EnergyCAP 101 Basics and Objects

CATALYST△

Session Agenda

This session contains hands on exercises.

- What is EnergyCAP?

- What type of information is in EnergyCAP?

- General EnergyCAP navigation

- Overview of EnergyCAP modules

- Overview the required EnergyCAP objects for bill data
  - Some objects need to be created before others.

- Hands on practice creating EnergyCAP objects
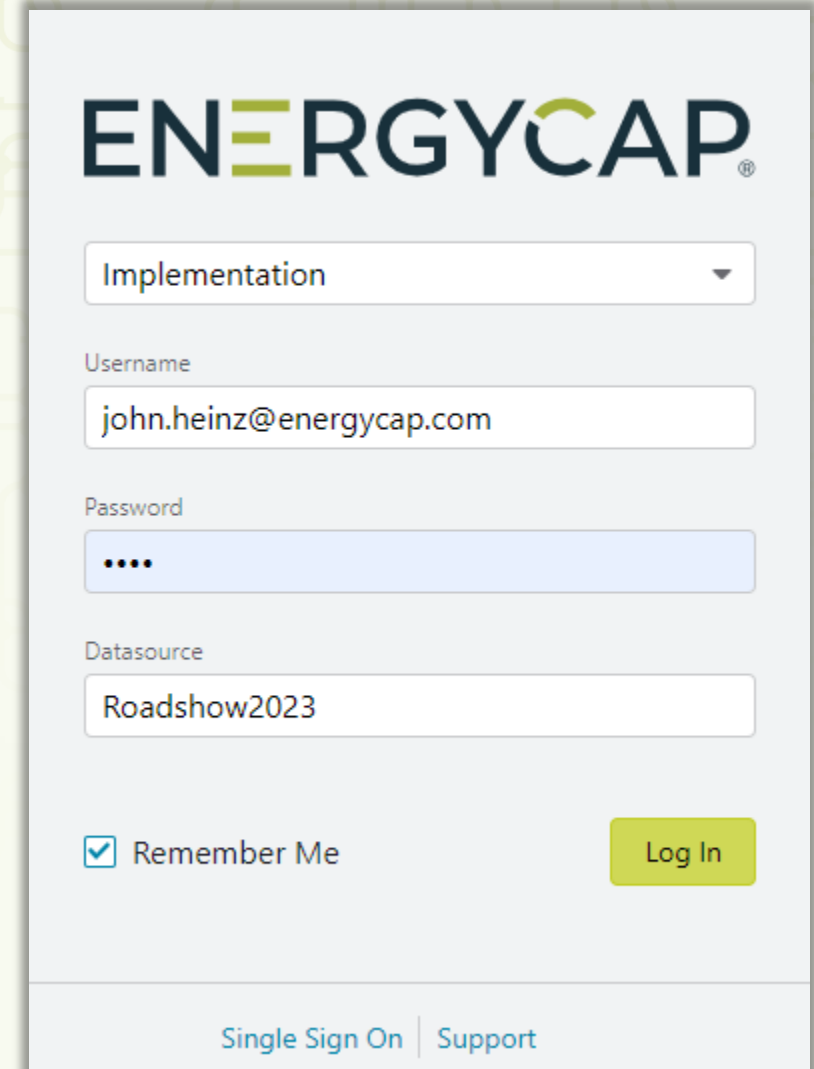
- Q&A

Access to Training Instance

http://My.EnergyCAP.com

"Implementation" in the dropdown

Username: Your email address

Password: 1234

Datasource: Roadshow2023
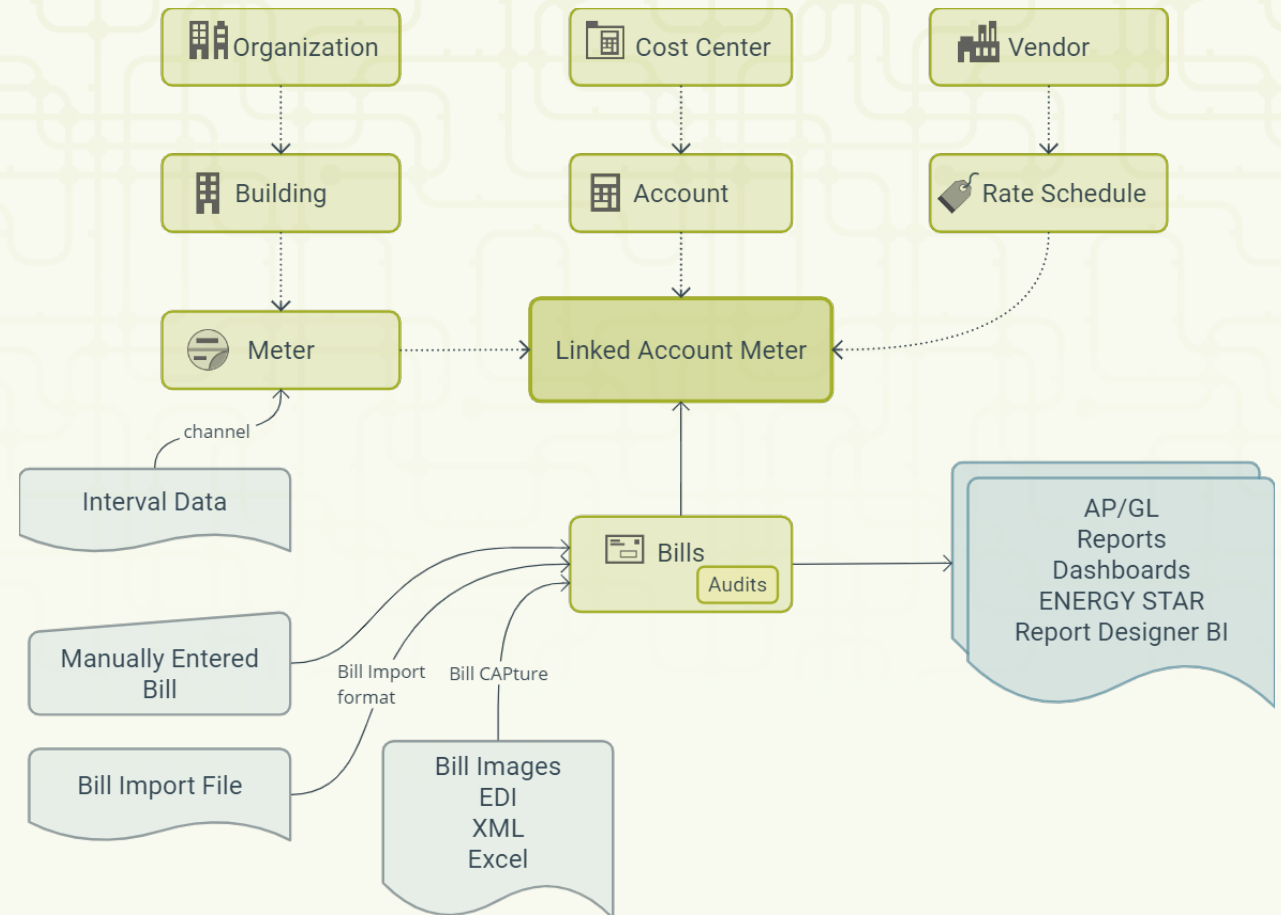
What is EnergyCAP UtilityManagement?

What information is in EnergyCAP?

- 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. 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

- Dashboards
- Buildings and Meters
- Accounts
- Bills
- Groups and Benchmarks
- Chargebacks
- Interval Data
- Vendors and Rates
- Reports

Personal Settings

Preferences and Settings

Select personalized view settings

Alerts and notifications

? - Access to Help

Updated based on where you are in the app

Access to resources

Global Settings

System Settings
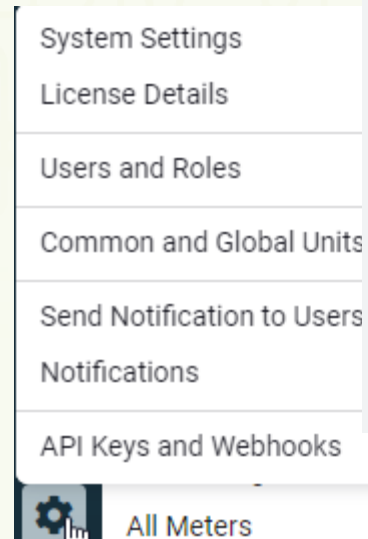
Used for global and system controls

Users settings

Commodities and units of measure

Notification settings

API keys and webhooks

Users and Roles

Active Users

- You can easily change roles.

Inactive Users

- When made inactive the user is immediately logged out.

User Groups

- You can sometimes make these on the fly.

- Can add non-EnergyCAP users, they get the Basic Contact role.

Roles and Permissions

- System roles can't be modified.

- Make a copy and then change permissions as needed.

Search

Search

Quick and easy way to find an object.

When you search for an object, EnergyCAP returns the first 50 of each object type.

Create

Three Types of Data

Billing Period data

- Uses the raw billing data as it is received from the utility vendor. This type of data is better when working with accounting functions.

Calendarized

- Allocates use and cost to the month it occurred rather than the month it was billed. For year-over-year COST comparisons use calendarized data. *ENERGY STAR uses calendarized data.

Normalized

- Is best when comparing USE year-over-year because it removes weather as a variable.

Hands-on Exercise

1. Use the search box to find Happy Valley Center building.

2. What was the total billing period water usage in 2021?

Hands-on Exercise

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 2021?

Hands-on Exercise

1. In the Bills module, click on a bill list.

2. Click on a bill and view it.

Hands-on Exercise

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Hands-on Exercise

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
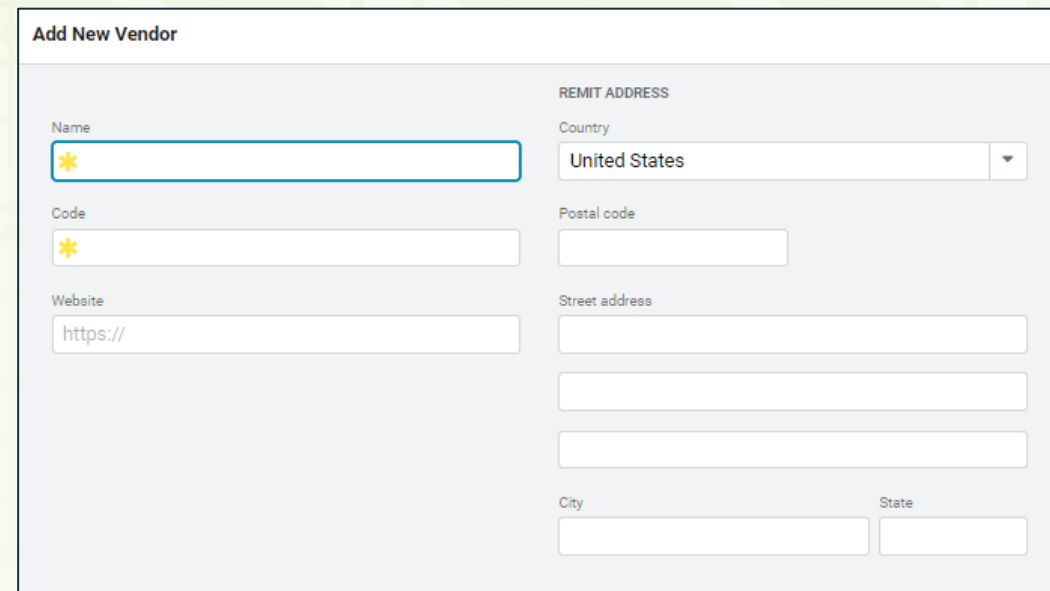
Create the Vendor

Hands-on exercise

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.

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.

Create the Rate Schedule

Hands-on exercise

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.

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

Create the Cost Center

Hands-on exercise

1. Use the Create button and click **Add Cost Center** under the New 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).

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

Create the Account

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

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.

Create the Organization

Hands-on exercise

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.

Create the Building

Hands-on exercise

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 (**John Heinz 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

Create the Meter

Hands-on exercise

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.

Ready to enter utility bill data!

Setup Spreadsheets

Setup spreadsheets save time and let you create multiple items at one time.
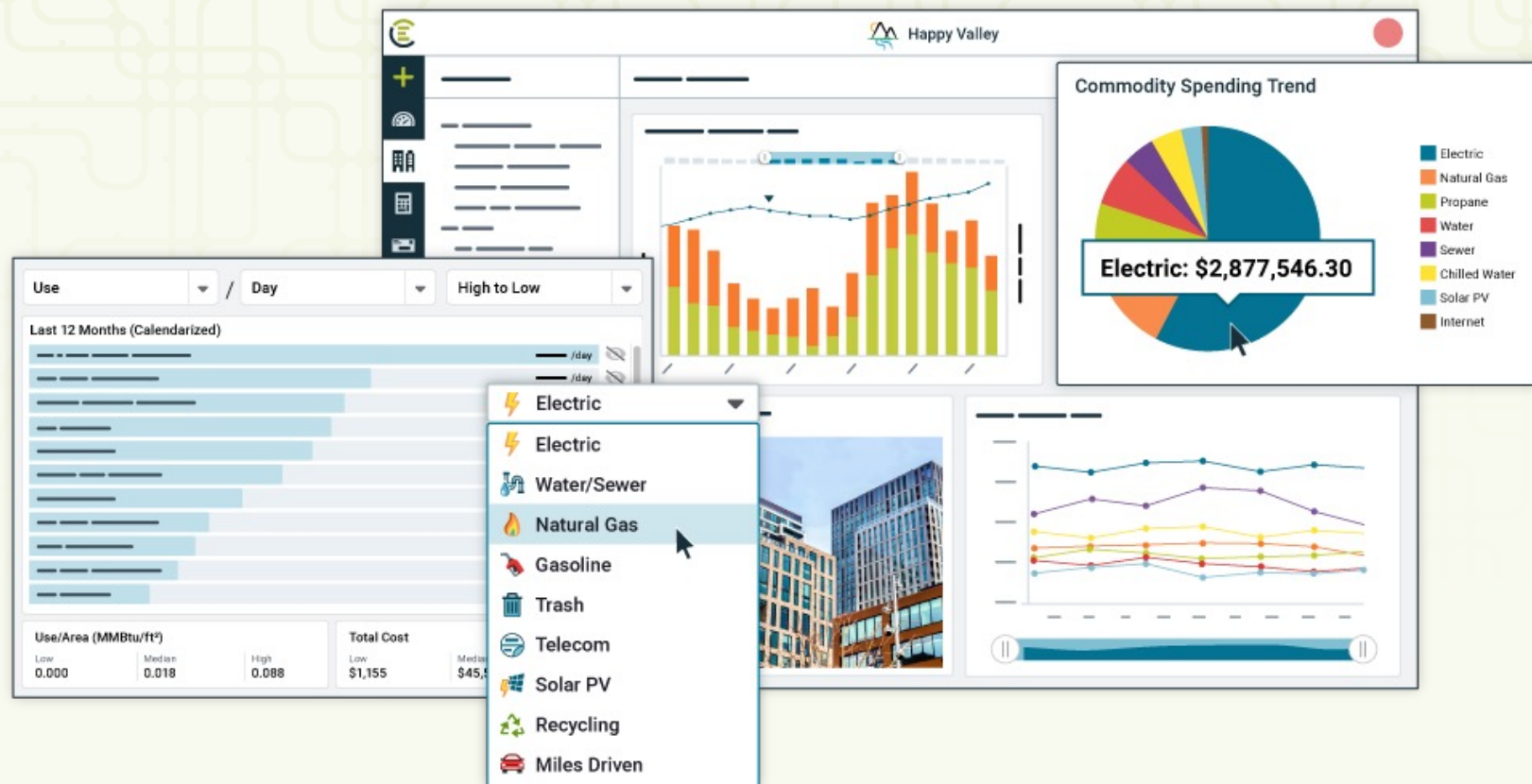
- Always **download** a new spreadsheet before you begin adding data because the spreadsheet is populated with information from your database.

- 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

New Account Information | **Account's Address**

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
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")*

New Organization Information | **Organization's Description** | **Parent Information** | **New Building Information**

Organization [code]	Organization Name	Organization Type	Organization Description	Parent Organization [code]	Building [code]	Building Name
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)*

Wrap up

Questions?

Session Survey

conferences.energycap.com/surveys

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