

# eTRM Custom Measures

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Design | Version 2.1 | 03/31/2023

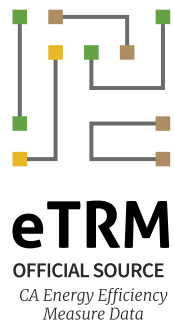
This “Phase 1” of eTRM development for Custom creates a new measure type – Custom Measures – to host custom measure information (e.g., custom measure characterizations, savings calculation methods, etc.) and a library of custom tools for use in calculating custom measure savings. These developments focus on the eTRM as a source for calculation guidance and tools for custom measures; they do NOT include any functions related to intake, storage, or tracking of site-specific data.

Custom Measures are a type of measure that do not have pre-calculated savings values but instead document data requirements and calculation methods to determine energy savings when a custom project is implemented.

This document outlines the supporting views and functionality for this new type of measure in eTRM.



# Custom Library View



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# Custom Library

## Calculation Tools

Calculation tools are files used to calculate savings for custom measures.

### Boiler Load Balance and Scorecard Tool

Excel workbook to determine boiler load factor

### Chiller Workbook

To be used in measures related to chiller system upgrades

### DOE MEASUR Calculators

External weblink to DOE's suite of MEASUR calculators

### HVAC Tool

Excel workbook for calculating savings for multiple HVAC measures on CHW, HW, and air-side systems (also known as the PG&E HVAC Tool)

## Templates

Templates are resources to help with the development of projects, studies, and reports.

### Project Feasibility Study Template, version 1.0

This document is a template for implementers to use and fill out in describing a feasibility study to be submitted to the CPUC.

### Post Installation Summary Report, v1.0

This document is a template for implementers/project developers to use and fill out as the post-installation report that is to be submitted...

The Custom Library is a new section in the eTRM that lists all custom tools.

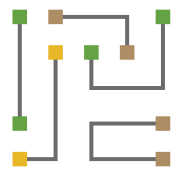
Project developers may click on each name (hyperlink text in green) to navigate to each tool's detail view, where they can read the tool's description, view its version history, view linked custom measures, and download the tool for their custom project.

The versioning, editing, and access controls of custom tools are identical to other eTRM Shared Data objects.

Custom tools are shown grouped by type. Each column is one type of tool listed in alphabetical order, with a description of up to two lines of text.

Admin users may manage custom tools in Admin Central

# Custom Tool Detail View



**eTRM**  
OFFICIAL SOURCE  
CA Energy Efficiency  
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# Chiller Workbook

DETAILS **DEPENDENCIES** SUBSCRIPTIONS

## TYPE

Calculation Tool

## DESCRIPTION

To be used in measures related to chiller system upgrades.

## SOURCE DESCRIPTION

This tool is managed by eQuest. This version is eQuest365-5678 and was published 01/01/2023. Visit the [developer's source](#) for more information.

## EFFECTIVE START DATE

Jun 1, 2023

Version and status

Name **CONFIGURE**

## DOWNLOAD

**Chiller Workbook v002-01**  
CALCULATION TOOL : XLSX / 12 MB

The custom tool download button appears the same in all views of the eTRM. It displays the name, version, custom tool type, file type, and file size. Selecting it downloads the file.

A custom tool's detail page lists the type, description, source description, effective start date, and effective end date (if present)

Tab content:  
  
Dependencies tab allows the user to view all downward dependencies, i.e. all the eTRM objects that depend on this custom tool  
  
Subscriptions tab allows the user to subscribe to announcements related to this custom tool



# Custom Measure View



A Custom Measure has the same appearance as a Deemed Measure

Custom Measures are distinguished from Deemed Measures by the Measure ID (beginning with CM) and the Measure Type (see below)

Measures Type is a new piece of data in the Measure Details

Deemed Measures will also have this new piece of data, in that case the type being "Deemed"

CMAP001-01 | Dec 1, 2022 1:00 PM

[Version History](#)

# Chiller System Upgrade

- CHARACTERIZATION**
- DEPENDENCIES
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## Measure Details

<b>MEASURE TYPE</b> Custom	<b>SOURCE DESCRIPTION</b> CMAP001-01-1
<b>MEASURE ID</b> CMAP001	<b>USE CATEGORY</b> AP - Appliance or Plug Load
<b>MEASURE NAME</b> Chiller System Upgrade	<b>EFFECTIVE DATE</b> January 1, 2023
<b>PA LEAD</b> SDG&E	

## Measure Package

The Measure Package includes: CSV files of parameters, value tables, permutation table and reference files, a PDF of the characterization, as well as the measure JSON file (JavaScript Object Notation, a text file format used for structured data).

[Download Measure](#)

Or you can download a PDF of the characterization only, separate from the full Measure Package.

**Characterization**

PDF

## Table of Contents

Technology Summary	Electric Savings (kWh)	Measure Case Labor Cost
Measure Case Description	Peak Electric Demand Reduction (kW)	Net-to-Gross
Base Case Description	Gas Savings (Therms)	Gross Realization Rate (GRR)
Code Requirements	Life Cycle	Non-Energy Impacts
Program Requirements	Base Case Material Cost	DEER Differences Analysis
Program Exclusions	Measure Case Material Cost	
Data Collection Requirements	Base Case Labor Cost	

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# Importing a Custom Tool into a Custom Measure

Measure Developers may add custom tools by importing them from the Custom Library

 **RELEASE ASSIGNMENT**

You are now assigned to this measure. No other user will be permitted to make edits until you release it.



**DRAFT**

Dec 1, 2022 3:48 PM



[Version History](#)

[Measure Log](#)

**eTRM**

OFFICIAL SOURCE  
CA Energy Efficiency  
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# Chiller System Upgrade



CHARACTERIZATION

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## Upward

### SHARED MEASURE PARAMETERS

Building HVAC



v010 CPUC APPROVED



Version history

Building Location



v010 DRAFT



Version history

Building Type



v010 DRAFT



Version history

IMPORT A SHARED PARAMETER

### SHARED VALUE TABLES

Constants



v010 DRAFT



Version history

Effective Useful Life and  
Remaining Useful Life



v010 DRAFT



Version history

IMPORT A SHARED VALUE TABLE

### CUSTOM TOOLS

This measure does not contain any custom tools.

IMPORT A CUSTOM TOOL



Base users would see this view as read-only, with no import buttons

The Measure Developer chooses from a list of all custom tools



**RELEASE ASSIGNMENT** You are now as  
**DRAFT** Dec 1, 2022 3:48

# Chiller System

**CHARACTERIZATION** DEPENDENCIES

## Upward

### SHARED MEASURE PARAMETER

Building HVAC

Building Location

Building Type

**IMPORT A SHARED PARAMETER**

### SHARED VALUE TABLES

Constants

Effective Useful Life and Remaining Useful Life

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SELECT A

## Custom Tool

TITLE	DESCRIPTION	TYPE	LAST UPDATED
<b>P</b> <a href="#">Boiler Load Balance and Scorecard Tool</a>	Excel workbook to determine boiler load factor	Calculation Tool	Jan 1, 2023
<b>P</b> <a href="#">Chiller Workbook</a> <b>CHOOSE</b> <span>✕</span>	in measures related to chiller system...	Calculation Tool	Jan 15, 2023
<b>P</b> <a href="#">DOE MEASUR Calculators</a>	External weblink to DOE's suite of MEASUR...	Calculation Tool	Jan 5, 2023
<b>P</b> <a href="#">HVAC Tool</a>	Excel workbook for calculating savings for multipl...	Calculation Tool	Jan 1, 2023
<b>P</b> <a href="#">Project Feasibility Study Template, version 1.0</a>	This document is a template for implementers to use and fill out in describing a feasibility study to...	Template	Jan 1, 2023
<b>P</b> <a href="#">Post Installation Summary Report, v1.0</a>	This document is a template for implementers/project developers to use and fill out as the post-...	Template	Jan 1, 2023

**Choose**

Cancel

Then chooses which version of the custom tool to import

RELEASE ASSIGNMENT You are now as  
DRAFT Dec 1, 2022 3:48

# Chiller System

CHARACTERIZATION DEPENDENCIES

## Upward

### SHARED MEASURE PARAMETER

Building HVAC

Building Location

Building Type

IMPORT A SHARED PARAMETER

### SHARED VALUE TABLES

Constants

Effective Useful Life and Remaining Useful Life

#### CHOOSE A CUSTOM TOOL VERSION

# Chiller Workbook

VERSION ID	STATUS	CHANGE DESCRIPTION
<b>P</b> chillerWorkbook-002-01	Published	Short description of this change
<b>P</b> chillerWorkbook-001-01	Draft	Short description of this change

**CHOOSE** X

Choose

Cancel

The custom tool is now available within the measure

**RELEASE ASSIGNMENT** You are now assigned to this measure. No other user will be permitted to make edits until you release it.

**eTRM**  
OFFICIAL SOURCE  
CA Energy Efficiency Measure Data

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# Chiller System Upgrade

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## Upward

### SHARED MEASURE PARAMETERS

Building HVAC	 v010 CPUC APPROVED	 Version history
Building Location	 v010 DRAFT	 Version history
Building Type	 v010 DRAFT	 Version history

IMPORT A SHARED PARAMETER

### SHARED VALUE TABLES

Constants	 v010 DRAFT	 Version history
Effective Useful Life and Remaining Useful Life	 v010 DRAFT	 Version history

IMPORT A SHARED VALUE TABLE

### CUSTOM TOOLS

Chiller Workbook	 v002-01 CPUC APPROVED	 Version history
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IMPORT A CUSTOM TOOL

This icon next to Version History indicates the status of the imported version

Green means the version is up-to-date and is the latest published in the eTRM



Yellow means the version is out-of-date and there is a more recent version that has been published in the eTRM

Custom tool name, shown in green, is a link to the custom tool's details page

Icon button allows user to change version of linked custom tool, or remove it

Version and status

Version history displays custom tool's versions panel

 v001-01 DRAFT  Version history

# Custom Tools in Calculations

Custom tools added to a Custom Measure are listed in the Calculations tab

 **RELEASE ASSIGNMENT**

You are now assigned to this measure. No other user will be permitted to make edits until you release it.

**eTRM**  
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# Chiller System Upgrade



-  CHARACTERIZATION
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## Custom Tools

REORDER CUSTOM TOOLS

 **Chiller Workbook**  
To be used in measures related to chiller system upgrades

 **Chiller Workbook v002-01**  
CALCULATION TOOL : XLSX / 12 MB

Name in green is a link to the custom tool details page

Description

Download button

The version icon follows the same color-coding as on the Dependencies tab: green is up-to-date, yellow is out-of-date

## Calculations

Calculations are the primary mechanism for eTRM to convert input values (e.g., hours of use, efficiency factors, load factor, material and labor costs) into useful output values including energy savings, natural gas impacts, and incremental measure costs. Calculations are performed serially, starting with the first equation on this page and progressing down until all equations are done. Measures with savings determined via simulation modeling generally have limited or no savings equations here; more information regarding savings approaches can be found on the **Characterization** tab for this measure.

**ADD CALCULATION**

REORDER CALCULATIONS

## Multifamily Common Area Scaling Factor in ratio

CONFIGURE 

VALIDITY	EQUATION (RATIO)
	$\frac{constCycles\_MFm}{constCycles\_single}$



# Including a Custom Tool in a Characterization



Upon save, the custom tool is visible within the characterization section

**RELEASE ASSIGNMENT** You are now assigned to this measure. No other user will be permitted to make edits until you release it.

**eTRM**  
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**DRAFT** Dec 1, 2022 1:00 PM [Version History](#) [Measure Log](#)

# Chiller System Upgrade



- CHARACTERIZATION**
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## Measure Details

<b>MEASURE TYPE</b> Custom	<b>SOURCE DESCRIPTION</b> CMAPO01-01-1
<b>MEASURE ID</b> CMAPO01	<b>USE CATEGORY</b> AP - Appliance or Plug Load
<b>MEASURE NAME</b> Chiller System Upgrade	<b>EFFECTIVE DATE</b> January 1, 2023
<b>PA LEAD</b> SDG&E	

## Measure Package

The Measure Package includes: CSV files of parameters, value tables, permutation table and reference files, a PDF of the characterization, as well as the measure JSON file (JavaScript Object Notation, a text file format used for structured data).

[Download Measure](#)

Or you can download a PDF of the characterization only, separate from the full Measure Package.

**Characterization**  
PDF

## Table of Contents

- Technology Summary
- Measure Case Description
- Base Case Description
- Code Requirements
- Program Requirements
- Program Exclusions
- Data Collection Requirements
- Electric Savings (kWh)
- Peak Electric Demand Reduction (kW)
- Gas Savings (Therms)
- Life Cycle
- Base Case Material Cost
- Measure Case Material Cost
- Base Case Labor Cost
- Measure Case Labor Cost
- Net-to-Gross
- Gross Realization Rate (GRR)
- Non-Energy Impacts
- DEER Differences Analysis

## Technology Summary

### Chiller Workbook

To be used in measures related to chiller system upgrades

**Chiller Workbook v002-01**  
CALCULATION TOOL : XLSX / 12 MB

Custom tool name links to the custom tool details page. Icon color indicates version status (green for up-to-date, yellow for out-of-date).

Description

Download button

## Measure Case Description



Base users would see this view as read-only, with no edit functions

## Base Case Description

# Building Permutations

Permutations are configured in the same way as other measures, from the configure option on the permutations tab

 **RELEASE ASSIGNMENT** *You are now assigned to this measure. No other user will be permitted to make edits until you release it.*


 **DRAFT** Dec 1, 2022 3:48 PM  [Version History](#) [Measure Log](#)


# Chiller System Upgrade



-  **CHARACTERIZATION**
- DEPENDENCIES**
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No permutations have been built for this measure.

**CONFIGURE** 

Configure fields 

Custom Measures do not have Shared Reports, Custom Reports, Other Reports, or CET Integrations



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Custom Measures are subject to a reduced data spec compliance requirement, which affects permutation configuration

## CONFIGURE PERMUTATION FIELDS

# Chiller System Upgrade #CMAP001

Data spec fields

Additional fields

### PERMUTATION CHARACTERIZATION

FIRST BASE CASE DESCRIPTION (STRING)

Not mapped

Please refer to the functional spec for specifics of the permutation configuration options

SECOND BASE CASE DESCRIPTION (STRING)

Not mapped

MEASURE CASE DESCRIPTION (STRING)

Not mapped

EXISTING DESCRIPTION (STRING)

Not mapped

STANDARD DESCRIPTION (STRING)

Not mapped

### COMMON MEASURE PARAMETERS

MEASURE APPLICATION TYPE (STRING)

Not mapped

BUILDING TYPE (STRING)

Save

Cancel

Delete

# Custom Measures in the eTRM

Custom Measures appear in the Measure Catalog (new tab)  
and Search Results

# Custom Measures in the Measure Catalog



Custom Measure are shown in a new tab in the Measure Catalog



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# Measure Catalog

DEEMED MEASURES

CUSTOM MEASURES

MEASURE REPORTS

The existing "Measures" tab has been renamed to "Deemed Measures" and a "Custom Measures" tab has been added

Find by keyword...



Add a Filter



1-5 of 5 measures



Starting row

1

Rows per page

25

Go

NAME ▲	MEASURE VERSION ID ▲	TYPE ▲	USE CATEGORY ▲	PUBLISHED ▲
Chiller System Upgrade	CMAP001-01	Custom	AP - Appliance or Plug Load	Dec 1, 2022
Custom Measure Name	CMAP002-01	Custom	AP - Appliance or Plug Load	Dec 5, 2022
Custom Measure Name	CMAP003-01	Custom	AP - Appliance or Plug Load	Dec 2, 2022
Custom Measure Name	CMAP004-01	Custom	AP - Appliance or Plug Load	Dec 1, 2022
Custom Measure Name	CMAP005-01	Custom	AP - Appliance or Plug Load	Dec 15, 2022



1-5 of 5 measures



Starting row

1

Rows per page

25

Go

# Custom Measures in Search Results

Custom Measure appear in search results distinguished by their ID



chiller



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## 6 SEARCH RESULTS

1-6 of 6 search results

### SWHC052-01: Air-Cooled Chiller, Path B

... **chiller** (s) to cool and distribute water that is used to cool air to meet building cooling demand. An air-cooled **chiller** rejects heat from the refrigeration cycle to the ambient air using fans (forced convection). Even though an air-cooled **chiller** is less efficient than a water-cooled **chiller**, it provides other advantages: lower first cost, lower maintenance ...

### CMAP001-01: Chiller System Upgrade Custom measure

... **chiller** (s) to cool and distribute water that is used to cool air to meet building cooling demand. An air-cooled **chiller** rejects heat from the refrigeration cycle to the ambient air using fans (forced convection). Even though an air-cooled **chiller** is less efficient than a water-cooled **chiller**, it provides other advantages: lower first cost, less complex ...

### SWHC005-02: Water-Cooled Chiller

... **chiller** are based on the unit operating under standard test conditions, normally determined by AHRI Standard 550/590 – 20163. Chillers have two different energy efficiency rated conditions: 1) full load efficiency (EER, kWh/ton) and 2) part load efficiency (integrated part load value (IPLV)). The measure case is defined as a variable speed water-cooled **chiller** for use in nonresidential buildings ...

### SWHC008-01: Variable Speed Drive for a Central Plant System

... **chiller** and circulating this chilled water through a chilled water coil in an air handler or throughout the building zones. A **chiller** is either air-



# Creating a Custom Tool

An admin user may create a new custom tool by selecting "Manage custom tools", then selecting "Create".

The Manage custom tools panel has the same appearance and functionality as the Manage shared parameters panel.

# eTRM Management

## CONTENT

### Measures

The primary object in eTRM, comprising all content needed to develop a regulated measure and build its permutations.

[Manage measures](#)

[Manage archived measures](#)

### Shared Parameters

Parameters are used to characterize individual measure permutations that qualify energy savings and (in some cases) costs. Shared parameters are those that are used by multiple measures in the eTRM.

[Manage shared parameters](#)

### Custom Library

A library of tools and resources for use with Custom Measures.

[Manage custom tools](#)



### References

A library of authoritative information sources which can be cited by assorted objects throughout eTRM.

[Manage references](#)

### Shared Value Tables

Value tables are used to assign specific numeric values to equations as well as to define values relevant to measure tracking and reporting. Shared value tables are used by multiple measures in the eTRM.

[Manage shared value tables](#)



Custom tools require all fields marked with a red asterisk

Custom tool type may be one of the following:

- Calculation Tool
- Template
- Other

CREATE A NEW

# Custom Tool

Basic

Source

TYPE\*

Calculation Tool

TITLE\*

Chiller Workbook

DESCRIPTION\*

**B I** :≡ ≡≡ 🔗 🗨 Normal | I<sub>x</sub> 📄 Source

To be used in measures related to chiller system upgrades

body p

STATUS\*

Draft

EFFECTIVE START DATE\*

01-06-2023

EFFECTIVE END DATE

Save

Cancel



Custom tools require a source of a file or external URL

If a custom tool's source is a file, a compatible file type must be uploaded

If a custom tool's source is a file, a compatible file type must be uploaded

CREATE A NEW

# Custom Tool

● Basic

Source

## SOURCE DESCRIPTION

**B I** :≡ ¶ ≡ ≡ ≡ Normal | I<sub>x</sub> ↕ Source

body p

*Optional information about third-party developers and/or versioning of this tool*

## SOURCE\*

- File Import
- External Link

## CHOOSE FILE TO IMPORT

chiller\_workbook.xlsx

*Allowed file formats are: Excel (.xlsx, .xlsb, .xlsm), Word (.docx), ZIP, or PDF*

Save

Cancel



Custom tools require a source of a file or external URL

The user may optionally include information about the source of this tool, including external links and version details

If a custom tool's source is a link, the required information is a URL rather than a file

CREATE A NEW

# Custom Tool

● Basic

Source

SOURCE DESCRIPTION

**B I** :≡ ¶ ≡ ≡ | Normal ▾ | I<sub>x</sub> ↕ Source

body p

*Optional information about third-party developers and/or versioning of this tool*

SOURCE\*

- File Import
- External Link

URL\*

https://externalsource.com/path/to/calculation-tool.xlsx

Save

Cancel

Newly created custom tools first appear as an unpublished draft. In order to be published and visible to all eTRM users the draft must be committed on the custom tool's detail page.



MANAGE

# Custom Tools

Create

TITLE	DESCRIPTION	TYPE	LAST UPDATED
<b>P</b> <a href="#">Boiler Load Balance and Scorecard Tool</a>	Excel workbook to determine boiler load factor	Calculation Tool	Jan 1, 2023
<a href="#">Chiller Workbook</a>	To be used in measures related to chiller system...	Calculation Tool	Jan 15, 2023
<b>P</b> <a href="#">DOE MEASUR Calculators</a>	External weblink to DOE's suite of MEASUR...	Calculation Tool	Jan 5, 2023
<b>P</b> <a href="#">HVAC Tool</a>	Excel workbook for calculating savings for multipl...	Calculation Tool	Jan 1, 2023
<b>P</b> <a href="#">Project Feasibility Study Template, version 1.0</a>	This document is a template for implementers to use and fill out in describing a feasibility study to...	Template	Jan 1, 2023
<b>P</b> <a href="#">Post Installation Summary Report, v1.0</a>	This document is a template for implementers/project developers to use and fill out as the post-...	Template	Jan 1, 2023

Selecting a custom tool allows the user to view or delete it

Scorecard Tool

[Chiller Workbook](#) **VIEW** **DELETE**

**P** [DOE MEASUR Calculators](#) External weblink to DOE's suite of MEASUR calculators

# Creating a Custom Measure

A Custom Measure is created from the Admin panel in the the same way as a Deemed Measure

All measures will need to indicate their Measure Type, which is a choice of "Deemed" or "Custom"

All custom measures must have a Measure ID beginning with "CM"

## CREATE A NEW Measure

Basic

MEASURE TYPE\*

Custom

NAME\*

Chiller System Upgrade

MEASURE ID\*

CMAF001

USE CATEGORY\*

AP - Appliance or Plug Load

EFFECTIVE START DATE\*

2022-12-17

END DATE

Save

Cancel