Reviewing the Orange Button Taxonomy

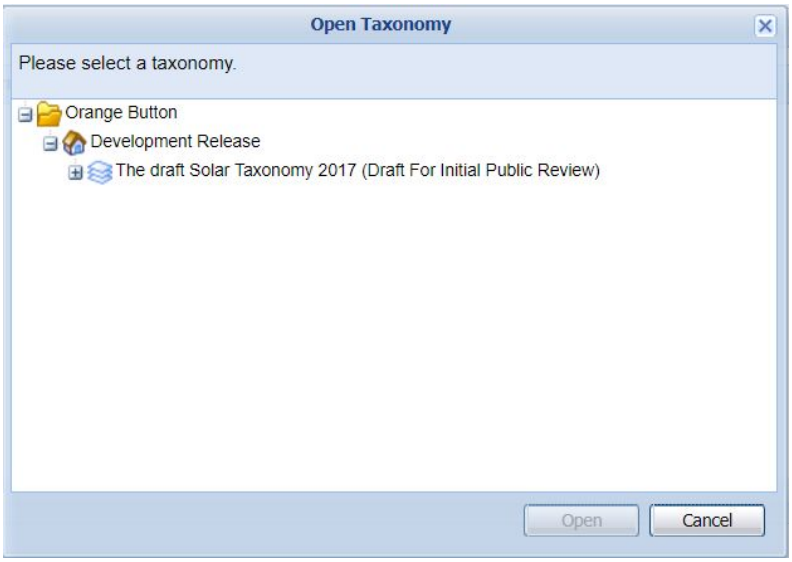
Sunspec Alliance and XBRL US have developed Orange Button data standards designed to cover the solar life cycle including use cases for project finance, portfolio finance, construction finance, insurance and surety, and securitization. This document provides step by step instructions on how to review the Taxonomy.

During your review, if you identify definitions or labels that merit revision, or see areas where additional concepts may be needed, you can submit a comment through the Yeti review tool. We continue to need input from industry stakeholders to help us refine and improve the taxonomy. This Guide will walk you through the steps to review and comment on the Taxonomy.

Register

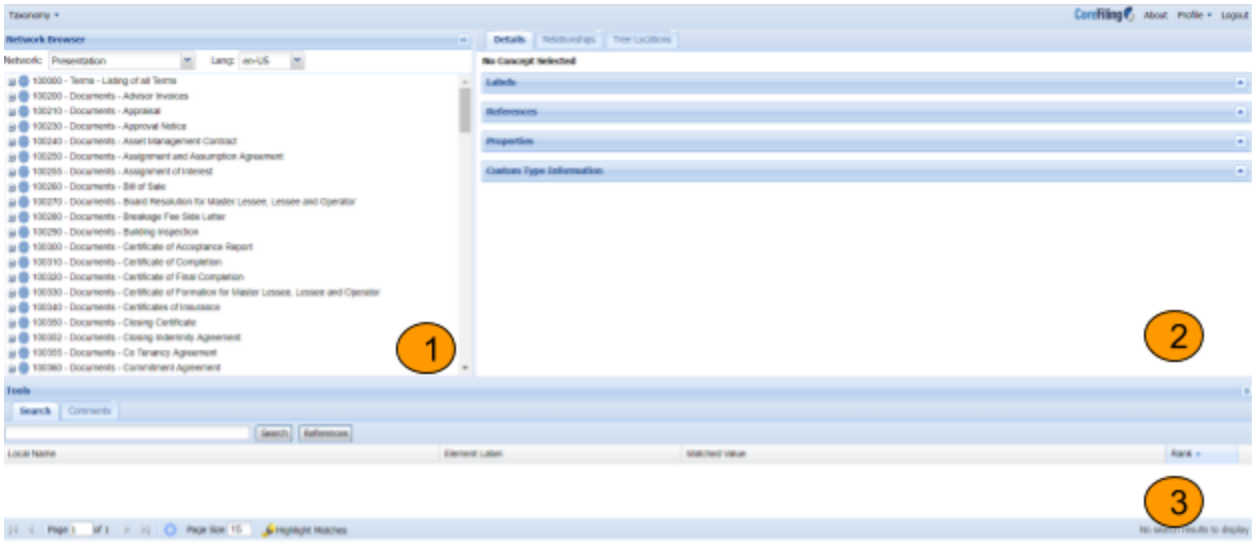
To review the Taxonomy, please follow these steps.

1. Accept the terms and conditions for the Orange Button review which confirms that any comments you contribute are freely disclosed with no restrictions.
2. Create a registration in CoreFiling's Yeti application (https://yeti1.corefiling.com/yeti) which will allow you to view the taxonomy and to submit comments.
3. Once you're logged in, select the draft Solar Taxonomy 2017 as shown in the screen capture below.



Get started

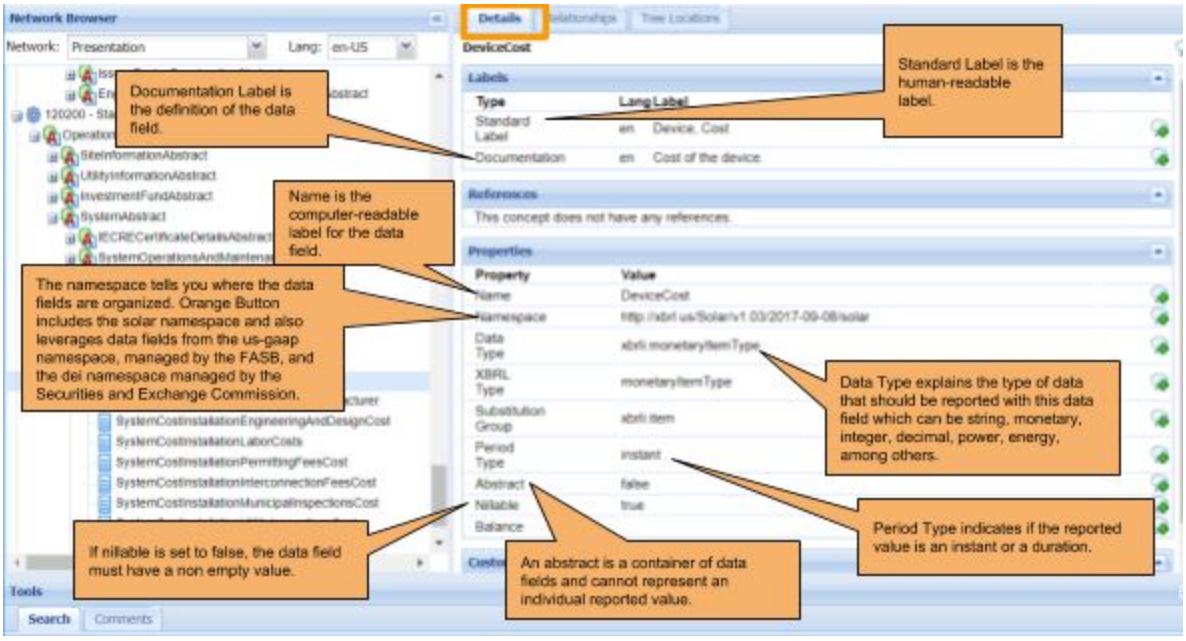
The Yeti viewer has three panes as shown in the screenshot below. Pane 1 depicts a listing of the individual groups within the Orange Button Taxonomy. Any group can be opened by clicking on the + sign to the left of the group name. Pane 2 is where you will be able to see the attributes of an individual data field. We'll cover this section in more detail in "Review". Pane 3 is where you can search on keywords to find a data field or section of interest. You can also view comments that may have been made by another viewer related to one of the data fields in section 3.



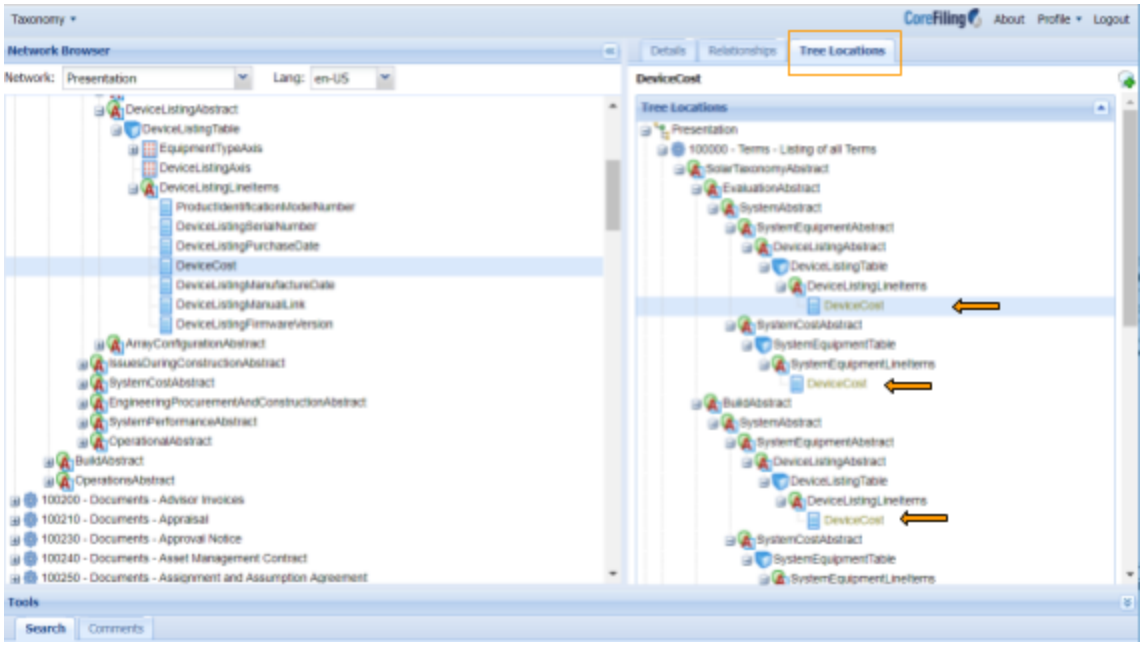
Review

Once you've opened the taxonomy to view the data fields, click on a group to open up the list of data fields in the group, and view the hierarchy of terms below. Click the - (minus) sign to close the tree.

In the Details tab from the upper right-hand pane (which is highlighted), select on an individual item to see all the corresponding metadata associated with that datafield. The orange callouts in the screenshot below explain the meaning of the metadata.

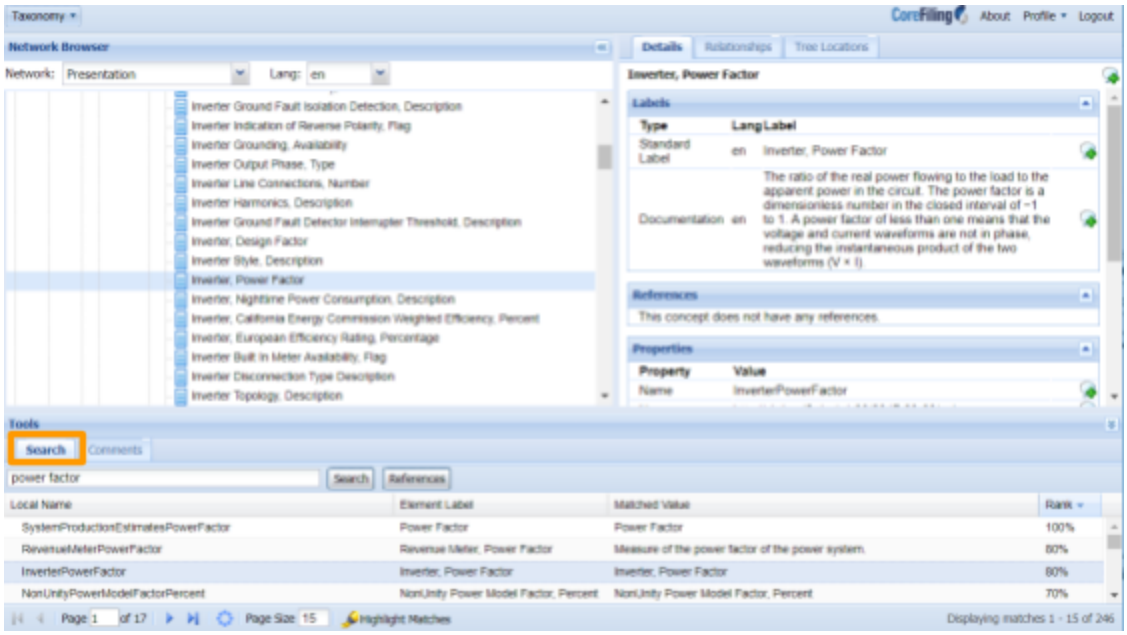


Move to the Tree Locations tab on the upper right-hand pane to see where that data field resides in different locations throughout the taxonomy. A single data field may appear multiple times to make it easier for users to find the data field they need.


Taxonomy
CoreFiling
About
Profile
Logout
Network Browser
Network: Presentation
Lang: en-US
Details
Relationships
Tree Locations
DeviceCost
Tree Locations
Presentation
100000 - Terms - Listing of all Terms
SolarTaxonomyAbstract
EvaluationAbstract
SystemAbstract
SystemEquipmentAbstract
DeviceListingAbstract
DeviceListingTable
DeviceListingLineItems
DeviceCost
SystemCostAbstract
SystemEquipmentTable
SystemEquipmentLineItems
BuildAbstract
OperationsAbstract
100200 - Documents - Advisor Invoices
100210 - Documents - Appraisal
100230 - Documents - Approval Notice
100240 - Documents - Asset Management Contract
100250 - Documents - Assignment and Assumption Agreement
Tools
Search
Comments

Search

Can't find something you think should be in the taxonomy? Use the bottom panel to search on keywords. This search allows you to search through the full Orange Button Taxonomy and also through the US GAAP Taxonomy since Orange Button has "borrowed" many US GAAP financial terms. When you click on the data field of interest, it will be highlighted in the upper left-hand panel and its metadata will appear on the right.



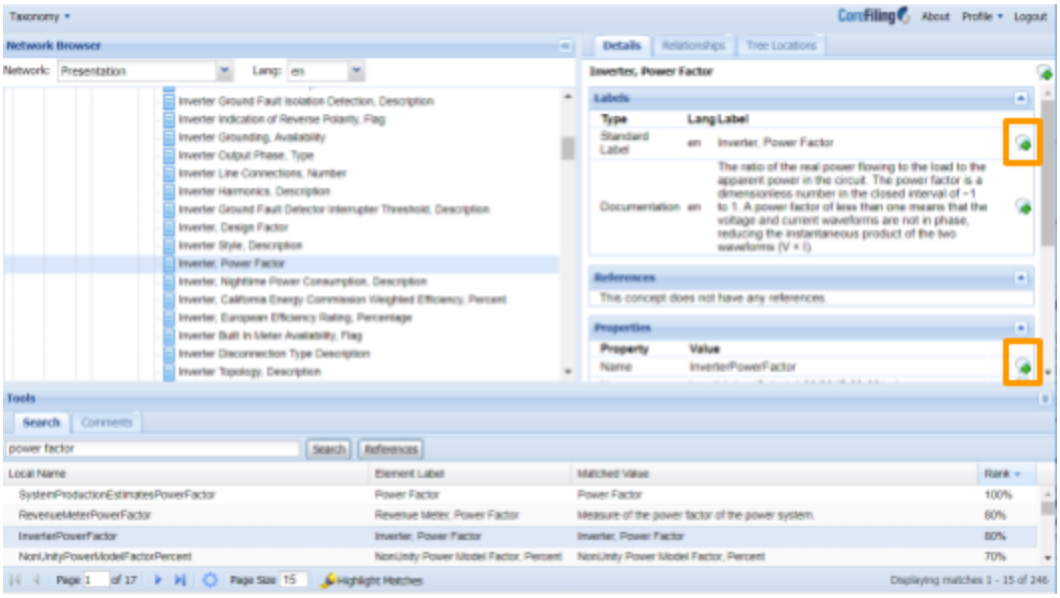
Consider

While you're perusing Orange Button, take the time to think about the following questions and how solar data standards may affect your business and workflow:

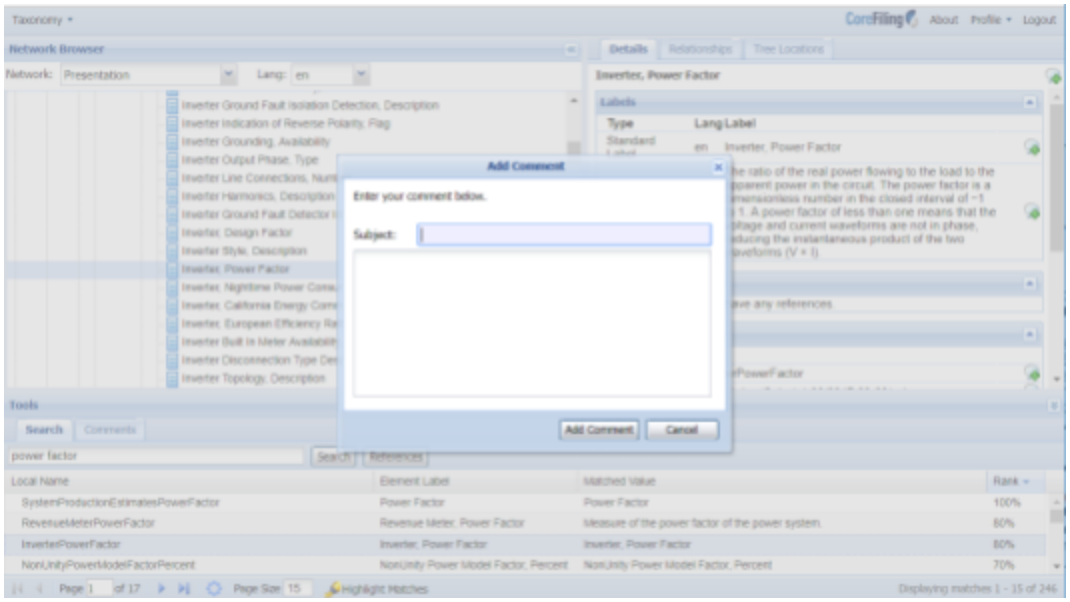
- Are definitions correct?
- Are labels accurate?
- Are data fields missing that are needed for use cases?
- Are there duplicates?
- Is it easy to find what you need? (do we need other ways to enter or group the taxonomy?)

Comment

Yeti allows viewers to make suggestions and observations on all aspects of a data field and on the taxonomy in general. Just click on one of the green + signs as shown in the screenshot below.



That will bring up a pop-up box where you can input your comments. Your comment will be viewable by all other reviewers and they will have an opportunity to respond to your comment. All comments will be reviewed and considered, and may find their way into the next release of the Orange Button taxonomy.



Want more information about working with the Yeti taxonomy viewer? Click here for detailed documentation. Questions about the Orange Button Taxonomy? Email info@xbrl.us