

Public Document Area User Guide

Version 5.0 (Revised May 2020)

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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

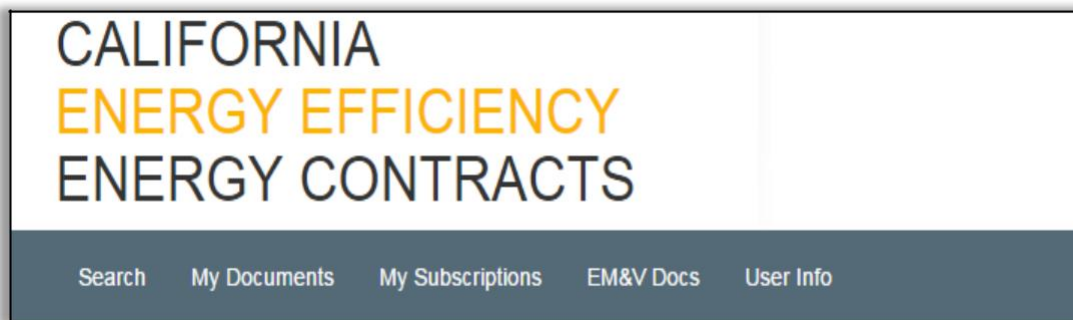
Participation in this public review process is valuable and appreciated by the CPUC. This site provides the opportunity for members of the public to view key dates and documents uploaded to the home page by CPUC staff, and to view related documents, such as impact reports, evaluation plans and other 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.



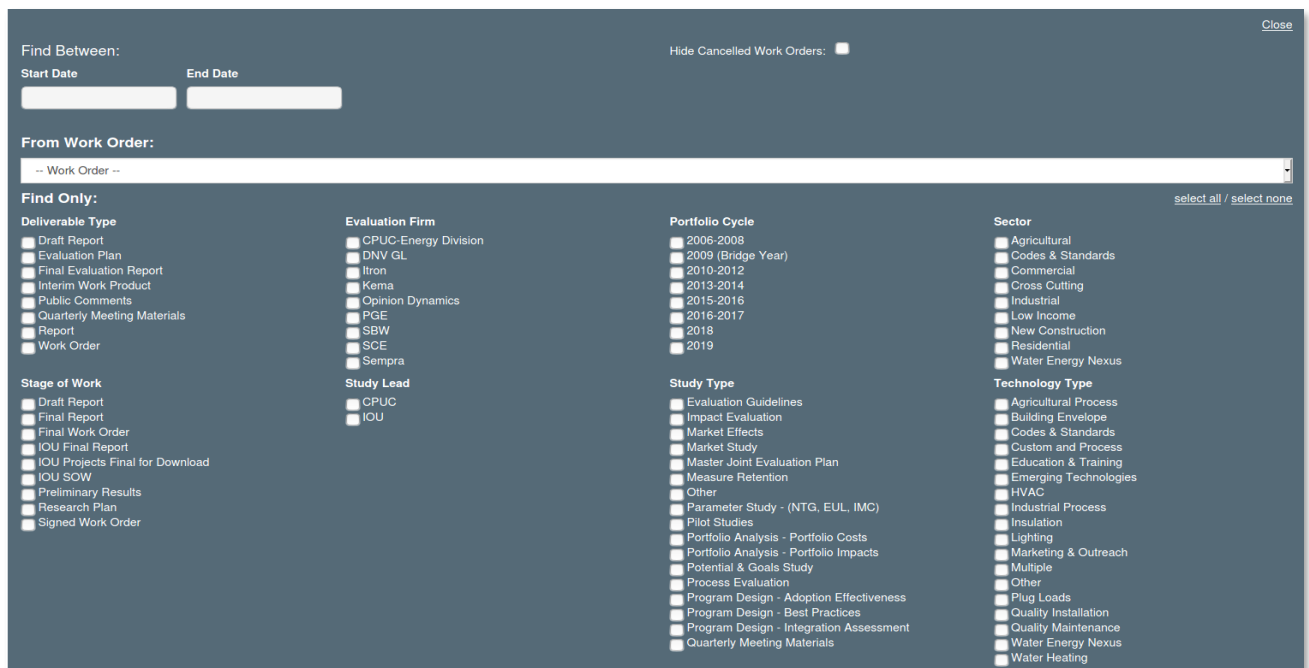
Search Tab

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. By default, documents are searched by Title. You can also filter by Attachment or Document.



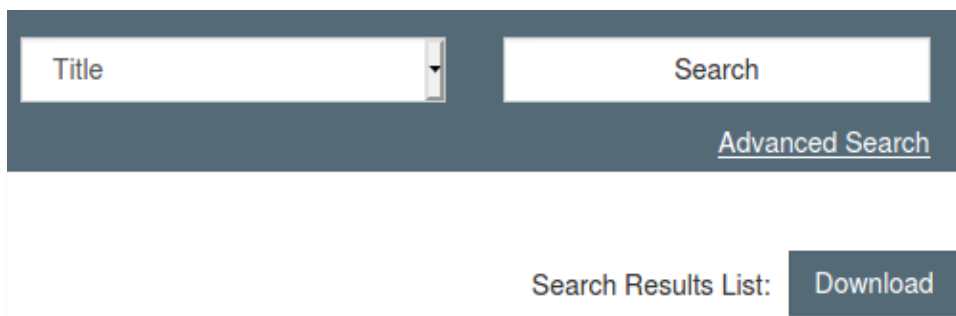
The image shows a search interface with a dark blue background. On the left, there is a dropdown menu with the word "Title" selected. To the right of the dropdown is a white rectangular button with the word "Search" in dark blue text. Below the "Search" button, the text "Advanced Search" is displayed in a lighter blue, underlined font.

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



The image displays a complex search filter menu with a dark blue header and a white body. The header includes "Find Between:" with "Start Date" and "End Date" input fields, and "Hide Cancelled Work Orders:" with a checkbox. Below the header is a "From Work Order:" dropdown menu. The main section is titled "Find Only:" and contains several columns of filter categories, each with a list of items and checkboxes. The categories are: Deliverable Type, Evaluation Firm, Portfolio Cycle, Sector, Stage of Work, Study Lead, and Technology Type. At the bottom right of the filter section, there are links for "select all / select none".

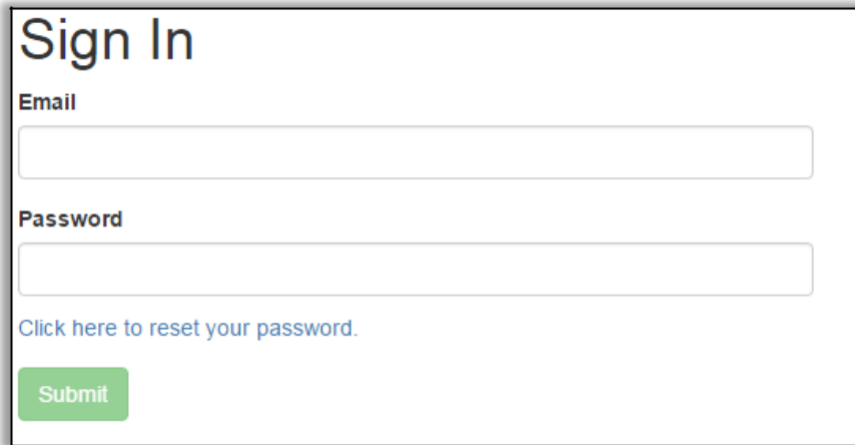
Additionally, you can download your search results by selecting **Download**.



The image shows a search interface similar to the first one, but with an additional button. It features a dropdown menu with "Title" selected, a "Search" button, and a link for "Advanced Search". Below these elements, the text "Search Results List:" is displayed, followed by a dark blue button with the word "Download" in white text.

Log In Tab

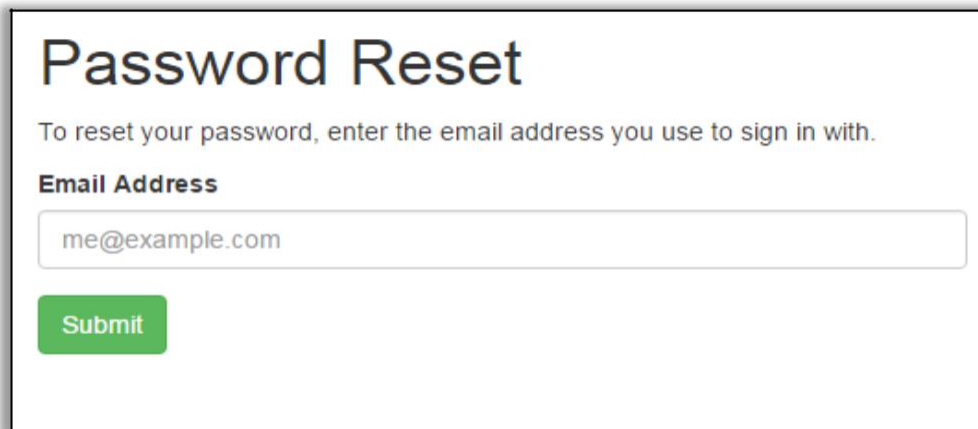
The **LOG IN** tab allows you to sign in to your account to be able to comment on documents.



The image shows a 'Sign In' form with a title 'Sign In' in a large, bold font. Below the title are two input fields: 'Email' and 'Password'. The 'Email' field is empty, and the 'Password' field is also empty. Below the 'Password' field is a blue link that says 'Click here to reset your password.'. At the bottom of the form is a green 'Submit' button.

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.



The image shows a 'Password Reset' form with a title 'Password Reset' in a large, bold font. Below the title is a line of text: 'To reset your password, enter the email address you use to sign in with.'. Below this text is an input field labeled 'Email Address' containing the text 'me@example.com'. At the bottom of the form is a green 'Submit' button.

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.

Name	Summary	Uploaded	
Test EMV	Test EMV Upload	Mar 14, 2017	<input type="button" value="Download"/>
2013-2017 Energy Division & Program Administrator Energy Efficiency EM&V Plan (Version 7)	The evaluation measurement and verification (EM&V) plan for the (IOUs) energy efficiency programs expands on the Energy Division's energy efficiency work and oversight in its objectives and administration. The EM&V plan supports oversight of the program administrators portfolio of energy efficiency programs.	Jan 19, 2017	<input type="button" value="Download"/>

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.

User Info

First Name

Last Name

Company/Agency

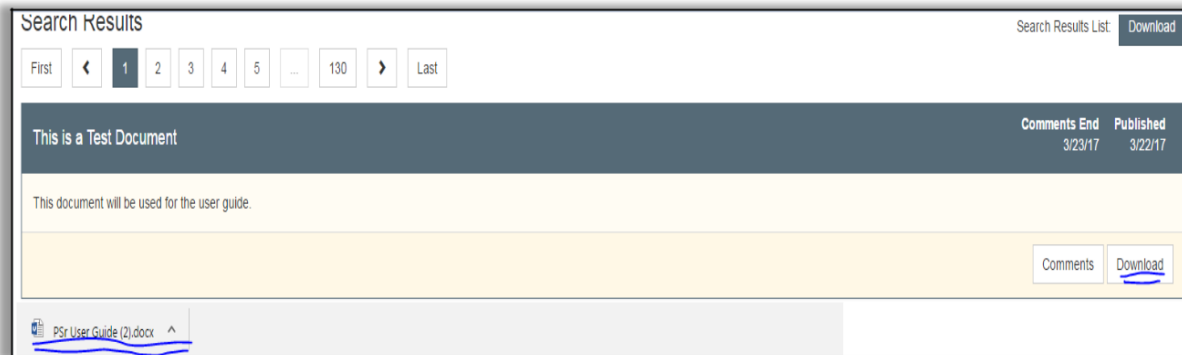
Phone

Email

System Capabilities

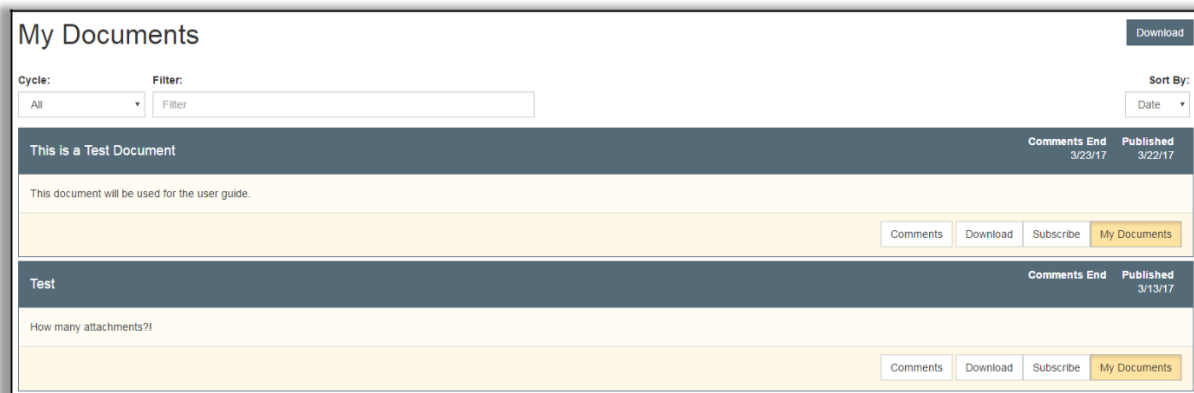
Search Documents

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.



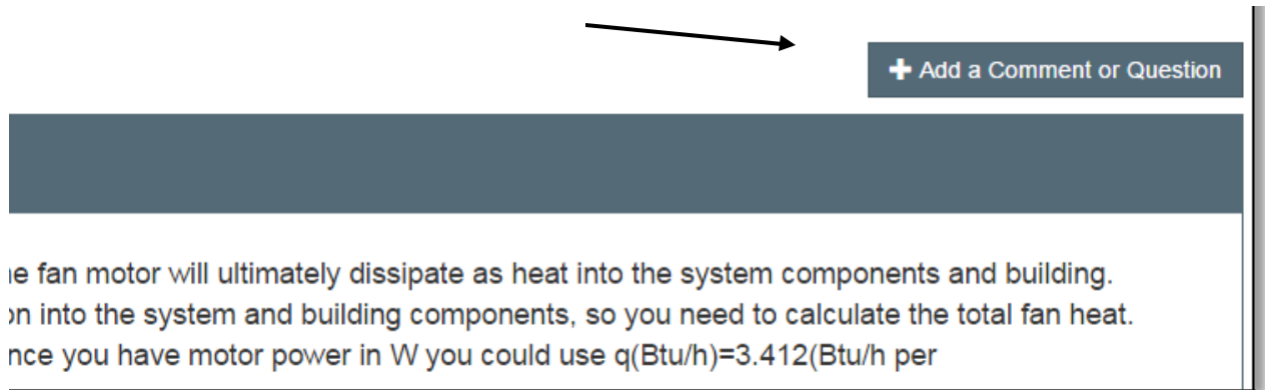
Viewing Comments

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.
 - a. 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.
 - a. 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.

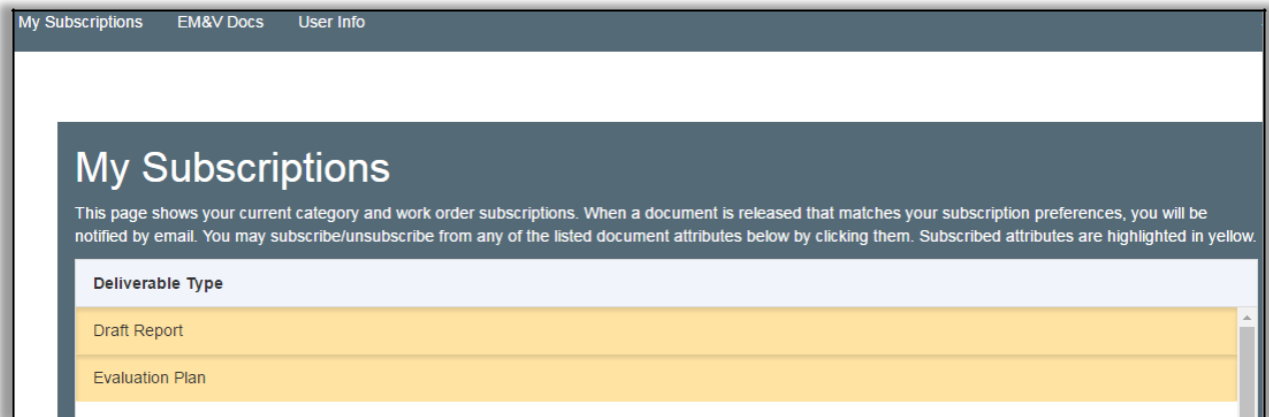
Subscribing to Document Attributes

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

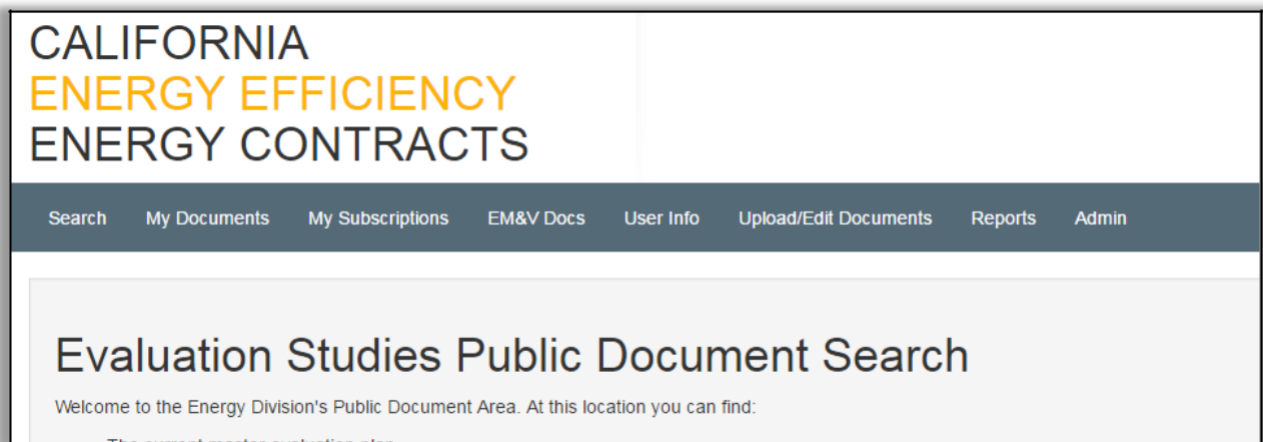
The PDA site provides CPUC staff the opportunity to create documents for public review and discussion. Documents can revolve around a specific CPUC contract or just general topics of interest.

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/EDIT 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.

The screenshot shows a 'Search Results' interface. At the top right, there is a 'Search Results List' and a 'Download' button. Below this is a pagination control with buttons for 'First', '<', '1', '2', '3', '4', '5', '...', '130', '>', and 'Last'. The main content area displays a document titled 'This is a Test Document' with a 'Comments End' date of 3/23/17 and a 'Published' date of 3/22/17. The document text reads: 'This document will be used for the user guide.' At the bottom right of the document content, there are 'Comments' and 'Download' buttons. Below the document content, a file icon and the name 'PSr User Guide (2).docx' are visible.

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.

The screenshot shows the 'My Documents' page. At the top right, there is a 'Download' button. Below this are 'Cycle:' and 'Filter:' dropdown menus, and a 'Sort By:' dropdown menu set to 'Date'. The main content area displays a list of documents. The first document is titled 'This is a Test Document' with a 'Comments End' date of 3/23/17 and a 'Published' date of 3/22/17. The document text reads: 'This document will be used for the user guide.' At the bottom right of the document content, there are 'Comments', 'Download', 'Subscribe', and 'My Documents' buttons. The 'My Documents' button is highlighted in yellow. The second document is titled 'Test' with a 'Comments End' date of 3/13/17 and a 'Published' date of 3/13/17. The document text reads: 'How many attachments?'. At the bottom right of the document content, there are 'Comments', 'Download', 'Subscribe', and 'My Documents' buttons. The 'My Documents' button is highlighted in yellow.

Viewing Comments

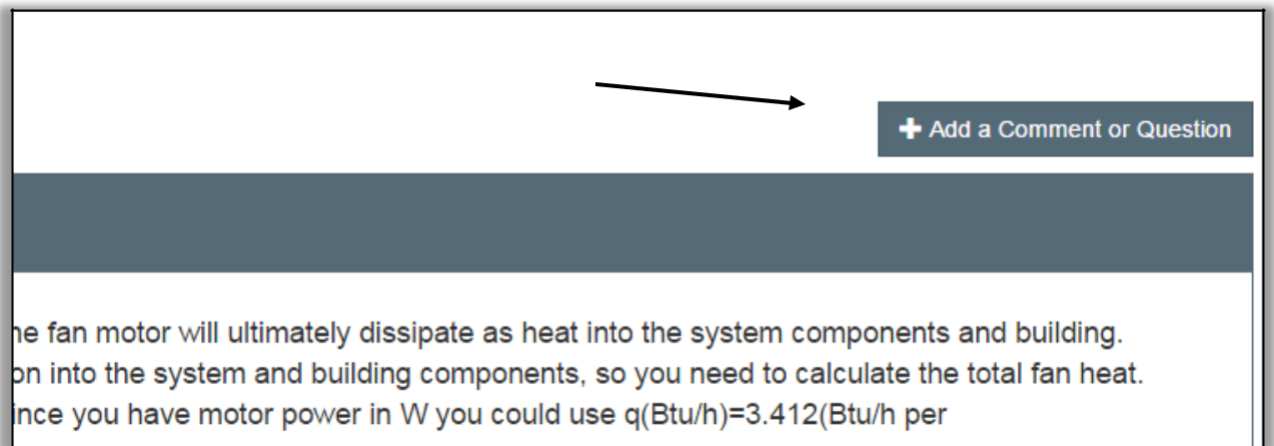
Click on the **SEARCH** tab to search for the public document. Select the criteria to search for your document. To see if there are comments available for viewing, click **COMMENTS**.

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:

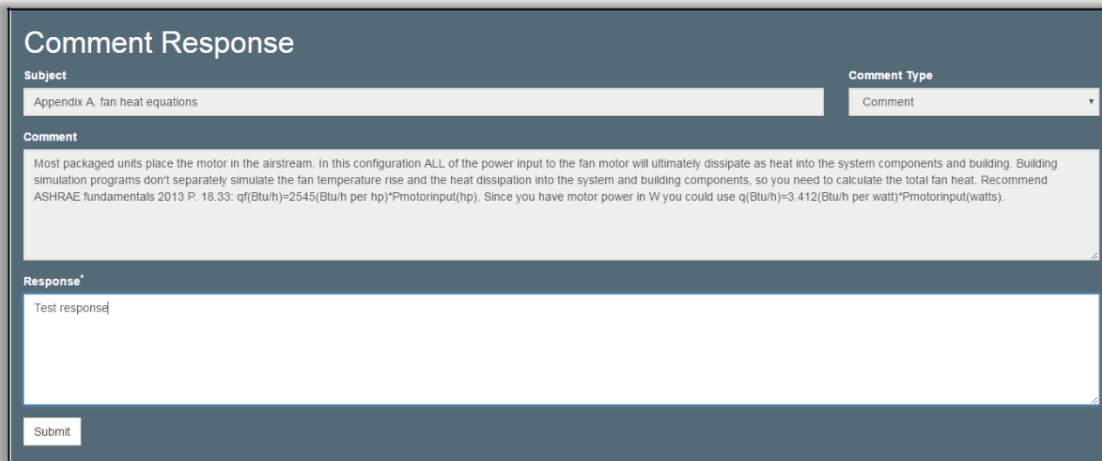
1. Click **ADD A COMMENT OR QUESTION** to add your comment or question.



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.
 - a. 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.
 - a. 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.



Comment Response

Subject: Appendix A. fan heat equations

Comment Type: Comment

Comment: Most packaged units place the motor in the airstream. In this configuration ALL of the power input to the fan motor will ultimately dissipate as heat into the system components and building. Building simulation programs don't separately simulate the fan temperature rise and the heat dissipation into the system and building components, so you need to calculate the total fan heat. Recommend ASHRAE fundamentals 2013 P. 18.33: $q_f(\text{Btu/h})=2545(\text{Btu/h per hp}) * P_{\text{motorinput}}(\text{hp})$. Since you have motor power in W you could use $q(\text{Btu/h})=3.412(\text{Btu/h per watt}) * P_{\text{motorinput}}(\text{watts})$.

Response: Test response

Submit

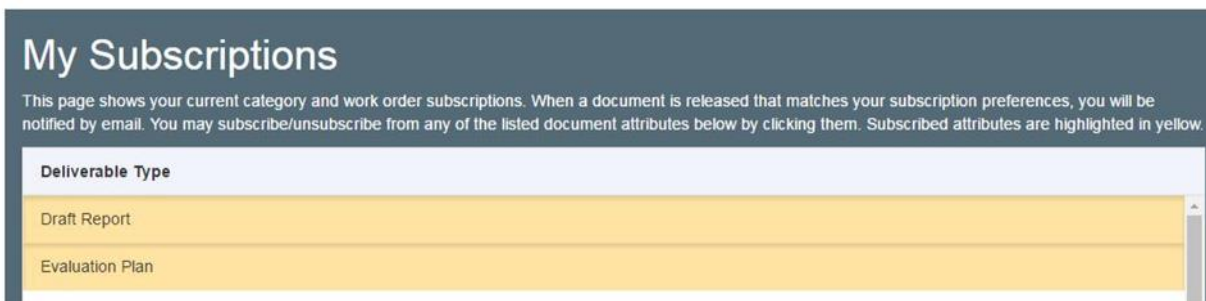
Subscribing to Document Attributes

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.



My Subscriptions

This page shows your current category and work order subscriptions. When a document is released that matches your subscription preferences, you will be notified by email. You may subscribe/unsubscribe from any of the listed document attributes below by clicking them. Subscribed attributes are highlighted in yellow.

Deliverable Type
Draft Report
Evaluation Plan

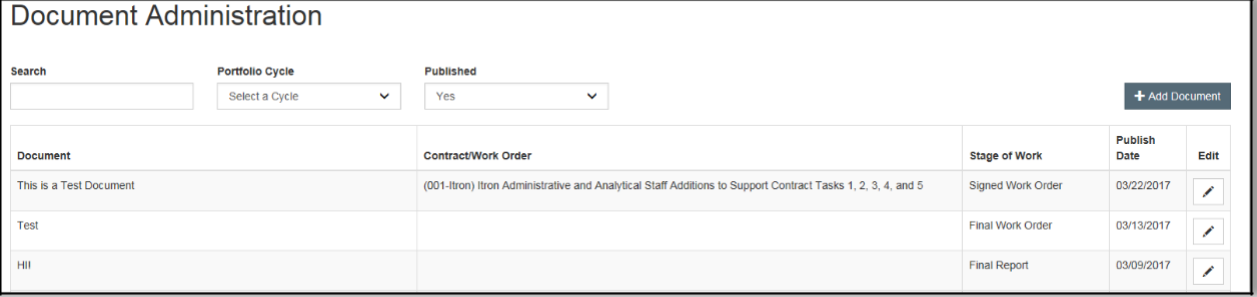
Your preferences are highlighted in yellow. Simply click the option again to unsubscribe from categories and work orders.

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 screenshot shows the 'Document Administration' interface. At the top, there is a search bar and two filters: 'Portfolio Cycle' (a dropdown menu with 'Select a Cycle' selected) and 'Published' (a dropdown menu with 'Yes' selected). A '+ Add Document' button is located in the top right corner. Below the filters is a table with the following columns: Document, Contract/Work Order, Stage of Work, Publish Date, and Edit. The table contains three rows of data:

Document	Contract/Work Order	Stage of Work	Publish Date	Edit
This is a Test Document	(001-Itron) Itron Administrative and Analytical Staff Additions to Support Contract Tasks 1, 2, 3, 4, and 5	Signed Work Order	03/22/2017	
Test		Final Work Order	03/13/2017	
Hill		Final Report	03/09/2017	

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.*



The screenshot shows the 'Add New Document' form. It has a dark blue header with the title 'Add New Document'. Below the header are four sections, each with a light blue background and a '+ Choose File' button:

- Title**: A text input field.
- Summary**: A text area for entering a summary.
- Document**: A section for uploading the main document.
- Attachments**: A section for uploading additional attachments.

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**.

The screenshot displays a form for editing document attributes, organized into three columns and several rows. Each column has a 'Select All' link at the top. The first column contains dropdown menus for 'Sector' (with options: Agricultural, Codes & Standards, Commercial, Cross Cutting, Industrial), 'Stage of Work' (with option: --Select--), 'Published' (with option: Yes), and 'Work Order' (with option: --Select--). The second column contains dropdown menus for 'Study Type' (with options: Evaluation Guidelines, Impact Evaluation, Market Effects, Market Study, Master Joint Evaluation Plan), 'Deliverable Type' (with option: --Select--), and 'Evaluation Firm' (with option: --Select--). The third column contains dropdown menus for 'Technology Type' (with options: Agricultural Process, Building Envelope, Codes & Standards, Custom and Process, Education & Training), 'Study Lead' (with option: --Select--), and 'Portfolio Cycle' (with option: --Select--). At the bottom right, there are two input fields for 'Comment Start' and 'Comment End'. A 'Submit' button is located at the bottom left of the form.

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.

PDA Site Administration

- Category Administration**
Update the options that appear for each category for document upload.
- EM&V Document Administration**
Update the documents that appear in the EM&V search list.
- Create Subscriber Email List**
Generate a custom email list based on users subscribed to various document attributes.

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.

EM&V Document Administration

Search

[+ Add Document](#)

Document	Summary	Published	Actions
Test EMV	Test EMV Upload	03/14/2017	 
2013-2017 Energy Division & Program Administrator Energy Efficiency EM&V Plan (Version 7)	The evaluation measurement and verification (EM&V) plan for the (IOUs) energy efficiency programs expands on the Energy Division's energy efficiency work and oversight in its objectives and administration. The EM&V plan supports oversight of the program administrators portfolio of energy efficiency programs.	01/19/2017	 

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:

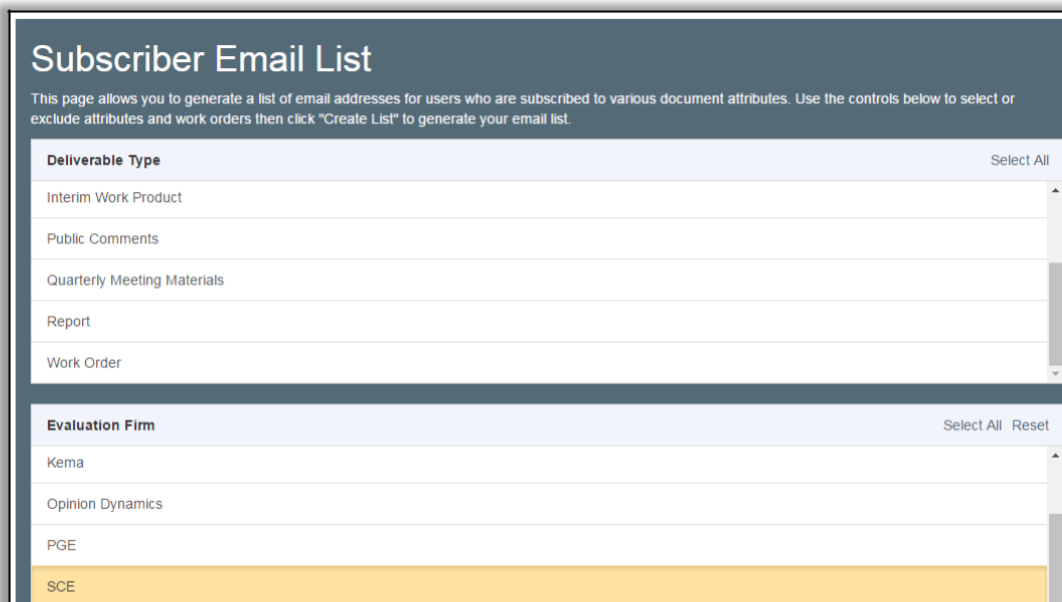
1. At the **ADMIN** tab, click the **EM&V DOCUMENT ADMINISTRATION** link.
2. Next to each document is an **EDIT** link. Choose the appropriate document and click **EDIT**.
3. Select the  icon to delete the document. Please note that the document is deleted
4. immediately after you click the button.

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.
 - a. Selected attributes are highlighted yellow. Go throughout the list and select your desired attributes, then select **SUBMIT**.
 - b. 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.
2. 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.



Subscriber Email List

This page allows you to generate a list of email addresses for users who are subscribed to various document attributes. Use the controls below to select or exclude attributes and work orders then click "Create List" to generate your email list.

Deliverable Type	Select All
Interim Work Product	
Public Comments	
Quarterly Meeting Materials	
Report	
Work Order	

Evaluation Firm	Select All	Reset
Kema		
Opinion Dynamics		
PGE		
SCE		

UTILITY STAFF

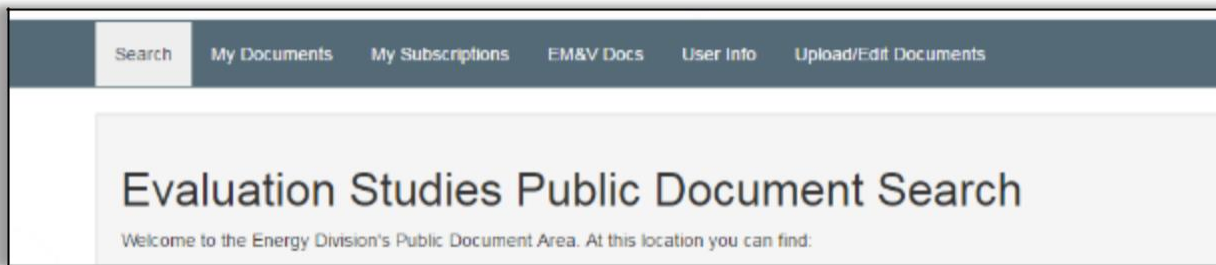
Utility staff may view topics created by ED staff and look at related documents, such as impact reports, evaluation plans, supplemental information and the opportunity to subscribe to topics of interests; draft documents, notes, and comments relating to topics are available to view and comment upon, 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.

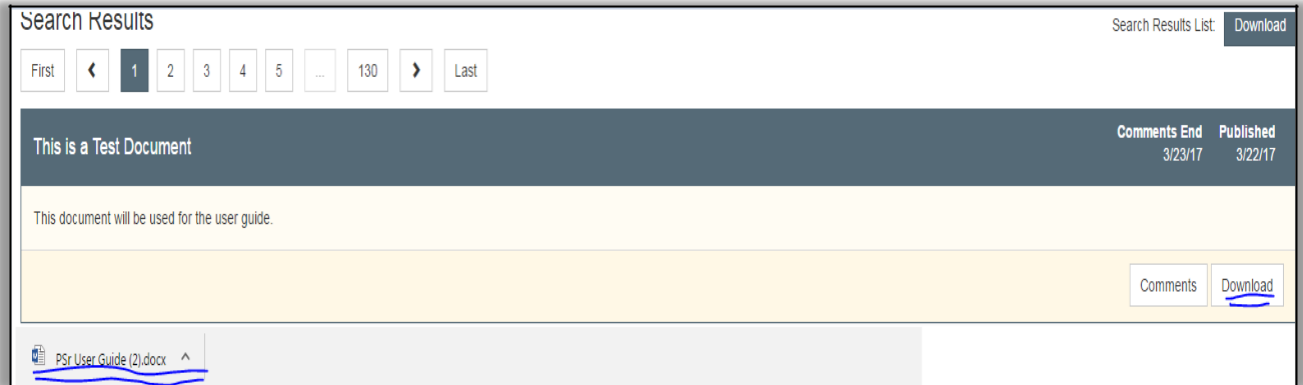
User Info Tab

This tab allows you to update your user information.

System Capabilities

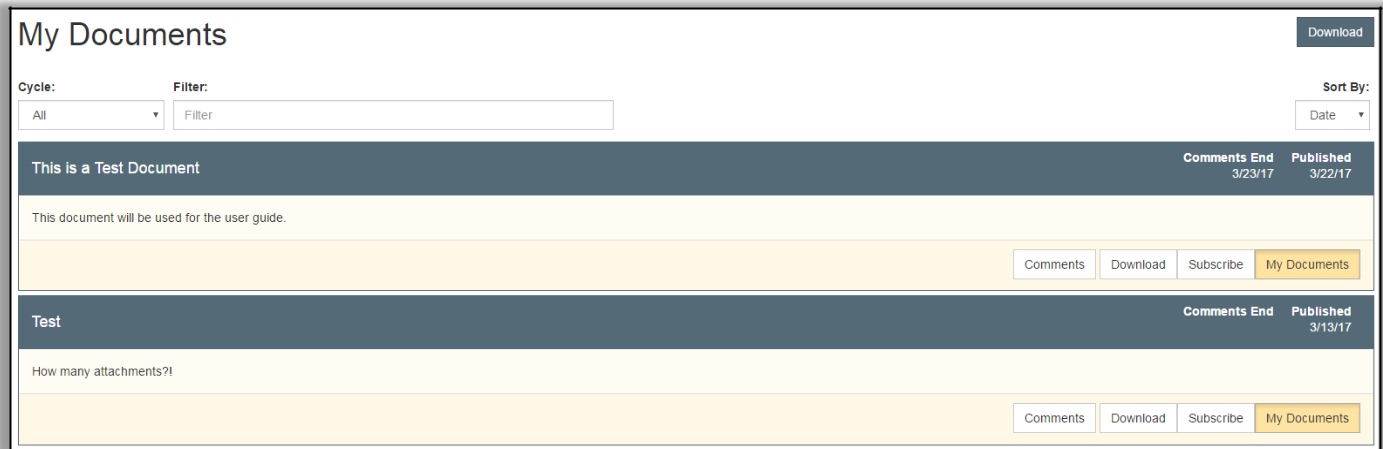
Search Documents

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.

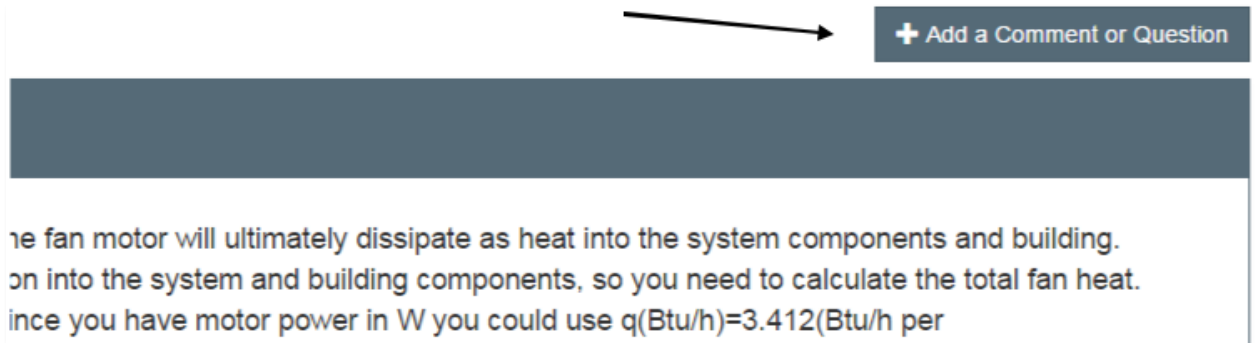


Viewing Comments

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.
 - a. 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.
 - a. 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.

The image shows a "Comment Response" form. It has a dark blue header with the title "Comment Response". Below the header, there are two input fields: "Subject" with the text "Appendix A. fan heat equations" and "Comment Type" with a dropdown menu showing "Comment". Below these is a "Comment" field containing a large block of text: "Most packaged units place the motor in the airstream. In this configuration ALL of the power input to the fan motor will ultimately dissipate as heat into the system components and building. Building simulation programs don't separately simulate the fan temperature rise and the heat dissipation into the system and building components, so you need to calculate the total fan heat. Recommend ASHRAE fundamentals 2013 P. 18.33: $q(\text{Btu/h})=2545(\text{Btu/h per hp})\cdot P_{\text{motorinput}}(\text{hp})$. Since you have motor power in W you could use $q(\text{Btu/h})=3.412(\text{Btu/h per watt})\cdot P_{\text{motorinput}}(\text{watts})$ ". Below the comment field is a "Response" field with the placeholder text "Test response". A yellow arrow points to this field.

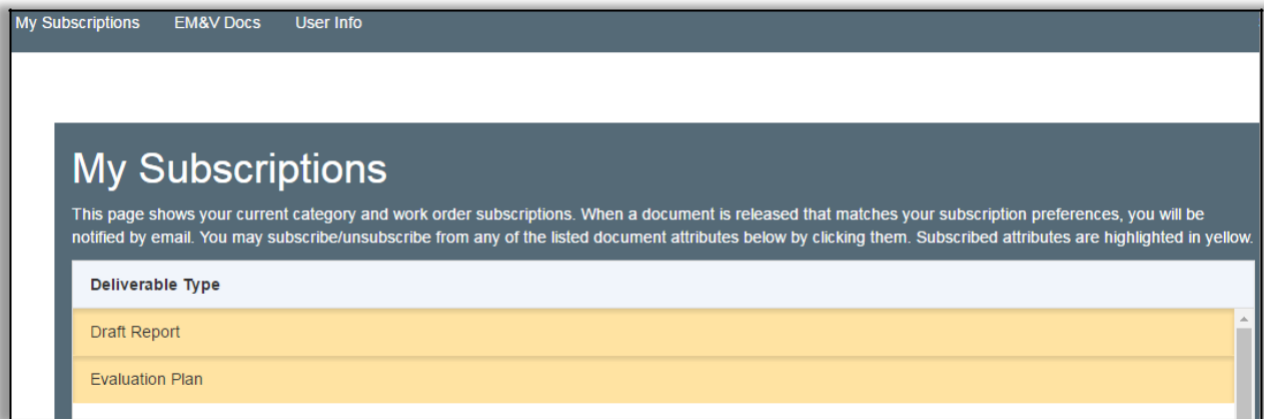
Subscribing to Document Attributes

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.



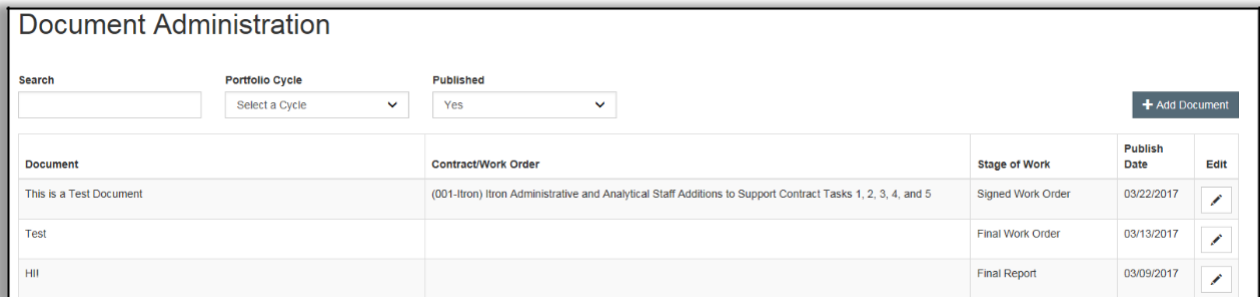
Your preferences are highlighted in yellow. Simply click the option again to unsubscribe from categories and work orders.

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 screenshot shows the 'Document Administration' interface. At the top, there are three filters: 'Search' (a text input field), 'Portfolio Cycle' (a dropdown menu with 'Select a Cycle' selected), and 'Published' (a dropdown menu with 'Yes' selected). To the right of these filters is a '+ Add Document' button. Below the filters is a table with the following columns: 'Document', 'Contract/Work Order', 'Stage of Work', 'Publish Date', and 'Edit'. The table contains three rows of data:

Document	Contract/Work Order	Stage of Work	Publish Date	Edit
This is a Test Document	(001-Itron) Itron Administrative and Analytical Staff Additions to Support Contract Tasks 1, 2, 3, 4, and 5	Signed Work Order	03/22/2017	
Test		Final Work Order	03/13/2017	
HI1		Final Report	03/09/2017	

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.*



The screenshot shows the 'Add New Document' form. It has a dark blue header with the title 'Add New Document'. Below the header are four sections: 'Title' (a text input field), 'Summary' (a larger text input field), 'Document' (a section with a '+ Choose File' button), and 'Attachments' (a section with a '+ Choose File' button).

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**.