Dashboards and Maps

ENERGYCAP. UtilityManagement™
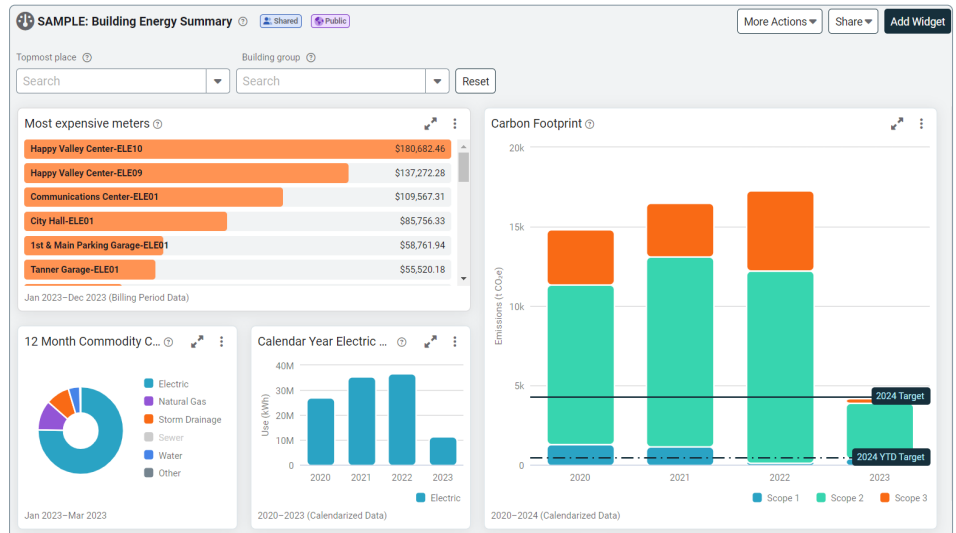
Create and customize dashboards and maps for your organization or the public.

Dashboard Benefits

- Monitor KPIs in real-time.
- Identify areas of improvement.
- Track progress towards goals.
- Spot early warning signs of issues.

You can quickly build a new dashboard by duplicating a favorite dashboard and updating the widget filters.

Find the Right Content

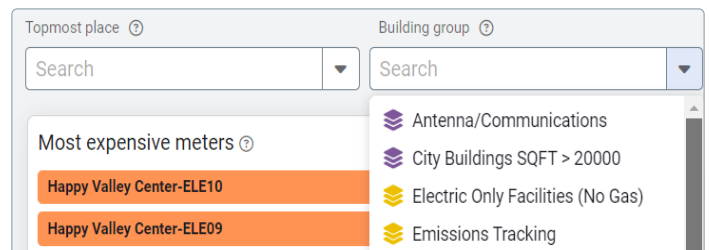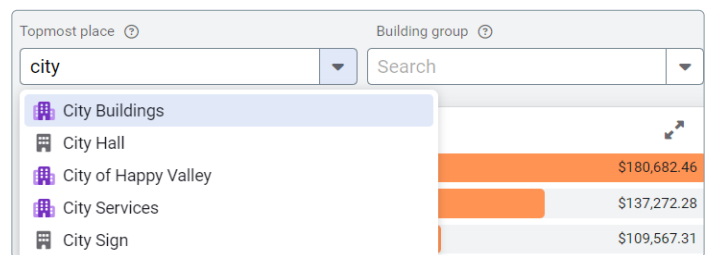Search by name or keyword and use the drop-down menus.

Global Dashboard Filter

Use the global dashboard filter to see a subset of your data.

While viewing a dashboard you can filter the data to a specific building or building group.

This filter overrides any specific topmost place or building group you set for a widget.

After you remove the global filter, the widget has the filters you originally configured.
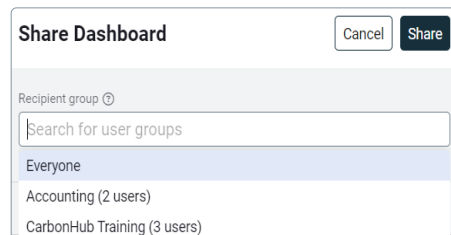
Dashboards and Maps

Share a Dashboard

You can share a dashboard with one or more user groups.

The person viewing a shared dashboard may not have the same topmost permissions and may not see the same information as the creator.
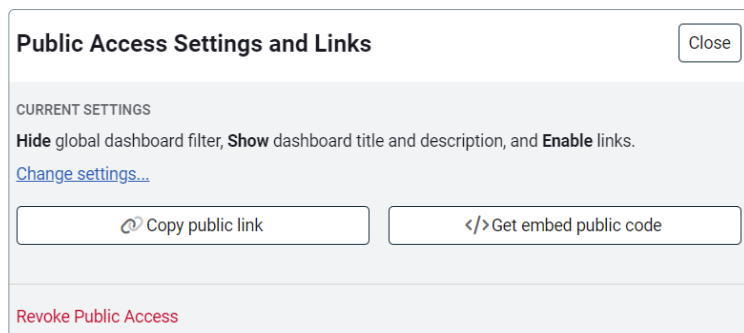
Share Dashboard		Cancel	Share

Recipient group ⓘ

Search for user groups

Everyone

Accounting (2 users)

CarbonHub Training (3 users)

Public Dashboards

In addition to sharing dashboards with user groups you can also share the dashboard with people who don't have a login to EnergyCAP.

You have two options when sharing a public dashboard, you can share a public link or use the embed code in a web page.
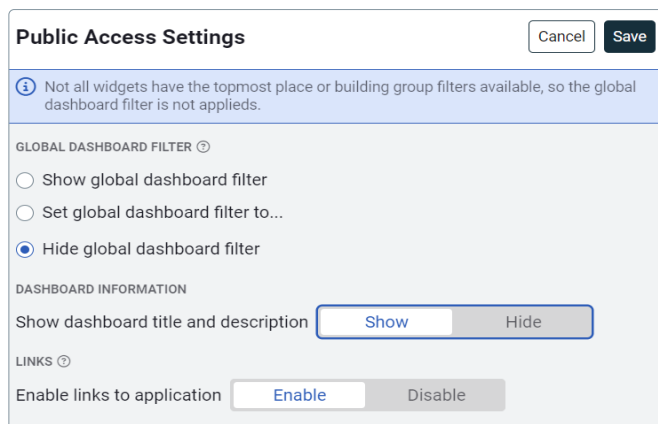
Public Access Settings and Links   Close

CURRENT SETTINGS

Hide global dashboard filter, **Show** dashboard title and description, and **Enable** links.

Change settings...

🔗 Copy public link   </> Get embed public code

Revoke Public Access

Public Access Settings

You have control over how to share the dashboard.

1. Decide if you want to show, set, or hide the global filter.
2. Show or hide the dashboard title and description.
3. Enable or disable dashboard links back to the appliction. It's helpful to disable the links because public viewers won't have login credentials.

Public Access Settings   Cancel   Save

ⓘ Not all widgets have the topmost place or building group filters available, so the global dashboard filter is not appliesd.

GLOBAL DASHBOARD FILTER ⓘ

○ Show global dashboard filter
○ Set global dashboard filter to...
◉ Hide global dashboard filter

DASHBOARD INFORMATION

Show dashboard title and description | Show | Hide |

LINKS ⓘ

Enable links to application | Enable | Disable |

Public Dashboards Manager

Sharing a dashboard with the public is a separate permission.

A user with the manage permission on Public Dashboards/Maps can share publicly with a public link or as an iframe embedded on a web page.

Dashboards	B Basic User	S Standard User	E Experienced User	X Expert User	A Administrator	P Public Manager
View shared dashboards		X	X	X	X	
Edit filters and settings			X	X	X	
Create shared dashboards				X	X	
Manage all shared dashboards					X	
Manage public dashboards						X