

# EnergyCAP 101

## Analysis and Presentment

CATALYST 





## Session Agenda

All your data is entered and verified now it's time to report back to your organization and possibly even the public!

- Grouping
- PowerViews
- Reports
  - Quick access reports
  - Configured reports
- Dashboards
  - Public Dashboards

# EnergyCAP Groups

Groups help you compare like buildings or meters.

Create your own groups based on attributes important to you.

You can use groups as a filter in dashboards, reports, and bill lists.

Groups & Benchmarks		Building Groups				
<b>Building Groups</b>						
▼ HVAC Types						
⚡ Electric Only Facilities (No Gas)						
> Place Primary Use Auto-Group						
> Reporting Groups						
<b>Meter Groups</b>						
> Commodity Auto-Group						
> HVU Calculations						
> Meter Primary Use Auto-Group						
		Building group	Members	Type	Updated	⌂ +
▼ HVAC TYPES						
		Buildings with Boilers	0	Automatic	03/14/2017	🗑️ ✎️
		Electric Only Facilities (No Gas)	4	Manual	03/08/2017	🗑️ ✎️
▼ PLACE PRIMARY USE AUTO-GROUP						
		Antenna/Communications	12	Automatic	06/22/2017	🗑️ ✎️
		General Office	4	Automatic	08/30/2021	🗑️ ✎️
		Mixed Use Property	5	Automatic	08/25/2021	🗑️ ✎️
		Other	3	Automatic	05/08/2019	🗑️ ✎️
		Other - Public Services	2	Automatic	11/23/2021	🗑️ ✎️
		Parking Structure	6	Automatic	06/08/2021	🗑️ ✎️
		Police Station	4	Automatic	08/25/2021	🗑️ ✎️

# Benefits of Groups

Most reports have the filter for building and meter groups.

This has two benefits:

- You can create your own custom groups.
- No need to rely on the tree structure for reporting.



## Two Types of Groups

**Automatic groups** – EnergyCAP automatically assigns membership based on criteria set by user.

**Manual groups** – You can select the members of the group individually, one-by-one.

Building group	Members	Type
City Buildings SQFT > 20000	24	Automatic
Emissions Tracking	32	Manual

# Create a Group





## Hands-on exercise

1. In the Groups and Benchmarks module, click Building Groups.
2. Click the **+**.
3. Enter a name for the group (*Example: John Heinz's Places > 25,000 Sq Ft*)
4. Select a category or add a new category for the group.
5. Decide if all users can see all the buildings in the group even if they don't have topmost permission.
6. Click either Automatic or Manual.
7. If Automatic add filters to include the specific buildings in the group. If Manual then select buildings.
8. Click **Save & View**.

# Create a Custom Field for a Building

## Hands-on exercise

1. In Buildings & Meters module, click the module menu over the tree view.
2. From the dropdown, select Custom Field for Buildings.
3. Click the (+) in the top right corner.
4. Select a field to use (like Yes/No) from the dropdown.
5. Enter a label for your custom field
6. Click **Save**.

Edit Custom Fields for Buildings	
Type	Label
 Yes/No	<input type="text" value="ENERGY STAR Reportable"/>
 Text	<input type="text" value="Building Notes"/>
 Web URL	<input type="text" value="Wattics Site"/>
 Yes/No	<input type="text" value="✱"/>



# Report Filters - Report 1

Search filters

Recommended

☐ Account Period

☐ Billing Period

☒ Building Group

☐ Group Data By

☐ Include Chart

☐ Meter Group

☐ Topmost Cost Center Code

Data Displayed

First Month (1-12)

Include Account Charges

Value Displayed

Account is Active

Bill is Void

Building Group

equals

equals

equals

equals

equals

equals

equals

\* ▼

Antenna/Communications

City Buildings SQFT > 20000

Electric Only Facilities (No Gas)

Emissions Tracking

ENERGY STAR Buildings

General Office

Mixed Use Property

\* ▼



# Widget Filters

Edit Bar Rank Widget

CancelSave

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

☒ Bill is Void

Color Scheme	equals	Blue	▼
Data Displayed	equals	Actual	▼
Date Range ?	equals ▼	January ▼	2022
Group Data By	equals	Place Type - Building	▼
Show First _ Values	equals	25	
Sort Descending	equals	Yes	No
Value Displayed	equals	Cost	▼
Account is Active	equals	Active	Inactive ×
Bill is Void	equals	Void	Not Void ×
Building Group	equals	City Buildings SQFT > 20000	▼ ×
Include Accruals	equals	Yes	No ×

# 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

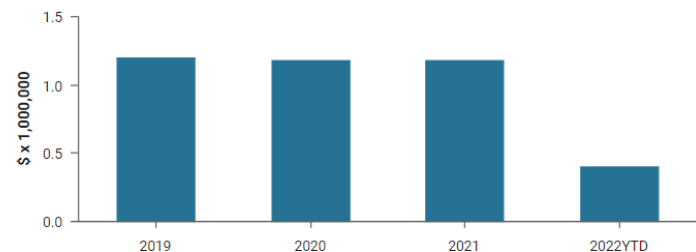
- Allocates use and cost to the month it occurred rather than the month it was billed. For year-over-year COST comparisons use calendarized data. *\*ENERGY STAR uses calendarized data.*

## Normalized

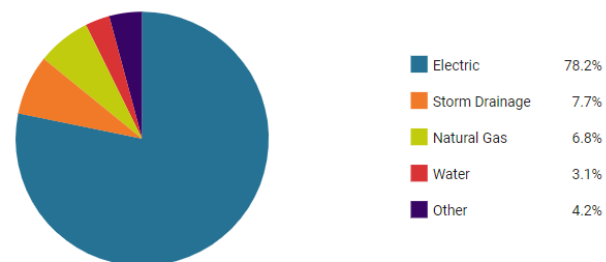
- Is best when comparing USE year-over-year because it removes weather as a variable.

# PowerViews

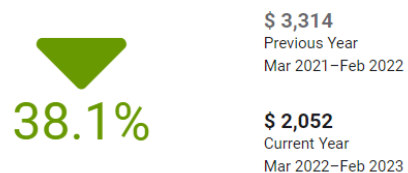
Total Cost Summary



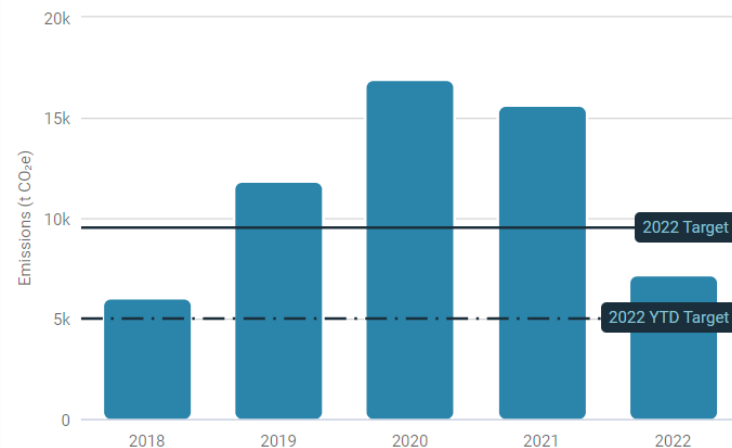
12-Month Commodity Cost



Daily Cost

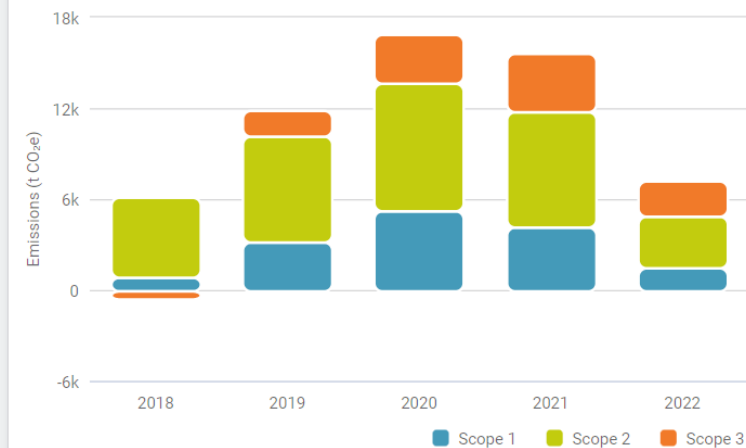


Carbon Footprint - Total Emissions



Fiscal Years 2018–2022 (Calendarized Data)

Carbon Footprint by Scope

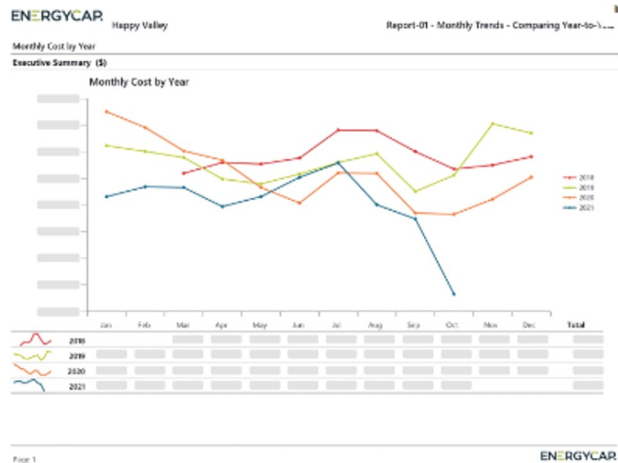


Fiscal Years 2018–2022 (Calendarized Data)

# Reports

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

## 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.

### Hide instructions

Quick start instructions for popular filter settings:

1. Set **Data Displayed** (calendarized).
2. Set **Value Displayed** (cost).
3. Chose the **Billing Period** (greater than 12/2017 for calendar years 2018 and later).
4. Option: To limit 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.

# Configured 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**

# Configured Reports

## Hands-on exercise

1. In the Reports module, find another configured report.
2. Open and review the filters.
3. Change the filters and save it to your saved reports. Remember to add your initials to the code.

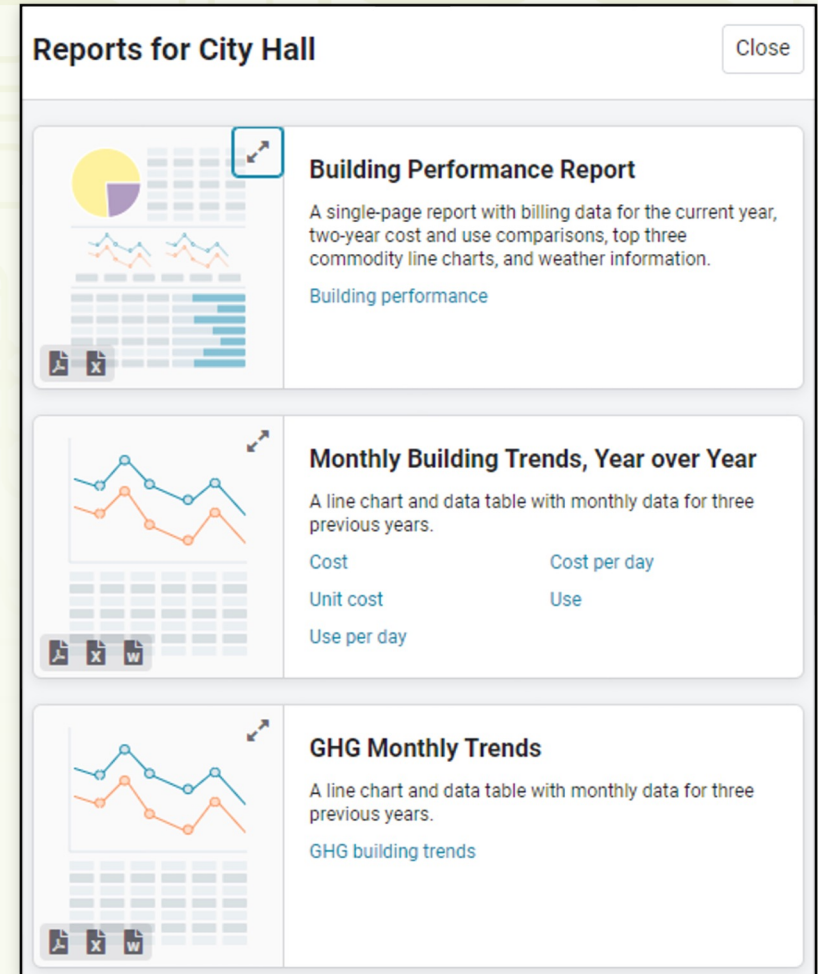
# Quick Access Reports

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

Available on:

- Organizations
- Buildings
- Meters
- Cost Centers
- Accounts

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





# Share a Report

## 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 Subscription

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

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

Recipient

testuser@example.com

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

Subject

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

Message

Please see the attached report.

Attachment file type

PDF

Repeat

Monthly

 on 

1st

☒ Only send report if data is available

# Report Subscription

## Hands-on exercise

1. In **My Reports**, select a report.
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-EnergyCAP users.

Add New Report Distribution

CancelBack: Report FiltersSave

Reply-to

testuser@example.com

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

Recipients

\* Search for user groups

Create a new user group

Subject

Report: Monthly Trends - Comparing Year-to-Year Distribution

Message

Please see the attached report.

Attachment file type

PDF

Repeat

Monthly

on

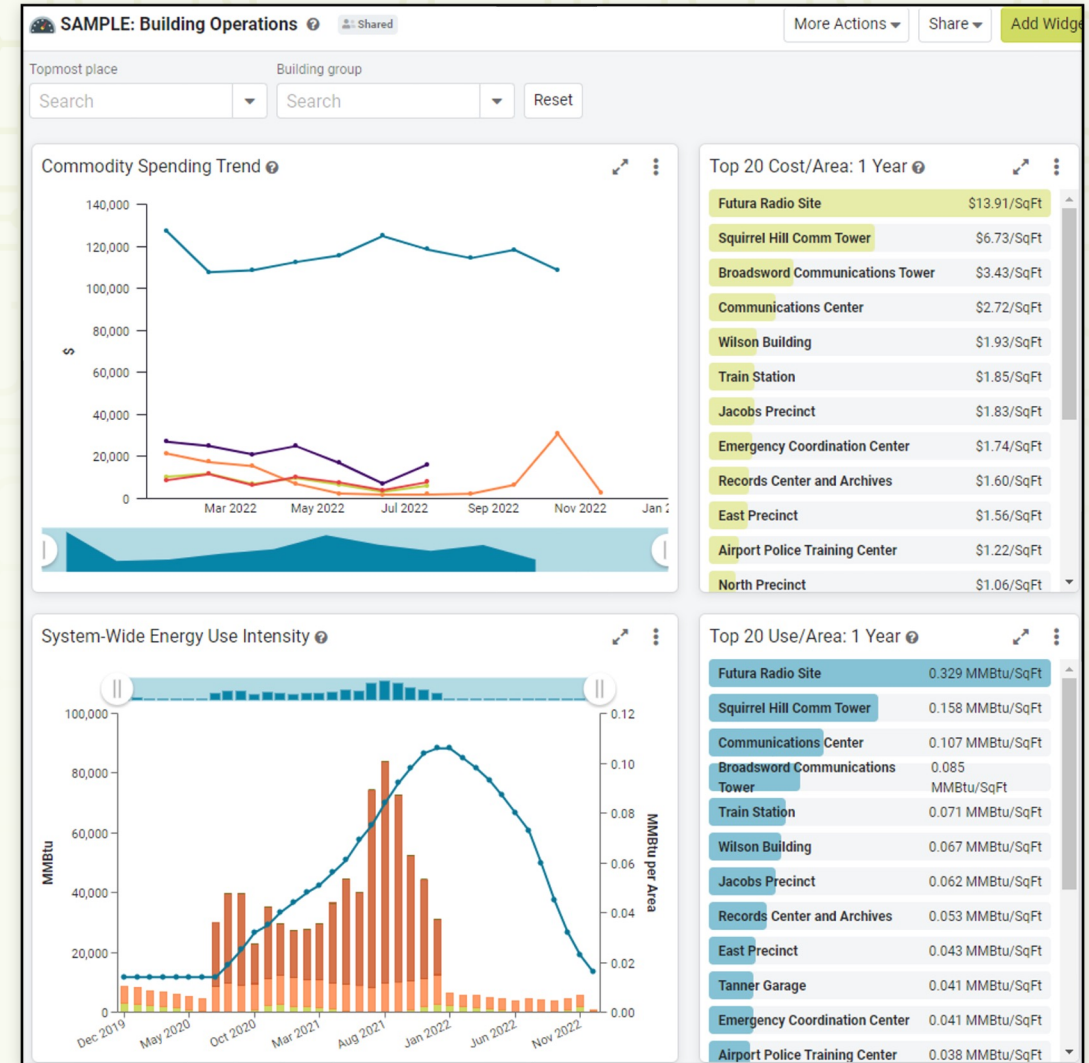
1st

☒ Only send report if data is available

# 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.
- Add a dashboard description.
- 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

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 glot	   
SAMPLE: Building Operations 	Building and Meter performance metrics within your Topmos	   
SAMPLE: Energy Management	Energy, Cost, and Greenhouse Gas performance metrics with	   
SAMPLE: Utility Bill Accounting	Billing details, Vendor comparisons, and Cost Center summa	   

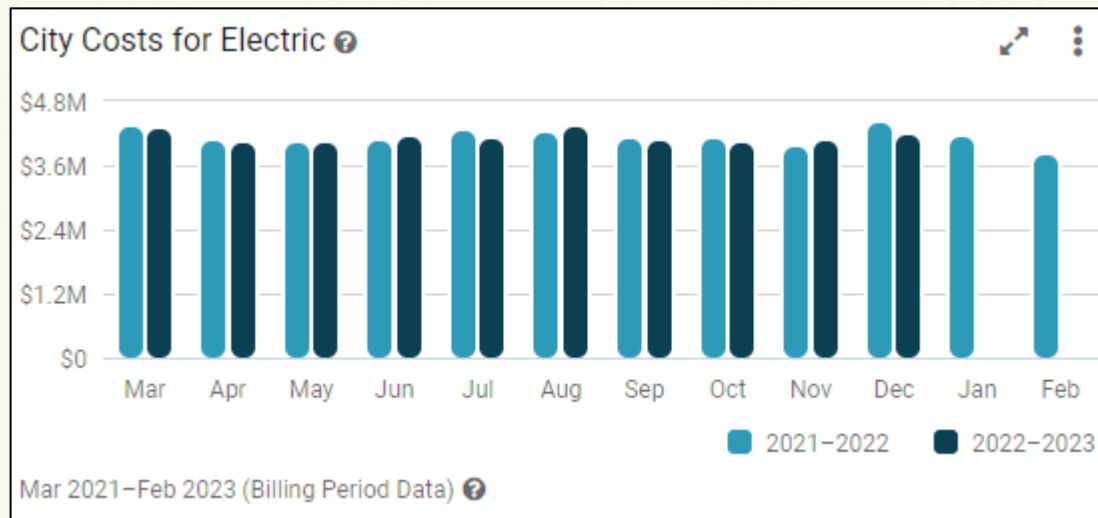
4 results



# Dashboards

## Hands-on exercise

1. Create a new dashboard.
2. Add three widgets to your dashboard. We have a new widget you may want to check out called Rolling Monthly Comparison.



# Pro Dashboard Tip

**Use Word to HTML -** <https://wordtohtml.net/>

Allows you to convert content to HTML code to use in the Text/HTML widget.

Create custom content easily.

Edit Text, HTML, and Images Widget

Cancel

Save

Title

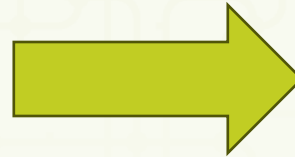
Fire Administration Building (FAB) Ener!

Description

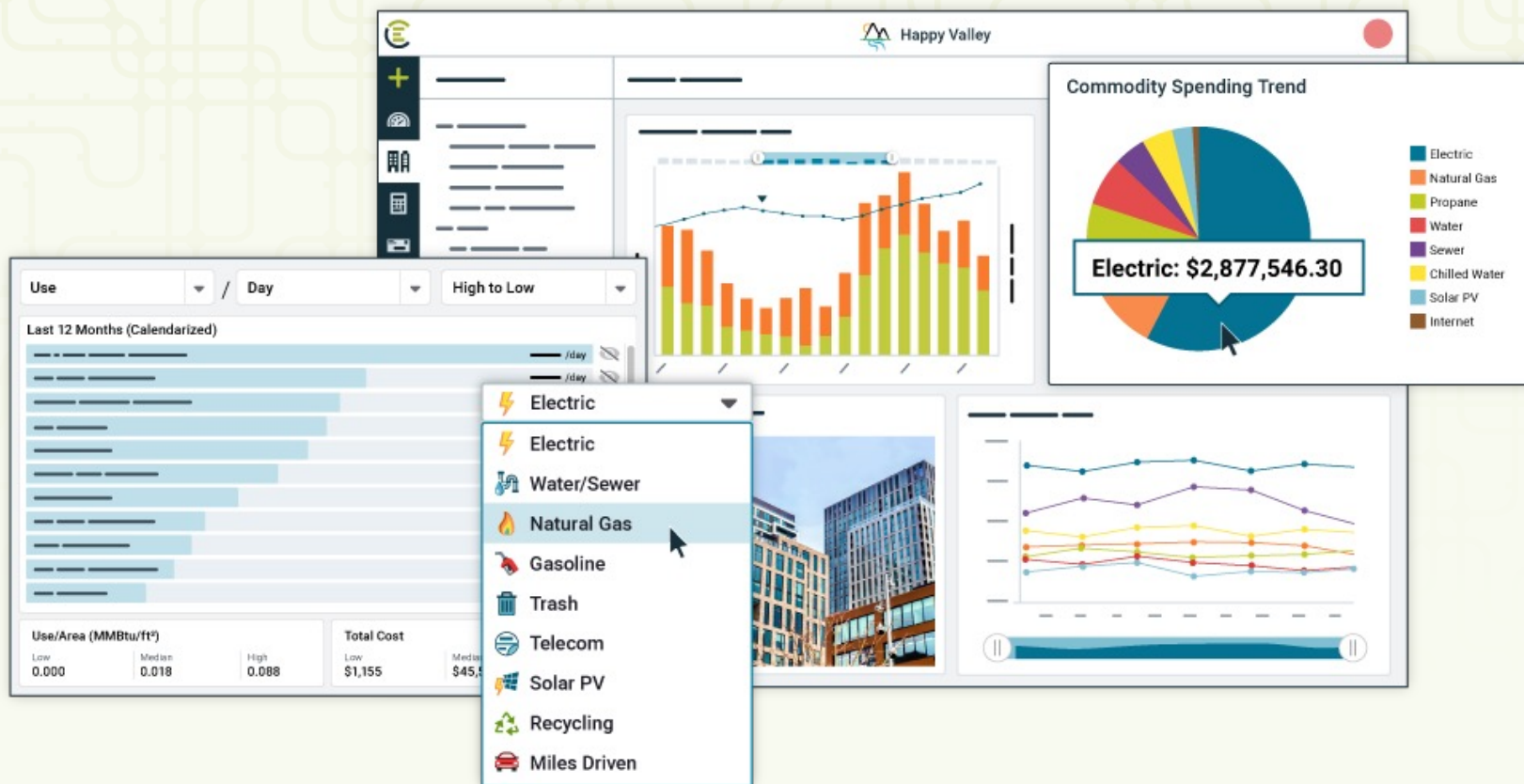
Text

equals

<p style="box-sizing: inherit; margin-top: 0px; margin-bottom: 1em; line-height: 1.5; color: rgb(26, 26, 35); font-family: Roboto, -apple-system, BlinkMacSystemFont, "Segoe UI", Oxygen, Ubuntu, "Fira Sans", "Droid Sans", "Helvetica Neue", sans-serif; font-size: 14px; font-style: normal; font-variant-ligatures: normal; font-variant-caps: normal; font-weight: 400; letter-spacing: normal; orphans: 2; text-align: left; text-indent: 0px; text-transform: none; white-space: normal; widows: 2; word-spacing: 0px; -webkit-text-stroke-width: 0px; background-color: "



# Wrap up



# Questions?

# Session Survey

[conferences.energycap.com/surveys](https://conferences.energycap.com/surveys)

