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INTRODUCTION

The Energy Division of the California Public Utilities Commission developed the Public Document Area (PDA) to allow members of the public, ED staff, contractors, utility members and other interested parties can download and comment on documents made open to the public by the CPUC. The PDA site serves as a repository for important CPUC information, comments, questions and answers, and is built to handle uploading and viewing of documents as well as hosting discussions on energy efficiency topics. The public’s input in this process is appreciated.

The site is hosted at http://www.energydataweb.com/cpuc. For authorized users of the CPUC Contract Management System (CMS), you may access this site via the Go to the Public Documents Area link located on the bottom of the CMS home page.

Helpful Hints

Support

If this User Guide does not help you sufficiently, be sure to contact support by selecting Support at the top right of the page. Support will then get back to you in a timely manner to resolve your issue.
Users
The PDA site supports four different user types, each having unique navigation paths and viewing/editing privileges.

Public
This user type may view documents uploaded to the home page, and those made open to the public by CPUC.

CPUC Staff – Administrator and Contract Managers
CPUC staff may view documents, make comments and questions, run various reports, generate email lists and manage their documents.

Utility Users
Utility users may view documents, make comments and questions, generate email lists and manage their documents.
PUBLIC USER

Participation in this public review process is valuable and appreciated by the CPUC. This site provides the opportunity for members of the public to view key dates and documents uploaded to the home page by CPUC staff, and to view related documents, such as impact reports, evaluation plans and other supplemental information. The site also offers the opportunity to subscribe to documents of interest and serves as a repository for final, approved documents that are no longer open for public review.

Public User’s Site Description

There are 2 initial tabs at the top of the public user’s home page: SEARCH and EM&V DOCS.

When the public user has created an account, and is logged in, MY DOCUMENTS, MY SUBSCRIPTIONS, and USER INFO become available.
**Search Tab**

The **SEARCH** tab allows you to select criteria by which to search all public documents. By default, all documents are shown. If you would like to narrow your search, select the **Advanced Search** link just below the search button.

From this menu, you’ll be able to clarify criteria for your search.

Additionally, you can download your search results by selecting **Download**.
**Log In Tab**

The **LOG IN** tab allows you to sign in to your account to be able to comment on documents.

To login, enter your email address and your password, then select **Submit**.

*If you have forgotten your password, select the link to reset your password, enter your email address, and check your email.*

**Register**

Select **Register**, at the top right, to begin creating your account. Make sure that your email is correct, and you’ve chosen a secure password, then check your email for further instructions. Registering with the site allows to be able to comment and subscribe to documents.
**EM&V Documents**
This tab specifically shows you documents referring to the Evaluation, Measurement and Verification (EM&V) methods, and processes.

**My Documents Tab (logged-in)**
This tab allows you to view documents to which you have subscribed, and to comment on applicable documents. It also allows you to subscribe to various document attributes and receive an email notification when a document is released that matches your subscription preferences.

**User Info Tab (logged-in)**
This tab allows you to update your user information. The email address you chose to associate your account with automatically be filled-in.
System Capabilities

Search Documents
Click on the SEARCH tab to search for documents. Select the criteria to search for your document using Advanced Search. To view a document, select the DOWNLOAD button.

When logged-in, you may select the MY DOCUMENTS button to mark that document as yours. You will notice the button become yellow; this indicates the document is yours. This will allow you to view/comment on those documents in your MY DOCUMENTS page.

To view your selected documents, simply click the MY DOCUMENTS tab and select the correct cycle from the CYCLE drop-down list. Additionally, you can FILTER documents by typing the title, or summary.

Viewing Comments
Click on the SEARCH tab to search for the public document. Select the criteria to search for your document. To see if there are comments available for viewing, click COMMENTS.
When logged-in, you may also access the comments for your subscribed documents from the **My Documents** page.

## Adding Comments or Questions

To add comments/questions:

1. Click **Add a Comment or Question** to add your comment or question.

2. This will bring you to the **Create Comment or Question** page. Each comment must include a subject title which may include the name of a particular utility program or an area of concern. Enter this in the “Subject” field.

3. Mark whether you are adding a comment or a question by selecting the appropriate choice from the dropdown.
   
   If you are asking a question, designating it as such allows for a response.

4. If applicable, please enter in the section and/or page associated with the note.

5. Summarize your ideas in the “Comment” area. While commenting, please keep comments to no more than 200 words. Do not bundle multiple comments together; make each individual comment separately.

6. If you wish, you may upload a supporting document. PDF files are preferred. Please do not upload documents with “track changes” or other editing tools.

7. When you have finished, click **Submit**. If you have added a comment, a dialog box stating, “Your comment has been added.” will appear. If you have added a question, the dialog box will say, “Your question has been added.” Click **OK** to close.

## Subscribing to Document Attributes

When logged-in, you may click on the **Subscribe** button on a document to subscribe to any or the entire list of the document’s attributes. It will also allow you to unsubscribe to any or the entire list of the document’s attributes if so desired.

By subscribing, you will receive an email notification when a new document is released that matches any of the attributes that you selected. Select the attributes that you want to subscribe or unsubscribe by clicking the checkboxes. Click the **Subscribe** button to accept your selections.
Using My Subscriptions

When logged-in, simply click the **MY SUBSCRIPTIONS** tab. The **MY SUBSCRIPTIONS** page will show your current category and work order subscriptions and will allow you to change your subscription preferences.

Your preferences are highlighted in yellow. Simply click the option again to unsubscribe from categories and work orders.

By subscribing, you will receive an email notification when a new document is released that matches any of the attributes that you selected.

*Note: The new document must be set to “published” in order to receive the notification email*
CPUC STAFF

The PDA site provides CPUC staff the opportunity to create documents for public review and discussion. Documents can revolve around a specific CPUC contract or just general topics of interest.

Logging In
CPUC staff can access the PDA simply by typing in your credentials under the LOGIN tab.

CPUC Staff’s Site Description
Eight tabs are located at the top of the page: SEARCH, MY DOCUMENTS, MY SUBSCRIPTIONS, EM&V DOCS, USER INFO, UPLOAD/EIDT DOCUMENTS, REPORTS, and ADMIN.

Search Tab
The SEARCH tab allows you to select criteria by which to search all public documents.

My Documents Tab
This tab allows you to view documents to which you have subscribed, and to comment on applicable documents. It also allows you to subscribe to various document attributes and receive an email notification when a document is released that matches your subscription preferences.

My Subscriptions Tab
This tab will show your current category and work order subscriptions and will allow you to change your subscription preferences.

EM&V Documents Tab
This tab specifically shows you documents referring to the Evaluation, Measurement and Verification (EM&V) methods, and processes.

Upload/Edit Documents Tab
This tab allows you to upload documents the home page, categorize documents, and enter key dates for display on the home page. The file types .xls, .pdf, and .docx are accepted files for documents. PDF files are preferred.
User Info Tab
This tab allows you to update your user information.

Reports Tab
Three reports may be generated from this tab: Deliverable Downloads, Public Comment Summary, and Comment and Resolution.

Admin Tab
This tab allows you to maintain the category drop-downs, update EM&V Documents, and generate email lists.

System Capabilities

Search Documents
Click on the **Search** tab to search for documents. Select the criteria to search for your document using **Advanced Search**. To view a document, select the **Download** button.

When logged-in, you may select the **My Documents** button to mark that document as yours. You will notice the button become yellow; this indicates the document is yours. This will allow you to view/comment on those documents in your **My Documents** page.

To view your selected documents, simply click the **My Documents** tab and select the correct cycle from the **Cycle** drop-down list. Additionally, you can **Filter** documents by typing the title, or summary.
**Viewing Comments**
Click on the **SEARCH** tab to search for the public document. Select the criteria to search for your document. To see if there are comments available for viewing, click **COMMENTS**.

When logged-in, you may also access the comments for your subscribed documents from the **MY DOCUMENTS** page.

**Adding Comments or Questions**
To add comments/questions:

1. Click **ADD A COMMENT OR QUESTION** to add your comment or question.

![Add a Comment or Question](image)

2. This will bring you to the **CREATE COMMENT OR QUESTION** page. Each comment must include a subject title which may include the name of a particular utility program or an area of concern. Enter this in the “Subject” field.

3. Mark whether you are adding a comment or a question by selecting the appropriate choice from the dropdown.
   If you are asking a question, designating it as such allows for a response.

4. If applicable, please enter in the section and/or page associated with the note.

5. Summarize your ideas in the “Comment” area. While commenting, please keep comments to no more than 200 words. Do not bundle multiple comments together; make each individual comment separately.

6. If you wish, you may upload a supporting document. PDF files are preferred. Please do not upload documents with “track changes” or other editing tools.

7. When you have finished, click **SUBMIT**. If you have added a comment, a dialog box stating, “Your comment has been added.” will appear. If you have added a question, the dialog box will say, “Your question has been added.” Click **OK** to close.
Adding a Response to a Comment/Question

1. Select **COMMENTS** on the document you’d like to add a comment to, locate the comment or question to which you are responding and click **RESPOND**.
2. Type your response to the comment or question in the field provided.
3. Click **SUBMIT** when finished.

Subscribing to Document Attributes

When logged-in, you may click on the **SUBSCRIBE** button on a document to subscribe to any or the entire list of the document’s attributes. It will also allow you to unsubscribe to any or the entire list of the document’s attributes if so desired.

By subscribing, you will receive an email notification when a new document is released that matches any of the attributes that you selected. Select the attributes that you want to subscribe or unsubscribe by clicking the checkboxes. Click the **SUBSCRIBE** button to accept your selections.

Using My Subscriptions

When logged-in, simply click the **MY SUBSCRIPTIONS** tab. The **MY SUBSCRIPTIONS** page will show your current category and work order subscriptions and will allow you to change your subscription preferences.
Your preferences are highlighted in yellow. Simply click the option again to unsubscribe from categories and work orders.

By subscribing, you will receive an email notification when a new document is released that matches any of the attributes that you selected.

*Note:* The new document must be set to “published” to receive the notification email

**Document Administration**

CPUC Staff can upload, publish, and categorize public documents using the **Upload/Edit Documents** link. There the CPUC Staff user can change which type of documents they are viewing by changing the filter labeled “Published” to either select **Yes** or **No**, and by choosing the portfolio cycle from the drop-down menu.

The CPUC Staff user may add a new document by clicking on **Add Document** or edit an existing document by clicking on **Edit**.

**Adding a New Document**

To add a new document:

1. Under the **Upload/Edit Documents** tab, click the **Add Document** button.
2. This will take you to the **Add New Document** page.
3. Enter the document title and a summary.
4. Select **Choose File** to browse for and locate a document, or additional attachment you’d like to upload. *The file types .xls, .pdf, and .docx are accepted files for documents. PDF files are preferred.*
5. Specify your documents attributes.
6. When you are finished, click **SUBMIT**.

**Editing Document Attributes**

To edit document attributes:

1. Navigate to the **UPLOAD/EDIT DOCUMENTS** tab.
2. Depending on where your document is located that you want edited, you may need to use the filter labeled “Published” to either select **YES** or **NO**, and by choosing the portfolio cycle from the drop-down menu to locate the correct document.
3. Next to each document is an **EDIT** link. Choose the document that needs to be updated and click **EDIT**. This will take you to the **EDIT DOCUMENT** page.
4. Add or update information as needed. You may also upload a new document by trashing the old one and then selecting **CHOOSE FILE**, browsing, and locating your new document.
5. When you are finished, click **SUBMIT**.

**Reports**

CPUC staff may access three reports, the Comment and Resolution Report, the Deliverable Download Report, and the Public Comment Summary Report, by clicking on the **REPORTS** tab. The Deliverable Download and Public Comment Summary reports open in an easy-to-read, on-screen format. For the Comment and Resolution report you will need to select a *Published After* date. All reports can be exported into a .csv file to be opened through Excel.

Below are descriptions of each report and instructions on how to create each of them:

1. **Deliverable Download Report** – click the **DELIVERABLE DOWNLOAD REPORT** link to see each contract and its deliverables. Under each deliverable is a user list displaying their email as well as the date and time of downloads.
2. **Public Comment Summary Report** – click the **PUBLIC COMMENT SUMMARY REPORT** link to see each contract, its deliverables and topics.
3. **Comment and Resolution Report** – click the **COMMENT AND RESOLUTION REPORT** link to create an Excel document showing contracts, deliverables, topics and specific details on comments, such as author, agency, section and response. From the drop-down menu select all contracts or a specific contract, all agencies or a specific agency and the date after which public viewing started. Click **SUBMIT**. In **Internet Explorer**, this will run an Excel spreadsheet and bring up a dialog box that will ask if you want to open, save or cancel the “comment-resolution-report.csv” document. If you choose to save the document, you will need to identify the location on your computer where you would like it to be saved. If you open the document, Excel will open and you will be able to...
view the report. In Chrome the report will be placed on the downloads bar at the bottom of the screen where you can click on it to open the document.

**PDA Site Administration**
From the **ADMIN** tab, CPUC staff can update EM&V documents, add or edit document attributes, and generate email lists.

**Category Administration**
From the **CATEGORY ADMINISTRATION** page, the CPUC Staff can select a category from the dropdown list and use the **ADD**, **EDIT**, or **TRASH** features to change that category.

**EM&V Document Administration**
CPUC Staff can add and edit documents that appear on the Energy Efficiency EM&V Plans list under Search criteria on the Search page.

**Adding a New Document**
To add a new document:

1. Click **ADD DOCUMENT** which will take you to the **ADD EM&V DOCUMENT** page for the home page document type that was selected.
2. Enter the document title and a summary.
3. Click **CHOOSE FILE** and locate the document you want to upload, click **OPEN**.
4. To save your document, click **SUBMIT**.
Editing an EM&V Document

To edit a document:

1. Navigate to EM&V DOCUMENT ADMINISTRATION under the ADMIN tab.
2. Next to each document is an EDIT link. Choose the document that needs to be updated and click EDIT. This will take you to the EDIT EM&V DOCUMENT page.
3. Add or update information as needed. You may also upload a new document by trashing the old one and then selecting CHOOSE FILE, browsing, and locating your new document.
4. When you are finished, click SUBMIT.

Removing a Document from the List

To remove a document from the list:

1. At the ADMIN tab, click the EM&V DOCUMENT ADMINISTRATION link.
2. Next to each document is an EDIT link. Choose the appropriate document and click EDIT.
3. Select the icon to delete the document. Please note that the document is deleted immediately after you click the button.

Create Subscriber Email List

CPUC Staff can create a custom email list based on users subscribed to various document attributes. Using this feature, informational updates and notices can be sent to those interested.

To create an email list:

1. At the ADMIN tab, click the CREATE SUBSCRIBER EMAIL LIST link.
2. Selected attributes are highlighted yellow. Go throughout the list and select your desired attributes, then select SUBMIT.
3. A dialog box will open with the option to generate an Excel spreadsheet and add the file to your downloads bar or bring up a dialog box that will ask if you want to open, save or cancel the “subscriber-email-list.csv” document. If you choose to save the document, you will need to identify the location on your computer where you would like it to be saved. If you open the document, Excel will open and you will be able to view the listing.
4. If multiple attributes are selected, a user’s email will be added to the list if at least one of the selected attributes is a match.
UTILITY STAFF

Utility staff may view topics created by ED staff and look at related documents, such as impact reports, evaluation plans, supplemental information and the opportunity to subscribe to topics of interests; draft documents, notes, and comments relating to topics are available to view and comment upon, as applicable; and upload and publish documents and make edits as necessary. This site also serves as a repository for final, approved documents that are no longer open for public review.

Logging In
Utility staff can access the PDA simply by typing in your credentials under the LOGIN tab.

Utility Staff’s Site Description
Six tabs are located at the top of the page: SEARCH, EM&V Docs, My Documents, Upload/Edit Documents, and User Info.

Search Tab
The SEARCH tab allows you to select criteria by which to search all public documents.

My Documents Tab
This tab allows you to view documents to which you have subscribed, and to comment on applicable documents. It also allows you to subscribe to various document attributes and receive an email notification when a document is released that matches your subscription preferences.

My Subscriptions Tab
This tab will show your current category and work order subscriptions and will allow you to change your subscription preferences.

EM&V Documents Tab
This tab specifically shows you documents referring to the Evaluation, Measurement and Verification (EM&V) methods, and processes.

Upload/Edit Documents Tab
This tab allows you to upload documents the home page, categorize documents, and enter key dates for display on the home page. The file types .xls, .pdf, and .docx are accepted files for documents. PDF files are preferred.

User Info Tab
This tab allows you to update your user information.
System Capabilities

Search Documents
Click on the SEARCH tab to search for documents. Select the criteria to search for your document using Advanced Search. To view a document, select the DOWNLOAD button.

When logged-in, you may select the MY DOCUMENTS button to mark that document as yours. You will notice the button become yellow; this indicates the document is yours. This will allow you to view/comment on those documents in your MY DOCUMENTS page.

To view your selected documents, simply click the MY DOCUMENTS tab and select the correct cycle from the CYCLE drop-down list. Additionally, you can FILTER documents by typing the title, or summary.

Viewing Comments
Click on the SEARCH tab to search for the public document. Select the criteria to search for your document. To see if there are comments available for viewing, click COMMENTS.
When logged-in, you may also access the comments for your subscribed documents from the **My Documents** page.

**Adding Comments or Questions**

To add comments/questions:

1. Click **Add a Comment or Question** to add your comment or question.

2. This will bring you to the **Create Comment or Question** page. Each comment must include a subject title which may include the name of a particular utility program or an area of concern. Enter this in the “Subject” field.

3. Mark whether you are adding a comment or a question by selecting the appropriate choice from the dropdown. If you are asking a question, designating it as such allows for a response.

4. If applicable, please enter in the section and/or page associated with the note.

5. Summarize your ideas in the “Comment” area. While commenting, please keep comments to no more than 200 words. Do not bundle multiple comments together; make each individual comment separately.

6. If you wish, you may upload a supporting document. PDF files are preferred. Please do not upload documents with “track changes” or other editing tools.

7. When you have finished, click **Submit**. If you have added a comment, a dialog box stating, “Your comment has been added.” will appear. If you have added a question, the dialog box will say, “Your question has been added.” Click **OK** to close.

**Adding a Response to a Comment/Question**

1. Select **Comments** on the document you’d like to add a comment to, locate the comment or question to which you are responding and click **Respond**.

2. Type your response to the comment or question in the field provided.

3. Click **Submit** when finished.
**Subscribing to Document Attributes**
When logged-in, you may click on the **SUBSCRIBE** button on a document to subscribe to any or the entire list of the document’s attributes. It will also allow you to unsubscribe to any or the entire list of the document’s attributes if so desired.

By subscribing, you will receive an email notification when a new document is released that matches any of the attributes that you selected. Select the attributes that you want to subscribe or unsubscribe by clicking the checkboxes. Click the **SUBSCRIBE** button to accept your selections.

**Using My Subscriptions**
When logged-in, simply click the **MY SUBSCRIPTIONS** tab. The **MY SUBSCRIPTIONS** page will show your current category and work order subscriptions and will allow you to change your subscription preferences.

Your preferences are highlighted in yellow. Simply click the option again to unsubscribe from categories and work orders.

By subscribing, you will receive an email notification when a new document is released that matches any of the attributes that you selected.

*Note: The new document must be set to “published” to receive the notification email*
Document Administration

Utility Staff can upload, publish, and categorize public documents using the **UPLOAD/EDIT DOCUMENTS** link. There the CPUC Staff user can change which type of documents they are viewing by changing the filter labeled “Published” to either select **YES** or **NO**, and by choosing the portfolio cycle from the drop-down menu.

The CPUC Staff user may add a new document by clicking on **ADD DOCUMENT** or edit an existing document by clicking on **EDIT**.

### Adding a New Document

To add a new document:

1. Under the **UPLOAD/EDIT DOCUMENTS** tab, click the **ADD DOCUMENT** button.
2. This will take you to the **ADD NEW DOCUMENT** page.
3. Enter the document title and a summary.
4. Select **CHOOSE FILE** to browse for and locate a document, or additional attachment you’d like to upload. *The file types .xls, .pdf, and .docx are accepted files for documents. PDF files are preferred.*
5. Specify your documents attributes.
6. When you are finished, click **SUBMIT**.

**Editing Document Attributes**

To edit document attributes:

1. Navigate to the **UPLOAD/EDIT DOCUMENTS** tab.
2. Depending on where your document is located that you want edited, you may need to use the filter labeled “Published” to either select **YES** or **NO**, and by choosing the portfolio cycle from the drop-down menu to locate the correct document.
3. Next to each document is an **EDIT** link. Choose the document that needs to be updated and click **EDIT**. This will take you to the **EDIT DOCUMENT** page.
4. Add or update information as needed. You may also upload a new document by trashing the old one and then selecting **CHOOSE FILE**, browsing, and locating your new document.
5. When you are finished, click **SUBMIT**.