

## Release Notes – eSight 2018.4

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### Before you Upgrade

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#### PRIVACY NOTE – Anonymous Usage Data Collection

eSight has been updated to include new background processes used to collect anonymous usage data for the sole purposes of better understanding how our customers use the product, and for collecting data when errors occur. Our product team will analyse this data to see which components of the software are most commonly used and how they are used. Our support team might use the data to establish a better context of a customer's eSight usage while evaluating a support ticket. This type and level of data collection is completely commonplace today as organizations seek to better understand how their products and services are being received.

Some examples of the type of data collected in eSight are:

- Types of import channels in use
- Configuration information such as whether active periods are configured or if MVLR models are used
- Logon durations in various areas of the product (all anonymized)

No data is shared outside of eSight Energy and is solely used for the stated purposes above.

The End User License Agreement (EULA) in eSight has been updated accordingly:

*"The Software tracks anonymous usage data of the Software to improve the user experience, and by use of the Software you consent to the collection of this information. The Software also tracks Software failures for the purpose of product improvements. All information collected is used exclusively for product improvement and customer support purposes and is not shared with other parties."*

### Enhancements & New Features

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eSight 2018.4 contains several enhancements and new features, primarily focusing in the Project Tracking module.

#### Project Tracking – Report and Target Consumption, Cost, and Carbon Savings

Significant improvements have been made to how consumption, cost, and carbon emission savings are recorded in opportunities and how this rolls up for policy-level reporting. Previously when defining a policy in eSight, the policy would have to be defined as a particular type - either a consumption, cost, or carbon policy, and all associated opportunities would then be linked to one of these policies. While expected consumption, cost, and carbon savings could be captured for each opportunity, the reporting of realized and targeted savings for these was limited to the type of policy (only either consumption, cost, or CO2).

In eSight 2018.4 it is now possible to target and report on consumption, cost, and carbon savings interchangeably within a single policy, making it easier to report on all 3 metrics. When creating a policy, organizations can generate baselines for consumption, cost, and carbon and set savings targets for all 3. For organizations not interested in setting savings targets for cost or carbon (for

example), these can be left blank. However reporting on realized savings for all 3 is possible regardless.

Figure 1. Create a policy targeting consumption, cost, and carbon together

Consumption	Path	Meters	Baseline Value (kWh)	Adjusted Baseline Value (kWh)	Annual Consumption Savings (kWh)
	Industrial Company \ Boiler House	2	29,596,914 (98%)	29,596,914 98.36%	295,968 98.36%
	Industrial Company \ Chiller House	2	493,404 (2%)	493,404 1.64%	4,935 1.64%
			30,090,318	30,090,318 Savings Calculator	300,903
Cost	Path	Meters	Baseline Value (\$)	Adjusted Baseline Value (\$)	Annual Cost Savings (\$)
	Industrial Company \ Boiler House	2	3,745,474 (100%)	3,745,474 100.00%	28,091 100.00%
	Industrial Company \ Chiller House	2	0 (0%)	0 0.00%	0 0.00%
			3,745,474	3,745,474 Savings Calculator	28,091
Carbon	Path	Meters	Baseline Value (tCO2e)	Adjusted Baseline Value (tCO2e)	Annual Carbon Savings (tCO2e)
	Industrial Company \ Boiler House	2	5,668 (96%)	5,668 95.53%	29 96.67%
	Industrial Company \ Chiller House	2	265 (4%)	265 4.47%	1 3.33%
			5,933	5,933 Savings Calculator	30

Figure 2. Set baselines and targets simultaneously

As a good practice, it is recommended that most policies be configured to track consumption, cost, and carbon savings, even if the organization doesn't have official savings objectives for all 3. This allows for better and more flexible reporting.

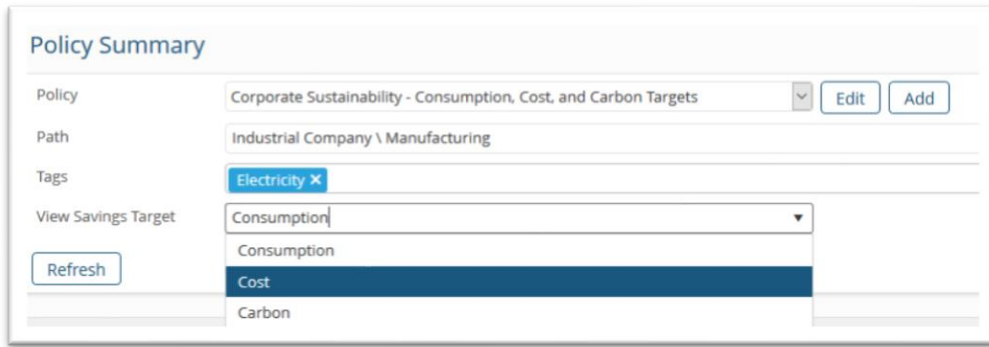


Figure 3. A comprehensive view of projects and progress against savings targets. Filter the Policy Summary dashboard to view specific opportunities (e.g. those affecting electricity) and savings progress against targets for a specific site or metric (e.g. cost)

### Project Combined Verification of Consumption, Cost, and Carbon Savings

Corresponding to the change described above, when verifying a project’s savings the verification page now displays expected, actual, and verified savings of all three metrics side by side (if the policy is setup to track all three). This enables users to gain a clear view of an opportunity’s impact on consumption, cost, and carbon side-by-side.

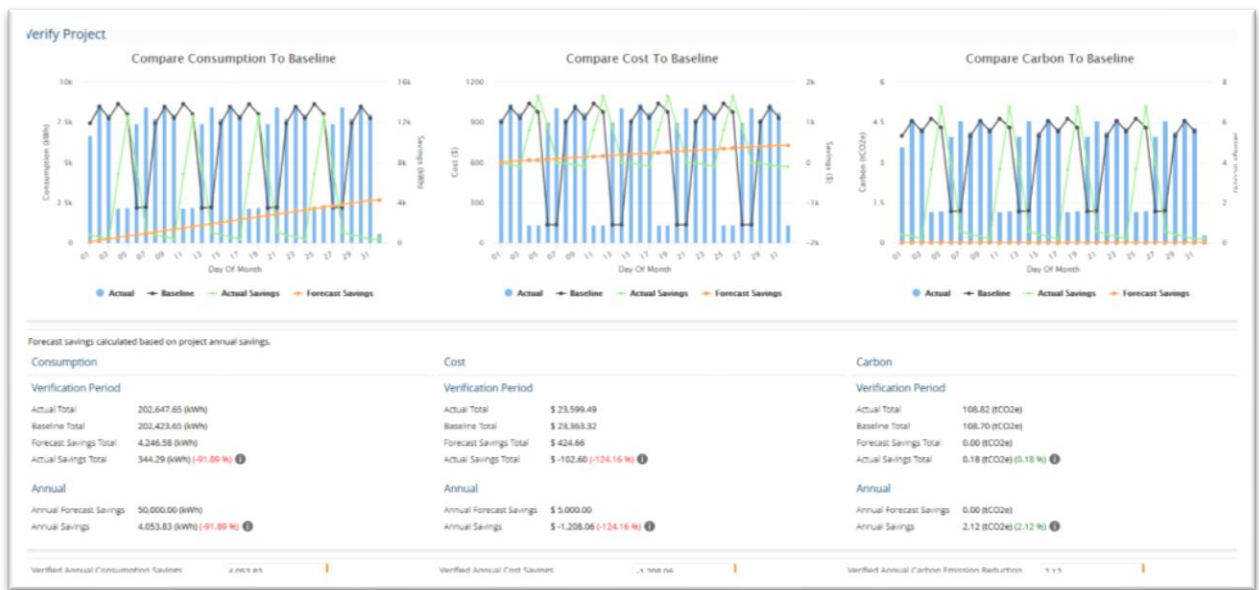


Figure 4. Verify consumption, cost, and carbon savings

One possible limitation is that all opportunities must be verified for all metrics, which presents a potentially undesirable extra step. For example a project linked to a policy with savings objectives for both consumption and cost must be verified for both consumption and cost.

One minor change in 2018.4 is the verified savings boxes are now automatically populated with the calculated annual verified savings, saving users the step from having to type it in.

In eSight 2018.5, the verified cost and carbon savings values will be automatically calculated from the verified consumption savings value which will make this process even easier.

### Policy Setup Method -Removal of the “Manual” Option

When defining a policy, prior to version 2018.4 there was a “Setup Method” parameter whereby the user would select from two options for populating a baseline value:

- “Manual” – a user simply entered a total baseline value.
- “Calculated from Baseline Period” – a user would enter a baseline period, one or more Tags (used to select the meters to be included in the baseline total), and a Grouping Level. eSight would then return the total value (either consumption, cost, or carbon depending on the type of the policy), and additionally split this total down based upon the policy’s “Path” selection and the specified grouping level. For example, this allowed you to break down the total baseline value into site or region levels. The user would then use the “Savings Calculator” to apply the specified savings percentage to the baseline values to work out a savings target breakdown. This method actually performed two tasks: getting the total baseline value and setting the total savings objective, as well as dividing these two values down to a level down (e.g. site level targets).

In eSight 2018.4 this setup method parameter has been removed and all policies shall be created using the formerly-labeled “Calculated from Baseline Period” approach. Refer to Figure 1 above.

This enables organizations to set site or region level savings targets if desired, or (by leaving the grouping level set to “total”) remain with a single organization-wide savings target.

Furthermore, coinciding with the change to support consumption, cost, and carbon savings targets in a single policy, it is now possible to establish site/region/etc level baselines and savings targets for consumption, cost, and carbon all together in one policy. This enables completely flexible reporting of savings at multiple levels across savings objectives.

### Policy’s Reporting Unit

A minor but important change has been made to the Policy definition page with the “Unit” field. Previously, for consumption policies, this field was used as a filter such that only meters having this unit of measure could be used in the policy and all opportunities had to have savings specified in this unit. Now this field is used as the policy’s reporting unit. Opportunities can now have meters with units of measure different from the policy’s reporting unit, so long as a conversion exists between the two units. The most common use case here pertains to energy policies spanning sites in different geographic locations using different units of measure locally. For example an energy policy’s reporting unit could be set to GJ and opportunities having units of KWH, therms, MJ, or any other energy unit could be created.

Note – the unit conversions must be within the same Measurement Type (e.g. energy to energy, volume to volume, etc). For example an opportunity having a meter with a unit of gas volume cannot be associated to a policy with a reporting unit in energy. This is not currently supported.

### Opportunity “Path” and “Meter” field consolidated

Based upon user feedback, the “Path” and “Meter” fields have now been combined into a single field. An opportunity can be linked to any object in the tree, depending upon the applicability of the measure or the availability of sub metering at the site. The only impact when selecting a path higher than a meter is that a meter must be selected at the time of verification if verifying the opportunity by a baseline period or MVLR produced predicted consumption.

### Improvements to Capturing Negative Savings and Financial Incentives

The Expected Savings tab on the Edit Opportunity page has been improved to make it easier to capture financial incentives and rebates, and itemize things that result in actual increases of consumption, cost, or carbon emissions (as in the case of combined heat & power installs for example).

The page has also been updated to more clearly visually differentiate:

- Savings from increases in consumption, cost, or CO2
- Financial costs from incentives or rebates

Any savings values or financial rebates are presented in **green text**, whereas financial costs or increases in consumption, cost, or carbon are presented in **red text**.

Type	Description	Amount	Funding
One Off	initial purchase	50000	CapEx budget
Annual	maintenance agreement (level 3)	1500	Ops budget
One Off	State of CA Rebate	-5000	State of CA

Type	Description	Amount
Annual	at \$0.10 / kWh	5000

Unit: Kilowatt Hour (kWh)

Type	Description	Amount
Annual		50000

Type	Description	Amount
Annual		10

Figure 5. Clearly identify costs vs incentives

### Auditing in Project Tracking

Project Tracking has now received end-to-end auditing to support compliance requirements. Everything from opportunity edits of expected savings values to project status changes are now fully auditable using eSight’s standard Audit Log page.

### Extended Policy Lifetimes

Policy lifetimes can now be as long as 30 years (previously limited to 10 years). This enables ESCOs to better report on savings measures over long periods of time.

Additionally the Policy Summary dashboard page has been updated such that the left graph can now be viewed in a focused 5 years view. or toggled to view the entire policy lifetime (when clicked to expand).



Figure 6. Click the graph to expand the view and toggle between a "5 Years" view and the full policy lifetime.

### Opportunity Analysis – View Projects in Any Status

The Opportunity Analysis has been updated to enable viewing of opportunities/projects in any statuses. In addition to determining which opportunities should be moved forward and implemented as projects, the graph is useful for analyzing and comparing the value of implemented projects, e.g. for the intent of deciding which to implement at other locations.

### Projects Status Report

In conjunction with the changes to policies and supporting consumption, cost, and carbon in one policy, the Projects Status Report has been updated to reflect this.

### Quickset Alarms – Priority and Budget Deviation Alarms

Budget Deviation alarms can now be created using the Quickset page.

The Quickset Alarms page has been redesigned. Now the priority of alarms can be set on an individual quickset alarm basis, just like it can be done using the "full configuration".

Note – based upon selected filters, it is possible to view quickset alarms across a set of meters with varying priorities. If the user clicks save on this set of quickset alarms, the existing individual priorities of the quickset alarms will be overwritten by whatever the specified new priority is. To avoid this, filter by priority as well before saving the new quickset alarms.

The screenshot shows the 'QUICKSET ALARMS' configuration page. At the top, there are filters for Alarm Type (set to 'Range'), Path (International Brewing Company \ Germany \ Berlin Brewery \ Berlin Brewery Totals), Filter ([None]), Tags, and Priority ([None]). Below this is a table of meters with columns for Min, Peak, and Priority. A 'Range' section above the table shows '10' for Min and '250' for Peak. At the bottom, there is a 'Change Alarm Priority' dropdown set to '2 - High' and a 'Save Alarms for Meters' button.

Meters	Min	Peak	Priority
[Berlin Brewery Totals].[Electricity]	10	250	High
[Berlin Brewery Totals].[CO2]	10	250	Low
[Berlin Brewery Totals].[Water]	10	250	High
[Berlin Brewery Totals].[Waste Water]	10	250	Low
[Berlin Brewery Totals].[Natural Gas]	10	250	High
[Berlin Brewery Totals].[Brewed Beer - Final Gravity]	10	250	Low
[Berlin Brewery Totals].[Brewed Beer - High Gravity]	10	250	Low
[Berlin Brewery Totals].[Packaged Beer]	10	250	Low
[Berlin Brewery Totals].[Steam]	10	250	Low

Figure 7. Priorities can be set on an individual meter basis.

## Energy Analysis – New Options

Two new options have been added to the Energy Analysis page.

- Data can now be viewed as cumulative **and** non-cumulative trends together on one graph.
- Calculated meter readings can now be prorated, like regular meter readings.

## Facilities Dashboard Meter Gauge – New Lower Bounds

The meter gauge on FM Dashboards can now be configured with “caution”, “warning”, and “error” levels for both upper and lower bounds. This is useful for visualizing metrics like efficiency or power factor.

## New Import Driver for Biomass Calorific Values

Biomass CV values can now be imported. A new import type appears under the main list of import types on the Import Data page.

## Bug & Issue Fixes

(#ID 27065) Fixes issued with 'SystemService' UserId not being reported correctly.

(#ID 26916) When simple conversion was selected, incorrect multiplier was used.

(#ID 26962) Added ability to set meter rollover for dynamic templates.

(#ID 26826) Budgets configured as "Manual Amount" will now save down the budget total in the "Amount" entry so that when they next load up, the value is persisted.

(#ID 26969) Single Meter Analysis – Load Duration Curve now properly displays mouse-over text.

- (#ID 27035) Updated references to meter correction factor, to multiplier throughout the user interface. To be in-line with meter configuration changes.
- (#ID 26851) Fixed an issue whereby calculated meters could be set to cumulative in mass edit.
- (#ID 26952) Fixed: Added TLS 2.1 Support to Express Custom page links and ENVI corporate page.
- (#ID 27038) Fixed a “duplicate key” error on meter gauges.
- (#ID 27041) Fixed SetGroup web service call returning exception
- (#ID 26965) Dynamic Imports - Gas Invoice. Meter Factor wasn't being taken into account when calculating the Metered Gas Volume.
- (#ID 26950) Fixed: Project Tracking Policies / projects being orphaned when owner tree objects deleted
- (#ID 26966) Fixed: Showing note pins unsupported in Min - Max, Alarm Profile and Load Duration Analysis charts.
- (#ID 26992) Fixed: Express User Change password throws error
- (#ID 26985) Fixed an issue with relicensing.
- (#ID 27005) Fixed issue with Synapsys SPle driver not working.
- (#ID 26958) Resolved issue with images not appearing correctly on buttons for Express Analysis and Advanced grids.
- (#ID 25694) Fixed an issue in tenant billing where CCL was not being pulled through into bill.
- (#ID 26922) Edit low frequency meter readings issue resolved. Meters without a target per read value configured, now omit the difference percentage value, instead of 100%.
- (#ID 26935) Updated alarm configuration prevention values to handle decimal numbers.
- (#ID 26967) Resolved issue where site readings prompt for meter rollovers was not being shown.
- (#ID 26968) Issue resolved with regression analysis, now after initial run selected target lines are reflected in the analysis.
- (#ID 26993) Fixed the description provided in a site name error message.

## Known Issues / Limitations

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When verifying a project with its Path set to a level higher than a meter, it is necessary to select a meter before conducting verification. This is working as intended. However when the verification page is loaded, eSight will display the verification graphs but without “actual” readings until the user selects a meter. This may cause to some confusion. Please be sure to select a meter before starting verification.



## Currently in Beta

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The following features were first included in eSight 2018.1 and are available to customers participating in Beta testing. These features are intended for use by a limited set of customers for acceptance testing and are often not fully developed and may contain bugs. For information on participating in beta testing contact your account manager. Refer to previous Release Notes for more details:

- Performance & Savings Reporting – ***due for release in eSight 2018.6.***
  - Savings Reporting Options
  - Performance Contracts