EVOSS

End-User Guide for Agency

Version: 1.0
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Table of Contents

1   OVERVIEW

1.1   PAGE ELEMENT

The **Home page** is the public facing page of EVOSS. It contains links to publicly available information that everyone can access.

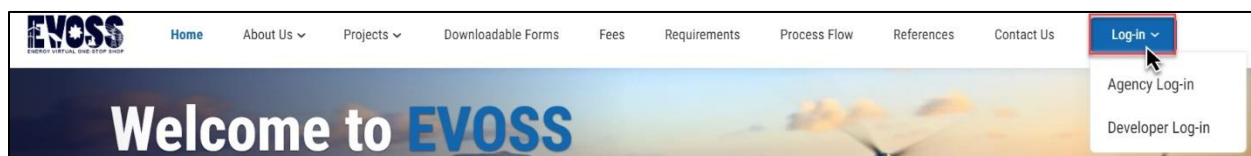| Module/Element	Description
Home	The section where display the banner, number of records and agency partner.
About Us	-
• About Us	Page that explains the purpose of the EVOSS and the milestone of the EVOSS Act.
• Scope	Page that explains the scope of the EVOSS application.
• Functions	Page that explains the function of the EVOSS application.
• Characteristics	Page explains the characteristics of the EVOSS application.
Projects	-
• Awarded RE Project	The section that contains the list of the awarded projects by technology
• Power Projects	It was categorized by existing power projects and Private Sector Initiated Project.
Downloadable Forms	The section that contains files that can be downloaded from EVOSS.
Fees	The section that displays the list of Fees.
Requirements	The section that displays the list of the Checklist of Requirements from each agency.
Process Flow	The section that displays the list of the Process Flow from each agency.
References	The section displays all reference documents such as presentation materials.
Contact Us	The section that display the contact details of the agency and an area where can create inquiry/concern.

1.2 ACCESS THE APPLICATION

To Log-in:

Step 1: Open a web browser *(Internet Explorer, Google Chrome or Mozilla Firefox)* at the address bar enter the MPIS web address. *(Recommended to use in Google Chrome)*
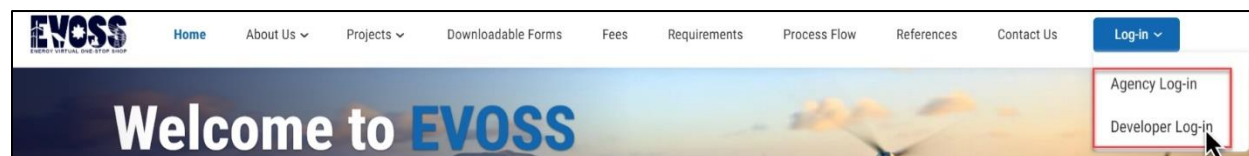
Step 2: Select Log-in option.

Step 3: Select if you are an Agency or Developer user.
　　　　2.1: Click the **Agency Log In** to log in as a **designated representative** of your office
　　　　2.2: Click the **Developer Log In** to log in as a **designated representative** of a private company.

Step 4: Key username and password.

Step 5: To successfully open the application, click on **Log In** button then the main application page will display.

To Log-out:

Step 1: From the EVOSS application, click on **Log Off** in global parameter.
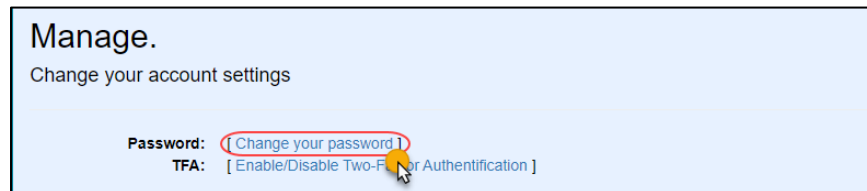
NOTE:
1. Always log-off properly to avoid having your account locked-out.
2. Once locked-out, wait for **approximately 20min** before logging-in again

To Change Password:

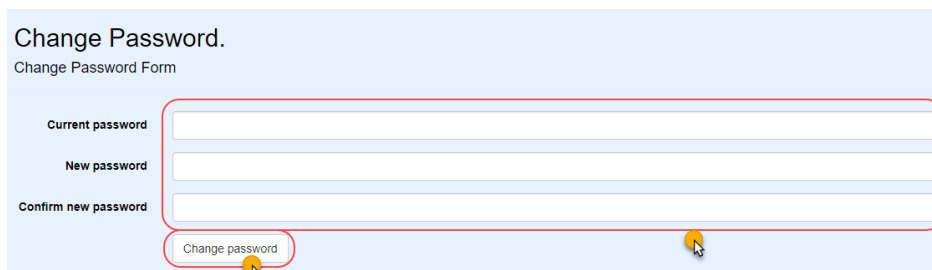**Step 1:** Click the **username**.

Step 2: Click on **Change Your Password** hyperlink and user will redirect to the change password page.

Step 3: Fill the fields and click on **Change Password** button.
a. Current Password – specify the existing password.
b. New Password – specify the preferred new password.
c. Confirm New Password – re type the new password.

NOTE:
Password Complexity:
- Passwords must have at least one special character (example: #,@,&)
- Passwords must have at least one digit ("0" – "9")
- Passwords must have at least one lowercase letter ("a" – "z")
- Passwords must have at least one uppercase ("A" – "Z")

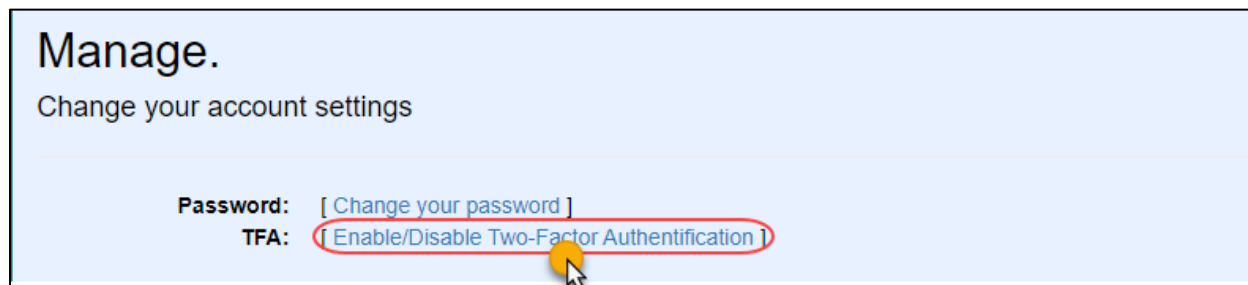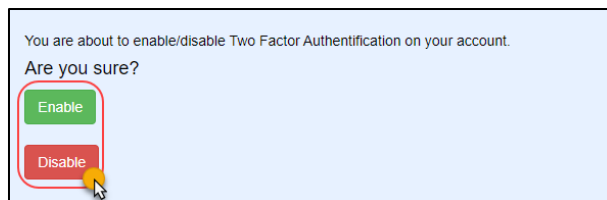**Two Factor Authentication:**

Step 1: Click the **username**.

Step 2: Click on **Enable/Disable Two-Factor Authentication** hyperlink and user will redirect to the two factor settings page.

Step 3: To enable the settings upon log-in, click on **Enable** button otherwise **Disable** button.

NOTE:
- Note if the enable is activated – user will need to confirm the log-in confirmation via email or SMS.
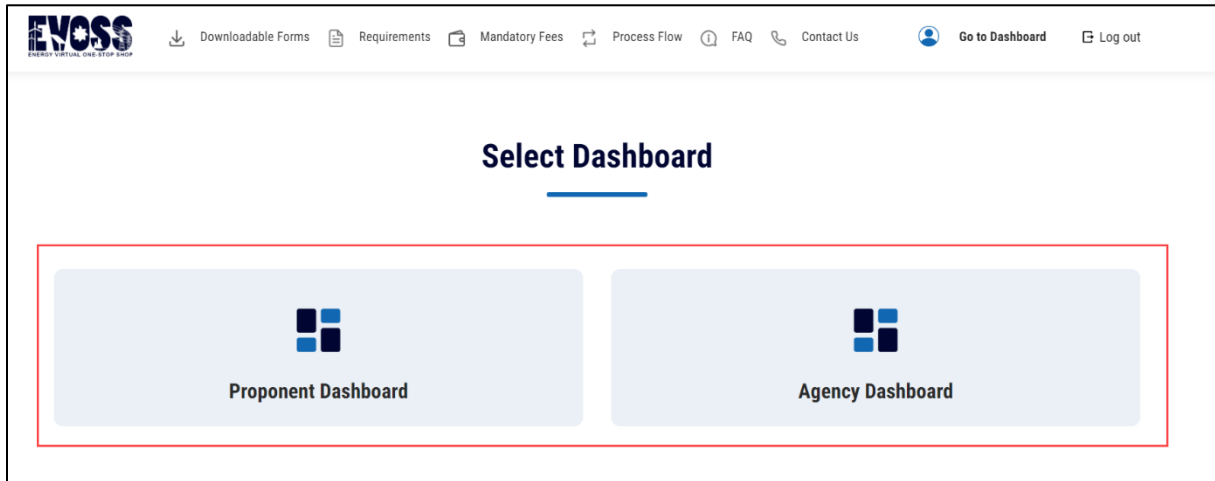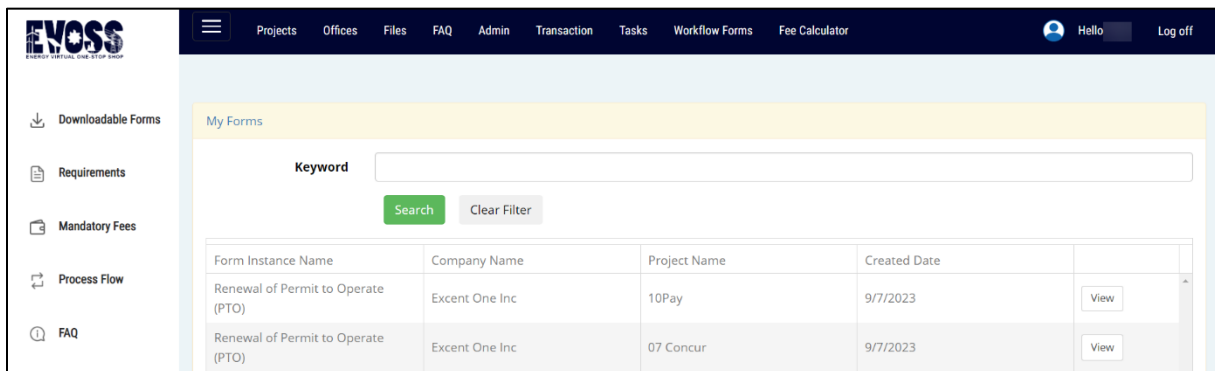
2   DASHBOARD

Step 1: Select the dashboard based on the role.

- Developer Dashboard – dashboard for the proponents.
- Agency Dashboard – dashboard for Agency and Admin

Step 2: Upon successful select of dashboard it will redirect to main dashboard.

NOTE:
- The items that are mark orange on the grid are already ended. Status maybe approved, disapproved, duplicate, and withdraw.
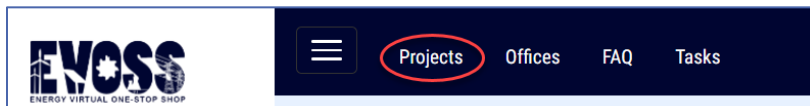
3   MAIN MODULES
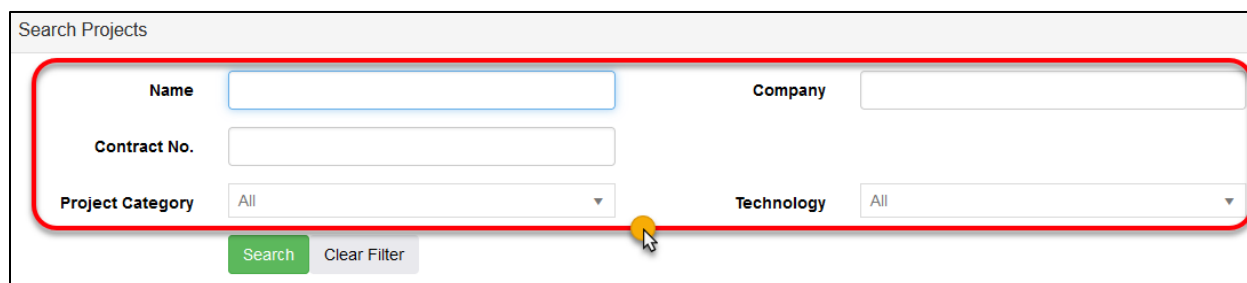
3.1   PROJECT

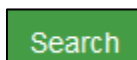#### 3.1.1   ACCESS/SEARCH PROJECT

Access

Step 1: From the main application window, click on **Project** on the global navigation bar.

Step 2: Fill in preferred search parameter.

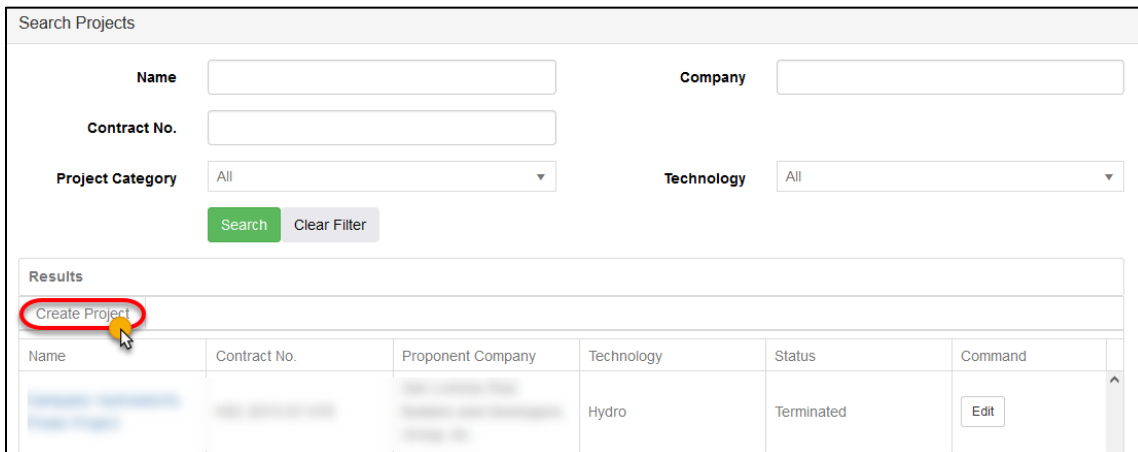**Step 3**: Click on **Search** button.

> **NOTE:**
> a.   Not all projects will display on the results table. Record that will display is based on tag company to the user and the projects associated to the company.
> b.   Project will display even if the user is not associated in the company if it was manually tag to project. (this is based on 5.1.17) Associate project to user.
> c.   Agencies can view all the projects listed in the EVOSS system

3.1.1.1   CREATE PROJECT

Step 1: From the project page, click on **Create Project** button.

Step 2: Fill in all the required fields. Note (fields depends on technology type)

Step 3: Click on submit button to add the record. Once click added record will display on results table.

3.1.1.2   UPDATE PROJECT

Step 1: From the project page, search for the record that will update and click on **edit** button.

Alternatively, user can click the **name hyperlink** and click on **edit** button.

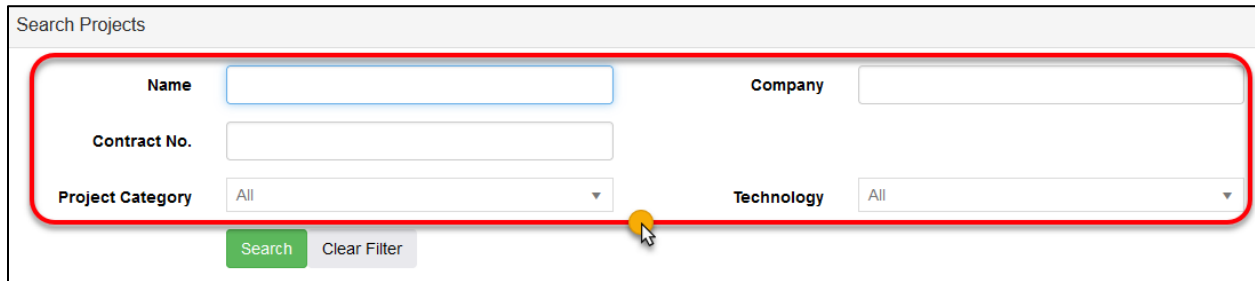**Step 2:** Update the record and click on **submit** button.

> **NOTE:**
> a. The DEVELOPERS or PROJECT PROPONENTS cannot edit the PROJECT DETAILS. These can only be edited by the DOE focal persons.

3.1.1.3 APPLICATION/FORM INSTANCE TAG TO THE PROJECT

Step 1: From the project page, search for project record.

Step 2: Click on **Project name** hyperlink.

Step 3: From project display page, scroll down up to Form Instance section.

Step 4. To check the details of the submitted application/workflow, click on **view** button.

Form Instance					
Title	Created By	Date Submitted	Date Last Modified	Status	Command
Assignment or Transfer of RE Contract	User 1, User 1	12/2/2021	12/2/2021	For Checking of Completeness	View
Checklist of Requirements for the LOE to PNP	User 1, User 1	11/18/2021	11/18/2021	Withdrawn	View

3.1.1.4   DELIVERABLE CREATED BASED ON WORKFLOW

Step 1: From the project page, search for project record.

Search Projects				
Name		**Company**		
Contract No.				
Project Category	All	**Technology**	All	
	Search Clear Filter			

Step 2: Click on **Project name** hyperlink.

Name	Contract No.	Proponent Company	Technology	Status	Command
Power Project		Group, Inc.			Edit

Step 3: From project display page, scroll down up to Deliverable Status section.

Deliverable Status				
Add Deliverable				
Deliverable	Office Name	Calendar Days Elapsed (Agen...	Office Status	Command
Letter of Endorsement to PNP	Office of the Department of Energy	0	Withdrawn	
Renewable Energy Payment Agreement	FIT-ALL Fund Administration Division (FFAD)	0	Pending Proponent	

Step 4: To check the deliverable logs, click on **deliverable** hyperlink.

Deliverable Status				
Add Deliverable				
Deliverable	Office Name	Calendar Days Elapsed (Agen...	Office Status	Command
Letter of Endorsement to PNP	Office of the Department of Energy	0	Withdrawn	
Renewable Energy Payment Agreement	FIT-ALL Fund Administration Division (FFAD)	0	Pending Proponent	

Step 5: Scroll the page to check the deliverable logs details.

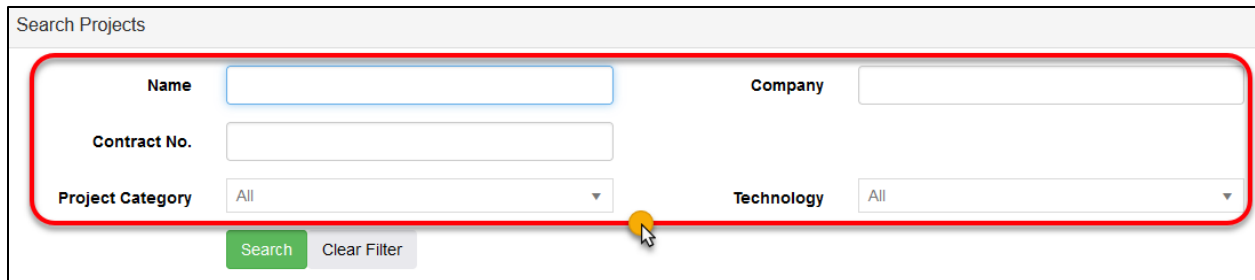| RE PROJECT 1			
Deliverable	Special Tree Cutting Permit	**Office Name**	Office of the National Water Resources Board
Project Name	RE PROJECT 1	**Office Status**	Completed
Date Started	8/24/2021 01:26	**Date Approved**	9/09/2021 02:03
Total Days Elapsed	11	**Total Calendar Days Elapsed**	16
Total Days Elapsed with Proponent	0	**Total Calendar Days Elapsed with Proponent**	0
Working Days From Started to Approved	11	**Calendar Days From Started to Approved**	16
Remarks			

NOTE:

a. Calendar Days Elapse (Agency) is changing per day basis. It changes color from white, green, orange, red.
  - White – newly create deliverable
  - Green – days elapse was still on track.
  - Orange – warning sign the days elapse is going to critical stage (due days)
  - Red – Day's elapse was past due.

b. Admin can add and update deliverable status but should not always use. It was only use for emergency purposes since deliverable was creating and updating via workflow.

3.1.1.5   UPDATE PROJECT STATUS

Step 1: From the project page, search for project record.

Step 2: Click on **Project name** hyperlink.

Step 3: From project display page, scroll down up to bottom part and click on **Update Project Status** button.

Step 4: Update the details and click on submit button.

3.1.1.6   ASSOCIATE PROJECT TO USER

Step 1: From the project page, search for project record.

Step 2: Click on **Project name** hyperlink.

Step 3: From project display page, scroll down up to bottom part and click on **edit Users** button.

Step 4: Click the **Add Row** button and select the **user** on the dropdown list. (Repeat the step until add all the users)

Step 5: Key in **remarks** and click in **submit** button.
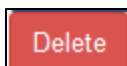

3.1.1.7 DELETE PROJECT

Step 1: From the project page, search for project record.

Step 2: Click on **Project name** hyperlink.

Step 3: From project display page, scroll down up to bottom part and click on **Delete** button.

Step 4: Scroll down the page up to bottom part **t**o confirm the deletion. Click on **Confirm delete** button.
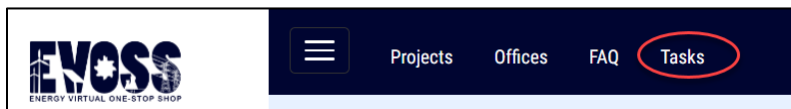
Confirm Delete

> **NOTE:**
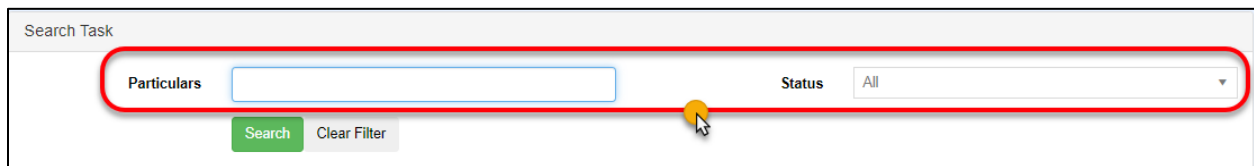> a. Deleting project is not recommended but will use for emergency update.

3.2   TASK

3.2.1   ACCESS/SEARCH TASK LIST

Step 1: From the main application window, click on **Tasks** on the global navigation bar.

Projects   Offices   FAQ   Tasks

Step 2: From the task page key in details on the Search bar particulars, type in the key words of the task such as Project Name, Company Name, Application Type and Action. User may also use another search parameter.

Search Task

| Particulars | | Status | All |

Search   Clear Filter

Step 3: Click on **search** button.

Search

> **NOTE:**
> 1. **Status Type:**
>   - Available – indicates a new task/submission
>   - Open – indicates the user must act on the task
>   - Done – indicates that the task is already completed

3.2.2   TAKE ACTION ON THE TASK

Step 1: From the task page there are two options to open/check the record:
- **View** to display the entire details of the application.
- **Open** to comply with the task required from the user

Step 2: Upon click on open button check the details. If the task is for checking of completeness/rectify to applicant. Approver has an option to mark check the correct document. (Skip if not necessary)

NOTE:
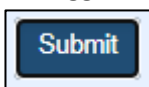   a.   If the confirmation check box has mark. Proponent cannot be able to update the document once it was return/rectified to them.

Step 3: Scroll down to the bottom part. Select the action to be taken. (Note: Each action has different value based on the task)

Step 4: Key in details on the remarks field.

Step 5: To trigger the action taken, click on **submit** button.

Step 6: To confirm the action, click on **OK** button and confirmation message will display. (Next task will be created)

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NOTE:

a. To check the remarks of the approver/applicant go to Logs Section and click to display the logs table.

Logs				
Logs				
Folio	Remarks	Action	Username	Log Date
Start	Automated: Initialize Workflow.	Start		12/29/2021 01:29

3.2.3   DEEMED COMPLETE/APPROVED

Note: If the approver did not take an action on the specified time. Application will automatically tag as Deemed Complete or Deemed Approve.

Deemed Complete:

☐	Auto-Attachments
	Existing Attachments
	DeemedComplete.pdf

1/4/2022

CERTIFICATION OF DEEMED COMPLETE SUBMISSION

This document was generated by the Energy Virtual One-Stop Shop (EVOSS) System as an attestation that all documentary requirements necessary for the **Department of Energy** to issue the **Approved Application for Request for Reconsideration** for the **Dropdown Select Project** of ▮▮▮▮▮▮▮▮▮ **Energy Systems, Inc.** are deemed complete, pursuant to Republic Act No. 11234 as implemented by the EVOSS Steering Committee Resolution No. 2021-02-002 and applicable laws, rules and regulations.

The **Department of Energy** shall evaluate the application for the **Approved Application for Request for Reconsideration** in accordance with the applicable period as stated in RA11234 counted from the date of this Certification.

This is an electronically generated document, hence does not require a signature.

Deemed Approve:

3.2.4 DOWNLOAD ATTACHMENT

Multiple Download

Step 1: From the task page key click on **open** button.

Step 2: Scroll down to bottom part and click on **Download All Attachment** button.

Individual Download

Step 1: From the task page key click on **open** button.

RE PROJECT 1 - [...] (BATELEC II) - Special Tree Cutting Permit - Conduct the site inspection	1/8/2022 8:55 AM		1/12/2022	Available	Open	View

Step 2: In checklist field, click the **name hyperlink** of the attachments.

☑	1. Letter of Request

Existing Attachments
1.docx

☑	2. Supporting documents to the justification on grounds for termination

Existing Attachments
1.pdf

Select File to Download

Step 1: From the task page key click on **open** button.

RE PROJECT 1 - [...] (BATELEC II) - Special Tree Cutting Permit - Conduct the site inspection	1/8/2022 8:55 AM		1/12/2022	Available	Open	View

Step 2: Scroll down to bottom part and click on **Select File to Download** button.
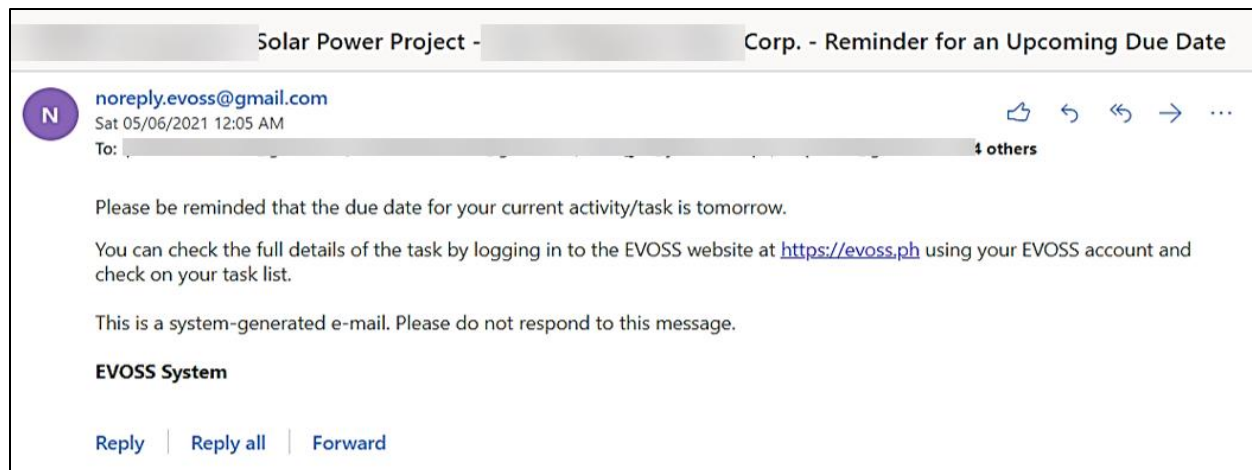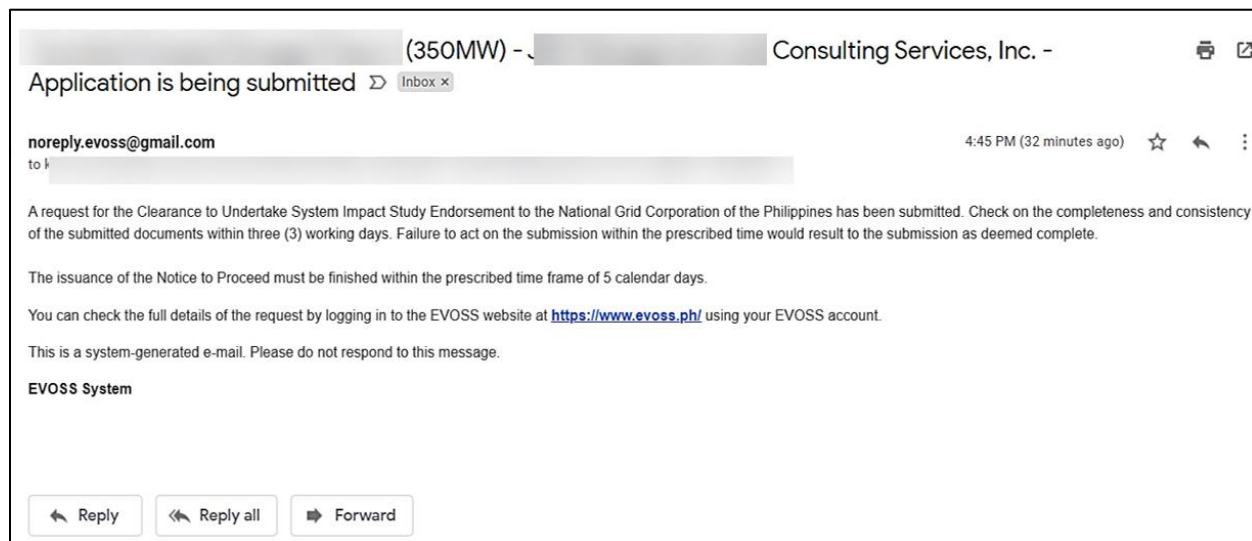
Select file to Download

> **NOTE:**
> a. Some document will automatically download like document, excel, text, images while PDF will open a tab on the web browser and user will click the download button.

3.2.5 SMS/EMAIL NOTIFICATION

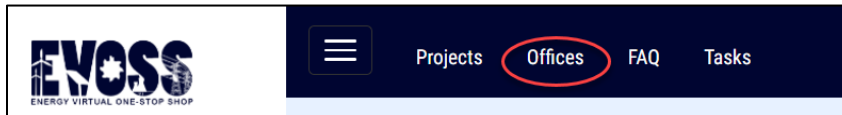**Note:** Applicant/Approver will receive email/SMS notification based on the configuration. Sample email below.

3.3   OFFICE

3.3.1   OFFICE

3.3.1.1   ACCESS/SEARCH OFFICE

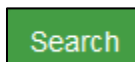**Step 1:** From the main application window, click on **Offices** on the global navigation bar.

Step 2: Fill in preferred search parameter.

Step 3: Click on **Search** button.

> **NOTE:**
> a. Active - deliverables that are still on going. Status may be (pending proponent, Other Offices) or simply tag to the other office.
> b. Pending – deliverables that are still on going. Status may be (In Progress) in the current office.
> c. Overdue – calendar days elapse is greater than deliverable days.
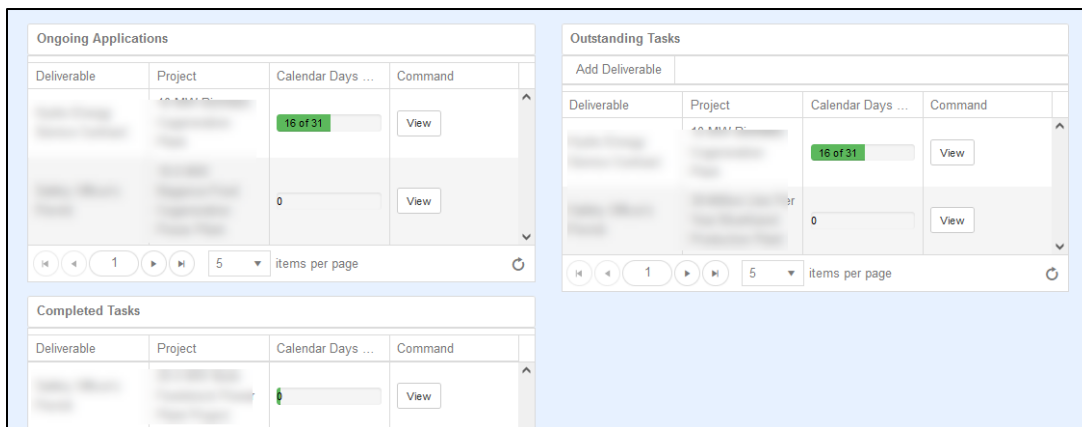> d. Completed – deliverable that is ended already. Status may be (Approved, Disapproved)

3.3.1.2 DASHBOARD FOR DELIVERABLES

Step 1: From the offices main page, click the **Agency name** hyperlink.

Step 2: Dashboard is separated to 3 section (On Going Application, Outstanding Task and Completed Task).

Step 3. To check the details of the application/workflow, click on **view** button.

> **NOTE:**
> a. Details on the page vary on the type of application or based on selected workflow.