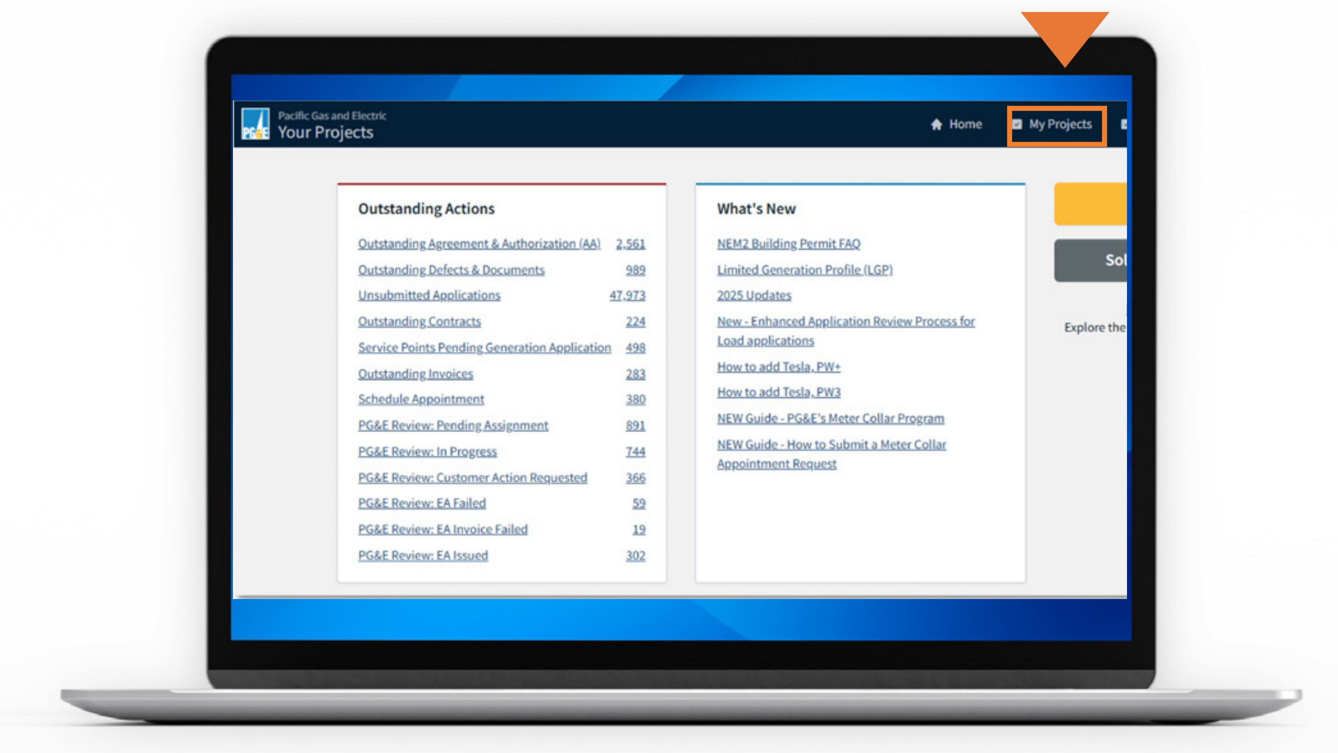
YOUR PROJECTS

My projects list and customized views

In the Your Projects portal dashboard, you can view a list of all applications and active projects. This guide provides instruction on how you can create and customize preset project list views. This process can be used with any project type.

Step 1 Log in to YourProjects.pge.com

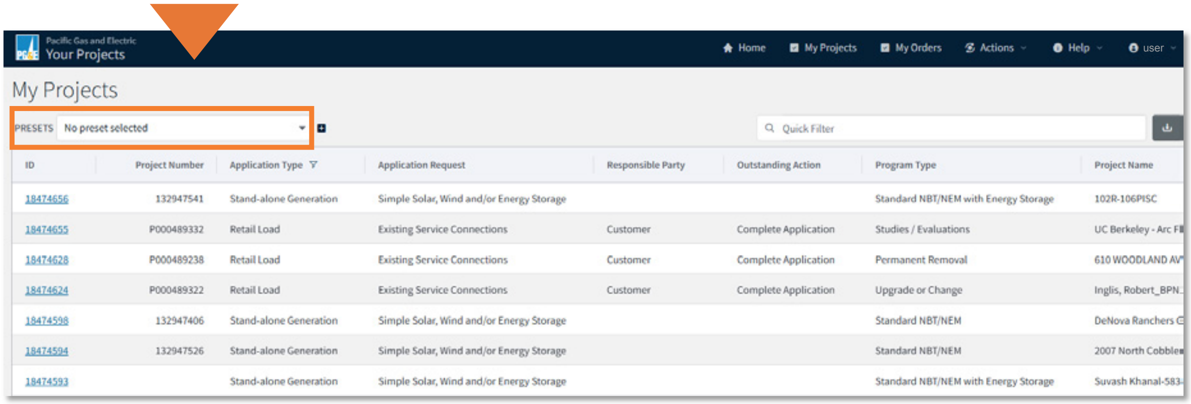
In your **dashboard view**, click on **My Projects** in the black banner at the top of the screen.



Step 2 View your project list

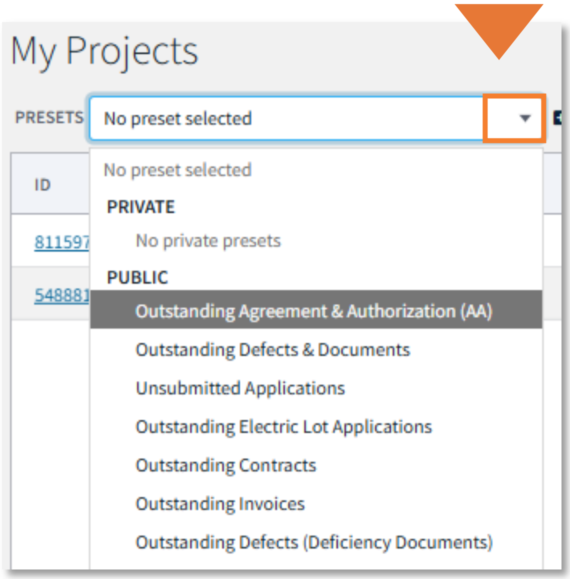
A list of all your applications and active projects will display with a **PRESETS** field in the top left corner.

The view will default to "No preset selected".



Step 3 Click the drop-down arrow in PRESETS

You may see the following default presets.



Outstanding Agreement & Authorization (AA)	Applications pending a signed Agreement and Authorization from the Customer of Record
Outstanding Defects & Documents	Applications with outstanding items such as missing or incorrect documents
Unsubmitted Applications	Applications started but not submitted
Outstanding Electric Lot Applications	Projects with Service Points set up that are pending a generation application
Outstanding Contracts	Contracts sent to customer but not yet executed
Outstanding Invoices	Invoices sent to customer but not yet paid
PG&E Review: Customer Action Required	Applications that require customer action to proceed

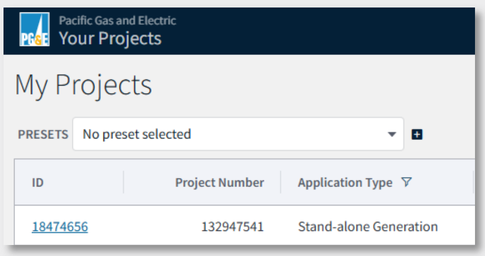
Step 4 Create a new preset

To **create a new preset**, there are two options:

A

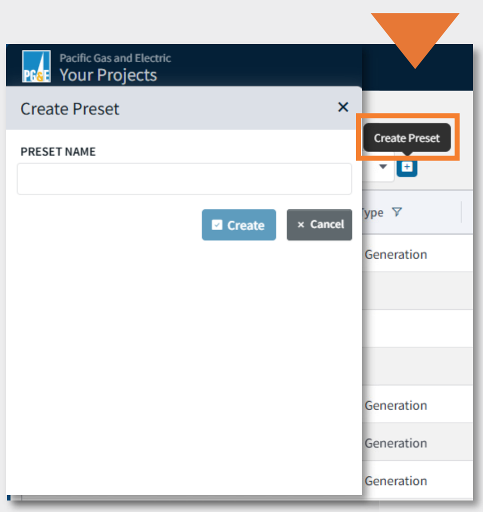
Create a Brand-New Preset

Start from "No preset selected" in the **PRESETS** field.



Make desired changes to the preset (see next pages for guidance on customizing a preset).

Click **+** and enter a name for your new preset in the open field. Then click **Create**.

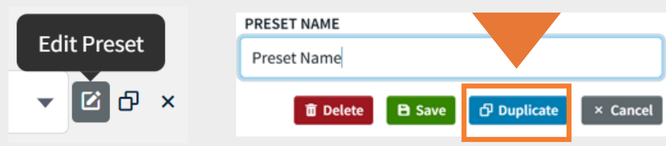


B

Duplicate an Existing Preset

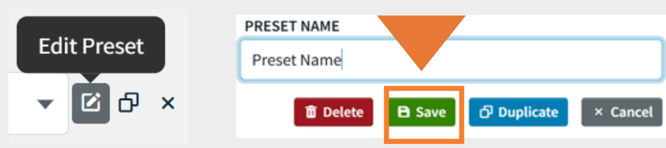
Select the preset you want to duplicate from the **PRESETS** drop down.

Click **Edit Preset** and click **Duplicate**. Give the preset a new name.



Make desired changes to the preset (see next pages for guidance on customizing a preset).

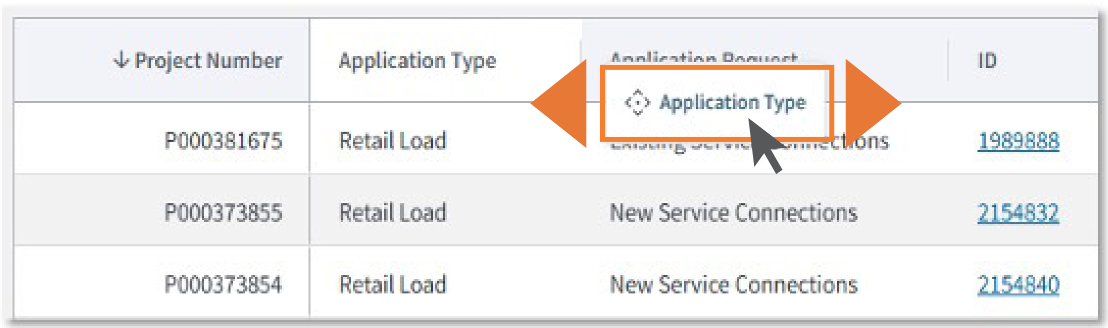
Click **Edit Preset** again and click **Save**.



Customize a preset

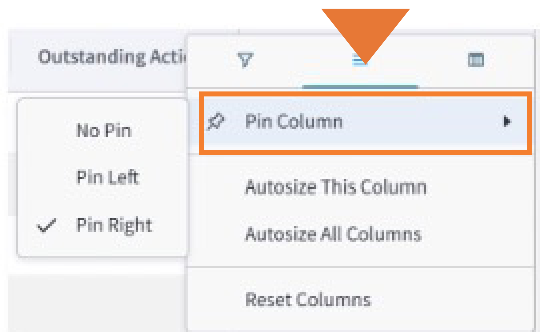
Change Column Order

To change the order of columns, click and hold cursor in the header row of the column you want to move and drag right or left to the desired position.

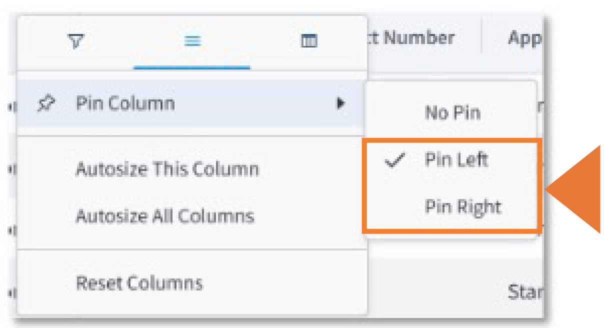


Pin Columns to Left or Right

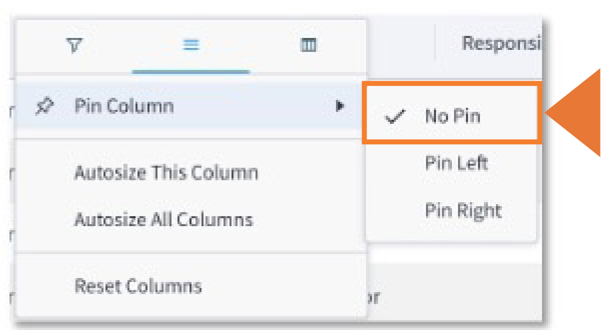
To **pin (or freeze) a column** to the left or right of the screen, click on the burger symbol in the header of the column you want to pin and select:
Pin Right or **Pin Left**



Once you have a single column pinned, you can drag other columns into that pinned area (see Change Column Order above).



To **unpin a pinned column**, click on the burger symbol in the header of the column you want to pin and select **No Pin**.



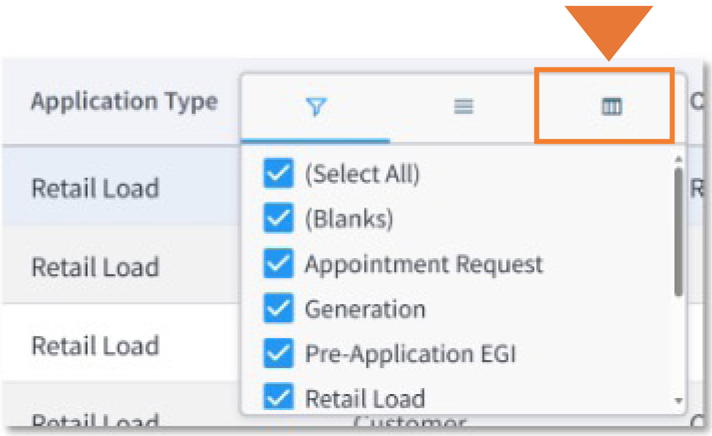
Customize a preset

Sort Column Data

To change the alphabetical or numerical order of the contents of a column, click on the **Header Title** of the column you want to sort, and it will change to the opposite sort order.

Add or Remove Columns

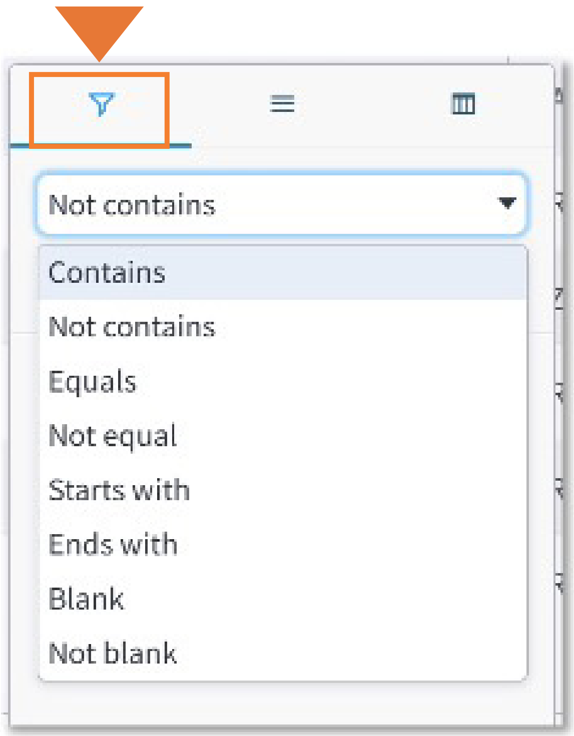
To **add or remove a column**, click on the burger symbol in the header of the column then click on the table symbol and select or unselect column titles accordingly.



Filter Data in a Column

To further customize the data in a column, you can **add filters**, such as Contains, Not Contains, Equals, Not Equal, Starts With, Ends With, Blank and Not Blank.

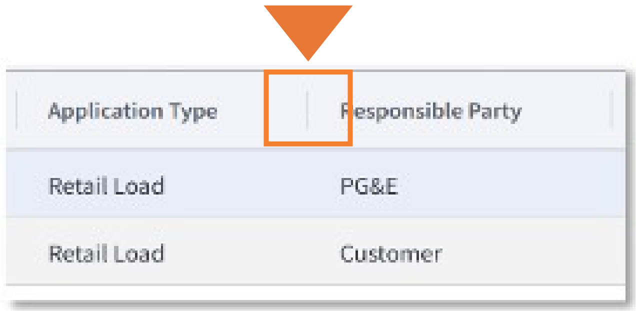
Click on the burger symbol in the header of the column then click on the funnel symbol to see these options.



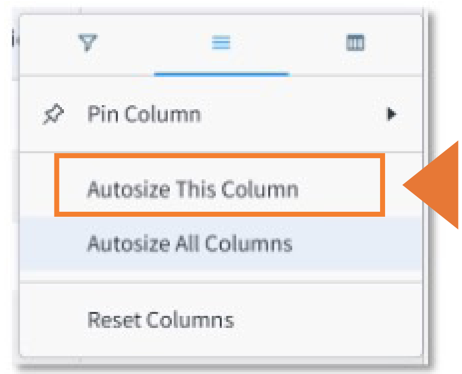
Customize a preset

Change Size or Autosize Columns

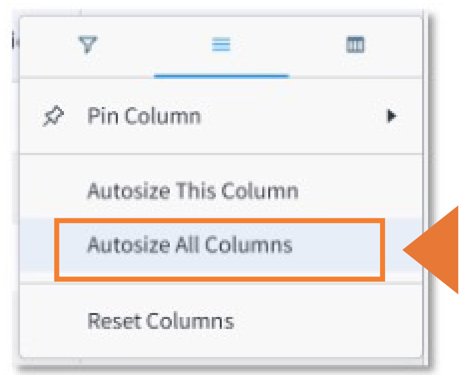
If you would like to **expand a column,** hover over the grey line to the right of the column **Header Title** until the double arrow appears, click, hold and drag to the right to the desired column width.



If you would like to **autosize a single column** to its natural width, click on the burger symbol in the header of the column then click **Autosize This Column**.

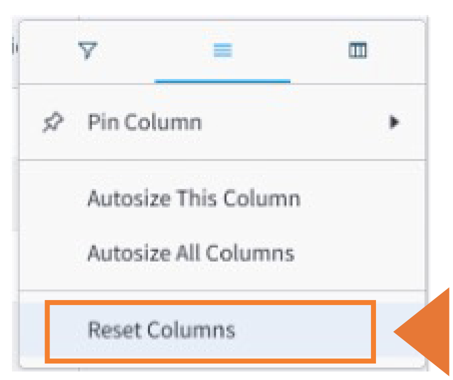


If you would like to **autosize all columns** in your preset, click on the burger symbol in the header of the column then click **Autosize All Columns**.



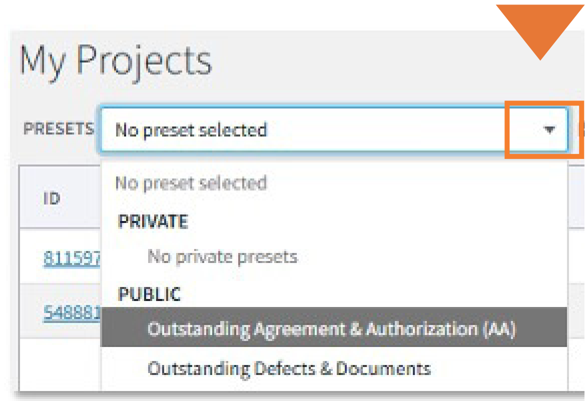
Reset to Default View ("No preset selected")

To reset the page to the default column view, click on the burger symbol in any column header then click **Reset Columns**.



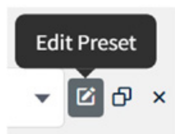
Step 6 Edit an existing preset

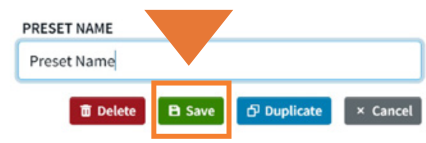
To **edit an existing preset,** select the preset you want to modify from the **PRESETS** drop down.



Make desired changes to the preset (see previous pages for guidance on customizing a preset).

Click **Edit Preset** again and click **Save**.





Step 7 Export list data

If you would like to **export the content of a project list**, click on the gray box with the download icon and select **.xls** or **.csv** and click **Export**.