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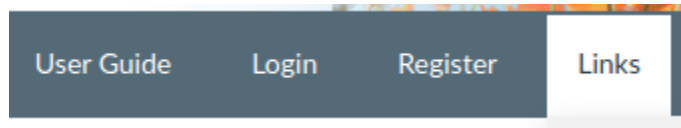
This will take you to the login page. Once there, enter your email address and password. If you do not yet have a password or if you have forgotten it, please click the **Click here to reset your password** link. Follow the instructions then return to the login page to login to the PSR.

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.
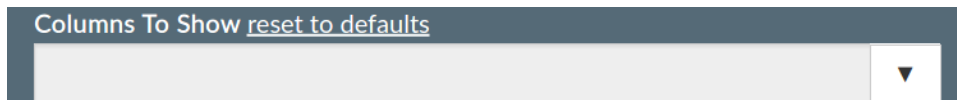

Search Filters

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.

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

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.

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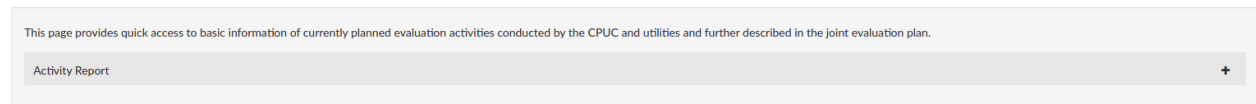
Select an **Export Format** of either **csv** or **pdf** from the dropdown list. Users may **Export Current View** in either pdf or csv format, or **Export Full Report** as a csv.

Select Export Format | csv ▼ | Export Current View | Export Full Report

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.

This page provides quick access to basic information of currently planned evaluation activities conducted by the CPUC and utilities and further described in the joint evaluation plan.

Activity Report   **+**

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.