

# How can I present my data?

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!

- 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

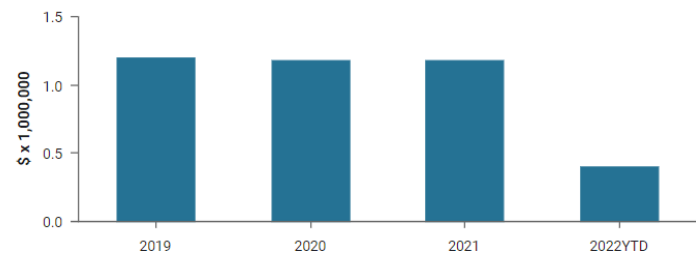
- Allocates use and cost to the month it occurred rather than the month it was billed. For year-over-year COST comparisons use calendarized data. *\*ENERGY STAR uses calendarized data.*

## Normalized

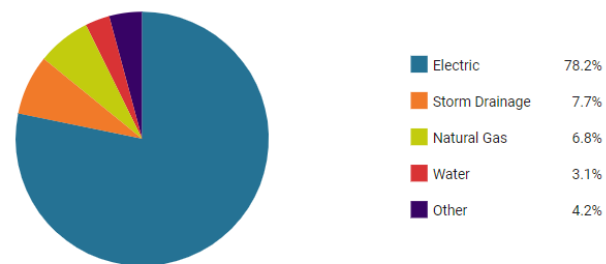
- Is best when comparing USE year-over-year because it removes weather as a variable.

# PowerViews

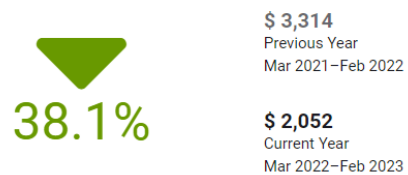
Total Cost Summary



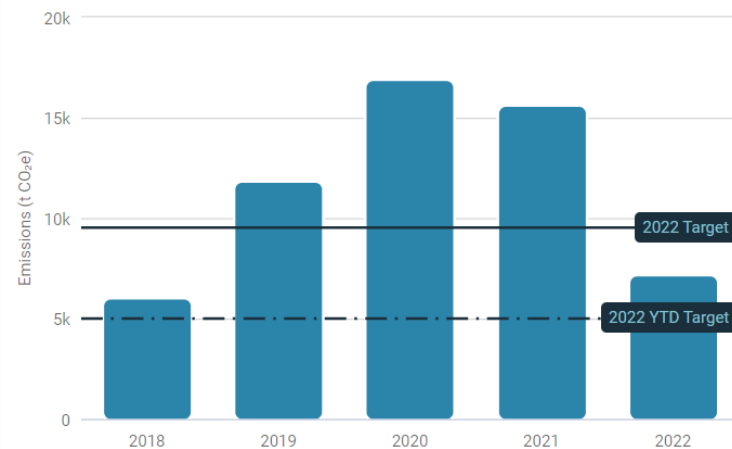
12-Month Commodity Cost



Daily Cost

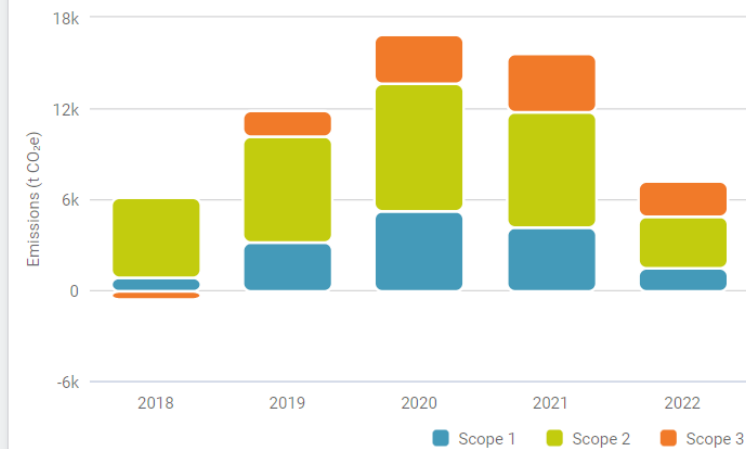


Carbon Footprint - Total Emissions



Fiscal Years 2018–2022 (Calendarized Data)

Carbon Footprint by Scope

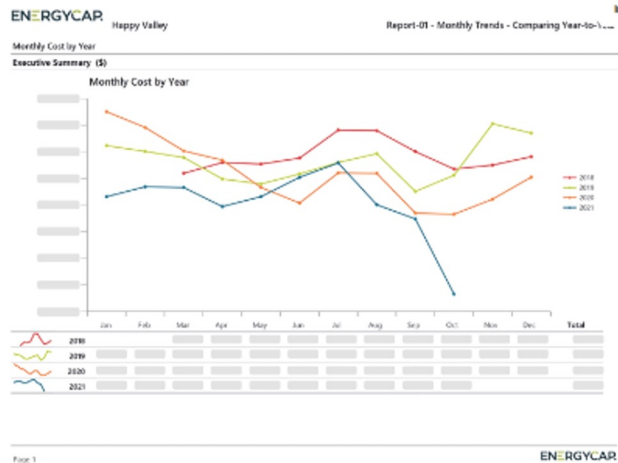


Fiscal Years 2018–2022 (Calendarized Data)

# 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.



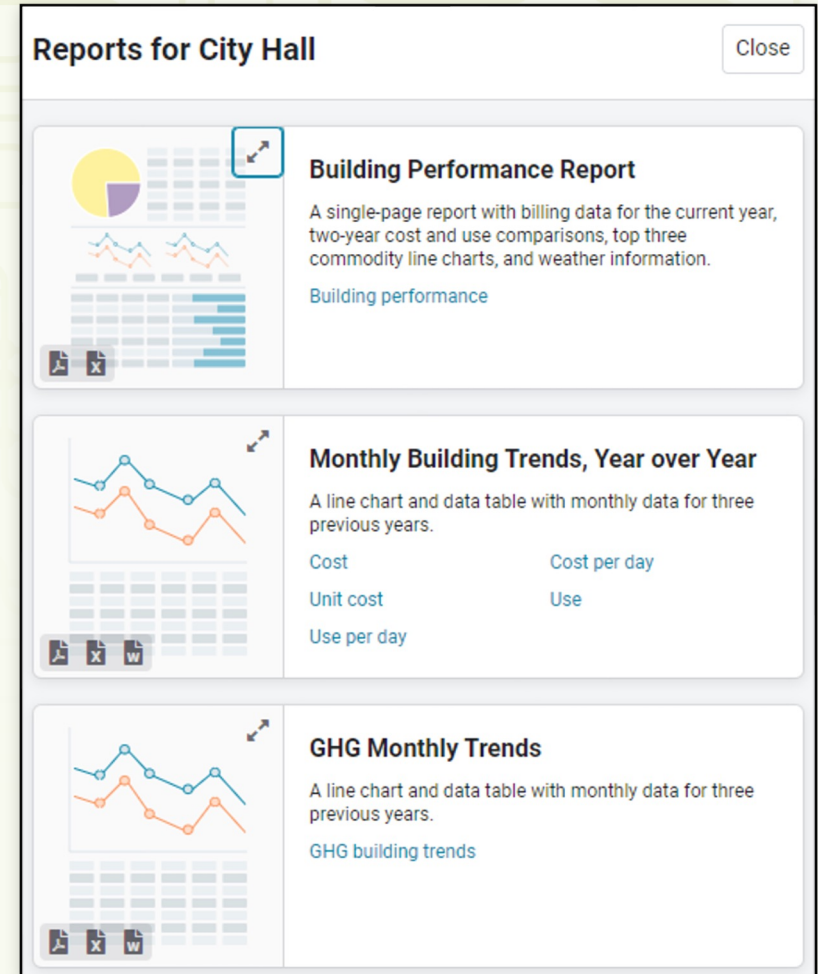
# Quick Access Reports

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

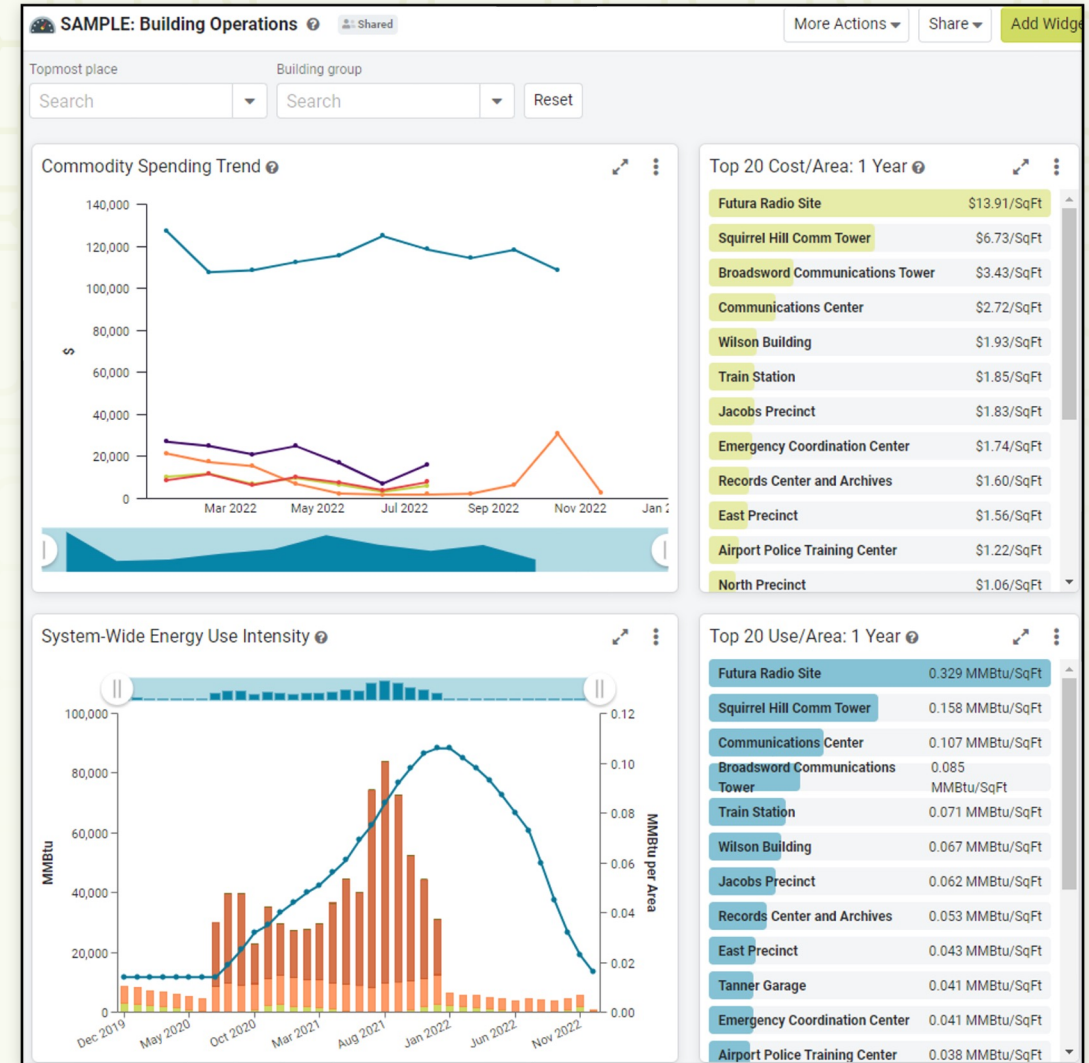
1st

☒ 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	   

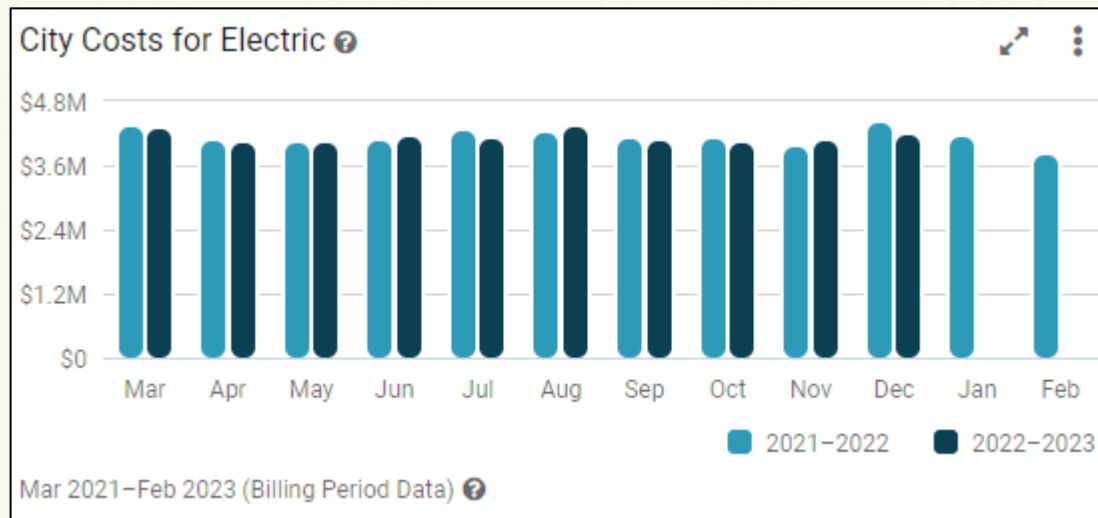
4 results



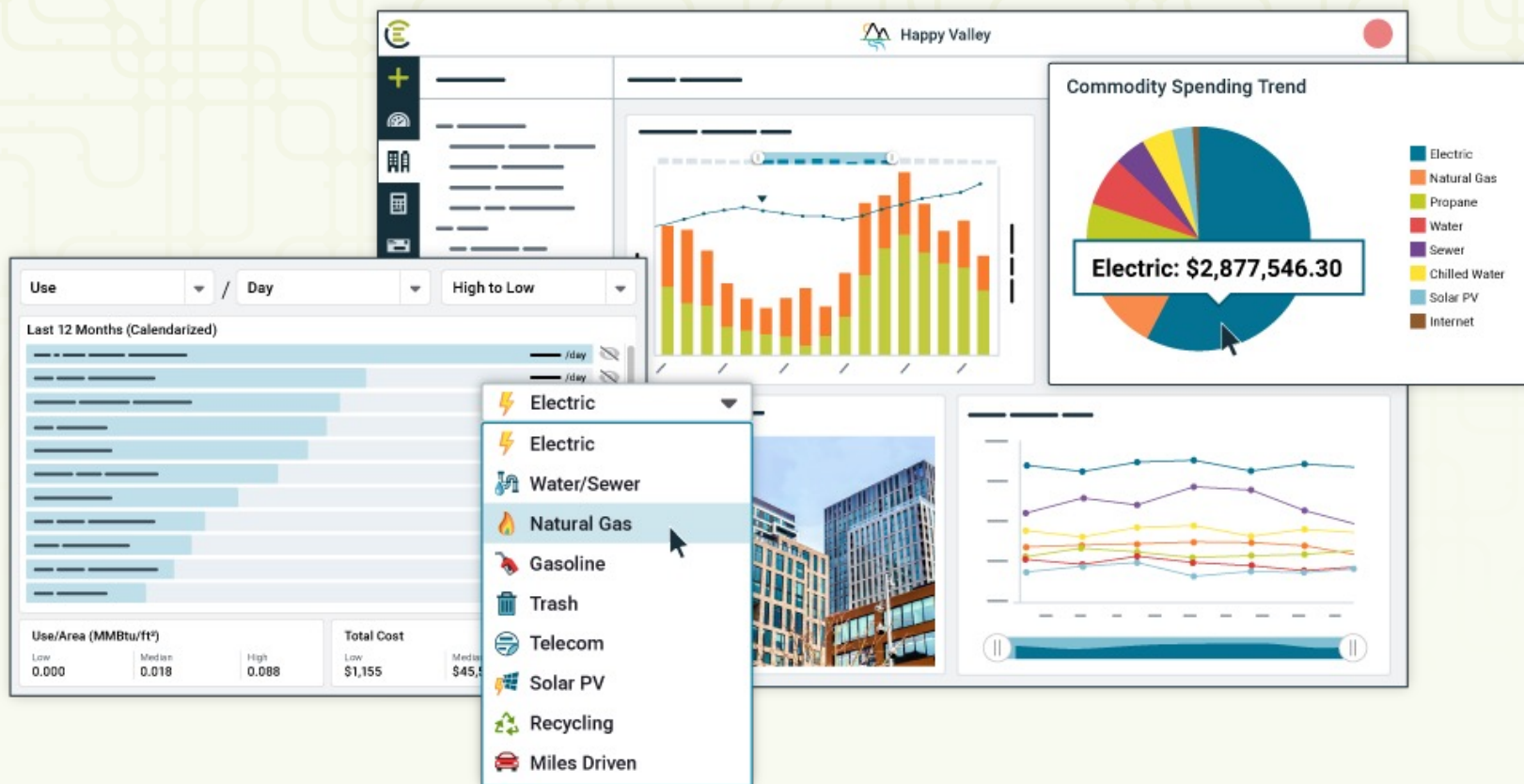
# Dashboards

## 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.



# Wrap up



# Questions?

# Session Survey

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

