

Solving problems with EnergyCAP Report Designer BI



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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!**

Solving problems with EnergyCAP Report Designer BI



- What is Report Designer BI?
- Options for connecting to your data
- Samples of using Report Designer BI



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What is 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

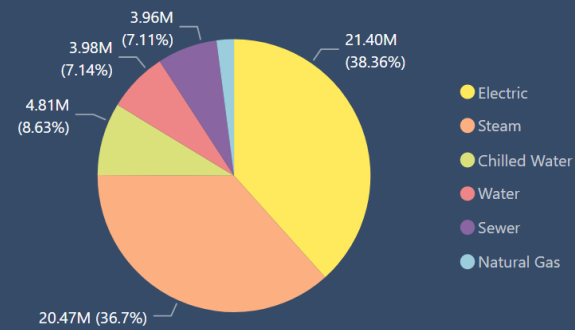
1/1/2020

12/31/2020

BACK

NEXT

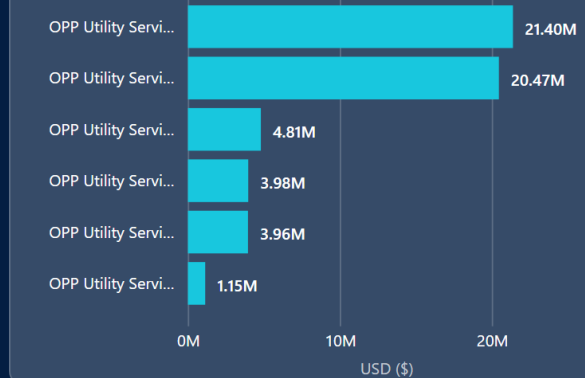
Cost by Commodity



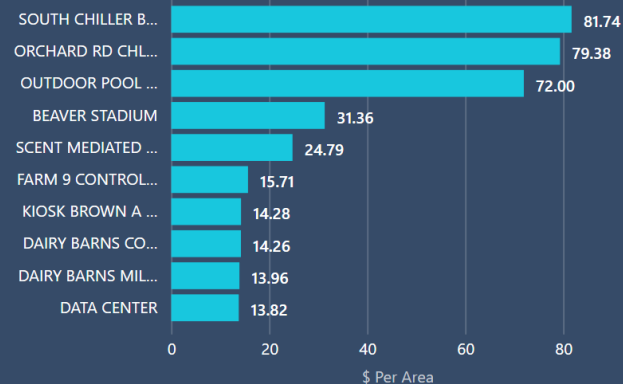
Monthly Cost Trend



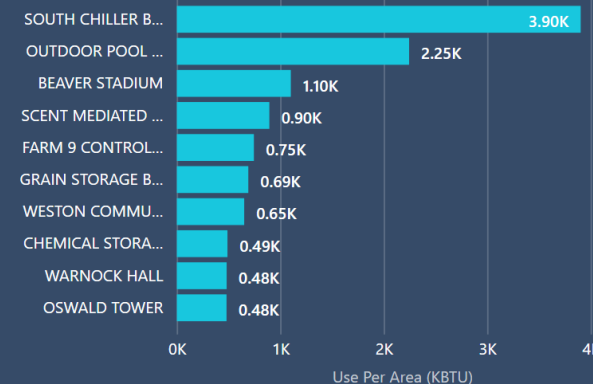
Top 10 Cost by Vendor



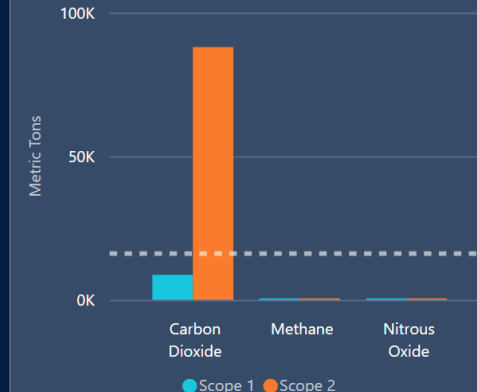
Top 10 Cost/Area by Place



Top 10 Use/Area by Place

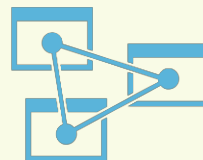


Carbon Footprint



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 - January 2023

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 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

CarbonHub data coming in the next few weeks!

Additional details available in the EnergyCAP Help Center

The screenshot shows the EnergyCAP Help Center interface. At the top, the browser address bar displays the URL: `helpcenter.energycap.com/um/Report_Designer/Report_Designer_BI_Ov.htm`. The page header includes the "ENERGYCAP | Help Center" logo on the left and "Help Center Home" with a search icon on the right. A purple banner below the header reads "UtilityManagement Help".

The left sidebar contains a navigation menu with the following items:

- overview
- > Use the Create button
- > Dashboards and maps
- > Buildings and Meters module
- > Accounts module
- > Bills module
- > Groups and Benchmarks
- > Chargebacks module
- > Interval data
- > Vendors and Rates module
- ▼ Reports
 - Reports overview
 - Report subscription and distribution
 - Share a report
 - > Reports library
 - > Report Guides
 - > Reports module menu
 - ▼ Report Designer
 - Report Designer BI overview**
 - Report Designer data dictionary
 - Report Designer BI examples

The main content area features a breadcrumb trail: [UtilityManagem...](#) > [Repo...](#) > [Report Desig...](#) > **Report Designer BI overview**. Below this is the section title "Report Designer BI overview" and a sub-header "Report Designer BI".

The "Report Designer BI" section contains two paragraphs:

Report Designer BI is an optional service that organizes and publishes your EnergyCAP energy and billing data for easy visualization and analysis with third-party tools 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 that easily integrates with your existing business intelligence (BI) tools and workflow. EnergyCAP utilizes Microsoft Analysis Services to provide your data in a standard format to easily connect with a variety of tools and systems—letting you focus on analysis instead of a complex data workflow.

Below this is the section title "Report Designer BI data model".

The "Report Designer BI data model" section contains two paragraphs:

The data model available with Report Designer BI includes your accounting, billing, facility, and sustainability data to make visualizing and analyzing data even easier.

EnergyCAP provides the most recent five full calendar years of billing data and the most recent 13 months of interval data.

Data types include:

The right sidebar, titled "In this Topic", lists the following links:

- Report Designer BI**
- Report Designer BI data model
- How is Report Designer BI different from the built-in dashboards and reports in EnergyCAP?
- Report Designer BI availability
- What's the difference between Report Designer BI and previous versions of Report Designer?
- Getting started
- Technical details
- Limitations - Azure GovCloud and Tableau Cloud
- How can I get extra help?
- Webinar

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 provides 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 easily integrates with your existing business intelligence (BI) tools and workflow. Your data is provided 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 platform

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:

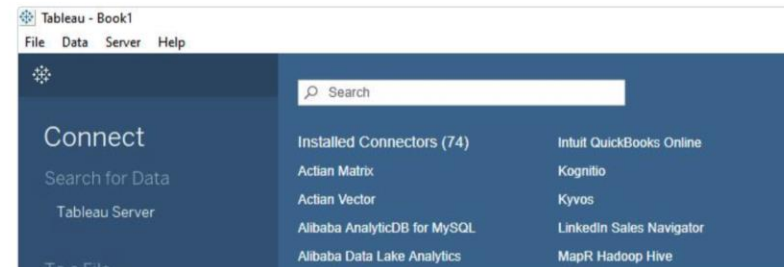
- Bills
- Bill line items
- Meter use/cost
- Building and organization use/cost
- Account use/cost
- Cost center use/cost
- Vendor use/cost
- GL subcode and accounting export information
- Greenhouse gas (GHG) emissions per building

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



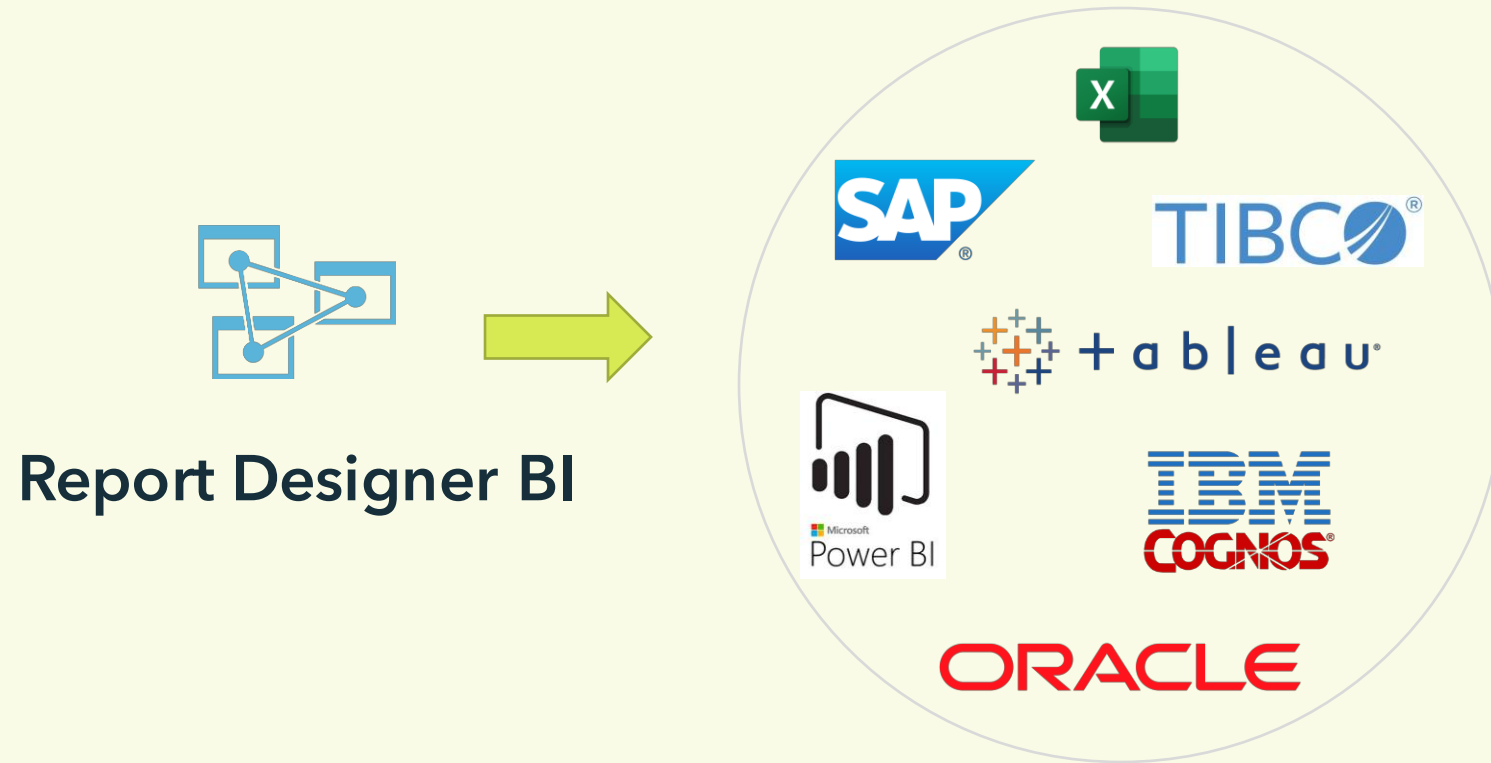
Help Resources for Report Designer BI



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Options for connecting to Report Designer BI

Connecting to Report Designer BI



Demo: Connecting from Excel and Power BI



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Samples of using Report Designer BI

Questions?



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Session survey