

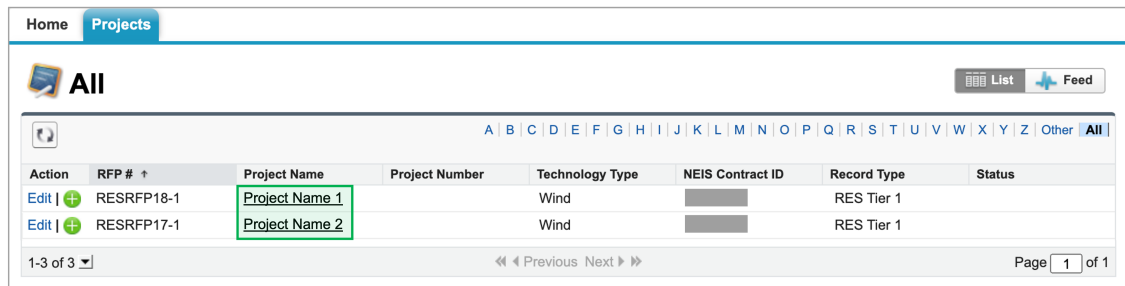
Introduction

All projects from contract execution through commercial operation must submit quarterly reports through the LSR portal. Reports are due March 1, June 1, September 1, and December 1. The quarterly report consists of an updated project schedule and project narrative, plus attachments where applicable.

Updating the Project Schedule

1

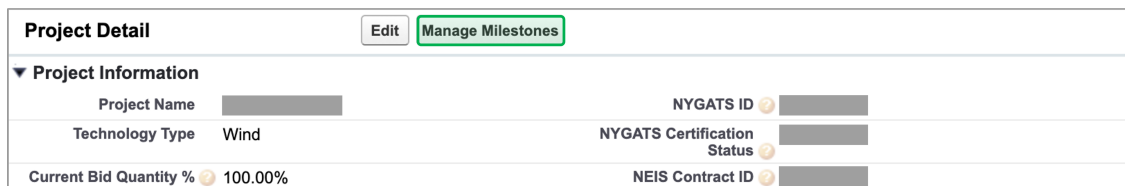
Log into the Salesforce Portal and access the **Projects Tab**. Access the **Project Record** in Salesforce by clicking the link in the **Project Name** column.



Action	RFP # ↑	Project Name	Project Number	Technology Type	NEIS Contract ID	Record Type	Status
Edit +	RESRFP18-1	Project Name 1		Wind		RES Tier 1	
Edit +	RESRFP17-1	Project Name 2		Wind		RES Tier 1	

2

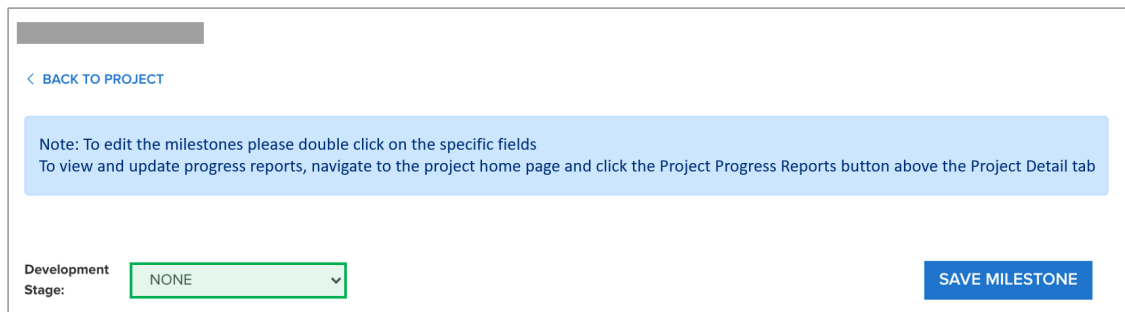
From within the Project Record, click the **Manage Milestones** button above the **Project Details** section.



Project Detail		Edit	Manage Milestones
▼ Project Information			
Project Name		NYGATS ID	
Technology Type	Wind	NYGATS Certification Status	
Current Bid Quantity %	100.00%	NEIS Contract ID	

3

Review each numbered **Milestone** (1-41). You can filter the milestones using the **Development Stage** drop-down or view all milestones by leaving this drop-down on **None**.



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Note: To edit the milestones please double click on the specific fields
To view and update progress reports, navigate to the project home page and click the Project Progress Reports button above the Project Detail tab

Development Stage: NONE

SAVE MILESTONE

4

While reviewing each of the 41 **Milestones**, double-click any cell to edit the cell's contents, or click the **Pencil** icon in the **Edit** Column to edit the entire milestone record.



Update the following fields for each milestone as needed:

Field Name	Requirements
Start/End Dates	Input actual or expected dates. Start and End dates can be the same for discrete events.
Percentage Complete	Update the progress towards the milestone completion.
Status	Provide a brief status description (1-3 sentences).

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Note: To edit the milestones please double click on the specific fields
To view and update progress reports, navigate to the project home page and click the Project Progress Reports button above the Project Detail tab

Development Stage: NONE SAVE MILESTONE

Milestones								
MILESTONE#	MILESTONE NAME	START DATE	END DATE	PERCENTAGE COMPLETE	STATUS	NYSDA COMMENTS	DEVELOPMENT STAGE	EDIT
1	Full site control obtained for the Bid Facility (including AC collection system)	9/30/2018	9/30/2018	100%	All leases and options to purchase for all parcels with proposed turbines,		Site Diligence & Project Development	
2	Full site control obtained for the Gen-Tie Line and Interconnection Facilities		6/20/2018	100%	Collection substation & POI located on same parcel. Parcel under option agreement.		Site Diligence & Project Development	

5

When all required changes have been made to all milestones, click the **Save Milestone** button to save your changes.

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Note: To edit the milestones please double click on the specific fields
To view and update progress reports, navigate to the project home page and click the Project Progress Reports button above the Project Detail tab

Development Stage: NONE SAVE MILESTONE

6

Once saved, click the **Back to Project** link to return to the **Project Record**.

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Note: To edit the milestones please double click on the specific fields
 To view and update progress reports, navigate to the project home page and click the Project Progress Reports button above the Project Detail tab

Development Stage: NONE

SAVE MILESTONE

Creating the Project Narrative

1

Locate and access the **Project Record** in Salesforce. If you are continuing the steps from the section above, you will already be on the **Project Record**.

2

At the top of the **Project Record**, above the **Project Detail** section, click the **Project Progress Reports** option. This will auto-scroll you down to the **Project Progress Reports** section.

Project Milestones [5+]
Project Progress Reports [5+]

Project Detail

Edit Manage Milestones

▼ **Project Information**

Project Name		NYGATS ID	
Technology Type	Wind	NYGATS Certification Status	
Current Bid Quantity %	100.00%	NEIS Contract ID	

3

From the **Project Progress Reports** section, click **Edit** for the latest progress report row. This opens the **Progress Report** edit page.

Project Progress Reports

Action	Progress Report Name	Progress Report Description	Status	Due Date	Completed By	Completed Date	Requires More Information
Edit	Progress Report - 3/1/2019		Draft	12/1/2021			<input type="checkbox"/>

[Show 5 more »](#) | [Go to list \(12\) »](#)

4

In the **Progress Report** edit page, update the following fields

Field Name	Requirements
Completed Date	Input the date you completed the progress report.
Completed By	Input the individuals name who completed the progress report.

Status	<p>Update the status to:</p> <ul style="list-style-type: none"> • Draft: Report is in draft form • Completed: Report is completed, or • Revised: Report has been revised since being completed. <p>A status of Completed indicates to NYSERDA staff that the report is ready to be reviewed.</p>
Progress Report Description	Use this section for the narrative about the project.

Project Progress Report Edit

Save Cancel

Progress Report Detail

= Required Information

Progress Report Name

Progress Report - 3/1/20

Completed Date

[11/16/2021]

Completed By

Requires More Information
☐

Project Name

Bluestone Wind

Status

Draft ▼

Due Date

Progress Report Narrative

Progress Report Description

← →
B *I* U ~~S~~

Save Cancel

5

After updating all required fields and inputting the project narrative, click **Save** either at the top or the bottom of the page to save your progress report updates.

Adding Attachments (If Applicable)

1

Upload required attachments to the corresponding document slots as available. Required attachment could include:

- Copies of any permits or approvals granted
- Copies of any correspondence (of any type) denying or refusing any permit or approval
- Prevailing Wage documentation
- Supplemental M/WBE survey (to be updated as project progresses to construction)

