

CATALYST



Advanced Reporting

Dan Flanigan &
Chris Houdeshell

Ground Rules



Lectures are boring –
discussions are WAY better!

Ask questions

Participate and **provide**
feedback!

Scenario 1

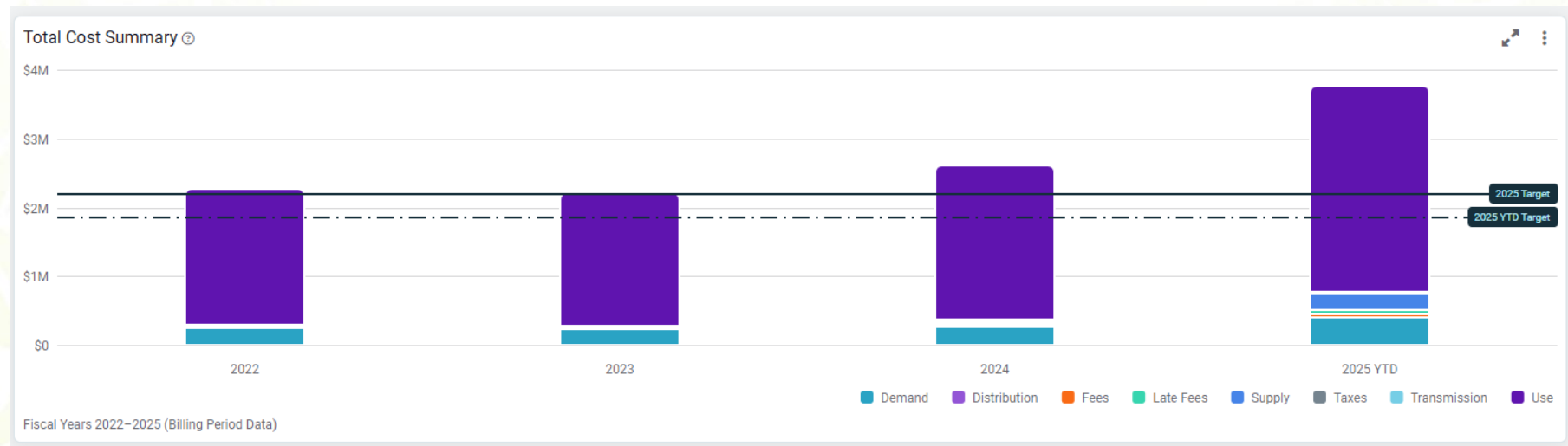


Our boss came to us and mentioned that late fees went up in 2024 and 2025. He asked us to investigate **why** and to find a **solution**.

What features can we use in EnergyCAP?

Let's Pinpoint with Power Views

- **Cost Categories** - With this option you can customize the default cost categories. These are visible in charts when you use the filter - **Group by cost category**.



Let's Validate with Reports

- **Report 18** - A data table that groups bill details by bill line type. You can filter to include one or more captions and types.

Report-18-Bill_Line_Item_Report - Saved

File Home Insert Draw Page Layout Formulas Data Review View Automate Help Power Pivot

Clipboard Font Alignment Number Styles

3/15/2024

2025 Catalyst Reporting

Report-18 - Bill Line Item

Account Code	Meter Code	Cost Center Code	Vendor Code	Start Date	End Date	Billing Period	Bill ID	Caption	Value	Unit	Cost
Late Fee											
0003 24195-801206	DOC BROWN BUILDING-	299	PGE	1/10/24	02/09/24	202401	75596	Late Fee	15 \$		\$15.20
0003 24195-801206	DOC BROWN BUILDING-	299	PGE	2/9/24	03/10/24	202402	75597	Late Fee	0 \$		\$0.00
0003 24195-801206	DOC BROWN BUILDING-	299	PGE	3/10/24	04/10/24	202403	75598	Late Fee	0 \$		\$0.00
0003 24195-801206	DOC BROWN BUILDING-	299	PGE	4/10/24	05/09/24	202404	75599	Late Fee	0 \$		\$0.00
0003 24195-801206	DOC BROWN BUILDING-	299	PGE	5/9/24	06/08/24	202405	75600	Late Fee	11 \$		\$11.40
0003 24195-801206	DOC BROWN BUILDING-	299	PGE	6/8/24	07/10/24	202406	75601	Late Fee	4 \$		\$3.80
0003 24195-801206	DOC BROWN BUILDING-	299	PGE	7/10/24	08/08/24	202407	75602	Late Fee	15 \$		\$15.20
0003 24195-801206	DOC BROWN BUILDING-	299	PGE	8/8/24	09/06/24	202408	75603	Late Fee	8 \$		\$7.60
0003 24195-801206	DOC BROWN BUILDING-	299	PGE	9/6/24	10/06/24	202409	78021	Late Fee	120 \$		\$120.27

CATALYST

Report Designer BI

Powerviews

Dashboards

Bill Lists

Reports

Report Designer BI

More customization
and flexibility



Visualizing and analyzing your EnergyCAP data

Report Designer BI: Your data, your way!

HOME Executive Summary

Topmost Place

University Park

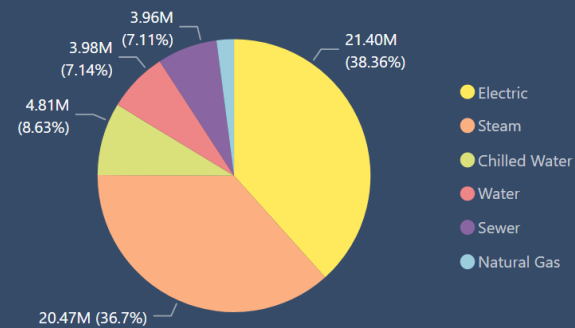
1/1/2020

12/31/2020

BACK

NEXT

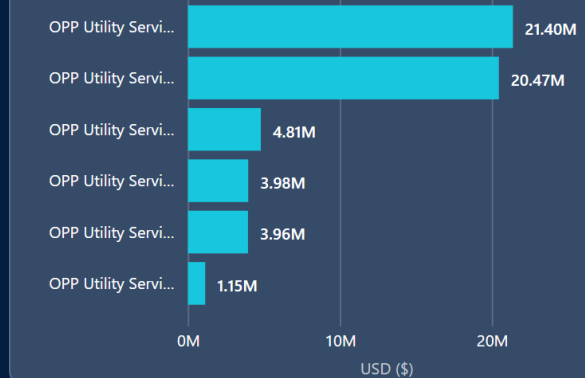
Cost by Commodity



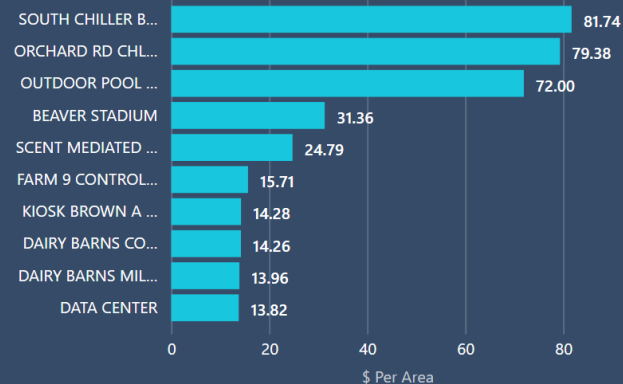
Monthly Cost Trend



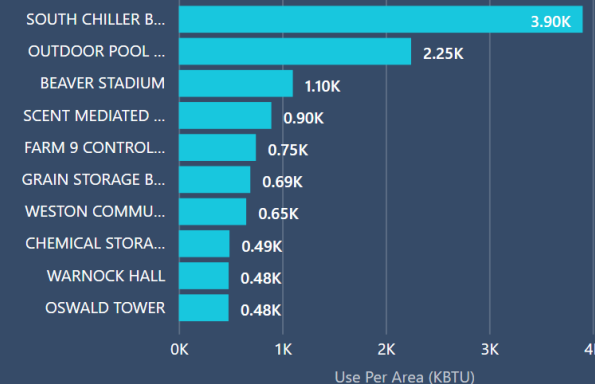
Top 10 Cost by Vendor



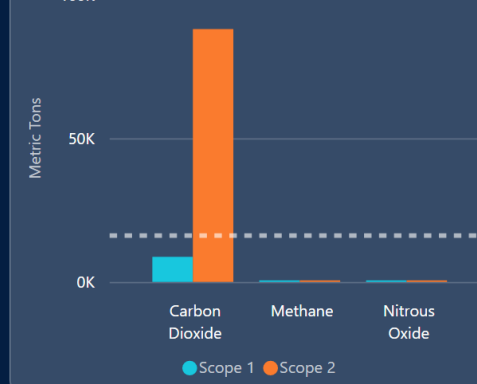
Top 10 Cost/Area by Place



Top 10 Use/Area by Place



Carbon Footprint



Standard data services that connect with your systems

ENERGYCAP®



Microsoft
Analysis Services



Report Designer BI: Your data, your way!

- **Report Designer BI organizes your data into an easy-to-understand data model for analysis and reporting**

30+ data tables with your EnergyCAP data

Each field documented in online data dictionary

Consistent structure/format - does not change with database updates

- **Built with widely-used and industry-standard data modeling tools/services**

Plug and play compatibility with your organization's visualization and analysis tools

Data hosted by EnergyCAP (instead of your desktop) - performance remains consistent across computers and devices

- **Ready for your organization**

Take advantage of your organization's expertise - connect your EnergyCAP data to the reporting and analysis tools you are already using

Data Types

Bills

Bill line items

Meter use/cost

Building and organization use/cost

Account use/cost

Cost center use/cost

Vendor use/cost

Building and meter groups

GL subcode and accounting export information

Greenhouse gas (GHG) emissions by building and scope

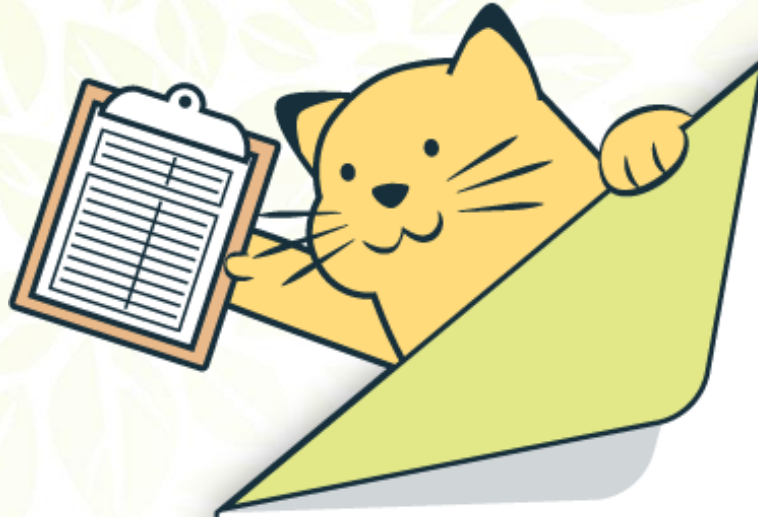
Channels and interval data

Daily weather data

Topmost place and cost center information

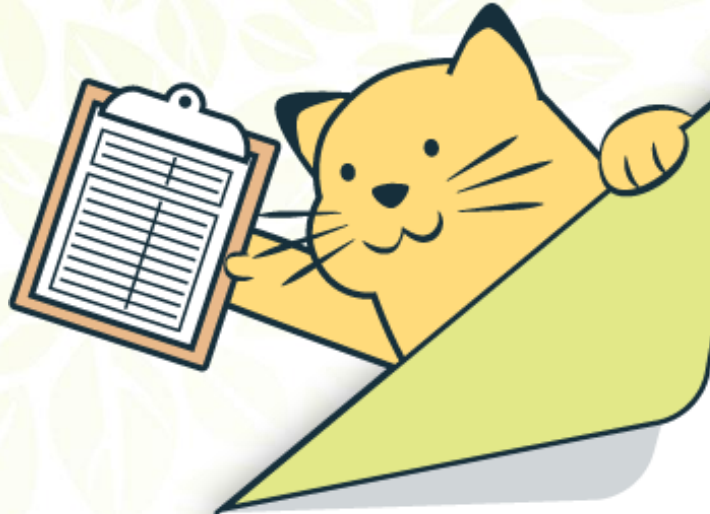
Custom Fields

Emission Sources



Our boss came to us and mentioned that late fees went up in 2024 and 2025. He asked us to investigate **why** and to find a **solution**.

Scenario 2



An HVAC company gave us a quote with **guaranteed savings** - if we sign up for a service contract for \$2,000 a year per unit. We will be guaranteed a reduction in consumption by 3%.

Scenario 3



I'd like to streamline flag management by having a view for my team to quickly navigate flags.

CATALYST

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.