

PUBLIC UTILITIES COMMISSION

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To: Sempra, SoCalGas, PG&E, SCE (Joint IOU) Data Managers

From: CPUC Energy Division

Subject: Energy Efficiency Q12 Program Tracking Data Reporting

Please refer to the following guidelines when submitting Q12 energy efficiency program reporting data.

Special Instructions for Q12:

Energy Upgrade California: As discussed during the February 5th Data Management Coordination meeting, the Energy Division Data Management Team (DMT) has added an indicator for claims that are part of the Energy Upgrade California (EUC) program to the reporting specification (spec.) If a program is entirely EUC, submit a list of all such programs to the DMT and ignore the *EnergyUpgradeCaliforniaFlag* in the **Claim** table. This can be submitted as a separate worksheet or filled out in the **E3lkup_EEGA2010ProgramDefinition** table in the Access file (see *EnergyUpgradeCaliforniaFlag*) and returned with the quarterly submission. If your programs are not entirely EUC, please insert flag values into the **Claim** table.

Updates to Q12 Data Spec:Claim Table:

EnergyUpgradeCaliforniaFlag: Flag to indicate if claim is part of Energy Upgrade California (see above Special Instructions for Q12)

Implementation Table:

WorkpaperPendingApprovalFlag: Flag to indicate if workpaper is pending approval

SimpleDualBaselineFlag: Flag to indicate dualbaseline uses simple methodology

UnreviewedCustomFlag: Flag to indicate custom project is unreviewed

ABOUT THE TOOL

The Data Transfer Tool was created for the Q12 submission in order to standardize field names, data types, and submission formats across the IOUs. The new tool also allows the IOUs to QC their data for incorrect values and common E3 issues.

DEFINITIONS

Spec Tables – All tables with the “spec_” prefix. Spec_tables are pre-formatted tables for submitting quarterly data. The tables are configured with the correct field names and data types and will only accept data following the data type convention specified. These are the only tables that should be populated with IOU data.

QC Queries – Queries used for quality control. In the file, these queries are embedded in the queries section of the navigation panel. These queries are provided as a courtesy to enable IOUs to spot check data before submission. ED Data Team will continue to run these QC checks upon receiving quarterly submissions and provide feedback.

There are three types of queries:

1. **QC Data** – Checks for common data structure issues, such as claims without sites, claims without implementations, etc.
2. **QC E3** – Checks for potential errors when running the E3, such as claims with quantities but no savings, claims with incorrect climate zones, etc.
3. **QC Values** – Checks fields for correct values, such as MeasAppType, sourceDesc, etc.

While many of these checks indicate a problem that could prevent proper evaluation or savings calculation, some of the issues may be known or intentional depending on the specific IOU program and do not always indicate a problem with a claim. Please refer to the *CriticalCheck* column in the **meta_QUERIES** table for an indication of which issues are most important for data integrity and evaluation purposes.

The queries rely on all of the **lkup tables** (lookup tables) for established values to check against. Similarly, the **EDFilled** query calculates savings and is used for many of the E3 QC queries.

Meta Tables – Metadata tables. These contain information about the Data Transfer Tool and Data Spec. There are three tables:

1. **meta_TABLES** – Index of every table in the Access file. Provides descriptive information about the table.
2. **meta_QUERIES** - Index of all QC queries. Provides descriptive information about the query including standard SQL syntax.
3. **meta_DATA_SPEC** – Complete data specification. Provides a table, name, description, and SQL data type for each field (SQL Server, MySQL compliant).

USING THE TOOL

- A. Importing Data** – Access offers a number of different options for importing data. Access will natively connect to Excel spreadsheets, other Access databases, CSV files, and any ODBC database (with greater support for SQL Server Installations). All of these options can be found in the “External Data” tab. If importing Excel or CSV data choose ‘Append a copy of the records to table’. If importing or linking to data from another Access file or ODBC source, the imported table will simply duplicate the characteristics of the source table.

A note on file size: Access file formats are capped at 2gb and some IOUs may exceed this limit in the **Claim** table alone. Below we offer a few recommendations for working within those constraints:

- 1. Load partial data into several files.** Claims and / or Site data can be split across several files. If you plan to QC your submission in the Access file, all of the FEA data (**Implementation, Impact, Cost, Measure, EUL_RUL_NTG, and GSIA**) as well as the lookup tables should be present in each partial file. Depending on size, site data may also need to be split and / or separated. Because the in-file QC for Sites (Claims without Sites, Sites without Claims) requires both entities, we recommend running this QC on existing IOU databases prior to loading the data into Access or using linked tables.
- 2. Linked Tables.** A single Access file is able to link out to other tables residing in different Access files without adding data to the base Access file. Again, if this method is chosen we recommend linking out only to the Claim and / or Site table and keeping the FEA data intact in the base file for simplicity sake. Queries will need to be edited to reflect any new linked table names.

NOTE: We recommend the ‘partial data in multiple files’ approach. If using Linked Tables, the linked entities MUST be other Access files for the final submission.

B. Using the quality control queries

The QC queries are configured to run once valid data is inserted into the Access file. Each query can be run by double clicking its name in the Navigation tab. If there are errors found, the results window will show (in general) an identifier, invalid values, and counts of the error. Standard SQL syntax is provided in the **meta_QUERIES** table if you wish to run the QC on an external database. If you do want to QC on your own database remember to either create an EDFilled view or separate table.

C. Using Meta tables

While these tables are provided primarily as a descriptive reference of all of the tables and queries in the file, they may also be of use in extracting field names, data types, and SQL syntax for use outside of Access. For example, when creating a table on an external database, field names can be easily extracted from the tool by simply copying and pasting out of the **meta_DATA_SPEC** table. Similarly, query definitions and standard SQL code are provided in the **meta_QUERIES** table in case an IOU would prefer to run QC on their own systems.