

Building Manager Online (BMO) Version 3.0

User's Guide

Setup and Operation Manual







Table of Contents

Account Registration	6
Account Login	9
Base Modules	10
Base Module: Adding Meters	10
Base Module: Dashboard	15
Base Module: Dashboard > System Network	16
Base Module: Dashboard > Alarms	17
Base Module: Groups	18
Base Module: Groups > Status	18
Base Module: Groups > Consumption Report	19
Base Module: Hubs	21
Base Module: Groups > Hubs > Status	22
Base Module: Groups > Hubs > Alarm Notification	23
Base Module: Groups > Hubs > Configuration	26
Base Module: Groups > Hubs > Upload Log	31
Base Module: Groups > Hubs > Share Hub	32
Base Module: Groups > Hubs > Remove Hub	35
Base Module: Devices	37
Base Module: Groups > Hubs > Devices > Status	38
Base Module: Groups > Hubs > Devices > Graphs	39
Base Module: Groups > Hubs > Devices > Configuration	42
Base Module: Groups > Hubs > Devices > View Data	44
Base Module: Groups > Hubs > Devices > Export Data	46
Base Module: Groups > Hubs > Devices > Data Format	48
Base Module: Groups > Hubs > Devices > Remove Device	49
Code Compliance Module: Overview	51
Code Compliance Module: Building Setup	52
Code Compliance Module: Building Setup > Add New Building	53
Code Compliance Module: Building Setup > Edit Building	55
Code Compliance Module: Building Setup > Remove Building	56

Code Compliance Module: Building Setup > Adding a Removed Building	57
Code Compliance Module: Code Compliance Setup	58
Code Compliance Module: Virtual Meters	59
Code Compliance Module: Virtual Meters > Add	59
Code Compliance Module: Virtual Meters > Edit	64
Code Compliance Module: Virtual Meters > Remove	65
Code Compliance Module: Virtual Meters > Adding a Removed Virtual Meter	67
Code Compliance Module: Virtual Meters > View Data	68
Code Compliance Module: Virtual Meters > Graph	69
Code Compliance Module: Virtual Meters > Export	72
Code Compliance Module: Code Compliance Reports	73
Code Compliance Module: Code Compliance Reports > Configuration	74
Code Compliance Module: Code Compliance Reports > View Data	76
Code Compliance Module: Code Compliance Reports > Graph	77
Code Compliance Module: Code Compliance Reports > Export	80
Executive Reporting Module: Overview	82
Executive Reporting Module: Building Setup	83
Executive Reporting: Building Setup > Add New Building	85
Executive Reporting: Building Setup > Edit Building	86
Executive Reporting: Building Setup > Dashboard	87
Executive Reporting: Building Setup > Dashboard > Reports > Add Report	88
Executive Reporting: Building Setup > Dashboard > View Data	89
Executive Reporting: Building Setup > Dashboard > Graph	90
Executive Reporting: Building Setup > Dashboard > Export	93
Executive Reporting: Building Setup > Dashboard > Configuration	94
Executive Reporting Module: Building Portfolio Setup	96
Executive Reporting: Building Portfolio Setup > Add Building Portfolio	97
Executive Reporting: Building Portfolio Setup > Edit Building Portfolio	97
Executive Reporting: Building Portfolio Setup > Remove Building Portfolio	98
Executive Reporting: Building Portfolio Setup > Adding a Removed Building Portfolio	100
Executive Reporting: Building Portfolio Setup > Reports	101
Executive Reporting: Building Portfolio Setup > Reports > View Data	101

Executive Reporting: Building Portfolio Setup > Reports > Graph	103
Executive Reporting: Building Portfolio Setup > Reports > Export	104
Executive Reporting Module: Virtual Meters	107
Executive Reporting: Virtual Meters > Add	108
Executive Reporting: Virtual Meters > Edit	112
Executive Reporting: Virtual Meters > Remove	113
Executive Reporting: Virtual Meters > Adding a Removed Virtual Meter	114
Executive Reporting: Virtual Meters > View Data	116
Executive Reporting: Virtual Meters > Graph	117
Executive Reporting: Virtual Meters > Export	120
Executive Reporting Module: Executive Reporting Dashboard	121
Executive Reporting Module: Executive Reporting Dashboard > Edit	122
Executive Reporting Module: Executive Reporting Dashboard > Edit > Add Widget	122
Executive Reporting Module: Executive Reporting Dashboard > Edit > Edit Dashboard	138
Executive Reporting Module: Executive Reporting Dashboard > Edit > Save	140
Executive Reporting Module: Executive Reporting Dashboard > Edit > Undo	140
Executive Reporting Module: Executive Reporting Alerts Overview	140
Executive Reporting Module: Executive Reporting Alerts > Add	141
Executive Reporting Module: Executive Reporting Alerts > Edit	144
Executive Reporting Module: Executive Reporting Alerts > Remove	144
Executive Reporting Module: Executive Reporting Alerts > Adding Removed Alerts	145
Executive Reporting Module: Executive Reporting Alerts > Contacts > Add	146
Executive Reporting Module: Executive Reporting Alerts > Contacts > Deactivate/Activate/Delete	e 147
Executive Reporting Module: Executive Reporting Base Case Overview	148
Executive Reporting Module: Executive Reporting Base Case > Add	149
Executive Reporting Module: Executive Reporting Base Case > Add > Create Base Case from Met	er 149
Executive Reporting Module: Executive Reporting Base Case > Add > User Entered Base Case	150
Executive Reporting Module: Executive Reporting Base Case > Edit	151
Executive Reporting Module: Executive Reporting Base Case > Remove	153
Executive Reporting Module: Executive Reporting Base Case > Adding Removed Base Case	153
Executive Reporting Module: Executive Reporting Building Goals Overview	154
Executive Reporting Module: Executive Reporting Building Goals > Add	155

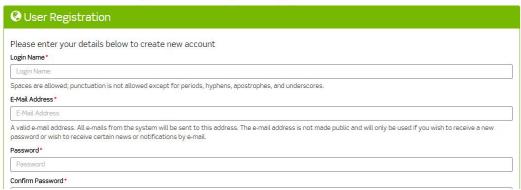
Executive Reporting Module: Executive Reporting Building Goals > Edit	157
Executive Reporting Module: Executive Reporting Building Goals > Remove	159
Executive Reporting Module: Executive Reporting Building Goals > Adding a Removed Goal	160
Tenant Billing Module:	161
Tenant Billing Module: Building Setup	163
Tenant Billing Module: Building Setup > Add New Building	164
Tenant Billing Module: Building Setup > Edit Building	165
Tenant Billing Module: Building Setup > Remove Building	166
Tenant Billing Module: Building Setup > Adding a Removed Building	167
Tenant Billing Module: Building Setup > Units	168
Tenant Billing Module: Building Setup > Units > Add	168
Tenant Billing Module: Building Setup > Units > Edit	169
Tenant Billing Module: Building Setup > Units > Remove	170
Tenant Billing Module: Building Setup > Units > Adding a Removed Unit	171
Tenant Billing Module: Building Setup > Units > Assign Meter	172
Tenant Billing Module: Building Setup > Units > Edit	175
Tenant Billing Module: Building Setup > Units > Unassign Meter	175
Tenant Billing Module: Tenant Setup	177
Tenant Billing Module: Tenant Setup > Add Tenants	177
Tenant Billing Module: Tenant Setup > Edit Tenants	179
Tenant Billing Module: Virtual Meters	180
Tenant Billing Module: Virtual Meters > Add	181
Tenant Billing Module: Virtual Meters > Edit	186
Tenant Billing Module: Virtual Meters > Remove	187
Tenant Billing Module: Virtual Meters > Adding a Removed Virtual Meter	188
Tenant Billing Module: Virtual Meters > View Data	189
Tenant Billing Module: Virtual Meters > Graph	191
Tenant Billing Module: Virtual Meters > Export	194
Tenant Billing Module: Tariffs	195
Tenant Billing Module: Tariffs > Add Simple Tier	196
Tenant Billing Module: Tariffs > Add TOD	198
Tenant Billing Module: Tariffs > Edit	201

Tenant Billing Module: Tariffs > Deactivate	202
Tenant Billing Module: Tariffs > Activating a Deactivated Tariff	203
Tenant Billing Module: Generate Bills	203
The Generate Bills screen	204
Reports	208
Tariffs	209
Owning multiple modules	209
Support	216
Modules Menu	217
Modules Menu > Purchasing Modules	217
Modules Menu > Purchasing Buildings	218
Wizards	219
Wizards > Add a Hub	219
Wizards > Share a Hub	222
Wizards > Remove a Hub	225
Wizards > Edit a Group	226
Wizards > Remove a Group	228
Wizards > Remove a device from a Hub	230
Wizards > Virtual Meters	231
Wizards > Buildings	232
Wizards > Building Portfolios	233
Wizards > Tenants	234
Wizards > Tariffs	235
Wizards > Executive Reporting Alerts	236
Wizards > Executive Reporting Contacts	236
Wizards > Executive Reporting Base Case	237
Wizards > Executive Reporting Building Goals	238
Wizards > Code Compliance Setup	239
Account Profile	240
Profile > License	240
Base Module > Profile > My Profile	241
Profile > My Profile > View	242

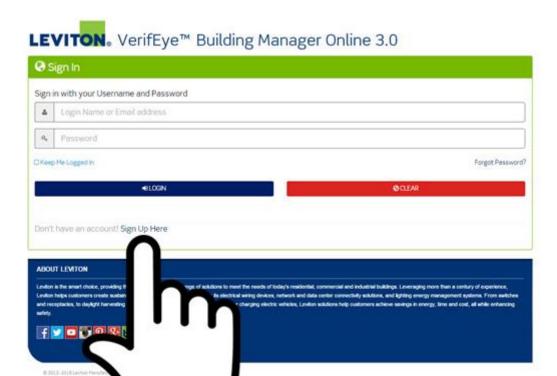
Profile > My Profile > Change Password	243
Profile > My Profile > Edit Profile	244
Profile > My Profile > Share Dashboard	245
Profile > My Profile > Share Dashboard > Add a User	246
Profile > My Profile > Share Dashboard > Remove a User	246
Profile > My Profile > Go to Contact Points	247
Profile > Log Out	248

Account Registration



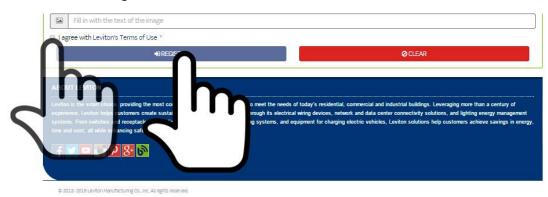


- 1. To begin using the base module, create an account with Leviton.
- 2. Open any web browser and type levitonbmo.com into the URL box and press enter. This will direct you to the Building Manager Online 3.0 login screen.
- 3. To create an account, click Sign Up Here. This will direct you to the User Registration page.



4. Enter all information in fields.

5. Read and agree to the terms of use and click REGISTER.



The registration confirmation screen is displayed.

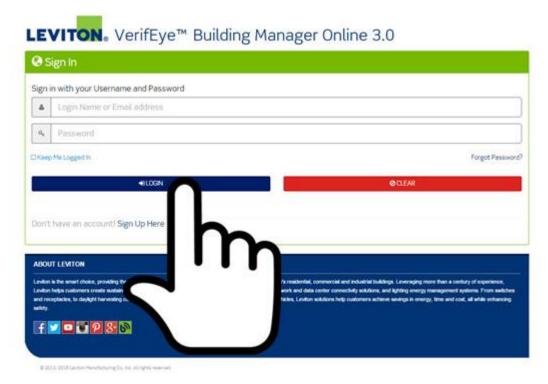


6. Click the link to return to the login screen.



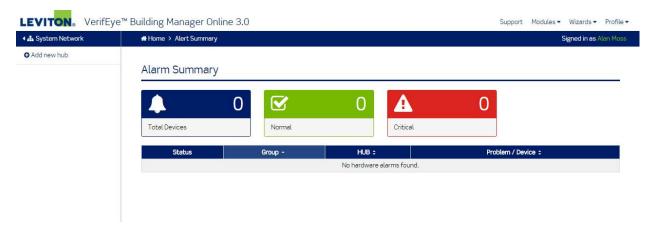
Account Login

1. Enter your username and password and then click LOGIN.



This is the home screen of the Building Manager Online 3.0. This is also known as the base module. The base module is available at no cost and allows you to:

- a. Create groups
- b. Add hubs/meters to Groups
- c. Export energy usage data
- d. Display energy usage graphs



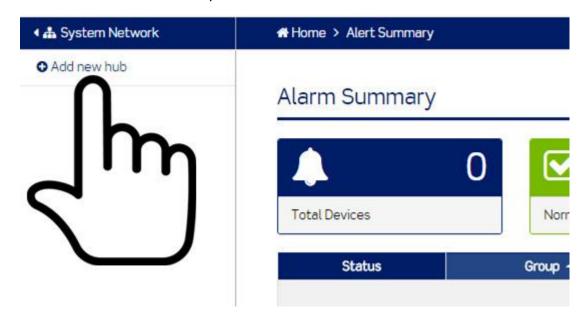
Base Modules

Base Module: Adding Meters

- 1. Click Wizards.
- 2. Click Add a HUB.

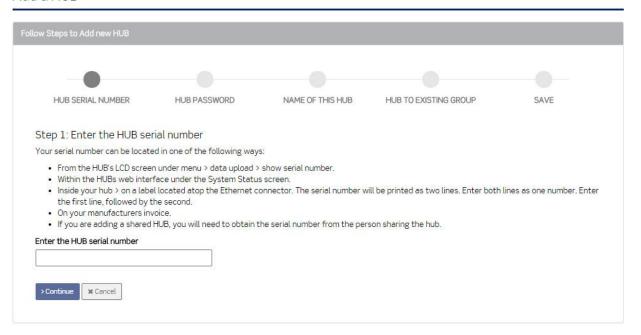


NOTE: You can also add the initial hub by clicking/pressing the Add new hub button located in the System Network.



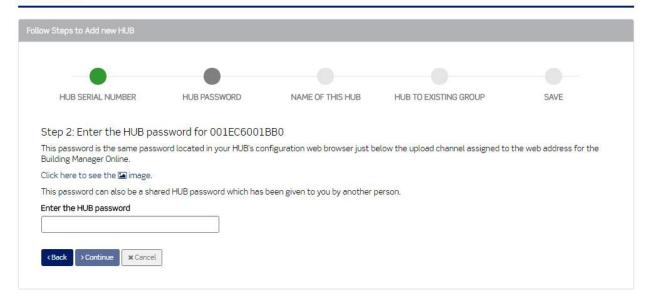
The Add a HUB wizard is displayed.

Add a HUB



- 3. Enter the HUB serial number.
 - The serial number for the Flex IO module or HD Pulse module is located on the sticker on the back of the device.
 - b. To access the serial number for an **embedded Hub or embedded HubLite**, press the menu button, select data upload, then select show serial number. The serial number will appear on the LCD screen.
 - c. To access the serial number for an EMH Hub, remove the lid. The serial number is located on the label on the Ethernet port.
 - d. To access the serial number for an EMH+, touch the about icon and scroll down. The serial number will be displayed on the LCD screen.
- 4. Click the Continue button.
- 5. Step 2: Enter the HUB password on the screen seen below.

Add a HUB



- 6. Enter the Hub password. The password is the same password located in your HUB's configuration web browser just below the upload channel assigned to the web address for the Building Manager Online 3.0.
 - a. Important: Set the channel password on your device prior to adding your device to the BMO.
 - b. If you do not know the hub password, contact the site manager for assistance to access the device.
- 7. Click the Continue button.
- 8. Step 3: Enter the name of this HUB screen on screen below.

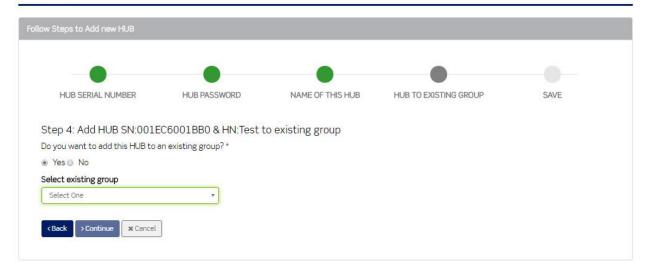
Add a HUB



- 9. Enter a unique name for the Hub.
- 10. Click the Continue button.
- 11. Click Yes to select an existing group.

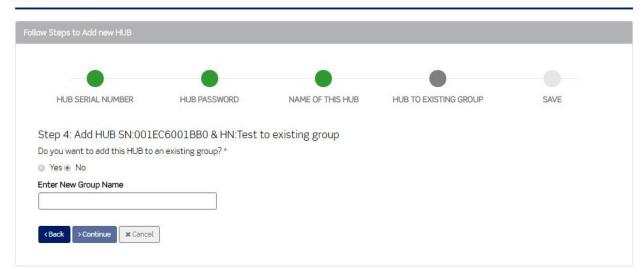
a. Note: The System Network must contain at least one group to select an existing group.

Add a HUB

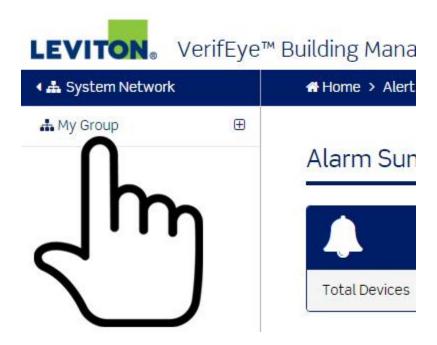


- 12. Click No to create a new group.
 - a. Enter a name for the group.

Add a HUB



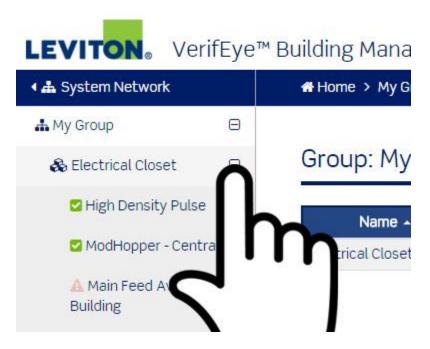
- 13. Click the Continue button.
- 14. Click the Save button.
 - a. The Hub will be displayed in the System Network under an existing group or a new group.



15. Click the plus sign next to the group to view the hub.



16. Click the plus sign next to the hub to view all meters connected to the hub.







- 1. The base module or home screen consists of the following:
 - 1. The System Network.
 - 2. The Alarm Summary.
 - 3. The main menu (Support, Modules, Wizards, Profile).

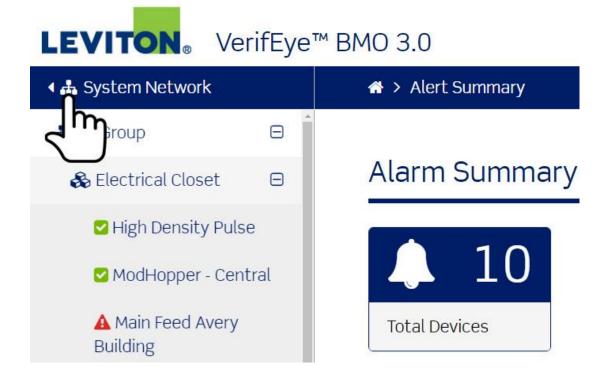
Base Module: Dashboard > System Network



- 1. The system network hierarchy consists of the following.
 - 1. Group: Groups contain hubs.
 - 2. Hub: Hubs contain devices.
 - 3. Device: Devices contain data points.

Note: The system network can be hidden and unhidden by clicking the system network icon.

(hide)



(unhide)



Base Module: Dashboard > Alarms

An alarm occurs when the BMO receives an error code from the hub. Device alarms are displayed on the home screen of the BMO.

Alarm Summary



The Alarm Summary displays:

- a. The total number of devices: This number represents all devices connected to all of the hubs connected to the BMO.
- b. The number of devices in a Normal state: This number represents no alarms.
- c. The number of devices in a Critical state: This number represents a device error.

Base Module: Groups

1. Click the name of any group located in the system network.



The group screen contains a table of hubs with two menu items.





Name -	Serial Number \$	Firmware \$	Last IP \$	Last Upload Time \$
Electrical Closet	001EC6001BB0	v02.15.1230b	10.6.17.8	Thursday March 17, 2016 13:31:20

Base Module: Groups > Status

The first menu item is Status. This is the default view for a group.



- The group status screen displays all hubs assigned to the selected group.
- The group status screen displays hub names, serial numbers, firmware versions, Last IP addresses and the Last Time each hub uploaded to the Building Manager Online 3.0.
- Clicking on a hub row allows you to drill into a hub to view all of the meters connected to the selected hub.

Group: My Group



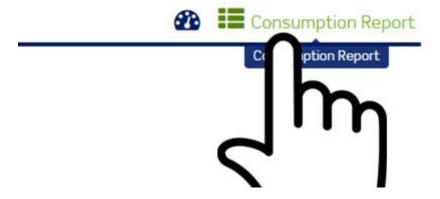


Base Module: Groups > Consumption Report



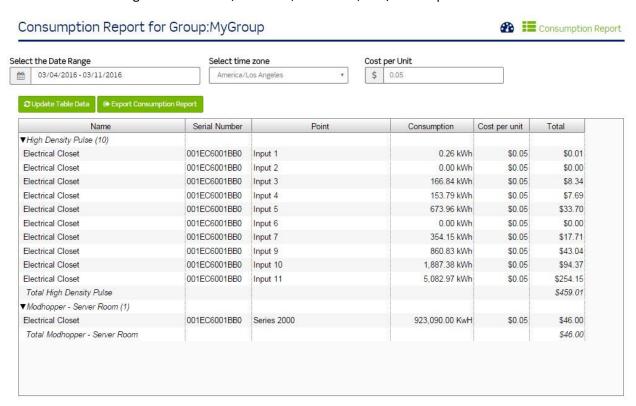
The second menu item is Consumption Report.

1. Click the consumption report menu item.

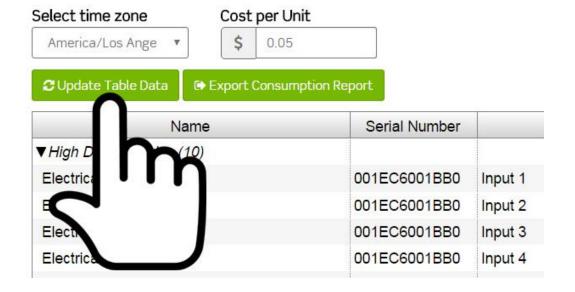


The Consumption Report screen is displayed.

- The consumption report screen displays consumption data for all hubs assigned to the selected
- The consumption report screen allows you to view consumption data based on a selected date range and time zone.
- You can change the start date, end date, time zone, and/or cost per unit.



2. Click the update table data button after all changes have been made.



3. You can export the consumption data by clicking/pressing the Export Consumption Report button.



Base Module: Hubs

- 1. Click the name of a group located in the System Network.
- 2. Click the name of a hub located below the group.



The hub screen is displayed.

HUB: Electrical Closet











HUB Serial Number: 001EC6001BB0

HUB Firmware Version: v02.15.1230b

Last Upload Connection: Friday Mar 18, 2016 12:01:21 from 10.6.17.8

Device -	Status ÷	Name & Purpose ÷	Type ¢	Firmware ¢
1	OK	High Density Pulse	Obvius, A8911-23, pulse counter, 23 channel	v1.07
2	OK	ModHopper - Central	Obvius, ModHopper, R9120-5	v2.06b
3	ALARM	Main Feed Avery Building	LEVITON,S3X00	8.2
5	OK	Modhopper - Server Room	Obvius, ModHopper, R9120-5	v2.06b
32	OK	Unconfigured	Obvius, ModHopper, R9120-5	v2.06b
64	ОК	Unconfigured	Obvius, ModHopper, R9120-5	v2.06b
128	ALARM	Unconfigured	Obvius, ModHopper, R9120-5	v2.06b
132	OK	TBD	Obvius, ModHopper, R9120-5	v2.06b
225	OK	Unconfigured	Obvius, ModHopper, R9120-5	v2.06b
250	OK	Internal I/O	Obvius, A8812, Internal I/O	v1.11

The hub screen contains a table of meters with six menu items.

Base Module: Groups > Hubs > Status

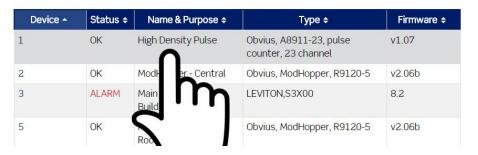
The first menu item is Status.



- This is the default view for a hub.
- The hub status screen displays all meters connected to the selected hub.
- The hub status screen displays serial numbers, firmware versions, and date/time of the last uploads to the BMO.
- Hub status information includes:
 - a. Meter device number
 - b. Meter status
 - c. Meter name & purpose
 - d. Meter type
 - e. The firmware version of the meter

1. Clicking a meter row allows you to navigate to a meter to view all of the data points and energy readings for the selected meter.





Base Module: Groups > Hubs > Alarm Notification

The second menu item is Alarm Notification.



1. Click the Alarm Notification menu item.



The alarm notification screen is displayed.

HUB: Electrical Closet

Alarm Notification 🌣 🎎 🔇 🗐







HUB Serial Number:

001EC6001BB0

HUB Firmware Version:

v02.15.1230b

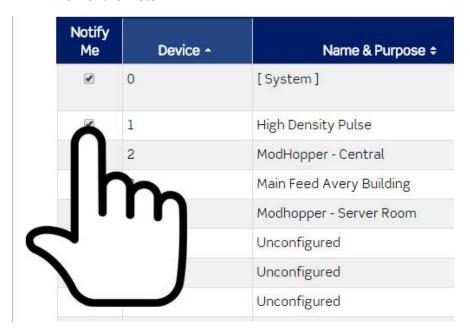
Last Upload Connection:

Thursday Mar 17, 2016 16:16:28 from 10.6.17.8

Notify Me	Device -	Name & Purpose ¢	Type ÷
8	0	[System]	HUB System Alarms, and no data uploads for 36 hours
8	1	High Density Pulse	Obvius, A8911-23, pulse counter, 23 channel
8	2	ModHopper - Central	Obvius, ModHopper, R9120-5
8	3	Main Feed Avery Building	LEVITON,S3X00
2	5	Modhopper - Server Room	Obvius, ModHopper, R9120-5
8	32	Unconfigured	Obvius, ModHopper, R9120-5
2	64	Unconfigured	Obvius, ModHopper, R9120-5
0	128	Unconfigured	Obvius, ModHopper, R9120-5
0	132	TBD	Obvius, ModHopper, R9120-5
	225	Unconfigured	Obvius, ModHopper, R9120-5
0	250	Internal I/O	Obvius, A8812, Internal I/O

- The alarm notification screen lists all meters connected to the hub.
- The alarm notification screen allows you to receive email notifications when a hub fails to communicate with the Building Manager Online 3.0 for more than 36 hours.
- The alarm notification screen also allows you to receive email notifications when a meter goes into an alarm status.

2. To begin receiving alarm notifications for a meter, click the Notify Me checkbox located in the row of the meter.



- 3. Click the Notify Me checkbox for any or all meters from which you would like to receive notifications.
- 4. When you are finished selecting meters, click the Save button.



Note: Alarm notifications will be sent to the email address registered with the Building Manager Online 3.0 account. You can view the email address by clicking/pressing Profile and then clicking/pressing My Profile.



The email address will be displayed on the screen.

E-Mail Address user1@leviton.com First Name User Last Name

Base Module: Groups > Hubs > Configuration

The third menu item is Configuration. Note: This menu option may or may not be visible. HUBS and devices added with shared passwords do not have access to the configuration screen.

Visible

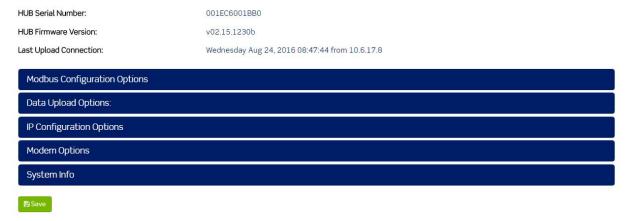
1



1. Click the Configuration menu item.



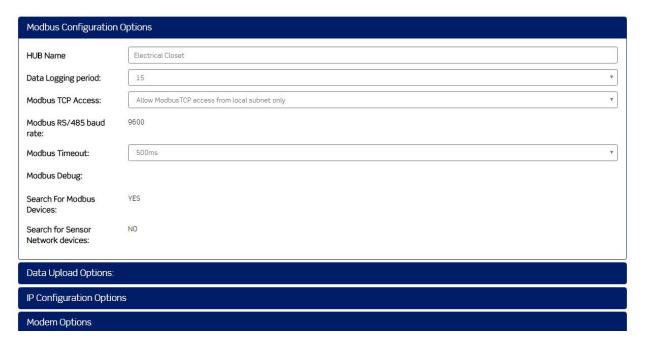
The HUB configuration screen is displayed.



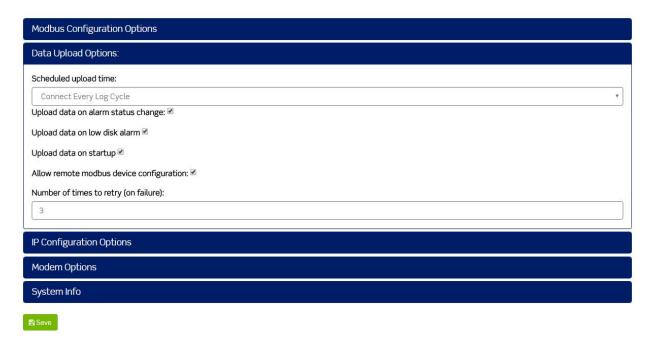
- 2. The HUB configuration screen displays the HUB Serial Number, HUB Firmware Version and Last Upload Connection.
- 3. The HUB configuration screen allows you to overwrite and/or view HUB settings.
- 4. Click configuration options to reveal HUB settings.



5. Configuration options.

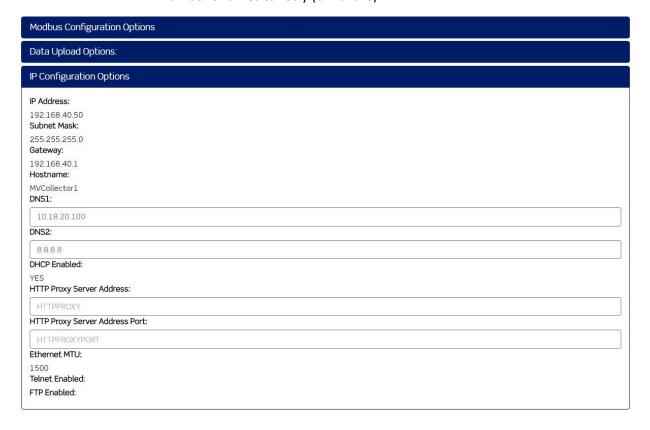


- a. Modbus Configuration Options.
 - i. HUB Name
 - ii. Data Logging period
 - iii. Modbus TCP Access
 - iv. Modbus RS/485 baud rate
 - v. Modbus Timeout
 - vi. Modbus Debug
 - vii. Search for Modbus Devices
 - viii. Search for Sensor Network Devices



b. Data Upload Options

- i. Scheduled upload time
- ii. Upload data on alarm status change
- iii. Upload data on low disk alarm
- iv. Upload data on startup
- v. Allow remote Modbus device configuration
- vi. Number of times to retry (on failure)



c. IP Configuration Options

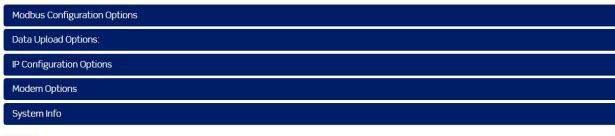
- i. IP Address
- ii. Subnet Mask
- iii. Gateway
- iv. Hostname
- v. DNS1
- vi. DNS2
- vii. DHCP Enabled
- viii. HTTP Proxy Server Address
- ix. HTTP Proxy Server Address Port
- x. Ethernet MTU
- xi. Telnet Enabled
- xii. FTP Enabled



Modbus Configuration Options
Data Upload Options:
IP Configuration Options
Modem Options
Modem: Dialout Enabled: NO Dialin Enabled: NO
System Info

- d. Modem Options
 - i. Modem
 - ii. Dialout Enabled
 - iii. Dialin Enabled

- e. System Info
 - i. Base Model
 - ii. Full Model
- 6. Simply navigate out of the HUB configuration screen without clicking the Save button to discard changes.
- 7. Click the Save button to apply changes. Important: Saved settings will overwrite settings saved in the HUB.





Base Module: Groups > Hubs > Upload Log

The fourth menu item is Upload Log.



1. Click the Upload Log menu item.



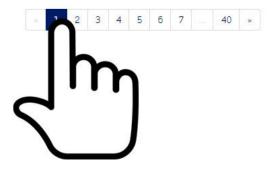
The upload log screen is displayed.

HUB Serial Number: 001EC6001BB0 **HUB Firmware Version:** v02.15.1230b

Last Upload Connection: Thursday Mar 17, 2016 16:16:28 from 10.6.17.8

Time ÷	IP Address	Message ÷
03/17/2 <mark>016</mark> 04:16 PM	10.6.17.8	Uploaded request mode CONFIGFILEMANIFEST for modbus device
03/17/2 <mark>016</mark> 04:16 PM	10.6.17.8	Uploaded data file contained 1 valid records, 0 duplicate records, and 0 rejected records for modbus device 250
03/17/2016 04:16 PM	10.6.17.8	Uploaded data file contained 1 valid records, 0 duplicate records, and 0 rejected records for modbus device 132

- The upload log screen displays records for all uploads made from the hub to the Building Manager Online 3.0.
- The upload log screen displays the time, IP address and the upload message for each upload made from the hub to the Building Manager Online 3.0.
- Scroll down to the bottom of the screen to change the number of records displayed per page and/or page through all log records.





Base Module: Groups > Hubs > Share Hub

The fifth menu item is Share HUB.

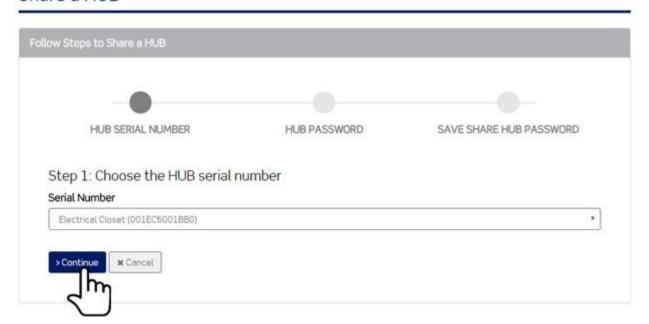


1. Click the Share HUB menu item.



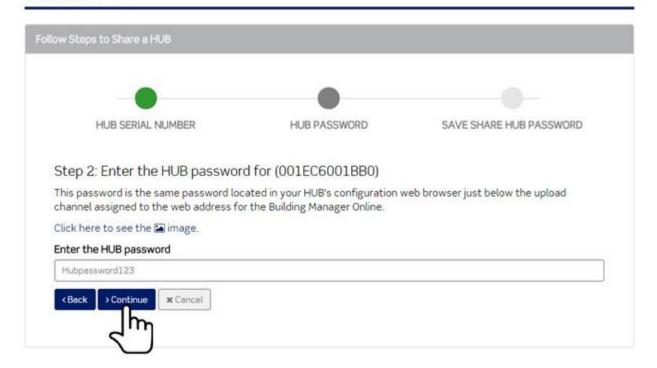
- The share a hub screen is displayed.
- The share a hub screen allows you to select a hub and then temporarily assign a password to the hub. You can then share the serial number and temporary password with another Building Manager Online 3.0 user.
- This allows you to share the hub and meter data with another user without granting full access to your hub.
- The user will not be able to edit the configuration settings of the shared hub.
- The BMO will only store one shared password per hub.
- When a shared password is changed, the shared user no longer has access to the shared hub.
- 2. Select the Serial Number for the hub you would like to share.
- 3. Click the Continue button.

Share a HUB



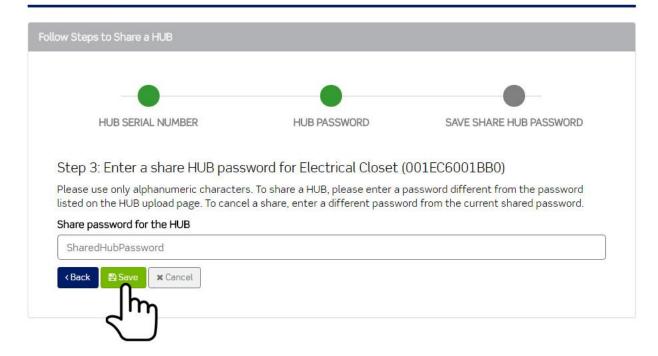
- 4. Enter the HUB password. This is the same password set in the upload page of the hub.
 - a. Important: Set the channel password on your device prior to adding your device to the Building Manager Online 3.0.
 - b. If you do not know the hub password, contact the site manager for assistance to access the device.
- 5. Click the Continue button.

Share a HUB



- 6. Enter the share password for the hub.
 - a. Note that this is a temporary password assigned to a hub that allows you to share the hub with another Building Manager Online 3.0 user.
 - b. If a share password is assigned to this hub at a later date, the data connection for the original share will be discontinued.
- 7. Click the Save button.

Share a HUB



Base Module: Groups > Hubs > Remove Hub

The sixth menu item is Remove HUB.

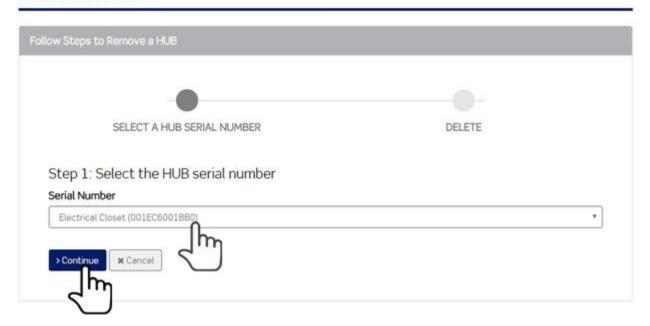


1. Click the Remove HUB menu item.



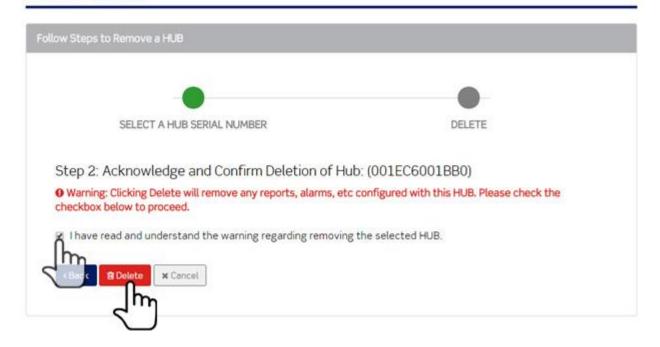
- 2. The remove hub screen is displayed. This option allows you to remove a hub from a group.
- 3. Step 1. Select the serial number for the hub you would like to remove.

Remove a HUB



- 4. Click the Continue button.
- 5. Acknowledge and Confirm Deletion of Hub.
- 6. Click the "I have read and understand..." checkbox.
- 7. Click the Delete button.

Remove a HUB



Base Module: Devices

- 1. Click the name of a group located in the system network.
- 2. Click the name of a hub located below the group.
- 3. Click the name of the device located below the hub.



The device screen contains a table of data points with seven menu items.

Device: High Density Pulse











Device Number: 1 on modbus/tcp gateway: 10.6.17.8

Device Type: Obvius, A8911-23, pulse counter, 23 channel

Status: OK

Date/Time of last upload: Friday March 18, 2016 11:46:58 Date/Time of last reading: Friday March 18, 2016 11:45:00

Function ¢	Current Reading ¢	Low Alarm ÷	High Alarm ¢
Input 1	91.5 kWh	0 kWh	0 kWh
Input 1 Demand	0 kW	0 kW	0 kW
Input 2	0 kWh	0 kWh	0 kWh
Input 2 Demand	0 kW	0 kW	0 kW

Base Module: Groups > Hubs > Devices > Status

The first menu item is Status. This is the default view for a device.



1. Click Status to display the Device Status Screen.

Device: High Density Pulse

Status III *

Device Number: 1 on modbus/tcp gateway: 10.6.17.8

Obvius, A8911-23, pulse counter, 23 channel Device Type:

Status: OK

Date/Time of last upload: Friday March 18, 2016 12:01:21 Date/Time of last reading: Friday March 18, 2016 12:00:00

Function ÷	Current Reading ÷	Low Alarm ÷	High Alarm +
Input 1	91.5 kWh	0 kWh	0 kWh
Input 1 Demand	0 kW	0 kW	0 kW
Input 2	0 kWh	0 kWh	0 kWh
Input 2 Demand	0 kW	0 kW	0 kW
Input 3	25,645.41 kWh	0 kWh	0 kWh
Input 3 Demand	1.28 kW	0 kW	0 kW
Input 4	20,481.28 kWh	0 kWh	0 kWh
Input 4 Demand	1.24 kW	0 kW	0 kW

- The device status screen displays all data points within a device.
- The device status screen displays the device name and number, the device type, the status of the device, the date/time of the last upload and the date/time of the last reading.
- The device status screen table displays the name of the data point, the current reading, the low and high alarms (if set).
- 2. Scroll down to the bottom of the screen to change the number of records displayed per page and/or page through all data points.



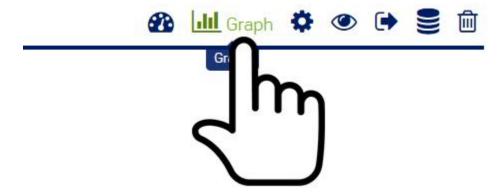


Base Module: Groups > Hubs > Devices > Graphs

The second menu item is Graph.



1. Click the Graph menu item.



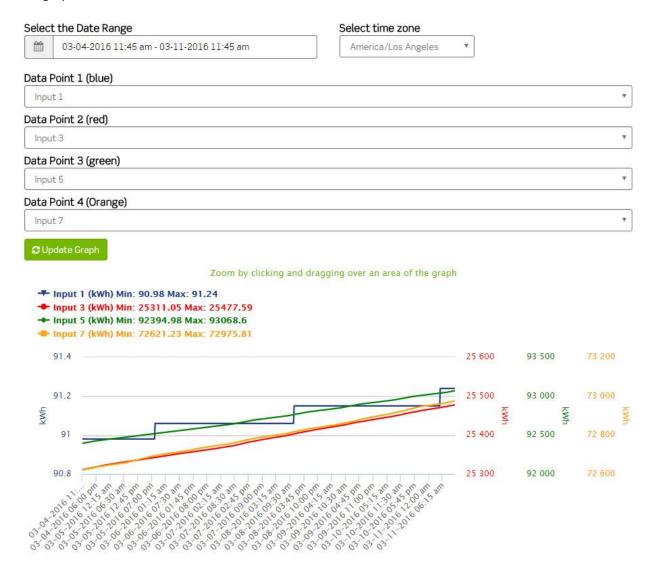
The device graph screen is displayed.



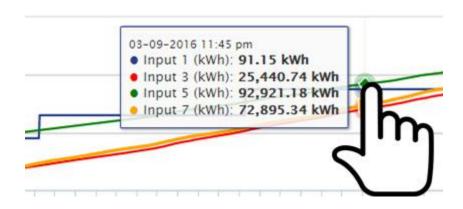
- The graph screen displays the device name and number, the device type, and the date range of the available data.
- The graph screen allows you to set a date range, select a time zone, and select up to four data points.
- 2. Select a range of data by clicking/pressing the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking/pressing the time zone dropdown.
- 7. Click the time zone.
- 8. Click the dropdown for Data Point 1 and select a data point.
- 9. Data points are color coded. Colors will display on graph.
- 10. Select up to four data points.
- 11. Click the Update Graph button.

C Update Graph

The graph is rendered.



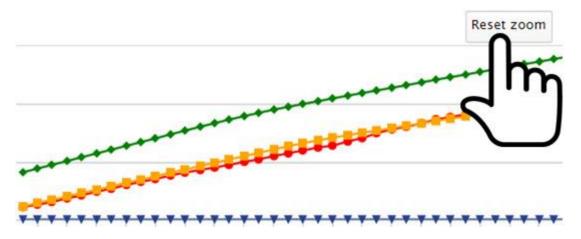
12. Hover over the data points to view detailed information for each input.



13. Hover over the graph and click and then drag and release to zoom in.



14. Press the reset button to reset the zoom on the graph to the original view.



15. Click the Update Graph button to render the graph whenever the date range, time zone, or data points are changed.



Base Module: Groups > Hubs > Devices > Configuration

The third menu item is Configuration. Note: This menu item may or may not be visible. HUBS and devices added with shared passwords do not have access to the configuration screen

Visible



Not Visible



1. Click the Configuration menu item.



The device configuration screen is displayed.

Device Number: 1 on modbus/tcp gateway: 10.6.17.8 Device Type: Obvius, A8911-23, pulse counter, 23 channel



- 2. The device configuration screen displays the device number and device type.
- 3. The device configuration screen allows you to overwrite data point names, units of measure, low alarms, high alarms and enable or disable the Console.
 - a. The console box, if checked will allow the alarm condition to be displayed on the HUB display screen until cleared.
- 4. Highlight and enter the information you would like to overwrite.



- 5. Simply navigate out of the device configuration screen without clicking the Save button to discard changes.
- 6. Click the Save button to apply changes.
- 7. Click the Save button to save updates. Important: Saved settings will overwrite settings saved in the device.

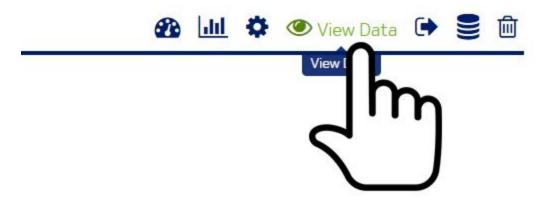


Base Module: Groups > Hubs > Devices > View Data

The fourth menu item is View Data.



1. Click the View Data menu item.



The view data screen is displayed.



- The view data screen displays the device name and number, the device type, and the date range of the available data.
- The view data screen displays a table containing all data and data points for the selected date range.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Select the time zone.
- 8. Click the Update Table Data button.

CUpdate Table Data

The data table will refresh based on the selections.

- 9. Scroll down to the bottom of the screen to page through data.
- 10. Click the Update Table Data button to populate the table with data whenever the date range or time zone is changed.



Base Module: Groups > Hubs > Devices > Export Data

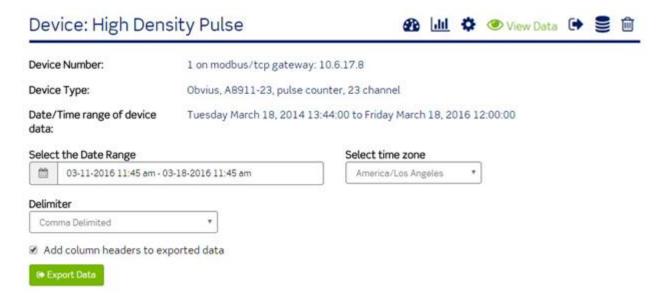
The fifth menu item is export data.



1. Click the Export Data menu item.



The export data screen is displayed.



- The export data screen displays the device name and number, the device type, the date/time range of the available data.
- The export data screen allows you to select a date range and time zone and then export the data to a text file.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. Select a Delimiter to determine whether the data should export as Comma Delimited or Tab Delimited.



- 9. Click the Add column headers checkbox to deselect or select whether column headers should be added to the exported text file.
- Add column headers to exported data



10. Click the Export Data button.



The text file will download.

11. If the text file does not appear to download, make sure your web browser popup blocker is not blocking the file.

Base Module: Groups > Hubs > Devices > Data Format

The sixth menu item is data format.



1. Click the Data Format menu item.



The data format screen is displayed.

Device: High Density Pulse











Device Number:

1 on modbus/tcp gateway: 10.6.17.8

Device Type:

Obvius, A8911-23, pulse counter, 23 channel

SQL Table Structure

Field	Туре	Null	Key	Default	Extra
time	datetime		PRI	0000-00-00 00:00:00	
error	int(11)	YES		0	
lowrange	int(11) unsigned	YES		0	
highrange	int(11) unsigned	YES		0	

The purpose of this screen is to provide you with the information necessary to recreate the database tables in another database. Use this option if you would like to export the device data and then import the data into your database.

- The data format screen displays the device name and number and the device type.
- The data format screen displays the field and data type for all data points.
- The data format screen displays the SQL statement for recreating the tables.

Base Module: Groups > Hubs > Devices > Remove Device

The seventh menu item is Remove Device.



1. Click the Remove Device button.



The remove device screen is displayed.

Device: High Density Pulse













Device Number:

1 on modbus/tcp gateway: 10.6.17.8

Device Type:

Obvius, A8911-23, pulse counter, 23 channel

Remove Device

 Warning: Clicking Remove Device will permanently remove the selected device from the hub accompanied by all historical data produced by the selected device. Please check the checkbox below to proceed.

I have read and understand the warning regarding removing the selected device and its historical data.

- Note: Making changes via the remove device screen does not disconnect the physical device from the physical hub.
- The remove device screen allows you to purge all data from the Building Manager Online 3.0 for a selected device. This will not physically remove the device from the hub. If the device has not been physically disconnected from the hub, the next time the hub communicates/uploads data to the Building Manager Online 3.0, the removed device will be refreshed with new/current data.
- 2. Click the "I have read and understand..." checkbox.
- 3. Click the Remove Device button.

Device: High Density Pulse











Device Number:

1 on modbus/tcp gateway: 10.6.17.8

Device Type:

Obvius, A8911-23, pulse counter, 23 channel

Remove Device

 Warning: Clicking Remove Device will permanently remove the selected device from the hub accompanied by all historical data produced by the selected device. Please check the checkbox below to proceed.

I have read and understand the warning regarding removing the selected device and its historical data.

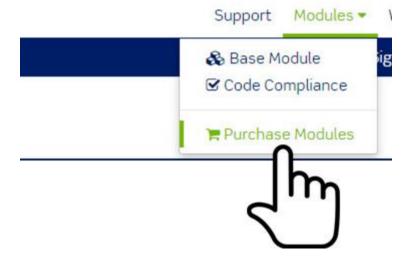


Code Compliance Module: Overview

This software module will allow you to meet the established and growing requirements of local municipal codes such as the Seattle Energy Code and CA Title 24 requirements along with those of developing versions of ASHRAE 90.1.



- The Code Compliance module is an expansion module that must be purchased.
- If you are interested in purchasing the Code Compliance module, see Modules Menu > Purchase Modules.

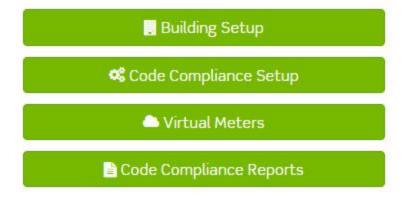


1. If the module has been purchased, click Modules > click Code Compliance.



The Code Compliance module is displayed. The Code Compliance module contains four menu items:

- **Building Setup**
- **Code Compliance Setup**
- Virtual Meters
- **Code Compliance Reports**



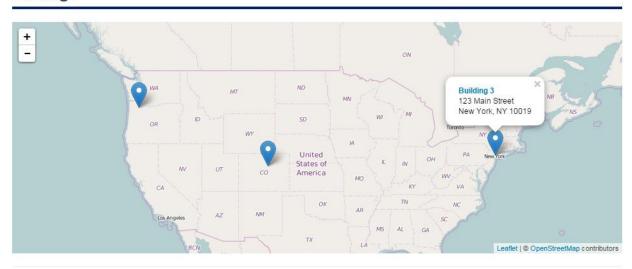
Code Compliance Module: Building Setup

1. Click the Building Setup button.



The Buildings list screen is displayed.

Buildings



	147:	724	Wy.	993	☐ Show Inactive
Name ¢	Address ¢	City ÷	State ÷	Zip Code ‡	Actions
Building 1	123 Main Street	Portland	OR	97201	♂ Edit
Building 2	123 Main Street	Denver	СО	80123	♂ Edit
Building 3	123 Main Street	New York	NY	10019	⊘ Edit

- The Buildings list screen displays a map pinpointing the location for each building added to the Building Manager Online 3.0.
- The Building list screen contains a table listing all buildings added to the Building Manager Online 3.0.

Name ¢	Address ¢	City ¢	State ¢	Zip Code ‡	Actions
Building 1	123 Main Street	Portland	OR	97201	♂ Edit
Building 2	123 Main Street	Denver	со	80123	♂ Edit
Building 3	123 Main Street	New York	NY	10019	

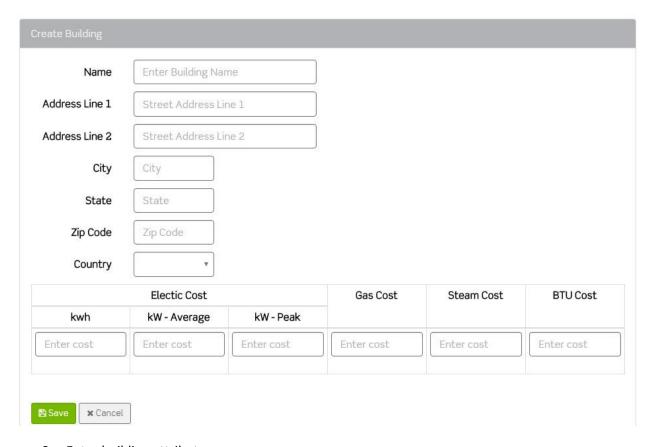
Code Compliance Module: Building Setup > Add New Building

1. Click the Add New Building button.



The Building Setup screen is displayed.

Add Building



- 2. Enter building attributes.
 - a. Name of the Building
 - b. Address Line 1
 - c. Address Line 2 (optional)
 - d. City
 - e. State
 - f. Zip Code

 - h. Fields such as Square footage may be displayed if other modules are purchased.
- 3. Enter each utility cost.
 - a. Electric
 - i. Kwh
 - ii. kW Average
 - iii. kW Peak
 - b. Gas Cost
 - c. Steam Cost

d. BTU Cost

- The utility cost information will be used in calculations when generating the code compliance
- Note: The utility cost information must be entered or the Code Compliance reports will not provide the desired results.
- 4. Click the Cancel button to discard changes OR
- 5. Click the Save button to add the building to the Buildings list screen.

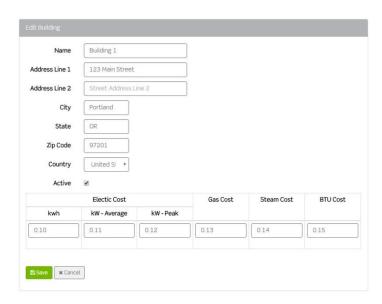
Code Compliance Module: Building Setup > Edit Building

1. Click the Edit link in the row of the building located in the Actions column on the Buildings list screen or simply click the name of the building.

Name ¢	Address ¢	City \$	State \$	Zip Code *	Actions
Building 1	123 Main Street	Portland	OR	97201	€ Edit
Building	123 Main Street	Denver	СО	80123	©

The Building Edit screen is displayed.

Building: Building 1



- 2. Click the field to be modified.
- 3. Enter changes.
- 4. Click the Cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

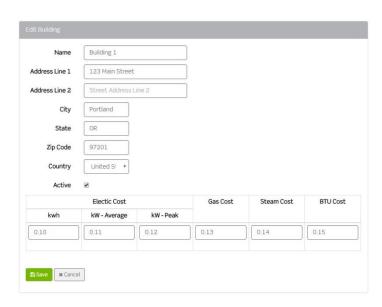
Code Compliance Module: Building Setup > Remove Building

1. Click the Edit link in the row of the building located in the Actions column on the Buildings list screen or simply click the name of the building.

Name ¢	Address ¢	City \$	State \$	Zip Code *	Actions
Building 1	123 Main Street	Portland	OR	97201	€ Edit
Building	123 Main Street	Denver	СО	80123	™ m

2. The Building Edit screen is displayed.

Building: Building 1



3. Click the Active checkbox to remove the building from the Buildings list screen.

Active



- 4. When the checkbox is empty (doesn't contain a check) and the screen has been saved, the building will no longer appear in the Buildings list screen and you will not be able to access the building from other areas of the Building Manager Online 3.0.
- 5. Click the Cancel button or simply navigate out of the screen without clicking the Save button to discard changes.
- 6. Click the Save button to remove the building.

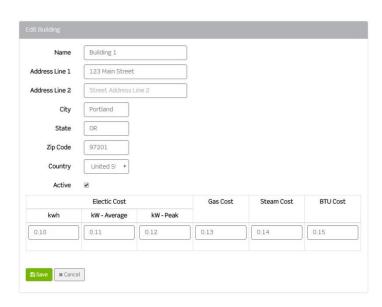
Code Compliance Module: Building Setup > Adding a Removed Building

1. Click the Edit link in the row of the building located in the Actions column on the Buildings list screen or simply click the name of the building.

Name ¢	Address ¢	City \$	State \$	Zip Code \$	Actions
Building 1	123 Main Street	Portland	OR	97201	' Edit
Bring	123 Main Street	Denver	СО	80123	™ m

2. The Building Edit screen is displayed.

Building: Building 1



3. Click the Active checkbox to add the building back to the Buildings list screen.

Active



- 4. Click the Cancel button or simply navigate out of the screen without clicking the Save button to discard changes.
- 5. Click the Save button to add the building.

Code Compliance Module: Code Compliance Setup

1. Click the Code Compliance Setup button.



The Code Compliance Module Setup screen is displayed.

Code Compliance Module Setup

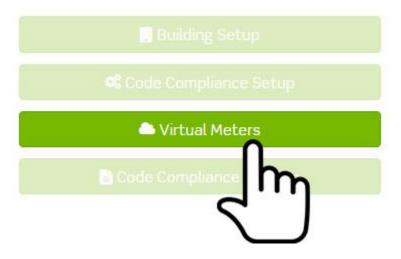
Please select the HUB and building to be used for Code Compliance. Only one HUB, and one building, can be used with this ▲ Choosing another HUB will require all the reports to be reconfigured. Select Group test Select Hub Electrical Closet Select Building × Cancel

- 2. Select Group.
 - a. Groups are located in the System Network and added, edited, and removed through the base module.
- 3. Select Hub.
 - a. Hubs are child objects to groups.
 - b. Hubs are located below groups in the System Network and added, edited, and removed through the base module.
 - c. Note: Available hub selections are based on the prior group selection.
- 4. Select Building.
 - a. Available buildings are active buildings located in the Buildings list screen.
 - b. Selecting a building creates a relationship between the building and the hub to be used in Code Compliance reporting.
- 5. Click the Cancel button or simply navigate out of the screen without clicking/pressing the Save button to discard changes.
- 6. Click the Save button to save changes.

Code Compliance Module: Virtual Meters

Virtual meters allow you to add or subtract real data points to produce virtual data points. You can only create virtual meters from real data points of the same type such as kW, Degree F, etc. Only hubs with a data upload interval of 15 minutes can be used to create Virtual meters.

1. Click the Virtual Meters button.



The Virtual Meters list screen is displayed.



- The Virtual Meters list screen contains a table listing all virtual meters added to the Building Manager Online 3.0.
- The Virtual Meters list screen contains a table and two main navigational menu items.
- The table lists all Virtual Meters added to the Building Manager Online 3.0.
- The two navigational menu items are Add New Virtual Meter and Home.
- The Virtual Meters list screen allows you to filter your virtual meters by Building.



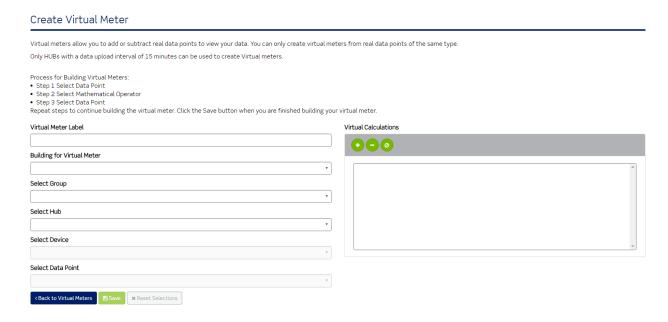
2. Click the Home button to return to the home screen of the Building Manager Online 3.0.

Code Compliance Module: Virtual Meters > Add

1. Click the Add New Virtual Meter button.

Add New Virtual Meter

The Create Virtual Meter screen is displayed.

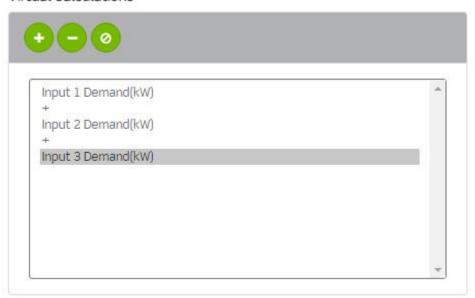


- 2. Enter Virtual Meter Label.
 - a. This will be the name of the Virtual Meter.
- Select Building.
 - a. The purpose of this selection is help you keep track of your virtual meters by allowing you to see which building is associated with each virtual meter.
- 4. Select Group.
 - a. Groups are located in the System Network and added, edited, and removed through the base module.
- 5. Select Hub.
 - a. Hubs are child objects to groups.
 - b. Hubs are located below groups in the System Network and added, edited, and removed through the base module.
 - c. Note: Available hub selections are based on the prior group selection.
- 6. Select Device.
 - a. Devices are child objects to hubs.
 - b. Devices are located below hubs in the System Network.
 - c. As long as a device is physically connected to a hub and the hub is uploading data to the Building Manager Online 3.0, the Building Manager Online 3.0 will receive data from the hub for the device.
- 7. Select Data Point.
 - a. Data Points are child objects to devices which are child objects to hubs.
 - b. Data Points are located in the System Network under Group > Hubs > Devices. Each device contains data points.

c. Note: Available data point selections are based on the prior hub selection.

The selected data point will display in the Virtual Calculations box.

Virtual Calculations



The selected data point will also display below the Virtual Data Point Definition heading.

Virtual Data Point Definition

Input 1 Demand(kW) • Input 2 Demand(kW) • Input 3 Demand(kW)

Note: A virtual meter formula/equation is known as a virtual meter definition.

- 8. Click the appropriate mathematical operator.
 - a. Plus sign (+)

Active 🗹

i. The plus sign (+) will add the selected data point value to the next data point value.

Virtual Calculations



b. Subtraction sign (-)

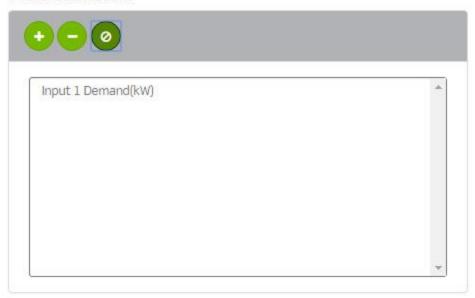
i. The subtraction sign (-) will subtract the next data point value from the selected data point value.

Virtual Calculations



- c. Clear button (Ø).
 - i. Click the clear button to remove elements from a Virtual Calculations definition.
 - ii. Note: The clear button will only remove a data point or operator at the end of a definition/equation.
 - iii. Click the last data point or operator in the definition/equation.
 - iv. Click the clear button.

Virtual Calculations



9. Click the data point dropdown and click the next data point. Note: The data point dropdown field is used for selecting the initial data point and each additional data point.



- 10. Repeat adding data points and mathematical operators until the definition is complete.
 - a. Process for Building Virtual Meters:
 - i. Step 1 Select Data Point
 - ii. Step 2 Select Mathematical Operator
 - iii. Step 3 Select Data Point

- 11. Note: Virtual Meters must be of the same type (e.g., kW, Degree F, etc.).
- 12. Like data points can be added and subtracted from different hubs, groups, and other virtual meters.
 - a. Process for Building Virtual Meters using multiple groups or hubs:
 - i. Step 1 Select Data Point
 - ii. Step 2 Select Mathematical Operator
 - iii. Step 3 Select Group
 - iv. Step 4 Select Hub
 - v. Step 5 Select Data Point
- 13. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 14. Click the Reset Selections button to clear the screen and start over OR
- 15. Click the Save button to save the virtual meter. The Virtual Meters list screen is displayed and the newly created virtual meter is listed.

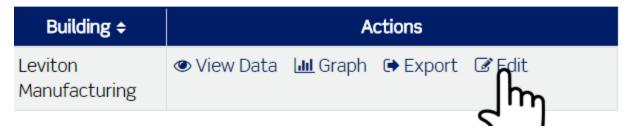
Virtual Meters



Code Compliance Module: Virtual Meters > Edit

1. Click the Edit link in the row of the virtual meter located in the Actions column on the Virtual Meters list screen or simply click the name of the virtual meter.





The virtual meter edit screen is displayed.

Edit Virtual Meter Virtual meters allow you to add or subtract real data points to view your data. You can only create virtual meters from real data points of the same type Only HUBs with a data upload interval of 15 minutes can be used to create Virtual meters. Process for Building Virtual Meters: • Step 1 Select Data Point Step 2 Select Mathematical Operator Step 3 Select Data Point Repeat steps to continue building the virtual meter. Click the Save button when you are finished building your virtual meter Virtual Meter Label Virtual Calculations Virtual Meter Number 1 **Building for Virtual Meter** Leviton Manufacturing 20497 SW Teton Avenue, Tualatin OR Hvac Loads Demand(kW) 001EC6001BB0-1 . Phase A Real Power(kW) 001EC6001BB0-3 Select Group Phase C Real Power(kW) 001EC6001BB0-3 Select Hub Select Device Select Data Point Virtual Data Point Definition Hvac Loads Demand(kW) 001EC6001BB0-1 ♥ Phase A Real Power(kW) 001EC6001BB0-3 ♥ Phase C Real Power(kW) 001EC6001BB0-3 Active 🗷

- 2. From this screen, you can:
 - a. Change the label (name) of the meter.
 - b. Select a Building for the Virtual Meter.
 - c. Select additional Groups.
 - d. Select additional hubs (must first select the group).
 - e. Select additional data points (must first select the hub).
 - f. Add and remove data points and operators to and from the Virtual Data Point Definition.
- 3. Make the necessary edits on the page.
- 4. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking/pressing the Save button to discard changes OR
- 5. Click the Reset Selections button to clear the screen and start over OR
- 6. Click the Save button to save changes.

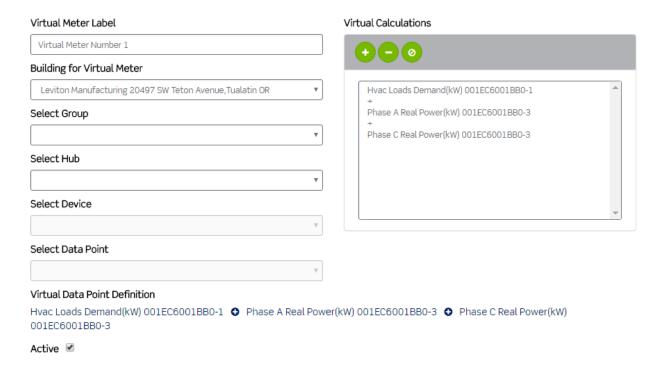
Code Compliance Module: Virtual Meters > Remove

1. Click the Edit link in the row of the virtual meter located in the Actions column on the Virtual Meters list screen or simply click the name of the virtual meter.

Show Inactive



The virtual meter edit screen is displayed.



2. Click the Active checkbox to remove the virtual meter from the virtual meter list screen.

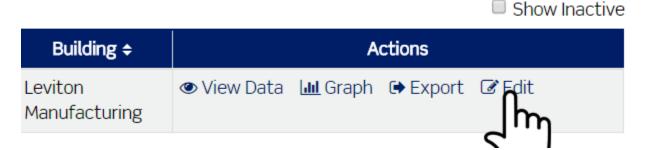




- 3. When the checkbox is empty (doesn't contain a check) and the screen has been saved, the virtual meter will no longer appear in the virtual meter list screen and you will not be able to access the virtual meter from other areas of the Building Manager Online 3.0.
- 4. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save the change.

Code Compliance Module: Virtual Meters > Adding a Removed Virtual Meter

1. To add a removed virtual meter, click the Edit link in the row of the virtual meter located in the Actions column on the virtual meter list screen or simply click the name of the virtual meter.

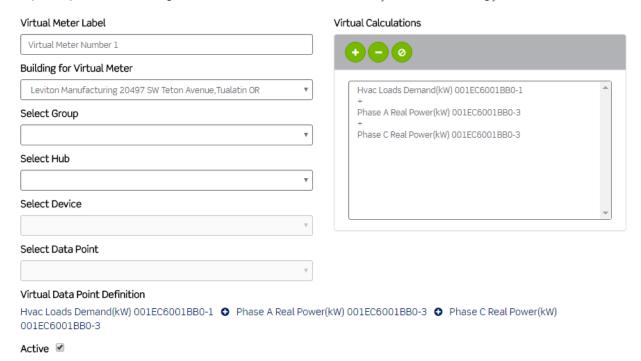


The virtual meter edit screen is displayed.

Process for Building Virtual Meters:

- · Step 1 Select Data Point
- · Step 2 Select Mathematical Operator
- · Step 3 Select Data Point

Repeat steps to continue building the virtual meter. Click the Save button when you are finished building your virtual meter.



2. Click the Active checkbox to add the virtual meter back to the virtual meters list screen.

Active



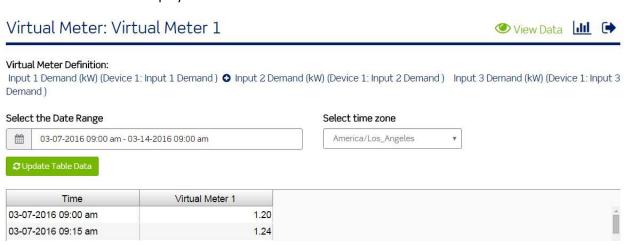
- 3. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking/pressing the Save button to discard changes OR
- 4. Click the Save button to activate the virtual meter.

Code Compliance Module: Virtual Meters > View Data

1. Click the View Data link in the Actions column of the virtual meter list screen.



The view data screen is displayed.



- The view data screen displays the name of the virtual meter, the definition (equation) used to calculate the virtual data points.
- The view data screen displays three menu items:



- The first menu item is View Data. The View Data link is also located on the virtual meters list screen under the Actions column. This is the default view for a virtual meter.
- The view data screen displays a table containing all data and virtual data points for the selected date range.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. Click the Update Table Data button.



The data table will refresh based on the selections.

9. Scroll down to the bottom of the screen to page through data.

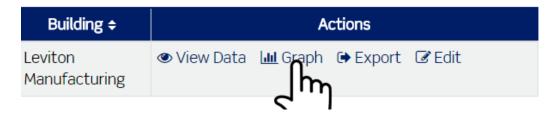


10. Click the Update Table Data button to populate the table whenever the date range or time zone is changed.



Code Compliance Module: Virtual Meters > Graph

1. Click the Graph link in the virtual meters list screen under the Actions column.



Graph is the second menu item.



2. The graph screen displays the name of the virtual meter and the definition (equation) used to calculate the virtual data points.

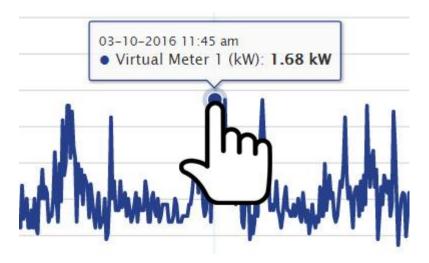
Virtual Meter Graph: Virtual Meter 1 Virtual Meter Definition: Input 1 Demand (kW) (Device 1: Input 1 Demand) Input 2 Demand (kW) (Device 1: Input 2 Demand) Input 3 Demand (kW) (Device 1: Input 3 Demand) Select the Date Range Pick Time Zone 03-07-2016 09:00 am - 03-14-2016 09:00 am America/Los Angeles Zoom by clicking and dragging over an area of the graph Virtual Meter 1 (kW) Min: 0.64 Max: 2.2 2.25 1.75 × 1.25 0.75

- A graph is rendered based on the default date range.
- The graph screen allows you to set a date range and select a time zone.
- 3. Select a range of data by clicking the date range picker.
- 4. Select a start date.
- 5. Select an end date.
- 6. Click the Apply button.
- 7. Select the time zone by clicking/pressing the time zone dropdown.
- 8. Click the time zone.
- 9. Click the Update Graph button.



The graph is rendered.

10. Hover over the data points to view detailed information for each input.



11. Hover over the graph and click and then drag and release to zoom in.



12. Press the Reset zoom button to reset the zoom on the graph.



13. Click the Update Graph button to render the graph whenever the date range or time zones are changed.



Code Compliance Module: Virtual Meters > Export

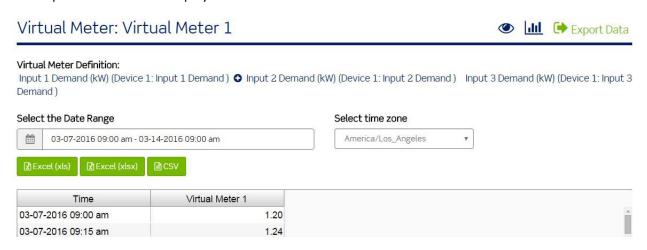
1. Click the Export Data menu item located in the virtual meters list screen under the Actions column.



Export Data is the third menu item.

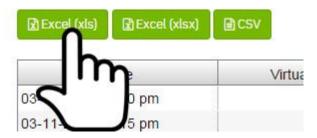


The Export Data screen is displayed.



- The export data screen displays the name of the virtual meter and the definition (equation) used to produce data.
- The export data screen allows you to select a date range and time zone and then export the data to a text file.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.

- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. Click the Excel (xls) button to export the data in an xls file format.



- 9. Click the Excel (xlsx) button to export the data in an xlsx file format.
- 10. Click the CSV button to export the data in a comma separated values file format. The file will download. Note: If the file does not appear to download, make sure the popup blocker in your web browser is not blocking the file.

Code Compliance Module: Code Compliance Reports

1. Click the Code Compliance Reports button.



The Code Compliance Reports screen is displayed.

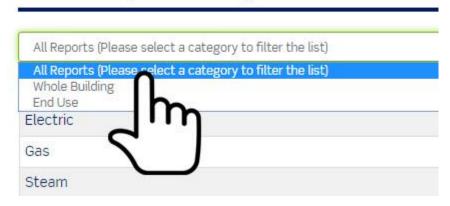
Code Compliance Reports



♣ Home

- The Code Compliance Reports screen displays a table containing a list of all available reports.
- The Code Compliance Reports screen contains links under the Actions column to View Data,
 Graph, Export data, and the Configuration screen for each report.
- The Code Compliance Reports screen allows you to filter reports by end use, whole building, or all reports. The default selection displays all reports.

Code Compliance Reports



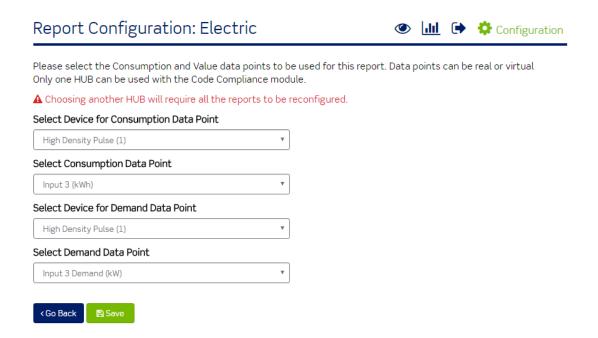
Code Compliance Module: Code Compliance Reports > Configuration

1. Click the Configuration link in the Actions column for the report you would like to configure.



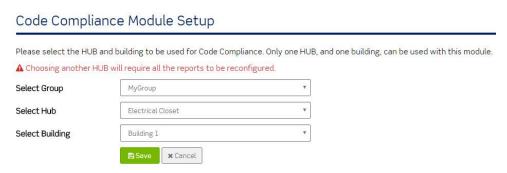
If the report has not been configured, clicking the name of the report will also return the report configuration screen.

The report configuration screen is displayed.



Note: Each report must be configured prior to use.

a. The Code Compliance Module Setup screen must be configured prior to configuring reports through the reports configuration screen (Code Compliance > Code Compliance Module Setup).



b. The selected building must have all utility costs defined in the building setup screen prior to configuring reports (Code Compliance > Building Setup > Edit).



- 2. Select the Device for Consumption Data Point.
- 3. Select the Consumption Data Point.
- 4. Select the Device for Demand Data Point.
- 5. Select the Demand Data Point.
- 6. Click the Go Back button to discard changes and return to the Code Compliance Reports screen
- 7. Click the Save button to complete the configuration process.
- 8. Repeat the configuration process for all Code Compliance Reports.

Code Compliance Module: Code Compliance Reports > View Data

1. Click the View Data link in the Actions column for the report you would like to configure.



The view data screen is displayed.





Date/Time range of Consumption data:

Tuesday March 18, 2014 13:44:00 to Monday March 14, 2016 11:45:00

Date/Time range of Demand data:

Tuesday March 18, 2014 13:44:00 to Monday March 14, 2016 11:45:00

Select the Date Range

Pick Time Zone



03-07-2016 10:45 am - 03-14-2016 11:00 am

America/Los Angeles

CUpdate Report

Consumption	Demand (Average)	Demand (Peak)
	Please wait	

<Go Back to Reports

- The view data screen is the default screen when a configured report is clicked. Note: If the report has not been configured, clicking the view data link will return the report configuration
- The view data screen displays the name of the report, the date/time range of the consumption data and the date/time range of the demand data.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. Click the Update Report button.



The table will display the value and cost for the consumption, demand (average), and demand (peak) for the selected date range.

Code Compliance Module: Code Compliance Reports > Graph

1. Located in the row of the report name, click the Graph link in the Actions column.



a. If the report has not been configured, clicking/pressing the Graph link will return the report configuration screen.

The graph screen displays the name of the report and the date/time range for the available data.

Report: Electric Tuesday March 18, 2014 13:44:00 to Monday March 14, 2016 11:45:00 Date/Time range of Consumption data: Date/Time range of Tuesday March 18, 2014 13:44:00 to Monday March 14, 2016 11:45:00 Demand data: Select the Date Range Pick Time Zone Data Rollup America/Los Angeles 03-07-2015 11:45 am - 03-10-2016 11:45 am Day C Update Graph Zoom by clicking and dragging over an area of the graph Consumption: Series 2000 (KwH) Min: 118120 Max: 367610 → Demand: Series 2000 Demand (kW) Min: 4571 Max: 6113 600k 10k 500k 400k 300k 4k 200k 2k

- A default date range is selected and a default graph is rendered.
- The graph screen allows you to set a date range, select a time zone, and select data rollup.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.

100k

- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. Select a data rollup period by clicking/pressing the data rollup dropdown.
- 9. Click the period.
- 10. Click the Update Graph button.



The graph is rendered.

11. Hover over the data points to view detailed information for each input.



12. Hover over the graph and click and then drag and release to zoom in.



13. Press the Reset zoom button to reset the zoom on the graph.



14. Click the Update Graph button to render the graph whenever the date range or time zones are changed.



Code Compliance Module: Code Compliance Reports > Export

- 1. Located in the row of the report name, click the Export link in the Actions column.
 - a. If the report has not been configured, clicking the Export link will return the report configuration screen.



The export data screen displays the name of the report and the date/time range of the available report data.



The export data screen allows you to select a date range and time zone and then export the data to a text file.

- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. Click the Update Report button.

C Update Report

- 9. The data table is refreshed and displays the value and cost of consumption, demand (average), and demand (peak) data.
- 10. Click the Excel (xls) button to export the data in an xls file format.



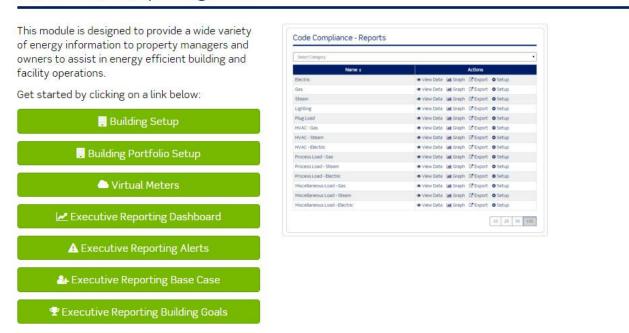
- 11. Click the Excel (xlsx) button to export the data in an xlsx file format OR
- 12. Click the CSV button to export the data in a comma separated values file format OR
- 13. Click the PDF button to export the data in a PDF file format.

The file will download. Note: If the file does not appear to download, make sure the popup blocker in your web browser is not blocking the file.

Executive Reporting Module: Overview

The Executive Reporting module allows executive stakeholders to readily access and understand energy usage and cost data specific to their facilities and portfolios.

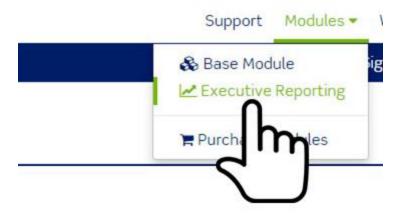
✓ Executive Reporting Module



- The Executive Reporting module is an expansion module that must be purchased.
- If you are interested in purchasing the Executive Reporting module, see Modules Menu > Purchase Modules.

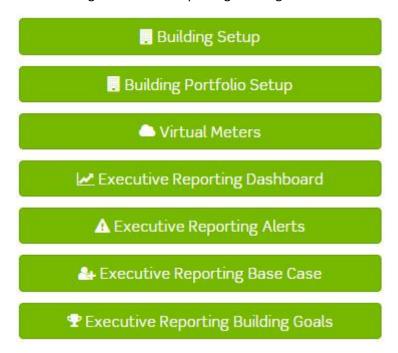


1. If the module has been purchased, click Modules > click Executive Reporting.



The Executive Reporting module is displayed. The Executive Reporting module contains seven menu items:

- a. Building Setup
- b. Building Portfolio Setup
- c. Virtual Meters
- d. Executive Reporting Dashboard
- e. Executive Reporting Alerts
- f. Executive Reporting Base Case
- g. Executive Reporting Building Goals



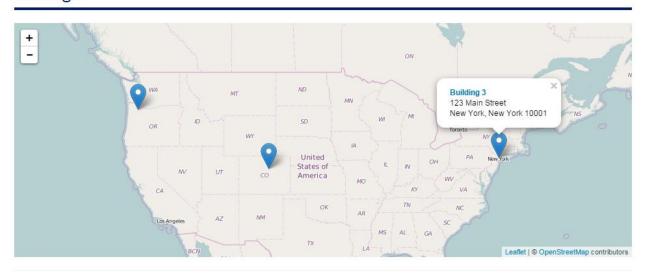
Executive Reporting Module: Building Setup

1. Click the Building Setup button.



2. The Buildings list screen is displayed.

Buildings



Your module license(s) allows for a total of 10 buildings. Currently, there are a total of 7 active and inactive buildings.

Show Inactive

Name ¢	Address ¢	City ¢	State ÷	Zip Code ‡	Actions
Building 1	123 Main Street	Portland	Oregon	97201	☑ Edit 🚳 Dashboard
Building 2	123 Main Street	Denver	Colorado	80123	☑ Edit 🚳 Dashboard
Building 3	123 Main Street	New York	New York	10001	☑ Edit 🍇 Dashboard

+ Add New Building

The Buildings list screen displays a map pinpointing the location for each building added to the Building Manager Online 3.0 and contains a table listing all buildings added to the Building Manager Online 3.0.

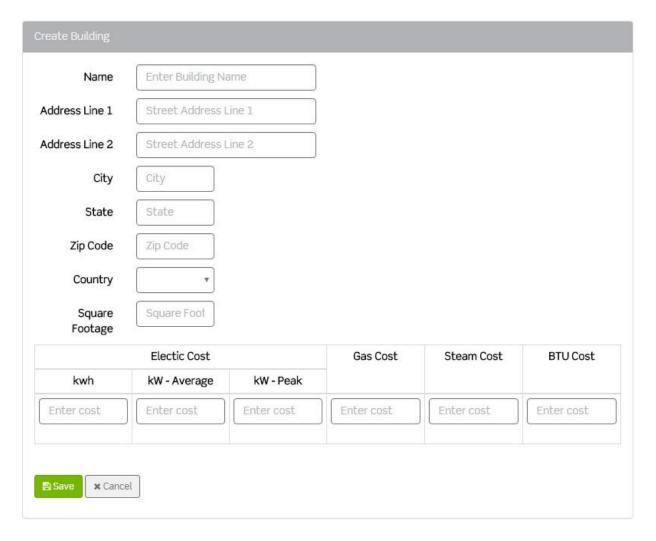
Executive Reporting: Building Setup > Add New Building

1. Click the Add New Building button.



The Building Setup screen is displayed.

Add Building



- 2. Enter building attributes.
 - a. Name of the Building

- b. Address Line 1
- c. Address Line 2 (optional)
- d. City
- e. State
- f. Zip Code
- g. Country
- h. Square Footage
- 3. Enter each utility cost.
 - a. Electric
 - i. Kwh
 - ii. kW Average
 - iii. kW Peak
 - b. Gas Cost
 - c. Steam Cost
 - d. BTU Cost
- 4. Click the Cancel button to discard changes OR
- 5. Click the Save button to add the building to the buildings list screen.

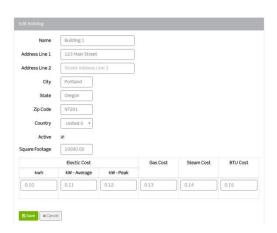
Executive Reporting: Building Setup > Edit Building

1. Click the Edit link in the row of the building located in the Actions column on the Buildings list screen or simply click the name of the building.

Name ¢	Address ¢	City \$	State \$	Zip Code [‡]	
Building 1	123 Main Street	Portland	OR	97201	 Edit
Building	123 Main Street	Denver	СО	80123	€ m

The Edit building screen is displayed.





2. Click the field to be modified.

- 3. Enter changes.
- 4. Click the cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

Executive Reporting: Building Setup > Dashboard

1. Click the Dashboard link in the row of the building located in the Actions column on the Buildings list screen.

Name ¢	Address ¢	City ¢	State ÷	Zip Code ‡	Actions
Building 1	123 Main Street	Portland	Oregon	97201	☑ Edit 🚳 Dashboard
Building 2	123 Main Street	Denver	Colorado	80123	☑ Edit 🚳 Da 🙀
Building 3	123 Main Street	New York	New York	10001	☑ Edit 🚜

The Building Dashboard screen displays the building name, the current weather condition for the location of the building, a map displaying the location of the building, and a list of reports.



The Building Dashboard will display goal gauges when building goals are added.

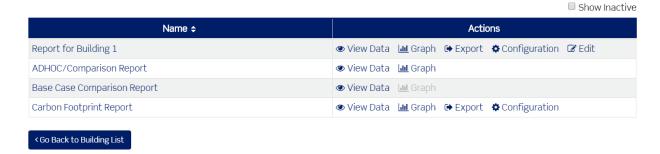


The building dashboard screen contains three menu options:



- Edit Building. This is a shortcut to the Executive Reporting > Building Setup > Edit screen.
- Base Case. This is a shortcut to the Executive Reporting > Base Cases screen.
- Building Goals. This is a shortcut to the Executive Reporting > Building Goals List screen.

The list contains custom and standard reports.



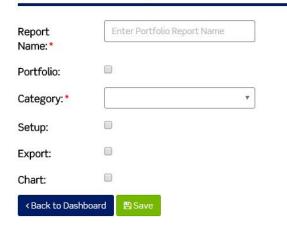
Executive Reporting: Building Setup > Dashboard > Reports > Add Report

1. Click the Add Report button.



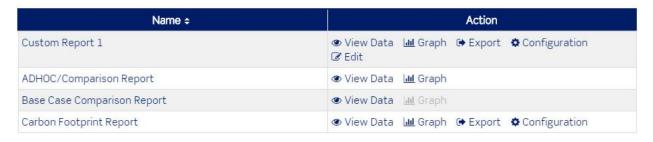
The Add Portfolio Report screen is displayed.

Add Portfolio Report



- 2. Enter the Report Name.
- 3. Click to the Portfolio checkbox to display the report under Building Portfolio Setup.
- 4. Select the category.

- 5. Click the Setup checkbox to display the Configuration link in the Actions column.
- 6. Click the Export checkbox to display the Export link in the Actions column.
- 7. Click the Chart checkbox to display the Graph link in the Actions column.
- 8. Click the Back to Dashboard button without clicking the Save button to discard changes OR
- 9. Click the Save button.
- 10. The Building Dashboard is displayed.
- 11. The saved report is displayed in the list of reports.



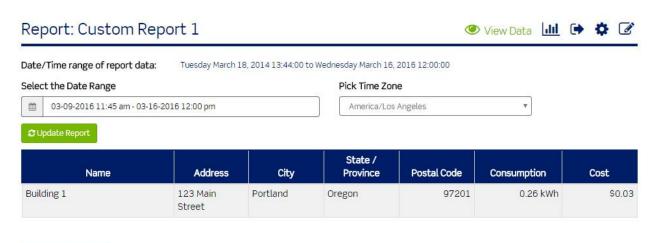
< Go Back to Building List

Executive Reporting: Building Setup > Dashboard > View Data

1. Click the View Data link in the row of the building located in the Actions column on the Building Dashboard screen.



The view data screen is the default screen when a configured report is clicked.



Note: If the report has not been configured, clicking/pressing the view data link will return the report configuration screen.

< Go Back To Building

The view data screen displays the name of the report and the date/time range of the available report data.

- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. Click the Update Report button.



The table will display address of the building, the value and the cost of consumption for the selected date range.

Executive Reporting: Building Setup > Dashboard > Graph

1. Located in the row of the report name, click the Graph link in the Actions column.



a. If the report has not been configured, clicking the Graph link will return the report configuration screen.

The graph screen is displayed. The graph screen displays the name of the report and the date/time range of the available report data.

Report: Custom Report 1 Date/Time range of report data: Tuesday March 18, 2014 13:44:00 to Monday March 14, 2016 15:15:00 Select the Date Range Pick Time Zone Data Rollup 03-07-2016 02:45 pm - 03-14-2016 03:00 pm America/Los Angeles Graph Type C Update Graph Custom Report 1 (dollars) Min: 0.009 Max: 0.009 0.01 0.005 03-07-2016 03-08-2016 03-09-2016 03-10-2016 03-11-2016 03-12-2016 03-13-2016

- A default date range is selected and a default graph is rendered.
- The graph screen allows you to set a date range, select a time zone, select data rollup, and select a graph type.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. Select a data rollup period by clicking the data rollup dropdown.
- 9. Click the period.
- 10. Select a graph type by clicking/pressing the graph type dropdown.
- 11. Click the graph type.
- 12. Click the Update Graph button.



The graph is rendered. Note: Graph types such as a line graph will allow you to zoom. Some of the graph types will not allow you to zoom.

13. Hover over the data points to view detailed information for each input.



14. Hover over the graph and click and then drag and release to zoom in.



15. Press the Reset zoom button to reset the zoom on the graph.



16. Click the Update Graph button to render the graph whenever the date range or time zones are changed.



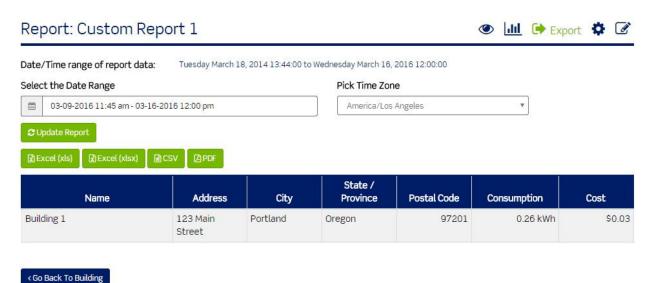
Executive Reporting: Building Setup > Dashboard > Export

1. Located in the row of the report name, click the Export link in the Actions column.



a. If the report has not been configured, clicking the Export link will return the report configuration screen.

The export data screen is displayed.



- The export data screen displays the name of the report and the date/time range of the available report data.
- The export data screen allows you to select a date range and time zone and then export the data to a text file.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.

- 6. Select the time zone by clicking/pressing the time zone dropdown.
- 7. Click the time zone.
- 8. Click the Update Report button.



- 9. The data table is refreshed and displays the building name, building location, and the value and cost of the consumption data.
- 10. Click the Excel (xls) button to export the data in an xls file format.



- 11. Click the Excel (xlsx) button to export the data in an xlsx file format OR
- 12. Click the CSV button to export the data in a comma separated values file format OR
- 13. Click the PDF button to export the data in a PDF file format.

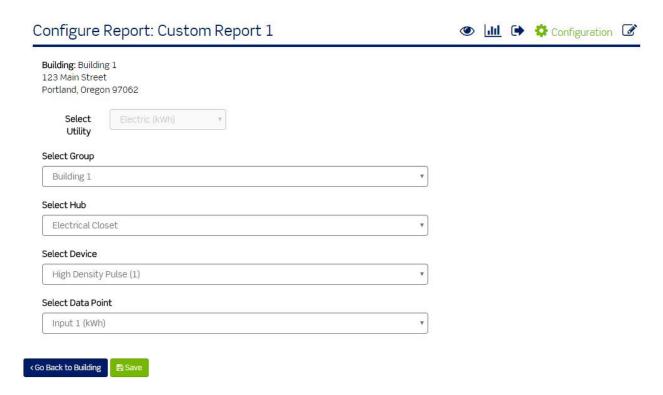
The file will download. Note: If the file does not appear to download, make sure the popup blocker in your web browser is not blocking the file.

Executive Reporting: Building Setup > Dashboard > Configuration

1. Located in the row of the report name, click the Configuration link in the Actions column. For reports without a Configuration link, click the name of the report (ADHOC/Comparison Report, Base Case Comparison Report. Etc.) to configure the report.



2. The report configuration screen is displayed.



Configuration requirements will differ by report:

- a. Custom (Add Report)
 - i. Select Utility.
 - ii. Select Group.
 - iii. Select Hub.
 - iv. Select Device.
 - v. Select Data Point.
 - vi. Click Go Back to Building without clicking the Save button to discard changes OR
 - vii. Click the Save button to save changes.
- b. ADHOC/Comparison Report *Report does not save. Must be configured when used.
 - i. Select Group 1.
 - ii. Select Hub 1.
 - iii. Select Device 1.
 - iv. Select Data Point 1.
 - v. Select Group 2.
 - vi. Select Hub 2.
 - vii. Select Device 2.
 - viii. Select Data Point 2.
 - ix. Select Date Range.
 - x. Select Time Zone.
 - xi. Click Update Report. The report table displays the time and values for each data point.
- c. Base Case Comparison Report *Report does not save. Must be configured when used.
 - i. Select a Base Case.



- ii. Select a Group.
- iii. Select a Start Date.
- iv. Select a Time Zone.
- v. Click the Update Data button. The report table displays the name of the base case, the value of the base case, the start and end date of the report, and the number of days used in the base case for the report.
- d. Carbon Footprint Report
 - i. Select the Fuel Type.
 - ii. Select Group.
 - iii. Select Hub.
 - iv. Select Device.
 - v. Select Data Point.
 - vi. Click Go Back to Building without clicking the save button to discard changes OR
 - vii. Click the Save button to save changes.

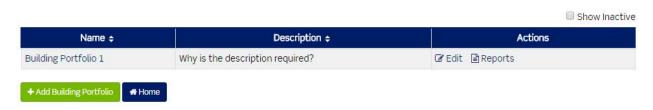
Executive Reporting Module: Building Portfolio Setup

1. Click the Building Portfolio Setup.



The Building Portfolios list screen is displayed. The Building Portfolios list screen displays a table containing a list of all saved building portfolios.

Building Portfolios



Executive Reporting: Building Portfolio Setup > Add Building Portfolio

1. Click the Add Building Portfolio button.



The Building Portfolio setup screen is displayed.

Building Portfolio: Add



- 2. Enter a name for the portfolio.
- 3. Enter a description for the portfolio.
- 4. Click the Cancel button or simply navigate out of the screen without clicking/pressing the Save button to discard changes OR
- 5. Click the Save button to save the portfolio. The building portfolio name is displayed in the Building Portfolios list.

Executive Reporting: Building Portfolio Setup > Edit Building Portfolio

1. Click the Edit link in the Actions column, which is located in the row of the report name.



The Building Portfolio screen is displayed.

Building Portfolio: Building Portfolio 1

Name	Building Portfolio 1
Description	Why is the description required?
Active	⊘

Add Building

Add	Name ÷	Address line 1 ¢	City ÷	State ÷	Zip code [‡]
•	Building 1	123 Main Street	Portland	Oregon	97201
	Building 2	123 Main Street	Denver	Colorado	80123
	Building 3	123 Main Street	New York	New York	10001



- 2. Click the field to be modified.
- 3. Enter changes.
- 4. Located in the row of the building name, click the add checkbox in the Add column to add buildings to the building portfolio.

Add	Name ¢	Address line 1 ¢	City ¢	State ¢	Zip code
-	Building 1	123 Main Street	Portland	Oregon	97201

- 5. Click the Add checkbox to add and remove buildings from the building portfolio.
- 6. Click the cancel button or simply navigate out of the screen without clicking/pressing the Save button to discard changes OR
- 7. Click the Save button to save changes.

Executive Reporting: Building Portfolio Setup > Remove Building Portfolio

1. Located in the row of the building portfolio name, click the Edit link in the Actions column.



The Building Portfolio screen is displayed.

Building Portfolio: Building Portfolio 1



Add Building

Add	Name ÷	Address line 1 ÷	City ÷	State ÷	Zip code [‡]
•	Building 1	123 Main Street	Portland	Oregon	97201
	Building 2	123 Main Street	Denver	Colorado	80123
	Building 3	123 Main Street	New York	New York	10001



2. Click the Active checkbox to remove the building portfolio from the Building Portfolios list screen.

Active



Note: When the checkbox is empty (doesn't contain a check) and the edits have been saved, the portfolio will no longer appear in the Building Portfolios list screen and you will not be able to access the building portfolio from other areas of the Building Manager Online 3.0.

- 3. Click the cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 4. Click the Save button to save changes.

Executive Reporting: Building Portfolio Setup > Adding a Removed Building Portfolio

1. To add a removed Building Portfolio, click the Edit link in the row of the building portfolio name located in the Actions column on the Building Portfolios list screen or simply click the name of the building portfolio.



The Building Portfolio screen is displayed.

Building Portfolio: Building Portfolio 1



Add Building

Add	Name ÷	Address line 1 ÷	City ÷	State ÷	Zip code [‡]
•	Building 1	123 Main Street	Portland	Oregon	97201
	Building 2	123 Main Street	Denver	Colorado	80123
0	Building 3	123 Main Street	New York	New York	10001



2. Click the Active checkbox to add the building portfolio back to the Building Portfolios list screen.

Active



- 3. Click the cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 4. Click the Save button to save changes.

Executive Reporting: Building Portfolio Setup > Reports

1. Located in the row of the report name, click the Reports link in the Actions column.



The Portfolio Reports screen is displayed.

Portfolio Reports: Building Portfolio 1

Why is the description required?

Show Inactive

Name ¢	Actions
Custom Report 1	◆ View Data Graph Export
ADHOC/Comparison Report	● View Data Lill Graph
Base Case Comparison Report	● View Data Lill Graph
Carbon Footprint Report	

< Go back to Portfolio List

- The Portfolio Reports screen displays a table containing a list of all portfolio reports.
- The Actions column links will differ based on report.

Executive Reporting: Building Portfolio Setup > Reports > View Data

1. Located in the row of the report name, click the view data link in the Actions column.

Name ÷	Actions
Custom Report 1	● View Data 📶 Graph 🕩 Export
ADHOC/Comparison Report	● Viev Graph
Base Case Comparison Report	◎ √ Lill Graph
Carbon Footprint Report	◆ View Data Lill Graph ◆ Export

- a. If the report has not been configured, clicking the view data link will return the report configuration screen.
- b. The configuration screen for Building Profile reports will differ. For some of the reports, the report must be configured each time the report is run.

The view data screen is the default screen when a configured report is clicked.

Report: Custom Report 1 ● View Data Select the Date Range Pick Time Zone 03-09-2016 11:45 am - 03-16-2016 12:00 pm America/Los Angeles State / Address Postal Code Consumption Name City **Province** Cost Building 1 123 Main Portland 97201 0.26 kWh \$0.03 Oregon Street

< Go Back To Portfolio

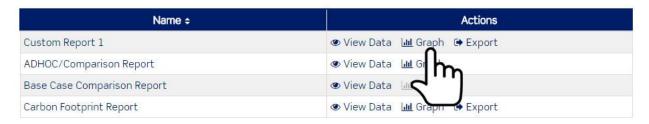
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. For the ADHOC/Comparison Report
 - a. Select Group 1
 - b. Select Hub 1
 - c. Select Device 1
 - d. Select Data Point 1
 - e. Select Group 2
 - f. Select Hub 2
 - g. Select Device 2
 - h. Select Data Point 2
- 9. For the Base Case Comparison Report
 - a. Select a Base Case
- 10. Click the Update Report button.

Update Report

11. The data table will populate. Table data will vary based on report.

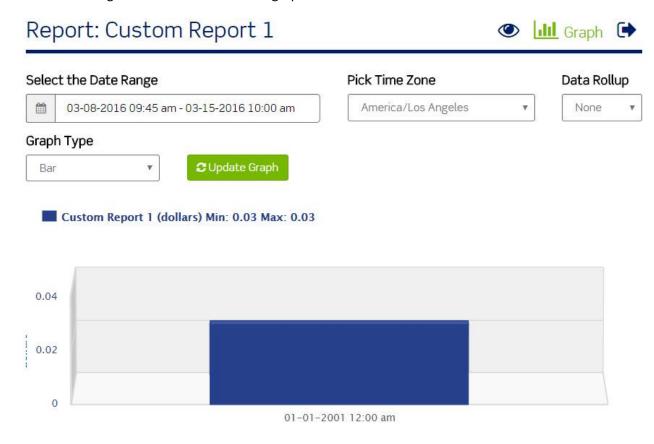
Executive Reporting: Building Portfolio Setup > Reports > Graph

1. Located in the row of the report name, click the Graph link in the Actions column.



a. If the report has not been configured, clicking/pressing the Graph link will return the report configuration screen.

A default date range is selected and a default graph is rendered.



The graph screen allows you to set a date range, select a time zone, select data rollup, and select a graph type.

- 2. Select a range of data by clicking/pressing the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking/pressing the time zone dropdown.

- 7. Select the time zone.
- 8. Select a data rollup period by clicking/pressing the data rollup dropdown.
- 9. Select the period.
- 10. Select a graph type by clicking/pressing the graph type dropdown.
- 11. Click the graph type.
- 12. Click the Update Graph button.



The graph is rendered. Note: Zoom functionality varies by graph type. Graph types such as line graphs will allow you to zoom in on the graph. Graph types such as bar graphs will not allow you zoom in on the graph.

a. Hover over the data points to view detailed information for each input.

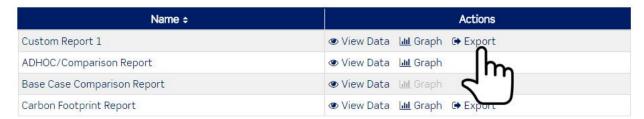


- b. Hover over the graph and click and then drag and release to zoom in. Only applicable on certain graph types.
- c. Press the Reset zoom button to reset the zoom on the graph. Only applicable on certain graph types.
- 13. Click the Update Graph button to render the graph whenever the date range or time zones are changed.



Executive Reporting: Building Portfolio Setup > Reports > Export

1. Located in the row of the report name, click the export link in the Actions column.



a. If the report has not been configured, clicking/pressing the export link will return the report configuration screen.

The export data screen is displayed.

Report: Custom Report 1



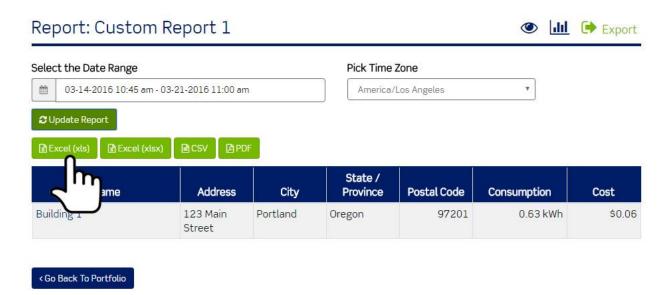
Go Back To Portfolio

- The export data screen displays the name of the report.
- The export data screen allows you to select a date range and time zone and then export the data to a text file.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Click the time zone.
- 8. Click the Update Report button.

C Update Report

The view data table is refreshed and displays the name of the building, the building location, and the value and cost of consumption data.

9. Click the Excel (xls) button to export the data in an xls file format OR



- 10. Click the Excel (xlsx) button to export the data in an xlsx file format OR
- 11. Click the CSV button to export the data in a comma separated values file format OR
- 12. Click the PDF button to export the data in a PDF file format.

The file will download. Note: If the file does not appear to download, make sure the popup blocker in your web browser is not blocking the file.

Executive Reporting Module: Virtual Meters

Virtual meters allow you to add or subtract real data points to produce virtual data points. You can only create virtual meters from real data points of the same type such as kW, Degree F, etc. Only hubs with a data upload interval of 15 minutes can be used to create Virtual meters.

1. Click the Virtual Meters button.



The Virtual Meters list screen is displayed.



- The Virtual Meters list screen contains a table listing all virtual meters added to the Building Manager Online 3.0.
- The Virtual Meters list screen contains a table and two main navigational menu items.
- The table lists all Virtual Meters added to the Building Manager Online 3.0.
- The two navigational menu items are Add New Virtual Meter and Home.
- The Virtual Meters list screen allows you to filter your virtual meters by Building.



2. Click the Home button to return to the home screen of the Building Manager Online 3.0.

Executive Reporting: Virtual Meters > Add

1. Click Add New Virtual Meter button.



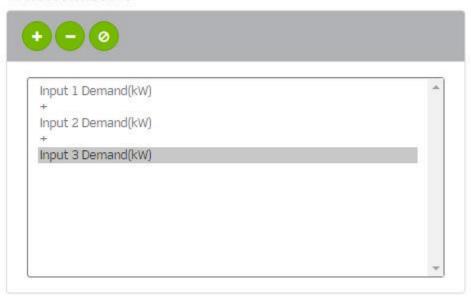
The Create Virtual Meter screen is displayed.

- 2. Enter Virtual Meter Label.
 - a. This will be the name of the Virtual Meter.
- 3. Select Building.
 - a. The purpose of this selection is help you keep track of your virtual meters by allowing you to see which building is associated with each virtual meter.
- 4. Select a Group.
 - a. Groups are located in the System Network and added, edited, and removed through the base module.
- 5. Select a Hub.
 - a. Hubs are child objects to groups.
 - b. Hubs are located below groups in the System Network and added, edited, and removed through the base module. Note: Available hub selections are based on the prior group selection.
- 6. Select Device.
 - a. Devices are child objects to hubs.
 - b. Devices are located below hubs in the System Network.

- c. As long as a device is physically connected to a hub and the hub is uploading data to the Building Manager Online 3.0, the Building Manager Online 3.0 will receive data from the hub for the device.
- 7. Select a Data Point.
 - a. Data Points are child objects to devices which are child objects to hubs.
 - b. Data Points are located in the System Network under Group > Hubs > Devices. Each device contains data points.
 - c. Note: Available data point selections are based on the prior hub selection.

The selected data point will display in the Virtual Calculations box.

Virtual Calculations



The selected data point will also display below the Virtual Data Point Definition heading.

Virtual Data Point Definition

Input 1 Demand(kW) • Input 2 Demand(kW) • Input 3 Demand(kW) Active 🗹

Note: A virtual meter formula/equation is also known as a virtual meter definition.

- 8. Click the appropriate mathematical operator.
 - a. Plus sign (+)
 - i. The plus sign (+) will add the selected data point value to the next data point value.

Virtual Calculations



- b. Subtraction sign (-)
 - i. The subtraction sign (-) will subtract the next data point value from the selected data point value.

Virtual Calculations



- 9. Clear button (Ø).
 - a. Click the clear button to remove elements of a Virtual Calculations definition. Note: The clear button will only remove a data point or value at the end of a definition/equation.
 - b. Click the last data point or operator in the definition/equation.
 - c. Click the Clear button.

Virtual Calculations



10. Click the data point dropdown and click the next data point. Note: The data point dropdown field is used for selecting the initial data point and each additional data point.



- 11. Repeat adding data points and mathematical operators until the definition is complete. Note: Virtual Meters must be of the same type (e.g., kW, Degree F, etc.).
 - a. Process for Building Virtual Meters:
 - i. Step 1 Select Data Point.
 - ii. Step 2 Select Mathematical Operator.
 - iii. Step 3 Select Data Point.

Also note: Like data points can be added and subtracted from different groups and hubs.

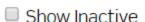
- b. Process for Building Virtual Meters using multiple groups or hubs:
 - i. Step 1 Select Data Point
 - ii. Step 2 Select Mathematical Operator
 - iii. Step 3 Select Group
 - iv. Step 4 Select Hub
 - v. Step 5 Select Data Point
- 12. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking/pressing the Save button to discard changes OR
- 13. Click the Reset Selections button to clear the screen and start over OR
- 14. Click the Save button to save the virtual meter. The virtual meters list screen is displayed and the newly created virtual meter is listed.

Virtual Meters



Executive Reporting: Virtual Meters > Edit

1. Click the Edit link in the row of the virtual meter located in the Actions column on the Virtual Meters list screen or simply click the name of the virtual meter.





The virtual meter edit screen is displayed.

Edit Virtual Meter

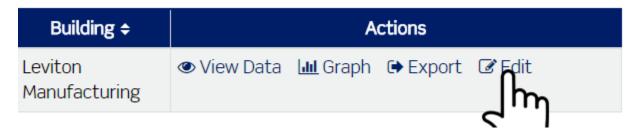
Virtual meters allow you to add or subtract real data points to view your data. You can only create virtual meters from real data points of the same type Only HUBs with a data upload interval of 15 minutes can be used to create Virtual meters Step 1 Select Data Point Step 2 Select Mathematical Operator Step 3 Select Data Point Repeat steps to continue building the virtual meter. Click the Save button when you are finished building your virtual meter Virtual Calculations Virtual Meter Number 1 Building for Virtual Meter Leviton Manufacturing 20497 SW Teton Avenue, Tualatin Ol Select Group Phase C Real Power(kW) 001EC6001BB0-3 Select Hub Select Device Select Data Point Virtual Data Point Definition Hvac Loads Demand(kW) 001EC6001BB0-1 ♥ Phase A Real Power(kW) 001EC6001BB0-3 ♥ Phase C Real Power(kW) 001EC6001BB0-3

2. You can:

- a. Change the label (name) of the meter.
- b. Select a Building for the Virtual Meter.
- c. Select additional Groups.
- d. Select additional hubs (must first select the group).
- e. Select additional data points (must first select the hub).
- f. Add and remove data points and operators to and from the Virtual Data Point Definition.
- 3. Make the necessary edits.
- 4. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking the Save button to discard changes OR
- Click the Reset Selections button to clear the screen and start over OR
- 6. Click the Save button to save changes.

Executive Reporting: Virtual Meters > Remove

1. Click the Edit link in the row of the virtual meter located in the Actions column on the Virtual Meters list screen or simply click the name of the virtual meter.



The virtual edit screen is displayed.

Edit Virtual Meter

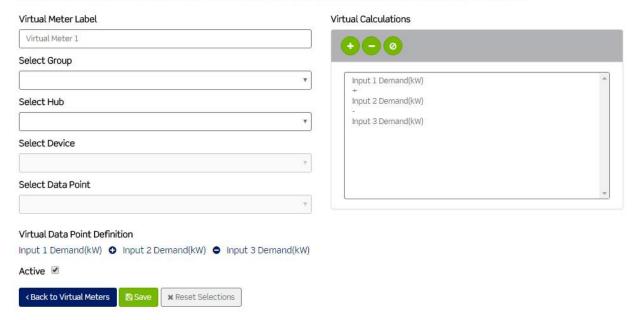
Virtual meters allow you to add or subtract real data points to view your data. You can only create virtual meters from real data points of the same type.

Only HUBs with a data upload interval of 15 minutes can be used to create Virtual meters.

Process for Building Virtual Meters:

- · Step 1 Select Data Point
- Step 2 Select Mathematical Operator
- · Step 3 Select Data Point

Repeat steps to continue building the virtual meter. Click the Save button when you are finished building your virtual meter.



2. Click the Active checkbox to remove the virtual meter from the virtual meter list screen.

Active



- 3. When the checkbox is empty (doesn't contain a check) and the screen has been saved, the virtual meter will no longer appear in the virtual meter list screen and you will not be able to access the virtual meter from other areas of the Building Manager Online 3.0.
- 4. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save the change.

Executive Reporting: Virtual Meters > Adding a Removed Virtual Meter

1. To add a removed virtual meter, click the Edit link in the row of the virtual meter located in the Actions column on the virtual meter list screen or simply click the name of the virtual meter.



The virtual edit screen is displayed.

Edit Virtual Meter

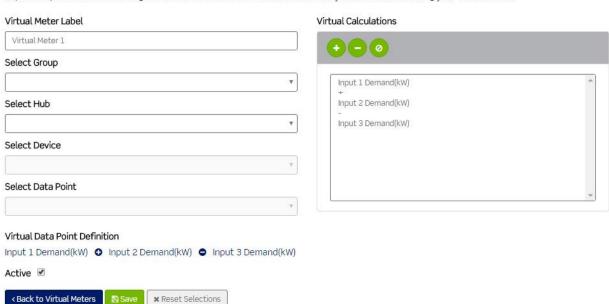
Virtual meters allow you to add or subtract real data points to view your data. You can only create virtual meters from real data points of the same type.

Only HUBs with a data upload interval of 15 minutes can be used to create Virtual meters.

Process for Building Virtual Meters:

- · Step 1 Select Data Point
- · Step 2 Select Mathematical Operator
- Step 3 Select Data Point

Repeat steps to continue building the virtual meter. Click the Save button when you are finished building your virtual meter.



2. Click the Active checkbox to add the virtual meter back to the virtual meters list screen.

Active



- 3. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 4. Click the Save button activate the virtual meter.

Executive Reporting: Virtual Meters > View Data

1. Click the View Data link in the Actions column of the virtual meter list screen.



The view data screen is displayed.



- The view data screen displays the name of the virtual meter, the definition (equation) used to calculate the virtual data points.
- The view data screen displays three menu items.
- The first menu item is View Data. The View Data link is also located on the virtual meters list screen under the Actions column.



- This is the default view for a virtual meter.
- The view data screen displays a table containing all data and virtual data points for the selected date range.
- 2. Select a range of data by clicking/pressing the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking/pressing the time zone dropdown.
- 7. Select the time zone.
- 8. Click the Update Table Data button.

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The data table will refresh based on the selections.

9. Scroll down to the bottom of the screen to page through data.



10. Click the Update Table Data button to populate the table with data whenever the date range or time zone is changed.



Executive Reporting: Virtual Meters > Graph

1. Click the Graph link in the virtual meters list screen under the Actions column.

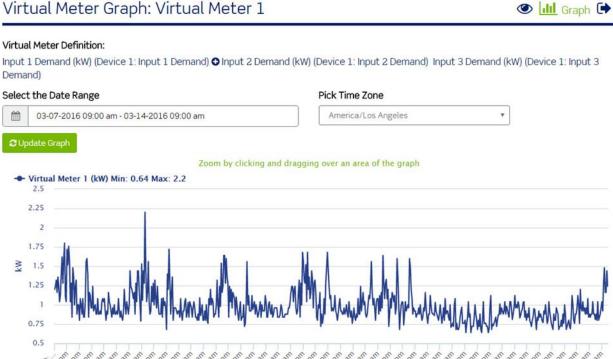


Graph is the second menu item.



The graph screen displays the name of the virtual meter and the definition (equation) used to calculate the virtual data points.

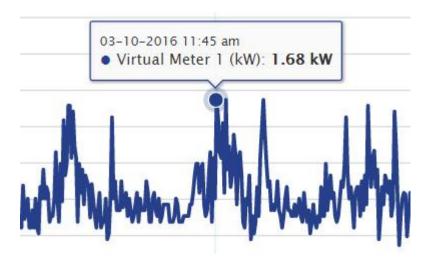
Virtual Meter Graph: Virtual Meter 1



- A default date range is selected and a default graph is rendered.
- The graph screen allows you to set a date range and select a time zone.
- 2. Select a range of data by clicking the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking the time zone dropdown.
- 7. Select the time zone.
- 8. Click the Update Graph button.



The graph is rendered onscreen. Hover over the data points to view detailed information for each input.



9. Hover over the graph and click and then drag and release to zoom in.



10. Press the Reset zoom button to reset the zoom on the graph.



11. Click the Update Graph button to render the graph whenever the date range or time zones are changed.



Executive Reporting: Virtual Meters > Export

1. Click the Export link located in the virtual meters list screen under the Actions column.



Export Data is the third menu item.



The Export Data screen is displayed.



- 2. The export data screen displays the name of the virtual meter and the definition (equation) used to produce data.
- 3. The export data screen allows you to select a date range and time zone and then export the data to a text file.
- 4. Select a range of data by clicking the date range picker.
- 5. Select a start date.
- 6. Select an end date.

- 7. Click the Apply button.
- 8. Select the time zone by clicking/pressing the time zone dropdown.
- 9. Select the time zone.
- 10. Click the Excel (xls) button to export the data in an xls file format OR



- 11. Click the Excel (xlsx) button to export the data in an xlsx file format OR
- 12. Click the CSV button to export the data in a comma separated values file format.

The file will download. Note: If the file does not appear to download, make sure the popup blocker in your web browser is not blocking the file.

Executive Reporting Module: Executive Reporting Dashboard

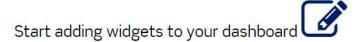
The Executive Reporting Dashboard allows for customizable metrics to be selected from a menu of options. Any metrics defined will be saved for future use on the dashboard.

1. Click the Executive Reporting Dashboard button.



The Executive Dashboard screen is displayed.

Executive Dashboard



The Executive Dashboard screen contains two menu items.



The first menu item is Executive Reporting Home. This is a back button used to return you to the Executive Reporting Module home screen.



Executive Reporting Module: Executive Reporting Dashboard > Edit

The second menu item is enable edit mode.



1. Click the enable edit mode menu item. Note: The enable edit mode menu item is located in the top right menu and in the body of the page.

The Executive Dashboard edit screen displays four menu items.



Executive Reporting Module: Executive Reporting Dashboard > Edit > Add Widget The first menu item is add new widget.

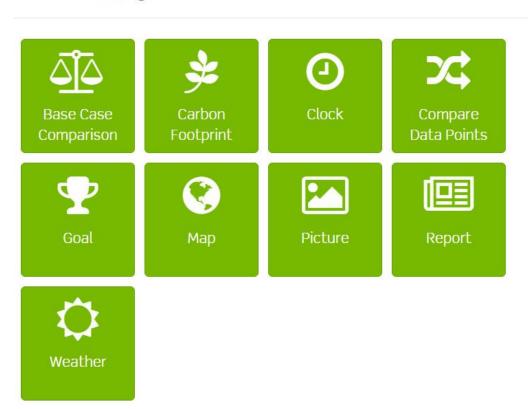
Executive Dashboard



122 | Page

- 1. Click the Add New Widget menu item.
- 2. The Add New Widget popup screen is displayed.
 - a. Widget controls are located in the top right corner of a widget.
 - b. All widgets require configuration prior to use.

Add new widget



Widgets include:

a. **Base Case Comparison**: Use this widget to compare a specific meter reading against the basecase.



- i. Base Case Comparison widget controls:
 - 1. Reload widget content. This control refreshes widget data.

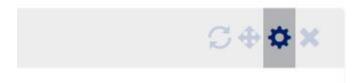
X



2. Change widget location. This control allows you to reposition the widget in a layout for display.



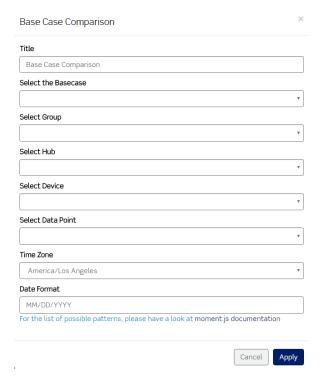
3. Edit widget configuration. This control provides access to the Base Case Comparison widget configuration screen.



4. Remove widget. This control removes the widget from the executive dashboard. Note: Saved configuration settings are deleted with the widget.



- ii. Base Case Comparison widget configuration:
 - 1. Enter a Title for the widget.
 - 2. Select the Basecase.
 - 3. Choose Group.
 - 4. Choose Hub.
 - 5. Choose Device.
 - 6. Choose Data Point.
 - 7. Choose Time Zone.
 - 8. Enter Date Format.
 - 9. Click the cancel button to discard changes OR
 - 10. Click the Apply button to save changes.



b. Carbon Footprint: Use this widget to display the carbon footprint report for a building or portfolio.



- iii. Carbon Footprint widget controls:
 - 1. Reload widget content. This control refreshes widget data.



2. Change widget location. This control allows you to reposition the widget in a layout for display.



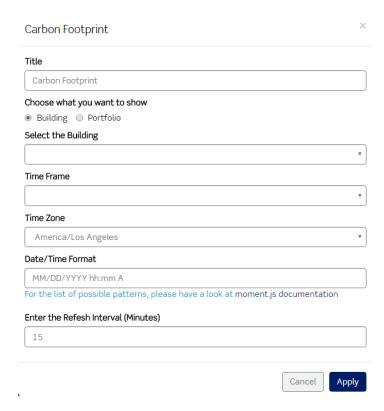
3. Edit widget configuration. This control provides access to the Carbon Footprint widget configuration screen.



4. Remove widget. This control removes the widget from the executive dashboard. Note: Saved configuration settings are deleted with the widget.



- iv. Carbon Footprint widget configuration:
 - 1. Enter a Title for the widget.
 - 2. Click radio box for Building or Portfolio.
 - 3. Select either Building or Portfolio base on the prior selection.
 - 4. Select Time Frame.
 - 5. Select Time Zone.
 - 6. Enter Data and Time Format.
 - 7. Enter data refresh intervals.
 - 8. Click the cancel button to discard changes OR
 - 9. Click the Apply button to save changes.



c. **Clock**: Use this widget to display date and time in a given time zone.



- v. Clock widget controls:
 - 1. Change widget location. This control allows you to reposition the widget in a layout for display.



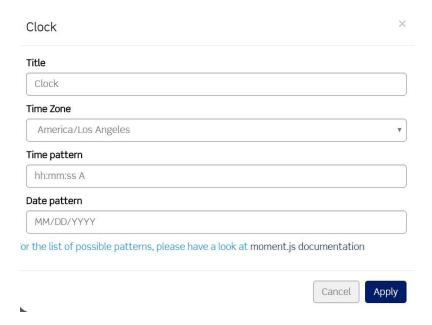
2. Edit widget configuration. This control provides access to the Clock widget configuration screen.



3. Remove widget. This control removes the widget from the executive dashboard. Note: Saved configuration settings are deleted with the widget.



- vi. Clock widget configuration:
 - 1. Enter a Title for the widget.
 - 2. Select a Time Zone.
 - 3. Enter a Time pattern.
 - 4. Enter a Date pattern.
 - 5. Click the cancel button discard changes.
 - 6. Click the Apply button to save changes.



d. Compare Data Points: This widget will help you to compare a set of data points over a period of time.



- vii. Compare Data Points widget controls:
 - 1. Reload widget content. This control refreshes widget data.



2. Change widget location. This control allows you to reposition the widget in a layout for display.



3. Edit widget configuration. This control provides access to the Compare Data Points widget configuration screen.

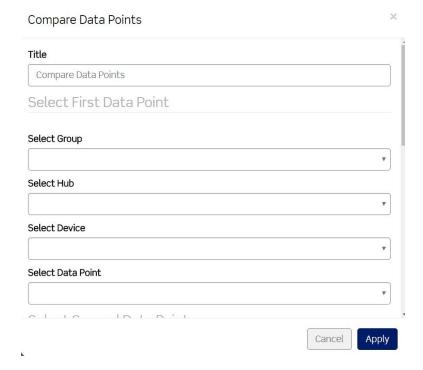


4. Remove widget. This control removes the widget from the executive dashboard. Note: Saved configuration settings are deleted with the widget.



- viii. Compare Data Points widget configuration:
 - 1. Enter a Title for the widget.
 - 2. Select first data point.
 - a. Select Group.

- b. Select Hub.
- c. Select Device.
- d. Select Data Point.
- 3. Select second data point.
 - a. Select Group.
 - b. Select Hub.
 - c. Select Device.
 - d. Select Data Point.
- 4. Select Time Frame.
- 5. Select Time Zone.
- 6. Enter Date Format.
- 7. Enter the data refresh interval.
- 8. Click the cancel button discard changes.
- 9. Click the Apply button to save changes.



e. Goal: Use this widget to compare the current value against the goal value for the building.

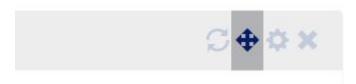


ix. Goal widget controls.

1. Reload widget content. This control refreshes widget data.



2. Change widget location. This control allows you to reposition the widget in a layout for display.



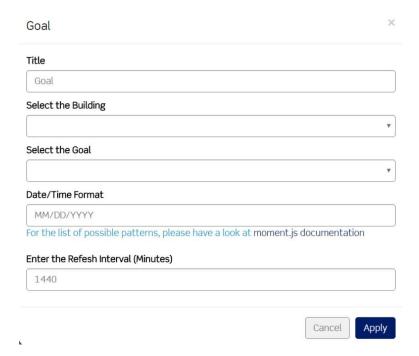
3. Edit widget configuration. This control provides access to the Goal widget configuration screen.



4. Remove widget. This control removes the widget from the executive dashboard. Note: Saved configuration settings are deleted with the widget.



- x. Goal widget configuration:
 - 1. Enter a Title for the widget.
 - 2. Select the Building.
 - 3. Select the Goal.
 - 4. Enter Date and Time format.
 - 5. Enter data refresh interval.
 - 6. Click the cancel button discard changes OR
 - 7. Click the Apply button to save changes.



f. Map: Set and display the map location of a building.



- xi. Map widget controls:
 - 1. Reload widget content. This control refreshes widget data.



2. Change widget location. This control allows you to reposition the widget in a layout for display.



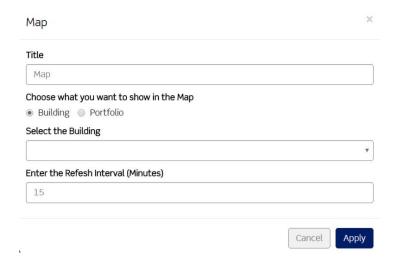
3. Edit widget configuration. This control provides access to the Map widget configuration screen.



4. Remove widget. This control removes the widget from the executive dashboard. Note: Saved configuration settings are deleted with the widget.



- xii. Map widget configuration:
 - 1. Enter a Title for the widget.
 - 2. Click radio box for Building or Portfolio.
 - 3. Select either Building or Portfolio base on the prior selection.
 - 4. Enter data refresh interval.
 - 5. Click the cancel button discard changes OR
 - 6. Click the Apply button to save changes.



g. Picture: Upload and display a picture.



xiii. Picture widget controls:

1. Change widget location. This control allows you to reposition the widget in a layout for display.



2. Edit widget configuration. This control provides access to the Picture widget configuration screen.



3. Remove widget. This control removes the widget from the executive dashboard. Note: Saved configuration settings are deleted with the widget.



xiv. Picture widget configuration:

- 1. Enter a Title for the widget.
- 2. Enter a Description.
- 3. Select image to upload.
- 4. Click the cancel button to discard changes OR
- 5. Click the Apply button to save changes.



h. Report: The ability to allocate cost (percentage) across all the data points or virtual data points of a HUB.



- xv. Report widget controls:
 - 1. Reload widget content. This control refreshes widget data.



2. Change widget location. This control allows you to reposition the widget in a layout for display.



3. Edit widget configuration. This control provides access to the Report widget configuration screen.

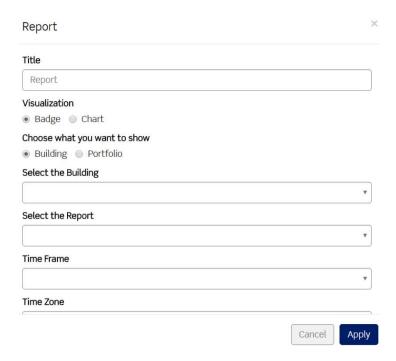


4. Remove widget. This control removes the widget from the executive dashboard. Note: Saved configuration settings are deleted with the widget.



xvi. Report widget configuration:

- 1. Enter a Title for the widget.
- 2. Click radio box for Badge or Chart.
 - a. If Chart is clicked/pressed, select Chart Type.
- 3. Click radio box for Building or Portfolio.
- 4. Select the Building or Portfolio.
- 5. Select the Report.
- 6. Select the Time Frame.
- 7. Select the Time Zone.
- 8. Enter the Date and Time format.
- 9. Enter the data refresh interval. 10. Click the cancel button to discard changes OR
- 11. Click the Apply button to save changes.



i. Weather: Weather information can be brought into the executive dashboard to crossreference weather data with the metrics.



- xvii. Weather widget controls:
 - 1. Reload widget content. This control refreshes widget data.



2. Change widget location. This control allows you to reposition the widget in a layout for display.



3. Edit widget configuration. This control provides access to the Weather widget configuration screen.



4. Remove widget. This control removes the widget from the executive dashboard. Note: Saved configuration settings are deleted with the widget.



xviii. Weather widget configuration:

- 1. Enter a Title for the widget.
- 2. Select the Building.
- 3. Enter data refresh interval.
- 4. Click the cancel button to discard changes.
- 5. Click the Apply button to save changes.

Executive Reporting Module: Executive Reporting Dashboard > Edit > Edit Dashboard

The second menu item is edit dashboard.

1. Click the edit dashboard menu item.

edit dashboard **Executive Dashboard** ODEX

The edit dashboard popup screen is displayed. The edit dashboard popup screen provides you with the ability to add a title to the dashboard and to set the layout or structure of the dashboard.

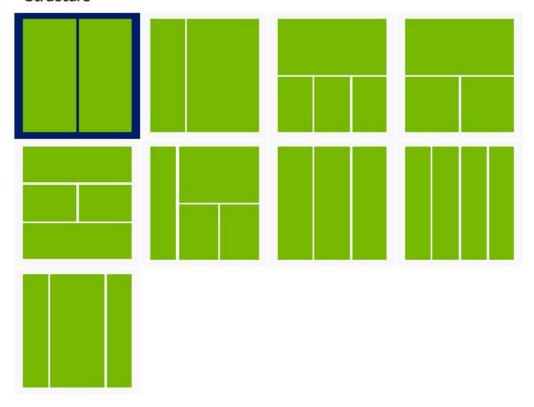
Edit Dashboard



Title

Executive Dashboard

Structure



Structured layouts include:

a.	6-6	2 Columns (50%, 50%)
h	10	2 Columna (250/ 750/)

b. 4-8 2 Columns (25%, 75%)

c. 12/4-4-4 2 Rows (100%, 33%, 33%, 33%)

d. 12/6-6 2 Rows (100%, 50%, 50%)

3 Rows (100%, 50%, 50%, 100%) e. 12/6-6/12

f. 3/9 (12/6-6) 2 Columns, 2 Rows (25%, 75%, 37%, 37%)

g. 4-4-4 3 Columns (33%, 33% 33%)

4 Columns (25%, 25%, 25%, 25%) h. 3-3-3-3

3-6-3 3 Columns (25%, 50%, 25%) 2. To add a title to the dashboard, click in the Title field and enter the title to be displayed on the Executive Dashboard.

Title

Executive Dashboard

- 3. Click a structure icon to set the layout for the dashboard.
- 4. Click the Close button.

Executive Reporting Module: Executive Reporting Dashboard > Edit > Save

save changes O # E x

Executive Dashboard

The third menu item is save changes. Clicking the save changes icon will save all changes made to the executive dashboard and then set the executive dashboard screen in view mode.

Executive Reporting Module: Executive Reporting Dashboard > Edit > Undo



Executive Dashboard

The fourth menu item is undo changes. Clicking/pressing the undo changes button will discard all changes made to the executive dashboard and then set the executive dashboard screen in view mode. Note: If edits have been made but the edits have not been saved and you are trying to navigate out of the screen, you will be prompted to save or discard changes.

Executive Reporting Module: Executive Reporting Alerts Overview

1. Click the Executive Reporting Alerts button.



The Executive Reporting Alerts screen is displayed.







Name ¢	Building \$	Type ¢	Operator \$	Value \$	Actions
kWh Too Low	Building 1: Leviton Manufacturing	Consumption	less than (<)	1.00	♂ Edit



The Executive Reporting Alerts screen contains two menu items and a table displaying a list of all alerts. The first menu item is Alerts. This is the default view.

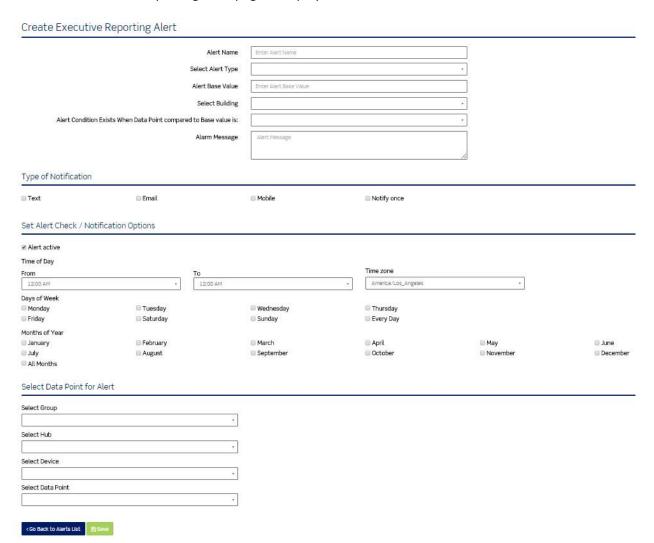


Executive Reporting Module: Executive Reporting Alerts > Add

1. Click the Add New Alert button.



The Create Executive Reporting Alert page is displayed.



- 2. Enter an Alert Name.
- 3. Select an Alert Type.
 - a. Demand (to ensure that the electrical load in question does not exceed a predetermined level, which can incur unintentional costs).
 - b. Consumption (to remain within an energy budget for a specific date range)
- 4. Enter a Base Value (defined as the threshold against which an alert is created, such as demand greater than or equal to 500kW).
- 5. Select a Building.
 - a. Available buildings are active buildings located in the Buildings list screen.
- 6. Select a condition to be used when comparing a data point to the base value.
 - a. Less than (<): An alert will trigger when the data point value is less than the base value.

- b. Less than equal (<=): An alert will trigger when the data point value is less than or equal to the base value.
- c. Equal (=): An alert will trigger when the data point value is equal to the base value.
- d. Greater than equal (>=): An alert will trigger when the data point value is greater than or equal to the base value.
- e. Greater (>): An alert will trigger when the data point value is greater than the base value.
- 7. Enter an Alert Message.
- 8. Select an Alert Type.
- 9. Select the Type of Notification.
 - a. Text (an SMS text). You will receive alert information via text.
 - b. Email (standard email address). You will receive alert information via email.
 - c. Mobile (mobile app for BMO 3.0 Executive Reporting Module). You will receive an alert on the mobile app if the mobile app has been installed and configured.
 - d. Notify once (single notification—user will not be notified if the condition reoccurs).
- 10. Check the alert Active checkbox to make the alert inactive.
- 11. Set the time of day.
- 12. Select the days of the week.
- 13. Select the months of the year.
- 14. Select Group.
 - a. Groups are located in the System Network and added, edited, and removed through the base module.
- 15. Select Hub.
 - a. Hubs are child objects to groups.
 - b. Hubs are located below groups in the System Network and added, edited, and removed through the base module. Note: Available hub selections are based on the prior group selection.
- 16. Select Device.
 - a. Devices are child objects to hubs.
 - b. Devices are located below hubs in the System Network.
 - c. As long as a device is physically connected to a hub and the hub is uploading data to the Building Manager Online 3.0, the Building Manager Online 3.0 will receive data from the hub for the device.
- 17. Select Data point.
 - a. Data Points are child objects to devices which are child objects to hubs.
 - Data Points are located in the System Network under Group > Hubs > Devices. Each
 device contains data points. Note: Available data point selections are based on the prior
 hub selection.
- 18. Click the Go Back to Alerts List button or simply navigate out of the screen without clicking the Save button to discard changes.
- 19. Click the Save button to save changes. The Alert is added to the Alerts list screen.

Executive Reporting Module: Executive Reporting Alerts > Edit

1. Click the Edit link in the row of the alert located in the Actions column on the alerts list screen or simply click the name of the alert.

Executive Reporting Alerts





kWh Too Low Building 1: Consumption less than (<) 1.00 Edit Leviton Manufacturing	Name ¢	Building \$	Type ¢	Operator \$	Value \$	Actions
	kWh Too Low	Leviton	Consumption	less than (<)	1.00	Edit .

From here, you can change:

- a. Name of the alert.
- b. Type of the alert.
- c. Base value of the alert.
- d. Change the selected building of the alert.
- e. Alert conditions.
- f. Alert message.
- g. The type of notification.
- h. Time of day of the alert.
- i. Days of Week of the alert.
- j. Months of Year of the alert.
- k. Selected group of the alert.
- I. Selected hub of the alert.
- m. Selected device of the alert.
- n. Selected data point of the alert.
- 3. Make the necessary edits.
- 4. Click the Back to Alerts List button or simply navigate out of the screen without clicking/pressing the Save button to discard changes.
- 5. Click the Save button to save changes.

Executive Reporting Module: Executive Reporting Alerts > Remove

1. Click the Edit link in the row of the alert located in the Actions column on the alerts list screen or simply click the name of the alert.

Executive Reporting Alerts







2. Click the Active checkbox to remove the alert from the executive reporting alerts list screen.

Alert active

- 3. When the checkbox is empty (doesn't contain a check) and the screen has been saved, the alert will no longer appear in the executive reporting alerts list screen and you will not be able to access the alert from other areas of the Building Manager Online 3.0.
- 4. Click the Back to Alerts List button or simply navigate out of the screen without clicking/pressing the Save button to discard changes.
- 5. Click the Save button to save changes.

Executive Reporting Module: Executive Reporting Alerts > Adding Removed Alerts

1. To add a removed alert, click the Edit link in the row of the alert located in the Actions column on the executive reporting alerts list screen or simply click the name of the alert.

Executive Reporting Alerts





Show Inactive

2. Click the Active checkbox to add the alert back to the executive reporting alerts list screen.

Alert active

- 3. Click the Back to Alerts List button or simply navigate out of the screen without clicking the Save button to discard changes.
- 4. Click the Save button to save the change.

Executive Reporting Module: Executive Reporting Alerts > Contacts > Add

1. The second menu item is Contacts. Click the Contacts menu item.



The Contacts list screen is displayed.

Executive Reporting Alerts: Contact Points



Points of contact to send alert notifications to.

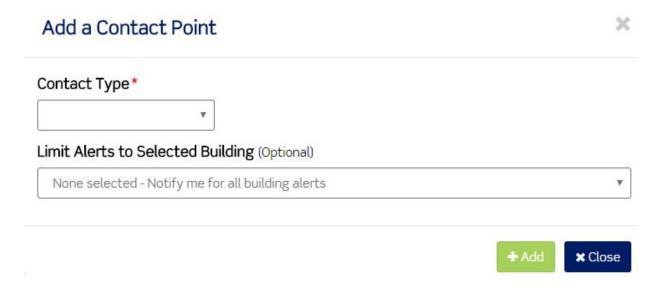
Show Inactive

Type -	Value \$	Building	Actions		
E-Mail	user1@leviton.com	Building 1	De-Activate	m Delete	

The contacts screen displays a table containing a list of contacts. The contact table contains:

- a. The type of contact (Email, SMS Text).
- b. The value for the contact (Email Address for Email, Phone Number for SMS).
- c. The name of the building associated with the contact.
- d. The ability to De-Activate, Activate, or Delete a contact.
- 2. Click the Add Contact Point button.

The Add a Contact Point window is displayed.



- 3. Select the Contact Type.
 - a. Email
 - b. SMS (text)
- 4. Enter the Contact Value (field displays after selecting the Contact Type).
 - a. Enter email address when Email is selected as the Contact Type.
 - b. Enter phone number when SMS is selected as the Contact Type.
- 5. Select Building.
 - a. Available buildings are active buildings located in the Buildings list screen.
 - b. The default selection is All Buildings.
 - c. Click the Limit Alerts to the Selected Building to select a building.
 - d. Click the building.
- 6. Click the Close button to discard changes OR
- 7. Click the Add button. The contact is added to the Contact Points list.

Executive Reporting Module: Executive Reporting Alerts > Contacts > Deactivate/Activate/Delete

1. To Deactivate: Click the De-Activate link in the row of the contact point located in the Actions column on the contact points list screen.



2. To Activate: Click the Activate link in the row of the contact point located in the Actions column on the contact point list screen.



3. To Delete: To delete a contact point, click the Delete link in the row of the contact point located in the Actions column on the contact points list screen.

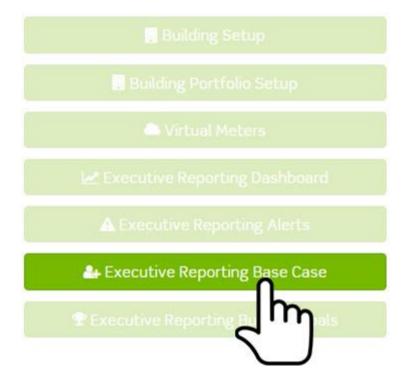


4. Click the Show Inactive checkbox to toggle the list between active and inactive contacts. Note: Deleted contacts are permanently removed from Building Manager Online 3.0.

Executive Reporting Module: Executive Reporting Base Case Overview

A base case is a baseline energy usage measurement at the data point level or virtual meter level. The measurement is based on energy cost and energy usage for a defined period of time.

1. Click the Executive Reporting Base Case button.



The Executive Reporting Base Cases list screen is displayed.



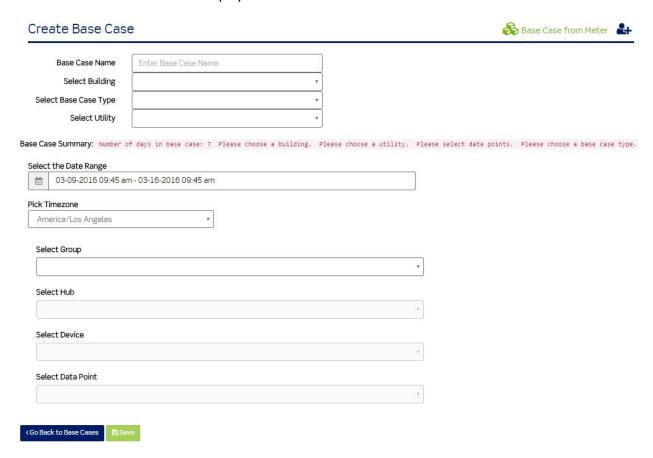
2. The Executive Reporting Base Cases screen contains a table displaying a list of all base cases.

Executive Reporting Module: Executive Reporting Base Case > Add

1. Click the Add New Base Case button.



The Create Base Case screen is displayed.



The Create Base Case screen contains two menu items, which are explained below.

Executive Reporting Module: Executive Reporting Base Case > Add > Create Base Case from Meter

The first menu item is Base Case from Meter. This is the default view.

1. Click the Base Case from Meter menu item.



- 2. Enter Base Case Name.
- 3. Select Building.
 - a. Available buildings are active buildings located in the Buildings list screen.
- 4. Select Base Cases Type.
- 5. Select Utility.
- 6. Select a range of data by clicking the date range picker.
- 7. Select the time zone.
- 8. Select Group.
 - a. Groups are located in the System Network and added, edited, and removed through the base module.
- 9. Select Hub.
 - a. Hubs are child objects to groups.
 - b. Hubs are located below groups in the System Network and added, edited, and removed through the base module. Note: Available hub selections are based on the prior group selection.
- 10. Select Device.
 - a. Devices are child objects to hubs.
 - b. Devices are located below hubs in the System Network.
 - c. As long as a device is physically connected to a hub and the hub is uploading data to the Building Manager Online 3.0, the Building Manager Online 3.0 will receive data from the hub for the device.
- 11. Select Data point.
 - a. Data Points are child objects to devices which are child objects to hubs.
 - b. Data Points are located in the System Network under Group > Hubs > Devices. Each device contains data points.
- 12. Click the Go Back to Base Cases button or simply navigate out of the screen to discard changes OR
- 13. Click the Save button to save changes. The base is added to the Base Cases list screen.

Executive Reporting Module: Executive Reporting Base Case > Add > User Entered Base Case

The second menu item is User Entered Base Case.

1. Click the User Entered Base Case menu item.



2. Enter the Base Case Name.

- 3. Select Building.
 - a. Available buildings are active buildings located in the Buildings list screen.
- 4. Select Base Case Type.
 - a. Cost (energy costs/kWh)
 - b. Cost (Usage)/energy cost for square footage of building
 - c. Demand (average—typical throughout the day in kWh)
 - d. Demand (highest load in kWh at any given time)
 - e. Usage (how much energy used in kWh)
 - f. Usage (Consumption)/ energy usage for square footage of building
- 5. Select Utility—gas, water, electric
- 6. Enter base case value.
- 7. Choose base case units (kWh, gallons, etc.)
- 8. Enter length of time (days).
- 9. Click the Go Back to Base Cases button or simply navigate out of the screen to discard changes.
- 10. Click the Save button to save changes.

Executive Reporting Module: Executive Reporting Base Case > Edit

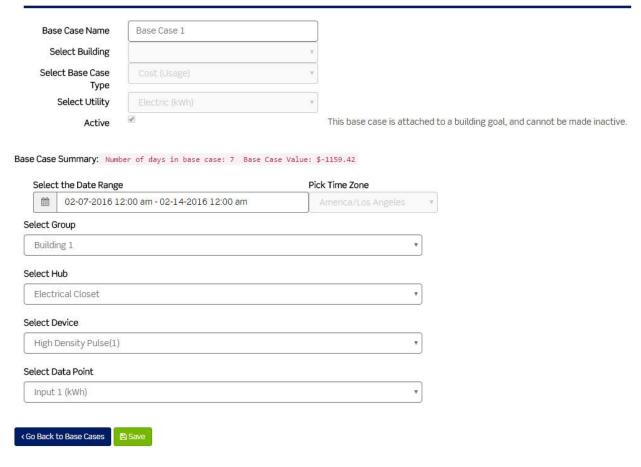
1. Click the Edit link in the row of the base case located in the Actions column on the executive reporting base cases list screen or simply click the name of the base case.

Executive Reporting Base Cases



The edit base case screen is displayed.

Edit Base Case: Base Case 1



From this screen you can change:

- a. Base Case Name.
- b. Selected building.
 - i. Available buildings are active buildings located in the Buildings list screen.
- c. Selected date range.
- d. Selected group.
 - i. Groups are located in the System Network and added, edited, and removed through the base module.
- e. Selected hub.
 - i. Hubs are child objects to groups.
 - ii. Hubs are located below groups in the System Network and added, edited, and removed through the base module.
 - iii. Note: Available hub selections are based on the prior group selection.
- f. Selected device.
 - i. Devices are child objects to hubs.
 - ii. Devices are located below hubs in the System Network.

- iii. As long as a device is physically connected to a hub and the hub is uploading data to the Building Manager Online 3.0, the Building Manager Online 3.0 will receive data from the hub for the device.
- g. Selected data point.
 - i. Data Points are child objects to devices which are child objects to hubs.
 - ii. Data Points are located in the System Network under Group > Hubs > Devices. Each device contains data points.
- 2. Make the necessary edits.
- 3. Click the Back to Base Cases button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 4. Click the Save button to save changes.

Executive Reporting Module: Executive Reporting Base Case > Remove

1. Click the Edit link in the row of the base case located in the Actions column on the executive reporting base cases list screen or simply click the name of the base case.

Executive Reporting Base Cases



2. Click the Active checkbox to remove the alert from the executive reporting base cases screen.





- 3. When the checkbox is empty (doesn't contain a check) and the screen has been saved, the base case will no longer appear in the executive reporting base cases list screen and you will not be able to access the base case from other areas of the Building Manager Online 3.0.
- 4. Click the Back to Base Cases button or simply navigate out of the screen without clicking/pressing the Save button to discard changes OR
- 5. Click the Save button to save the change.

Executive Reporting Module: Executive Reporting Base Case > Adding Removed Base Case

To add a removed base case, click the Edit link in the row of the base case located in the Actions
column on the executive reporting base cases list screen or simply click the name of the base
case.

Executive Reporting Base Cases



2. Click the Active checkbox to add the base case back to the executive reporting base cases list screen.





- 3. Click the Back to Base Cases button or simply navigate out of the screen without clicking/pressing the Save button to discard changes OR
- 4. Click the Save button to save the change.

Executive Reporting Module: Executive Reporting Building Goals Overview

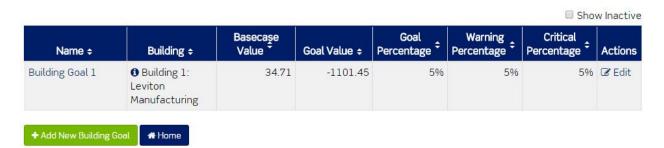
Executive reporting building goals allows the ability to set goals for usage/consumption at the building level based on the base case.

1. Click the Executive Reporting Building Goals button.



The building goal list screen is displayed.

Building Goal List



The building goal list screen displays a table containing a list of all building goals.

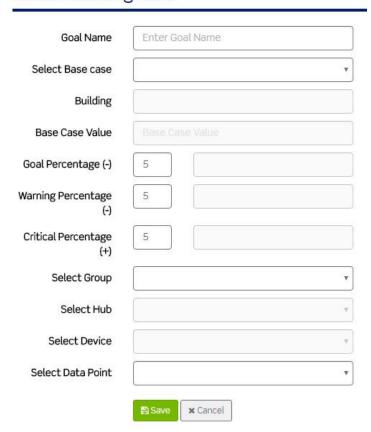
Executive Reporting Module: Executive Reporting Building Goals > Add

1. Click the Add New Building Goal button.

+ Add New Building Goal

The Create Building Goal list screen is displayed.

Create Building Goal

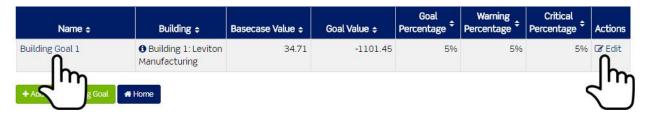


- 2. Enter the Goal Name.
- 3. Select a Base Case. Note: A base case must be added to the Building Manager Online 3.0 prior to adding a goal.
- 4. The Building field is populated with the building selected from the base case.
- 5. The Base Case Value field is populated with the base case value defined in the base case.
- 6. Set the goal percentage. The default value is 5, indicating a 5% reduction.
- 7. Set the warning percentage. The default value is 5, indicating a 5% buffer below the actual goal value.
- 8. Set the critical percentage. The default value is 5, indicating a 5% buffer above the actual goal value.
 - a. Change the selected group.
 - i. Groups are located in the System Network and added, edited, and removed through the base module.
 - b. Change the selected hub.
 - i. Hubs are child objects to groups.
 - ii. Hubs are located below groups in the System Network and added, edited, and removed through the base module.
 - iii. Note: Available hub selections are based on the prior group selection.

- c. Change the selected device.
 - i. Devices are child objects to hubs.
 - ii. Devices are located below hubs in the System Network.
 - iii. As long as a device is physically connected to a hub and the hub is uploading data to the Building Manager Online 3.0, the Building Manager Online 3.0 will receive data from the hub for the device.
- d. Change the selected data point.
 - i. Data Points are child objects to devices which are child objects to hubs.
 - ii. Data Points are located in the System Network under Group > Hubs > Devices. Each device contains data points.
- 9. Click the Cancel button or simple navigate out of the screen without clicking the Save button to discard changes OR
- 10. Click the Save button to save changes.

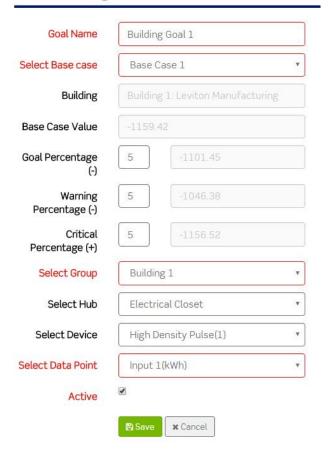
Executive Reporting Module: Executive Reporting Building Goals > Edit

1. Click the Edit link in the row of the goal located in the Actions column on the building goal list screen or simply click the name of the goal.



The Edit Building Goal screen is displayed.

Edit Building Goal



From this screen you can:

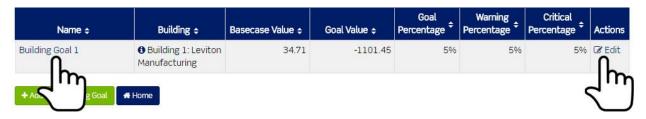
- a. Edit the Goal Name.
- b. Change the selected Base case.
 - i. Selected Base Case value drives the Building field and the Base Case Value field.
- c. Change the Goal Percentage.
- d. Change the Warning Percentage.
- e. Change the Critical Percentage.
- f. Change the selected group.
 - i. Groups are located in the System Network and added, edited, and removed through the base module.
- g. Change the selected hub.
 - i. Hubs are child objects to groups.
 - ii. Hubs are located below groups in the System Network and added, edited, and removed through the base module. Note: Available hub selections are based on the prior group selection.
- h. Change the selected device.
 - iii. Devices are child objects to hubs.
 - iv. Devices are located below hubs in the System Network.

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- v. As long as a device is physically connected to a hub and the hub is uploading data to the Building Manager Online 3.0, the Building Manager Online 3.0 will receive data from the hub for the device.
- Change the selected data point.
 - vi. Data Points are child objects to devices which are child objects to hubs.
 - vii. Data Points are located in the System Network under Group > Hubs > Devices. Each device contains data points.
- 2. Make the necessary edits.
- 3. Click the cancel button or simply navigate out of the screen without clicking the Save button to discard changes.
- 4. Click the Save button to save changes.

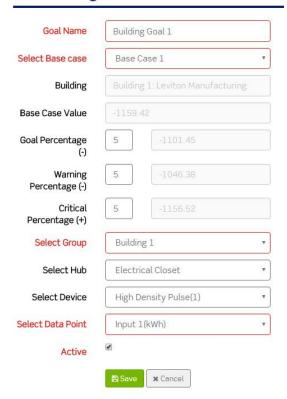
Executive Reporting Module: Executive Reporting Building Goals > Remove

1. Click the Edit link in the row of the goal located in the Actions column on the building goal list screen or simply click the name of the goal.



The Building Goal screen is displayed.

Edit Building Goal



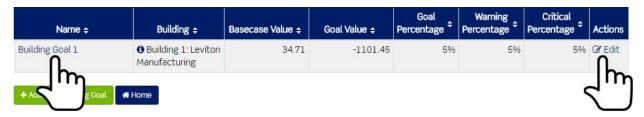
2. Click the Active checkbox to remove the goal from the building goal list screen.

Alert active

- 3. When the checkbox is empty (doesn't contain a check) and the screen has been saved, the goal will no longer appear in the building goal list screen and you will not be able to access the goal from other areas of the Building Manager Online 3.0.
- 4. Click the Cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

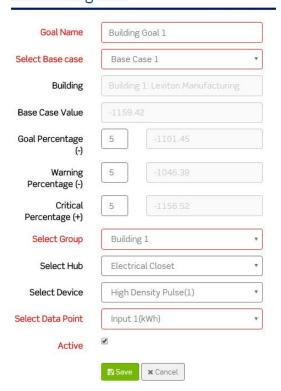
Executive Reporting Module: Executive Reporting Building Goals > Adding a Removed Goal

1. To add a removed goal, click the Edit link in the row of the base case located in the Actions column on the building goal list screen or simply click the name of the goal.



2. The Building Goal screen is displayed.

Edit Building Goal



3. Click the Active checkbox to add the goal back to the building goal list screen.

Alert active

- 4. Click the Cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

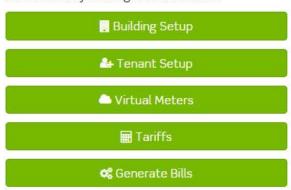
Tenant Billing Module:

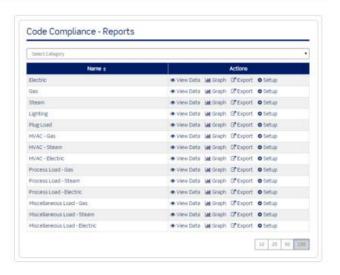
The tenant billing module allows for meter reading and invoice creation for tenants in any commercial or residential multi-unit building.

Tenant Billing Module

This module is designed to allow multi-unit property operators to collect meter data and invoice tenants for their utility usage.

Get started by clicking on a link below:





- The Tenant Billing module is an expansion module and must be purchased.
- If you are interested in purchasing the Tenant Billing module, see Modules Menu > Purchase Modules.



1. If purchased, click Modules > click Tenant Billing.



The Tenant Billing module is displayed. The Tenant Billing module contains five menu items:

- a. Building Setup.
- b. Tenant Setup.
- c. Virtual Meters.
- d. Tariffs.
- e. Generate Bills.



Tenant Billing Module: Building Setup

1. Click the Building Setup button.



The Buildings list screen is displayed.

Buildings



Your module license(s) allows for a total of 10 buildings. Currently, there are a total of 3 active and inactive buildings.

☐ Show Inactive

Name ÷	Address ÷	City ¢	State ¢	Zip Code ‡	Actions
Leviton Mfg	20497 SW Teton Ave.	Portland	OR	97201	☑ Edit Units
Leviton Mrg	20497 SW Teton Ave.	Portland	OR	97201	⊌ Edit Units



The Buildings list screen displays a map pinpointing the location for each building added to the Building Manager Online 3.0 and contains a table listing all buildings added to the Building Manager Online 3.0.

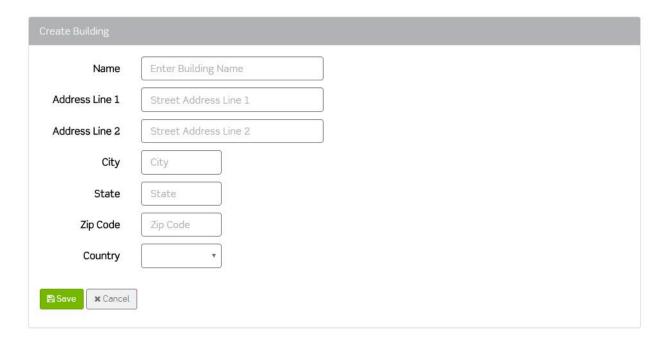
Tenant Billing Module: Building Setup > Add New Building

1. Click the Add New Building button.



The Add Building screen is displayed.

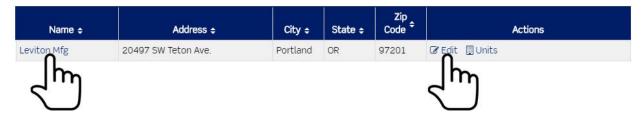
Add Building



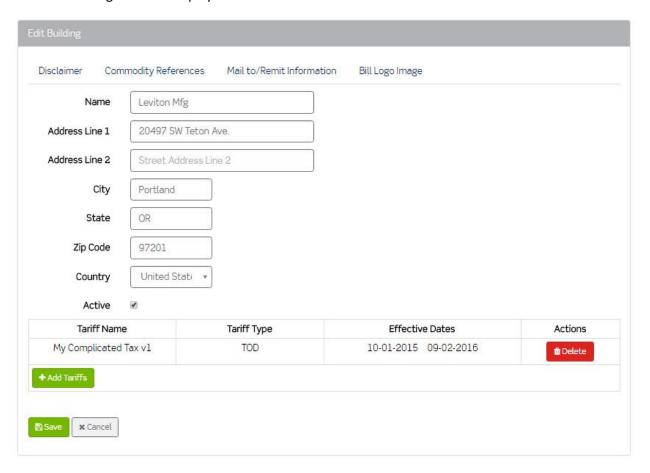
- 2. Enter building attributes.
 - a. Name of the Building
 - b. Address Line 1
 - c. Address Line 2 (optional)
 - d. City
 - e. State
 - f. Zip Code
 - g. Country
- 3. Click the Cancel button to discard changes OR
- 4. Click the Save button to add the building to the Buildings list screen.

Tenant Billing Module: Building Setup > Edit Building

1. Click the Edit link in the row of the building located in the Actions column on the Buildings list screen or simply click the name of the building.



The Edit Building screen is displayed.



Note: Using the Building Edit Option unlocks the following screen functionality:

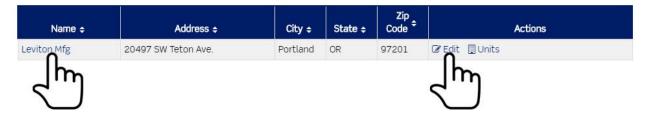
- a. Disclaimer (user may create a disclaimer relevant to their particular corporation, such as disclaimer related to tenant bills, utility prices, etc.)
- b. Commodity References (may refer to gas usage in CCFs, etc.)
- c. Mail to/Remit Information (address that tenant sends bill payment back to)
- d. Bill Logo Image (customizable area to include company's logo image on bill)
- e. The Ability to add Tariffs (a rate structure used for billing energy to end users. Tenant Billing Module allows for the creation of tariff as desired by end user; formats offered

are simple tiered tariff and TOU tariff.)

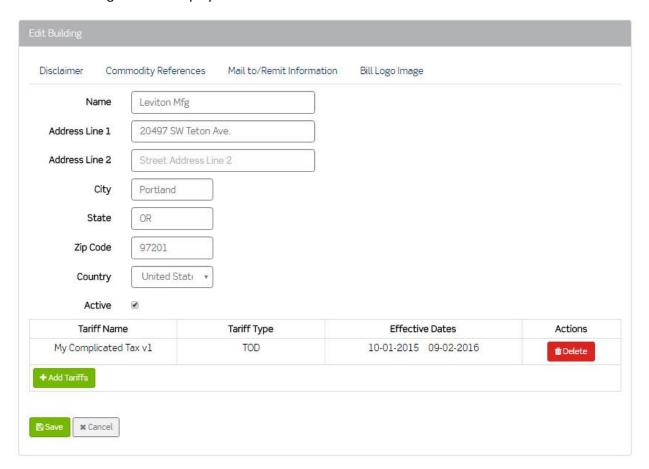
- 2. Click the field to be modified.
- 3. Enter changes.
- 4. Click the Cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

Tenant Billing Module: Building Setup > Remove Building

1. Click the Edit link in the row of the building located in the Actions column on the Buildings list screen or simply click the name of the building.



The Edit Building screen is displayed.



2. Click the Active checkbox to remove the building from the Buildings list screen.

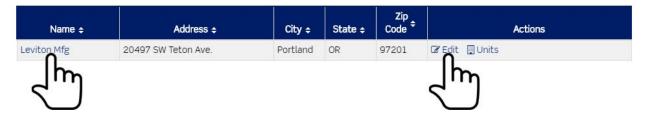
Active



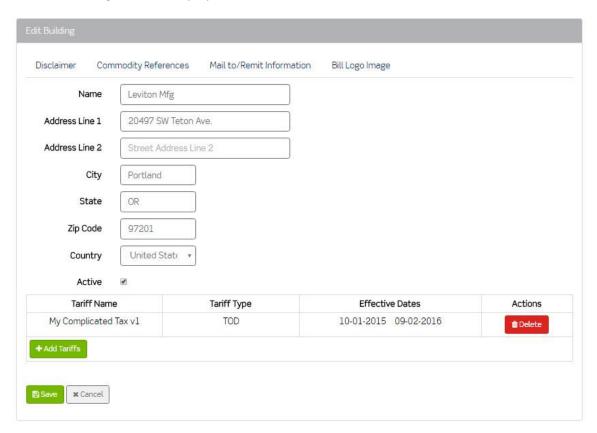
- 3. When the checkbox is empty (doesn't contain a check) and the screen has been saved, the building will no longer appear in the Buildings list screen and you will not be able to access the building from other areas of the Building Manager Online 3.0.
- 4. Click the Cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

Tenant Billing Module: Building Setup > Adding a Removed Building

1. To add a removed building, click the Edit link in the row of the building located in the Actions column on the Buildings list screen or simply click on the name of the building.



The Edit Building screen is displayed.



2. Click the Active checkbox to add the building back to the Buildings list screen.

Active



- 3. Click the Cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 4. Click the Save button to save changes.

Tenant Billing Module: Building Setup > Units

1. Click the Units link in the row of the building located in the Actions column on the Buildings list screen.

Name ¢	Address ÷	City ¢	State ÷	Zip Code ‡	Actions
Leviton Mfg	20497 SW Teton Ave.	Portland	OR	97201	☑ Edit 및 Units

The List of Building Units screen is displayed.

List of Building Units

Building name: Leviton Mfg

Building address: 20497 SW Teton Ave.

City, state, zip: Portland, OR, 97201

☐ Show Inactive Units

Unit# -	Description	Actions
1	This is the first unit.	🕼 Edit 🛮 🚳 Assign Meter
2	This is the second unit.	🕜 Edit 🛮 🚳 Assign Meter
3	This is the third unit.	☑ Edit 🌇 Assign Meter

2. The List of Building Units screen displays the name of the building, the address of the building, and a table containing all units added to the building.

Tenant Billing Module: Building Setup > Units > Add

1. Click the Add Unit button.



The Add a Building Unit screen is displayed.

Add a Building Unit

Building name:	Leviton Mfg
Building address:	20497 SW Teton Ave.
City, state, zip:	Portland, OR, 97201
Unit Number:* Description:	
Active	✓
< Back to Units	≅ Save

The Add a Building Unit screen displays the name of the building and the address of the building.

- 2. Enter the Unit Number.
- 3. Enter a Description for the Unit (optional).
- 4. Click the Back to Units button or simply navigate out of the screen without clicking the Save button to discard changes.
- 5. Click the Save button to save changes.

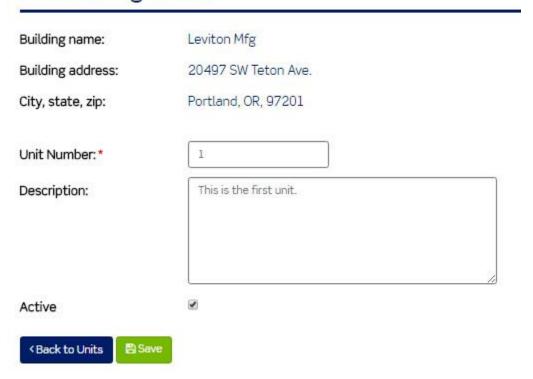
Tenant Billing Module: Building Setup > Units > Edit

1. Click the Edit link in the row of the unit # located in the Actions column on the List of Building Units screen.



The Edit Building screen is displayed.

Edit Building Unit: 1



- 2. Click the field to be modified.
- 3. Enter changes.
- 4. Click the Back to Units button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

Tenant Billing Module: Building Setup > Units > Remove

1. Click the Edit link in the row of the unit # located in the Actions column on the List of Building Units screen.

Unit# -	Description	Actions
1	This is the first unit.	☑ Edit 🌇 Assign Meter
2	This is the second unit.	☑ B Assign Meter
3	This is the third unit.	Assign Meter

The Edit Building screen is displayed.

Edit Building Unit: 1 Building name: Leviton Mfg Building address: 20497 SW Teton Ave. City, state, zip: Portland, OR, 97201 Unit Number:* Description: This is the first unit. Active < Back to Units Save

2. Click the Active checkbox to remove the unit from the List of Building Units screen.





- 3. When the checkbox is empty (doesn't contain a check) and the screen has been saved, the building will no longer appear in the List of Building Units screen and you will not be able to access the unit from other areas of the Building Manager Online 3.0.
- 4. Click the cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

Tenant Billing Module: Building Setup > Units > Adding a Removed Unit

1. To add a removed unit, click the Edit link in the row of the unit # located in the Actions column on the List of Building Units screen.



The Edit Building screen is displayed.

Edit Building Unit: 1 Building name: Leviton Mfg Building address: 20497 SW Teton Ave. City, state, zip: Portland, OR, 97201 Unit Number:* 1 Description: This is the first unit. Active ✓ Back to Units Seve

2. Click the Active checkbox to add the unit back to the List of Building Units screen.

Active



- 3. Click the cancel button or simply navigate out of the screen without clicking/pressing the Save button to discard changes OR
- 4. Click the Save button to save changes.

Tenant Billing Module: Building Setup > Units > Assign Meter

1. Click the Assign meter link in the row of the unit # located in the Actions column on the List of Building Units screen.



The Meter Assigned to Unit screen is displayed.

Meters Assigned to Unit: 1

Building name: Leviton Manufacturing Building 20497 SW Teton Avenue address: City, state, zip: Tualatin, OR, 97062 Name # Utility -Group # HUB **‡** Device \$ Point \$ Percentage \$ **Actions** No results found. < Back to Units Assign ▼

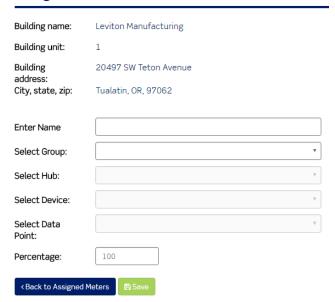
- The Meter Assigned to Unit screen displays the name of the building, the address of the building, and a table containing a list of utilities.
- This screen allows you to assign a data point (from a submeter) to a matching utility (e.g., BTU, kWh, etc.).



2. Click the Assign button and then select a utility option.

The Assign Meter screen is displayed.

Assign meter: Electric (kWh)



The Assign Meter screen displays the name of the building and the address of the building.

- 3. Enter a Name.
 - a. This will help you keep track of assignments.
- 4. Select Group.
 - a. Groups are located in the System Network and added, edited, and removed through the base module.
- 9. Select Hub.
 - a. Hubs are child objects to groups.
 - b. Hubs are located below groups in the System Network and added, edited, and removed through the base module.
 - c. Note: Available hub selections are based on the prior group selection.
- 10. Select Device.
 - a. Devices are child objects to hubs.
 - b. Devices are located below hubs in the System Network.
 - c. As long as a device is physically connected to a hub and the hub is uploading data to the Building Manager Online 3.0, the Building Manager Online 3.0 will receive data from the hub for the device.
- 11. Select Data Point.
 - a. Data Points are child objects to devices which are child objects to hubs.
 - Data Points are located in the System Network under Group > Hubs > Devices. Each
 device contains data points. Note: Available data point selections are based on the prior
 hub selection.
- 12. Enter a Percentage. (percentage of meter value assigned to the particular tenant)
- 13. Click the Back to Assigned Meters button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 14. Click the Save button to assign the meter.

Tenant Billing Module: Building Setup > Units > Edit

1. Click the Edit link in the row of the assigned meter in the Meter Assigned to Unit screen.

Meters Assigned to Unit: 1

Building name: Leviton Manufacturing

Building 20497 SW Teton Avenue
address:
City, state, zip: Tualatin, OR, 97062



The Assign Meter screen is displayed.

Assign meter: Electric (kWh) Building name: Leviton Manufacturing Building unit: Building 20497 SW Teton Avenue address: Tualatin, OR, 97062 City, state, zip: Electricity for Unit #1 **Enter Name** Select Group: MyGroup Electrical Closet Select Hub: Select Device: Main Feed Avery Building kWh from grid (kWh) Select Data Point: Percentage: < Back to Assigned Meters

- 2. Click the field to be modified.
- 3. Enter changes.
- 4. Click the Back to Assigned Meters button or simply navigate out of the screen without clicking/pressing the Save button to discard changes OR
- 5. Click the Save button to save changes.

Tenant Billing Module: Building Setup > Units > Unassign Meter

1. Click the Edit link in the row of the assigned meter in the Meter Assigned to Unit screen.

Meters Assigned to Unit: 1

Building name: Leviton Manufacturing

Building

20497 SW Teton Avenue

address:

City, state, zip: Tualatin, OR, 97062

Name ¢	Utility -	Group ¢	HUB ¢	Device ¢	Point \$	Percentage \$	Actions
Electricity for Unit #1	Electric (kWh)	MyGroup	Electrical Closet	Main Feed Avery Building	kWh from grid	100%	E dit
∢Back to Units	Assign ▼					•	/ 1114

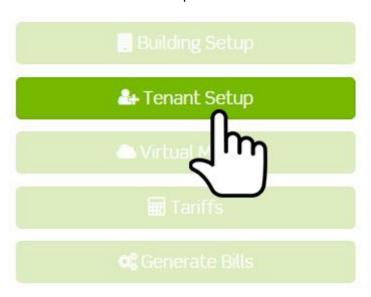
The Assign Meter screen is displayed.

- 2. Click the Back to Assigned Meters button or simply navigate out of the screen without clicking/pressing the Save button to discard changes.
- 3. Click the Unassign button.



Tenant Billing Module: Tenant Setup

1. Click the Tenant Setup button.



2. The Tenants list screen is displayed.

Tenants



- 3. The Tenants list screen displays a table containing a list of all tenants.
- 4. You can filter tenants by building.

Tenants



 Click the My Buildings button to view all available buildings. Note: You will be redirected to the Building Setup screen. You can navigate back to the Tenant Setup screen by clicking/pressing Modules > Tenant Billing > Tenant Setup.

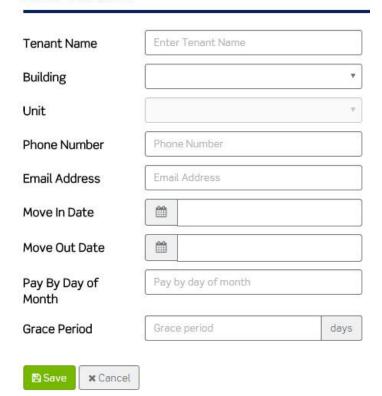
Tenant Billing Module: Tenant Setup > Add Tenants

1. Click the Add New Tenant button.



The Add Tenant screen is displayed.

Add Tenant



- 2. Enter Tenant Name.
- 3. Select a Building (buildings are populated by buildings listed under Modules > Tenant Billing > Building Setup).
- 4. Select a Unit (this selection is populated by the Units list screen under Modules > Tenant Billing > Building Setup > Building - Units).
- 5. Enter Phone Number.
- 6. Enter Email Address.
- 7. Select Move In Date.
- 8. Select Move Out Date.

- 9. Note: Move In and Move Out dates for multiple customers occupying an open unit cannot overlap.
 - a. If customer A has a move in date of 3/1/xx and a move out date of 9/30/xx, the unit cannot be selected for customer B on 4/1/xx, 5/1/xx, etc.
- 10. Select Pay By Day of Month. (date by which the bill needs to be paid to management)
- 11. Set a Grace Period. (number of days payment is permitted after the Pay By date)
- 12. Click the cancel button or simply navigate out of the screen without clicking/pressing the Save button to discard changes.
- 13. Click the Save button to save changes.

Tenant Billing Module: Tenant Setup > Edit Tenants

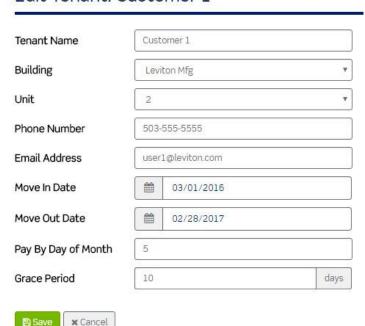
1. Click the Edit link in the row of the tenant in the Actions column on the Tenants list screen.

Tenants



The Edit Tenant screen is displayed.

Edit Tenant: Customer 1



- 2. Click the field to be modified.
- 3. Enter changes.

- 4. Click the cancel button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

Tenant Billing Module: Virtual Meters

Virtual meters allow you to add or subtract real data points to produce virtual data points. You can only create virtual meters from real data points of the same type such as kW, Degree F, etc. Only hubs with a data upload interval of 15 minutes can be used to create Virtual meters.

1. Click the Virtual Meters button.



2. The Virtual Meters list screen is displayed.



- The Virtual Meters list screen contains a table listing all virtual meters added to the Building Manager Online 3.0.
- The Virtual Meters list screen contains a table and two main navigational menu items.
- The table lists all Virtual Meters added to the Building Manager Online 3.0.
- The two navigational menu items are Add New Virtual Meter and Home.
- The Virtual Meters list screen allows you to filter your virtual meters by Building.



Tenant Billing Module: Virtual Meters > Add

1. Click the Add New Virtual Meter button.



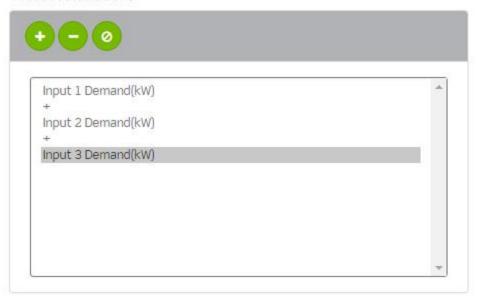
The Create Virtual Meter screen is displayed.

Create Virtual Meter Virtual meters allow you to add or subtract real data points to view your data. You can only create virtual meters from real data points of the same type Only HUBs with a data upload interval of 15 minutes can be used to create Virtual meters Process for Building Virtual Meters Step 1 Select Data Point Step 2 Select Mathematical Operator Repeat steps to continue building the virtual meter. Click the Save button when you are finished building your virtual meter. +-0 Building for Virtual Meter Select Group Select Hub Select Device

- 2. Enter Virtual Meter Label.
 - a. This will be the name of the Virtual Meter.
- 3. Select Group.
 - a. Groups are located in the System Network and added, edited, and removed through the base module.
- 4. Select Hub.
 - a. Hubs are child objects to groups.
 - b. Hubs are located below groups in the System Network and added, edited, and removed through the base module. Note: Available hub selections are dependent upon and based on the prior group selection.
- Select Device.
 - a. Devices are child objects to hubs.
 - b. Devices are located below hubs in the System Network.
 - c. As long as a device is physically connected to a hub and the hub is uploading data to the Building Manager Online 3.0, the Building Manager Online 3.0 will receive data from the hub for the device.
- 6. Select Data Point.
 - a. Data Points are child objects to devices which are child objects to hubs.
 - b. Data Points are located in the System Network under Group > Hubs > Devices. Each device contains data points. Note: Available data point selections are based on the prior hub selection.

The selected data point will display in the Virtual Calculations definition/formula box.

Virtual Calculations



The selected data point will also display below the Virtual Data Point Definition heading.

Virtual Data Point Definition

Input 1 Demand(kW) • Input 2 Demand(kW) • Input 3 Demand(kW) Active 🗹

Note: A virtual meter equation is also known as a virtual meter definition.

- 7. Click the appropriate mathematical operator.
 - a. Plus sign (+)
 - i. The plus sign (+) will add the selected data point value to the next data point value.

Virtual Calculations



- b. Subtraction sign (-)
 - i. The subtraction sign (-) will subtract the next data point value from the selected data point value.

Virtual Calculations



- 8. Clear button (Ø).
 - a. Click the clear button to remove elements from a Virtual Calculations definition. Note: The clear button will only remove a data point or operator at the end of a definition/equation.
 - b. Click the last data point or operator in the definition/equation.
 - c. Click the clear button.

Virtual Calculations



9. Click the data point dropdown and click the next data point. Note: The data point dropdown field is used for selecting the initial data point and each additional data point.



- 10. Repeat adding data points and mathematical operators until the definition is complete.
 - a. Process for Building Virtual Meters:
 - i. Step 1 Select Data Point.
 - ii. Step 2 Select Mathematical Operator.
 - iii. Step 3 Select Data Point.

Note: Virtual Meters must be of the same type (e.g., kW, Degree F, etc.).

Also note: Like data points can be added and subtracted from different groups, hubs, and virtual meters.

- b. Process for Building Virtual Meters using multiple hubs:
 - i. Step 1 Select Data Point
 - ii. Step 2 Select Mathematical Operator
 - iii. Step 3 Select Group
 - iv. Step 4 Select Hub
 - v. Step 5 Select Data Point
- 11. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking/pressing the Save button to discard changes.
- 12. Click the Reset Selections button to clear the screen and start over.
- 13. Click the Save button to save the virtual meter. The Virtual Meters list screen is displayed and the newly created virtual meter is listed.

Virtual Meters



Tenant Billing Module: Virtual Meters > Edit

1. Click the Edit link in the row of the virtual meter located in the Actions column on the Virtual Meters list screen or simply click the name of the virtual meter.





The Edit Virtual Meter screen is displayed.

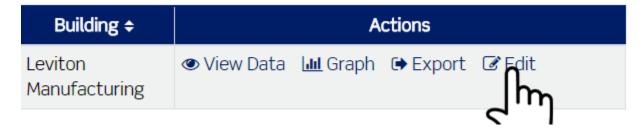
Edit Virtual Meter Virtual meters allow you to add or subtract real data points to view your data. You can only create virtual meters from real data points of the same type Only HUBs with a data upload interval of 15 minutes can be used to create Virtual meters. Process for Building Virtual Meters: Step 1 Select Data Point Step 2 Select Mathematical Operator Step 3 Select Data Point Repeat steps to continue building the virtual meter. Click the Save button when you are finished building your virtual meter Virtual Calculations Virtual Meter Number 1 Building for Virtual Meter Leviton Manufacturing 20497 SW Teton Avenue, Tualatin Ol Select Group Phase C Real Power(kW) 001EC6001BB0-3 Select Hub Select Device Select Data Point Virtual Data Point Definition Hvac Loads Demand(kW) 001EC6001BB0-1 ♥ Phase A Real Power(kW) 001EC6001BB0-3 ♥ Phase C Real Power(kW) 001EC6001BB0-3

From this screen you can:

- a. Change the label (name) of the meter.
- b. Select additional groups.
- c. Select additional hubs (must first select the group).
- d. Select additional data points (must first select the hub).
- e. Add and remove data points and operators to and from the Virtual Data Point Definition.
- 2. Make the necessary edits.
- 3. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking/pressing the Save button to discard changes.
- 4. Click the Reset Selections button to clear the screen and start over.
- 5. Click the Save button to save changes.

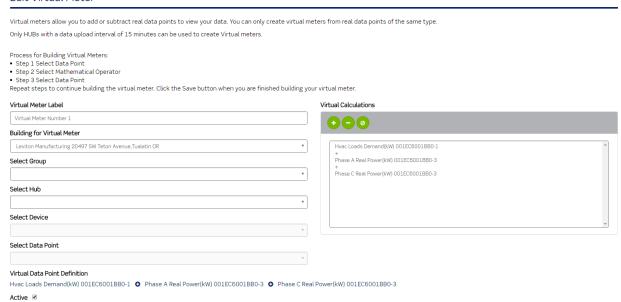
Tenant Billing Module: Virtual Meters > Remove

1. Click the Edit link in the row of the virtual meter located in the Actions column on the Virtual Meters list screen or simply click the name of the virtual meter.



The Edit Virtual Meter screen is displayed.

Edit Virtual Meter



2. Click the Active checkbox to remove the virtual meter from the virtual meter list screen.



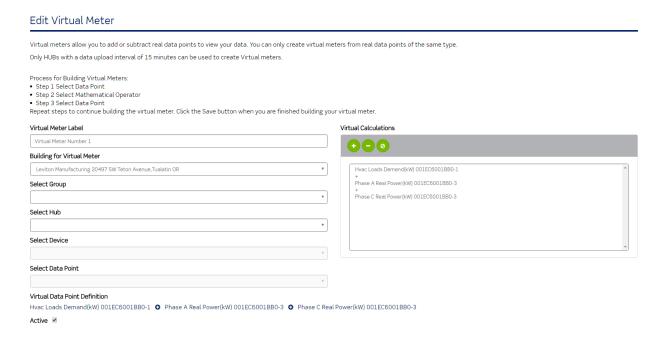
- 3. When the checkbox is empty (doesn't contain a check) and the screen has been saved, the virtual meter will no longer appear in the virtual meter list screen and you will not be able to access the virtual meter from other areas of the Building Manager Online 3.0.
- 4. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 5. Click the Save button to save changes.

Tenant Billing Module: Virtual Meters > Adding a Removed Virtual Meter

1. To add a removed virtual meter, click the Edit link in the row of the virtual meter located in the Actions column on the virtual meter list screen or simply click the name of the virtual meter.



The Edit Virtual Meter screen is displayed.



2. Click the Active checkbox to add the virtual meter back to the virtual meters list screen.

Active



- 3. Click the Back to Virtual Meters button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 4. Click the Save button to activate the virtual meter.

Tenant Billing Module: Virtual Meters > View Data

1. Click the View Data link in the Actions column of the virtual meter list screen.



The view data screen is displayed.



- The view data screen displays the name of the virtual meter, the definition (equation) used to calculate the virtual data points.
- The view data screen displays three menu items:



- The first menu item is view data.
- This is the default view for a virtual meter.
- The view data screen displays a table containing all data and virtual data points for the selected date range.
- 2. Select a range of data by clicking/pressing the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking/pressing the time zone dropdown.
- 7. Select the time zone.
- 8. Click the Update Table Data button.

C Update Table Data

The data table will refresh based on the selections.

9. Scroll down to the bottom of the screen to page through data.



10. Click the Update Table Data button to populate the table with data whenever the date range or time zone is changed.



Tenant Billing Module: Virtual Meters > Graph

1. Click the Graph link in the virtual meters list screen under the Actions column.



Graph is the second menu items.



The graph screen displays the name of the virtual meter and the definition (equation) used to calculate the virtual data points.

Virtual Meter Definition:

Select the Date Range

2.5 2.25

1.75

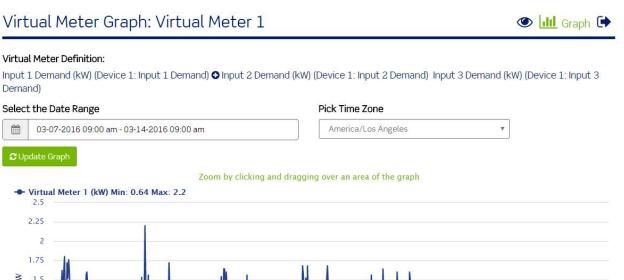
1.25

0.75

Virtual Meter Graph: Virtual Meter 1

03-07-2016 09:00 am - 03-14-2016 09:00 am

- Virtual Meter 1 (kW) Min: 0.64 Max: 2.2



- A default date range is selected and a default graph is rendered.
- The graph screen allows you to set a date range and select a time zone.

Pick Time Zone America/Los Angeles

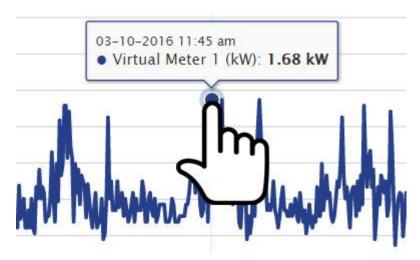
Zoom by clicking and dragging over an area of the graph

- 2. Select a range of data by clicking/pressing the date range picker.
- 3. Select a start date.
- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking/pressing the time zone dropdown.
- 7. Select the time zone.
- 8. Click the Update Graph button.



The graph is rendered.

9. Hover over the data points to view detailed information for each input.



10. Hover over the graph and click and then drag and release to zoom in.



11. Press the Reset zoom button to reset the zoom on the graph.



12. Click the Update Graph button to render the graph whenever the date range or time zones are changed.



Tenant Billing Module: Virtual Meters > Export

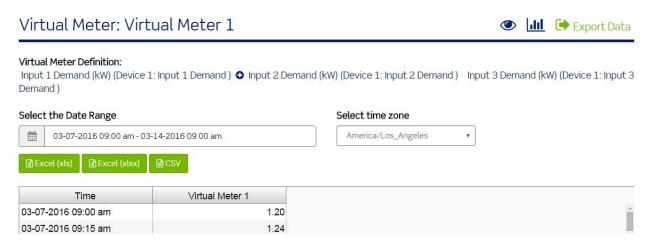
1. Click the Export link located in the virtual meters list screen under the Actions column.



Export Data is the third menu item.

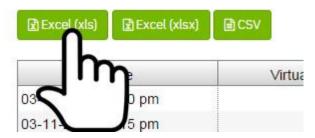


The Export Data screen is displayed.



- The export data screen displays the name of the virtual meter and the definition (equation) used to calculate the virtual data points.
- The export data screen allows you to select a date range and time zone and then export the data to a text file.
- 2. Select a range of data by clicking/pressing the date range picker.
- 3. Select a start date.

- 4. Select an end date.
- 5. Click the Apply button.
- 6. Select the time zone by clicking/pressing the time zone dropdown.
- 7. Select the time zone.
- 8. Click the Excel (xls) button to export the data in an xls file format OR



- 9. Click the Excel (xlsx) button to export the data in an xlsx file format OR
- 10. Click the CSV button to export the data in a comma separated values file format OR

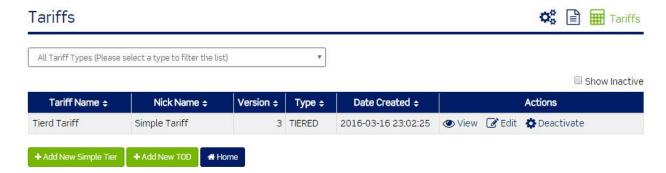
The file will download. If the file does not appear to download, make sure the popup blocker in your web browser is not blocking the file.

Tenant Billing Module: Tariffs

1. Click the Tariffs button.



The Tariffs list screen is displayed.



The Tariffs list screen contains 3 menu items and a table containing a list of all tariffs. The first menu item is Generate Bills. This is a shortcut to the Generate Bills section.



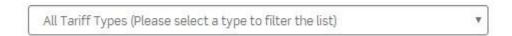
The second menu item is Tenant Reports. This is a shortcut to the Tenant Reports section.



The third menu item is tariffs. This is the default screen.



Click the All Tariff Types dropdown and click Simple/Tiered or Time of Day (TOD) to filter the list of tariffs.



Tenant Billing Module: Tariffs > Add Simple Tier

1. Click the Add New Simple Tier button.

+ Add New Simple Tier

- 2. Tariff Identify. Enter Tariff Details. Traiff names make it easier for users to activate and deactivate tariffs as required.
 - a. Enter Tariff Name.
 - b. Enter Tariff Nick Name.
 - c. Note: The screen will display the Tariff Version number.
 - d. Click the Cancel button to discard changes.
 - e. Click Continue to proceed to the next step.
- 3. Energy Usage. Create tiers for energy usage charge calculations. Set a start value, end value, and rate for each tier. The last tier should have a start value, infinity as an end value, and a rate. Tiered tariffs allow for different costs at certain levels of usage (for example 0-100 kWh may be 5 cents per kWh, while 101-200 kWh may be 7 cents, etc.).
 - a. Enter End Value (kWh value defined by utility for the end user to pull data from master utility bill).
 - b. Enter Rate.
 - c. Click the Add Tier button to add another tier.
 - d. Enter End Value. (allowing you to add as many values as the utility requires)
 - e. Enter Rate.
 - f. Repeat adding end values and rates to add tiers.
 - g. Click the minus sign (-) to remove tiers.
 - h. Click the Back button to return to the previous step.
 - i. Click the Cancel button to discard changes and exit the tariff setup process.
 - j. When finished adding tiers, click the Continue button to proceed to the next step. Note: In order to click the Continue button and proceed to the next step the end value for the last tier must be set to the default value of Infinity.
- 4. Peak Demand Charges. Create tiers for peak demand charge calculations. Set a start value, end value, and rate for each tier. The last tier should have a start value, infinity as an end value, and a rate. This allows the end user to charge certain amounts for demand per kWh based on the stepped demand approach.
 - a. Enter End Value. (define what this is and what the format of the value is/are there any rules)
 - b. Enter Rate.
 - c. Click the Add Tier button to add another tier.
 - d. Enter End Value. (define what this is and why the user has to enter another tier/are there any rules)
 - e. Enter Rate.
 - f. Repeat adding end values and rates to add tiers.
 - g. Click the minus sign (-) to remove tiers.
 - h. Click the Back button to return to the previous step.
 - i. Click the Cancel button to discard changes and exit the tariff setup process.

- j. When finished adding tiers, click the Continue button to proceed to the next step. Note: In order to click the Continue button and proceed to the next step the end value for the last tier must be set to the default value of Infinity.
- 5. **Other Utility Charges (Optional)**. Setup charges for up to 4 other utilities below. Set a charge name, choose a utility, and set a rate. Each utility can only be used once. Other utilities may include gas, water, etc.
 - a. Click the Add Utility Charges button.
 - b. Enter a Charge Name (such as "Water Charges").
 - c. Select a Utility (water, gas, etc.).
 - d. Enter a Rate.
 - e. Repeat steps to add other utility charges.
 - f. Click the minus sign (-) to remove rows.
 - g. Click the Back button to return to the previous step.
 - h. Click the Cancel button to discard changes and exit the tariff setup process.
 - i. Click the Continue button to proceed to the next step.
- 6. **Custom Charges (Optional)**. Define up to 10 custom charges below. Set the charge type, quantity (if applicable) and rate. These custom charges could be taxes, distribution charges, or other custom fees as defined by the user.
 - a. Click the Add Custom Charges button.
 - b. Enter a Charge Name (such as "Tax").
 - c. Select a Charge Type (such as "New York Excise Tax").
 - d. Select a Quantity (if applicable) (can be percentage of bill or fixed amount).
 - e. Enter a Rate.
 - f. Repeat steps to add other custom charges.
 - g. Click the minus sign (-) to remove tiers.
 - h. Click the Back button to return to the previous step.
 - i. Click the Cancel button to discard changes and exit the tariff setup process.
 - j. Click the Continue button to proceed to the next step.
- 7. Save the Tariff.
 - a. Click the Back button to return to the previous step.
 - b. Click the Cancel button to discard changes and exit the tariff setup process.
 - c. Click the Save button to complete the setup.

Tenant Billing Module: Tariffs > Add TOD

1. Click the Add New TOD button.



- 2. **Tariff Identify.** Enter Tariff Details. Select something easy to remember and intuitive to the tariff, such as "Summer Tarriff."
 - a. Enter Tariff Name.
 - b. Enter Tariff Nick Name.
 - c. Note: The screen will display the Tariff Version number.

- d. Select a date range by clicking/pressing the date range picker.
- e. Click a start date.
- f. Click an end date.
- g. Click the Apply button.
- h. Click the Cancel button to discard changes and exit the tariff setup process.
- i. Click Continue to proceed to the next step.
- 3. **TOD kWh Usage.** Define date range tiers for this tariff. Time-of-use tariffs charge different rates for different times of the day that power is used.
 - a. Select Period Name
 - i. On-Peak (time as defined by utility when usage is at its most high).
 - ii. Mid-Peak (time as defined by utility when usage is in its mid-range).
 - iii. Off-Peak (time as defined by utility when usage is at its lowest).
 - b. Select a date range by clicking/pressing the date range picker.
 - i. Click a start date.
 - ii. Click an end date.
 - iii. Click the Apply button.
 - c. Select Start Day as defined by utility.
 - 1. Monday
 - 2. Tuesday
 - 3. Wednesday
 - 4. Thursday
 - 5. Friday
 - 6. Saturday
 - 7. Sunday
 - d. Select End Day.
 - 1. Monday
 - 2. Tuesday
 - 3. Wednesday
 - 4. Thursday
 - 5. Friday
 - 6. Saturday
 - 7. Sunday
 - e. Select Start Time.
 - f. Select End Time.
 - g. Enter Rate.
 - h. Click the Add Tier button to create rows.
 - i. Repeat steps when adding rows.
 - j. Click the minus sign (-) to remove rows.
 - k. Click the Cancel button to discard changes and exit the tariff setup process.
 - I. Note: The Step 1 tariff date range must be completely covered in order to move on to step 3. All time must be accounted for.
 - i. For example:
 - 1. Step 1 date range is set for January to December.

- 2. Define Tier 1 period, date range, start day, end day, start time, end time, and rate to cover January through March.
- 3. Define Tier 2 period, date range, start day, end day, start time, end time, and rate to cover June through December.
- 4. This is not complete because April and May are not accounted for.
- m. Click the minus sign (-) to remove rows.
- n. Click the Back button to return to the previous step.
- o. Click Continue to proceed to the next step.
- 4. **TOD kW Usage.** Select a period, and set a rate for demand charge calculations. Each period can only be used once. This time is set by the utility.
 - a. Select Period Name.
 - b. Enter Rate.
 - c. Click the Add Tier button to add Tiers.
 - d. Click the minus sign (-) to remove rows.
 - e. Click the Back button to return to the previous step.
 - f. Click the Continue button to proceed to the next step.
- 5. **Peak Demand Charges.** Create tiers for peak demand charge calculations. Set a start value, end value, and rate for each tier. The last tier should have a start value, infinity as an end value, and a rate. This time is set by the utility.
 - a. Enter End Value.
 - b. Enter Rate.
 - c. Click the Add Tier button to add Tiers.
 - d. Click the Back button to return to the previous step.
 - e. Click the Continue button to proceed to the next step.
- 6. **Other Utility Charges (Optional).** Setup charges for up to 4 other utilities below. Set a charge name, choose a utility, and set a rate. Each utility can only be used once.
 - a. To add utility charges, click the Add Utility Charges button.
 - b. Enter Charge Name.
 - c. Select Utility.
 - d. Enter Rate.
 - e. Click the minus sign (-) to remove rows.
 - f. Click the Back button to return to the previous step.
 - g. Click the Continue button to proceed to the next step.
- 7. **Custom Charges (Optional).** Define up to 10 custom charges below. Set the charge type, quantity (if applicable) and rate.
 - a. To add custom charges, click the Add Custom Charge button.
 - b. Select the Charge Type.
 - i. Fixed
 - ii. Percentage
 - iii. Per/Day * Requires a Quantity to be selected.
 - c. Select Quantity where applicable.
 - d. Enter Rate.
 - e. Click the Add Custom Charge button to add additional charges.
 - f. Click the minus sign (-) to remove rows.

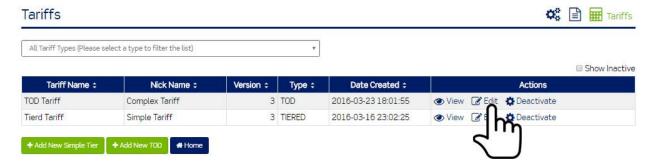
- g. Click the Back button to return to the previous step.
- h. Click the Continue button to proceed to the next step.
- 8. Holidays (Optional). Select Holidays. On these days, off peak charges will apply for the whole day. Custom Holidays can also be added below. Holidays defined outside the range of the tariff will not be taken into account when the bill is generated.
 - a. Click the checkbox to select the holiday.
 - b. Click the Add Custom Holidays button to add custom holidays.
 - i. Enter a name for the holiday.
 - ii. Select a date for the holiday.
 - iii. Click the Add Custom Holidays button to add another custom holiday.
 - c. Click the Back button to return to the previous step.
 - d. Click the Continue button to proceed to the next step.

9. Save the Tariff.

- a. Click the Back button to return to the previous step.
- b. Click the Cancel button or simply navigate out of the screen without clicking/pressing the Save button to discard changes.
- c. Click the Save button to save the TOD tariff.

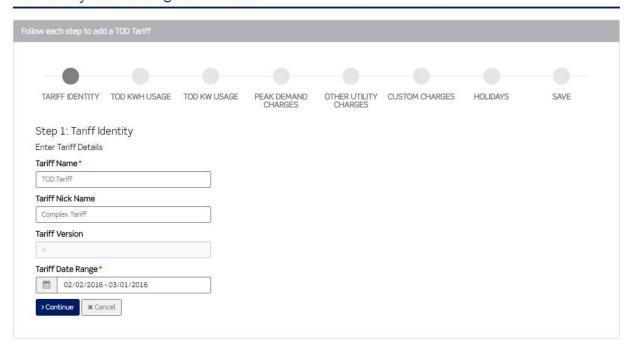
Tenant Billing Module: Tariffs > Edit

1. Click the Edit link in the row of the tariff name located in the Actions column on the Tariffs list screen.



Step 1 of the tariff is displayed.

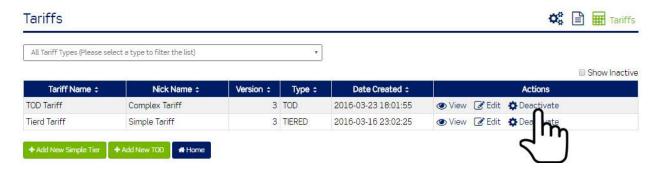
Time Of Day Tariff Settings for TOD Tariff



- 2. Click the Continue button to proceed through steps.
- 3. Make the necessary edits.
- 4. Click the Back button to return to previous steps.
- 6. Click the cancel button or simply navigate out of the screen without clicking/pressing the Save button to discard changes.
- 7. Click the Save button to save changes.

Tenant Billing Module: Tariffs > Deactivate

1. Click the Deactivate link in the row of the tariff name located in the Actions column on the Tariffs list screen.



A confirmation message is displayed.



- 2. Click the cancel button to cancel OR
- 3. Click the OK button to proceed.

Note: The tariff will not be accessible from other areas of the Building Manager Online 3.0.

Tenant Billing Module: Tariffs > Activating a Deactivated Tariff

1. Click the Show Inactive checkbox.



- 2. Locate the Tariff.
- 3. Click the Activate link in the row of the tariff name located in the Actions column on the Tariffs list screen.

Show Inactive Version : Type : Date Created # Active # Actions ◆ View

✓ Edit

Activate

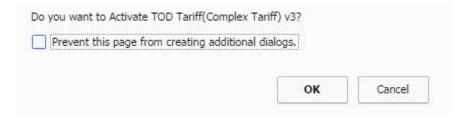
Activate

Output

Description

Output 3 TOD 2016-03-23 18:01:55 No 2016-02-04 11:34:54 View & Edit 2 TOD No 2016-02-02 20:22:15 2 TOD No View & Edit

4. A confirmation message is displayed.



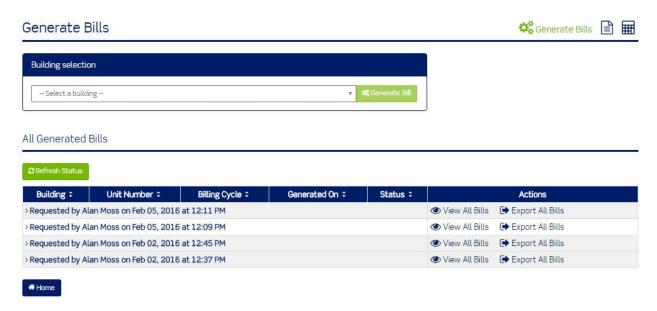
- 5. Click the Cancel button to cancel OR
- 6. Click the OK button to proceed.
- 7. The tariff will once again be accessible from other areas of the Building Manager Online 3.0.

Tenant Billing Module: Generate Bills

1. Click the Generate Bills button.



The Generate Bills screen is displayed.



The Generate Bills screen contains three menu items:



204 | Page

The Generate Bills screen is the first menu item and the default view.

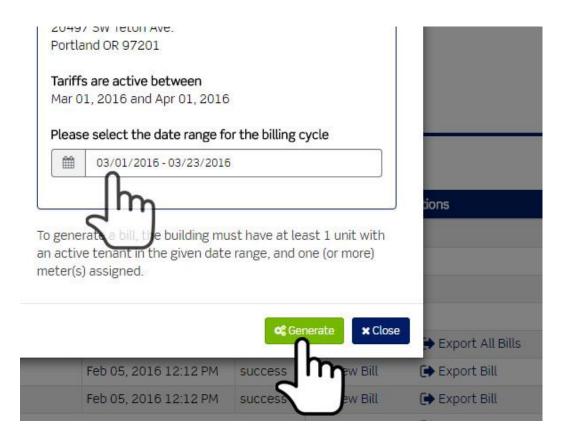
To generate a bill:

- 1. Select a building
- 2. Click the Generate Bill button. Warning messages are displayed on screen. If you cannot click the Generate Bill button, the warning message will direct the user to the corrective action.

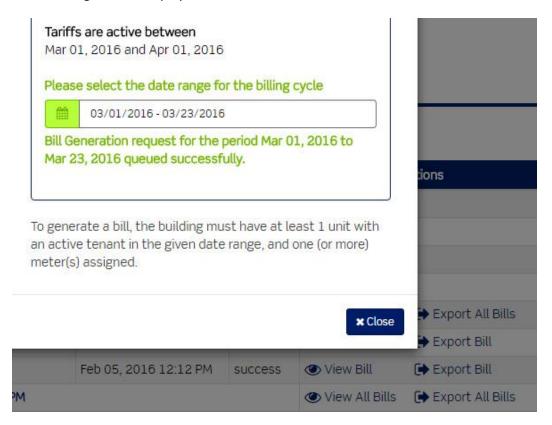
Generate Bills



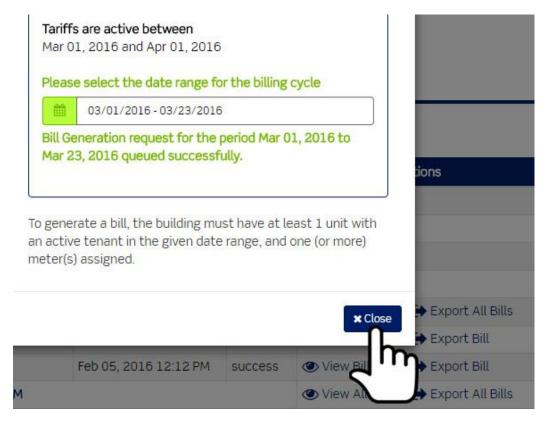
- a. Select the data range for the billing cycle.
- b. Click the Generate button.



Confirmation message will be displayed.



c. Click the Close button.



The Bill will display as queued.

Billing Cycle \$	Generated On \$	Status ÷	Actions
4, 2016 at 04:22 PM			
r 01, 2016 - Mar 23, 2016		queued	
r 01, 2016 - Mar 23, 2016		qu Pd	
r 01, 2016 - Mar 23, 2016		4,,,J	

d. Click the Refresh Status button to see if the bill has finished processing.



When the bill has finished processing, the Status column will display "Success."

Billing Cycle \$	Generated On ÷	Status +	A	ctions
ar 24, 2016 at 04:22 PM			● View All Bills	(→ Exp
Mar 01, 2016 - Mar 23, 2016	Mar 24, 2016 04:24 PM	success	◆ View Bill	(→ Exp
Mar 01, 2016 - Mar 23, 2016	Mar 24, 2016 04:24 PM	suc	● View Bill	€ Exp
Mar 01, 2016 - Mar 23, 2016	Mar 24, 2016 04:24 PM	۲'''	View Bill	(→ Exp

e. Bill export options are displayed in the Actions column. Bills can be exported as .PDF files individually or as a portfolio of all bill generated for that building.

ng Cycle ¢	Generated On ¢	Status \$	A	ctions
at 04:22 PM		◆ View All Bills	(→ Export All Bills	
16 - Mar 23, 2016	Mar 24, 2016 04:24 PM	success	● View B	€ Export Bill
16 - Mar 23, 2016	Mar 24, 2016 04:24 PM	success	◆ Vie	€ Export Bill
L6 - Mar 23, 2016	Mar 24, 2016 04:24 PM	success	◆ View Bl	€ Export Bill

Reports is the second menu item. This is a shortcut to the Tenants Report screen.



- 2. Click the Tenant Reports menu item.
 - a. The Tenant Reports screen is displayed. A list of summary management reports are useful to managers administering tenant billing programs. Reports summarize tenant, utility information, tenant usage and costs.

Tenant Reports







Name	Actions
Tenant Identification Information	View Data
Energy Usage Data for each Energy Commodity Billed	View Data
Rate Information for each Energy Commodity Billed	View Data
Total Cost for each Energy Commodity Billed	View Data
Costs for Custom Charges	View Data
Total Costs for All Fields	View Data
Total Utility Costs	View Data



b. Click the View Data link in the Actions column to view each report type.

Tariffs is the third menu item. This is a shortcut to the Tariffs screen.



Owning multiple modules

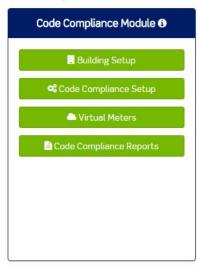
Building Manager Online 3.0 functionality is updated when an expansion module is unlocked.

Changes include:

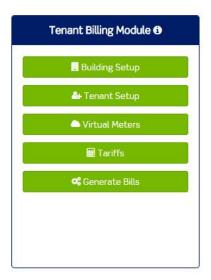
- An updated Building Manager Online 3.0 home screen Dashboard.
- Purchased modules are added to the dashboard.
- New Menu Items.
- Enhanced screen functionality.

Building Manager Online Home

Module Quick Access







Alarms at a Glance

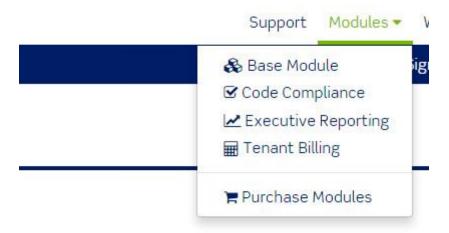






> Go to Alarm Summary

Purchased modules are added to the Modules menu.



All purchased module functions are added to the Wizards menu.

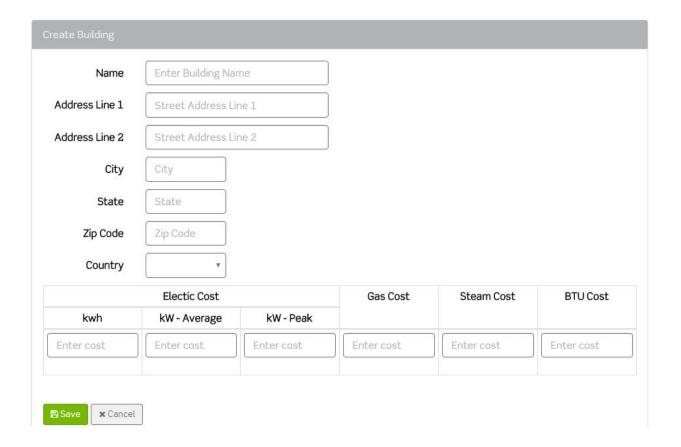


- Shared functions such as Virtual Meters or Buildings are combined as singular menu items.
- Combined functions will display functionality reflecting all functions.

Example:

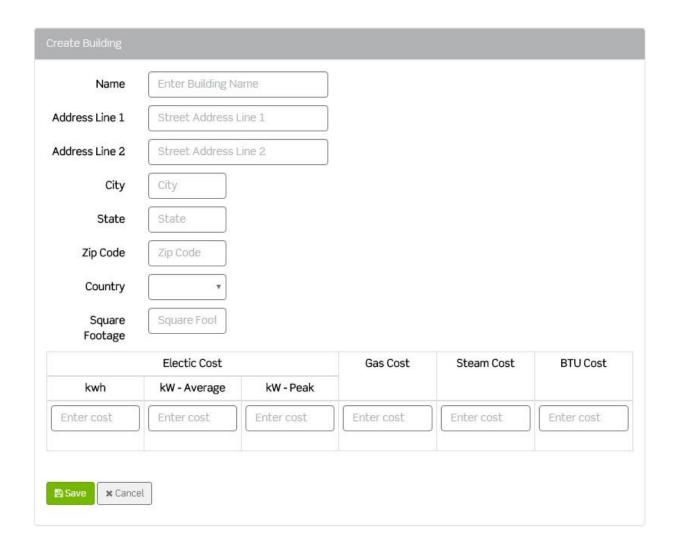
Building Setup for Code Compliance Module

Add Building



Building Setup for Executive Reporting Module (Square Footage field is added)

Add Building

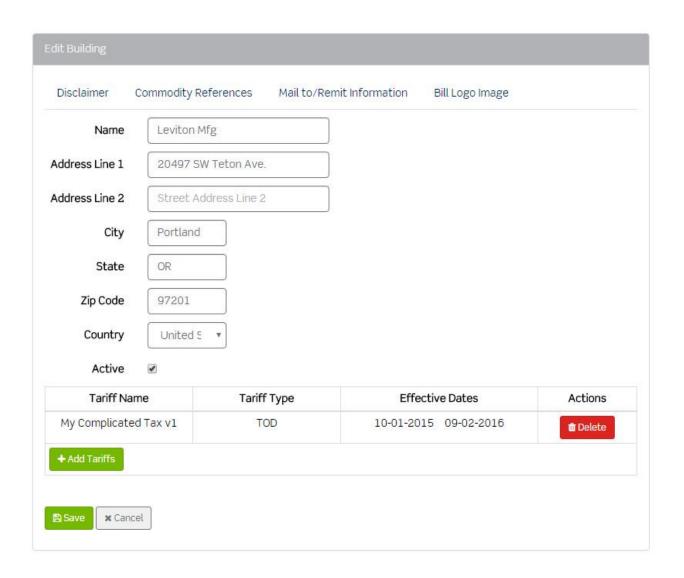


Building Setup for Tenant Billing Module

Note: Using the Building Edit Option unlocks screen functionality:

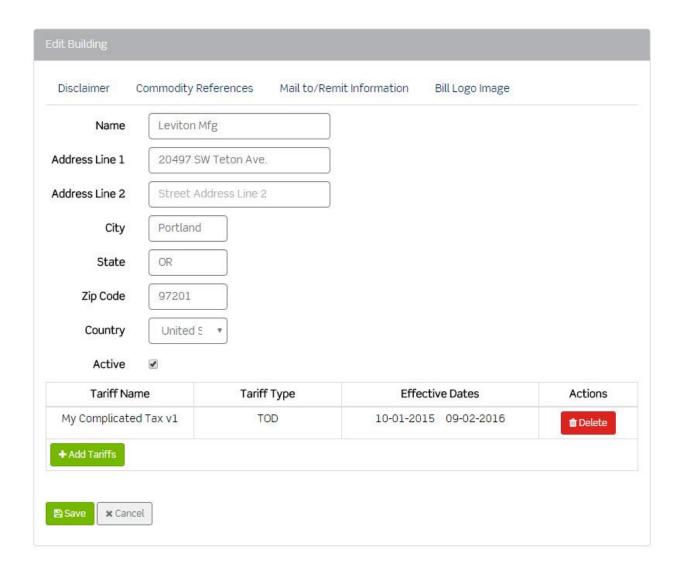
- a. Disclaimer (user may create a disclaimer relevant to their particular corporation, such as disclaimer related to tenant bills, utility prices, etc.)
- b. Commodity References (may refer to gas usage in CCFs, etc.)
- c. Mail to/Remit Information (address that tenant sends bill payment back to)
- d. Bill Logo Image (customizable area to include company's logo image on bill)
- e. The Ability to add Tariffs (a rate structure used for billing energy to end users. Tenant Billing Module allows for the creation of tariff as desired by end user; formats offered are simple tiered tariff and TOU tariff)

Building: Leviton Mfg



Building Setup with all modules unlocked.

Building: Leviton Mfg



Support

1. Click Support.



2. The support screen is displayed.

For support, please contact:

Leviton Lighting & Energy Solutions 20497 SW Teton Avenue Tualatin, OR 97062

- Knowledgebase and Forums
- Mon-Fri 6:00 AM-4:00 PM Pacific Time
- Toll-free: 1-800-959-6004
- Local Portland, OR: 1-503-404-5501
- Fax: 1-503-404-5601
- Email: meters@leviton.com

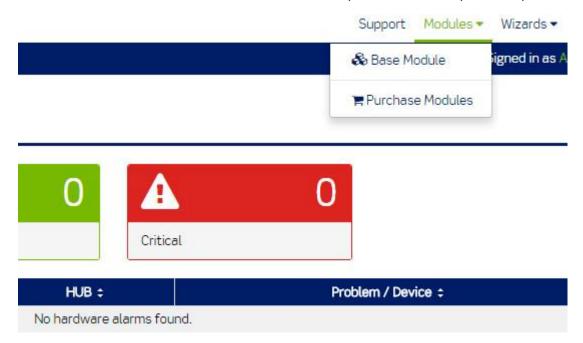


- 3. The support screen provides contact information for customer service and technical support.
- 4. All instructional videos for the Building Manager Online 3.0 are listed on the support screen.

Modules Menu

The modules menu allows you to jump between the base module and other purchased modules.

1. Click modules. There will be two menu items if you do not own any of the expansion modules.



Additional menu items will become visible with the purchase of expansion modules.



Expansion modules include:

- a. Code Compliance module
- b. Executive Reporting module
- c. Tenant Billing module

Modules Menu > Purchasing Modules

The last menu item is Purchase Modules.

- 1. This allows you to expand functionality for the Building Manager Online 3.0.
- 2. Click Purchase Modules.



The purchase modules screen is displayed.

The purchase modules screen allows you to locate a Leviton representative or distributor in your area. Expansion modules must be purchased from a Leviton representative or distributor.

Modules Menu > Purchasing Buildings

The last menu item is Purchase Modules.

- 1. This allows you to increase the maximum number of buildings added to the expansion modules for the Building Manager Online 3.0.
- 2. Click Purchase Modules.



The purchase modules screen is displayed.

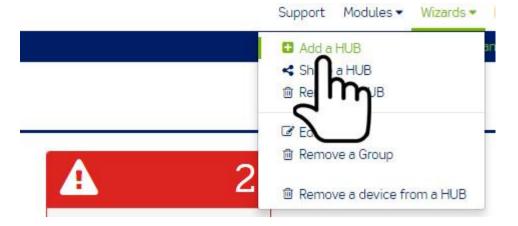
The purchase buildings screen allows you to locate a Leviton representative or distributor in your area. Additional buildings must be purchased from a Leviton representative or distributor.

Wizards

The purpose of the Wizards menu is to provide assistance in accessing globally used functions throughout the Building Manager Online 3.0.

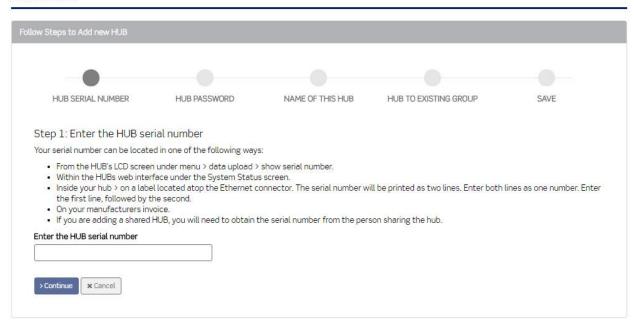
Wizards > Add a Hub

- 1. Click Wizards
- 2. Click Add a Hub.



The Add a Hub screen is displayed.

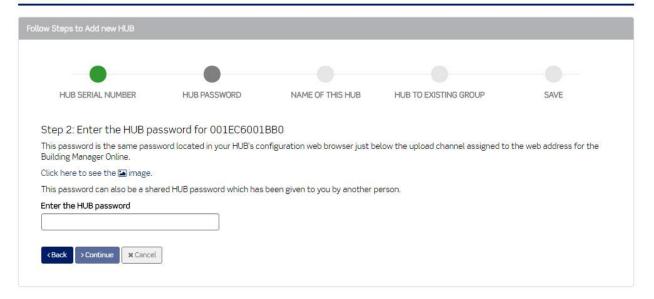
Add a HUB



3. Enter the serial number for the hub.

- a. To access the serial number for an embedded Hub or embedded HubLite, press the menu button, select data upload, then select show serial number, the serial number will appear on the LCD screen.
- b. To access the serial number for an EMH hub, remove the lid. The serial number is located on the label on the Ethernet port.
- c. To access the serial number for an EMH+. Touch the about icon and scroll down. The serial number will be displayed on the LCD screen.
- 4. Click the Continue Button
- 5. Enter the HUB password on the screen that is displayed.

Add a HUB



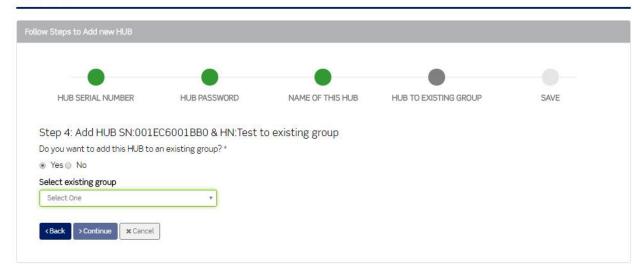
- 6. Enter the Hub password set in the upload page of the hub.
 - a. Important: Set the channel password on your device prior to adding your device to the Building Manager Online 3.0.
 - b. If you do not know the hub password, contact the site manager for assistance to access the device.
- 7. Click the Continue Button.
- 8. Enter the name of this HUB on the screen that is displayed.

Add a HUB



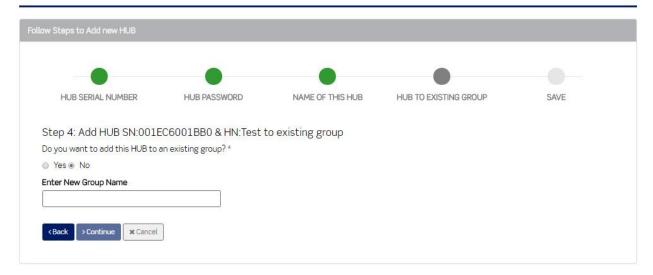
- 9. Enter a unique name for the Hub.
- 10. Click the Continue Button.
- 11. Click Yes to select an existing group.
 - a. The System Network must contain at least one group to select an existing group.

Add a HUB



- 12. Click No to create a new group.
 - a. Enter a name for the group.

Add a HUB

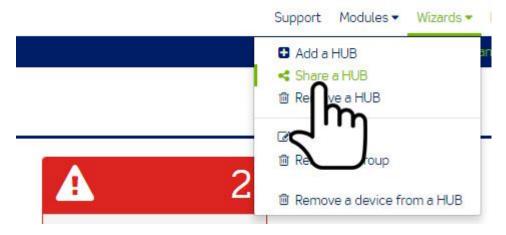


- 13. Click the Continue Button.
- 14. Click the Save Button.
- 15. The Hub will be displayed in the System Network under an existing group or a new group.



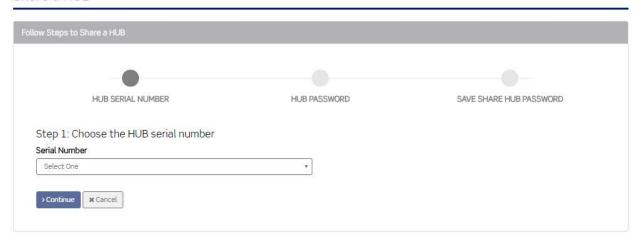
Wizards > Share a Hub

- 1. Click Wizards.
- 2. Click Share a HUB.



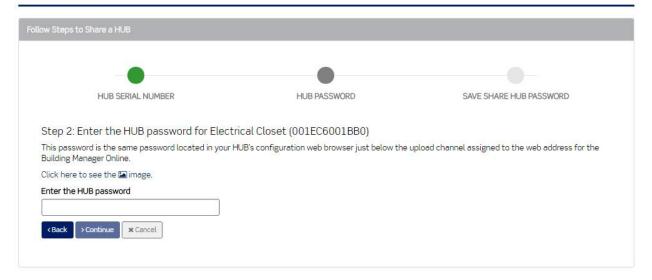
- The Share a HUB screen allows you to select a hub, assign a temporary password to the hub and then share the serial number and temporary password with another Building Manager Online
- Sharing allows you to share hub and meter data with another user without granting them full access to your hub.
- The shared user will not be able to edit the configuration settings for the shared hub.
- The Building Manager Online 3.0 will store one temporary shared password per hub.
- When a temporary shared password is changed the shared user no longer has data access to the shared hub.
- 3. Select the serial number for the hub you would like to share.

Share a HUB



4. Click the Continue button.

Share a HUB



- 5. Enter the Hub password set in the upload page of the hub. Important: Set the channel password on your device prior to adding your device to the Building Manager Online 3.0.
 - a. If you do not know the hub password, contact the site manager for assistance to access the device.
- 6. Click the Continue button.

Share a HUB



- 7. Enter the share password for the hub.
 - a. Once again, this is a temporary password assigned to a hub that allows you to share the hub with another Building Manager Online 3.0 user.
 - b. If a shared password is assigned to this hub at a later date, the data connection will be discontinued for the original share.
- 8. Click the Save button

Wizards > Remove a Hub

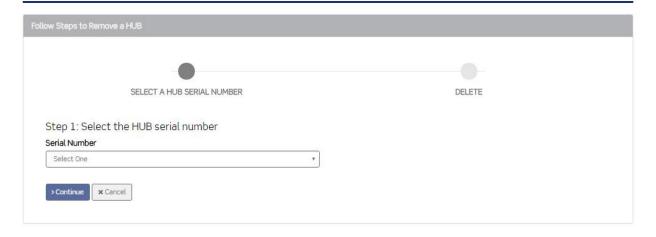
- 1. Click Wizards.
- 2. Click Remove a Hub.



This option allows you to remove a hub from a group.

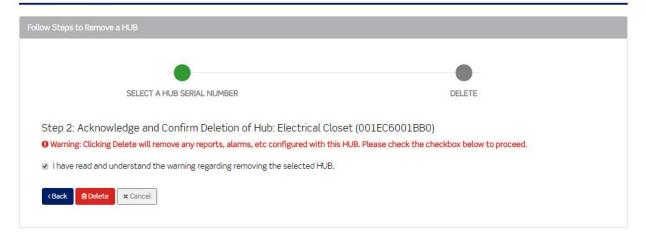
3. Select the serial number.

Remove a HUB



4. Click the Continue button.

Remove a HUB



- 5. Click the "I have read and understand..." checkbox.
- 6. Click the Delete button.

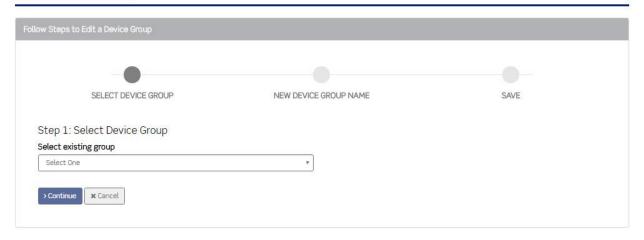
Wizards > Edit a Group

- 1. Click Wizards.
- 2. Click Edit a Group.



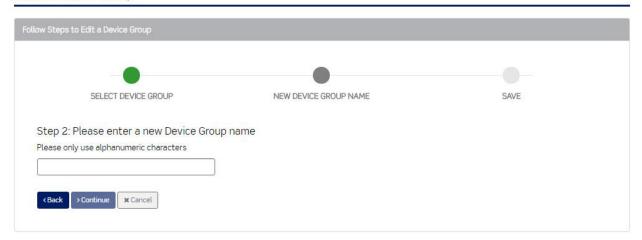
3. Select the Group.

Edit a Device Group



4. Click the Continue button.

Edit a Device Group



- 5. Enter a new name for the group.
- 6. Click the Continue button.

Edit a Device Group

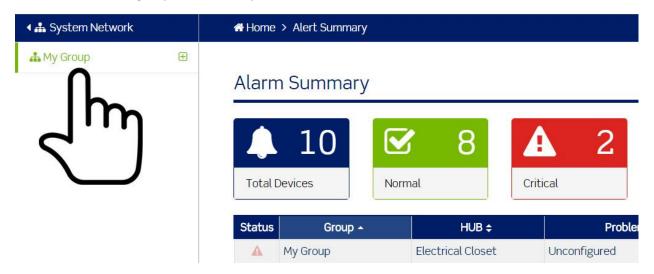


7. Click the Save button.

Wizards > Remove a Group

Note: In order to remove a group, the group cannot contain hubs.

- 1. Locate the group in the System Network.
- 2. Click on the group and see if any hubs are attached.



3. If the group contains hubs, remove the hubs and then proceed.



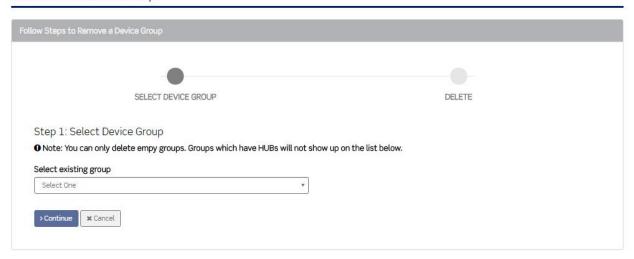
- 4. Click Wizards.
- 5. Click Remove a Group.



Select the Group screen is displayed.

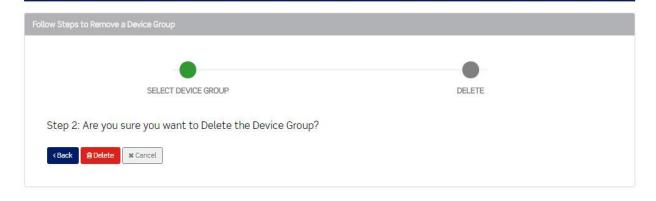
- 6. Click the Cancel button to discard changes.
- 7. Click the Continue button to proceed to the next step.

Remove a Device Group



Are you sure you want to Delete the Device Group screen is displayed.

Remove a Device Group



229 | Page



- 8. Click the Back button to return to the previous step OR
- 9. Click the Cancel button to discard changes OR
- 10. Click the Delete button.

Wizards > Remove a device from a Hub

- 1. Click Wizards.
- 2. Click Remove a device from a HUB.

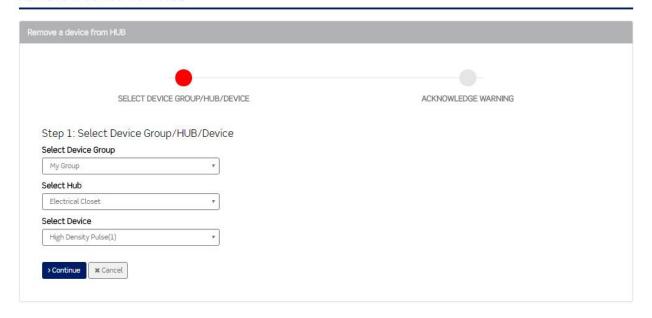


The remove device screen allows you to remove a device from a hub.

Note: The remove device screen allows you to purge all data in the Building Manager Online 3.0 for a selected device. This will not physically remove the device from the hub. If the device has not been physically disconnected from the hub, the next time the hub communicates/uploads data to the Building Manager Online 3.0, the removed device will be added with fresh data.

3. Select the Group, Hub, and Device.

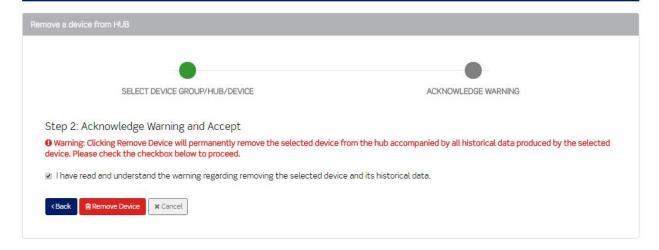
Remove a device from HUB



- 4. Click the Cancel button to discard changes.
- 5. Click the Continue button to proceed to the next step.

Acknowledge Warning and Accept screen is displayed.

Remove a device from HUB

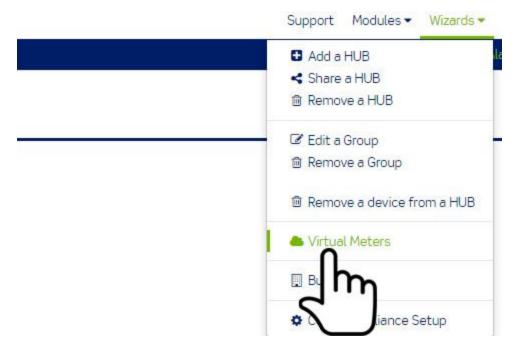


- 6. Click the "I have read and understand..." checkbox.
- 7. Click the Back button to return to the previous step OR
- 8. Click the Cancel button to discard changes OR
- 9. Click Remove Device to remove the device.

Wizards > Virtual Meters

This menu item is visible after purchasing the Code Compliance module, the Executive Reporting module, or the Tenant Billing module.

- 1. Click Wizards.
- 2. Click Virtual Meters.



The Virtual Meters list screen is displayed. From this screen you can add, edit, activate or deactivate a virtual meter.

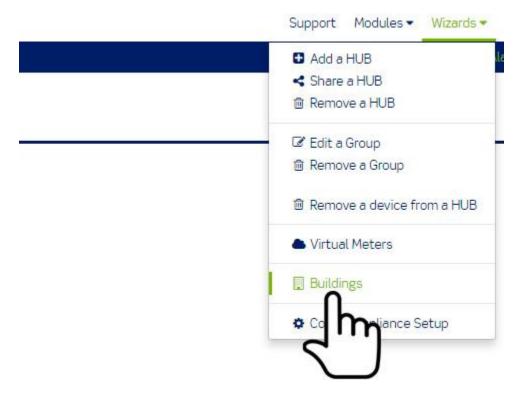
Virtual Meters



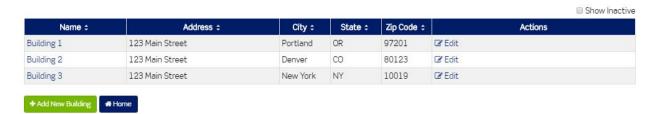
Wizards > Buildings

This menu item is visible after purchasing the Code Compliance module, the Executive Reporting module, or the Tenant Billing module.

- 1. Click Wizards.
- 2. Click Buildings.

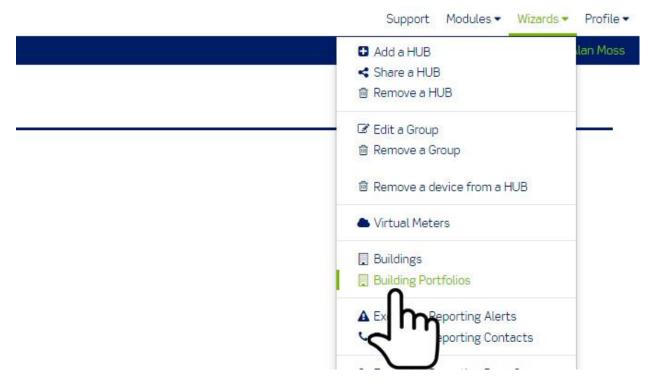


The Buildings list screen is displayed.



Wizards > Building Portfolios

- 1. Click Wizards.
- 2. Click Building Portfolios.



The Building Portfolios list screen is displayed.

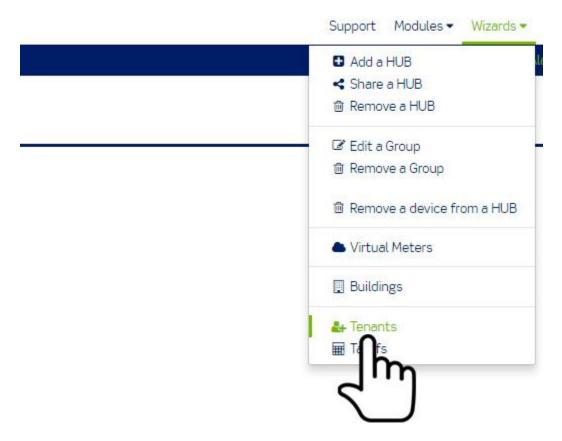
Building Portfolios



Wizards > Tenants

This menu item is visible after purchasing the Tenant Billing module.

- 1. Click Wizards.
- 2. Click Tenants.



The Tenants list screen is displayed. From this screen you can add and edit tenants.

Tenants



Wizards > Tariffs

This menu item is visible after purchasing the Tenant Billing module.

- 1. Click Wizards.
- 2. Click Tariffs.

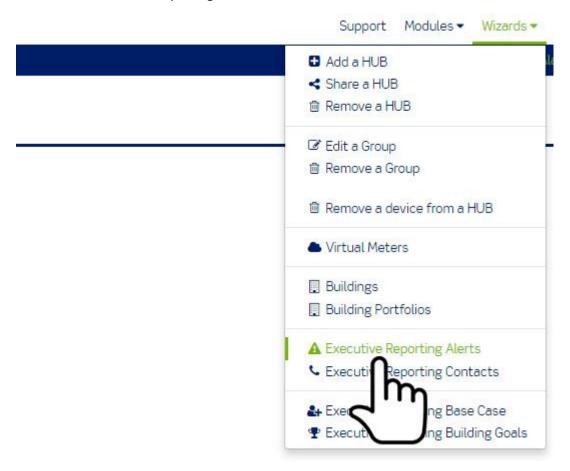
Tenants

Name :	Building :	Unit ¢	Phone :	Email :	Move In ‡	Move Out ¢	Actions
Customer 1	1 Leviton Mfg	2	503-555-5555	⊠user1@leviton.com	03/01/2016	02/28/2017	☑ Edit
Customer 2	● Leviton Mfg	2	503-555-5556	☑user2@leviton.com	04/01/2017	03/31/2018	☑ Edit

The Tariffs list screen is displayed. From this screen you can add and edit tariffs.

Wizards > Executive Reporting Alerts

- 1. This menu item is visible after purchasing the Executive Reporting module.
- 2. Click Wizards.
- 3. Click Executive Reporting Alerts.

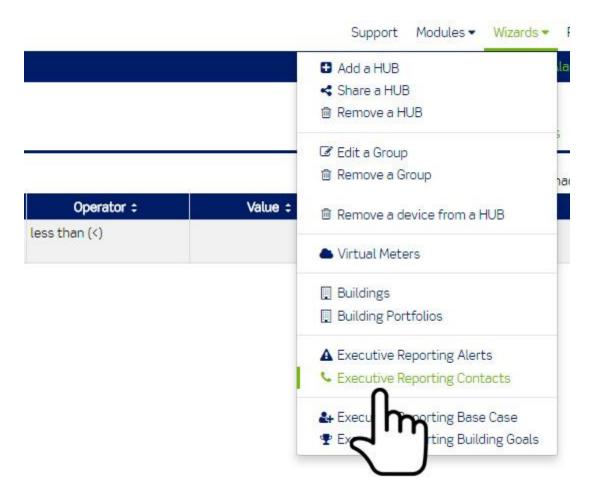


Executive Reporting Alerts list screen is displayed.

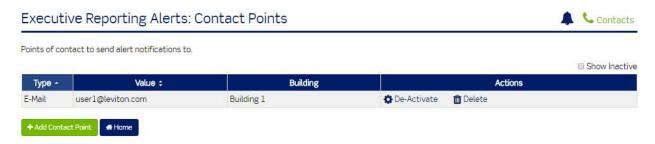


Wizards > Executive Reporting Contacts

- 1. Click Wizards.
- 2. Click Executive Reporting Contacts.

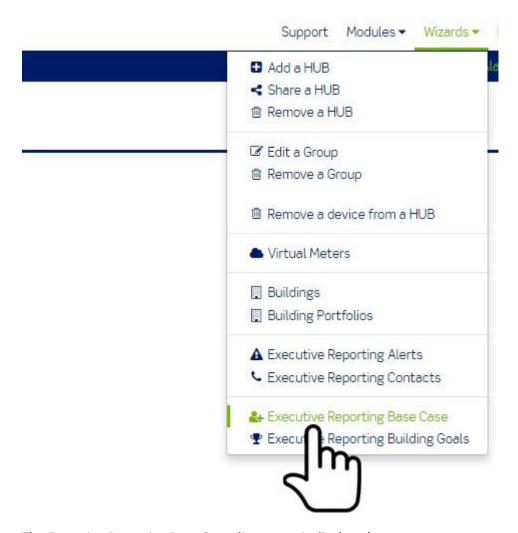


The Executive Reporting Contacts list screen is displayed.



Wizards > Executive Reporting Base Case

- 1. Click Wizards.
- 2. Click Executive Reporting Base Case.



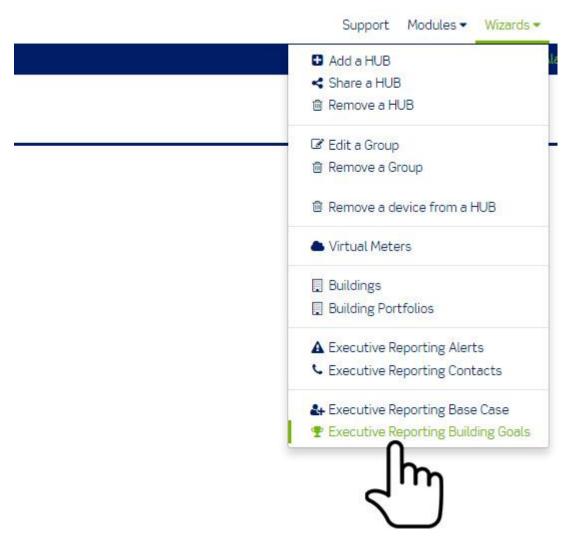
The Executive Reporting Base Cases list screen is displayed.

Executive Reporting Base Cases



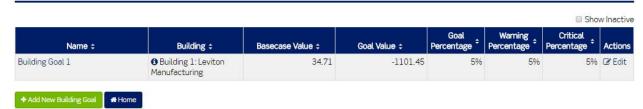
Wizards > Executive Reporting Building Goals

- 1. Click Wizards.
- 2. Click Executive Reporting Building Goals.



The building goal list screen is displayed.

Building Goal List

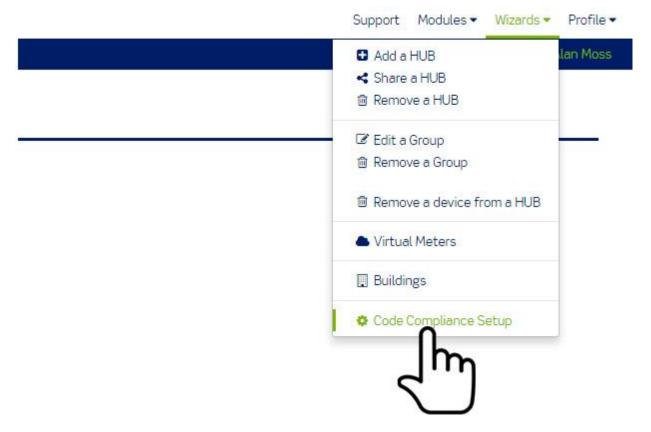


Wizards > Code Compliance Setup

This menu item is visible after purchasing the Code Compliance module.

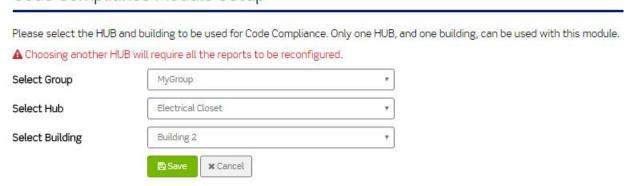
- 1. Click Wizards.
- 2. Click Code Compliance Setup.

239 | Page



The Code Compliance Module Setup screen is displayed.

Code Compliance Module Setup

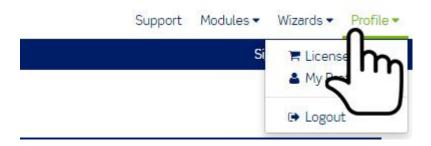


Account Profile

Profile > License

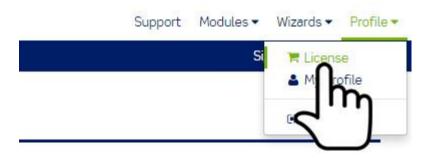
This is the user information screen containing email, phone number, address, etc. that can be edited as necessary.

1. Click Profile.



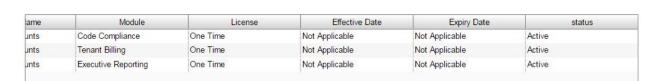
The Profile menu has three items. The first menu item is License.

2. Click License.



The user licenses screen is displayed.

User Licenses

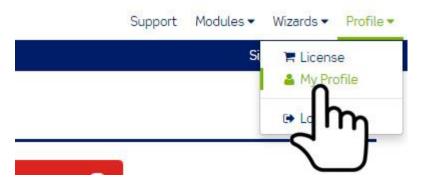


- The user licenses screen lists all of the licenses purchased for the Building Manager Online 3.0.
- The Base module license is free of charge. All other additional modules must be purchased to

Base Module > Profile > My Profile

The second menu item is My Profile.

1. Click My Profile.



The user profile screen is displayed.



The user profile screen has three menu items.



Note: A fourth menu item becomes visible after purchasing the Executive Reporting module.



Profile > My Profile > View

The first menu item is view profile.



The user profile screen is the default screen. The user profile screen displays the contact information for the Building Manager Online 3.0 account.

User Profile - User 1

Login Name

NoAccounts

E-Mail Address

user1@leviton.com

First Name

User

Last Name

1

Address

20497 SW Teton Avenue Tualatin, OR 97062 **503-404-5500**

Time Zone

America/Los_Angeles

Profile > My Profile > Change Password

The second menu item is Password.



1. Click Password.

The change password screen is displayed. The change password screen displays the Building Manager Online 3.0 account login name and the Building Manager Online 3.0 account email address.

2. Enter your current password.

Current Password	
Current Password	
New Password	
New Password	
Confirm New Password	
Confirm New Password	
Save	5 Undo
Save	obnU C

a. If you have forgot your current password, click Profile > click Logout > click Forgot Password?



- b. Enter your email address.
- c. Click Reset.
- d. You will receive an email with instructions for signing in and updating your password.
- 3. Enter your new password.
- 4. Re-enter your new password in the confirm new password field.
- 5. Click the Undo button to clear the fields OR
- 6. Click the Save button to save the change.

Profile > My Profile > Edit Profile

The third menu item is edit profile.



- 1. Click Edit.
- 2. The edit profile screen is displayed.



The edit profile screen allows you to modify your profile information. Note: Login Name cannot be modified.

- 3. Click in the field to be modified.
- 4. Enter changes.
- 5. Click the Undo button or simply navigate out of the screen without clicking the Save button to discard changes OR
- 6. Click the Save button to save changes.

Profile > My Profile > Share Dashboard

Share Dashboard is the fourth menu item. Note: This fourth menu item becomes visible after purchasing the Executive Reporting module.



1. Click Share Dashboard.

The share dashboard screen is displayed.



The share dashboard screen allows you to grant other Building Manager Online 3.0 users with view access to your Executive dashboard.

Profile > My Profile > Share Dashboard > Add a User

- 1. Enter an email address into the User E-mail field.
- Click the Share button.



- 3. Click Cancel if you do not want to proceed OR
- 4. Click OK to share your Executive Dashboard.



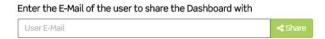
- If the entered email address is not associated with a Building Manager Online 3.0 account, you will receive an error message and the email address will not be added to the table in the share dashboard screen.
- If the entered email address is associated with a Building Manager Online 3.0 account, you will receive a confirmation message and the shared account will display in the table in the share dashboard screen.

Profile > My Profile > Share Dashboard > Remove a User

The users you are sharing your Executive Dashboard will be listed in the table in the body of the Share Dashboard screen.

1. Each user will have an Unshare icon to the right of their email address.

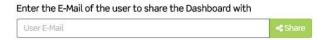
2. Click the Unshare icon.



Your Dashboard is shared with the following users

First Name ¢	Last Name 🗻	E-Mail ÷	Actions
User	1	user1@leviton.com	O Unshare
			h _U
			7)

The user share is now removed from the dashboard.



Your Dashboard is shared with the following users

First Name ÷	Last Name 🚣	E-Mail +	Actions
	Dashboard not shared.		

Profile > My Profile > Go to Contact Points

This button is visible after purchasing the Executive Reporting module.

Executive Reporting Contact Points

The Contact points for Executive Reporting Alerts have been relocated to a separate page under Executive Reporting > Alerts.

In addition, you can now access it through the top menu under Wizards > Executive Reporting Contacts.

> Go to Contact Points

1. Click the Go to Contact Points button.

Executive Reporting Contact Points

The Contact points for Executive Reporting Alerts have been relocated to a separate page under Executive Reporting > Alerts.

In addition, you can now access it through the top menu under Wizards > Executive Reporting Contacts.



The Executive Reporting Alerts: Contact Points list screen is displayed.

Executive Reporting Alerts: Contact Points



Points of contact to send alert notifications to.

Show Inactive

Туре -	Value ÷	Building	Actions
E-Mail	user1@leviton.com	Building 1	De-Activate Dele

From this page the user can set up multiple addresses for alerts, or edit/delete addresses currently entered.

Profile > Log Out

- 1. Click Profile.
- 2. Click Log Out.



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You are now signed out of the Building Manager Online 3.0.

LEVITON_® VerifEye™ Building Manager Online 3.0

