BEETS

BPA Energy Efficiency Tracking System

Reports Portal

Training Guide v2.0

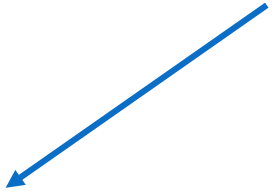
Updated May 11, 2023

How to Use This Guide

The purpose of this guide is to provide BPA customers with a basic understanding of how to run reports on BEETS EEI and invoicing data. *This guide assumes users have a basic understanding of BEETS and how it works. For general instruction around how to use BEETS, visit the BEETS Landing Page > Training Materials & Support Resources for additional resources, or contact the BPA Team for assistance.*

TIPS:

- *We recommend all new users of BEETS Reports Portal scan through the document and table of contents to* ***orient themselves on the content covered****.*
- *Utilize* ***'Ctrl – F' to search for topics or terms*** *you may be seeking guidance around.*
- *Click on* ***Hyperlinks*** *throughout the document to take you to other relevant information.*
- *Click on* ***'Return to Table of Contents'*** *button at the bottom of each page to help navigate.*



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What is the BEETS Reports Portal (i.e. SSRS)?

Microsoft SQL Server Reporting Services (SSRS) is a product that provides a set of tools and services that create, deploy, and manage reports. The ***BEETS Reports Portal*** is built on the SSRS platform and allows users to run on demand custom reports on EEI reporting data. These reports are *updated nightly* and can be exported to view and manipulate offline in a more manageable format. Proceed to the next pages for instructions on how to log in and run these reports.

The following reports are available on demand to BPA utility customers:

- **Activity Report** – Report of all BEETS activity by utility, program and date
- **Utility Grouper Reports** – Summary reports of utility bulk upload data (as well as associated payments and savings data) for UES and Custom Projects Option 2 programs.

Throughout this guide, BEETS Reports Portal will be referred to as 'SSRS'.

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Getting Started

Logging in to the BEETS Reports Portal

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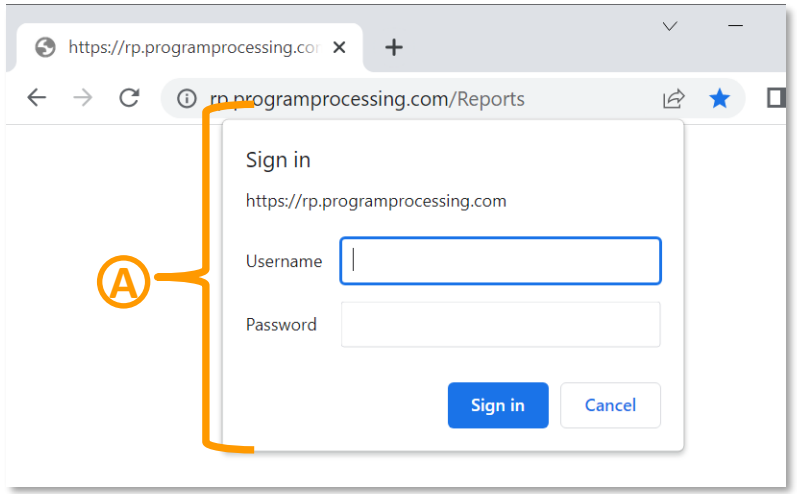
Logging in to the BEETS Reports Portal (SSRS) (1 of 2)

Complete the following steps to log into the BEETS Reports Portal, which lives within a Microsoft SQL Server Reporting Services (SSRS) page. This site will allow you to run reports on demand around your BEETS activity.

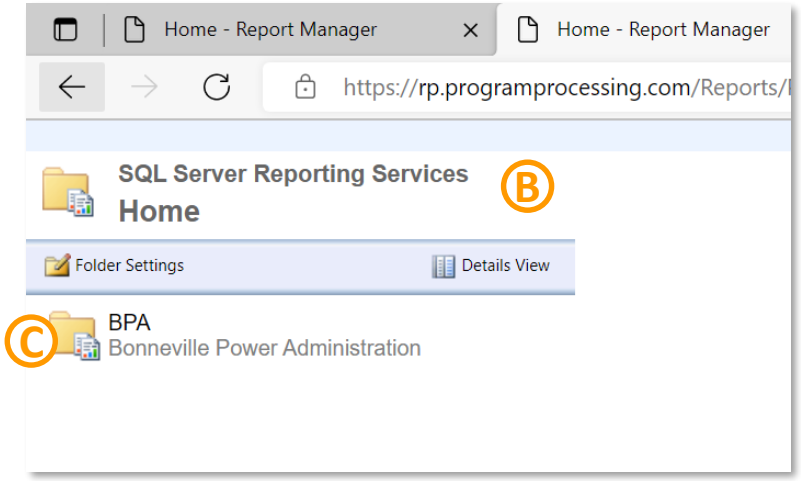
Summary of Steps:

1. Go to SSRS by clicking on this link. We
2. Input your BEETS Username and Password, and click the *Sign In* button. Ⓐ



> ***NOTE:*** *We HIGHLY recommend that users use* ***Google Chrome*** *browser to access SSRS; we have found that Microsoft Edge users have varied login experiences that may lead to issues accessing the BEETS Reports Portal.*

3. If successful, you will be taken to the *SQL Server Reporting Services (SSRS) Home Page*. Ⓑ
4. If you are not taken to the home page, you may need to sync your BEETS password with SSRS, follow the instructions to sync your BEETS and SSRS passwords.
5. Click on the *BPA* folder. Ⓒ



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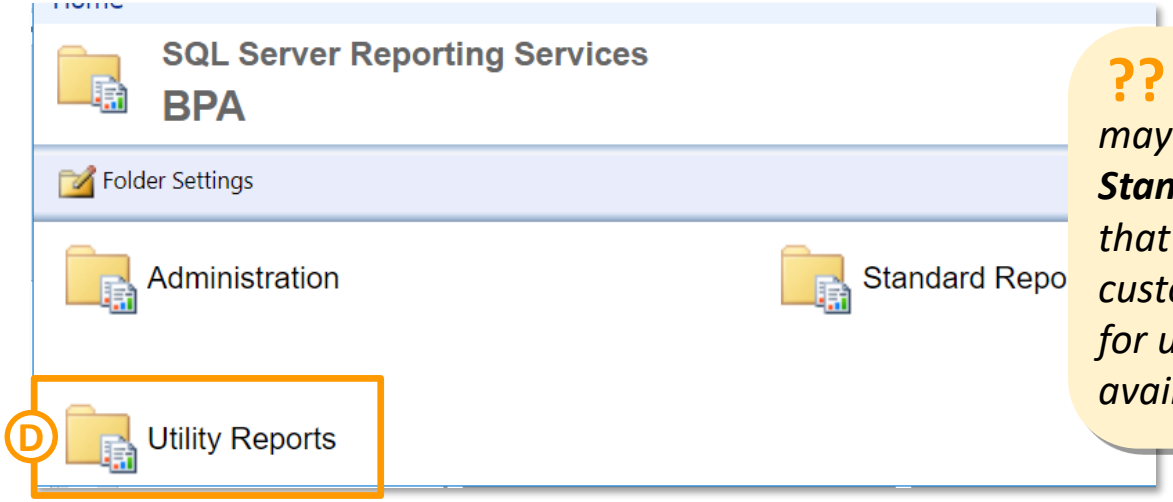
Logging in to the BEETS Reports Portal (SSRS) (2 of 2)

Summary of Steps, continued:

6. Click on the *Utility Reports* folder that appears. Ⓓ (NOTE: May take a minute)



?? *Depending on permissions, some users may have additional folders in view.* ***Standard Reports*** *are out of the box reports that may or may not be valuable for BPA customers, but have not yet been assessed for usefulness.* ***Administration Reports*** *are available to BPA team members only.*

7. You will see two report types (and up to three reports); continue to the next page or click on links below for instructions on how to run these reports: Ⓔ

   a) **BEETS Activity Report** – Report of all BEETS activity by utility, program and date

   b) **BEETS Utility Grouper Reports** – Summary reports of utility bulk upload data (as well as associated payments and savings data) for UES and Custom Projects Option 2 programs (if applicable).

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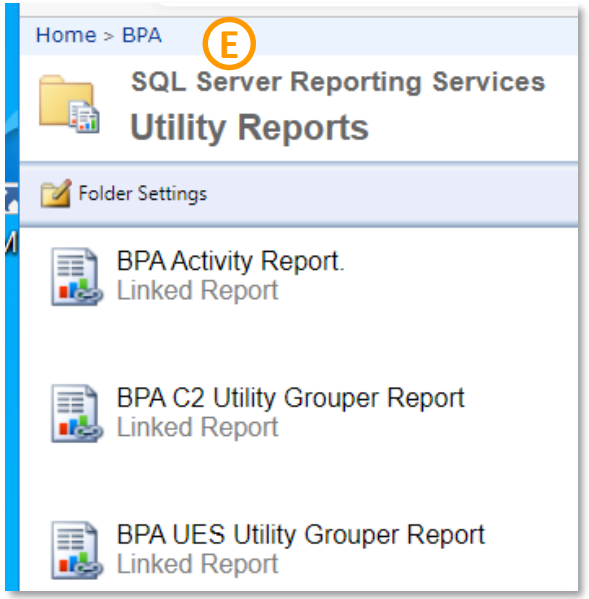

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BEETS Activity Report

Running an SSRS report of utility activity within BEETS

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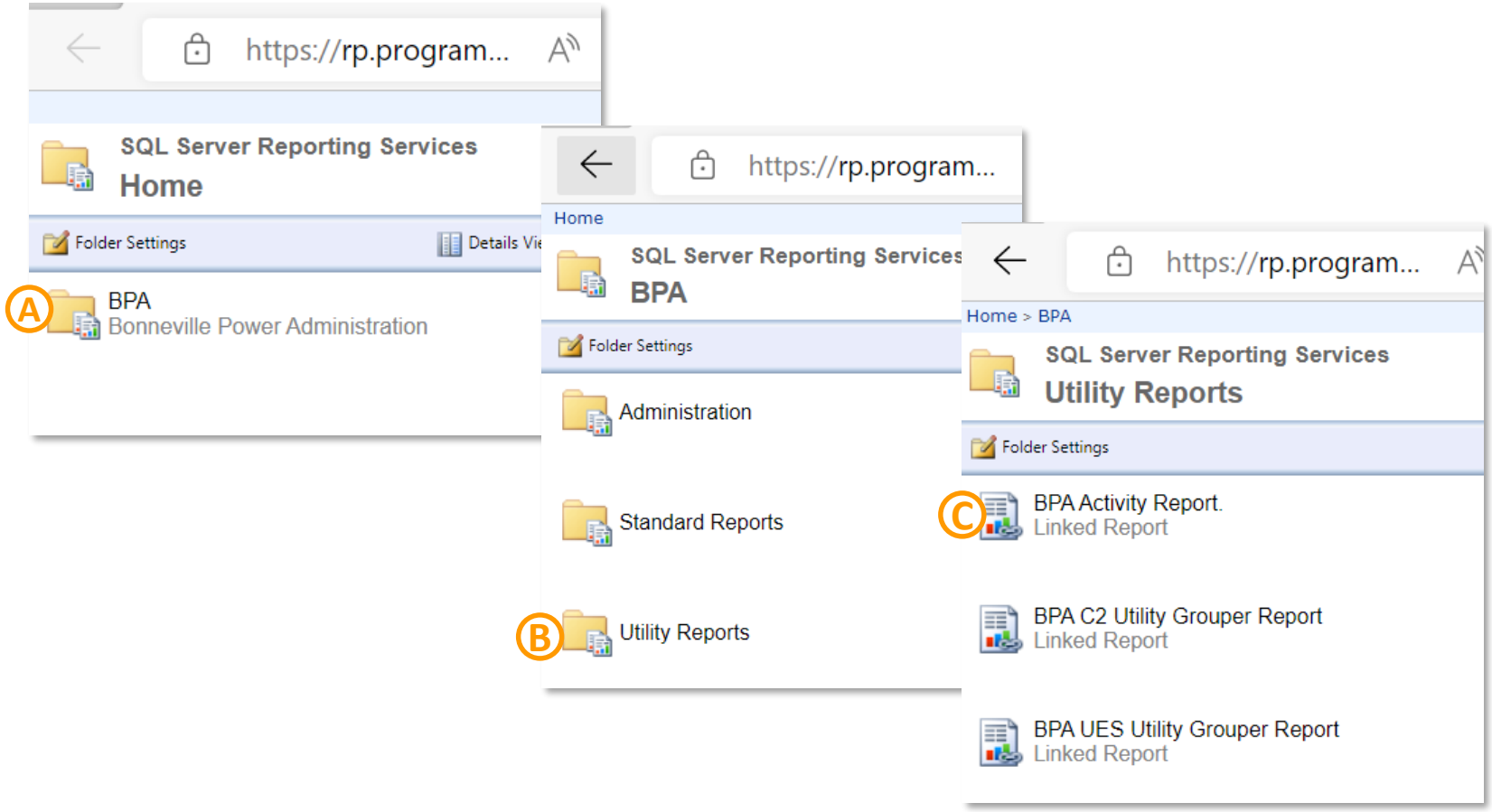
Running the BEETS Activity Report (1 of 3)

This report provides a summary view of all activity within BEETS that can be filtered by utility, program, and/or date range.

Summary of Steps:

1. After logging in to SSRS, select *BPA folder* Ⓐ > *Utility Reports* folder Ⓑ > *BPA Activity Report.* Ⓒ



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BEETS Activity Report Overview (2 of 3)

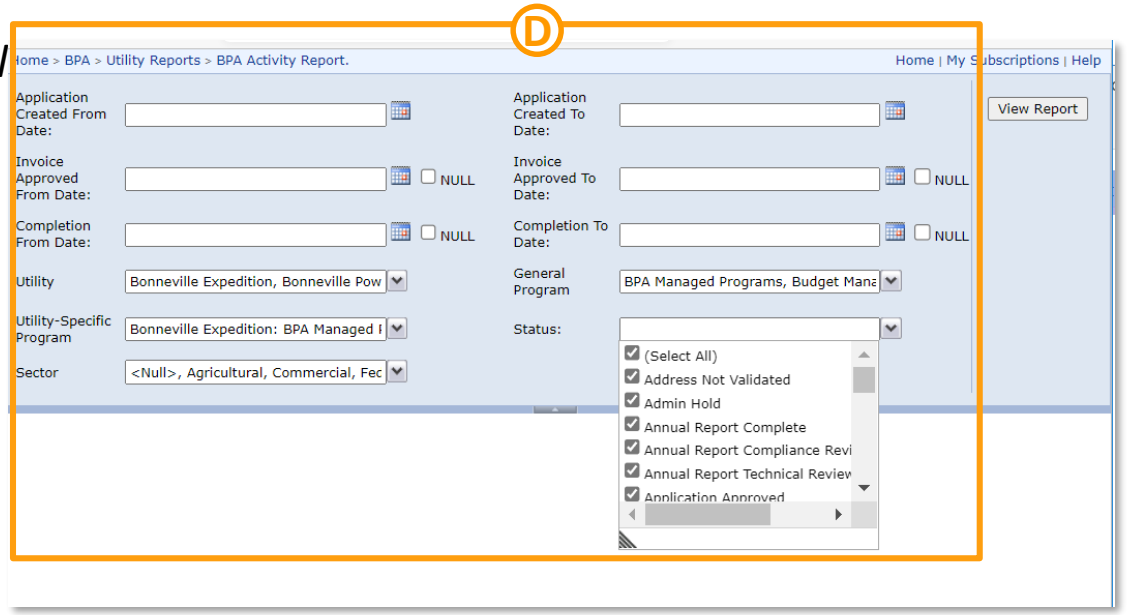
Summary of Steps, continued:

2. Use the drop down options to filter the reports results based on the following criteria. ***(NOTE: you must select values for all criteria to proceed):*** Ⓓ

   - **Application Creation Date Range**: filter by '*Application Created From Date:*' and '*Application Created To Date:*'
   - **Invoice Approval Date Range:** filter by '*Invoice Approved From Date:*' and '*Invoice Approved To Date:*' or select *Null* if not relevant
   - **Completion Date Range:** filter by '*Completion From Date:*' and '*Completion To Date:*' or select *Null* if not relevant
   - **Utility:** filter by *Utility* or *Select All*; you will only see utility data you have access to
   - **Utility Specific Program:** N/A, choose *(Select All)*
   - **Sector:** filter by *Sector* or *(Select All)*
   - **General Program:** filter by *Program* or *(Select All)*
   - **Status:** filter by BEETS workflow *Status* or *(Select All)*

IMPORTANT NOTE ABOUT DATE RANGES: *It is recommended that you select as limited a date range as possible as broader ranges take longer to load.*

Ⓓ



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BEETS Activity Report Overview (3 of 3)

Summary of Steps, continued:

3. Once you select all desired criteria, click the *View Report* button. Ⓔ

This may take some time to run; feel free to take a sip of coffee!

4. Your results will appear in the window below the criteria. Ⓕ

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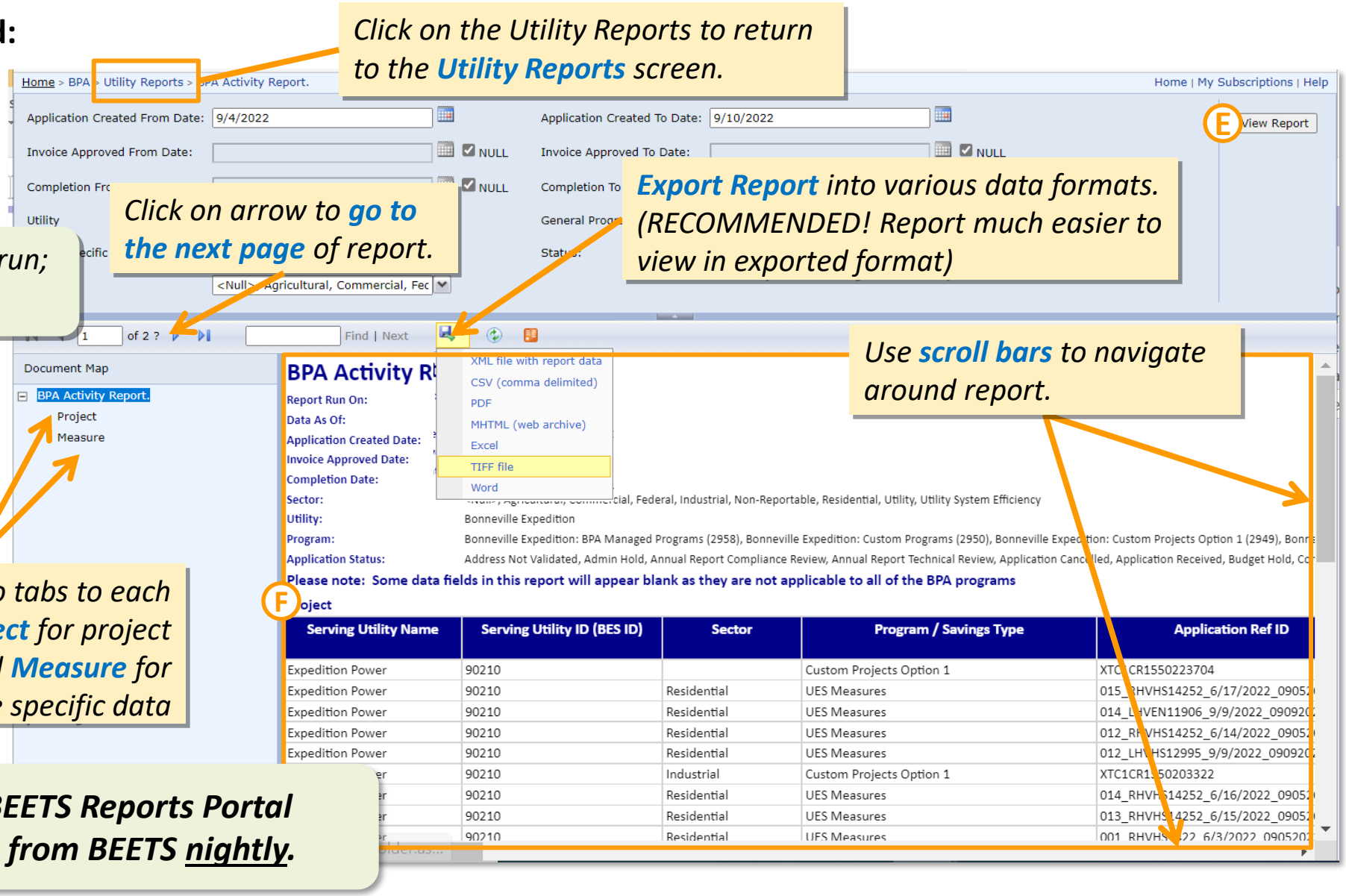

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BEETS Utility Grouper Reports

Running an SSRS report of C2 and UES program bulk upload data

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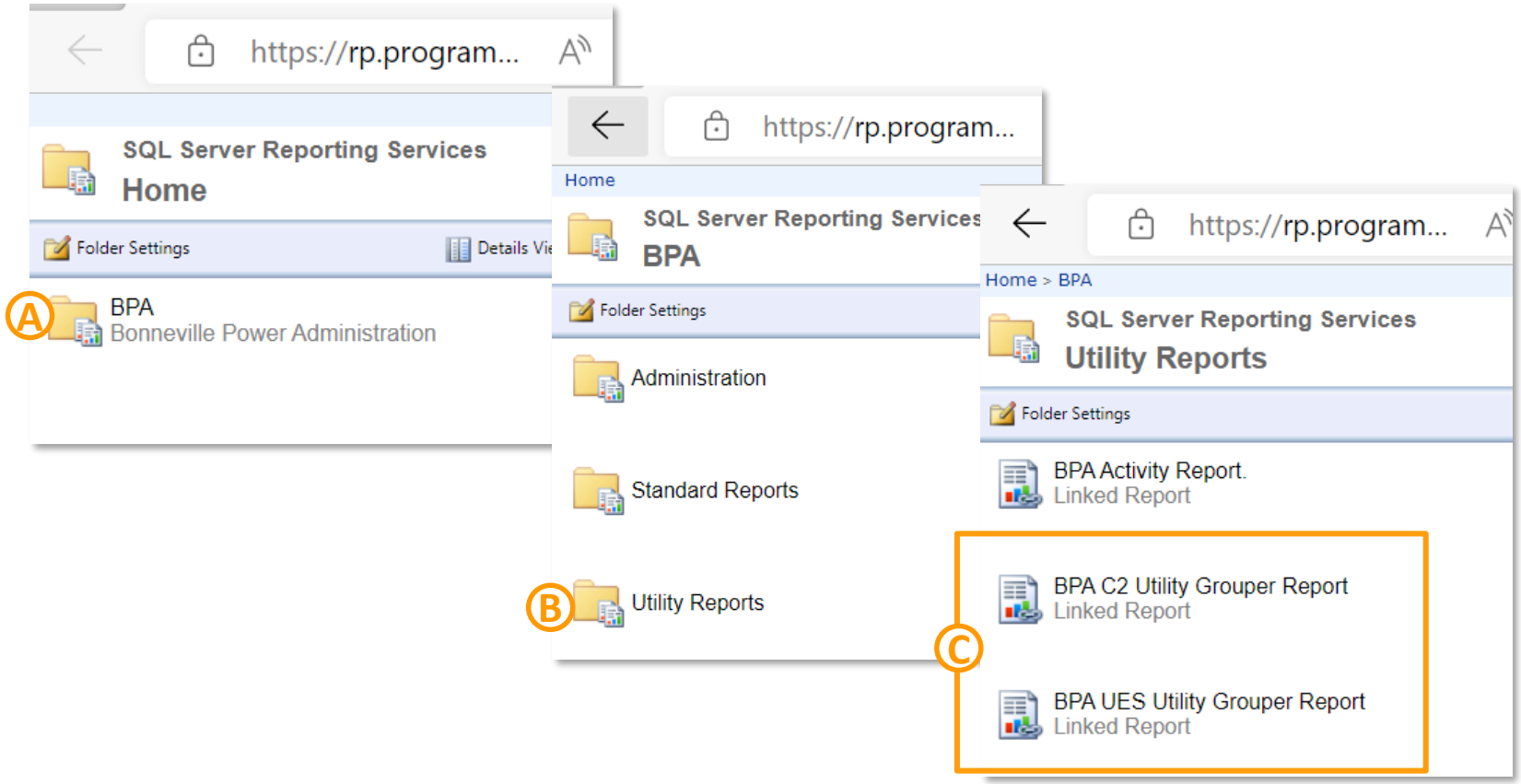
Running BEETS Utility Grouper Reports (1 of 3)

These reports allow you to run summary reports of utility bulk upload data (as well as associated payments and savings data) for UES and Custom Projects Option 2 programs.

Summary of Steps:

1. After logging in to SSRS, select *BPA folder* Ⓐ > *Utility Reports* folder Ⓑ > *BPA C2 Activity Report* or *BPA UES Utility Grouper Report* Ⓒ (based on applicable bulk upload program).



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Running BEETS Utility Grouper Reports (2 of 3)

Summary of Steps, continued:

2. Use the drop down options to filter the reports results based on the following criteria. ***(NOTE: you must select values for all criteria to proceed):*** Ⓓ

   - **Application Creation Date Range**: filter by '*Application Created From Date*:' and '*Application Created To Date*:'
   - **Utility:** filter by *Utility* or (*Select All)*; you will only see data for utilities you have access to
   - **Program:** filter by *Program* or *(Select All)*
   - **Status:** filter by BEETS workflow *Status* or *(Select All)*

IMPORTANT NOTE ABOUT DATE RANGES: *It is recommended that you select as limited a date range as possible as broader ranges take longer to load.*

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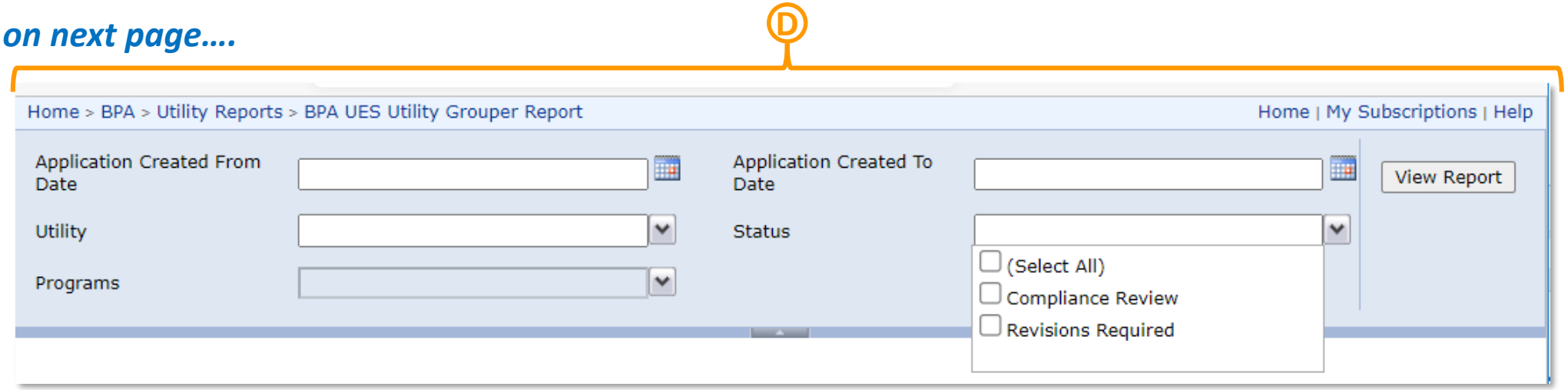

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Running BEETS Utility Grouper Reports (3 of 3)

Summary of Steps, continued:

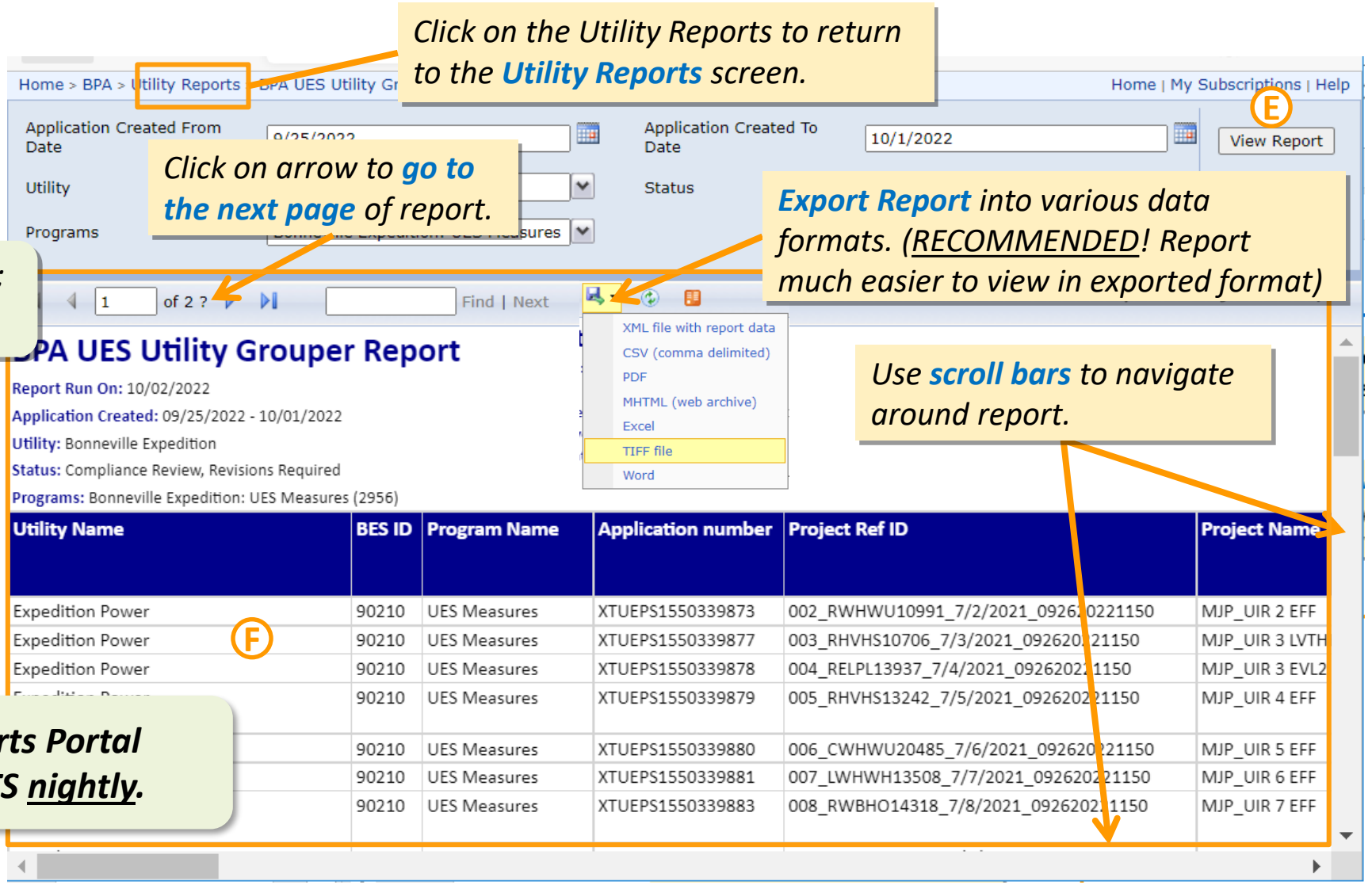
3. Once you select all desired criteria, click the *View Report* button. Ⓔ

This may take some time to run; feel free to take a sip of coffee!

4. Your results will appear in the window below the criteria. Ⓕ

END

REMINDER: *BEETS Reports Portal updates with data from BEETS nightly.*



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BEETS Key Links and Support Resources

Key links and information on finding help using BEETS

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BEETS Key Links & Support Resources

BEETS Landing Page – *Main BEETS informational site on BPA.gov including announcements, information, and links to training and support resources.*

BEETS Site – *Submit EEI reporting and invoices*

BEETS Reports Portal – *Run reports on EEI reporting and invoice data*

BEETS Training Materials and Support Resources – *Find answers to common questions and access training resources*

Additional questions? Contact your EER.

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Appendices

Additional Resources

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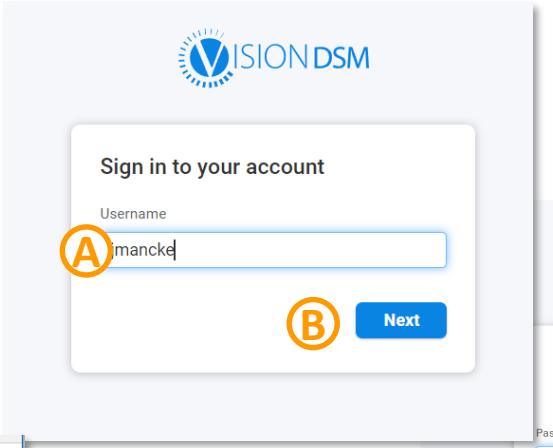
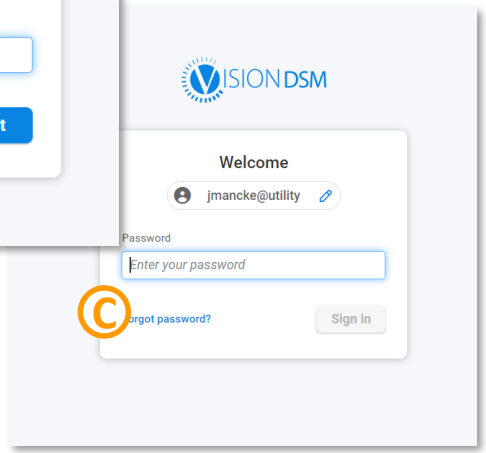
Syncing your BEETS and SSRS Passwords – *MAY BE REQUIRED THE FIRST TIME YOU LOG IN*

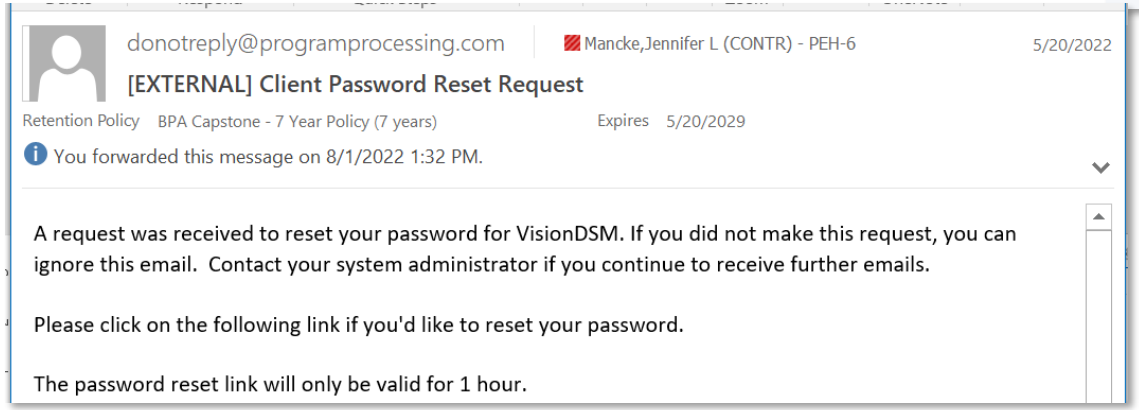
If SSRS was not set up the first time you log into BEETS, you may need to perform the one-time task of syncing your passwords between BEETS and SSRS by resetting your BEETS password. From that point on, you will use the same username and password for both systems.

Summary of Steps:

1. Go to BEETS & enter your username in the *Username* field. Ⓐ
2. Click the *Next* button. Ⓑ
3. When the password screen appears, click *Forgot Password*. Ⓒ
4. You will receive an email with instructions on how to reset your password.







6. Follow the email instructions, wait a few minutes, and then log in to SSRS by following the instructions here. **END**

NOTE: *If you have reset your password and continue to have issues logging in to SSRS, contact BPA.*

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Reports Portal Guide Change Log

Date	Version	Change	Change made by:
11/16/22	1.0	Original Publishing Date	Jen Mancke
11/22/22	2.0	Adjusted login instructions to recommend Chrome	Jen Mancke
05/11/23	2.1	Removed reference to now inactive BEETS inbox	Pia Pimputkar

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