



Building EnergyCAP Reports and Dashboards



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Agenda



1. What questions are you trying to answer?
2. Finding the right report(s)
3. Build, run, and share reports
4. Seven popular reports
5. Watts Chat
6. Build and share Dashboards

What Questions are you trying to answer?

The more precise your question, the easier it becomes to generate report(s)

• What was my cost in 2025?

• What was my electric cost in 2025?

• What was my electric cost in 2025 by month?

• What was my electric cost in 2025 by month by site?

• What was my electric cost in 2025 by month by meter?

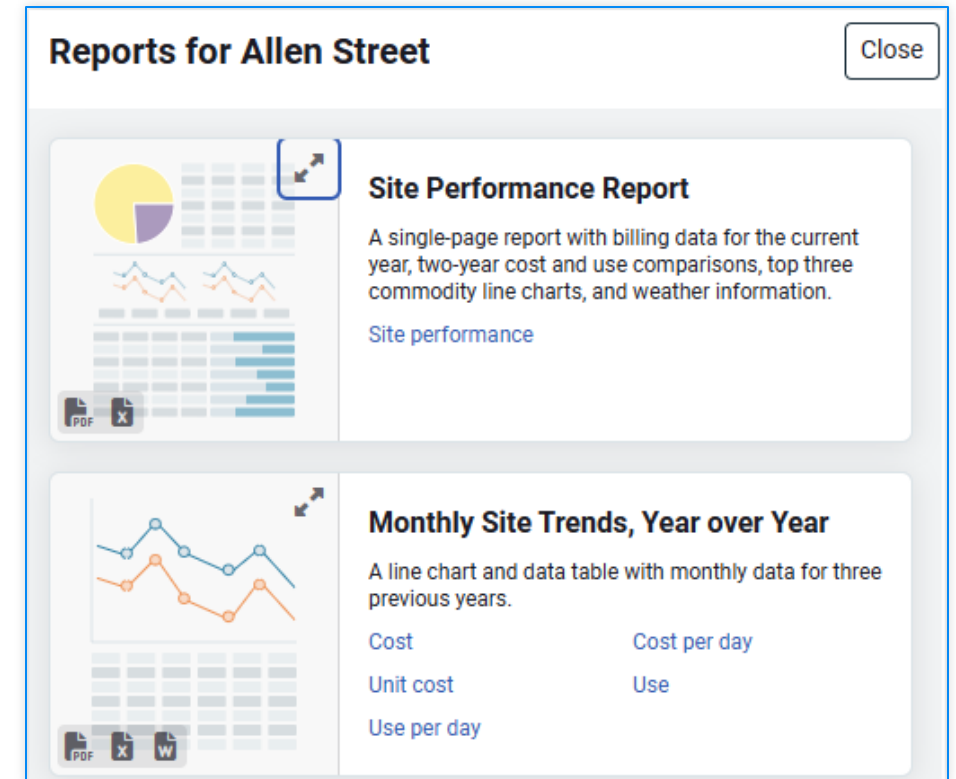
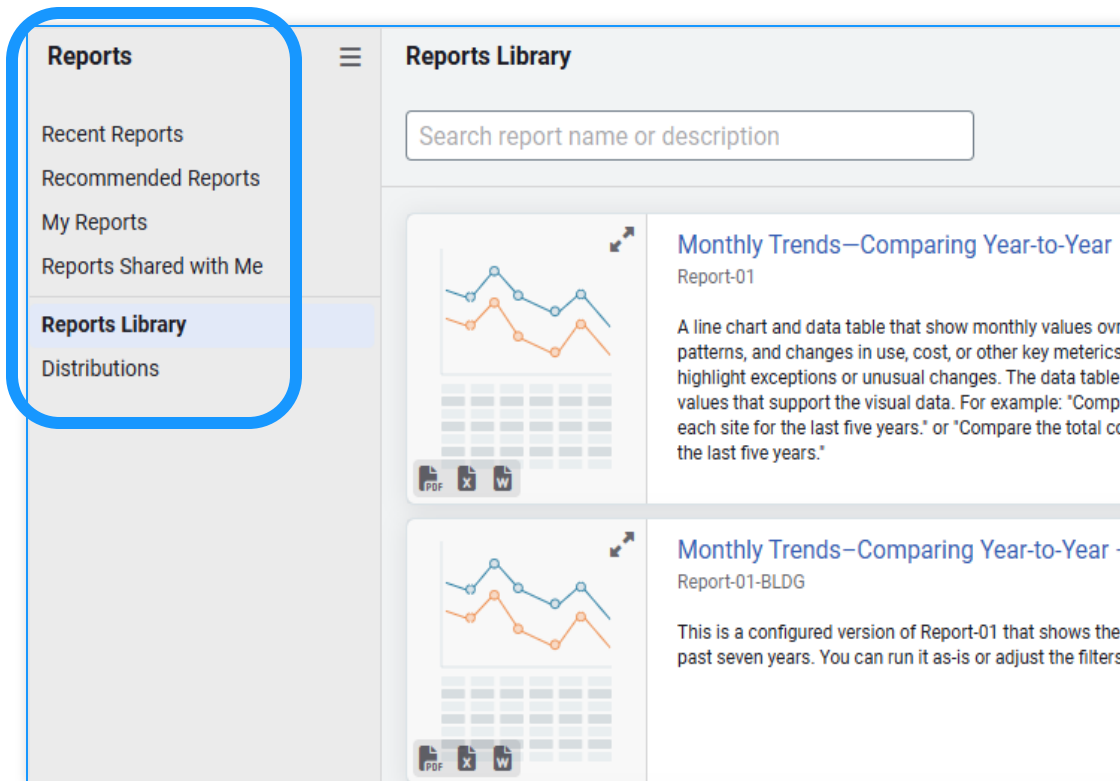
Filters are your friend

Billing period ⓘ	between ▾	January ▾	2026
		March ▾	2026
Color code period if allowable gap days ⓘ is	greater than	3	
Only include meters with color coded periods	equals	☒ Yes ☐ No	
Sort by	equals	Total days w/o bills ▾	
Account is active ⓘ	equals	☒ Active ☐ Inactive ×	
Commodity ⓘ	equals ▾	Electric ▾ ×	
Include active meters with no bills	equals	☐ Yes ☒ No ×	
Only include billing periods with missing days	equals	☒ Yes ☐ No ×	
Topmost place name ⓘ	equals	Happy Valley Center ▾ ×	

Tools to find the right report

The primary Reports module contains multiple methods to access reports. Each with its own strengths.

When viewing sites, meters, and accounts use “quick reports” in the upper right for context aware report suggestions.



Build, Run, and Share Reports

- Report Description / Instructions
- Filters – Default / Recommended / Optional
- Download Options – PDF, Excel, Word
- Sharing, Subscribing, Emailing

Matt M - Saved Report - Report-01

More actions ▼

Save as ▼

Email

Download ▼

Done

ENERGYCAP

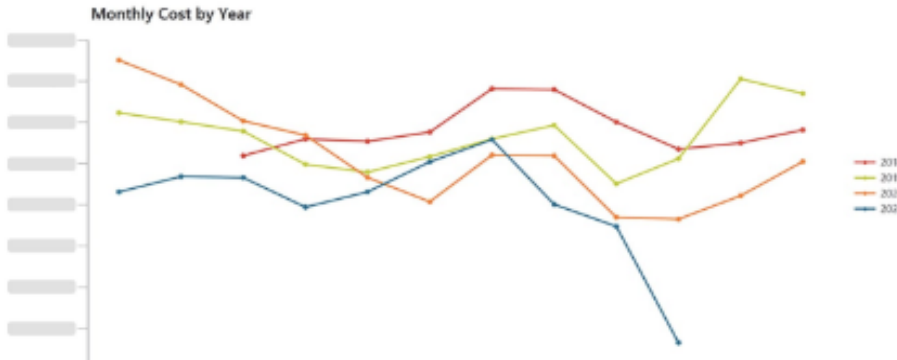
Happy Valley

Report-01 - Monthly Trends - Comparing Year-to-Year

Monthly Cost by Year

Executive Summary (\$)

Monthly Cost by Year



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2018													
2019													
2020													
2021													

A line chart and data table that show monthly values over multiple years. Use it to spot trends, patterns, and changes in use, cost, or other key metrics. Apply variance filters to automatically highlight exceptions or unusual changes. The data table below the chart lists the detailed monthly values that support the visual data. For example: "Compare the electric cost or use, by month, for each site for the last five years." or "Compare the total cost or use of all commodities for each site for the last five years."

Quick start instructions with popular filter settings: Set D...

Show instructions

Report-08 compares multiple objects for one year (Multi...

RELATED REPORTS

Report-08

Updated: 11/10/2025, Version 25

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Seven of The Most Popular EnergyCAP Reports

Report 01 – Monthly Trends – Year to Year

- Spot trends, patterns, and changes in use, cost, or other key metrics. Apply variance filters to automatically highlight exceptions or unusual changes.

Report 02 – Ranking Report

- Data table that ranks objects, such as sites or meters, based on key metrics like use, cost, or unit cost.

Report 06 – Year Over Year Comparison

- Data table that compares key metrics, such as use and cost, across meters, sites, and other objects for two to five consecutive time periods.

Report 10 – Two-Year Comparison

- Data table and bar chart that ranks objects & compares two years of data.

Report 17 – Missing Bill / Gaps

- Identifies three different problems: months with no bills, gaps in bills, and overlapping bills.

Report 21 – Monthly Comparison

- Triple line chart with data tables that lets you compare the use, cost, demand, and Average Unit Cost of two different years.

Report 42 – Sustainability Manager Report

- Pie charts and a data table that breaks out commodity use. Trend charts plot energy and water use

Watts Chat

Not sure where to begin? Watts Chat + Suggested Prompts can spur idea



Welcome to Watts AI

Ask me anything about your energy usage, costs, or performance.

PROMPT SUGGESTIONS [Shuffle](#)

Energy Management Finance & Accounting Sustainability

Bill Processing Data Integrity Business Management

Which buildings had the largest increase in electricity usage compared with the same month last year?

Show me interval meters that are offline, delayed, or missing data this week.

Which buildings have the highest energy use intensity, and how do they

Flag meters or buildings with unusual demand spikes or sudden

When you need specific details, Watts Chat can return results in seconds

What was the highest electric use month for the Division 4 - Operations site in the last 3 years?

Highest electric use month

For **Division 4 - Operations** ([@ site link](#)), the highest electric use in the last 3 years was:

- **October 2023**
- **282,386 kWh**

Closest runners-up

Month	Electric Use
January 2025	269,315 kWh
December 2025	222,577 kWh
November 2025	207,435 kWh

Takeaway

October 2023 was the peak electric use month, and it was materially above the later months in the period. If you want, I can also break this down into **cost, demand, and year-over-year comparison** for that site.

Be specific: Include the site, meter, account, period, commodity, or other details that matter to your request

Ask better questions: The more context you give Watts, the better the result.

Start with the outcome: Tell Watts what you're trying to understand, compare, or build

Refine as you go: Adjust your question, filters, fields, or output until you get exactly what you need

How to Build & Share Dashboards

Get started with the Create button!

The only requirement to begin your new dashboard is the name, which you can change later.

Welcome to your new dashboard!

Start by adding new widgets and then move and resize them as needed.

Easily filter your dashboard by organization, building, or building group using filters at the top of the dashboard.

If you have permissions, **decide how you want to share** your dashboard and **who can view it**.

Add Widget
[Learn more about dashboards](#)

Add Widgets!

Widgets work just like the reports so you can easily apply knowledge from one area to another.



Monthly Cost Trends
Compare monthly calendarized costs year-over-year.

Recommended

- ☐ Site group
- ☐ Topmost place code
- ☐ Topmost place name

Optional

- ☐ Commodity
- ☐ Commodity category
- ☐ End period

Share your Dashboard!

A “User Group” is needed to share your dashboard. These groups can contain one or more people.

With the right permissions and business case, your dashboard can also be shared and accessed using a URL.

More Actions ▾

Share ▲

Add Widget

Share with User Groups...
Public Access Settings and Links

Live Looks