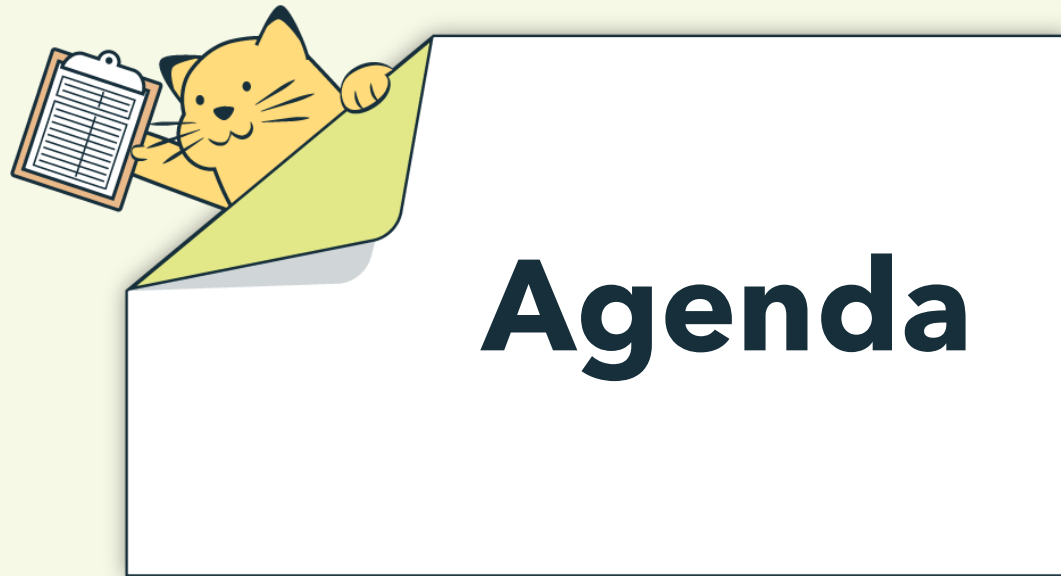




EnergyCAP 101: The Basics



Beth Calehuff // Customer Success
Manager



- ✓ What is EnergyCAP
UtilityManagement ("EUM")?
- ✓ What type of information is in EUM?
- ✓ Overview & Navigation
- ✓ Objects Required for Data
- ✓ Hands on practice creating
EnergyCAP objects
- ✓ Q&A

Access to Training Instance

- Check your email for an Invite to Join EnergyCAP
- Subject will read "You've Been Invited to EnergyCAP"
- Click Activate My Account
- Select password options, then reset password



You've been invited!
Activate your account by creating your password

After you create your password you'll join **2024 Toronto Catalyst: Read-Write**

Click the button below to confirm bcalehuff84@gmail.com is your email address and to set your password.

If you think you received this email in error, you don't have to do anything.

[Activate My Account](#)

If you are having issues using the "Activate My Account" button, please copy the following link and paste it in your browser:

<https://login.energycap.com/invite?email=bcalehuff84%40gmail.com&code=be0ea77d1ce846798ae12295fd70b040>

This e-mail message (and any attachment) is intended for the use of the individual or entity to which it is addressed. This message contains information that may be privileged, confidential, or exempt from disclosure under applicable law. If you are not the intended recipient or authorized to receive this for the intended recipient, any use, dissemination, distribution, retention, archiving, or copying of this communication is strictly prohibited.

Access to Training Instance

URL: <http://login.energycap.com>

Username: Your email address

Password: set or enter your password

Organizations:

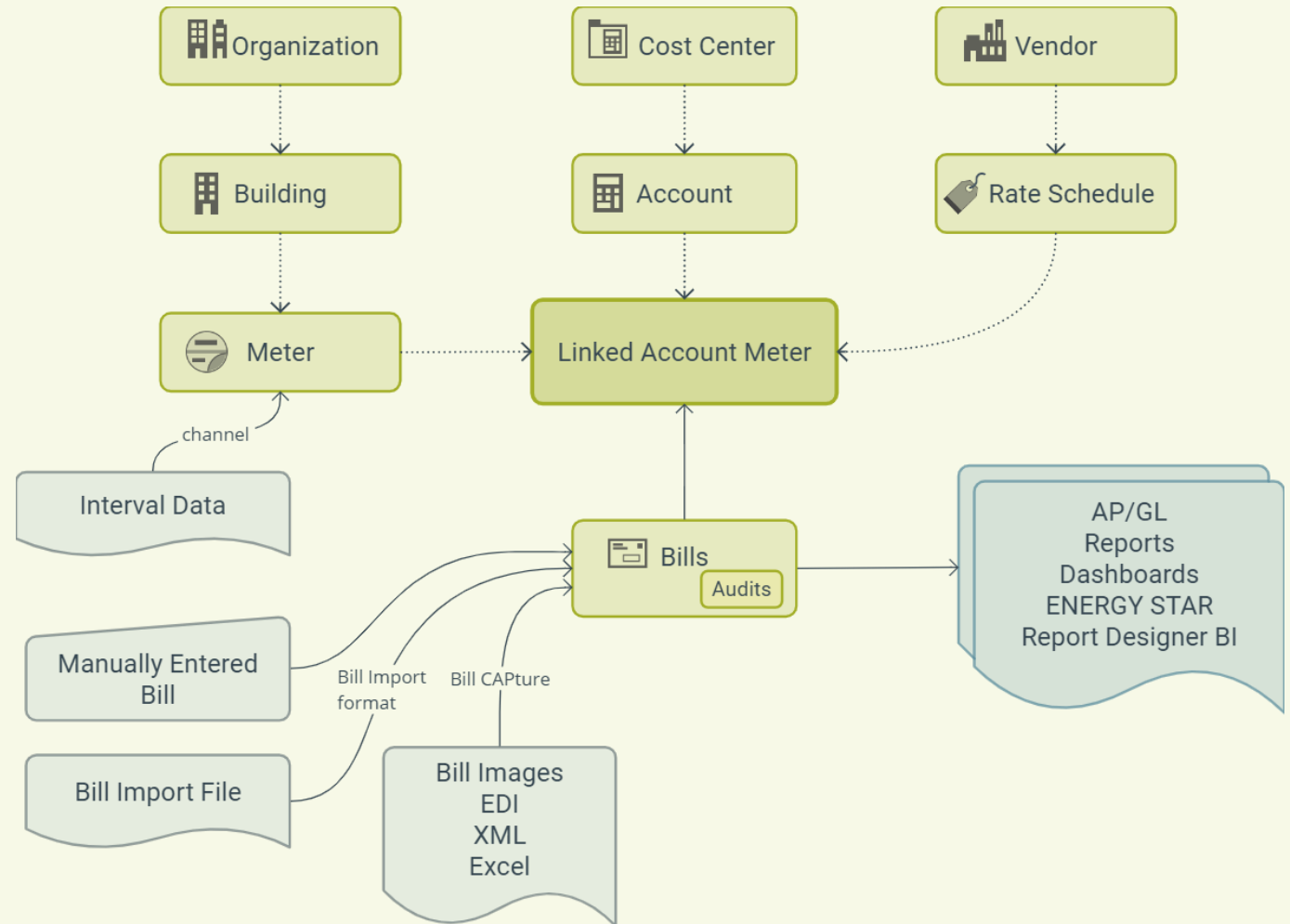
- 2024 Toronto Catalyst: Read-Write
- 2024 Toronto Catalyst: Read-Only

The image shows a login interface for ENERGYCAP. At the top, the logo "ENERGYCAP" is displayed in a bold, black, sans-serif font. Below the logo, the word "Email" is positioned to the left of a rectangular input field. To the right of the input field is a dark blue button with the word "Continue" in yellow text. At the bottom of the interface, there are two links: "Contact Support" and "Privacy Policy", both in a smaller, grey font.

What is EnergyCAP UtilityManagement ("EUM")?

What information is in EUM?

- Buildings
- Meters
- Accounts
- Utility bills
- Vendors and rate schedules
- Users
- Interval data



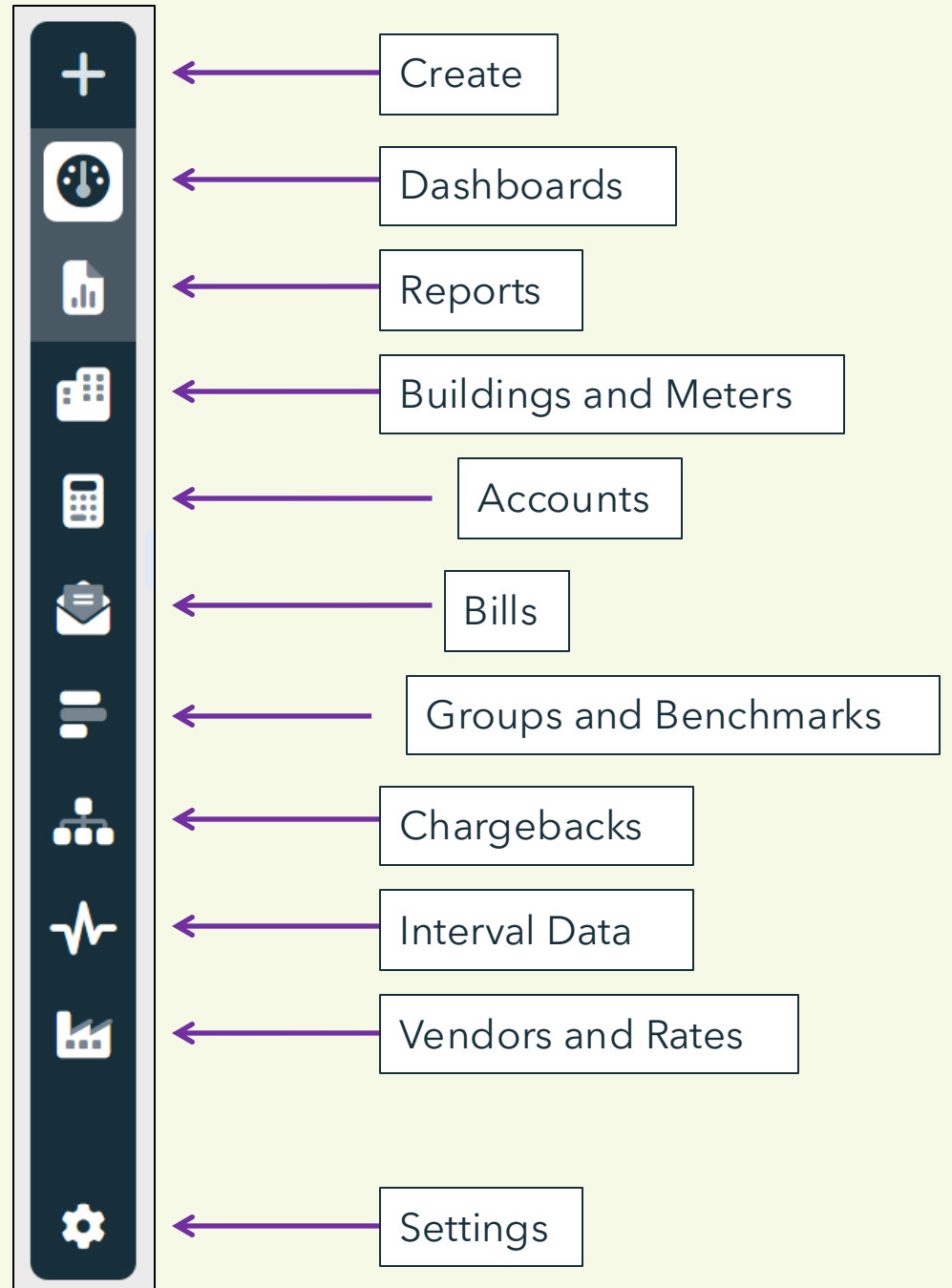
Utility Bill Data

Utility bill data can be entered into EnergyCAP in a variety of ways. The data can then be validated and analyzed. We'll cover these in more details over the next few sessions.

- Manual Entry
- Bill Import
- Bill CAPture (Advanced Session)
- Chargebacks (Advanced Session)



EnergyCAP Modules



Let's go to the app....



1. Use the search box to find Happy Valley Center building.
2. What was the total billing period water usage in 2022?



1. Go to the Accounts module.
2. Find "1st & Main Parking Garage" Cost Center and select Account "220 1st Ave - ELE".
3. What is the total electric cost for the year 2023?



1. In the Bills module, click on a bill list.
2. Open the PDF bill image.
3. Click on the bill record and view it.



1. Click on the Gear icon (lower left) and select Users and Roles.
2. Click the User Groups tab.
3. Create a User Group. Add a name and description for your group, add your initials to help you find it later.
4. Add people to your group.

What is needed to enter a bill?

We need a lot to be in place before you can enter your utility bill data into EnergyCAP.

You can think of these items in three different areas.

- Vendor
- Rate schedule
- Cost center
- Account
- Organization
- Building
- Meter

Vendor & Rate Schedule



For services, call 1-800-234-2832
M-F: 8am to 5pm
Visit www.yourutilitycompany.com

Service for:
John Customer
123 Main St.
Anytown, PA 12345
555-555-5555

Account Number	1234-56789
Bill Date	01/15/2017
Due Date	02/15/2017
Amount Due	\$49.60

Meter Information

Read Date	Meter Number	Rate	Reading Type	Meter Reading		Difference	Multiplier X	Usage
				Previous	Present			
01/15	22335566778	GS-1	Tot units	4082 Actual	4578 Actual	496	1	496

Service 12/15/2016 to 01/15/2017 - 31 days



Hands-on exercise: Create the Vendor

1. Use the Create button and click **Add Vendor**.
2. Review the bill and add the vendor's name as it appears on the bill.
 - "<Your Name> Utility Company"
 - *Example: Beth Calehuff Utility Company*
3. Each vendor is represented with a unique code, your organization may be using a specific code for each vendor in your accounting system.
4. The rest of the form is optional.

Add New Vendor

Name	REMIT ADDRESS		
<input type="text" value="*"/>	Country	<input type="text" value="United States"/>	
Code	Postal code		
<input type="text" value="*"/>	<input type="text"/>		
Website	Street address		
<input type="text" value="https://"/>	<input type="text"/>		
	<input type="text"/>		
	<input type="text"/>		
	City	State	
	<input type="text"/>	<input type="text"/>	



Hands-on exercise: Create the Rate Schedule

1. Use the Create button and click **Add Rate Schedule**.
2. Use the menu to select the **Vendor**.
3. Select the **Commodity**.
4. Enter the name of the rate schedule.

Example: GS-1

5. Save.

Add New Rate Schedule

Vendor

City of Green Shamrock

Commodity

* Choose

Rate Schedule

*

Meter Information

Read Date	Meter Number	Rate	Reading Type	Meter Reading		Difference	Multiplier X	Usage
				Previous	Present			
01/15	22335566778	GS-1	Tot units	4082 Actual	4578 Actual	496	1	496

Service 12/15/2016 to 01/15/2017 - 31 days

What is needed to enter a bill?

- Vendor ✓
- Rate schedule ✓
- **Cost center** (helps organize your accounts in "folders")
 - Your accounting tree may mirror your buildings and meters tree OR it can represent your organization's financial structure.
 - You can create multiple levels by adding cost centers under cost centers. This helps you view subtotaled use, cost, and trends at different levels.
- Account



Hands-on exercise: Create the Cost Center

1. Use the Create button and click **Add Cost Center** under the New Cost Center folder.
2. Cost centers can be nested, just like folders on your computer.
3. Select where you want to create this cost center (select the cost center New Cost Center).
4. Enter the name of the cost center.
5. Add a unique code. It is created for you, but you can change it. Your accounting department may already have cost centers and codes that it uses.

Create the Account

- Vendor ✓
- Rate schedule ✓
- Cost center ✓
- **Accounts** can be vendor accounts or internal chargeback accounts.
 - An account receives bills for one or more meters.
 - Associated with a single vendor.
 - Most often, one physical bill is associated with a single account.
 - Use your utility bill when creating the new account.

Create the Account



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Anytown, PA 12345
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Service 12/15/2016 to 01/15/2017 - 31 days

Create the Account

Use the Create button and click **Add Account**. Select the cost center you just created as the parent.

Add New Account

CancelSave

Parent cost center

Beth Calehuff's Cost Center

Service effective

01/01/2010

MM/DD/YYYY

Country

United States

Vendor

Beth C's Utility Company

Description

Postal code

16803

Account number

1234-56789-BAC

Account name

☒ Use account number

☐

Street address

City

State College

State

PA

Create the Organization

- Vendor ✓
- Rate schedule ✓
- Cost center ✓
- Accounts ✓
- **Organization**
 - Group buildings together.
 - Can represent departments, campuses, or other business units.
 - View subtotaled use, cost, and trends.
 - Used as filters (topmost place).
 - Can restrict user access by assigning a topmost place.



Hands-on exercise: Create the Organization

1. Use the Create button and click **Add Organization**.
2. Organizations can be nested, just like folders on your computer.
3. Select where you want to create this organization (New Buildings).
4. Enter the name of the organization.
5. Add a unique code. It is created for you, but you can change it. Your organization may already have organizations and codes it uses in your facilities management department.

Create the Building

- Vendor ✓
- Rate schedule ✓
- Cost center ✓
- Accounts ✓
- Organization ✓
- **Building** can represent a physical structure or logical place and is the parent of one or more meters.
 - Primary use is used for automatic groups.
 - Latitude and longitude help place the building accurately on the map.



Hands-on exercise: Create the Building

1. Use the Create button and click **Add Building**. You cannot create a building under a building.
2. Select where you want to create this building or place (Select the org you just created). Let's create (YOUR BUILDING)
3. Enter the name of the building (**Beth Calehuff Place**).
4. Add a unique code. It is created for you, but you can change it. Your organization may already have building codes that it uses.
5. Enter the Postal code.
6. Select the primary use. (optional)

Example: Other-Restaurant/Bar

Create the Meter

- Vendor ✓
- Rate schedule ✓
- Cost center ✓
- Accounts ✓
- Organization ✓
- Building ✓
- **Meter**
 - Tracks the use and cost of a resource.
 - Best practice is to attach it to a building



Hands-on exercise: Create the Meter

1. Use the Create button and click **Add Meter**.
2. Select where you want to attach this meter (the parent).
Let's create it (**ELECTRIC**).
3. Select the commodity and use unit.
4. Enter the name of the meter and code.
5. Enter the Postal code.

Link the Account and Meter

- Vendor ✓
- Rate schedule ✓
- Cost center ✓
- Accounts ✓
- Organization ✓
- Building ✓
- Meter ✓

Link the Account and Meter

A meter must be **linked** to an active account before you can record billing data.

Bills

Actual Data

Calendarized Data

Normalized Data

Interval Data

Savings

Sustainability ✦

Properties

Flags

Meter

Chargebacks

▼ Linked Accounts - 0

Link at least one account to this meter to enter bill data. Only active meters can receive new bills. Inactive meters may not be displayed depending on your settings.

+ Add Linked Account

Ready to enter utility bill data!



Setup Spreadsheets

Setup spreadsheets save time and let you create multiple items at one time.

- Always **download** a new spreadsheet before you begin adding data because the spreadsheet is populated with information from your database.
- To save time when creating many objects, you can select from the drop-down menu and then copy and paste the value into the other rows.
- Do not rename, remove, or rearrange columns.
- You can add sheets, only the sheet named DataEntry is processed.

Setup Spreadsheets

B4									
	B	C	D	E	F	G	H	I	J
1	New Account Information		Account's Address						
2	Account Number	Account Name	Service Address: Street 1	Service Address: Street 2	Service Address: Street 3	Service Address: City	Service Address: State / Province / Region	Service Address: Postal Code	Service Address: Country
3	Unique per vendor - max 50 characters (required for new accounts)	Max 50 characters (required for new accounts)	Max 100 characters (optional)	Max 100 characters (optional)	Max 100 characters (optional)	For US and Canada, automatically set based on Postal Code lookup - max 100 characters (optional)	For US and Canada, automatically set based on Postal Code lookup - max 100 characters (optional)	Enter as text - required if Country is "United States" or "Canada"	Select from list (default is "United States")
4									
5									
6									
7									
8									
9									

	B	C	D	E	F	G	H
1	New Organization Information			Organization's Description	Parent Information	New Building Information	
2	Organization [code]	Organization Name	Organization Type	Organization Description	Parent Organization [code]	Building [code]	Building Name
3	Must be unique - max 32 characters (required for new organizations)	Max 50 characters (required for new organizations)	Select from list (default is Organization)	Max 4000 characters (optional)	Max 32 characters (required for both new organizations and buildings) (Defaults to User's Topmost)	Max 32 characters (required for new buildings)	Max 50 characters (required for new buildings)
4							
5							
6							
7							
8							
9							
10							

Wrap up



Questions?

Take the session survey:
EnergyCAP 101: The Basics

