Utility Management Program User Guide

Housing Services Corporation

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HSC

Overview

What is energy monitoring?

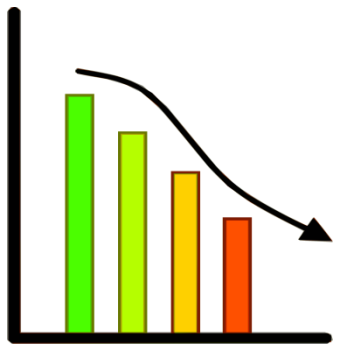
- A process to measure and evaluate your building's energy and water performance
- Uses software to:
  - Track and analyze your building's utility data and overall energy and water performance
  - Help you visualize your consumption patterns
  - Help you identify and prioritize savings opportunities
- A starting point for controlling your consumption

Why monitor your energy and water use?

- Measure progress
- Identify problems and opportunities
- Prioritize decisions and make a case for change
- Educate members and staff
- Crucial part of an Energy Audit

HSC's Utility Management Program

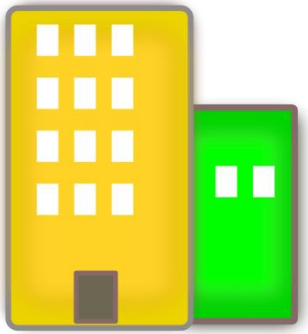
- Our online UMP system gives you:
  - **Quick snapshots** of your performance
  - **Easy navigation** and custom dashboards
  - **Benchmark** your portfolio
  - **Variety of reports** you can run, plus quarterly emails
  - **Project tracking** capability
  - **Expert analysis & support**



What Will You See in UMP

UMP online:

- Utility performance data for your enrolled buildings, typically:
  - Townhouse complex
  - Low-rise
  - High-rise



Quarterly Reports:

- Monthly and year-over-year consumption trends
- Summaries by utility

Roles

HSC:

- Manage and enter data
- Email quarterly reports to users
- Analyze data
- Support users

Users:

- Login and review data on ongoing basis
- Provide data to HSC as needed
- Communicate to decision-makers
- Use UMP to inform decisions

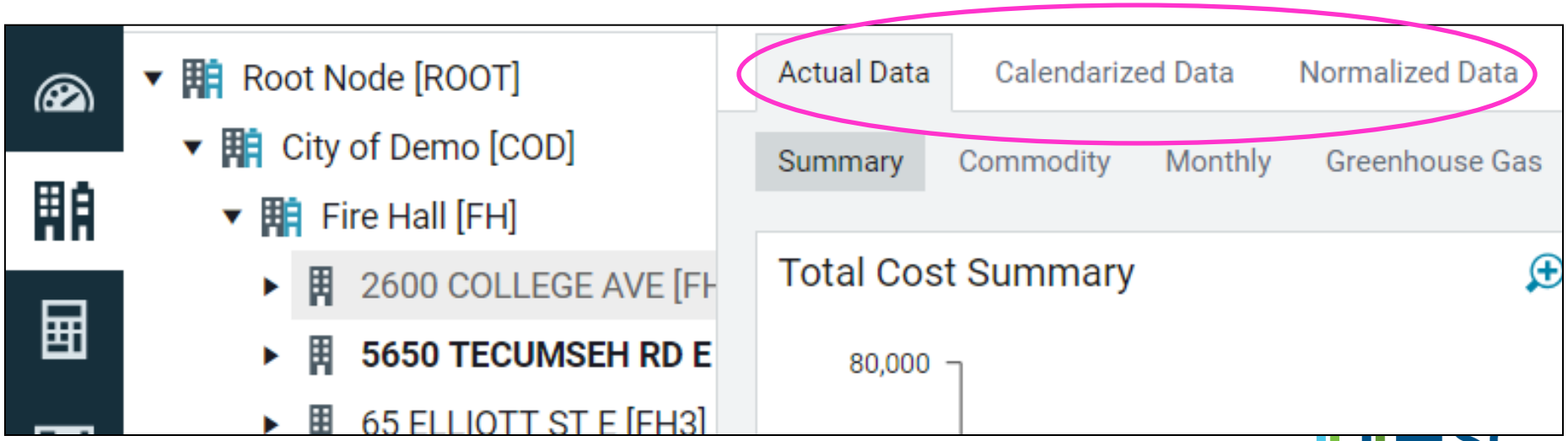
Understanding Data Types: Actual, Calendarized, & Normalized Data

Understanding Data Types

In the UMP system, you can view data in different ways:

- **Actual Data:** shows the usage and reading dates from your utility bills
- **Calendarized Data:** shows your bill data prorated to each calendar month
- **Normalized Data:** factors out weather to provide an apples-to-apples comparison of your calendarized consumption from year to year.

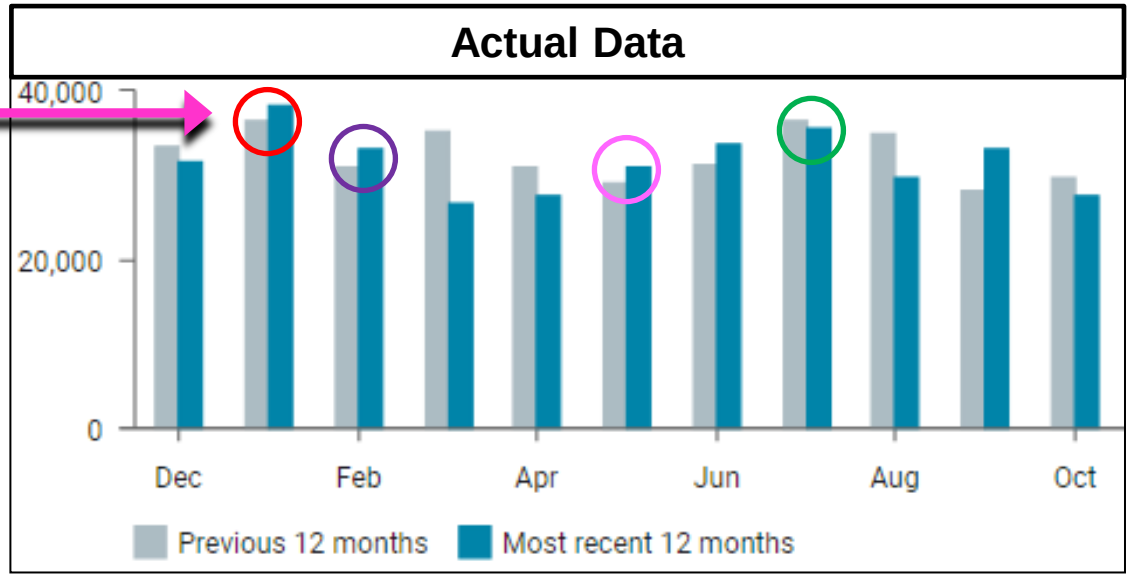
ALWAYS CHOOSE NORMALIZED DATA WHEN GIVEN OPTION

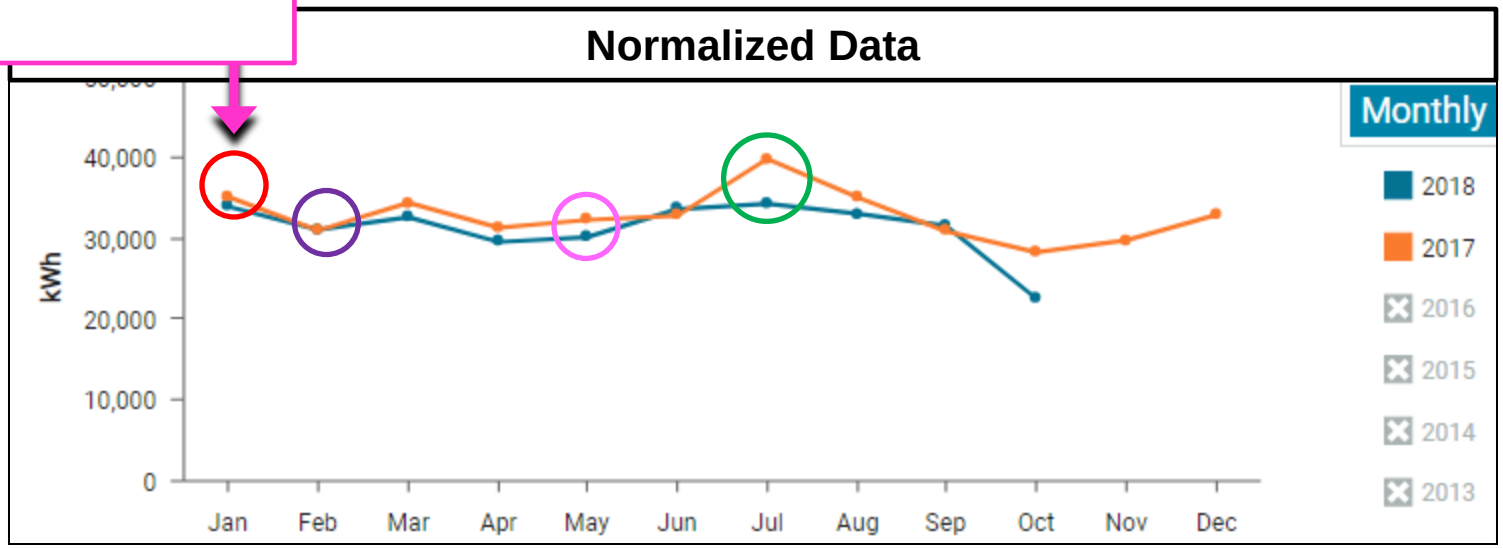


Example of Actual versus Normalized Data

In this example, the **Actual Data** shows an increase in January, February, and May usage and a small decrease in July of the current year compared to last year.

However, the **Normalized Data**, where weather is addressed, shows there is really a decrease in January, February, and May usage and a significant decrease in July of this year versus the previous year.





Normalized Data = Apples-to-Apples comparison

Getting Started:
Logging In

Choosing an Internet Browser

The UMP system can be used on:

Chrome (57+)

Firefox (53+)

Edge (41+)

Safari (latest version for Mac)

UMP is not compatible with:

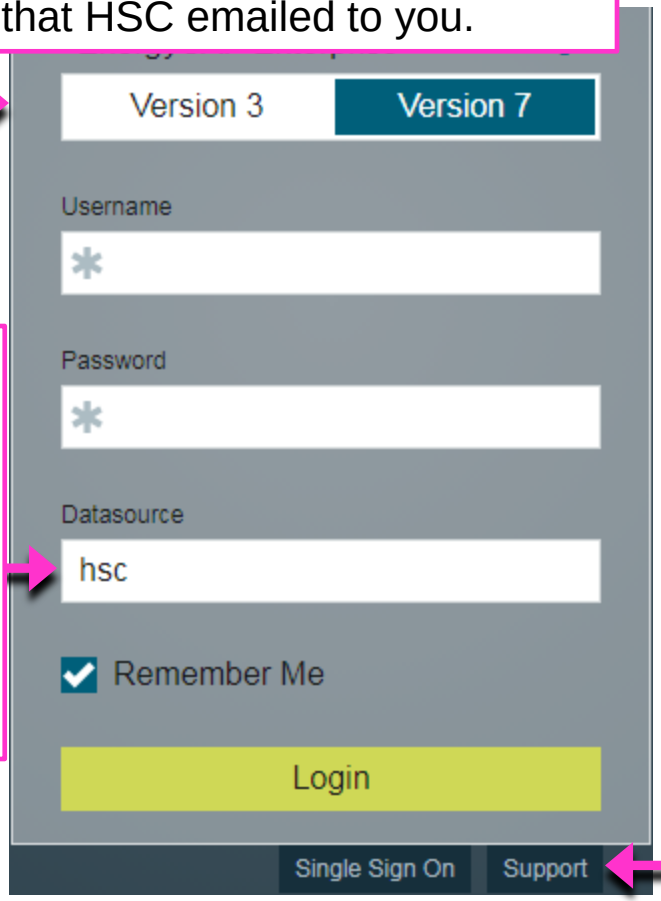
Internet Explorer

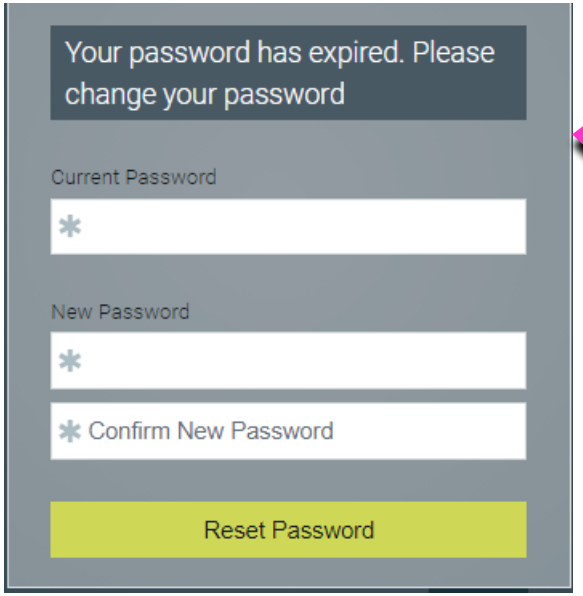
Logging In to UMP

Website: https://my.energycap.com/app/login

Click **Version 7**. Then, enter the username and password that HSC emailed to you.

When you log-in the first time, you may be asked to **change your password** for your account.





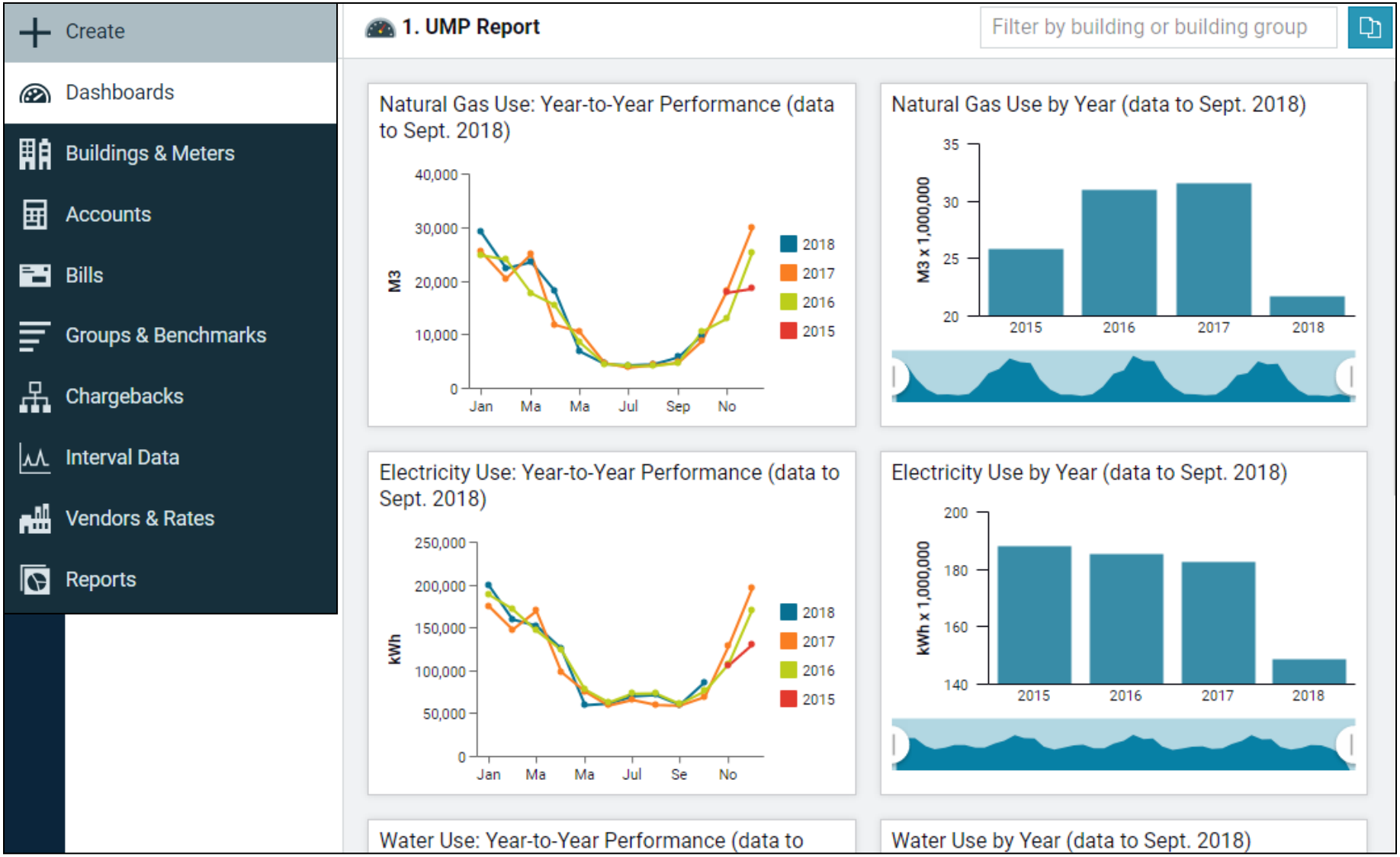
Remember to type "**hsc**" in Datasource. Check **Remember Me** to save your login. Then click **Login**.

If you lose your password, click **Support**. From the Support webpage., click **Lost Password** on the left and enter your email to receive a reset link.

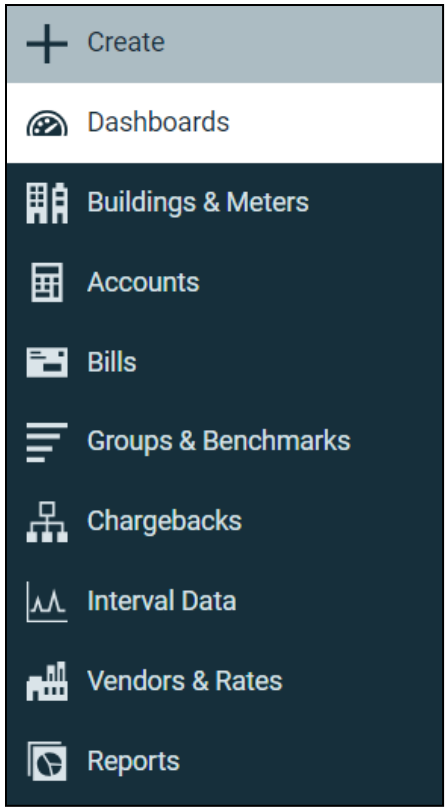
Navigating:
Menus

The Menu

There is a menu of icons on the left side. Each menu section or “module” allows you to see and use your data differently. Hover your mouse over the menu icons of the left side to see the full menu list.



Menu Sections



- Create: quick button to set up a new dashboard
- **Dashboards:** snapshot summaries of your data
- **Buildings & Meters:** facility and meter view of your data
- Accounts: financial view of your data, including bills
  - ***NOTE: utility costs and rates are estimated in UMP***
- Bills: shows all bills for a meter; can export bill data here
- Groups & Benchmarking: compares multiple like buildings' performance. Helps to identify problems & outliers
- **Reports:** a hub to choose and run reports. HSC's quarterly reports are under "Reports Shared with Me"

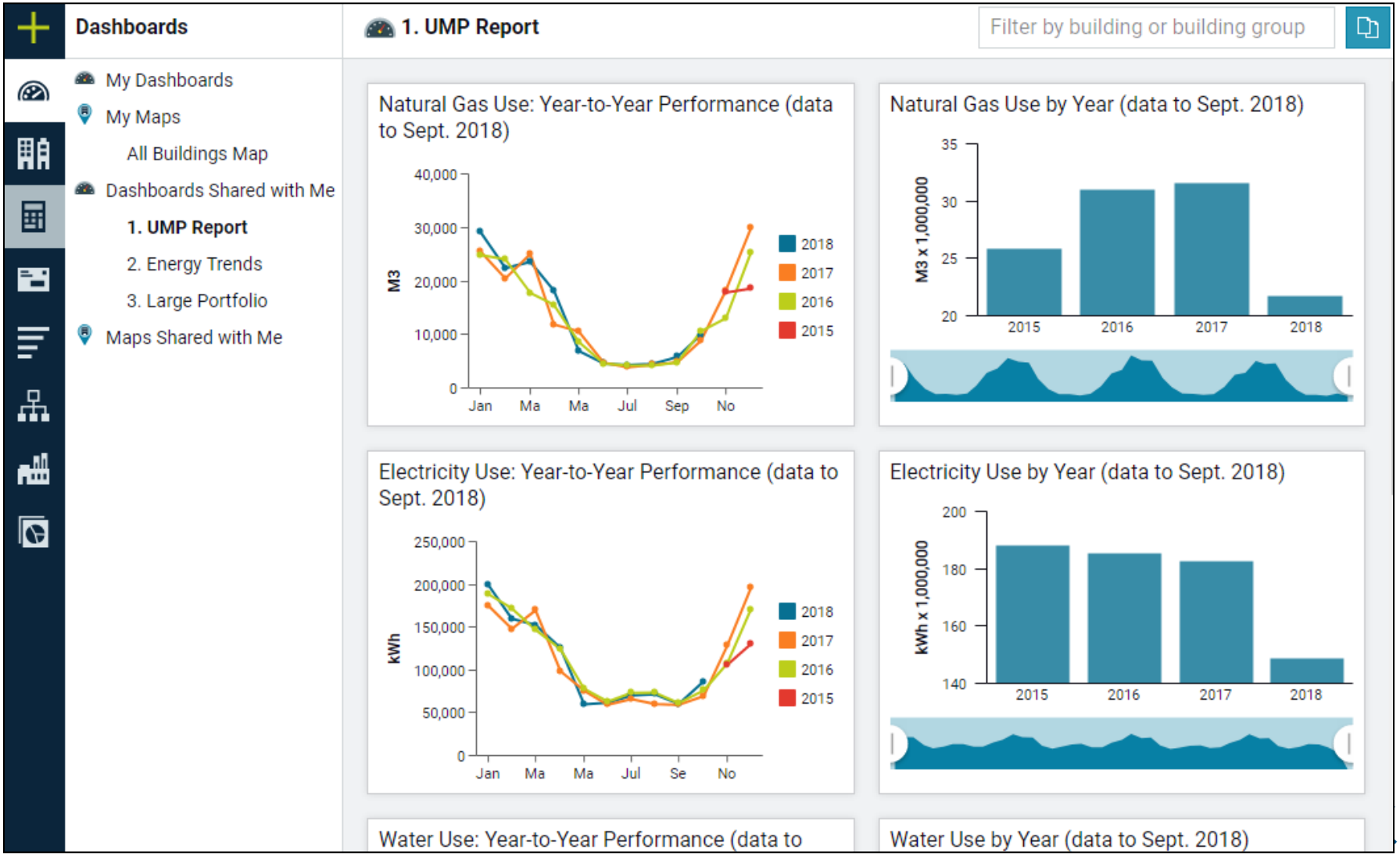
- Chargebacks
- Interval Data
- Vendors & Rates

Not applicable / Used for HSC data management

Viewing Your Data: Summary Dashboards

Dashboard Overviews

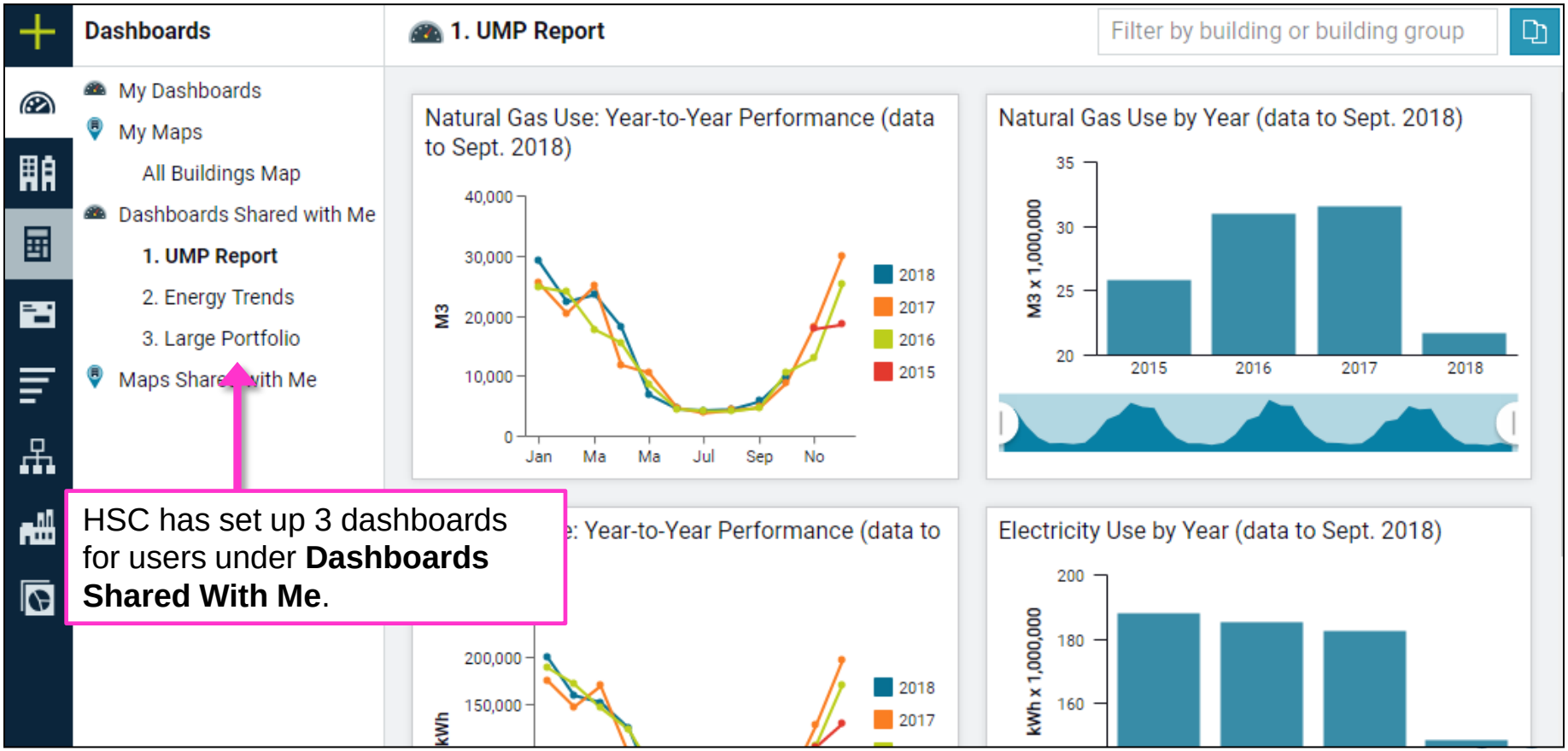
When you log-in to UMP, you will see your “dashboard” summary page that provides a high-level overview of your buildings.



Viewing a Dashboards

HSC has set up 3 dashboards for users under **Dashboards Shared with Me**:

1. **UMP Report:** similar to the old Excel-based UMP report, this dashboard shows a high-level comparison of your utility use by month and by year.
2. **Energy Trends:** this dashboard provides a “deeper dive” view of your building’s performance using usage and cost trend graphs.
3. **Large Portfolio:** this dashboard is for users with more than one building in UMP. It ranks a user’s buildings by highest use and least efficient.



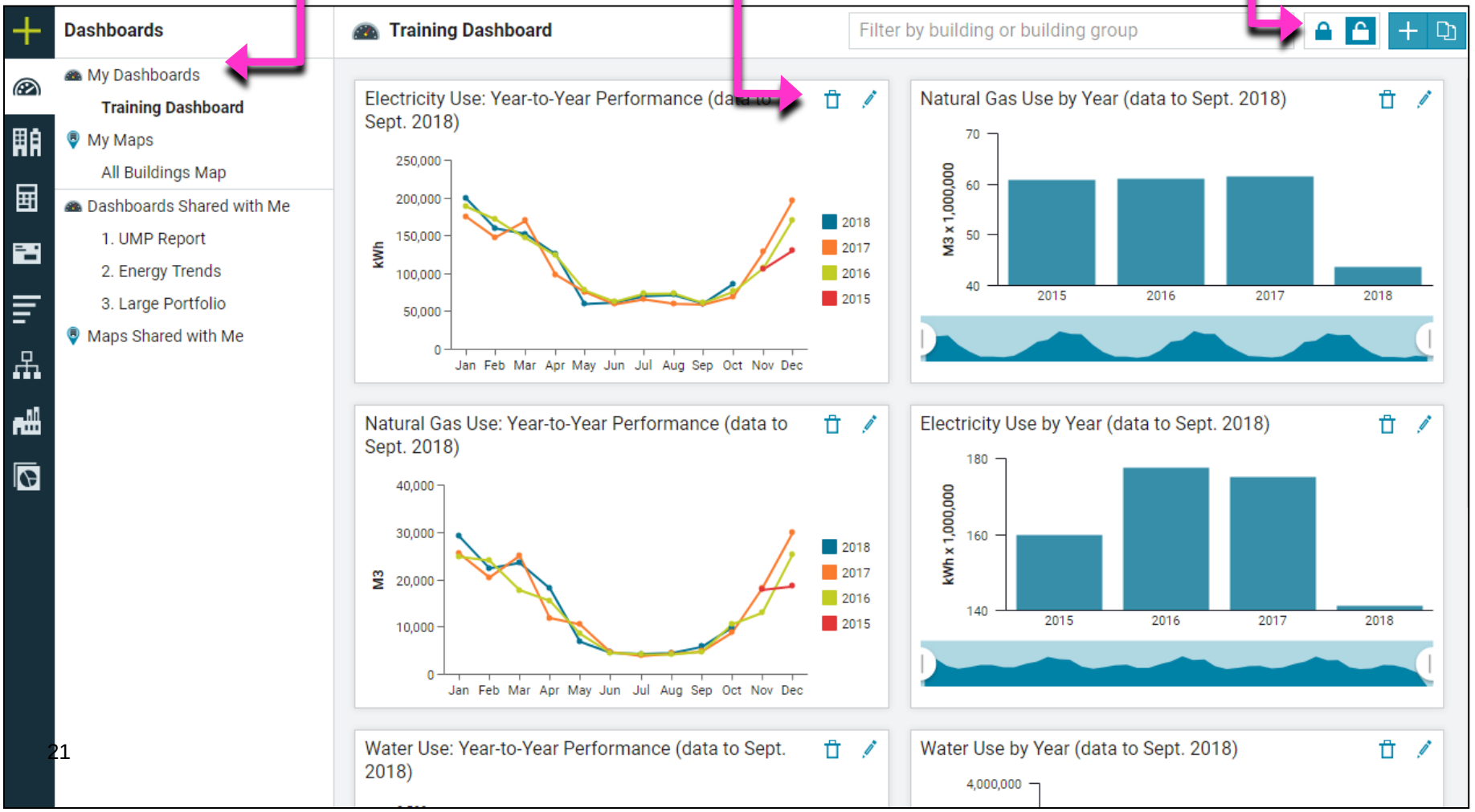
Changing your Dashboards

To create a new dashboard, first click **My Dashboards**. Then click the **Plus** icon on the My Dashboards webpage.

To modify an existing dashboard, first click the **Unlock** icon.

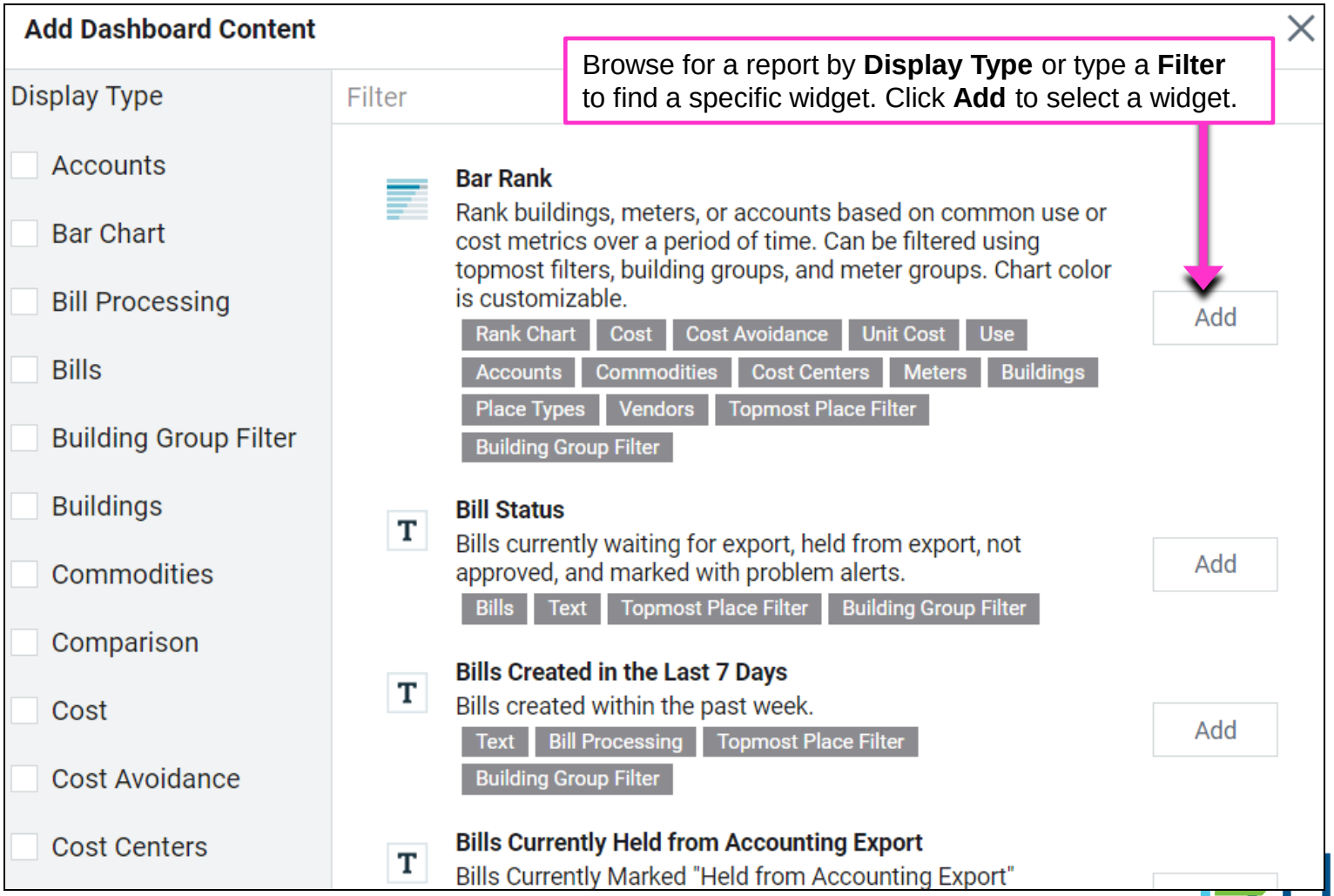
Delete a widget by clicking the **Trashcan**, or edit it by clicking the **Pencil**.

Click and **drag** a widget to move it around in the dashboard. Add a new widget by clicking the **Plus** icon.



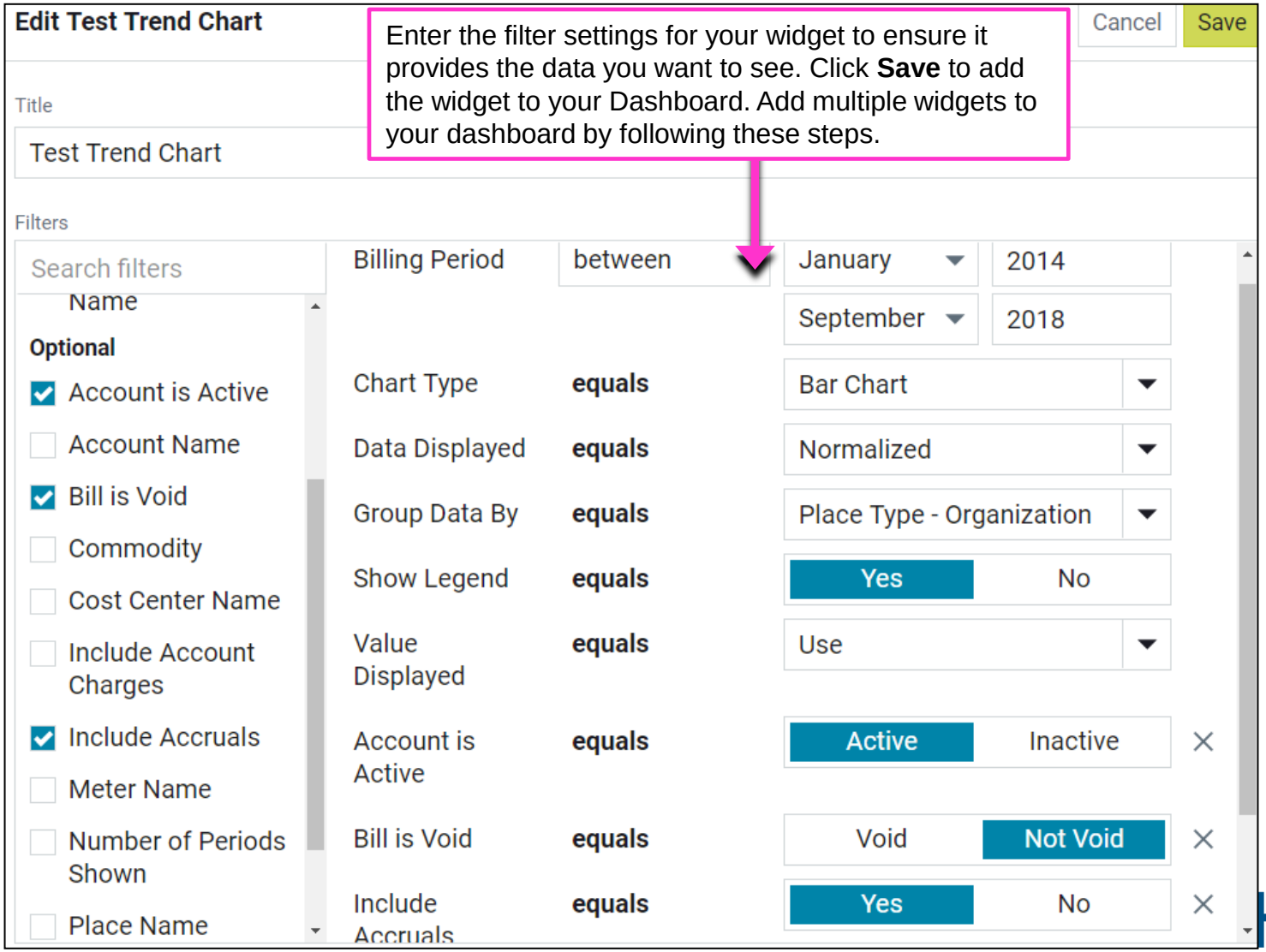
Activity: Adding or Editing Dashboard Widgets

After you click the **Plus** icon to add a widget (see previous slide), you will choose a widget from the popup **Add Dashboard Content** box.



Activity: Adding or Editing Dashboard Widgets

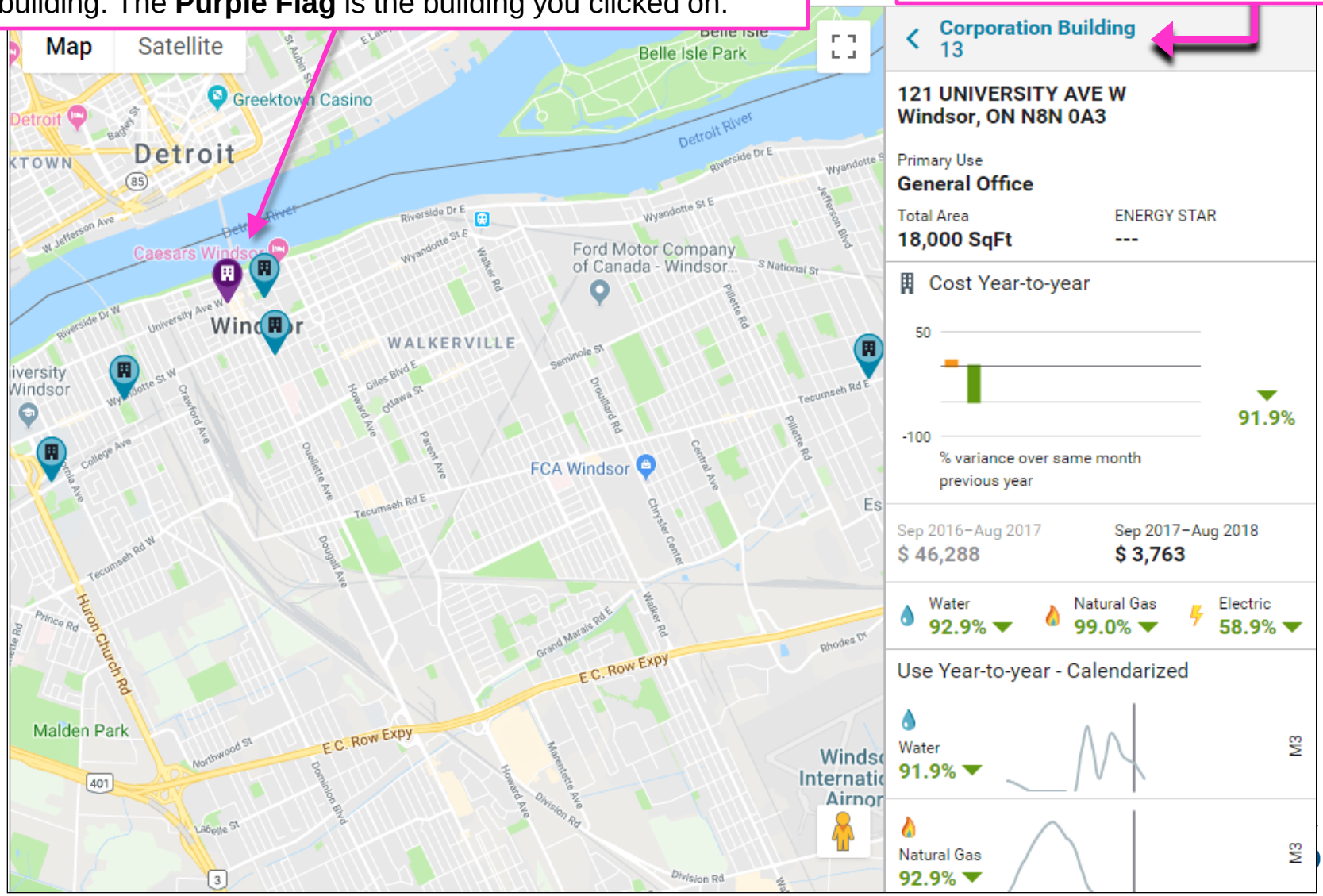
Once you select a widget to add or edit, you can modify it with filters to show data for specific billing periods, utility types, buildings, and more.



Viewing the Building Map Dashboard

The **Building Map Dashboard** lets you zoom in to individual locations. Click on a **Blue Flag** to see data for a specific building. The **Purple Flag** is the building you clicked on.

Click on the blue **Building Name** to view the properties for that building in more detail.



Viewing Your Data: Buildings & Meters

Finding Your Buildings and Meters

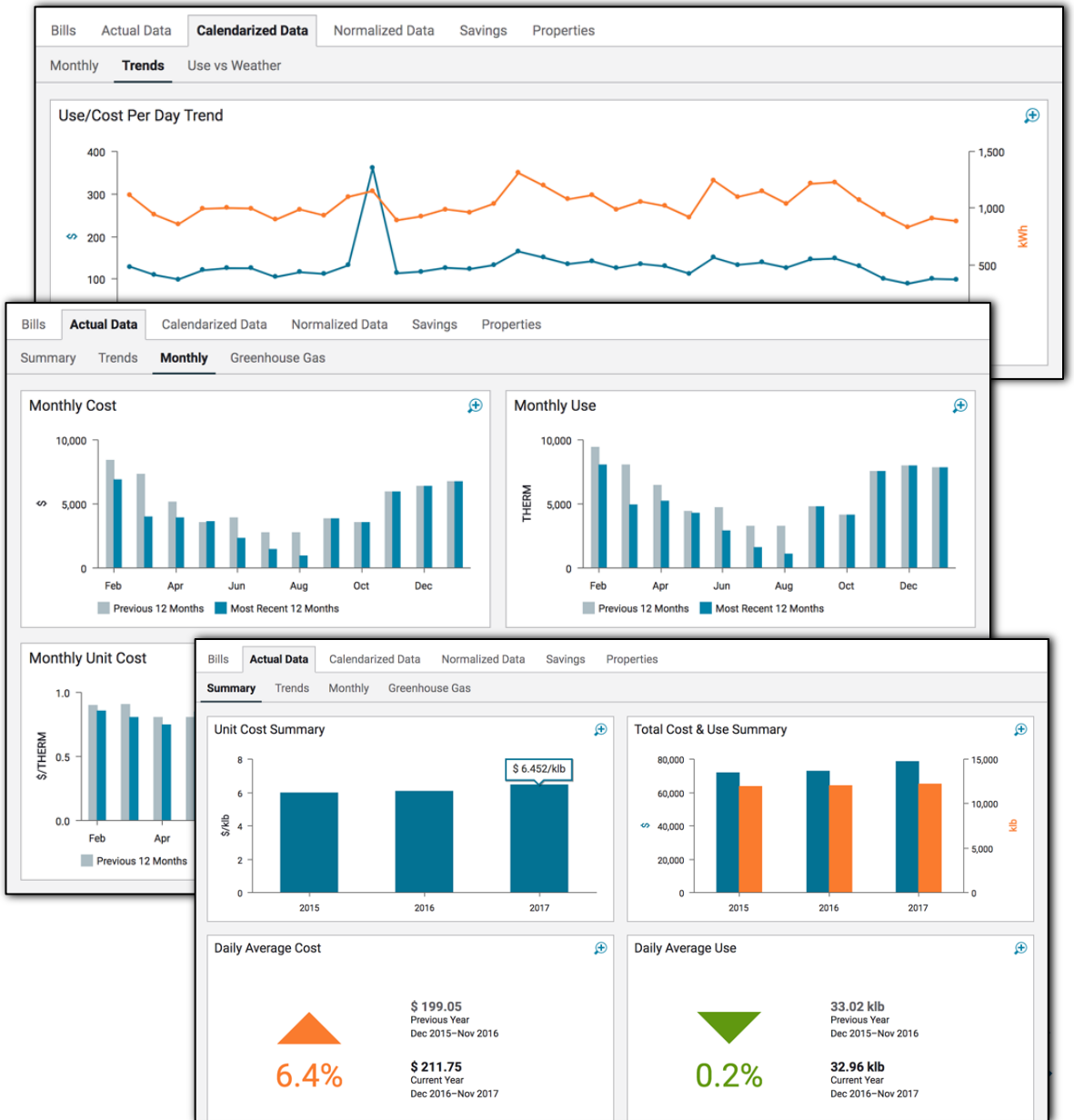
- Find an organization, building, or meter using the tree hierarchy on the right of modules menu

Tree Structure Levels:

- **Organization:** topmost “root” level of your portfolio
- **Building:** one building except in special cases
- **Meter:** where your building’s natural gas, electricity, and water consumption is tracked
  - Shared Meters:
    - A meter with a red arrow indicates it is shared with another building(s):
    - The consumption is split between the shared meters based on each building’s percentage of the total floor area or on a formal sharing agreement.

PowerViews

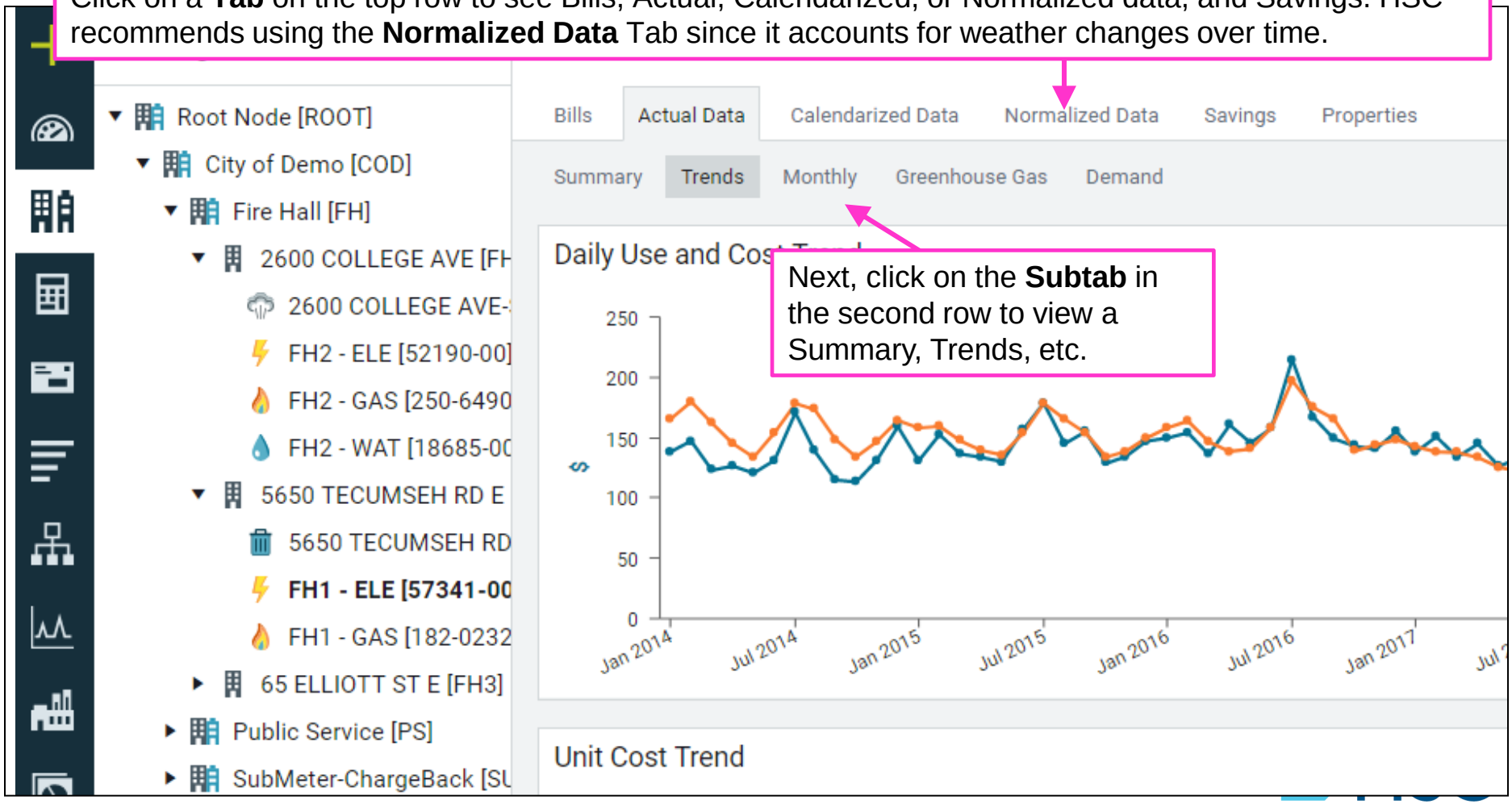
- Located throughout UMP
- Provide a snapshot of consumption for any meter, building, or an organization
- Help you spot trends over time or outliers in your data
- Main way to view your individual building and meter data



Looking at Different PowerViews

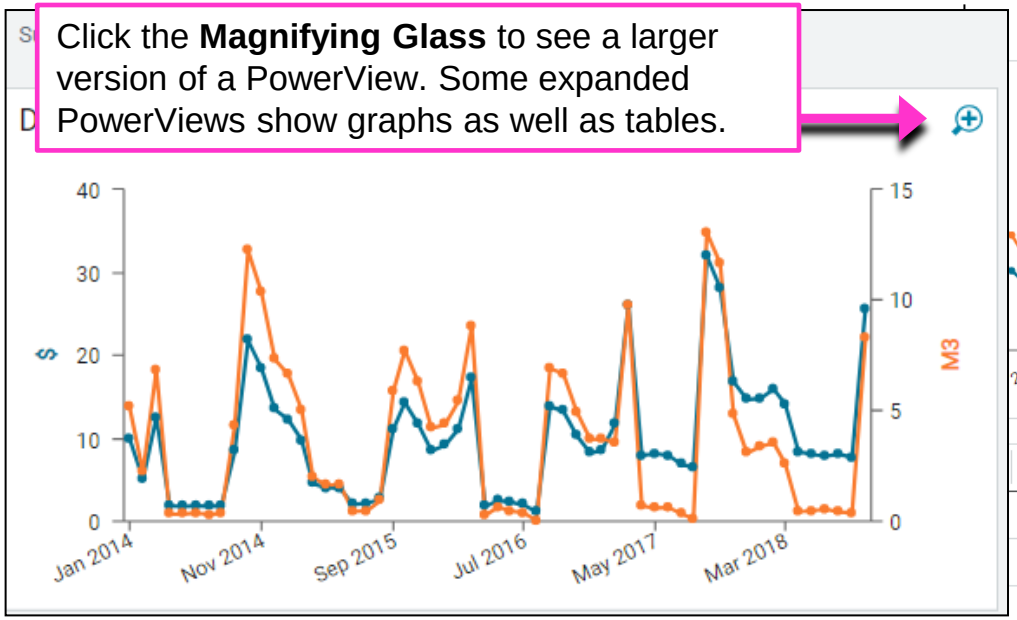
PowerViews have “tabs” with associated “subtabs” showing different views of your data.

Click a module from the **Menu**. Then, select an **Organization**, **Building**, or **Meter** from the TreeView. Click on a **Tab** on the top row to see Bills, Actual, Calendarized, or Normalized data, and Savings. HSC recommends using the **Normalized Data** Tab since it accounts for weather changes over time.

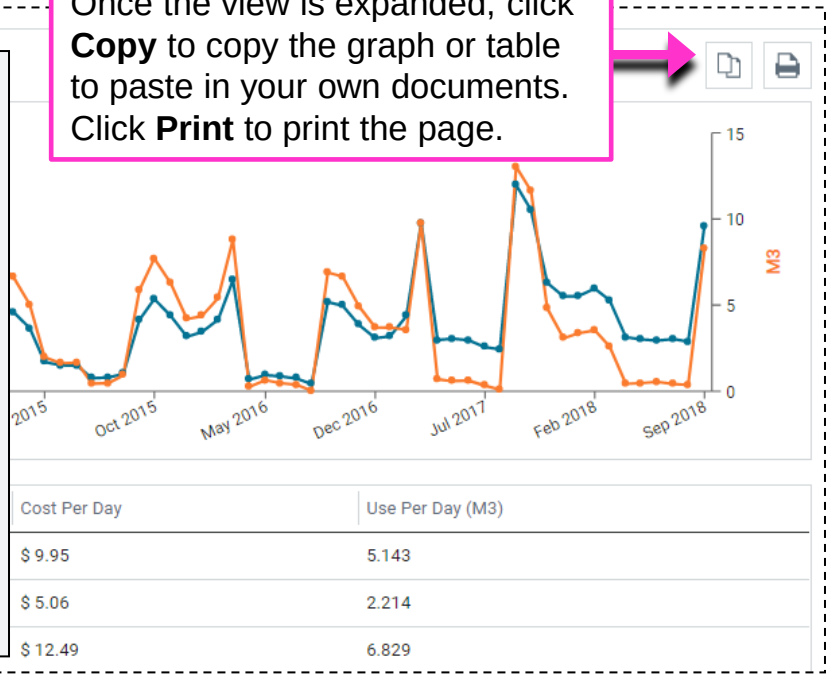


Zooming in a PowerView

Click the **Magnifying Glass** to see a larger version of a PowerView. Some expanded PowerViews show graphs as well as tables.

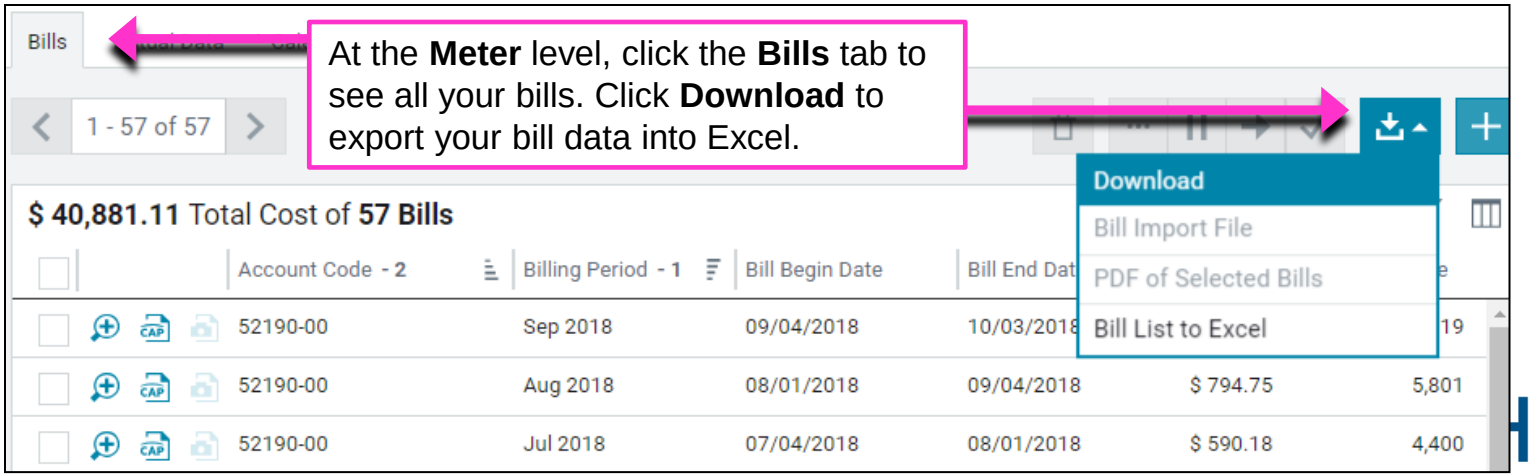


Once the view is expanded, click **Copy** to copy the graph or table to paste in your own documents. Click **Print** to print the page.



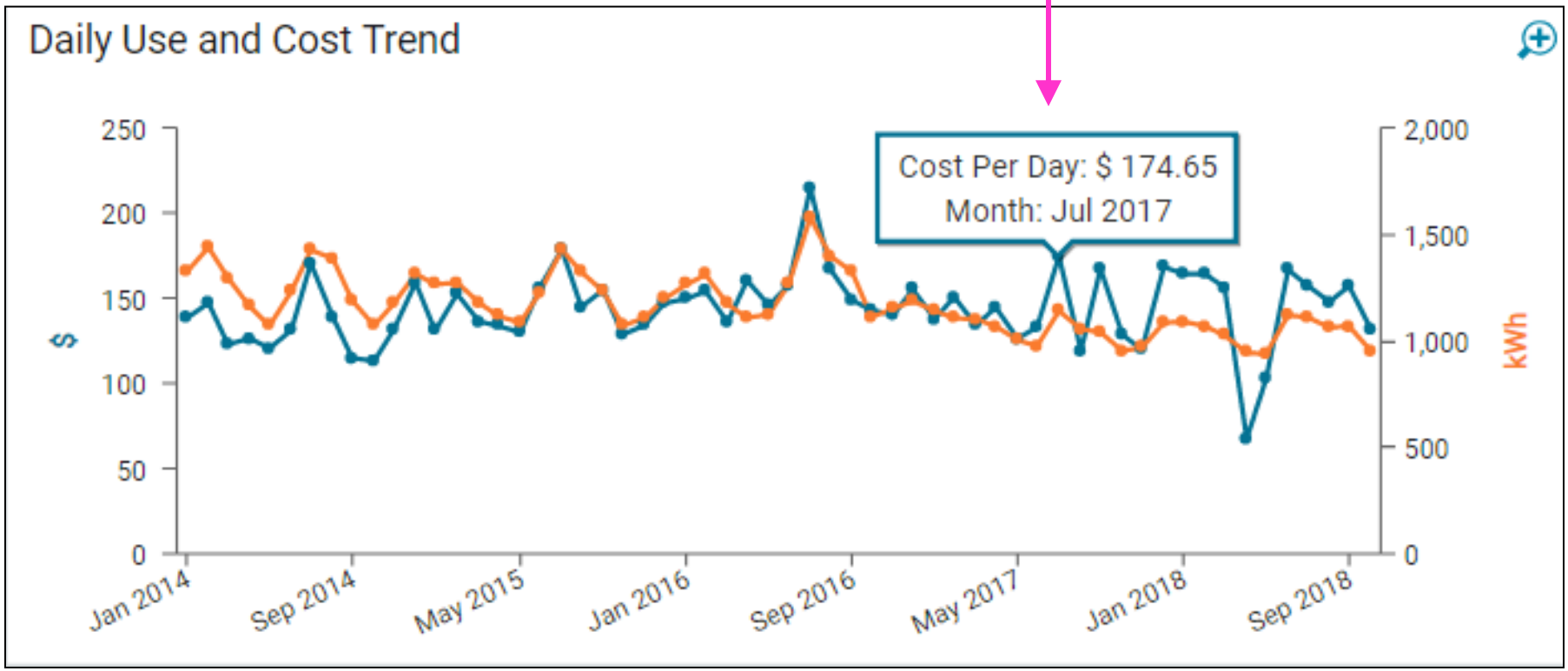
Cost Per Day	Use Per Day (M3)
$ 9.95	5.143
$ 5.06	2.214
$ 12.49	6.829

At the **Meter** level, click the **Bills** tab to see all your bills. Click **Download** to export your bill data into Excel.



Zooming in a PowerView

Tip: By hovering your mouse over a data point, you can view its specific information.



List of Building & Meter PowerView Tabs

- **Bills:** in the Meters level only and shows all bills entered for a given meter.
- **Actual Data:** shows the raw data from your utility bills as they were entered into UMP
  - ***NOTE: utility costs and rates are estimated in UMP***
  - **Greenhouse Gas:** view the emissions data related to the specific usage values from your bills
- **Calendarized Data:** shows your bill data prorated for each calendar month
  - **Use vs Weather:** at the Meter level only, indicates if a meter's usage increases or decreases in hot or cold weather
- **Normalized Data:** applies the weather patterns for a single "base year" to all your meters to provide an apples-to-apples comparison of your calendarized usage from year to year
  - **Monthly Normalized Data:** shows apples-to-apples comparison of usage data across years. Click the year label in the **Chart Options** box to add or remove specific years from the chart.
  - **Energy Trend (EUI):** at the building level only, shows how much energy per area your building is using (i.e. Energy Use Intensity). A useful indicator of your building's energy efficiency.
- **Savings:** also called Use or Cost Avoidance, shows the savings from your efficiency efforts
  - **Other Savings:** at Meter level only, shows
  - **Special Adjustments:** at Meter level only, shows additional adjustments made for cost avoidance calculations
- **Energy Projects:** at Buildings level, allows user to enter a project for tracking
- **Properties:** depending on the tree level, shows the details about an organization, a building (size, unit count, heating type, etc.), or a meter (utility company, account number, etc.)
- **Other Subtabs:** (at Building or Meter level or both)
  - **Summary:** shows an annual/long-term view of your usage and cost data
  - **Monthly:** shows rolling 24-month summary of usage and cost
  - **Trends:** at the Meter level, shows how your data has changed over time
  - **Commodity:** at Organization and Building levels, shows use data for a selected utility type
  - **Demand**: for electricity at Meters level, shows default values estimated by the software

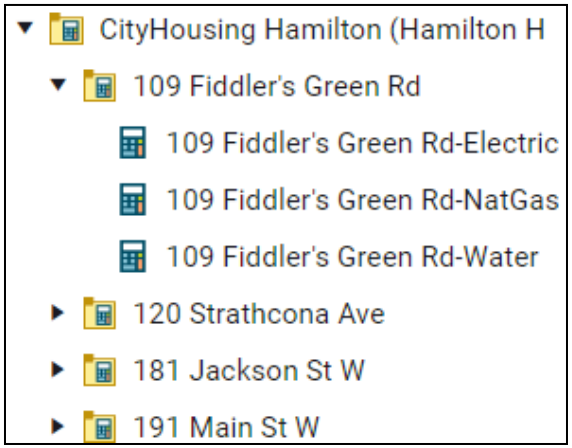
List of Accounts Screens & PowerViews

Every tab in the **Accounts** module shows **Actual Data**. The tabs include:

- **General:** the configured settings for a given item (meter, bill). Includes links to the item and a list of Quick Reports
- **Summary:** annual cost of the Account (all commodities combined)
- **Commodity:** yearly summary of total cost, total use, cost per unit for each commodity associated with the account or building. A single subtab is available per commodity
- **Monthly:** month-by-month summaries of cost, use, and cost per unit for each commodity represented by an account or building. Shows previous 24 months of data
- **Bills:** view the actual bills that have been entered for a given account

Remember: the costs and rates are estimated in UMP. The consumption data is from your utility bills.

TreeView for Accounts module:



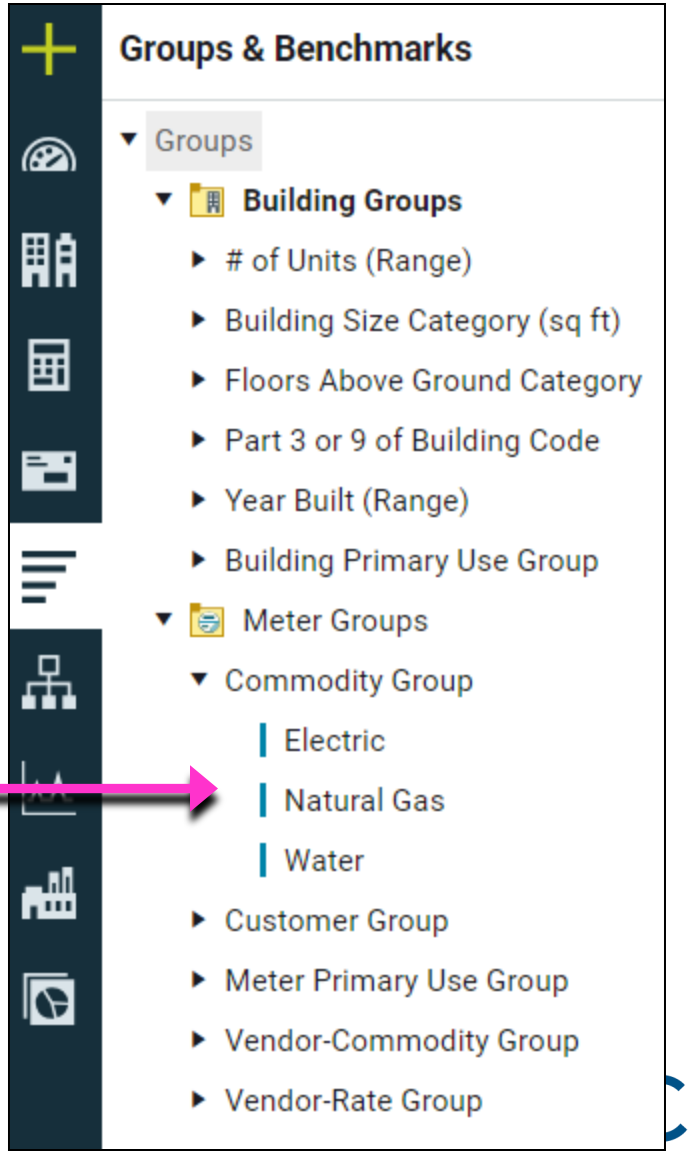
Comparing Buildings: Groups & Benchmarking

Groups & Benchmarks Module

- In the UMP software, you can compare the buildings within your portfolio to each other
- Comparison to buildings outside your portfolio is:
  - Currently available as a email benchmark report by request to HSC
  - Expected to be available in the online UMP software by the end of the year

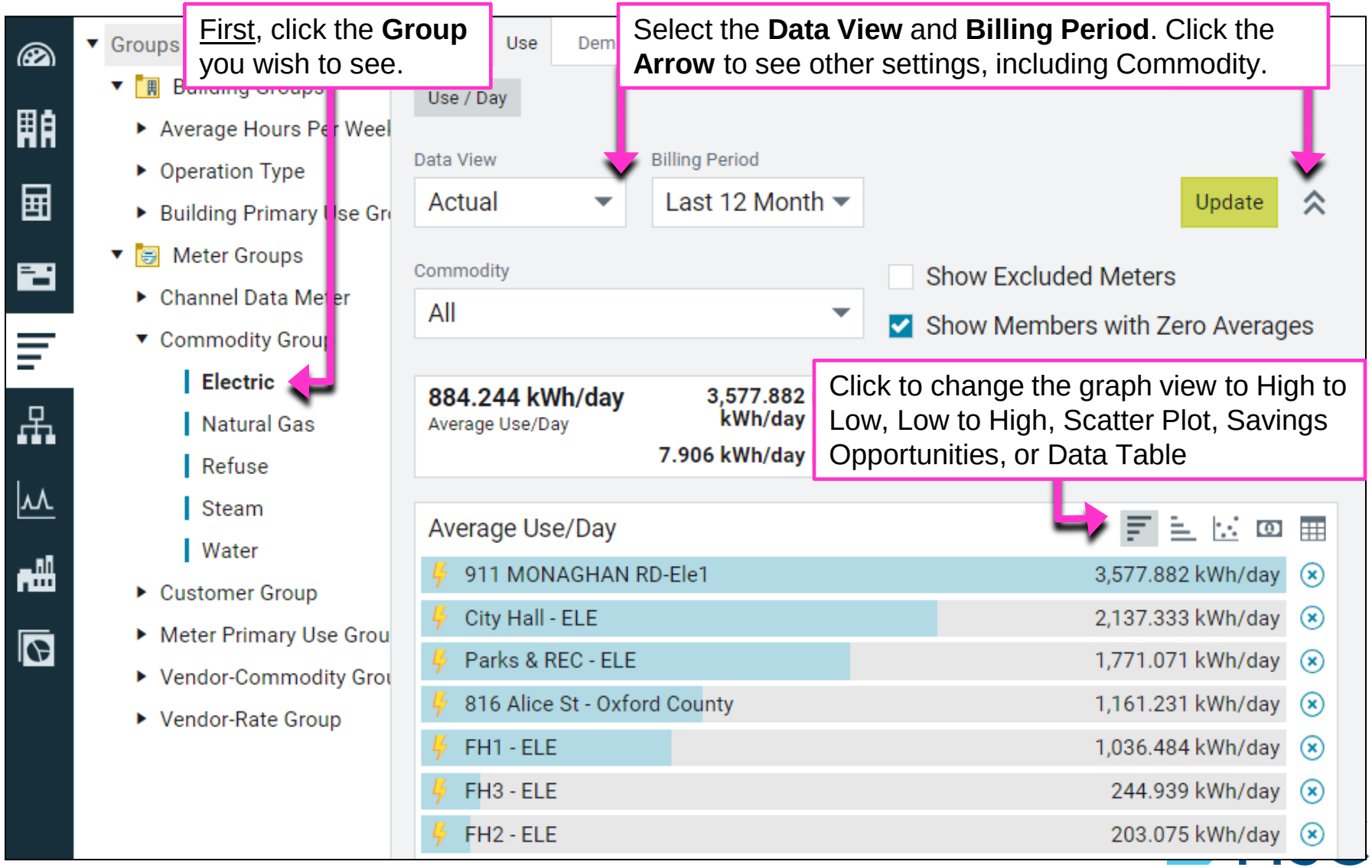
Groups & Benchmarks Module

- Compares multiple like buildings or meters within your portfolio
- Building Groups: compare by size, age, units, heating, year built.
- Meter Groups: Commodity Group is most useful



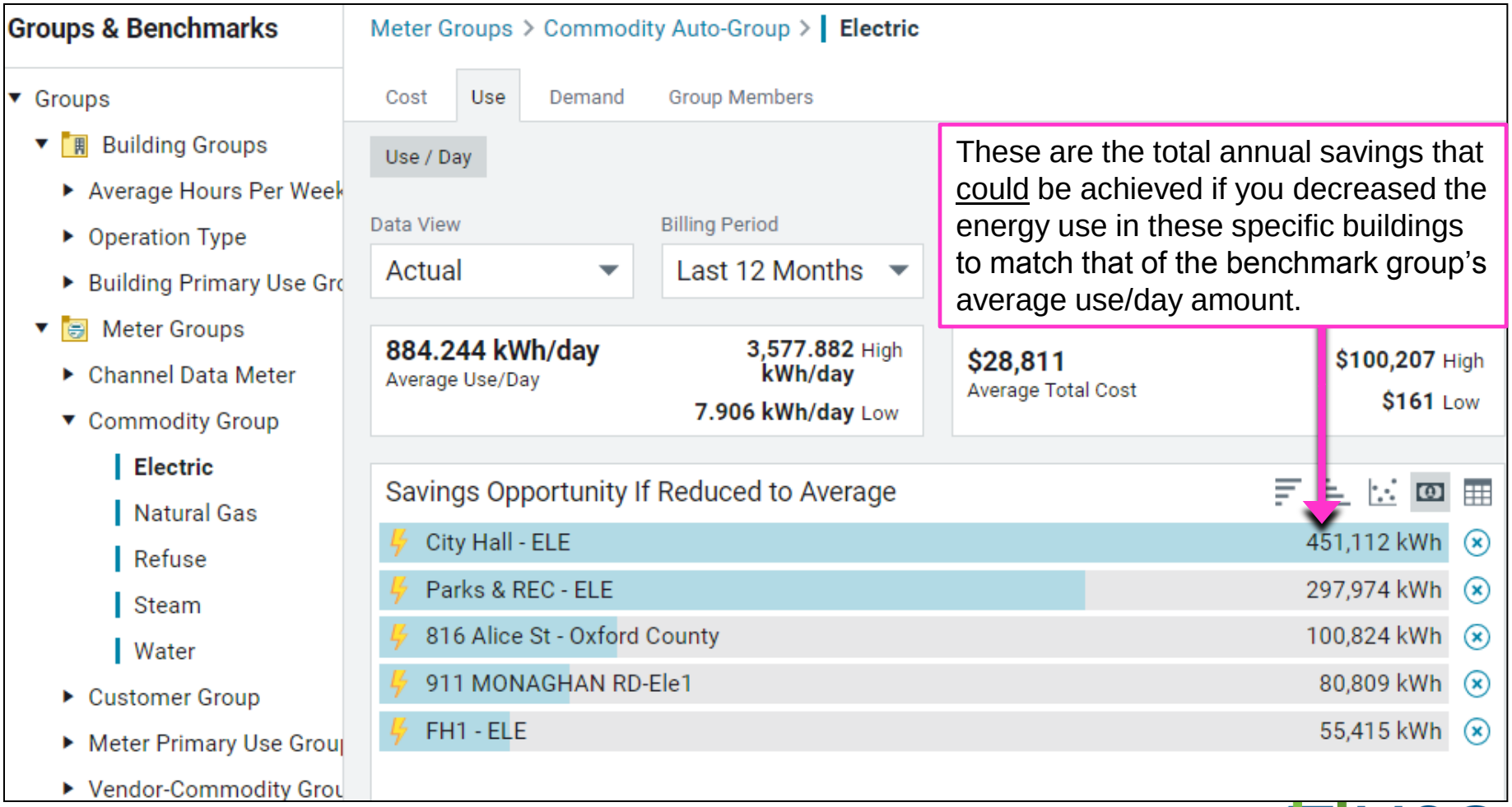
Click in the Tree hierarchy to view data for the group you wish to see.

Viewing Benchmark Comparisons



Savings Opportunities in Groups & Benchmarks

Savings opportunities are calculated using the average use or cost per day for a Group. They are shown as savings/day in Bar Graphs and as annual savings in the Savings Opportunities view.

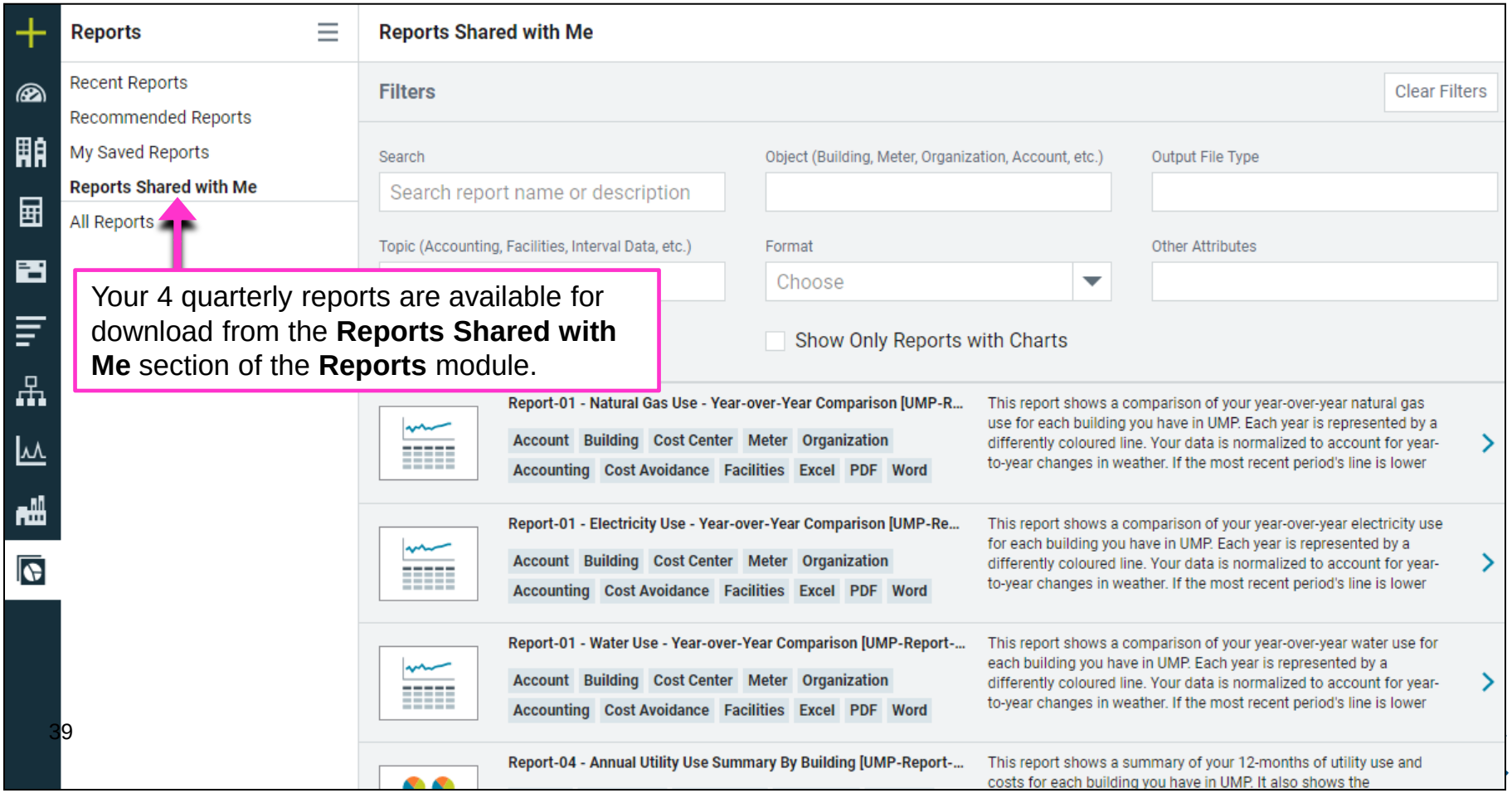


Reviewing Data: Reports

Finding Reports

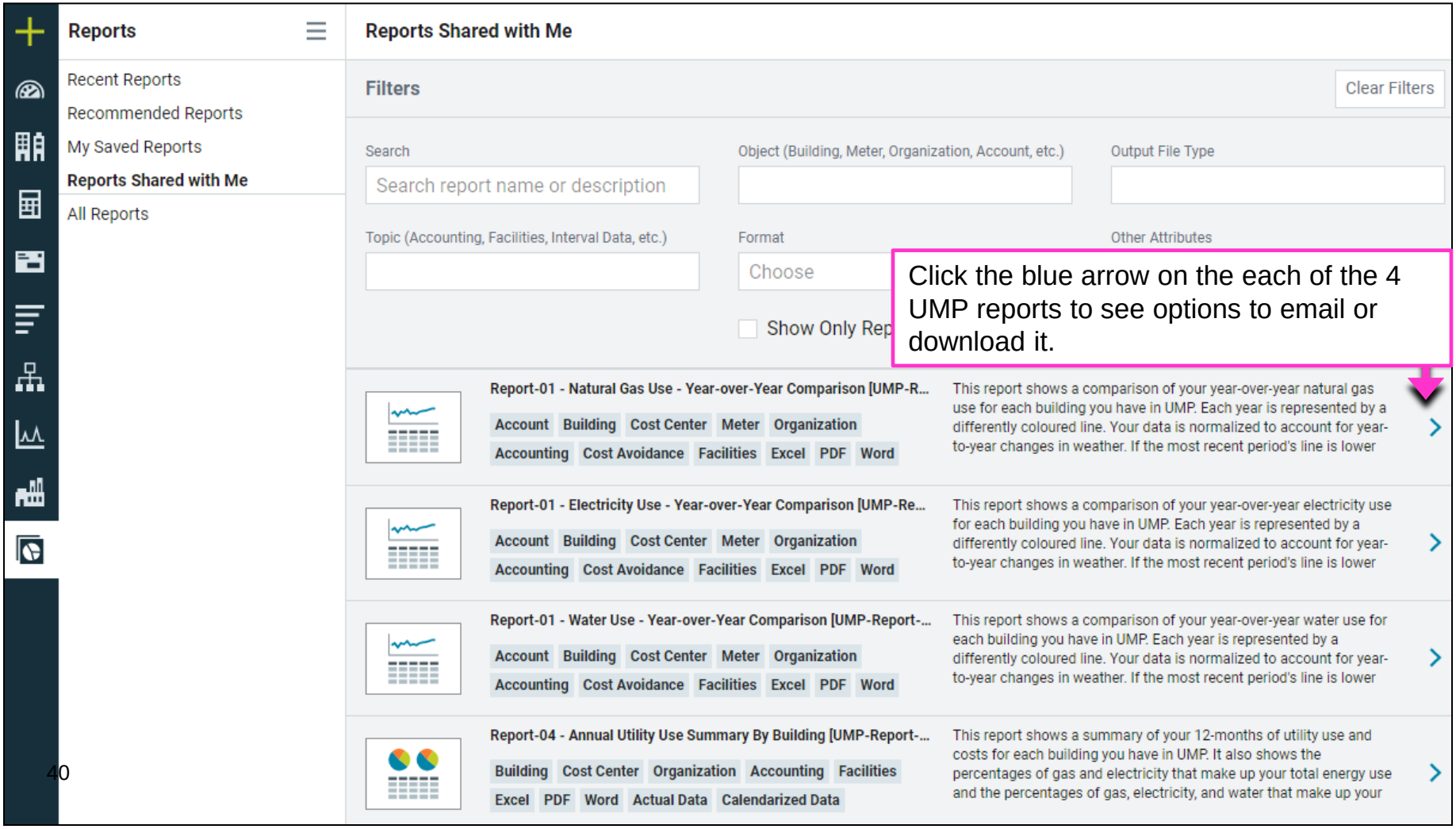
HSC has set up your 4 different quarterly reports in the **Reports** module under **Reports Shared with Me**. They include:

- **Year-over-Year Use Comparison:** 1 report each for natural gas, electricity, and water comparing your usage over multiple years
- **Annual Utility Use Summary:** shows 12 months of utility use and costs in pie-chart summaries



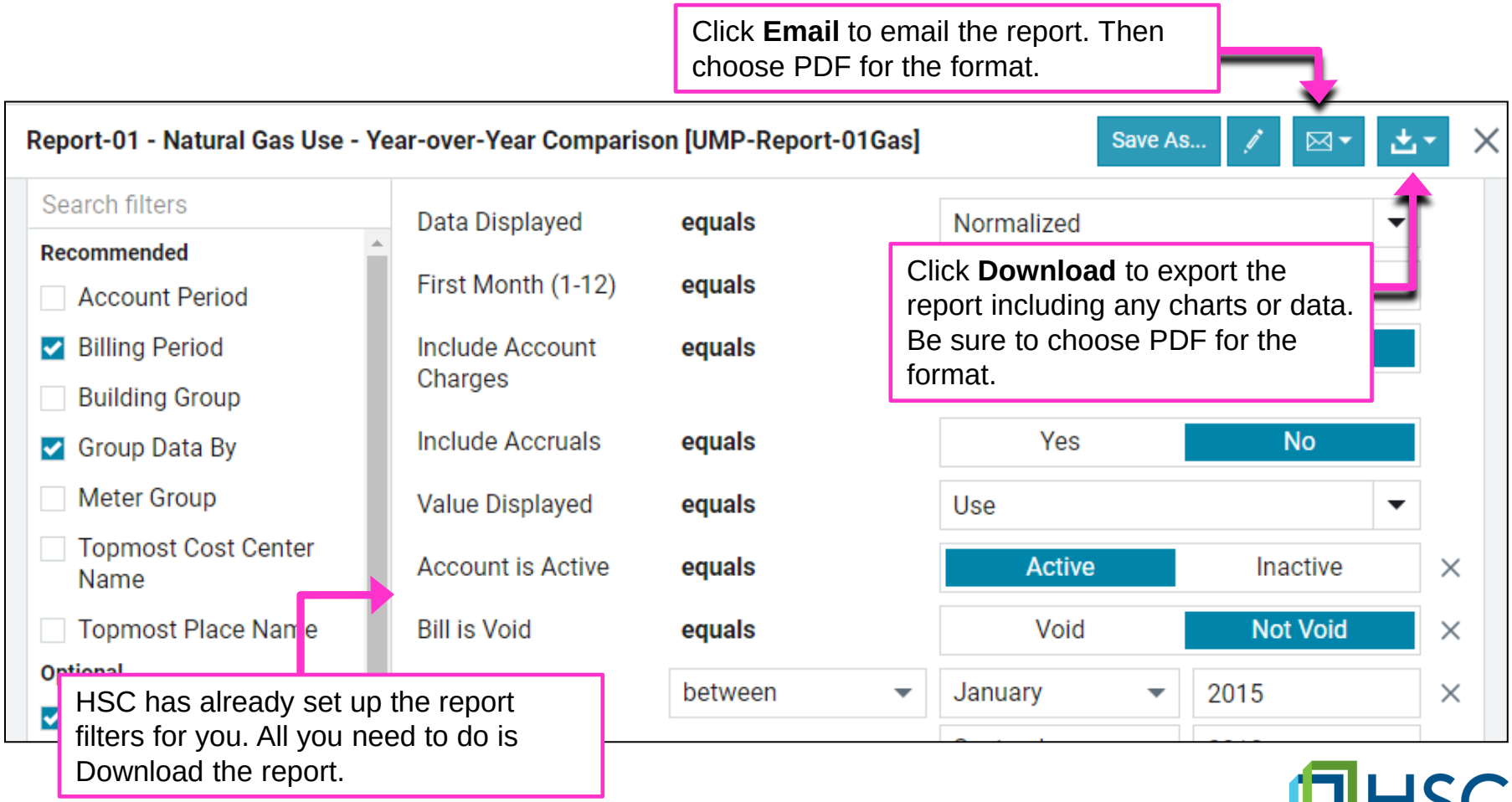
Your Quarterly Reports

Each quarter, we'll email you to let you know your quarterly UMP reports are ready. You can then download the reports from the online system.



Emailing or Downloading a Report

After you click the blue arrow to choose one of your quarterly UMP reports, you can email or download it. HSC has already set up the shared reports for you so that they are ready for export. PDF is the most attractive format for export.

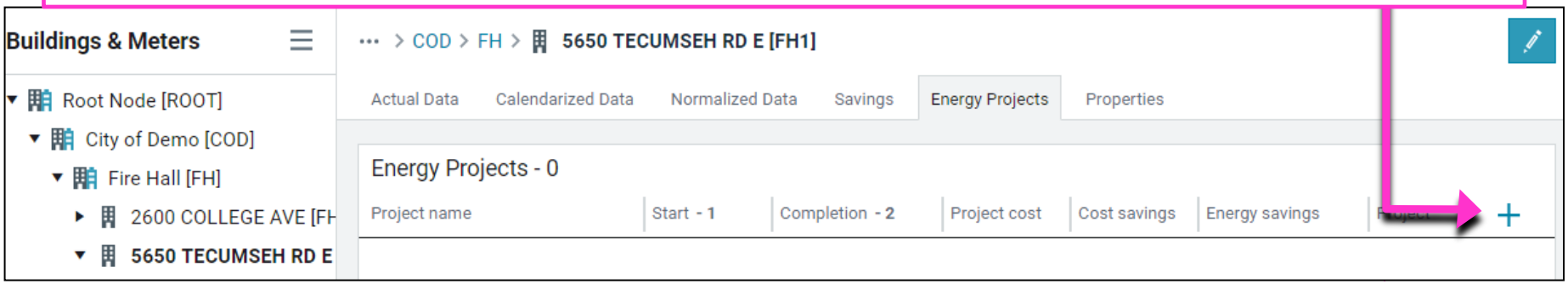


Tracking Projects:
Energy Projects Tab

Adding Energy Projects

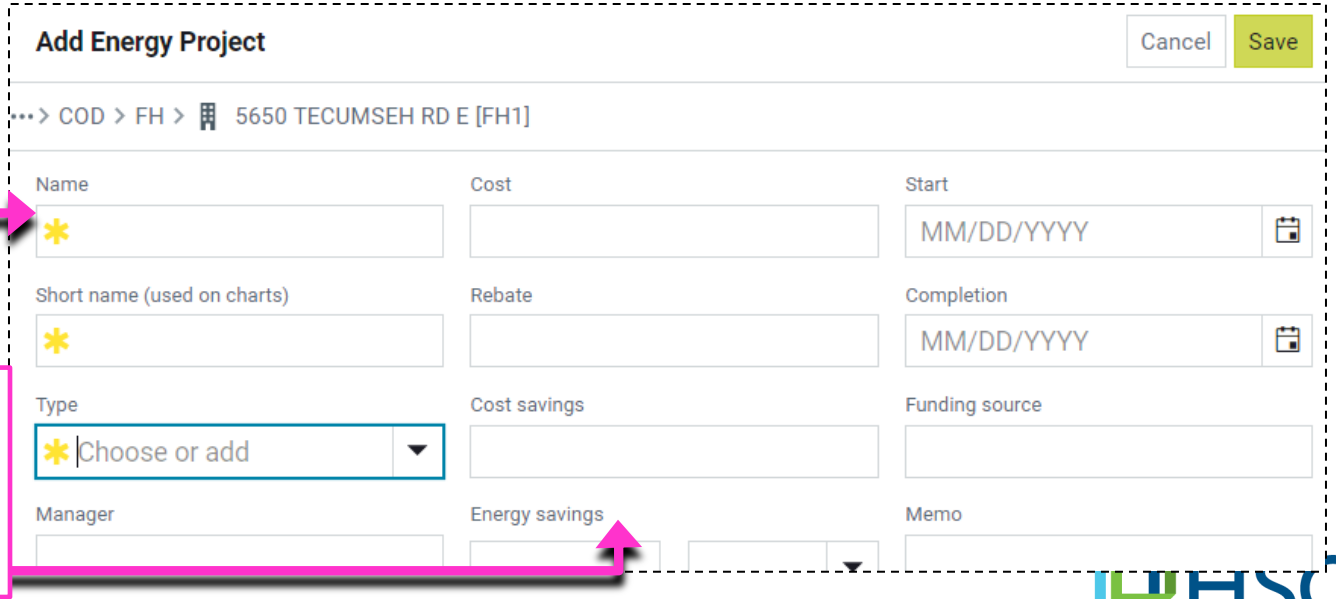
Projects are tracked in the **Buildings & Meters** module at the **Building** level <u>only</u>.

To view or add a project, select the **Building** where the project is taking place and click the **Energy Projects** tab. Click the **Plus** icon to add a new project.



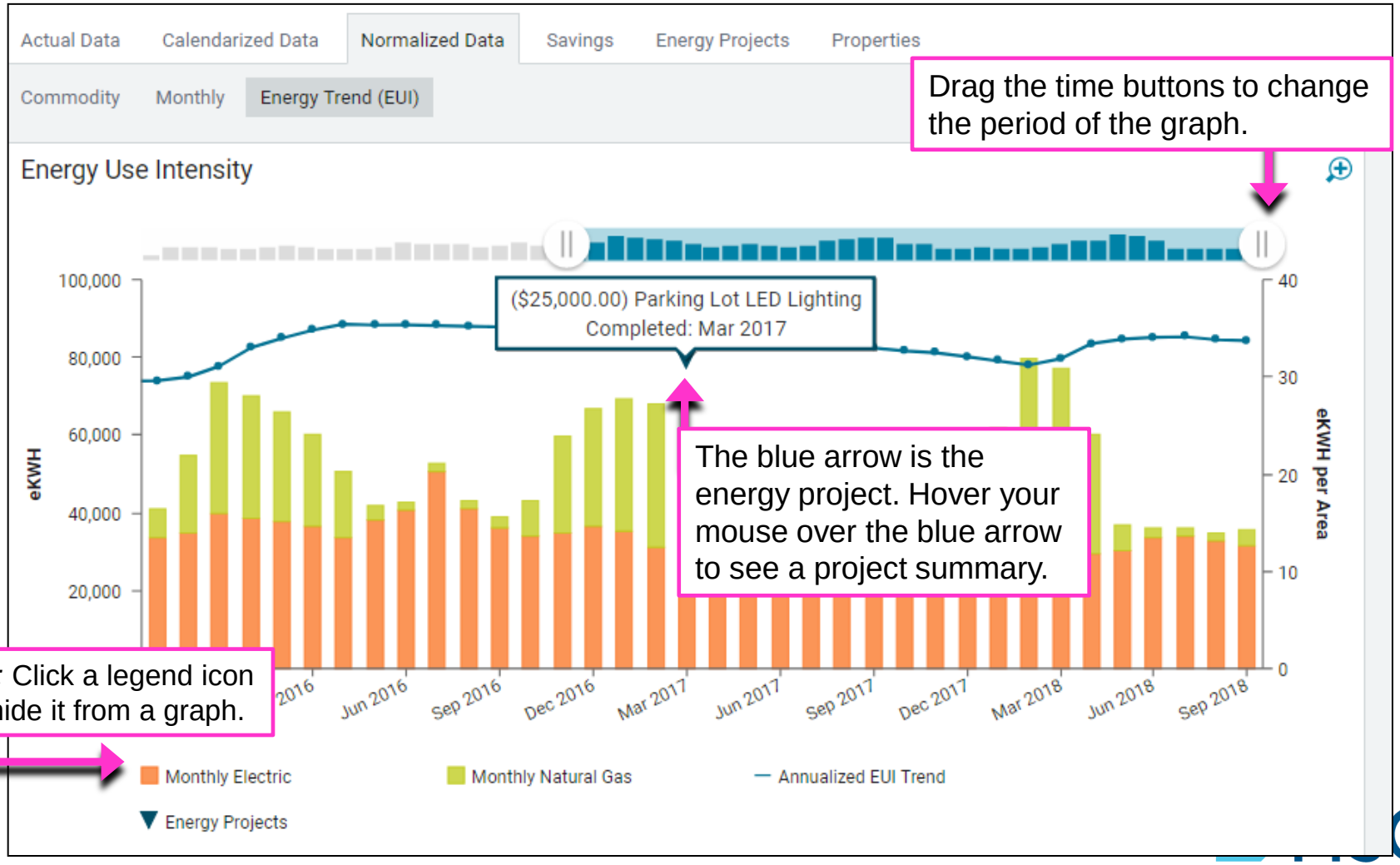
For each project, enter the details in the pop-up **Add Energy Project** box. Always give each project a unique name.

You can enter the project Cost, Rebate, Cost Savings, and Energy Savings provided by your contractor.



Viewing Results

At the **Building** level, click the **Normalized Data** tab, then the **Energy Trend (EUI)** subtab to see project tracking results.



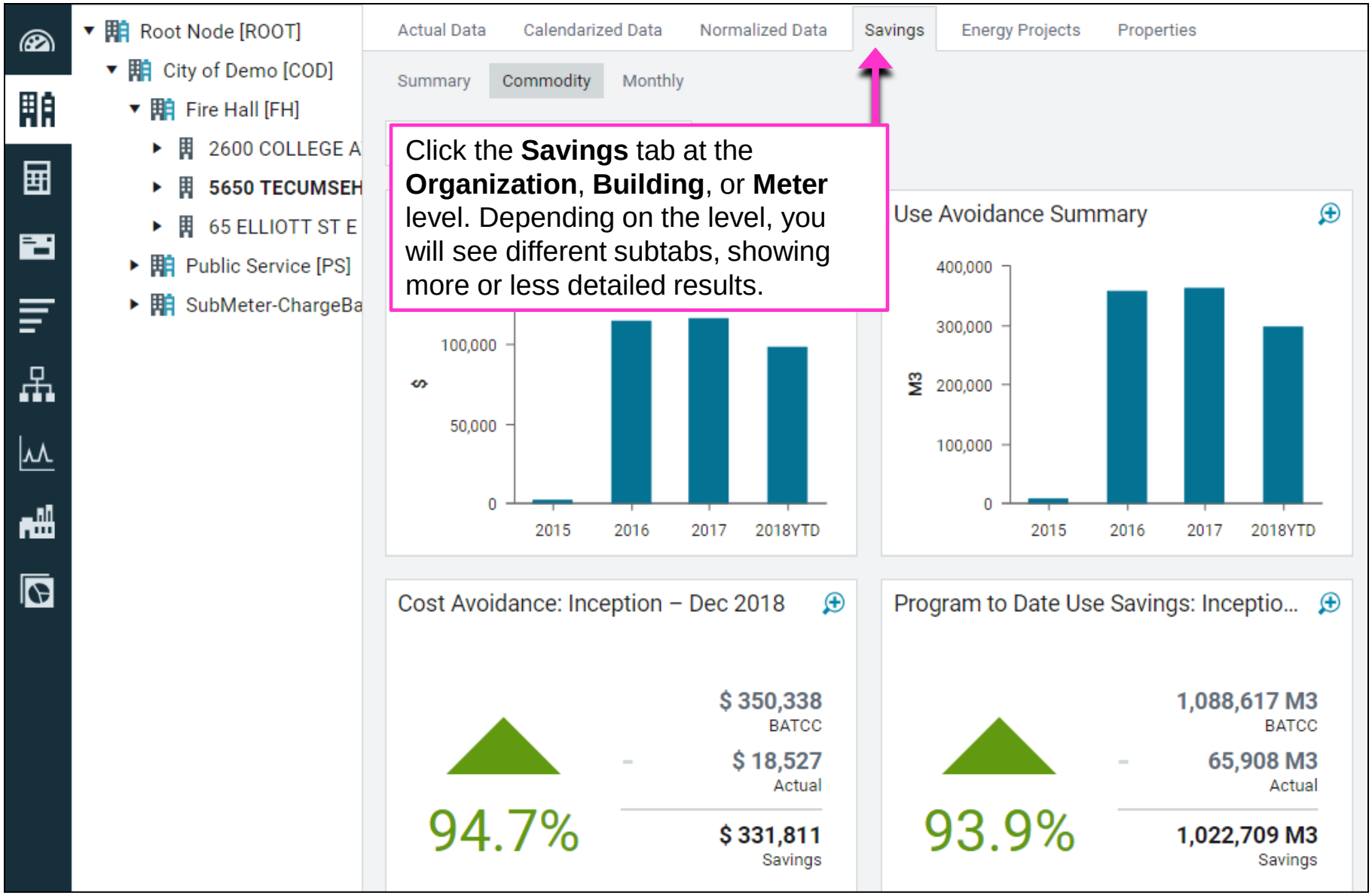
Tip: Click a legend icon to hide it from a graph.

Viewing Utility Savings: Avoided Use

Savings: “Use Avoidance”

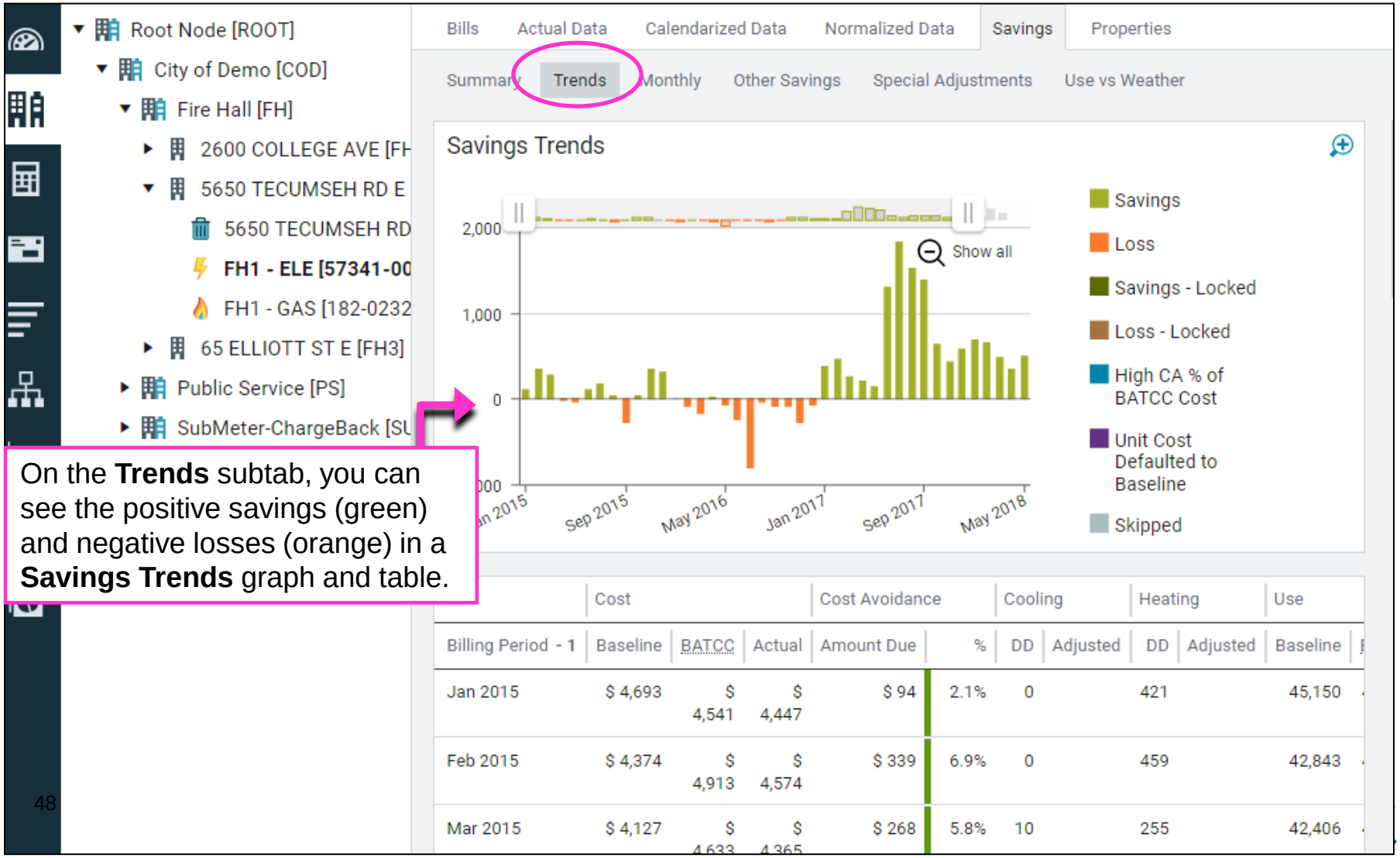
- Shows savings achieved from energy projects and any operational changes
- Compares building’s consumption to a Base Year
- Factors out weather impacts
- Positive savings represent reduced consumption; negative savings mean increased consumption
- Where no project was done, savings are due to:
  - Increased or decreased efficiency of equipment
  - Better or worse operations and maintenance
  - Shutting down or turning on equipment since base year

Viewing Savings



Details at the Meter Level

See a detailed view of savings over time in the **Trends** subtab at the **Meter** level.

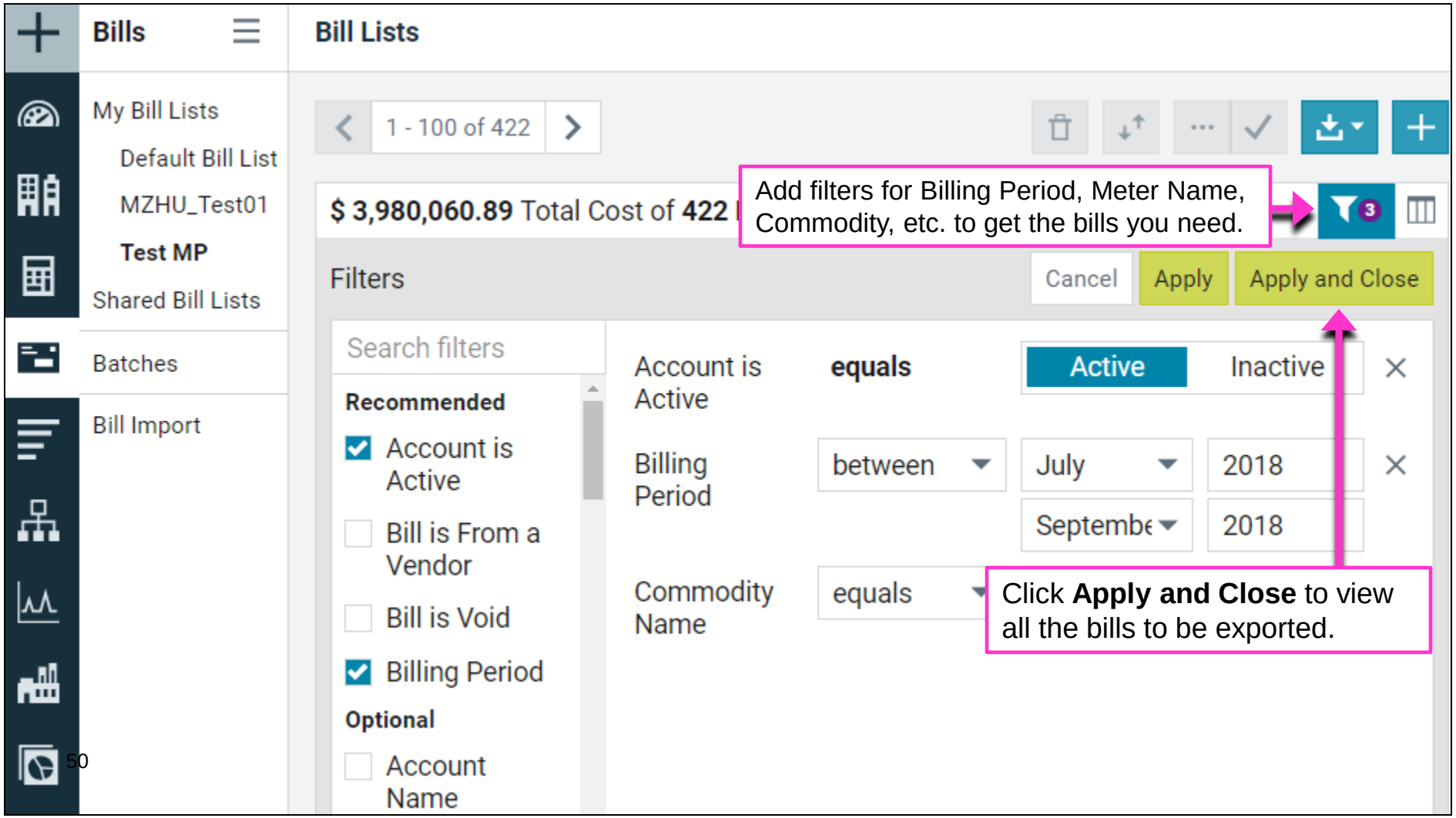


On the **Trends** subtab, you can see the positive savings (green) and negative losses (orange) in a **Savings Trends** graph and table.

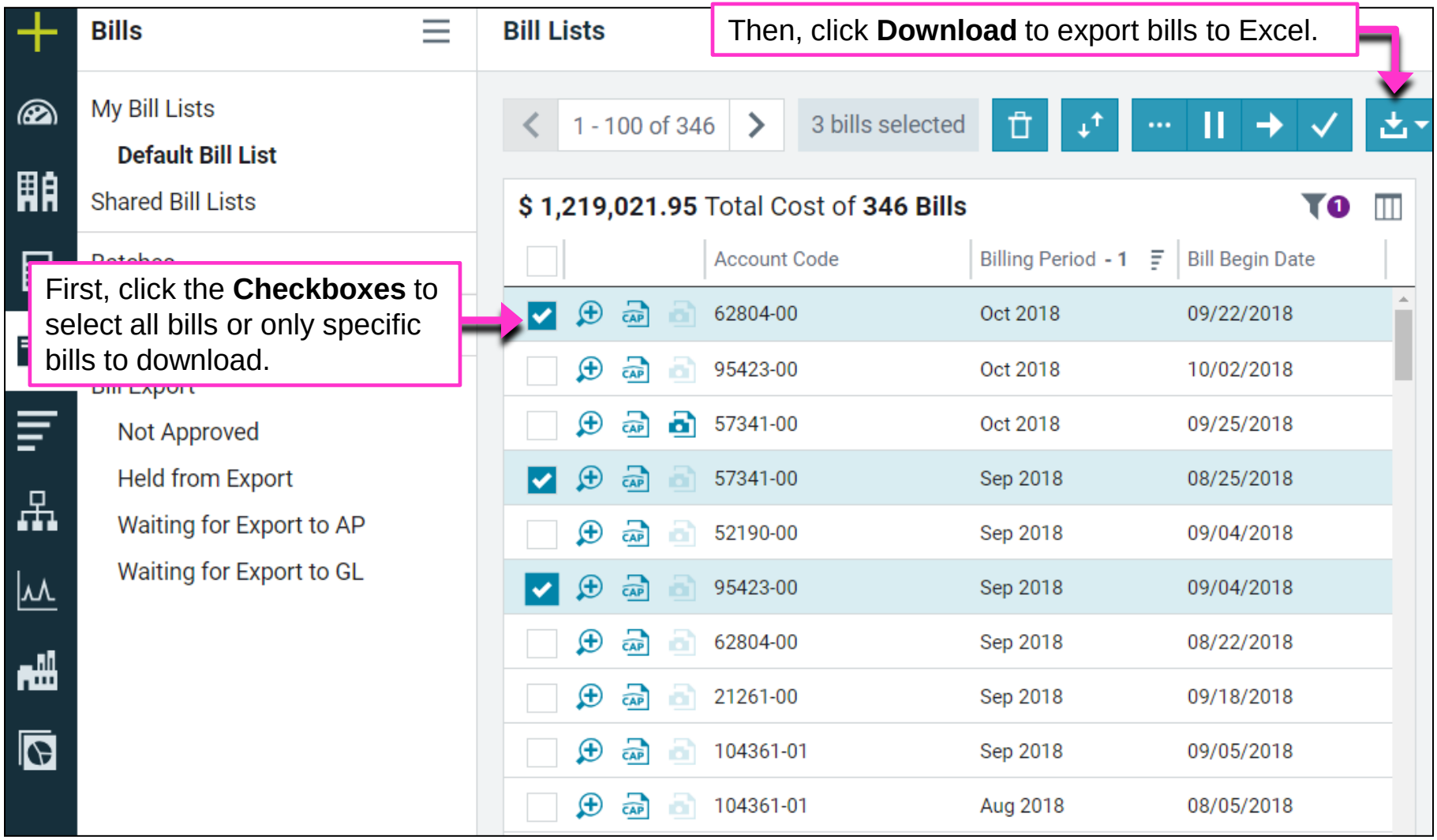
Exporting Data: Bill Lists

Using Bill Lists to Export Bill Data

You can export billing data using Bill Lists under **Bills**. To create a new bill list for export, click on **My Bill Lists** on the left side, and then on the **Plus** icon on the right side.



Downloading Bill Data from the Bill List

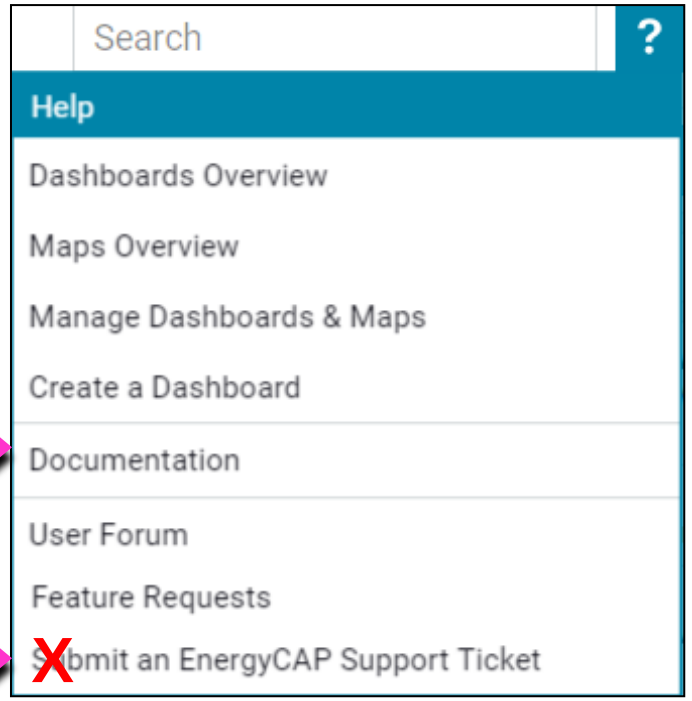


Getting Help

Help & Support

Questions?
Contact HSC Energy Services: energyservices@hscorp.ca

In UMP: Click the **?** icon for help on the specific module you're in



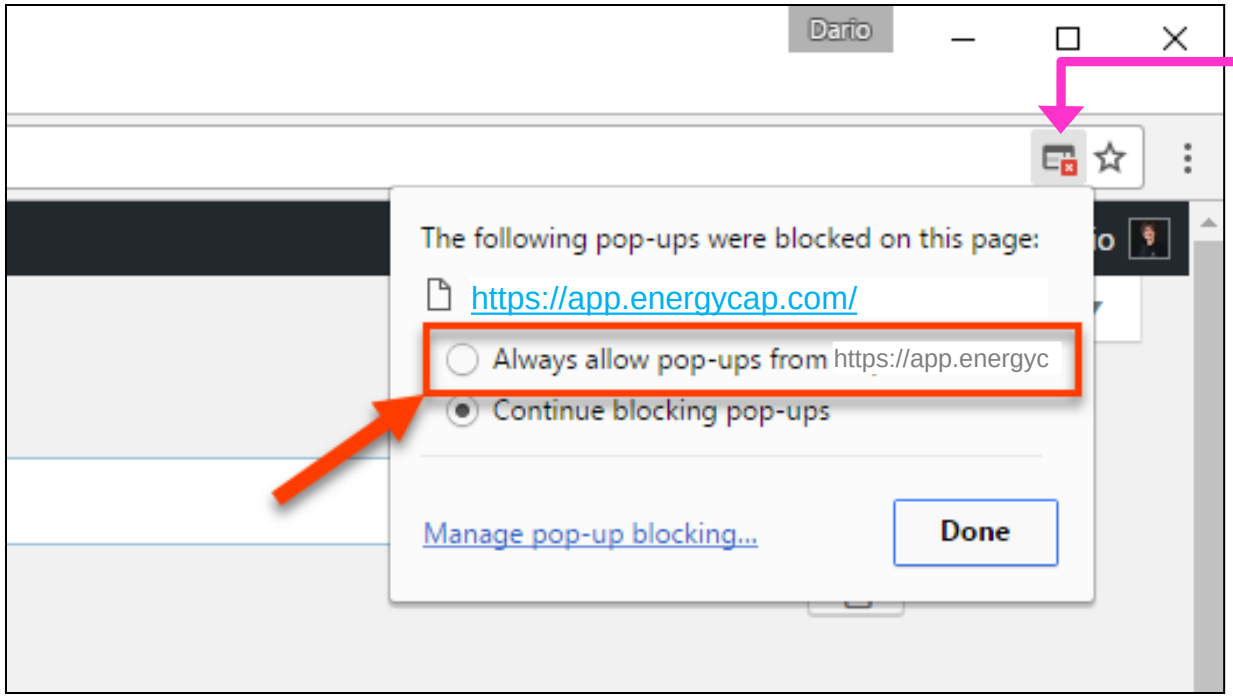
Help Centre: searchable database of explanations by topic

Please do not submit a support ticket.
Please email energyservices@hscorp.ca to have your question addressed.

Allowing Pop-up Boxes in Your Internet Browser

Always Allow “Pop-ups” for UMP

- UMP uses Pop-ups to export reports and other data
- Make sure your Internet Browser (Chrome or Firefox) allows “Pop-ups” for the UMP website



If you see this icon in the Address Bar of your Internet Browser, it means Pop-ups boxes are blocked. Click the icon. Then click on **Always allow pop-ups** and then click **Done**.

Questions?
Contact HSC Energy Services

HSC Energy Services

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