Name	<input type="text"/>	Company Name	<input type="text"/>
Password	<input type="text"/>	Company Address	<input type="text"/>
Confirm Password	<input type="text"/>	Company City	<input type="text"/>
E-mail	<input type="text"/>	Company State	<input type="text"/>
First Name	<input type="text"/>	Company Zip	<input type="text"/>
Last Name	<input type="text"/>	Company Phone	<input type="text"/>
Phone	<input type="text"/>	Fax	<input type="text"/>
Phone Ext	<input type="text"/>		
Technician ID Number	<input type="text"/>		

\*If you currently have a Technician ID Number, please enter it here.

[Previous](#)

[Create User](#)

## Finding and Viewing Measures (Jobs) Using Simple Search

Once logged in to the site, navigate to the **Utilities** tab on the navigation bar. Select **Measures** in sub-menu that appears.

*Note:* If Utilities doesn't appear in the top navigation bar, you may not be logged in. Successful login shows a "Welcome" message in the right-hand corner.



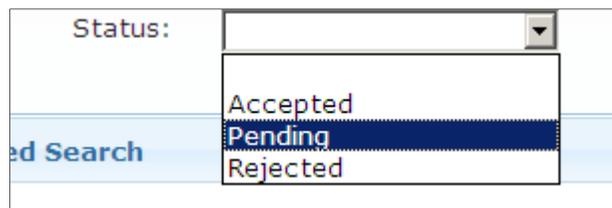
Select the **Start Date** and **End Date** of the time period of the measures being searched.

*Note:* Start and End Dates narrow results to jobs that were completed in the field by the technician within the selected date range.

*Note:* A heat pump and a duct seal measure for the same site may have been sent or entered at different times, so selecting a broad range of dates produces the most effective results.

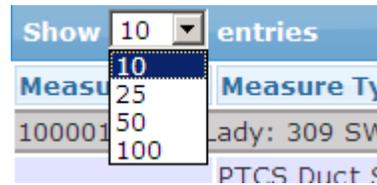
Select the **Status** you wish to view: Accepted, Pending, or Rejected.

*Note:* leaving **Status** blank will produce an all-inclusive result.



Once all of the search criteria are entered, click the **Search** button or press the **Enter** key to retrieve results. The list of resulting measures will appear on the screen below the search area.

The page will default to displaying 10 entries at a time, but it can be adjusted to show 25, 50 or 100 records on each page.



Each grey bar displays a **Customer Name** and **Address**.

Just below each grey bar, each measure for that Customer is listed, along with the **Measure Type**, **Measure Entered date**, the **Status**, and the **Install Date**.

The number in the left-hand column is a hyperlink to click to view the details of each measure.

If the list of results requires multiple pages, clicking on the left and right arrows on the lower right of the list will allow you to navigate through subsequent pages.



\*For simple search Start and End dates are based on the Install Date of the measure

To export all results, navigate to the bottom right of the results list and click the **Export Results** button

The results will default to a Microsoft Excel spreadsheet with the same information as the measure detail screen (shown in next step) for each record.

Showing 1 to 1 of 1 entries

Measure ID	Measure Type	Measure Entered	Status	Install Date
100000	PTCS Duct Seal	2/18/2011	Accepted	02/11/2011

\*For simple search Start and End dates are based on the Install Date of the measure

**Export Results**

When the **Measure ID** in the left-hand column of the search results page is clicked, the detail page for that measure is opened.

In the **Measure Info** page, customer address and specific measure information will be visible.

*Note:* some measures have multiple pages of information. Use the left and right arrows to navigate to other pages, if needed.

The **Find** textbox and button allow for searching of specific text within the detail screen, or exporting the **Measure Info** data to several formats.

Measure Info

1 of 2 of 2

100%

Find | Next

Select a format

- XML file with report data
- CSV (comma delimited)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word

**PTCS Duct Seal #100000**

Karl Hayes  
1069 Cole Way  
Springfield, OR 97478

Owner: Hayes, Karl  
1069 Cole Way  
Springfield, OR 97478  
Phone: 541-744-8895  
Email: Unknown

## Finding and Viewing Measures (Jobs) Using Advanced Search

Once logged in to the site, navigate to the **Utilities** tab on the navigation bar. Select **Measures**.

If Utilities doesn't appear on this tool bar, you may not be logged in.

*Note:* Successful login shows a "Welcome" message in the right-hand corner.



In **Advanced Search**, you can look for jobs by **Install Date**, the date the measure was entered, its **Status**, the **Customer's Address** or **Name**, the **Technician** who did the work, the name of the **Company** claiming the job, the **Measure Type** or the **Utility**.

A combination of any or all of these fields can be used to narrow search results.

*Note:* Leaving any search option blank will produce an all-inclusive result.

For example, leaving **Status** blank will return measures with any status in the results.

**Address** search can be used to search for any portion of an address.

For example:  
*88140 Tiki Ln, Springfield OR*  
can be searched for by typing in **"88140," "Tiki,"** or **"Springfield"**

The same is true for searching by **Customer Name**.

For example:  
*David & Bobbie Dunne*  
can be searched for by typing in **"David," "Bobbie," "David & Bobbie,"** or **"Dunne"**

### Advanced Search

Install Date:

Measure Entry Date:

Status:

Address:

Customer Name:

Tech ID:

Company Name:

Measure Type:

Utility:

- Avista Energy
- Barclon, City of
- Benton County PUD No. 1
- Benton Rural Electric Association
- Big Bend Electric Coop
- Big Horn County Electric Cooperative
- Blackly-Lane Coop
- Blaine, City of
- Bonniers Ferry Electric Department, City of
- Burley Electric Department, City of
- Canby Utility Board

[Save Search](#)  
[Saved Searches](#)

Show  entries

Measure ID	Measure Type	Measure Entered	Status	Install Date
100018 - David & Bobbie Dunne: 88140 Tiki Ln Springfield, OR				
<a href="#">100023</a>	PTCS Heat Pump Air Source	2/23/2011	Accepted	10/19/2010
<a href="#">100024</a>	PTCS Heat Pump Air Source	2/23/2011	Accepted	10/19/2010
<a href="#">100025</a>	PTCS Heat Pump Air Source	2/23/2011	Accepted	02/11/2011

Showing 1 to 3 of 3 entries

\*For simple search Start and End dates are based on the Install Date of the measure

To search for jobs performed by a specific technician or company, choose from the corresponding drop down menu

*Tip:* to jump to a name, click on the Tech ID (or Company Name) dropdown and begin typing the Technician's last name (or Company Name). Use arrow keys to navigate up or down in the list, if needed, and press the tab key to select the highlighted name.

**Advanced Search**

Install Date:

Measure Entry Date:

Status:

Address:

Customer Name:

Tech ID:

Company Name:

Measure Type:

Utility:

- Abrams, Kathleen - 02919
- Aceti, Mario - 05630
- aceti, mario - 07276
- Ackerman, Scott - 01021
- Adams, Brian - 02294
- Adams, Richard - 01848
- Agee, Rodney - 02534
- Ahlin, Michelle - 05571
- Albright, Chad - 02264
- Alder, John A. - 05935
- Alder, John E. - 03137
- Alexander, Steve - 05912
- Alexis, Chris - 01986
- Alford III, Eli - 02961
- Allard, Bernard - 03065

Optional: narrow search results by selecting a Measure Type.

Choices are: Duct Seal, Heat Pump Air Source, Heat Pump Ground Source W-A (Water to Air), and Heat Pump Ground Source W-W (Water to Water).

**Advanced Search**

Install Date:

Measure Entry Date:

Status:

Address:

Customer Name:

Tech ID:

Company Name:

Measure Type:

Utility:

- PTCS Duct Seal
- PTCS Heat Pump Air Source
- PTCS Heat Pump Ground Source W-A
- PTCS Heat Pump Ground Source W-W

Finally, you can narrow your search by Utility.

*Note:* unless you have associations with more than one utility, only one will be available to choose from.

### Advanced Search

Install Date:

Measure Entry Date:

Status:

Address:

Customer Name:

Tech ID:

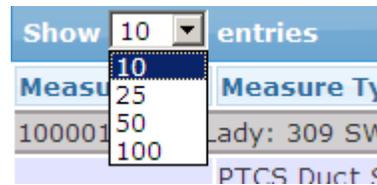
Company Name:

Measure Type:

Utility:

Once all of the search criteria are entered, click the **Search** button or press the **Enter** key to retrieve results. The list of resulting measures will appear on the screen below the search area.

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The number in the left-hand column is a hyperlink to click to view the details of each measure.

If the list of results requires multiple pages, clicking on the left and right arrows on the lower right of the list will allow you to navigate through subsequent pages.

Measure ID	Measure Type	Measure Entered	Status	Install Date
100000 - Karl Hayes: 1069 Cole Way Springfield, OR				
<a href="#">100000</a>	PTCS Duct Seal	2/18/2011	Accepted	02/11/2011

Showing 1 to 1 of 1 entries

\*For simple search Start and End dates are based on the Install Date of the measure

[Export Results](#)

To export all results, navigate to the bottom right of the results list and click the **Export Results** button.

The results will default to a Microsoft Excel spreadsheet with the same information as the measure detail screen (shown in next step) for each record.

Measure ID	Measure Type	Measure Entered	Status	Install Date
100000 - Karl Hayes: 1069 Cole Way Springfield, OR				
<a href="#">100000</a>	PTCS Duct Seal	2/18/2011	Accepted	02/11/2011

Showing 1 to 1 of 1 entries

\*For simple search Start and End dates are based on the Install Date of the measure

[Export Results](#)

When the **Measure ID** in the left-hand column of the search results page is clicked, the detail page for that measure is opened.

In the **Measure Info** page, customer address and specific measure information will be visible.

*Note:* some measures have multiple pages of information. Use the left and right arrows to navigate to other pages, if needed.

The **Find** textbox and button allow for searching of specific text within the detail screen, or exporting the **Measure Info** data to several formats.



The screenshot displays the 'Measure Info' interface for 'PTCS Duct Seal #100000'. At the top, there is a navigation bar with left and right arrows, a page indicator '1 of 2', a search box containing 'Find | Next', and an 'Export' button. A dropdown menu titled 'Select a format' is open, showing options: XML file with report data, CSV (comma delimited), PDF, MHTML (web archive), Excel, TIFF file, and Word. Below the navigation bar, the title 'PTCS Duct Seal #100000' is centered. The main content area is split into two columns. The left column lists 'Karl Hayes' with the address '1069 Cole Way, Springfield, OR 97478'. The right column lists 'Owner: Hayes, K.' with the same address, 'Phone: 541-744-8895', and 'Email: Unknown'.