

## Process for Submitting a Report to the CALMAC Searchable Database

This document outlines the process for submitting a report on a project that has been conducted using Public Good Charge (PGC) funds, or other public funding, to the CALMAC searchable database.

The first criterion is that the report be a final version, draft reports are not posted on the website. Once the report has been finalized and accepted by the entity managing the study (Note: Energy Efficiency impact studies also need to be reviewed and accepted by the CPUC), the Managing Entity, or the author at the Managing Entity's direction, completes each of the following steps:

1. Obtain the next consecutive report "Study ID" number from the CALMAC Website Administrator (there is a hotlink to email the CALMAC Website Administrator in the lower left corner of every CALMAC.org page, or simply email Admin@CALMAC.org) and place that number clearly on the cover of the report. There is no "standard format" for report covers for reports submitted to the CALMAC searchable database, however it is highly recommended that the information on the report cover should encompass all of the fields required on the report submission screen discussed below, with the exception of (1) the summary, (2) the number of pages, and (3) the file size. An example title page is shown in Attachment 1.
2. All reports should contain an executive summary. In addition, the source of the project funding should be mentioned early and prominently in the report. For example, for PGC funded studies the following text should appear:

This study was conducted at the request of the California Public Utilities Commission. The study was managed by (Managing Entity). It was funded through the public goods charge (PGC) for energy efficiency and is available for download at [www.calmac.org](http://www.calmac.org).

Similar wording should be used for other funding sources. It is recommended that it appear in the introduction section of the report.

3. Create an electronic version of the report for submission to the CALMAC website. While the Adobe PDF format is the preferred/predominant format, Microsoft Word or Excel files are also accepted. While we recommend that the reports be a single electronic file, if possible, we recognize that some reports are so large that they must be issued as separate volumes. The system is set up to handle separate volumes, if necessary. No matter what type of electronic file you are submitting, please be sure that it is not locked or password protected. CALMAC creates an executive summary of the report for easy download and review by extracting a file that includes everything from the cover page to the end of the report executive summary. To do this the report has to be unlocked.
4. Submitting Electronic Copy:
  - a. Go to [www.CALMAC.org](http://www.CALMAC.org) on the Internet, and select the Administration page from the bottom of the menu on the left hand side of the page.

- b. On the Administration page, scroll down to the bulleted area in the middle of the page and select the bullet titled “Reports to be posted to our searchable database”. This is a hot link that takes you to the report submission form. The submission form has been reproduced in Attachment 2 for submitters planning purposes.
- c. Fill out the form using the information from the report cover and the data on the electronic file. The questions are pretty self evident in most cases. As discussed above, except for the summary, number of pages in the PDF and the electronic file size, all of the information being sought should be on the cover of the report. The following are helpful hints for filling out the form.
  - i. Study ID: This is the consecutive number that you obtained under step 1 above.
  - ii. Report Type and Report Category: You can check more than one category if your report covers more than one type of study (e.g., EE and DR, or impact and process).
  - iii. Implementer: For database integrity reasons, you are only allowed to select one Implementer. If there are multiple entities managing your project, select the primary one that project managed the study.
  - iv. Title: Please type the title EXACTLY as it is on the cover of the report.
  - v. Abstract: When creating the abstract, please use language a layman can understand, focusing on the objectives of the study and the bottom line results. Make sure abstract includes all key words pertaining to your report so the search engine can find it. Abstracts are limited to 3,500 characters. The abstract is important because Simple Searches hunt through the abstract for the words typed in for the search. We suggest that you use close to the 3,500 characters allowed and be sure that you include all of the key phrases that describe your study. While it is tempting to quickly write a one line description of your report to get through the process of submitting the report, this will do your hard work a disservice because it will minimize the probability of your study being found by the simple search
  - vi. Program Year: As the format shows, if your study covers more than one program year, enter each year separated by a comma (no spaces). If it covers a range of years, type each year in. Again, this is to allow the search to work properly.
  - vii. Primary Author: Select the name of the primary or lead author. Please look at all of the names carefully before entering a name in the “If Other:” box, so we don’t get duplicate names.
  - viii. Other Authors: Select the names of subcontractors or other contributing authors. Hold down the “Control” key to select more

than one Other Author. Again, please look carefully before entering a name in the “If Other:” box, so we don’t get duplicate names.

- ix. Other Study IDs: These optional fields are for other identifications numbers that may be issued by the CPUC, your company or other entities to identify the project/report. Entering an ID number here will allow the report to be retrieved from the database simply by entering that number into the Simple Search function. These numbers may appear on the cover of the report. Often CPUC program numbers are entered here.
  - x. Total Report Pages: While you can count all of the pages in the report, the easy method is to open the PDF and see what it says at the bottom of the Acrobat window. The total number of pages is listed there. If there are more than one volume of the report, this values should be the number of pages in this volume.
  - xi. Sector: Again, you can select more than one sector if it applies. For now we are limiting the study sectors to these very standard categories. If you feel strongly that added categories are needed for your report, we suggest that you select the closest one and send an email to the Site Contact by clicking the button in the lower left of the screen and explaining why additional categories are necessary.
  - xii. Volume?: This check box allows you to submit a volume (or appendix or attachment) to a report that you have previously submitted, but didn’t add a volume to at the time. Check this box if that is what you are doing.
  - xiii. Your Email Address: Your email address is important if we have issues we need to clear up about the report you are submitting, so please enter it carefully.
  - xiv. Attach Report File: Use the browse button to find and attach the electronic copy of the report you are submitting.
  - xv. Select which type of “submit” button you need. If your report is one volume, and you wish to submit the report and exit the process, click the Submit button. If your report has several volumes and you wish to submit the other volumes at this time, the select the Add Volume button. This submits the information and electronic file that you have just entered, and takes you to a page to enter the information on the sub volumes of that report. The questions asked on the Add Volume page are the same as above.
- d. You have completed the electronic submission, but don’t forget to submit a hard copy of the report to the Website Librarian as describe below.
5. Submit one double-sided bound copy of the report you have just submitted to the address listed by clicking the Website Librarian hotlink at the bottom of the form.

6. Once the electronic file is submitted and the paper copy is in the mail, you have completed your task. The following steps should occur automatically.
7. The report information will be reviewed by the database administrator and normally within about 72 hours of the report submission the report will be:
  - a. Posted on the New Publications page for 90 days, after which time it will be automatically removed.
  - b. Entered in the searchable database immediately so any queries looking for it will find it.
  - c. An announcement of the posting of the report will go out to the CALMAC Announcement list serve, supplying list serve subscribers the key information on the report and showing a direct link to the report.
  - d. Searchable database users will be able to download the electronic file of the report from the CALMAC Website once it is posted. So if someone requests a copy of the report from you, you can simply direct him or her to the CALMAC Website Searchable Database. The fastest way for them to find the report on the searchable database is to simply type the CALMAC Study ID into the Search Text window and hit the Search button.
8. Be aware that this process simply submits the report to the CALMAC community. If you wish, you may independently copy the report (in either hard copy or electronically) to other targeted members of the community that you choose. In addition, you can submit a Non Technical Overview of your report to be attached to the report. These Non Technical Overviews supply a quick review of the key findings of the reports, along with the report. A button for submitting these Overviews, along with a format, is available on the CALMAC Administration page.

Attachment 1  
Example Report Cover Sheet

**PACIFIC GAS & ELECTRIC COMPANY  
2002 EXPRESS EFFICIENCY  
ENERGY AND DEMAND IMPACT STUDY**

Program Year and  
Name in title.

**Study ID: PUC0012.01**

Number from  
CALMAC Admin.

**FINAL REPORT**

**VOLUME 1 OF 2  
Main Report**

Clearly states # of  
volumes and name  
of this volume.

Prepared for  
**Arnold Schwarzenegger, Project Manager  
Green Energy Company  
Sacramento, California**

Names of  
personnel optional.

Prepared by  
**Principal Investigators: Frank Zappa and Jennifer Lopez  
Wanna Do Good Consulting Inc.  
San Fernando, California**

**April 17, 2003**

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Attachment 2 – Report Submission Screen (in 4 sections)

### Reports to be Posted to our Searchable Database

You have chosen to submit a report for posting on the CALMAC searchable database. In order to accurately record your report in the database and make sure that searches work correctly, we need you to fill out the information below. When you have completed the form, attach an electronic copy of your report in PDF format and press the Submit button. The only additional step after that is to mail a paper copy of the report to the Website Librarian at the address listed below.

Note: All fields are required		
CALMAC ID:	<input type="text"/> <u>Lookup ID</u> Format: AAA9999.99	Provided to you by the CALMAC administrator and allows the report to be retrieved from the database simply by entering the number into the Simple Search function. This number should appear on report cover.
Report Type:	<input type="checkbox"/> Energy Efficiency <input type="checkbox"/> Demand Response <input type="checkbox"/> Low Income	Check more than one report type if your report covers more than one type (e.g., Energy Efficiency and Demand Response).
Report Category:	<input type="checkbox"/> Evaluation Guidelines <input type="checkbox"/> Impact Evaluation <input type="checkbox"/> Market Effects <input type="checkbox"/> Market Study <input type="checkbox"/> Measure Retention <input type="checkbox"/> Process Evaluation <input type="checkbox"/> Program Design Other: <input type="text"/>	Check more than one category if your report covers more than one type of study (e.g., Impact Evaluation and Process Evaluation).
Implementer:	<input type="text" value="ADM Associates, Inc."/> Alliance to Save Energy American Synergy Corporation Association of Bay Area Governm ASW Engineering BO Enterprises California Building Performance C California Center for Sustainable E	You are only allowed to select one implementer. If there are multiple implementers, select the implementer that project managed the study. If the Implementer doesn't appear in the list, contact the <a href="#">Website Administrator</a> .

Complete Title:

Please enter exactly as on cover of report

Publication Date:

 (mm/dd/yyyy)

Abstract:

When creating the abstract, please use language a layman can understand, focusing on the objectives of the study and the bottom line results. Make sure abstract includes all key words pertaining to your report so the search engine can find it. Abstracts are limited to 3500 characters.

The abstract is important because Simple Searches hunt through the abstract for the words typed in for the search. We suggest that you use close to the 3500 characters allowed and be sure that you include all of the key phrases that describe your study. While it is tempting to quickly write a one line description of your report to get through the process of submitting the report, this will do your hard work a disservice because it will minimize the probability of your study being found by the simple search.

Program Year:

 format: YYYY,YYYY

Primary Author:

AAG & Associates  
ACEEE  
ADM  
Aloha Systems  
Alternative Energy Systems Consulting, Inc. (AESC)

If Other:

Other Authors:

AAG & Associates  
ACEEE  
ADM  
Aloha Systems  
Alternative Energy Systems Consulting, Inc. (AESC)

If Other:

Other Study IDs:	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	<p>These optional fields are for other identifications numbers that may be issued by the CPUC, your company or other entities to identify the project/report. Entering an ID number here will allow the report to be retrieved from the database simply by entering that number into the Simple Search function. These numbers may appear on the cover of the report.</p>
Total Report Pages:	<input type="text"/>	<p>Open the PDF and see what it says at the bottom of the Acrobat window. The total number of pages is listed there.</p>
Sectors:	<p>Check all appropriate sectors covered by report</p> <p><input type="checkbox"/> Agricultural</p> <p><input type="checkbox"/> Commercial</p> <p><input type="checkbox"/> Industrial</p> <p><input type="checkbox"/> New Construction</p> <p><input type="checkbox"/> Residential</p>	<p>You can select more than one if it applies.</p>
Volume?:	<p>Check if this is a volume to a publication that has previously been uploaded to <a href="http://www.calmac.org">www.calmac.org</a> <input type="checkbox"/></p>	
Your E-Mail Address:	<input type="text"/>	
Attach Report File:	<input type="text"/> <input type="button" value="Browse..."/>	<p>Click <b>Browse</b> and select a file.          If you do not see a "Browse" button, your browser does not support file uploading.          If you are uploading a large file from a dial up modem or a slow connection, you may experience problems submitting your report. If you do experience problems, please submit your report directly to the <a href="#">Site Administrator</a>.</p>
	<input type="button" value="Submit"/>	<p>Submit this publication and return to the Administration page</p>
	<input type="button" value="Add Volume"/>	

Add Volume

Submit this publication and continue entering volumes\appendices associated with the first publication submitted in this session.

**Don't forget to mail a paper copy of the report to the Website Librarian**

**Thank you for submitting a report!**