

Project Status Report User Guide

Version 2.0 (Revised May 2020)

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Introduction

Purpose and Capabilities

The Project Status Report (PSR) site is a project management system used by the Energy Division and its contractors to track ED evaluation projects. Once a project has been entered into the site, the project manager can edit and update the details of that project in an ongoing manner until the project's completion. A budget report for these projects can also be found on the PSR.

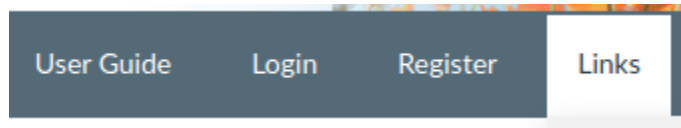
Users

The system supports three different user types, each with the capability to edit specific projects unique to their designation. The only difference between the three user types lie in which projects they can edit.

- Energy Division (ED) user
- Investor Owned Utility (IOU) user
- Regional Energy Network (REN) user

Logging in

To login, please go to <https://psr.energydataweb.com/> and click on the login link in the upper right-hand corner. If you are not yet a user of the PSR, please contact support@energydataweb.com and request that you be added as a user.



This will take you to the login page. Once there, enter your email address and password. If you do not yet have a password or if you have forgotten it, please click the **Click here to reset your password** link. Follow the instructions then return to the login page to login to the PSR.

Sign In

Email

Password

[Click here to reset your password.](#)

Submit Query

If at any point you have trouble logging in to the site, please clear your browser's cache and try again. Instructions for clearing your cache can be found here: <https://www.refreshyourcache.com/en/home/>. If this does not work, please contact support@energydataweb.com.

Searching for Projects

The PSR features robust search capabilities that enable users to locate projects quickly and efficiently.

Search Box


The search box allows users to enter any text that might appear in any column of the PSR and dynamically see search results. Users may choose to ask to search in only certain columns using the **Filter Specific Columns** filter and may also check the **Case Sensitive** box to make the search case sensitive.



The screenshot shows a dark blue header bar. On the left, it says "Filter Projects By:" followed by a white search input box. On the right, it says "Case Sensitive" with an unchecked checkbox. Below this bar is another dark blue bar with the text "Filter Specific Columns" and a link "reset to defaults" in blue. Below that is a light gray dropdown menu with a downward arrow on the right.

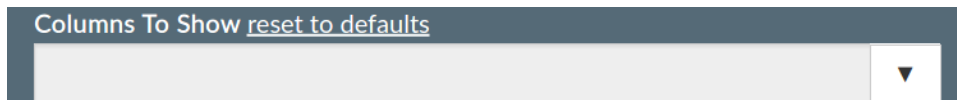
Search Filters

Users can filter search results with six different filters. Projects can be filtered by Project Status, Study Manager, Sector, Study Type, Study Lead and Funding Cycle. One or more of these can be selected at a time to filter search results.



The screenshot shows a dark blue header bar with six dropdown menus arranged in two rows of three. The first row contains "Funding Cycle", "Project Status", and "Sector". The second row contains "Study Lead", "Study Type", and "Study Manager". Each dropdown menu has a light gray background and a downward arrow on the right.

Users may also choose which columns to show in the search results using the "Columns to Show" filter.



The screenshot shows a dark blue header bar with the text "Columns To Show" and a link "reset to defaults" in blue. Below this is a light gray dropdown menu with a downward arrow on the right.

Editing Projects

PSR users who have logged in are able to edit projects unique to their designation. Energy Division users can edit ED projects while Investor Owned Utility users can edit IOU projects.

Please note that users cannot add projects to the PSR. Projects may only be added to the PSR by emailing support@energydataweb.com with the information needed to fill in the fields for that project.

Editing a Project

Once you have logged into the PSR and have found the project you wish to edit using the search features of the website, click on the project you want to edit from the search results.

This will bring you to the Project Information page.

Project Information				
Project Number	Budget	Funding Cycle	Project Status	WO Lead
521	\$100,000	2019,2020	Combined	
XRef Number	Study Manager	ED Program Manager	Sector	
	SDG&E		Cross-Cutting	
Sub-Sector	Completion Date	Next Activity Description	Next Activity Due Date	
Cross-Cutting	12/07/2019			
Next Activity Due Time	Study Type	Plan Posted To PDA	ED Consultants	
12:00 AM	Process Evaluation			
PG&E Contact	SCE Contact	SDG&E Contact	SCG Contact	
Project Coordination Group	PCG Coordinator	PCG ED Rep	PCG Other ED	
CALMAC ID - If none type N/A				
asdf				

Research Questions (1500 characters max)

Combined with Study 2228.

Notes (500 characters max)

Combined with Study 2228.

Project Description (1000 characters max)

Combined with Study 2228.

Scroll down to the bottom of the **Project Information** page. Here you will find the **Edit** button.

Once you have clicked **Edit**, the fields on the **Project Information** page will become editable and you can enter or edit the information there.

Reports

Users can access Database Reports to export the results of their findings.

Database Reports

Users may also create reports of the projects within the PSR database. These reports may be exported into an excel (.csv) or pdf format. There are two types of database reports. The first is a report that lists all projects in the PSR database. The second is a report for only those projects currently displayed within the search results window.

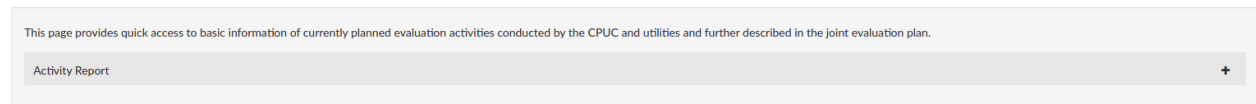
Select an **Export Format** of either **csv** or **pdf** from the dropdown list. Users may **Export Current View** in either pdf or csv format, or **Export Full Report** as a csv.



Activity Report

The Activity Report displays information regarding when projects on the PSR are supposed to be updated next as well as the most recently updated projects.

To access the Activity Report, click the + symbol on the Activity Report bar.



Doing so will bring two lists: the first list depicts upcoming activity for projects while the second list shows the most recently updated projects. These lists update dynamically.