

# Customer Web Portal



**This Help Guide is for the Dukefield Energy Customer Portal which is powered by Systemslink, a platform which has been designed to track and monitor energy usage. This guide should help you navigate through the system to maximise the functionality available to support you with your energy reporting.**

**If you have any questions, please contact us:**

**Email: [info@dukefieldenergy.co.uk](mailto:info@dukefieldenergy.co.uk)**

**Phone: 0345 4022 461**

# Contents

---

[Introduction](#) Functions at your fingertips

[Access](#) Login to your Web Portal

[Navigation](#) How to navigate the Web Portal

[Groups](#) Understand your portfolio at group level

[Sites](#) View your site level data

[Meters](#) View meter level data

[Meter Readings](#) Maintain an online record of your readings and send to supplier

[Administration](#) Configure the portal to your needs

[Dashboards](#) View your key data at a glance

[Appendix A – Widgets](#) Widgets summarise a variety of data at Group, Site and Meter level giving the end users visibility of their usage / cost / trends and images

# Introduction

---

Your online Web Portal provides the following functions:

## Functions

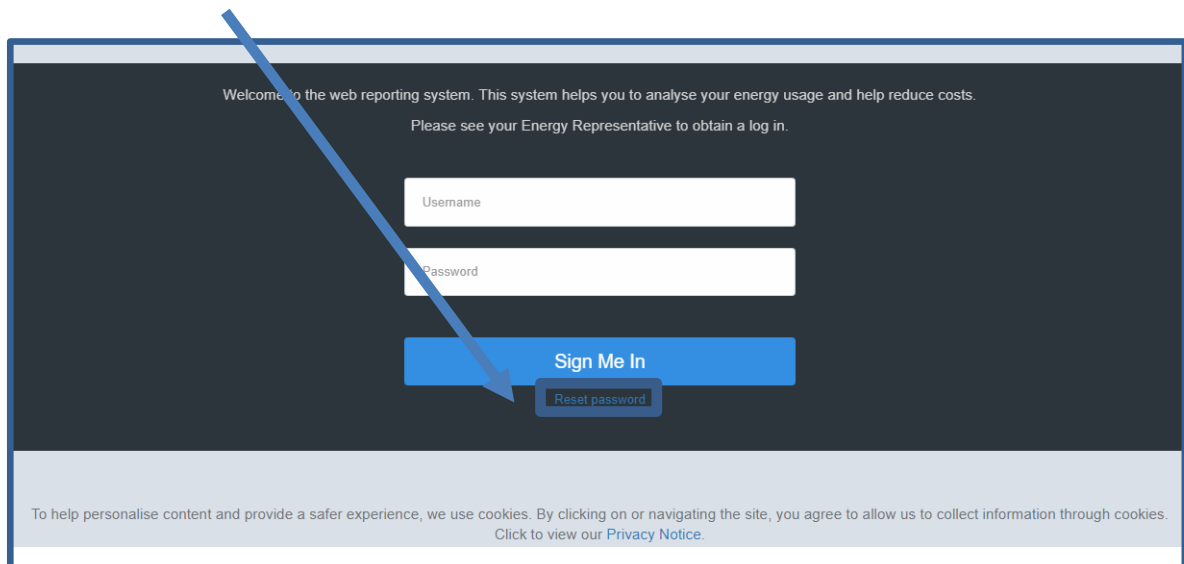
**Dashboards** – Visual summaries of site or group level data. Tailor your dashboard from a selection of widgets including 2-year comparisons, target and accrual visualisations, DEC summary, your own tailored Excel reports and even day+1 data with drill down functionality – an excellent way to view your data in an instant.

**Reporting** – Run a variety of reports at group, meter or site level enabling quick and detailed analysis of usage, costs and trends. From month by month comparisons through to detailed half-hourly reports, customise how they look and the date / reference year you are viewing

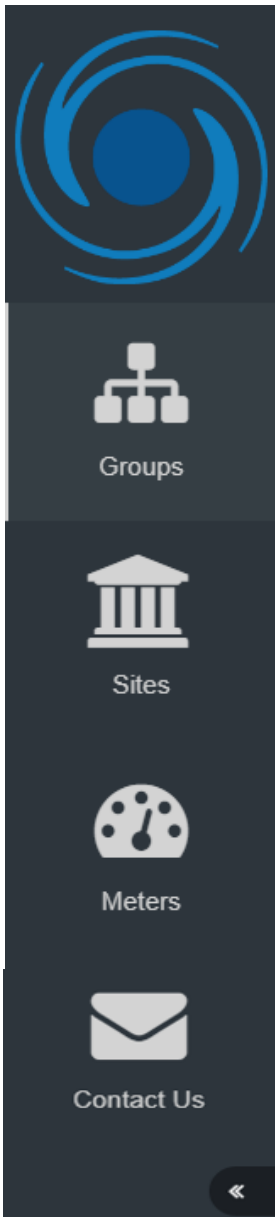
**Meter Readings** – End users can submit their readings, with in-built validation checks to mitigate “bogus” readings and additional free text comments box. The web page is adaptable to mobile devices. You can enter readings one meter at a time and our portal will cache your readings, in case you find yourself in a signal-less basement.

**Configuration** – Configuration groups allows you to create and customise web portal access for different users including reports, layout, logos and permissions.

Reset Password’ functionality. Enter either your username or email address to receive a reset your details email.



# Navigation



**New feature:** The logo within the navigation pane of your web portal is now customisable. Refer to the [Administration](#) page on how to change this

The navigation pane on the left hand side will direct you to the following areas:

## Groups



- A site group user can access all groups within their web portal access
- Select any group and you will be taken to the Group Summary page for more information

## Sites



- View a list of your sites
- The search box can be used to locate any value within the columns displayed
- Columns can be added and removed using the edit function in the top right
- Access a site's [dashboard](#), [reports](#), [meter readings](#) and [exceptions](#)

## Meters



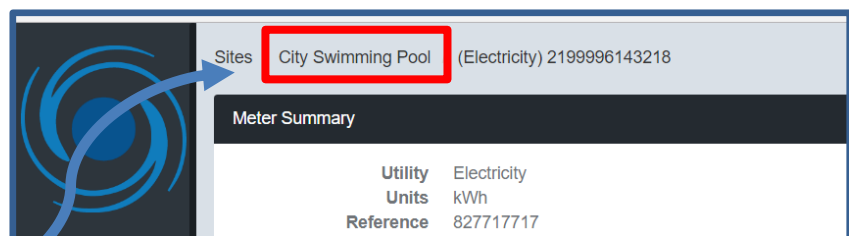
- View a list of your meters
- The search box can be used to locate any value with the columns displayed e.g. MPAN or MSN
- Columns can be added and removed using the edit function in the top right
- Access [Reports](#), billing data and [exceptions](#) for each meter

## Contact Us

- The function enables users to send a message through the portal to a dedicated email address. This can be configured under Administration > Configuration > Contact Information

### New features:

- Selecting this back arrow will hide your navigational pane to maximise the data displayed.
- Breadcrumb trail: at the top of the menu, a trail will appear of how you navigated to the screen. Select any element to return to that window.



# Groups



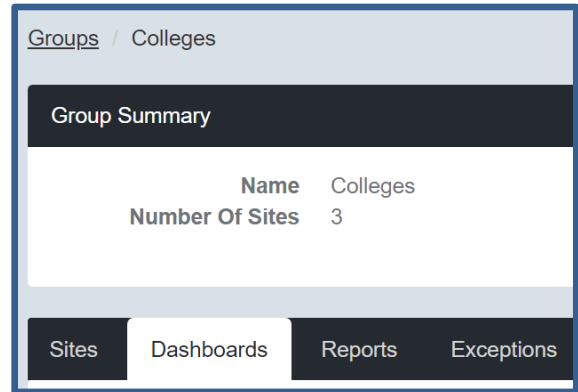
Once you have selected your group, the following options are available:

## Sites

Select your site and be directed to the [site](#) menu.

## Dashboards

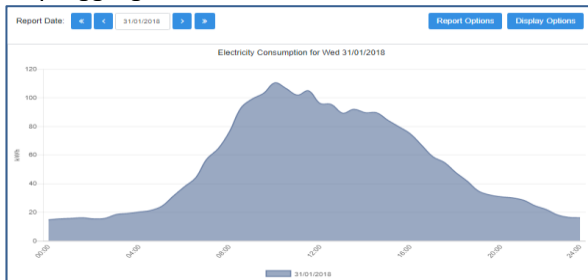
View dashboards for data at group level. For how to create a dashboard, visit our [dashboard](#) section.



## Reports

Run an array of in-house reports are available at group level:

### Group Aggregate Profile



An aggregate profile of the group via the selected utility

#### Report options

- Date: Select end date
- Resolution: 30min or day
- Report Period: Day, week, 4 weeks or 52 weeks
- Utility: Electricity, Gas, Oil, Waste or Water etc.

#### Display Options

Line, area or bar

### Data out of Tolerance

Site Name	Number	MPAN	Value	Average	%
St Marys College	65	2199990192010	1.16	0.92	26.09
St Michaels College	207018282	2199990215993	0.25	0.16	56.25
University College Leeds	39333325	2199990218644	16.90	11.20	50.89

Identifies half-hourly values that are outside a pre-defined set of tolerances

#### Report options

- Date: Select end date
- Utility: Electricity, Gas, Oil, Waste or Water etc.
- Set to calculate upper limits, 0 deviation / 20% tolerance

### Weekly Comparison

Site Name	Site Code	MPAN	20/02/2018	13/02/2018	% Change
St Marys College	545426	2199990199498	82	54	49.85
St Marys College	545426	2199990192010	291	84	248.54
St Michaels College	545422	2199990215993	62	11	468.24
University College Leeds	545417	2199990218644	1930	627	207.93

A comparison of consumption for a specified week against the previous week

#### Report options

- Date: Select end date
- Utility: Electricity, Gas, Oil, Waste or Water etc.

### HH Data Download

Your report will be downloaded into Excel

Report Options

Display Options

Download ▾

Download As Excel

Extract your HH Data data for the specified group and utility

#### Report Options

Select the number of days, weeks, months or years and utility

#### Display Options

Values can be displayed horizontally or vertically in Excel

### Usage Per Unit Floor Area

Report Date: ◀ ◀ 20/09/2018 ▶ ▶

Report Period: 01/09/2018 to 30/09/2018

Site Name	Site Code	Usage	Floor Area (m <sup>2</sup> )	Usage / m <sup>2</sup>
St Marys College	545426	0	2767	0.00
St Michaels College	545422	0	4158	0.00
University College Leeds	545417	0	2391	0.00

Compares usage per unit floor area for each site

#### Report options

Date: Select end date

Utility: Electricity, Gas, Oil, Waste or Water etc.

### Usage vs Target

Report Date: ◀ ◀ 20/12/2017 ▶ ▶

Report Period: 01/12/2017 to 31/12/2017

Site Name	Site Code	Usage	Target	% Change
St Marys College	545426	0	0	0.00
St Michaels College	545422	0	0	0.00
University College Leeds	545417	0	0	0.00

Compares usage against target for each site (targets are set within Energy Manager)

#### Report Options

Date: Select end date

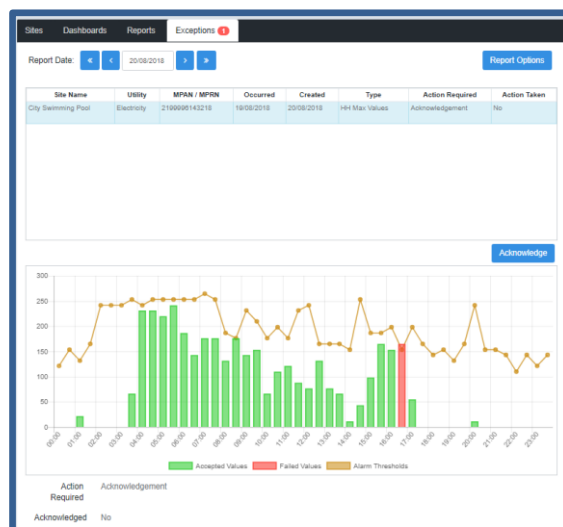
Data Source: Invoice, direct or profile

Report Period: Day, week, 4 weeks or 52 weeks

Utility: Electricity, Gas, Oil, Waste or Water etc.

## Group Exceptions:

View all exceptions powered by our Smart Spaces tool, for the sites contained within the group



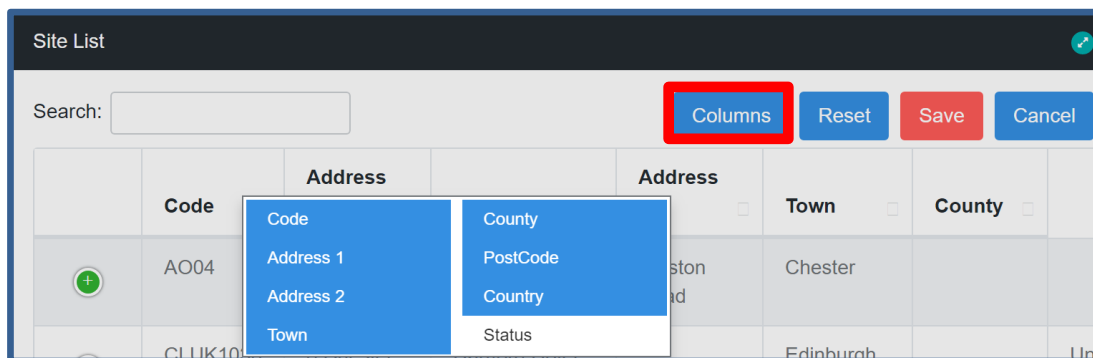
Visit the Exceptions section for further details

# Sites and Meters

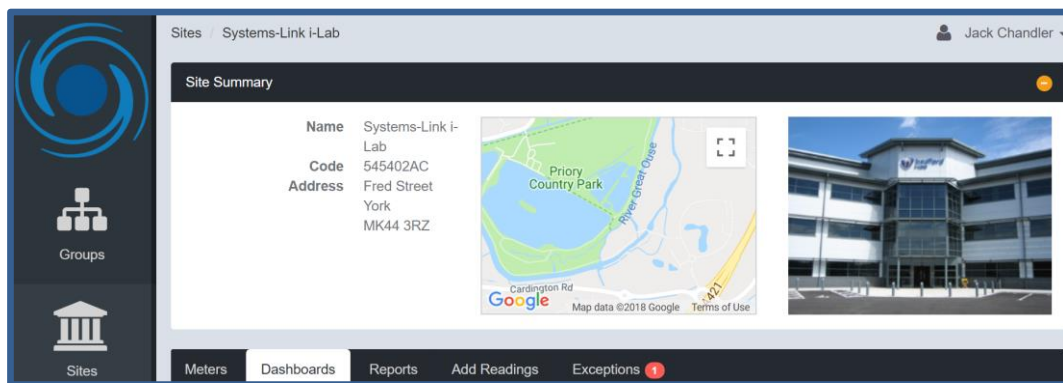
Using the navigation pane, you are able select the sites or meter button.

## Sites

Customise the columns to display the data you need by clicking the settings icon.



Use the Search box to search values in any of the columns on display such as code, postcode, site name or status etc.



The Site Summary box will display the name, code and address of the site with a photo (maps coming soon).

## Dashboards

Create a summary of site-level data using a variety of widgets – more details in the [dashboard](#) section.

## Meters

View details of all the meters associated to the site.

You are able to customise what columns are displayed using the setting icon



Please refer to the following subsection on meters for more details



## Site Reports

The following icon displays reports that run through the web portal and opens the data within your web browser.

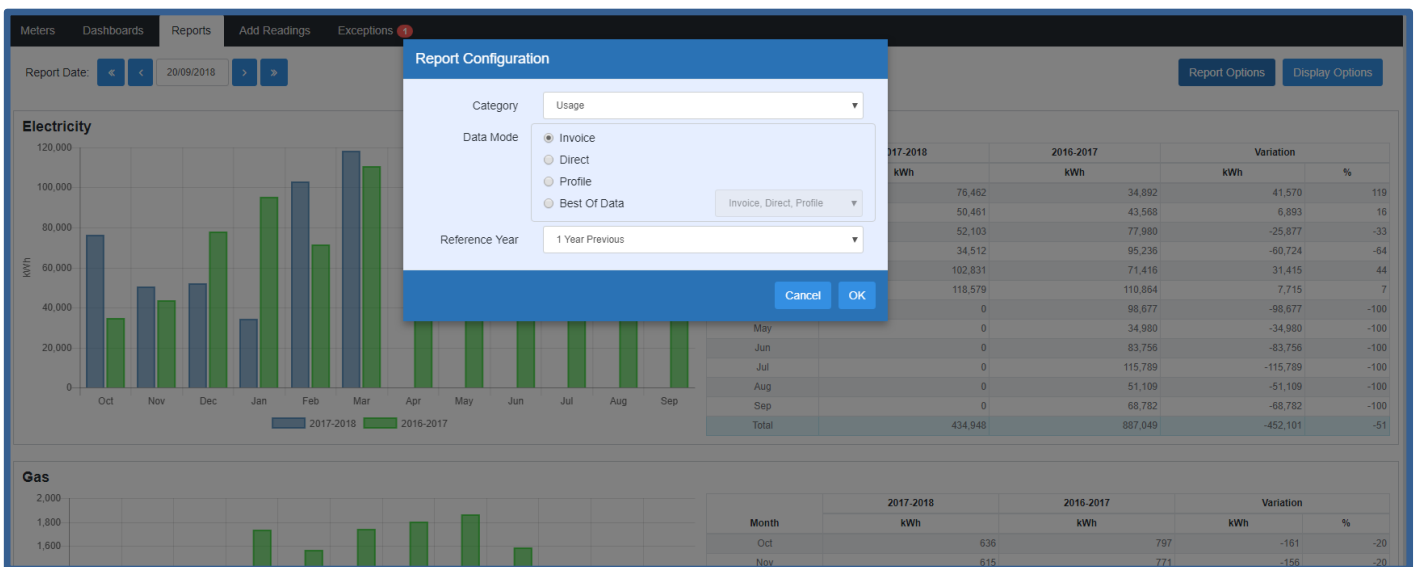


Your 'I' (Invoice), 'D' (Direct) & 'P' (Profile) relate to the data used for reporting

1 and 2 year comparisons are available



Additional Excel Site Reports (loaded via the [administration](#) section) will be accessible here



You can configure your report using the 'Report Options' function, detailed below.

### Report Options

- Data Mode: Invoice, Direct, Profile or a Best of Data hierarchy (Best of Data will choose the first data source and if there are gaps complete the data with the second then third option)
- A 2 year report allows the selection of a reference year such as your baseline year

### Display Options

- Chart Type: Bar, Line, Area or Bar and Line
- Cumulative: Tick this box to see you running totals

## Add Readings

- Please refer to the 'Meter Readings' section of the guide:

**Add Readings**



# Exceptions

Your meter and sites exceptions are powered by our Smart Spaces tool, using the date range and report you can view which rules have triggered.

**Report Configuration**

Action Required  Acknowledge  
 Justify  
 None

Action Taken  No  
 Yes

Report Period: 1 Month(s)

Utility: All

Buttons: Cancel, OK

Check the 'Action Required' options to view your exceptions

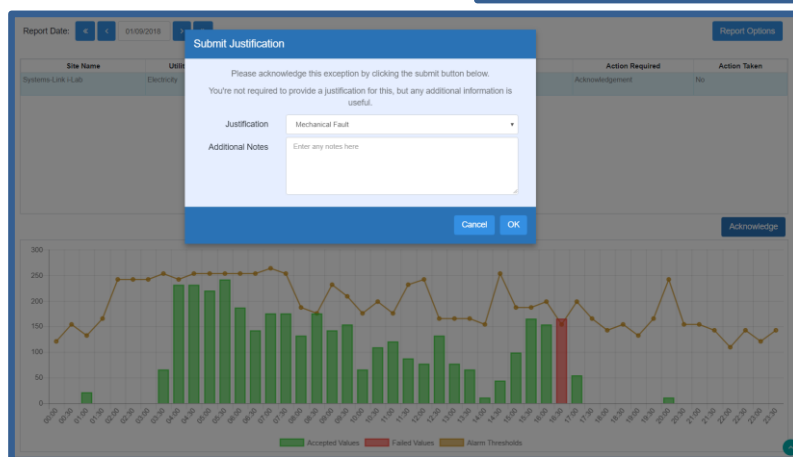
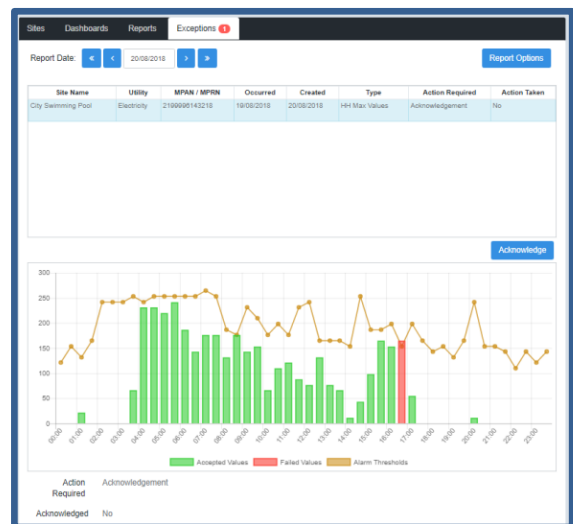
Enter the reporting period or extend to view historical exceptions

You have the ability to be utility specific if required

Click on the exception in view to open the graphical representation

Help identify:

- Early switch on times
- Out of hours usage
- Identify wastage and take action



# Meters



Customise your meter list by clicking the settings  button to display an array of useful meter fields.

The screenshot shows the 'Meter Summary' page with a settings menu open. The menu lists various fields: Usage, Cost, Estimate, VAT, CCL, Meter 1, Meter 2, Meter 3, Meter 4, Meter 5, Meter 6, Meter 7, Meter 8, Cost (exc VAT), Usage/Day, Invoice Number, and Notes. The 'Columns' button is highlighted in red. Below the menu, a table displays meter data for 28/03/2018.

Date	Usage	Cost	Estimate	VAT	CCL	Meter 2	Meter 8	Cost (exc VAT)	Usage/Day
28/03/2018	152459	19116.68	A	3186.11	776.02	621888	0	15930.57	4234.97

Once you have selected your columns, please **click save**

Entering a value in the search box will search across all displayed columns

Select your meter

The following options are accessible

The screenshot shows the 'Meter Summary' page with the 'Reports' tab selected. A 'Data Type' dropdown menu is set to 'Invoice'. Below this, three report options are displayed: '1 Year', '2 Year Comparison', and '2 Year Weekly Comparison'. Each report option includes a description and a 'View Report' button.

# Reports

A number of reports will be made available, 'Data type' drop down menu will filter which reports are available, each report which state using the icons below which data source it can be run in;

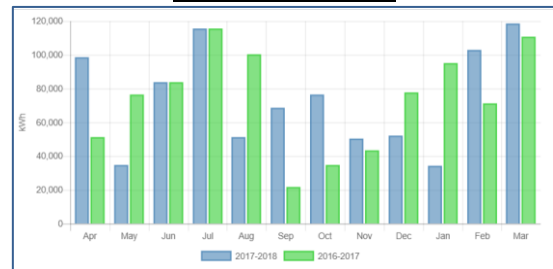
- I Invoice Data (Billed)
- D Direct Data (Manual Readings)
- P Profile Data (HH/AMR)

### 1 Year Summary



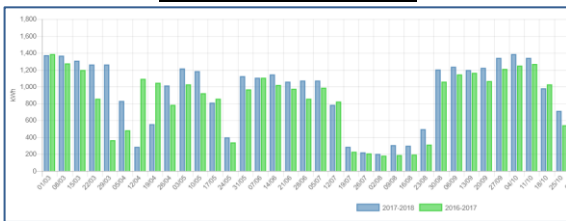
Select the date period and display options to view 1 year's data

### 2 Year Comparison



Select the date period and display options to compare 2 years data together

### 2 Weekly Comparison



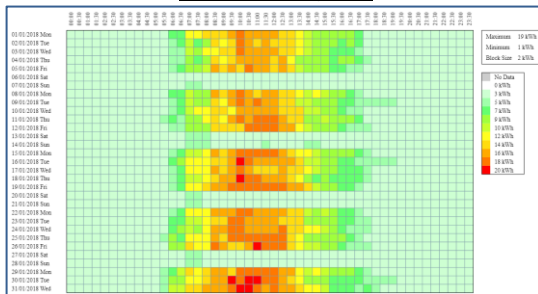
Comparison of 53 weeks against previous Best run in profile mode, date period and display options available

### Profile Summary



A graphical report showing either 5 weeks or a single month of profile data

### Profile Footprint



4 weeks or a single month of consumption scaled via colours (Heat Map)

### Profile Download

Report Options

Display Options

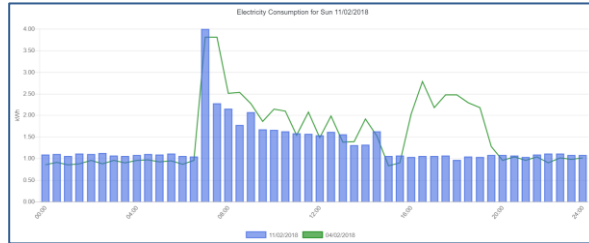
Download ▾

Download As Excel



Download profile data for the specified group and utility Report Options – No. of days, weeks, months or years Display Options - Values can be displayed horizontally or vertically in Excel

### 2 Day Comparison



Shows the selected day against the same day in the previous week

## Invoice Data

**Serial Number** 1234567  
**Location** Junior Block  
**Supplier** NPower

Usage  
Cost  
Estimate  
VAT  
CCL  
Meter 1  
Meter 2  
Meter 3  
Meter 4

Meter 5  
Meter 6  
Meter 7  
Meter 8  
Cost (exc VAT)  
Usage/Day  
Invoice Number  
Notes

Reports Invoice Data Direct Data

Search:

Columns Reset Save Cancel

	Date	Usage	Cost	Estimate	VAT	CCL	Meter 2	Cost (exc VAT)	Usage/Day	Invoice
+	28/03/2018	152459	19116.68	A	3186.11	776.02	621888	15930.57	4234.97	


A summary table of invoices lodged against this supply (most recent consumption period displayed first) will be accessible.

Customise your viewing by using the button on the right hand side and click save when you have your desired layout – such as Usage / Day for quick analysis.

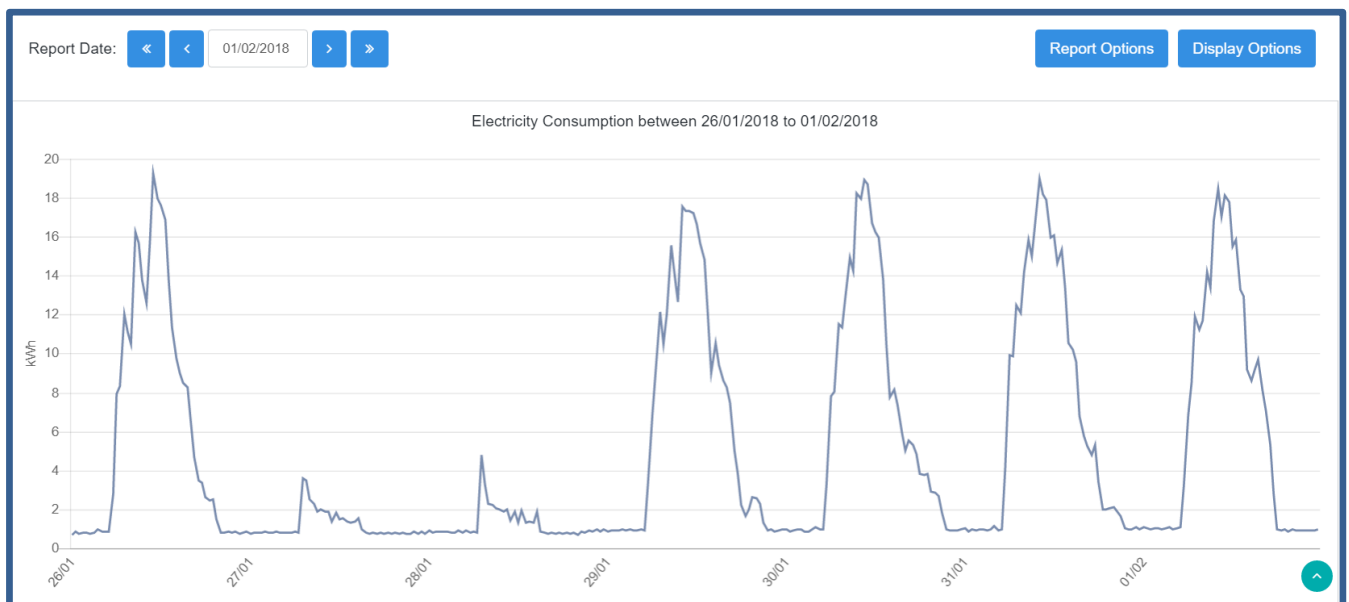
Select the icon for an invoice representation, listing all billable elements in a user-friendly format.

## Direct Data

Reports Invoice Data <b>Direct Data</b> Profile Data Exceptions 1								
Date	Usage	Cost	Meter 1	Meter 2	Usage/Day	Cost (exc VAT)	Notes	
31/08/2018	595488	0	7899	87687	54135.27	0		
20/08/2018	7548853	0	500000	98	160613.89	0		
04/07/2018	2812111	0	3005567	45678	2812111.00	0		

Direct Data is listed in a table format, just like invoice mode, you are able to customise the column displayed via the  button.

## Profile Data

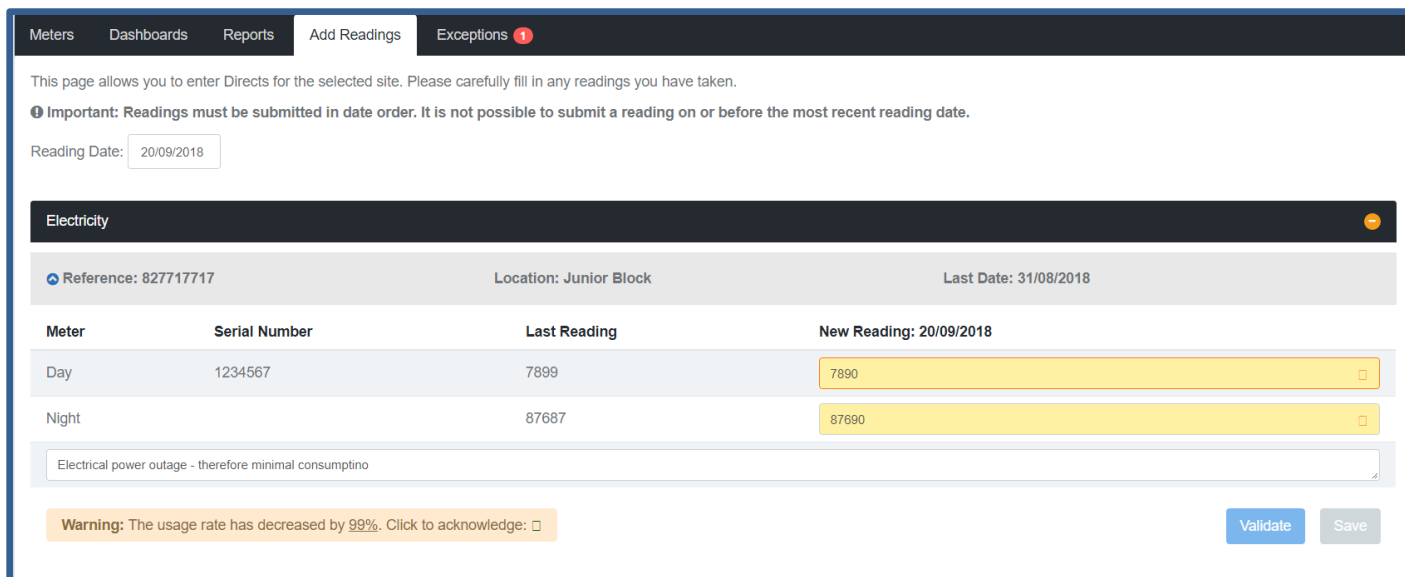


If the meter contains profile data, you are able to view the HH data at different levels;

- Report Options: 30 minutes or day
- Report Period: Day, week, 4 weeks, 53 weeks
- Display Options: Bar, Line or Area

# Meter Readings

The functionality for meter readings to be submitted, if enabled at [configuration](#) settings will undergo an initial [validation](#) check upon data entry.



Meters Dashboards Reports **Add Readings** Exceptions 1

This page allows you to enter Directs for the selected site. Please carefully fill in any readings you have taken.

**Important:** Readings must be submitted in date order. It is not possible to submit a reading on or before the most recent reading date.

Reading Date:

**Electricity**

Reference: 827717717 Location: Junior Block Last Date: 31/08/2018

Meter	Serial Number	Last Reading	New Reading: 20/09/2018
Day	1234567	7899	<input type="text" value="7890"/>
Night		87687	<input type="text" value="87690"/>

Electrical power outage - therefore minimal consumption

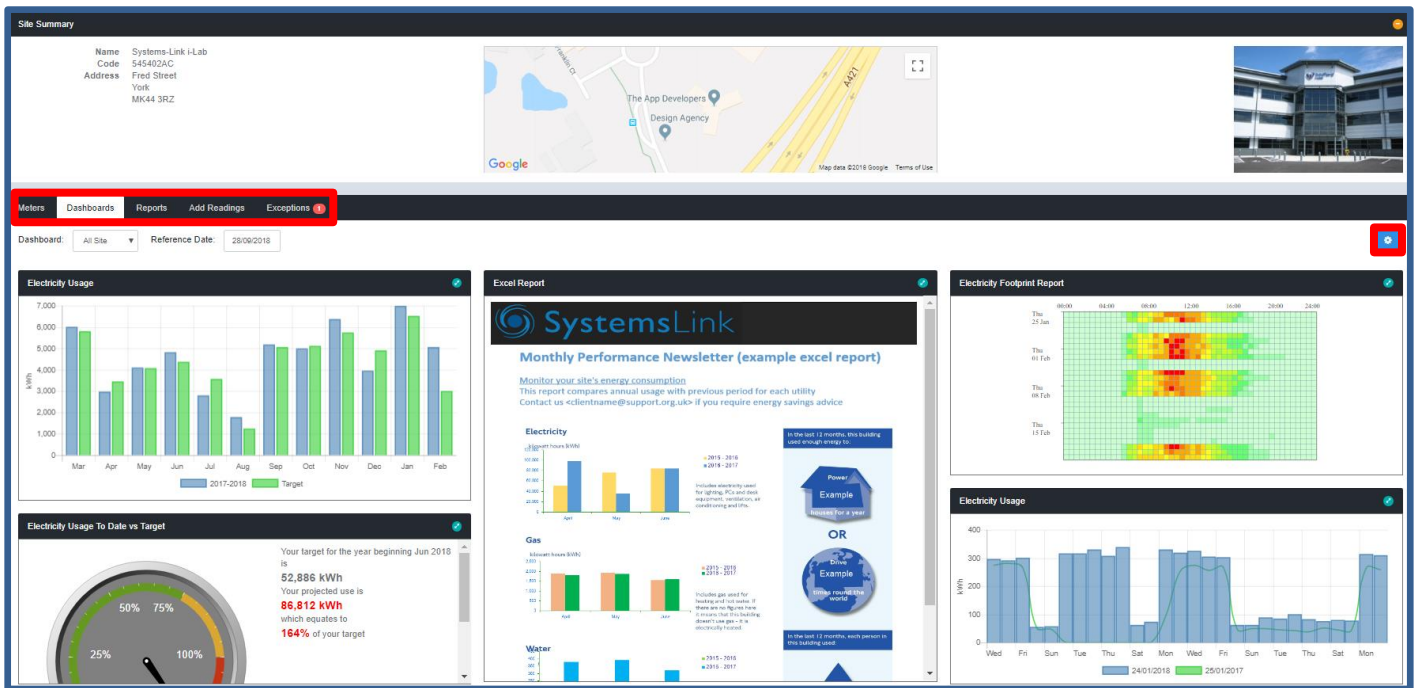
**Warning:** The usage rate has decreased by 99%. Click to acknowledge:

- Select 'Add readings'
- Your meters will listed and their readings can be populated individually
- Today's date will be populated – Select the correct date if different
- Last meter reading date and values are displayed next to the new readings fields
- A free comments box is available for annotations or to identify changes that require action
- Click the validate button to run a preliminary check
- You will need to acknowledge each reading before selecting 'save' to submit these

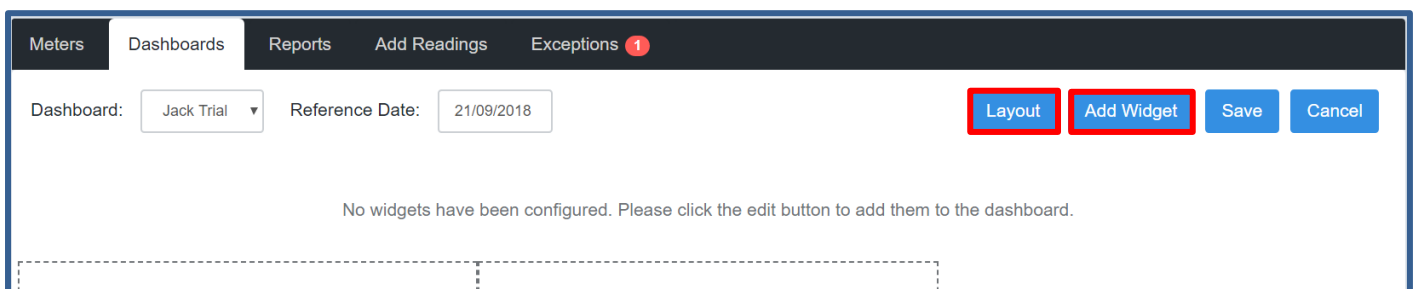
Once you entered and clicked 'save' on the readings, they are amendable within the Energy Manager application

# Dashboard

Our Dashboard function allows a snapshot summary of the selected site's data through the medium of customisable widgets. An example of dashboard is set out below, you can create as many Dashboards as you see fit



To configure your Dashboard click the settings button (top right), which will then display the following options



## Layout

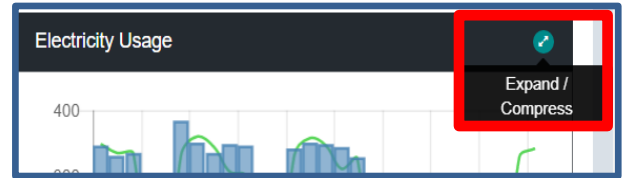
You are able to amend to the layout of the dashboard to feature a variety of columns, vertical and horizontal

## Add Widget

Here you can enter additional widgets and resize at will, a full list of widgets can found [here](#)

Once you are happy with the layout, please ensure you **click save**, so the format is live for all users

Widgets can be expanded and collapsed to allow full screen viewing – use the green arrowed button at the top right of the widget



### New Features:


Some widgets are interactive – such as the HH Drill Down to view the chosen day's 48 HH intervals

Hover over the charts to display their values



# Appendix A Widgets

## Widget list and configuration

Each Widget has a set of configuration options, select your widget and click on the spanner icon  to define your parameters, dependent on the widget this includes

**Title** – Re-name your widget so users understand them

**Units** – kWh, Cost, m<sup>3</sup>, £, kg, CO<sub>2</sub> (emissions factors based on your CO<sub>2</sub> groups within Energy Manager)

**Data Source** – Choose between Invoice, Direct, Profile and some widgets can utilise a Best of Data hierarchy

**Utility** – Select Gas, Electricity, Water, Solid: Waste or your custom created utilities

**Date Period** – Dependent on the widget options it can be rolling or fixed, reference year selection for comparisons

**Chart Type** – Choose between, bar, line, area or a combo

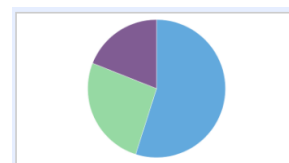
**Data Set Groups** – Some widgets can amalgamate data for a chosen Data Set group

**Data Accrual** – You can define an accrual method (standard or using Targets set in Energy Manager)



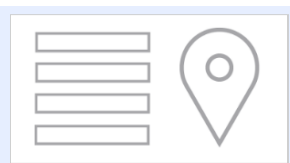
**Target Comparison Gauge**

A gauge displaying any unit in relation to their target with accrual and projected usage



**Utility Comparison Chart**

A pie chart displaying any unit for specified utilities at the site – ability to add values



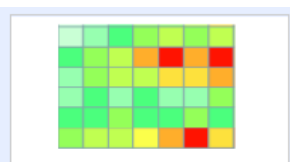
**Site Details**

A summary of your site details including location



**Target Comparison Chart**

Units against the targets



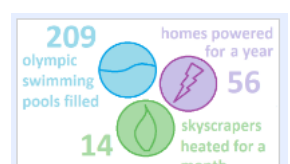
**Footprint Report**

A heat map of Half-Hourly (HH) consumption



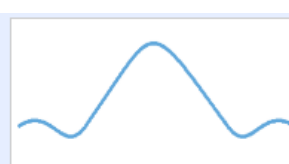
**Site Picture**

Displays a picture for your site



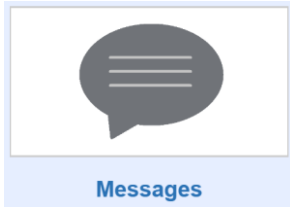
**Consumption Equivalent**

Insert a graphic to highlight consumption/cost/CO<sub>2</sub>



**Two Week Profile Comparison Chart**

Choose your own image and factors alongside free text  
Such as “Electrical cars around the World 17times”



**Messages**

A free text box to display targeted messages to your users  
“Switch off Week”



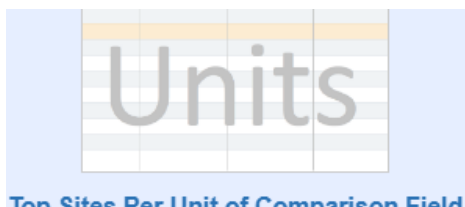
**Excel Report**

A powerful widget that allows you to upload a custom built Excel report to be displayed as a widget through your Dashboard



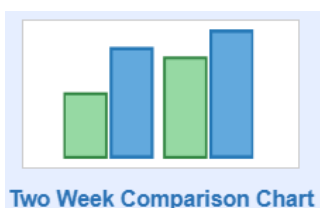
**Four Week Comparison Chart**

A graph comparing Usage for a 4 week period in any given year with same period as the previous year  
**Added drill down functionality**



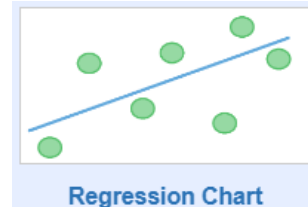
**Top Sites Per Unit of Comparison Field**

A report comparing units against a specified comparison field and between sites e.g. Floor areas  
This is a Site Group Widget



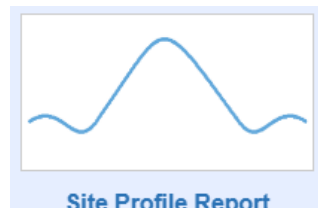
**Two Week Comparison Chart**

Comparing usage for one week period in any given year with the same period in the previous year  
**Added drill down functionality**



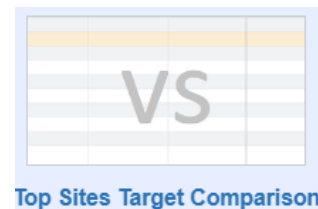
**Regression Chart**

To display the relationship between degree days and a chosen unit  
Identify those supplies relating to weather



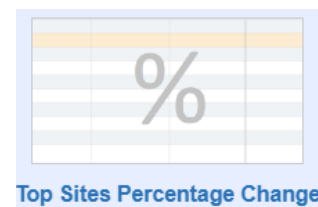
**Site Profile Report**

A 2 day by 30 min report – Compare your Day by Day consumption based on profile data



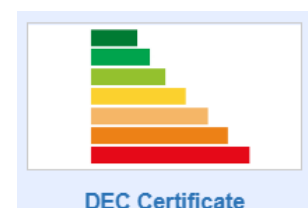
**Top Sites Target Comparison**

A report comparing percentage change in units against the target - between the sites themselves  
This is a Site Group Widget



**Top Sites Percentage Change**

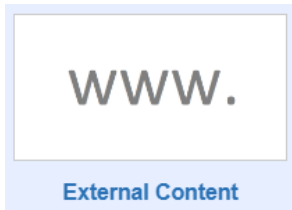
A report comparing percentage change in units between sites  
This a Site Group Widget



**DEC Certificate**

A chart comparing units for the current week against previous week. Great with HH or AMR data

If you have our OR Toolkit package a snapshot of the most recent DEC



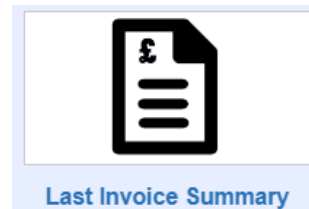
Enables external content to be displayed within the widget – Try adding your own homepage



A summary of the Smart Spaces exceptions for the last 30 days



Add a twitter timeline feed to your dashboard and keep people updated with the latest news and updates



A breakdown of consumption, date and costs of your invoices