ICAP PORTAL ADVANCED USER GUIDE

DECEMBER 1, 2016

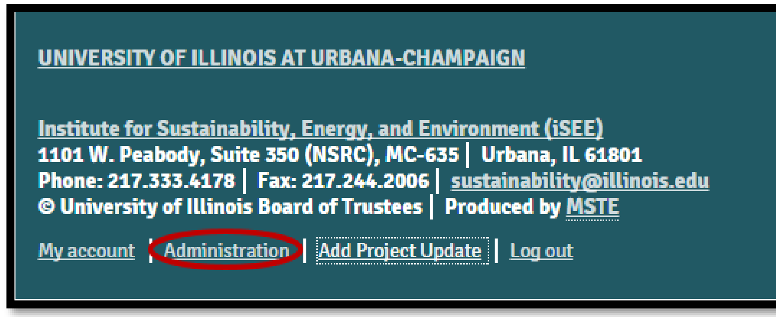
Contents

Welcome

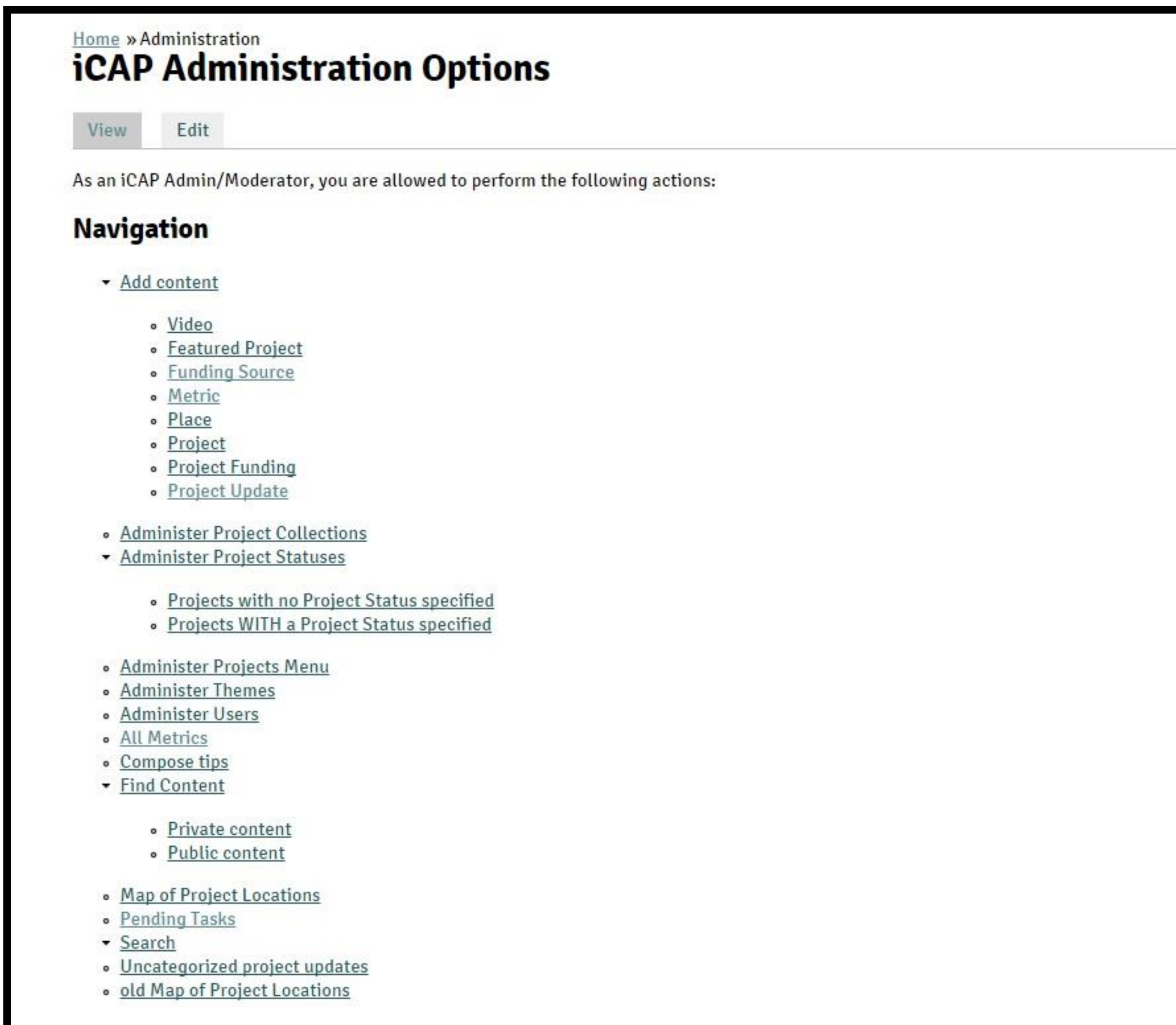
Congratulations, SWATeam Clerks! You have made it! Now that you have the basic understanding on how to work on the Illinois Climate Action Plan (iCAP) Portal, it is time for you to learn how to do some of the more advanced work on the portal. You will be given access to the 'Administration' option which would allow you more control over the portal. This Advanced User Guide will prepare you for it.

1. Administration option

Once you login to the portal, you will see the '[Administration](#)' option at the bottom of your screen, between '[My account](#)' and '[Add Project Update](#)'.



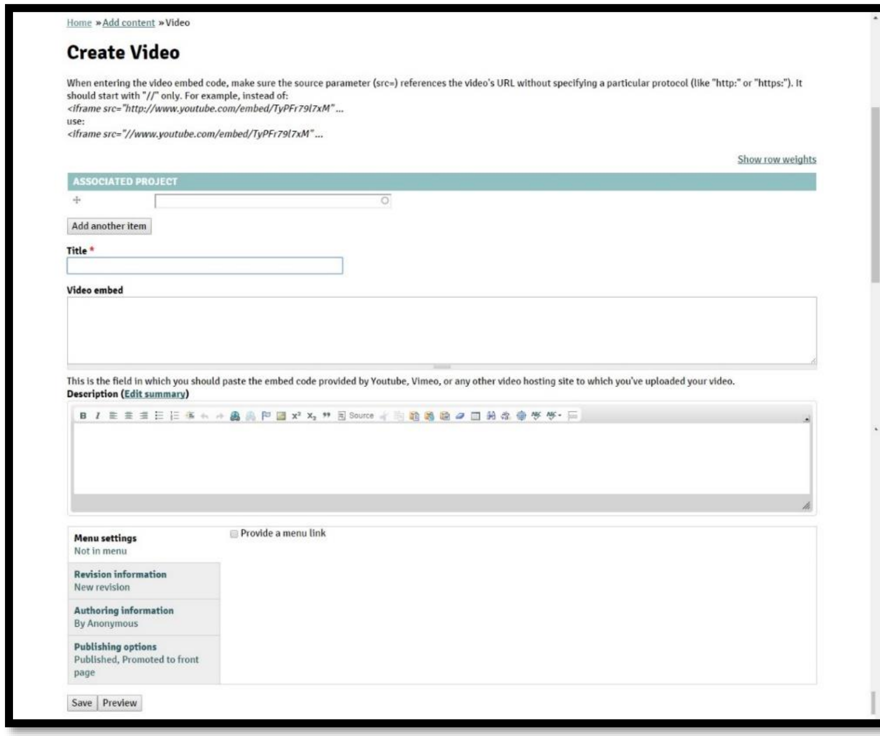
Once you click on the 'Administration' option following window will open:



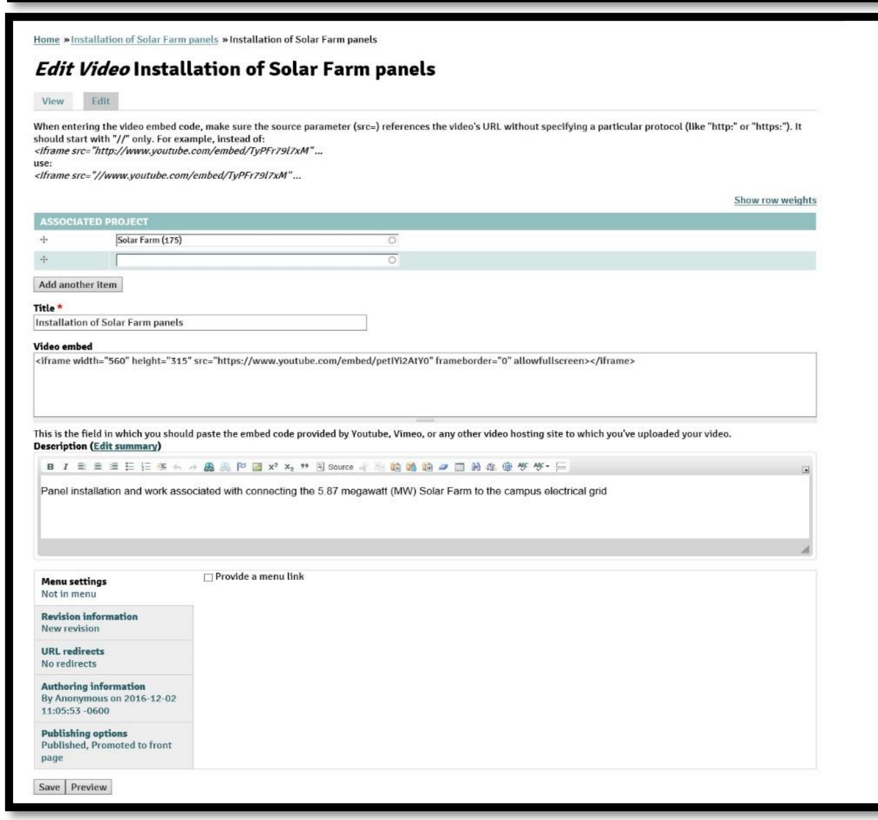
Using the Administration option, authorized users can add video, funding source, metrics, place, project funding, and project updates to a specific project. SWATeam Clerks are not authorized to add projects or featured projects. Only iCAP Administrators can add these contents.

1.1. Adding videos

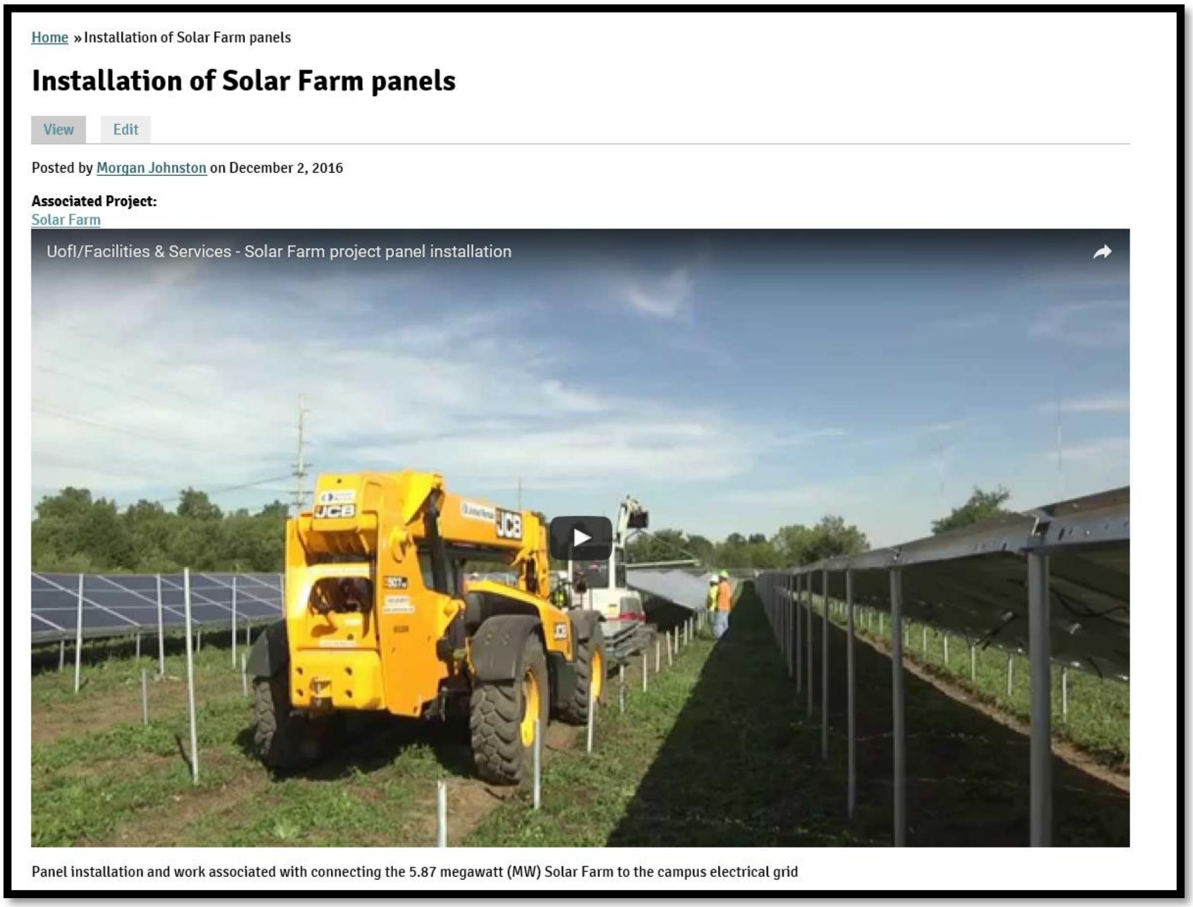
It is recommended to upload a video, if a video relevant to a project is present on YouTube or any other website. You can add that video using the '[Video](#)' option under 'Add Content' in the 'Administration' option.



- Enter the name of the project associated with the video in the 'Associated Project' field. Use 'Add another item' to add multiple projects.
- Enter the desired title for the video in the 'Title' field.
- In the 'Video Embed' field, enter the embedding code for the video. You can find it once you press the 'Share' button for the video under the 'Embed' field.
- Provide a brief description of the video in the 'Description' box.
- Click on 'Save'.



- Once uploaded, the video will be displayed as following:



1.2. Adding a Funding Source

Detailed instructions on adding funding sources are provided later in this User Guide.

1.3. Adding Metrics

Detailed instructions on adding metrics are provided later in this User Guide.

1.4. Adding Place

Please refer to the original iCAP Portal User Guide Chapter three: Editing the Project – 9. Locations, for information on how to add a Place.

1.5. Adding Project Funding

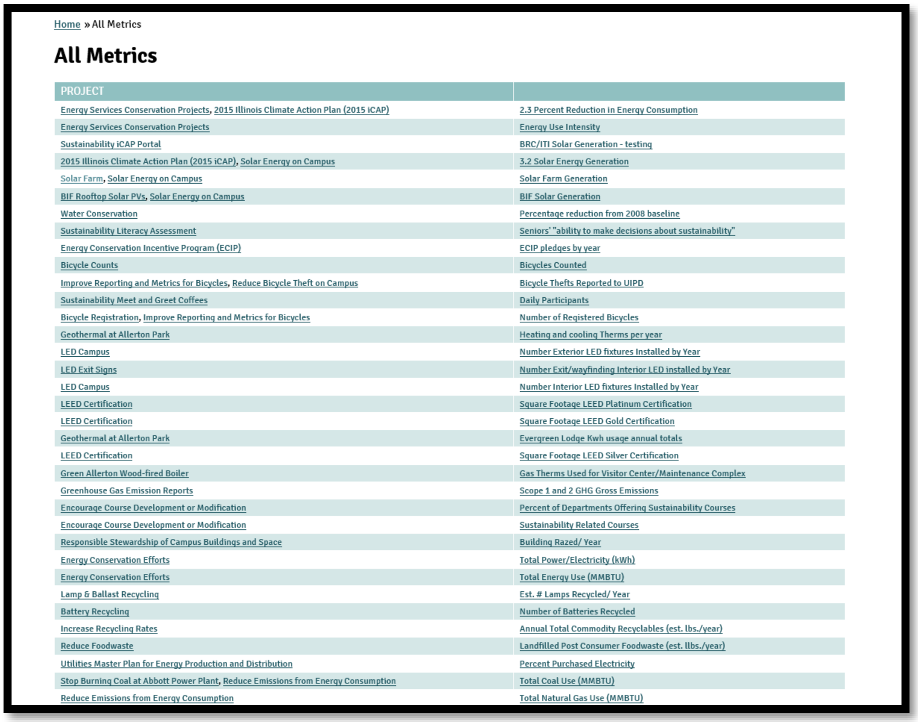
Detailed instructions on adding Project Funding are provided later in this User Guide.

1.6. Adding Project Updates

Please refer to the original iCAP Portal User Guide Chapter two: Project Updates, for information on how to add Project Updates.

1.7. All Metrics

Using this option, SWATeam Clerks will be able to see all metrics that have been entered in the iCAP Portal for all the projects. Although, they can only make changes to the ones that they entered themselves.



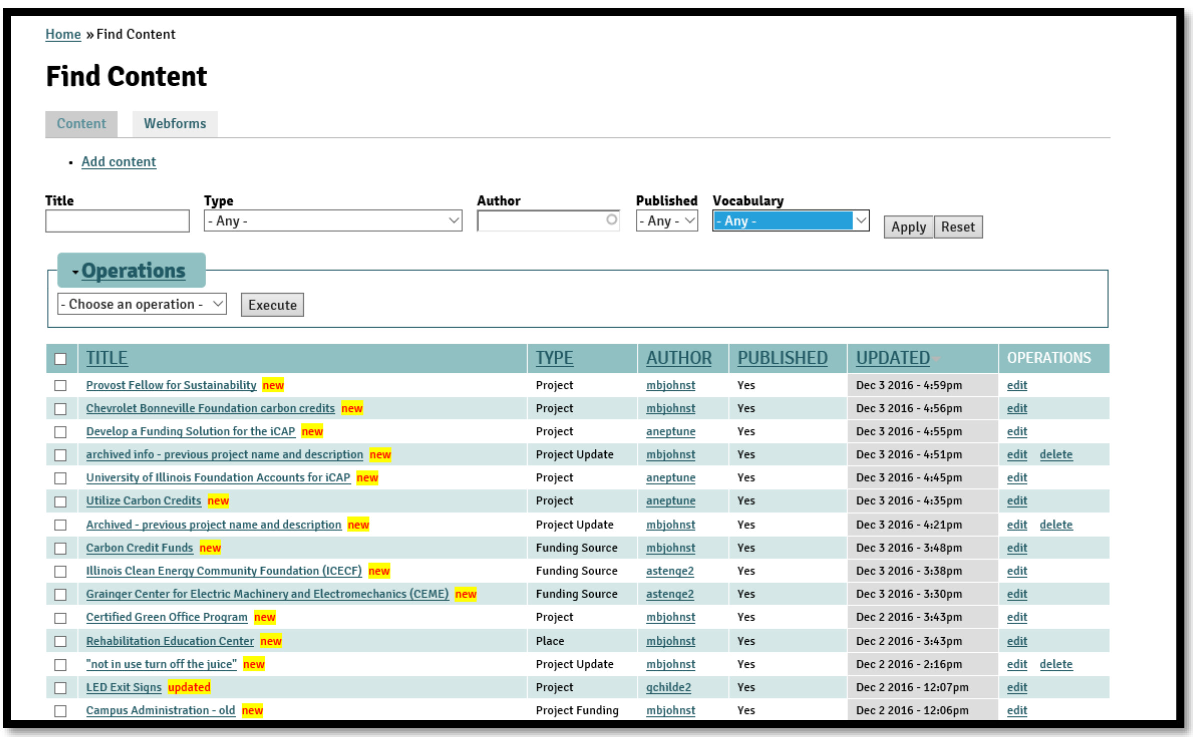
Home » All Metrics

All Metrics

PROJECT	
Energy Services Conservation Projects, 2015 Illinois Climate Action Plan (2015 iCAP)	2.3 Percent Reduction in Energy Consumption
Energy Services Conservation Projects	Energy Use Intensity
Sustainability iCAP Portal	BRC/ITI Solar Generation - testing
2015 Illinois Climate Action Plan (2015 iCAP), Solar Energy on Campus	3.2 Solar Energy Generation
Solar Farm, Solar Energy on Campus	Solar Farm Generation
BIF Rooftop Solar PVs, Solar Energy on Campus	BIF Solar Generation
Water Conservation	Percentage reduction from 2008 baseline
Sustainability Literacy Assessment	Seniors' "ability to make decisions about sustainability"
Energy Conservation Incentive Program (ECIP)	ECIP pledges by year
Bicycle Counts	Bicycles Counted
Improve Reporting and Metrics for Bicycles, Reduce Bicycle Theft on Campus	Bicycle Thefts Reported to UIPD
Sustainability Meet and Greet Coffees	Daily Participants
Bicycle Registration, Improve Reporting and Metrics for Bicycles	Number of Registered Bicycles
Geothermal at Allerton Park	Heating and cooling Therms per year
LED Campus	Number Exterior LED fixtures Installed by Year
LED Exit Signs	Number Exit/wayfinding Interior LED installed by Year
LED Campus	Number Interior LED fixtures Installed by Year
LEED Certification	Square Footage LEED Platinum Certification
LEED Certification	Square Footage LEED Gold Certification
Geothermal at Allerton Park	Evergreen Lodge Kwh usage annual totals
LEED Certification	Square Footage LEED Silver Certification
Green Allerton Wood-fired Boiler	Gas Therms Used for Visitor Center/Maintenance Complex
Greenhouse Gas Emission Reports	Scope 1 and 2 GHG Gross Emissions
Encourage Course Development or Modification	Percent of Departments Offering Sustainability Courses
Encourage Course Development or Modification	Sustainability Related Courses
Responsible Stewardship of Campus Buildings and Space	Building Razed/ Year
Energy Conservation Efforts	Total Power/Electricity (kWh)
Energy Conservation Efforts	Total Energy Use (MMBTU)
Lamp & Ballast Recycling	Est. # Lamps Recycled/ Year
Battery Recycling	Number of Batteries Recycled
Increase Recycling Rates	Annual Total Commodity Recyclables (est. lbs./year)
Reduce Foodwaste	Landfilled Post Consumer Foodwaste (est. llbs./year)
Utilities Master Plan for Energy Production and Distribution	Percent Purchased Electricity
Stop Burning Coal at Abbott Power Plant, Reduce Emissions from Energy Consumption	Total Coal Use (MMBTU)
Reduce Emissions from Energy Consumption	Total Natural Gas Use (MMBTU)

1.8. Find Content

Using the 'Find Content' option, the SWATeam Clerks can search within the iCAP Portal based on the title, author, type of content (for e.g. projects, project updates, tasks, metrics, etc.), published, etc.



Home » Find Content

Find Content

Content Webforms

- Add content

Title | Type - Any - | Author | Published - Any - | Vocabulary - Any - | Apply | Reset

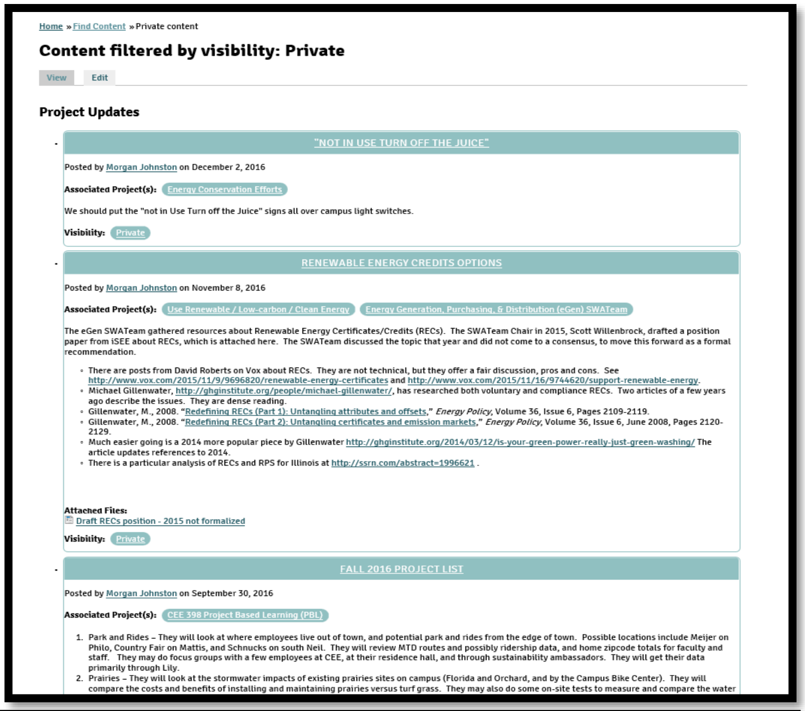
Operations

- Choose an operation - | Execute

	TITLE	TYPE	AUTHOR	PUBLISHED	UPDATED	OPERATIONS
☐	Provost Fellow for Sustainability new	Project	mbjohnst	Yes	Dec 3 2016 - 4:59pm	edit
☐	Chevrolet Bonneville Foundation carbon credits new	Project	mbjohnst	Yes	Dec 3 2016 - 4:56pm	edit
☐	Develop a Funding Solution for the iCAP new	Project	aneptune	Yes	Dec 3 2016 - 4:55pm	edit
☐	archived info - previous project name and description new	Project Update	mbjohnst	Yes	Dec 3 2016 - 4:51pm	edit delete
☐	University of Illinois Foundation Accounts for iCAP new	Project	aneptune	Yes	Dec 3 2016 - 4:45pm	edit
☐	Utilize Carbon Credits new	Project	aneptune	Yes	Dec 3 2016 - 4:35pm	edit
☐	Archived - previous project name and description new	Project Update	mbjohnst	Yes	Dec 3 2016 - 4:21pm	edit delete
☐	Carbon Credit Funds new	Funding Source	mbjohnst	Yes	Dec 3 2016 - 3:48pm	edit
☐	Illinois Clean Energy Community Foundation (ICECF) new	Funding Source	astenge2	Yes	Dec 3 2016 - 3:38pm	edit
☐	Grainger Center for Electric Machinery and Electromechanics (CEME) new	Funding Source	astenge2	Yes	Dec 3 2016 - 3:30pm	edit
☐	Certified Green Office Program new	Project	mbjohnst	Yes	Dec 2 2016 - 3:43pm	edit
☐	Rehabilitation Education Center new	Place	mbjohnst	Yes	Dec 2 2016 - 3:43pm	edit
☐	"not in use turn off the juice" new	Project Update	mbjohnst	Yes	Dec 2 2016 - 2:16pm	edit delete
☐	LED Exit Signs updated	Project	gchilde2	Yes	Dec 2 2016 - 12:07pm	edit
☐	Campus Administration - old new	Project Funding	mbjohnst	Yes	Dec 2 2016 - 12:06pm	edit

1.8.1. Private Content

Using the 'Private Content' option from the Administration options, SWATeam Clerks are able to view all the project updates that are in private visibility. They can click on the project updates and edit the ones they wrote.



Home » Find Content » Private content

Content filtered by visibility: Private

View Edit

Project Updates

- "NOT IN USE TURN OFF THE JUICE"

  Posted by Morgan Johnston on December 2, 2016

  Associated Project(s): Energy Conservation Efforts

  We should put the "not in Use Turn off the Juice" signs all over campus light switches.

  Visibility: Private

- RENEWABLE ENERGY CREDITS OPTIONS

  Posted by Morgan Johnston on November 8, 2016

  Associated Project(s): Use Renewable / Low-carbon / Clean Energy   Energy Generation, Purchasing, & Distribution (eGen) SWATeam

  The eGen SWATeam gathered resources about Renewable Energy Certificates/Credits (RECs). The SWATeam Chair in 2015, Scott Willenbrock, drafted a position paper from iSEE about RECs, which is attached here. The SWATeam discussed the topic that year and did not come to a consensus, to move this forward as a formal recommendation.

  - There are posts from David Roberts on Vox about RECs. They are not technical, but they offer a fair discussion, pros and cons. See http://www.vox.com/2015/11/9/9696820/renewable-energy-certificates and http://www.vox.com/2015/11/16/9744620/support-renewable-energy.
  - Michael Gillenwater, http://ghginstitute.org/people/michael-gillenwater/, has researched both voluntary and compliance RECs. Two articles of a few years ago describe the issues. They are dense reading.
  - Gillenwater, M., 2008. "Redefining RECs (Part 1): Untangling attributes and offsets," *Energy Policy*, Volume 36, Issue 6, Pages 2109-2119.
  - Gillenwater, M., 2008. "Redefining RECs (Part 2): Untangling certificates and emission markets," *Energy Policy*, Volume 36, Issue 6, June 2008, Pages 2120-2129.
  - Much easier going is a 2014 more popular piece by Gillenwater http://ghginstitute.org/2014/03/12/is-your-green-power-really-just-green-washing/ The article updates references to 2014.
  - There is a particular analysis of RECs and RPS for Illinois at http://ssrn.com/abstract=1996621 .

  Attached Files:
  Draft RECs position - 2015 not formalized

  Visibility: Private

- FALL 2016 PROJECT LIST

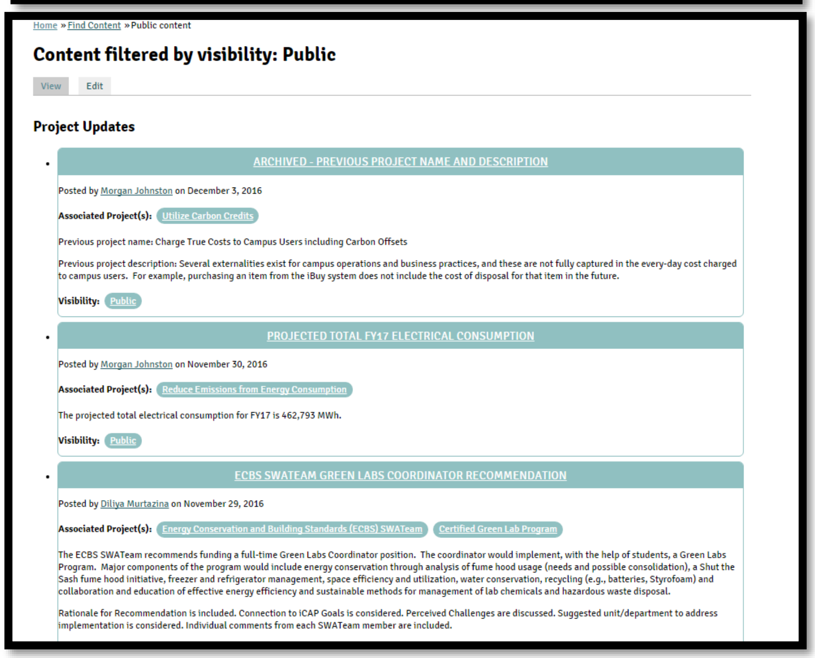
  Posted by Morgan Johnston on September 30, 2016

  Associated Project(s): CEE 398 Project Based Learning (PBL)

  1. Park and Rides – They will look at where employees live out of town, and potential park and rides from the edge of town. Possible locations include Meijer on Philo, Country Fair on Mattis, and Schnucks on south Neil. They will review MTD routes and possibly ridership data, and home zipcode totals for faculty and staff. They may do focus groups with a few employees at CEE, at their residence hall, and through sustainability ambassadors. They will get their data primarily through Lily.
  2. Prairies – They will look at the stormwater impacts of existing prairies sites on campus (Florida and Orchard, and by the Campus Bike Center). They will compare the costs and benefits of installing and maintaining prairies versus turf grass. They may also do some on-site tests to measure and compare the water

1.8.2. Public Content

Using the 'Public Content' option from the Administration options, SWATeam Clerks are able to view all the project updates that are in public visibility. They can click on the project updates and edit the ones they wrote.



Home » Find Content » Public content

Content filtered by visibility: Public

View Edit

Project Updates

- ARCHIVED - PREVIOUS PROJECT NAME AND DESCRIPTION

  Posted by Morgan Johnston on December 3, 2016

  Associated Project(s): Utilize Carbon Credits

  Previous project name: Charge True Costs to Campus Users including Carbon Offsets

  Previous project description: Several externalities exist for campus operations and business practices, and these are not fully captured in the every-day cost charged to campus users. For example, purchasing an item from the iBuy system does not include the cost of disposal for that item in the future.

  Visibility: Public

- PROJECTED TOTAL FY17 ELECTRICAL CONSUMPTION

  Posted by Morgan Johnston on November 30, 2016

  Associated Project(s): Reduce Emissions from Energy Consumption

  The projected total electrical consumption for FY17 is 462,793 MWh.

  Visibility: Public

- ECBS SWATEAM GREEN LABS COORDINATOR RECOMMENDATION

  Posted by Diliya Murtazina on November 29, 2016

  Associated Project(s): Energy Conservation and Building Standards (ECBS) SWATeam   Certified Green Lab Program

  The ECBS SWATeam recommends funding a full-time Green Labs Coordinator position. The coordinator would implement, with the help of students, a Green Labs Program. Major components of the program would include energy conservation through analysis of fume hood usage (needs and possible consolidation), a Shut the Sash fume hood initiative, freezer and refrigerator management, space efficiency and utilization, water conservation, recycling (e.g., batteries, Styrofoam) and collaboration and education of effective energy efficiency and sustainable methods for management of lab chemicals and hazardous waste disposal.

  Rationale for Recommendation is included. Connection to iCAP Goals is considered. Perceived Challenges are discussed. Suggested unit/department to address implementation is considered. Individual comments from each SWATeam member are included.

1.9. Map of Project Locations

Please refer to the original iCAP Portal User Guide Chapter one: iCAP Portal Overview, for information on Map of Project Locations.

1.10. Pending Tasks

Using this feature, SWATeam Clerks can keep track of the pending tasks to the SWATeam members, their due date, and if/when was the task completed. It displays the list of all the tasks pending, who it was assigned to, the title of the task, and the associated project.

Home » Pending Tasks

Pending Tasks

Pending Tasks are tasks which have a due date and no completion date.

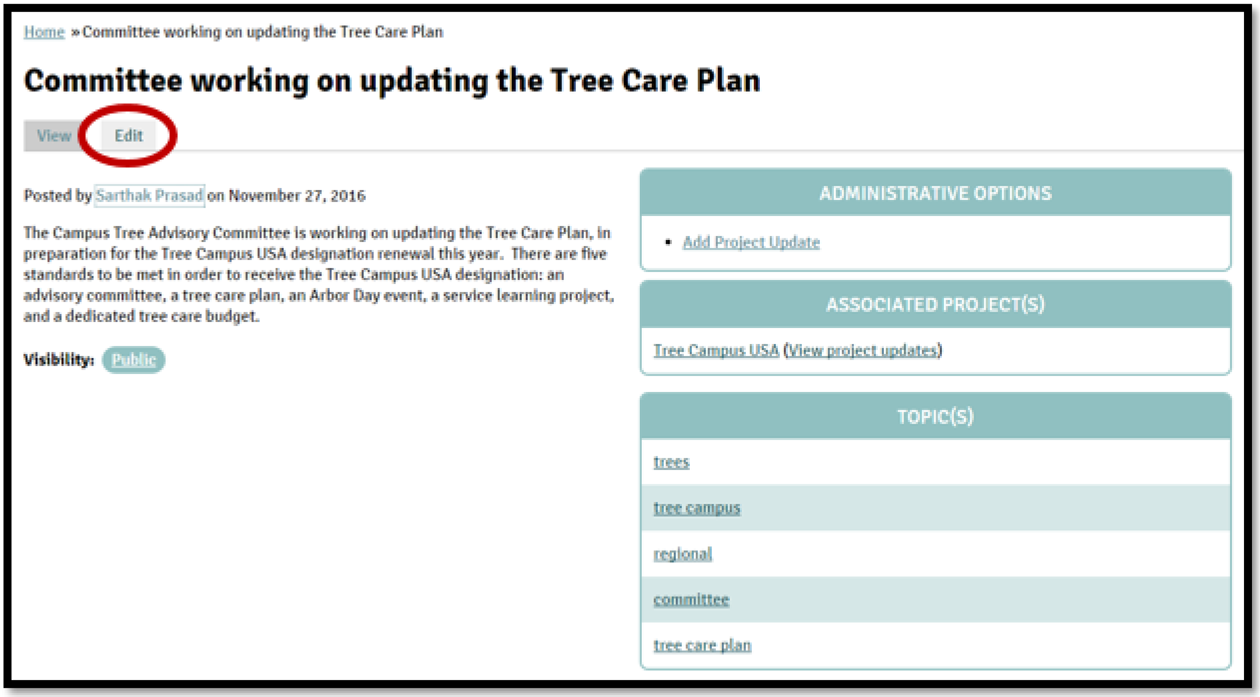
Sort by Due Date **Order** Asc Apply

DUE DATE	ASSIGNED TO	TITLE	PROJECT
Friday, June 30, 2017	Morgan Johnston	"not in use turn off the juice"	Energy Conservation Efforts

Editing Project Updates

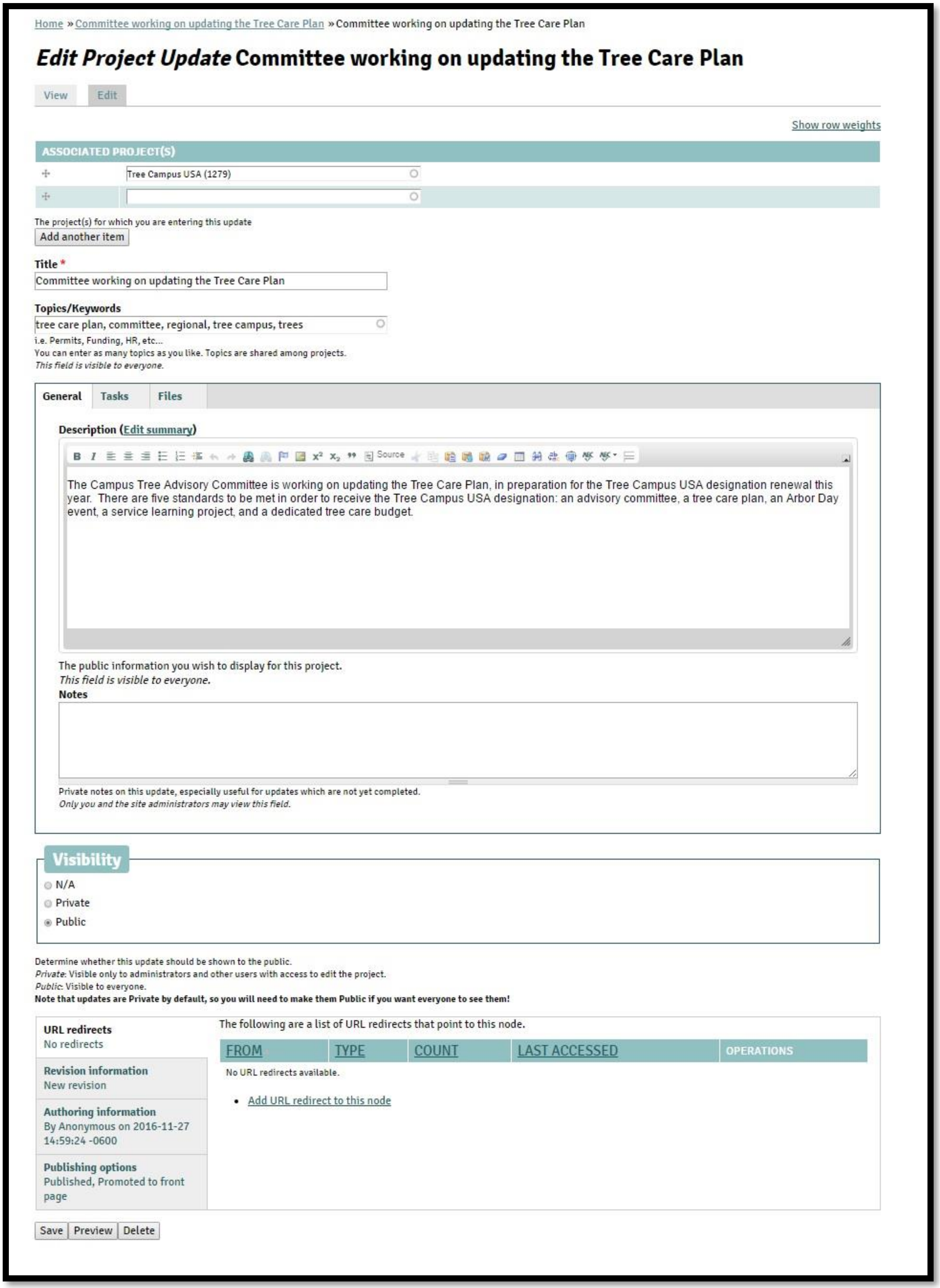
As discussed in the original iCAP Portal User Guide, project updates help create a comprehensive history of the project. For more information about the project updates and how to add new project updates, please refer to the [iCAP Portal User Guide].

Once the project update is posted, it can be viewed in this following form:



The organization of these project updates are very simple. The title of the update and description on this page makes sure that the reader understand the topic at hand easily. The author's name is mentioned in the update, along with the date it was published. It further mentions the project(s) associated with this update, and the topic(s) or keyword(s) in this update.

The authorized users can edit this project update by clicking on the 'Edit' button, next to the 'View' button. This function is used if there had been any mistake in the update or any correction has to be made. This will open a window similar to the following:



Home » Committee working on updating the Tree Care Plan » Committee working on updating the Tree Care Plan

Edit Project Update Committee working on updating the Tree Care Plan

View | Edit

Show row weights

ASSOCIATED PROJECT(S)
Tree Campus USA (1279)

The project(s) for which you are entering this update

Add another item

Title *

Committee working on updating the Tree Care Plan

Topics/Keywords

tree care plan, committee, regional, tree campus, trees

i.e. Permits, Funding, HR, etc...
You can enter as many topics as you like. Topics are shared among projects.
This field is visible to everyone.

General | Tasks | Files

Description (Edit summary)

Source

The Campus Tree Advisory Committee is working on updating the Tree Care Plan, in preparation for the Tree Campus USA designation renewal this year. There are five standards to be met in order to receive the Tree Campus USA designation: an advisory committee, a tree care plan, an Arbor Day event, a service learning project, and a dedicated tree care budget.

The public information you wish to display for this project.
This field is visible to everyone.

Notes

Private notes on this update, especially useful for updates which are not yet completed.
Only you and the site administrators may view this field.

Visibility

- N/A
- Private
- Public

Determine whether this update should be shown to the public.
Private: Visible only to administrators and other users with access to edit the project.
Public: Visible to everyone.
Note that updates are Private by default, so you will need to make them Public if you want everyone to see them!

URL redirects
No redirects

Revision information
New revision

Authoring information
By Anonymous on 2016-11-27 14:59:24 -0600

Publishing options
Published, Promoted to front page

The following are a list of URL redirects that point to this node.

FROM	TYPE	COUNT	LAST ACCESSED	OPERATIONS
No URL redirects available.				

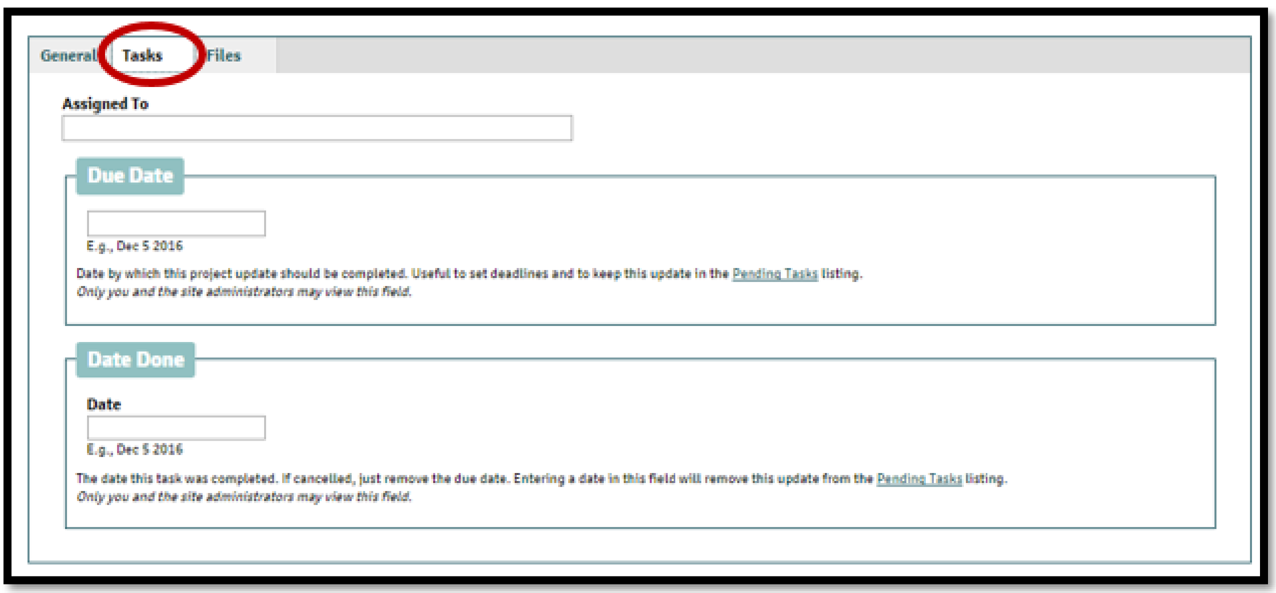
- Add URL redirect to this node

Save | Preview | Delete

- Associated Projects field: Type the correct name of the project associated with project update or add any other project that was associated but was not reported previously.
- Title field: Edit the title of the update.
- Topics/Keywords field: Add any additional topics or keywords that is related to the project update. For more information on how to determine the topic(s)/keyword(s), please refer to the iCAP Portal User Guide.
- Description field: Edit the description in this field. For more information on how to write the description, please refer to the iCAP Portal User Guide.
- Change the visibility of the project update in the Visibility field.
- Files: For more information on how to upload related files, please refer to the iCAP Portal User Guide.
- Click on 'Save' at the bottom of the page when finished.

1. Tasks

Tasks can be assigned to different the SWATeam clerks or members in the project updates. 'Tasks' tab is found in between of the 'General' and 'Files' tab.

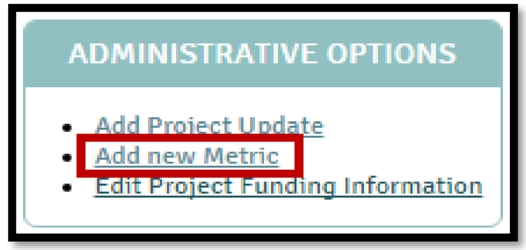


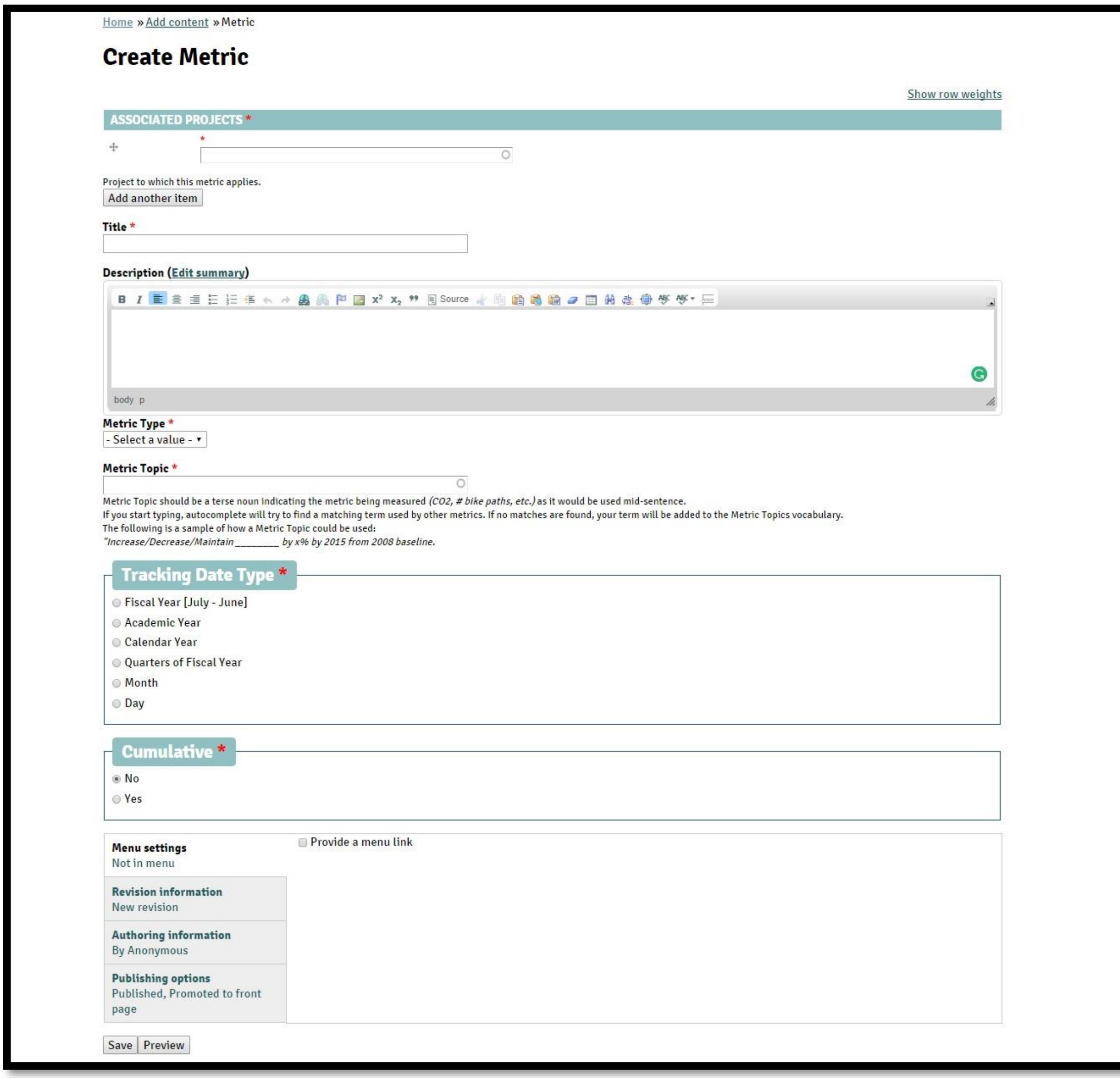
In the 'Assigned to' field, enter the name of the person responsible to finish the said task. Enter the date when the task is due in the 'Due date' field and once the task is completed, enter the date in the 'Date done' field. All of these tasks can be tracked by the 'Pending tasks' option using 'Administration'.

Metrics

1. Create Metrics

SWATeam Clerks can create metrics via '[Administration]' option on the bottom of the screen – next to 'My account', or via '[Add new Metric]' under the 'Administrative Options' on the right hand side of the screen of any project.

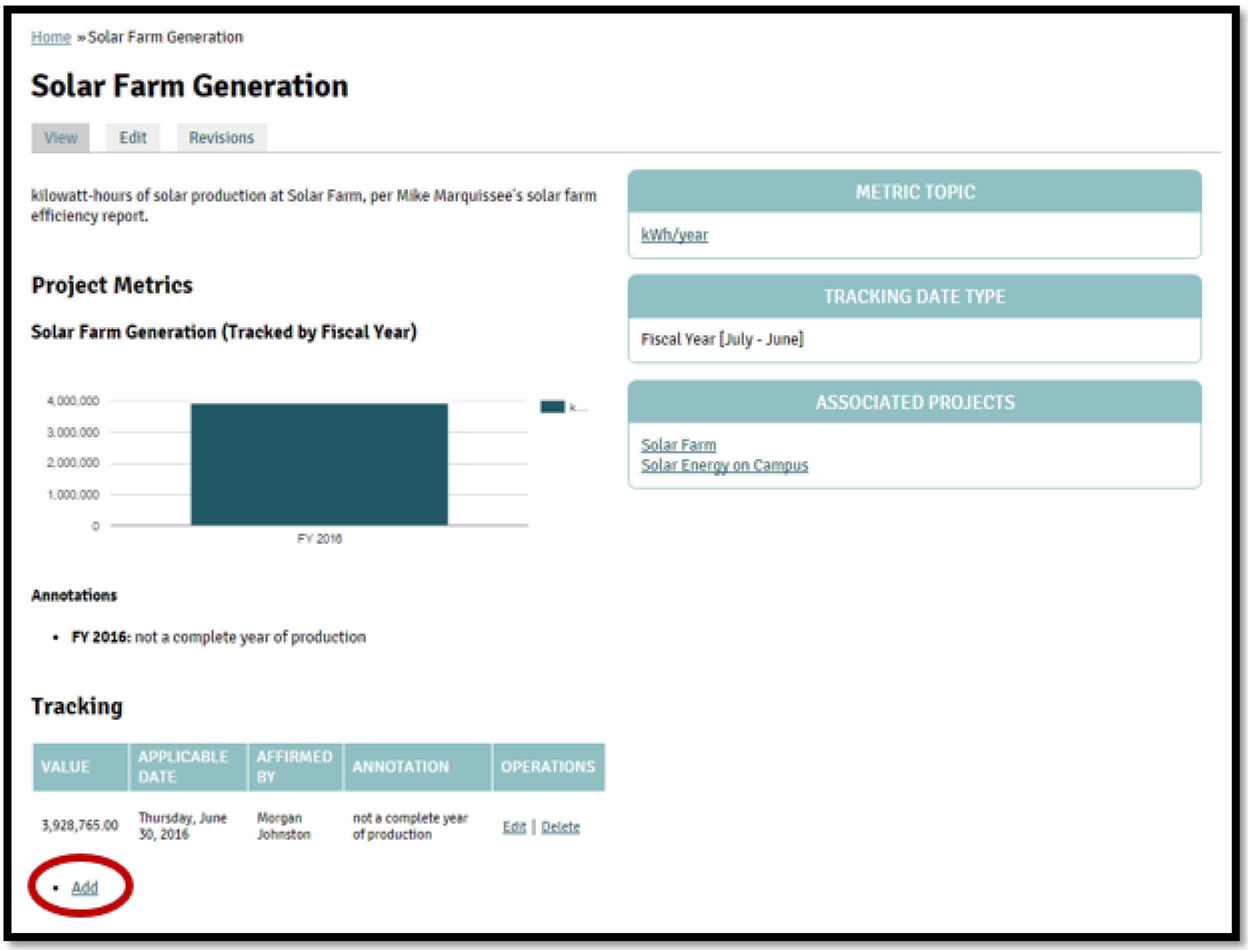




- Enter the name of the project associated to the metrics in the 'Associated Projects' field. If there are multiple projects related to the metric, use the 'Add another item' to add another project.

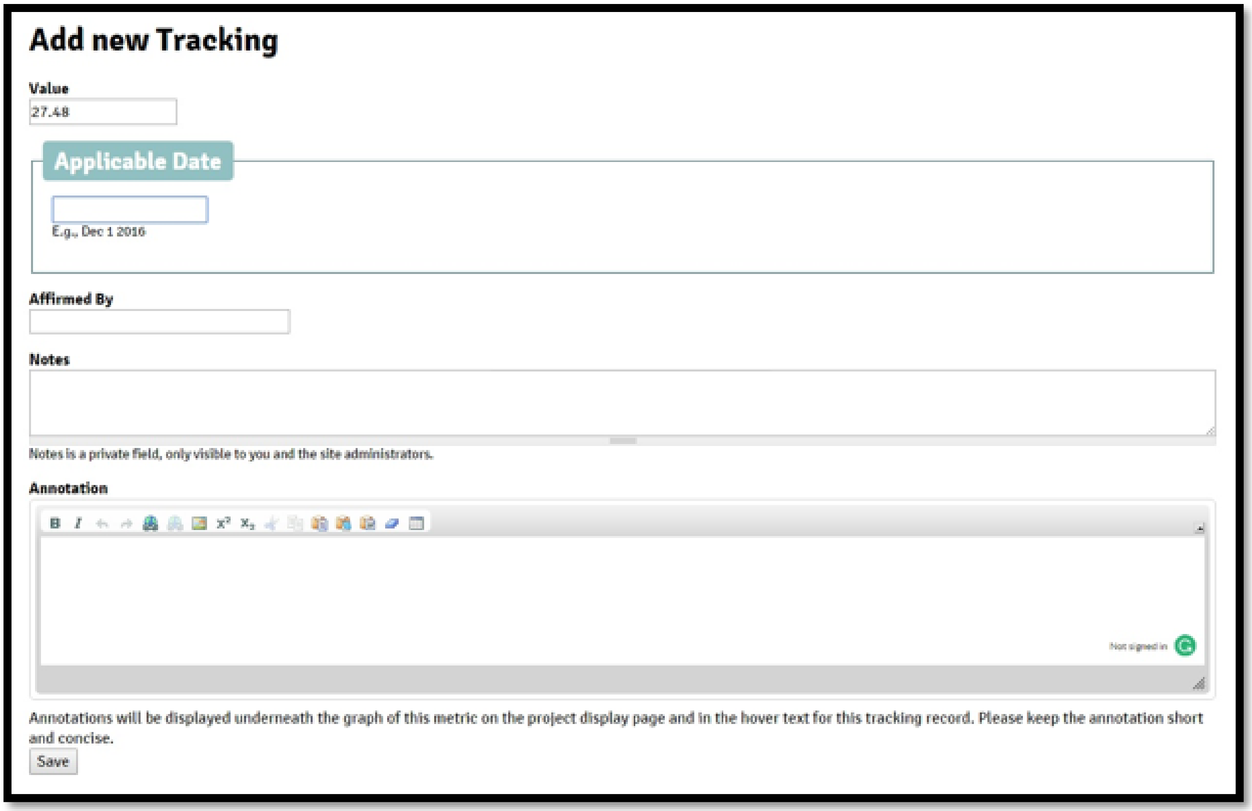
- Type the title of the metric in the 'title' field.
- Enter the explanation of the metric in the 'Description' field.
- Select the 'Metric type' from the drop down menu. The three options for the type of metrics are 'Number', 'Dollar', and 'Percentage'.
- Enter the Metric Topic. It should be a terse noun indicating the metric being measured *(CO2, # bike paths, etc.)* as it would be used mid-sentence. If you start typing, autocomplete will try to find a matching term used by other metrics. If no matches are found, your term will be added to the Metric Topics vocabulary.
- Select one of the six options of 'Tracking Date Type'.
- Select if the metric is cumulative or not.
- Click on 'Save' when finished.

Once the metric is saved, one can start adding the tracking data, which would show up on the main metrics page.



2. Metrics tracking

Once you click on 'Add' on the metric page, under 'Tracking', the following page – 'Add new Tracking', will open where you can enter the metric tracking details.



- Enter the value of the tracking following the metric type selected earlier – either 'Number', 'Dollar', or 'Percentage'.
- Enter the applicable date following the format of 'Tracking Date Type'. For example, if you chose Fiscal year as the Tracking Date Type, then the applicable date would generally be, the last date of the fiscal year. E.g., for FY16, the applicable date will be June 30, 2015.
- Enter the name of person, who affirmed the metric value and date.
- In Annotation, add the significance of this tracking value. For instance, suppose you entered the tracking value for FY08 which was the baseline year for the metric. So, for this tracking value, you should put 'Baseline year' in the Annotation field.
- Enter any personal notes in the Notes field. The text entered in this field will not be visible to the public.
- Click on 'Save' to finish.

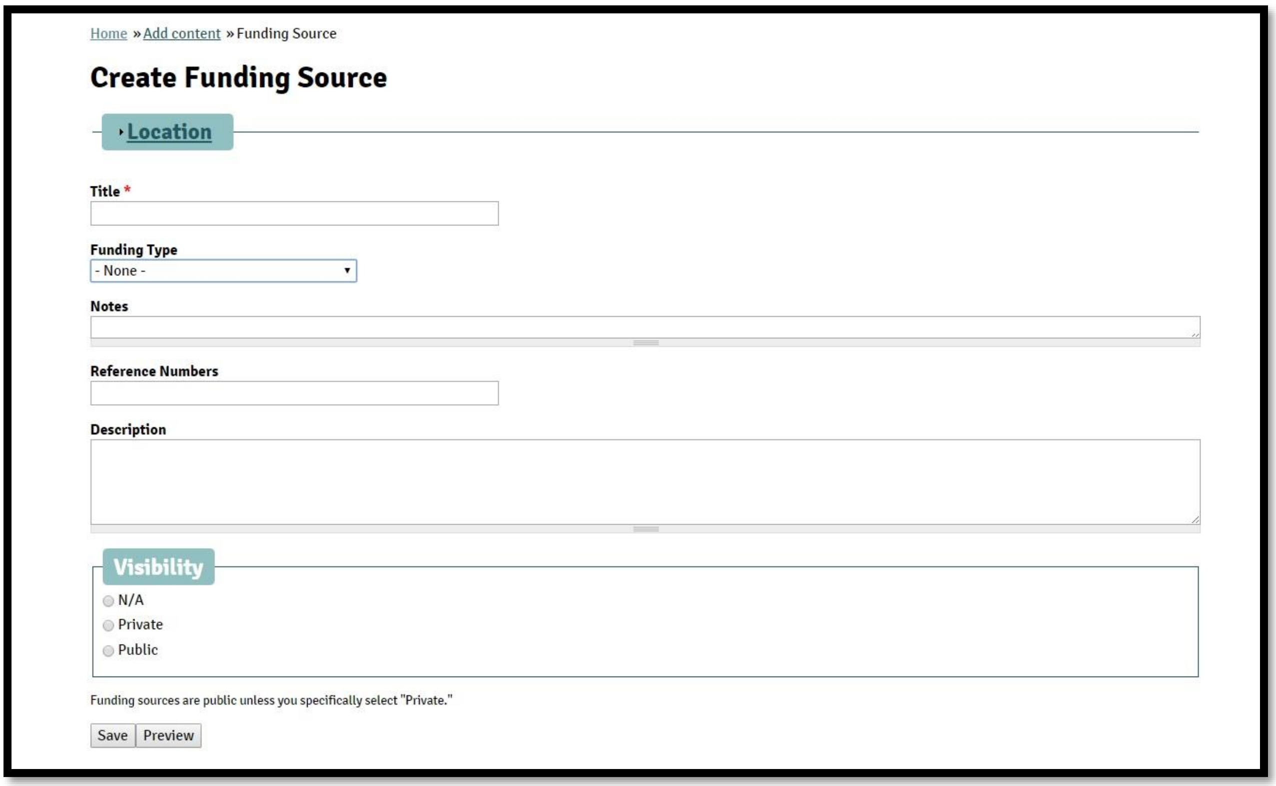
Funding

The iCAP Portal has a robust tracking mechanism of funding. This is not a substitute for financial accounting, which is handled through the University accounting system, Banner. The Funding section for projects is for recognizing the contributors for iCAP projects. There are only a handful of funding sources for iCAP projects, even though there are hundreds of projects. The highly detailed accounting is kept in the Banner system of record, and the iCAP Portal provides a summary by year and by funding source for the related project.

Creating Funding Sources

A funding source can be an organization, committee, or official group that provides funds for the completion of one or more projects. The following steps should be taken to add a funding source.

- One can add funding sources from the 'Administration' option, using the 'Funding Source' option under 'Add Content.'



- In the 'Title' field, type the name of the funding source, for example "Illinois Clean Energy Community Foundation (ICECF)."
- There are various kinds of funding sources:
  - Student Fees
  - Grant Funds
  - Institutional Funds
  - -External Funds
  - Donor Funds

    - Other

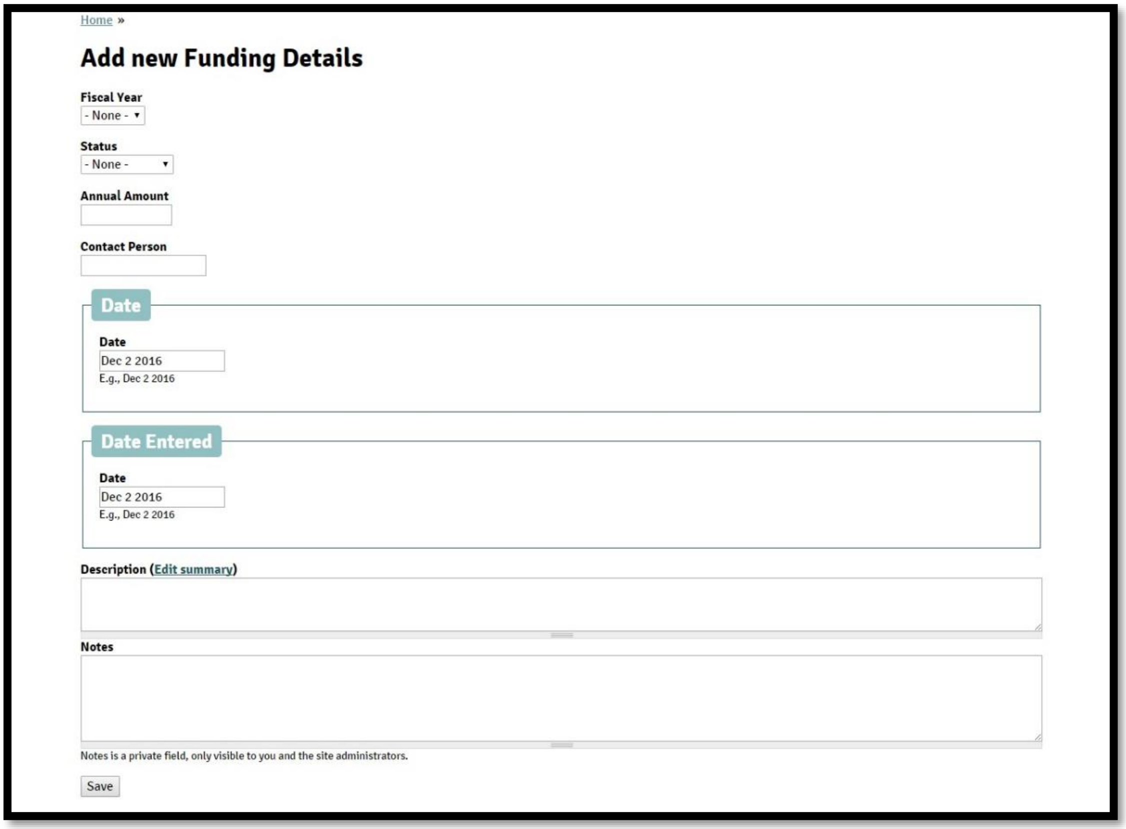
- ICECF is a granting agency; therefore, select 'Grant Funds' from the scroll down menu in the 'Funding Type' field.
- Any details typed in the 'Notes' field will not be visible to the Public. One can only see this detail when logged in to the iCAP Portal.
- Reference Numbers – This field is for general references for the Funding Source. For example, the University may have a customer number. It is not for a grant number from that Funding Source because those would be specific to the project that was funded.
- Describe the Funding Source and type in the 'Description' field. For ICECF, the description was pulled from their own website. "Providing financial support for clean energy projects in Illinois for over 15 years. The Illinois Clean Energy Community Foundation was established in December 1999 as an independent foundation with a $225 million endowment provided by Commonwealth Edison. Our mission is to improve energy efficiency, advance the development and use of renewable energy resources, and protect natural areas and wildlife habitat in communities all across Illinois."
- Similar to other items described in the iCAP Portal User Guide, 'Visibility' of the Funding Sources are set by default to 'Public.' You can, however, change the visibility by clicking 'Private' to restrict the general public (people without login access to the iCAP Portal) from viewing the details of the funding source.
- Click on 'Save'.

Following this you can go to specific projects and add the Funding Source for that project, using 'Add Existing Funding Source' on the 'Edit Project Funding Information' page and fill out all the details. Add this funding source to all the projects benefitting from it.

When you click on the Funding Source on a specific project's 'Edit Project Funding Information' page, another page with all the projects benefiting from the funds provided by this organization will open. For example, if you click on 'Illinois Clean Energy Community Foundation (ICECF),' you will see all the iCAP Projects that have been funded by ICECF. This list will contain the name of the project as the main heading. The fiscal year will be in the first column. The second column will contain the 'Approved amount' for the fiscal year, third column will have 'Spent amount', and the fourth column will show the 'Relinquished amount.' The bottom row will have the total for all FY's amount approved, spent, and relinquished. Along the rows, at the end, will have the 'View details' which will contain all the information regarding the project funding from this source sorted by the FY. The information will include the date funding was approved, contact person, any description or note, and date entered. This page will also have the other operation option – Edit/Delete.

Adding Funding Information to the Project

- To add funding details for a project, you have to click on the 'Edit Project Funding Information' option in the Administration box on the right hand corner of the project



  page. This will take you to the project funding page for the specific project. For example, if you click on the 'Edit Project Funding Information' on the 'Campus Bike Center' project, you will see this page:
- Under the Funding source, click on "Add".
  - Select the Fiscal Year from the drop down menu.
  - Select the status of the funding – Approved, Spent, or Relinquished.
  - The annual amount that will be provided.
  - Who is the Contact Person?
  - When was the funding approved, or spent, or relinquished?
  - When was the funding details entered in the iCAP Portal?
  - Write a short description about the funding detail, if necessary.
  - Write any notes, if required. The notes will not be visible to the public, and only authorized users will be able to view the notes.
- This will add the funding detail not only in the project's page, but also to the funding source's page.

Conclusion

Congratulations! Now you have a good knowledge about the iCAP Portal and how to do advanced tasks within the portal. Explore the website and learn more as you go. If you have any trouble regarding anything on the portal, consult the iCAP Administrators.