Web Users Guide

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We appreciate your business and are confident that you will be fully satisfied. To activate your warranty and assure you receive the best support possible, register your product on our web site at www.instepsoftware.com/support. Should you have any comments on ways we could improve EBS Web, we would appreciate hearing from you.

The ISS EBS Team

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Contents

Chapter 1: Getting Started ........1
What is the EBS Web? ......................... 2
System requirements ........................ 2
Logging into EBS ............................. 2
The EBS Home page ......................... 3
  The program menu .......................... 3
  Home .................................... 3
  Log Out ................................ 3
  Hide/Show Tree ............................ 3
The function menu ............................ 4
  Buildings ................................ 4
  Reports ................................ 4
  Navigation area ........................... 4
Removing buildings from a favorite ....... 11
Saving favorites ............................. 11
Using the Search control .................... 12
  Searching building information ............ 12
  Loading more search results ............... 12
  Sorting search results ........................ 13
  Viewing building details and meters ........ 13
  Adding building to selections box .......... 13
Selections Box .............................. 14
Building Details and Meters ............... 15
  Sorting meters table ....................... 15
  Loading trends ........................... 15
  Exporting trend data ........................ 15
Chapter 3: Creating Trends .......... 19
What are trends? ............................ 20
Loading trends ............................. 20
  Trend options ........................... 20
Exporting trends ........................... 22
Printing trends ............................. 22
Chapter 4: Displaying & Printing Reports .......................................... 29

What are reports? ......................................................... 30
Displaying a report ...................................................... 31
Sorting a report .......................................................... 32
Navigating a report ....................................................... 33
Exporting a report ....................................................... 33
Chapter 1: Getting Started

What is the EBS Web? .................................. 2
System requirements ................................. 2
Logging into EBS .................................... 2
The EBS Home page ................................. 3
  The program menu ................................ 3
  Home ............................................. 3
  Log Out .......................................... 3
  Hide/Show Tree ................................. 3
The function menu ................................. 4
  Buildings ....................................... 4
  Reports ......................................... 4
  Navigation area ................................. 4
What is the EBS Web?

The eDNA Billing System (EBS) streamlines the process of utility metering, billing, and reporting. EBS Web provides a Web browser interface to utility information in the EBS database. EBS Web runs on a local server and provides a central point to which all the building utility information is connected. You connect to EBS Web via a standard web browser, just like you would connect to any web site.

System requirements

To use EBS Web, your PC must have a W3C HTML V4.0 compliant browser such as Microsoft Internet Explorer 6.0 (or higher). The browser must have Javascript enabled.

Logging into EBS

Note

You can obtain the URL for the EBS Web from your administrator.

To log into the EBS website:

1. Open your browser.

2. In the address field type the appropriate URL then press the Enter key. The system displays the login page.¹

3. Type your User Name and Password.

4. Click the Login button. The system displays the EBS Home page.

¹ Some installations are configured to integrate with the organization’s centralized authentication process. Please consult your system administrator for details.
The EBS Home page

The EBS Home page features four primary areas, the program menu, the function menu, Navigation, and the Information area.

The program menu

The program menu includes global functions that apply to the EBS Web portal. This includes Home, Log Out, and Hide/Show Tree.

Home

The Home function jumps the browser to the Home page from any other page in the EBS Website.

Log Out

When you click Log Out, the system logs you out of the EBS Web portal and displays the Logout page.

Hide/Show Tree

The Hide/Show Tree function toggles the visibility of the left frame (Message of the day). When the frame is hidden, the Information area takes up the whole width of the page.
The function menu

The function menu displays the EBS Web functions. This includes Buildings and Reports.

Buildings

Using the Buildings function, you can search for and display utility meter information for buildings. From this function, you can do the following:

- Display building and meter information.
- Display Trends for Total Cost, Meter Cost, and Meter Consumption.
- Query building and meter utility billing information.
- Search for buildings by Building Name, Building ID, and other relevant criteria
- Save/load buildings and trends as Favorites

The Favorites tree includes buildings that you view often and saved as favorites.

Reports

The Reports function provides a series of reports that you can display in the Information area or export to another application. You select the type of report you want to display from the Navigation area. You can customize your reports by setting filter and sort criteria.

After you display a report in the Information area, you can export it to any of the following formats:

- Adobe Portable Document Format (PDF)
- Microsoft Excel
- Rich Text Format (RTF)
- Microsoft Word

Navigation area

The navigation area changes depending on what function you select in the function menu. It provides a list, a hierarchy of choices, and/or other means by which you select or search for the items you want to view.

The navigation area provides the following information:
<table>
<thead>
<tr>
<th>Function</th>
<th>Navigation area contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home page</td>
<td>Displays favorites for buildings and trends. Favorites are preselected building/meter information or trends you saved because you view them often.</td>
</tr>
<tr>
<td>Buildings</td>
<td>There is no content in this area for the Buildings function. The area is automatically hidden.</td>
</tr>
<tr>
<td>Reports</td>
<td>Displays the Report Menu where you select the type of report you want to display.</td>
</tr>
</tbody>
</table>
Chapter 2: Using the Buildings Function

Buildings function........................................ 8

Using the Favorites control............................... 8
  Expanding buildings list............................... 9
  Viewing building details & meters..................... 9
  Loading favorites ...................................... 10
  Renaming and deleting favorites....................... 11
  Removing buildings from a favorite ................. 11
  Saving favorites ........................................ 11

Using the Search control................................. 12
  Searching building information....................... 12
  Loading more search results ......................... 12
  Sorting search results ................................ 13
  Viewing building details and meters ................. 13
  Adding building to selections box ................. 13

Selections Box ............................................. 14

Building Details and Meters ......................... 15
  Sorting meters table .................................. 15
  Loading trends ........................................ 15
  Exporting trend data .................................. 15
Buildings function

The Buildings function allows users to search for data associated with a specific building or meter. From this view, the users can quickly access the most recent readings for a meter or a building and also the meter information and historical data for a meter or a building.

Using the Buildings function, you can do the following:

- Display building and meter information.
- Display Trend plots for building cost and consumption.
- Display Trend plots for meter cost.
- Query (search for) building information.

Using the Favorites control

The Favorites control includes buildings that you view often and saved as favorites. This saves you the trouble of looking up frequently viewed buildings. There are two types of favorites: Building favorites and Trend favorites.

Building favorites include a selection of buildings.

Trend favorites include a selection of buildings as well as the trending parameters used to generate a Trend plot.
Expanding buildings list

To view the saved buildings, click on the arrows next to the favorite labels. The saved buildings are then displayed under the label.

To hide the list, click on the arrow again.

Viewing building details & meters

From the Favorites control, clicking on any building name will display the building details and meter:
Loading favorites

To load the favorites, click on the name of the Favorite.

Loading a **Buildings** favorites will load the saved buildings into the selection box. The user can generate trends with the buildings, or save them as a new Favorite.

Loading a **Trends** favorites will load the saved buildings as well as the trend parameters. It will also generate and load the saved trend.
Chapter 2: Using the Buildings Function

Renaming and deleting favorites

Right-click on the name of the Favorite to display a context menu.

Select Rename from the pop-up menu to rename the favorite.

Select Delete from to delete the favorite.

Removing buildings from a favorite

To remove a building from a Favorite, expand the Favorite to list the saved buildings. Then right-click on the name of the building and select Delete from the pop-up menu.

Saving favorites

To save the selection of buildings, click on the Save Buildings button.

To save the current trend (including building selection and trend options), click on the Save Trend button.
Using the Search control

The Search control allows the user to search for buildings. Each building that the user finds can be added to the Selection Box for trending or saving as a Favorite. The building’s details and meters can be viewed as well.

Searching building information

The user can search for buildings by entering search terms in any of the three search fields:

- BID (Building ID)
- Building Name
- Address

The fourth field, Campus, is a drop-down menu that can also be used to filter the results.

After making changes to the search terms, click on the Refresh button to refresh the search results.

Loading more search results

Only the first 100 search results are loaded at a time. To load more results, click on the buttons at the bottom of the search results.

The Show More button will load the next 100 results.

The Show All button will load all of the results for the search parameters.
Sorting search results

The search results can be sorted by any of the five fields:

- BID
- Building Name
- GSF
- Campus
- Address

Click on the header to sort the results by that field. An arrow appears next to the header to indicate descending/ascending sort order.

Viewing building details and meters

To view the details and meters of a building in the search results, click on the “Meters” icon in the left column:

Adding building to selections box

To view the details and meters of a building, click on the “Add” icon in the left column:

Multiple buildings can be added. After the user has added one or more buildings to the Selections Box, the controls in the Trending Control can be used to trend the selected buildings or save them as a favorite.
Selections Box

The **Selections Box** is where the selected buildings are displayed. For each selected building, the user can do two things:

- Click on the building name to view the building details and meters.
- Click on the button to remove the building from the Selections Box.

To clear all the selections in the Selections Box, click on the button.

See Chapter 3 for information on how to use the Trend Control underneath the Selections Box.
Building Details and Meters

The building details and meters page displays additional details related to the selected building and lists all the meters associated with the building.

Sorting meters table

To sort the meters table, click on the header of the field to sort the table by. An arrow will appear next to the header to indicate which direction it is being sorted.

Loading trends

Use the Trend Control to specify the trending options. Then click on the checkbox in the leftmost column of the meter to view the Trend of. A trend plot and raw data should be loaded at the bottom of the page. Multiple checkboxed can be selected to show the trend for multiple meters.

Exporting trend data

After trend data has been loaded, an Export Excel button becomes available. Click on this button to export the data as an Excel file.
Chapter 3: Creating Trends

What are trends? .............................................. 20

Loading trends .................................................. 20
  Trend options .................................................. 20

Exporting trends ............................................. 22

Printing trends .................................................. 22
What are trends?

Trends are graphical representations of utility cost and consumption. You can display trends for buildings and individual meters. Trend information can be based on utility cost and/or consumption.

You can display multiple trend lines on the same trend. This helps you see relationships between different sets of data. Here are some examples of how you can combine trend data on the same plot:

- A building’s Total Cost and Total Consumption
- A building’s Total Cost and the individual cost of several of the building’s meters.
- The Total Cost and or Total Consumption of one building and the Total Cost and/or Total Consumption of another building.

These are only a few examples of the combinations you can create on one trend. Within the multiple trend lines you can create on a trend, your combinations of utility data are nearly infinite.

Loading trends

There are two ways to load trends:

- Loading a trend directly from the Favorites control (see Chapter 2)
- Loading a trend based on selected buildings and trend options

Trend options

Once there are one or more buildings in the Selections Box, the user can use the Trend Controls to load a trend for the selected building(s). See Chapter 2 for information on how to select buildings.
There are five options for the trend parameters:

**Utility**

The **Utility** option can be set to trend data of a specific utility, or for all utilities combined.

If “All” utilities is selected, the **Trend Type** options with **Consumption** will be disabled.

**Year**

The **Year** option sets the date range for the data to trend. The year should be inputted as four digit years (e.g. 2010).

**Trend Type**

There are four trend types to choose from. These options control the types of data on the Y-axis (cost or consumption) and on the X-axis (months or years).

**Normalization**

The trend data can be normalized by choosing the **Per GSF** option under **Normalization**. This divides the cost/consumption data by the GSF of the building so it is easier to compare the relative values against building with different GSFs.

To disable normalization, choose the **Total** option, which trends the raw data for cost/consumption for each building.

**Degree Days**

Check the checkbox under **Degree Days** to normalize the data by degree days. This standardizes the cost/consumption data by taking degree days into consideration. Enabling this option is configurable from the web.config file.

**Combine Charts**

Selecting the Combine Charts option results in trending the multiple buildings in one chart for comparison purposes. This option is available only if the “Trend Type” is **Consumption/Cost by Month**.

After the trend options are set, and the buildings are selected, click the **Trend** button to load the trend. The raw data will also be loaded.
Exporting trends

You can export trends as an Excel file by clicking the Export Excel button.

Note that if you change the trend options or building selections, the data in the exported Excel file will reflect those changes.

Printing trends

After you display a trend, you can print it on your local printer by using the print option on your browser.
Chapter 4: Displaying & Printing Reports

What are reports? ........................................ 30
Displaying a report...................................... 31
Sorting a report ........................................... 32
Navigating a report ...................................... 33
Exporting a report...................................... 33
What are reports?

EBS reports are text listings of building and meter information presented in the information area of EBS Web. There are several types of reports you can display. You can customize the information you display by using filters and sorting the information in a specific order. Here is an example of the Reports option with a report selected:

The EBS Web may include the following reports:

- **Building report.** This report provides a reference for all buildings.
- **Metered Building Consumption.** This is currently referred to as the GUP Book.
- **Meter Billing ID.** This report includes the meters, buildings, and account information.
- **Electric Demand.** This report is for GUP meters only and is used to monitor the system and transformers.
- **Meter Billing ID Detail.** This report details all of the bills for a meter for a specified time period. It’s grouped by building, account, annual report code, and meter.
- **Utility Services Sales.** This report provides a summary of all utility cost per building for a specified time period.
Additional reports may be added in the future. After you display a report, you can export it to any of the following formats:

- Adobe Portable Document Format (PDF)
- Microsoft Excel
- Rich Text Format (RTF)
- Microsoft Word

## Displaying a report

The EBS includes several standard reports that you can display and export. You can filter a report to display the exact information you want.

### To display a report:

1. On the Function menu, select **Reports**. The system displays the list of reports.

2. In the Function Navigation area, select the report you want to display. The system displays the report Filter criteria.

   **Note**
   
   The Filter criteria varies depending on the report you select.

3. Enter the filter information as appropriate.
5. After you finish setting the filter criteria, click the **Generate Report** button. The system displays the report:

![Building Report](image)

### Sorting a report

If the report settings includes **Sorting** criteria, you can change the way the information is sorted in the report.

**To sort a report:**

1. Display the report you want.

2. Under **Sorting By**, use the **Field** drop-list box to select the field by which you want to sort the report.

3. From the **Order** drop-list, select the order for the sort: **Ascending** (lowest to highest) or **Descending** (highest to lowest).

4. Click the **Generate Report** button. The system displays the resorted report.

![Building Report](image)
Navigating a report

After you display a report, the application provides you with a navigation toolbar that you can use to navigate through the report:

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1" alt="First Page" /></td>
<td>Displays the first page of the report.</td>
</tr>
<tr>
<td><img src="image2" alt="Previous Page" /></td>
<td>Displays the previous page of the report.</td>
</tr>
<tr>
<td><img src="image3" alt="Next Page" /></td>
<td>Displays the next page of the report.</td>
</tr>
<tr>
<td><img src="image4" alt="Last Page" /></td>
<td>Displays the last page of the report.</td>
</tr>
<tr>
<td><img src="image5" alt="Go To" /></td>
<td>Type a page number in the field, then click the Go To button to display that page.</td>
</tr>
<tr>
<td><img src="image6" alt="Search" /></td>
<td>Type a portion of text, then click the Search button to display next page that contains that text.</td>
</tr>
<tr>
<td><img src="image7" alt="Zoom" /></td>
<td>Select the zoom level from the drop-list box.</td>
</tr>
</tbody>
</table>

Exporting a report

After you display a report, you can export it to any of the following formats:

- Adobe Portable Document Format (PDF)
- Microsoft Excel
- Rich Text Format (RTF)
- Microsoft Word
To export a report:

1. Display the report you want to export.

2. In the **Select file type for export** drop-list box, select the format to which you want to export the report. The system displays a dialog box requesting you to identify where to save the file.

3. Select the appropriate location for the file, then save the file.