

## Ekotrope Helpful Tips

### Residential New Construction Program

#### What is a project submission ID?



The number/ letter combination that shows after a project is submitted.

#### How to search for projects



1. In search bar select “Project ID”,
2. Enter Ekotrope submission ID and hit enter.

#### How to export reports

1. Within the Ekotrope application select Reports > Projected,
2. Select the report(s) you are interested in reviewing (examples below) and select OK.

##### Utility Incentive Programs

- Duke NC 2012 HERO Performance Compliance
- Duke 2012 HERO Fuel Summary Comparison
- Duke 2012 HERO Proposed Home Summary
- Duke 2012 HERO Reference Home Summary
- Duke NC 2018 HERO Performance Compliance
- Duke 2018 HERO Fuel Summary Comparison
- Duke 2018 HERO Proposed Home Summary
- Duke 2018 HERO Reference Home Summary
- Duke Rebate Reference Home (Permitted after...)
- Duke NC (permitted before 1/1/19) Fuel Summ...
- Duke NC (permitted after 1/1/19) Fuel Summar...

3. If you are curious about what is specifically going into the model on a deep level – you can pull the below reports.



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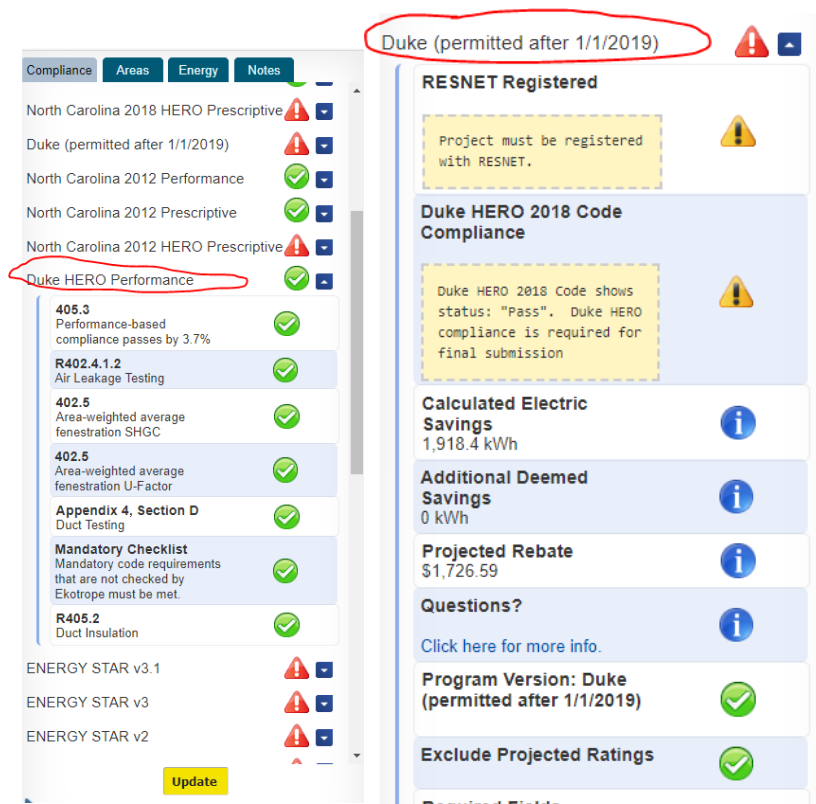
### Residential New Construction Program

#### Utility Incentive Programs

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#### Overview Quick Results pane

1. Open the Ekoptope Application Building Design (pencil and paper icon),
2. On the right-hand side of the screen is a Quick Results Pane,
3. Open Duke HERO Performance and review for compliance (image below)
4. Open Duke (permitted after 1/1/2019) and review for compliance (image below)
5. Errors with a red exclamation point  will not allow the project to be submitted.
6. Errors with a yellow exclamation point  are warnings but will not prevent you from submitting.



Duke Hero Performance

Duke (permitted after 1/1/2019)

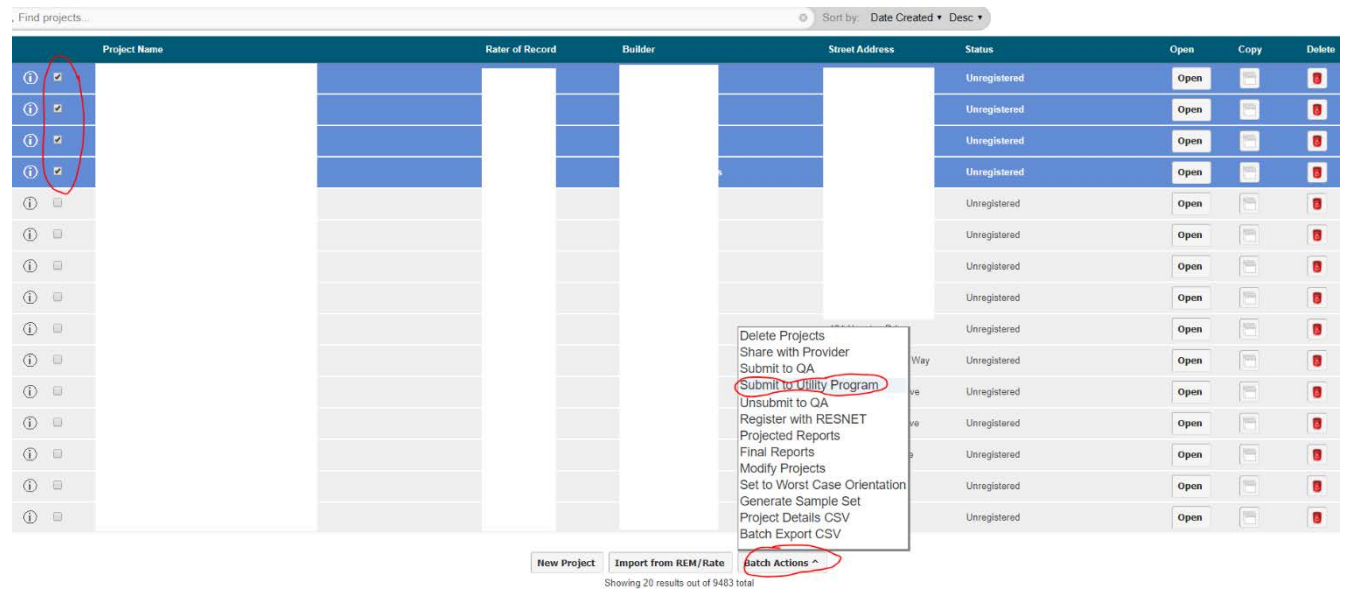
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#### How to batch submit

When multiple applications have information entered and are ready to submit to the Duke RNC HERO program.

1. Select the projects you want to batch submit,
2. Select “Batch Actions” at bottom of screen,
3. Select “Submit to Utility Program,”
4. Submit to Duke HERO Program.



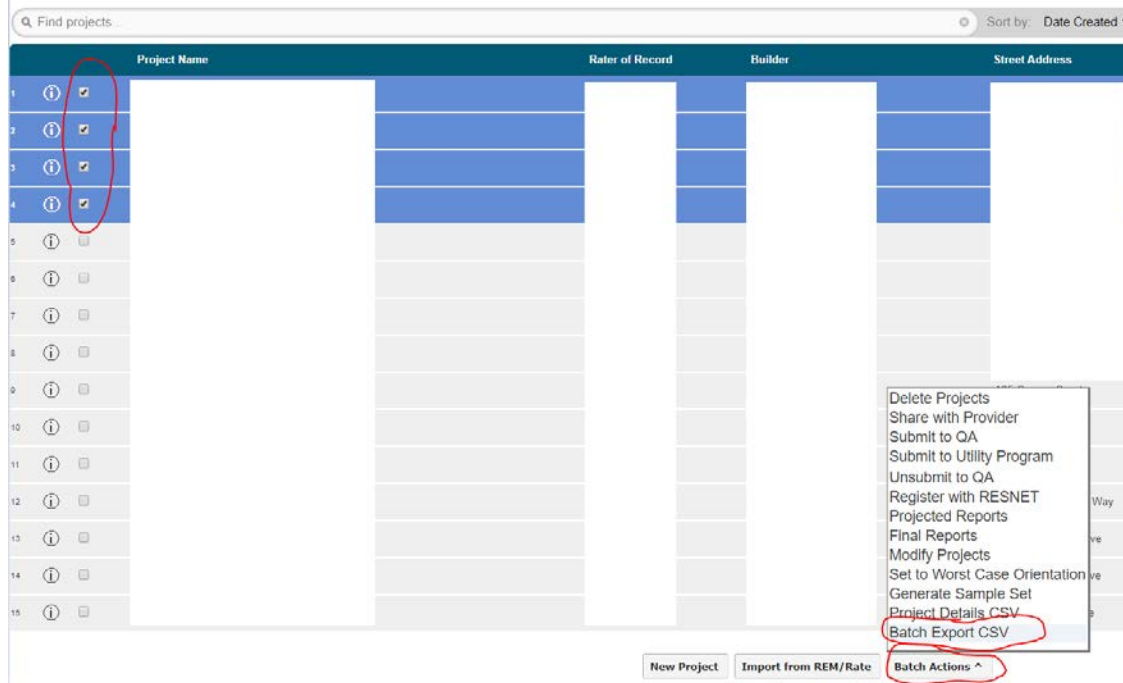
The screenshot displays a web application interface for managing projects. At the top, there is a search bar labeled 'Find projects' and a sort dropdown menu set to 'Date Created' in descending order. Below this is a table with columns: Project Name, Rater of Record, Builder, Street Address, Status, Open, Copy, and Delete. The first four rows of the table are highlighted in blue, and each has a checkmark icon in the first column, indicating they are selected. A context menu is open over the 'Batch Actions' button at the bottom of the table. The menu items are: Delete Projects, Share with Provider, Submit to QA, **Submit to Utility Program** (circled in red), Unsubmit to QA, Register with RESNET, Projected Reports, Final Reports, Modify Projects, Set to Worst Case Orientation, Generate Sample Set, Project Details CSV, and Batch Export CSV. The 'Batch Actions' button at the bottom of the table is also circled in red. At the bottom of the interface, there are buttons for 'New Project', 'Import from REM/Rate', and 'Batch Actions ^'. A status message at the bottom center reads 'Showing 20 results out of 9463 total'.

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#### How to batch export projects

1. Select the projects you want to batch export,
2. Select “Batch Actions” at bottom of screen,
3. Select “Batch Export CSV”,
4. You will receive an email with the data from Ekotrope.



#### How to update projects – if a quality check issue comes up and you are notified by ICF

1. Open the existing Ekotrope application for this project.
2. Make the changes to the Ekotrope app.
3. Open the Project Info tab > ICF > change the status to Final Submission > Save.
4. Submit Project to Duke RNC Program.
5. Email Chase and [DERNC@icf.com](mailto:DERNC@icf.com) to let us know you completed the required changes.