



SOUTHWESTERN PUBLIC SERVICE COMPANY
DBA
XCEL ENERGY INC.

2020 LOAD MANAGEMENT
STANDARD OFFER PROGRAM

USER GUIDE FOR PROJECT SPONSORS



Updated March 2020

TABLE OF CONTENTS

INTRODUCTION	1
NAVIGATION	2
REGISTRATION	4
Register as a New User	4
Edit User Account Information.....	5
SPONSOR PROFILE	6
Create New Sponsor Profile.....	6
Edit Sponsor Profile.....	7
SPONSOR DOCUMENTS	8
Upload Sponsor Documents	8
View/Download Sponsor Documents.....	8
Delete Sponsor Documents.....	9
SITE CONTACTS	10
Create New Site Contact.....	10
Edit Site Contact	11
Delete Site Contact	12
SITES	13
Add a New Site	13
Copy Site.....	16
Edit Site Information.....	17
Upload Site Documents	18
Submit Site.....	19

INTRODUCTION

The User Guide provides Project Sponsors in the Southwestern Public Service Company dba Xcel Energy Inc. (Xcel Energy) Load Management Standard Offer Programs with guidelines for registering as a new user, creating a sponsor profile, uploading documents, as well as creating and submitting sites. Specific screen shots and directions are given for the majority of form-types that will be seen within EnerTrek[®], the online database tracking system.

When working with Xcel Energy Load Management Standard Offer Program forms, a few principles should be observed:

- Unless specifically directed to use the browser's buttons, use the navigation buttons provided on the EnerTrek[®] forms.
- Avoid pressing a "submit" or "accept" button multiple times if your browser performance slows. This could result in multiple submissions of the same form.
- Review the entire form before proceeding to ensure that all of the information required has been provided. If your browser is inactive for more than 30 minutes, you will be automatically logged off and may need to reenter data. To avoid this, try to save your information regularly.
- If you plan to enter data in multiple online database programs, work with only one program at a time. Simultaneously opening multiple browsers may present problems, since information is temporarily stored on your computer about each session and could conflict with data from the other program.
- Although not necessary to successfully complete each form, fields should not be left blank. Enter "None" or "N/A" if the field does not apply.

* The items in ***bold italics*** are selection items/buttons as they are displayed on the screen.

The online data tracking system used for Load Management Standard Offer Programs is ***EnerTrek[®]***, developed specifically for the various Load Management Standard Offer Programs being implemented by utilities. Henceforth, the online data tracking system will be referred to as EnerTrek.

NAVIGATION

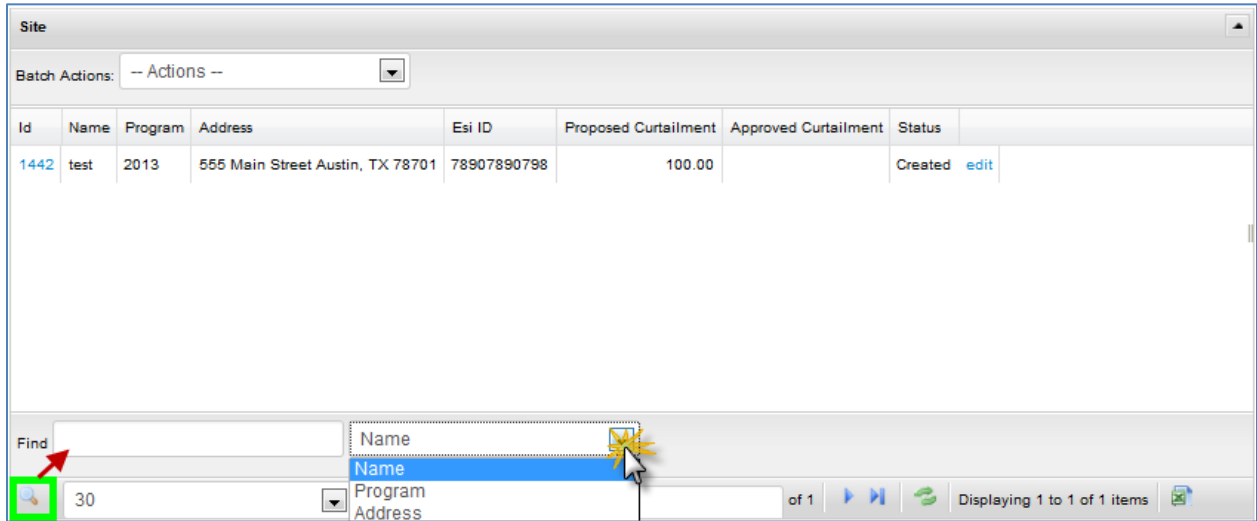
- Each table has filters that can be viewed by selecting the minus (“-“) sign next to the corresponding filter.
- Each table column can be sorted from ascending to descending order by selecting the column heading. Columns can also be moved to different positions in the table by dragging a column heading and dropping it in the table where you want it.
- Batch actions can be performed on several items at once using the Batch Actions dropdown menu.

The screenshot shows the 'Sites' interface. At the top, there is a 'Filters' section with two dropdown menus: 'Program: Active' and 'Status: -- Select --'. Below the filters is a 'Batch Actions' dropdown menu set to '-- Actions --'. The main table has the following columns: Id, Name, Program, Address, Esi ID, Proposed Curtailment, Approved Curtailment, Status, and edit. A single row is visible with the following data: Id: 1442, Name: test, Program: 2013, Address: 555 Main Street Austin, TX 78701, Esi ID: 78907890798, Proposed Curtailment: 100.00, Status: Created, and an edit link.

- Once batch action has been selected, select the checkbox next to projects for which you want the batch action to affect and select the corresponding action button.

The screenshot shows the 'Notices' interface with the sub-section 'Unsubmitted Sites'. The 'Batch Actions' dropdown is set to 'Submit', and a blue 'Submit' button is visible. The table has the following columns: Id, Sponsor, Name, Program, Address, Esi ID, Avg Peak kW, Proposed Curtailment, Approver, Status, and edit. A single row is visible with the following data: Id: 1442, Sponsor: Frontier Associates, Name: test, Program: 2013, Address: 555 Main Street Austin, TX 78701, Esi ID: 78907890798, Avg Peak kW: 2,000, Proposed Curtailment: 100, Status: Created, and an edit link. At the bottom, there is a pagination bar showing 'Page 1 of 1' and 'Displaying 1 to 1 of 1 items'. A 'Submit all Sites' button is also present at the bottom right.

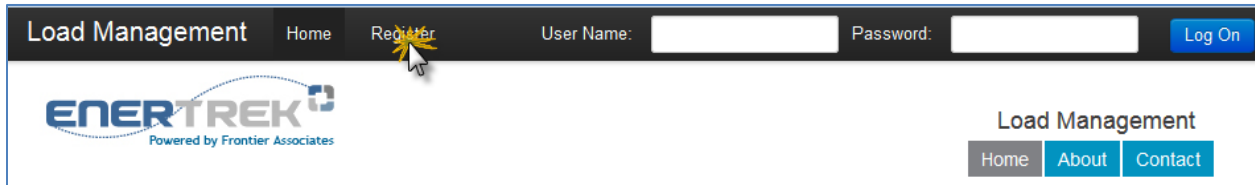
- The bottom of system tables offer a search function, page navigation, refresh button and Export to Excel function.



REGISTRATION

Register as a New User

- Select the **Register** link at the menu at the top of the Home page to create a new user account.

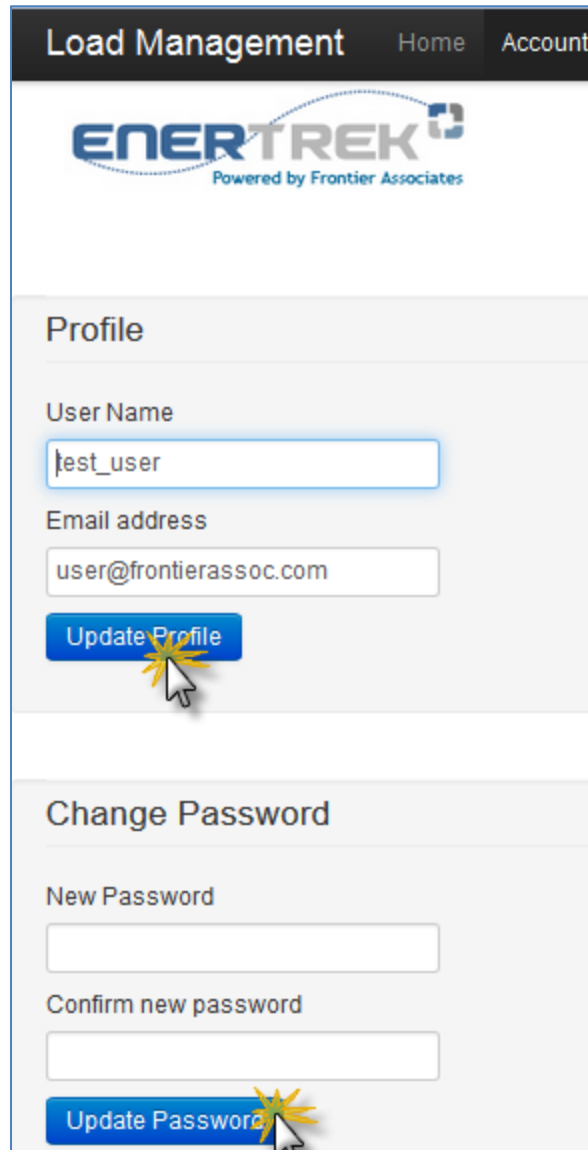


- Fill in appropriate text fields and select the **Register** button.

A screenshot of the 'Create a New Account' registration form. The form has a white background and a blue border. At the top, it says 'Create a New Account' in large bold letters, followed by the instruction 'Use the form below to create a new account.' and a note 'Passwords are required to be a minimum of 6 characters in length.' Below this is the section header 'Account Information'. There are three text input fields: 'Email address', 'Password', and 'Confirm password'. Each field is highlighted with a thick green border. At the bottom left of the form is a 'Register' button, which is highlighted with a yellow starburst and a mouse cursor.

Edit User Account Information

- Select the **Account** link at the menu at the top of the page.
- Make changes to the appropriate user information fields.
- Select the corresponding **Update** button.



The screenshot displays the 'Load Management' web application interface. At the top, a navigation bar includes 'Home' and 'Account' links. The EnerTrek logo, 'Powered by Frontier Associates', is centered below the navigation. The main content area is divided into two sections: 'Profile' and 'Change Password'. The 'Profile' section contains input fields for 'User Name' (containing 'test_user') and 'Email address' (containing 'user@frontierassoc.com'), followed by a blue 'Update Profile' button with a mouse cursor hovering over it. The 'Change Password' section contains input fields for 'New Password' and 'Confirm new password', followed by a blue 'Update Password' button with a mouse cursor hovering over it.

SPONSOR PROFILE

Create New Sponsor Profile

- Select the *Click here to create your profile* button.

Welcome

Welcome to our Load Management Demand Response Program!

Before you can apply to be a part of the program you must first create your profile. Once your profile is complete, you can begin to submit sites for approval.

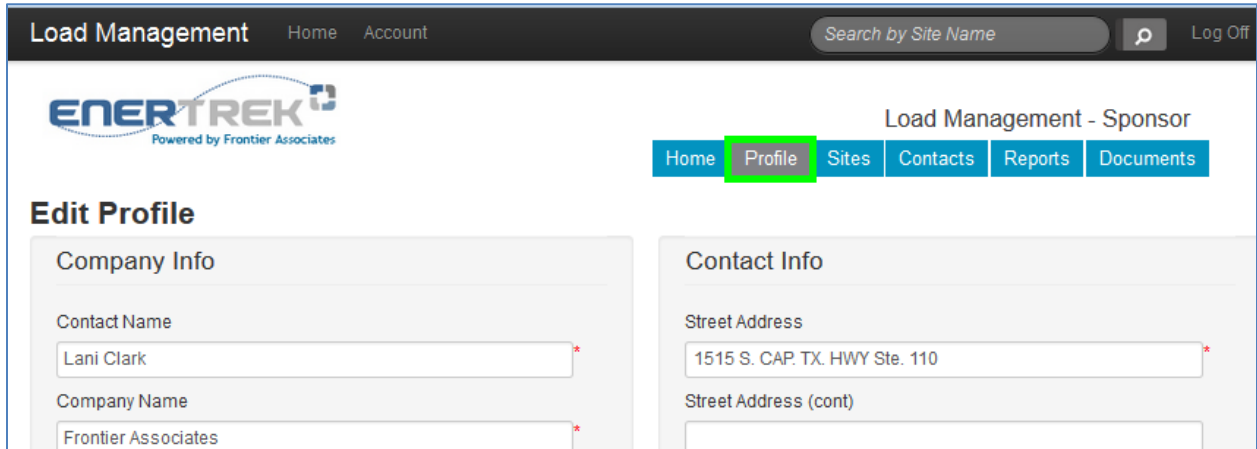
[Click here to create your profile](#)

- Fill in appropriate information and select the *Create* button.

Company Info	Contact Info
Contact Name <input type="text"/>	Street Address <input type="text"/>
Company Name <input type="text"/>	Street Address (cont) <input type="text"/>
TaxID <input type="text"/>	City <input type="text"/>
	State <input type="text" value="State"/>
	Zip <input type="text"/>
Please Choose All That Apply: Minority Owned <input type="checkbox"/> Woman Owned <input type="checkbox"/> Veteran Owned <input type="checkbox"/>	Phone : <input type="text"/> - <input type="text"/> - <input type="text"/> x. <input type="text"/>
Management Plan <input type="text"/>	Cell : <input type="text"/> - <input type="text"/> - <input type="text"/> x. <input type="text"/>
Business Description <input type="text"/>	Fax : <input type="text"/> - <input type="text"/> - <input type="text"/> x. <input type="text"/>
	Email <input type="text"/>
Create	

Edit Sponsor Profile

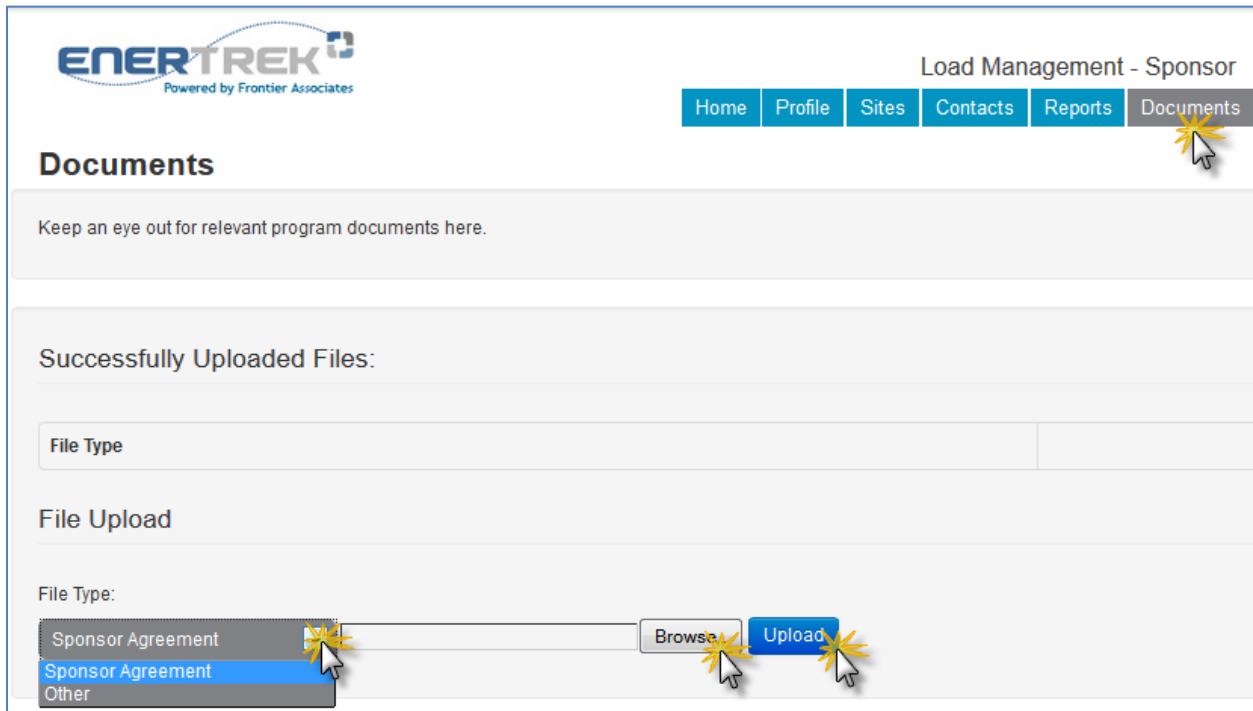
- Select the **Profile** button at the menu at the top of the page.
- Make necessary edits to your sponsor information.
- Select the **Save** button at bottom left corner of the page.



SPONSOR DOCUMENTS

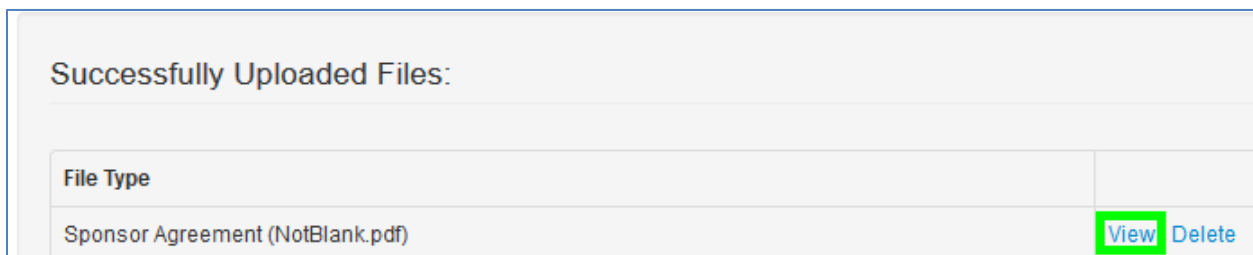
Upload Sponsor Documents

- Select the **Documents** button at menu at the top of page.
- Select the appropriate document type from document dropdown menu titled “File Type:”
- Select the **Browse** button to select a document from your local computer.
- Select the **Upload** button.

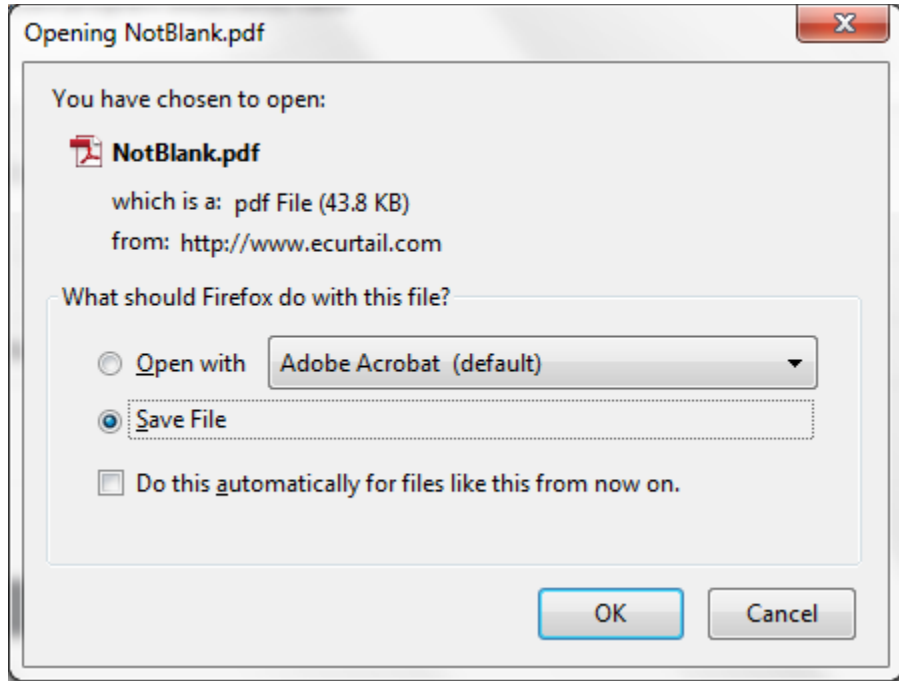


View/Download Sponsor Documents

- Select the **View** link next to appropriate document.

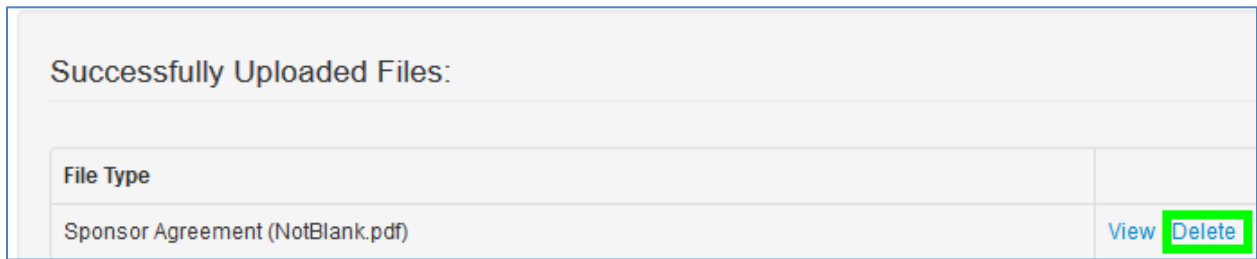


- Select the appropriate radio button and select the **OK** button.

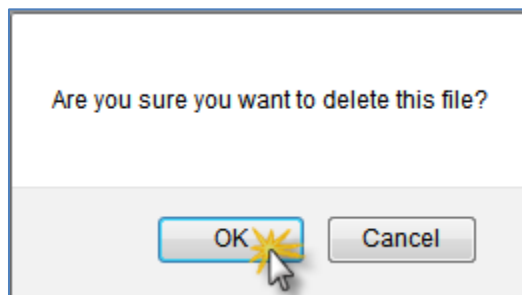


Delete Sponsor Documents

- Select the **Delete** link next to appropriate document.



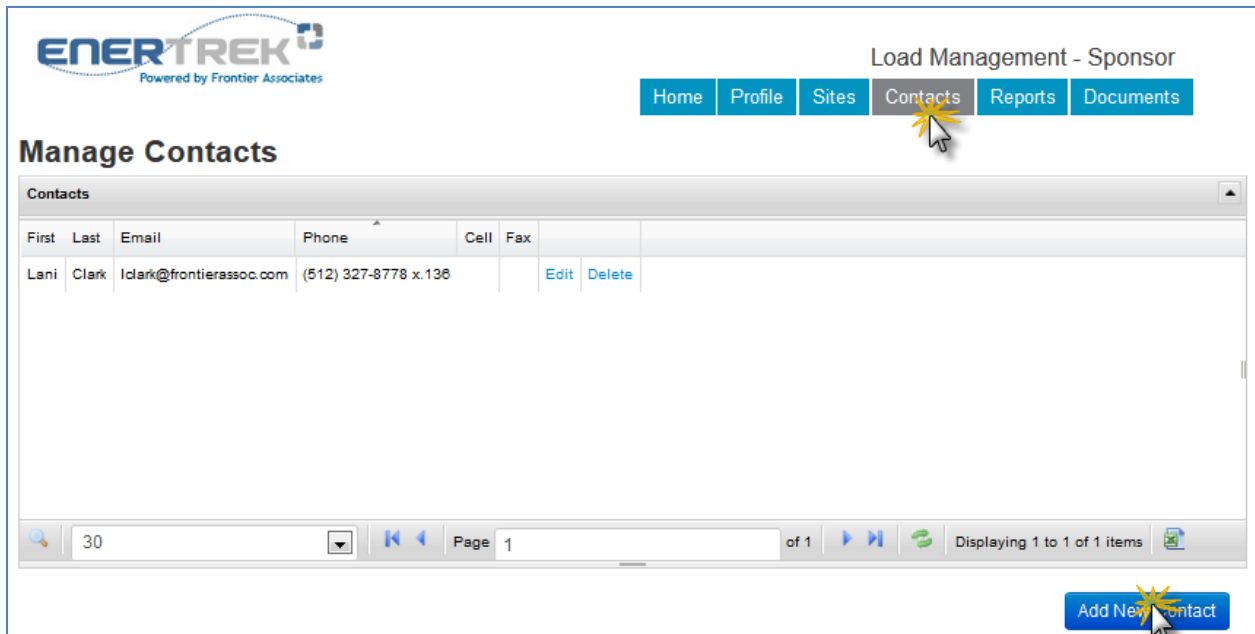
- Select the **OK** button in the pop-up window.



SITE CONTACTS

Create New Site Contact

- **PLEASE NOTE:** You will automatically be added as the first contact in your contact list.
- Select the *Contacts* button at menu at the top of page.
- Select the *Add New Contact* button at bottom right corner of page.



- Fill in appropriate information and select the *Add* button.

The screenshot shows a "Create Contact" modal form. It contains the following fields: "First Name" and "Last Name" (both required, indicated by an asterisk), "Phone" (format: [] - [] - [] x. []), "Cell" (format: [] - [] - [] x. []), "Fax" (format: [] - [] - [] x. []), and "Email" (required, indicated by an asterisk). At the bottom right of the form are "Add" and "Cancel" buttons. The "Add" button is highlighted with a yellow starburst and a mouse cursor.

Edit Site Contact

- Select the **Edit** button next to appropriate contact.

Manage Contacts							
Contacts							
First	Last	Email	Phone	Cell	Fax		
Lani	Clark	lclark@frontierassoc.com	(512) 327-8778 x.136			Edit	Delete
Test	Contact	lclark@frontierassoc.com	(512) 372-8778 x.136			Edit	Delete

- Edit appropriate fields and select the **Update** button.

Edit Contact

Contact

First Name: Last Name:

Phone : - - x.

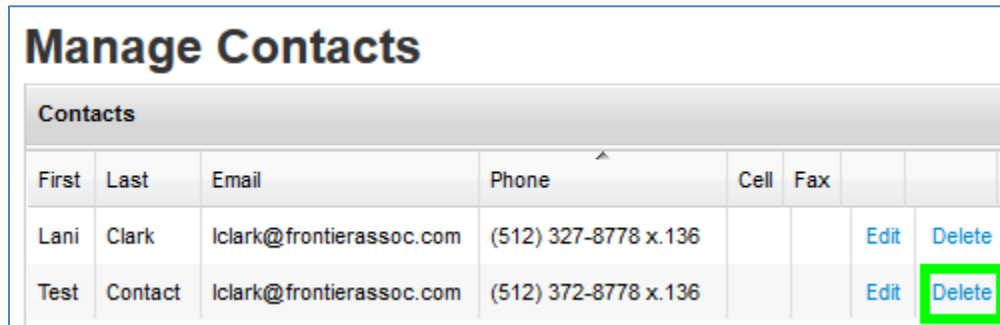
Cell : - - x.

Fax : - - x.

Email:

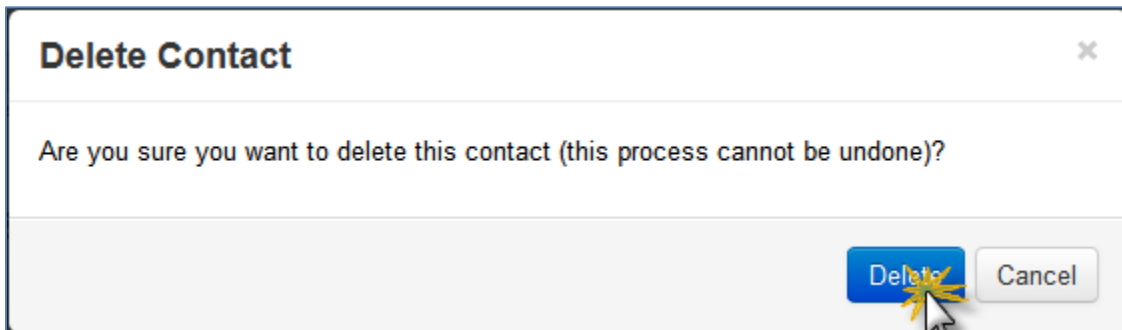
Delete Site Contact

- Select the **Delete** link next to appropriate contact.



Manage Contacts							
Contacts							
First	Last	Email	Phone	Cell	Fax		
Lani	Clark	lclark@frontierassoc.com	(512) 327-8778 x.136			Edit	Delete
Test	Contact	lclark@frontierassoc.com	(512) 372-8778 x.136			Edit	Delete

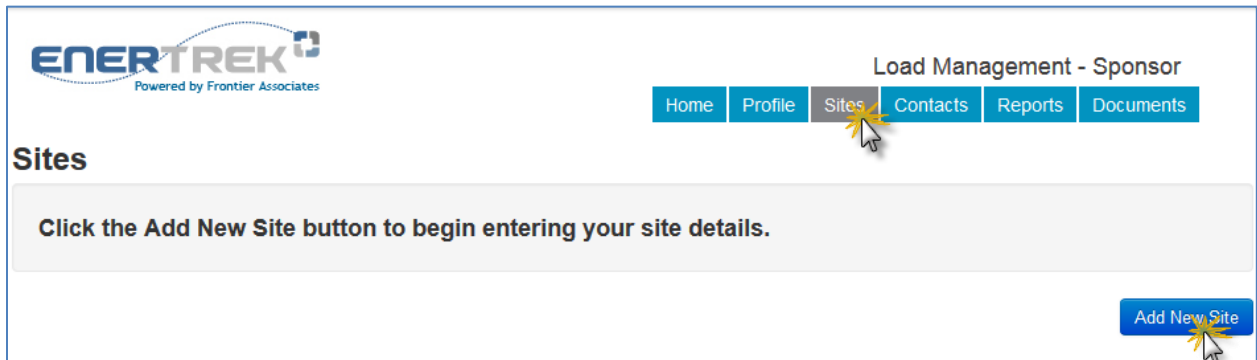
- Select the **Delete** button in the pop-up window.



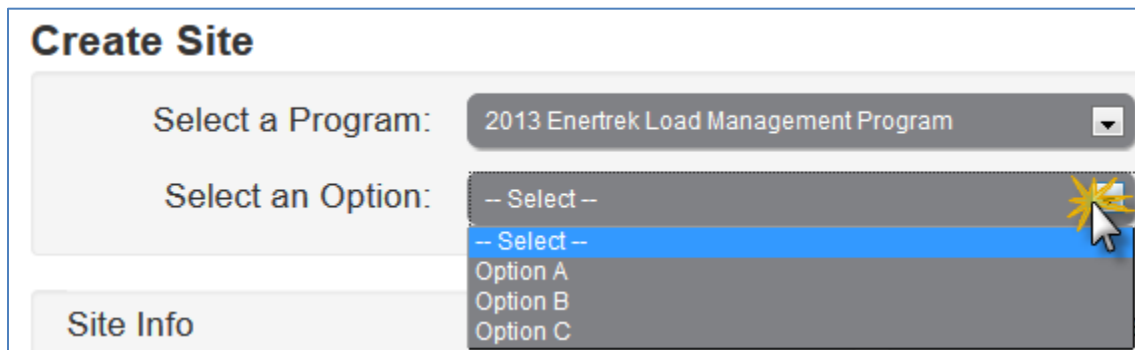
SITES

Add a New Site

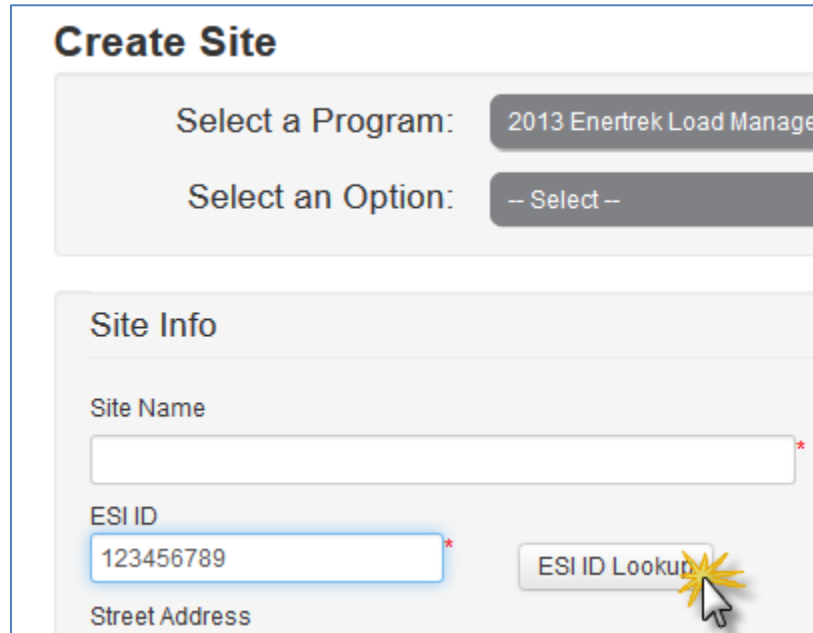
- Select the *Sites* button from the menu at the top of the page.
- Select the *Add New Site* button.



- Select a Curtailment Option from dropdown list (**where applicable**).



- Enter customer ESI-ID number into appropriate field and select the **ESI ID Lookup** button to prepopulate customer's address into appropriate fields.



Create Site

Select a Program: 2013 Enertrak Load Manager

Select an Option: -- Select --

Site Info

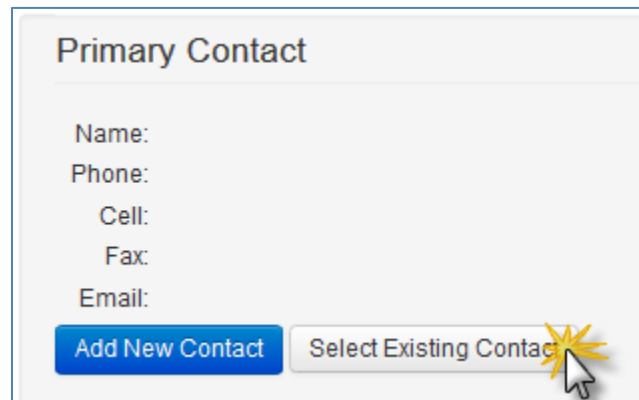
Site Name

ESI ID
123456789

Street Address

ESI ID Lookup

- Fill in appropriate site information into the rest of the form.
- Select the **Select Existing Contact** button to populate contact information for persons already in your Contact List.
- Select the **Add New Contact** to populate information for person(s) not yet in your Contact List (new contacts added to a site will be automatically added to your Contact List).



Primary Contact

Name:

Phone:

Cell:

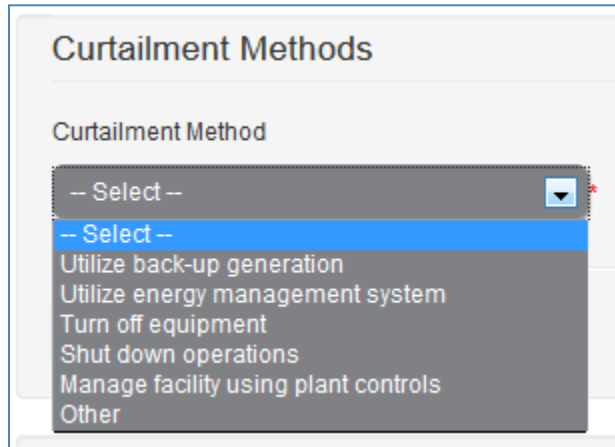
Fax:

Email:

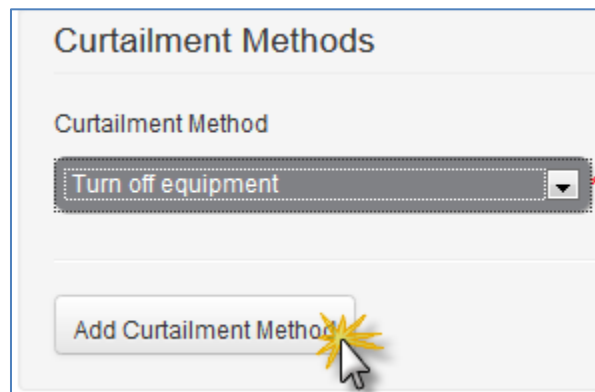
Add New Contact

Select Existing Contact

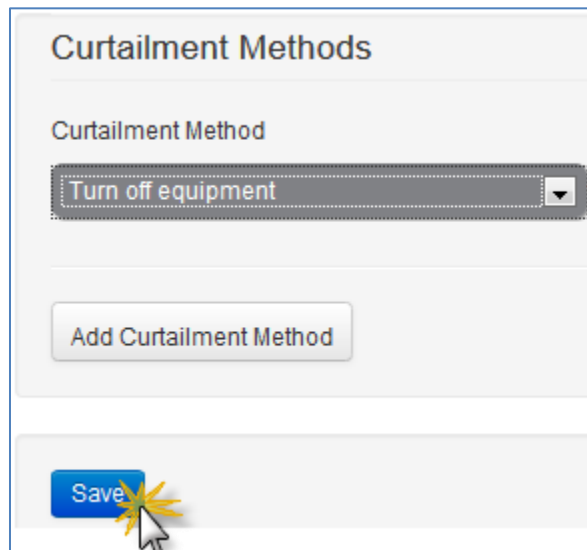
- Select the appropriate curtailment method(s) from the dropdown list at the bottom of the site form.



- Select the **Add Curtailment Method** button.

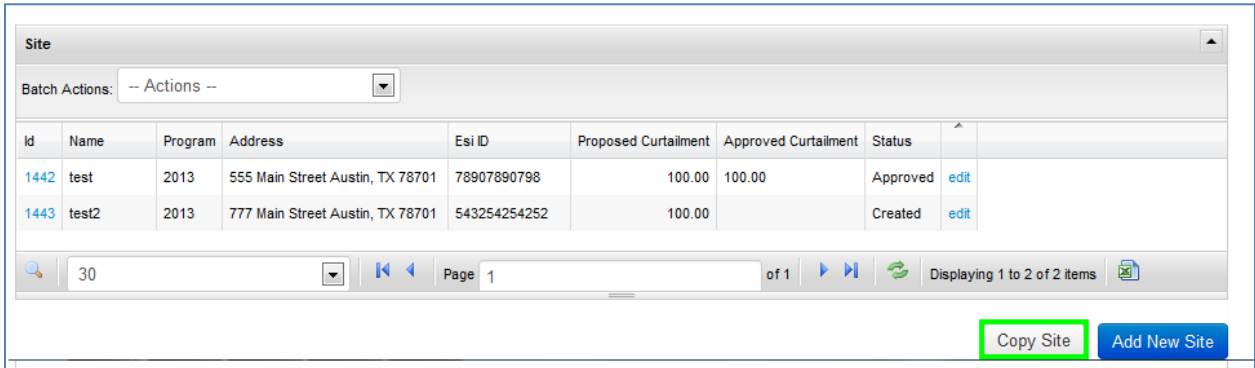


- Select the **Save** button to save site information.

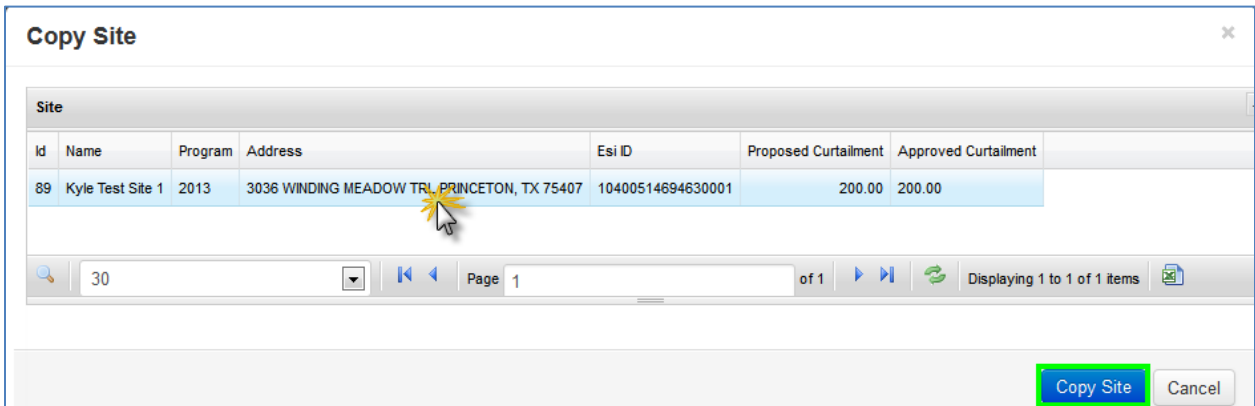


Copy Site

- Select the **Sites** button from the menu at the top of the page.
- Select the **Copy Site** button.



- Select appropriate site to copy from pop-up window (selected site will be highlighted in blue once selected).
- Select **Copy Site** button.



- Edit site information and select **Save** button.

Edit Site Information

- Select either the Site ID number link on the left side of the table OR select the edit link on the right side of the table next to the appropriate site.

Site								
Batch Actions: -- Actions --								
Id	Name	Program	Address	Esi ID	Proposed Curtailment	Approved Curtailment	Status	
1442	test	2013	555 Main Street Austin, TX 78701	78907890798	100.00		Created	edit

- Make appropriate changes and select the **Save** button at the bottom of the page.

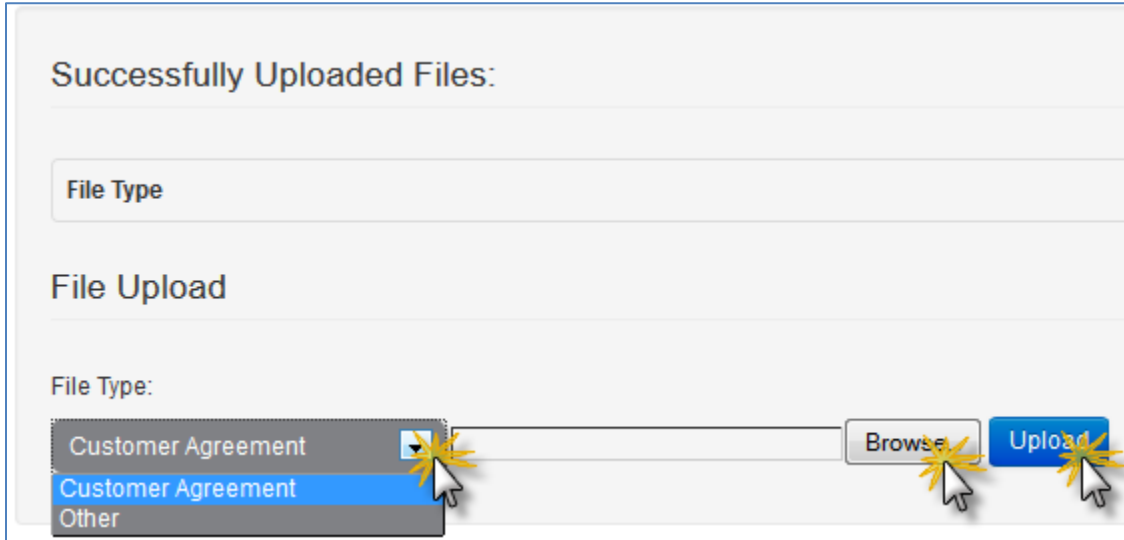
File Upload

File Type:

Customer Agreement

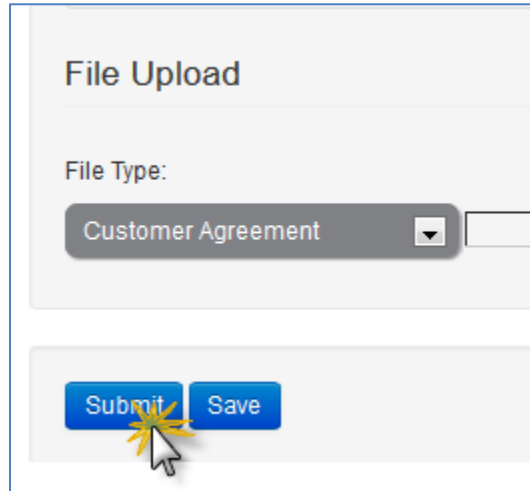
Upload Site Documents

- Follow the steps above to edit the appropriate site.
- Select the appropriate document type from the “File Type” dropdown menu.
- Select the **Browse** button and select the appropriate document from your local computer.
- Select the **Upload** button.



Submit Site

- Edit appropriate project (see instructions above).
- Select the **Submit** button at the bottom of the form.



- You can also submit sites in batches. To do so, select the “Batch Action” dropdown menu and select the **Submit** option.

Sites

[+] Filters

Site

Batch Actions: -- Actions --

Id	Name	Submit	Esi ID	Proposed Curtailment	Approved Curtailment	Status	
1442	test		555 Main Street Austin, TX 78701	78907890798	100.00	Created	edit
1443	test2		777 Main Street Austin, TX 78701	543254254252	100.00	Created	edit

The image shows a 'Sites' table with a 'Batch Actions' dropdown menu. The dropdown menu is open, showing a 'Submit' option highlighted in green. A mouse cursor is clicking on the 'Submit' option, which is highlighted with a yellow starburst effect.

- Select the checkboxes next to the sites you want to submit and select the **Submit** button.

Batch Actions: Submit

Submit

	Id	Name	Program	Address	Esi ID	Proposed Curtailment	Approved Curtailment	Status	
<input checked="" type="checkbox"/>	1442	test	2013	555 Main Street Austin, TX 78701	78907890798	100.00		Created	edit
<input checked="" type="checkbox"/>	1443	test2	2013	777 Main Street Austin, TX 78701	543254254252	100.00		Created	edit

The image shows the same 'Sites' table as above, but with checkboxes selected for the first two rows (1442 and 1443). The 'Batch Actions' dropdown menu is set to 'Submit'. A mouse cursor is clicking on the 'Submit' button, which is highlighted with a yellow starburst effect.