## 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:

| 🗒 🗇 🔿 ↑ ↓ ≆ Invitation to Join QuickSight - Message (HTML)  |  |
|---|--|
| File       Message       Help       C Tell me what you want to do         Image: State of the state of | P     Ail     Phinh Alert     Insights       Ng     Spreech     Zoom     Phinh Alert     Insights       11/14/2018     T1/14/2018     T1/14/2018 |
| Welcome to QuickSight<br>You have been invited to join the "focusonenergy-quicksight" account on Amazon<br>QuickSight by benjamin.dickson@aptim.com.  |  |
| Click to accept invitation<br>7 days<br>until the invitation expires<br>Accepting the invitation creates your account on Amazon QuickSight so you can view  |  |
| and explore interactive dashboards.<br>Already signed up? Click here to access QuickSight.  | _  |
| Annacco QuickGight is a faut, huchnes analytics service that makes it exp to<br>visualite, explore and share insights from your data. Click here to learn more.   | To access QuickSight,<br>choose a user and password<br>QuickSight account name<br>focusonenergy-quicksight                                       |
| (check your spam folder if you don't receive the  | Email address  |
| email)  | frank.barth@aptim.com  |
| B) To set up your account, first accept the invitation  | Username   |
| (the invitation will expire in 7 days).   | frank.barth@aptim.com  |
| <ul> <li>You will then be prompted to enter a username<br/>(your email) and then create a password.</li> <li>Open your proster your password, disk "Create</li> </ul>   | Password   |
| account and sign in".   | Confirm password 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.

| QuickSight Your account is active now. Click continue to sign in  | ı.  |
|---|---|
| Sign in to QuickSight<br>QuickSight account name<br>focusonenergy-quicksight                              | Continue<br>This site uses cookies. <u>more information</u><br><u>Terms of Use: Privacy Policy:</u><br>@ 1996-2019, Amazon Web Services, Inc. or its affiliates.  |
| Email address or username<br>john@email.com<br>Password<br>I have an MFA token                            | <ul> <li>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.</li> </ul> |
| Sign in<br>Forgot Password?   Identity Provider Sign-in<br>Not signed up for QuickSight yet? Sign up here | vetcome to QuickSight ×   |

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.

|  | <b>Quick</b>  | KSight Home icon |                   |
|--|---|------------------|-------------------|
| "We can't open<br>that dashboard<br>message" | <ul> <li>★ Favorites</li> <li>③ Recent</li> <li>↓ Dashboards</li> </ul> | Favorites        | 11)<br>Dashboards |

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.



## Using QuickSight

lu Dashboard

Updated 2 years ago

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".

III Dashboard

Updated 2 months ago

Full Utility Report Downloa...

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|------------|--------------|
|            | \$12,482,760 |
|            |              |
|            |              |
|            | Dorformanco  |

**Dashboards** 

- 2) Front Page Utility Dashboard - you will see three tabs at top.
  - Front Page

Front Page -Utility Dashboard

\*

- 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 |           |
|          |        | 3         |

**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.

| avings by Hogram offen | ing              |                |               |            |          |            |                    |                      |                 |                 |
|------------------------|------------------|----------------|---------------|------------|----------|------------|--------------------|----------------------|-----------------|-----------------|
| 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         | Export to CSV   |
| Business & Industry    | Large Industrial | 1              | 1             | 12         | 74,256   | 0          | 1,113,840          | 0                    | \$2,600         | Export to Excel |
|                        |                  |                |               | 2.47       | 777.450  | 0          |                    | 0                    | ±63.040         |                 |

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.

| ⊖ Undo  | 🛱 Export 🏛 Da |
|---|---------------|
| ont Page By Program Monthly Heartbeat   |               |
| trols Start Fri Jan 1 2021 End Sat Jan 1 2022 Program All Offering All Utility Adams-Colum                        |               |
| centives Paid by Month (Hover mouse over date or use Program and Offering Filters above to see individual totals) |               |
| \$80,000  | Program O.    |
|   | Ag Propan.    |
|   | Business &    |
|   | Business &    |
| 51 500  | Business &    |
| \$60,000  | Direct to C.  |
| \$599   | Direct to C   |

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.

| Controls Start Date Wed Ja | n 01 20 End Date F        | ri Dec 31 202 Program All           | Offering All Focus Portfo | lio All Customer Sector All Measure G    | roup All Measure Category  | All |
|----------------------------|---------------------------|-------------------------------------|---------------------------|--|----------------------------|-----|
| Utility Report Download -  | Click Top Right Corner of | this table and select 'Export to CS | V                         |  |                            |     |
| Utility                    | Customer Name             | Program                             | Offering                  | Measure Master Name                      | Primary Email from Account | Pr  |
| null                       | Focus Upstream Store      | Direct to Customer Solutions        | Income Qualified          | LED, Omnidirectional, 310-749 Lumens, In | null                       | nu  |
| Adams-Columbia Electric    | AD Mead                   | Direct to Customer Solutions        | Packs                     | Advanced Power Strip, Pack-based, APS Ti | admead911@ç                |     |
| Adams-Columbia Electric    | AD Mead                   | Direct to Customer Solutions        | Packs                     | DHW Temperature Turn Down, Pack-based    | admead911@c Export to 0    | CSV |
| Additis-Columbia Electric  |                           |                                     |                           |  |                            | _   |

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

