

**NorthWrite - MBCx**

## **Quick Start Training Guide**

*The following pages are intended to guide new users to the WorkSite and provide the simple steps required to begin adding users, setting up notifications, viewing energy use and engaging in the Energy Savings Measure (ESM) implementation process. For a more complete training or explanation of specific functionality, please contact NorthWrite Customer Support.*



**NorthWrite**

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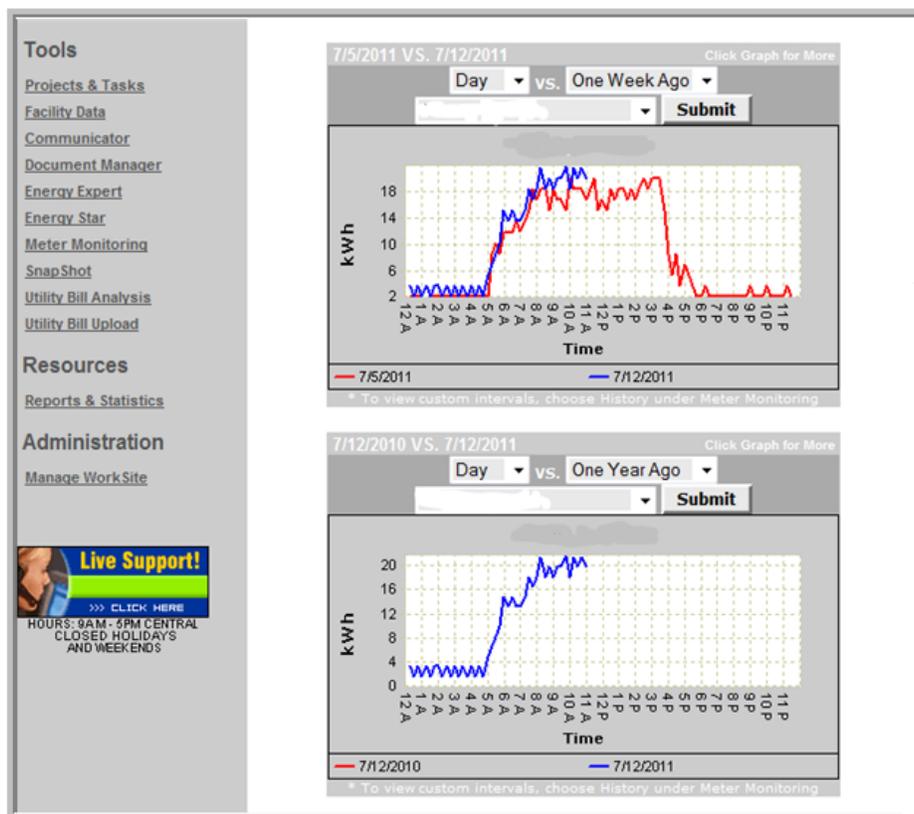
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## Getting Started

To login to the WorkSite, go to [www.myworksite.com](http://www.myworksite.com) and enter your user name and password.



## Dashboard View



The energy applications are found under the **Tools** menu

To add new users and set up notifications, go to **Manage WorkSite**

To open a live chat with NorthWrite Customer Support, click on the **Live Support** button

The Dashboard can be customized by clicking on the customize link at the bottom of the screen

## Add a New User

1. Select **Manage WorkSite** from the Administration menu
2. Select the **Users** tab
3. Choose the **Add New Account** button
4. Fill in the form (We suggest using email addresses for user names as each user name in our system must be unique. This also allows the system to send a “Welcome to MyWorkSite” email with login instructions to the new user. Make sure that the time zone is correct.)
5. Click **Submit**

The image shows a two-part screenshot of a web application interface. On the left is a vertical navigation menu with the following sections: **Tools** (Projects & Tasks, Communicator, Document Manager, Energy Expert, Energy Star, Meter Monitoring, Meter Monitoring, SnapShot), **Resources** (Reports & Statistics), and **Administration** (Manage WorkSite). A red arrow labeled '1' points to the 'Manage WorkSite' link.

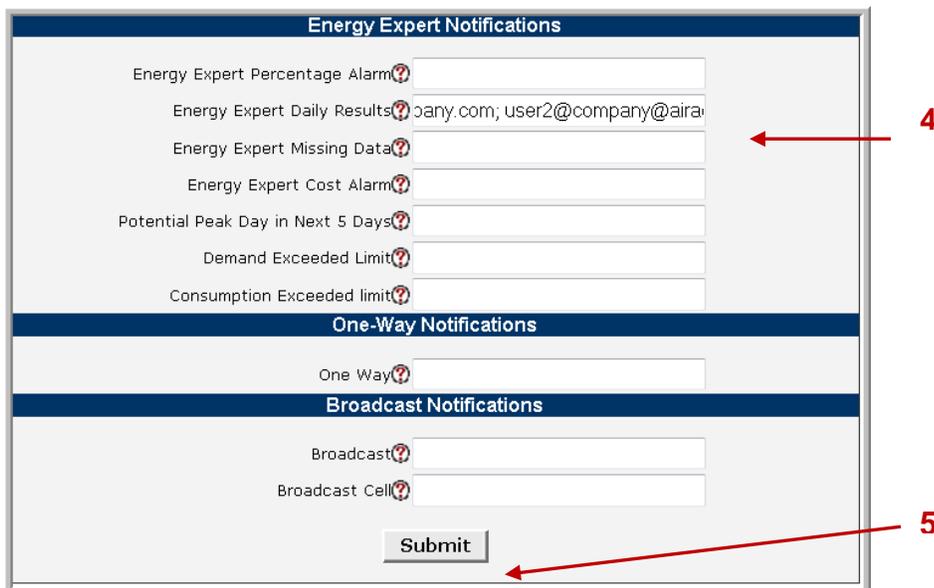
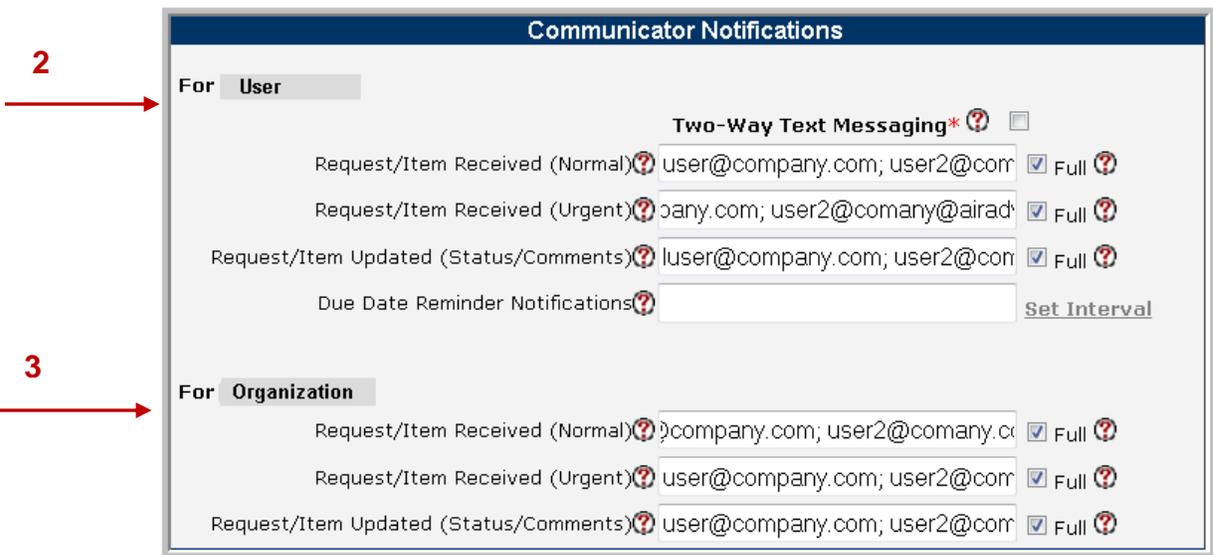
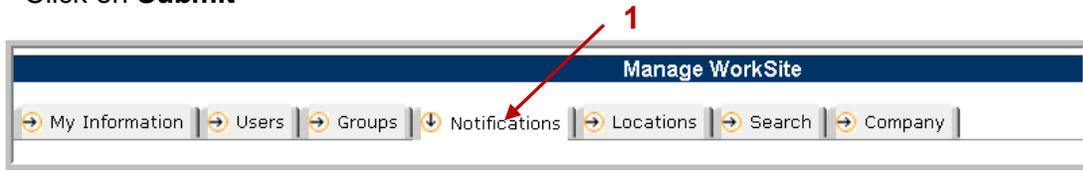
The main part of the screenshot is divided into two panels. The top panel, titled 'Manage WorkSite', has a navigation bar with tabs: My Information, Users (selected), Groups, Notifications, Locations, Search, and Company. A red arrow labeled '2' points to the 'Users' tab. Below the tabs is a text box explaining that users are individuals you can interact with via WorkSite Tools. Below this are two buttons: 'Add Network User' and 'New User Account'. A red arrow labeled '3' points to the 'New User Account' button. Below the buttons is a pagination link 'Page: 0-9 A-E F-J K-O P-T U-Z All' and a table with columns: My Users, User, Apps, Notify, Usage, Proxy, User, Organization, and Tenant/Department.

The bottom panel, titled 'Add User', is a form with the following fields: First Name, Last Name/Company Name\*, Email\* (with a note 'Default User Name'), Verify Email\*, Password\*, Verify Password\*, Phone(1), and Phone(2)/Mobile. Below these is a 'Time Zone\*' dropdown menu currently set to '(GMT-06:00) Central Time (US & Canada)'. There are three checkboxes: 'Check here for Labor Rates' (unchecked), 'Add User To Search' (checked), and 'Send Email Notification' (checked). A link 'What's This?' is next to the 'Add User To Search' checkbox. At the bottom are 'Submit' and 'Back' buttons. A red arrow labeled '4' points to the 'Add User' title, and a red arrow labeled '5' points to the 'Submit' button.

# Setting up Notifications

To ensure that the Energy Savings Measures recommended by the Analysis Team are implemented efficiently, the notification form of the WorkSite must be completed. This allows all members of the team to receive notification when any measures are assigned, updated or completed.

1. Select the **Notifications** tab within Manage WorkSite
2. Enter email address under the section with your name to receive the notifications specifically assigned to you
3. Enter email address under the section with the organization's name to receive all of the notifications for your organization
4. Enter email address under the Energy Expert section if you want to receive daily Scorecards
5. Click on **Submit**



## Viewing and Working with Energy Savings Measures

Once the Energy Monitoring baseline period, environmental monitoring and all surveys have been completed, a set of Energy Savings Measures will be entered into Communicator to track their progress. If notifications are properly configured, an email notification is delivered to inform the user the ESMs are available.

1. Select **Communicator** from the Tools menu
2. Click on the Item#, time or task type links to open the request

The screenshot displays the Communicator interface. On the left, a 'Tools' menu is visible with the following items: Projects & Tasks, Communicator, Document Manager, Energy Expert, Energy Sta..., Meter Mor..., Meter Mor..., and SnapShot. A red arrow labeled '1' points to the 'Communicator' item in the menu.

The main content area is titled 'In Process & Submitted Requests' and includes a 'Refresh' button. It shows 'You have 8 Items. Page 1 of 1' and 'Go To Page: 1 Print Page'. There is a 'Go To Item #' field with a 'Find' button and an 'Update Status' button. A 'Show/Hide Comments' link and an 'Items per page: 10' dropdown are also present.

The table below lists the Energy Savings Measures (ESMs):

Item#	Time	PC	Type	Status	By	To	Assigned	Location
<a href="#">2806407</a>	4/11/2011 4:57:00 PM		Scheduled Task Post energy conservation tips	In Process				
<a href="#">2806404</a>	4/11/2011 4:56:00 PM		Scheduled Task Install Energy Kiosk	Submitted				
<a href="#">2779682</a> NEW	3/30/2011 2:52:00 PM		Scheduled Task End of day building shut off	Submitted			None	
<a href="#">2779669</a> NEW	3/30/2011 2:44:00 PM		Scheduled Task Lighting Schedule Adjustment - D...	Submitted			None	
<a href="#">2779640</a> NEW	3/30/2011 2:29:00 PM		Scheduled Task Reduce % OSA	Submitted			None	
<a href="#">2779617</a> NEW	3/30/2011 2:17:00 PM		Scheduled Task HVAC Schedule Adjustment	Submitted			None	
<a href="#">2779583</a> NEW	3/30/2011 2:03:00 PM		Scheduled Task Temperature setpoint adjustment/...	Submitted			None	
<a href="#">2779529</a> NEW	3/30/2011 1:37:00 PM		Scheduled Task Lighting retrofit	Submitted			None	

A red arrow labeled '2' points to the 'Item#' column of the table, specifically to the item number 2806404.

Opening the work order item allows the user to update the **Request Status** and **Percent Done** fields, as well as attach files and/or add comments. Every time a change is made, it is time/date stamped by the user that made the change.

Work Order Details	
<input type="button" value="Update"/> <input type="button" value="Back"/> <input type="button" value="Print"/> <input type="button" value="Update/Print"/>	
<b>WO#: 2779682</b>	<b>Assigned To:</b>
<b>Task Name: End of day building shut off</b>	<b>Equipment:</b>
<b>Request Status:</b> Submitted	<b>Opened:</b> 3/30/2011 2:51:38 PM
<b>Request Type:</b> Scheduled Task	<b>Completed:</b>
<b>Priority:</b> Normal	<b>Edit Completed Date/Time:</b> <input type="checkbox"/>
<b>Priority Code:</b> None	<b>Due Date:</b> <input type="text"/>
<b>Submitted To:</b> Thomas Banks	<b>PO#:</b> <input type="text"/>
<b>Submitted By:</b> Company Admin	<b>Code/Invoice#:</b> <input type="text"/>
<b>Email:</b>	<b>Estimated Labor Hours:</b> <input type="text" value="0"/>
<b>Phone 1:</b>	<b>Labor Hours:</b> <input type="text" value="0"/>
<b>Phone 2:</b>	<b>Units:</b> <input type="text"/>
<b>Location:</b> South	<b>Cost (\$):</b> <input type="text" value="0"/>
<b>Location Contact:</b> Doug Stevens	<b>Billable:</b> <input type="checkbox"/>
<b>Contact Phone:</b>	<b>Percent Done:</b> N/A
<b>Attach Files:</b> <a href="#">Weekday average operation - Energy Expert.png</a> <a href="#">Liftech Analysis.docx</a>	<input checked="" type="checkbox"/> Check if Task is Energy Savings Measure <input checked="" type="checkbox"/> Enter Cost/Savings Estimates
	<b>Est. Annual Energy Savings</b> <input type="text" value="3041"/> \$
	<b>Est. Annual Consumption Savings</b>

# Meter Monitoring

1. Select **Meter Monitoring** from the tools menu
2. If monitoring multiple points, select the desired meter from the dropdown menu
3. Click directly on the graphs and an expanded version of the graph with more detail is displayed
4. To change the period for comparison, click on the calendar icons to change the dates and click on **Submit**

**Tools**

- Projects & Tasks
- Facility Data
- Communicator
- Document Manager
- Energy Expert
- Energy Star
- Meter Monitoring**
- SnapShot
- Utility Bill Analysis
- Utility Bill Upload

**Monitors**

Monitor Selected: **Company A** Hide Default Graphs

None  
Company A  
Company A Gas Meter

**TODAY VS. ONE WEEK AGO** THIS WEEK VS. ONE WEEK AGO Click Graph for More

**Time** (kWh vs. Time)

**Day** (kWh vs. Day)

— Last Week — Today

— Last Week — This Week

Anchor Graph at Zero

Newer Period Total: **710 kWh**  
Older Period Total: **514 kWh**  
Change: **38.1%**

Newer Period Average Ambient: **76°F**  
Older Period Average Ambient: **74°F**  
Temp Change: **2°F**

Use arrows in upper corners of graph to scroll back and forth in time, or use date input fields below to customize

Older Period Start Date: **7/3/2011** Vs. Newer Period Start Date: **7/10/2011**  
Newer Period End Date: **7/17/2011**

**Submit**

**This Week Vs. One Week Ago**

**Print**

**Close Window**

1. Click on the meter name to establish alarm thresholds
2. Enter the high or low values in the Monitor Edit box and click **Update**
3. Click on the History icon to access your interval data, create basic charts of usage and export this data to Excel.

1

3

- Main Office Monitors								
Name	Location	Type	Last Read	Last Value	Alarm	History	Weather	Docs
Company A		R	7/13/2011 4:15 PM ET	6.6 kWh				
Company A Gas		R	7/13/2011 4:15 PM ET	0.0 CF				

2

### Monitor Edit for - Main Office

Monitor Name:

Monitor Description:

High Value:  High Alarm:  No  Yes

Low Value:  Low Alarm:  No  Yes

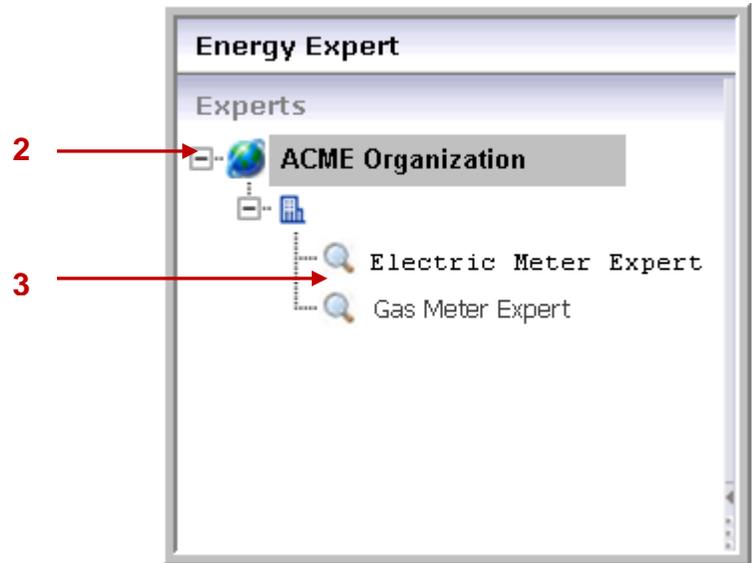
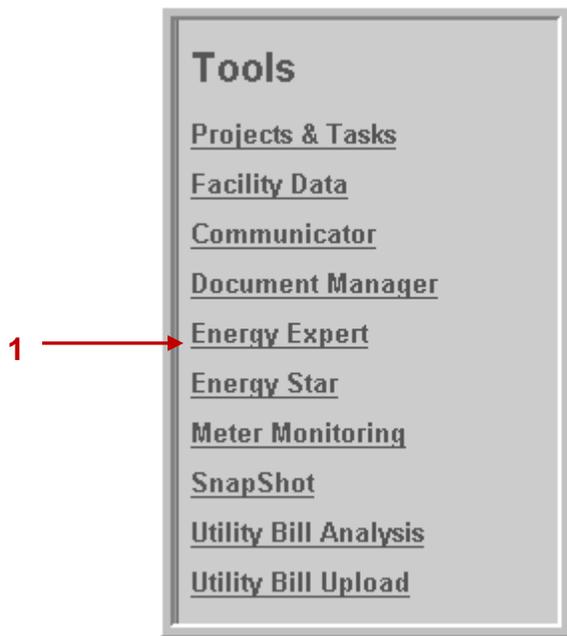
Parent Meter:

IMEI #:

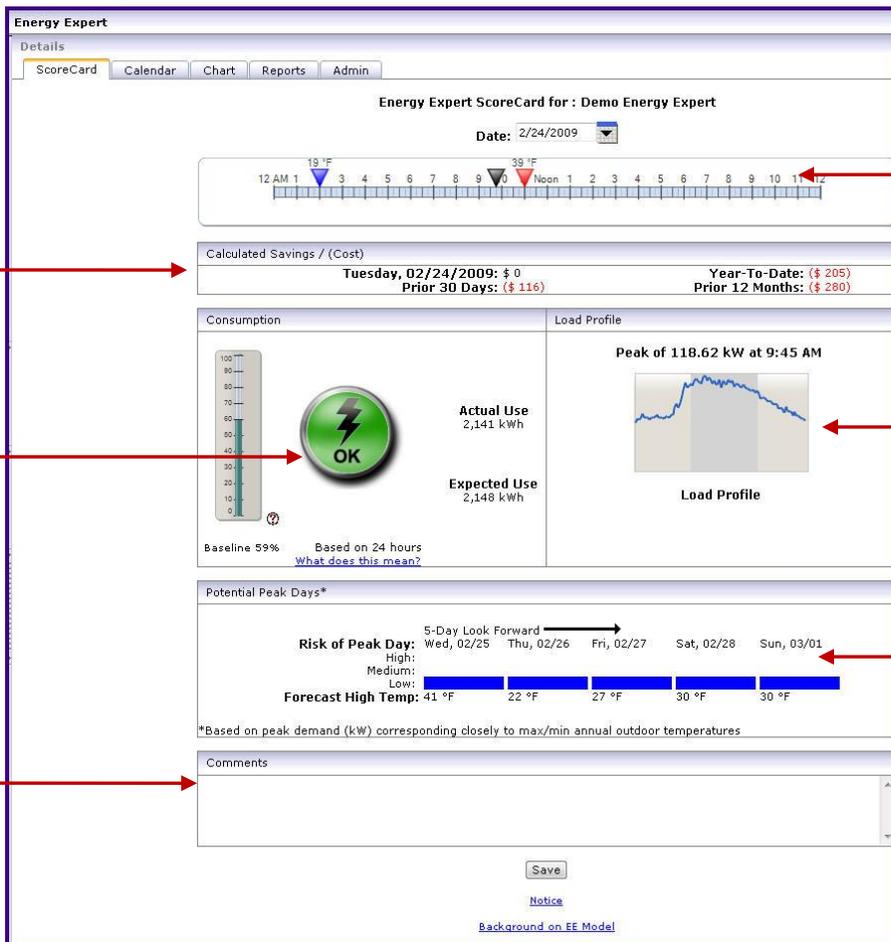
Enable Weather Feed:

## Energy Expert

1. Select Energy Expert from the Tools menu
2. Expand the tree diagram in the left panel to reveal all Experts
3. Click on the Expert's name next to the spyglass icon to see the Scorecard



# Scorecard Tab



Calculated energy savings/costs for the day and cumulative days

Actual and expected consumption values with corresponding color-coded box indicating high, low, or within expected range of energy consumption

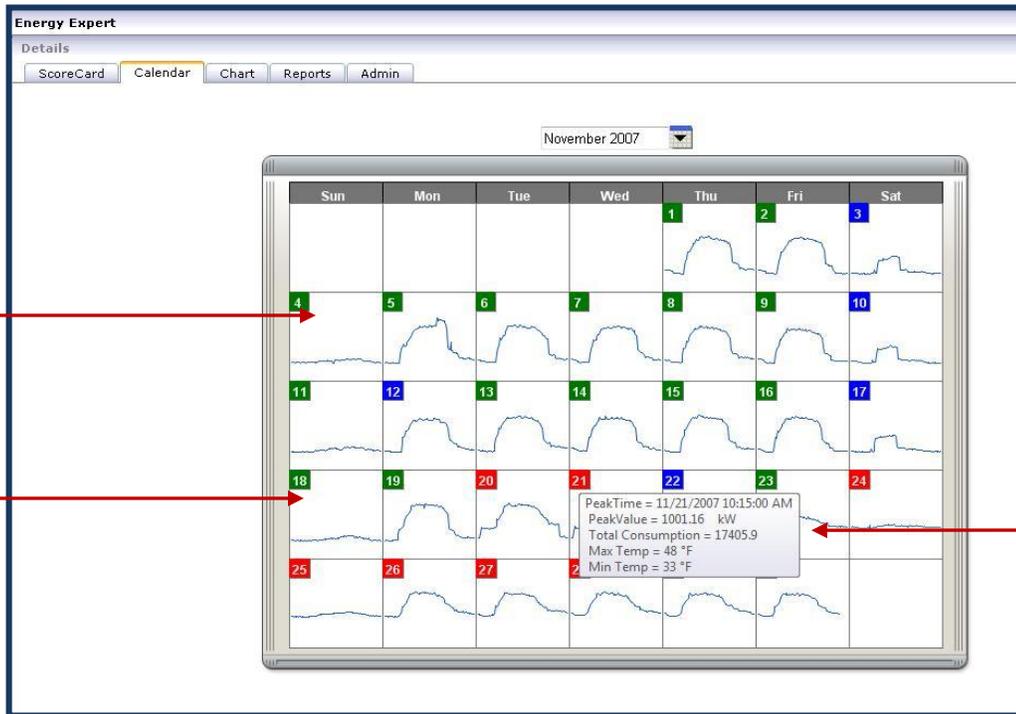
Comments box for recording explanation of data

Timeline at the top of the screen indicates when high/low temps occurred and when the peak electric demand occurred

Graph of energy demand over time with shaded area representing building occupancy

Five day forecast predicting potential for peak consumption days

# Calendar Tab



Summary of load profiles recorded for selected month; dates are color coded according to energy consumption levels as indicated on the Scorecard tab

Clicking on a particular date in the calendar navigates the user to a more detailed view in the Chart tab

Upon rollover, daily statistics appear providing peak time, peak value, total consumption and max/min temps.