



Public Buildings Enhanced Energy Efficiency Program

2.4 Findings Workbook Guide

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1.0 Overview

The purpose of the Findings Workbook (FWB) is to function as the primary data collection tool for projects in the PBEEEP Program.

The FWB is comprised of multiple tabs to facilitate organization of the data collected.

This version of the FWB is an Excel 2003-based tool and is only intended for use with Excel 2003. Functionality in Excel 2007 has not been tested.

There are many background macros that operate within the workbook. These macros are not viewable to the end user, only the program.

2.0 Macros

NOTE: In order for the macros in this tool to work, the user must verify macro security settings will allow them to run.

To do this, go to Tools -> Macros -> Security.

The security setting, 'medium', should be selected. This setting will prompt the user to enable macros when the file loads.

Macros are procedures written in VBA code in the VBA Editor. The general purpose of the macros is to save time and automate procedures that would otherwise take many repetitive steps.

3.0 Description of FWB Worksheets

There are 10 worksheets in the FWB. Descriptions of each sheet are given below.

1. **Tips:** This sheet has brief instructions to Providers about the color coding of the cells, how to add/delete measures and notes on where they can enter extra data if they wish. The 'Tips' sheet is locked for editing when the workbook is 'Protected'.
2. **Project Overview:** This is where the majority of the Program data input occurs. Cells highlighted in yellow require input from the Program. There is a section for general project information, project contacts, pre- & post-energy use summaries, and utility energy rates & CO2 conversion rates. Many of the cells on this sheet are locked for editing; however, white, light grey & yellow cells can be manipulated. Providers should verify this data at the start of the project and update applicable fields as appropriate.
3. **PROGRESS:** This worksheet is not locked; cells B9 and C9 should be updated each time the Findings Workbook is submitted. This worksheet will be used as the Findings Workbook is passed back and forth for reviews to document the status of the project.
4. **Investigation Checklist:** This is where the Provider enters in information to demonstrate the comprehensiveness of their Investigation. Although the formatted cells are locked for editing, the data must be present in the white color-coded cells for each finding type by the end of the project; the majority will be filled in at the time of the mid-point review. The appropriate fields include but may not be limited to: relevant findings, finding location, reason for no relevant finding, and notes, where the Provider enters their specific data. The Provider completes the checklist as a documentation of the project scope completed and, if applicable, outstanding. The checklist includes links to the Findings Reference Worksheet.

5. **Findings Reference:** This sheet contains reference material on each finding type including the methods for identifying, documenting and calculating savings for each one. The Worksheet is formatted to be printed with one page per finding type. This sheet is locked
6. **Equipment List:** This is where the Provider enters in information about the equipment covered by the project. Providers will be required to fill in data in the white color-coded appropriate fields, which includes but may not be limited to the following: equipment tag, equipment type, equipment description/nameplate data, information on any VFDs, year installed, year upgraded, upgrade description, capacity, operating hours, location, and system / area serviced. The rows following the header row with column descriptions will be unlocked for editing, rows 9 and on. Rows 1-8 are locked.
7. **Attachments:** This is where the Provider enters the list of documents and calculation files that are being submitted for the project. The rows following the header row with column descriptions will be unlocked for editing. Attachments should be given names that reference the Findings Workbook number.
8. **Data Input:** This sheet is the main data input sheet for the Provider. All dark grey cells and column headers are locked for editing. A Findings Workbook should be used for **each** building.
9. **Investigation Summary:** This sheet is a summary output of the ‘Data Input’ tab, and the Program will use this summary to present investigation findings to the Owner. This summary may also be included in a Program report. All data on this sheet automatically populates from the ‘Data Input’ tab and the entire sheet is locked for editing.
10. **Implemented Measure Summary:** This sheet is a summary output of the ‘Data Input’ tab, and the Program will use this summary to present implementation results to the Owner. This summary may also be included in a Program report. All data on this sheet automatically populates from the ‘Data Input’ tab and the entire sheet is locked for editing.
11. **Non-Implemented Measure Summary:** This sheet is a summary output of the ‘Data Input’ tab, and the Program will use this summary to present implementation results to the Owner. This summary may also be included in a Program report. All data on this sheet automatically populates from the ‘Data Input’ tab and the entire sheet is locked for editing.

The State PBEEEP Findings Workbook should not be customized. The version provided by the Program must be used in your reporting that is done through WorkZone.

4.0 Contact Information

Please contact Mark Hancock with any technical questions:

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