Focus on Energy
QuickSight Participation and Performance Dashboard
User Guide

The **QuickSight** data format provides real time information on utility customer participation in the Focus on Energy program and gives the user the ability to query historical participation data.

Account access and login

1) Let Focus on Energy know you would like access to **QuickSight**.
2) You will receive an email invitation to **Join QuickSight** from **QuickSight team** that looks like this:
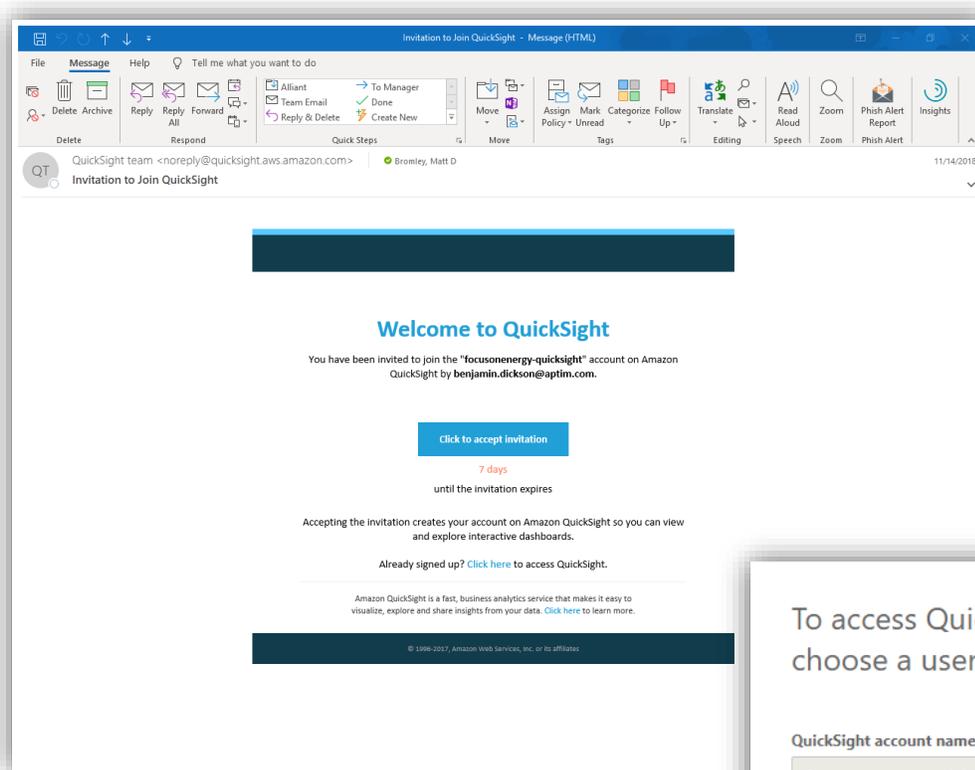
(check your spam folder if you don't receive the email)

3) To set up your account, first accept the invitation (the invitation will expire in 7 days).
4) You will then be prompted to enter a username (your email) and then create a password.
5) Once you create your password, click "Create account and sign in".

6) Now sign in to QuickSight using the username and password you just created.
7) Then click "continue".
8) Enter your username and password.
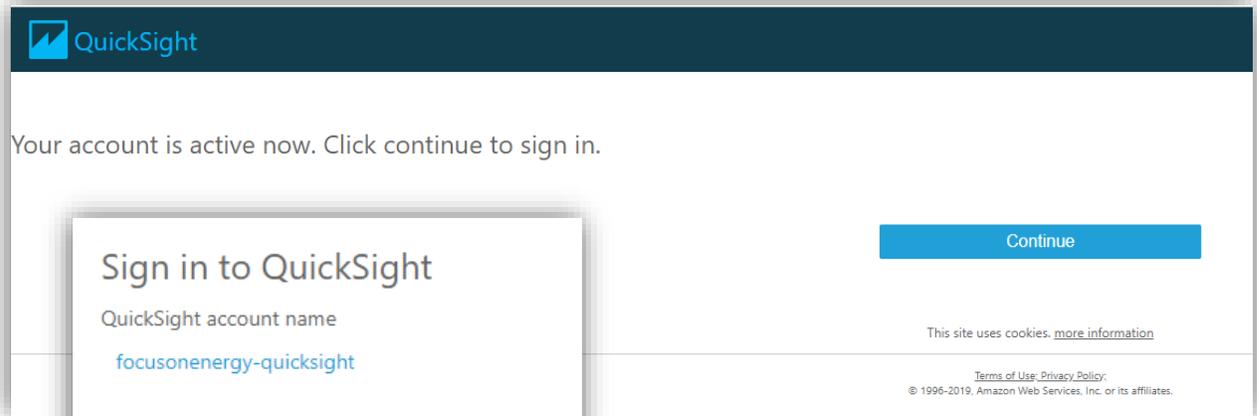
9) The first time you log in a tutorial will pop up. It is recommended that you view the tutorial before proceeding, however, you can view it later by clicking the tutorial link at the top of the page.

10) You may see a "We can't open that dashboard" message once login is complete. If so, click the white "Home" icon in the top left corner of the page. Your dashboard links should now be visible.
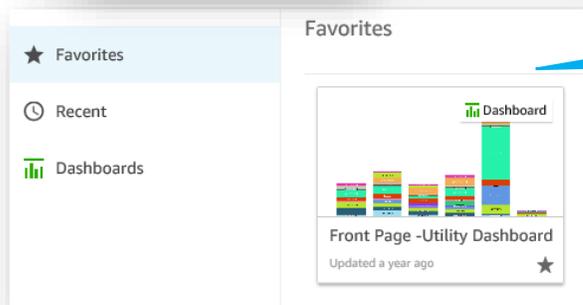
11) You may also see a "No dashboards available" message when you login. In this case you will need to click your email in the upper right corner, find the location icon in the drop down box and then pick Oregon for your location.

frank.barth@aptim.com ∨

Reports   Alerts

Email

Location icon

🌐 English   >
📍 Oregon   >
Tutorial videos
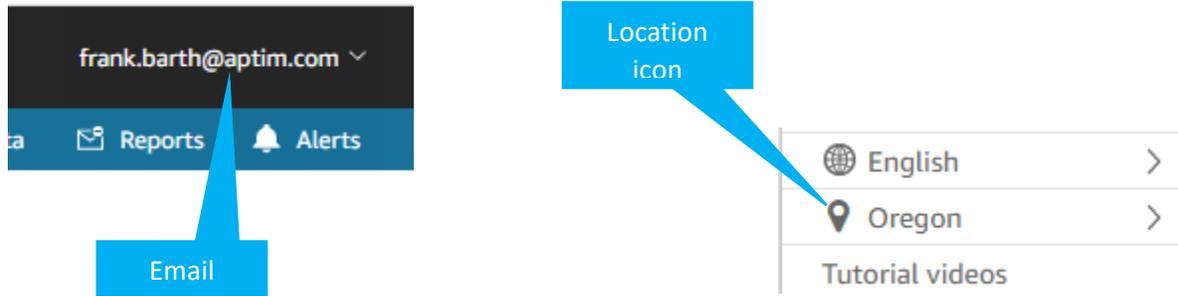
Using QuickSight

1) By clicking "Dashboards", you will see all dashboards that you have access to. You should see at least three, "Front Page Utility Dashboard", "Full Utility Report Downloader" and "All Focus Performance".

📊 Dashboards

📊 Dashboard

Front Page -Utility Dashboard
Updated 2 years ago   ★

📊 Dashboard

Full Utility Report Downloa...
Updated 2 months ago   ☆

📊 Dashboard

$12,482,760

All Focus Performance
Updated 4 months ago   ☆
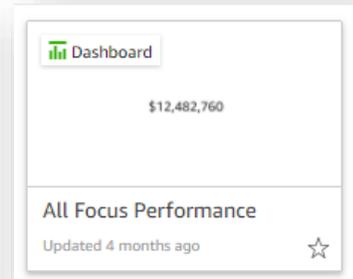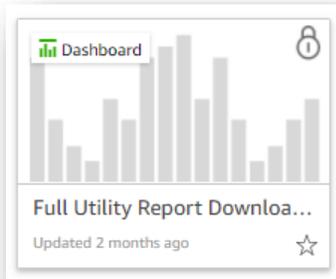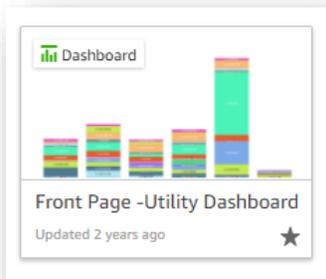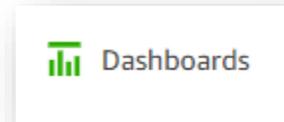
2) **Front Page Utility Dashboard** – you will see three tabs at top.
   - Front Page
   - By Program
   - Monthly Heartbeat

QuickSight

↺ Undo   ↻ Redo   ↻ Reset   ☆ new_utility_dash_for_review

Front Page   By Program   Monthly Heartbeat
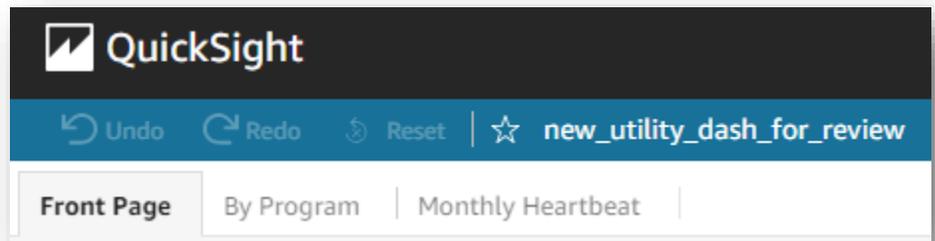
3) The **Front Page** tab shows a snapshot (bar graph) of incentives delivered, by Program solution, to utility customers or members. The report is filterable by time period, Program, Program offering and, for some users, utility. The report may be exported as a printable PDF.

🖨 Export   📋 Data   ✉ Reports

Print
Download as PDF
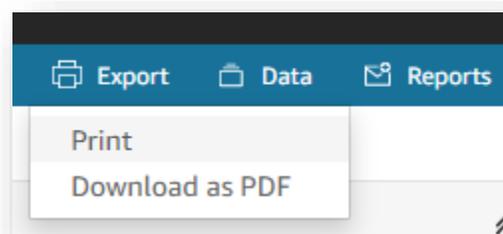
4) The **By Program** tab shows participation detail by Program offering. The report is filterable by time period, Program, Program offering and, for some users, utility. By clicking in the upper right hand corner of the report window, the report may be exported as a printable PDF and in CSV or Excel formats.

Savings by Program Offering

Program	Offering	Customer Count	Project Count	kW Savings	kWh Savi...	Therm Savi...	kWh Savings (Lifec...	Therm Savings (Lifec...	Total Incentive
Ag Propane	Ag Propane	2	2	0	0	0	0	0	$750
Business & Industry	C&I	5	5	4	50,506	0	748,902	0	$1,857
Business & Industry	Large Industrial	1	1	12	74,256	0	1,113,840	0	$2,600

Export to CSV
Export to Excel

5) The **Monthly Heartbeat** tab shows monthly incentives and customer counts by Program offering. The report may be filtered by time period, Program, Program offering and, for some users, utility.
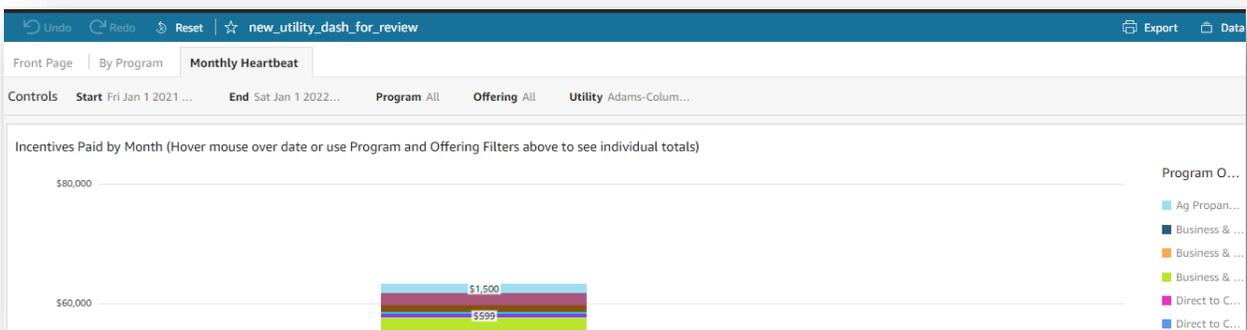
6) **Full Utility Report Downloader –** includes detailed participation information. This report can be filtered by numerous categories, including time period, Program and Program offerings, and it may be exported in CVS or Excel formats. Some users may filter by participating utility.

7) **All Focus Performance** – shows Program performance by offering. Can be filtered by year(s) or month.