solaredge

Application Note

Monitoring Platform Residential Site and Account Reports

Version 1.1

December 2024

Table of Contents

Revision History

Version	Date	Description
1.1	December 2024	Updated User Interface
1.0	October 2024	Initial version for Residential Monitoring, based on the same document for C&I

Monitoring platform site and account reports overview

The SolarEdge Monitoring platform enables you to generate reports to analyze your site's performance and compare different sites and inverters.

Reports

- **Site level**: provides information for individual sites, with some reports broken down into more detailed information, for example, insights into specific inverters.
- **Account level**: provides information for all sites within an account. These reports are displayed in a tabular format, with each site listed in a separate row.

Site level reports

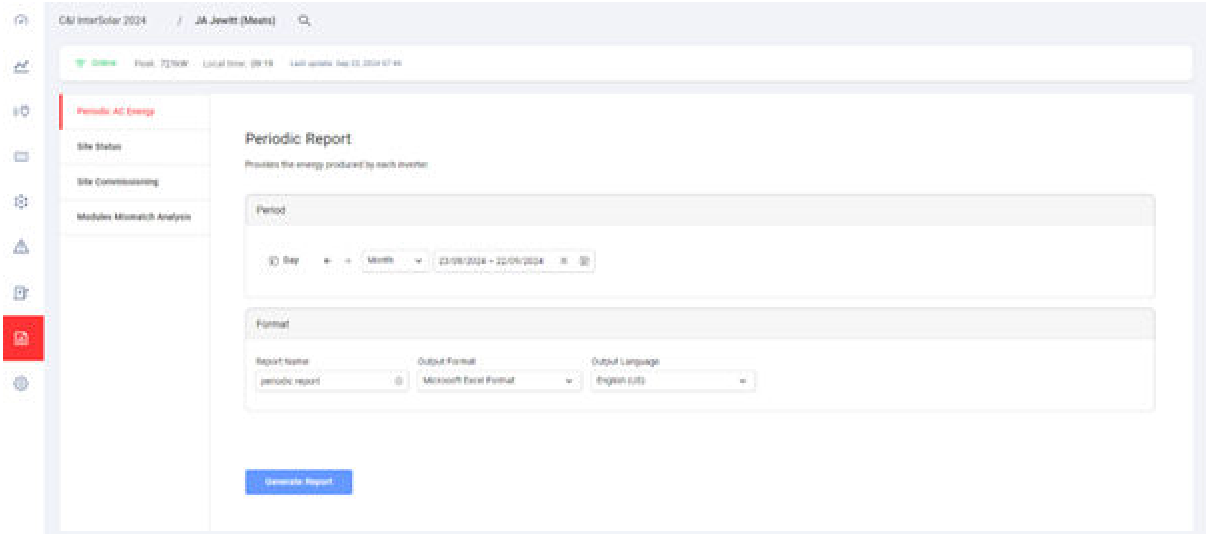
For single sites, you can generate several reports.

To open the Site dashboard:

1. Log in to the Monitoring platform.
2. To access your site, click the **SITE NAME**.

   The site dashboard is displayed.
3. Click .

   Reports is displayed



4. Select from the following report type:

- **Periodic AC Energy:** Displays the energy produced by each inverter on-site during a selected period.
- **Site Status**: Provides production, revenue indicators, and an alerts summary.
- **Site Commissioning:** Enables the installer to verify that all components are properly installed and configured, and communicating correctly. Select the **Performance Analysis** checkbox to display the Performance section and to display different information in the Inverters section, including Energy Management and Power Control Settings information.
- **Modules Mismatch Analysis**: Provides the data needed to identify underperforming modules by comparing each module's peak power and energy production to the site's average for all modules. For further information, refer to the Monitoring Platform Mismatch Analysis Report Application Note.

To generate a site-level report:

In **Period**:

1. Select one of the time periods listed, or customize your time period.

> **NOTE**
>
> Period is only displayed in Periodic AC Energy and Site Commissioning.

In **Format**:

2. Type the **Report Name**.
3. Select the report's **Output Format**.
4. Select the report's **Output Language**.
5. Click **Generate Report**.

The report is generated and automatically downloaded to your browser once completed.

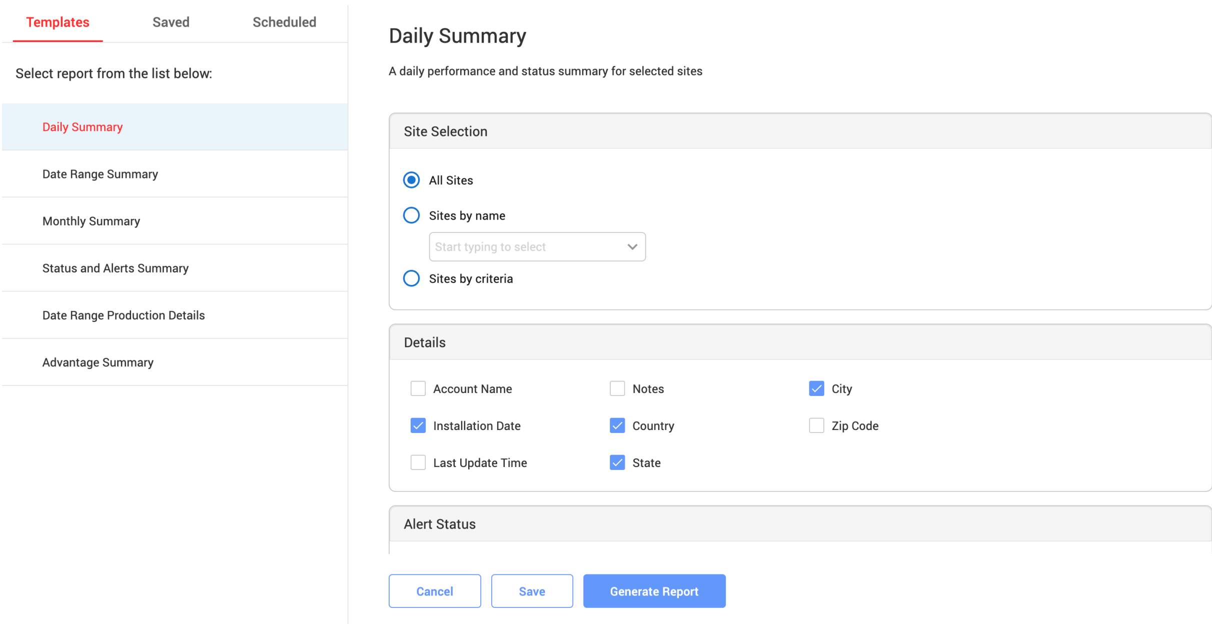
Account level reports

At the account level, you can generate reports for multiple sites.

To generate an account-level report:

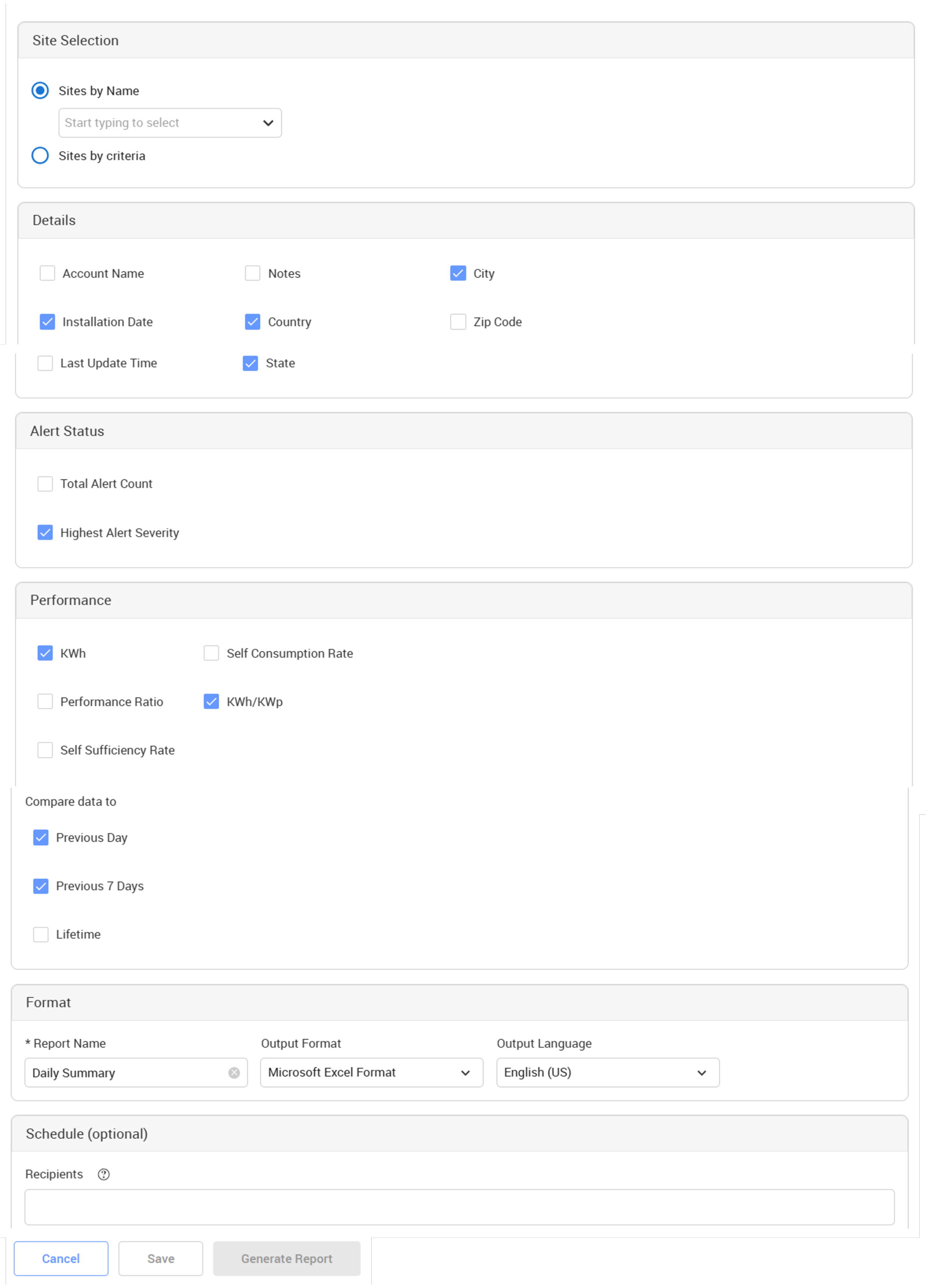
1. On the main dashboard, select **Reports**.

   Report **Templates** are displayed:



2. Select one of the following types of reports:
   - **Daily Summary**: Displays the performance of selected sites for a chosen day, along with data from the previous day and the past 7 days.
   - **Date Range Summary**: Displays the performance of selected sites for a selected period.
   - **Monthly Summary**: Displays the performance of selected sites for a selected month, including comparative data of the previous month and the same month in the previous year.
   - **Status and Alerts Summary**: Displays the current status and open alerts for selected sites. This report reflects the current status; no period selection is required.
   - **Date Range Production Details**: Displays the production information for selected dates.

   Depending on the report type the window displays some or all the following settings.



3. To select the sites to include in the report, set the following criteria:
   - **All Sites**: Select all sites under the account.

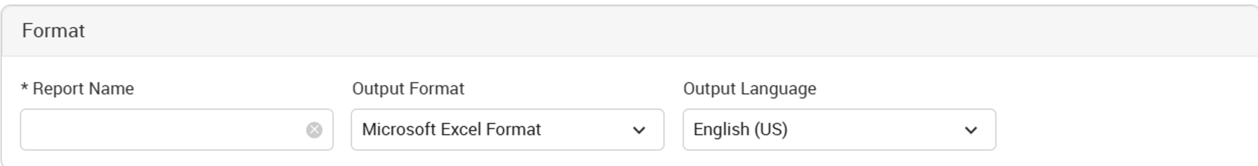
- **Sites by Name:** Type in the names of the sites to include in the report.
- **Site by criteria:** To include sites in the report, specify some or all of the following options:
  - Sites in a specific sub-account
  - Sites having specific text in their name
  - Sites located in specific countries, states (if applicable), cities or zip codes
  - Sites of a certain size in kWp
  - Sites having an alert of a specific severity or higher
  - Sites installed in a specific period
  - Sites having specific text in their notes field

For example, you can use the selection above to generate the following:

- A report of all sites with open alerts to help you plan maintenance activities.
- A report that compares sites in the same area by their kWh/kWp. You can automatically send this report to your analytics team every week.
- A report displaying the site's energy production and revenue. You can automatically send this report to the site owner.

To customize your report in Format:

Format fields are displayed in the following image:



NOTE

The following parameters are only displayed if sites are configured in the following ways:

- **Performance Ratio (PR)**: Displayed for sites with the required sensors installed to configure PR calculations.
- **kWh/kWp**: Displayed for sites with each inverter's kWp configured.

NOTE

Comparative data includes all the selected performance measures.

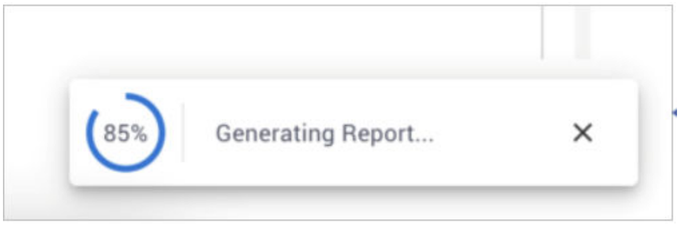
1. Select the report file format: Microsoft Excel, Adobe PDF or HTML.
2. Select the report language. The default is English.
3. Click **Save**, or click **Generate Report**.
   - If you click **Generate Report**, the report is generated.

   OR

   - If you selected the **Date Range Summary** or **Date Range Production Details** report, a **Generate Report** pop-up window is displayed.

4. In the **Date** field, select the report month.
5. Click **Generate**.

   A **Generating Report** pop-up is displayed.



When progress reaches 100%, the report automatically downloads.

Save an account-level report

Account-level reports can be saved to a shared **Saved Reports** list, accessible to all users within the account, allowing easy regeneration of reports. You can also schedule saved reports for automatic generation and distribution to a specific user list. Reports are generated at midnight, based on the account's time zone. When scheduling, you can adjust the time zone if the report includes sites in different locations.

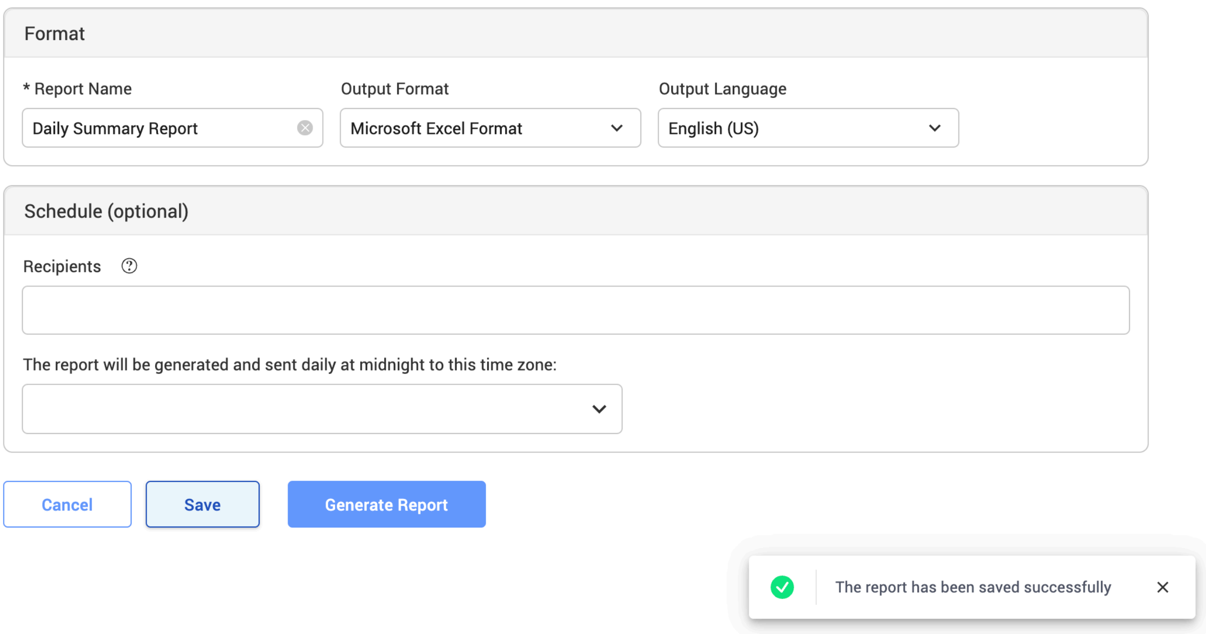
The following table lists the scheduling options for each report type:

Report type	Scheduling options
Daily Summary	Every day
Monthly Summary	Once a month. You can specify the day of the month to generate the report.
Date range summary (flexible dates)	No scheduling
Date range production details	No scheduling
Status and alerts summary	Select: **Send daily report at midnight.** Or **Send weekly report at midnight**, then select the day of the week to generate the report on. **NOTE** For daily and weekly reports, there is an option to send a report at midnight from a selected time zone.

To save and configure a report for automatic generation:

- In the **Report** window, click **Save**.

  The report has been saved successfully pop-up window is displayed.

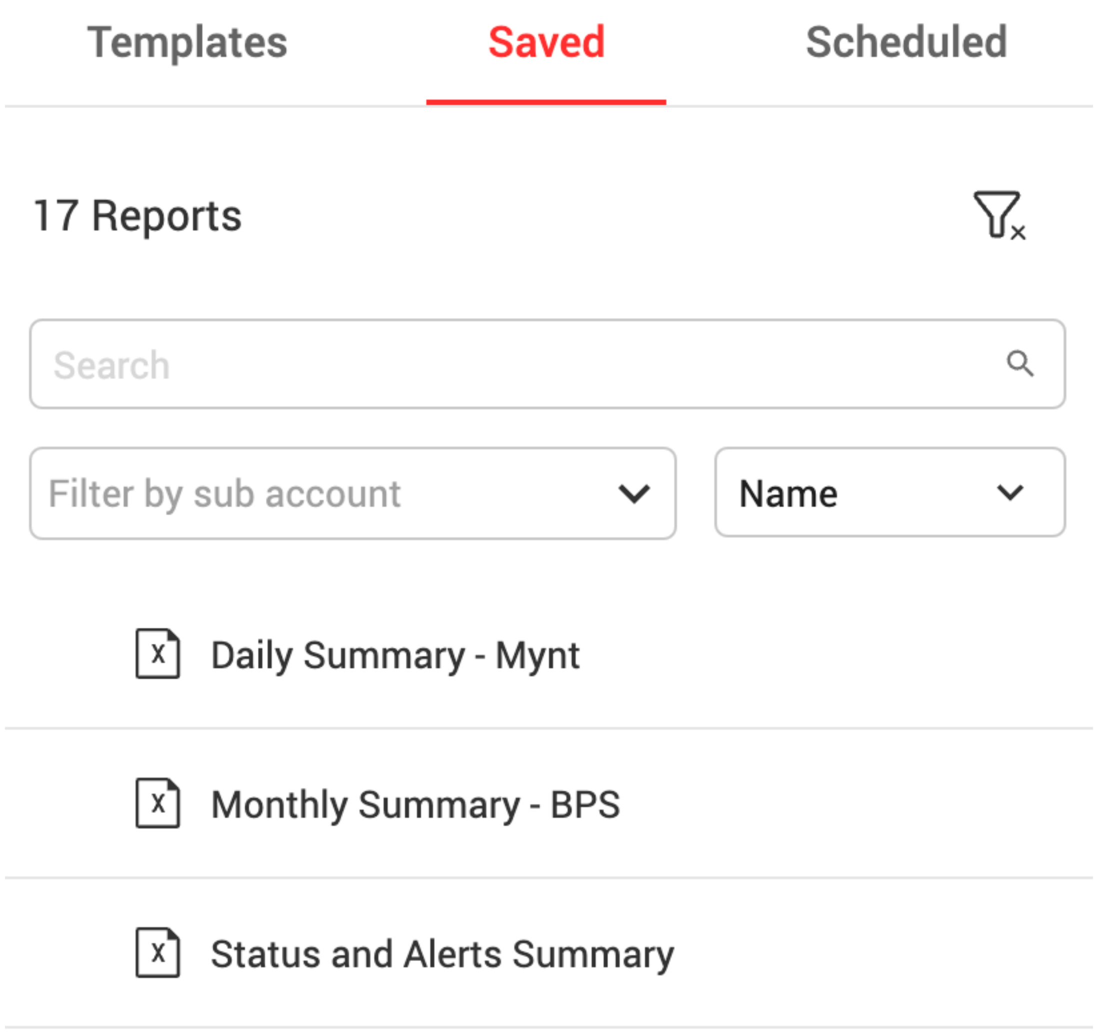


Your report can be viewed in your Saved reports list.

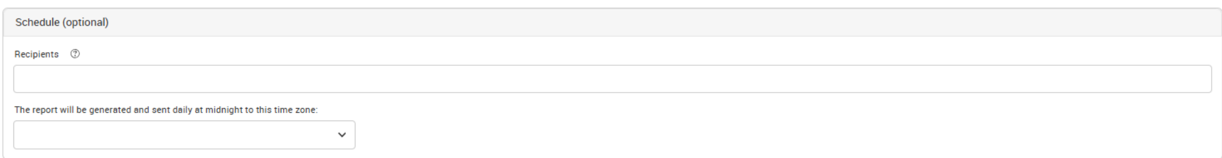
To select a report:

1. Click **Saved**.

   A list of reports is automatically displayed.



2. In the **Search** field, type the report name.
3. From the **Filter by sub account** list, select your sub-account.
4. In **Name**, select the name of the report, or from the dropdown, select **Format**, this displays the report in its previously saved format.
5. To clear the filters, click .
6. Optional. To automatically generate the report set the following additional information in **Templates** > **Schedule**:



a. Type in the email addresses of recipients to receive the report. You can add a maximum of 25 emails.

b. From the dropdown, select the time zone.

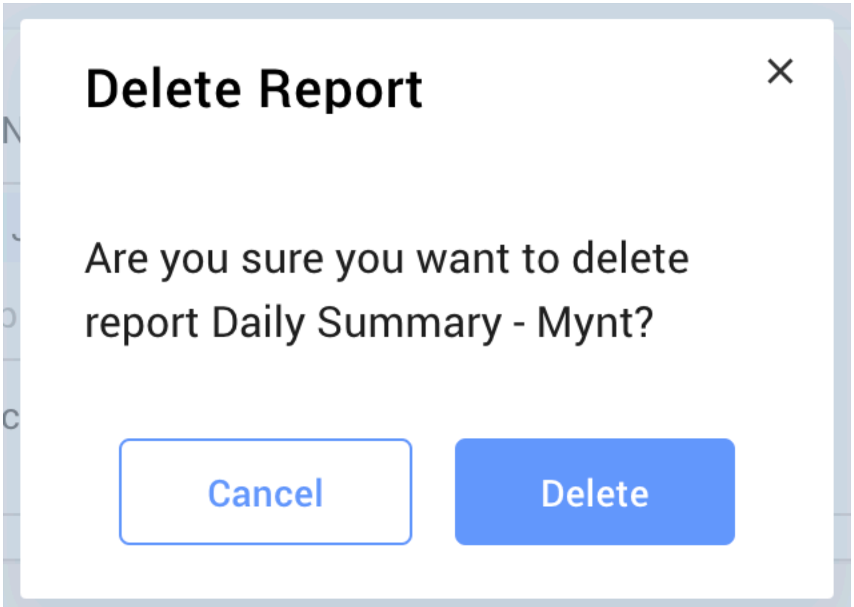
7. Click **Save**.

The report has been saved successfully pop-up window is displayed. Your saved recipients are automatically sent the report.

To delete a report:

1. In the **Report** window, click **Delete Report.**

A **Delete Report** pop-up window is displayed.



2. Select **Delete.**

Your report is deleted.

To edit a report:

1. In the saved reports list, click the report name and edit its settings in the **Reports** window. You can do the following:
   - Generate a report using your saved settings.
   - Add or remove your settings.
2. Click **Save.**

The report is saved and is displayed in your saved reports.

CAUTION

Reports may contain sensitive data, share them only with authorized users. Avoid emailing information to users who have not requested it.