

Proposed M-RETS Upgrades

Enhancement Committee

October 16, 2012

Enhancement Committee

- \$250K was allocated by the Board for improvements
- EC Charter
 - Gather and prioritize improvement ideas (Jan – Sept 2012)
 - Create and submit Change Requests to APX (May – Sept 2012)
 - Make recommendations to Board (Sept 2012)
- Volunteer membership
- Change Requests (CRs) focused on improving user efficiency (account holder survey reinforced)
 - Filtering capabilities
 - Sorting options
 - Navigation between pages
 - Compliance verification

Major Upgrade for M-RETS

- Majority of CRs can be accommodated by modernizing M-RETS platform using Telerik
- Greatly improved user interface for existing reports
 - Sort, paging, filtering
 - Functionality similar to Excel operations
 - Fast loading of large data sets
- Better platform for continued improvements
- Grid/table component enhancements (Phase I)
- Universal navigation bar/dashboard (Potential Phase II)

Upgrade Timing

- Completion of upgrade for priority CRs by 1/31/2013
- User testing and training February/March
- Remaining functionality implemented after mid-July (remaining reports)
- No production releases between March 1 and mid-July

Phase I: Telerik

Filter by: Vintage Generating Facility Fuel Type Eligibility

 [Save Filter](#) [Advanced Filter](#)

<input type="checkbox"/>	Quantity	Transfer Quantity	SubAccount	M-RETS ID	Generating Facility	Fuel Type	Certificate Vintage	Eligibilities
<input type="checkbox"/>	2175	<input type="text"/>	Default Active	M208	Flambeau Hydroelectric Station	Hydroelectric Water	1/2011	View
<input type="checkbox"/>	6602	<input type="text"/>	Default Active	M208	Flambeau Hydroelectric Station	Hydroelectric Water	2/2011	View
<input type="checkbox"/>	1287	<input type="text"/>	Default Active	M208	Flambeau Hydroelectric Station	Hydroelectric Water	3/2011	View
<input type="checkbox"/>	724	<input type="text"/>	Default Active	M208	Flambeau Hydroelectric Station	Hydroelectric Water	4/2011	View
<input type="checkbox"/>	3569	<input type="text"/>	Default Active	M208	Flambeau Hydroelectric Station	Hydroelectric Water	5/2011	View
<input type="checkbox"/>	579	<input type="text"/>	Default Active	M208	Flambeau Hydroelectric Station	Hydroelectric Water	6/2011	View
<input type="checkbox"/>	3170	<input type="text"/>	Default Active	M208	Flambeau Hydroelectric Station	Hydroelectric Water	7/2011	View
<input type="checkbox"/>	2124	<input type="text"/>	Default Active	M208	Flambeau Hydroelectric Station	Hydroelectric Water	8/2011	View
<input type="checkbox"/>	3721	<input type="text"/>	Default Active	M208	Flambeau Hydroelectric Station	Hydroelectric Water	9/2011	View
<input type="checkbox"/>	300	<input type="text"/>	Default Active	M183	Shanak I - RRC 249	Hydroelectric Water	6/2010	View

Total 0 << first < prev 1 2 3 next > last >> Results per page:

- Filter criteria (multi-select criteria, e.g., filter on WI or IL eligibility)
- Advanced filter to filter on all criteria
- Ability to save/search on saved filter criteria
- Ability to sort on more than one column
- Ability to toggle to display/hide columns
- Ability to print, save the table results

Phase I: Telerik

Filter / RadGrid filtering with RadFilter

Rate / Review ▾

Office2010Silver skin ▾

AND +≡ +[2] ×

OrderDate EqualTo [] [] ×

AND +≡ +[2] ×

Freight EqualTo 0.00 ×

Apply filter []

OrderID	OrderDate	Quantity	Product Name	ShipAddress	Freight
10248		0	alcools Chevalier	59 rue de l'Abbaye	32.38
10249		0	Spezialitäten	Luisenstr. 48	11.61
10250		0	Carnes	Rua do Paço, 67	65.83
10251		0	lles en stock	2, rue du Commerce	41.34
10252		0	nes délices	Boulevard Tirou, 255	51.30
10253		0	Carnes	Rua do Paço, 67	58.17
10254	07/11/1996	2	Chop-suey Chinese	Hauptstr. 31	22.98
10255	07/12/1996	3	Richter Supermarkt	Starenweg 5	148.33
10256	07/15/1996	2	Wellington Importadora	Rua do Mercado, 12	13.97
10257	07/16/1996	3	HILARION-Abastos	Carrera 22 con Ave. Carlos Soublette #8-35	81.91

EqualTo
NotEqualTo
GreaterThan
LessThan
GreaterThanOrEqualTo
LessThanOrEqualTo
Between
NotBetween
IsNull
NotNull

Page size: 10 ▾

830 items in 83 pages

- Dynamic Search Criteria

Demonstration

DEMO

- <http://demos.telerik.com/aspnet-ajax/grid/examples/programming/draganddrop/defaultcs.aspx>
- More information on Telerik can be found at:
<http://www.telerik.com/products/aspnet-ajax/grid.aspx>

EC Recommendation

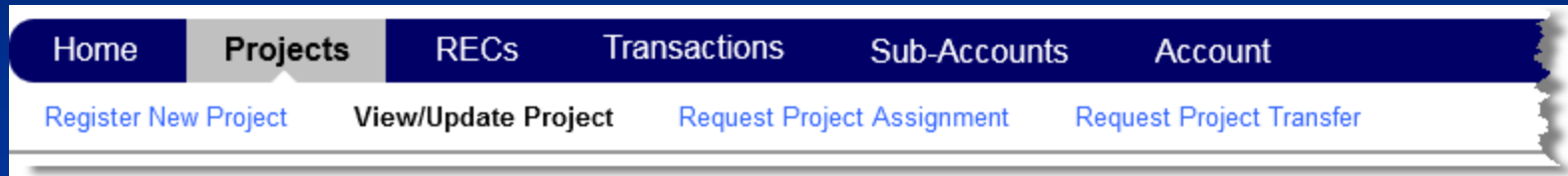
- Received Board authorization for payments of up to \$125,000 from enhancement fund
 - The Telerik platform upgrade (Phase I) for all M-RETS reports (\$96K)
 - Remaining CRs not covered by platform upgrade (\$29K)

What Does This Mean to You?

- Modernized M-RETS interface with increased user efficiency by end of January 2013
- Training opportunities February/March 2013
- Continued M-RETS improvement ideas
 - Fill out a Change Request form and send to Amy
 - Send an e-mail to an EC member outlining your idea
 - Join the EC!

Questions?

Phase II: Navigation



- Add new navigation (bar or tabs) to top of screens
- 2-tier
- Provides access to existing screens and used to initiate existing actions (e.g., request project transfer)
- Navigation options displayed based on account type and user rights (e.g., “Projects” only displays to accounts that can register projects)

Phase II Opportunity

- Improved navigation
 - Multiple tab headers
 - Hyperlinked information from project record
 - Return to previous screen used instead of home screen after task completion
 - Other ideas?
- Dashboard (home page) improvements

Phase II: Project Record

Home Projects RECs Sub-Accounts Account

[Register New Project](#) [View/Update Project](#) [Request Project Assignment](#) [Request Project Transfer](#)

View/Update Project: Chalk Hill - Unit 224 [Copy this project](#)

Operating Information Company/Ownership/Contact Information Program Eligibility Documents Self-Reporting/Facility Output Data Administration

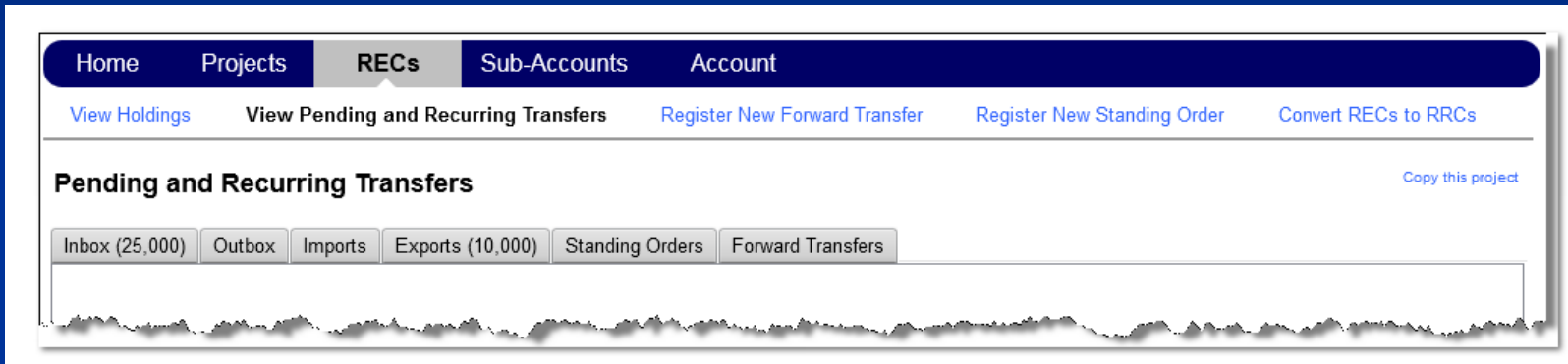
Reporting Entity: Reporting Entity Unit:

Year: Facility ID - Name:

Period Data Status	Vintage	MWh	Begin	End	Adjustment Current (MWh)	Adjustment New Status	Adjustment New (MWh)
Cert	Created						

- Tabs visually group project information, increase ease of access to info
- Break out generator info onto multiple tabs (so screen isn't so long)
- Icons to convey tab-related info (e.g., more info is needed)
- Tabs displayed based on user role, account type

Phase II: Pending Transactions



- Groups and displays pending transfers and recurring transfers
- Provides more info, functionality to handle incoming transfers/imports

Appendix

- For examples of upgrades, see Change Requests in your packet