

## **Electric Vehicle Incentives Database User Guide**

Drive Electric Minnesota maintains an <u>Electric Vehicle Incentives Database</u> on Airtable, which categorizes electric vehicle (EV) incentives across a variety of criteria. The database can be accessed via Drive Electric Minnesota's <u>Incentives</u> web page under The Latest tab. This user guide covers the basics of Airtable and how to find incentives. If you are having additional trouble with Airtable or wish to learn more, the <u>Airtable support web page</u> is a useful tool.





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# **Electric Vehicle Incentives Database walkthrough**

<u>Airtable</u> is a robust data management platform. The Electric Vehicle Incentives Database is housed within an Airtable Base. By default, the base is shown in *Grid View*, which resembles a Microsoft Excel spreadsheet.

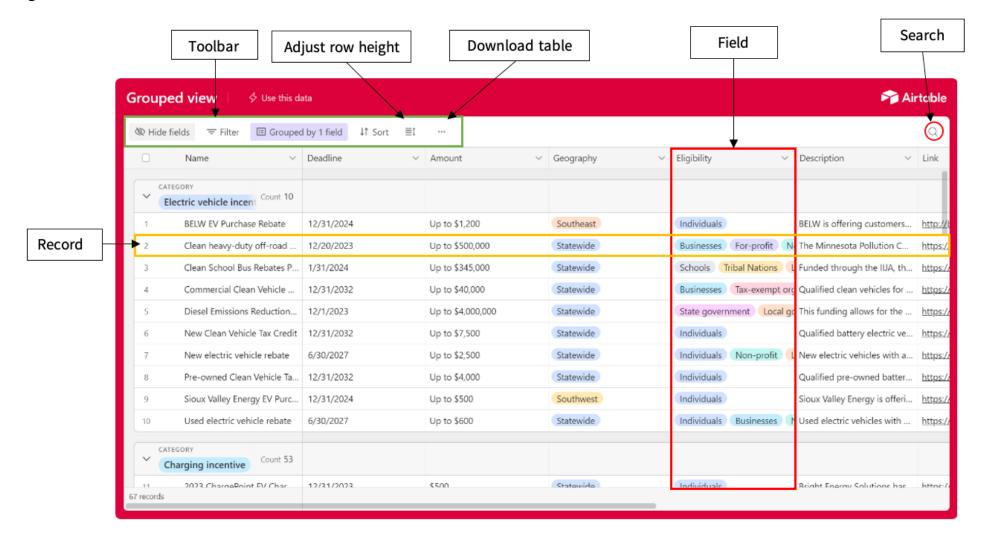
### Airtable terminology

- Field: A column that categorizes the information shown below in the different records. Currently, there are ten fields:
  - **Name**: Descriptive name of the incentive. In some cases, we have expanded on the official name of the incentive to distinguish it from other similar incentives in the database.
  - **Deadline**: When the application is due. Some deadlines include a time, so be sure to confirm the deadline on the linked website.
  - Amount: The total \$ amount given by any incentive.
  - **Geography**: Regions are based on the Clean Energy Resources Team's <u>focus areas</u> (<u>Metro, Northwest, Northeast, West Central, Central, Southwest, and Southeast)</u>.
  - **Eligibility**: Indicates who is eligible to apply for the incentive.
  - **Description**: An overview of the incentive offered. Click on the provided link for more information.
  - Link: Directs the user to more information on the incentive as well as the application or rebate form.
  - **Category**: Refers to the kind of incentive offered (electric vehicle incentive, charging incentive, or other)
  - **Type**: Refers to the entity offering the incentive (federal, state, utility, non-profit, or public-private partnership)
  - Last Updated: Refers to the date and time a record was last updated.
- **Record**: An item or row that includes information across the various field categories.

At the top of the table, there is a toolbar with functions to search, hide, filter, group, and sort fields, as well as adjust row height and download the table. Figure 1 shows the different parts of the database.



Figure 1. Full view of the Electric Vehicle Incentives Database.





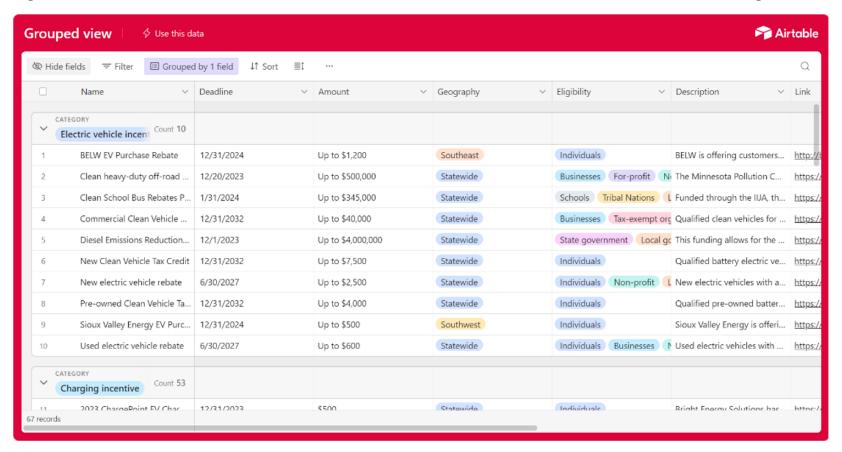
### Viewing records

The Electric Vehicle Incentives Database is currently in *Grouped View*, which looks like a Microsoft Excel spreadsheet with different groupings based on the field *Category*. You can view incentives in the current view or by expanding a record.

#### VIEWING THE DATABASE IN FULL-SCREEN MODE

To expand the view of the database to full-screen mode from the Drive Electric Minnesota <u>Incentives</u> web page, click on <u>View larger version</u> in the lower right corner of the database, as shown in figure 2. A new tab will open, expanding the database to full screen, as shown in figure 1.

Figure 2. The Electric Vehicle Incentives Database on the Drive Electric Minnesota Incentives web page.





#### **EXPANDING A RECORD**

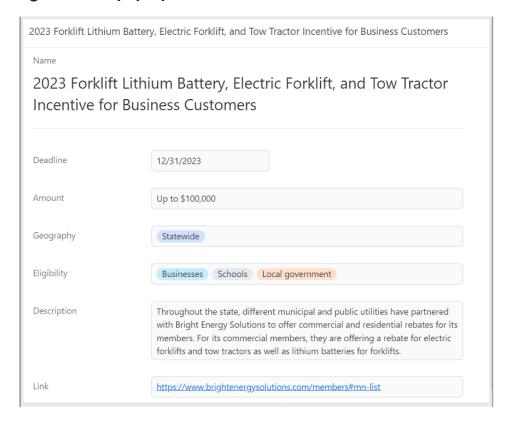
To expand a single record (row), hover your mouse over the record and click on the blue arrow that appears to the left of the incentive's name, as shown in figure 3.

Figure 3. The blue arrow icon.



A pop-up box, shown in figure 4, will appear and show information entered for each field for the selected incentive.

Figure 4. The pop-up box of a record.



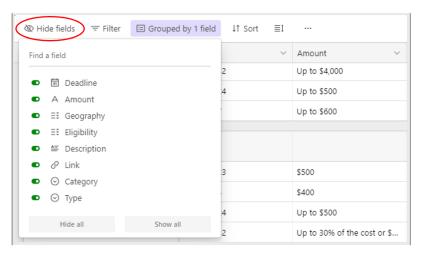


## Hiding fields

This tool allows the user to hide all fields (columns) except for *Name*—multiple fields can be hidden at once. The tool is located in the upper left corner of the table next to *Filter*. You can hide fields using the following two ways:

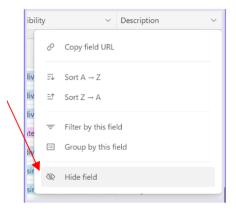
1. Method 1: Click on Hide fields and select a field to hide, as shown in figure 5.

Figure 5. The Hide fields drop-down menu.



2. Method 2: Select a field and click on *Hide field* from the drop-down menu, as shown in figure 6.

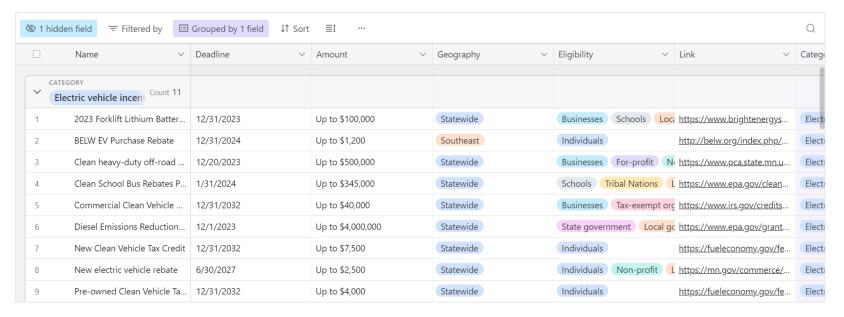
Figure 6. The drop-down menu with *Hide field* selected.





For example, if you hide the field *Description*, the table omits the field, as displayed in figure 7, and it is no longer displayed between *Eligibility* and *Link*. The toolbar also shows the number of hidden fields at any given time.

Figure 7. The Electric Vehicle Incentives Database without the Description field.



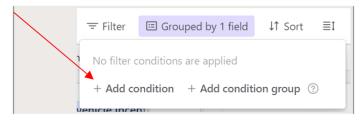


### Filtering records

Filtering records allows you to sift through different incentives to find one that applies to you. You can apply a filter to multiple fields at once to specify your results. The tool can be used for all fields, but we recommend limiting filtering to the fields, *Geography*, *Eligibility*, *Category*, and *Type*. If you filter outside of these fields, it will function similarly to using the search tool. There are two ways to filter records in Airtable:

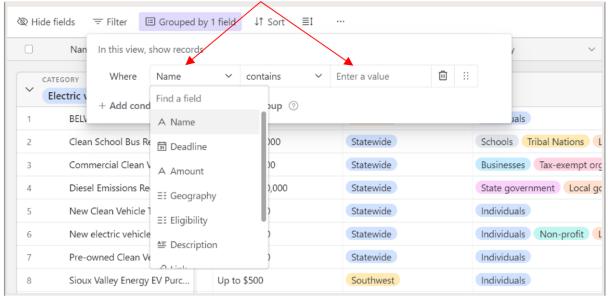
1. **Method 1**: Select *Filter* at the top of the table, then click on *Add condition*, as shown in figure 8.

Figure 8. The Filter menu.



Then select the field you want to filter under *Find a field*. Select the values you wish to see under the selected field, as shown in figure 9.

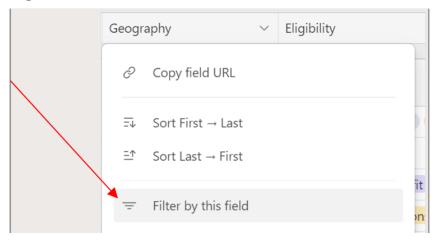
Figure 9. The Filter menu adding a condition.





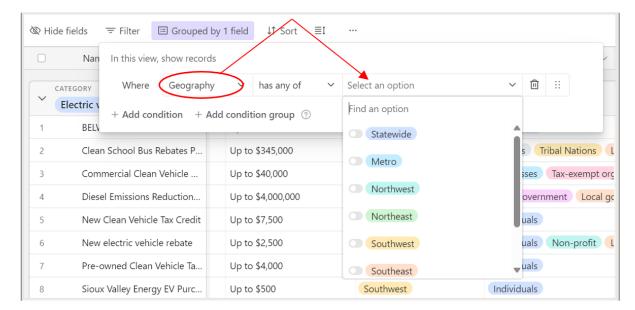
2. Method 2: You can also click on a field header and select Filter by this field, as shown in figure 10.

Figure 10. The drop-down menu with Filter by this field selected.



Next, a condition will appear with the selected field, *Geography*, to select the options to view under the filter, as shown in figure 11.

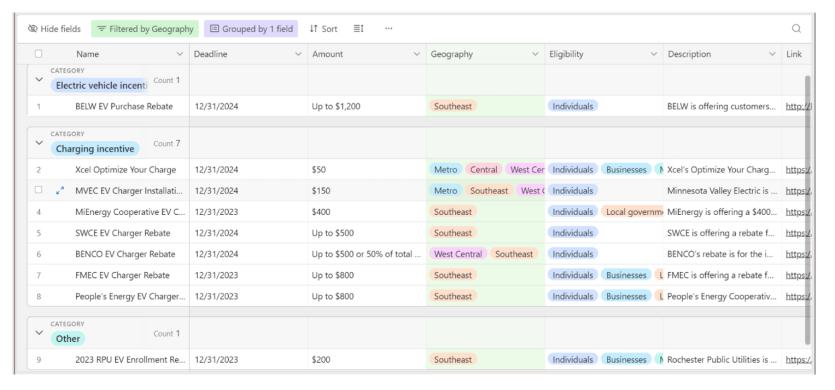
Figure 11. The drop-down menu of options under Geography.





Both methods have the same result, and the filtered field will be highlighted in green when the filter is applied to the Airtable. The example shown in figure 12 displays a filter placed on Geography with the Southeast region selected. You can add more options by editing the existing filter, and you can add more filters on other fields by following the instructions above.

Figure 12. The Electric Vehicle Incentives Database with a filter applied on Geography.



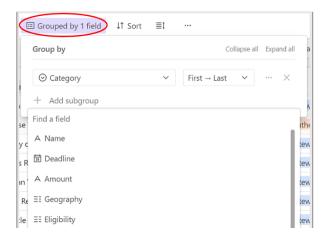


### Grouping records

The grouping tool pairs records based on one or more selected fields. Currently, the Electric Vehicle Incentives Database is grouped by *Category*. We will keep the pre-existing grouping and add a subgroup for the following instructions. The instructions do not differ between adding a group or adding a subgroup. There are two ways to group fields:

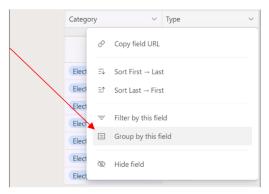
**1. Method 1**: Click on *Group* at the top of the table. Then, select a field to group. The tool will automatically group items from first to last, as shown in figure 13, but you can change the grouping by clicking on the drop-down menu and selecting last to first.

Figure 13. The Group drop-down menu.



2. Method 2: Directly click on the field and select Group by this field. Then, the items will be grouped automatically from first to last, as shown in figure 14, but you can change it to last to first.

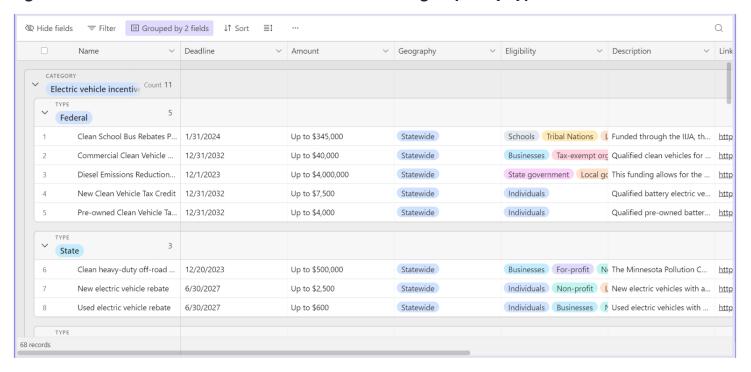
Figure 14. The drop-down menu with *Group by this field* selected.





Once the grouping is added, the toolbar will show how many fields are grouped. The grouping and subgrouping will display as drop-down menus within each other, as shown in figure 15, with *Type* as the subgroup of *Category*.

Figure 15. The Electric Vehicle Incentives Database subgrouped by Type.



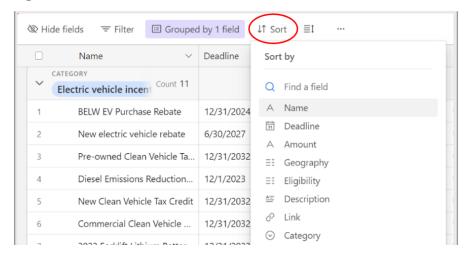


### Sorting records

The sorting tool arranges fields alphabetically, numerically, or from first to last, depending on the field. Like the other tools, multiple fields can be sorted, but the most practical field to use this tool on is *Name*, *Amount*, and *Deadline*. There are two ways to sort fields:

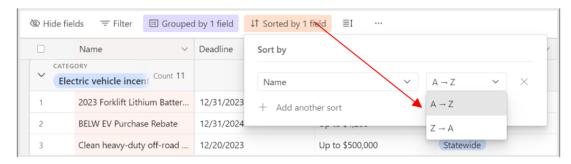
**1. Method 1**: Select *Sort* from the toolbar and then select the field you wish to sort or search for a field by typing in *Find a field*. *Name* is used in this example, as shown in figure 16.

Figure 16. The Sort drop-down menu.



Then select if you want the field to be sorted from *A to Z* or *Z to A* by clicking on the drop-down menu and selecting an option, as shown in figure 17.

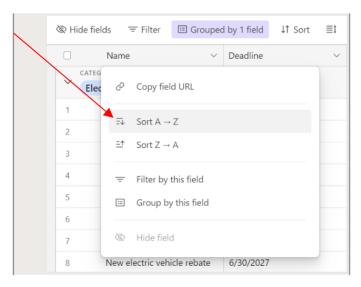
Figure 17. The sorting options' drop-down menu.





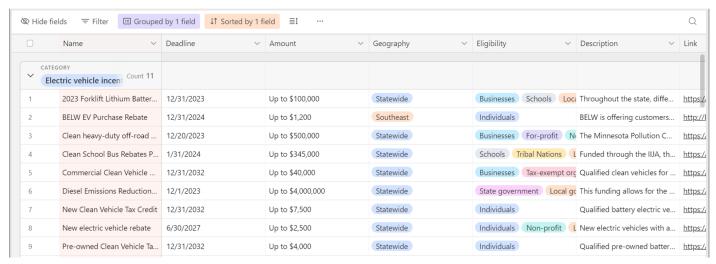
2. Method 2: Click on the arrow by Name for the drop-down menu and select either Sort A to Z or Sort Z to A, as shown in figure 18.

Figure 18. The drop-down menu to select sorting options under a field.



Both methods lead to the same result shown in figure 19. The sorted field is highlighted in orange, and the toolbar displays the number of sorted fields.

Figure 19. The Electric Vehicle Incentives Database sorted by Name.





### Sample use cases

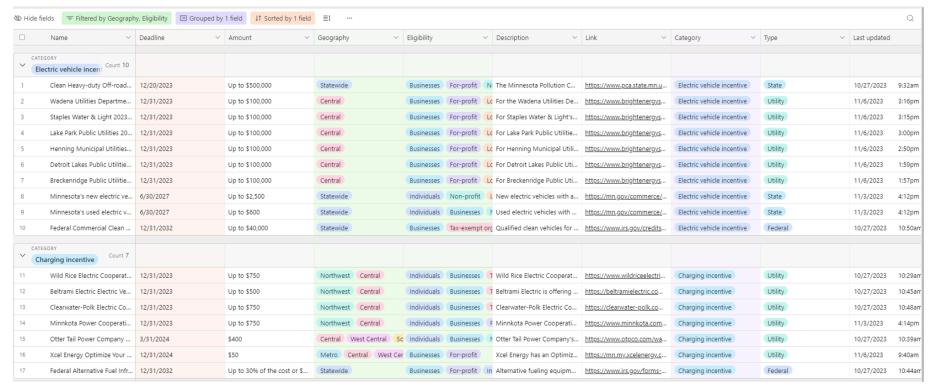
The following two use cases provide examples on how one might use the Electric Vehicle Incentives Database. Step-by-step guidance follows a general description of each use case.

#### **ELECTRIFYING A FLEET IN OTTER TAIL COUNTY**

A business in Otter Tail County, MN, is looking for incentives to reduce the cost of electric fleet vehicles and chargers.

- Step 1: Filter the fields *Eligibility* and *Geography*.
- Step 2: Select Businesses under Eligibility and Central and Statewide under Geography.
- Step 3: Sort the fields, Deadline, to organize the due dates by most recent.

Figure 20. The resulting view of the Electric Vehicle Incentives Database filtered for a business in Otter Tail County.



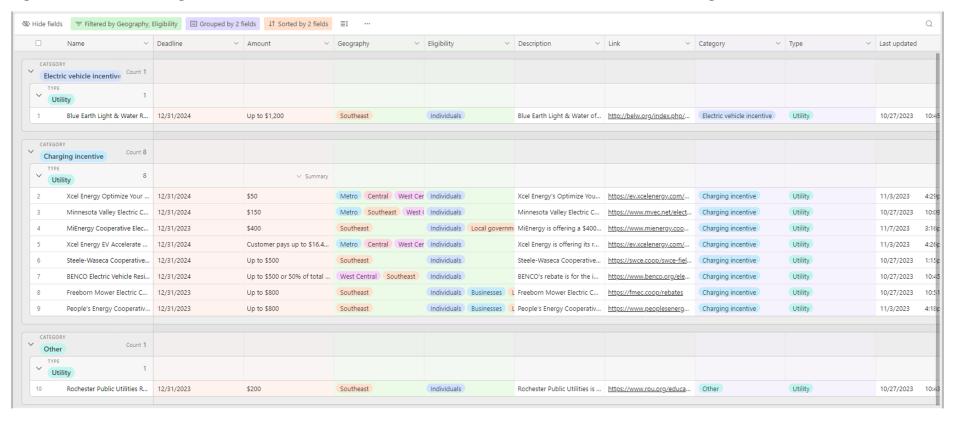


#### A RESIDENTIAL CUSTOMER IN ROCHESTER SWITCHING TO ELECTRIC

A resident living in a single-family home in Rochester, MN, is looking for any incentive that might reduce costs as they transition to driving electric.

- Step 1: Filter the fields *Eligibility* and *Geography* and select options for incentives that are for *Individuals* who live in the *Southeast* region of Minnesota.
- Step 2: Add a subgrouping under the field Type.
- Step 3: Sort the fields Deadline and Amount to see which incentives are due soon and organize the incentives in increasing order.

Figure 21. The resulting view of the Electric Vehicle Database filtered for an individual residing in Rochester.



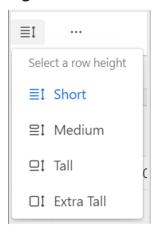


#### Other features of the toolbar

#### **ADJUSTING ROW HEIGHT**

Airtable provides an option to adjust row height in a table, which expands or decreases the view. The row height options are *Short, Medium, Tall, and Extra Tall*. To adjust the row height, click on the icon with three horizontal lines and a bidirectional arrow, then click on the desired height, as shown in figure 22.

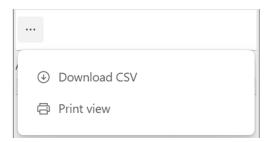
Figure 22. The row height options' drop-down.



#### DOWNLOADING OR PRINTING THE DATABASE

Airtable is not screen reader-friendly, so downloading the table or printing the table can help make the content more accessible. To download or print the database, click on the three dots icon, which is the last item on the right and select the desired option from the drop-down menu, as shown in figure 23.

Figure 23. The drop-down menu to download or print the database.





#### SEARCHING RECORDS

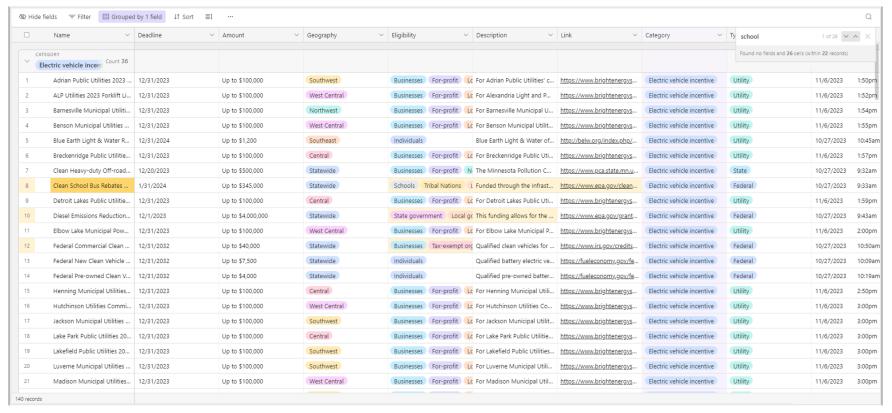
The search function allows the user to search across the database by typing in a word or phrase. To search the records, click on the magnifying glass icon in the far right corner of the toolbar and type what you wish to search for in *Find in view*, as shown in figure 24.

Figure 24. The search bar.



The search will identify where a certain word or phrase appears across the database. Figure 25 shows an example of the database with the word *school* entered into the search bar.

Figure 25. The Electric Vehicle Incentives Database with the search function in use.





## Looking ahead

So, that's it! Now you have all the tools you need to find available electric vehicle and charging incentives near you. As you continue your journey to driving electric, we invite you to use our charging, fleet planning, community, and electric vehicle resources. Happy shopping!

### **Feedback**

Please let us know if there is something we can improve by emailing us at <a href="mailto:driveelectricmn@gpisd.net">driveelectricmn@gpisd.net</a>.