

Monitoring Platform Residential Site and Account Reports – Application Note

Revision History

Version 1.0: November 2024: Initial version

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.

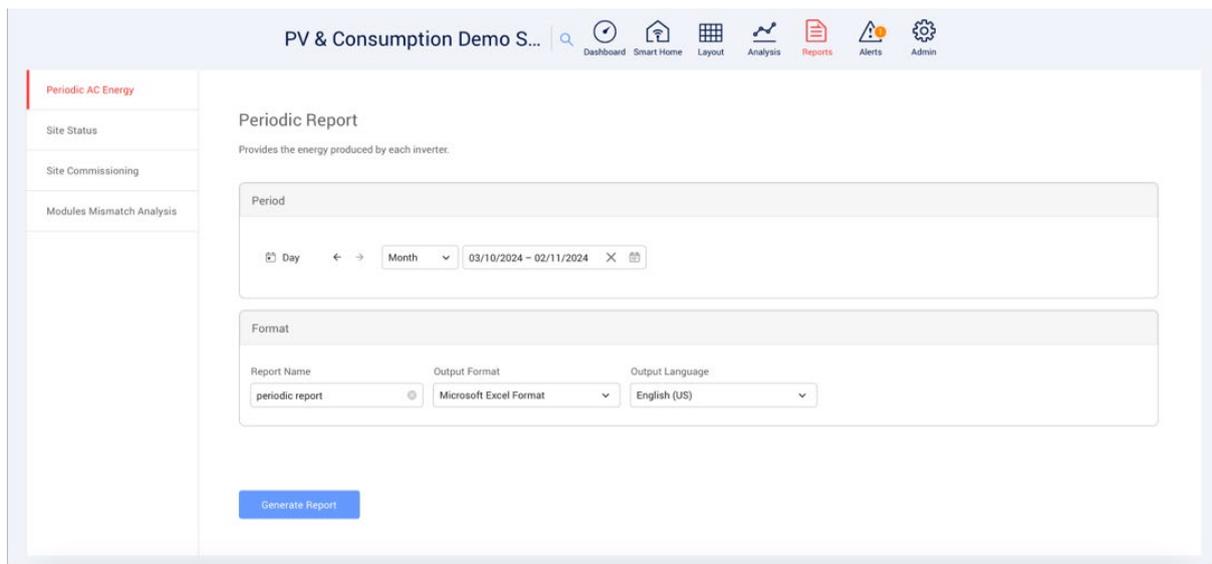
Site level reports

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



The screenshot shows the 'Periodic Report' generation interface in the SolarEdge Monitoring Platform. The page title is 'PV & Consumption Demo S...'. The navigation bar includes icons for Dashboard, Smart Home, Layout, Analysis, Reports (highlighted), Alerts, and Admin. The left sidebar shows a menu with 'Periodic AC Energy' selected, along with 'Site Status', 'Site Commissioning', and 'Modules Mismatch Analysis'. The main content area is titled 'Periodic Report' and includes the subtitle 'Provides the energy produced by each inverter.' Below this, there are two main sections: 'Period' and 'Format'. The 'Period' section has a date range selector set to '03/10/2024 - 02/11/2024'. The 'Format' section has three dropdown menus: 'Report Name' (set to 'periodic report'), 'Output Format' (set to 'Microsoft Excel Format'), and 'Output Language' (set to 'English (US)'). A blue 'Generate Report' button is located at the bottom of the form.

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.

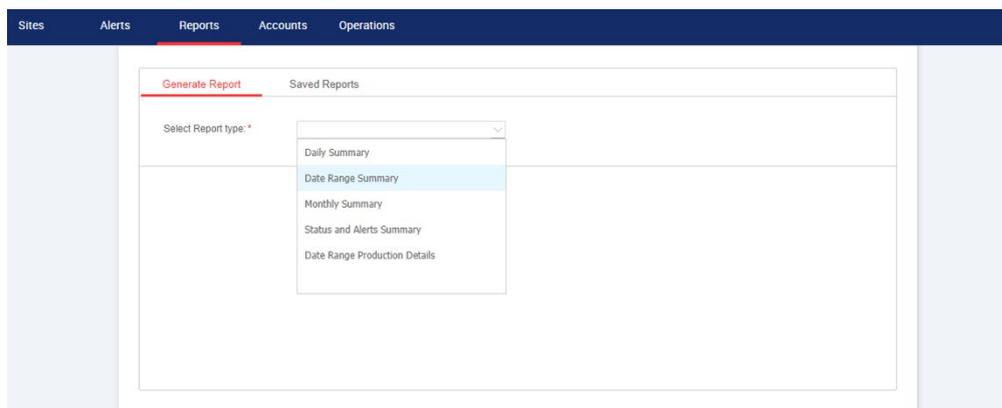
Account level reports

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

To generate an account-level report

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

Generate Report is displayed:



2. From **Select Report type**, select one of the following report types:
 - **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.
- The **Generate Report** window displays some or all the following settings, depending on the selected report type.

3. To select the sites to include in the report, set the following criteria:

- **All Sites:** Select all sites under the account.
- **Select specific sites:** Type in the names of the sites to include in the report.
- **Site 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 Output Options:

Output Options 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.
- **Revenue:** displayed for sites with their revenue calculation 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. By default, the report is generated in the language set in your profile. Alternatively, you may choose a different language.
3. Click **Generate**, or click **Save Report**.
 - If you click Generate, the report is generated
 - OR
 - You may need to provide additional information to generate the report, for example, the report's date range, as displayed in **Generate Monthly Summary Report**.

Generate Monthly Summary Report ✕

Generate report for: * Aug 2024
(08/01/2024 - 08/31/2024)

Cancel
Generate

4. Select the report month.
5. Click **Generate**.

The report is generated and displayed in a new browser window.

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 of each report type:

Report type	Scheduling options
Daily Summary	Every day
Monthly Summary	Once a month. You can set the day in the month when to generate the report.
Date range summary (flexible dates)	No scheduling
Date range production details	No scheduling
Status and alerts summary	Every day. Every week. You may select the day of the week to generate the report on.

To save and configure a report for automatic generation:

1. In **Generate Report**, click **Save As**.
Save Report is displayed.

Save Report

Name: *

Schedule Report Generation

Send to: ?

The report will be generated and sent daily at midnight according to this time zone:

Cancel
Save

2. Type a report **Name**. This name is used when searching the Saved Reports list.
3. Optional. To automatically generate the report, check the **Schedule report Generation** box, and set the following additional information:
 - Type in the email addresses of recipients to receive the report. You can add a maximum of 25 emails.
 - Select the time zone.
4. Click **Save**.

**CAUTION!**

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

Search for and edit your saved reports

All saved reports in your account, including sub-accounts, are listed in **Saved Reports**.

		Name	Account	Type	Format	
1		Account Name	Account Name	Monthly Summary	PDF	
2		Report Name	Account Name	Daily Summary	PDF	

You can search the list for the following:

- Search for a report by its name
- Search for reports of a specific sub-account

To edit the report:

Click the report name and edit its settings. For example, you can:

- Generate the report ad hoc
- Disable the distribution of a scheduled report
- Change the distribution list of a scheduled report