

# Grant eReporting Tutorial



# Training Slide Introduction

The following set of slides is intended to provide step-by-step instructions on the use of the DEDI eReporting web portal. The portal will allow:

1. Entry of metric and milestone reporting values
2. Upload of narrative reports or other programmatic electronic files

Note: Not everyone will use this reporting portal the same. As such, you may only use the portal for uploading documents and the metrics data entry may not apply to you.



# Web site link

**To enter programmatic reports updates, access the website**

**<http://energyreports.ky.gov>**



# Log on Screen



Energy and Environment Cabinet

Department for Energy Development and Independence

Grant Reporting System

This is the Department for Energy Development and Independence's grant reporting web page. Use this page for reporting all milestones, metrics, and program status reports for grant obligations. If you need assistance with this page, contact your project manager. For additional program and grant guidance see <http://energy.ky.gov/recovery/reporting/>

**Log In**

User Name:

Password:

Remember me next time.

[Forgot Password?](#)

**Enter User Name  
and Password**



# Change Password

Energy and Environment Cabinet - Windows Internet Explorer

http://epwebtest08.eppc.pri/EnergyGrantsReports/MemberPages/Projects.aspx

File Edit View Favorites Tools Help

McAfee SiteAdvisor

Energy and Environment Cabinet

Energy and Environment Cabinet

My Projects Help

Logged In As: rduff | Logout

### Projects

Contract	Grant	Project	Last Submitted	Next Submit	Draft
PON2 127 100000600	Energy Efficiency and Conservation Block Grant Program (EECBG)	<a href="#">Kentucky Department for Housing, Buildings and Construction - Training</a>		8/05/2009	

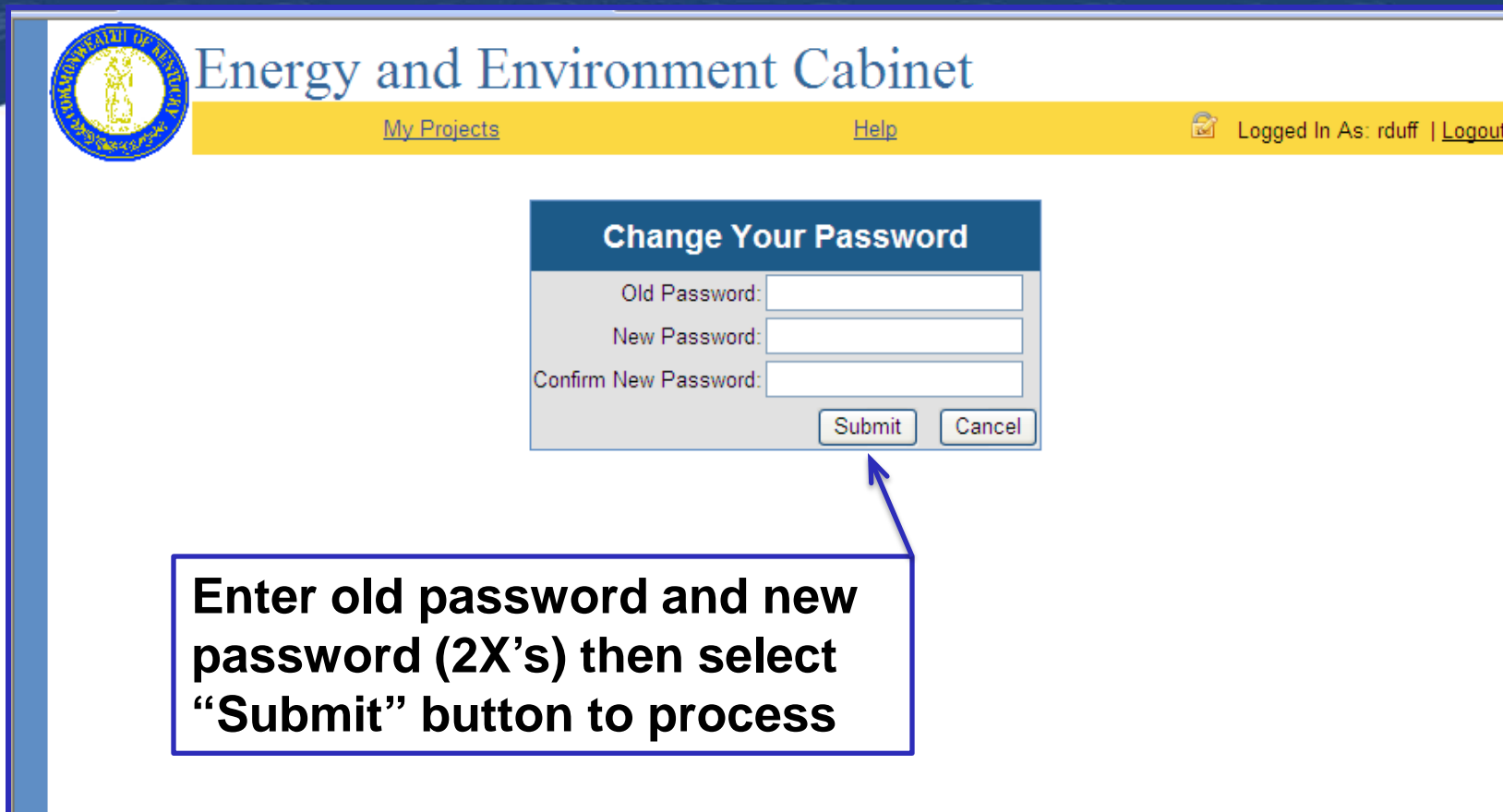
To change your password, select the padlock icon


Logged In As: rduff | Logout


ed	Next Submit	Draft
	8/05/2009	

Local intranet 100%

# Change Password



 Energy and Environment Cabinet

[My Projects](#) [Help](#)  Logged In As: rduff | [Logout](#)

### Change Your Password

Old Password:

New Password:

Confirm New Password:

**Enter old password and new password (2X's) then select "Submit" button to process**

# Project List



## Energy and Environment Cabinet

[My Projects](#)

[Help](#)

Log

### Projects

Contract	Grant	Project	Last Submitted	Next Submit	Draft
PON2 127 1000000600	Energy Efficiency and Conservation Block Grant Program (EECBG)	<a href="#">Kentucky Department for Housing, Buildings and Construction - Training</a>		8/05/2009	

To enter data, select  
the Project name in  
**BLUE**

Once populated, the screen will list all your projects, date when report was last submitted, date when the next report is due & status

# Data Entry

The screenshot shows a data entry interface with a table of required data fields, an 'Add New Document' section, and a 'Comments' section. Callouts provide instructions on how to use the form.

Required	Category	Question	Sector	Answer
*	Job Creation/Retention	Hours worked in reporting period for jobs retained	Industry	<input type="text"/> Hours
*	Job Creation/Retention	Hours worked in reporting period for jobs retained	Institutional	<input type="text"/> Hours
*	Job Creation/Retention	Hours worked in reporting period for jobs retained	Residential	<input type="text"/> Hours
*	Job Creation/Retention	Hours worked in reporting period for new jobs created	Commercial	<input type="text"/> Hours
*	Job Creation/Retention	Hours worked in reporting period for new jobs created	Industry	<input type="text"/> Hours
*	Job Creation/Retention	Hours worked in reporting period for new jobs created	Institutional	<input type="text"/> Hours
*	Job Creation/Retention	Hours worked in reporting period for new jobs created	Residential	<input type="text"/> Hours
*	Milestones - ALL	Prepare and submit annual reports		<input type="text"/>
*	Milestones - ALL	Prepare and submit final report		<input type="text"/> (1 planned)

**\* Indicates required data input; (Zero is an acceptable entry)**

**Use Scroll Bar to access all the required data fields**

**Add General Project comments**

**Add New Document**

File:  Browse...  
Type: - Select -  
Description: - Select -  
Budget  
Deliverables (Contract Products)  
Program Status Report (PSR)

**Documents**

No Documents Uploaded

Save Draft Cancel Submit





# Attach Documents

Save Draft Cancel Submit

Required	Category	Question	Sector	Answer
*	Job Creation/Retention	Description of jobs retained	Industry	
*	Job Creation/Retention	Description of jobs retained	Institutional	
		Description of jobs retained	Residential	
		Reporting period for jobs retained	Commercial	Hours
		Reporting period for jobs retained	Industry	Hours
*	Job Creation/Retention	Hours worked in reporting period for jobs retained	Institutional	Hours
*	Job Creation/Retention	Hours worked in reporting period for jobs retained	Residential	Hours
*	Job Creation/Retention	Hours worked in reporting period for new jobs created	Commercial	Hours
*	Job Creation/Retention	Hours worked in reporting period for new jobs created		Hours

**Step 3:**  
-Enter a brief description of what the file contains

**Step 4:**  
-Select the “Upload File” button to complete action

Add New Document

File:  Browse...

Type: - Select -

Description:

Upload File

Documents

No Documents Uploaded

Save Draft Cancel Submit

# Edit Attachments

Status Report for Kentucky Department for Housing, Buildings and Construction - Training  
 Reporting Period: July 2009 (Due Date: 8/5/2009 )  
 Created By: Robert Duff on 12/14/2009 1:16:00 PM

Save Draft Cancel Submit

Required	Category	Question	Sector	Answer
*	Job Creation/Retention	Hours worked in reporting period for new jobs created	Commercial	<input type="text"/> Hours
*	Job Creation/Retention	Hours worked in reporting period for new jobs created	Industry	<input type="text"/> Hours
*	Job Creation/Retention	Hours worked in reporting period for new jobs created	Institutional	84 <input type="text"/> Hours
*	Job Creation/Retention	Hours worked in reporting period for new jobs created	Residential	<input type="text"/> Hours
*	Job Creation/Retention	Total hours in standard work shift for re		
*	Milestones - ALL	Finalize program milestones, targets a		
*	Milestones - ALL	Hire program staff		
*	Milestones - ALL	Prepare and submit annual reports		
*	Milestones - ALL	Prepare and submit final report		
*	Milestones - ALL	Prepare and submit quarterly reports on project progress		1 <input type="text"/> (9 planned)
*	Milestones - ALL	Prepare and submit regular fiscal reports		<input type="text"/> (36 planned)
*	Milestones - KDHBCTRNG09	Conduct statewide marketing to promote training sessions		<input type="text"/> (1 planned)

**Attached files can be viewed, edited or deleted using the appropriate icon**

**Add New Document**

File:  Browse...

Type: - Select -

Description:

Upload File

Document	Type	Description	
74_Savings_and_Cost_Estimate_Summary.pdf	Budget	ROI- Payback	🔍 ✎ ✖

**Comments**



# Save Data

Save your work in progress, by using the “Save Draft” button at the top left or bottom left of the page.

**Note:** This does not “Submit” the report.

If you wish to discard all your work since the last save, select the “Cancel” button at the top right or bottom right of the page..

The screenshot shows a web application interface. At the top left, there is a 'Save Draft' button. Below it is a table with two columns: 'Required' and 'Category'. The table contains several rows with asterisks in the 'Required' column and text in the 'Category' column. At the bottom right, there is a 'Cancel' button and a 'Submit' button. A text box with a blue border and white background is overlaid on the interface, containing the text: 'If you wish to discard all your work since the last save, select the “Cancel” button at the top right or bottom right of the page..'. A blue arrow points from the text box to the 'Cancel' button. Another blue arrow points from the text box to the 'Save Draft' button at the top left. A third blue arrow points from the text box to the 'Save Draft' button at the bottom left.

Required	Category
*	Job Creation/Retention
*	Job Creation/Retention
*	Job Creation/Retention
*	Job Creation/Retention
*	Job Creation/Retention
*	Job Creation/Retention
*	Job Creation/Retention
*	Job Creation/Retention
*	Job Creation/Retention
*	Job Creation/Retention

# Review Report

**Before you can Submit report:**

**-Ensure all required (\*) fields have inputs**

**“Zero” is an acceptable input**

**-At least one attached document is required**

The screenshot shows a software interface for reviewing a report. At the top left, there is a 'Save Draft' button. Below it is a table with a 'Required' column. The table contains several rows, each with a yellow background and a red asterisk in the 'Required' column. The table has columns for 'Milestones - ALL', 'Description', and 'Hours'. The 'Hours' column contains input fields with values like 0, 1, 0, 0, 1, 0, 0, 1. To the right of the table is a 'Comments' section with a text area. At the bottom left, there is an 'Add New Document' section with fields for 'File', 'Type', and 'Description', and an 'Upload File' button. Below this is a table with columns 'Document', 'Type', and 'Description'. The table contains one row with the document name '74\_Savings\_and\_Cost\_Estimate\_Summary.pdf', type 'Budget', and description 'ROI- Payback'. At the bottom right, there are 'Cancel' and 'Submit' buttons.

Required	Milestones - ALL	Description	Hours	Planned
*	Job Cre			
*	Job Cre			
*	Job Cre			
*	Job Cre			
*	Milestones - ALL	Finalize program milestones, targets and metrics	0	(1 planned)
*	Milestones - ALL	Hire program staff	1	(1 planned)
*	Milestones - ALL	Prepare and submit annual reports	0	(3 planned)
*	Milestones - ALL	Prepare and submit final report	0	(1 planned)
*	Milestones - ALL	Prepare and submit quarterly reports on project progress	1	(9 planned)
*	Milestones - ALL	Prepare and submit regular fiscal reports	0	(36 planned)
*	Milestones - KDHBCTRNG09	Conduct statewide marketing to promote training sessions	0	(1 planned)
*	Milestones - KDHBCTRNG09	Conduct training workshops	1	(12 planned)

Document	Type	Description
74_Savings_and_Cost_Estimate_Summary.pdf	Budget	ROI- Payback



# Submit Report

## Step 1:

When you are ready to submit the report, use the “Submit” Button at the top right or bottom right of the page.

The screenshot displays a web application interface for submitting a report. At the top right, there are 'Cancel' and 'Submit' buttons. A blue arrow points to the 'Submit' button. Below this, a table lists various items with columns for 'Answer' and 'Hours'. The table includes rows for 'Job Creation/Retention' (450 Hours), several 'Milestones - ALL' entries (ranging from 1 to 36 planned hours), and 'Milestones - KDHBCTRNG09' (1 planned hour). A 'Windows Internet Explorer' pop-up box is overlaid on the table, containing a question mark icon and the text: 'Once this form is submitted you will no longer be able to make changes. Are you sure you want to submit?' with 'OK' and 'Cancel' buttons. A blue arrow points to the 'OK' button. At the bottom of the page, there is an 'Add New Document' section with fields for 'File', 'Type', and 'Description', and a table listing a document named '74\_Savings\_and\_Cost\_Estimate\_Summary.pdf' with a 'Budget' type and 'ROI- Payback' description. 'Save Draft', 'Cancel', and 'Submit' buttons are also present at the bottom.

## Step 2:

Confirm submission in the pop-up box



# Change Password



## Energy and Environment Cabinet

[My Projects](#)

[Help](#)



Logged In As: rduff | [Logout](#)

### Projects

Contract	Grant	Project	Last Submitted	Next Submit	Draft
PON2 127 1000000600	Energy Efficiency and Conservation Block Grant Program (EECBG)	<a href="#">Kentucky Department for Housing, Buildings and Construction - Training</a>	12/16/2009 9:54:00 AM	9/05/2009	

**Successful submission will show new “Last Submitted” date & time and automatically update next report due date**



# Data Review

**Problem:** *Is there a way to review what milestones have already been submitted.*

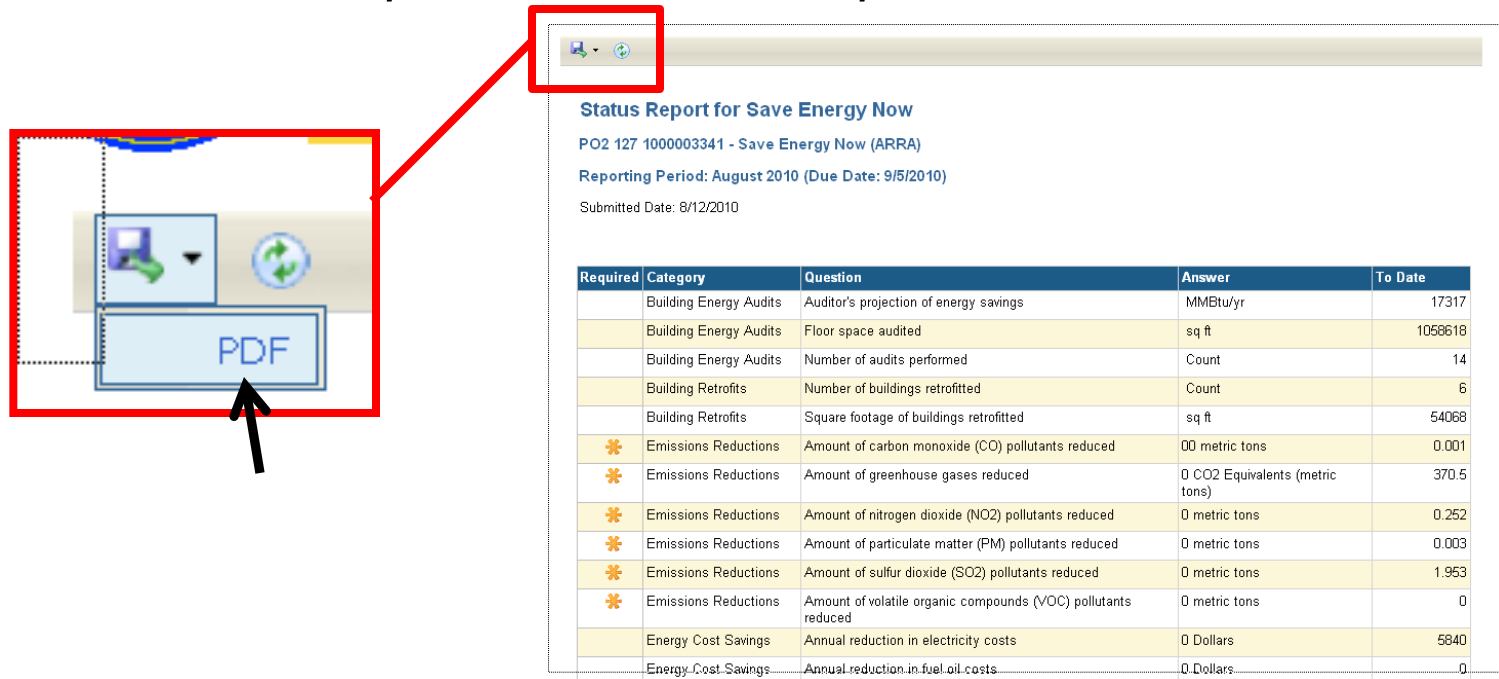
Required	Category	Question	Sector	Answer	To Date
*	Milestones - ALL	Draft and execute MOA		<input type="text"/> (1 planned)	5
*	Milestones - ALL	Finalize program milestones, targets and metrics		<input type="text"/> (1 planned)	5
*	Milestones - ALL	Prepare and submit annual reports		<input type="text"/> (2 planned)	2
*	Milestones - ALL	Prepare and submit final report		<input type="text"/> (1 planned)	0
*	Milestones - ALL	Prepare and submit regular fiscal reports		<input type="text"/> (15 planned)	23
*	Milestones - ALL	Prepare and submit regular reports on project progress		<input type="text"/> (5 planned)	15
*	Milestones - SEND9	Promote energy efficiency programs and best energy management practices to organizational managers and technical personnel in Kentucky		<input type="text"/> (1 planned)	4

**Solution:** *A Total “To Date” for all milestones previously entered is displayed next to entry field.*



# Print or Save Current Report

**Problem:** Can the current report be downloaded for partners' records or printed?



The screenshot shows a web interface for a 'Status Report for Save Energy Now'. At the top, there are icons for print and refresh. A red box highlights these icons, and a red arrow points to a larger callout box. This callout box shows a 'PDF' button with a download icon, indicating the option to save the report as a PDF file.

**Status Report for Save Energy Now**  
PO2 127 1000003341 - Save Energy Now (ARRA)  
Reporting Period: August 2010 (Due Date: 9/5/2010)  
Submitted Date: 8/12/2010

Required	Category	Question	Answer	To Date
	Building Energy Audits	Auditor's projection of energy savings	MMBtu/yr	17317
	Building Energy Audits	Floor space audited	sq ft	1058618
	Building Energy Audits	Number of audits performed	Count	14
	Building Retrofits	Number of buildings retrofitted	Count	6
	Building Retrofits	Square footage of buildings retrofitted	sq ft	54068
*	Emissions Reductions	Amount of carbon monoxide (CO) pollutants reduced	00 metric tons	0.001
*	Emissions Reductions	Amount of greenhouse gases reduced	0 CO2 Equivalents (metric tons)	370.5
*	Emissions Reductions	Amount of nitrogen dioxide (NO2) pollutants reduced	0 metric tons	0.252
*	Emissions Reductions	Amount of particulate matter (PM) pollutants reduced	0 metric tons	0.003
*	Emissions Reductions	Amount of sulfur dioxide (SO2) pollutants reduced	0 metric tons	1.953
*	Emissions Reductions	Amount of volatile organic compounds (VOC) pollutants reduced	0 metric tons	0
	Energy Cost Savings	Annual reduction in electricity costs	0 Dollars	5840
	Energy Cost Savings	Annual reduction in fuel oil costs	0 Dollars	0

**Solution:** After submitting a report, you will see a new screen with all submitted information, giving you option to save as pdf and print

# Print or Review Previous Reports

**Problem:** Can a previously submitted report be accessed or printed?



The screenshot shows the website interface for the Energy and Environment Cabinet. The page title is "Energy and Environment Cabine". A navigation bar contains "My Projects" and "Help". A red oval highlights the "My Projects" button, and a mouse cursor points to a dropdown menu option labeled "View Status Reports". Below the navigation bar, the "Projects" section contains a table with three columns: "Contract", "Grant", and "Project".

Contract	Grant	Project
PO2 127 1000003341	Save Energy Now (ARRA)	<a href="#">Save Energy Now</a>
PO2 127 1000001034	State Energy Program (ARRA)	<a href="#">Industrial/Commercial Sustainability Program</a>
PO2 127 1000000735	State Energy Program (ARRA)	<a href="#">Kentucky Energy Efficiency Program for Schools (KEEPS)</a>

**Solution:** On the Main Page, hover your cursor over “My Projects” and then click on “View Status Reports” in drop-down. Then.....



# Print or Review Previous Reports

## Energy and Environment Cabinet

[My Projects](#)

[Help](#)



Logged In As: cmetcalf | [Logout](#)

### Status Reports

	Grant	Project	Recipient	Report Period	Year	Due Date	Submitted Date	Submitted By
3341	Save Energy Now (ARRA)	<a href="#">Save Energy Now</a>	Kentucky Pollution Prevention Center (KPPC)	July	2010	8/05/2010	8/5/2010 1:31:00 PM	Richard Meisenhelder
3341	Save Energy Now (ARRA)	<a href="#">Save Energy Now</a>	Kentucky Pollution Prevention Center (KPPC)	August	2010	9/05/2010	9/12/2010 11:17:00 AM	Cam Metcalf
1034	State Energy Program (ARRA)	<a href="#">Industrial/Commercial Sustainability Program</a>	Kentucky Pollution Prevention Center (KPPC)	July	2010	8/05/2010	8/5/2010 2:01:00 PM	Richard Meisenhelder
0735	State Energy Program (ARRA)	<a href="#">Kentucky Energy Efficiency Program for Schools (KEEPS)</a>	Kentucky Pollution Prevention Center (KPPC)	July	2010	8/05/2010	8/4/2010 4:02:00 PM	Mike Ruckriegel

*...Click submission to view. You will be able to save as pdf or print as described previously.*

