



BPA Online Lighting Calculator User Manual



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DRAFT

Purpose

The document is a master training manual for the Bonneville Power Administration (BPA) Online Lighting Calculator (OLC). It has detailed instructions for utilities to submit a lighting calculator (LC) to BPA.

Scope

This document provides essential information and training for all user types in the OLC. User roles define the content each individual can view and interact with. Here is an overview of each role, including a brief description and their corresponding access permissions.

- Hancock Software personnel: full access, with the ability to make code changes.
- BPA Administrators: set incentive rates, add BPA users, add utilities and trade allies, and create their administrators.
- BPA Users: add projects, edit, and regular use.
- Trade Ally Users: add projects, edit, and regular use.
- Utility Administrators: add utility users, set utility incentives, and regular use.
- Utility User: edit and approve projects, and regular use.

Glossary of Terms

The new OLC has been built on an existing cloud-based platform. As a result, some of the names used in the past with LCs are different in the new OLC.

Previous Lighting Calculator	Online Lighting Calculator	
	Hancock Cloud	MINT
Incentive	Project cost	
Invoiced (e.g. sent to BEETS)	Status of Submitted to Utility or Submitted to BEETS	
Measures		Items
Project	Application	
Project Name	Customer Name	
Report		Proposals
Spaces (e.g. walk-in cooler)		Areas
Utility	Energy Consumption	

➤ Hancock Cloud vs. MINT

The Online Lighting Calculator consists of two parts: Hancock Cloud, and MINT.

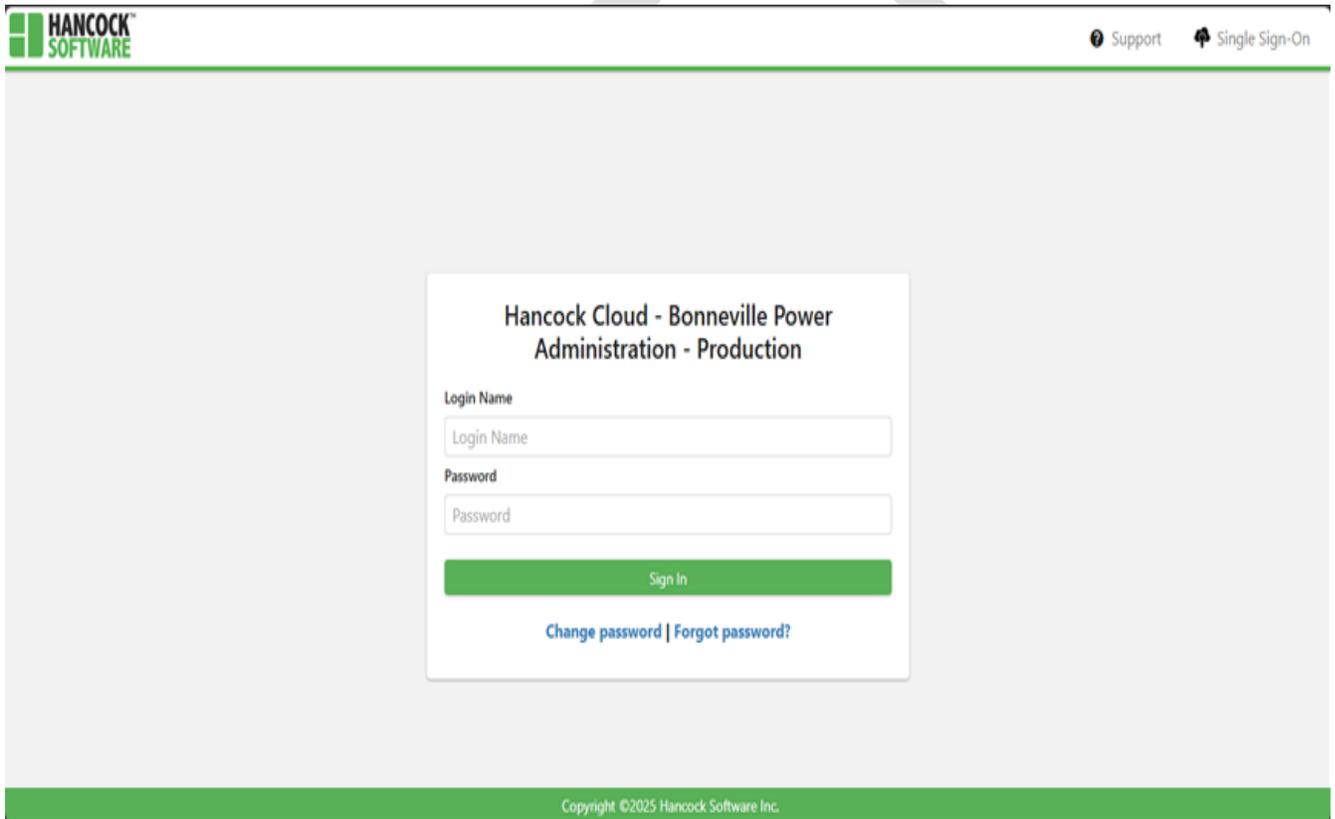
- Hancock Cloud is Hancock Software's home platform (website). This is where you start projects, manage them, and submit them to a utility or ultimately to BPA Energy Efficiency Tracking System (BEETS).
- MINT is an application that can be downloaded to a tablet or laptop for use in the field when Internet connections may or may not be available. MINT is the engine that runs energy saving calculations. The typical use-case is that projects are created in Hancock Cloud, then synched to MINT for data entry and calculations, and then synched back to Hancock Cloud to be finished.

How To

- Log into Hancock Cloud
 - Hancock provides an online Hancock Cloud, which is used to start every project. This is a website accessed with your internet browser. Hancock Cloud - Bonneville Power Administration <https://bpa.hancocksoftware.com/HEEC/#/login>
- Create Administrator Account

BPA creates all utility and trade ally administrator accounts, and utility and trade ally provides the name and email address for the person who will serve as an administrator. The utility and trade ally administrators can create subsequent user accounts for their own organization. If your organization needs a new admin account, please email your request to lighting@bpa.gov.

 - Utility or trade ally sends a request to lighting@bpa.gov setting up an administrator account.
 - Utility or trade ally administrator adds new users for your organization.
 - See administrative account functions for further instructions.
 - Enter your username and password sent by BPA into the login screen.
 - Hancock Cloud website: [Bonneville Power Administration - Production](#)



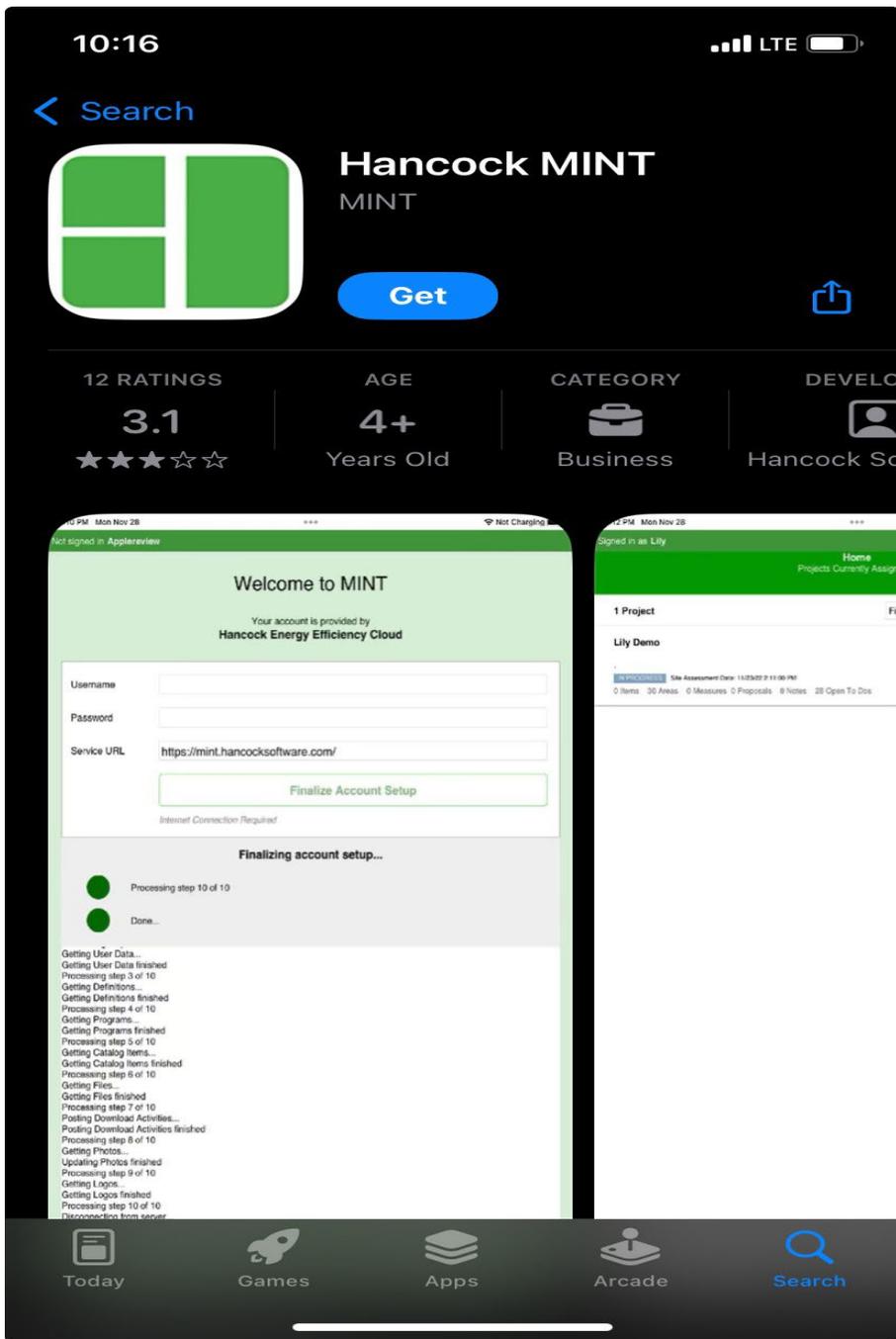
- What is MINT

MINT is an application available on Microsoft Windows and Apple iPadOS and MacOS, providing utilities and trade allies the ability to input lighting calculator details while offline supporting in the field usage. You will use MINT after you enter the project into Hancock Cloud based OLC.
- Installing MINT: Apple iPad and Macintosh computers

You can download MINT on your tablet, but it is not compatible with an iPhone.

 - Go to the app store and download Hancock MINT Mobile Intake Tool.
 - The Apple app store will have the most recent version of the MINT app available. Ensure automatic

updates are selected or be prepared to check for updates every time you use the app. If your settings do not allow automatic updates, choose to allow them manually when available.



- Installing MINT: Microsoft Windows
 - Go to the Hancock Software download page, link below, and select the Version appropriate for your system. <https://bpa.hancocksoftware.com/mint/>.
 - Run the installation .exe, an install wizard will assist you with the process



Hancock Software Bonneville Power Administration MINT Production Support

MINT Installation Page: updated 3-9-2025 5PM ET - build 1510 Production Build

[Windows 11 64-bit standard install kit](#)

[Windows 11 64-bit MSI for Managed Desktops](#)

[Apple MacBook installation package](#)

[Hancock MINT \(Apple TestFlight\)](#)

[AppStore iPad/iPhone Public build 1472](#)

For organizations that do not allow individuals to install their own software, work with your organization's IT department to get the right version (usually the MSI one) installed.

Starting a Project

- Once logged into Hancock Cloud, you'll see the **ADMIN** screen below or similar depending on User type.
 - Click the **Application** button on the left side of the screen to get started.

The screenshot shows the Hancock Software ADMIN interface. The top navigation bar includes the Hancock Software logo, the word "ADMIN", and user information: "William_Crabtree_BPA_Admin", "MINT", "Support", and "Sign Out". Below the navigation bar is a menu with options: "Organization", "Intake Template", "User Login Details", "Failed Login Details", "MINT Data Mapping", "BO Management", "Bulletin Board", "Audit Log", and "More". The main content area displays a table of organizations with columns: "Short Name", "Organization Name", "Inactive", "Org Code", "Business Type", "Business Function", "FED Tax ID", "State Tax ID", "Email", and "Can Create Organizations". The table is filtered to show "Process ALL 142 Records". The "Monmouth" organization is highlighted in yellow. The bottom of the page shows "Page 1 of 8 (142 items)" and a pagination control.

Short Name	Organization Name	Inactive	Org Code	Business Type	Business Function	FED Tax ID	State Tax ID	Email	Can Create Organizations
> Richland	Richland	<input type="checkbox"/>	10089	Utility					<input type="checkbox"/>
> USN Bangor	USN Bangor	<input type="checkbox"/>	10409	Utility					<input type="checkbox"/>
> Okanogan Coop	Okanogan Coop	<input type="checkbox"/>	10285	Utility					<input type="checkbox"/>
> KTU	KTU	<input type="checkbox"/>	13927	Utility					<input type="checkbox"/>
> Albion	Albion	<input type="checkbox"/>	10055	Utility					<input type="checkbox"/>
> Ellensburg	Ellensburg	<input type="checkbox"/>	10072	Utility					<input type="checkbox"/>
> Monmouth	Monmouth	<input type="checkbox"/>	10083	Utility					<input type="checkbox"/>
> Northern Lights	Northern Lights	<input type="checkbox"/>	10278	Utility					<input type="checkbox"/>
> Whatcom	Whatcom	<input type="checkbox"/>	10451	Utility					<input type="checkbox"/>
> UEC	UEC	<input type="checkbox"/>	10388	Utility					<input type="checkbox"/>
> Mason 1	Mason 1	<input type="checkbox"/>	10246	Utility					<input type="checkbox"/>
> Bonners Ferry	Bonners Ferry	<input type="checkbox"/>	10062	Utility					<input type="checkbox"/>
> DOE-RL	DOE-RL	<input type="checkbox"/>	10426	Utility					<input type="checkbox"/>
> Missoula	Missoula	<input type="checkbox"/>	10259	Utility					<input type="checkbox"/>
> Minidoka	Minidoka	<input type="checkbox"/>	10082	Utility					<input type="checkbox"/>
> Big Bend	Big Bend	<input type="checkbox"/>	10027	Utility					<input type="checkbox"/>
> Tillamook	Tillamook	<input type="checkbox"/>	10376	Utility					<input type="checkbox"/>
> Idaho Falls Power	Idaho Falls Power	<input type="checkbox"/>	10204	Utility					<input type="checkbox"/>

- Click the **New Application** button on the far right top of the screen.

The screenshot shows the Hancock Software APPLICATION interface. At the top right, there are user and system information: William_Crabtree_BPA_Admin, MINT, Support, and Sign Out. Below this is a navigation menu with options like Admin, Application, Allocation, Container, Project, Invoice, Configuration, Export Data, Vendor, and Project Approval. The main area displays a table of records with columns: Client Number, Client Status, Customer Name, Customer Name 2, Total Monthly Income, Applied Date, Project Street Address, Project City, Project Zip Code, and Phone. A red arrow points to the 'New Application' button in the top right corner of the table area.

- Complete the application **Contact** information. Please note that “Customer Name” is the Project Name (and will be transferred to MINT), Customer name 2 is any additional info related to the project, and Customer Contact name is the actual name of a person at the site. (Note: the asterisk (*) identifies required fields).

The screenshot shows the 'New Application' form. At the top, there are buttons for 'New Application', 'Client Letter', and a 'More' dropdown. Below this is the 'Application Info' section with buttons for 'Cancel', 'Save', 'Verify Address', 'Save Settings', and 'Unit Info'. The 'Contact' section contains the following fields:

- Customer Name*
- Customer Name 2
- Customer Contact Name
- Email
- Project Street Address*
- Project City*
- Project State*
- Project Zip Code*
- Phone*
- Alternate Phone
- Service Address Status
- Federal Building
- Mailing Same As Project Address
- Mailing Street Address*
- Mailing City*
- Mailing State*
- Mailing Zip Code*

Below the 'Contact' section are expandable sections for 'Application', 'Energy Consumption', and 'Comments'.

- Click the **Energy Consumption** bar
- In the Energy Consumption (Utility) section, click **New** and select **Utility Name**.
- Energy Consumption = Utility in this section

- Click **Save** when complete.

BC test 2/4 [02/04/2025] x

Application Info Application Qualification 

Cancel Save Verify Address Save Settings Unit Info

(111) 222-3333 Unverified

Mailing Same As Project Address

Mailing Street Address* Mailing City* Mailing State* Mailing Zip Code*

101 Main Select... Select... 98888

Application 

Energy Consumption 

Remove  New

<input type="checkbox"/>	Utility	Comment
<input type="checkbox"/>	BPA - Electricity 	

Comments

Change History

- Switch tabs by clicking the **Application Qualification** tab.
- Click the **Qualify** button, enter and pick the correct **Allocation (Rate Period)** by checking the box next to the allocations available and then close the window. Doing so connects the Allocation (Rate Period) to the project.

Application - BC test 2/4

New Application Client Letter More - 

BC test 2/4 [02/04/2025] x

Application Info Application Qualification 

Qualify 

Client Allocations 

Requested Allocations 

<input checked="" type="checkbox"/>	Allocation	Wap Rank
<input checked="" type="checkbox"/>	RP_FY24_FY25	1

Messages

Allocation Name	Messages	Date/Time
RP_FY24_FY25	Client is Eligible	2/4/2025 1:42:01 PM

➤ Create Project

- Check the box next to the application you want to make into a project, then click **Create Project**.
- Click **OK** on **Information** popup.

Client Number	Client Status	Customer Name	Customer Name 2	Total Monthly Income	Applied Date	Project Street Address	Project City	Project Zip Code	Phone	Alternate Phone
1034443391	Job Created	BPA Child	E2E		12/16/2024	1	Portland	12345	(111) 111-1111	
2138930097	Application received	BPA Child	E2E		12/16/2024	1	Portland	12345	(111) 111-1111	
1321006213	Information missing	Bill Crabtree	Bill Crabtree		12/16/2024	143 Main St.	Canby	97123	(503) 111-2222	

- After creating the project move to the **Project** tab on the left hand side of the screen, double click on the **Project Number** to open the project detail screen.

Client Name	Project Number	Job Type	Allocation(s)	Agency	Address	County
BC test 2/4	0000000203		RP_FY24_FY25	BPA	101 Main, Aberdeen, WA 98888	

- In the **Project Detail** screen
 - Select the **Funding Source** (usually EEI)
 - Select the **Sector** (e.g. commercial or industrial)
 - Click on the **Schedule** bar, then **New** to add a scheduled activity
 - In the **Task** dropdown select **Assessment**
 - Add the person who will do the assessment (usually from the same Trade Ally/Utility): this is required to get the project to sync to MINT.
 - Input **Scheduled Date**
 - Click **Save** (Note: must complete all fields in order to Sync to MINT)

Project Detail

Project Info | Client Info | Building Info | Validate | Invoice

Project Name: BC test 2/4 | Address: 101 Main, Aberdeen, WA 98888 | County: | Allocations: RP_FY24_FY25

Total Cost: \$ 0.00 | Completed Date: | Unique Site ID: 203 | Sector: Select...

Project Name: 0000000203 | Funding Source: Select...

Notes: Add Note(s) here!

Schedule

Activity	Task	Person	Scheduled Date	Duration Hours	Status	Last Date
Activity	Assessment	William_Crabtree_BPA_A...	2/4/2025, 2:38 PM			

This completes all the required inputs for the project initiation in the Hancock Cloud and will allow the project to sync to the MINT application.

➤ **Copying and Fixing a Project**

- When projects are not approved by BPA in BEETS, the project needs to be reworked in the Hancock Cloud and/or MINT.
If a copy is wanted (for reference purposes) proceed as follows, begin as above, starting with **New Application**.
- Once the new application is made double, click on the **Project Number**.

Client Name	Project Number	Job Type	Allocation(s)	Agency	Address	Cou
BC Copy 2/12/25 BC Copy 2nd	000000222		RP_FY24_FY25	BPA	101 Main St., Aberdeen, WA 98888	
BC Copy 2/12 BC Copy	000000221		RP_FY24_FY25	BPA	101 Main St., Aberdeen, WA 98888	
2/12 Grocery Store Upload Test	000000220		RP_FY24_FY25	BPA	1111, Portland, OR 12345	
2/12 Invoice Test	000000219		RP_FY24_FY25	BPA	1234, Portland, OR 12345	
BC 2/1 NC Test New Construction in MINT	000000218		RP_FY24_FY25	BPA	101 Main St., Aberdeen, WA 98888	
Lindsey School K-12 Test	000000217		RP_FY24_FY25	BPA	777 Heaven Ave., Portland, OR 97222	

- Click on the **More** drop-down menu, then click **Copy Project**.

Project Detail

Project Info Client Info Building Info Validate Invoice Project History: Current More All Reports Save Cancel

Client Name: BC Copy 2/12/25 BC Copy 2nd Address: 101 Main St., Aberdeen, WA 98888 County: Copy Project Upload Project

Total Cost: \$ 0.00 Completed Date: Allocations: RP_FY24_FY25

Project Name: 000000222 Unique Site ID: 222 Sector: Select...

Funding Source: Select...

Notes:

- From the **Copy Project** screen, search for the application to copy the project into (recommend to sort by name); then click the checkbox and then click **Copy To**.

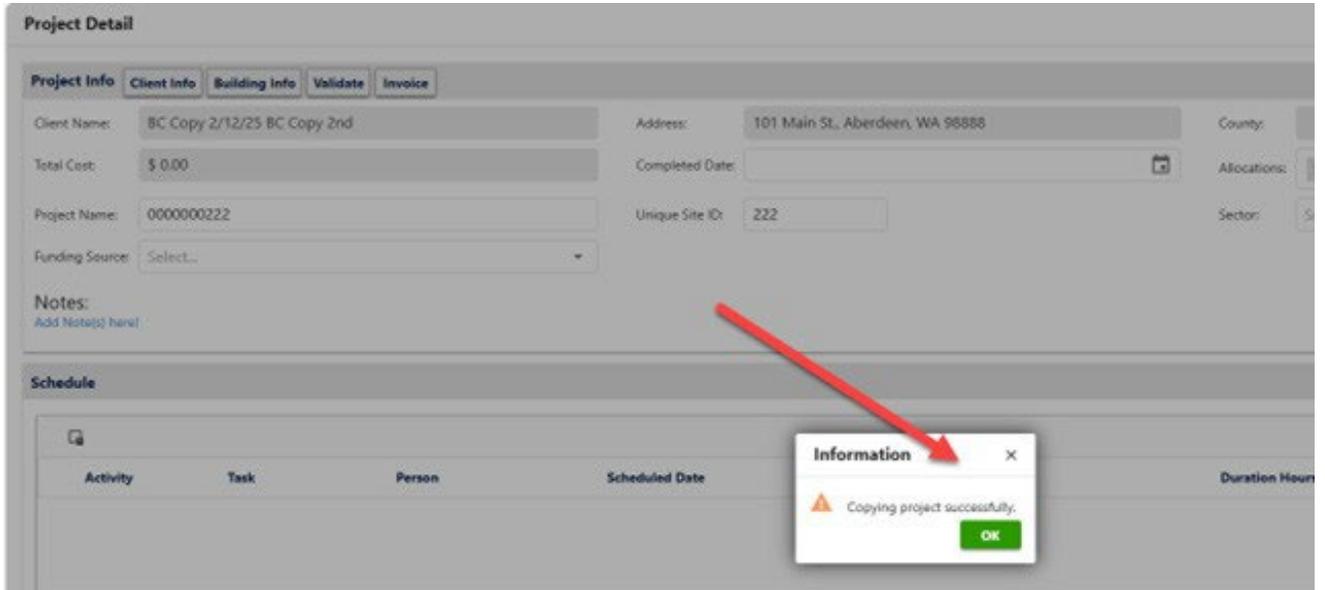
Copy Project

Clear Search

First Name	Last Name	Client Status	Street	Apartment	State	City	Zip	Co
bc copy 3 2/12								
<input checked="" type="checkbox"/>	BC copy 3 2/12	copy attempt 3 BC	Eligible	101 Main St.	WA	Aberdeen	98888	

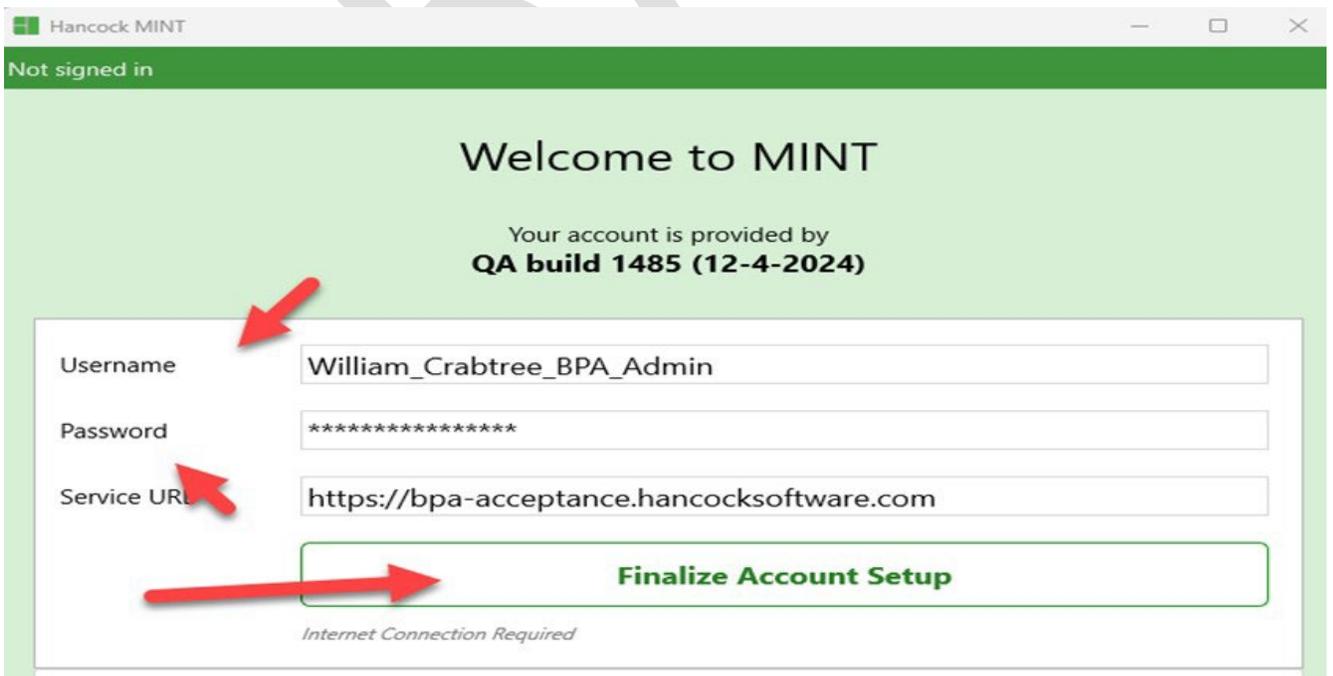
Copy To Cancel

- Click OK.



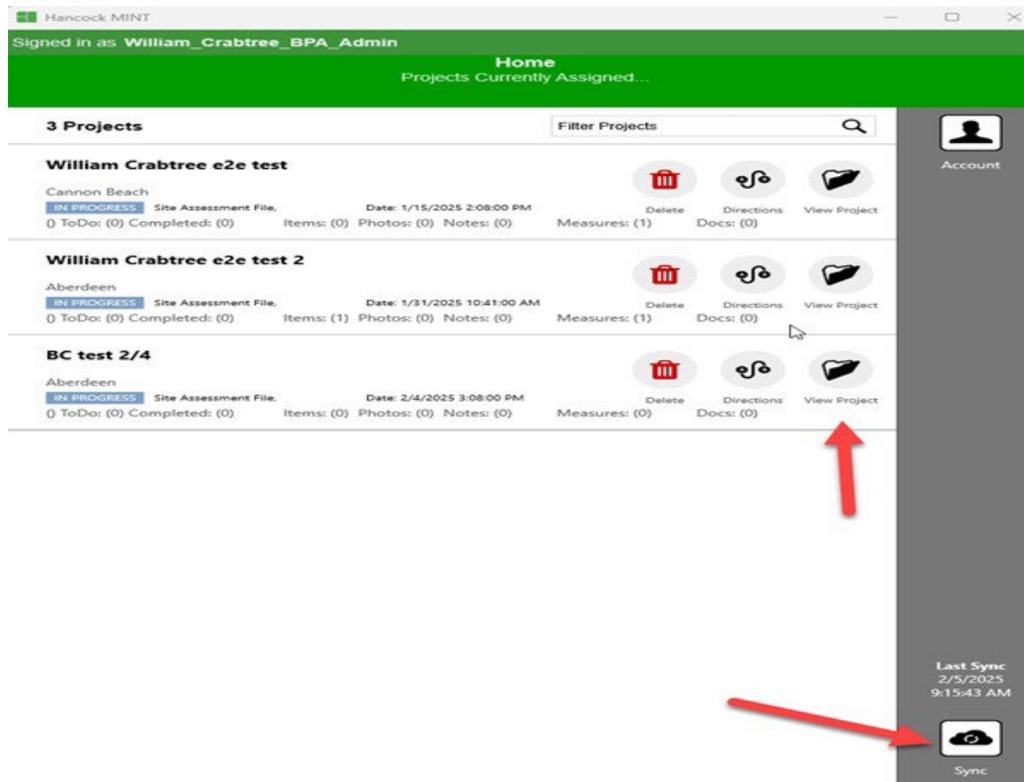
MINT

- Open **MINT** on your tablet or laptop, sign in with username and password, and press **Finalize Account Setup** the first time you use those credentials. You will also need to finalize Setup if you sign in with a different combination of username and password (e.g., an admin account vs. user account.)
 - Note: this could be the same person who started the application in Hancock Cloud or a different person assigned the assessment. Only people who are scheduled to do an assessment will can see the project after it's "synced."

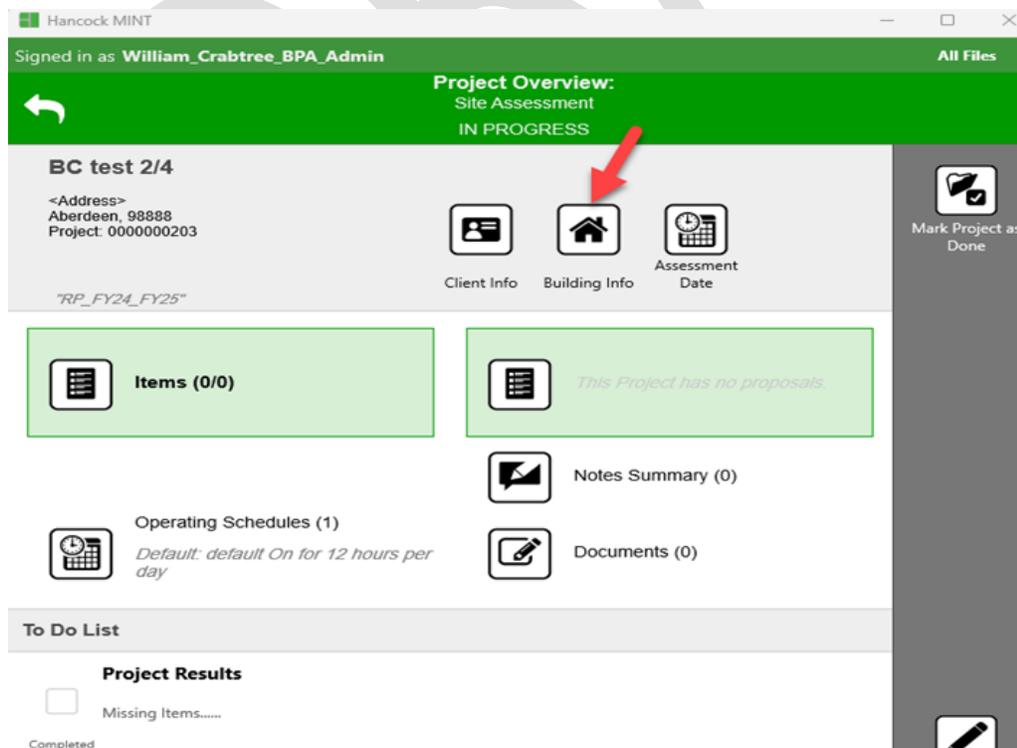


- The MINT app will show that it's connecting, then show all the projects assigned to you.
 - Ensure you are connected to the internet.
 - To get the project from the Hancock Cloud to MINT, click the Sync button on the MINT main page

➤ After sync, locate the project and click **ViewProject**.



➤ Click on **Building Info** to begin entering the project information.



- Enter **General** information and answer the 4 questions that will determine if the job is considered a retrofit or new construction.

General

MINT Message

Mode

OM Savings (%)

Baseline Eligibility

Is the facility or exterior lighting system newly constructed?

Is the facility a newly constructed addition to an existing facility?

Is there a change in the occupancy type as part of the lighting project?

Is the project a major renovation for reasons other than lighting?

Based on your responses the project is defined as:

- Enter **Project Information** including:
 - Building type (from the drop-down list)
 - Estimated project cost
 - Space Conditioning (Heating, Ventilation, Air Conditioning (HVAC) information).

Project Information



Building Type

Estimated Project Cost

Space Conditioning



Heating Type

Cooling Type

- Enter **Operating Schedule** (baseline for the entire site):
 - Note: if you check the “Full Year” box the total will be 8760 hours and the days will disappear.

Operating Schedule ←

Full Year ↗

Sunday	0
Monday	12
Tuesday	12
Wednesday	12
Thursday	12
Friday	12
Saturday	10
Weeks per Year	52
Annual Hours	3640

- Click the **Return Arrow** in the upper left corner to return to the main project screen.

Hancock MINT

Building Info
BC test 2/4

←

Notes

Saved Notes... Save Last Note New Note

Utility Bills

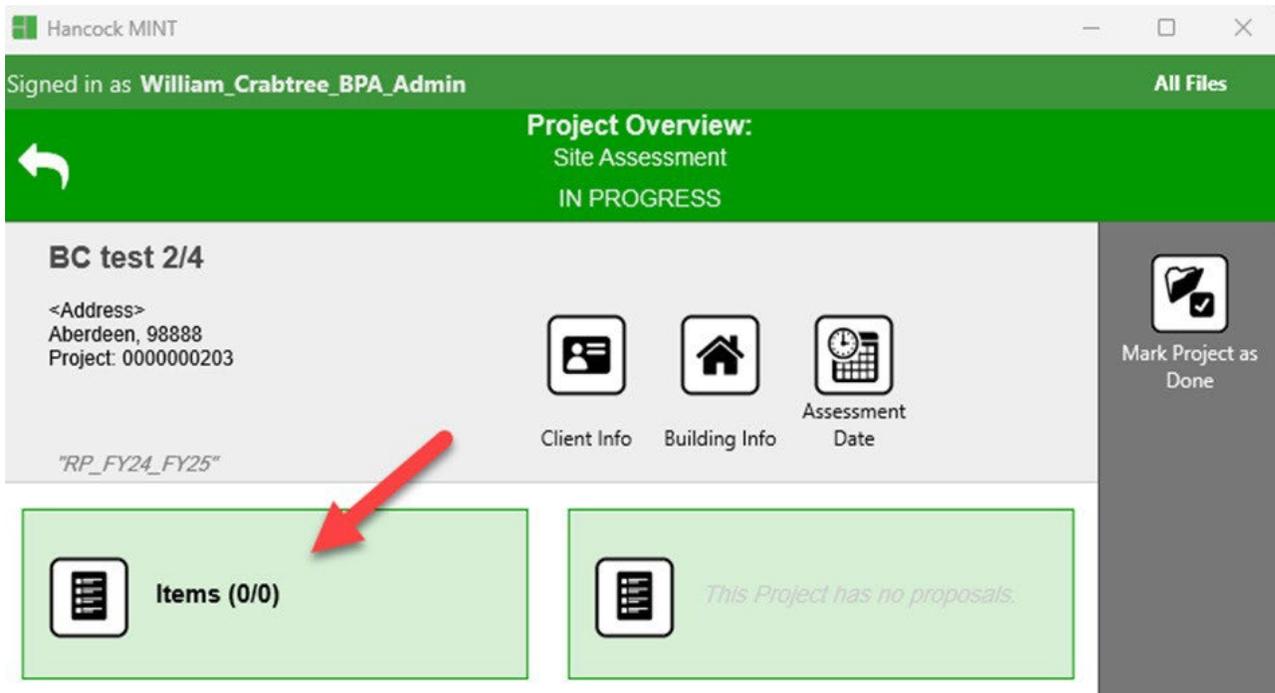
Electricity Vendor: BPA

Account Number:
UNIT COST NOT SET!

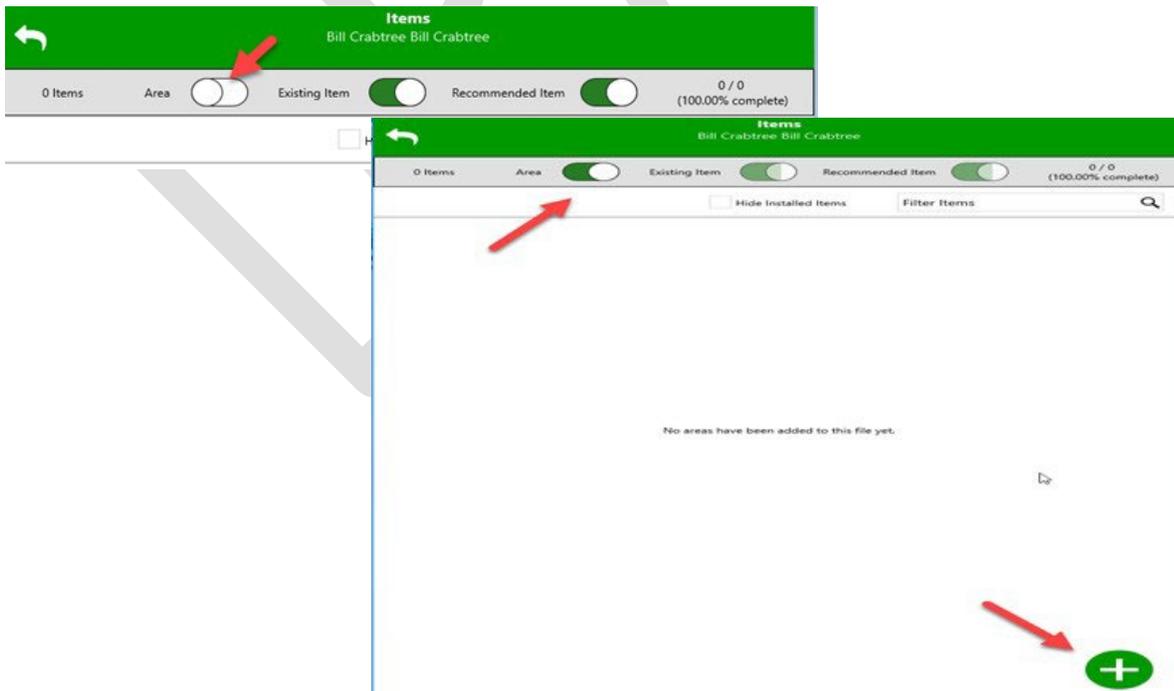
Remove Edit..

Adding Measures

- Now that the overarching building characteristics are identified, move to adding specific items (Measures) to each area.
 - Click into the Items bar, add **Measures** which are called **Items** in MINT.



- You will see the **Area** slider is not green or ready to go
 - Move the **Area** slider and it will turn green
 - Click on the **Plus** sign circle



- Now you can begin entering **Area**, existing (assuming retrofit) and replace equipment
 - Enter the **Area Name** where it says Area. For this example, we will use “office”.
 - After entering “office”, click the **Plus** sign across from **Lighting Existing**. This will allow the user to begin entering the existing equipment to be retrofitted.



Office



Search Existing Items and Measures

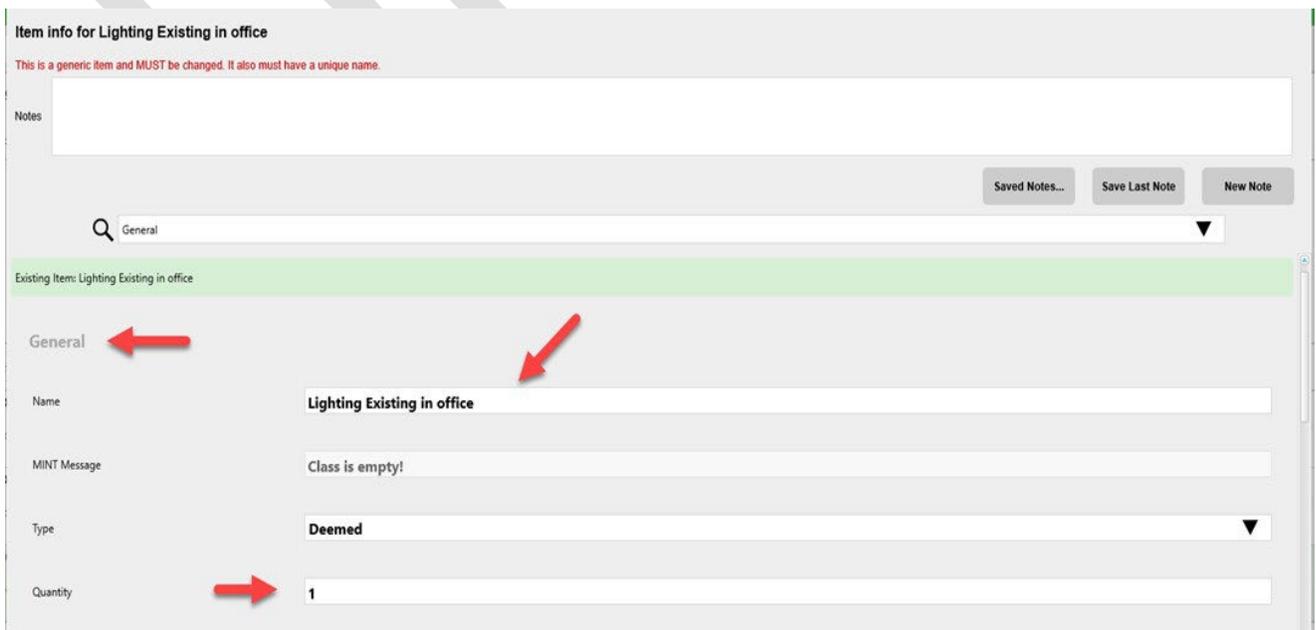
Lighting Existing

Existing Catalog Item - (Lighting)
Generic item, must be changed

+

This Area

- The new screen shows the **Name** of the Item and **Measure** (change if needed to track area/installations. For example, the assessor might have other items in the office and to clarify which one they could add “exit sign,” “overhead,” or “wallpacks,” as needed to clarify.)
 - Enter the general information including Name, Type (of lamp), and quantity.



Item info for Lighting Existing in office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

General

Name: Lighting Existing in office

MINT Message: Class is empty!

Type: Deemed

Quantity: 1

- After updating the **Quantity** in the previous step, start entering the **Measure Details** (for the example below, we'll do a fluorescent to LED retrofit).
 - Note: the ballast factor is brought up automatically after the top sections are completed.

Hancock MINT

Area and Item
BC test 2/4

Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes... Save Last Note New Note

General

Measure Details

Class	T10
Category	6 ft
Subcategory	VHO Lamp/ Mag Ballast
Lamp Wattage (Deemed)	0160
Lamps per Fixture (Deemed)	0001
Ballast Factor	1.1

- Enter the **Controls** detail (if applicable)
 - For this example, we'll use an occupancy sensor that saves 10 percent. If the Area has different HVAC or Hours, check the appropriate box and enter the appropriate information.

Controls

Control	✓
Control Class	Occ. Sensor
Quantity of controls	1
Percent Reduction in Hours	10

Item info for Lighting Existing in Office

This is a generic item and MUST be changed. It also must have a unique name.

Notes

Saved Notes...

Save Last Note

New Note



General



HVAC

Different HVAC?



Different Hours?



HVAC

Different HVAC?

Heating Type

No heating



Cooling Type

No cooling



Different Hours?

Sunday

24



Monday

24

- After all the existing equipment is entered, click the **Recommend** button (bottom left corner) to open up the **Replacement/Retrofit** info window.

Bottom of page

Recommend  Done

- Best practice for tracking existing and replacement items: It is highly recommended that the Name be updated. In this case, an update to add “in office” (so Lighting Replacement in Office) would be appropriate. This helps other people who look at the project connect existing and replacement equipment.
- If this is a decommissioning project, check the Decommission box and enter the appropriate information including FEWER lamps than before to complete the **Measure Details** section.

The screenshot displays a software interface for configuring a lighting replacement measure. It is divided into two main sections: 'Recommended Measure: Lighting Replacement' and 'Measure Details'.

Recommended Measure: Lighting Replacement

- General**
 - Name: **Lighting Replacement in office**
 - MINT Message: **Class is empty!**
 - Type: **Deemed** (dropdown menu)
 - Quantity: **1**
 - Decommission: (checkbox, highlighted with a red arrow)

Measure Details (highlighted with a red arrow)

- Class: **LED** (dropdown menu)
- Category: **Gen. Indoor / Outdoor** (dropdown menu)
- Subcategory: **Standard** (dropdown menu)
- Lamp Wattage (Deemed): **0020** (dropdown menu)
- Lamps per Fixture (Deemed): **0001** (dropdown menu)
- Ballast Factor: **1**

- Note: if the project is adding controls, check that box for the existing equipment regardless of whether they’re present or not at that time. This will automatically show the controls information in the recommended section.
- For example, the same controls type and percent reduction have been entered. When the existing and retrofit equipment has been entered, MINT will show the Measure Level Results.

- When complete, click **Done** button, at lower right corner.

Measure Level Results

HVAC Interaction Factor	1
Reduction in Watts (%)	89
Total Incentives (\$)	110
Adjusted Annual Savings (kWh)	1534
Controls	10

Recommend **Done**

➤ Repeat adding **Measures** as needed for all retrofits and better than code installations for **New Construction**.

- As noted before, to move to the previous screen use the white arrow in the upper left hand corner of the page.
- If the **Lighting Replacement** (in office for our example) is wrong and needs to be redone, click the 3 dots and then Remove to redo the entry.

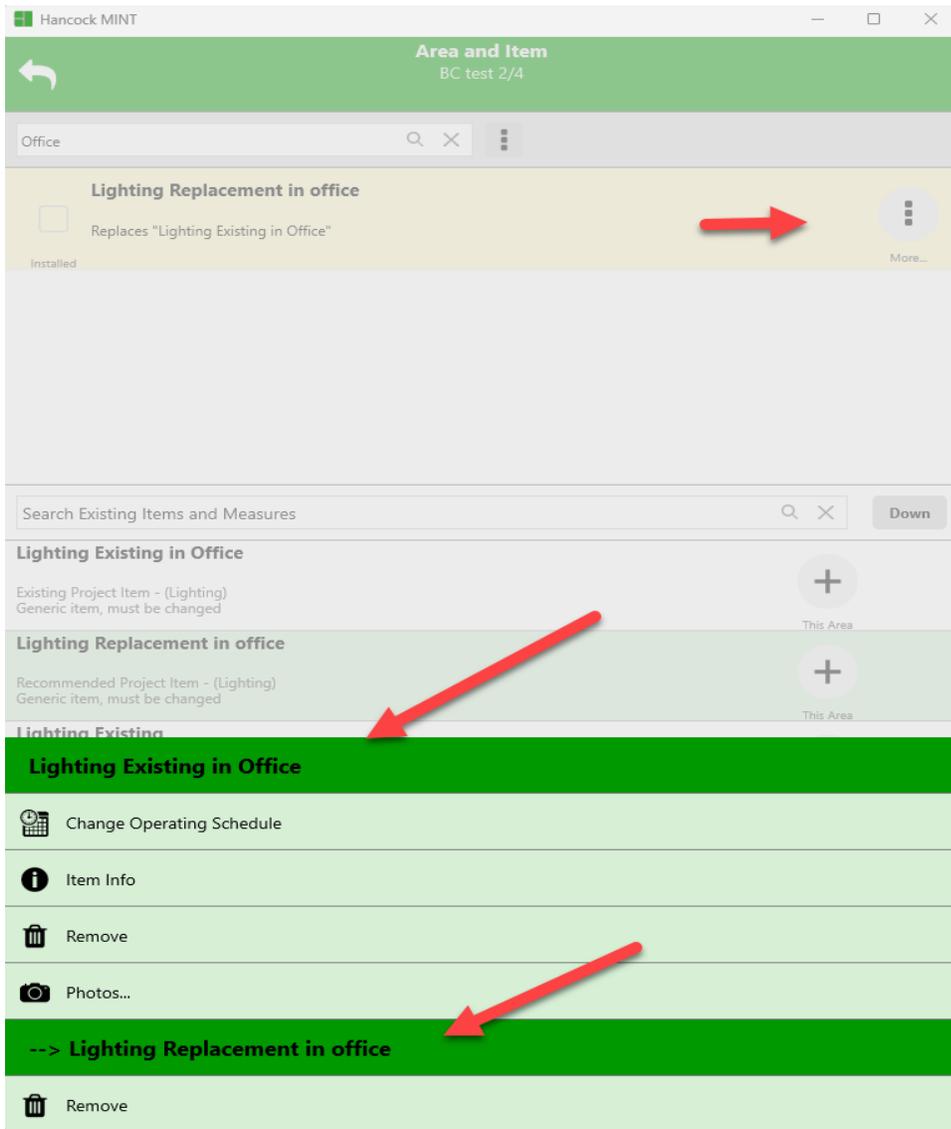
Hancock MINT

Area and Item
BC test 2/4

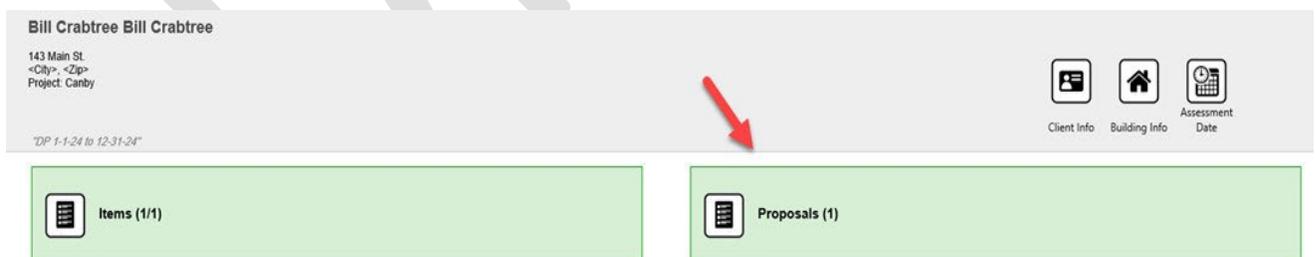
Office

Lighting Replacement in office
Replaces "Lighting Existing in Office"
Installed

More...



- To see the results, click the **Proposals** button.



➤ Reports: there are 3 reports available.

The first two reports are identical to the reports from the prior lighting calculator and each is shown in a screenshot below. The third report is a way to check the kilowatt-hour (kWh) and incentive if needed.

- Important: These reports can be accessed in the Hancock Cloud, open each report and click the “Save and Submit” button in the lower left corner of the page.

The screenshot displays the 'Cost Saving Analysis' interface. At the top, a dropdown menu titled 'Select a Report from the list' is open, showing options: 'Client Report', 'Client Report', 'Summary Report', and 'Calculation Checks'. A red arrow points to the first 'Client Report' option. Below this is the 'Lighting Project Proposal' section with the project name 'BC test 2/4'. The 'Project Detail Summary*' table is shown below:

Measure	Measure Description	Quantity***	Units	Incentive per Unit	Total Incentive
Lighting Replacement in office	Gen. Indoor / Outdoor	1	fixture(s)	110	110
				Total	111

Below the table is the 'Explanation of Utility Incentive' table:

A. Itemized Incentive Total:	\$111
B. Total Estimated Project Costs:	\$500
C. 70% of Estimated Project Costs Incentive Cap:	N/A
D. Maximum \$0.50 per kWh (Project Level) Incentive Cap:	N/A
E. Total Incentive = Lesser of "A", "C", and "D" above:	\$111

Footnotes below the tables:

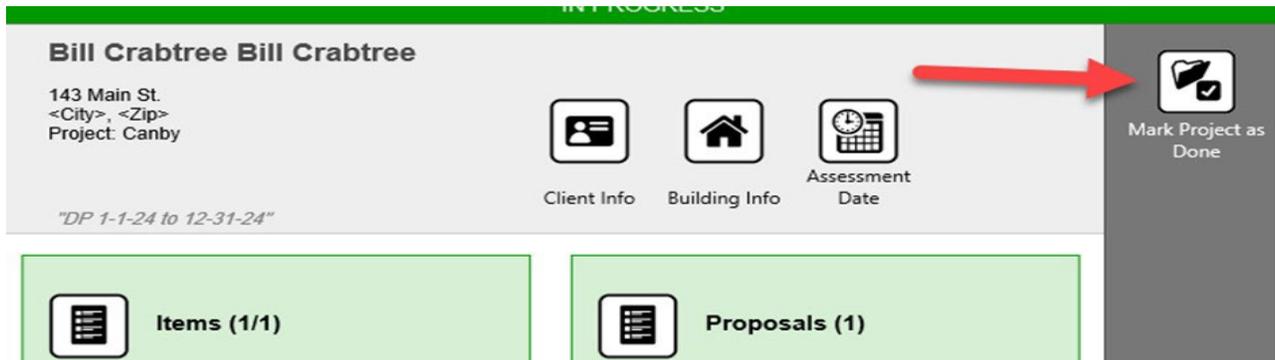
- * The dollar amounts listed in the Project Detail Summary are estimated based on the available utility incentives for which this project may qualify. Actual incentives paid may vary based on, but not limited to, the following factors: 1) all non-standard measures must be approved by BPA; and 2) utility incentives may be capped based on a predetermined maximum incentive per project.
- ** The default value for annual O&M savings is 3% of the project cost. Your utility can override this value.
- *** The kWh savings reported in the Project Detail Summary may differ from those reported above in the Project Overview due to adjustments made to savings in the Project Detail Summary. Savings figures in the Project Overview are estimated on-site savings that a customer may realize, while savings figures in the Project Detail Summary have been adjusted for federal standards and BPA busbar.

At the bottom left, there is a 'Save and Submit' button with a red arrow pointing to it. Above the button, the text 'Updated 1/27/2025 13:47 (EST)' is visible.

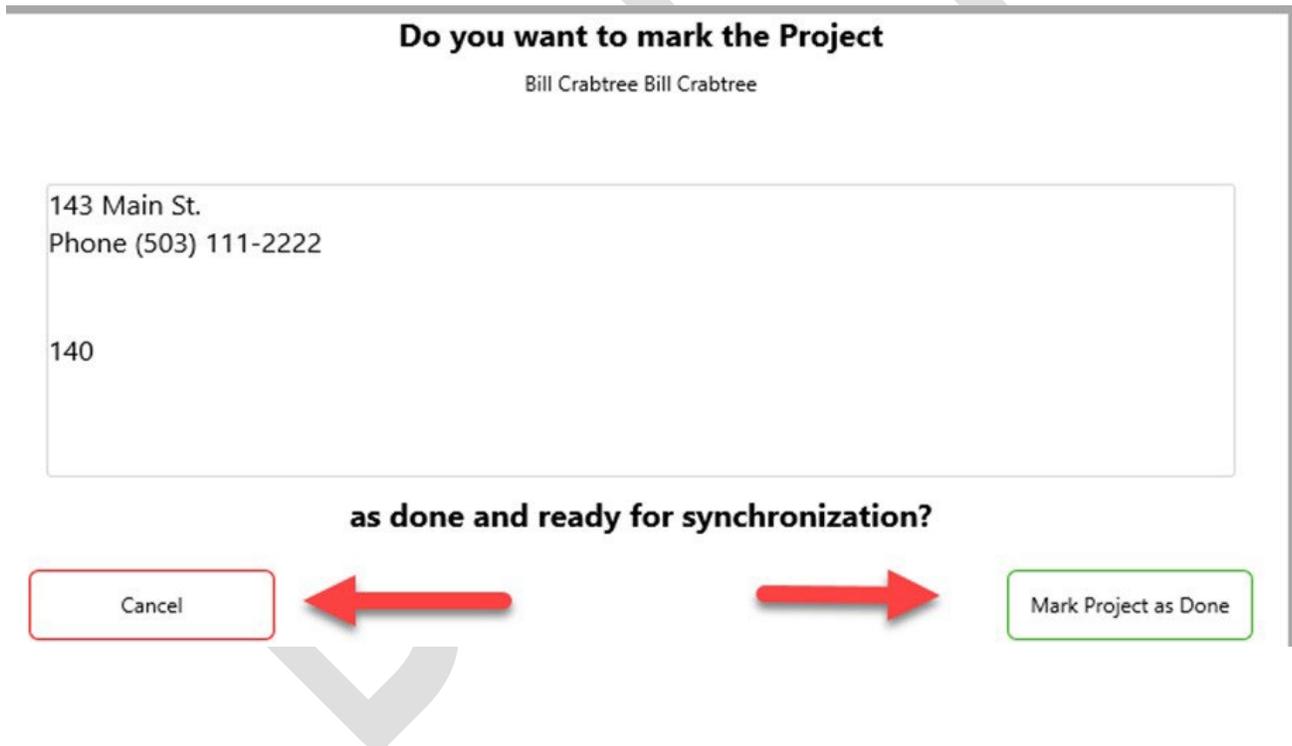
- When done, use the return arrow and get back to the main page, click the **Sync** button, then the information will be sent to the Hancock cloud.

When done in MINT

- When the project is 100 percent completed in MINT, click the **Mark Project as Done** button.
 - Note: this will remove the project from the front page of MINT.
 - You'll have one more chance to back out if needed.



- **Mark Project as Done**, return to the main page, and sync MINT back to the Hancock Cloud. Please ensure you are connected to a network when you sync.



Finishing in the Hancock Cloud

- Now that the project has synced from MINT back to the Hancock Cloud, it is time to send it to the utility. Click on the **Project** button and find the project to be moved along (invoiced). Our example is project 0000000140. Double click the **Project Number** to open it.

Client Name	Project Number	Job Type
Trade Ally Utility Handoff	Trade Ally Utility	
Aaron 12.18.2024	Trade Ally Utility	
Recalc Test Project	Trade Ally Utility	
Project Name Test 12/18	Project Name Test	
New Construction Reports Lindsey Test	0000000146	
Peter Floyd	0000000145	
Kirk Beets and kWh savings test	0000000144	
Trade Ally 12/18	0000000143	
12/17 Project Name Test	Test Name	
TA Invoice Test	0000000141	
Bill Crabtree Bill Crabtree	0000000140	

- Open the **Measure Management** bar and click on the **Assign Allocation** line from the drop-down menu to connect to the correct rate period.

Project Detail

Project Info Client Info Building Info Validate Invoice Project History: Current More All Reports Save Cancel

Client Name: Bill Crabtree Bill Crabtree Address: 143 Main St., Canby, OR 97123 County: [Empty]

Total Cost: \$ 0.00 Completed Date: [Calendar Icon] Allocations: DP 1-1-24 to 12-31-24

Project Name: 0000000140 Unique Site ID: 140 Sector: Select...

Funding Source: Select...

Notes: Add Note(s) here!

Schedule

Measure Management

Assign Allocation DP 1-1-24 to 12-31-24 Apply Clear Search Save Cancel Save Profile Total: 1

- Choose the correct allocation (rate period), check the box, then click the **Apply** button.
 - Note: if not entered via MINT, enter the total costs to proceed.

Measure Management

Assign Allocation: DP 1-1-24 to 12-31-24 **Apply** Clear Search Save

<input checked="" type="checkbox"/> Class Identify	Area Name	Measure Name	Invoice Status	Total Cost	Remaining Amount
<input checked="" type="checkbox"/> Lighting	office	Lighting Replacement		\$0.00	\$0.00

- Click X in the upper right to return to the **Project** section, click on the small box next to the project, then click the **Invoice** button.

HANCOCK SOFTWARE PROJECT

More Process All 138 Records **Invoice** Validate Delete

<input type="checkbox"/>	Client Name	Project Number	Job Type	Allocation(s)
<input type="checkbox"/>	Trade Ally Utility Handoff	Trade Ally Utility		DP 1-1-24 to 12-31-24
<input type="checkbox"/>	Aaron 12.18.2024	Trade Ally Utility		DP 1-1-24 to 12-31-24
<input type="checkbox"/>	Recalc Test Project	Trade Ally Utility		DP 1-1-24 to 12-31-24
<input type="checkbox"/>	Project Name Test 12/18	Project Name Test		DP 1-1-24 to 12-31-24
<input type="checkbox"/>	New Construction Reports Lindsey Test	0000000146		DP 1-1-24 to 12-31-24
<input type="checkbox"/>	Peter Floyd	0000000145		2024, DP 1-1-24 to 12-31-24
<input type="checkbox"/>	Kirk Beets and kWh savings test	0000000144		DP 1-1-24 to 12-31-24
<input type="checkbox"/>	Trade Ally 12/18	0000000143		DP 1-1-24 to 12-31-24
<input type="checkbox"/>	12/17 Project Name Test	Test Name		DP 1-1-24 to 12-31-24
<input type="checkbox"/>	TA Invoice Test	0000000141		DP 1-1-24 to 12-31-24
<input checked="" type="checkbox"/>	Bill Crabtree Bill Crabtree	0000000140		DP 1-1-24 to 12-31-24

Admin Application Allocation Container **Project** Invoice Configuration Measure Export Data Vendor Project Approval

- Confirm the correct allocation has been entered, then pick an invoice number or New Invoice checkbox (used for our example), then click the **Save** button.

Create Invoice

Allocation: DP 1-1-24 to 12-31-24

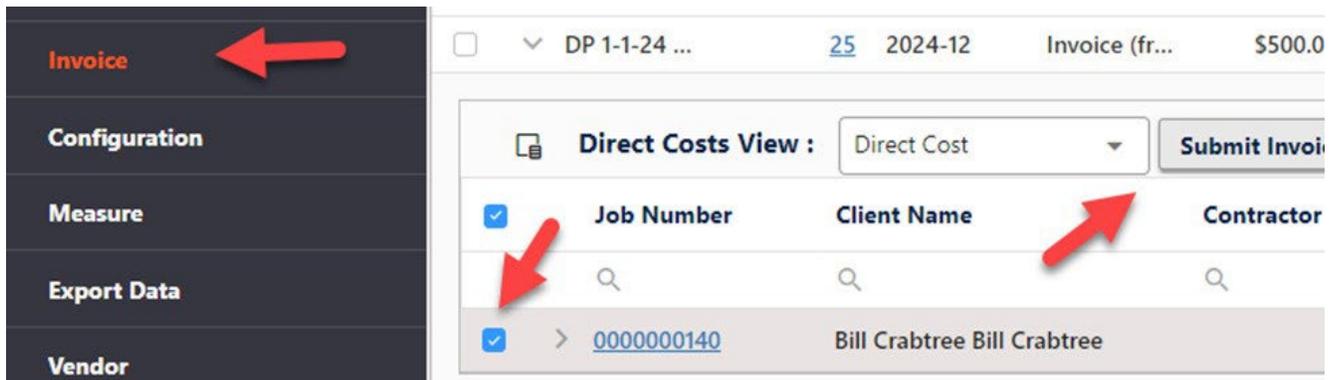
New Invoice

Reporting Month: 2024-12

Invoice Number: Select Month

Save Cancel

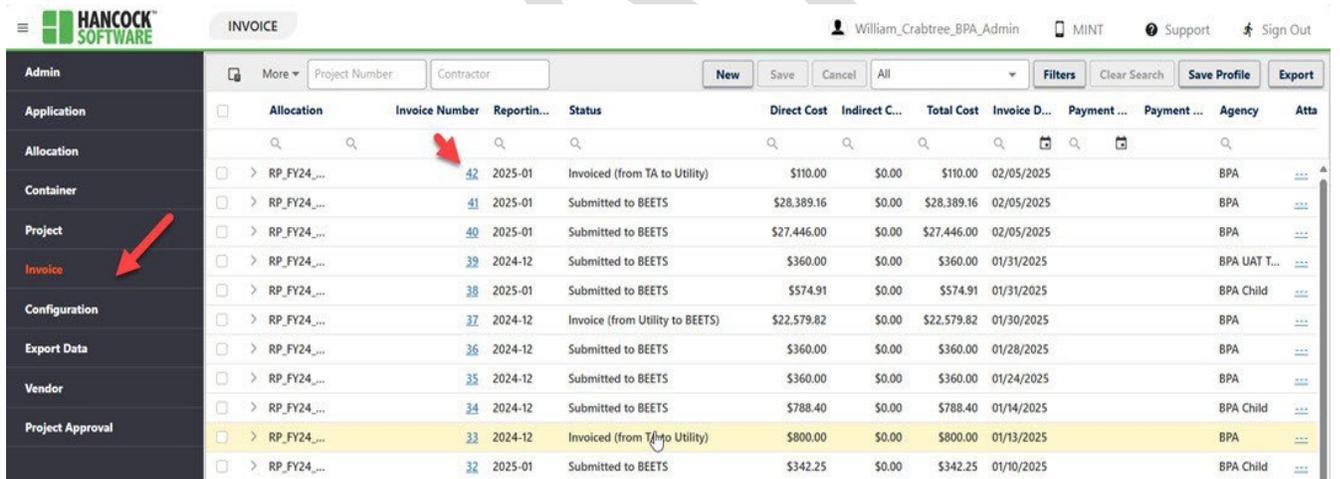
- Go to the **Invoice** page, find the project, double click on the invoice number to get the **Direct Costs View** screen.
 - Click the **Check Box** and then press the **Submit Invoice** button.



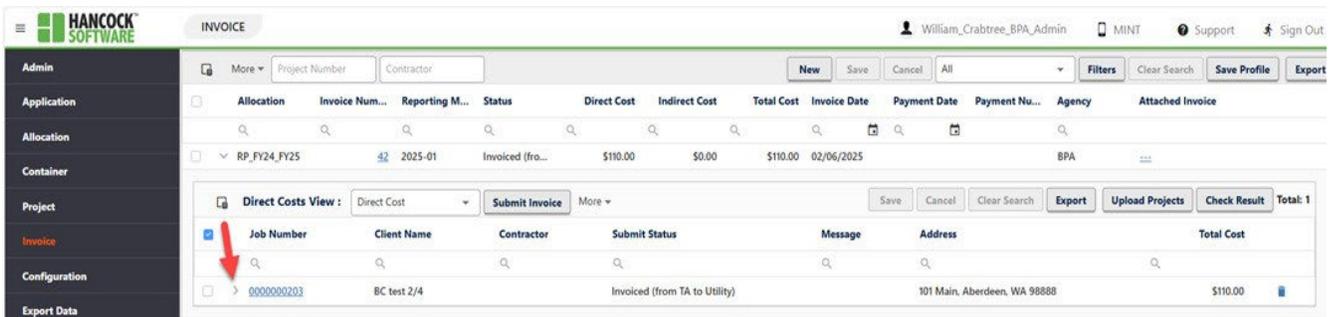
- The Status will be **Invoiced** (From TA to Utility).

Utility Work

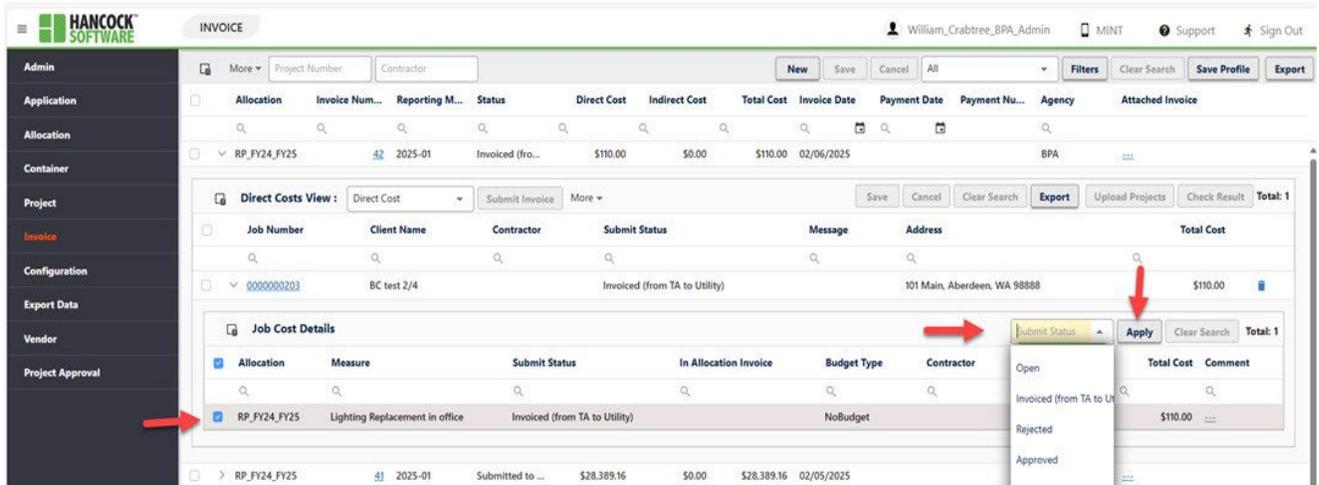
- After the trade ally submits the package/project to the utility, it is the utility's turn to review and process it.
 - From the **Invoice Sidebar** menu, the options vary depending on the user and their type (i.e. Invoice screens will be different for Trade Allies vs. Utilities).
 - Click on the **Invoice** bar, then click on the **Invoice Number**.



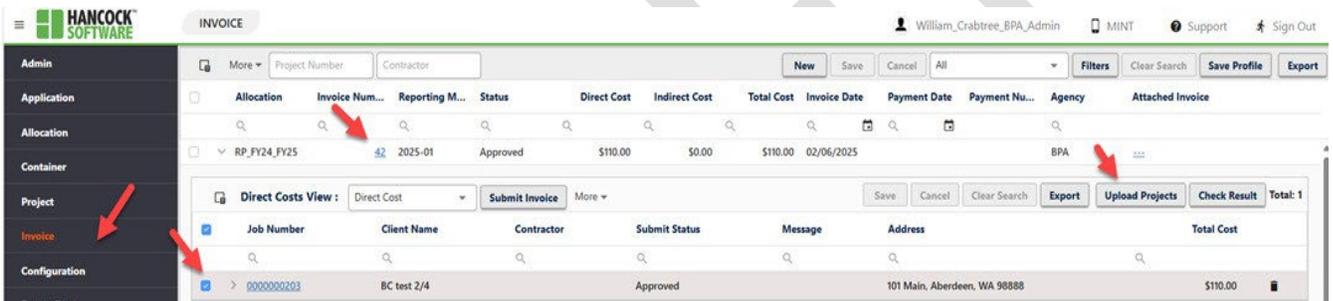
- With the **Direct Costs View** screen open, check the box next to the job number and click on the **arrow** (caret) to get to **Job Cost Details**.



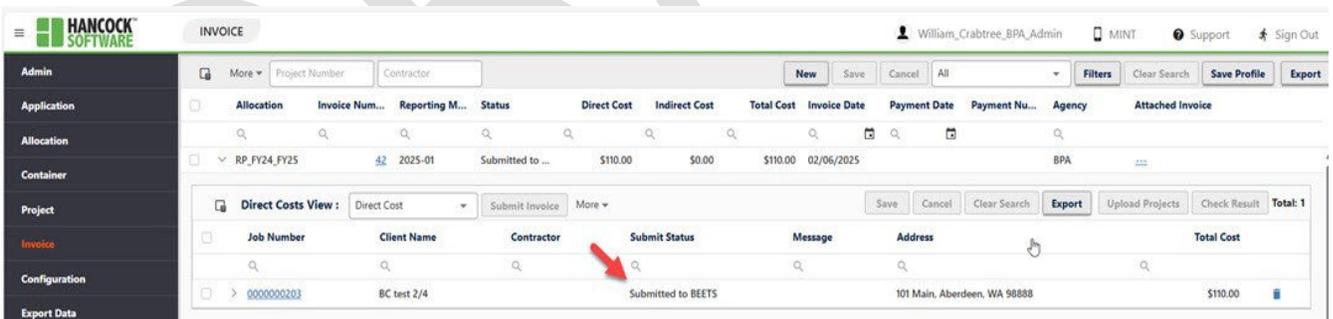
- Select the **Job** with the checkbox in the **Job Cost Details** section, go to the **Submit Status** (drop down menu) box and select **Approved**, then click the **Apply** button.



- Return to the **Invoice** side menu area, then double-click on the **Invoice Number**,
 - Click the **checkbox** next to the **Job Number** and click on the **Upload Projects** button. This will change the status and confirm it was uploaded.



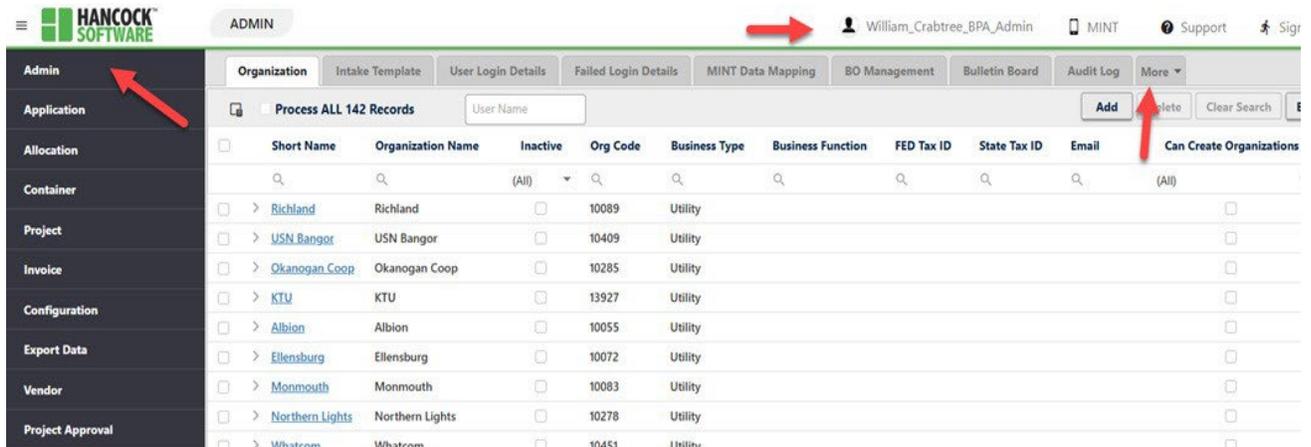
- You will note the **Submit** status has been changed to **Submitted to BEETS**.



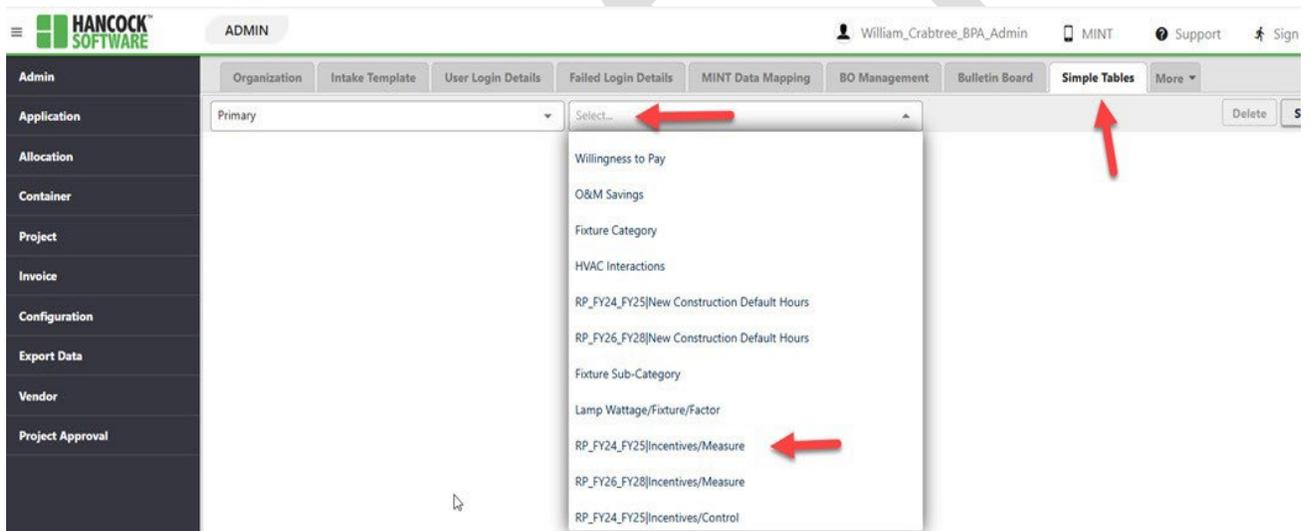
Congratulations! Your Project has been submitted to BEETS!

Utility Incentive Cost Adjustments

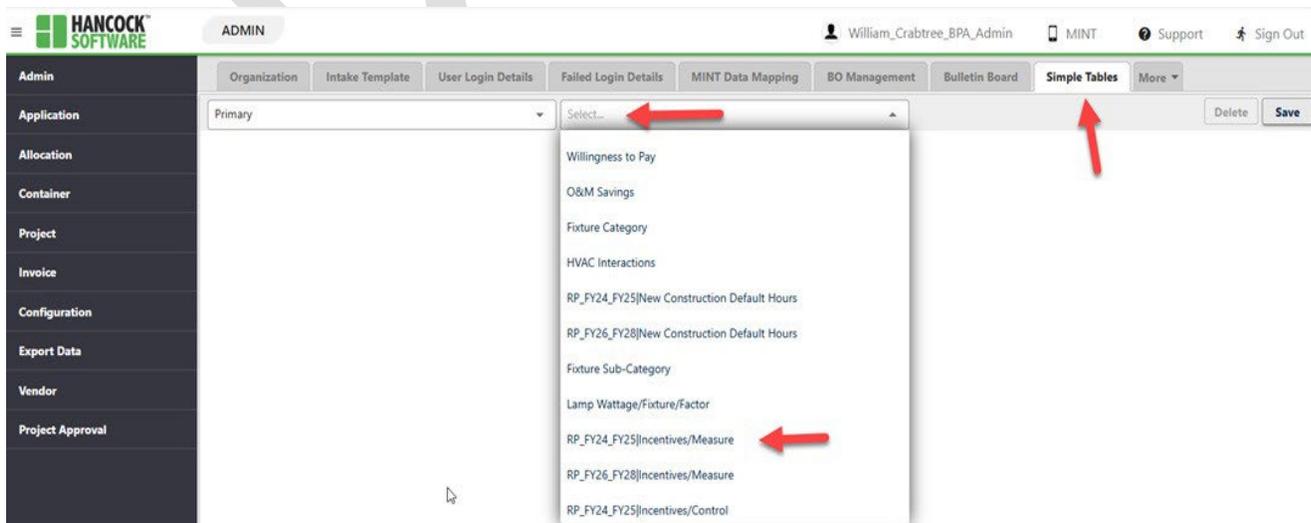
- To review and edit Utility's incentive costs, log into the Hancock Cloud as a utility admin and click the **More** button.



- Click on **Simple Tables**, select to see the tables available, then click on the **Rate Period** desired.

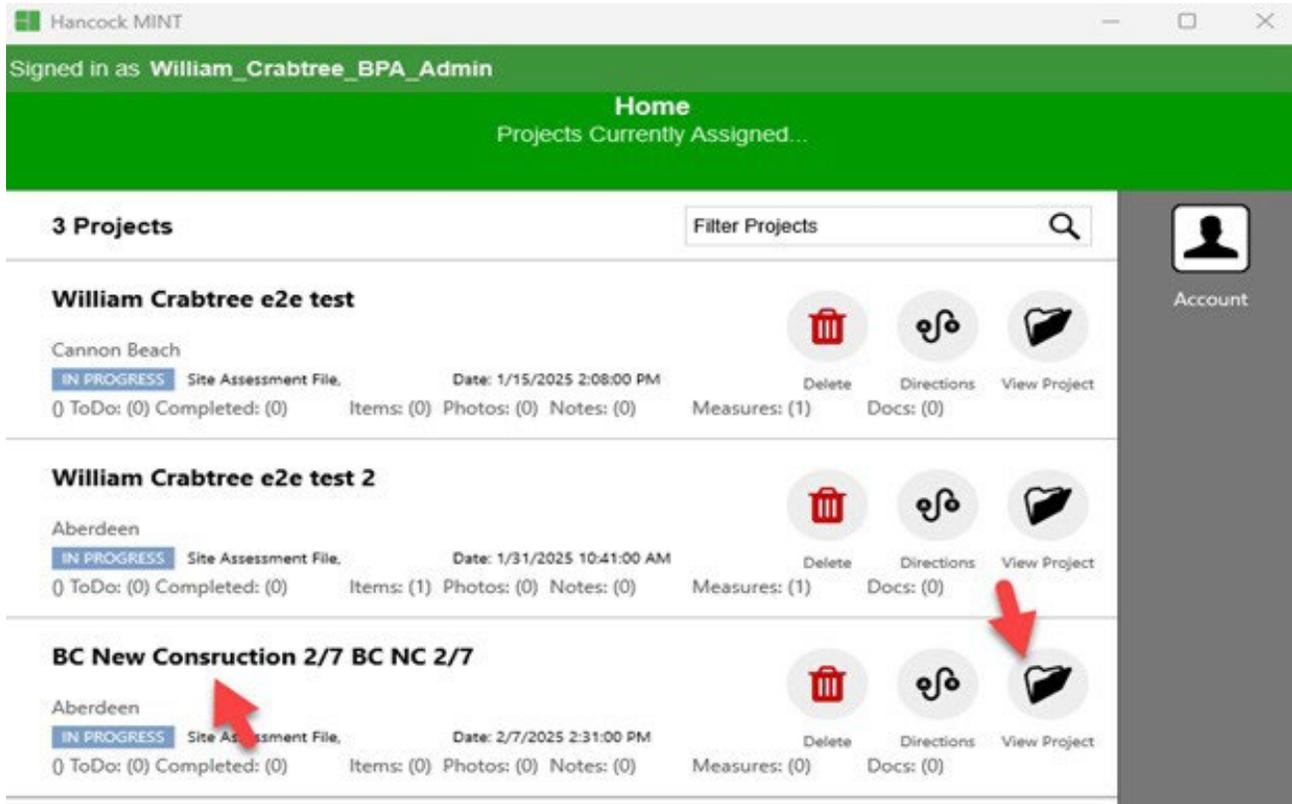


- The utility administrator is able to adjust the **Utility Incentive** amounts in the Utility Incentive column.
 - Note: utility incentives may be equal to or less than the standard (BPA) incentive.

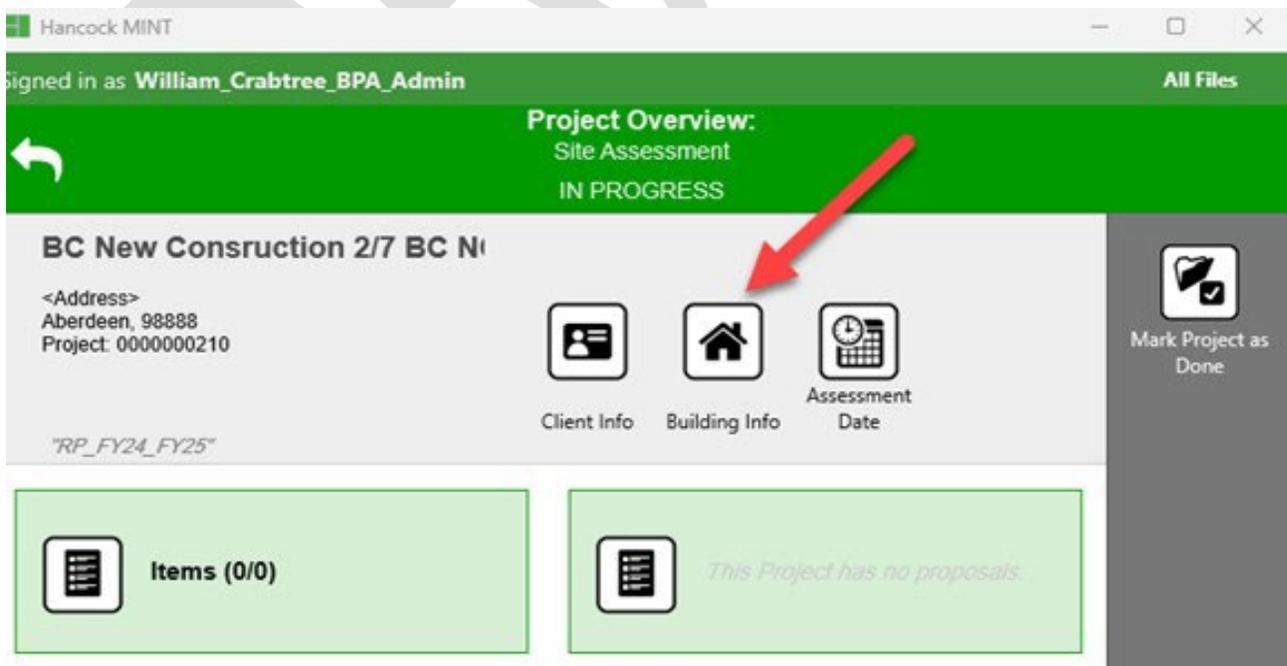


New Construction in MINT

- Enter the project in Hancock Cloud as described above and sync with MINT.
 - Click the **View Project** button in MINT.
 - Note: using the customer name or project name to ID the project as new construction is very helpful in identifying the project in MINT.



- Click on the **Building Info** button and start the entries to make it a **New Construction Project**.



- Selecting “yes” to any of the **Baseline Eligibility** questions will make the project New Construction.

The screenshot shows the Hancock MINT 'Building Info' form. The title bar indicates 'BC New Construction 2/7 BC NC 2/7'. The 'Baseline Eligibility' section contains four questions, each with a dropdown menu. Red arrows point to the 'Yes' selection for the first question and the 'New Construction' result at the bottom. Buttons for 'Saved Notes...', 'Save Last Note', and 'New Note' are visible above the input fields.

Question	Selected Answer
Is the facility or exterior lighting system newly constructed?	Yes
Is the facility a newly constructed addition to an existing facility?	No
Is there a change in the occupancy type as part of the lighting project?	No
Is the project a major renovation for reasons other than lighting?	No
Based on your responses the project is defined as:	New Construction

- When all required info is entered (Note: red box and red asterisks indicate required items), MINT will do its calculations.

The screenshot shows the Hancock MINT 'Building Info' form with calculated results. A 'MINT Calcs' logo is present. Red arrows point to the 'Exterior-Incentive' and 'Exterior-Adjusted Savings (kWh)' fields. Buttons for 'Saved Notes...', 'Save Last Note', and 'New Note' are visible above the input fields.

Field	Value
Exterior-Power (Watts)	2500
Exterior-Affected Square Footage	1000
Exterior-Incentive	1577.46576
Exterior-Code Baseline (kWh)	21900
Exterior-Proposed (kWh)	10950
Exterior-Unadjusted Savings (kWh)	10950
Exterior-Savings %	50
Exterior-Adjusted Savings (kWh)	12134.352

Administrative Account Functions

- Adding Users by Administrators. Only users with administrative rights can add others to their respective utility or trade ally. To add a user to your organization, log in with the administrative username and password. Then, click on the Admin Bar, locate the appropriate organization Name and click the Short Name.

The screenshot shows the Hancock Software Admin interface. The top navigation bar includes the Hancock Software logo, the user name 'William_Crabtree_BPA_Admin', and various utility icons. The main menu on the left has 'Admin' highlighted in red. The main content area shows a table of organizations with columns: Short Name, Organization Name, Inactive, Org Code, Business Type, Business Function, FED Tax ID, State Tax ID, Email, and Can Create Organizations. The 'BPA' organization is selected, and its details are shown below. The 'Users' table is also visible, showing one user: W_Crabtree_BPA_User.

Short Name	Organization Name	Inactive	Org Code	Business Type	Business Function	FED Tax ID	State Tax ID	Email	Can Create Organizations
BPA Child	BPA Child	<input type="checkbox"/>	12345	Utility					<input type="checkbox"/>
Bonneville Expedition	Bonneville Expedition	<input type="checkbox"/>	90210						<input type="checkbox"/>
BPA	Bonneville Power Administration	<input type="checkbox"/>	13738						<input checked="" type="checkbox"/>

Role Name	Role Description
BPA User	Same as BPA Admin role, but can't change budget
BPA Admin	BPA Administrator for Weatherization, with access to all low income workflow and configuration screens
Trade Ally User	Basic user privileges, ability to view user projects regardless of utility association
Utility View Only	Same as Utility User role, but can't edit
Trade Ally Manager	Trade ally Manager for Weatherization, with access to admin screens

Login Name	Full Name	External User ID	Address	Zip	City	State	Email	Phone1	User Role	Active
W_Crabtree_BPA_User	W_Crabtree_BPA_User			97201	United States		wecrabtree@bpa.gov	5032303279	BPA User	Yes

The screenshot shows the Hancock Software Admin interface. The top navigation bar includes the Hancock Software logo, the user name 'William_Crabtree_BPA_Admin', and various utility icons. The main menu on the left has 'Admin' highlighted in red. The main content area shows a table of organizations with columns: Short Name, Organization Name, Inactive, Org Code, Business Type, Business Function, FED Tax ID, State Tax ID, Email, Can Create Organizations, and Allowed. The 'Lakewood' organization is selected, and its details are shown below. The 'Users' table is also visible, showing two users: W_Crabtree_BPA_User and Brice_Lang_BPA_USER.

Short Name	Organization Name	Inactive	Org Code	Business Type	Business Function	FED Tax ID	State Tax ID	Email	Can Create Organizations	Allowed
Farmers	Farmers	<input type="checkbox"/>	10174	Utility					<input type="checkbox"/>	
Surprise Valley	Surprise Valley	<input type="checkbox"/>	10369	Utility					<input type="checkbox"/>	
Nespelem	Nespelem	<input type="checkbox"/>	10273	Utility					<input type="checkbox"/>	
Lakewood	Lakewood	<input type="checkbox"/>	10235	Utility					<input type="checkbox"/>	
Bonneville Power Administration	Bonneville Power Administration	<input type="checkbox"/>	13738						<input checked="" type="checkbox"/>	

Role Name	Role Description
BPA User	Same as BPA Admin role, but can't change budget
BPA Admin	BPA Administrator for Weatherization, with access to all low income workflow and configuration screens
Trade Ally User	Basic user privileges, ability to view user projects regardless of utility association
Utility View Only	Same as Utility User role, but can't edit
Trade Ally Admin	Trade ally Manager for Weatherization, with access to all non-admin screens

Login Name	Full Name	External User ID	Address	Zip	City	State	Email	Phone1	User Role	Active	User ID
W_Crabtree_BPA_User	W_Crabtree_BPA_User			97201	United States		wecrabtree@bpa.gov	5032303279	BPA User	Yes	38e13fb5-a99e-4f19-8
Brice_Lang_BPA_USER	Brice Lang						blang@bpa.gov		BPA User	Yes	tb0c9cb2-af0b-41a6-4

- Click the **Add** button, you will see the ADD/Edit Organization User screen (which has been completed and ready to save below). Note: all the fields with the red asterisk are required. The Field Role is also required in order to move projects between Hancock Cloud and MINT. Click **Save** and the new person has been added. The only Program Template is “Primary.”

Add/Edit Organization User x

Authentication Type* Sql Authentication	Password*
Login Name* Bill_C_BPA_User	Required Reset Password <input type="checkbox"/>
Full Name* Bill E Crabtree	Inactive <input type="checkbox"/>
Phone	Unlock User <input checked="" type="checkbox"/>
Address	Email* wecrabtree@bpa.gov
City	ZIP
BPI Number	State
User Role* BPA User	BPI Expiration Date <input type="text"/>
Program Templates* Primary	Field Role Auditor

Save **Cancel**



Leave as Sql



Required!



Miscellaneous Tips

- The Hancock Cloud has a quick link to resources in the bottom left of the screen called Release Notes. Click it to activate, you will see the direct connection to the Commercial Lighting page on bpa.gov.

The screenshot shows the Hancock Software Admin interface. At the top, there is a navigation bar with the Hancock Software logo, the word 'ADMIN', and user information for William_Crabtree_BPA_Admin. Below this is a sub-navigation bar with tabs for Organization, Intake Template, User Login Details, Failed Login Details, MINT Data Mapping, BO Management, Bulletin Board, Audit Log, and More. The main content area displays a table of organizations with columns for Short Name, Organization Name, Inactive, Org Code, Business Type, Business Function, FED Tax ID, State Tax ID, Email, and Can Create Organizations. The table lists 142 records, with the first few rows showing organizations like Richland, USN Bangor, Okanogan Coop, KTU, Albion, Ellensburg, Monmouth, Northern Lights, Whatcom, UEC, Mason 1, Bonners Ferry, DOE-RL, Missoula, Minidoka, Big Bend, Tillamook, and Idaho Falls Power. A red arrow points to the bottom left corner of the table area, specifically to the pagination controls.

Short Name	Organization Name	Inactive	Org Code	Business Type	Business Function	FED Tax ID	State Tax ID	Email	Can Create Organizations
> Richland	Richland	<input type="checkbox"/>	10089	Utility					<input type="checkbox"/>
> USN Bangor	USN Bangor	<input type="checkbox"/>	10409	Utility					<input type="checkbox"/>
> Okanogan Coop	Okanogan Coop	<input type="checkbox"/>	10285	Utility					<input type="checkbox"/>
> KTU	KTU	<input type="checkbox"/>	13927	Utility					<input type="checkbox"/>
> Albion	Albion	<input type="checkbox"/>	10055	Utility					<input type="checkbox"/>
> Ellensburg	Ellensburg	<input type="checkbox"/>	10072	Utility					<input type="checkbox"/>
> Monmouth	Monmouth	<input type="checkbox"/>	10083	Utility					<input type="checkbox"/>
> Northern Lights	Northern Lights	<input type="checkbox"/>	10278	Utility					<input type="checkbox"/>
> Whatcom	Whatcom	<input type="checkbox"/>	10451	Utility					<input type="checkbox"/>
> UEC	UEC	<input type="checkbox"/>	10388	Utility					<input type="checkbox"/>
> Mason 1	Mason 1	<input type="checkbox"/>	10246	Utility					<input type="checkbox"/>
> Bonners Ferry	Bonners Ferry	<input type="checkbox"/>	10062	Utility					<input type="checkbox"/>
> DOE-RL	DOE-RL	<input type="checkbox"/>	10426	Utility					<input type="checkbox"/>
> Missoula	Missoula	<input type="checkbox"/>	10259	Utility					<input type="checkbox"/>
> Minidoka	Minidoka	<input type="checkbox"/>	10082	Utility					<input type="checkbox"/>
> Big Bend	Big Bend	<input type="checkbox"/>	10027	Utility					<input type="checkbox"/>
> Tillamook	Tillamook	<input type="checkbox"/>	10376	Utility					<input type="checkbox"/>
> Idaho Falls Power	Idaho Falls Power	<input type="checkbox"/>	10204	Utility					<input type="checkbox"/>

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Release Notes

For the LC Program Requirements and LC Program Offerings, please click the link below to go to the BPA Commercial Lighting website.

[Commercial Industrial Lighting](#)

OK