How can I present
my data?

CATALYSTA

Session Agenda

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

- PowerViews

- Reports
    - Quick access reports
    - Configured reports

- Dashboards
    - Public Dashboards

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.
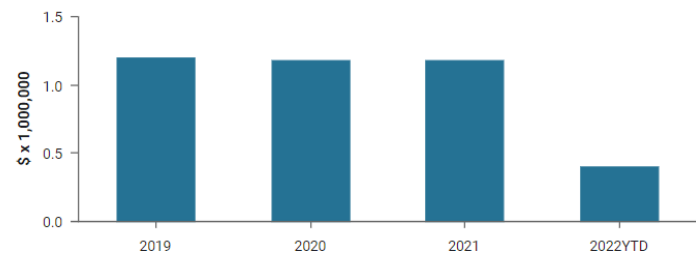
Calendarized

- 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.*
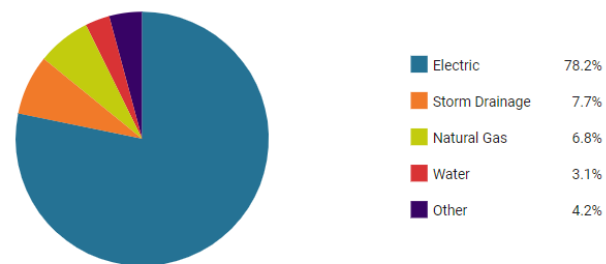
Normalized

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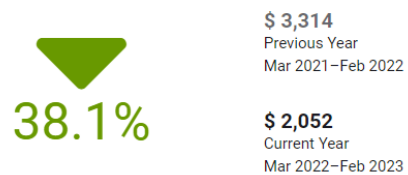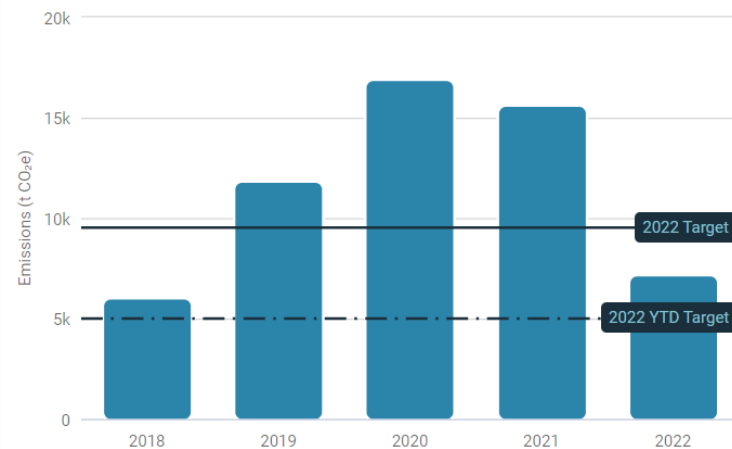
PowerViews
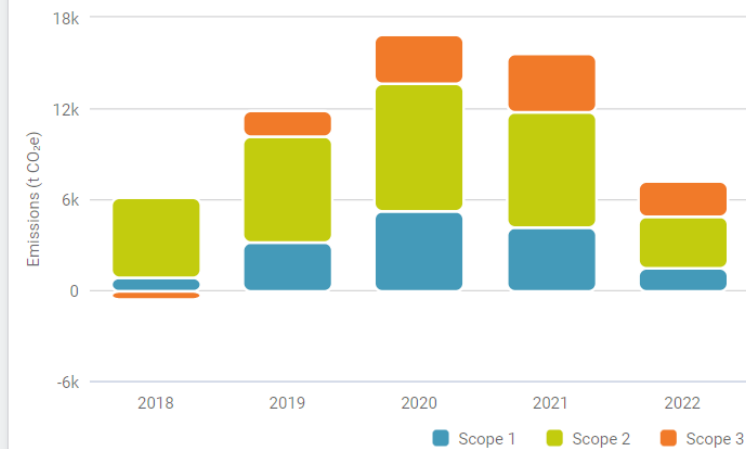
Reports

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

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.
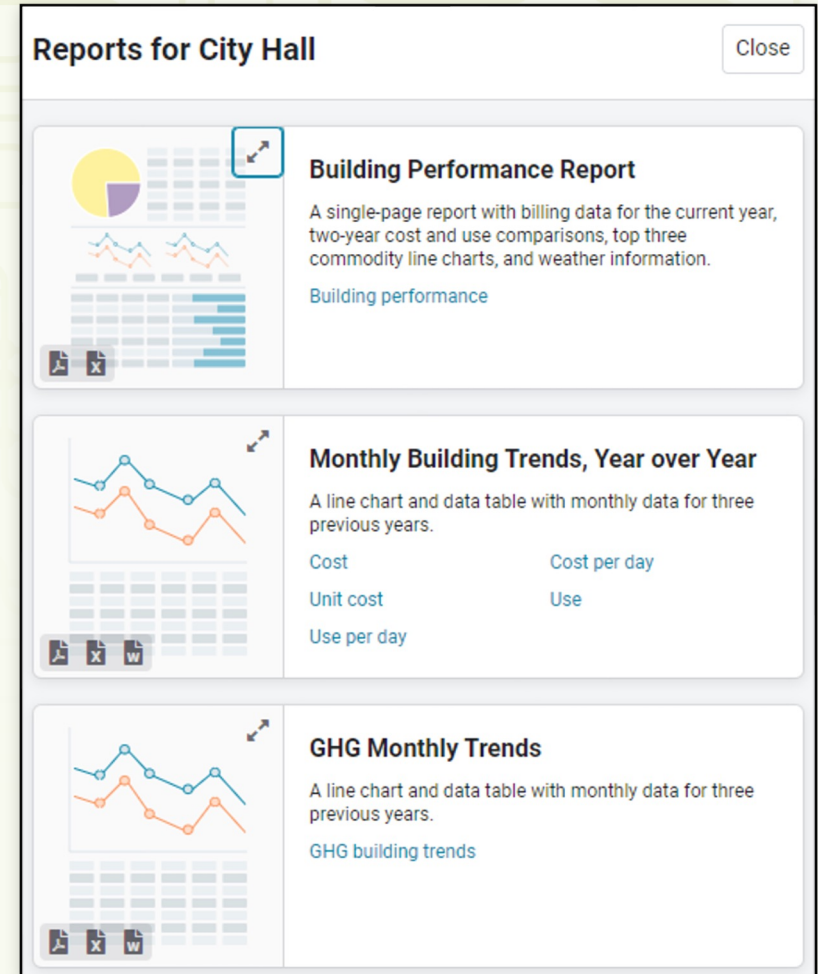
Quick Access Reports

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
Cancel | Save

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   Cancel   Back: Report Filters   Save

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.
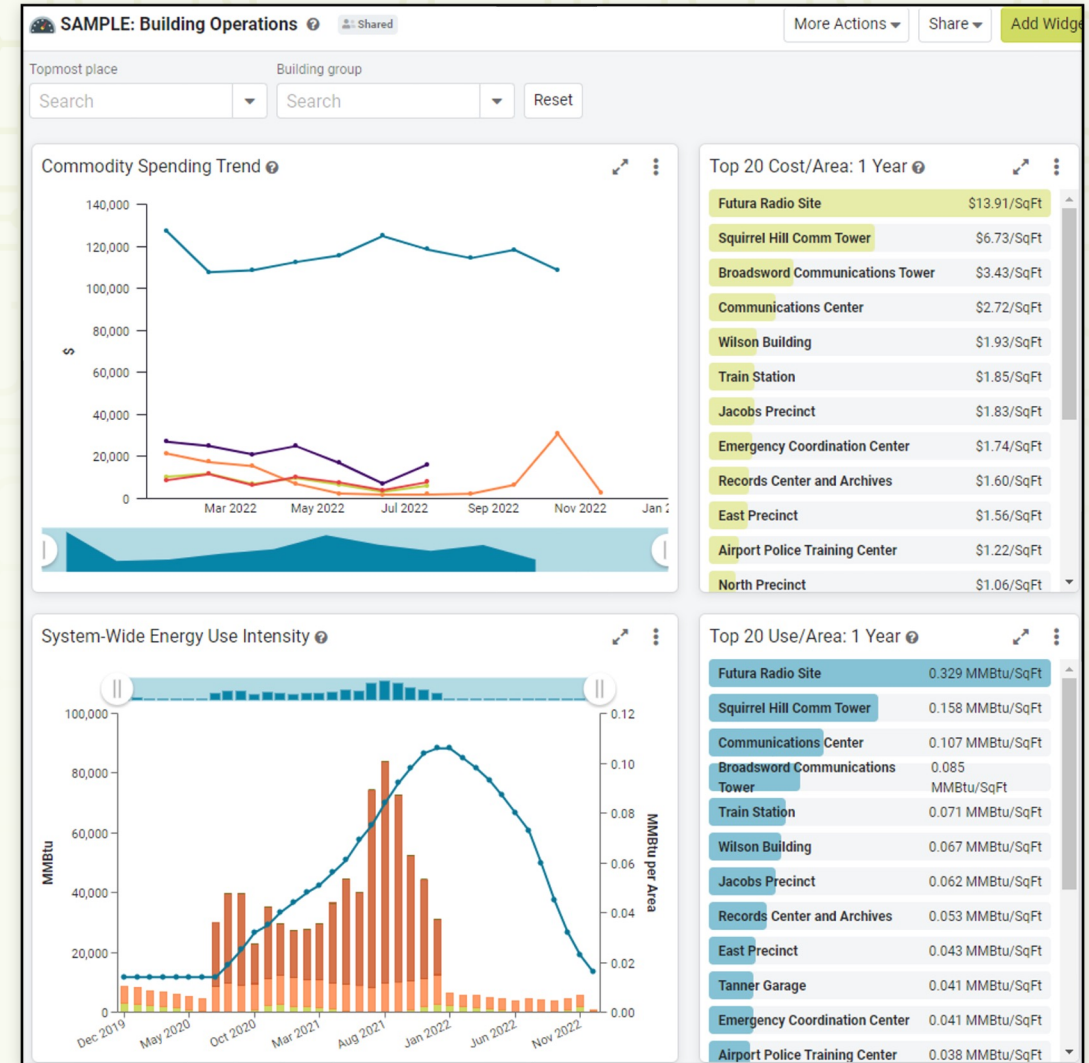
Dashboards

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

Cancel   Save

GLOBAL DASHBOARD FILTER ❓

- ⦿ Show global dashboard filter
- ◯ Set global dashboard filter to...
- ◯ Hide global dashboard filter

DASHBOARD INFORMATION

Show dashboard title and description   **Show**   Hide

LINKS ❓

Enable links to application   **Enable**   Disable

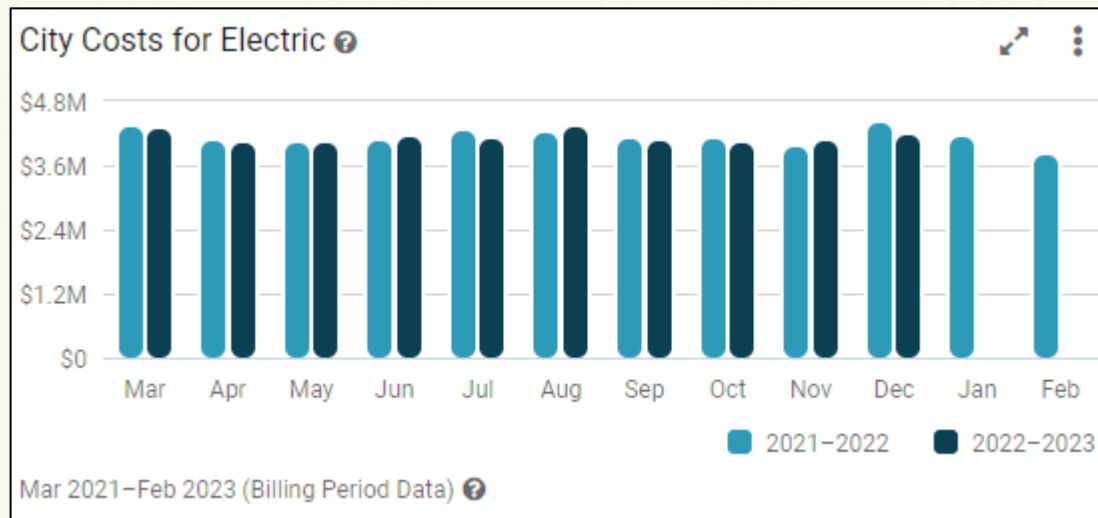# Dashboards

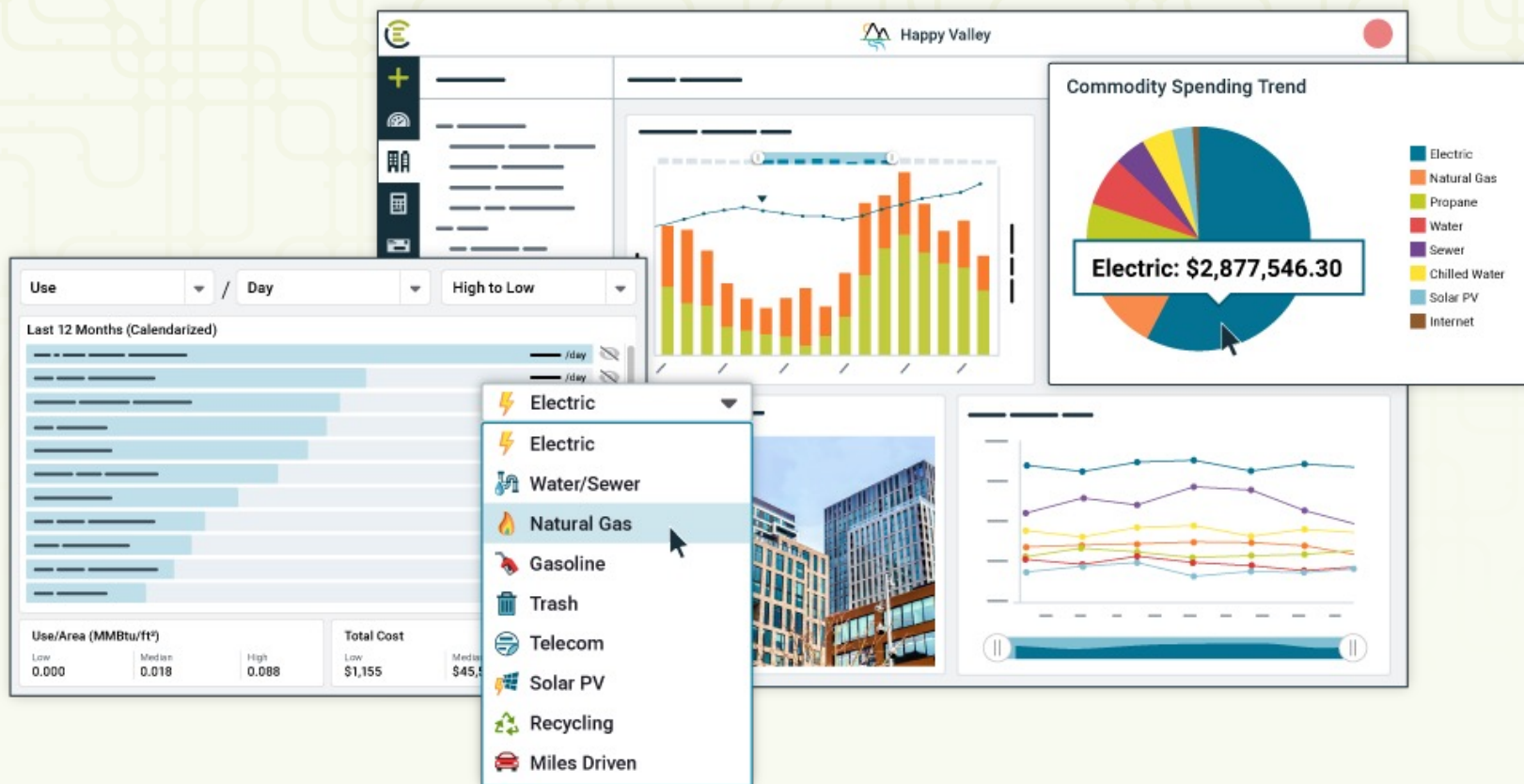Manage all your dashboards with **My Dashboards**.

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.

Wrap up

Questions?

Session Survey

conferences.energycap.com/surveys