Navigator Start Guide

Version SG001

SIEMENS

Content

Chapter 1. Introduction

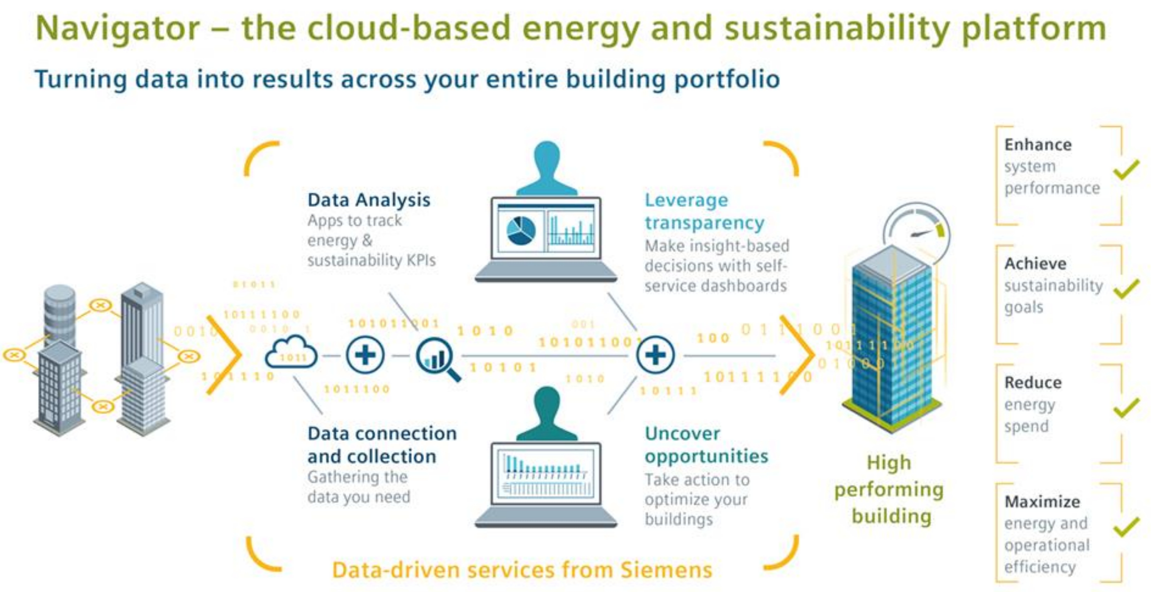
Welcome to Siemens Navigator.

Navigator is a cloud-based energy and sustainability management platform designed turning data into results across your entire building portfolio. The platform is customizable, allowing the user to achieve: en-ergy, sustainability, and system performance targets. The purpose of this quick start guide is to give you a basic understanding of concepts with regard to the usage of each of the Siemens Navigator functions. The intention it to enable you to quickly come to grips with the more complex functionality as you gain experience in using Siemens Navigator. Simple steps are provided to help you in the following areas:

- Login
- The Common Toolbar
- Favorite tools
- View assets
- Change password
- Change Dimension
- Navigate and use Apps
- Meter types and entering meter readings
- Generate reports & Favorite/subscribed reports
- Use Analyze and create graphs

As a user you may have the following rights to the system which have been assigned to you. These will depend on the user level you have been given. If you require a different user level please contact your supporting Advanced Service Centre (ASC).

- Reading - Generate and subscribe to reports and display meter lists
- Writing - Enter and edit meter readings only (no meter exchange)
- Customize – dashboard



If you require further functionality or support please contact your Advanced Service Centre (ASC).

Chapter 2. Supported Browsers

The current version of Navigator is supported and compatible with the following browsers.

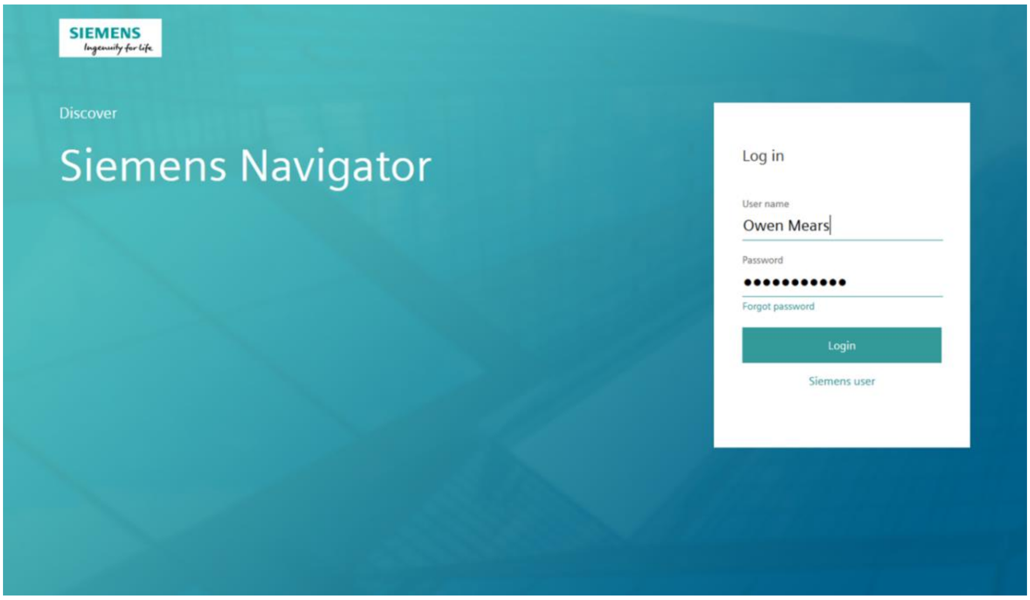
Internet Explorer	8	No
	> 10	Yes
Firefox	Current	Yes
Chrome	Current	Yes
Others	Not tested	-

Chapter 3. How to Login

Username and password are provided by your Advanced Service Centre (ASC).

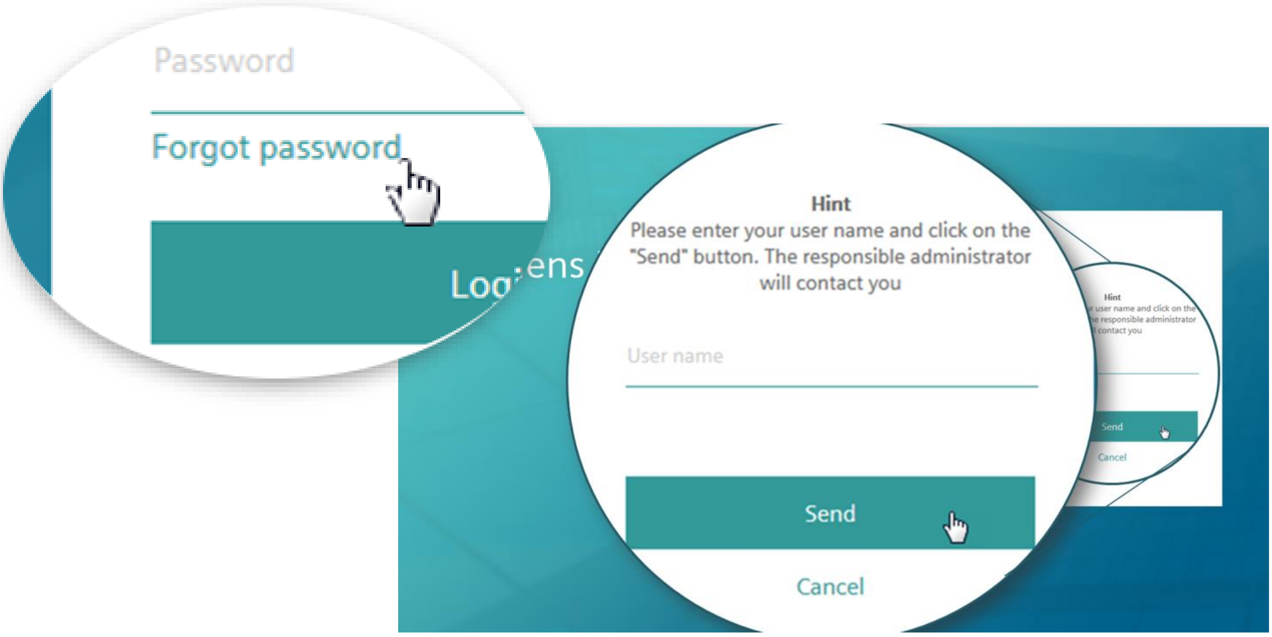
Go to: **https://eadvantage.siemens.com/**

The Navigator login page: As an external user you must use your **Username and Password** to login.



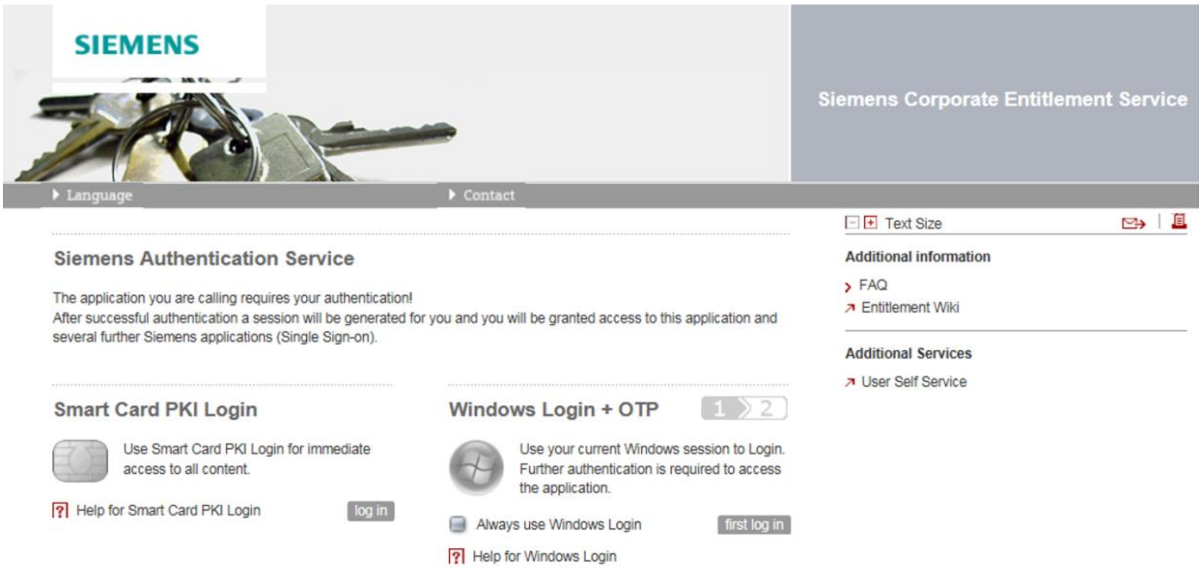
You are directed to your landing page.

If you forget your password click **Forgot password** and you are given directions as to what to do next.



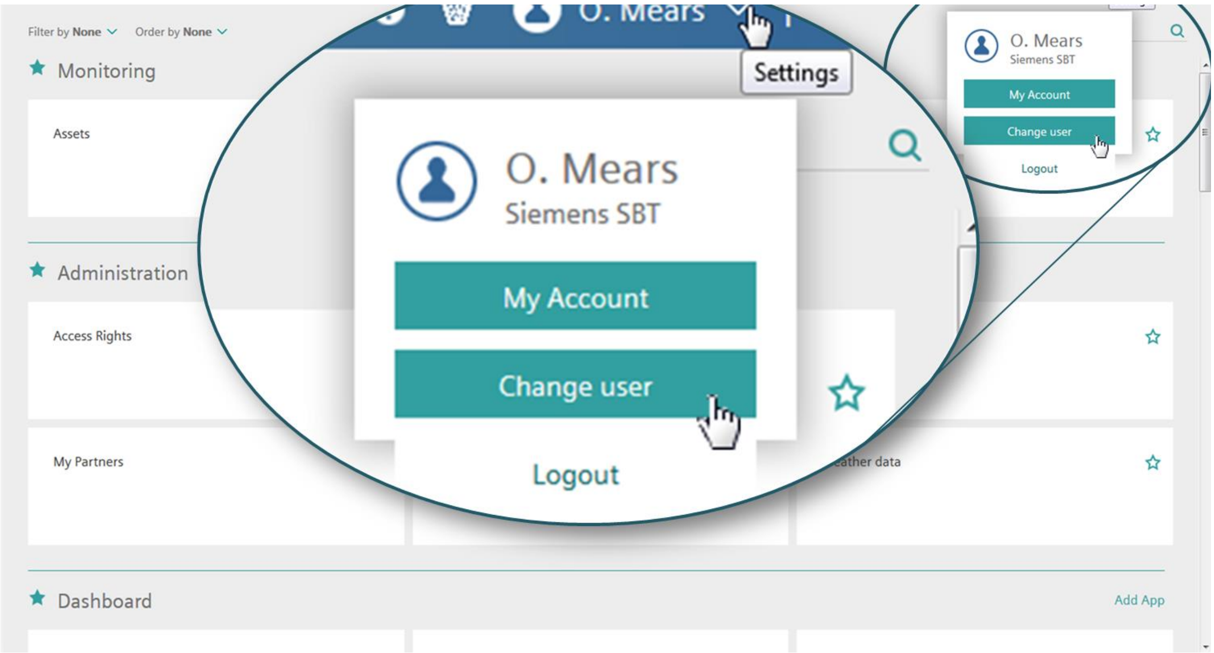
As an internal user you must use the **Siemens user** login:

You are directed to the **CES** login page

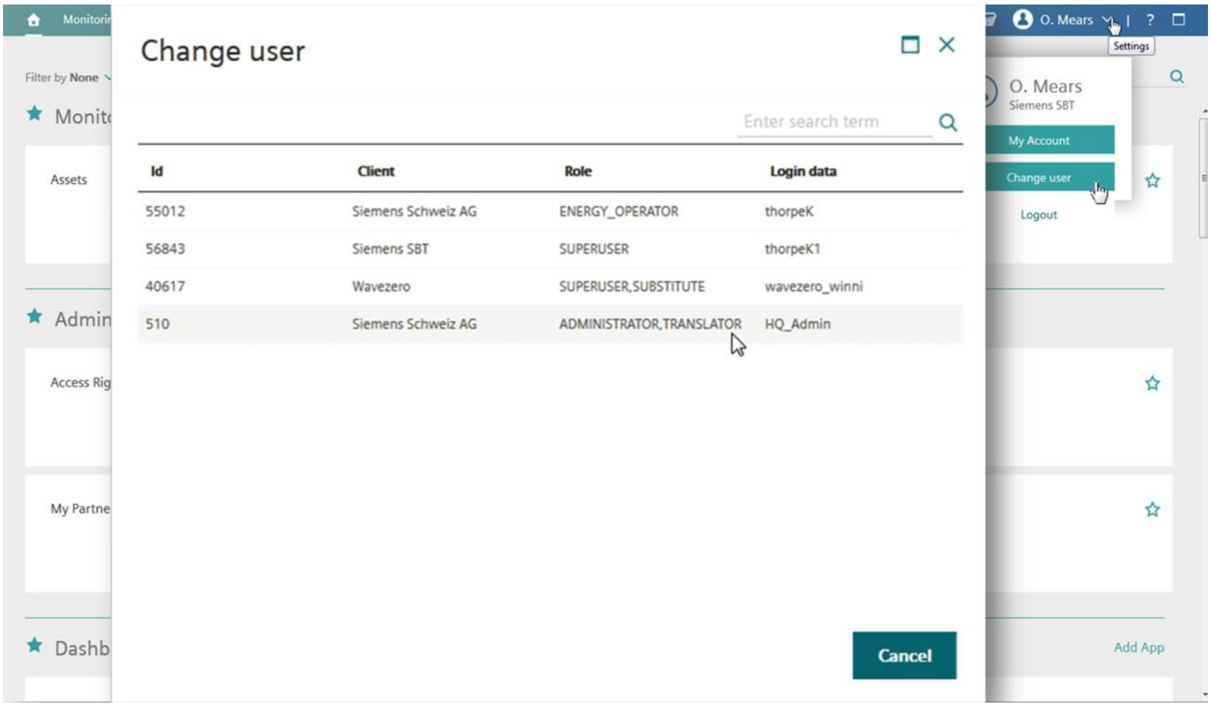


After your login is authenticated you are logged in. If you have multiple accounts, you are logged in through the account with the highest authorized level of access.

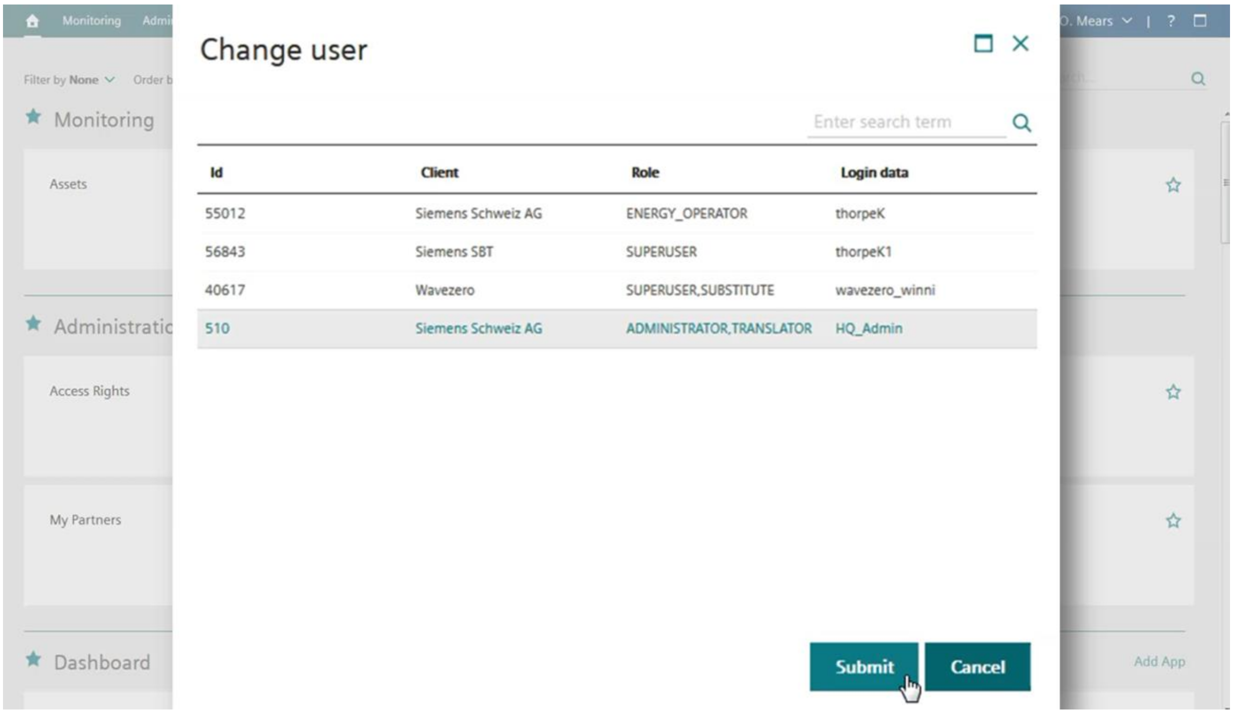
If you wish to change accounts immediately or at a later time click the **Settings** arrow and then click **Change user.**



Click the account you wish to change to in the **Change user** dialog box that opens.



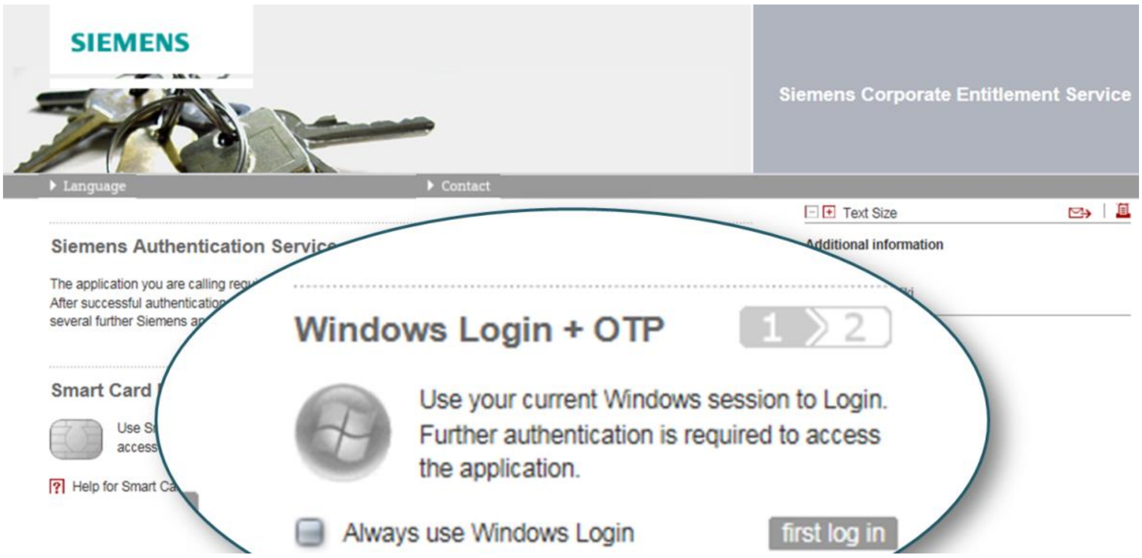
The **Submit** button is shown. Click **Submit**



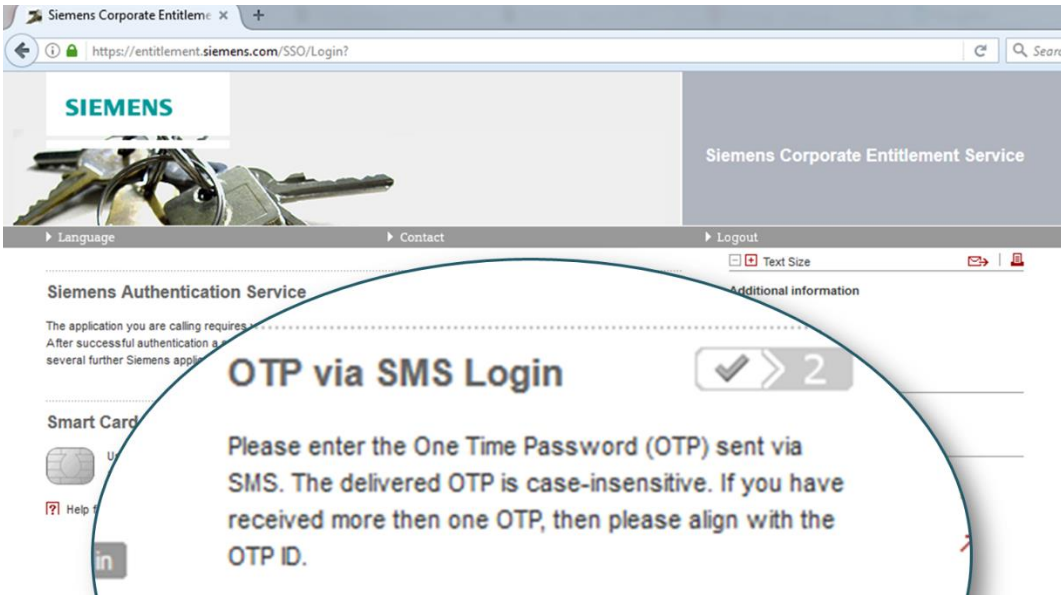
Your maximum login session is eight hours, however a session times-out after two hours of inactivity. Five minutes before the end of a session you get a reminder of the pending end of session. After eight hours you are automatically logged out and asked to re-authenticate.

If your user account has the SMS authentication option enabled, you must enter a one-time password, in addition to the normal username and password.

The one-time password/code is transmitted as an SMS to the mobile phone that is registered to the account.



To log in click **first log in** and a one-time password (OTP) editor with an OTP ID is shown. Within a few minutes you receive an SMS with the OTP that corresponds to this ID.



Type in the **OTP** received per SMS and click **log in.** When you are logged on, Navigator displays the ap-plications and functions that are allocated to you. To logout click **Logout**.

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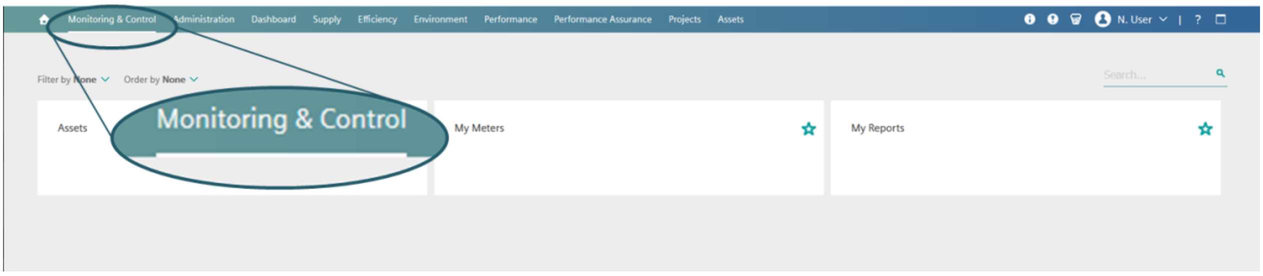
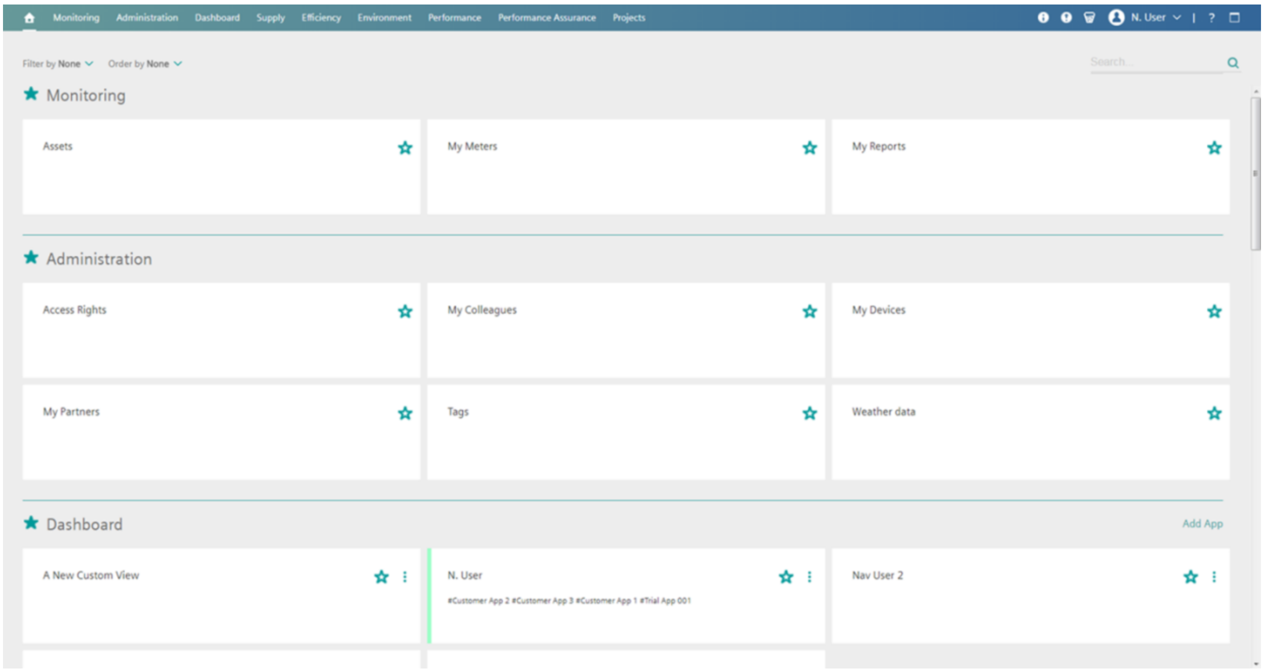
Chapter 4. Home Page

On successful login your landing page by default is the lead application group in the favorites list as-signed to you. Here in our example the **Monitoring & Control** overview. The currently displayed favorite is underlined in white.



Click the **Home** icon to display the **Home Page**. Your Home Page displays the **Application Groups** assigned to you. These are seen in the rows of tiles on your screen divided into groups set one above the other. These groups are titled with names that correspond with the horizontal list in the **Common Toolbar** above the **Home Page.** You can, however customize this Home Page further to suit your preferences.

The **Application Groups** within the **Home Page** are assigned to you by your administrator. All **Application Groups** that are available are shown within this view. The **Application Groups** shown depend on your access level and your service level agreement.

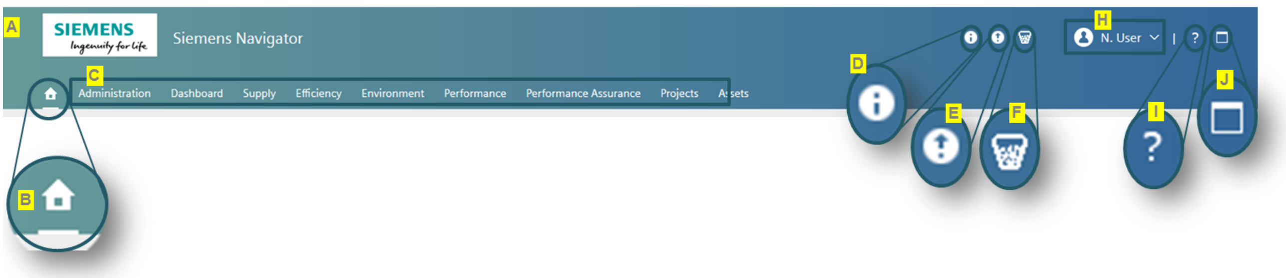


Click the home icon marked B as seen in the figure below. This opens/returns you to your home page.

Chapter 5. UI description

5.1 Common toolbar legend:

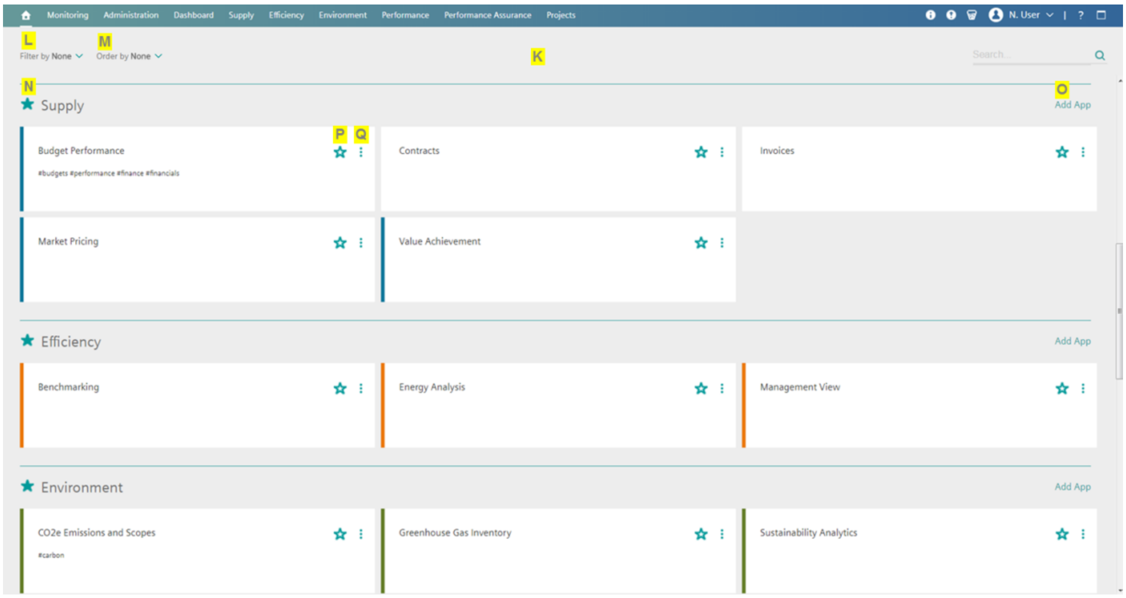
A: Common Toolbar	Select the favorite to display in the **Home Page,** gain access to other controls.
B: Home button	Quick access to the **Home Page** showing all the dashboards available to you. Clicking this icon always returns you to the **Home Page.**
C: Favorites	Contains **Application Groups** or **Apps,** which are a collection of preconfigured applications allocated to you by your administrator.
D: Intranet	Direct access to the Intranet information source selected by your administrator.
E: cRSP	Connects to the common remote service platform for authorized access to customer systems that are in the scope of your responsibility.
F: Trash	The Trash bin is the collection point for deleted meters.
H: My Account	Click your username and then **My Account** to change personal information, company information and change password.
I: Help	Provides server information and Navigator software version information.
J: Reduce	Create more screen space by reducing the **Common Toolbar** header, simply click this icon and the **Common Toolbar** is reduced.
K: Home Page	The **Home Page** ives you an overview of the apps assigned to you. This is your control center; here you have access to all **Application Groups** and **Apps.**
L: Filter by	With the **Filter** function you can filter your **Apps** by Category or Favorites.
M: Order by	You can set your system to order your **Apps** by **Favorites, Names** or other categories available to you.
N: Favorite button	This icon places the **App** or **Application Group** into the list of favorites.
O: Create new App	Click this button to create a new **App** or add an existing **App** to an **Application Group**.
P: Favorite not selected	This icon removes the **App** or **Application Group** from the list of favorites.
Q: Settings icon	Click this icon to open the various **App Settings.**
R: Search Filter	Enter your search parameters here.



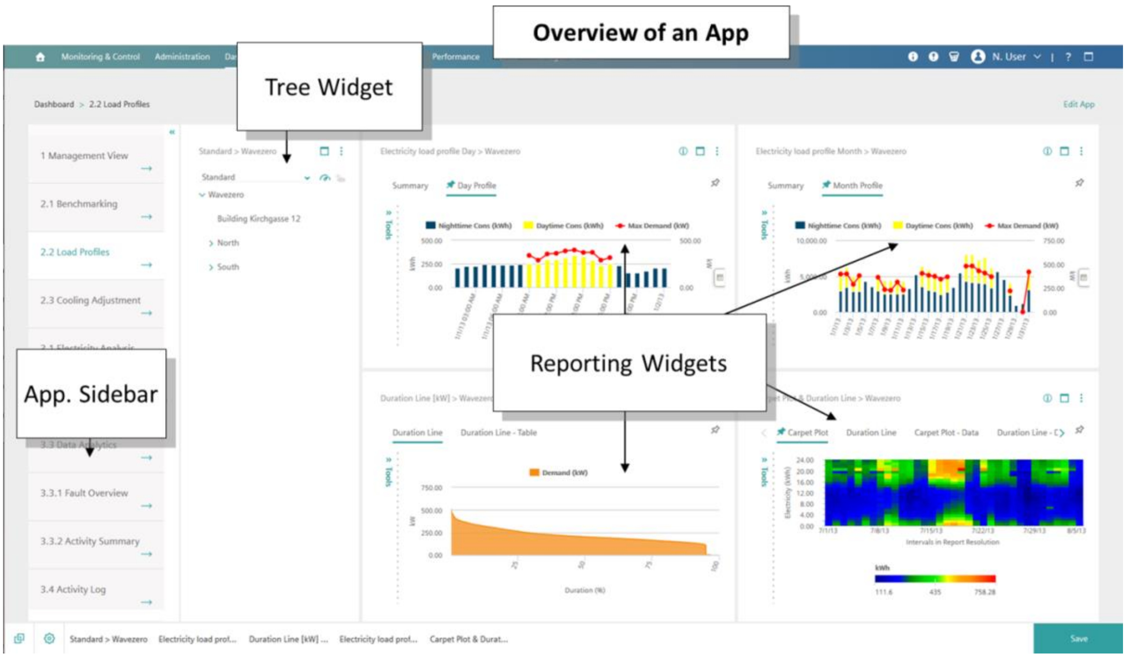
5.2 Description of the Home Page work space

The **Home Page** shows all the **Application Groups** that are available to you. If you click a tile or a favor-ite, this then replaces the **Home Page**. Click an **App** in the **Sidebar** of an **App** overview and this **App** is displayed in your workspace.

You can search and filter **Apps** and you can bookmark any **App** as a favorite. The **Apps** are color coded for quick and easy search and recognition. The color of each **App** corresponds to its category. Tags are added to each **App** so that you can search for them easily



It is possible to add **Apps** represented by the tiles in your **Home Page** according to your own specification. This is a specific feature of Navigator, you can configure a personal **App** to display available features in a customized format, for example **Reports**. You can add **Apps** to any of the displayed **Application Groups** with the exception of **Monitoring & Control** and **Administration.**



In Navigator **Apps**, widgets are used to display information (for example, a tree structure or a report). The widgets can be positioned and resized to suit your own preferences. Point the cursor at the abutting widgets and a line appears. Drag the line in the desired direction to resize the widget.

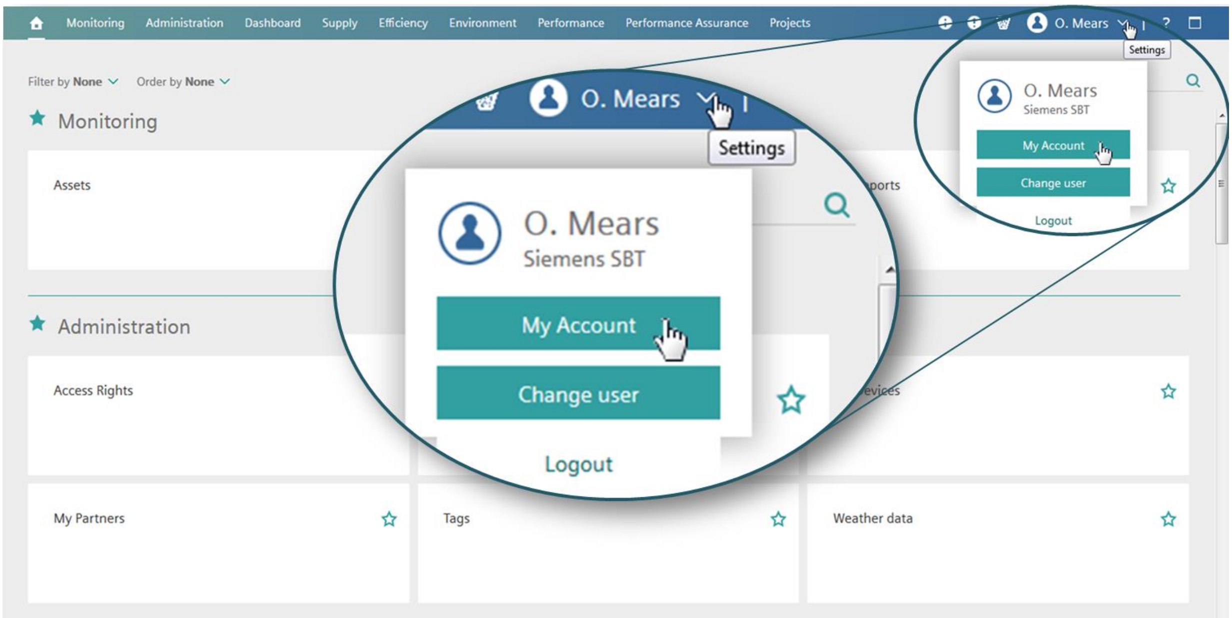
The **App Sidebar** displays the activation buttons for all the **Apps** contained in the **App Group**. To create more workspace on the screen for your widgets you can hide the **App Sidebar** by clicking the hide/unhide sidebar arrows.

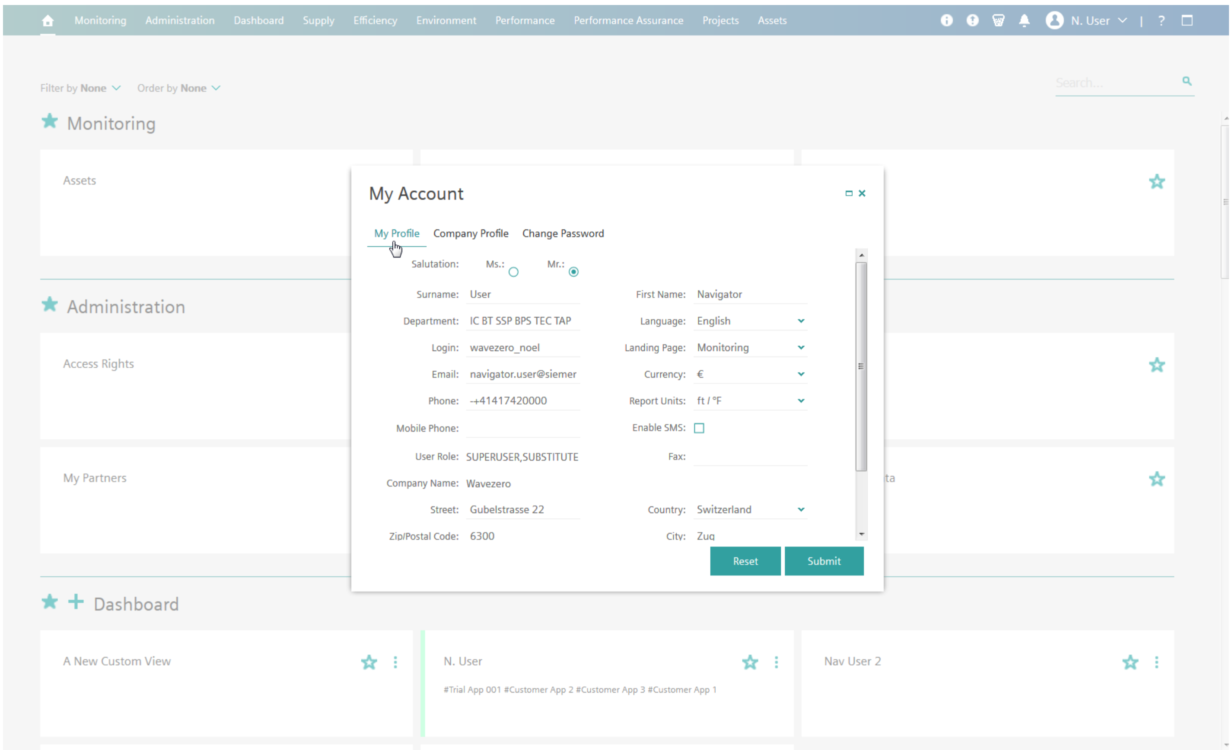
Chapter 6. Change settings

You can make settings to your personal data in **My Account**, which is situated in the top right of the **Common Toolbar.**

Click the username to open the **My Account** drop-down then click **My Account** to open the **My Account** dialog box.

If you find discrepancies, you can correct the information and click **Submit** to save your changes. Click **Reset** to undo any changes that you have made in the immediate dialog box.

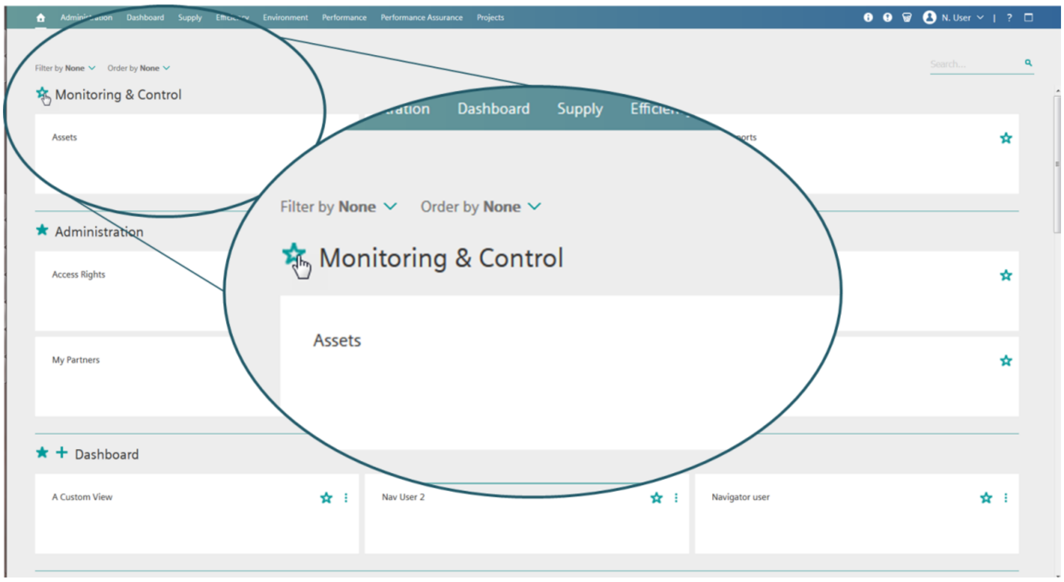




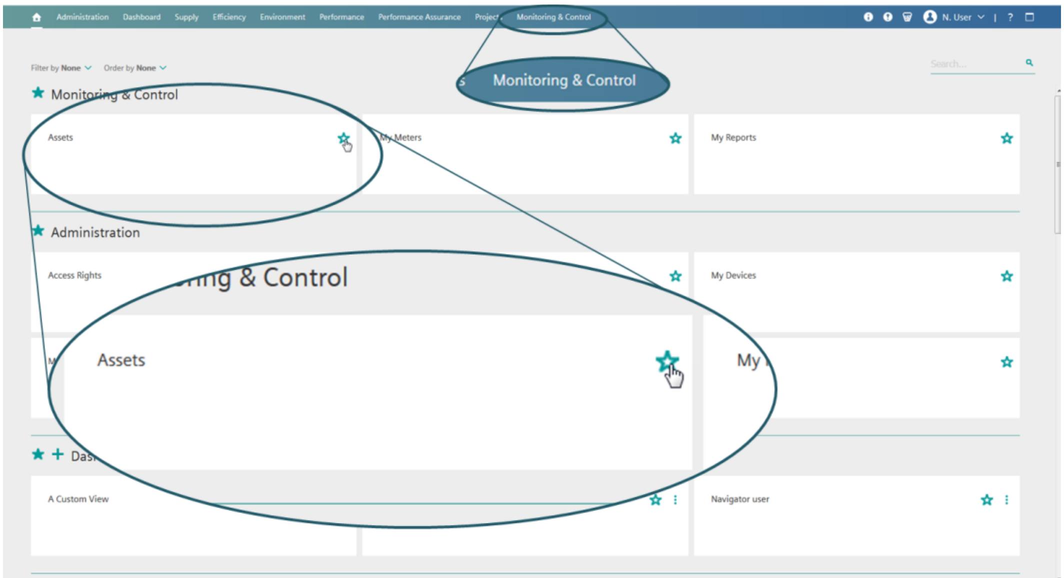
6.1 Other Settings

6.1.1 Setting a Favorite Application Group or App

To set an **Application Group** as a **Favorite**, simply click the unfilled star above the **Application Group**. A solid star signifies that the **Application** is already a **Favorite**:



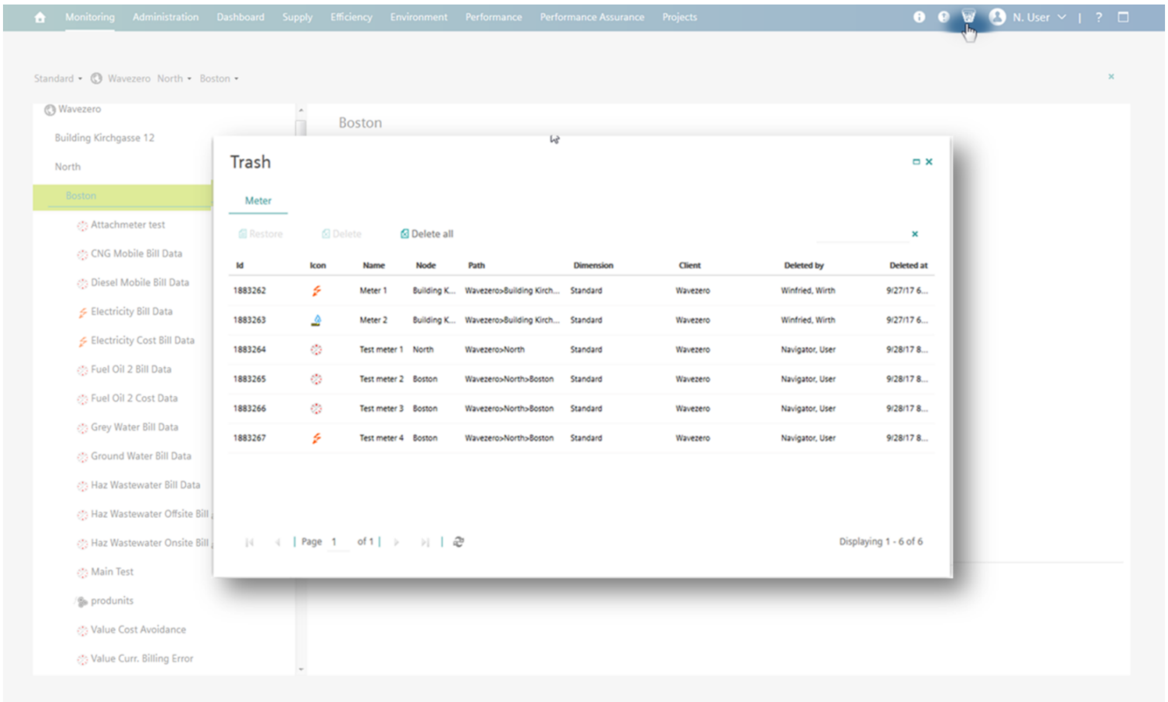
You can also set an **App** as a **Favorite.** Simply click the unfilled star above the **App**:



6.2 Trash bin

The **Trash** bin is the collection point for deleted meters. Meters that are deleted from the **Trash** bin are only then irrevocably deleted from the application. All deleted meters are recorded in the **Trash** bin table seen in the **Trash** dialog box. The **Trash** bin table contains columns with the following headings:

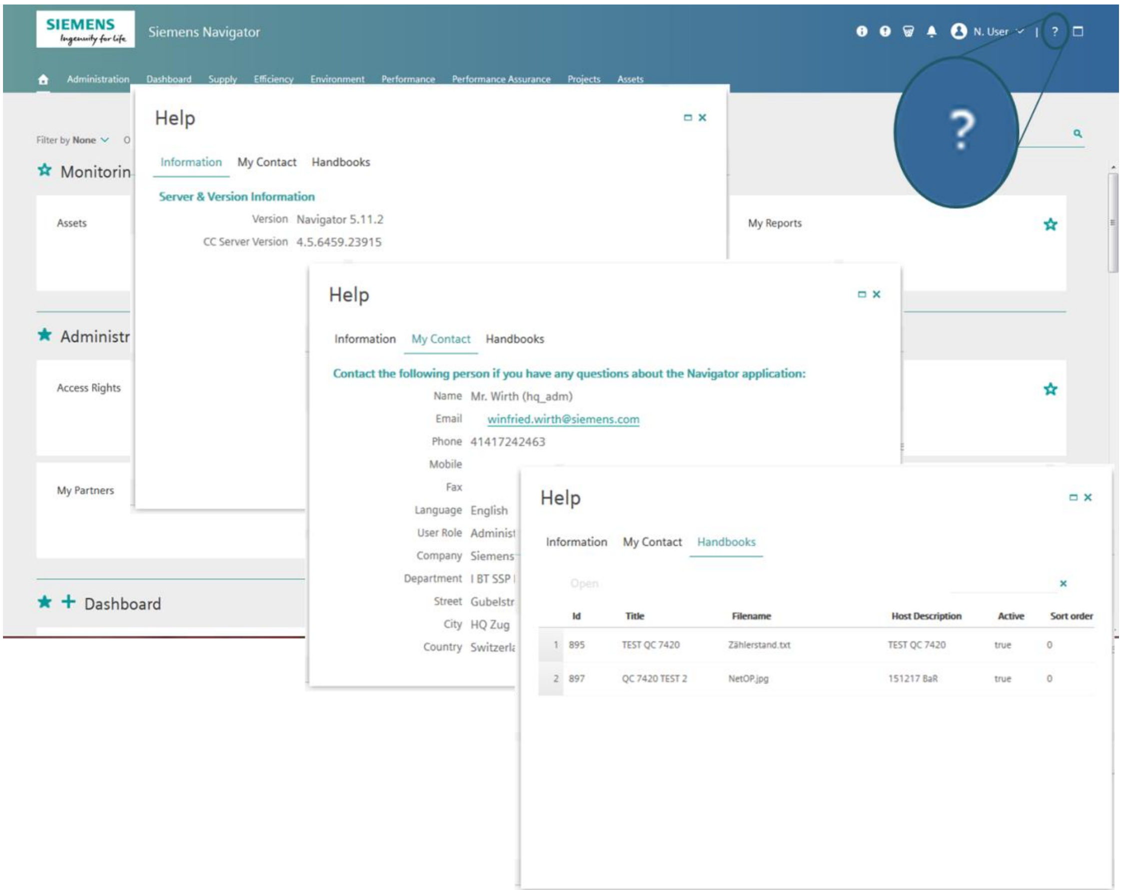
- **ID** - Deleted meter identification
- **Icon** - The icon of the meter
- **Name** - Meter name
- **Node** - The last node to which the meter was attached
- **Path** - The path of the node to which the meter was last attached
- **Dimension** - The dimension from which the meter was deleted
- **Client** - The client to which the meter was attached
- **Deleted by** - The user who deleted the meter
- **Deleted at** - Date and time of deletion



6.3 Help button

The **Help** button gives you the following information:

- **Information:** Server version and Navigator version
- **My Contact:** Your administrator's contact information
- **Handbooks:** Any documentation that your administrator makes readily available to you per download



Chapter 7. Working with an Application Group

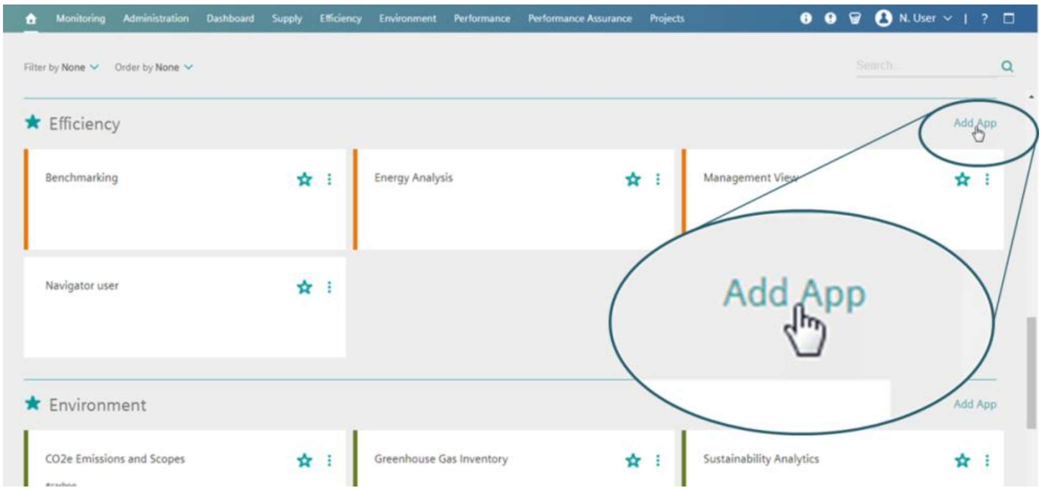
7.1 Create a New App

Application Groups or **App Groups** are a specific feature of Navigator. Each **App Group** comes with a standard set of **Apps** but you can add your self-configured **Apps** to the **App Groups**. Click an **App** to open the dashboard, which is your work space. You can configure your personal **Apps** based on features assigned to your account, for example assigned reports.

Step 1. To create a new **App**, click the **Home** button.
The **Home Page** opens showing all the **App Groups** assigned to your account

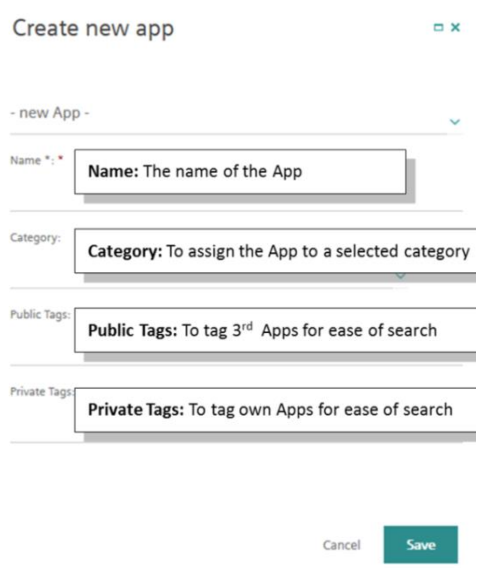
Step 2. Navigate to the required **App Group,** for example **Efficiency**

Step 3. Click the **Add App** button

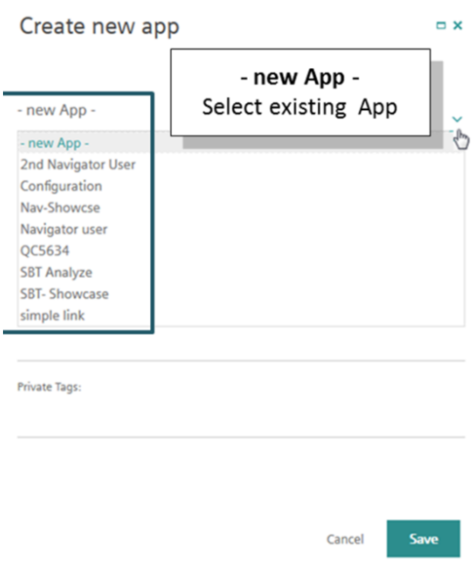


The **Create new app** dialog box opens. Here settings are made as follows:

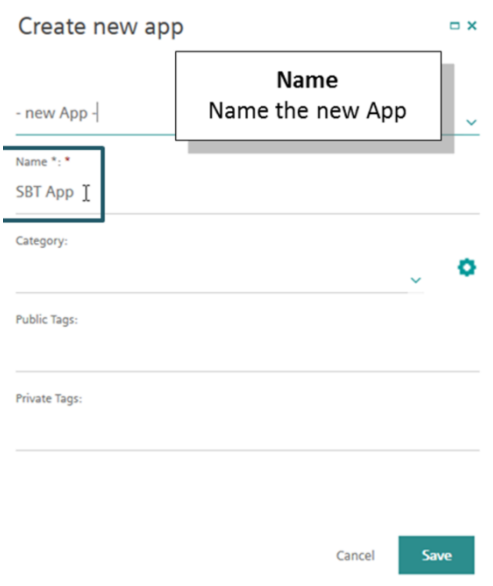
1.



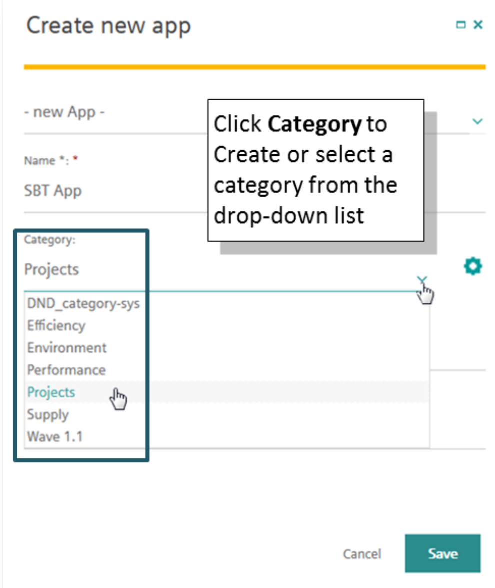
2.



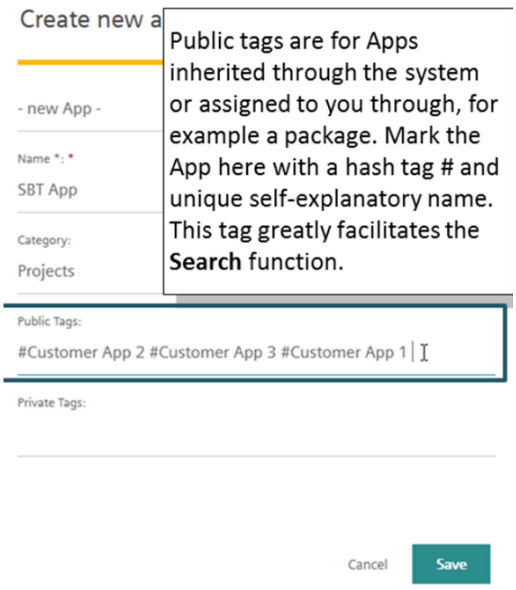
3.



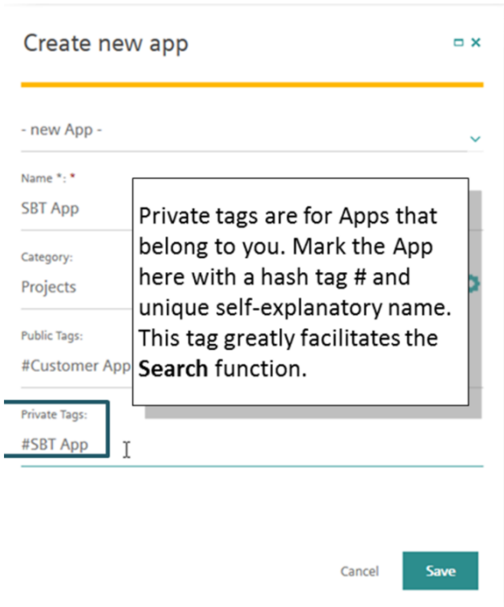
4.



5.



6.



Note: **Apps** that you create are owned by you and can be edited at any time by you.
You cannot edit **Apps** that you do not own. **Apps** that you inherit are owned by their creators.

Step 4. Click **Save** to confirm your settings.

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7.2 Add an existing App to an App Group

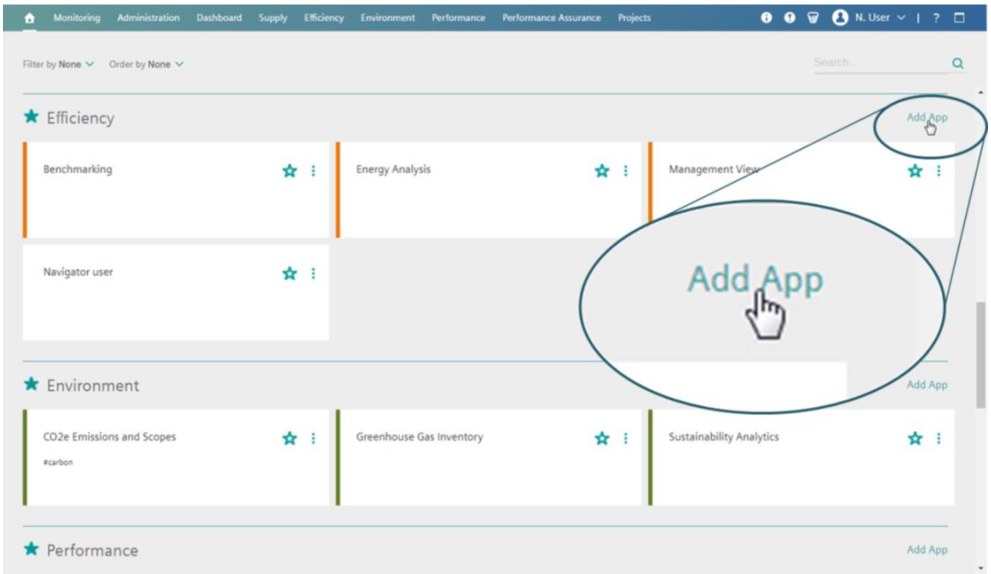
Add an existing **App** to an **App Group** as follows:

Step 1. Click the **Home** button to open the **Home Page**

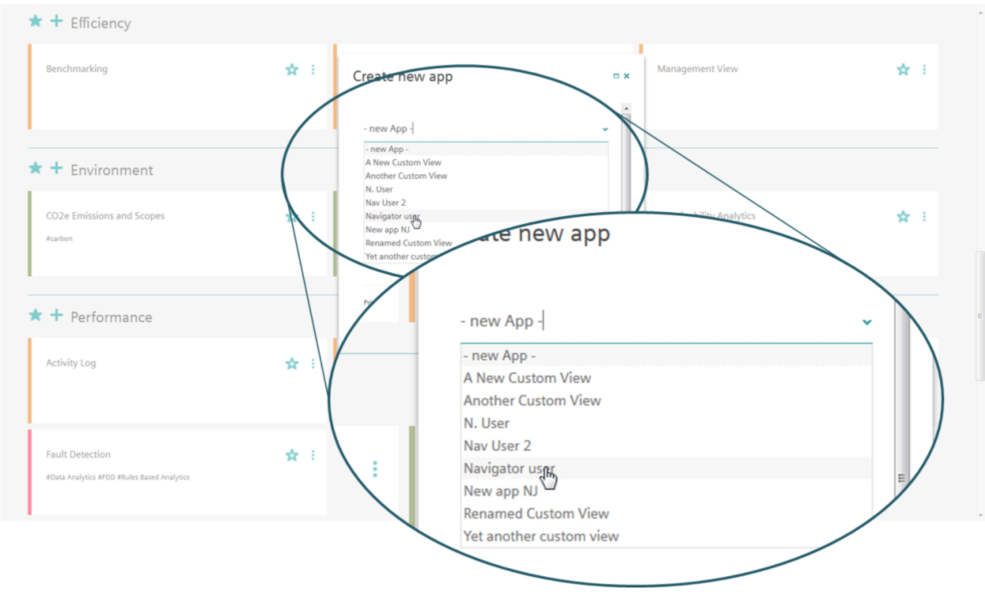
Step 2. Select the required **App Group** for our example **Efficiency**

Step 3. Click the **Add App** button

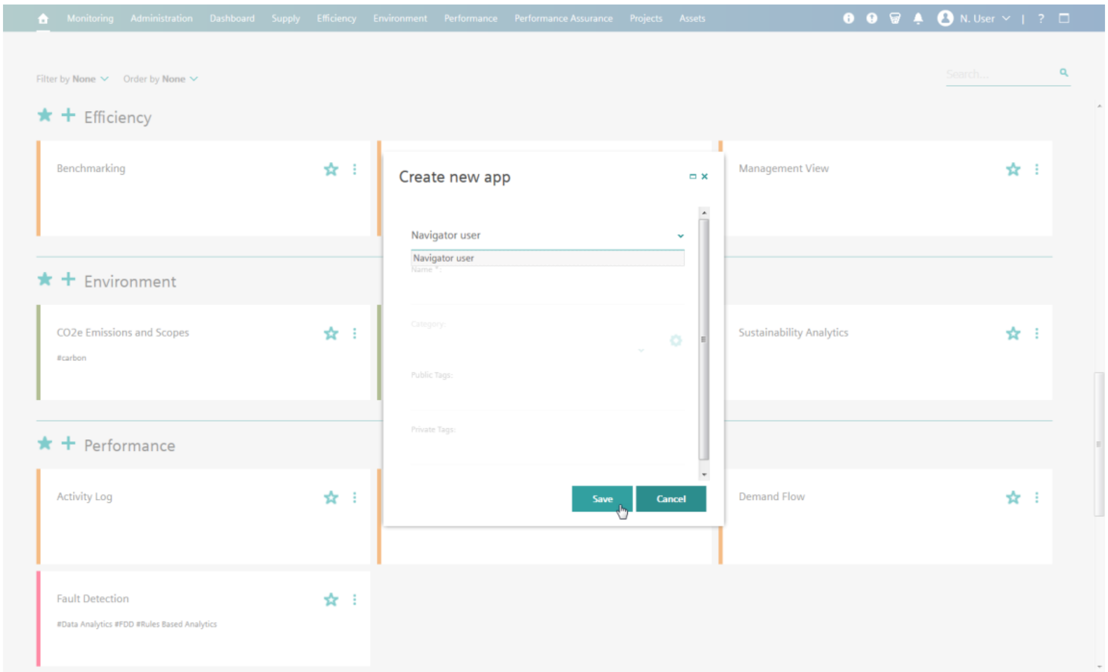
The **Create new** app dialog box opens



Step 4. Click the new **App** drop-down arrow and select the **App** from the list

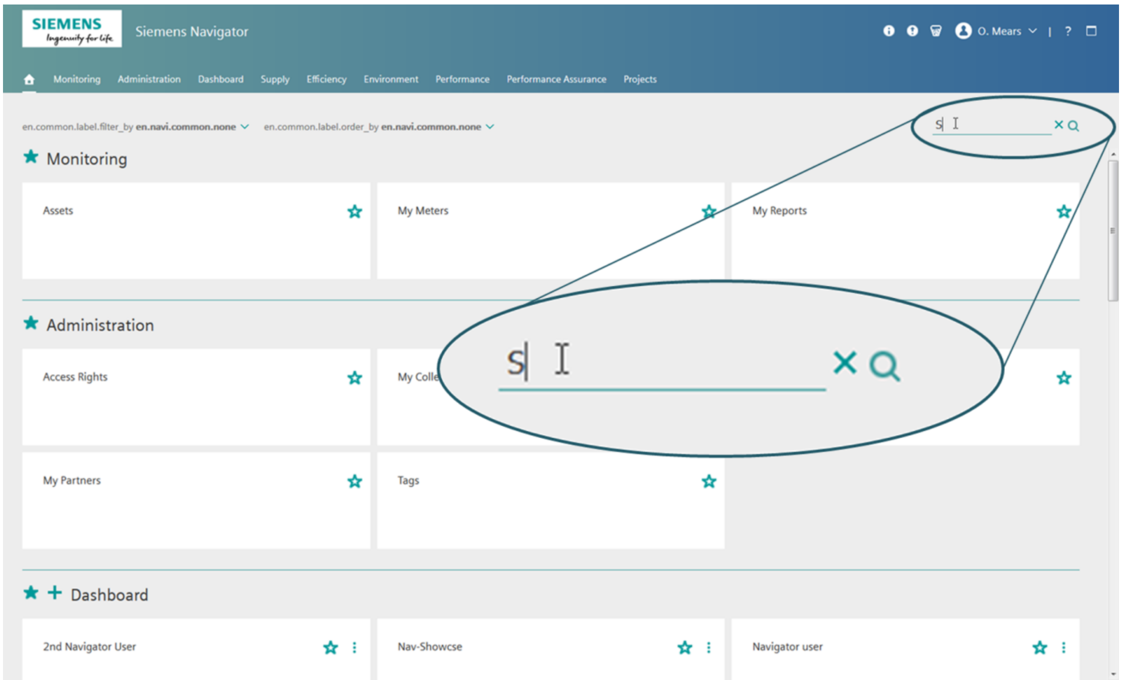


Step 5. Click **Save** to confirm

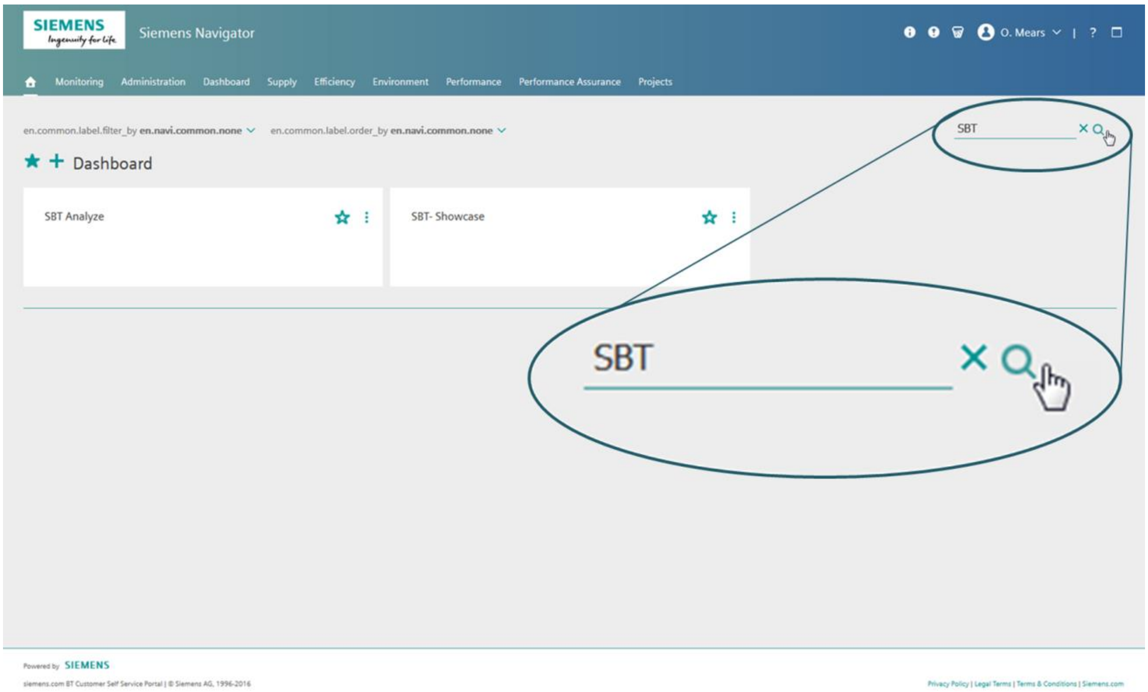


7.3 Search function

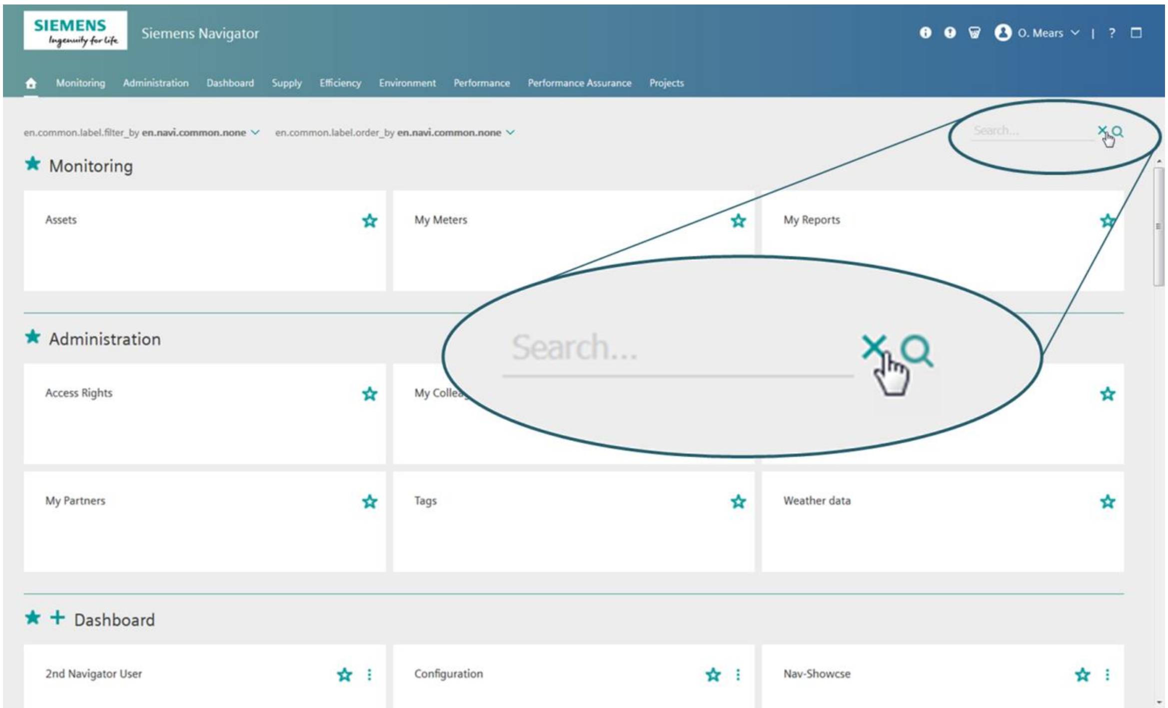
Navigator offers the possibility to search for **Apps**, meter, nodes and tagged entries using the **Search** editor in the top right of the main window. The search engine searches the currently displayed view. Thus, for example a search started in the **Home Page** considers **App Group** names, **App** names and tags.



In the **Home Page**, as you write the search function returns findings that correspond to your entries.

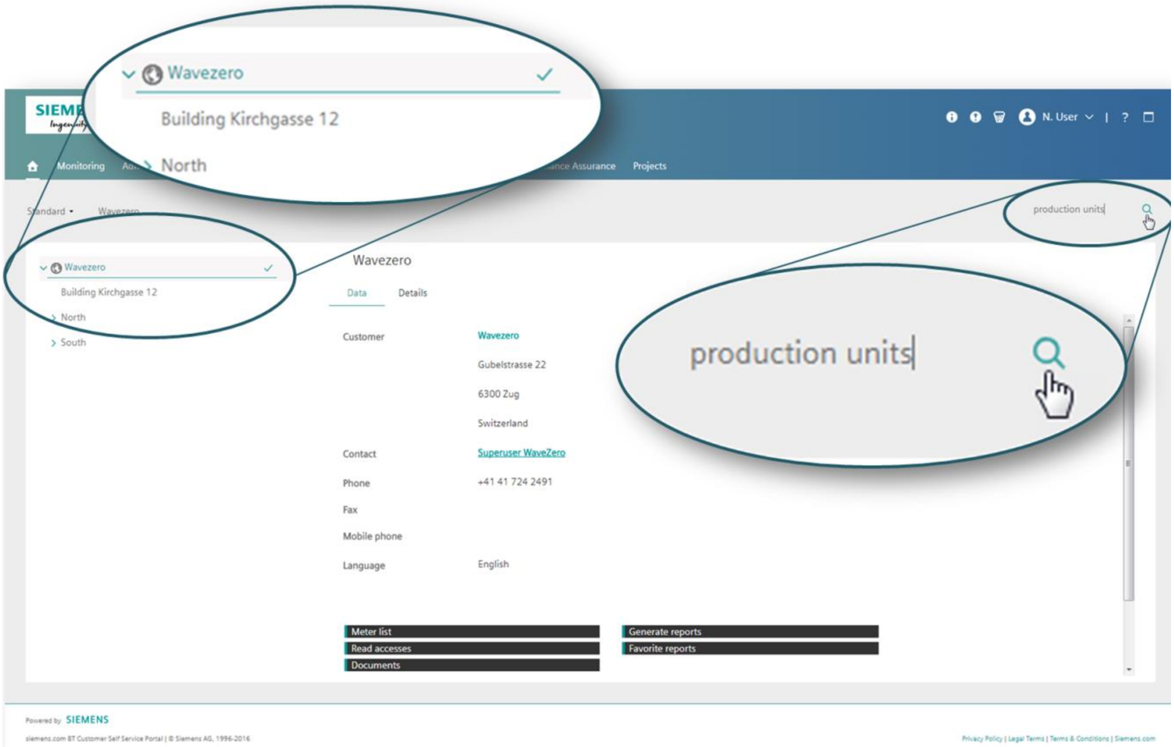


Click the **X** search cancellation button and the view returns the **Home Page**

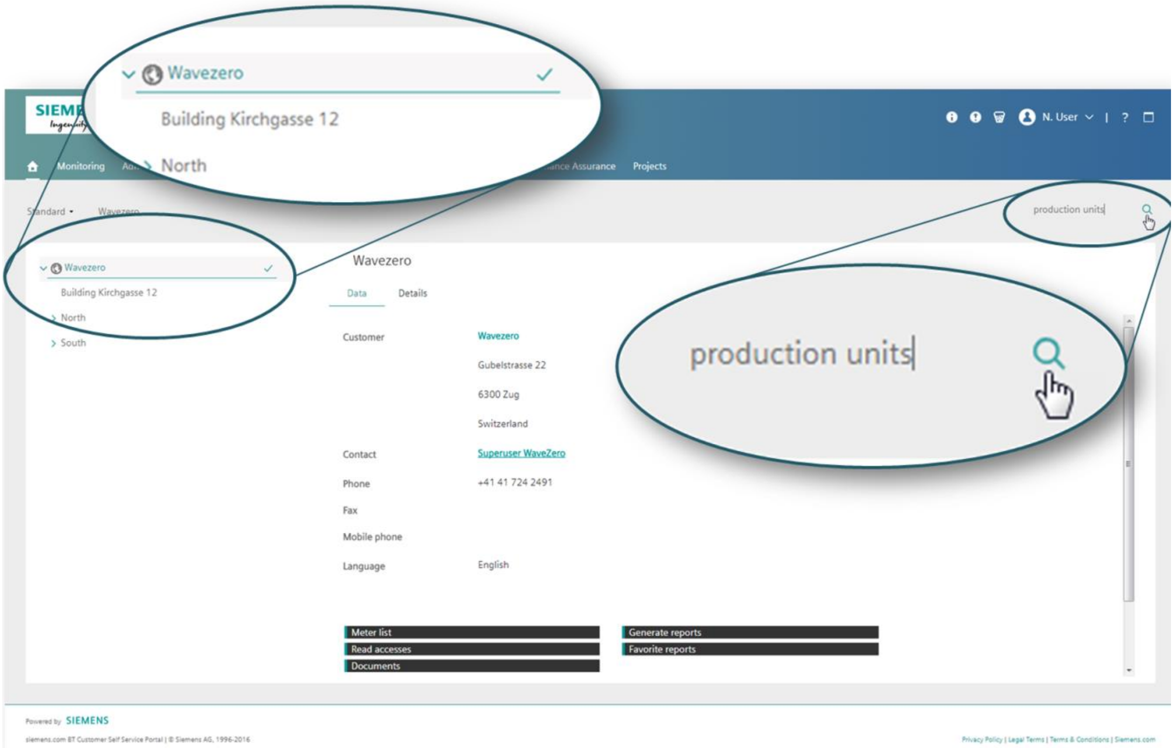


It is important to tag all newly created or assigned **Apps** as this greatly facilitates the search function.

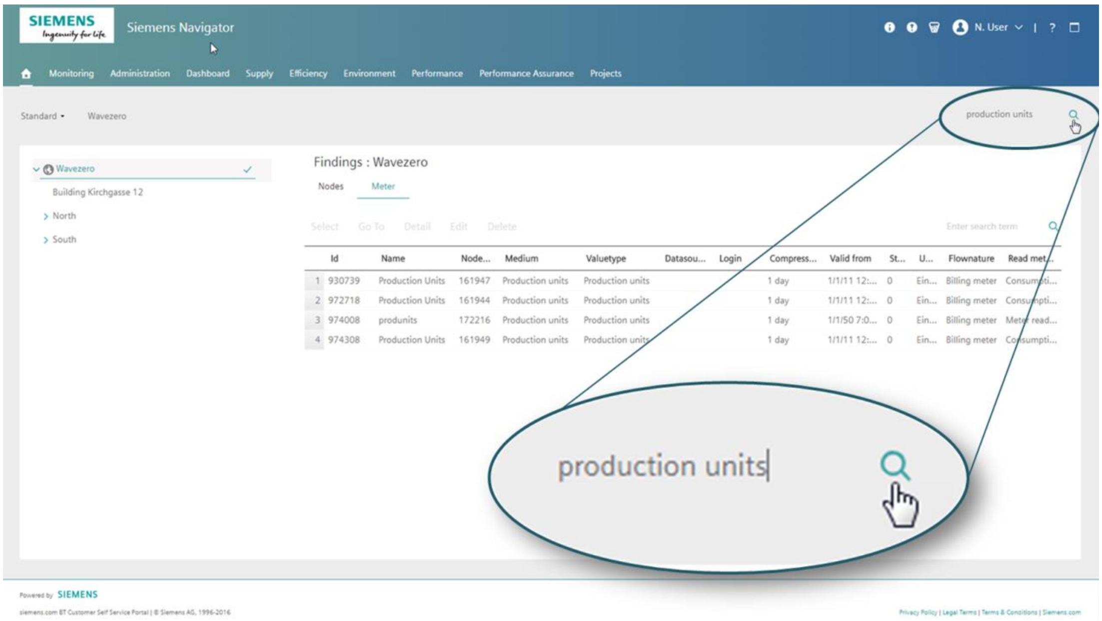
Another search example in the **Asset tree**:



The search is performed hierarchically from the search starting point, which is indicated by a check mark

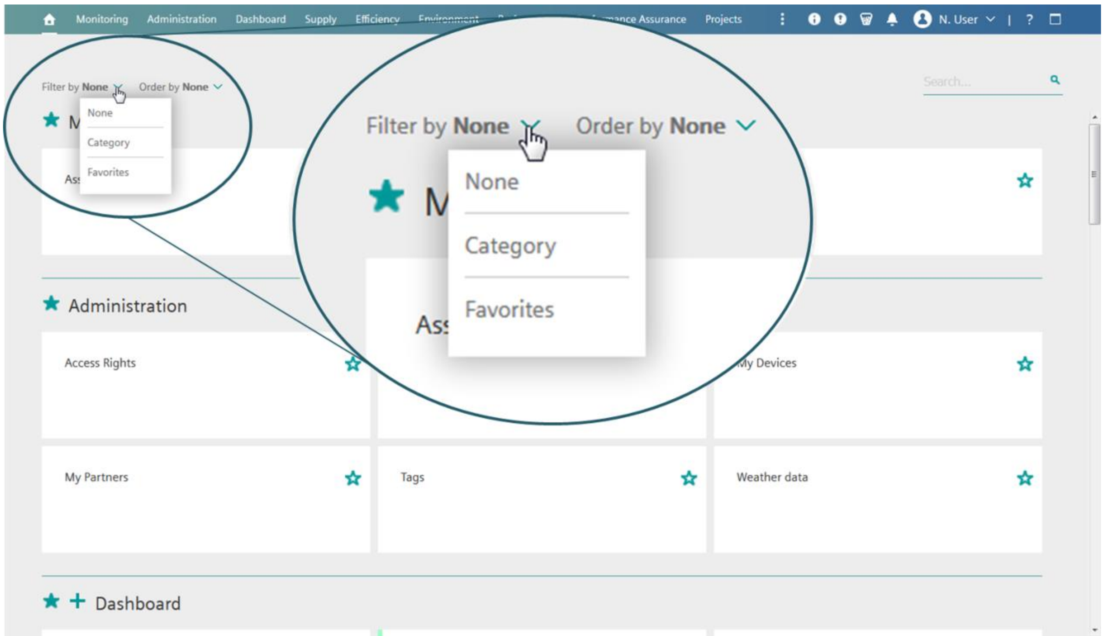


Search findings are displayed in a detailed table that provides information that is more individual with regard to your search parameters. You are able to carry out a search across an entire client.

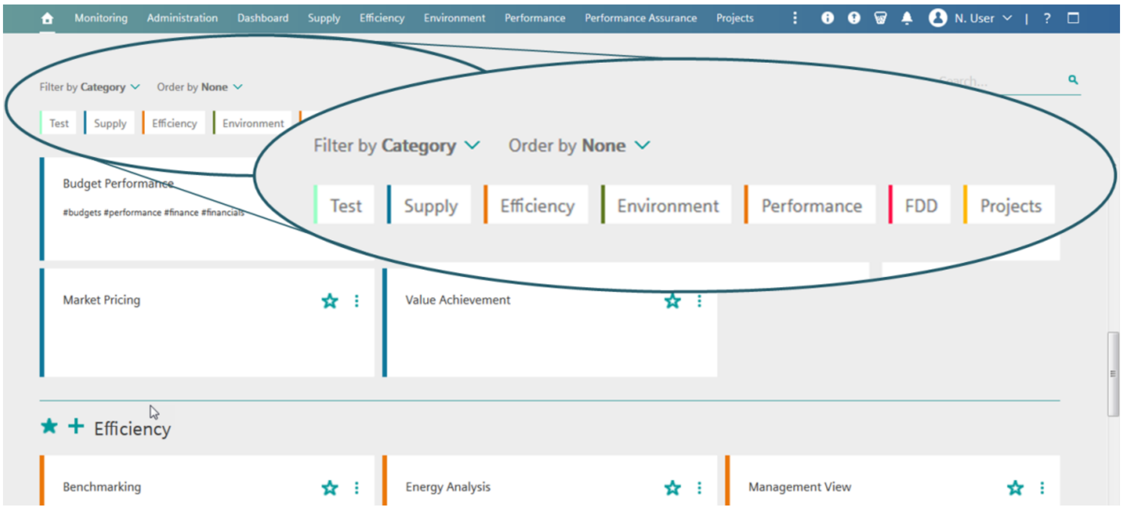


7.4 Filter function

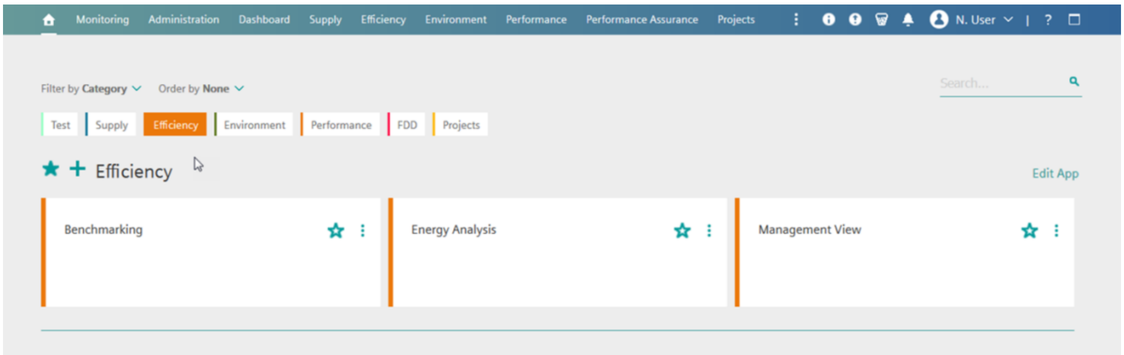
You can filter by different options to simplify a search for a particular **App**:



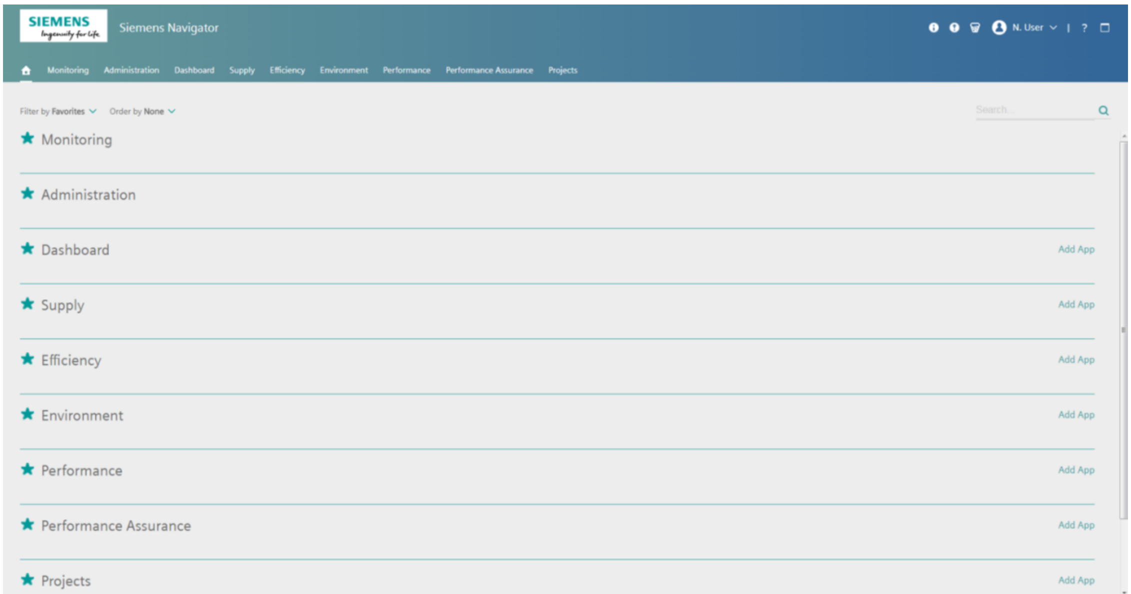
Select the option **Filter by Categories** and the categories control buttons are shown.



Clicking the **Category** option opens an accordion of buttons allowing you to choose from the different **App** categories. The accordion of buttons is filtered according to their categories and color-coded for easy recognition.



Clicking the **Favorites** option gives you a list of all **Apps** and **Application Groups** that you assigned as **Favorites** in the **Common Toolbar.**



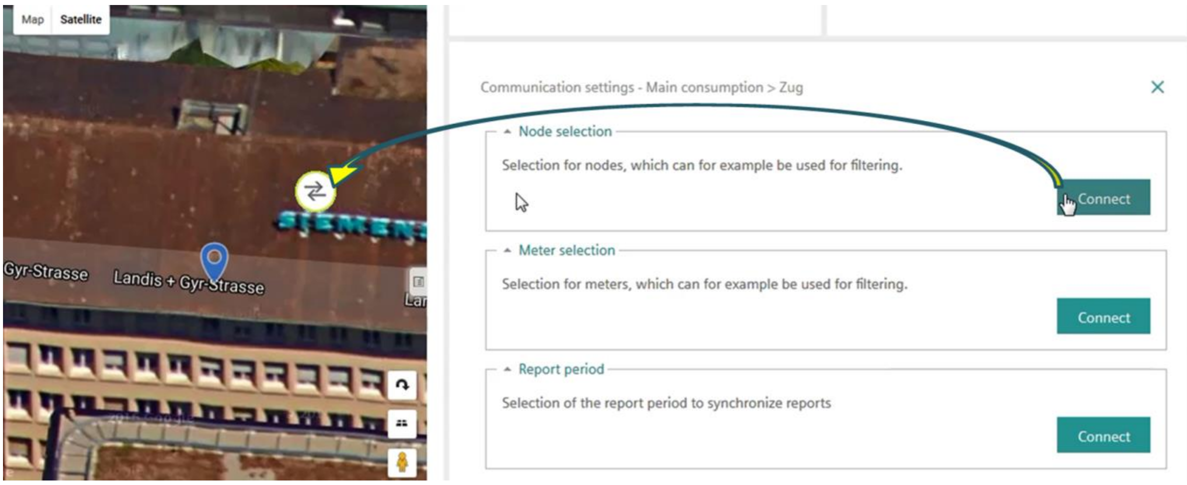
7.5 Widgets & views

7.5.1 Linking widgets

It is good practice to make one **Reporting** widget the primary widget by linking your other widgets to it and setting up through this one widget thus all adjustments made to this widget is automatically carried out in the connected widgets, for example the resolution period set in the primary widget is automatically followed by all the widgets connected to it.

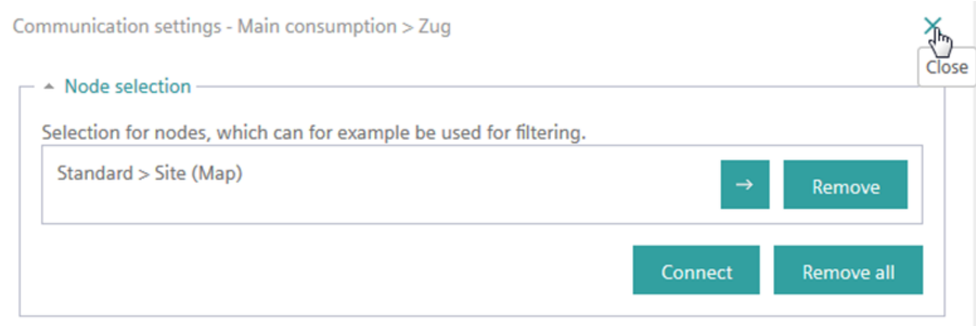
Click the **Reporting** widget's **Settings** icon ⋮ followed by the **Communications** button.

The **Reporting** view changes to the **Communication** settings - **Reporting** view: shown below. In **Node selection** click the **Connect** button then move (not drag) the cursor to the **map** or navigation tree or widget. In our example we use the **map**. The cursor changes when it crosses the boundary into the **map** widget thus:

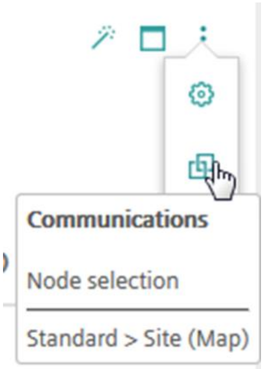


Click once to confirm the connection when the cursor changes.

The **Node selection** changes to indicate the node to which it is linked. Click the close settings icon ✕ to return to the **Reporting** widget view

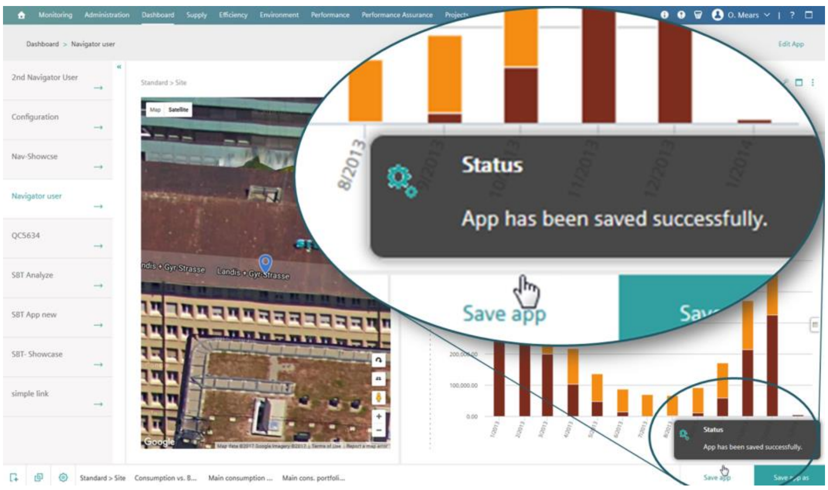


Point the cursor at the **Communications** button and a list of nodes linked to is shown.
In our example the site map



7.5.2 Saving an App

- Save your changes to an **App** by clicking the **Save App** button
- Select **Save view** as The **Save** view as text editor opens:
- Type a self-explanatory name into the text editor **View** name
- Click **Save** to confirm. The new **App** appears in the **App** navigation bar



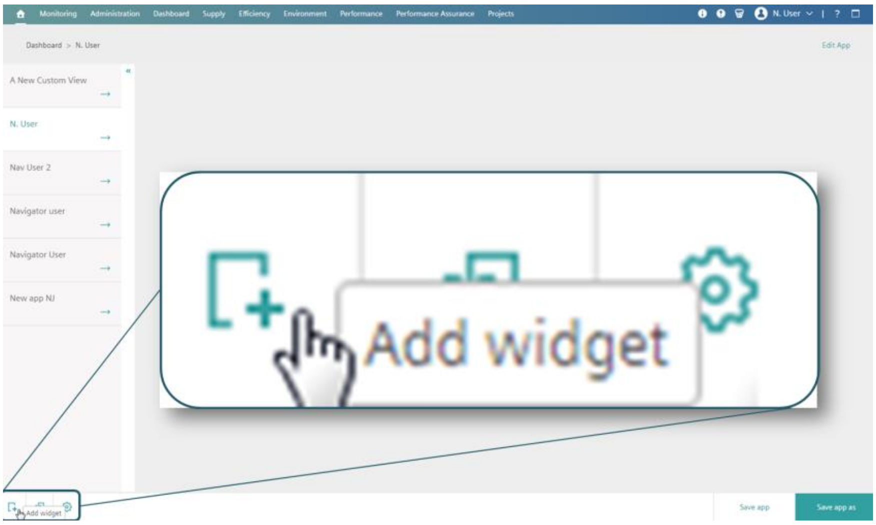
7.5.3 Renaming your App

To save an **App** that you have customized click **Save app as**
Type a self-explanatory name for your **App** into the **App name** editor starting with a # tag and click save.

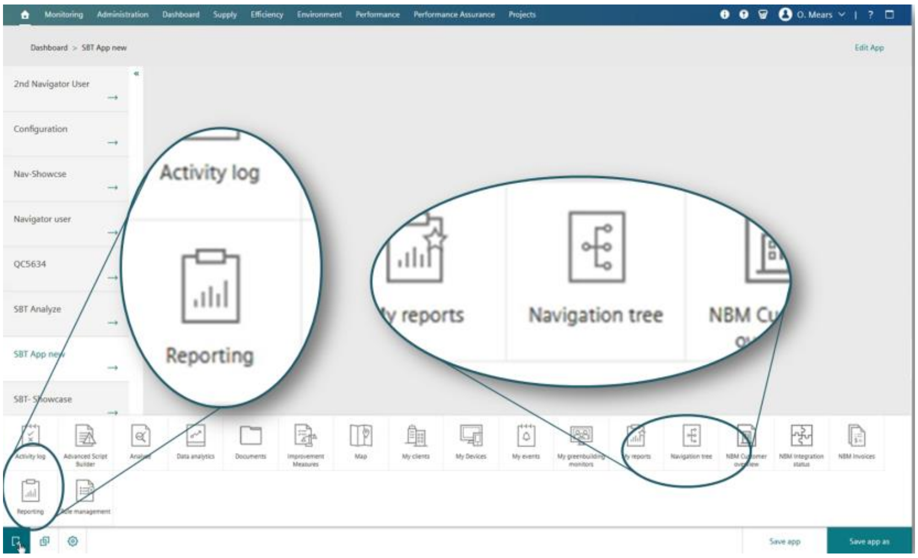
7.5.4 Add widgets to your App

When you have created an **App** in your Dashboard, the **App** is of course empty and must be populated with widgets. To do this carry out the following:

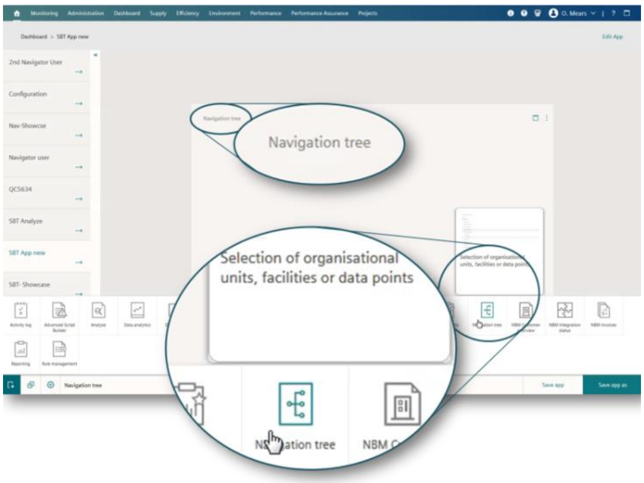
Click the **Add widget** button

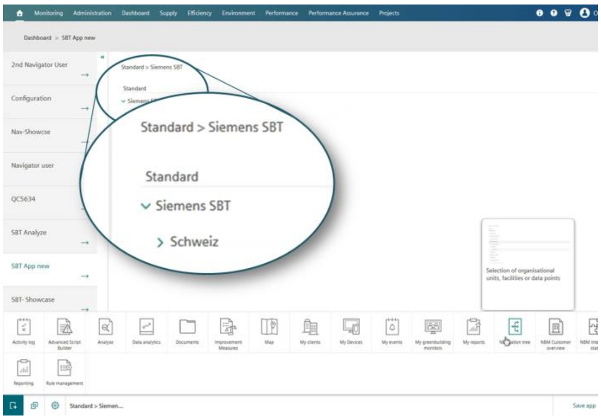


The **widget control** bar appears. Click the widget you want in your **App workspace,** for example the **Navigation tree** widget.



This **Widget tree** opens imme-diately to full size in the work space.



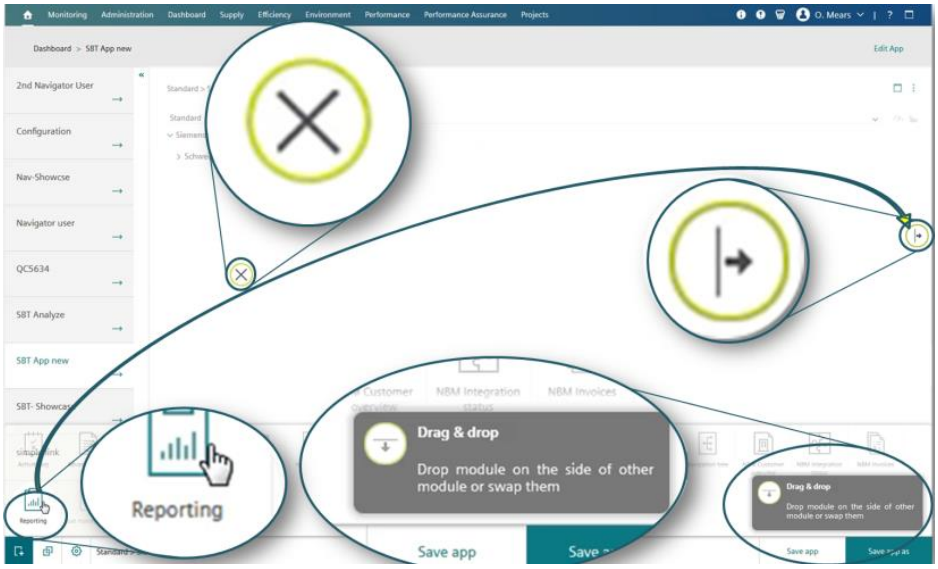


Add a second widget to your **App** by simply dragging the icon of the widget you want, for example the **Reporting** widget, to the approximate required position in the workspace.

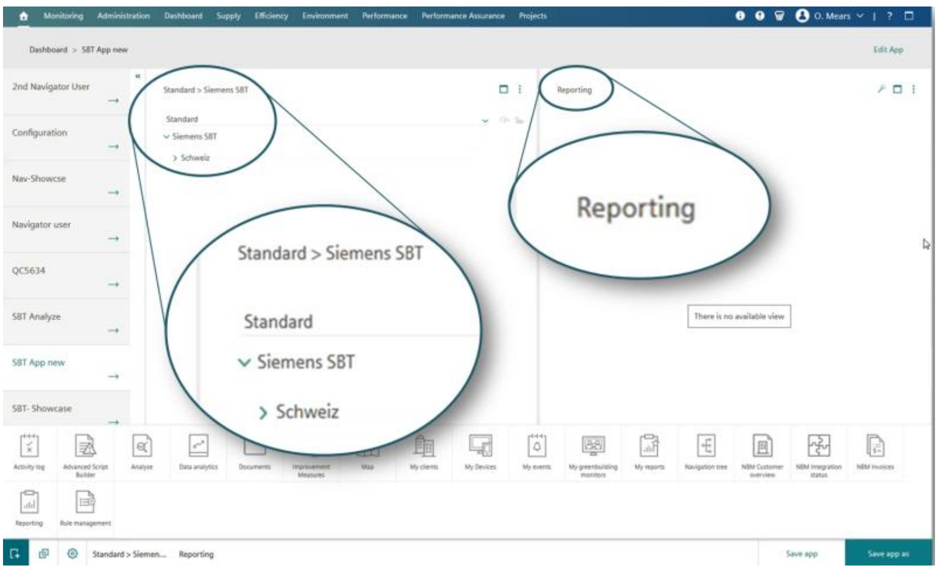
Once in the workspace the cursor changes thus while being dragged:

When it arrives at a place where it can be dropped it changes thus:

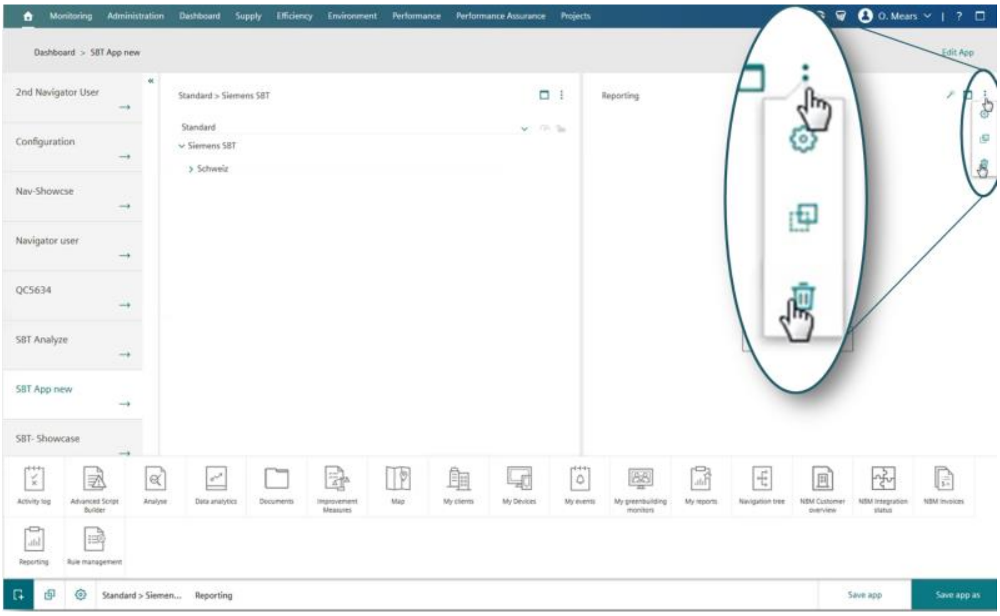
Now you can drop it in place.



There are now two widgets in the **App workspace.**



To delete a widget click the **Settings** icon ⋮ to open the widget controls. Click the **Trash** icon.

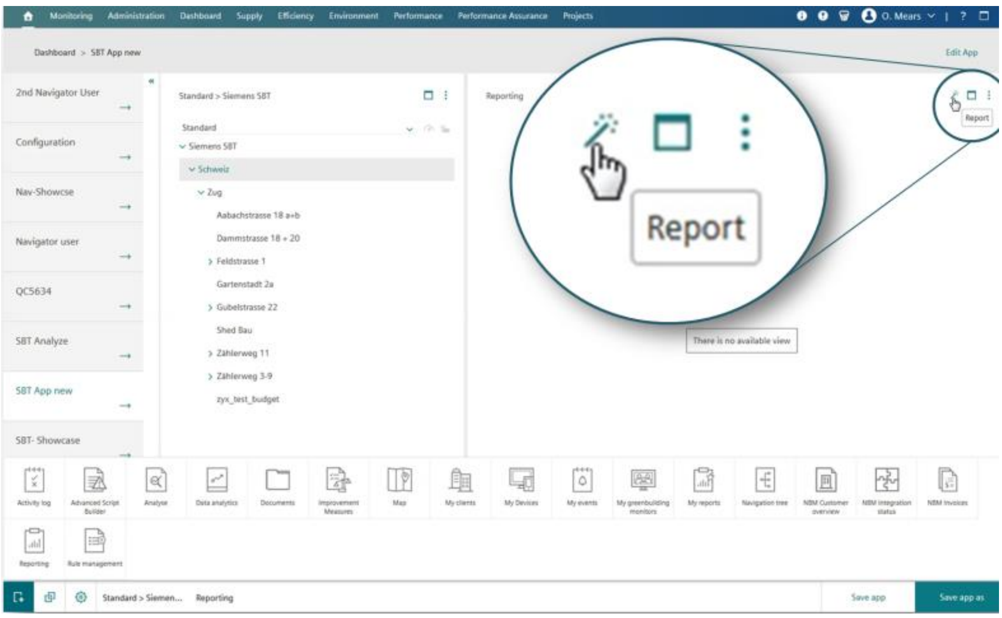


7.6 How to configure a widget:

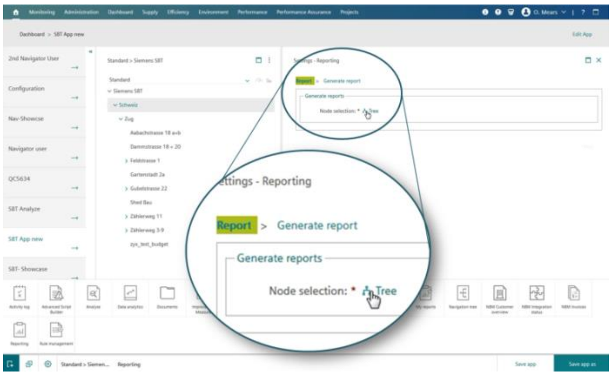
Once the selected widgets have been created and saved within the **App**, The widgets are now ready for configuration

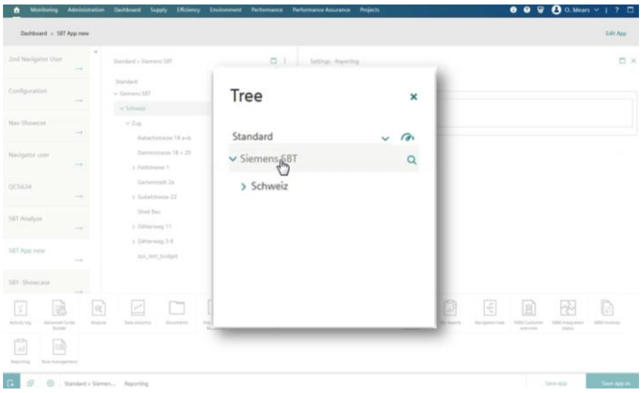
Following the steps to create the report will differ depending on the report you have selected.

Click the **Reporting** widget's **Report** button (it looks like a magic wand): You are directed to the **Settings – Reporting** view. Here you complete the information:

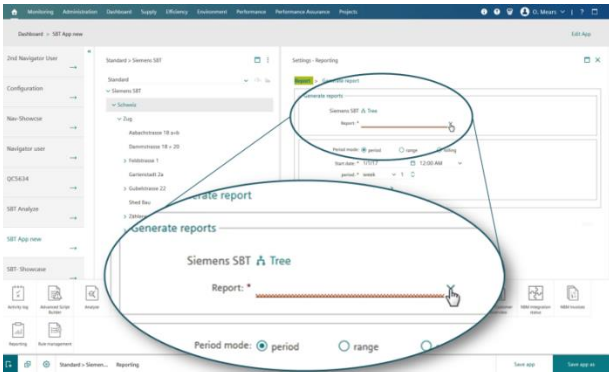


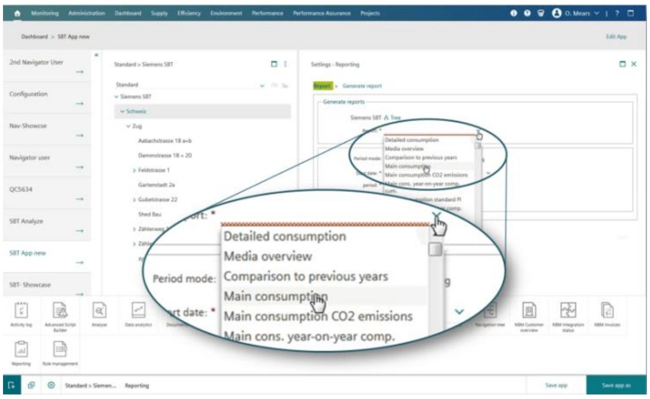
Click the **Node selection Tree** to set the required report level within the **Tree** structure





The **Generate reports** view opens. Select the report that you require from the drop-down list.

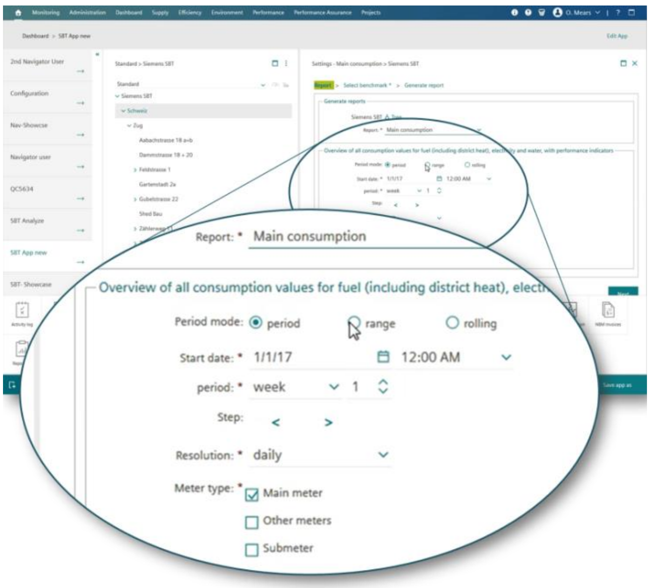




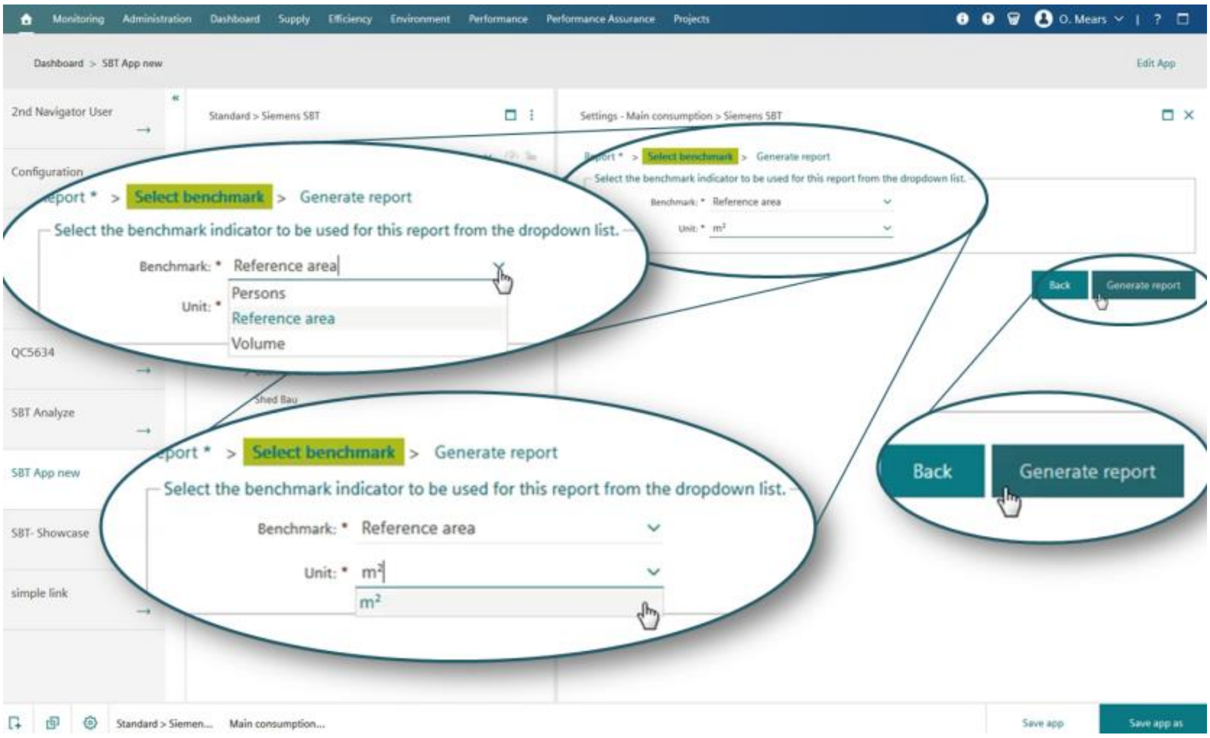
Under **Generate Reports** set the following:

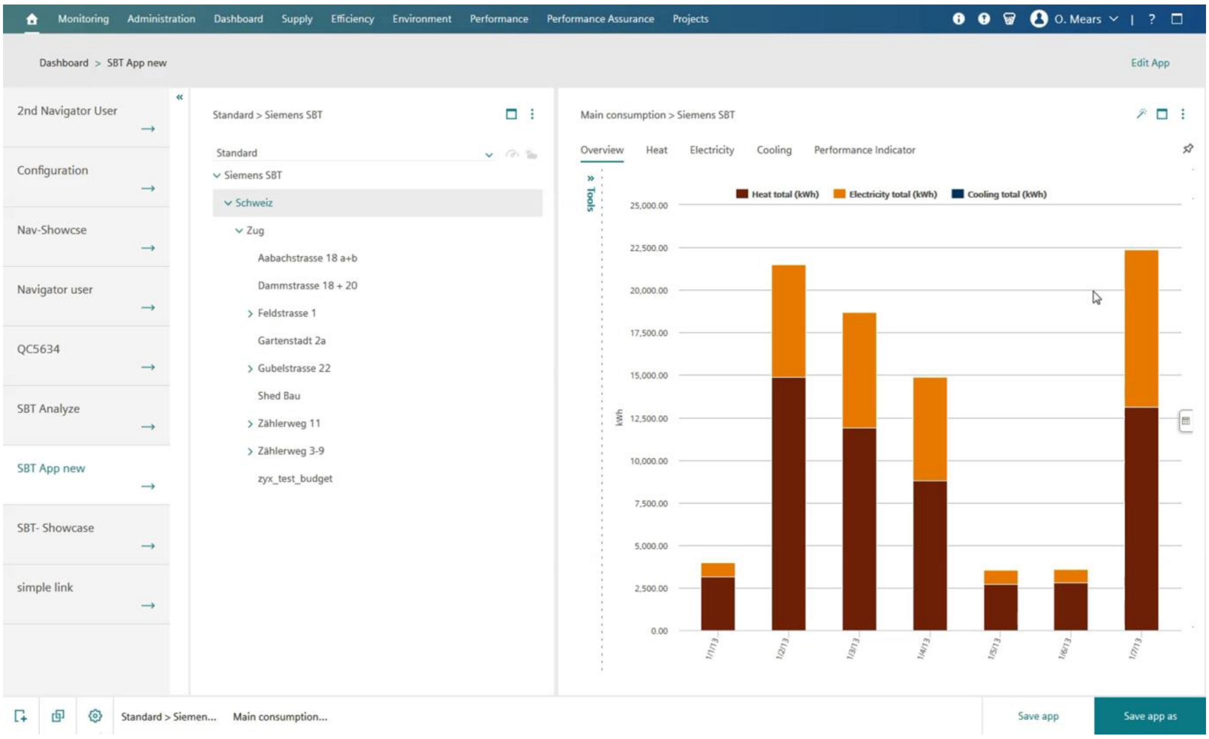
- Period mode
- Start date
- Period
- Resolution
- Meter type

Click **Next**



Under **Select benchmark** make your benchmark settings and click **Generate report.**





Chapter 8. Multi-Dimensions

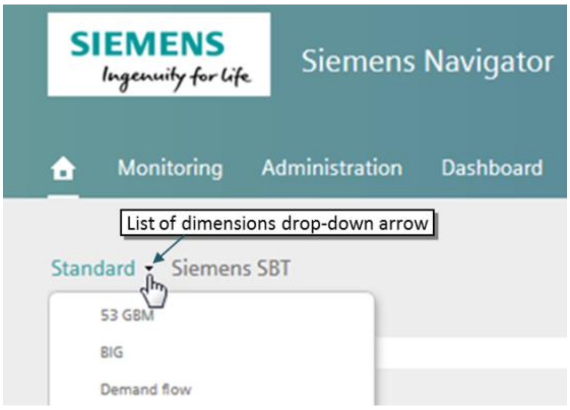
The multi-dimensional feature allows you to see the different **Context node** structures. Click on a differ-ent 'Dimension' and the current **Context node** structure is replaced in the view with a **Context node** structure based on the criteria of the dimension chosen. You can change the views according to the **Context node** structure that you want to see.

Follow the steps below to select the dimension you wish to view:

Step 1. Click the home button

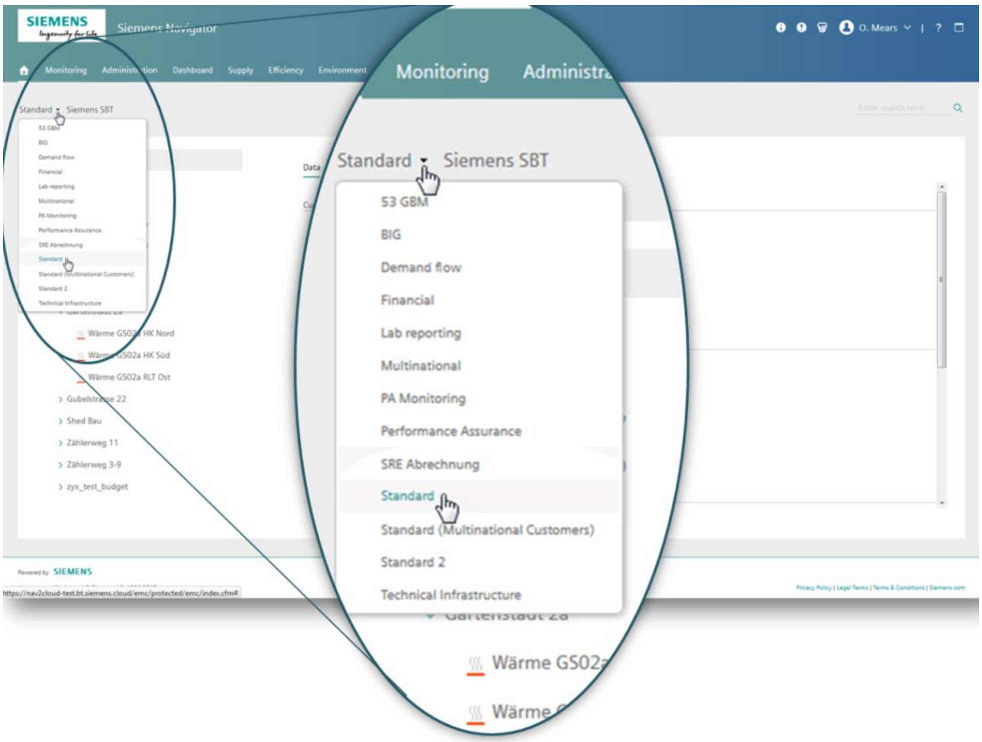
Step 2. Click the **Assets** App

Step 3. Click the list of dimensions drop-down arrow



Step 4. Select the dimension you wish to use from the drop-down list.

The **Context node** structure changes to the selected view in the **Asset tree.**
Example: Select the available Dimension from the drop down box



SIEMENS

Chapter 9. Asset tree view vierarchy

The **Asset tree view** contains all of your data points and allows you to navigate through your data in an organized fashion.

Navigator has several different node types to visualize your data. The following is a display of the levels and their names:

Customer: Highest level node context, which displays the name of your company or organization.

Country: This node type is used as an additional node type for re-porting. (This is only available when using a Multinational di-mension and is used for compar-ison reporting).

There are other node types available here, for example **Business unit & Region.**

Building Pool: Typically a town, urban district, or is geographical-ly where a number of sites are located.

Site: Usually comprises a num-ber of separate buildings with all of the objects contained within the site grouped together.

Object: Typically an individual building belonging to a site. However, it can also represent an organizational unit or cost center.

There are other node types available here, for example System **Subsystem & Equipment.**

Element: Any specific part of an object.

Sub elements 1 & 2: Are used for supply (supplier and utilities and then cost and account meters).

Meter: A physical point of measure.

Chapter 10. Generating reports

Within Navigator you can, generate and subscribe to energy consumption and comparison reports or en-vironmental reports.

You can generate **reports** for **individual meters** or for **nodes** (including any sub-nodes they contain), where meters of the same type are automatically summarized.

You can also subscribe to any report at a given interval. Favorite reports can be configured by all users and allow the option of having a report sent directly to their mailbox at a defined period.

10.1 Report output formats:

- **HTML:** The report is presented in a separate browser window, and is not downloadable. Optimized for quick, on-screen viewing.
- **PDF:** Depending on browser settings, the report is presented in a separate browser window or of-fered for download. Graphics are displayed on separate pages. Optimized for printing and archiving.
- **CSV:** The report is presented in a separate browser window, and can be downloaded and stored. Optimized for further use in other programs (presented without formatting in ASCII format), e.g. for import into databases and spreadsheets.

10.2 Generating a report

First select an object in the tree that you would like to report on, in our example a **Meter report.** Once you select an object the **Generate reports** option is shown on the right hand side.

Select the meter that you want a report on and click the **Generate reports** button. Select your meter from the meter drop-down list.

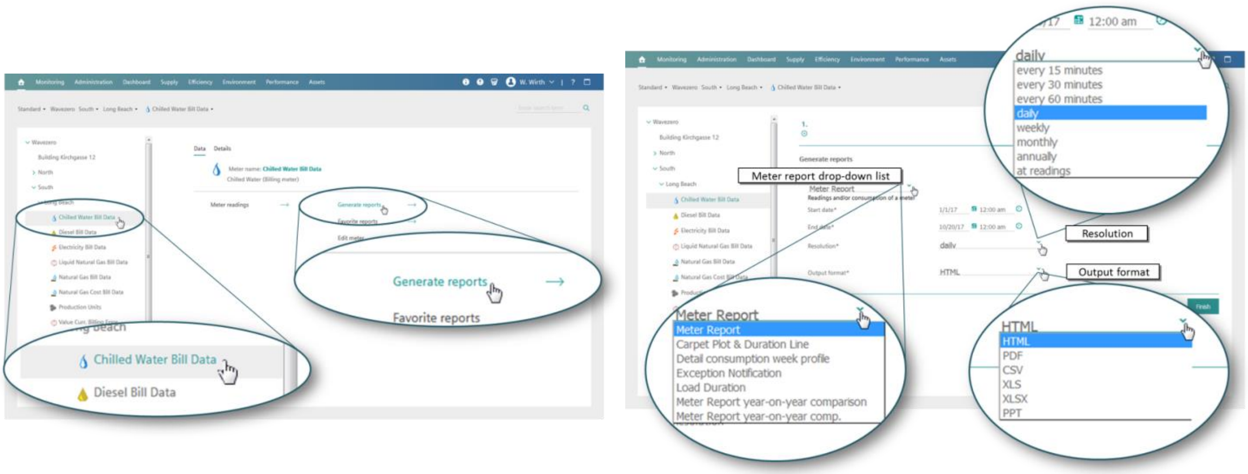
Enter the **Start date** and **End date** using the calendar editor to select the report period.

Mandatory settings are marked with an **asterisk** (*).

Set the **Resolution** i.e. the regu-larity of reading times within the generated report, daily, weekly, monthly, etc.

Set the **Output format** (examples see above).

Click **Finish.**



The report is presented in a separate window and offered for download.

10.3 Understanding Consumption and Comparison Reports

There are many report types available within Navigator. For the purpose of this document we will show the two basic report types **Consumption Reports** and **Comparison Reports.**

10.3.1 Consumption Reports

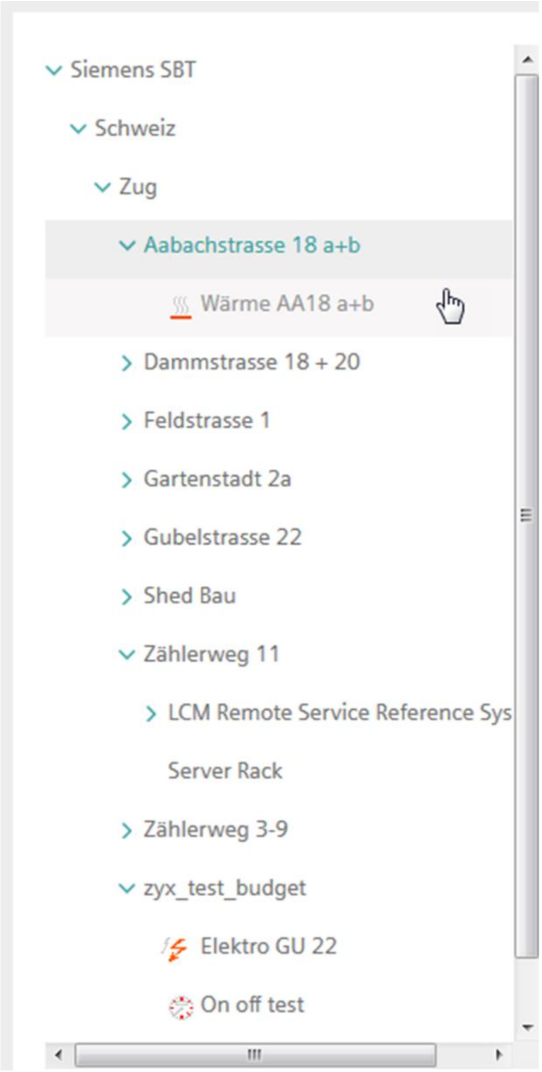
Consumption reports aggregate/sum-up data below the object you have selected in Navigator's **Tree View.** For example, if you select a **Site** and **Sub-meters** you sum up all **Sub-meters** within that site into a single report.

If you click the **Aabachastrasse** object and run a report you ag-gregate all the data from the meters within it. In this case just **Wärme AA18 a+b.**

Should you wish to run a level higher in the tree simply click that level for example, if you click the **Schweiz pool** you ag-gregate all data for all sites found within the **Schweiz pool.**

The most common consumption reports:

- Main Consumption
- CO2 Emissions
- Detailed Consumption
- Electricity Load Profile Day, Week, Month, Year



Example: **Main consumption** report (Consumption Overview Report US)
First select an object in the tree that you would like to report on. The **Generate reports** option is shown on the right hand side. Find the **Main consumption** report. Click **Generate reports.**

Mandatory settings are marked with an **asterisk** (*).

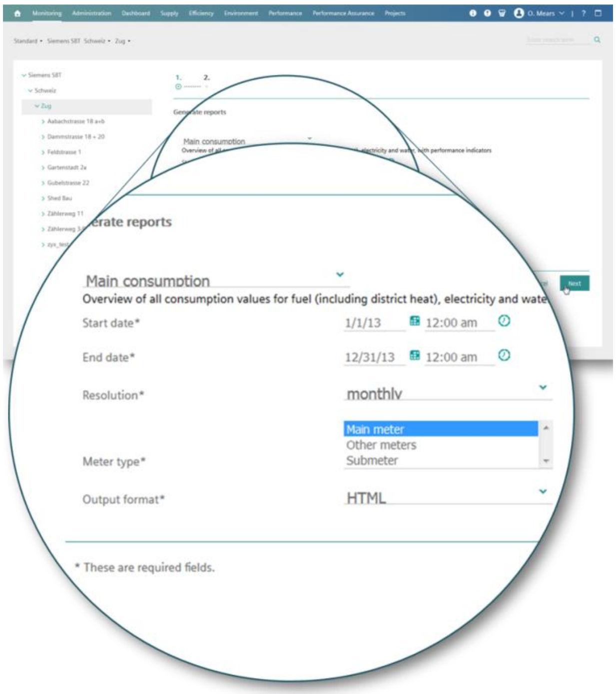
Enter the **Start date** and **End date** using the calendar editor to select the report period.
Set the **Resolution** i.e. the regularity of reading times with-in the generated report, daily, weekly, monthly, etc.

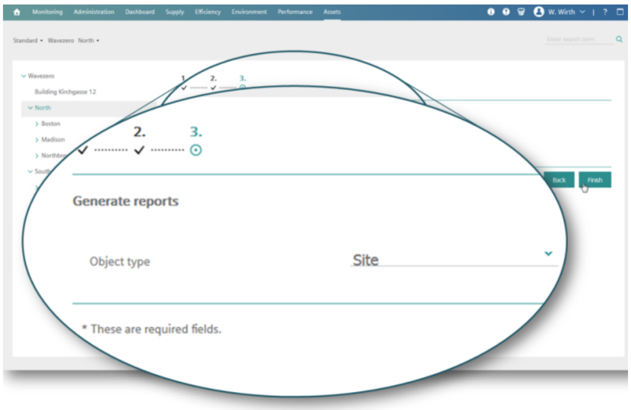
Set the **Meter type.**

Set the **Output format** (examples see above).

Click **Next.**
Keep reference area in m2/ft2, and click **Finish**. If there is m2/ ft2 entered into Navigator then the main consumption will pro-vide energy per m2/ft2.

The report is generated.





Report Note: Some reports will provide different resolution options this depends on the report, rolling and static are examples of this and are explained below.

- **Rolling** - Reports use today's date in combination with the period. If the period of the report is less than the time from the start date, then the start date is taken as today's date period.
- **Static** - Reports will have the resolution taken from the start and end date period.

Example of generated report Main consumption

Main consumption

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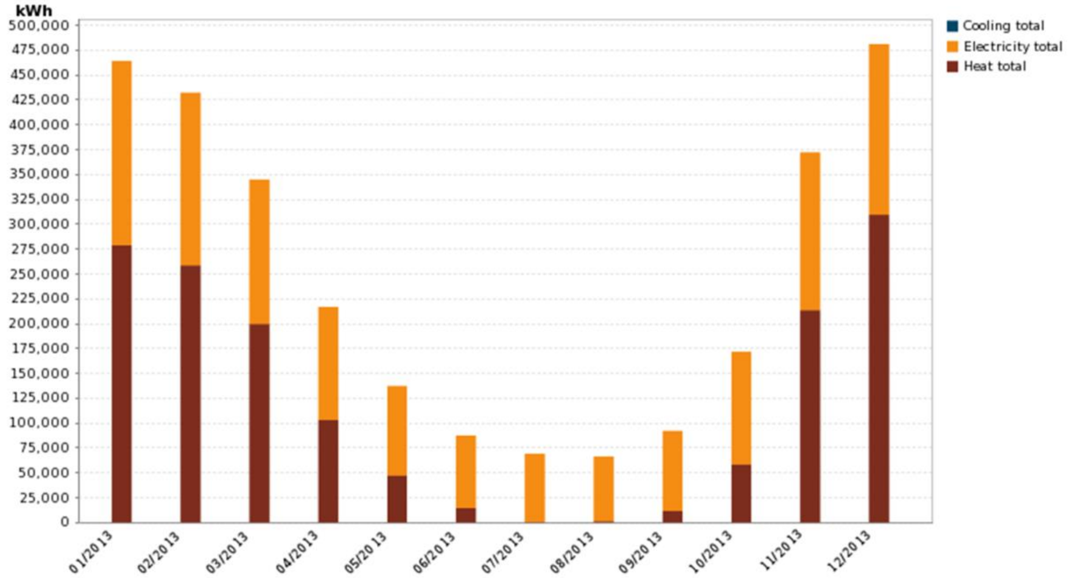
Organisation **Siemens SBT**
Node **Zug [Main meter]**
Path **Siemens SBT > Schweiz > Zug**

Start date **1/1/13 12:00 AM**
End date **12/31/13 12:00 AM**
Resolution **monthly**

Overview | Heat | Electricity | Cooling | Performance Indicator | Create PDF



	Date	Energy total	Heat total	Electricity total	Cooling total
		kWh	■ kWh	■ kWh	■ kWh
1	**01/2013**	463,985.40	278,930.00	185,055.40	0.00
2	**02/2013**	432,172.20	258,640.00	173,532.20	0.00
3	**03/2013**	344,910.40	199,650.00	145,260.40	0.00
4	**04/2013**	216,666.68	103,220.00	113,446.68	0.00
5	**05/2013**	137,143.08	47,440.00	89,703.08	0.00
6	**06/2013**	87,525.44	14,710.00	72,815.44	0.00
7	**07/2013**	69,048.80	660.00	68,388.80	0.00
8	**08/2013**	66,372.91	1,306.15	65,066.76	0.00
9	**09/2013**	92,080.15	11,603.85	80,476.30	0.00
10	**10/2013**	171,651.70	58,580.00	113,071.70	0.00
11	**11/2013**	372,030.30	213,580.00	158,450.30	-
12	**12/2013**	481,089.00	309,510.00	171,579.00	-
	Sum	**2,934,676.06**	**1,497,830.00**	**1,436,846.06**	**0.00**
	Average	**244,556.34**	**124,819.17**	**119,737.17**	**0.00**

Report generated by Siemens Navigator (6.0 69-)

Creation date: **10/20/17 5:12 PM** Created by: **Mears, Owen**
Main consumption

1. Headers - Shows Report Name, Start/End date, Resolution, and Node Level.
2. Overview and Media Tabs

- Provides an overview of all media chosen for main consumption meters and shows all energy types converted to a measuring unit in order to stack consumption for the specific time period.
- Performance Indicator Tab – Gives consumption per square foot (Square foot must be included within the property of the node).
- Create PDF – The **Create PDF** button is at the top of all HTML reports. This is useful for converting reports to PDF form to print/email/share with others.
- Sorting data – HTML reports are sortable by clicking on the green column headings in the table.

3. Headers - Shows Report Name, Start/End date, Resolution, and Node Level.
4. Overview and Media Tabs

10.4 Comparison Reports

Compare specific data points or objects within the tree. For example, if you select a building pool you can compare all the sites within the building pool.

If you run a comparison report on the **Site Zug** you are able to compare all the objects that are within that specific node from **Aabachstrasse** through zyx_test_budget.

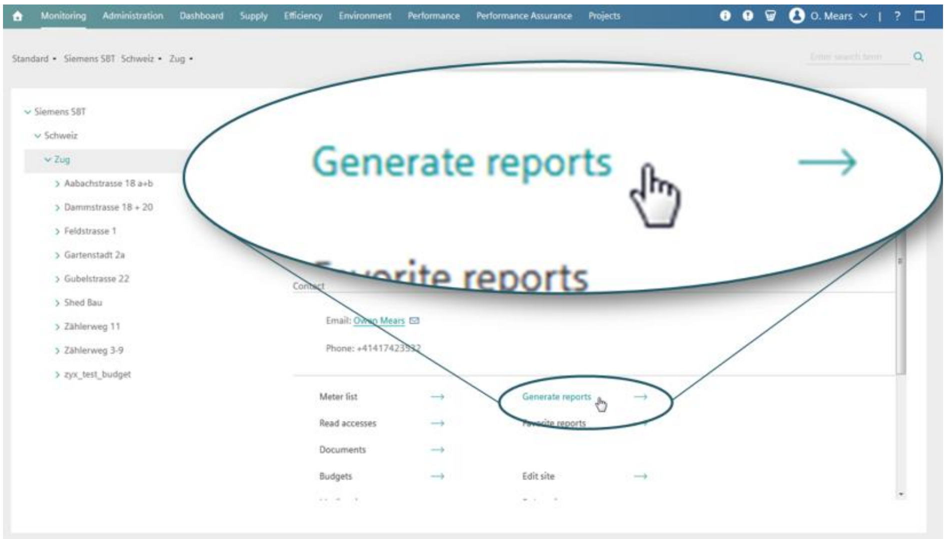
Most Common Comparison Reports:

- Detailed Consumption Week Profile Portfolio Compare Standard PI
- Meter Compare Trend Portfolio Compare
- Portfolio Compare CO2
- Portfolio Budget
- Portfolio Budget Cumulative
- Portfolio Cost Budget
- Energy Star Score Tend
- Portfolio Compare Energy Star Weather Normalization
- Demand Flow Plant Performance

Example: Portfolio Compare Report

Begin by selecting a building pool in the tree that you would like to report on. Once selected, the **Generate reports** option is shown on the right.

Click **Generate reports.**



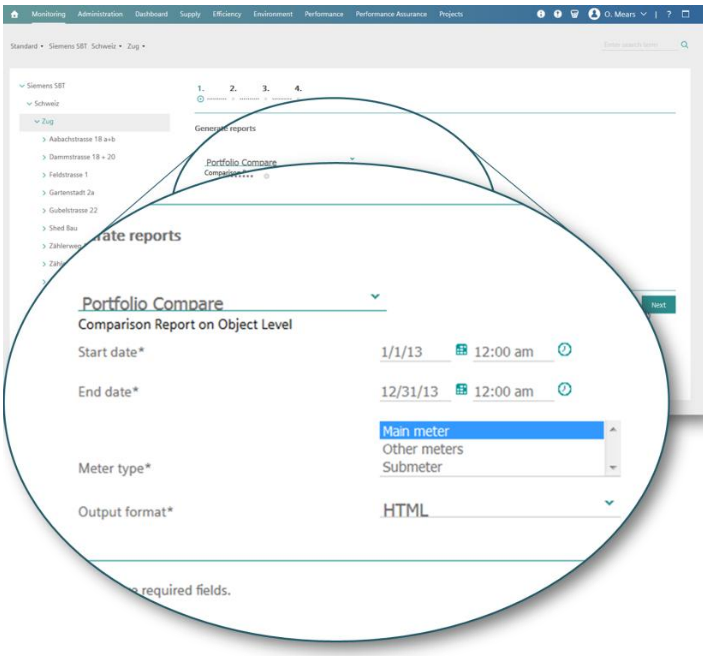
General report information re-quired for all report generation:

Step 1. In the drop down menu select **Portfolio Compare** report.

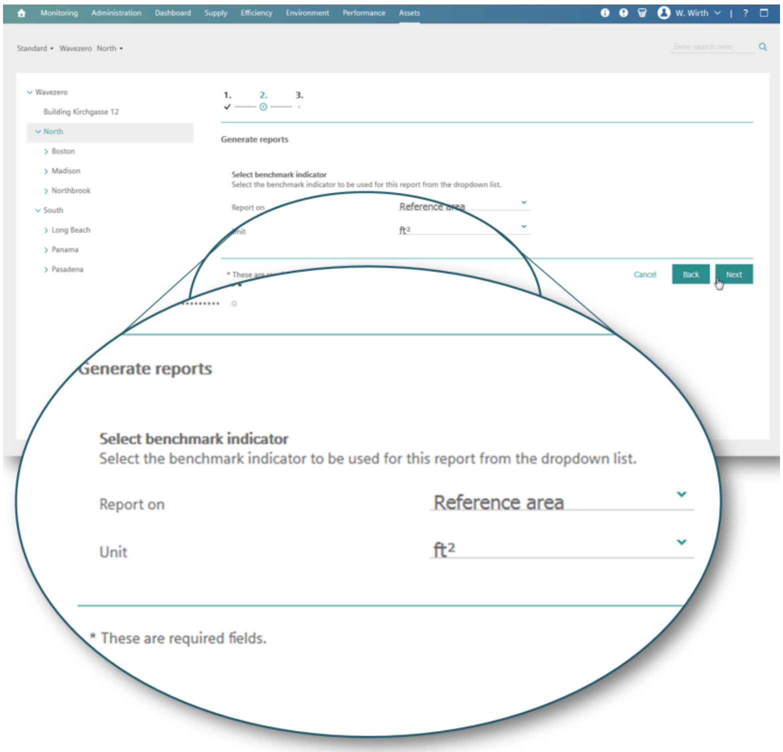
Step 2. Select **Start** and **End date.**

Step 3. Select **Meter type** (This will take into consideration only these meters for this report).

Step 4. Select **Output format** (HTML, PDF, CSV, XLS, PPT).

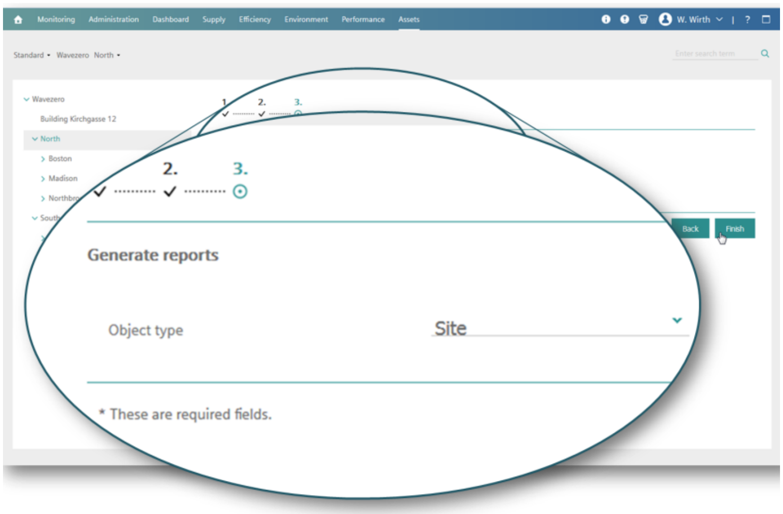


Step 5. Select **KPI** (Reference Area in ft2)



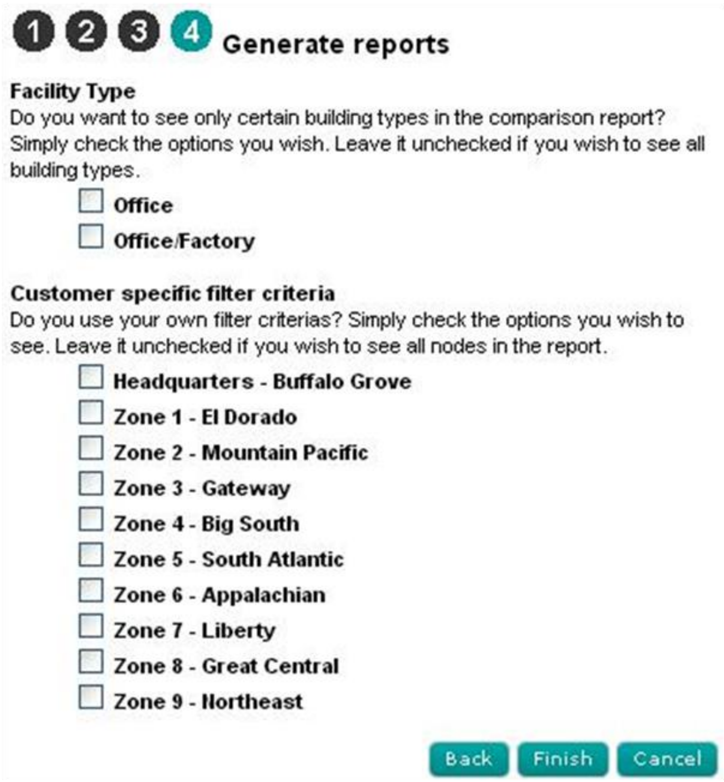
Step 6. Click **Next**

Step 7. Select the object type – refers to the comparison of the building pool node, the site node, the object node or the element node.

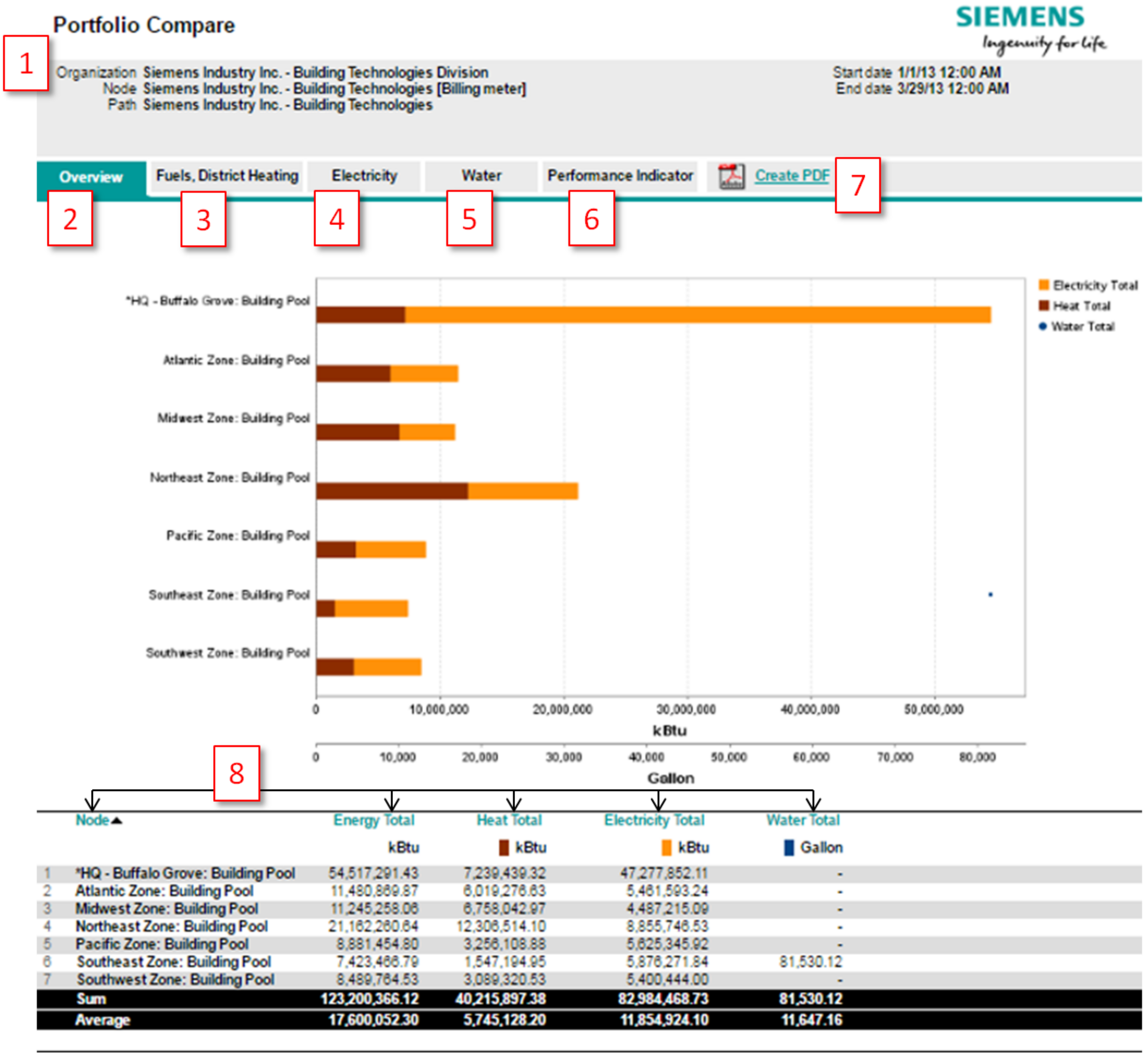


Click **next.**

Step 8. Select **filter type** – If this is configured for your account you can filter specific building types for your report. You can pick and choose which buildings you want to see based on the filter that is applied to it. Filters must be set up in the site node for this selection. If you do not select any filters, all applicable buildings will appear in the report.



Step 9. Click **Finish.**



	Node ▲	Energy Total kBtu	Heat Total kBtu	Electricity Total kBtu	Water Total Gallon
1	*HQ - Buffalo Grove: Building Pool	54,517,291.43	7,239,439.32	47,277,852.11	-
2	Atlantic Zone: Building Pool	11,480,869.87	6,019,276.63	5,461,593.24	-
3	Midwest Zone: Building Pool	11,245,258.06	6,758,042.97	4,487,215.09	-
4	Northeast Zone: Building Pool	21,162,260.64	12,306,514.10	8,855,746.53	-
5	Pacific Zone: Building Pool	8,881,454.80	3,256,108.88	5,625,345.92	-
6	Southeast Zone: Building Pool	7,423,466.79	1,547,194.95	5,876,271.84	81,530.12
7	Southwest Zone: Building Pool	8,489,764.53	3,089,320.53	5,400,444.00	-
	Sum	**123,200,366.12**	**40,215,897.38**	**82,984,468.73**	**81,530.12**
	Average	**17,600,052.30**	**5,745,128.20**	**11,854,924.10**	**11,647.16**

1. **Header** – Displays report name, start/end date, resolution and node context.
2. **Overview tab** – Shows all energy types (electricity and heat totals) converted to a common unit of kBtu in order to stack consumption for the specific time period
3. **Fuels, district heating tab** – Only shows gas in units of MMBTU
4. **Electricity tab** – Only shows electricity in units of kWh, this report is run on the main meters so it gives a breakdown of on/off peak consumption
5. **Water** – here shown in gallons
6. **Performance indicator tab** – Gives consumption per square foot. (square foot must be included within the property of the node)
7. **Create PDF** – The **Create pdf** button is at the top of all HTML reports. This is useful for printing/emailing/sharing with others
8. **Sorting data** – HTML reports are sortable by clicking the green column -headers

Chapter 11. Favorite and subscribed reports

Favorite reports can be configured at the node or meter level. They allow the option of having a report sent directly to your mailbox at a defined period. Reports can be subscribed to in the form of hourly, daily, weekly, monthly, quarterly, half-yearly or annual e-mails. The reports are transmitted as PDF files for saving and printing, or in CSV format (ASCII) for further editing.

> The steps for the actual resolution for the report will differ as this depends on the report type for example to generate a main consumption report there are 3 steps, for a detailed consumption report there are 6. This does not alter the steps below.

Simple steps to create a favorite and a subscribed report:

Step 1. In the **Asset Tree**, click the desired node (such as a Pool) or meter. To the right of the **Asset Tree**, under the tabs **Data and Details**, meter (or node) specific information is shown.

Step 2. Under the **Data tab**, click **Favorite reports.**

Step 3. The **Favorite reports** table is shown.

Step 4. Click **Add**, the Favorite reports editor is shown, the edit box layout varies depending on the type

of report required.

Step 5. **Select** your report from the drop down box.

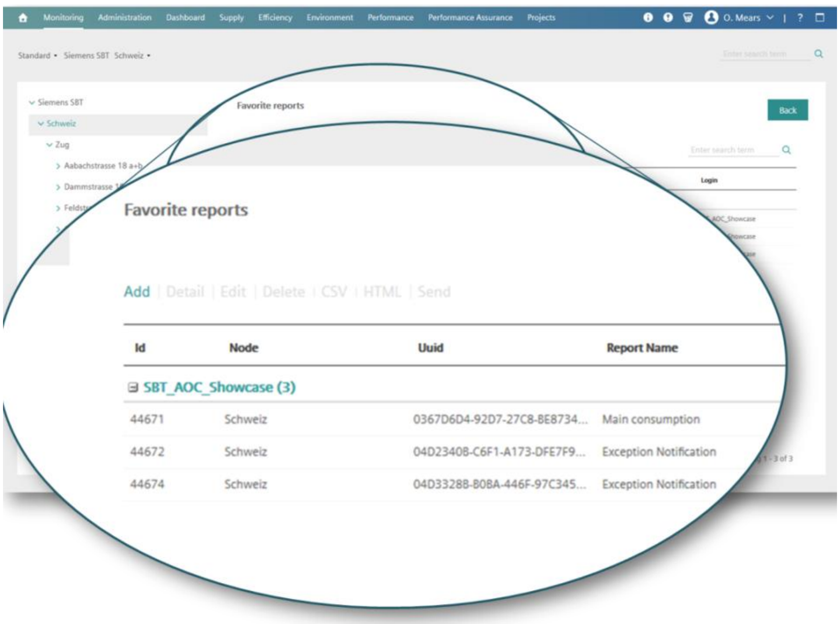
Step 6. Complete the fields up to the **Send** check mark box option (at this point you may decide to subscribe to this report for yourself and several other recipients) If yes go to step 7, if not click **Next** and move to step 8.

Step 7. Select **E-Mail** option (further options appear below) complete these options. To add a recipient, Click **Add** and an additional recipients window appears, insert e-mail address of all recipients.

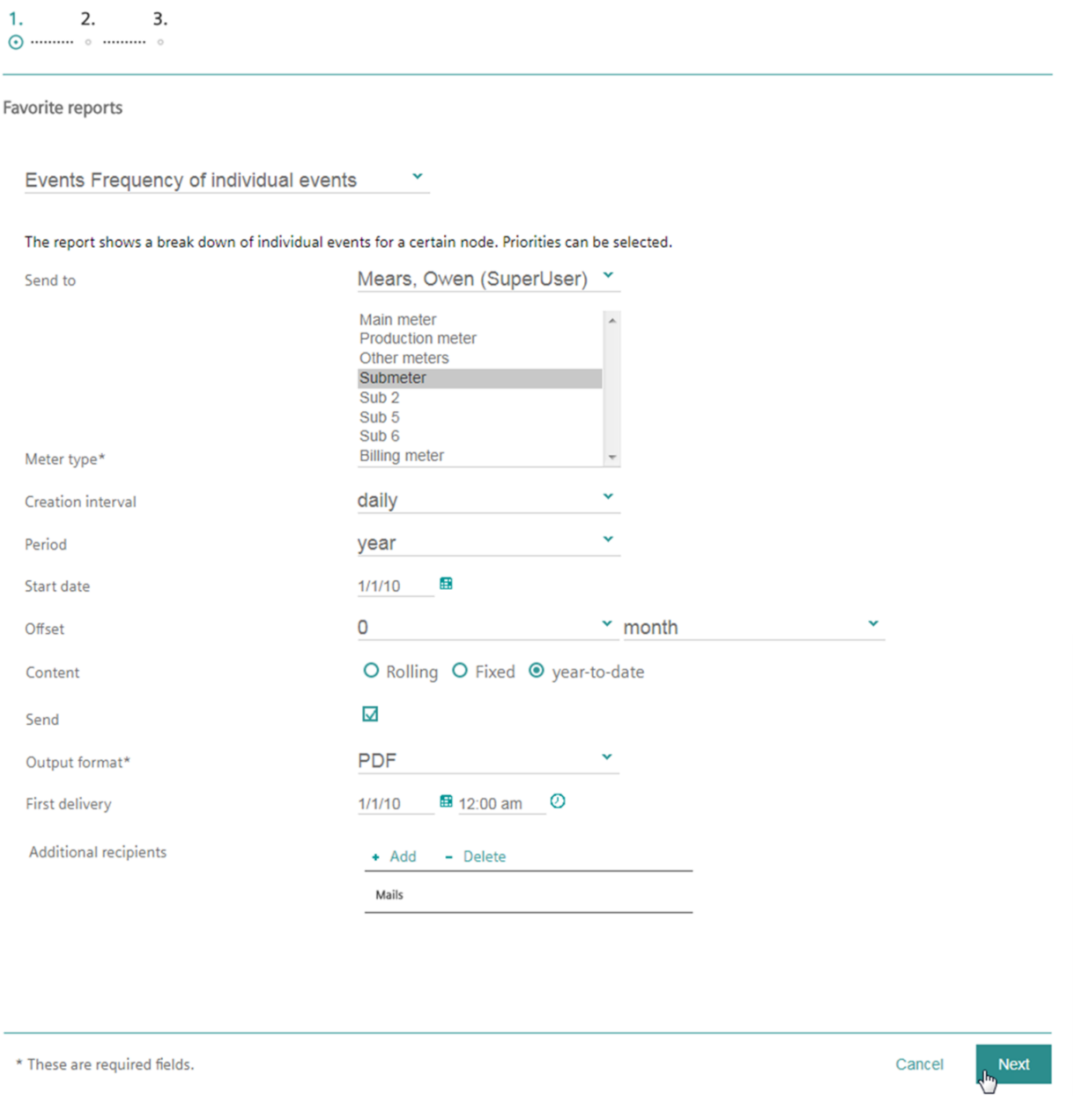
Step 8. Click **Next** after which the Select benchmark indicator is shown, make your benchmark settings and click **Next.**

Step 9. Make sure your settings are correct and click **Finish** (Window will return to **Favorite reports**).

Step 10. Your **new** favorite report appears in the **Favorite reports** table.



11.1 Favorite report options



- **Send to:** Name of the person to whom the report should be sent by e-mail. Various people can be selected depending on the role of the user adding the report.
- **Meter type:** Type of meter to be included in the report.
- **Creation interval:** How often should the report be generated.
- **Period:** For what amount of time should the report be created.
- **Resolution:** How often should the report be created?
- **Start date:** The date the first report should be generated.
- **Offset:** This only has an effect when the content is rolling. This configures the end date of the report. So if '1 month' is set then the end date will be today minus one month.

- **Content:** 'Rolling' reports use today's date in combination with the period. If the period of the report is less than the time from the start date, then the start date is taken as today's date - period. When 'Fixed' is selected, the period is always from the start date. From 'Year to Date' the period is always from the 1st January of the current year
- **Send:** Place a check mark here to send the report by email.
- **Output Format:** Defines the format of the report.
- **First Delivery:** Sets the date and time of the first delivery.
- **Additional recipients:** Here extra email addresses may be entered for users who wish to receive the report.
- **Deleting Favorites:** A favorite may only be deleted by the owner. This will remove the report for all users and the report will no longer be sent.

Chapter 12. Meters and entering meter cata

All meters in Navigator are tagged with a meter type to help report on the various data types. The available meter types and a brief description can be found below:

- **Billing meters:** These can be used to enter the consumption as reported in the utilities company bill.
- **Other meters:** Other meters register other consumption and media data (e.g. outdoor temperature).
- **Virtual Meter:** Often used to avoid installing a real meter for cost reasons, this meter does not physi-cally exist but represents a calculated value. You can define virtual meters as main or sub-meters.
- **Exchange meter:** Used for meters that need to be replaced on site, Navigator includes a meter replacement function, which allows you to document the process, at the same time ensuring the continuity of the data.
- **Multi-rate meters:** These are electricity meters with separate registers for power and consumption, or for different tariffs. Selecting one meter type will group the report to include only those meters. You can select more than one by holding shift and clicking on another type.

It is important to note that selecting more than one meter type (i.e. sub-meter and main meter) could result in double counting of your energy usage.

12.1 Entering meter data

There are two options to add meter data:

1. If you have a limited amount of data for a single meter.
2. Entering multiple meter readings where you have many readings for many meters.

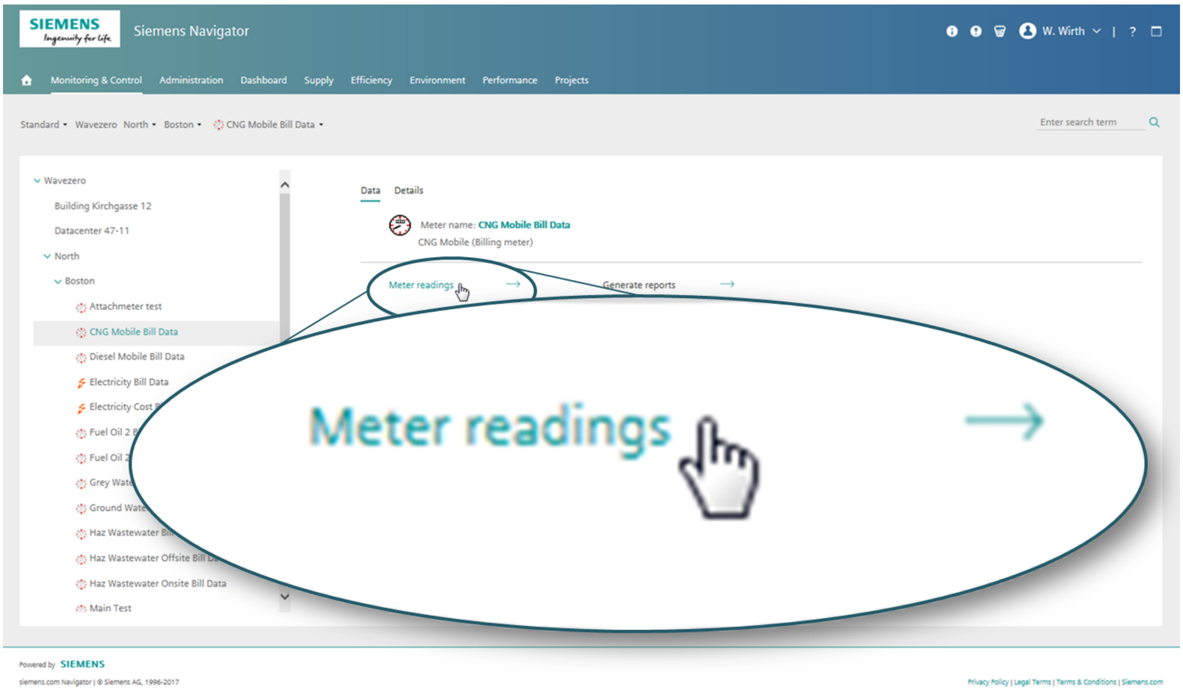
Entering manual meter readings:

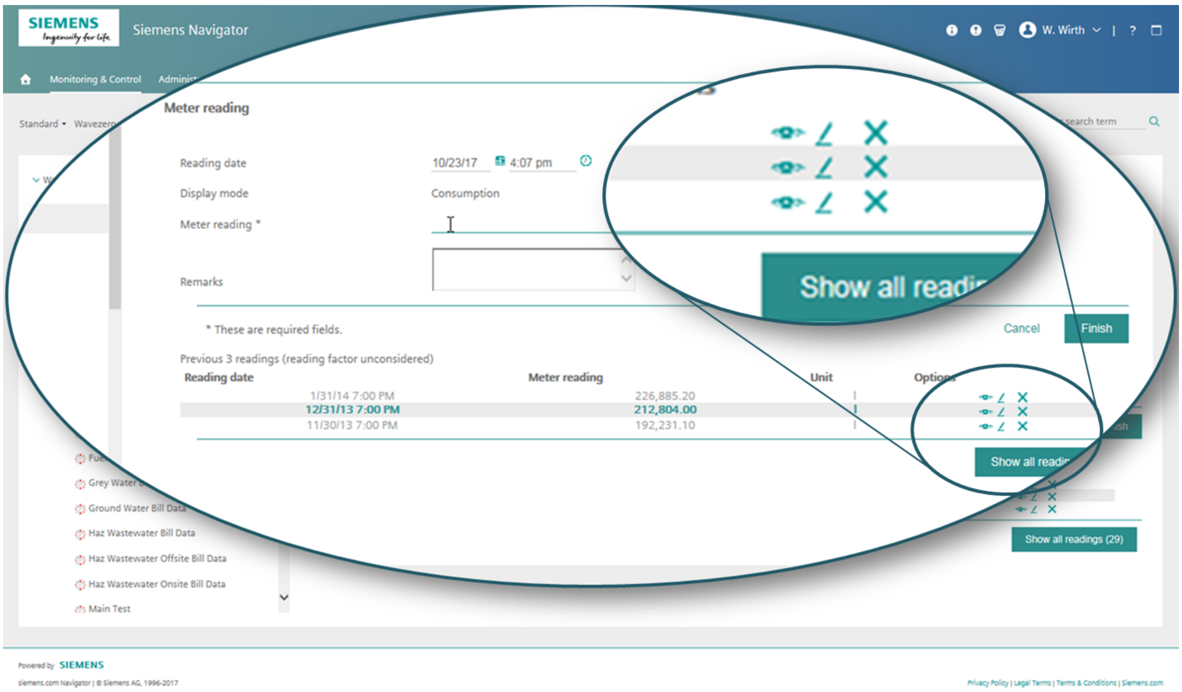
1. In the tree view, click the meter for which you want to enter a reading. It is then highlighted.
2. Click the Meter reading button on the right-hand side of the application workspace.
3. Select the reading date by clicking the calendar editor and then enter the Meter reading.

Click **OK** to add the entered value to the list of readings for the particular meter.
The system checks the entered value for plausibility. If not, a system message is shown.

Viewing meter readings:

4. To view a previous reading, click the eye icon symbolizing details under options.
5. If you want to view an earlier reading, first click **Show** all readings, then click the corresponding eye icon.





12.1.1 Editing a meter reading:

1. If you want to edit one of the last three readings, click the corresponding pencil icon symbolizing Edit under options. If you want to edit an earlier reading, first click Show all readings, then click the corresponding edit icon.
2. You can edit the reading date and meter reading.

Click **OK** to add the changed value to the list of readings for the particular meter. The system checks the entered meter reading for plausibility. If not, the system will present a message.

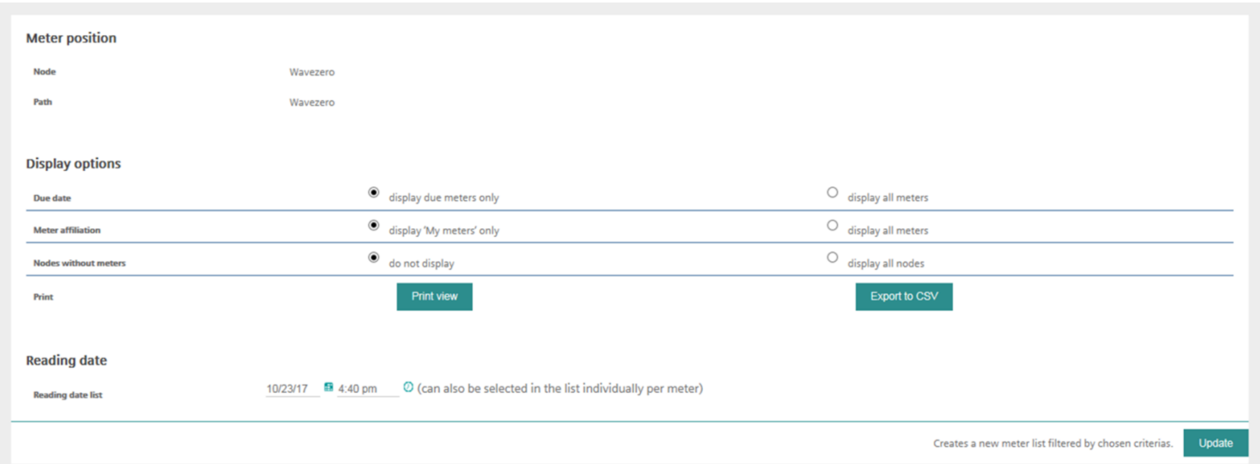
12.1.2 Deleting a meter reading:

You can delete readings from meters for which you have access rights. To delete one of the last three readings:

1. Click the corresponding delete icon (X) under options.
2. The warning "Do you really want to delete this reading?" is presented.
3. Click **OK** to delete the reading, or **Cancel** to stop it being deleted.

Entering Multiple Meter readings:

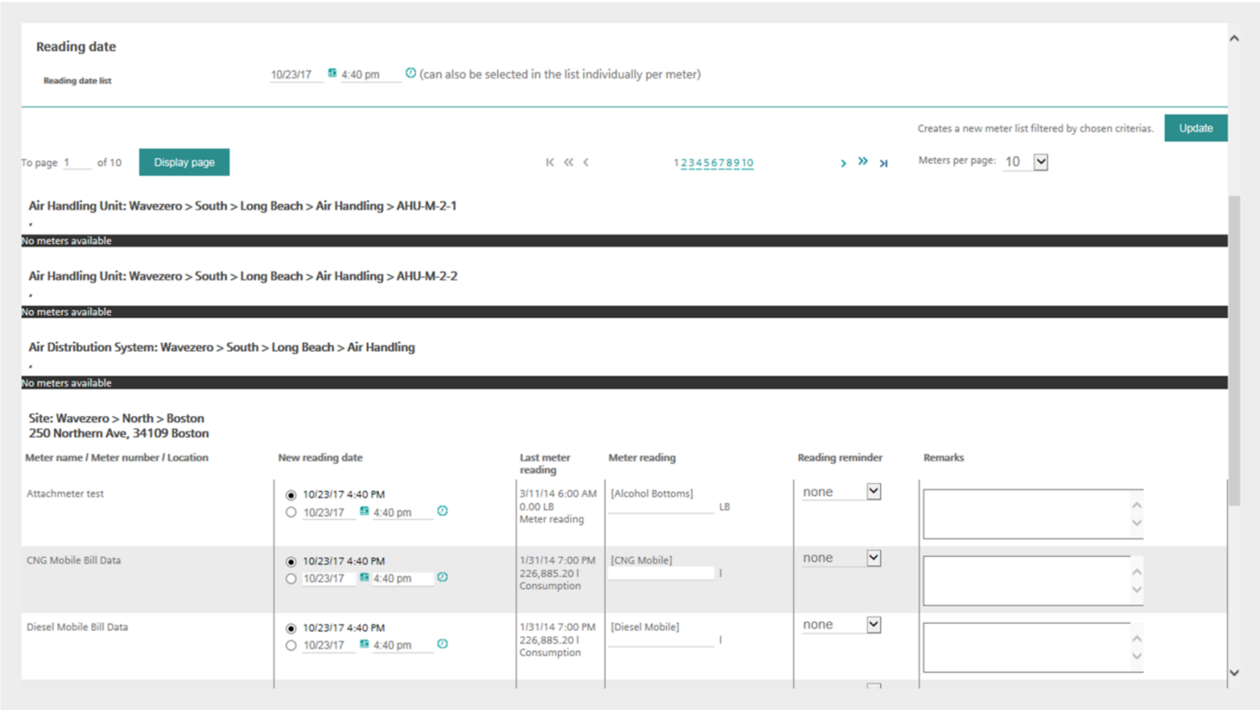
In the **Monitoring & Control App Group** click the **My Meters** App



- **Meter List:** Displays the name of and path to the selected node.
- **Display options:** This is an option button provided to select which meters you want to view (within the node you have selected).
- **Reading date:** You can select a reading date that applies to the whole meter list.
- **Due date:** Choose whether to list only meters that are due for reading, or to list all meters.
- **Meter affiliation:** Display **My meters** displays only the meters within the node for which you are the contact person, or you can click **display all meters.**
- **Nodes without meters:** These can be presented in the list or not (e.g. for the purpose of an overview).
- **Print:** Click the **Print view** button to display a printable view (DIN A4) of your meter list.

To insert multiple readings:

1. Click the calendar icon under **Reading date** to select a reading date that applies to the whole list. However, you can also define an individual date for each meter.
2. Click **Update** to apply the selected criteria to the displayed list.
3. For each node, the list indicates the node type (e.g. **Site**) as well as the node's path and address.
4. Enter your readings in the correct meter readings box.
5. Once you have completed this click **OK** found at the bottom of the page.



The first column shows the meter name and meter number (optional on entry). You can select an individual reading date for each meter: Click **Option** to the left of the date box in the new reading date column, and select a date, using the calendar icon.

- The date defined under **Reading date** (see above) applies to all other meters.
- The **Last meter** reading column shows the date and value of the last meter reading.
- You can enter a new reading for each meter in the Meter reading column.
- In the **Reading reminder** column you can define the reminder interval for each meter.
- **Remarks** are optional to enter.
- Click **OK** at the end of the list to confirm the entries. Click **Cancel** to discard the entries.

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