SMART GRID.GOV

Smart Grid Data Hub
Instructions for Reviewing Data Submissions

Overview

In your role as a reviewer, you will be determining data correctness in the submissions for the Smart Grid Data Hub (Data Hub)— projects funded under the Smart Grid Investment Grant (SGIG) and Smart Grid Demonstration Projects (SGDP).

This document will give you an overview of your process as a data reviewer. It will not cover how to submit data to the Data Hub.

As a reviewer, you should have been given a login ID and a password. If you do not have these system credentials, please contact your project administrator.

Overview of Your Job As A Reviewer

The general process for data submission follows the six steps outlined below.

1. Project teams collect and record data.
2. Project teams upload data to the Data Hub. As the data are uploaded, they are checked for basic form errors (like missing required data and letters in number-only fields). Data that do not pass the check are not accepted.
3. Once the data has passed the check and are received by the Data Hub, they move to "submitted" status and a reviewer is alerted. At this point, the reviewer completes another check to ensure that the data are reasonable. For example, if a project only has 10,000 households but the data show that 100,000 meters were installed, the reviewer would flag that as a potential error and ask for clarification.
4. If the data pass this check, the process continues at Step 5. If the reviewer has questions, the submission is returned to the project team for correction with a "Reviewed" status. The project team will update the data as appropriate and start the process again at Step 2.
5. Once the reviewer has accepted the data, they become available in the Data Hub reporting structure. In most cases the process stops here.
6. If the project team finds errors in the reported data, they contact the reviewer and ask to change the status of the data submission back to "Reviewed." Then the project team submits the corrected data and the process continues again at Step 2.

Categorizing the Status of A Submission

During your review process, a data submission will be categorized in one of four possible states:

- **Pending Submission** — There have been no data submitted.
- **Submitted** — Data have been submitted, have passed an automatic check for errors and omissions, and are ready to be reviewed.
- **Reviewed** — The reviewer has checked the data for internal consistency and has returned the data to the user for clarification or correction.
- **Accepted** — The reviewer has checked the data for internal consistency and reviewer questions have been satisfactorily addressed by the project team. The data are released for analysis.

A project team may only submit data if the submission has "Pending Submission" or "Reviewed" status. The data may not be modified at any other time.

Only a reviewer may change the status of a data submission (Submitted, Reviewed, or Accepted).

Initial Setup

When you first receive your system credentials, you must log into the system and change your password.

1. Open your browser.
2. Go to https://projects.smartgrid.gov/. The login page will be displayed, as shown below.

Figure 1. Log in screen.

3. Enter your credentials and click "Login." The reviewer console will be displayed.

Figure 2. Reviewer console display.

4. Click the "Settings" link in the upper right corner.

Figure 3. User console display with "Settings" link indicated.

5. Enter your new password in the "New Password" and "Confirm New Password" fields and click "Submit."

Username	jlyndon_a
First Name	Jackie
Last Name	Lyndon
Email Address	jl_a@example.com
Role	ADMIN
New Password	
Confirm New Password	

Submit

Figure 4. "Settings" display with sample data indicated.

6. If the change was successful, you will see an "Updated" message.
7. If there was an error, a message will be displayed. Correct the error and click "Submit" again.

When you have completed the password change, your initial setup is completed.

Reviewing Metrics and Benefits Data

The diagram below shows how to review submitted metrics and benefits data.
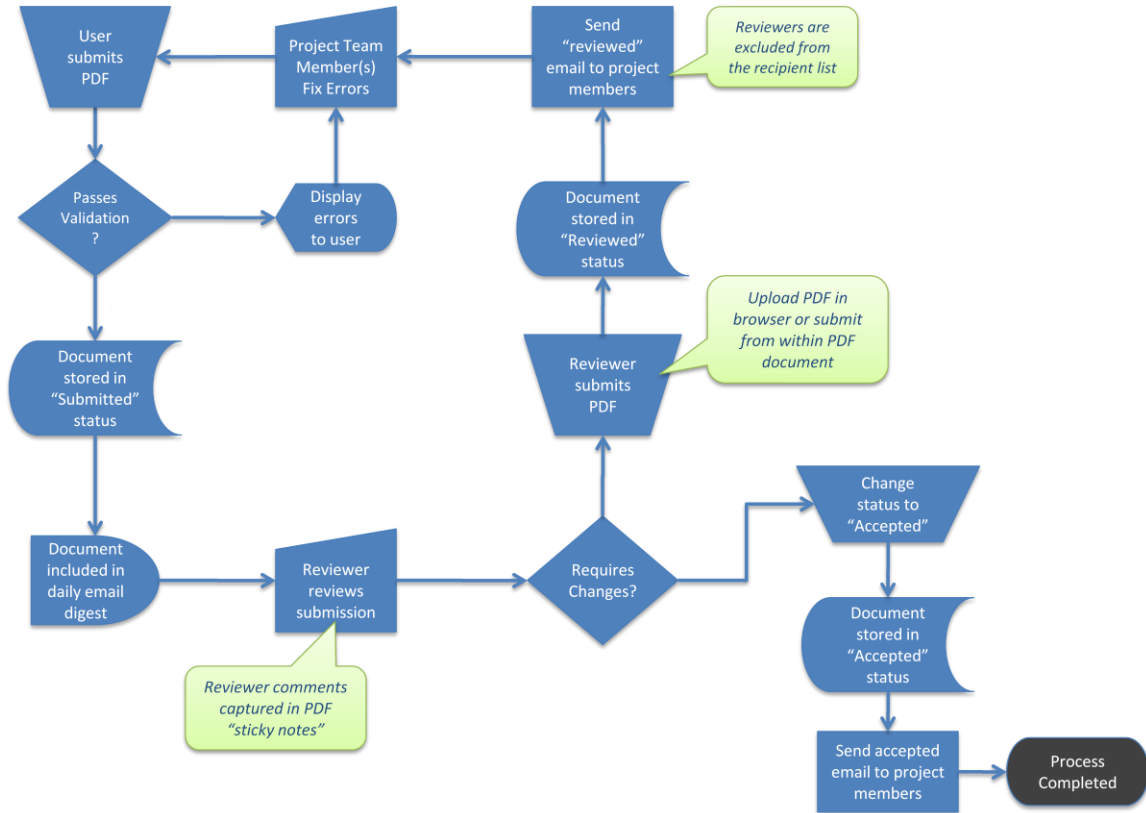
Figure 5: Data submission and review process flow.

Projects that are part of the Smart Grid Investment Grant program or the Smart Grid Demonstration Project program are required to have their data submitted to the Smart Grid Data Hub at the end of a specific period, which must contain the data specified by the Metrics and Benefits Reporting Plan (MBRP) for the project.

You will download a submission, verify that the data are reasonable and conform to the requirements of the MBRP, and then accept the submission or return it for further refinement. The process of validating the data is beyond the scope of this document. As a reviewer, you are a domain expert and should be able to identify data that are not consistent, are outside the expected range, or are not consistent with the MBRP requirements.

Accepting a submission will release the data into the reporting structure of the Data Hub. In addition, the submission will be "locked" and can not be updated unless the reviewer changes the status and returns it to the project team that submitted it.

To return a submission for further refinement, set the status to "Reviewed." When a submission is in "Reviewed" status, the project team may submit corrected data. If a previously accepted submission is later marked as "Reviewed," the data are removed from the reporting system.
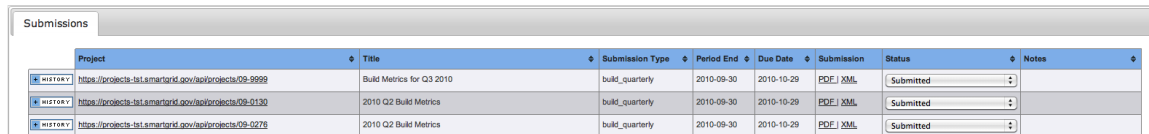
Reviewing Submission Data

Log In

1. Open your browser.
2. Go to https://projects.smartgrid.gov/.
3. The "Login" page will be displayed.
4. Enter your credentials and click "Login." The reviewer console will display the submissions in a table.

Figure 6: Reviewer console display and submissions table.

Locate the Submission to Review

Clicking on the column titles will sort the table by that column. To locate the submission to be reviewed, sort the table by "Status," locate the "Submitted" section, and then locate the submission by project ID and submission type.

Review the Data

There are two data formats available to you: PDF and XML. The PDF document will require Adobe Acrobat Reader (or a similar tool for your system). Adobe Acrobat Reader may be downloaded at http://get.adobe.com/reader/. The XML document is provided for those reviewers who are well versed in XML and who prefer to view the data using their favorite XML tool. This document does not recommend a specific XML tool, nor does it provide guidance on how to use any specific XML tool.

Reviewing the PDF Document

To review submission data as a PDF, take the following steps:

1. Locate the submission as noted in the "Locate the Submission to Review" section above.
2. Click on the corresponding PDF link in the "Submissions" column. The PDF will be downloaded to your computer.

Figure 7. Reviewer console display with PDF link indicated.

3. Open the PDF.
4. Review the data. Verify that the data seem correct and that all of the expected and required fields are completed. To facilitate review, you may print the downloaded PDF file and compare submitted data to other data (e.g., baseline values, project versus system values, and any previous submissions).
5. You can add notes directly to the PDF by right clicking near the area in the document where you want to make a note and select "Add Sticky Note" from the top of the pop-up menu. You cannot right-click in the editable fields. When finished typing, click the minimize icon in the top right corner (or press the Tab key and then the Enter key). Continue reviewing the document and add comments where needed.

6. When finished reviewing, if the document requires changes, then submit your comments using the "Submit" button at the bottom of the PDF document. If no changes are required, then you do not need to submit the PDF.
7. If the document appears to meet the requirements, accept the submission by:

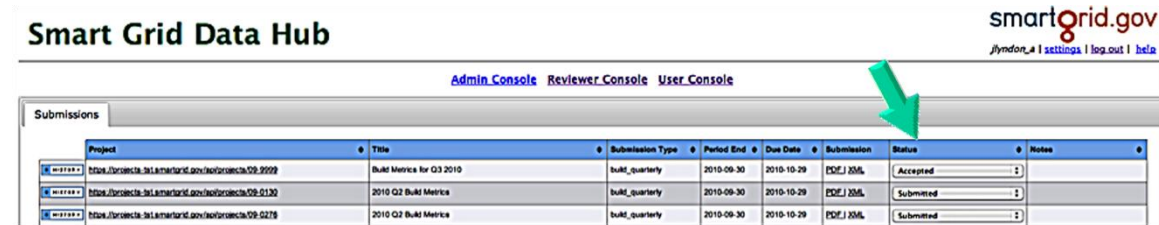a. Selecting the "Accepted" value in the corresponding status drop down list.

Figure 8. Reviewer console display with "Accepted" value selected from "Status" drop down list.

b. Entering any notes in the dialog box and clicking "Submit."

An approval notification email is sent to all project members to inform them that the submission has been approved and no further action is required.

8. If the submission does not appear to meet the requirements, return the submission to the project team by:
   a. Selecting the "Reviewed" value in the corresponding status drop down list.
   b. Entering notes and a reason for returning the submission in the dialog box and clicking "Submit."

   A notification email is sent to all project members to inform them that there are additional changes required.

At this point, the submission review is complete and you may now either log out by clicking the "Log Out" link on the reviewer console or continue to review other documents.

Figure 9. Reviewer console display with "Log Out" link indicated.

Reviewing Corrections

Occasionally, a reviewer will be returned to the project team for further clarification or correction. You may return a submission for any number of reasons related to data quality and reasonableness. Returned submissions have a state of "Reviewed." The project team will make corrections and resubmit the data. When this happens, the submission will again be in the "Submitted" state and available to the reviewer to re-review.

To locate previously returned submissions that have been corrected:

1. Log in as noted in the "Log In" section above.
2. Click on the "Status" column header. The submissions will be sorted by status.
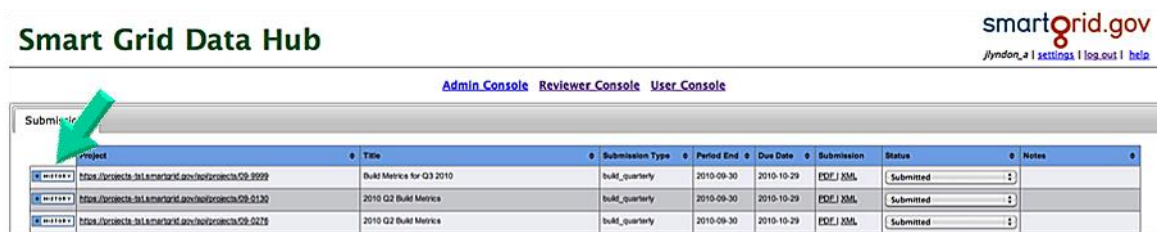

Figure 13. Reviewer console display with "Status" column indicated.

3. Locate the "Submitted" section.
4. Look for submissions that have a "History" link next to the "Status" drop down box.

Figure 14. Reviewer console display with "History" link indicated.

5. Locate the submission you wish to review.
6. Click on the history link. The displayed page will look much like the list of submissions, except that it will only display the history for the one submission.
7. The "Reviewer Notes" for the previous submission will specify the issues with that submission.
8. Review the data by:
   a. Reviewing the PDF data:
      i. Click on the PDF link under the "Submission" column. This will download the PDF to your system.
      ii. Open the PDF with the Adobe Acrobat Reader.
      iii. Complete the review as explained by step 3 of the "Reviewing the PDF Document" section above.
   b. Reviewing the XML data:
      i. Click on the XML link under the "Submission" column. This will download the XML document to your system.
      ii. Complete the review as explained by step 3 of the "Reviewing the XML Document" section above.