

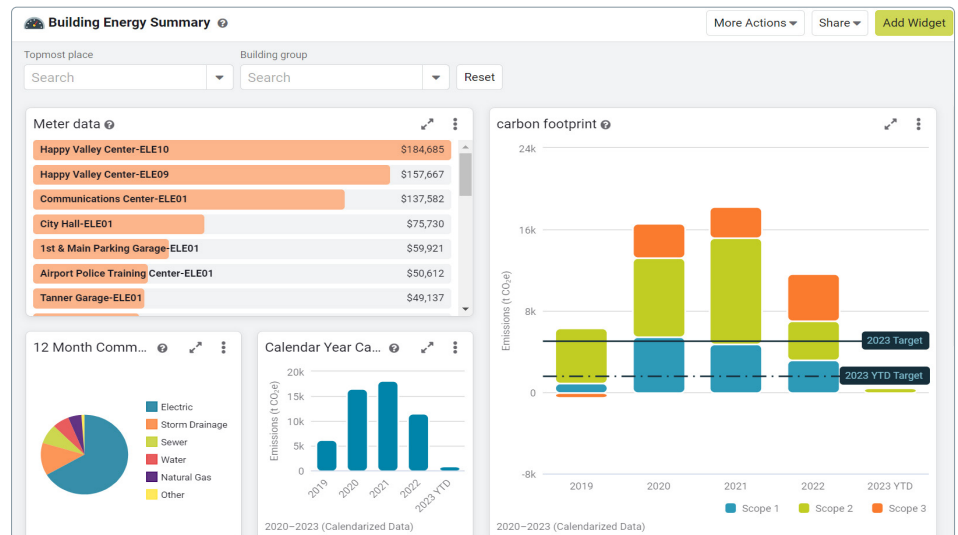
Dashboards and Maps

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.

Search by name or keyword: Object: All Objects Display type: All Display Types Data Type: All Data Types

- Bar Rank**: Rank buildings, meters, or accounts based on common use or cost metrics over a period of time.
- Bill Flags**: Flagged bills by meter, building, or account.
- Commodity Cost**: Commodity cost charts actual data for the most recent 12 months.
- GHG Rankings by Building**: Rank buildings or building groups based on carbon emissions.

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.

Topmost place: Building group: Search

- City Buildings
- City Hall
- City of Happy Valley
- City Sign

Topmost place: Search Building group: Search

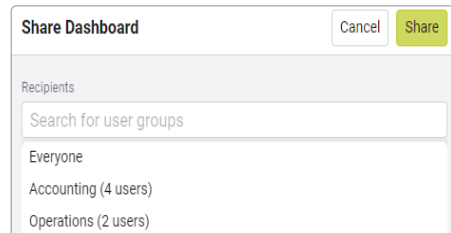
- General Office
- Mixed Use Property
- Older than 30 years
- Other

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.

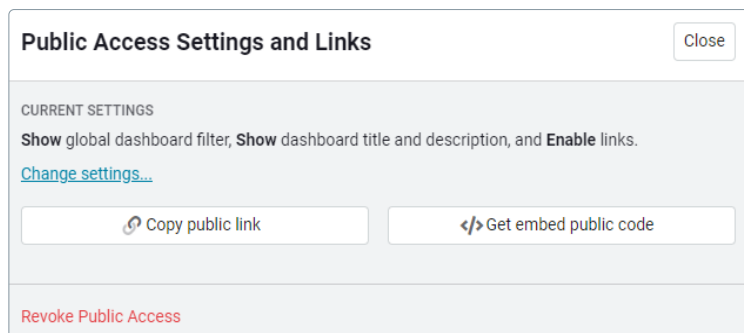


The 'Share Dashboard' dialog box includes a 'Cancel' button and a green 'Share' button. Under the 'Recipients' section, there is a search input field labeled 'Search for user groups'. Below the search field, a list of recipients is shown: 'Everyone', 'Accounting (4 users)', and 'Operations (2 users)'.

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.

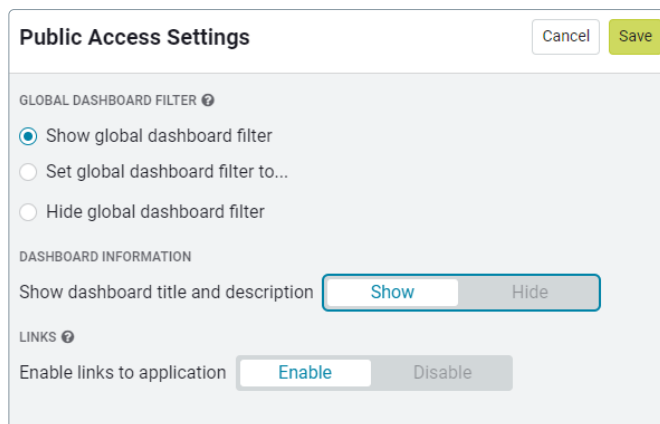


The 'Public Access Settings and Links' dialog box has a 'Close' button. Under 'CURRENT SETTINGS', it states: 'Show global dashboard filter, Show dashboard title and description, and Enable links.' There is a link for 'Change settings...'. Below are two buttons: 'Copy public link' and 'Get embed public code'. At the bottom, there is a red link for '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 dashboards links back to the application. It's helpful to disable the links because public viewers won't have login credentials to EnergyCAP.



The 'Public Access Settings' dialog box has 'Cancel' and 'Save' buttons. It features three sections: 'GLOBAL DASHBOARD FILTER' with radio buttons for 'Show global dashboard filter' (selected), 'Set global dashboard filter to...', and 'Hide global dashboard filter'; 'DASHBOARD INFORMATION' with a 'Show dashboard title and description' section containing 'Show' and 'Hide' buttons; and 'LINKS' with an 'Enable links to application' section containing 'Enable' and 'Disable' buttons.

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.

	B	S	E	X	A	P
	Basic User	Standard User	Experienced User	Expert User	Administrator	Public Manager
Dashboards						
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