

The Next Generation of EnergyCAP Reporting

CATALYST 





EnergyCAP continues to provide additional reporting options and tools

We've made a lot of **improvements** to finding and running reports in five years!

Easier filtering: **additional help** and **Configured Reports**

The next generation of "**Quick Reports**"

Sharing reports with others

Taking your reporting to the next level: **Report Designer BI**

Today's ground rules

Lectures are boring – **discussions** are WAY better!

Ask questions

Help each other – share your experiences and ideas

Participate and **provide feedback!**



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It's easier than ever to find EnergyCAP reports

The screenshot displays the EnergyCAP Reports Library interface for a user named Happy Valley (Read-Only). The interface is divided into three main sections:

- Left Sidebar:** Contains navigation icons and a list of report categories: Reports, Recent Reports, Recommended Reports, My Reports, Reports Shared with Me, Reports Library (highlighted), and Distributions.
- Main Area:** Features a search bar labeled "Search report name or description". Below it, four report cards are displayed, each with a line chart icon and a description:
 - Monthly Trends—Comparing Year-to-Year** (Report-01): 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.
 - Monthly Trends—Comparing Year-to-Year – Buildings** (Report-01-BLDG): A line chart (with data table) that reports on a variety of use and cost types for buildings and organizations. You can chart multiple years by month. Set a variance threshold and have the report automatically highlight abnormal results.
 - Monthly Trends—Comparing Year-to-Year – Executive Summary** (Report-01-EXEC): An executive one-page summary line chart and data table showing monthly data for multiple years and is helpful to compare values across years. Variance filters can be added to highlight exceptions.
 - Monthly Trends—Comparing Year-to-Year – Meters** (Report-01-MTR): A line chart (with data table) that reports on meter SUMMARY data for a variety of values including use, cost, or demand by period. For monthly meter DETAILS use Report-15. You can chart multiple years by month. Set a variance threshold and have the report automatically highlight abnormal results.
- Right Sidebar:** Contains filter options:
 - Object:** Building, Meter, Account, etc.
 - Output File Type:** Excel, PDF, Word, etc.
 - Topic:** Accounting, Facilities, etc.
 - Format:** Choose format (dropdown menu)
 - Other Attributes:** Billing Period Data, Flagged Bills, etc.
 - ☐ Show Only Reports with Charts

At the bottom of the right sidebar is a "Reset Filters" button.

It's easier than ever to find EnergyCAP reports

The screenshot displays the EnergyCAP Reports Library interface. On the left, a dark sidebar contains a vertical menu with icons for various report types. The 'Reports' section is highlighted with a yellow box, showing a list of categories: Recent Reports, Recommended Reports, My Reports, Reports Shared with Me, Reports Library (selected), and Distributions. The main area is titled 'Reports Library' and features a search bar labeled 'Search report name or description'. Below the search bar, four report cards are displayed, each with a line chart icon and a brief description. The first card is 'Monthly Trends—Comparing Year-to-Year' (Report-01), the second is 'Monthly Trends—Comparing Year-to-Year – Buildings' (Report-01-BLDG), the third is 'Monthly Trends—Comparing Year-to-Year – Executive Summary' (Report-01-EXEC), and the fourth is 'Monthly Trends—Comparing Year-to-Year – Meters' (Report-01-MTR). A fifth card, 'Ranking Report', is partially visible at the bottom. On the right side, a 'Filters' panel allows users to refine their search by Object, Output File Type, Topic, Format, and Other Attributes. A checkbox for 'Show Only Reports with Charts' is also present. A 'Reset Filters' button is located at the bottom of the filters panel. The top of the interface shows the user's name 'Happy Valley (Read-Only)' and a red notification icon.

Reports

- Recent Reports
- Recommended Reports
- My Reports
- Reports Shared with Me
- Reports Library**
- Distributions

Reports Library

Search report name or description

Monthly Trends—Comparing Year-to-Year
Report-01

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.

Monthly Trends—Comparing Year-to-Year – Buildings
Report-01-BLDG

A line chart (with data table) that reports on a variety of use and cost types for buildings and organizations. You can chart multiple years by month. Set a variance threshold and have the report automatically highlight abnormal results.

Monthly Trends—Comparing Year-to-Year – Executive Summary
Report-01-EXEC

An executive one-page summary line chart and data table showing monthly data for multiple years and is helpful to compare values across years. Variance filters can be added to highlight exceptions.

Monthly Trends—Comparing Year-to-Year – Meters
Report-01-MTR

A line chart (with data table) that reports on meter SUMMARY data for a variety of values including use, cost, or demand by period. For monthly meter DETAILS use Report-15. You can chart multiple years by month. Set a variance threshold and have the report automatically highlight abnormal results.

Ranking Report

Filters

Object
Building, Meter, Account, etc.

Output File Type
Excel, PDF, Word, etc.

Topic
Accounting, Facilities, etc.

Format
Choose format

Other Attributes
Billing Period Data, Flagged Bills, etc.

☐ Show Only Reports with Charts

Reset Filters

Navigating Reports

Reports



Recent Reports

Recommended Reports

My Reports

Reports Shared with Me

Reports Library

Distributions



Recent Reports

- The latest reports you personally have run
- Remembers your latest filter settings also

Navigating Reports

Reports



Recent Reports

Recommended Reports

My Reports

Reports Shared with Me

Reports Library

Distributions



Recommended Reports

- Group of reports that your administrator has recommended for you
- User-by-user setting

Edit User: PermissionsCancelSave

User role

View Only: All Modules

Recommended reports group

Default Reports

Accounting Reports

Default Reports

Energy Management Reports

Navigating Reports

Reports



Recent Reports

Recommended Reports

My Reports

Reports Shared with Me

Reports Library

Distributions



My Reports

- All of the reports you've saved for personal use
- Saves the report and all filters
- Any report can be saved multiple times
- Provide a custom name and description with each report

Navigating Reports

Reports



Recent Reports

Recommended Reports

My Reports

Reports Shared with Me



Reports Library

Distributions

Reports Shared with Me

- All reports shared with my User Groups by other EnergyCAP users in my organizations
- Always run with my personal Topmost permissions
- Can show/hide shared reports

Navigating Reports

Reports



Recent Reports

Recommended Reports

My Reports

Reports Shared with Me

Reports Library

Distributions

Reports Library

- All reports available to me



Navigating Reports

Reports



Recent Reports

Recommended Reports

My Reports

Reports Shared with Me

Reports Library

Distributions



Report Distributions

- Available for users with permissions to manage Report Distributions
- List of Report Distributions that have been created in your database
- All Report Distributions are shown (not just the ones you have created)

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 - Ranking Report**
- Right Sidebar:** Contains filter options:
 - Object:** Building, Meter, Account, etc.
 - Output File Type:** Excel, PDF, Word, etc.
 - Topic:** Accounting, Facilities, etc.
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 - Other Attributes:** Billing Period Data, Flagged Bills, etc.
 - ☐ Show Only Reports with Charts
 - Reset Filters** button

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- Left Sidebar:** Contains navigation icons and a list of report categories: Reports, Recent Reports, Recommended Reports, My Reports, Reports Shared with Me, Reports Library (highlighted), and Distributions.
- Main Area:** Titled "Reports Library", it features a search bar (highlighted with a yellow box) with the placeholder text "Search report name or description". Below the search bar, there are four report cards, each with a line chart icon and a description:
 - Monthly Trends—Comparing Year-to-Year** (Report-01): 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.
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- Right Sidebar:** Titled "Filters", it contains several filter sections:
 - Object:** Building, Meter, Account, etc.
 - Output File Type:** Excel, PDF, Word, etc.
 - Topic:** Accounting, Facilities, etc.
 - Format:** Choose format (dropdown menu).
 - Other Attributes:** Billing Period Data, Flagged Bills, etc.
 - ☐ Show Only Reports with Charts

At the bottom of the right sidebar, there is a "Reset Filters" button.

Searching Reports

Search report name or description

Reports Search

- Filters to reports with matching name or description
- Specific to the report list you have selected (e.g., Reports Library, My Reports, Recent Reports)

It's easier than ever to find EnergyCAP reports

The screenshot displays the EnergyCAP Reports Library interface for a user named Happy Valley (Read-Only). The interface is divided into three main sections:

- Left Sidebar (Navigation):** Contains a vertical menu with icons and labels for 'Reports', 'Recent Reports', 'Recommended Reports', 'My Reports', 'Reports Shared with Me', 'Reports Library' (highlighted), and 'Distributions'. A settings gear icon is at the bottom.
- Main Content Area:**
 - Reports Library Header:** Includes a search bar labeled 'Search report name or description'.
 - Report Cards:** Four cards are visible, each featuring a line chart icon, a title, a report ID, and a description:
 - Monthly Trends—Comparing Year-to-Year** (Report-01): 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.
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 - Bottom Card:** A partially visible card titled 'Ranking Report'.
- Right Sidebar (Filters):** Contains filter options for:
 - Object:** Building, Meter, Account, etc.
 - Output File Type:** Excel, PDF, Word, etc.
 - Topic:** Accounting, Facilities, etc.
 - Format:** Choose format (dropdown menu).
 - Other Attributes:** Billing Period Data, Flagged Bills, etc.
 - Show Only Reports with Charts:** A checkbox that is currently unchecked.A 'Reset Filters' button is located at the bottom of the filter section.

It's easier than ever to find EnergyCAP reports

The screenshot displays the EnergyCAP Reports Library interface for a user named 'Happy Valley (Read-Only)'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation icons and a list of report categories: Reports, Recent Reports, Recommended Reports, My Reports, Reports Shared with Me, Reports Library (highlighted), and Distributions.
- Header:** Shows the user name 'Happy Valley (Read-Only)' and standard utility icons (search, help, notifications, settings, and a red profile icon).
- Search Bar:** A text input field labeled 'Search report name or description' is positioned at the top of the report list.
- Report List:** A grid of report cards is displayed, each featuring a line chart icon, a title, a report ID, and a brief description:
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- Filters Panel (Right):** A sidebar with a yellow border containing filter options:
 - Object:** Building, Meter, Account, etc.
 - Output File Type:** Excel, PDF, Word, etc.
 - Topic:** Accounting, Facilities, etc.
 - Format:** Choose format (dropdown menu).
 - Other Attributes:** Billing Period Data, Flagged Bills, etc.
 - ☐ Show Only Reports with Charts
- Reset Filters:** A button at the bottom of the filters panel.
- Ranking Report:** A link at the bottom of the report list.

Using Report Filters

Report Filters

- Multiple options for narrowing down reports
- Can be used with search
- Tip: Pick a specific file type you're looking for

Filters

Object

Building, Meter, Account, etc.

Output File Type

Excel, PDF, Word, etc.

Topic

Accounting, Facilities, etc.

Format

Choose format



Other Attributes

Billing Period Data, Flagged Bills, etc.

☐ Show Only Reports with Charts

Using Report Filters

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- Multiple options for narrowing down reports
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- Tip: Pick a specific file type you're looking for

Output File Type

Excel, PDF, Word, etc.

Excel

Excel: Data Only

Excel: Formatted

PDF

Word

Filters

Object

Building, Meter, Account, etc.

Output File Type

Excel, PDF, Word, etc.

Topic

Accounting, Facilities, etc.

Format

Choose format ▼

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At the bottom of the right sidebar is a 'Reset Filters' button.

It's easier than ever to find EnergyCAP reports

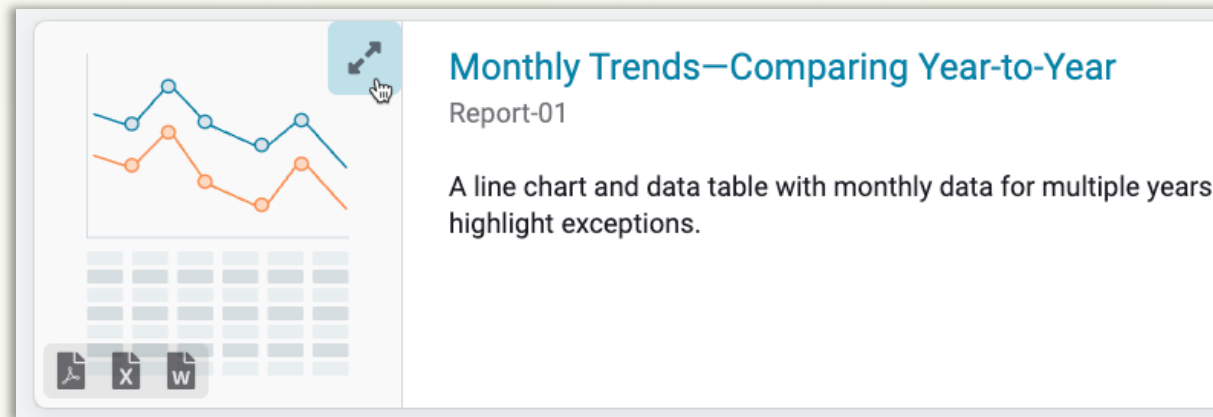
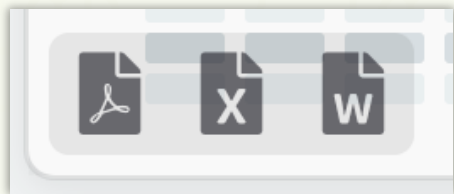
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 - Ranking Report** (partially visible at the bottom).
- Right Panel (Filters):** Contains filter options for the reports:
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 - Topic:** Accounting, Facilities, etc.
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 - ☐ Show Only Reports with Charts
 - Reset Filters** button at the bottom.

New Options Available on Report List

Report List

- Easily identify report formats available
- Click on the thumbnail to see a sample of the report
- Hide shared reports
- Quick Actions: run, email, and subscribe to reports



Hide

Actions ▲

Subscribe...

Email...

DOWNLOAD

PDF

Word

Excel

Demo: Report List Options



EnergyCAP continues to provide additional reporting options and tools

We've made a lot of **improvements** to finding and running reports in five years!

Easier filtering: **additional help** and **Configured Reports**

The next generation of "**Quick Reports**"

Sharing reports with others

Taking your reporting to the next level: **Report Designer BI**



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Helpful Instructions Now Available for Reports

ENERGYCAP

Happy Valley

Report-01 - Monthly Trends - Comparing Year-to-Year

Monthly Cost by Year

Executive Summary (\$)

Monthly Cost by Year

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2018	\$75,000	\$70,000	\$65,000	\$60,000	\$65,000	\$70,000	\$75,000	\$75,000	\$70,000	\$65,000	\$60,000	\$65,000	\$750,000
2019	\$65,000	\$60,000	\$55,000	\$50,000	\$55,000	\$60,000	\$65,000	\$65,000	\$60,000	\$55,000	\$50,000	\$55,000	\$650,000
2020	\$55,000	\$50,000	\$45,000	\$40,000	\$45,000	\$50,000	\$55,000	\$55,000	\$50,000	\$45,000	\$40,000	\$45,000	\$550,000
2021	\$45,000	\$40,000	\$35,000	\$30,000	\$35,000	\$40,000	\$45,000	\$45,000	\$40,000	\$35,000	\$30,000	\$35,000	\$450,000

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ENERGYCAP

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.

Quick start instructions for popular filter settings: Set **Data Displayed** (calendariz... [Show instructions](#)

RELATED REPORTS

[Report-08](#)

Last run 09/24/2018 2:56 am
Updated 03/01/2023, Version 18

Helpful Instructions Now Available for Reports

[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.
 - By default, this is a one-page executive summary report, use the filter **Group Data By** for a multiple-page report.
 - You must include a timeframe, either a **Date Range** or **Account Period**.
 - You can set a variance threshold and have the report highlight exceptions.
1. **Variance % from 1st yr Selected** - compares each year to the earliest year.
 2. **Variance % from prior Year** - compares each year to the prior year.

Report-01 compares multiple years for one object (Ex: A building's total commodity cost from 2015 to 2020), **Report-08** compares multiple objects for one year (Ex: Several buildings total commodity cost per month for 2020).

[More help](#) 

Helpful Instructions Now Available for Reports



- › EnergyCAP Overview
- › Using the Create button
- › Dashboards and maps
- › Buildings and Meters module
- › Accounts module
- › Bills module
- › Bill CAPture
- › Groups and Benchmarks
- › GHG accounting with CarbonHub
- › Chargebacks module
- › Interval data
- › Vendors and Rates module
- › Reports
- › Settings and Administration



In this Topic

Monthly Trends—Comparing Year-to-Year

Recommendations

Tip

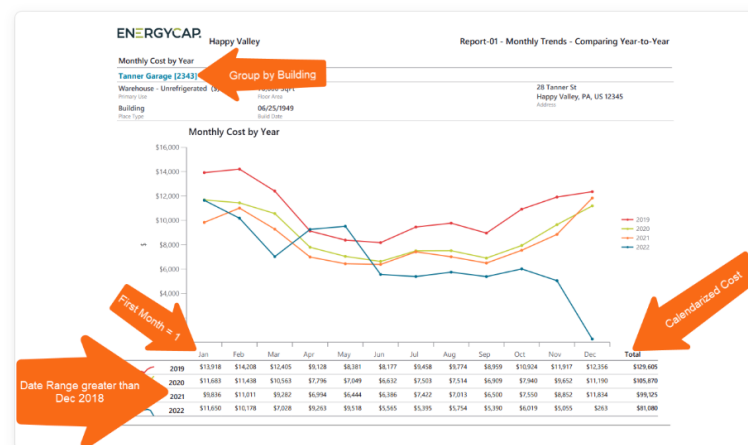
Set your filters

Other filters to consider

Configured Report-01 options

Report-01

Monthly Trends—Comparing Year-to-Year



A line chart and data table with monthly data over multiple years. This report is helpful to compare values across years.

By default, this is a one-page summary report, you can use the filter **Group Data By** to have one page per object.

Demo:

Configured Reports & Report Guides



EnergyCAP continues to provide additional reporting options and tools

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Easier filtering: **additional help** and **Configured Reports**

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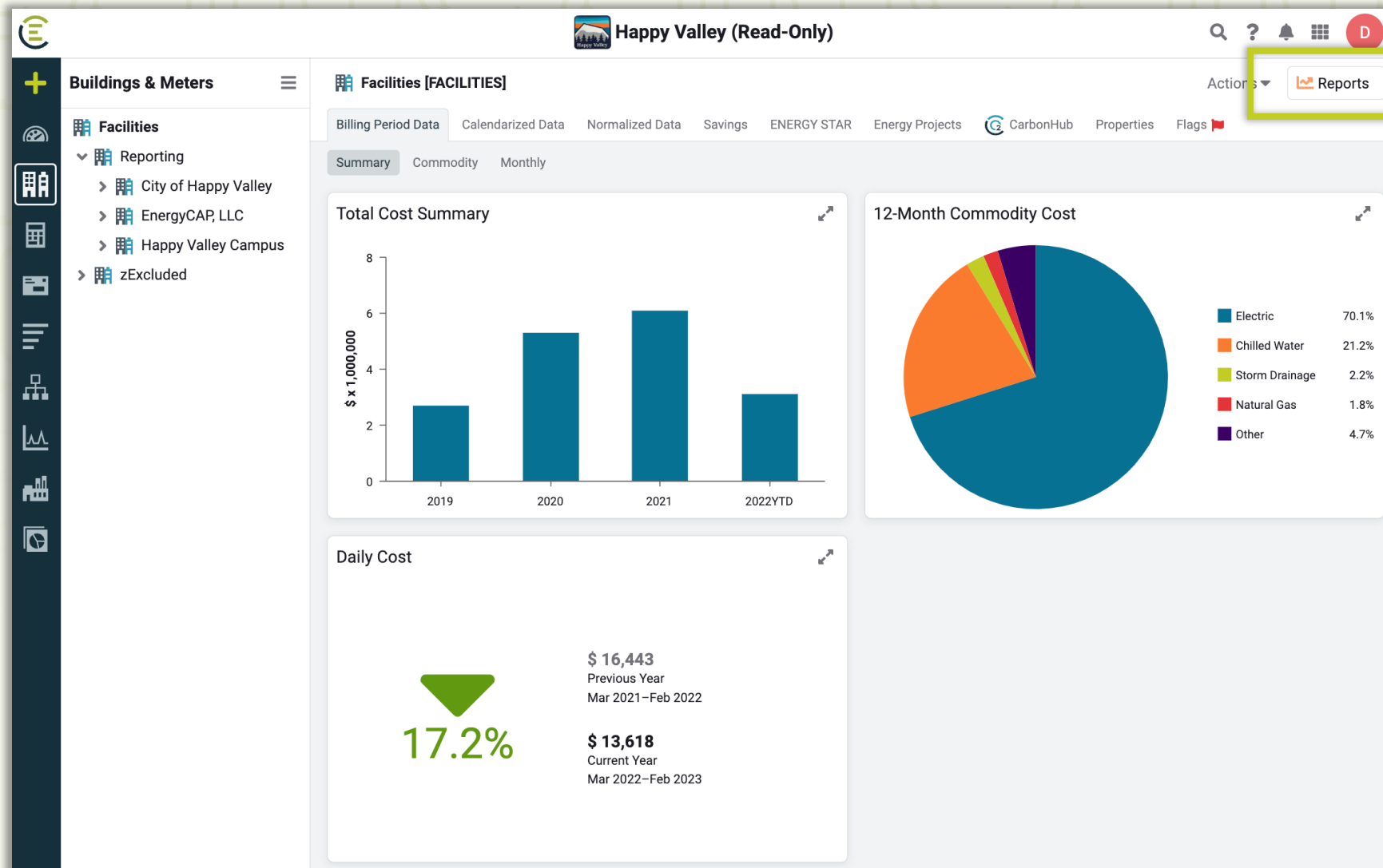
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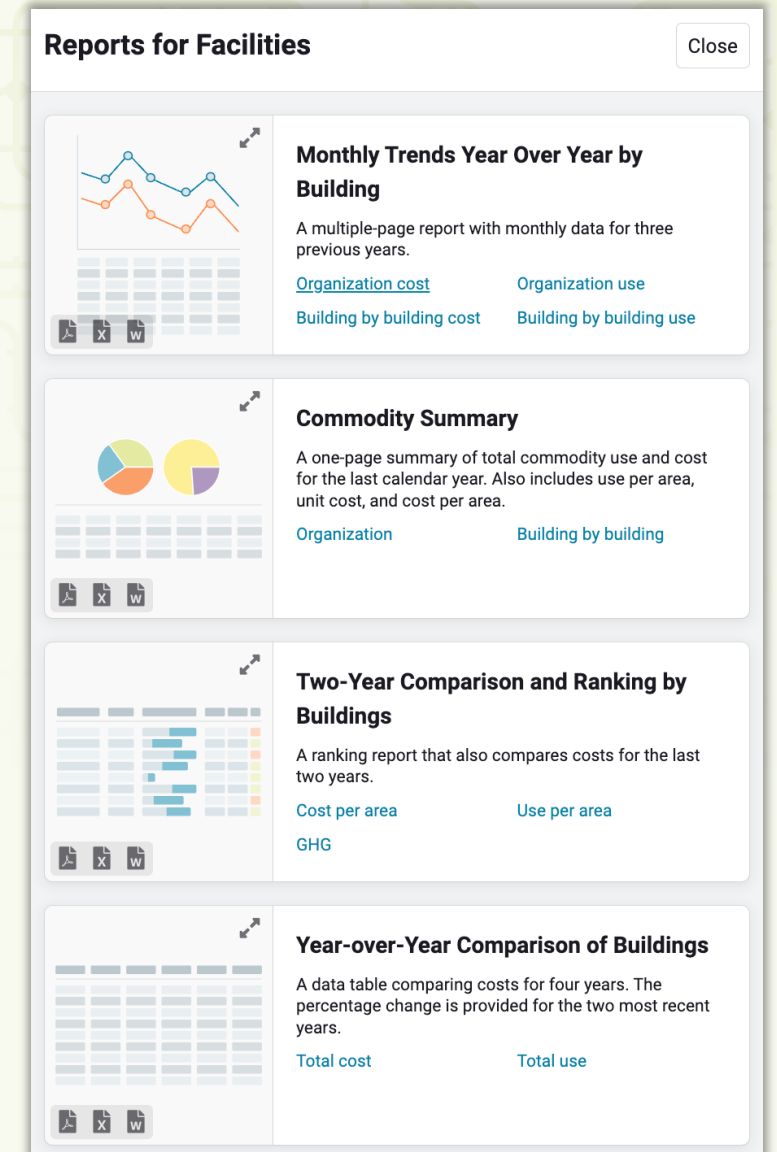
Easily access reports for all your facility and account objects



Easily access reports for all your facility and account objects

Quick Reports

- Automatically filtered to the item you are viewing
- Pre-configured with common settings
- Multiple variations/formats available
- **Great tool for getting started with reports and report filters!**



Demo: Quick Reports



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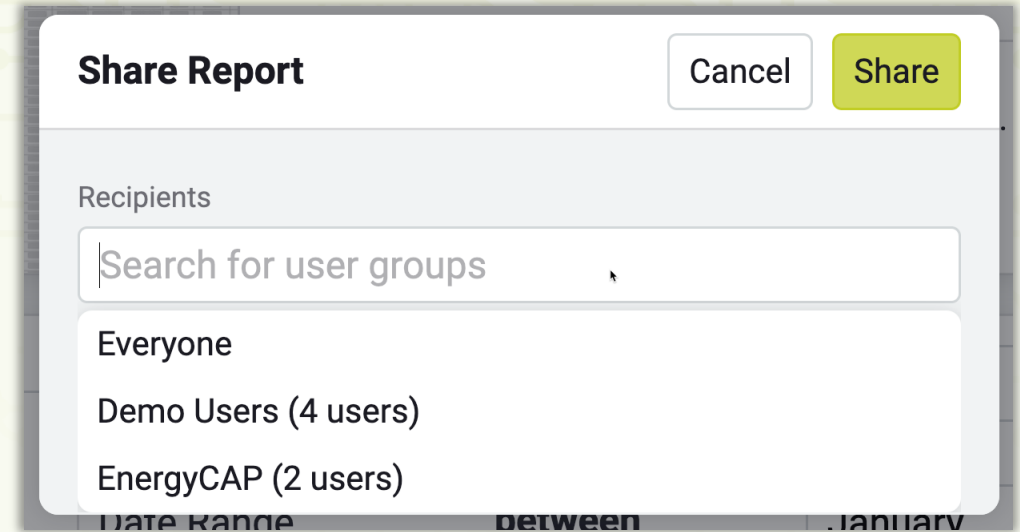
Sharing reports with others

Taking your reporting to the next level: **Report Designer BI**

Easily share reports with other EnergyCAP users

Share Report

- Share with one or more User Groups
- Each user can show/hide the report
- Reports always run with the user's Topmost permissions



The screenshot shows a 'Share Report' dialog box. At the top, there is a title bar with the text 'Share Report' and two buttons: 'Cancel' and 'Share'. Below the title bar, the section is labeled 'Recipients'. It features a search input field with the placeholder text 'Search for user groups'. Below the search field, there is a list of recipient options: 'Everyone', 'Demo Users (4 users)', and 'EnergyCAP (2 users)'. At the bottom of the dialog, there is a 'Date Range' section with the word 'between' and a date 'January'.

The power of Report Distributions

Report Distributions

- Configure a report to be sent via email on a regular basis (daily, weekly, monthly, quarterly)
- Can be sent to existing or new EnergyCAP users
- Each user receives the report with their Topmost permissions
- Emails are not sent if report is “empty”
- Each email is logged to verify recipients and information sent

Demo: Report Distributions



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Sharing reports with others

Taking your reporting to the next level: **Report Designer BI**



EnergyCAP continues to provide additional reporting options and tools

We've made a lot of **improvements** to finding and running reports in five years!

Easier filtering: **additional help** and **Configured Reports**

The next generation of "**Quick Reports**"

Sharing reports with others

Taking your reporting to the next level: **Report Designer BI**

Powerviews

Dashboards

Bill Lists

Reports

Report Designer

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

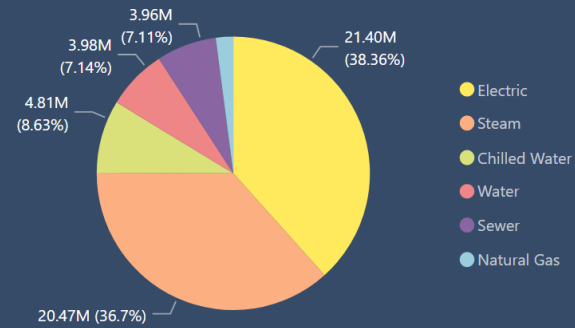
1/1/2020

12/31/2020

BACK

NEXT

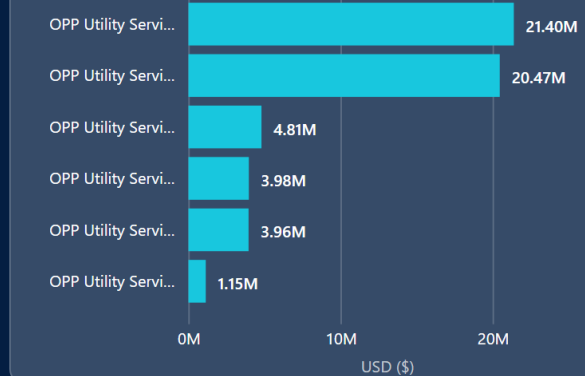
Cost by Commodity



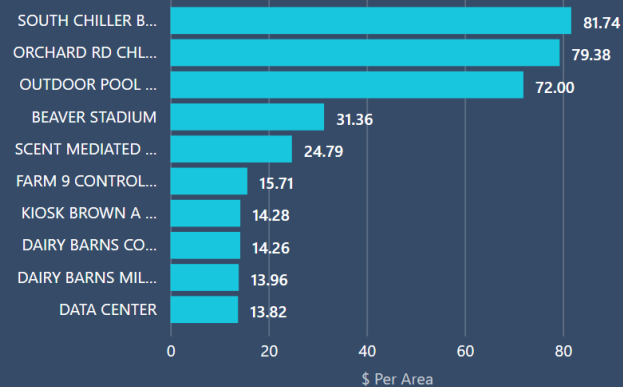
Monthly Cost Trend



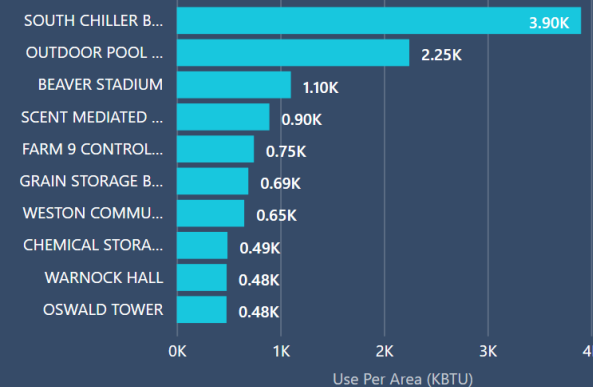
Top 10 Cost by Vendor



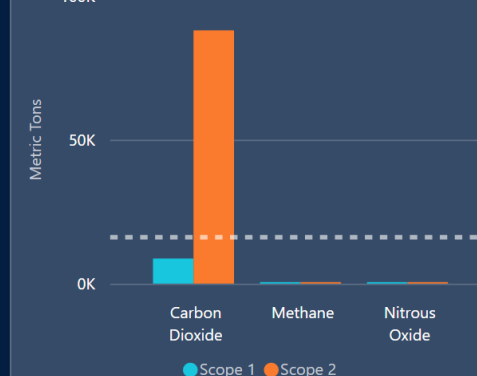
Top 10 Cost/Area by Place



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

Magic Quadrant for Analytics & BI Platforms



Microsoft as BI platform

- We're building upon industry-leading technologies that will continue to advance
- Microsoft data formats are widely supported across the industry
- You can still use the BI tools of your choice to analyze and visualize your data!

Source: Gartner, Magic Quadrant for Analytics and Business Intelligence Platforms - April 2022

Help Resources

Descriptive data dictionary for all fields in data model

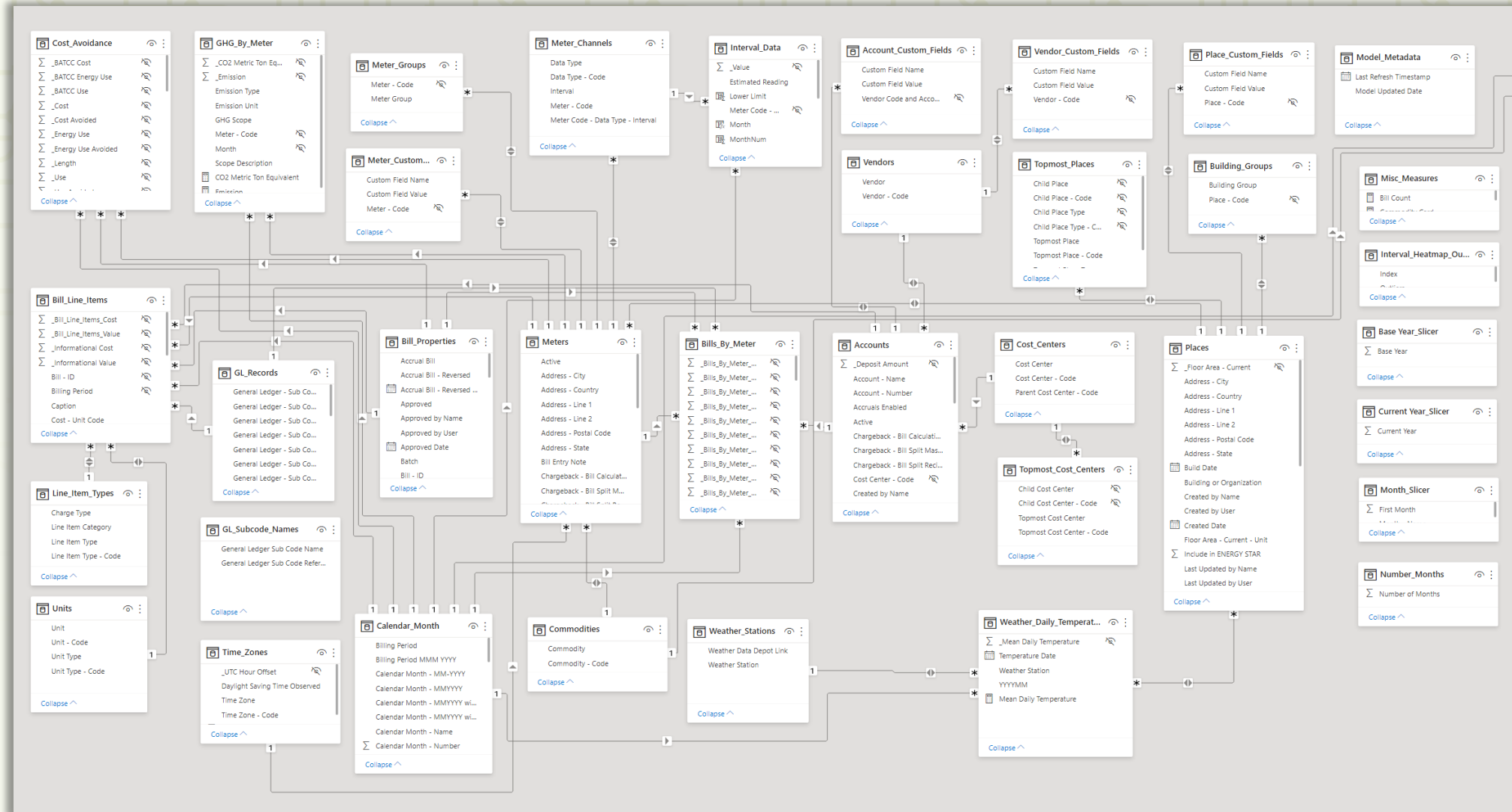
Online documentation in User Guide

Connection information and how-to instructions are available

EnergyCAP users may submit ideas to inform future template development and request support/training/consultation

Example Power BI file available to demonstrate ways to make the most of your Report Designer BI subscription

Report Designer BI Data Model



Report Designer BI 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

Data Dictionary

Data Dictionary

Table: Accounts

Previous Version: Accounts

Column Name	Prior version column name	Description	Data Type	Max Length (bytes)
Account - Name	Account Name	Descriptive name for account.	varchar(50)	50
Account - Number	Account Code	Unique account number per vendor	varchar(50)	50
Accruals Enabled	Accrual Enabled	Can accrual bills be created for this account?	bit	1
Active	Status	Is this account currently active?	bit	1
Chargeback - Bill Calculation		Are bills calculated for this account as part of a bill calculation? (chargeback type)	bit	1
Chargeback - Bill Split Master		Are bills from this account split to other accounts as a bill split master? (chargeback type)	bit	1
Chargeback - Bill Split Recipient		Does this account receive bills from a bill split account? (chargeback type)	bit	1

Online Documentation

Report Designer BI overview

Intro to Report Designer BI

Report Designer BI is an optional service that organizes and publishes your data for visualization and analysis with third-party tools such as Tableau and Microsoft Excel. Your data is provided in a well-documented and easy-to-understand data model that integrates with your existing business intelligence (BI) tools and workflow. We provide your data in a standard format that can easily connect to your BI tools for analysis instead of a complex data workflow.

Data included in the Report Designer BI data model

The data model ([link to data model](#)) available with Report Designer BI includes sustainability data to make visualizing and analyzing data even easier.

Data types include:

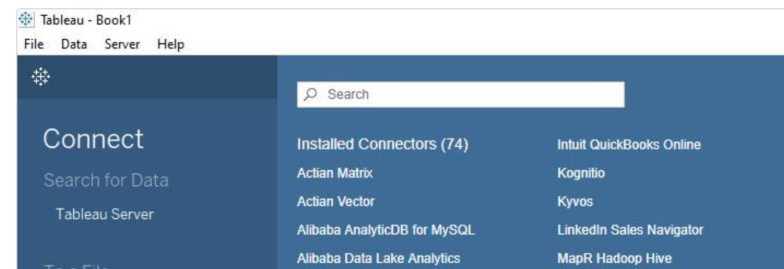
- Bills
- Bill line items
- Meter use/cost
- Building and organization use/cost
- Account use/cost
- Cost center use/cost
- Vendor use/cost
- GL subcode and accounting export information
- Greenhouse gas (GHG) emissions per building

Report Designer BI examples and connection information

Connecting to the Report Designer BI platform

Report Designer BI is built on Microsoft Azure Analysis Services. Data is available via XML for Analysis (XMLA) and SQL Server Analysis Services (SSAS) standards-based formats. The published data model includes over 30 data tables and relationships. Data is refreshed daily.

Any BI tools and services that support Microsoft Analysis Services should be able to connect to Report Designer BI and access your EnergyCAP data. This includes popular BI toolsets such as Tableau, IBM Cognos Analytics, Microsoft Power BI, and Microsoft Excel. Your data is provided in a well-documented and easy-to-understand data model ([link to data model](#)) that easily integrates with your existing business intelligence (BI) tools and workflow.



RELATED TOPICS

- [Report Designer BI Data Dictionary](#)
- [Report Designer BI Examples and Connection Information](#)
- [Reports Overview](#)
- [SSRS Reports](#)

Was this page helpful?

☐ Yes ☐ No

How can we improve this content?

Name (optional)

E-mail (optional)

Example Power BI File Available



Demo: Report Designer BI

Report Designer BI Details

We continue to add data types and information as EnergyCAP grows

Available for all hosted customers

Questions?

Session Survey

conferences.energycap.com/surveys



THE NEXT GENERATION OF
ENERGYCAP REPORTING

Report Designer BI



David Ulmer

Chief Product & Technology Officer



Today's Ground Rules

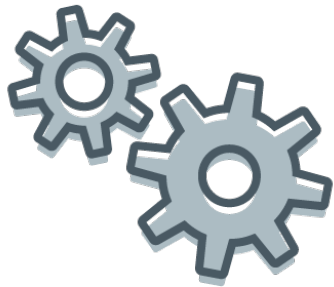
Lectures are boring — **discussions** are WAY better!

Ask questions

Help each other — share your experiences and ideas

Participate and provide feedback!

Making your life better



easier.



smarter.



friendlier.

PowerViews

Dashboards

Bill Lists

Reports

Report Designer

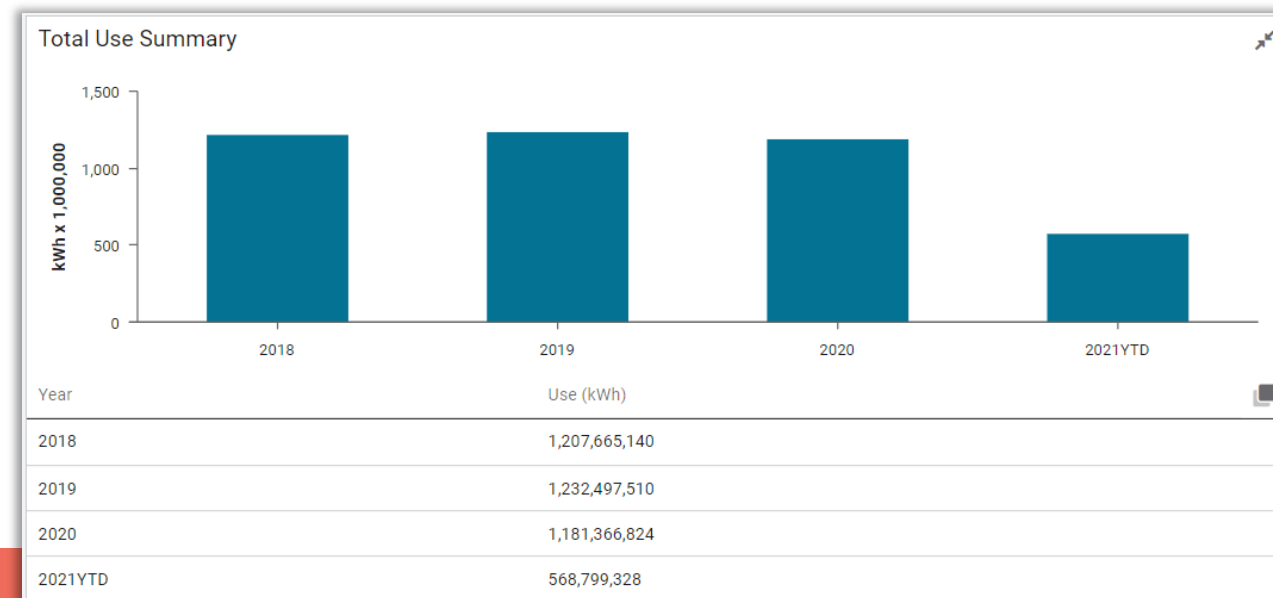
Report Designer BI

*More customization
and flexibility*



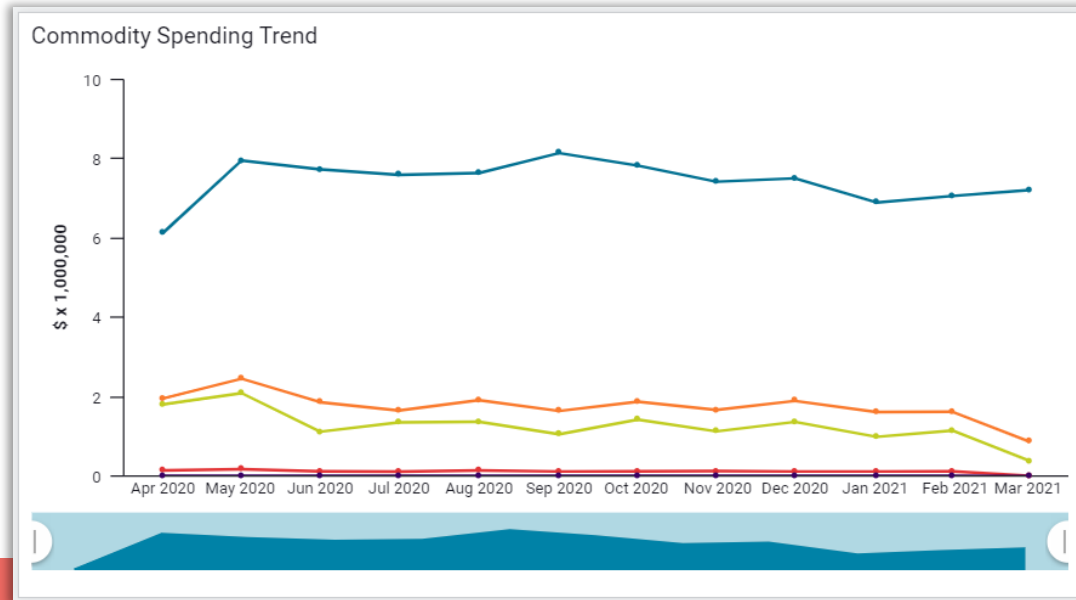
Visualizing and analyzing your EnergyCAP data

PowerViews



At a glance visualization. Automatic, but no customization

Dashboards



Edit Commodity Spending Trend

Cancel Save

Title
Commodity Spending Trend

Filters

Search filters

Recommended

- ☐ Building Group
- ☐ Meter Group
- ☐ Topmost Cost Center Code
- ☐ Topmost Cost Center Name
- ☐ Topmost Place Code
- ☐ Topmost Place Name

Optional

- ☐ Account Code
- ☒ Account is Active
- ☐ Account Name

Billing Period: prior 12 month

Chart Type: equals Line Chart

Data Displayed: equals Actual

Group Data By: equals Commodity

Show Legend: equals Yes No

Value Displayed: equals Cost

Account is Active: equals Active Inactive x

Bill is Void: equals Void Not Void x

Include Accruals: equals Yes No x

Content type: Trend Chart

Customizable. Using provided widgets/visualizations.

Bill Lists



Default Bill List

1 - 47 of 47

\$ 171,064.29 Total Cost of 47 Bills

Filters Columns

Cancel Apply Apply and Close

Search filters

Billing Period prior 12 months (includes c

Topmost Cost Center Name equals Environmental S

Recommended

- ☐ Account is Active
- ☐ Bill is From a Vendor
- ☐ Bill is Void
- ☒ Billing Period

Optional

- ☐ Account Code
- ☐ Account Name
- ☐ Account Period
- ☐ Approved
- ☐ Approved By
- ☐ Approved On

Unresolved Resolved Void Held from export Accrual Part of a reversal

Default Bill List

1 - 100 of 626

\$ 2,161,570.25 Total Cost of 626 Bills

Filters Columns

	Account Code - 1	Billing Period - 2	Bill Begin Date	Bill End Date	Total Cost - 3	Bill Entry Date
<input type="checkbox"/>	0003000E05	Jan 2021	12/25/2020	01/25/2021	\$ 512.55	02/02/2021
<input type="checkbox"/>	0037002E	Jan 2021	01/01/2021	02/01/2021	\$ 66.15	02/03/2021
<input type="checkbox"/>	0037003E	Jan 2021	01/01/2021	02/01/2021	\$ 251.33	02/03/2021
<input type="checkbox"/>	0037004E	Jan 2021	01/01/2021	02/01/2021	\$ 444.10	02/03/2021
<input type="checkbox"/>	0091000E	Jan 2021	12/25/2020	01/25/2021	\$ 16,404.17	01/28/2021
<input type="checkbox"/>	0091000S	Jan 2021	01/01/2021	02/01/2021	\$ 36,934.28	02/02/2021
<input type="checkbox"/>	0091000W	Jan 2021	12/16/2020	01/18/2021	\$ 778.39	02/02/2021
<input type="checkbox"/>	0171001E	Jan 2021	01/01/2021	02/01/2021	\$ 257.28	02/02/2021
<input type="checkbox"/>	0171001S	Jan 2021	12/15/2020	01/15/2021	\$ 6,143.55	02/01/2021

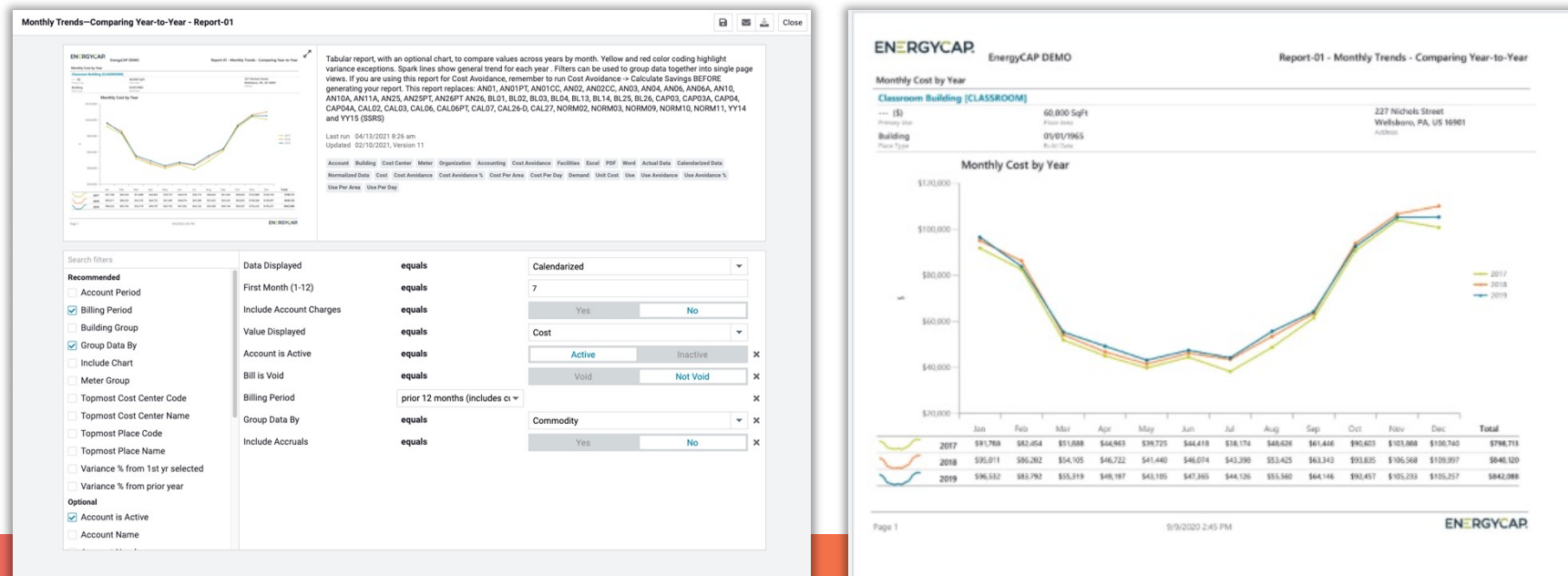
Visible Columns

- ☐ Account Code
- ☐ Billing Period
- ☐ Invoice number
- ☐ Reversal
- ☐ Creation Method
- ☐ Bill Begin Date
- ☐ Bill End Date
- ☐ Total Cost

Part of a reversal

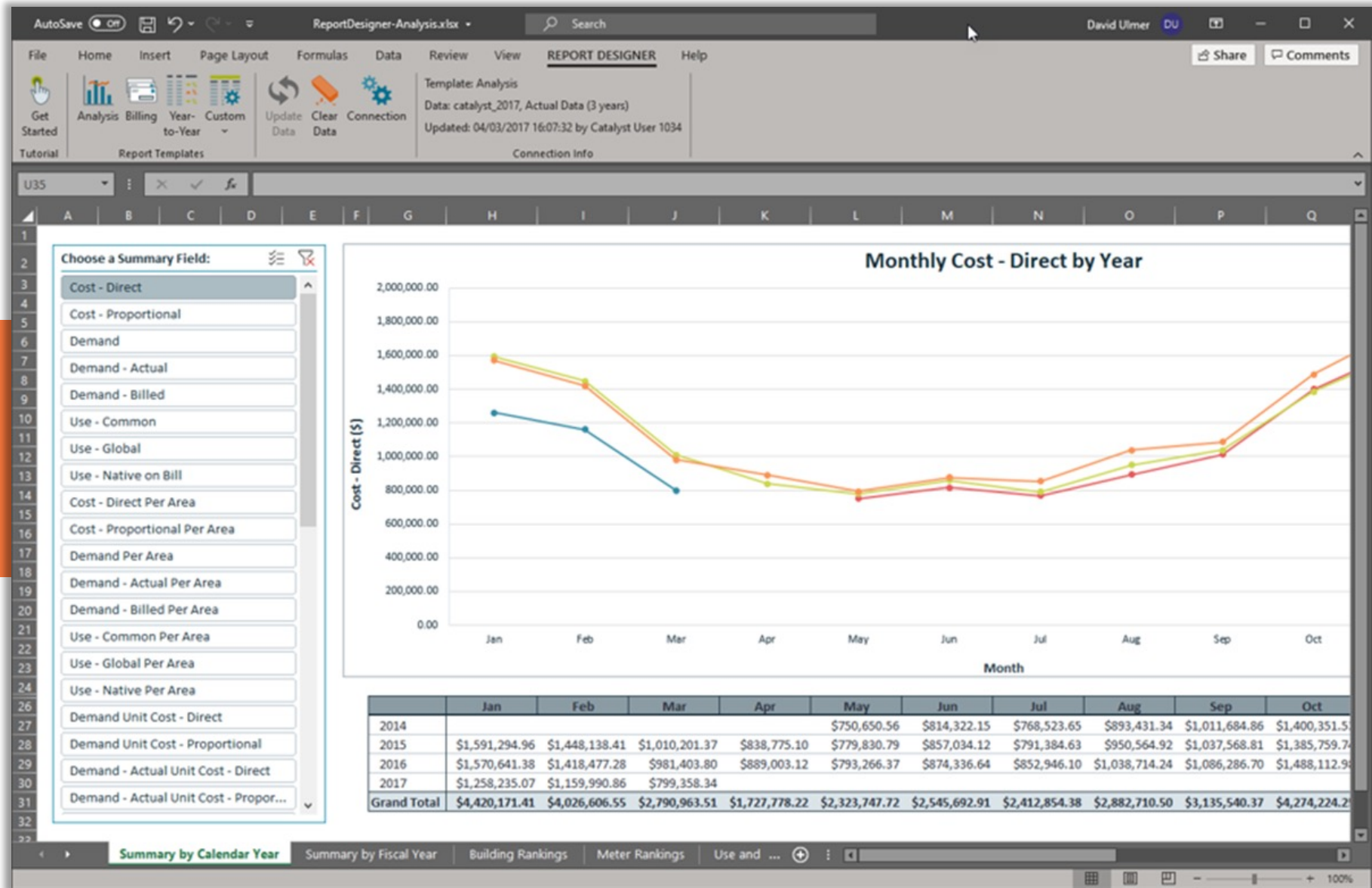
Customizable. Only tabular view.

Reports



Customizable. Use the reports/visualizations provided.

Previous Report Designer



Report Designer

Based on Microsoft Excel and PowerPivot technology

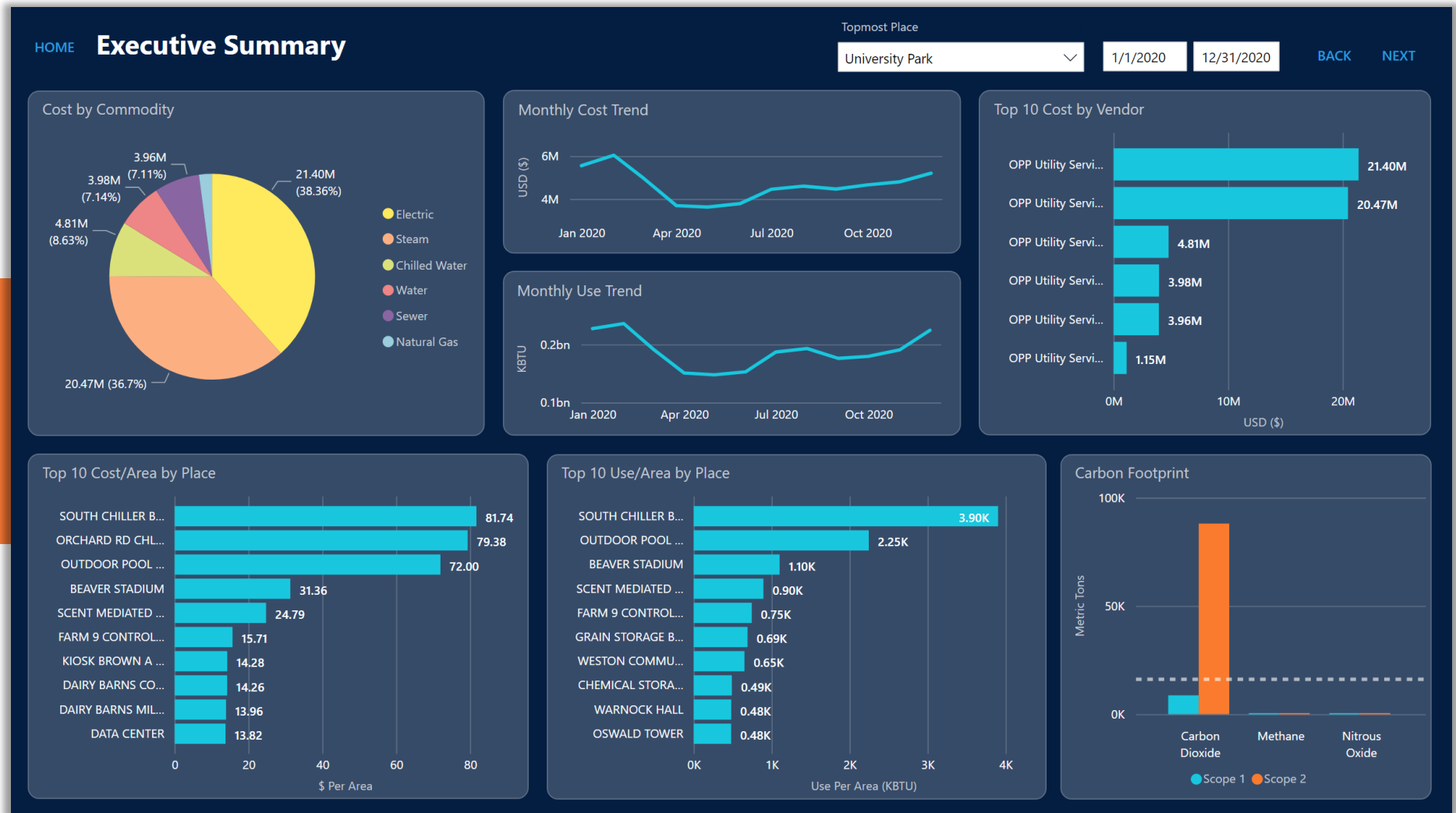
Limitations:

Required proprietary EnergyCAP plug-in

Data stored locally, limited by computing power

Report Designer BI represents the next level of customization, an upgrade that is based on commonly used and requested business intelligence technology

Report Designer BI



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Power BI



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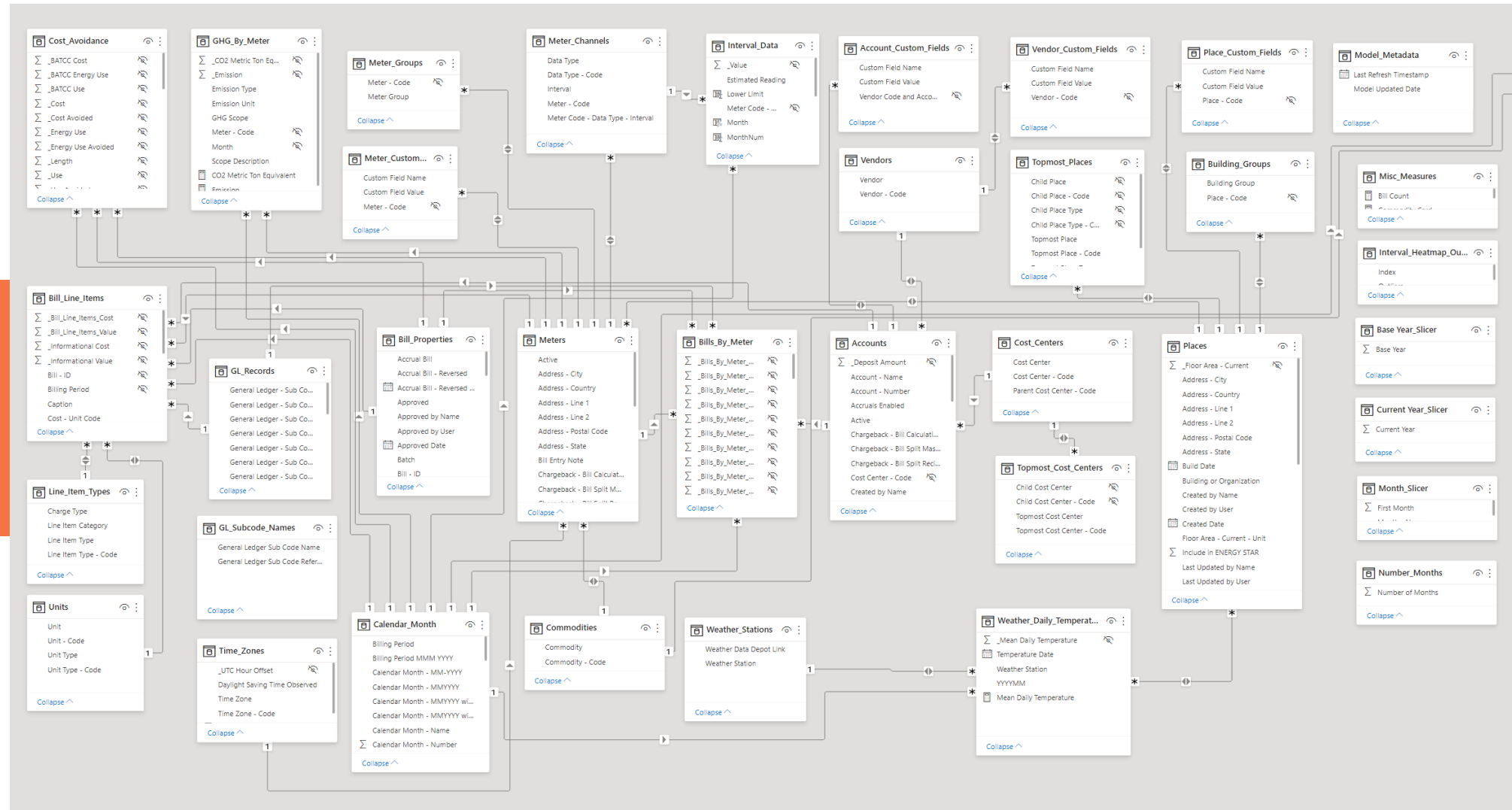
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Data Model



Data Types

Bills	GL subcode and accounting export information
Bill line items	Greenhouse gas (GHG) emissions by building and scope
Meter use/cost	Channels and interval data
Building and organization use/cost	Daily weather data
Account use/cost	Topmost place and cost center information
Cost center use/cost	
Vendor use/cost	
Building and meter groups	

Data Dictionary

Table: Accounts

Previous Version: Accounts

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Data Dictionary

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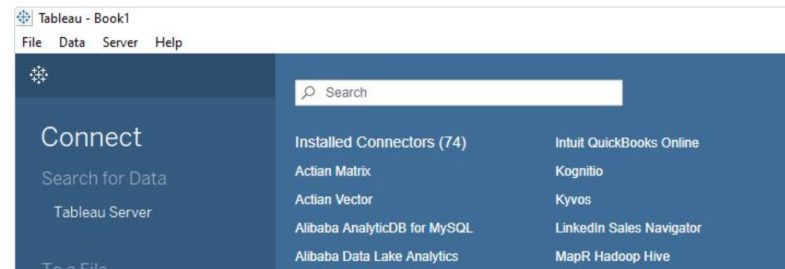
EnergyCAP User Guide

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RELATED TOPICS

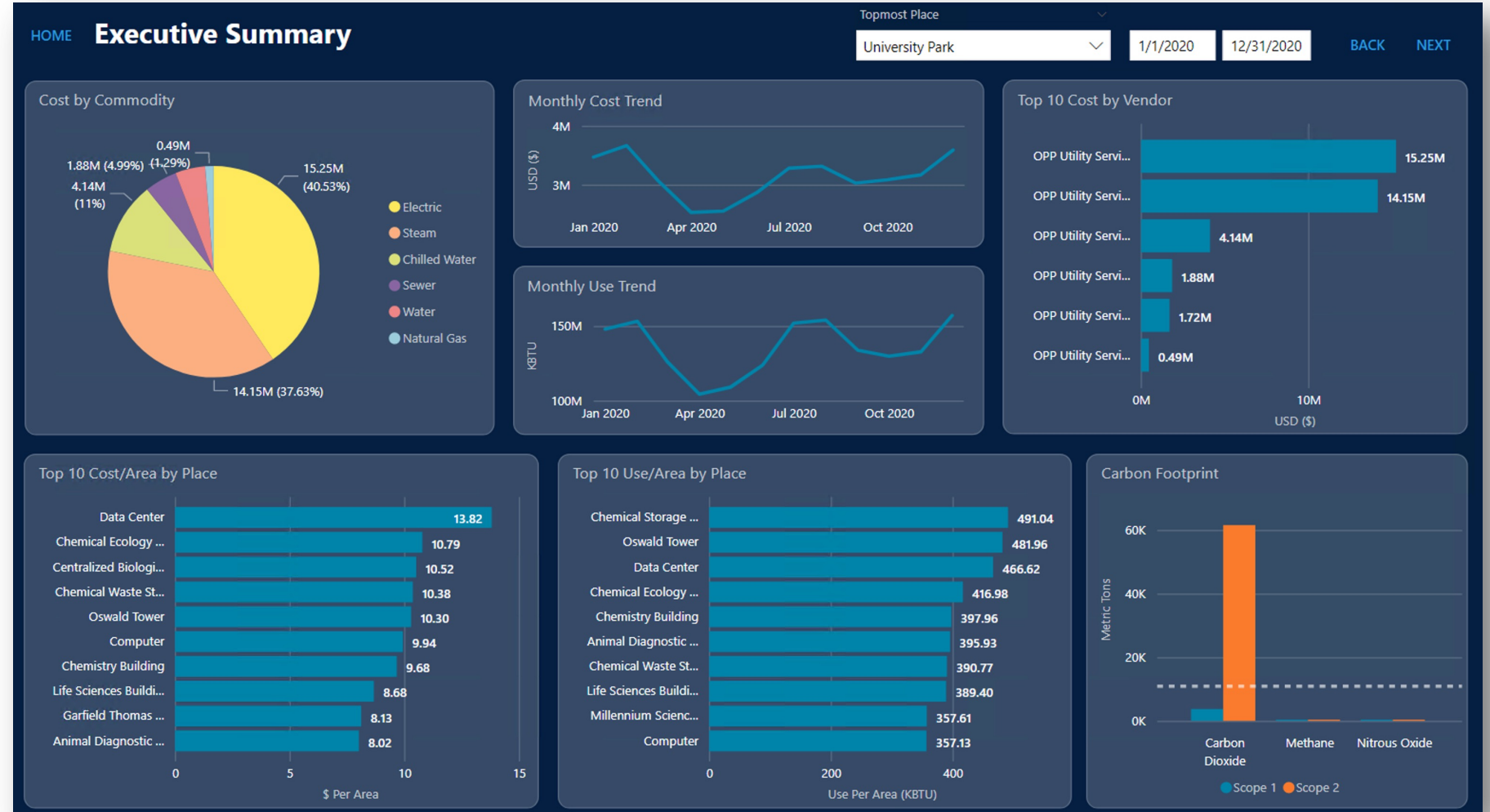
- [Report Designer BI Data Dictionary](#)
- [Report Designer BI Examples and Connection Information](#)
- [Reports Overview](#)
- [SSRS Reports](#)

Was this page helpful?

☐ Yes ☐ No

How can we improve this content?

Example Power BI File



Report Designer BI

Available to all EnergyCAP-hosted clients

Optional subscription

Contact your Account Manager for pricing – sales@energycap.com

At EnergyCAP, we're always thinking about new and better ways to provide more value from your energy and sustainability data

Report Designer BI is the next step in that progression—enabling you to take your EnergyCAP data analysis and visualization to the next level

Report Designer BI is available now, with help resources to get you started!

Frequently Asked Questions

Can I connect Report Designer BI to the BI tools that our company already uses?

Yes! Report Designer BI is built using Microsoft's Data Analysis Services which can be used with leading visualization and analysis tools. Check with your software vendor for the best way to connect with Microsoft Azure Analysis Services.

How do I access the Report Designer BI data model?

Once subscribed, use the EnergyCAP-provided connection and login information.

What if I don't have the knowledge and expertise to create my own Report Designer BI visualizations?

Upon request, EnergyCAP can provide a quote to create custom visualizations using Microsoft Excel or Power BI that meet your reporting needs.

ENERGYCAP

Questions?

**Inc.
5000**

