



AssetPlanner™

Energy & Sustainability

Quick Start Guide

Getting Started:

Web Link & Login

Web Link & Login

www.AssetPlanner.com

First enter your **e-mail address** and the **password** provided to you by Ameresco and then click **Login**.

AssetPlanner

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Asset Planner - Login

Please enter your Login Information:

User ID (Email):

Password:

Keep me logged in on this computer

[I forgot my password](#)

If you do not have an account and wish to access the Service Request page, click on the New User button.

GeoTrust
secured
website

Tip: If you ever forget your password you can click on the **"I forgot my password"** link. You will receive an e-mail with instructions on how to reset your password.

Upon logging in for the first time you will be asked to create a **new password** for your account.

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Your password has expired. Please verify existing and provide new Password below.

User ID (Email):

Current Password:

New Password:

Verify Password:

[I forgot my password](#)

If you do not have an account and wish to access the Service Request page, click on the New User button.

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secured
website

To begin our training session click on **Change Password** and then you will be asked to Accept the terms and conditions.

Navigation:

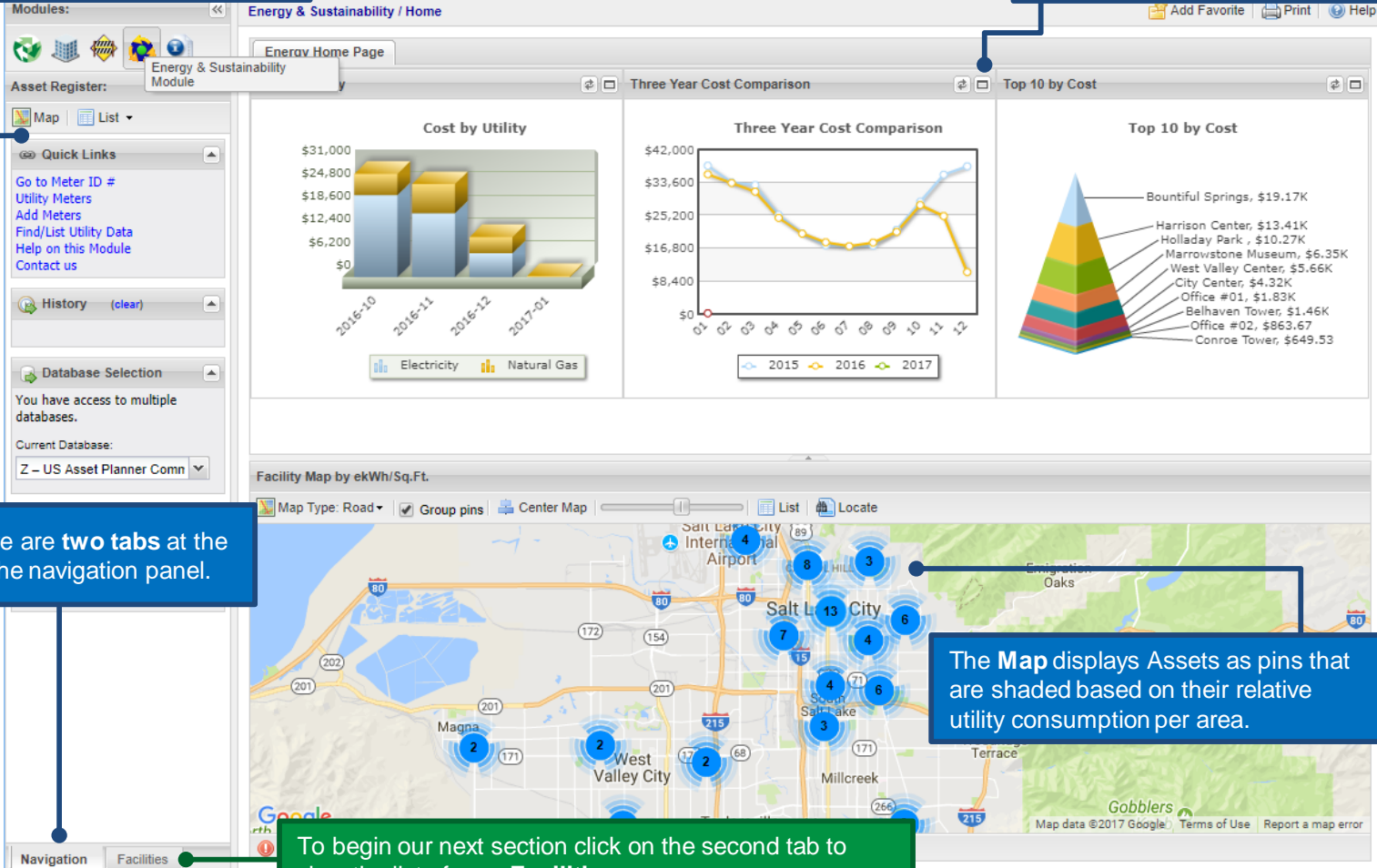
Screen Layout & Facility List

Home Screen Layout

Upon logging in you will be taken to the home screen which displays a navigation panel to the left, charts across the top and a map of your assets in the bottom section of the screen.

The **Navigation Panel** contains system messages, quick links and a history of last Facilities or Utility Meters viewed.

Charts are located across the top of the screen. Each chart can be expanded by clicking on the box in the corner.



Note: There are **two tabs** at the bottom of the navigation panel.

The **Map** displays Assets as pins that are shaded based on their relative utility consumption per area.

To begin our next section click on the second tab to view the list of your **Facilities**.

Navigation Tools

The **Module** selection panel allows you to switch between different parts of the software and indicates the module you are currently viewing.

The **Menu Bar** is where you will find common features such as Utility Tracking, Reports, Dashboards, Favorites, Preferences etc.

Z – US ASSET PLANNER COMMERCIAL

The screenshot displays the software interface with several key components:

- Menu Bar:** Located at the top, it includes options like Home, My Dashboard, Favorites, Utility Tracking, PM Assets, Reports, Tool Box, Configure, Preferences, and Admin.
- Module Selection Panel:** On the left, it shows a tree view of modules and asset registers, including Commercial Portfolios, Arts/Entertainment, Museum, Marrowstone Museum, Prince George Arts Centre, Theatre, Multifamily, Office, Private Health Care, Retail, and Sports/Fitness.
- Energy Home Page:** The main content area features three panels: 'Cost by Utility' (a 3D bar chart comparing Electricity and Natural Gas for 2016-10, 2016-11, and 2016-12), 'Three Year Cost Comparison' (a line graph comparing 2015 and 2016 costs from 01 to 12), and 'Top 10 by Cost' (a pyramid chart listing assets like Bountiful Springs, Harrison Center, and Holladay Park with their respective costs).
- Map View:** At the bottom, a map of Salt Lake City shows asset locations marked with blue circles and numbers. A search bar and navigation tabs (Navigation, Facilities) are visible at the bottom left.

The **Tree View** drop-down allows you to view the Asset list in different grouping configurations.

To begin our next section expand one of the grouping folders using the **[+]** sign.

Note: we have now switched to the **second tab** to view the Facility list.

Facility Tab

The second tab on the Navigation Panel will display a listing of your Facilities. This list is your primary navigation tool: click on a Facility or grouping on the left and the middle panels will update with specific information relating to your selection.

Note: when you click on a [+] sign to expand a **Grouping Folder** or **Asset** all related items will display below.

The **List** button will take you to a grid style listing of your **Assets** and details relating to each.

The screenshot displays a software interface for facility management. On the left is a navigation tree under 'Asset Register' with categories like 'Commercial Portfolios', 'Museum', 'Marrowstone Museum', etc. The main area shows three charts: 'Cost by Utility' (3D bar chart for Electricity and Natural Gas from 2016-10 to 2016-12), 'Three Year Cost Comparison' (line chart for 2015 and 2016 from 01 to 12), and 'Top 10 by Cost' (3D pyramid chart highlighting Marrowstone Museum at \$6.35K). At the bottom is a 'Facility Map by ekWh/Sq.Ft.' showing a map of Salt Lake City with a pin on Liberty Park. A search bar and 'Navigation'/'Facilities' tabs are at the bottom left.

To begin our next section double click on a **Facility** name.

Asset Details

Double clicking on an Asset name displays a form style view with details & tabs. **Note:** You can also **right click** and select “show details” for a pop-up style form.

Tabs across the top of the form allow you to view additional details relating to the Facility.

Click **Save** to submit changes to facility information.

Links on the general tab allow you to quickly navigate to data linked to the Asset.

Z – US ASSET PLANNER

The screenshot displays the 'Z – US ASSET PLANNER' interface. On the left is a navigation tree under 'Asset Register' showing a hierarchy: Commercial Portfolios > Arts/Entertainment (6) > Museum (4) > Marrowstone Museum (2) > Marrowstone Museum. The main window is titled 'Energy & Sustainability / Marrowstone Museum' and shows a form for 'Marrowstone Museum'. The form has a 'Save' button and a tabbed interface with tabs for 'General', 'Details', 'Condition Summary', 'Tenant', 'Sections', 'Contact', 'Custom Details', 'Building Details', 'History', 'Notes', and 'Tasks (0)'. The 'General' tab is active, showing fields for Facility, Description, Asset Network, Function, Commercial Portfolio, Asset Type, Site Name, Facility Code, Unique Building ID, Bar/QR Code, Floor List, Address, City, Country, Province/State, Postal/Zip, and Status. A photo of the Marrowstone Museum is displayed on the right. Below the photo, a summary states 'Facility consists of' followed by a list of linked data: 61 Element(s), 1 Audits(s), 1 Project(s), 3 Asset(s), 2 Meter(s), and 0 Service Request(s). At the bottom right, there are dropdown menus for 'Level3:' and 'Level4:'. A search bar and 'Navigation'/'Facilities' buttons are at the bottom left.

Review & Modify: Meter Details & Utility Data

List Utility Meters

To list your utility meters select **List Utility Meters** under the **Utility Tracking** drop-down in the Menu Bar.

— US ASSET PLANNER COMMERCIAL

The screenshot displays the 'US ASSET PLANNER COMMERCIAL' interface. The top menu bar includes 'Home', 'My Dashboard', 'Favorites', 'Utility Tracking', 'PM Assets', 'Reports', 'Tool Box', 'Configure', 'Preferences', and 'Admin'. The 'Utility Tracking' menu is open, showing options: 'Go to Meter ID', 'Add Utility Meter', 'Import Utility Meter Data', 'Import Interval Meter Data', 'List Utility Meters', 'List/Search Meter Data', and 'Energy Budget'. A green arrow points from the 'List Utility Meters' option in the menu to the 'List' button in the 'Asset Register' sidebar. The 'Asset Register' sidebar shows a tree view of 'Commercial Portfolios' with sub-categories like 'Arts/Entertainment (6)', 'Museum (4)', 'Theatre (2)', 'Multifamily (6)', 'Office (26)', 'Private Health Care (12)', 'Retail (34)', and 'Sports/Fitness (6)'. The main window shows a 'Custom Details' form with various filters: 'Meter Type', 'Meter ID', 'Metering Type' (set to 'Standard'), 'Meter Name', 'Commercial Portfolio', 'Asset Type', 'Site Name', 'Asset Class', 'Facility Function', 'Facility', 'Status' (set to 'Active'), 'Meter Status', 'Utility Provider', 'Account Number', 'Budget Number', 'Base Year Data Status', 'Regression Status', 'Affected By', and 'Description Contains'. A blue callout box points to the 'Facility' filter with the text: 'Filters allow you to set criteria and narrow down the meter listing. Note: If you leave the filters blank you will list all utility meters.' Another blue callout box points to the 'Find' button at the bottom of the form with the text: 'Once your done using the filters click the Find button.' The bottom of the interface has a search bar and buttons for 'Navigation', 'Facilities', 'Find', 'Add', 'Back', and 'Help'.

List Utility Meters

The screenshot displays the AssetPlanner interface for 'Z - US ASSET PLANNER COMMERCIAL'. The main window shows a table of utility meters with the following data:

ID	Meter Type	Name	Meter Status	Facility	Utility Provider
16	Electricity	301 Wakara Way - Marrowstone Museum	Active	Marrowstone Museum	Utah Hydro
27	Natural Gas	301 Wakara Way - Marrowstone Museum	Active	Marrowstone Museum	Fortis Gas

Callout 1 (Blue box): You can Export this table to an excel spreadsheet. This callout points to the 'Export' button in the table's toolbar.

Callout 2 (Green box): Customize allows you to add or remove columns of information from your meter listing. This callout points to the 'Customize' button in the table's toolbar.

Callout 3 (Blue box): You can edit the meter detail information for multiple meters by selecting the meters you want to edit and then selecting the Modify button. This callout points to the 'Modify' button in the table's toolbar.

List Utility Meters

AssetPlanner Z – US ASSET PLANNER COMMERCIAL

Home | My Dashboard | Favorites | Utility Tracking | PM Assets | Reports | Tool Box | Configure | Preferences | Admin | Help

Modules: Energy & Sustainability / Utility Meters

Asset Register: Portfolio, Type, Site Name

- Commercial Portfolios (6)
 - Arts/Entertainment (6)
 - Museum (4)
 - Marrowstone Museum (2)
 - Marrowstone Museum
 - Marrowstone Museum
 - Prince George Arts Centre
 - Theatre (2)
 - Multifamily (6)
 - Office (26)
 - Private Health Care (12)
 - Retail (34)
 - Sports/Fitness (6)

Customize Columns

Select the order and the columns to be displayed for this page.

Columns to Display

- ID
- Meter Type
- Name
- Meter Status
- Facility
- Utility Provider

Columns Available

- Account Number
- Affected By
- Area Served
- Asset Type
- Balance Point
- Base End Date
- Base Start Date
- Block
- Budget Number
- Classification1
- Commercial Portfolio
- Created
- Description
- Facility Size
- Other Cost1

Company Wide Defaults: Save | Reset to Default
Personal Defaults: Save | Reset to Default | Cancel

Note: company defaults for this form, are only used for users that have not configured any personal defaults. If you wish all users to use the new company defaults for this form you must check the box to reset their settings.
 Reset all users settings for this form

Callouts:

- To add a new column to your table select the heading from the list of Columns Available.
- Then click the Add button.
- To change the order of which columns appear in your table use the Arrow buttons.
- Once you have finished adjusting the columns you can Save these column settings as either your personal default or the company wide default.

List Utility Meters

The screenshot displays the AssetPlanner interface. The top navigation bar includes 'Home', 'My Dashboard', 'Favorites', 'Utility Tracking', 'PM Assets', 'Reports', 'Tool Box', 'Configure', 'Preferences', and 'Admin'. The main header reads 'Z – US ASSET PLANNER COMMERCIAL'. The left sidebar shows a tree view of 'Commercial Portfolios' with categories like Arts/Entertainment, Museum, Theatre, Multifamily, Office, Private Health Care, Retail, and Sports/Fitness. The main content area is titled 'Energy & Sustainability / Utility Meters' and shows a table of utility meters for Marrowstone Museum. A blue notification bar at the top of the table area states 'Column settings have been saved.' Below the table, a green callout box points to the ID '16' in the first row, containing the text: 'To begin our next section use the blue Hyperlink to navigate to the Meter Page.'

AssetPlanner

Z – US ASSET PLANNER COMMERCIAL

Home | My Dashboard | Favorites | Utility Tracking | PM Assets | Reports | Tool Box | Configure | Preferences | Admin

Modules: Energy & Sustainability / Utility Meters

Asset Register: Map | List

Portfolio, Type, Site Name

- Commercial Portfolios
 - Arts/Entertainment (6)
 - Museum (4)
 - Marrowstone Museum (2)
 - Marrowstone Museum
 - Marrowstone Museum
 - Prince George Arts Centre
 - Theatre (2)
 - Multifamily (6)
 - Office (26)
 - Private Health Care (12)
 - Retail (34)
 - Sports/Fitness (6)

Utility Meters for Marrowstone Museum and where Facility Status = Active

Utility Meters (Add a new Utility Meter, Back to Find or New Search)

Select all | Unselect | Select between | Export | Modify | Customize

ID	Meter Type	Name ^	Meter Status	Facility	Utility Provider	Account Number
16	Electricity	301 Wakara Way - Marrowstone Museum	Active	Marrowstone Museum	Utah Hydro	100231
27	Natural Gas	301 Wakara Way - Marrowstone Museum	Active	Marrowstone Museum	Fortis Gas	622934

Search...

Navigation | Facilities

Column settings have been saved.

To begin our next section use the blue Hyperlink to navigate to the Meter Page.

Utility Meter Page



Z – US ASSET PLANNER COMMERCIAL

Home | My Dashboard | Favorites | Utility Tracking | PM Assets | Reports | Tool Box | Configure | Preferences | Admin

Energy & Sustainability / 301 Wakara Way - Marrowstone Museum

301 Wakara Way - Marrowstone Museum

Meter Details (MeterID: 16)

Facility: Marrowstone Museum
Tenant:
Name: 301 Wakara Way - Marrowstone Museum
Utility Provider: Utah Hydro
Account Number:
Description:

Status
Metering Type: Standard
Meter Type: Electricity
Unit of Measure: kWh
Status: Active

Electricity (kWh) (Click Add to insert a new reading use TAB to move to next cell. Data is saved as you type)

Starting Date	Ending Date	Consumptio...	Cons. Unit Cost	Cons. Total Cost	Demand (kW)	Dem. Tot. Cost	Basic Char... (\$)	Rate Rider (\$)	Other Charges (\$)	Tax1	Total
2016-01-05	2016-02-02	16,560	\$0.0874	\$1,447.41	46	\$48.40	\$5.24	\$73.46	-\$31.71	\$77.14	\$1,727.94
2016-02-03	2016-03-03	18,576	\$0.08849	\$1,643.81	62	\$118.80	\$5.42	\$86.46	-\$38.92	\$90.78	\$2,033.44
2016-03-04	2016-04-05	17,280	\$0.08747	\$1,511.39	41	\$26.56	\$5.99	\$75.63	-\$31.36	\$79.41	\$1,778.80
2016-04-06	2016-05-03	13,104	\$0.09839	\$1,289.31	39	\$18.30	\$5.26	\$64.27	-\$27.50	\$67.48	\$1,511.59
2016-05-04	2016-06-02	12,960	\$0.10035	\$1,300.51	39	\$18.30	\$5.63	\$64.84	-\$27.66	\$68.08	\$1,525.01
2016-06-03	2016-07-04	13,536	\$0.09893	\$1,339.17	39	\$18.30	\$6.01	\$68.10	-\$28.26	\$71.50	\$1,601.62
2016-07-05	2016-08-03	14,976	\$0.09989	\$1,495.97	46	\$50.34	\$5.63	\$75.98	-\$32.48	\$79.77	\$1,786.89
2016-08-04	2016-09-01	12,240	\$0.10162	\$1,243.85	35		\$5.45	\$62.40	-\$25.74	\$65.52	\$1,467.68
2016-09-02	2016-10-03	13,968	\$0.09911	\$1,384.40	39	\$18.30	\$6.01	\$68.99	-\$28.93	\$72.44	\$1,622.63
2016-10-04	2016-11-02	15,408	\$0.09657	\$1,487.98	40	\$22.88	\$5.63	\$74.29	-\$30.74	\$78.00	\$1,747.24
2016-11-03	2016-12-02	16,848	\$0.0943	\$1,588.74	46	\$50.34	\$5.63	\$80.54	-\$33.87	\$84.57	\$1,894.35

After adjusting any meter detail information you will need to use the **Save** button to keep these changes.

Meter Details including Facility, Name, Utility Provider, Account Number, Meter Type and Unit of Measure for each utility meter.

Utility Providers can be added as Service Providers under the **Configure** drop-down in the main menu.

The **Columns** drop-down allow you to show or hide different columns of data. You can re-order the columns in this table by clicking and dragging them.

Use the **Add** button to create a new meter reading.

Meter reading data can be edited by double-clicking on a cell.

Utility Meter Page – Advanced Settings

Other Costs and Values can be customized for each meter allowing you to capture specific costs or values from utility invoices.

Emissions Factors are used for Carbon Footprint reports.

The **Base Year** is allowed to directly compare the utility data from the year specified with subsequent years.

The **Weather Station** is automatically populated based on the location of the facility related to the meter but can be adjusted if needed.

Regression Analysis uses a model to normalize utility consumption and costs for weather. These settings can be configured against each meter individually or globally under the **Company Settings**.

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301 Wakara Way - Marrowstone Museum

Meter | **Advanced Settings** | Charts | Attachments | Activity

*Custom Fields

Other Cost Names:	PF Surcharge (\$)	Basic Charge (\$)	Rate Rider (\$)
Other Charges (\$)			

Use the yearly emission factor values if specified on the Utility Details tab of the Service Provider form
 Use the CO2 value specified below:
tonnes CO2/GJ: 0.00694440

Other
Base Year: Optional, specific year for non regression comparison reports.
Base Year Status: Base Year (2013) data OK
Include in Budget?: Yes
26,215 Sq.Ft. (If specified overrides Facility Size in reports)

If specified overrides the default value which is populated in Export Column D

Weather Data
Weather Station: TOOELE

*Regression Analysis

Affected by: Heating Degree Days

Base Load Start Date: 2013-01-01

Base Load End Date: 2013-12-31

Balance Point Temp (°F): 64.4

Confidence Interval: 0.88

Base Load: 16011.0478

CoefCDD:

CoefHDD: 10.7209

Months Sampled: 12

Analyze Now

Result:OK

*Regression Analysis applies to those utilities which are affected by weather (heating or cooling degree days). By default the most consistent year of data (highest confidence interval) will be used to calculate the base load and coefficients. To specify a different base year period set the Start and End dates and press Analyze Now button.

Regression Analysis Formula: $Y = B + B1 \times X$, where Y = consumption, B = base load, B1 = HDD or CDD coefficient and X = HDD or CDD.

Tips:
- A higher Confidence Interval indicates a more accurate prediction.
- See Charts tab and select from Show menu Modeling folder for Regression reports.

Cached Data
Some normalized data is cached for reporting speed along with related Weather data. [Click here to rebuild the cache.](#)

Import Utility Meter Data

Under **Utility Tracking** there is an option to **Import Utility Meter Data**

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Download the excel utility data **Import Template**.

Energy & Sustainability / Import Utility Meter Data

Import

This import page is for standard utility meters. Your meters must already be defined in Asset Planner and the Meter ID value must be supplied in the first column of the import file for each reading. You may import readings for multiple meters in one upload, each reading is associated with the correct Meter using the Meter ID field as noted above. To import meter readings, please download and populate this **Import Template**.

Then use the **Browse** button to upload your excel file (in **xlsx, xls or csv** format) and press **Test** button to validate.

Browse for the saved import file on your computer.

Import file:

Browse...

Test File

Import

Test your import file, if there are no errors use the **Import** button to upload this data.

Results

Test and Import results will be shown here

	A	B	C	D	E	F	G
1	Meter ID	Starting Date	Ending Date	Comment	Consumption	Cons. Unit Cost	Cons. Total Cost
2	Line 1 above must contain the column names and lines starting with # are skipped.						
3	Important: Meter ID (as shown on Meter page in FAME), Starting Date, Ending Date and Cons. Total Cost are mandatory.						
4	Date format must be an Excel Formatted Date cell or ISO format: YYYY-MM-DD or Canadian Format: DD/MM/YYYY						
5	Example import record shown below						
6	1	2017-10-01	2017-10-31		143		\$14.30
7	2	2017-10-01	2017-10-31		256		\$25.60

The **Meter ID** is the unique number that AssetPlanner assigns to each meter as they are created.

Fill out the mandatory data in the excel **Import Template** including Meter ID, Start & End Date, Consumption and Cons. Total Cost. The other fields are optional then save the import template.

Reporting:

Data Exports & Reports

List/Search Utility Meter Data

Use **List/Search Meter Data** to view a table of utility data for all or some of your meters.

The screenshot shows the 'List/Search Utility Meter Data' interface. The top navigation bar includes 'Home', 'My Dashboard', 'Favorites', 'Utility Tracking', 'PM Assets', 'Reports', 'Tool Box', 'Configure', 'Preferences', and 'Admin'. The main content area is titled 'Energy & Sustainability / Utility Data'. A dropdown menu is open, showing options: 'Go to Meter ID', 'Add Utility Meter', 'Import Utility Meter Data', 'Import Interval Meter Data', 'List Utility Meters', 'List/Search Meter Data', and 'Energy Budget'. The 'List/Search Meter Data' option is selected. Below the menu, there are various filter fields: 'Meter Type', 'Meter ID', 'List Format' (set to 'Meter Readings as Entered'), 'Commercial Portfolio', 'Asset Type', 'Site Name', 'Asset Class', 'Facility Function', 'Facility', 'Status' (set to 'Active'), 'Meter Status', 'Utility Provider', 'Data Comment Contains', 'Account Number', and 'Budget Number'. A 'Date Range' dropdown is set to 'Range...', with 'Starting Date' and 'Ending Date' fields below it. At the bottom right, there are 'Find', 'Back', and 'Help' buttons.

List Format allows you to display the data as it was entered or extrapolated to monthly, quarterly or yearly calendar periods.

The **Date Range** is a key filter when listing utility data.

After the filters have been selected, to begin the next section click **Find**.

List/Search Utility Meter Data

Column headers can be clicked on to sort data.

You can delete multiple meter readings from this table by selecting readings and then using the **Delete** button.

Customize allows you to add or remove columns of data or re-order the columns in your data table.

You can **Export** this utility data to an excel spreadsheet.

Utility Meter Readings and where Facility Status = Active on or after 2016-01-01

MeterID	Facility	Meter Type	Start Date	End Date	Consumption Units	Consumption Cost	Demand Cost	Tax1	Total Cost
9	Belhaven Tower	Electricity	2015-11-04	2016-01-04	11520.00 kWh	\$1,236.10		\$65.48	\$1,466.81
9	Belhaven Tower	Electricity	2016-01-05	2016-03-03	11584.00 kWh	\$1,242.96			
9	Belhaven Tower	Electricity	2016-03-04	2016-05-03	10688.00 kWh	\$1,171.86			
9	Belhaven Tower	Electricity	2016-05-04	2016-07-04	10816.00 kWh	\$1,207.06			
9	Belhaven Tower	Electricity	2016-07-05	2016-09-01	11328.00 kWh	\$1,264.21			
9	Belhaven Tower	Electricity	2016-09-02	2016-11-02	11712.00 kWh	\$1,307.06			
10	Bountiful Springs	Electricity	2015-12-12	2016-01-13	71040.00 kWh	\$4,072.43	\$784.52	\$69.23	\$1,550.80
10	Bountiful Springs	Electricity	2016-01-14	2016-02-12	70752.00 kWh	\$4,370.54	\$868.92	\$255.30	\$5,718.77
10	Bountiful Springs	Electricity	2016-02-13	2016-03-14	74304.00 kWh	\$4,889.18	\$818.28	\$275.35	\$6,167.97
10	Bountiful Springs	Electricity	2016-03-15	2016-04-14	48672.00 kWh	\$3,310.22	\$772.89	\$214.66	\$4,808.44
10	Bountiful Springs	Electricity	2016-04-15	2016-05-12	16992.00 kWh	\$1,378.68	\$128.13	\$79.38	\$1,778.19
10	Bountiful Springs	Electricity	2016-05-13	2016-06-13	19392.00 kWh	\$1,829.68	\$109.82	\$102.14	\$2,287.91
10	Bountiful Springs	Electricity	2016-06-14	2016-07-13	17472.00 kWh	\$1,711.22	\$64.06	\$93.50	\$2,094.36
10	Bountiful Springs	Electricity	2016-07-14	2016-08-12	17760.00 kWh	\$1,637.12	\$73.22	\$90.09	\$2,017.98
10	Bountiful Springs	Electricity	2016-08-13	2016-09-13	32064.00 kWh	\$2,275.23	\$710.54	\$157.07	\$3,518.34
10	Bountiful Springs	Electricity	2016-09-14	2016-10-13	65472.00 kWh	\$4,582.30	\$771.97	\$281.39	\$6,303.23
10	Bountiful Springs	Electricity	2016-10-14	2016-11-14	71424.00 kWh	\$4,454.78	\$842.18	\$278.41	\$6,236.30
10	Bountiful Springs	Electricity	2016-11-15	2016-12-13	61824.00 kWh	\$3,813.12	\$807.07	\$242.85	\$5,439.75
11	Conroe Tower	Electricity	2015-12-11	2016-02-11	9152.00 kWh	\$982.01		\$52.15	\$1,168.23
11	Conroe Tower	Electricity	2016-02-12	2016-04-13	7232.00 kWh	\$782.60		\$41.68	\$933.62
11	Conroe Tower	Electricity	2016-04-14	2016-06-10	6912.00 kWh	\$771.38		\$41.07	\$919.95
11	Conroe Tower	Electricity	2016-06-11	2016-08-11	7104.00 kWh	\$792.81		\$42.23	\$946.03
11	Conroe Tower	Electricity	2016-08-12	2016-10-12	7296.00 kWh	\$814.23		\$43.36	\$971.23
12	Office #01	Electricity	2015-12-30	2016-01-27	4285.60 kWh	\$459.85		\$24.42	\$546.95
12	Office #01	Electricity	2016-01-28	2016-02-26	4073.60 kWh	\$437.10		\$23.23	\$520.41
12	Office #01	Electricity	2016-02-27	2016-03-30	4286.40 kWh	\$459.93		\$24.46	\$547.89
12	Office #01	Electricity	2016-03-31	2016-04-28	3404.00 kWh	\$379.38		\$20.20	\$452.55
12	Office #01	Electricity	2016-04-29	2016-05-27	3532.80 kWh	\$394.26		\$20.98	\$470.05
12	Office #01	Electricity	2016-05-28	2016-06-27	4016.00 kWh	\$448.18		\$23.83	\$533.90
12	Office #01	Electricity	2016-06-28	2016-07-27	4324.00 kWh	\$482.56		\$25.63	\$574.11
12	Office #01	Electricity	2016-07-28	2016-08-26	4564.00 kWh	\$509.34		\$27.04	\$605.61
12	Office #01	Electricity	2016-08-27	2016-09-27	3899.20 kWh	\$435.15		\$23.16	\$518.80
12	Office #01	Electricity	2016-09-28	2016-10-27	3988.00 kWh	\$445.06		\$23.66	\$530.02
12	Office #01	Electricity	2016-10-28	2016-11-28	4468.00 kWh	\$498.63		\$26.50	\$593.46
13	Office #02	Electricity	2015-11-06	2016-01-06	8320.00 kWh	\$892.74		\$47.46	\$1,063.03

Reporting & Charts Home Page

The **Reports** button on the **Menu Bar** will provide you with access to all E&S Charts and Report Exports.

Reports with a **Chart icon** indicate graphical reports.

Reports with a **Notebook icon** indicate tabular reports.

To begin our next section select the **Utility Consumption Report**.

PM Assets | Reports | Tool Box | Configure | Preferences | Admin | Add Favorite | Print | Help

Energy and Sustainability Reports / Carbon Footprint Reports

Carbon Footprint Comparison Report	Displays CO2 Emissions per Sq M or Sq Ft, by Facility for a given period.
Carbon Footprint Report	Displays CO2 Emissions by Facility or other criteria. Total CO2 tonnes are displayed for the period selected. The default period is previous 12 months, however this can be changed using the Filters button. See also the Carbon Footprint Trending report.
Carbon Footprint Trending Report	Trending of Utilities vs Carbon footprint. Uses the CO2 levels for the province that the facility resides. You can check the CO2 level parameter on the Meter Setting page. Only Electricity and Natural Gas consumption contributed to the carbon footprint.

Energy and Sustainability Reports / Energy Modeling

Cost Avoidance	Displays amount of Energy cost saved vs the Predicted cost based on Regression analysis of Weather data and past usage for the period selected. By default this chart selects Electricity and Natural Gas meter types. You can change this selection from the Filter window.
CUSUM Cost Avoidance Using Base Year	Displays cumulative amount of Energy saved vs the Meters Base Year. Each Meter may have their own specific base year, or use a system default, or a specific Base Year can be specified for this report using the Filter window. By default this chart selects Electricity and Natural Gas meter types. You can change this selection from the Filter window.
CUSUM Cost Avoidance Using Regression	Displays cumulative amount of cost savings vs the Predicted usage based on Regression analysis of Weather data and past usage for the period selected. By default this chart selects Electricity and Natural Gas meter types. You can change this selection from the Filter window.

Energy and Sustainability Reports / Error Analysis

Meter Reading Warning Report	Displays any readings as entered that result in a daily average value differing more than expected based on the average daily values for the previous 6 months. (The threshold values are configurable in the Configure - Company Settings menu).
Variance Report	Displays various types of variance data as compared to the Meters default Base year or specific base year as specified.

Energy and Sustainability Reports / Utility Budget Reports

Budget vs Actual	Shows Budget vs Actual and Variance delta amount.
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Energy and Sustainability Reports / Utility Data Reports

Utility Consumption Report	Displays consumption of selected Utility by Facility.
Utility Trending Report	Displays cost of utilities over time
Utility Trending vs Mean Temperature	Trending of Utilities vs recorded Mean temperature. Note: Please ensure the closest Environment Canada Weather Station is chosen for each meter. This is setup on the Meter page and will default to the City that the Facility resides in (if a Station exists for that location).
Year Comparison Report	Displays past two years overlaid for comparison of utility consumption.

The **Reports Home Page** displays a helpful description next to each available report.

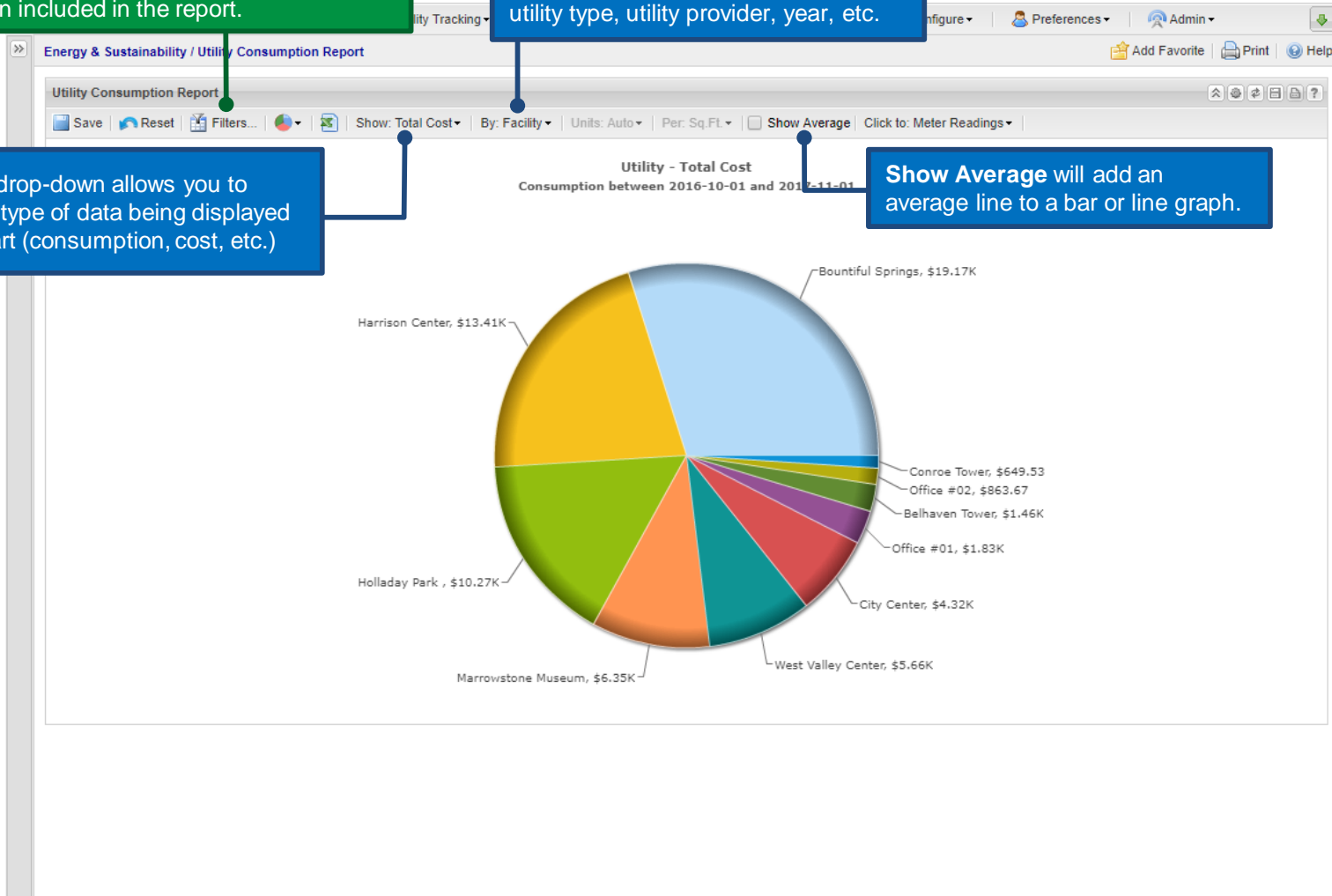
Utility Data Reports

The **Filters** menu allows you to adjust what data is included in the report.

The **By** drop-down organizes the report data by facility, region, function, utility type, utility provider, year, etc.

The **Show** drop-down allows you to change the type of data being displayed on your chart (consumption, cost, etc.)

Show Average will add an average line to a bar or line graph.



Report Filters

Reports can be filtered by the **Custom Detail** questions that are set-up against your facilities.

The **Date Range** filter allows you to specify the time period of utility data being included in the report.

The drop-down fields allow you to filter what utility data is included in your report.

After adjusting the filters select **Apply**.

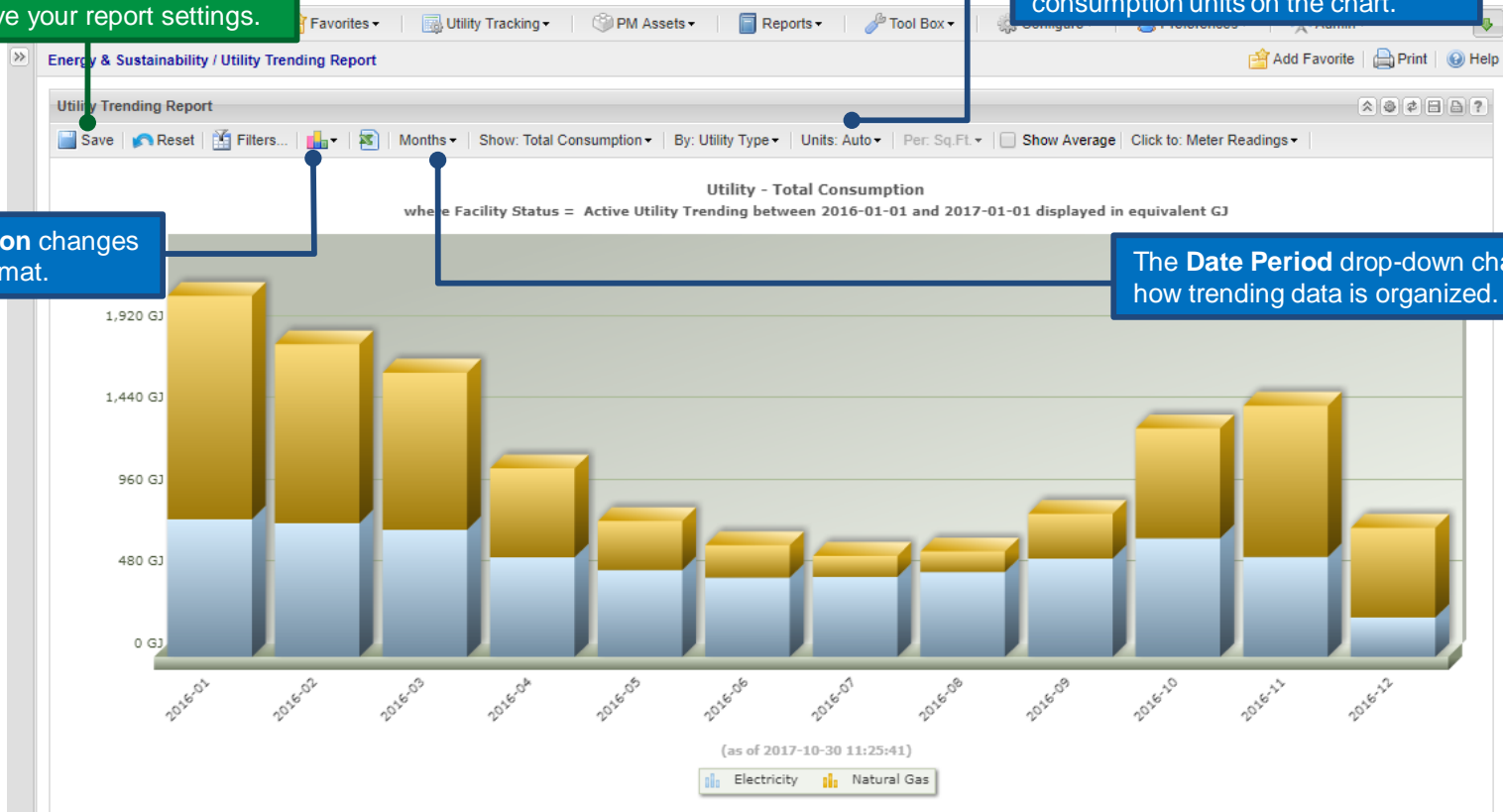
Utility Data Trending Reports

After a report is customized you can use the **Save** button to save your report settings.

When reporting on consumption **Units** will allow you to change the consumption units on the chart.

The **Chart Icon** changes the report format.

The **Date Period** drop-down changes how trending data is organized.



Saving Reports

Home | My Dashboard | Favorites | Utility Tracking | PM Assets | Reports | Tool Box | Configure | Preferences | Admin

Energy & Sustainability / Utility Trending Report

Utility Trending Report

Months | Show: Total Consumption | By: Utility Type | Units: Auto | Per: Sq.Ft. | Show Average | Click to: Meter Readings

Utility - Total Consumption
where Facility Status = Active Utility Trending between 2016-01-01 and 2017-01-01 displayed in equivalent GJ

1,920 GJ
480 GJ
0 GJ

2016-01 2016-02 2016-03

Save Report

Title: * Utility Trending Report

Description: Displays cost of utilities over time

Menu: * Reports

Sub Menu: * Utility Data Reports

- Analytics
- Asset Reports
- Carbon Footprint Reports
- Company Reports
- Facility Data Reports
- PM Event Reports
- SR Reports
- Staff Reports
- Utility Budget Reports
- Utility Data Reports
- My Reports

Save Save as New Cancel

30 11:20:41

Electricity Natural Gas

It is important to give your report a unique **Title** as this will allow you to differentiate between your saved reports.

The **Description** allows you to provide a brief summary of the Reports main use and function. This is especially important if you are saving the report for others to use.

Company Reports are available to all users in the database.

My Reports are available to your user account only.

Clicking **Save** will save the report to the folder you have selected. If you are saving an existing report you have the option to **Save as New** which will save a new version of the report.

Dashboard Reports

Dashboard reports allow you to show multiple reports together on a single screen.

The **Create Dashboard** option is found under the **Reports** folder.

My Dashboard allows you to set a dashboard as your home screen layout.



The **Down Arrow** button can be used to reveal the report menu with all the same options available when working with an individual report.

When adding reports to a dashboard you can use the system default reports or saved personal/company reports. Reports can be selected that relate to one module or multiple different modules.

Tips & Tricks: Tools & Customization

Tips & Tricks

Favorites allow you to save commonly used links in the software (similar to the favorites function on your browser).

The **Tool Box** contains many useful links including the **Energy Module Meter Types** table and **Weather Station Map**.

Help buttons (blue question marks) are located throughout the program. Clicking on them will provide with information specific to the page you are viewing.



Z – US ASSET PLANNER COMMERCIAL

The screenshot displays the 'Energy & Sustainability / Home' dashboard. The top navigation bar includes 'Home', 'My Dashboard', 'Favorites', 'Utility Tracking', 'PM Assets', 'Reports', 'Tool Box', 'Configure', 'Preferences', and 'Admin'. A 'Help' button is visible in the top right corner.

The main content area is divided into three panels:

- Cost by Utility:** A 3D bar chart comparing Electricity and Natural Gas costs for the periods 2015-10, 2015-11, and 2015-12. The y-axis ranges from \$0 to \$31,000.
- Three Year Cost Comparison:** A line graph showing cost trends from 2015 to 2016. The y-axis ranges from \$0 to \$42,000.
- Top 10 by Cost:** A pyramid chart listing the top 10 most expensive assets. The data is as follows:

Asset Name	Cost
Bountiful Springs	\$19.17K
Harrison Center	\$13.41K
Holladay Park	\$10.27K
Marrowstone Museum	\$6.35K
West Valley Center	\$5.66K
City Center	\$4.32K
Office #01	\$1.83K
Belhaven Tower	\$1.46K
Office #02	\$963.67
Conroe Tower	\$649.53

Below these panels is a map titled 'Map by kWh/Sq.Ft.' showing energy consumption data points across a city area. A search bar and navigation controls are visible at the bottom left.

Clicking on **Home** will take you back to the main dashboard. This can also be done by clicking on any of the **Module icons**.

User Preferences

To customize your AssetPlanner experience click on **Preferences** button in the **Menu Bar**.

The screenshot shows the 'Z - US ASSET PLANNER COMMERCIAL' interface. The 'Preferences' dialog box is open, showing the 'General' tab. The settings are as follows:

- Paginate Listings:** 50 Items
- Notes Display Order:** Display Most Recent Note Last
- Print button action:** Open Print view
- Page Break between Sections on Reports:** Yes
- Default Fiscal Year Selection:** Yes
- Remember last Cost Item entered:** Yes
- Number of History Items to keep:** 20
- Color Theme:** Gray
- Tactical As Home Page:**

Buttons at the bottom of the dialog: Save, Change Password, Logout, Help.

Paginate Listings sets the number of items displayed per page. In this example any grids larger than 50 items would display on multiple pages.

Number of History Items to Keep sets the number of history items saved & displayed on the **Navigation Panel**.

Change the AssetPlanner **Color Theme**.

You can **change your password** or **log out** using the buttons located across the bottom.