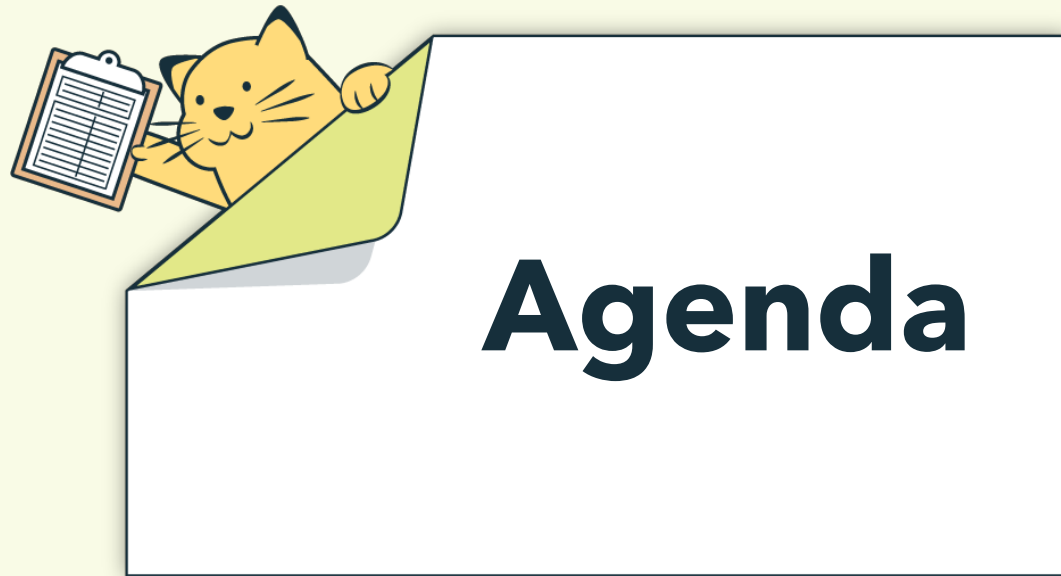


How do I set up objects and hierarchies?



Ellen Peck
Senior Project Manager
EnergyCAP





- ✓ Overview of the required objects for bill data
- ✓ Hands on practice creating objects
- ✓ Discussion on how you can create items in bulk
- ✓ Wrap-up: raffle, Q&A, survey

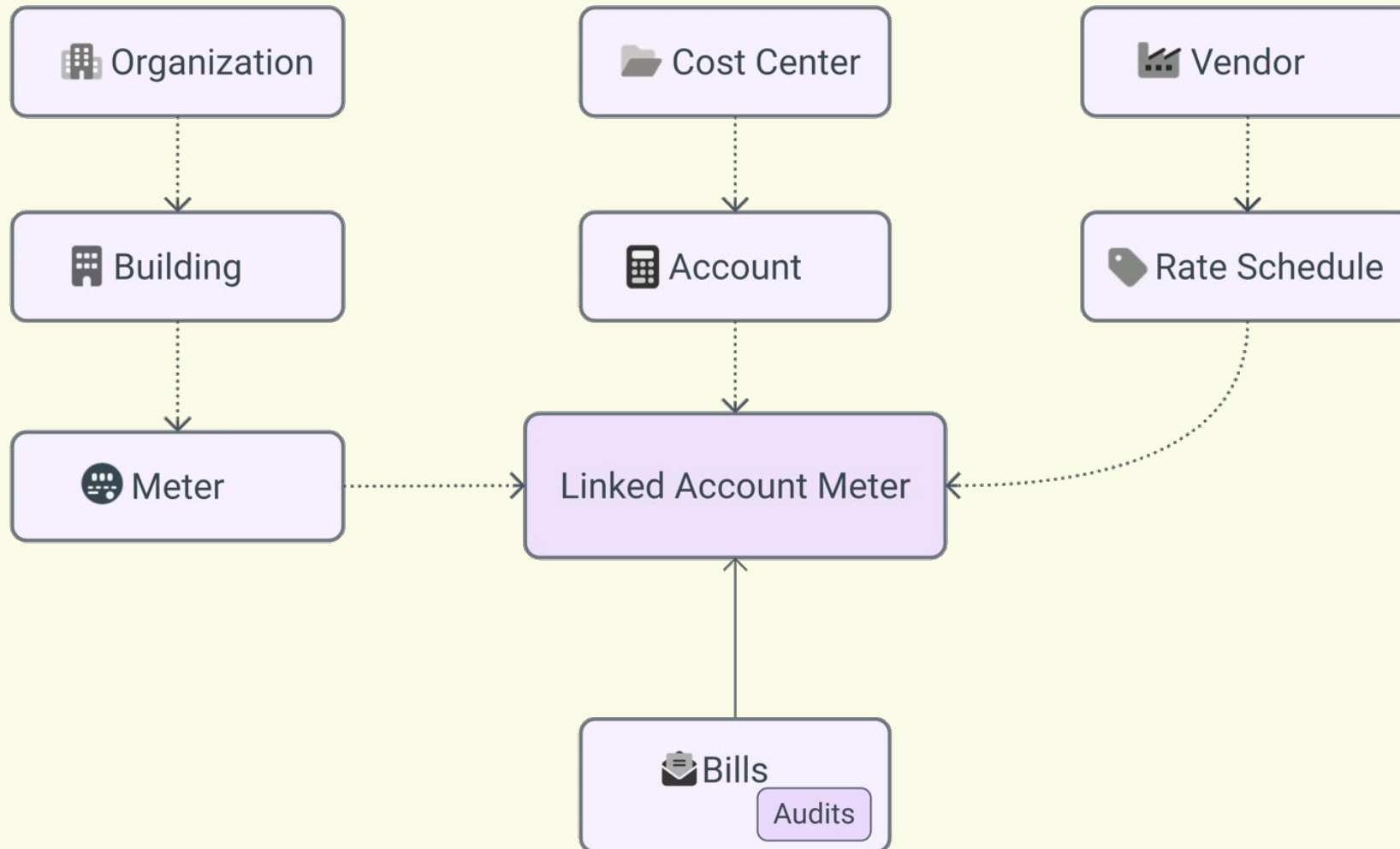
What is needed to enter a bill?

A lot of objects to be in place before you can enter your utility bill data into EnergyCAP UtilityManagement (EUM).

You can think of these items in three different categories:

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

System overview diagram



Vendor and 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

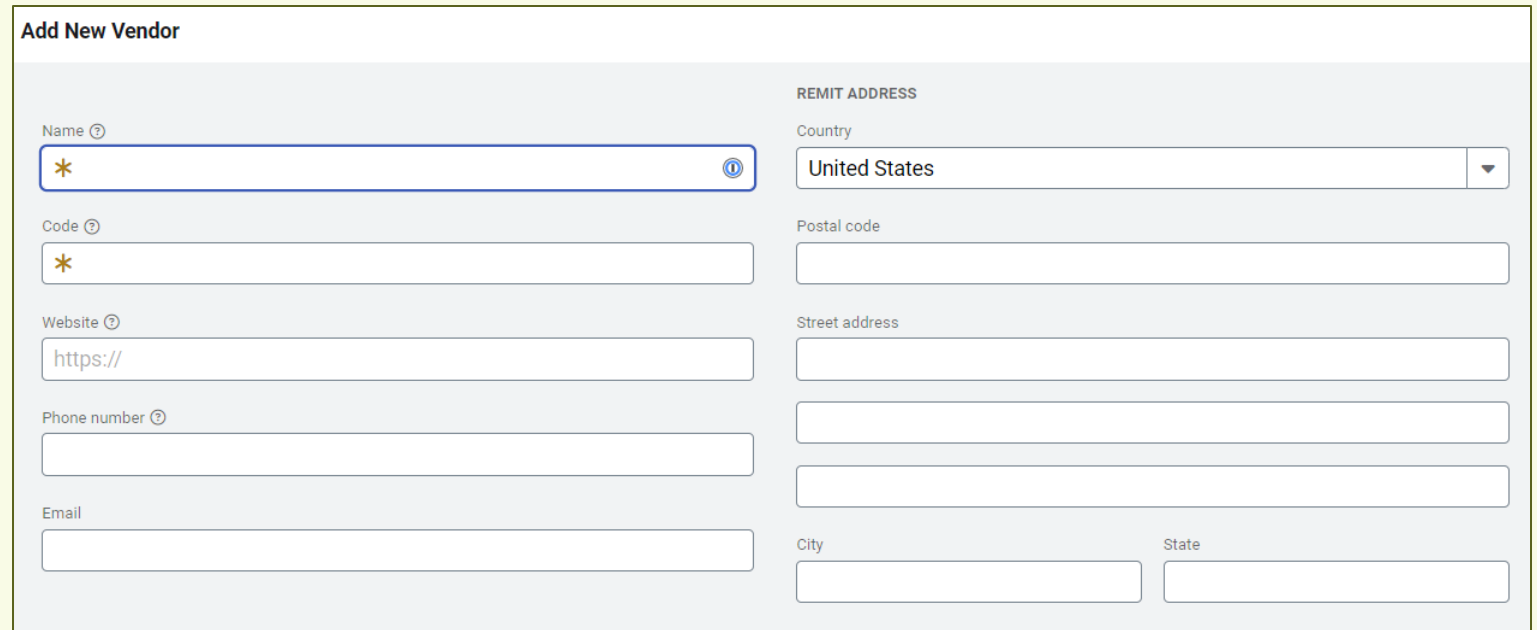
Read Date	Meter Number	Rate	Reading Type	Meter Reading		Difference	Multiplier X	Usage
				Previous	Present			
01/15	22335566778	GS-1	Tot units	4082 Actual	4578 Actual	496	1	496

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

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
 - *Example: EDP's Utility Co*
3. Each vendor gets 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



The screenshot shows the 'Add New Vendor' form in the EnergyCAP system. The form is divided into two main sections: a left column for general vendor information and a right column for the 'REMIT ADDRESS'. The left column contains fields for Name (with a required asterisk and a help icon), Code (with a required asterisk), Website (with a help icon), Phone number (with a help icon), and Email. The right column, under the 'REMIT ADDRESS' header, contains fields for Country (a dropdown menu currently showing 'United States'), Postal code, Street address (two stacked input fields), City, and State (a dropdown menu). The form is styled with a light gray background and white input fields.

Participation quiz!

What **two** fields are required for adding a new vendor?

-Vendor Name

-Vendor Code

What is an example of **one** optional field when adding a new vendor?

Website, phone number, email, postal code, address/city/state

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

Add New Rate Schedule

Vendor

* Choose or add... ▼

Commodity

* Choose ▼

Rate Schedule

*

Meter Information								
Read Date	Meter Number	Rate	Reading Type	Meter Reading		Difference	Multiplier X	Usage
				Previous	Present			
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Service 12/15/2016 to 01/15/2017 - 31 days

Create the cost center

- 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**
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 with your name as the parent). Let's create YOUR cost center.
4. Enter the name of the new cost center (INITIALS COST CENTER).
 - *Example: EDP's 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 the utility bill when creating the new account.

Create the account



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

Create the account

Hands-on exercise

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

Add New AccountCancelSave

Parent cost center EDP's Cost Center	Service effective 01/01/2010 – MM/DD/YYYY	Country United States
Vendor EDP's Utility Co	Description	Postal code 80111
Account number 1234-56789		Street address
Account name <input checked="" type="radio"/> Use account number <input type="radio"/>		
		City Englewood
		State CO

> ADDITIONAL PROPERTIES

Participation quiz!

Does an account number need to match your bill?

Yes.

Can an account be associated with more than one vendor?

No.

What is the difference between an account **NAME**
and account **NUMBER**?

Account Name: Common label for the account

Account Number: Should match the exact account number on the utility bill

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 (select the organization with your name). Let's create your organization (INITIALS ORG)
4. Enter the name of the organization
 - *Example: EDP's Org*
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
 - *Example: EDP's 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)

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).
3. Select the commodity (**ELECTRIC**) and use unit.
4. Enter the name of the meter and code.
 - *Example meter name: EDP's Place - ELE01*
 - *Example naming convention: Building name - commodity + increment*
 - *Meter code must be unique.*

Participation quiz!

What module does an organization live in?

Buildings & Meters Module

Give me an example(s) of an **OBJECT** that can be nested in your hierarchies?

Organizations

Cost Centers

True or False: A meter should live under an organization.

FALSE: A meter should live under a building.

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.

The screenshot shows a web application interface with a top navigation bar containing the following tabs: Bills, Billing Period Data, Calendarized Data, Normalized Data, Interval Data, Budgets (with a star icon), Savings, Properties (which is the active tab, indicated by a blue underline), and Flags. Below the navigation bar, there are two sub-tabs: 'Meter' (active) and 'Chargebacks'. The main content area is a light yellow box with a title '▼ Linked Accounts - 0'. Inside this box, there is a text message: '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.' At the bottom of this box is a dark blue button with a white plus icon and the text '+ 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 in the workbook, only the sheet named DataEntry is processed.

Setup spreadsheets

	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									

	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							

Wrap up

- ✓ Created all objects necessary to enter utility bill data
- ✓ Hands-on practice in EUM
- ✓ Reviewed setup sheets / bulk import



Questions?



CATALYST '24



Session survey