



Web Users Guide

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

The ISS EBS Team

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What is the EBS Web?

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

System requirements

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

Logging into EBS

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

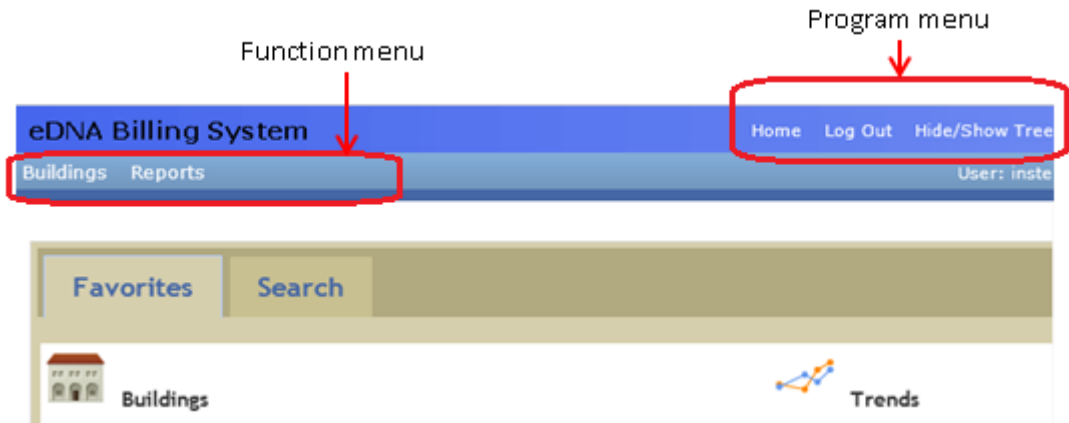
To log into the EBS website:

1. Open your browser.
2. In the address field type the appropriate URL then press the **Enter** key. The system displays the login page¹.
3. Type your **User Name** and **Password**.
4. Click the **Login** button. The system displays the EBS Home page.

¹ Some installations are configured to integrate with the organization's centralized authentication process. Please consult your system administrator for details.

The EBS Home page

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



The program menu

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

Home

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

Log Out

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

Hide/Show Tree

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

The function menu

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

Buildings

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

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

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

Reports

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

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

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

Navigation area

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

The navigation area provides the following information:

Function	Navigation area contents
Home page	Displays favorites for buildings and trends. Favorites are preselected building/meter information or trends you saved because you view them often.
Buildings	There is no content in this area for the Buildings function. Th area is automatically hidden.
Reports	Displays the Report Menu where you select the type of report you want to display.

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Buildings function

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

Using the **Buildings** function, you can do the following:

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

Using the Favorites control

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

Building favorites include a selection of buildings.

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

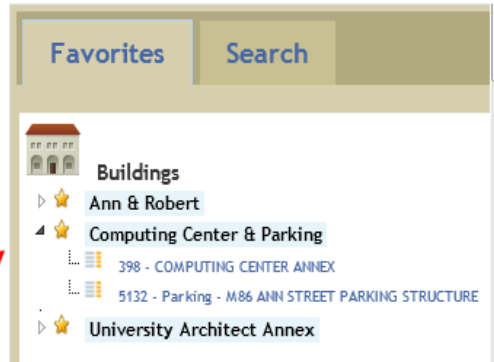


Expanding buildings list

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

To hide the list, click on the arrow again.

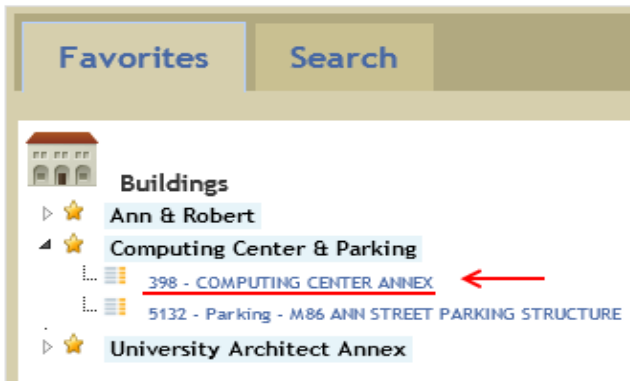
Click to display saved buildings



Viewing building details & meters

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

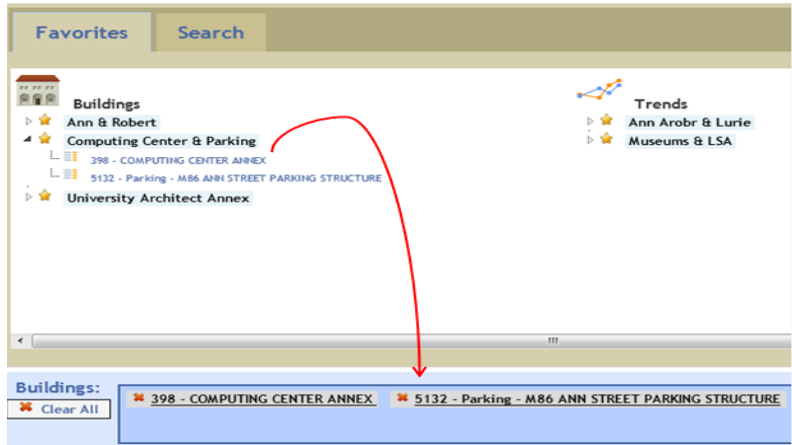
Click on the name to load building details and meters



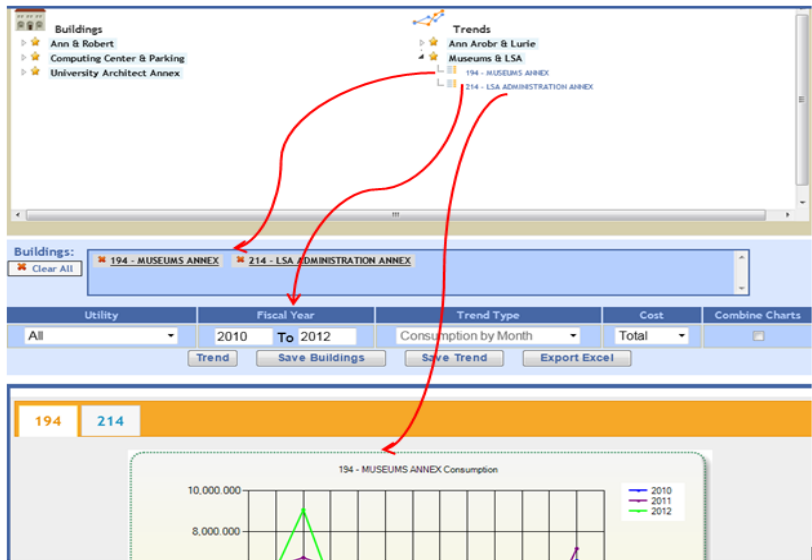
Loading favorites

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

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



Loading a **Trends** favorites will load the saved buildings as well as the trend parameters. It will also generate and load the saved trend.

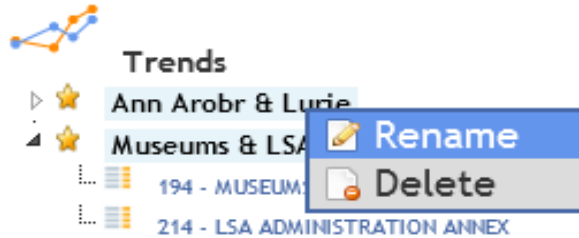


Renaming and deleting favorites

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

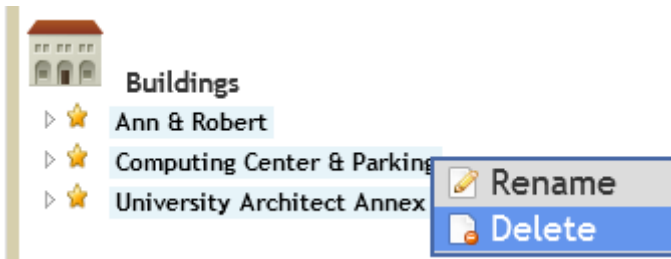
Select **Rename** from the pop-up menu to rename the favorite.

Select **Delete** from to delete the favorite.



Removing buildings from a favorite

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



Saving favorites

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



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



Using the Search control

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

Searching building information

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

- **BID** (Building ID)
- **Building Name**
- **Address**

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

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

Loading more search results

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

The **Show More** button will load the next 100 results.

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

Search				All	
BID	Building Name	GSF	Campus	Address	
	203	PRESIDENTS RESIDENCE	13,781		815 S UNIVERSITY
	204	VAUGHAN HENRY F PUBLIC HEALTH 1	210,906		109 S OBSERVATORY
	204T	SPH II CONSTRUCTION TRAILER	0		
	205	1027 E. HURON BUILDING	6,066		1027 E HURON
	207	MODERN LANGUAGES BUILDING	135,060		812 E WASHINGTON
	208	RANDALL HARRISON M LABORATORY	217,169		500 E UNIVERSITY

[Show More](#) [Show All](#)

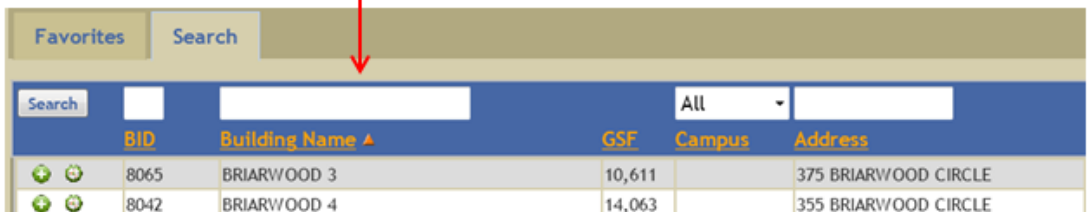
Sorting search results

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

- **BID**
- **Building Name**
- **GSF**
- **Campus**
- **Address**

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

Click on the headers to sort the result. These results are currently sorted by "Building Name"



Search		All			
BID	Building Name ▲	GSF	Campus	Address	
8065	BRIARWOOD 3	10,611		375 BRIARWOOD CIRCLE	
8042	BRIARWOOD 4	14,063		355 BRIARWOOD CIRCLE	

Viewing building details and meters

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



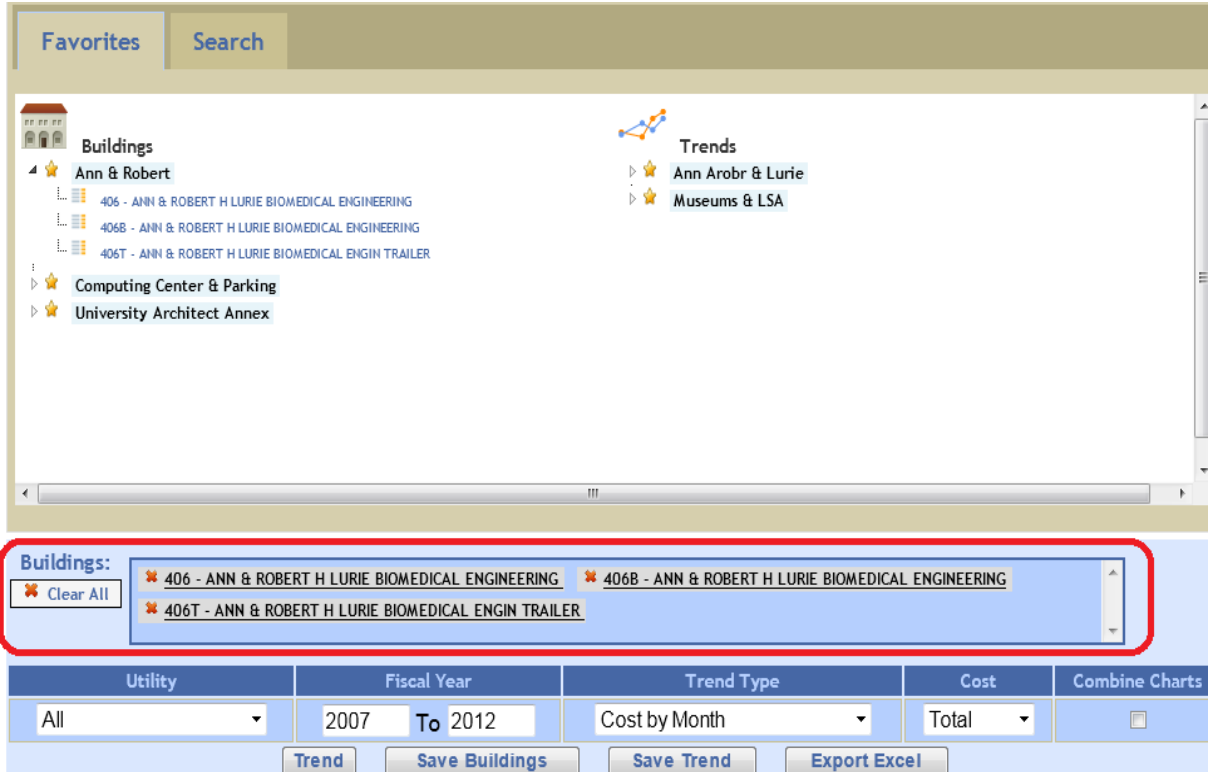
Adding building to selections box

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





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

Selections Box



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

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

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

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

Building Details and Meters

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

The screenshot shows the eDNA Billing System interface. At the top, there is a navigation bar with 'Home', 'Log Out', and 'Hide/Show Tree'. Below this, the page title is '406 - ANN & ROBERT H LURIE BIOMEDICAL ENGINEERING'. The 'Building Details' section includes a table with the following information:

Address	1101 BEAL ANN ARBOR, MI 48109 2106	GSF	65,028
Official ID	0406	Occupancy	
Campus		Comments	Building name changed from Advanced Technology Lab Sq Foot change per B Weakley cv 7/5/06
Building Type	Space Building		

Below the building details is a table of meters:

No	Meter ID	Cost Allocation	Location	Type	Vendor	Status
<input type="checkbox"/>	518290-406	100% to 162500 / GF	SPLIT	PUP Virtual	CITY OF ANN ARBOR WATER & SEWER	Inactive
<input type="checkbox"/>	529511-406	100% to 162500 / GF	2570 dRAPER RD	PUP Virtual	CITY OF ANN ARBOR WATER & SEWER	Active
<input type="checkbox"/>	516857	100% to 162500 / GF	1101 BEAL AVE	PUP	CITY OF ANN ARBOR WATER & SEWER	Active
<input type="checkbox"/>	516856	100% to 162500 / GF	1101 BEAL AVE	PUP	CITY OF ANN ARBOR	Active

At the bottom, there is a 'Trend Control' section with a 'Fiscal Year' dropdown set to '2007 To 2012', a 'Trend Type' dropdown set to 'Cost by Month', and buttons for 'Show Trend(s)' and 'Export Excel'.

Sorting meters table

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

Loading trends

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

Exporting trend data

After trend data has been loaded, an button becomes available. Click on this button to export the data as an Excel file.

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What are trends?

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

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

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

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

Loading trends

There are two ways to load trends:

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

Trend options

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

The screenshot shows a web interface for selecting buildings and configuring trend options. At the top, there is a 'Buildings:' section with a 'Clear All' button and a list of selected buildings: '398 - COMPUTING CENTER ANNEX' and '5132 - Parking - M86 ANN STREET PARKING STRUCTURE'. Below this is a table of configuration options:

Utility	Fiscal Year	Trend Type	Cost	Degree Days	Combine Charts
All	2007 To 2012	Cost by Month	Total	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom of the form are four buttons: 'Trend', 'Save Buildings', 'Save Trend', and 'Export Excel'.

There are five options for the trend parameters:

Utility	The Utility option can be set to trend data of a specific utility, or for all utilities combined.
	If “ All ” utilities is selected, the Trend Type options with Consumption will be disabled.
Year	The Year option sets the date range for the data to trend. The year should be inputted as four digit years (e.g. 2010).
Trend Type	There are four trend types to choose from. These options control the types of data on the Y-axis (cost or consumption) and on the X-axis (months or years).
Normalization	<p>The trend data can be normalized by choosing the Per GSF option under Normalization. This divides the cost/consumption data by the GSF of the building so it is easier to compare the relative values against building with different GSFs.</p> <p>To disable normalization, choose the Total option, which trends the raw data for cost/consumption for each building.</p>
Degree Days	Check the checkbox under Degree Days to normalize the data by degree days. This standardizes the cost/consumption data by taking degree days into consideration. Enabling this option is configurable frm web.config file
Combine Charts	Selecting the Combine Charts option results in trending the multiple buildings in one chart for comparison purposes.this option is available only if the ” Trend Type ” is Consumption/Cost by Month

After the trend options are set, and the buildings are selected, click the



button to load the trend. The raw data will also be loaded.

Exporting trends

You can export trends as an Excel file by clicking the



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

Printing trends

After you display a trend, you can print it on your local printer by using the print option on your browser.

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What are reports?

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

Filter Options

The screenshot displays the 'eDNA Billing System' interface. At the top, there are navigation links: 'Home', 'Log Out', and 'Hide/Show Tree'. Below this, the user is identified as 'User: instep'. The main menu includes 'Buildings' and 'Reports'. The 'Reports' section is expanded, showing a list of report options: Building Report, Purchased Utility Billing Data, Electric Demand Report, Generated Utility Billing Rep, Utility Services Sales By Fur, Utility Services Sales By Bui, Outlying Boiler Service Deta, Shortcode Summary Report, Billing Summary by Building, and Stormwater Detail. The 'Building Report' is selected. To the right, the 'Report - Building Report' window is open, showing a 'Report Filters' dialog. This dialog has a table with columns 'Field', 'Value', and 'Req'. The 'Field' column contains 'Building Number' and 'Building Name'. Below the table, there are dropdown menus for 'Primary Sort Field' and 'Secondary Sort Field', both set to '- None -', and 'Asc' buttons. There is also a 'Select View' dropdown set to 'Show Below' and a 'Submit' button. Red arrows point to the 'Reports to choose from' menu, the 'View (Export) Options' dropdown, and the 'Filter Options' title.

Reports to choose from **View (Export) Options**

The EBS Web may include the following reports:

- **Building report.** This report provides a reference for all buildings.
- **Metered Building Consumption.** This is currently referred to as the GUP Book.
- **Meter Billing ID.** This report includes the meters, buildings, and account information.
- **Electric Demand.** This report is for GUP meters only and is used to monitor the system and transformers.
- **Meter Billing ID Detail.** This report details all of the bills for a meter for a specified time period. It's grouped by building, account, annual report code, and meter.
- **Utility Services Sales.** This report provides a summary of all utility cost per building for a specified time period.

Additional reports may be added in the future. After you display a report, you can export it to any of the following formats:

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

Displaying a report

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

To display a report:

1. On the Function menu, select **Reports**. The system displays the list of reports .
2. In the Function Navigation area, select the report you want to display. The system displays the report Filter criteria.

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

3. Enter the filter information as appropriate.

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

Abbr	Name	Address	Campus	GSF	Build Date
SUT	UT Austin Building	1 University Station Austin, TX 78712	UTM	0	1883
A01	ARL Engr. Support Fac. (PRC 167)	Austin, TX 78758	PRC	28,893	1991
A02	ARL Environmental Facility (PRC 125)	Austin, TX 78758	PRC	12,604	1978
A03	ARL Carpenter Shop (PRC 128)	Austin, TX 78758	PRC	7,610	1984
A04	ARL Security Guards (PRC 100)	Austin, TX 78758	PRC	124	1949
A05	ARL Storage/Warehouse (PRC 29)		PRC	3,149	1982

Sorting a report

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








To sort a report:

1. Display the report you want.
2. Under **Sorting By**, use the **Field** drop-list box to select the field by which you want to sort the report.
3. From the **Order** drop-list, select the order for the sort: **Ascending** (lowest to highest) or **Descending** (highest to lowest).
4. Click the **Generate Report** button. The system displays the resorted report.

Navigating a report

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



Button	Description
	Displays the first page of the report.
	Displays the previous page of the report.
	Displays the next page of the report.
	Displays the last page of the report.
	Type a page number in the field, then click the Go To button to display that page.
	Type a portion of text, then click the Search button to display next page that contains that text.
	Select the zoom level from the drop-list box.

Exporting a report

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

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

To export a report:

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