



EcoStruxure Power Monitoring Expert (PME) – Elective Series Getting Started with Dashboards, Reports & Trends

The following document provides an overview of the above mentioned course offered by Schneider Electric's **Power Management University (PMU)**. For more details about all PMU courses such as availability, other courses options, and registration, please visit www.pmutraining.com. Questions can be emailed directly to pmu@se.com.

Duration:

- 6 hours (9 a.m. – 3 p.m. CT)

Delivery Type:

- Virtual Instructor Led (VILT) only

Overview:

- This virtual course focuses on the Dashboards, Reports and Trends sections of the PME Web Application. Students will learn how to navigate, create, edit, manage and even share the content within each of these applications.

Who should attend:

- Anyone who is responsible for accessing and analyzing real-time or historical data from PME system devices.

Prerequisites:

- A basic familiarity with using PME
- A reasonable understanding of Microsoft Windows operating systems

Upon Completion students will be able to:

- Create and modify entries within the Dashboards Library
- View both historical and real-time data using a variety of gadgets within Dashboards
- Create autonomous Slideshows to display Dashboards on a kiosk or smart device
- Create, run, and save reports to view historical data using a variety of report templates
- Create report subscriptions to automatically run specific reports at specified frequencies
- Create, manage, and view both historical and real-time data using a variety of options within the Trends Library.



EcoStruxure Power Monitoring Expert (PME) – Elective Series

Getting Started with Dashboards, Reports & Trends

Agenda:

- **Introduction of different data sources**
 - Provide a brief introduction to the various data sources that will be available when creating a new Dashboard, Report or Trend.
- **Introduction to the Dashboards tool within Web Applications**
 - Demonstrate Dashboard Library navigation and settings
 - Discuss view options and gadget types
 - Create visually aesthetic Dashboards utilizing different layouts and imagery
 - Manipulate and edit existing Dashboards to ensure proper historical data is displayed
 - Manage and share Dashboard data with Slideshows
- **Introduction to the Reports tool within the Web Application**
 - Describe the types of templates available within Reports
 - Create and run a Trend report
 - Create and run a Load Profile report
 - Create and run an Energy Cost report
 - Export historical data
 - Save a report for future use
 - Setup automated report distribution via email, file share or printer
- **Introduction of Trends tool within the Web Application**
 - Describe the types of trend options available
 - Create a trend that looks at historical data only
 - Create a trend that looks at both historical and real time data
 - Save a trend to the trend library
- **Course Summary**
 - Cover miscellaneous topics brought up during the course
 - Answer any remaining questions, provide any needed resources