Generate Reports

Introduction

This guide describes how to create and customize many types of reports.

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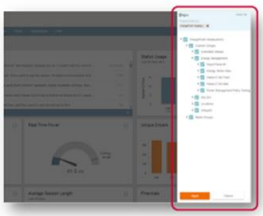
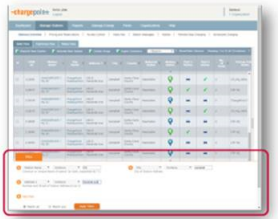
Report Filters

There are two ways to filter your data:

- Globally - applies to all pages
  (Right-side **Organization**)
- Locally - applies only to the current page
  (Bottom-side **Filters**)

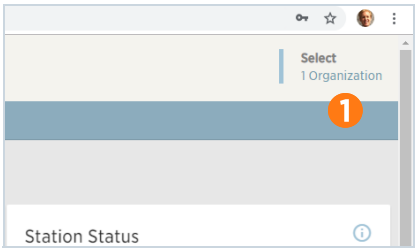




Global Filter

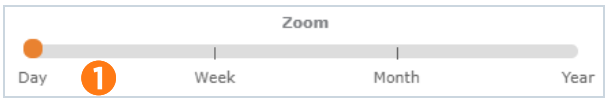
To apply a filter to all report pages:

1. Click **Organization** in the upper-right.
2. Navigate to and checkmark the entities to include in your reports.
3. Click **Apply**.

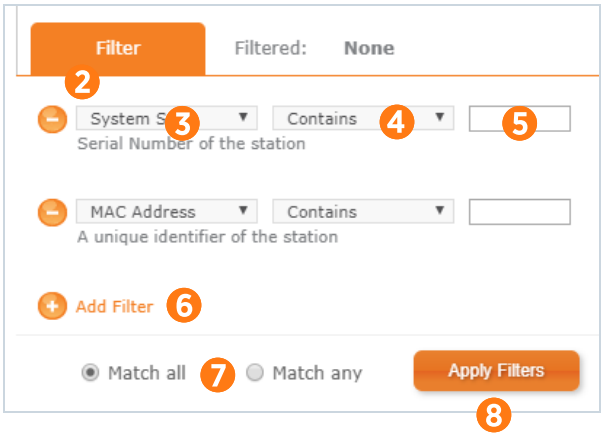


Local Filter

At the bottom of every report is a set of local filters that affect only the current page:



1. Click the **Zoom** slider to change the X-Axis grouping to be per *Day*, *Week*, *Month*, or *Year*.
2. Click **Filter** to maximize or minimize the group of filters
3. Select one of the fields to filter by.
4. Select how to compare your search text (5) to the filter field (3):
   - **Contains** your search text (5) anywhere in the filter field (3).
   - **Does Not Contain** your search text (5) anywhere in the filter field (3).
   - **Is** exactly equivalent between the filter field (3) and the search text (5).



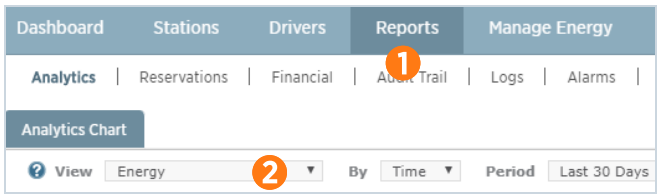
5. Enter your search text.
6. *Optional*. Click **Add Filter** to add an additional group of filter fields.
7. Click **Match all** if all of your search fields must match their respective search text.

   Click **Match any** if only one of your search fields much match its respective search text.
8. Click **Apply Filters** to see matching records.

Note: Not all filters are available in all reports. Check the local filters (bottom left) to see which filters are supported in the selected View.

Analytics Reports

Several analytics reports are available to help you monitor every aspect of your charging stations and their usage.



1. Log in to ChargePoint and click **Reports > Analytics**.
2. From the **View** dropdown list, select the report type you want.

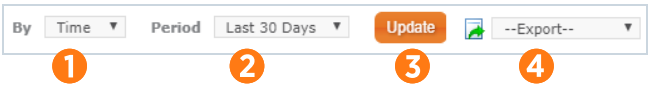
From the **View** dropdown, you can choose to generate the following reports:

Report / Chart	Description
Energy	kWh usage with Accumulated totals.
GHG Savings	Greenhouse gas savings in kg with accumulated totals.
Stations	Daily and accumulated number of stations activated.

Report / Chart	Description
Ports	Daily and accumulated number of ports activated.
Sessions	Daily and accumulated number of individual charging sessions.
Number of API Calls	Daily and accumulated API calls your Organization made to the ChargePoint Web Services API.
Organization	Daily and accumulated totals of organizations activated (of primary interest to channel partners).
Revenue	Daily and accumulated totals of revenue generated from stations through the ChargePoint Flex Billing service.
Peak Daily Occupancy	Daily percent of your chargers that were occupied at the peak portion of the day.
Session Length Histogram	Breakdown of charging session lengths by time and a cumulative percent each length of time occurred.
Unique Drivers	Number of unique drivers who used your station in a given time period.
Average Utilization	Average time your chargers were occupied over a specified time period.
Queue Depth	For Waitlist-enabled stations, the number of drivers waiting to use a charging station over the course of the day.
Peak Queue	For Waitlist-enabled stations, the maximum number of drivers who were waiting each day.
Wait Time	For Waitlist-enabled stations, shows the distribution of how long drivers waited until being offered a charging spot.
Session Details Table	A list of charging sessions that can be exported for further analysis.

Analytics Report Header

The Analytics Report Header applies to all Analytics Reports and is located above each chart with the following items:



1. **By** dropdown

   Selects your X-axis intervals:

   - **Time** (Days, Weeks, Months, or Years)
   - **Objects** (Stations, Groups, or Organizations).

2. **Period** dropdown

   Selects the time interval and has a **Custom** option to create your own time period.

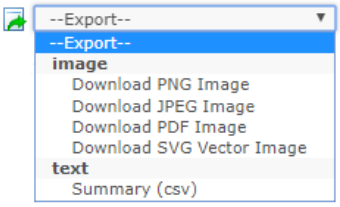
3. **Update** button

   Redraws your chart after you select options in steps 1 and 2.

4. **--Export--** dropdown

Lists formats to save the displayed graph or table as one of the following:

- an image file (*PNG*, *JPEG*, *PDF*, *SGV*)
- a text file (*CSV*).



Note: As soon as you click one of the formats, the file will be immediately downloaded to your *Downloads* folder.

Energy

The energy report shows how much electricity was output in aggregate across all of the stations.

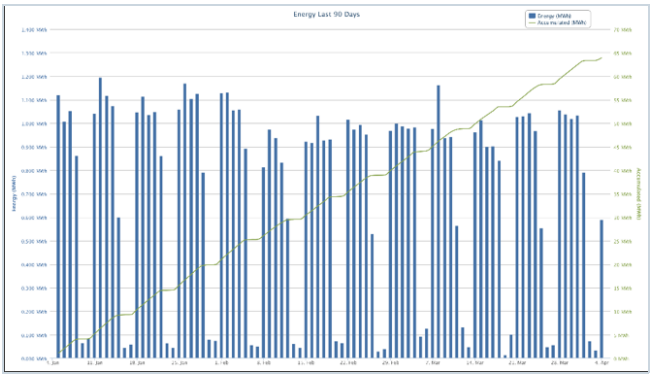
This chart is viewable as a time series:

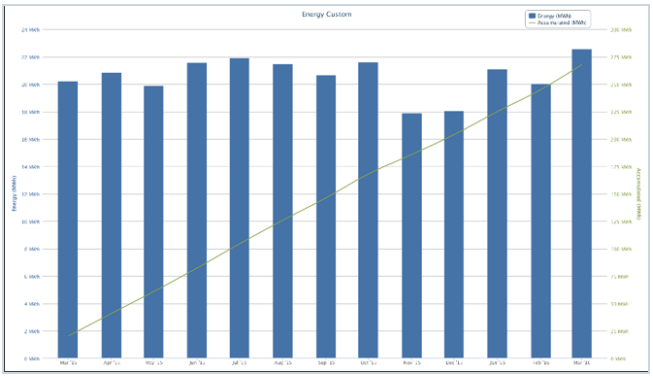
- By Day (shown in the top chart)
- By Week
- By Month (shown in the bottom chart)
- By Year

or by object:

- Station
- Group
- Organization

This is helpful to see a trend in Energy use (by Time) or which stations or groups are used the most (by Object).



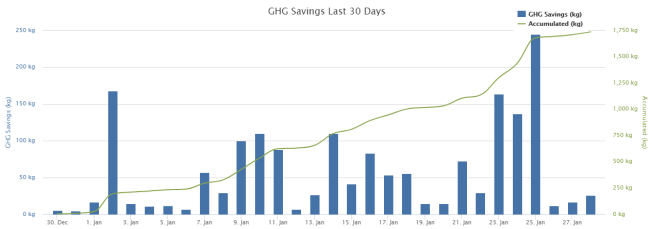


GHG Savings

The Greenhouse Gas (GHG) savings report provides an estimate of the GHG offset by allowing electric vehicles to charge.

The GHG savings report is based on national averages.

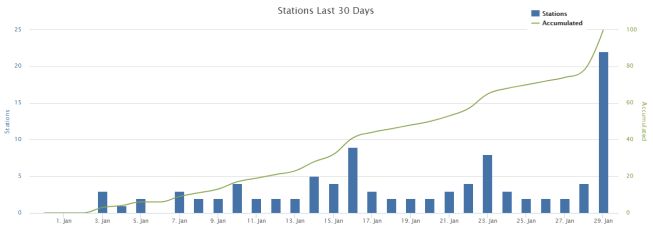
For more details, see the FAQ entry at www.chargepoint.com/faq.



Note: ChargePoint has updated its emissions calculations to more accurately reflect GHG emissions savings based on new data from various environmental agencies in North America and Europe. The change reflects the growing use of clean energy sources in the electrical grid. Effective Jan. 29, 2021, organizations will see an increase in their GHG emissions saved with EV charging. Historical data before that date will not change. Contact ChargePoint Support if you have further questions.

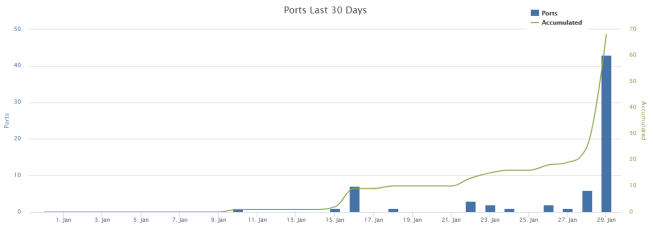
Stations

This chart shows a history of when your stations were activated.



Ports

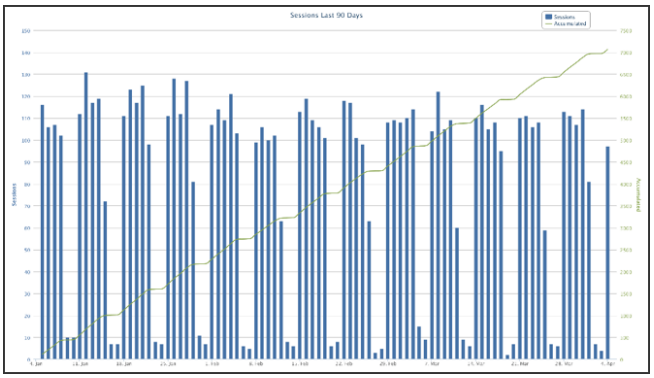
This is similar to the Stations chart but counts ports rather than stations (some stations have two ports).



Sessions

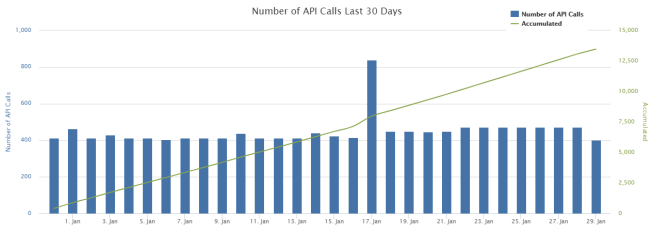
The Sessions report shows how many plug-in events occurred across all of the stations.

Every time an EV driver plugs into a station, it is counted as a plug-in event.



Number of API Calls

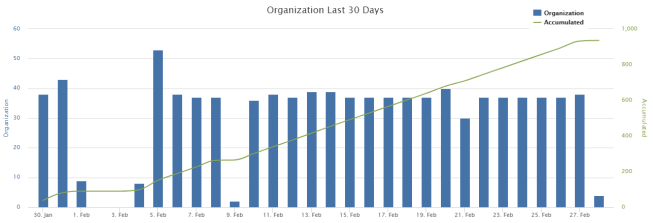
This graph shows daily and accumulated API calls your Organization made to the ChargePoint Web Services API.



Organization

This chart shows daily and accumulated totals of organizations activated.

This is primarily of interest to channel partners to see the trends in adding new customers.

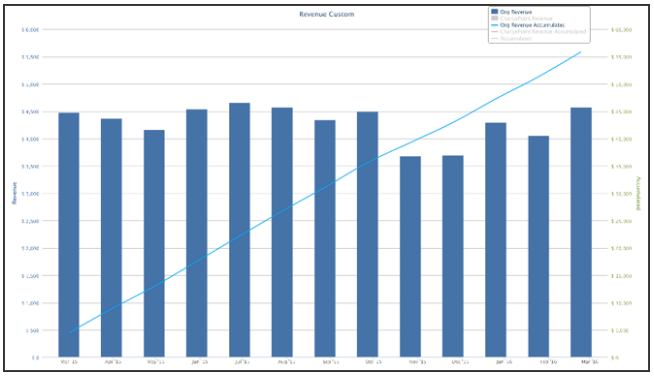


Revenue

This chart shows how much money was remitted to the station owner, either daily, weekly, monthly, or yearly.

This chart can be plotted by time (day, week, month, year) or by object (stations, groups).

Plotting by object shows which stations and groups are generating the most revenue.

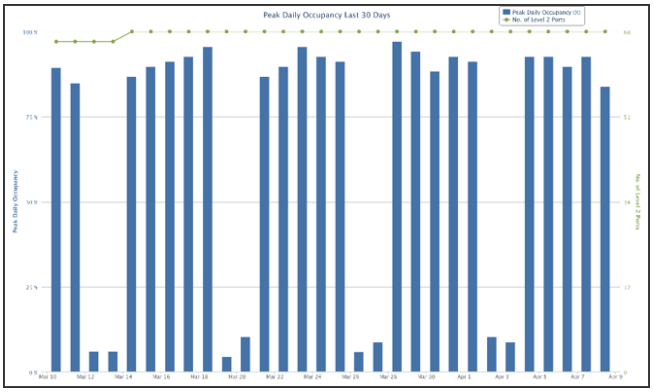


Peak Daily Occupancy

This chart shows the peak simultaneous use of the stations--that is, at their most utilized, the number of drivers that are using them.

- Green line is the number of Level 2 ports.
- Blue lines are % of ports in use at the peak over each 24-hour period.

For example, 20 ports with peak occupancy of 75% means at their most used, 15 drivers were plugged in at the same time (5 available).



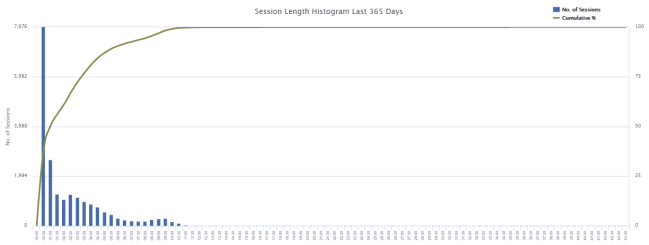
Session Length Histogram

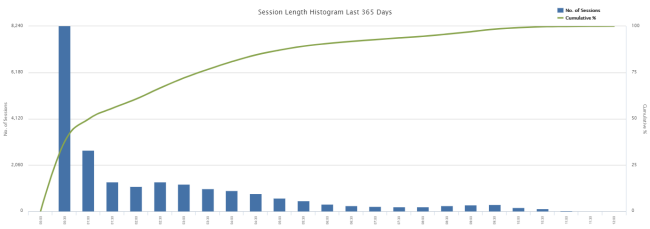
This page shows the number of charging sessions for every length of charging time, in increasing amounts of time, along with a cumulative % of sessions.

This is helpful to see a distribution of how long drivers remain plugged in.

In this example, 99.9% of the 15,000 sessions were charged between 30 minutes and 11 hours with only 1 or 2 sessions scattered at times between 12 and 43 hours. To focus your chart on the 99.9% (less than 12 hours), click **Filter** and enter:

- *Total Duration*
- *Less Than*
- *12:00:00*

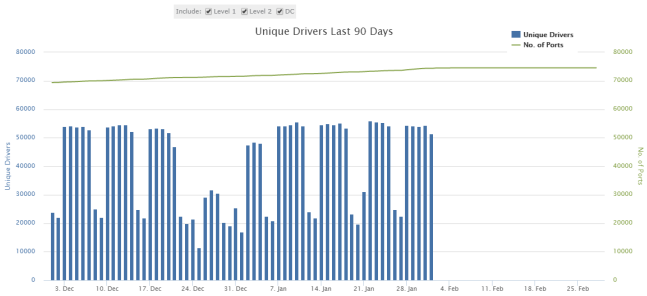




Unique Drivers

This page shows how many unique drivers plugged in during the indicated time period along with the number of ports.

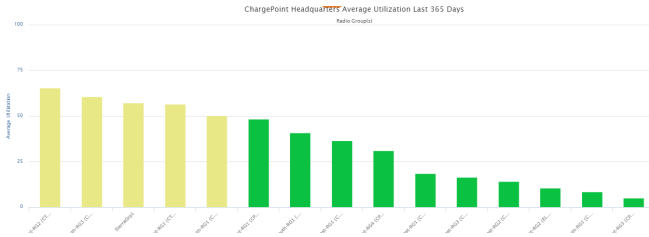
This is helpful to see how many unique employees, customers, residents, etc. are using your stations.



Average Utilization

This page shows the average percent of stations used in each group, listed in descending order.

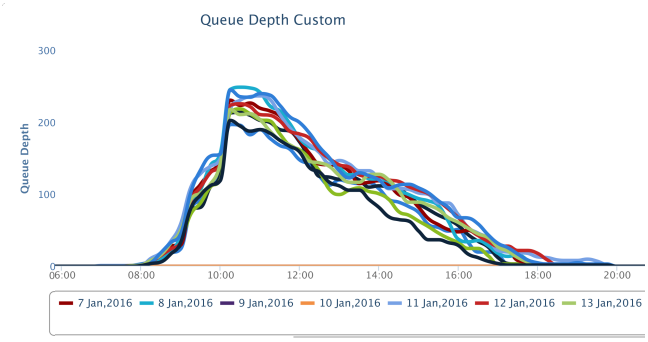
This is helpful to see where charging is more common and where to add more charging stations.



Queue Depth

This page shows the number of drivers waiting to use the Waitlist-enabled stations over the course of a day.

This is helpful to determine if drivers are able to get a charge each day or whether it is time to add more stations.

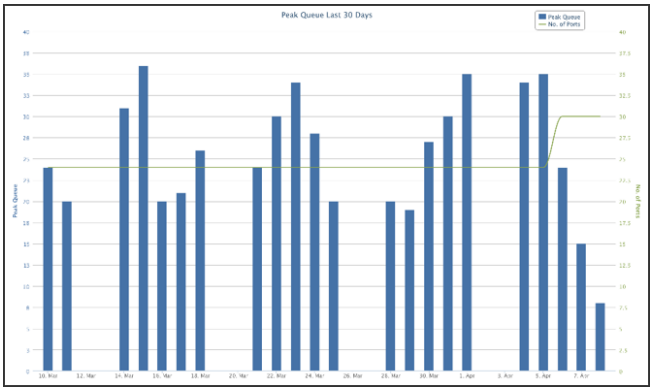


Peak Queue

For Waitlist-enabled stations, this graph shows the maximum number of drivers who were waiting each day.

This report may be normalized to the number of ports, which simply takes the queue depth and divides by the number of ports. This provides a convenient way to see how many drivers are waiting on a relative (per-port) basis.

If the queue depth regularly exceeds the number of ports by more than 2x, it is probably time to plan for more stations installed.

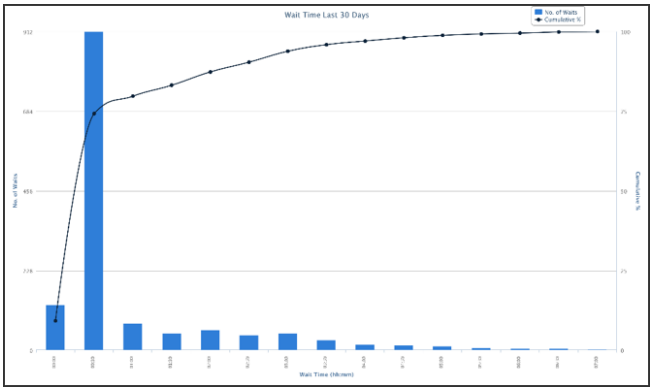


Wait Time

For Waitlist-enabled stations, this graph shows the distribution of how long drivers waited until being offered a charging spot.

In this example, the average wait time is 41 minutes, with most drivers getting a port in 30 minutes or less.

Long average wait times is an indicator that more stations may be needed or that a policy change may be required to reduce wait times.

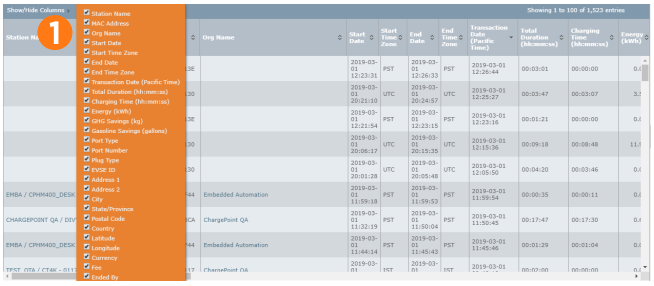


Session Details Table

This page shows a sortable overview of all details related to a charging session.

1. Click **Show/Hide Columns** for the list of columns to customize your report

To export to a file, see **--Export--** dropdown.

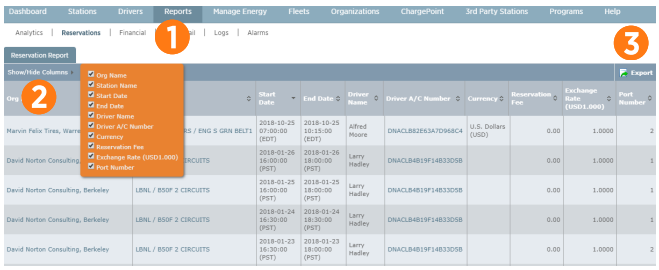


Reservation Reports

The reservation reports give you an overview of who is reserving which stations along with their fees.

We recommend customers to use the Waitlist feature rather than Reservations since Waitlist allows drivers to get in line if all the stations are currently occupied and because it provides a superior experience for drivers and station owners.

1. Log in to ChargePoint and click **Reports > Reservations**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Financial Reports

The financial reports provide information about how much revenue your charging stations are generating, if you have enabled pricing (Flex Billing) on your stations.

The reports will be empty if you have configured your stations to be free for everyone who can use them.

1. Log in to ChargePoint and click **Reports > Financial**.

2. The green menu bar lists the available types of financial reports:

Financial Report	Brief Description
Organization Statement	Summary and detailed reports of Orgs and their revenue.
Activation	All types of activations, with their Orgs, MAC address, etc.
Employee Benefit	Computes the “net financial benefit” to your Connected drivers.
Tax	Tax Summary; Tax Details; Usage and Fees.

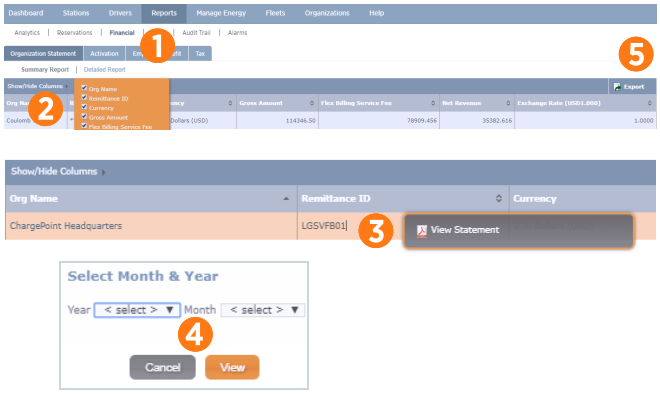
Organization Statement

Summary Report

This page lists a brief overview of organizations’ revenue and Flex Billing service fees.

Note: You will want to filter this report by Transaction Month to see the total for that month.

1. Log in to ChargePoint and click **Reports > Financial > Organization Statement**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. To get a PDF statement, click on the row you want and select **View Statement**
4. Select the **Year** and **Month** you want, then click **View** to see a PDF.
5. You can also click **Export** to immediately save a .CSV file of the visible columns in your *Downloads* directory.



Detailed Report

This page provides an itemization of every financial transaction on your stations, allowing customers to filter and export for further analysis.

1. Log in to ChargePoint and click **Reports > Financial > Activation**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to save a .CSV file of either the **visible columns** or **all columns**. Upon selecting one of these options, the .CSV file will immediately be sent to your *Downloads* directory.

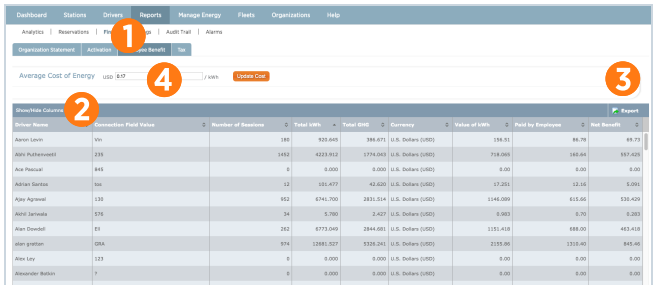
Activation

This page lists an overview of when stations were activated or when there was a hardware replacement along with their associated details.

1. Log in to ChargePoint and click **Reports > Financial > Activation**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns in your *Downloads* directory.

Employee Benefit

This report computes the "net financial benefit" to employees (your Connected drivers) for workplaces who provide free or subsidized charging to employees at workplace stations.



Note: This report may take some time to load.

1. Log in to ChargePoint and click **Reports > Financial > Employee Benefit**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns in your *Downloads* directory.
4. To adjust the **Average Cost of Energy** used to calculate in the table, enter a value and click **Update Cost**.

Tax

This page contains everything related to taxes and is divided into three sub-pages:

- Tax Summary
- Tax Detail
- Usage and Fees

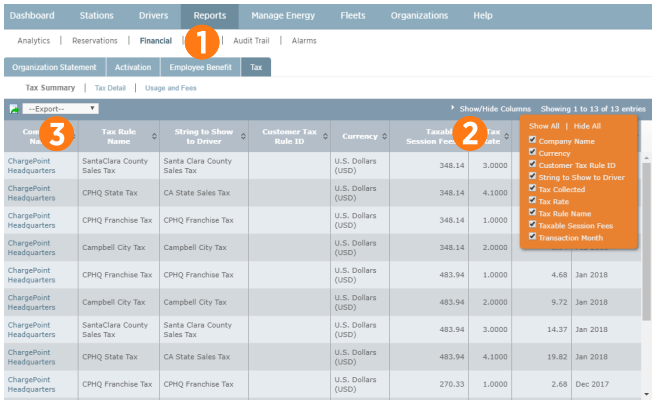
Note: The tax reports will appear to organizations in the USA who have requested the tax facility (part of the Flex Billing service) to be enabled for their organization. Contact support if you would like that facility enabled for your organization.

Tax Summary

This report shows the total amount of tax collected from driver and remitted by ChargePoint to you

for each tax rule you have defined, on a per-month basis.

1. Log in to ChargePoint and click **Reports > Financial > Tax > Tax Summary**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to save a .CSV file of either the **visible columns** or **all columns**. Upon selecting one of these options, the .CSV file will immediately be sent to your *Downloads* directory.



Tax Detail

This page provides the full itemization of every transaction (charging session) that had a tax impact per the tax rules you have defined and is the detail behind the Tax Summary report described above.

Each line is per session and per tax rule; so, for example, if there are two tax rules that affect a session (such as sales tax and franchise tax), that session will be listed twice, with one row per tax rule.

1. Log in to ChargePoint and click **Reports > Financial > Tax > Tax Detail**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to save a .CSV file of either the **visible columns** or **all columns**. Upon selecting one of these options, the .CSV file will immediately be sent to your *Downloads* directory.

Usage and Fees

This brings together data available in other reports into one convenient listing.

Note: This page takes a long time to load.

1. Log in to ChargePoint and click **Reports > Financial > Tax > Usage and Fees**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to save a .CSV file of either the **visible columns** or **all columns**. Upon selecting one of these options, the .CSV file will immediately be sent to your *Downloads* directory.

Log Reports

The log reports are primarily for troubleshooting purposes. They show a history of messages sent between the station and cloud, primarily related to changes you have made in how the stations are configured by price, access control, etc.

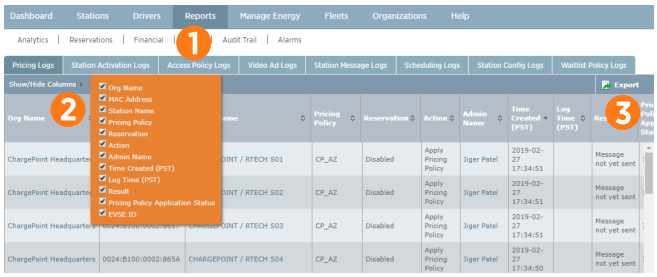
1. Log in to ChargePoint and click **Reports > Logs**.
2. The menu bar lists the available types of log reports:

Log Report	Brief Description
Pricing Logs	Pricing policy, organization, MAC address, and status.
Station Activation Logs	Organization, station, gateway MAC address, and status.
Access Policy Logs	Access policy and type for all stations and status.
Video Ad Logs	Video ads displayed on stations and status.
Station Message Logs	Messages displayed on stations and status.
Scheduling Logs	Station scheduling, their results, and status.
Station Config Logs	Station name, configuration type, action, and status.
Waitlist Policy Logs	Driver Waitlist, organization, station, action, and status.

Pricing Logs

This log lists items related to pricing configuration changes.

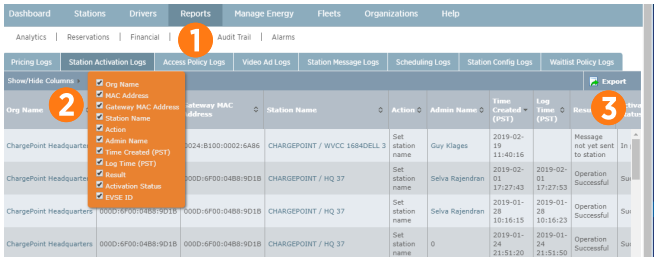
1. Log in to ChargePoint and click **Reports > Logs > Pricing Logs**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Station Activation Logs

This log lists items related to station activation.

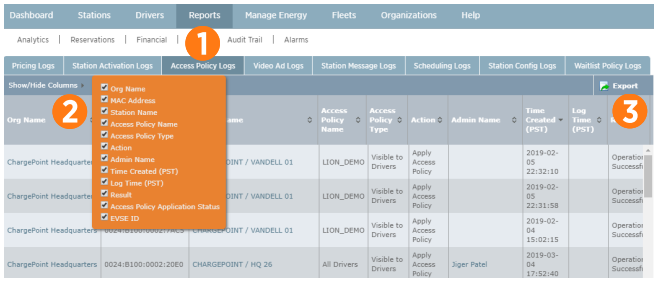
1. Log in to ChargePoint and click **Reports > Logs > Station Activation Logs**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Access Policy Logs

This log lists items related to access control configuration changes.

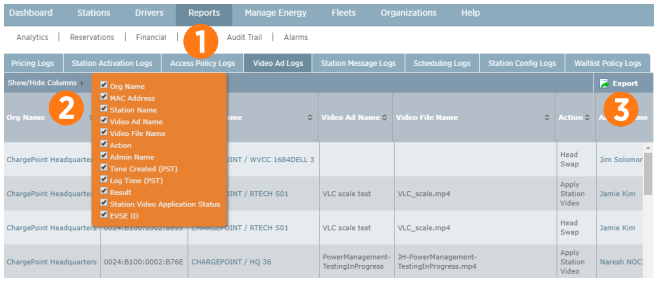
1. Log in to ChargePoint and click **Reports > Logs > Access Policy Logs**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Video Ad Logs

This log lists items related to video ad configuration changes.

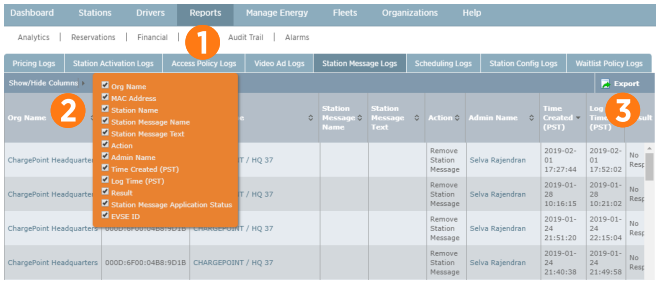
1. Log in to ChargePoint and click **Reports > Logs > Video Ad Logs**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Station Message Logs

This log lists items related to station message configuration changes.

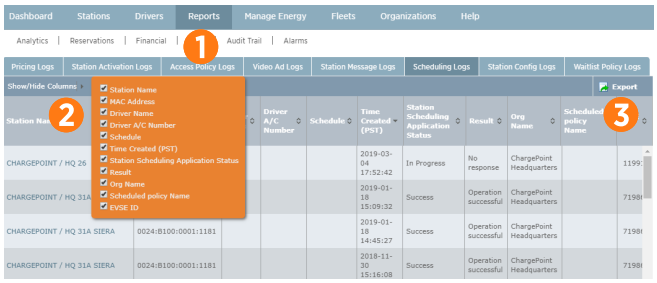
1. Log in to ChargePoint and click **Reports > Logs > Station Message Logs**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Scheduling Logs

This log lists items related to scheduled charging configuration changes.

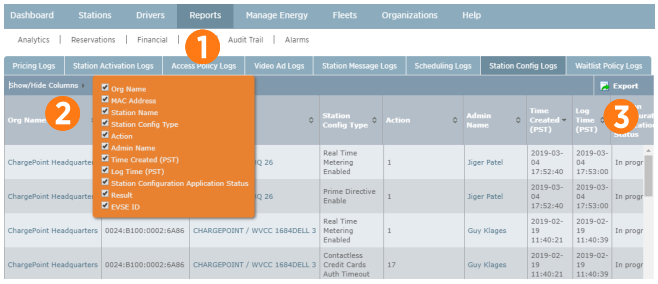
1. Log in to ChargePoint and click **Reports > Logs > Scheduling Logs**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Station Config Logs

This log lists miscellaneous items related to station configuration changes.

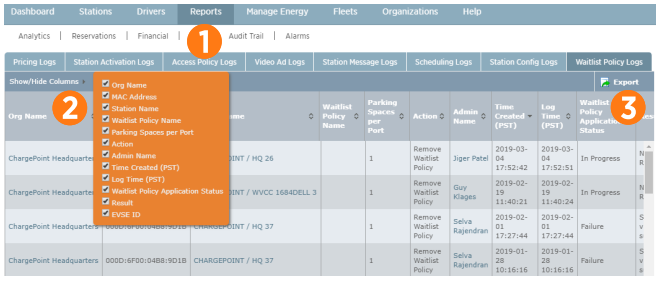
1. Log in to ChargePoint and click **Reports > Logs > Station Config Logs**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Waitlist Policy Logs

This log lists items related to Waitlist configuration changes.

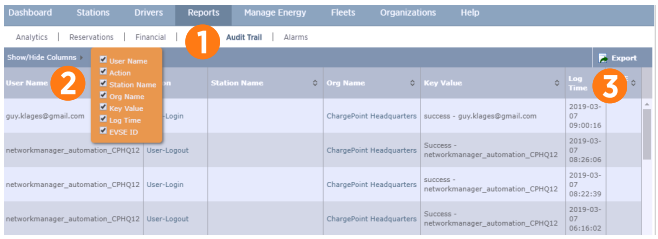
1. Log in to ChargePoint and click **Reports > Logs > Waitlist Policy Logs**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Audit Trail Reports

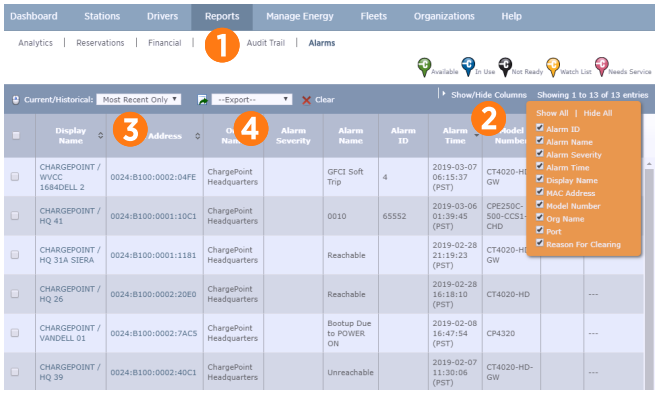
This log lists items related to audit trails, such as the user name, action, station name, organization name, key value description, and log time.

1. Log in to ChargePoint and click **Reports > Audit Trail**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click **Export** to immediately save a .CSV file of the visible columns to your *Downloads* directory.



Alarm Reports

This report shows a list of all current or historical alarms generated by the stations (or in some cases, by the cloud, such as for loss of network connection to the station).



1. Log in to ChargePoint and click **Reports > Alarms**.
2. Click **Show/Hide Columns** for the list of columns to customize your report.
3. Click the **Current/Historical** dropdown to limit the alarms:
   - Most Recent Only
   - Current Alarms
   - Historical Alarms
   - All Alarms
4. Click **Export** to save a .CSV file of either the **visible columns** or **all columns**. Upon selecting one of these options, the .CSV file will immediately be sent to your *Downloads* directory.