

CATALYST



From Data to Decisions: Maximizing the Value of Dashboards and Reports



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Have questions?

Ask them in **Sched chat** on the app!

Agenda



- ✓ Types of data
- ✓ Powerviews
- ✓ Dashboards
- ✓ Reports
 - Quick access reports
 - Configured reports
 - Sharing, Subscriptions, and Distributions
- ✓ Wrap-up: Q&A and survey

Reporting on your data

Billing period data

Uses the raw billing data as it is received from the utility vendor. This type of data is better when working with accounting functions.

Calendarized

Allocates use and cost to the month it occurred rather than the month it was billed. This type of data is better unless you need to view actual bill data from the vendor bill.

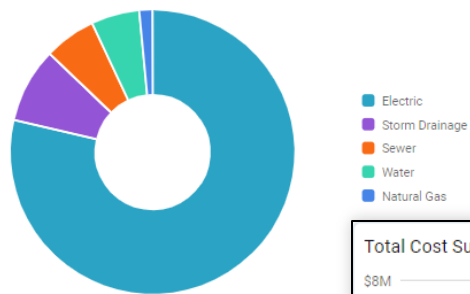
**ENERGY STAR submissions use calendarized data.*

Normalized

Removes weather as a variable. Is best when comparing use year-over-year.

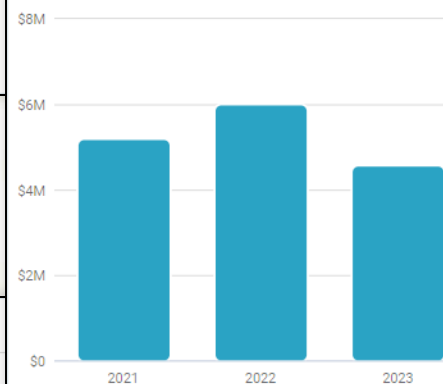
Powerviews

12-Month Commodity Cost ☺



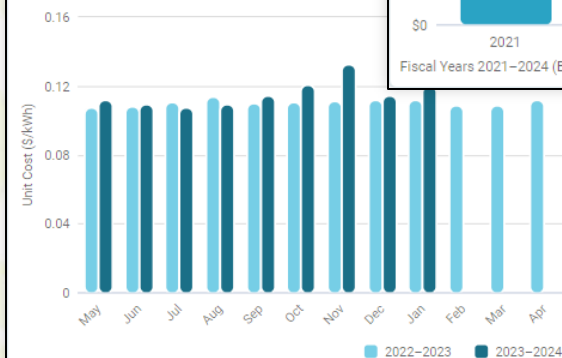
May 2023–Apr 2024

Total Cost Summary ☺



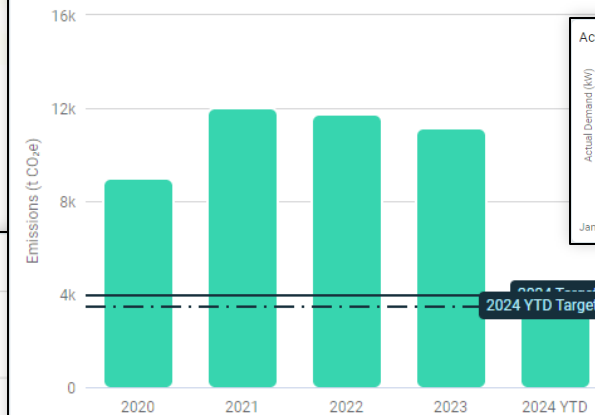
Fiscal Years 2021–2024 (Billing Period Data)

Monthly Unit Cost ☺



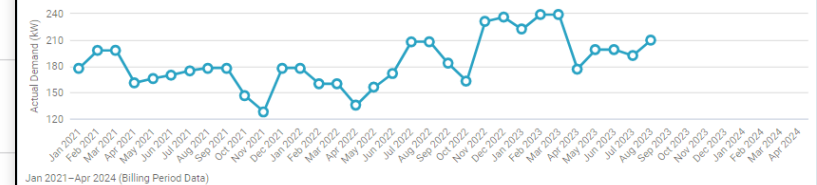
May 2022–Apr 2024 (Billing Period Data)

Carbon Footprint—Total Emissions ☺



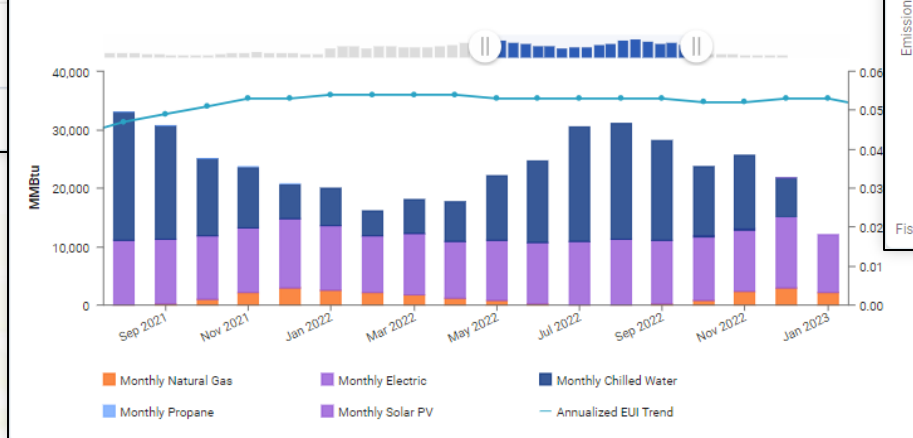
Fiscal Years 2020–2024 (Calendarized Data)

Actual Demand ☺

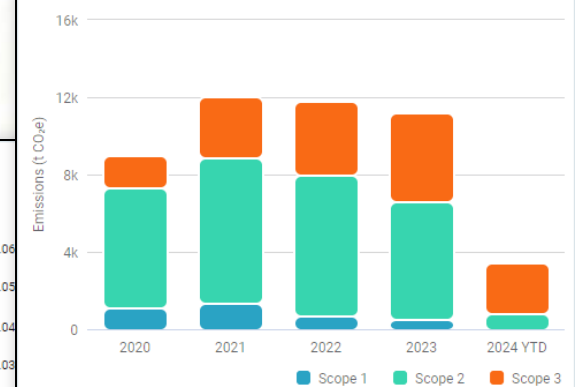


Jan 2021–Apr 2024 (Billing Period Data)

Energy Use Intensity



Carbon Footprint by Scope ☺



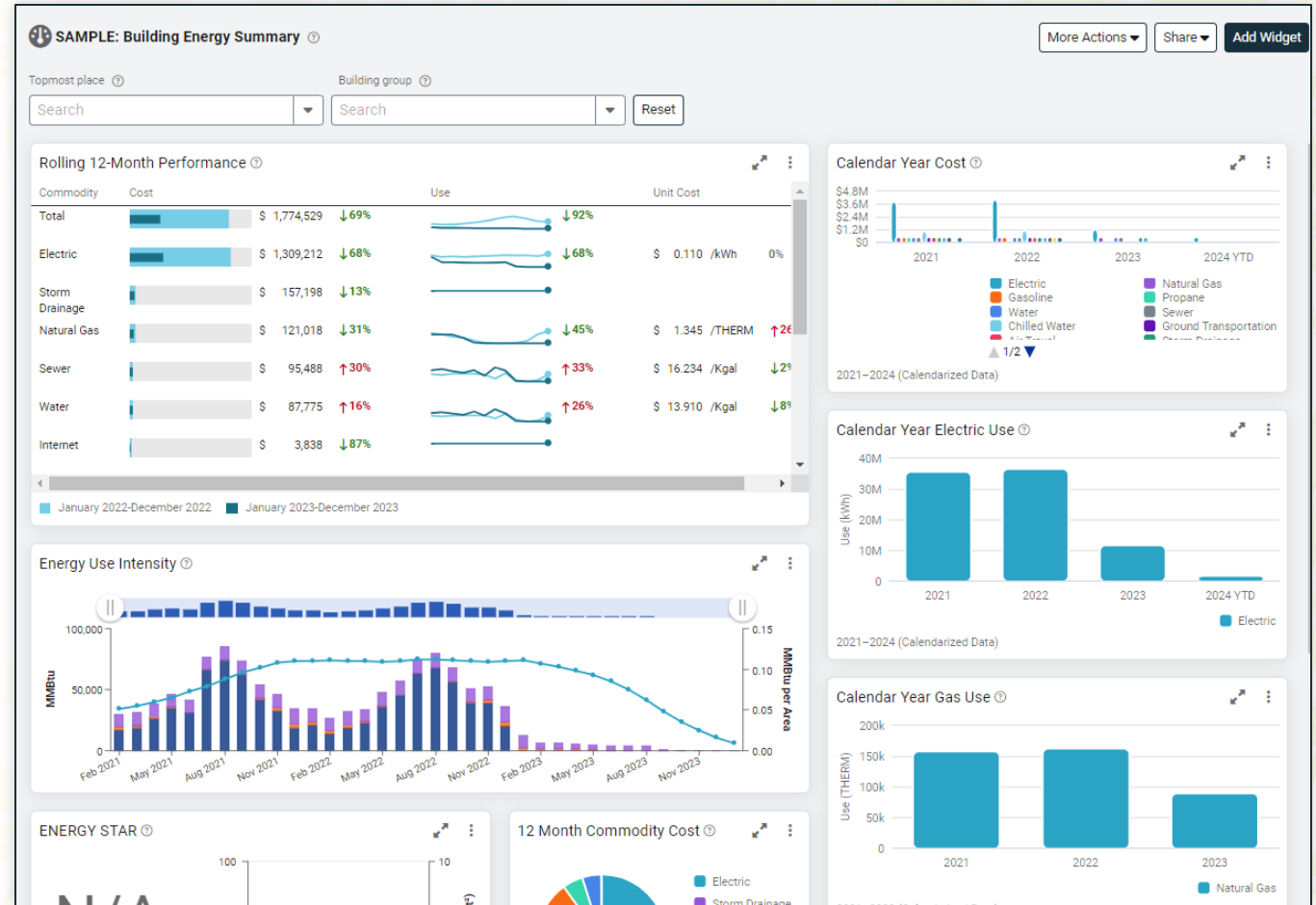
Fiscal Years 2020–2024 (Calendarized Data)

Dashboards

Dashboards

You can view and share your utility bill data with dashboards.

- Share with user groups.
- Share with the public.
- Use a global filter to quickly see a subset of your data.
- Easily copy dashboards and widgets.




Dashboards

You can share dashboards with one or more user groups (just like you do with reports) or with the public.

Sharing with the public has extra options.

Public Access Settings

CancelSave

 Not all widgets have the topmost place or building group filters available, so the global dashboard filter is not applied.

GLOBAL DASHBOARD FILTER ⓘ

☒ Show global dashboard filter

☐ Set global dashboard filter to...

☐ Hide global dashboard filter

DASHBOARD INFORMATION

Show dashboard title and description

ShowHide


LINKS ⓘ

Enable links to application




















EnableDisable

Dashboards

Manage all your dashboards with **My Dashboards**.

 **My Dashboards**

Add Dashboard

Dashboard	Description	
SAMPLE: Building Energy Summary 	Building use and cost statistics in a concise format. Use global dashboard fil	   
SAMPLE: Building Operations  	Building and Meter performance metrics within your Topmost Place	   
SAMPLE: Energy Management	Energy, Cost, and Greenhouse Gas performance metrics within your Topmost	   
SAMPLE: Utility Bill Accounting	Billing details, Vendor comparisons, and Cost Center summaries within your 1	   

4 results

Dashboards

Hands-on exercise

1. Create a new dashboard.
2. Add three widgets to your dashboard.

Reports

Quick Access Reports

EnergyCAP selected the most impactful reports and configured the filters for you.

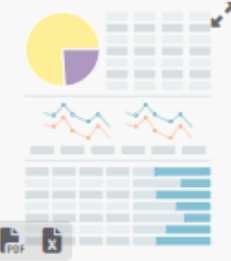
Available on:

- Organizations
- Sites
- Meters
- Cost Centers
- Accounts

Use the **Configure Advanced Options** to view and change the filter settings if needed.

Reports for City Hall


Clos



Building Performance Report

A single-page report with billing data for the current year, two-year cost and use comparisons, top three commodity line charts, and weather information.

[Building performance](#)



Monthly Building Trends, Year over Year

A line chart and data table with monthly data for three previous years.

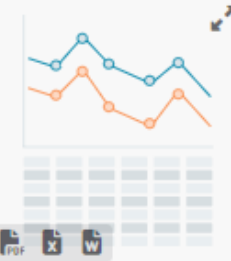
Cost

Unit cost

Use per day

Cost per day

Use



GHG Monthly Trends

A line chart and data table with monthly data for three previous years.

[GHG building trends](#)

Reports

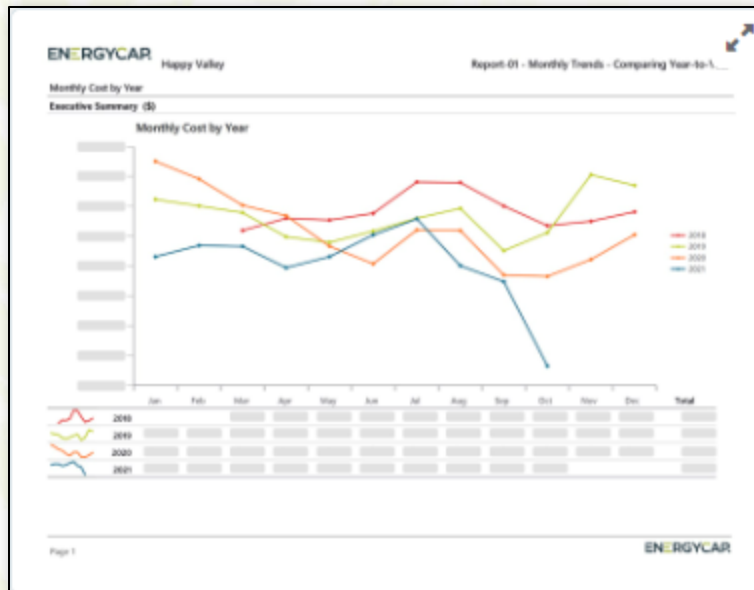
Reports can be configured in many ways. Some reports can be configured to produce a one-page executive summary or one page for each object.

To help you we've created some configured versions:

- Monthly Trends—Comparing Year-to-Year **Report-01**
- Monthly Trends—Comparing Year-to-Year – Buildings **Report-01-BLDG**
- Monthly Trends—Comparing Year-to-Year – Executive Summary **Report-01-EXEC**
- Monthly Trends—Comparing Year-to-Year – Meters **Report-01-MTR**

Reports

EnergyCAP reports have tips and instructions to help you set popular filters



A line chart and data table with monthly data for multiple years. This report is helpful to compare values across years. Variance filters can be added to highlight exceptions.

Hide instructions

Quick start instructions for popular filter settings:

1. Set **Data Displayed** (calendarized).
2. Set **Value Displayed** (cost).
3. Choose the **Date Range** (greater than 12/2017 for calendar years 2018 and later).
4. Option: To limit the report to a subset of data, set a filter such as **Topmost Place**, **Building Group**, or **Commodity**.
5. Add **Group Data By** for each page to be one object (building, meter, etc.).

Tips

- If reporting on **Cost Avoidance**, remember to run Cost Avoidance->Calculate Savings first.

Hands-on

Email a report

Send a report to your own email address using the application's built-in email feature.

Sharing, Subscriptions, and Distributions

Sharing reports

Hands-on exercise

1. After you have saved a report, you can share it with one or more user groups.
2. In My Reports, select a report.
3. Under **More Actions**, click **Share**.
4. If you're in a user group that had a report shared with it, you'll see the shared report in **Reports Shared with Me**.

Report subscriptions

You can subscribe to have reports automatically sent to you on a schedule you define.

* This is not an option with legacy reports.

Subscribe to Report

CancelSave

Report

Year-over-Year Comparison - Report-06

Recipient

josh.berkheimer@energycap.com

Emails will be sent from EnergyCAP Reports (no-reply@energycap.com)

Subject

REPORT: Year-over-Year Comparison - Report-06

Message

Please see the attached report.

Attachment file type

PDF

Repeat

Monthly

 on

1st

☒ Only send report if data is available

Report subscriptions

Hands-on exercise

1. In **My Reports**, select a report.
 - You must save a report before you can subscribe to it
2. Under **Actions**, click **Subscribe**.
3. Complete the form and Save.
4. Note the purple tag.

Report Distribution

Report distribution lets you schedule a report to be emailed to one or more user groups on a schedule you define.

As with shared reports and dashboards, report distribution honors the topmost restrictions of users.

You can send reports to non-Utility Management users.

Edit Report Distribution

CancelNext: Email Settings

Name

EnergyCAP HQ - YTD - Summary by Commodity

Report contents will be restricted to each recipient's topmost

Search filters

Recommended

☐ Account Period

☐ Building Group

☒ Date Range

☒ Group Data By

☐ Topmost Place Code

☒ Topmost Place Name

Optional

☒ Account is Active

☐ Bill is from External Vendor

☒ Bill is Void

☐ Commodity

Data Displayed

equals

Calendarized

Include Account Charges

equals

Yes

No

Account is Active

equals

Active

Inactive

Bill is Void

equals

Void

Not Void

Date Range

greater than

December

2020

Group Data By

equals

Place Type - Building

Topmost Place Name

equals

EnergyCAP, LLC HQ

Delete Distribution

1. Report Filters > 2. Email Settings

?

Pop quiz

What is the difference between a report subscription and a report distribution?

Report subscriptions are sent to the person who sets them up.

Report distributions are sent to all users in a specified user group.

What are the scheduling options for report subscriptions and distributions?

Daily
Monthly

Weekly
Quarterly

Recap

Questions?

CATALYST

We'd love to hear your thoughts!

Take a moment to share your feedback
for this session in the **Sched app**.

Your input helps us make future events even better.