

What is EnergyCAP?

CATALYST 





Session Agenda

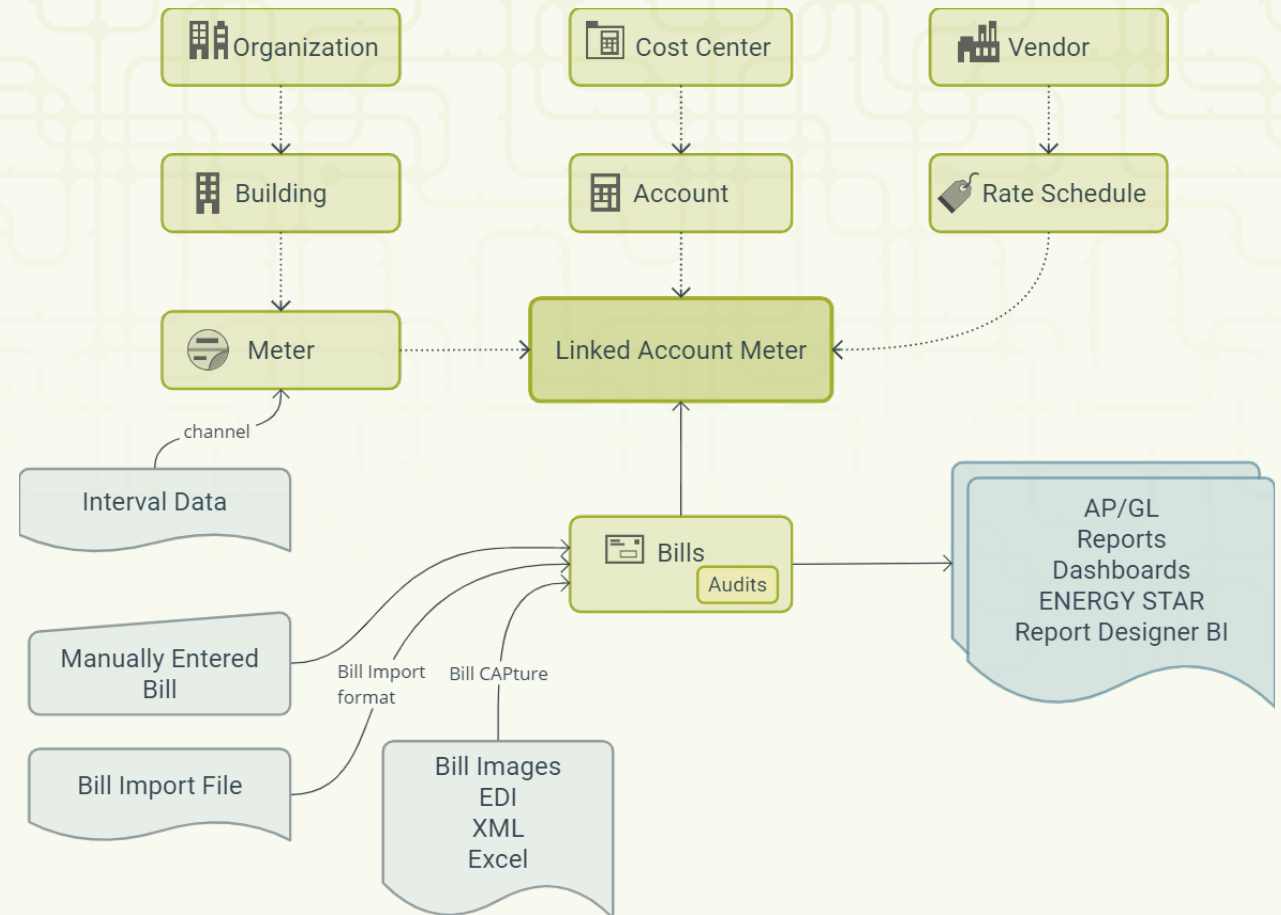
This session contains hands on exercises. Please open your laptops.

- What is EnergyCAP?
- What type of information is in EnergyCAP?
- General EnergyCAP navigation
- Overview of EnergyCAP modules
- Q&A
- Session Survey

What is EnergyCAP?

What information is in EnergyCAP?

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



What is EnergyCAP?

Hands-on exercise

1. Log into EnergyCAP
 - <https://login.energycap.com>
 - Enter your email address
2. Go to the Accounts module.
3. Find "1st & Main Parking Garage" Cost Center and select Account "220 1st Ave - ELE".
4. What is the total electric cost for the year 2021?

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.


Close


☐ 30 meters ☐ 15 accounts ☒ 7 facilities ☐ 1 cost centers

 **City Hall**
2131
1400 N Lincoln Ave, Happy Valley, PA 12345, United States

 **David Brant Hall**
DBH-070
200 Valley View Road, Happy Valley, PA 12345, United States

 **Lindon Hall**
LH-071
450 Valley View Road, Happy Valley, PA 12345, United States

 **McKenna Hall**
MH-072
500 Valley View Road, Happy Valley, PA 12345, United States

 **Rec Hall**
123
University Park, PA 16802, United States

Search

Hands-on exercise

1. Use the search box to find **Happy Valley Center** building
2. What was the total water usage in **2021**?

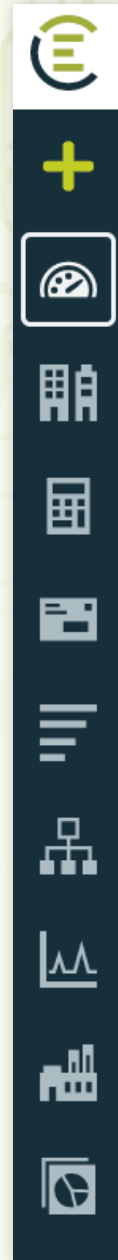
Enter utility bill data

Utility bill data can be entered into EnergyCAP in a variety of ways. We'll cover these in more details over the next few days.

- Manual Entry
- Bill Import
- Bill CAPture
- Chargebacks



EnergyCAP modules



← Dashboards

← Buildings and Meters

← Accounts

← Bills

← Groups and Benchmarks

← Chargebacks

← Interval Data

← Vendors and Rates

← Reports

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

Hands-on exercise

1. In the Bills module, click on a bill list.
2. Click on a bill and view it.
3. Click on the Reports module, select **Report-01-EXEC**.
4. Download the report as a PDF.

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.

User Groups

Hands-on exercise

1. Click on the **Gear** icon (lower left) and select **Users and Roles**.
2. Click the **User Groups** tab.
3. Add a name and description for your group, add your initials to help you find it later.
4. Add people to your group. You can select users from the list and add an email for a non-EnergyCAP user.

User Roles

Hands-on exercise

1. Click on the **Gear** icon (lower left) and select **Users and Roles**.
2. Click the **Roles and Permissions** tab.
3. Select a role to copy.
4. Update the role name (add your initials) and update the description.
5. View the different permissions and use the question mark to get more information.
6. Add/Remove the checkmarks to add or remove access to those options.
7. After you save, you would be able to assign this role to a user. (don't assign this role today)
- 8. Delete** the role you just created. (if users are assigned you can't delete a role)

Wrap up



Questions?

Session Survey

conferences.energycap.com/surveys

