



PAR SITE USER MANUAL

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Contents

Revision History	2
1. Purpose	2
2. Acronyms/Abbreviations	2
3. Overview of UDC PAR System Life Cycle.....	3
4. PAR Life Cycle.....	4
5. Accessing PAR System and Login	5
6. PAR Site Functionalities	8
6.1 Create New PAR.....	8
6.2 Review Existing PARs & Respond.....	9
6.2.1 PAR Statuses.....	10
6.3 View PAR History.....	10
6.4 Search PARs.....	11
6.5 File Library.....	12
6.6 Export to Excel	13
6.7 Change Password.....	14

Revision History

Ver. No.	Date	Section	Page No	Amendments Made	Prepared By
0.1	Aug 22, 2020	All	All	Template Created	Mukul Kumar
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1. Purpose

This document serves to guide users through the various steps, functionalities, and methodologies of the **Problem Action Reporting (PAR)** system. The PAR system lends more efficient question and resolution tracking by allowing direct access and file sharing between UDC and their clients, prioritizing and delegating questions to the appropriate personnel, and managing and reporting issues for customers with increased accuracy.

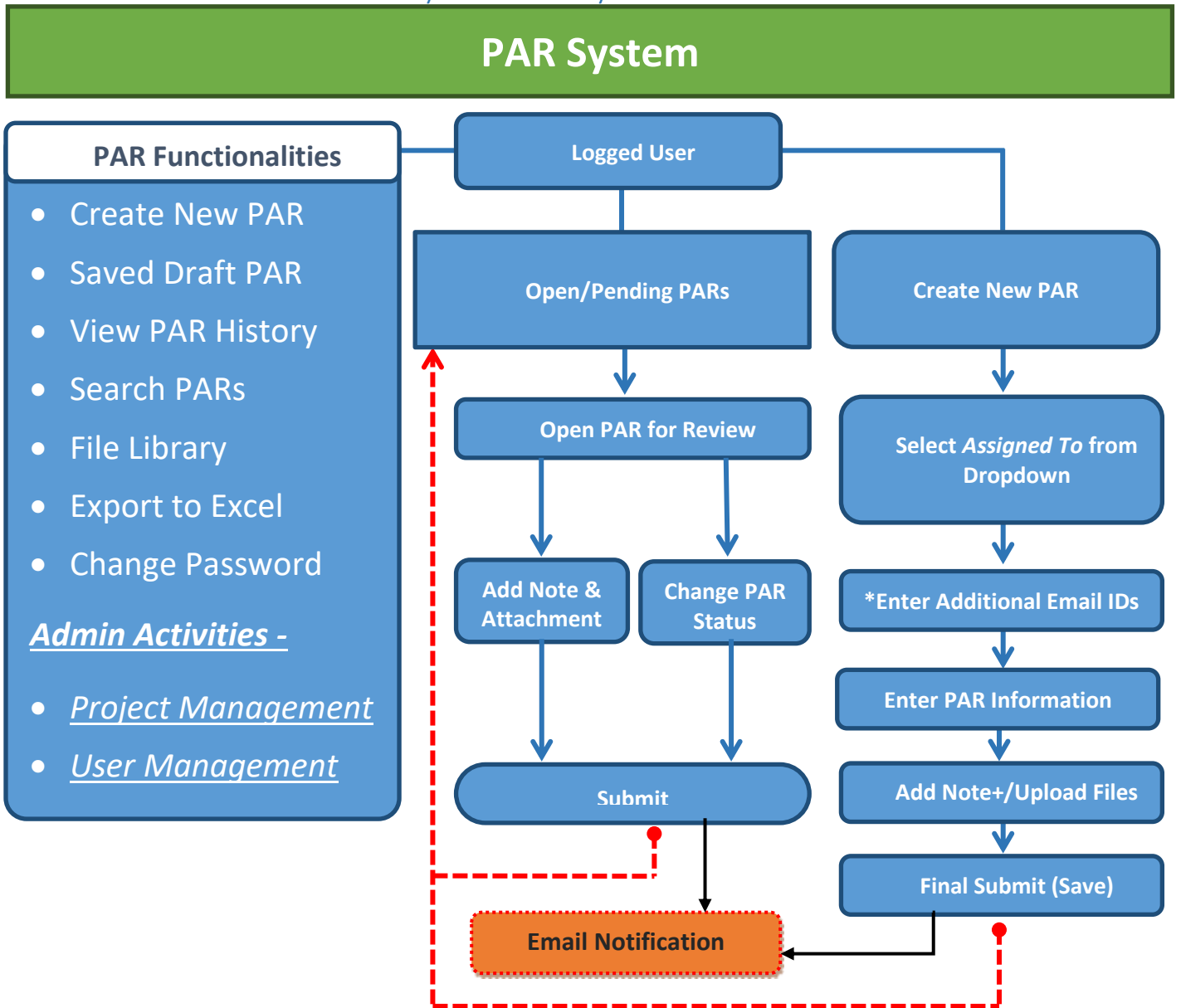
The PAR system interface is equipped with various add-on functionalities:

- Adding a new project or updating an existing project (*Project Management* page).
- Adding new users or granting various statuses to existing users (*User Management* page).
- Managing various PARs for internal/external customers on one website.
- Sending emails to stakeholders at the time of PAR creation, a change in PAR status, etc.

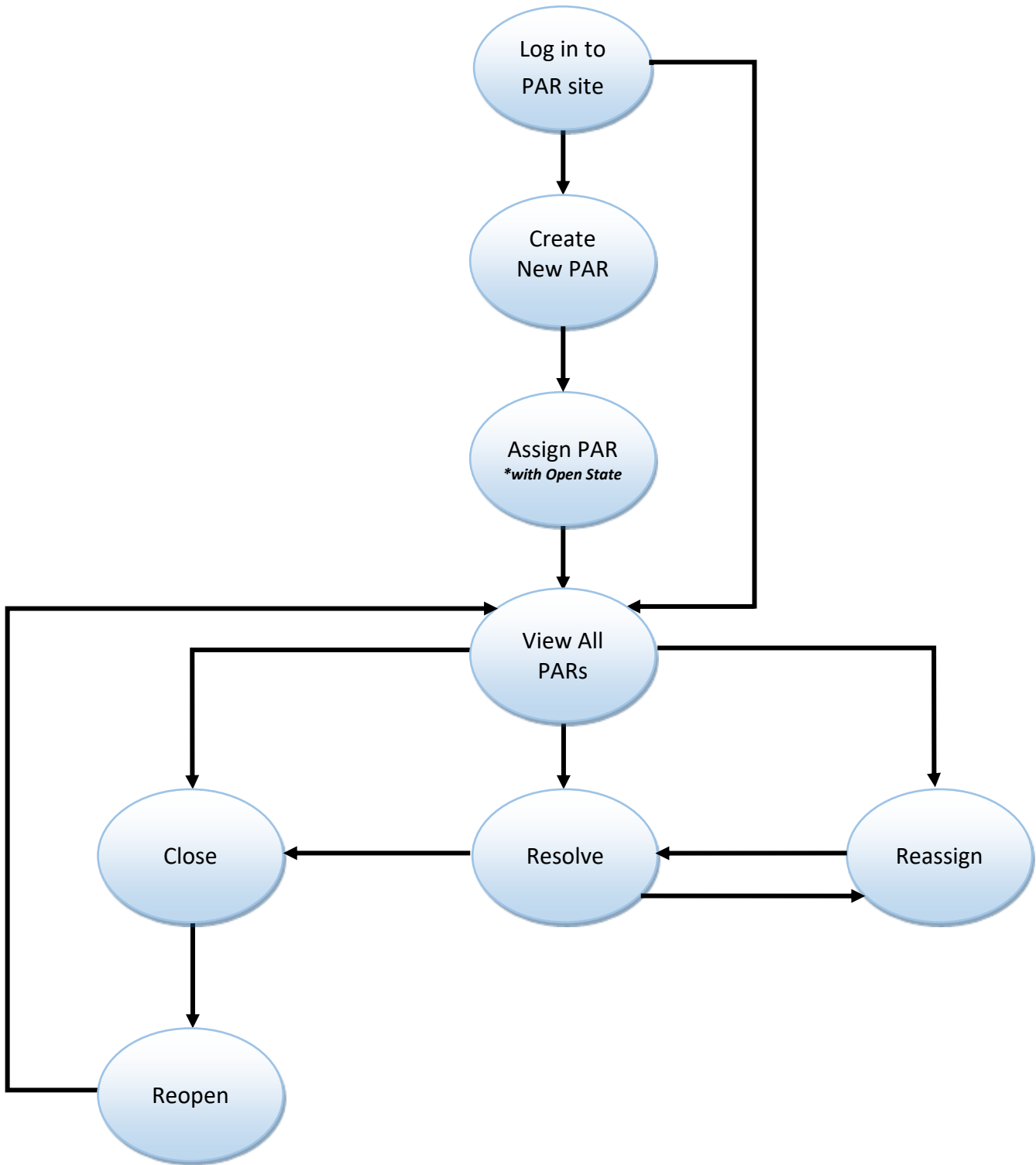
2. Acronyms/Abbreviations

No	Acronym / Abbreviation	Description
1.	PAR	Problem Action Reporting
2.		
3.		
4.		
5.		

3. Overview of UDC PAR System Life Cycle



4. PAR Life Cycle

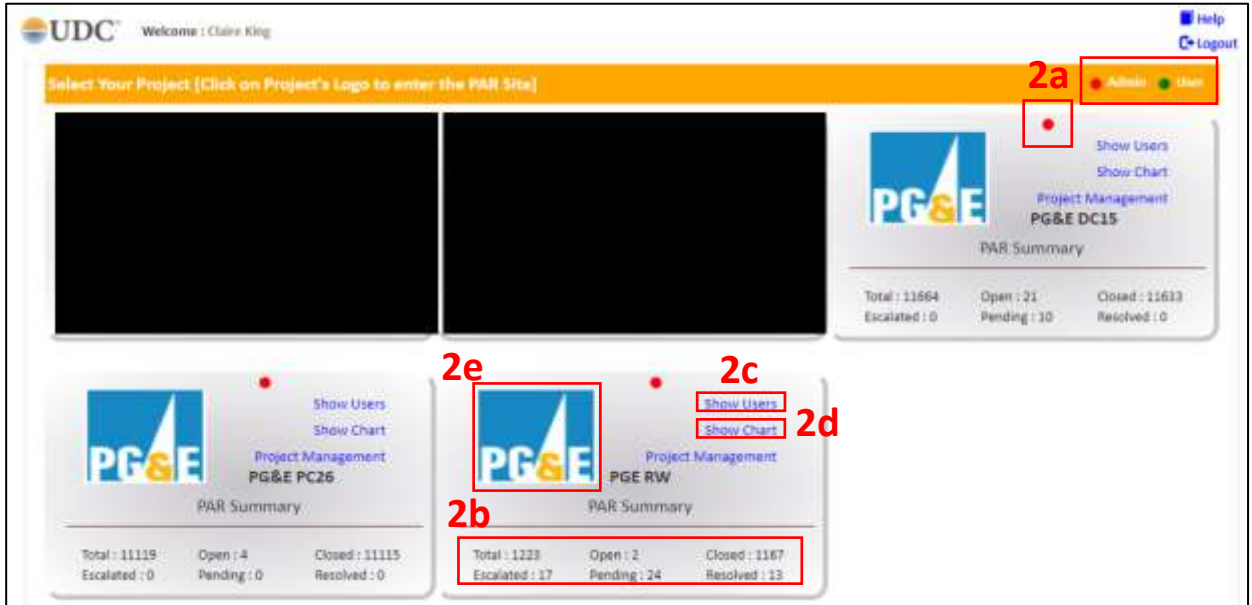


5. Accessing PAR System and Login

1. To log into the PAR site:
 - a. Open the [PAR site](#).
 - b. Enter login credentials.
 - c. Click “Login.”
 - i. If logging in for the first time, the user is required to create a new password.
 1. Enter and confirm new password.
 2. Click “OK.”
 3. The password has been updated. Return to step 1b.



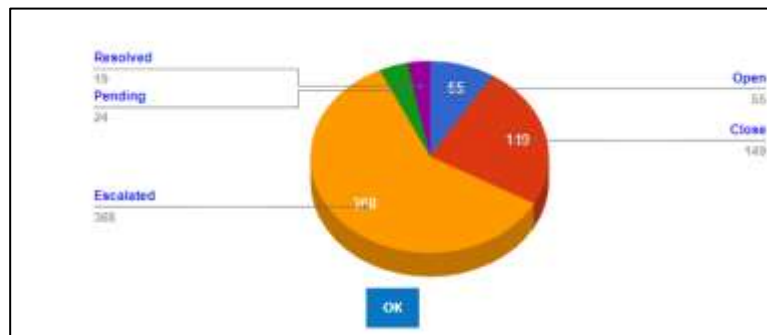
2. Once logged in, the user is directed to the project selection page, containing the list of projects assigned to the user.



- a. Each project card contains a **green** or **red** circle at the top middle.
 - i. The green circle indicates the user does not have admin rights for the given project.
 - ii. The red circle indicates the user has admin rights for the given project.
- b. A PAR summary is provided for each project.
- c. “Show Users” link lists all internal and external users for the given project.

User Name	Email ID	User Type
Melissa Stroik	mstroik@udcus.com	Internal
Cathy Brainard	CGBF@pge.com	External
Tom Henry	therry@usps.com	Internal
Rylee Barata	rbarata@udcus.com	Internal
Alexandra Perotti	aperotti@udcus.com	Internal
Johnathan Wlekinski	jwlekinsi@udcus.com	Internal

- d. “Show Chart” link graphically displays the PAR summary in a pie chart.



e. Click on the project logo to enter PAR site homepage for selected project.

The screenshot shows the PAR Site User Manual interface for PGE RW. The page is titled "Welcome : Claire King" and "PGE RW". The main content area displays a list of "Open PARs" with columns for PAR Subject, PAR #, Status, Initiated by, Assigned To, and Created Date. The list contains 10 entries, with the first entry being "PAR for TX Relocation Confirmation". The page also includes a "Menu" on the left, a "System Message" at the top, and a "Filter" box on the right. Red boxes and numbers 1-7 and 4a-4b highlight specific features: 1 points to the Menu, 2 to the Help button, 3 to the Logout button, 4 to the PAR list, 4a to the "Show 10 entries" dropdown, 4b to the "Showing 1 to 10 of 72 entries" text, 5 to the Filter box, 6 to the "Initiated/Assigned to me" button, and 7 to the column headers of the PAR list.

PAR Subject	PAR #	Status	Initiated by	Assigned To	Created Date
PAR for TX Relocation Confirmation	1287	Escalated	Keegan Miller	Jillian Landreville	Aug 06, 2021
PAR for Clarification	1286	Escalated	Samantha Ditgen	Jillian Landreville	Aug 06, 2021
Cutout Relocation	1285	Open	Cherna Padmanabhan	Kyle Bareta	Aug 06, 2021
Street Light Pole Connectivity	1284	Escalated	Saurab Verma	Kyle Bareta	Aug 06, 2021
RW Need More Clarification	1283	Escalated	Saurab Verma	Kyle Bareta	Aug 06, 2021
Switch Removal	1282	Escalated	Saurab Verma	Kyle Bareta	Aug 06, 2021
Capacitor bank not mapped	1281	Resolved	Saurab Verma	Saurab Verma	Aug 06, 2021
Delete Or Relocate Transformer	1280	Escalated	Saurab Verma	Jillian Landreville	Aug 06, 2021
Pole Removal with smart meter	1279	Escalated	Saurab Verma	Jillian Landreville	Aug 06, 2021
Missing Number for Switch	1278	Escalated	Nick Richards	Nick Richards	Aug 05, 2021

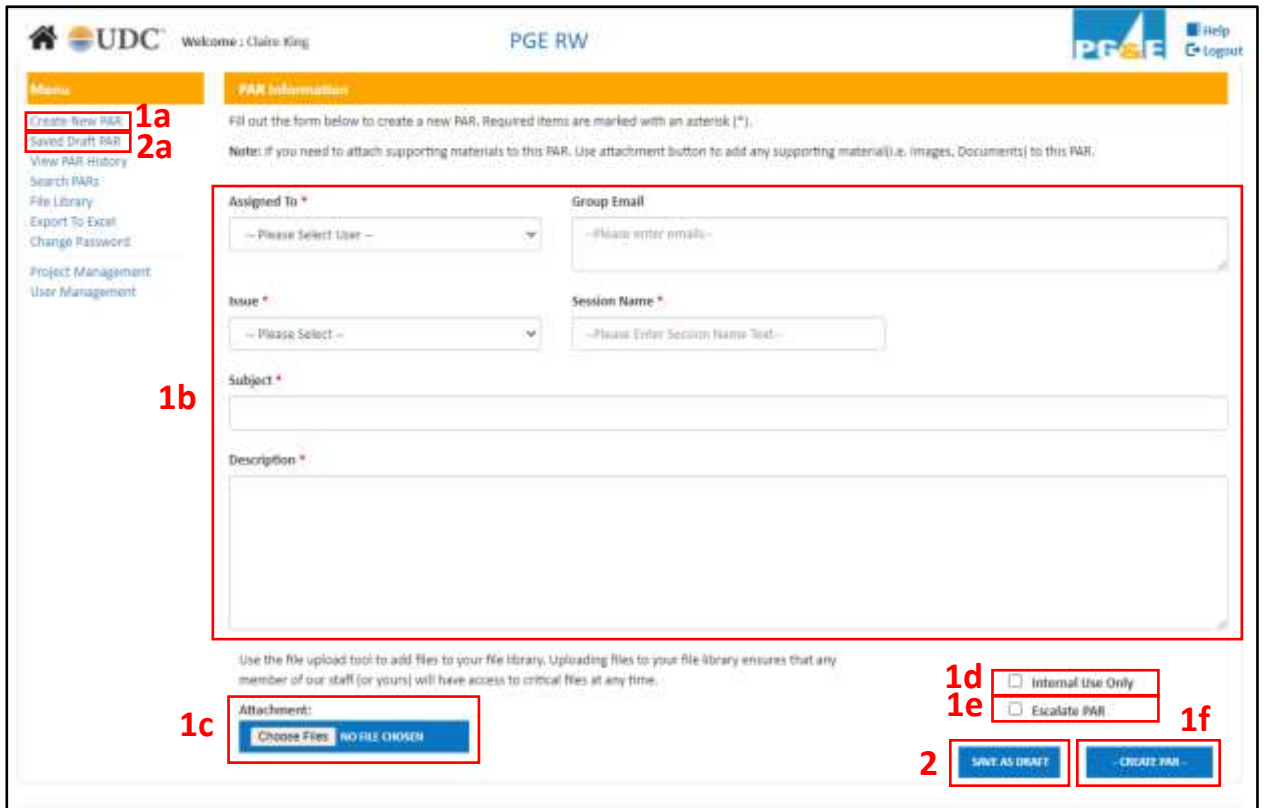
PAR Site Homepage:

1. "Menu" displays all key functionalities/actions that can be performed.
2. "Help" button redirects user to this user manual in a separate tab.
3. "Logout" button logs the user completely out of the PAR system.
4. PAR details for all open PARs are displayed in the center of the page.
 - a. By default, the site displays 10 PARs at once. The display number can be adjusted to "10," "20," or "All."
 - b. Navigate through PAR pages under the open PARs.
5. PARs can be filtered using the query box.
 - a. Search by subject, number, status, initiated by, assigned to, or create date.
6. "Initiated/Assigned to me" displays the number of PARs assigned to/initiated by user.
7. PARs can be sorted using the ascending/descending function in each column.

6. PAR Site Functionalities

6.1 Create New PAR

This feature allows the user to create a new PAR.



1. To create a new PAR:
 - a. Select “Create New PAR” from menu.
 - b. Fill out required information.
 - c. Click “Choose Files” to attach files as necessary to support PAR.
 - d. Check “Internal Use Only” box to make PAR invisible to external users.
 - e. Select “Escalate PAR” to send PAR to the client for an answer.
 - i. This should only be used by the PAR gatekeeper unless instructed to.
 - f. Click “Create PAR” once all information is filled out/attached.
2. Click “Save as Draft” to save PAR progress.
 - a. Select “Saved Draft PAR” from menu to view/edit all drafts created by user.

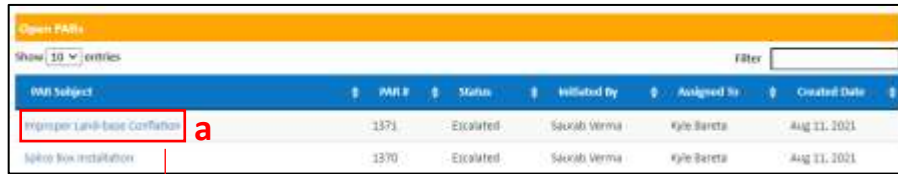
PAR Subject	PAR #	Status	Initiated By	Assigned To	Created Date
---	1	Draft	Claire King	Claire King	Aug 09, 2023

Showing 2 to 1 of 1 entries

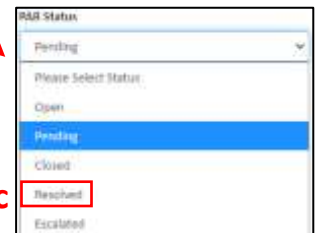
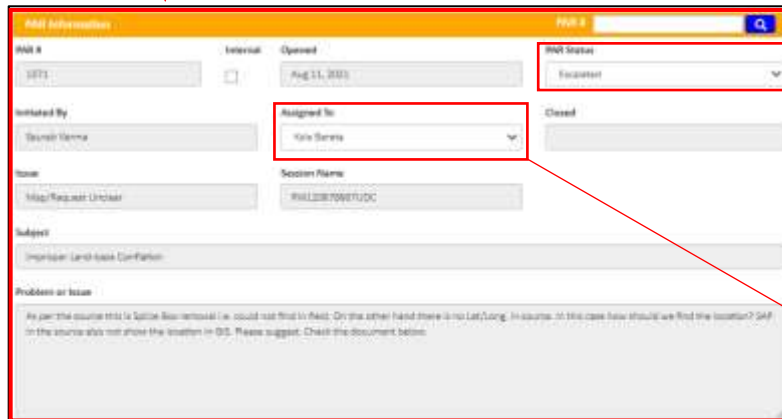
6.2 Review Existing PARs & Respond

To review/respond to an open PAR:

- a. Click on PAR subject from list of PARs on homepage to open PAR details.



Review PAR information



Forward/assign PAR to different user

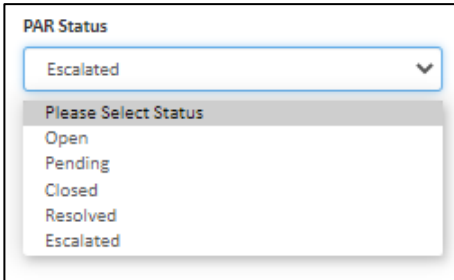


- b. Click "Update" to save changes.
 - i. "Cancel" will redirect the user back to the homepage without saving updates.
- c. Update PAR status to "Resolved" to complete PAR response.
- d. Click "Update" to save updated status.

*Note: User that PAR is assigned to and any entered group emails (See 6.1 Create New PAR 1b) will receive an email containing the PAR details and any attachments. Click the link in the email to open the PAR in the PAR site.



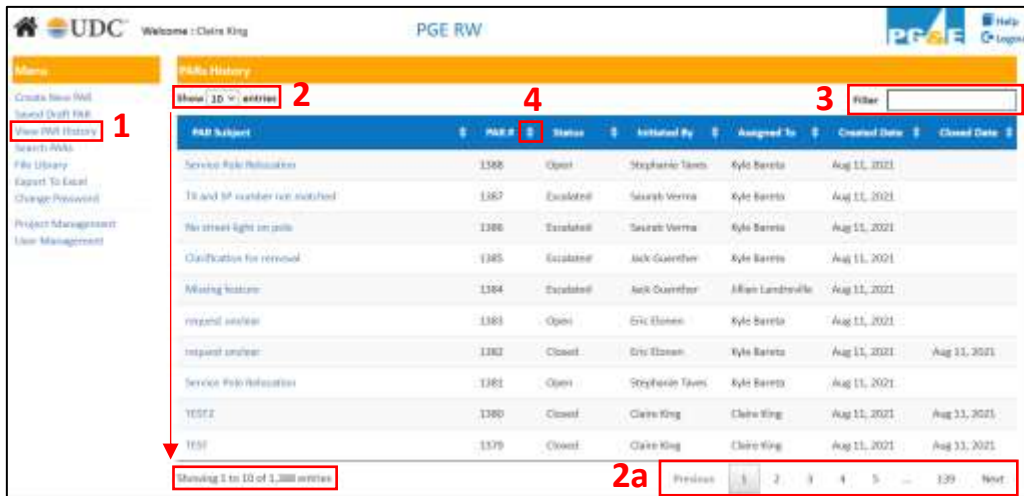
6.2.1 PAR Statuses



- **Open** – Default status for newly created PAR. PAR has not been claimed by a reviewer.
- **Pending** – PAR is waiting for review by PAR gatekeeper.
- **Closed** – PAR has been answered by reviewer/gatekeeper and verified by gatekeeper. Creation user has been notified of PAR response. This will remove the PAR from the “Open PARs” list on the homepage.
- **Resolved** – PAR has been answered by reviewer but is still awaiting approval from gatekeeper pending close and notification to creation user.
- **Escalated** – PAR has been sent to client for an answer.

6.3 View PAR History

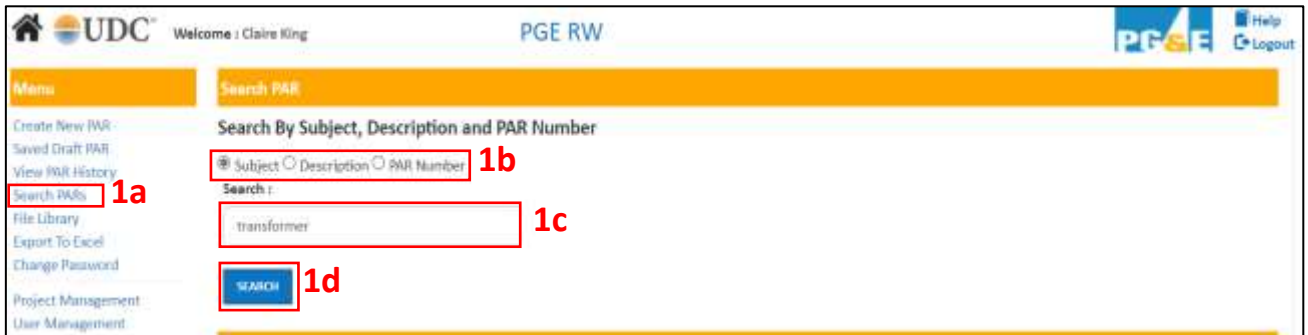
This feature allows the user to view all historical PARs.



1. To view PAR history, select “View PAR History” from menu.
2. By default, the site displays 10 PARs at once. The display number can be adjusted to “10,” “20,” “50,” or “All.”
 - a. Navigate through PAR pages.
3. PARs can be filtered using the query box.
 - a. Search by subject, number, status, initiated by, assigned to, or create date.
4. PARs can be sorted using the ascending/descending function in each column.

6.4 Search PARs

This feature allows the user to search through all PARs, regardless of status.



1. To search for PARs:
 - a. Select “Search PARs” from menu.
 - b. Select “Subject,” “Description,” or “PAR Number” to define the search category.
 - c. Enter keyword/number in search box based on the selected category.
 - d. Click “Search.”
2. All open and closed PARs containing the search keyword/number will populate below the “Search” button.

PAR Subject	PAR #	Status	Initiated By	Assigned To	Created Date
Denise CR Resource Transformer	1127	Approved	Sarah Verma	Sarah Verma	Aug 11, 2021
Showing 2 of 1 of 1 entries					
Closed PARs					
Denise CR Resource Transformer	1183	Closed	Sarah Verma	Sarah Verma	Aug 16, 2021
Denise CR Resource Transformer	1128	Closed	Sarah Verma	Sarah Verma	Aug 04, 2021
Denise CR Resource Transformer	1145	Closed	Sarah Verma	Sarah Verma	Aug 04, 2021
Denise CR Resource Transformer	1121	Closed	Sarah Verma	Sarah Verma	Aug 03, 2021
Denise CR Resource Transformer	1184	Closed	Sarah Verma	Sarah Verma	Aug 30, 2021
Denise CR Resource Transformer	1155	Closed	Sarah Verma	Sarah Verma	Aug 30, 2021
Denise CR Resource Transformer	1122	Closed	Sarah Verma	Sarah Verma	Aug 28, 2021
Transformer relocation for utility work	1094	Closed	Austin Jay	Austin Jay	Jul 26, 2021
Transformer relocation for utility work	1092	Closed	Stephane Tamin	Stephane Tamin	Jul 26, 2021
Transformer Relocation Relocation	1076	Closed	Tom Emery	Tom Emery	Jul 22, 2021
Showing 9 of 10 of 10 entries					

6.5 File Library

This feature allows the user to view/download attachments uploaded in PARs.

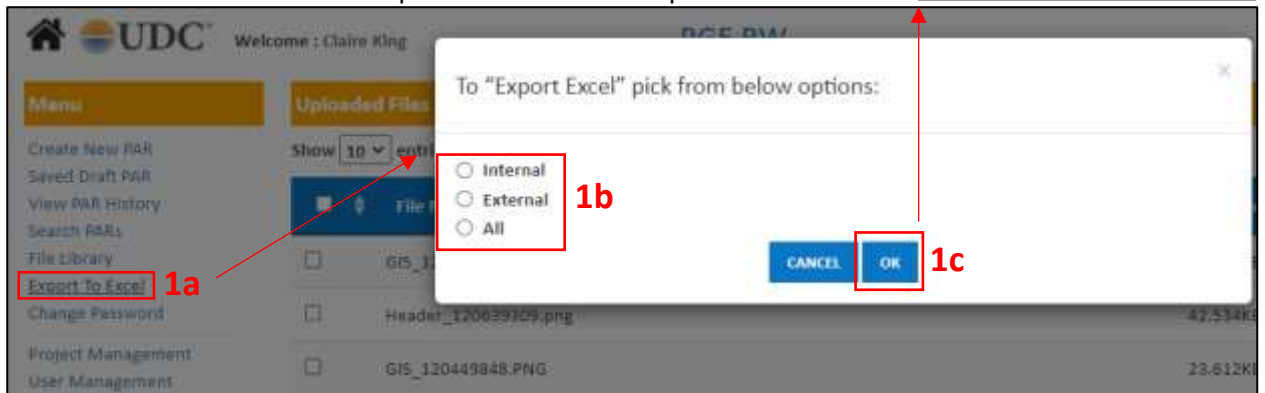
The screenshot shows the UDC File Library interface. The main content area is titled 'Uploaded Files' and contains a table of files. The table has columns for 'File Name', 'File Size', 'PAR #', and 'Uploaded Date'. The first row of the table is highlighted. A 'Downloads' window is open in the top right corner, showing a file named 'PARHeader.PNG' with an 'Open File' button. The interface includes a left-hand menu with 'File Library' selected, a top navigation bar with 'UDC' and 'PGE RW', and a bottom navigation bar with 'Showing 1 to 10 of 2,490 entries' and 'Download' buttons.

File Name	File Size	PAR #	Uploaded Date
PARHeader.PNG	17.644KB	1392	Aug 11, 2021
PARGIS.PNG	22.618KB	1392	Aug 11, 2021
1391.zip	386.912KB	1391	Aug 11, 2021
0992_Comments.PNG	4.29KB	1290	Aug 11, 2021
0992_GIS.PNG	83.401KB	1290	Aug 11, 2021
0992_images.PNG	352.647KB	1290	Aug 11, 2021
120610597.JPG	58.243KB	1389	Aug 11, 2021
RW source.PNG	22.593KB	1388	Aug 11, 2021
GIS_120675873.png	306.348KB	1387	Aug 11, 2021
MAP_120675873.png	839.408KB	1387	Aug 11, 2021

1. To access the file library, select “File Library” from menu.
2. Files can be filtered using the query box.
 - a. Search by file name, file size, PAR number, or upload date.
3. Click on “PAR #” to open a particular PAR.
4. By default, the site displays 10 PARs at once. The display number can be adjusted to “10,” “20,” “50,” or “All.”
 - a. Navigate through PAR pages.
5. PARs can be sorted using the ascending/descending function in each column.
6. To download attachment(s):
 - a. Select either a single or multiple checkbox(es) next to the desired file name(s).
 - b. Click “Download.”
 - c. The download window will pop up in the upper right corner of the screen. Click “Open File” to view attachment(s).

6.6 Export to Excel

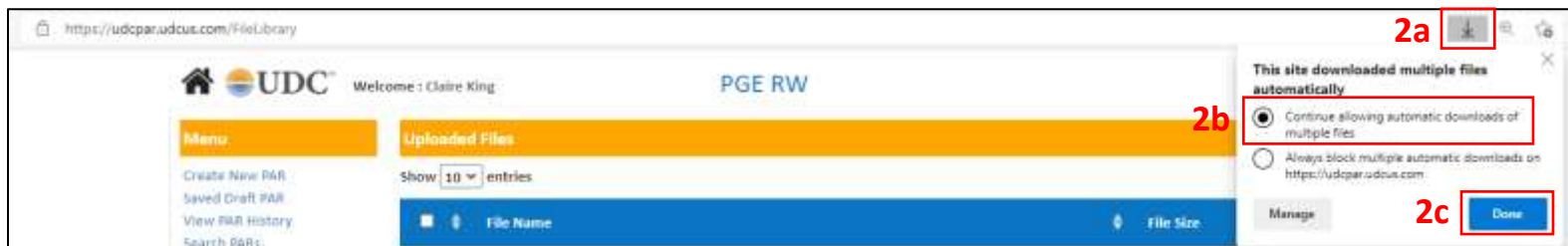
This feature allows the user to export PARs to an Excel spreadsheet.



1. To export PARs:

- a. Select "Export to Excel" from menu.
- b. An export popup will appear. Select either "Internal," "External," or "All."
 - i. Only one PAR category can be exported at one time.
 - ii. External users will be unable to export PARs marked "Internal."
- c. Click "OK."
- d. The download window will pop up in the upper right corner of the screen. Click "Open File."
 - i. Export file will contain all PAR details, comments/descriptions, and timestamps for the dates the PAR was opened and closed and when comments were uploaded.

PAR#	Status	OpenDate	CloseDate	InitiatorID	Assignee	PARSubject	PARDescription	Comments
1	Closed	11/6/2020 17:56	11/10/2020 8:18:36 AM	Melissa Strook	Nate Holland	Test subject	Test Descr	All/6/2020 6:01:00 PM [Nate Holland]- Test Comment(1) 1/6/2020
2	Closed	11/9/2020 8:35	11/10/2020 8:18:44 AM	Nick Richards	Nate Holland	TEST	TEST	
3	Closed	11/9/2020 8:37	11/12/2020 3:39:00 PM	Karina Vargas	Nate Holland	TEST	TESTING TESTING 1, 2	
4	Closed	11/12/2020 11:42	11/18/2020 4:21:34 PM	Nick Richards	Nate Holland	Structure that does not exist in field has device	This work order is to remove a structure (SAPID #11/17/2020 9:22:00 AM [Nate Holland]- Move the smart marker re	
5	Closed	11/12/2020 15:32	11/18/2020 9:59:41 AM	Melissa Strook	Nate Holland	Pole appears in Google Earth	RW 119997223 states Structure does not exist in #11/17/2020 9:37:00 AM [Nate Holland]- Pole 103088893 is visible	
6	Closed	11/15/2020 13:48	11/23/2020 3:17:39 PM	Nick Richards	Cassy Brainard	Pole with attached proposed install conductor, anchor, and device	This pole has a Proposed install conductor attach#11/19/2020 12:34:00 PM [Cassy Brainard]- CQBF - in progress#11	



2. If unable to export the files, update the browser's setting to download multiple files at once.

- a. Click download icon in URL bar.
- b. Select "Continue allowing automatic downloads of multiple files."
- c. Click "Done."

6.7 Change Password

This feature allows the user to update an existing password.

1. To update password:
 - a. Select “Change Password” from menu.
 - b. Enter current password.
 - c. Enter and confirm new password.
 - i. Password must conform to the given guidelines.
 - d. Click “Submit.”