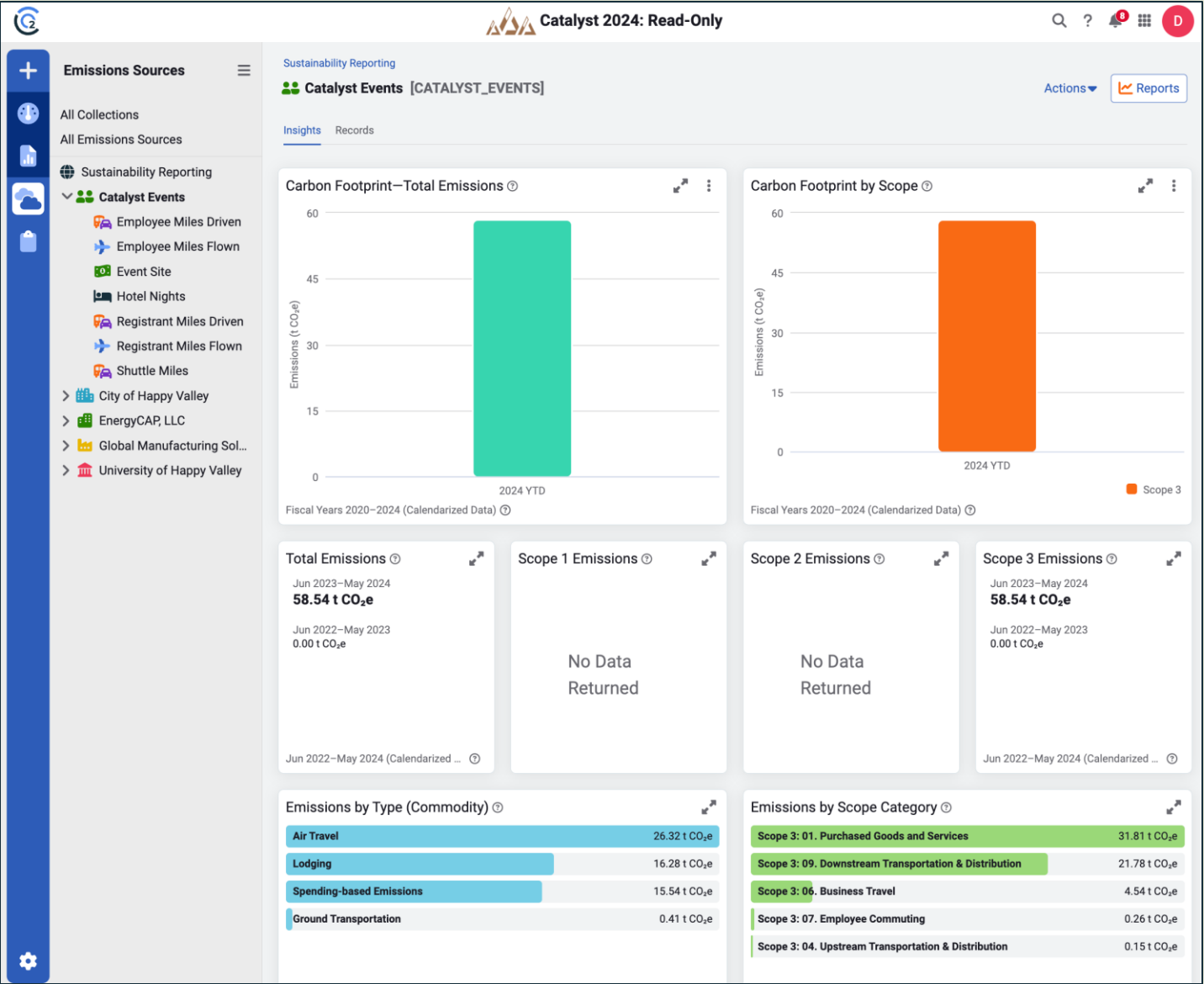




CATALYST '24

Welcome to Catalyst

Understanding the GHG impact of Catalyst (via CarbonHub)



Purchased carbon offsets for this event

New Record

CancelSave

Emissions source

Supplier

ENC Purchased OffsetsArbor Day Foundation

Create an emission source

Start date

End date

05/01/202406/01/2024

EMISSIONS DETAILS AND CALCULATIONS

UseCostDirect/Offset

Scope category

Scope 3 - Carbon Offsets and Adjustments (Scope 3)

Learn more about scope categories

Factor

Carbon Offset

Factor details

Quantity

Unit

60t CO₂e

Cost

Currency

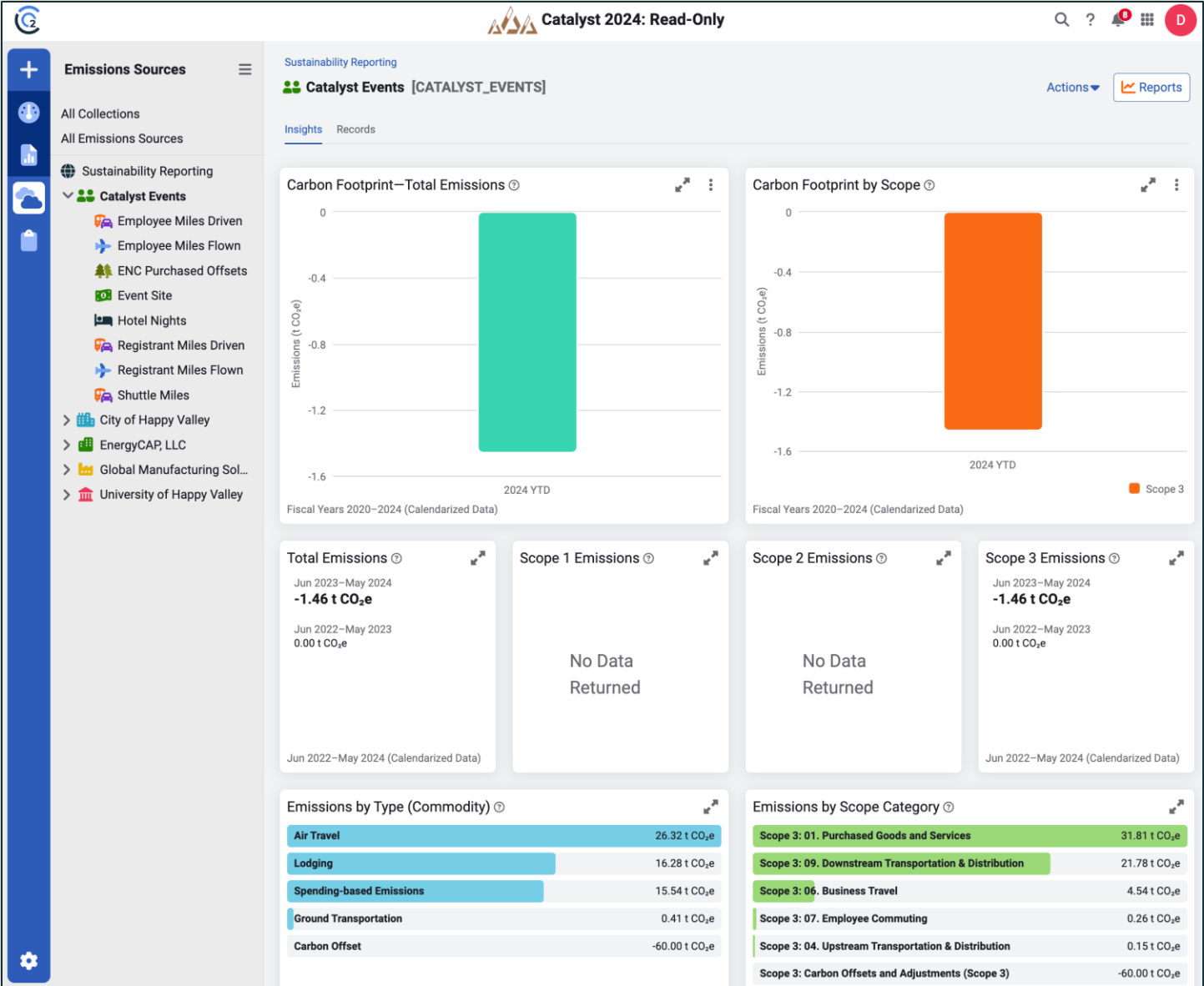
2700.00USD (\$)

NOTES

Offsets for the Scope 3 activities associated with the May 2024 Denver Catalyst event.

2024.05.10 - Arbor Day Offsets.pdf

Total emissions calculated after saving.



Welcome to Catalyst



Tom Patterson
Chief Executive Officer



What's new at EnergyCAP



David Ulmer
Chief Product & Technology Officer



Thank you for joining us in Denver!

Old and New Friends

Catalyst First-timers

Repeat Catalyst Attendees

Regional Training Conference (RTC)
Attendees

Coming from Near and Far

Driving distance

Less than 2 hours on planes

2-5 hours on planes

5-10 hours on planes

Others?

We're glad you're here - let us know how we can help!

EnergyCAP constantly innovates and delivers value to you



- **EnergyCAP's ongoing journey of innovation**
- **Going beyond UtilityManagement:**
 - SmartAnalytics
 - CarbonHub
- **A plethora of new EnergyCAP features to learn about!**
- **What's next?**
- **Making the most of your Catalyst experience**

EnergyCAP constantly innovates and delivers value to you

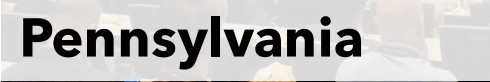


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- **What's next?**
- **Making the most of your Catalyst experience**

We've come a long way from our first Catalyst events over 15 years ago!



Recent EnergyCAP Catalyst Events



**We've been working toward our
vision to deliver an integrated
Energy & Sustainability ERP**

EnergyCAP's Energy and Sustainability ERP // The single source of truth



Financial-grade greenhouse gas accounting

Target and track emissions.

An advanced, holistic view of financial-grade emissions data across your business with automatically applied factors to meet your ESG reporting needs.

Customer Data Type:

GHG activities

Persona:

Sustainability



Portfolio-level energy and sustainability reporting

Manage and see it all.

Get accurate and reliable energy and utility data across your entire portfolio and streamline energy and accounting workflows.

Customer Data Type:

Utilities/Bill/Resources

Persona:

Finance/Energy



Real-time energy and sustainability analytics

Dive deep. Respond quickly.

Dive deep into real-time performance of assets, devices, and sensors. Make quick, data-driven decisions for high-performance, net-zero buildings.

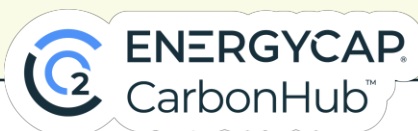
Customer Data Type:

Time-Series/Interval Data

Persona:

Energy/Facilities

EnergyCAP's Energy and Sustainability ERP // The single source of truth



Financial-grade greenhouse gas accounting

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An advanced, holistic view of financial-grade emissions data across your business with automatically applied factors to meet your ESG reporting needs.

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EnergyCAP's Energy and Sustainability ERP // The single source of truth

Get instant access to validated, actionable data you can trust to better manage resource consumption, reduce your carbon footprint, reach net-zero, and drive massive savings.



Financial-grade greenhouse gas accounting

Target and track emissions.

An advanced, holistic view of financial-grade emissions data across your business with automatically applied factors to meet your ESG reporting needs.

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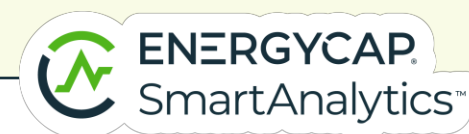
Get accurate and reliable energy and utility data across your entire portfolio and streamline energy and accounting workflows.

Customer Data Type:

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Real-time energy and sustainability analytics

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Dive deep into real-time performance of assets, devices, and sensors. Make quick, data-driven decisions for high-performance, net-zero buildings.

Customer Data Type:

Time-Series/Interval Data

Persona:

Energy/Facilities

CAPture Services: Bill CAPture, Bill Processing/Managed Services

EnergyCAP's diverse customer base

Government

City



State/Province



Federal



County/Federal



Education

Public School Districts



Public higher ed/University Systems



Private education



Utility Companies



Commercial

General commercial and retail



Ind/manufacturing



Energy services/consultants



Healthcare

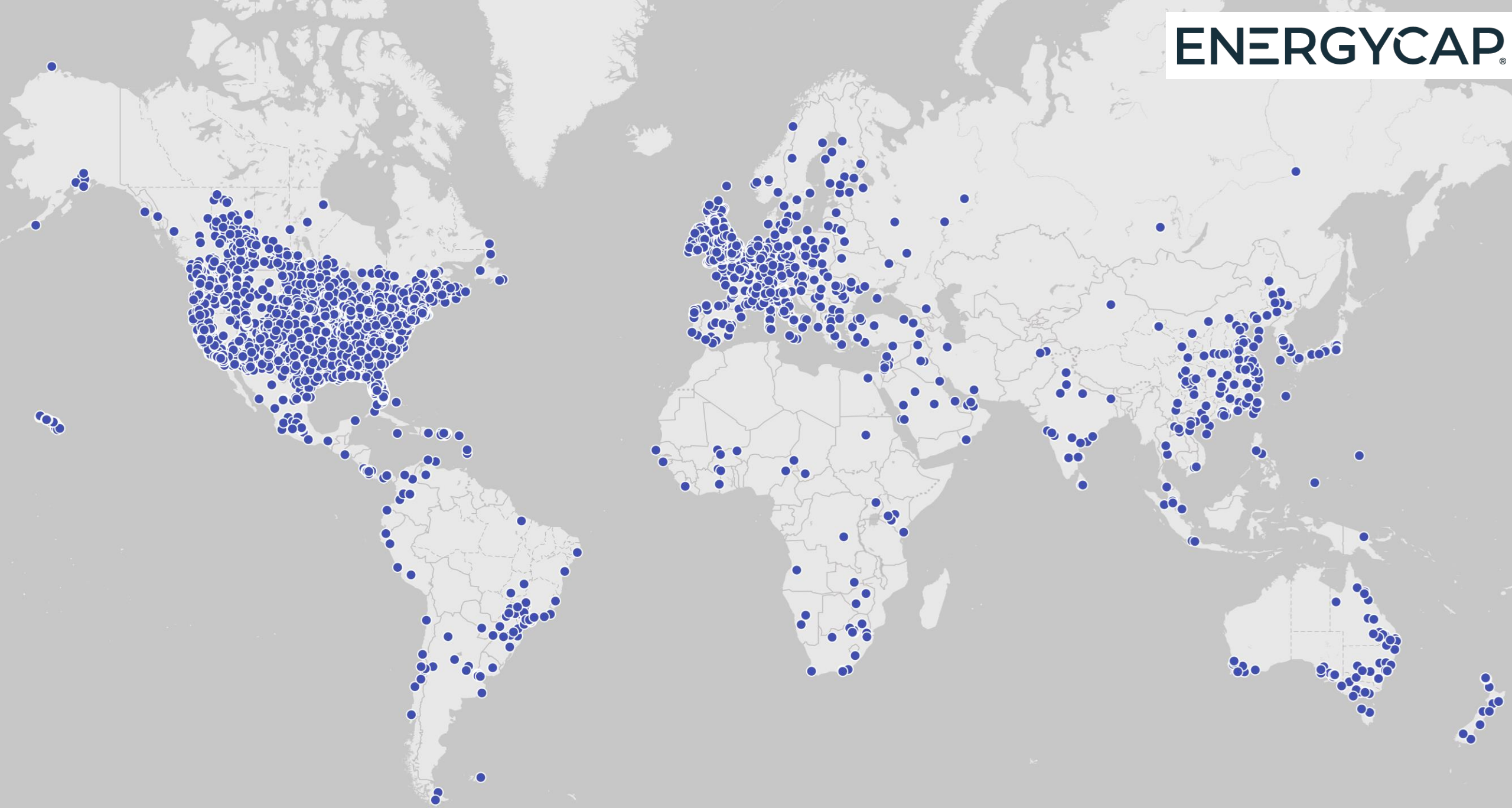


Transportation



Property management/Real estate





EnergyCAP constantly innovates and delivers value to you



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EnergyCAP constantly innovates and delivers value to you



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 - **SmartAnalytics**
 - **CarbonHub**
- **A plethora of new EnergyCAP features to learn about!**
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SmartAnalytics // Real-time energy and sustainability analytics



Capture

Capture real-time data from virtually any source and type of device.

Hierarchy

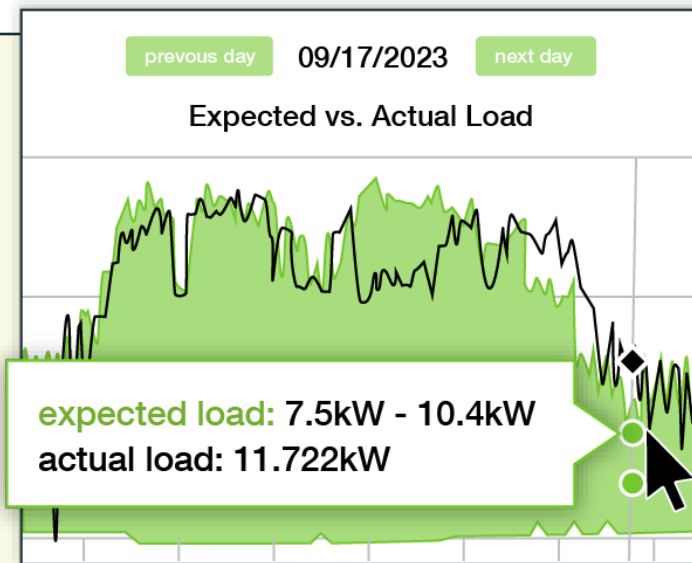
Groups

▼ Science Center

- Air quality
- ⚡ Air handler
- ⚡ Boiler
- ⚡ Water
- ⚡ Chiller
- ⚡ Production output (generic)
- ⚡ Pump**
- ⚡ Solar
- ⚡ EV charger
- ⚡ Daily visitors

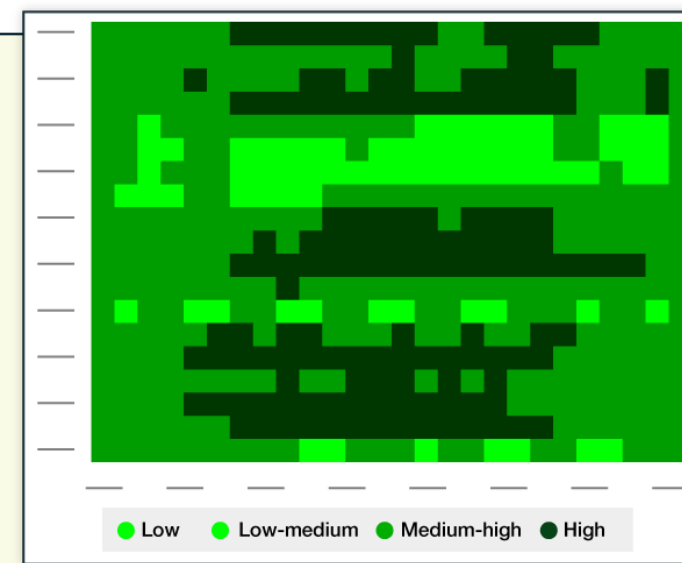
Monitor

Monitor data quality, detect outliers, and receive alerts and alarms.



Analyze

Access robust analysis and reporting functionality.

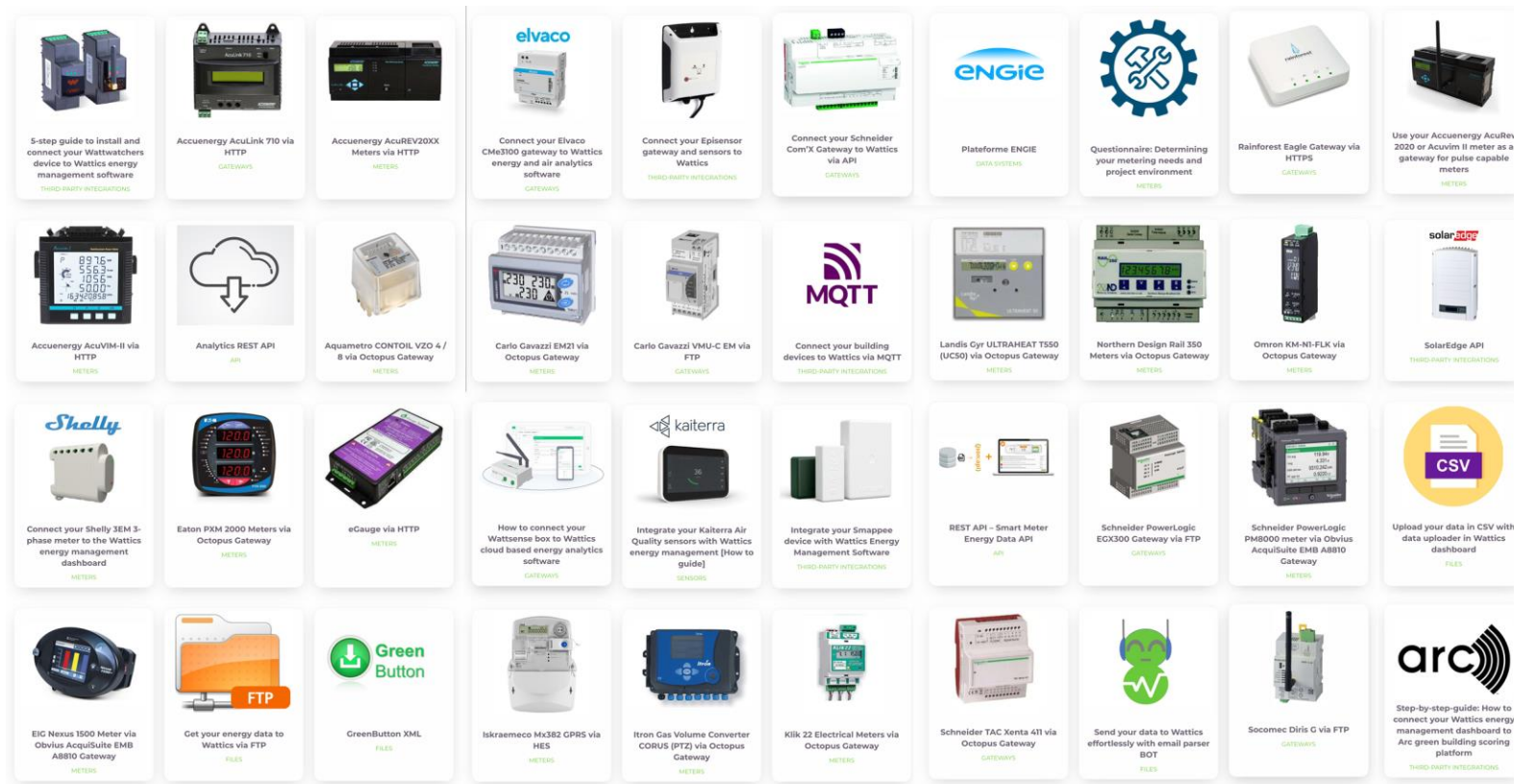


SmartAnalytics // Real-time energy and sustainability analytics

Many integration options/formats

- API
- Data systems
- Files
- Gateways
- Meters
- Sensors
- Solar and PV
- Third-Party Integrations

Connected devices and systems



Press the Easy Button: Get data directly from your utility



Utility Interval Data Integration (UIDI)

- EnergyCAP automatically retrieves interval data from your utility provider
- Data imported into SmartAnalytics for detailed analysis and reporting
- Over 135 vendors currently supported with more added each month
- Special discounts available for UIDI + SmartAnalytics for Catalyst attendees



SmartAnalytics Catalyst Sessions

- EnergyCAP 101: A beginner's guide to EnergyCAP's full suite of solutions
- EnergyCAP 101: SmartAnalytics for beginners
- EnergyCAP 201: Advanced scenarios for utilizing EnergyCAP's full suite of solutions
- M&V: Using Option B vs. Option C
- Customer Panel: Using real-time energy data
- CAPture bill and interval data smartly (*UIDI session*)

CarbonHub // Financial-grade greenhouse gas accounting



Calculate

Calculate Scope 1, 2, and 3 data across your business.

Scope 1 Emissions

Jan 2023–Dec 2023
57,921 t CO₂e

↓ 12.8%

Scope 2 Emissions

Jan 2023–Dec 2023
78,319 t CO₂e
Jan 2022–Dec 2022
70,921 t CO₂e

↑ 8%

Scope 3 Emissions

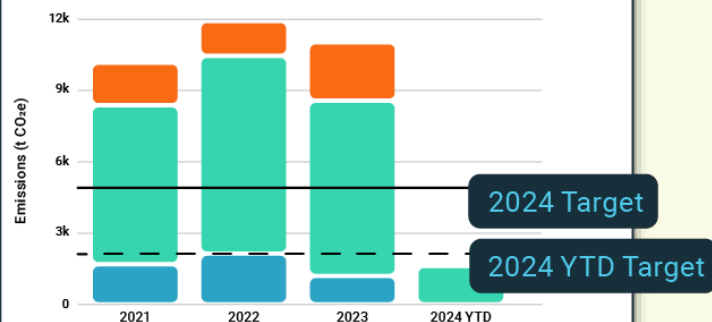
Jan 2023–Dec 2023
108,510 t CO₂e
Jan 2022–Dec 2022
70,215 t CO₂e

↓ 6.3%

Target

Set targets and track performance to your decarbonization goals.

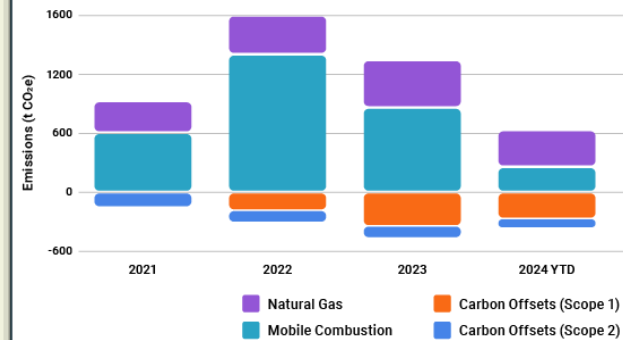
Total Emissions - Last 4 Fiscal Years



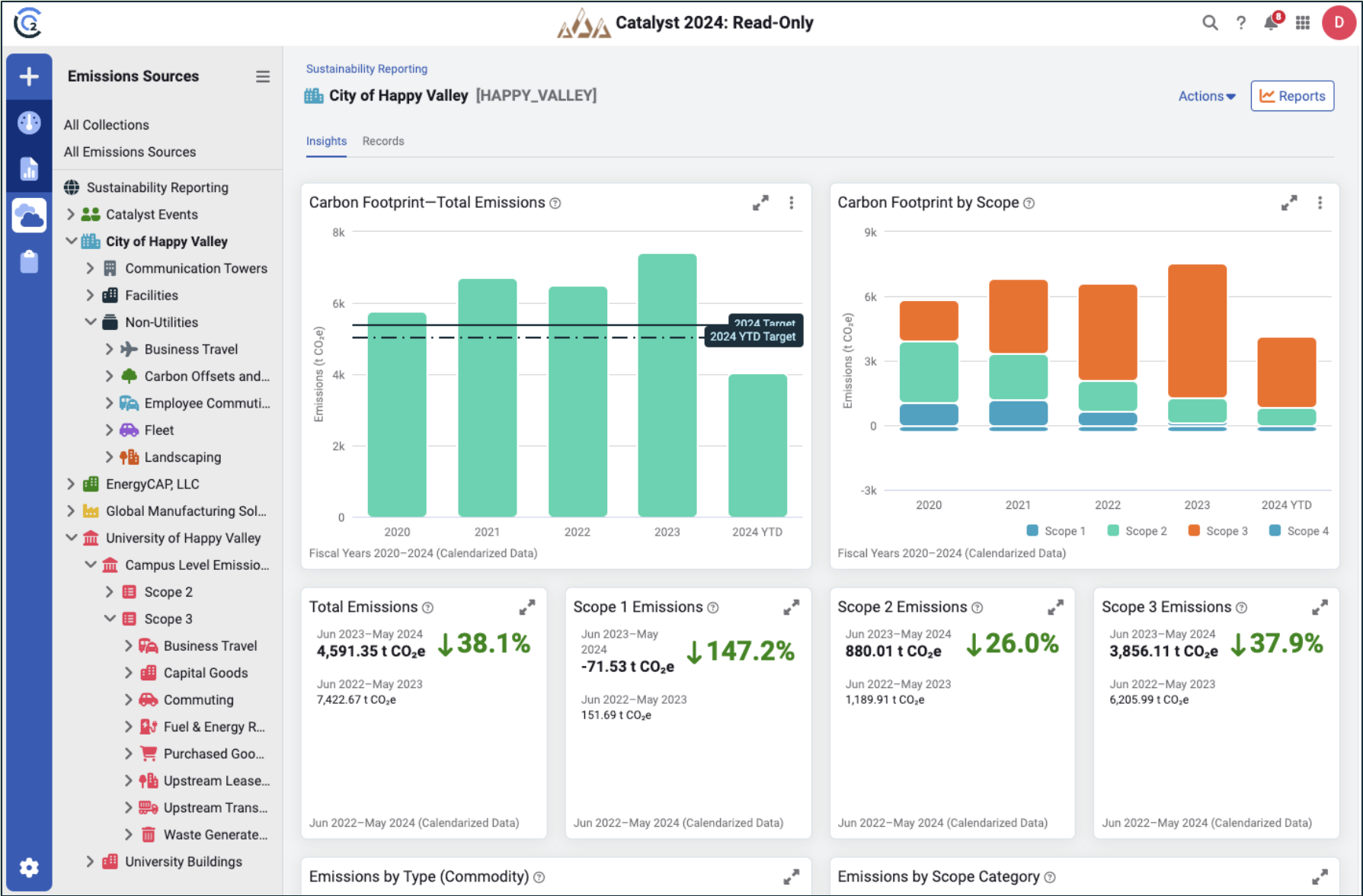
Report

Access robust analysis and GHG reporting functionality.

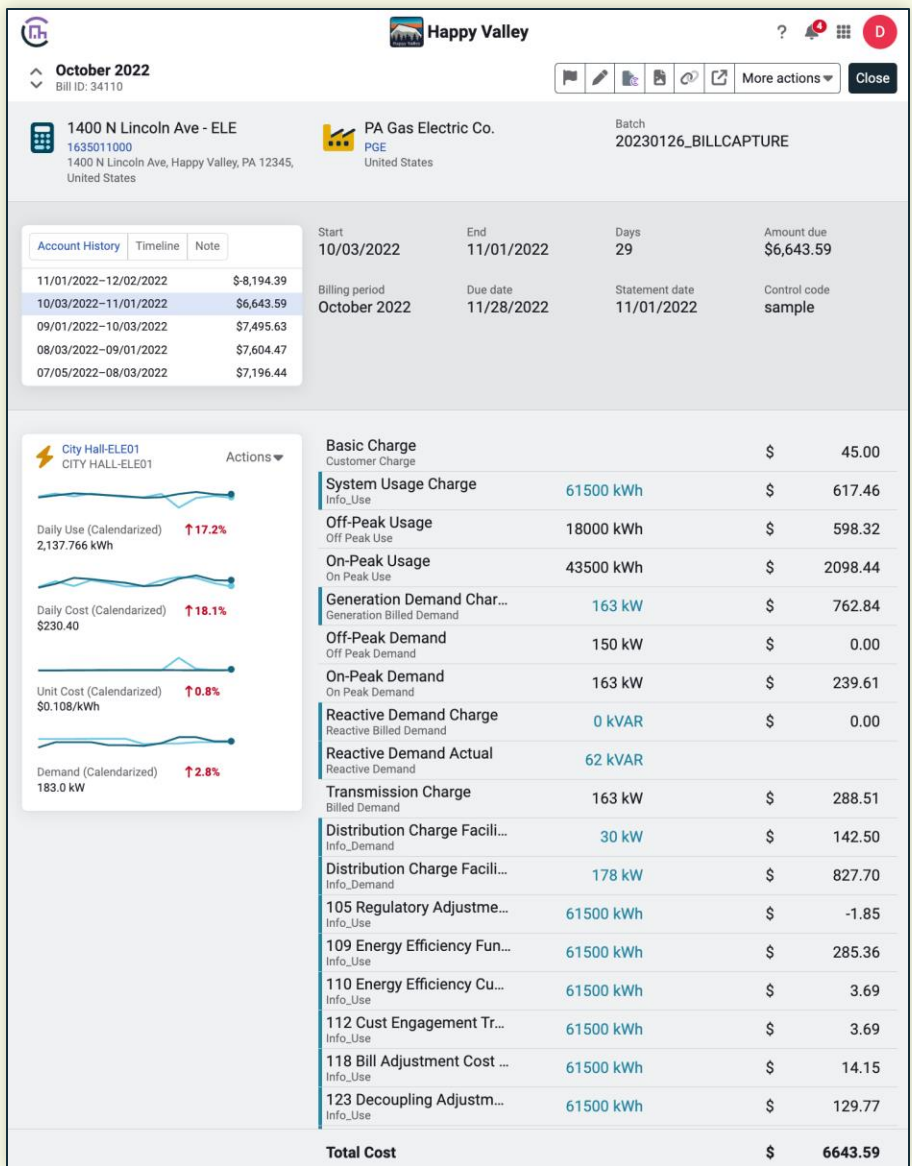
Scope 1 and 2 GHG Emissions by Category



CarbonHub // Dedicated sustainability hierarchy for easy reporting/analysis



CarbonHub // Financial-grade GHG from utility bills and more!



Edit Record 13807

Cancel Save

This emissions record was generated from an EnergyCAP UtilityManagement bill. [Edit these read-only properties in EUM](#)

Emissions source: City Hall-ELE01
Supplier: PA Gas Electric Co.

Create an emission source

Start date: 10/03/2022
End date: 11/01/2022

EMISSIONS DETAILS AND CALCULATIONS

Scope category: Scope 2 - Purchased Electricity

Learn more about scope categories

Factor: RFC East

Factor details

Quantity: 61500
Unit: kWh

Cost: 6643.59
Currency: USD (\$)

NOTES

Add notes here...

Select file... Browse

Double-dip on interval data and utility bills you're already tracking

Automatically reflect emission changes as utility bills are created/edited

Supplement source billing data with details in CarbonHub

Utilize advanced tools to track **Scope 3 impacts** directly from utility bills

CarbonHub // Easy emission and factor management

- **Unlimited emission source types**
- **Attach documents** to emissions records
- Easier than ever to record data by
 - Activity
 - Cost
 - Direct emissions
- Includes **over 3,000 global factors** and counting!
 - Ability for multiple versions over time
 - Easily import custom factors
 - Support for industry-specific factors (EcolInvent, exiobase, etc.)

New Record Cancel Save

Emissions source Supplier ?
✈ Long Haul Flights Delta Airlines
[Create an emission source](#)

Start date End date ?
01/01/2022 01/01/2023

EMISSIONS DETAILS AND CALCULATIONS

Use Cost Direct/Offset

Scope category ?
Scope 3 - 06. Business Travel
[Learn more about scope categories](#)

Factor ?
Air Travel - Long Haul (>= 2300 miles)

[Factor details](#)

Quantity ? Unit
40480 mi

Cost ? Currency
37500.00 USD (\$)

NOTES
Add notes here...

Select file... Browse

↑ **83750382** Edit Close

Emissions source
🚗 Pittsburgh Commuting

Start date End date
03/01/2023 04/01/2023

Scope category
Scope 3 - 07. Employee Commuting

Resource
🚗 Ground Transportation

Factor ?
Passenger car by mile

Category United States
Source U.S. EPA, GHG Emission Factors Hub

Quantity
10,455 mile

Total emissions **3.47 t CO₂e**

Carbon Dioxide	3.47 t CO ₂ e
Methane	0 t CO ₂ e
Nitrous Oxide	0 t CO ₂ e

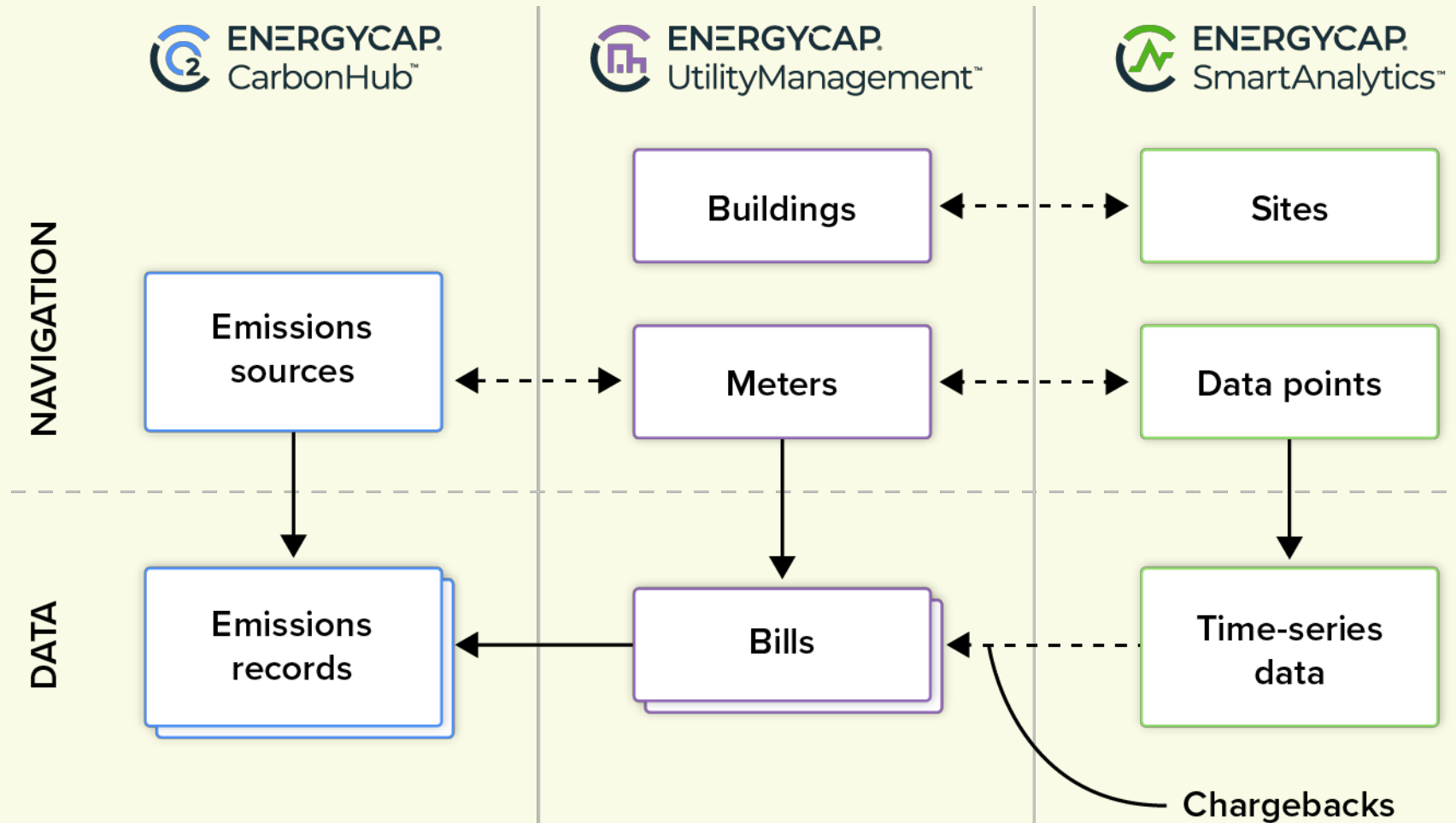
Notes
Add notes here

CarbonHub Catalyst Sessions

- EnergyCAP 101: A beginner's guide to EnergyCAP's full suite of solutions
- EnergyCAP 101: CarbonHub for beginners
- EnergyCAP 201: Advanced scenarios for utilizing EnergyCAP's full suite of solutions
- What's new with CarbonHub? (offered twice)

**Unlock additional value when
you combine products together**

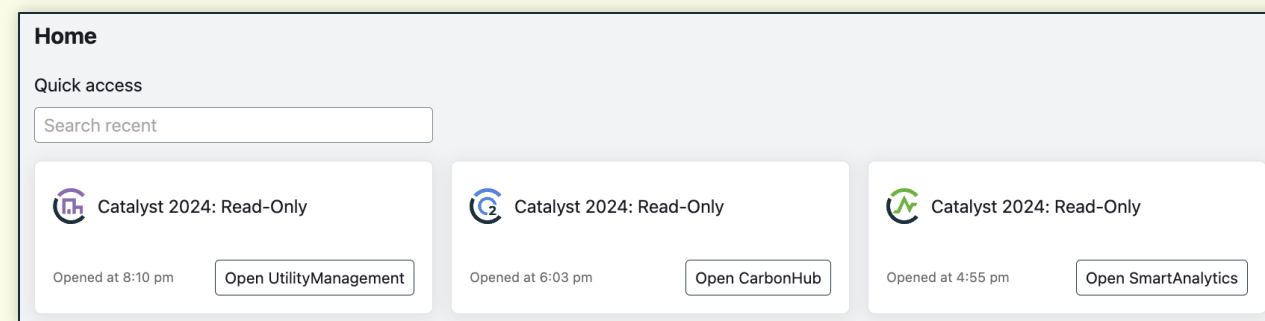
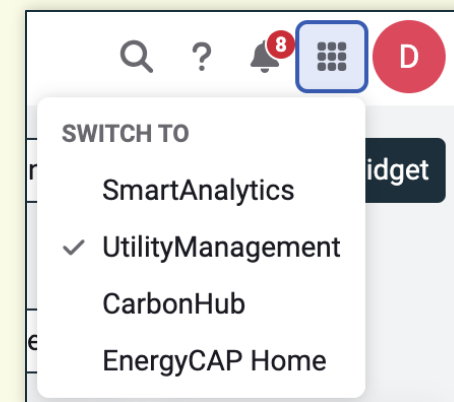
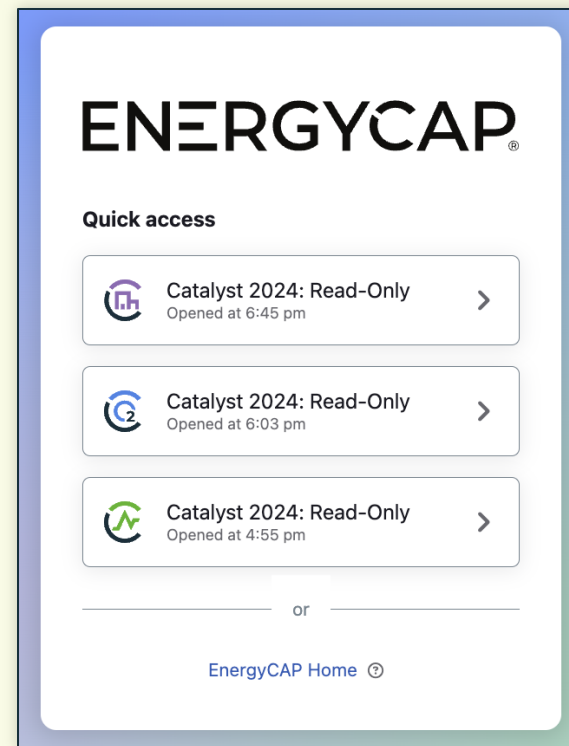
EnergyCAP's Energy and Sustainability ERP // Even more value together



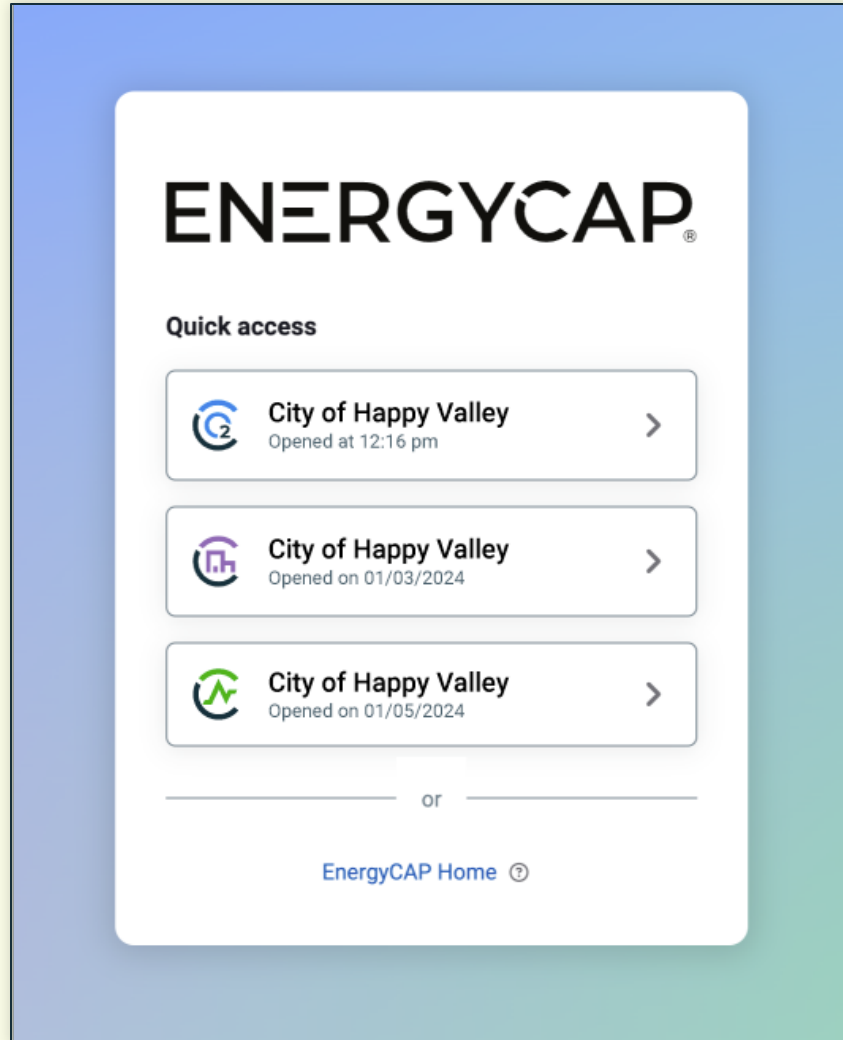
Try it for yourself at Catalyst

Access all products during Catalyst

- Personalized invitation emails sent from EnergyCAP
- Log in via EnergyCAP Home (login.energycap.com)
- **Catalyst 2024: Read-Only**
 - SmartAnalytics, UtilityManagement, and CarbonHub
- **Catalyst 2024: Read-Write**
 - UtilityManagement, and CarbonHub
 - Special folders for each attendee to “play”
- Use the application switcher to navigate between EnergyCAP Home and each product



EnergyCAP Home // Log in once and access all your products

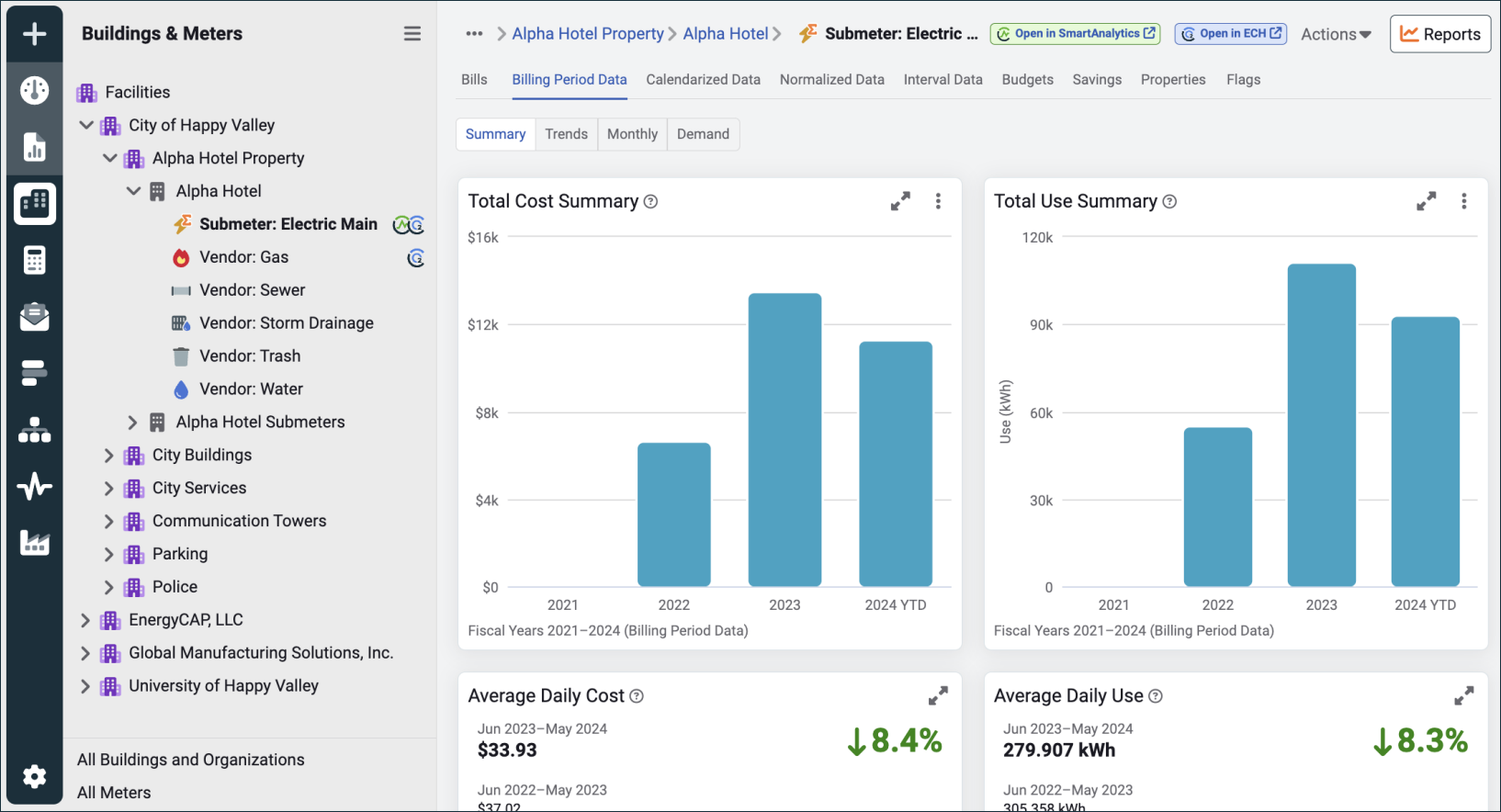


Combined login for all your EnergyCAP products

Integrated **single sign-on (SSO)** options

Auto-create authorized users

Connect your data and easily link between products



SWITCH TO

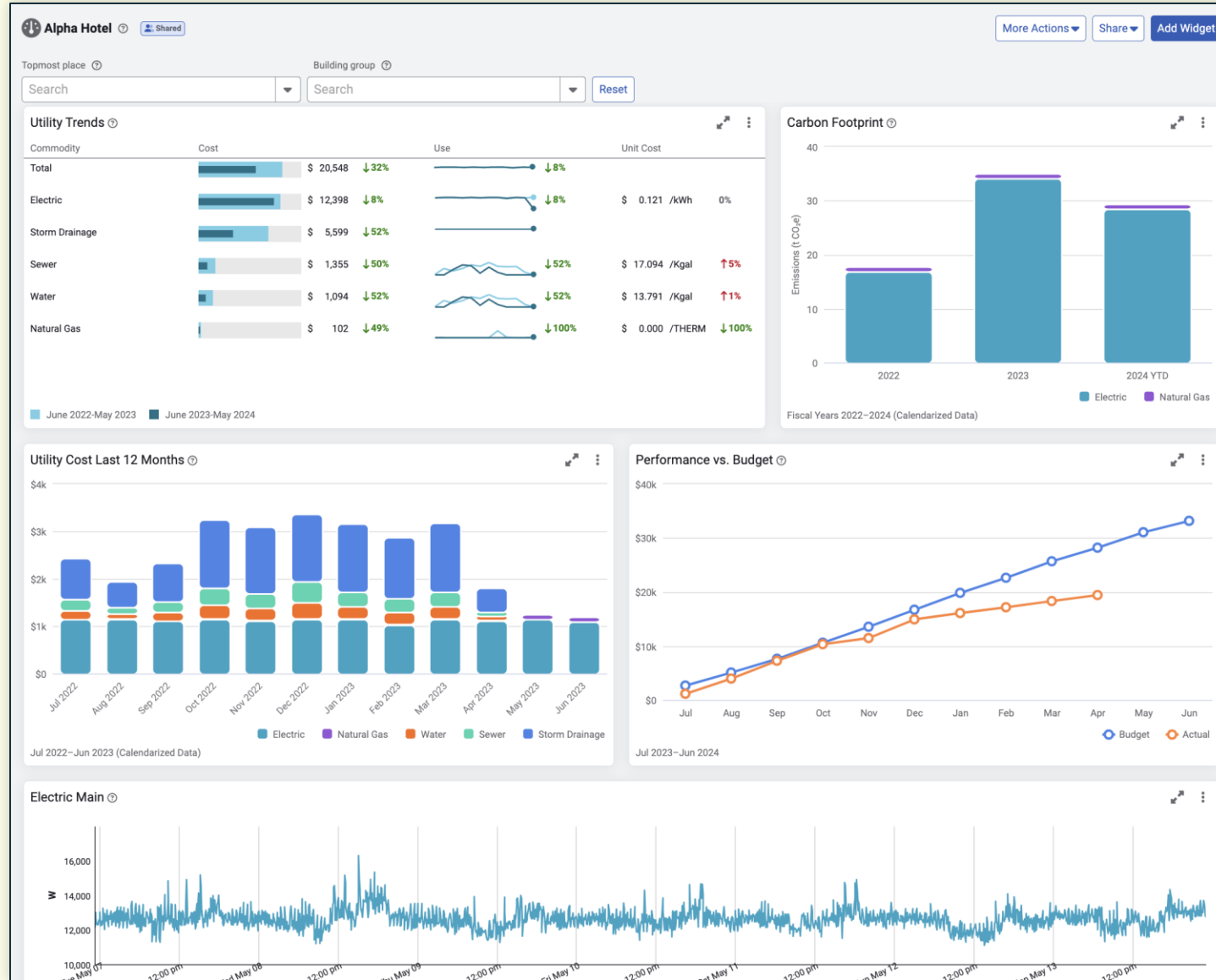
- SmartAnalytics
- UtilityManagement
- ✓ CarbonHub
- EnergyCAP Home

 **Open in ECH**

 **Open in EUM**

 **Open in SmartAnalytics**

Bring all your data together with unified EnergyCAP dashboards



EnergyCAP constantly innovates and delivers value to you



- **EnergyCAP's ongoing journey of innovation**
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 - **CarbonHub**
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Would you say EnergyCAP has a plethora of ~~piñatas~~ new features?

**There are so many new features
you can start using today!**



SmartAnalytics // Thermal Meters

New Data Point

Data Point Type * Chilled water ▾

Type Chilled water (Thermal)

Name * Union Building CW

Meter ID / Asset Tag * CW-99032

Energy Units * Reading x 1.0 = Ton*hr ▾ ?

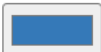
Process Sampling Rate * 15 minutes ▾

Reading * Odometer ▾ ?

Icon *



Icon Color



Parameter option * Simple ▾ ?

Parameter option * Complex ▾ ?

Parameters ?

Temperature ☒ Supply Temperature

☒ Return Temperature

☒ Delta-T

Reported in

☐ Celsius (°C) ☒ Fahrenheit (°F)

Flow ☒ Flow-rate

Pressure ☒ Supply Pressure

☒ Return Pressure

☒ Delta-P

Delta-T

Parameter display name * Delta-T: Union Building CW

Parameter ID * Add text

Units * Reading x 1.0 = °F ?

Icon *



Icon Color



Flow-rate

Parameter display name * Flow-rate: Union Building CW

Parameter ID * Add text

Units * Reading x 1.0 = Report Unit ?

Icon *



Icon Color

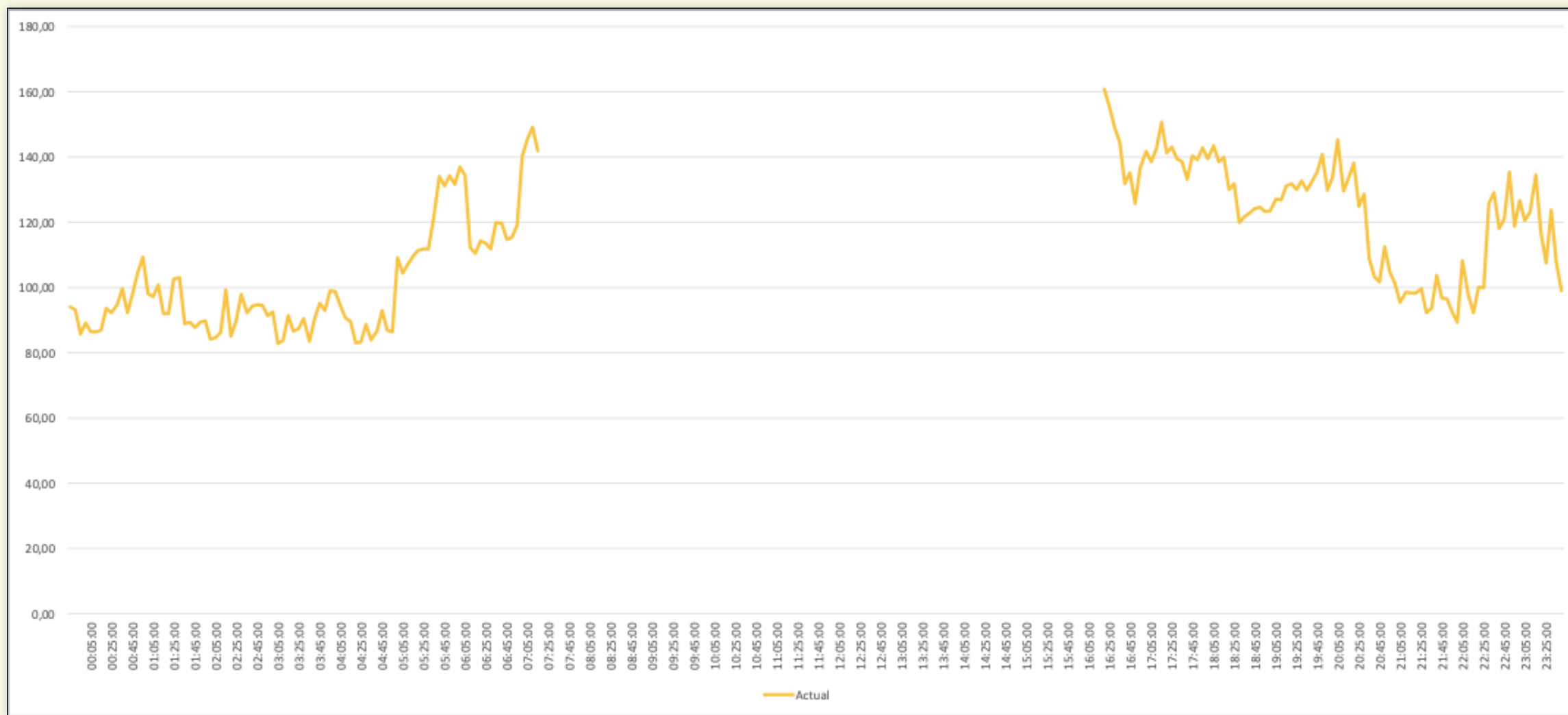


Supply Pressure

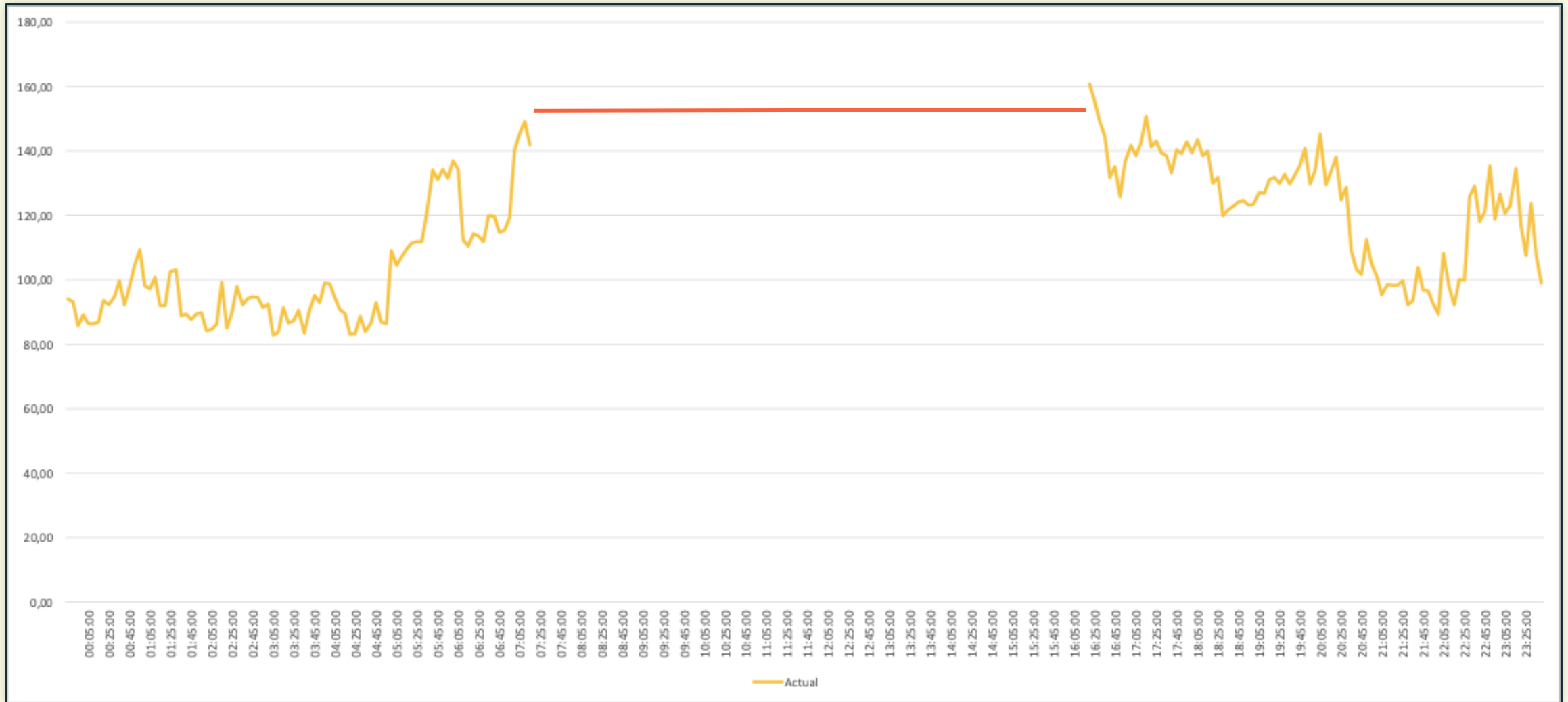
Parameter display name * Supply Pressure: Union Buildin

Parameter ID * Add text

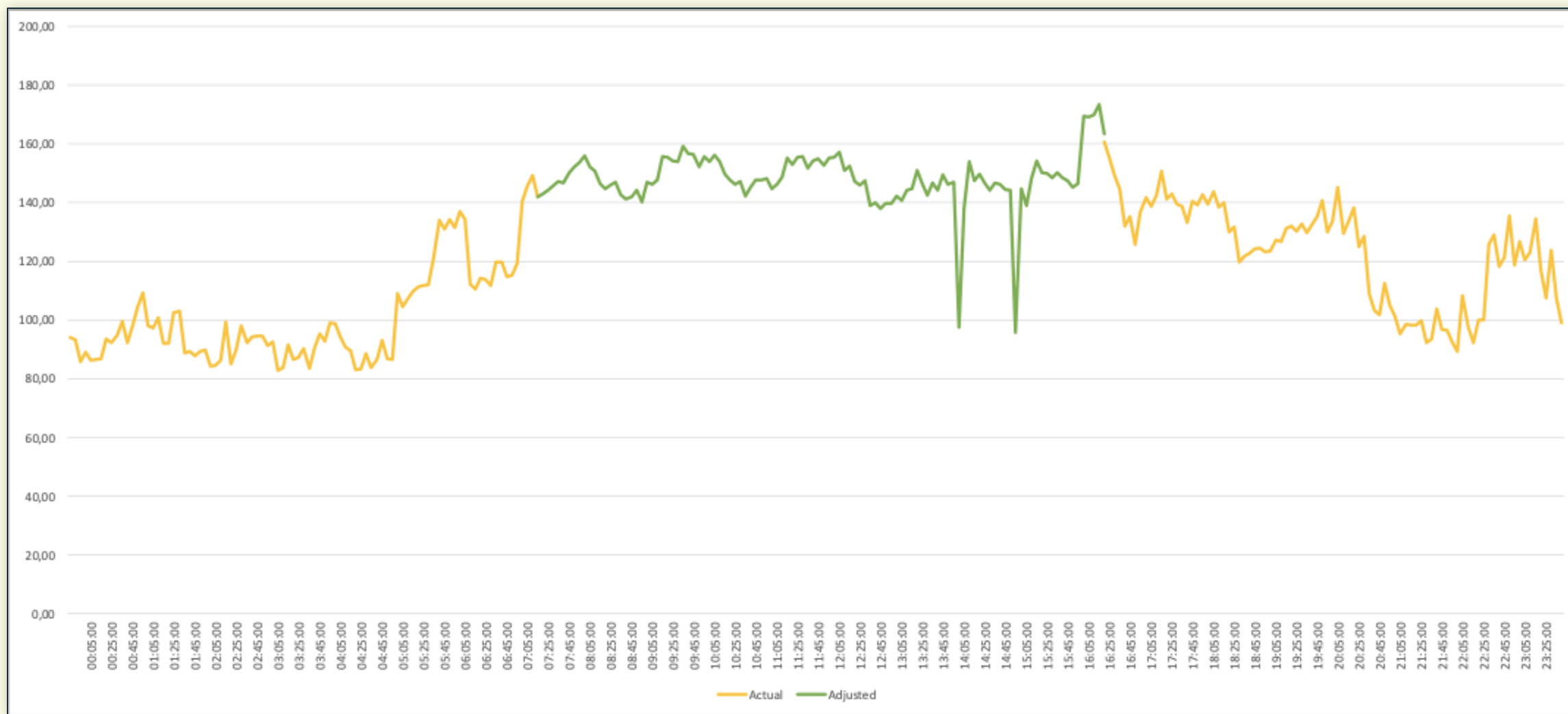
SmartAnalytics // Data Doctor: Backfill missing data based on load shapes



SmartAnalytics // Data Doctor: Backfill missing data based on load shapes

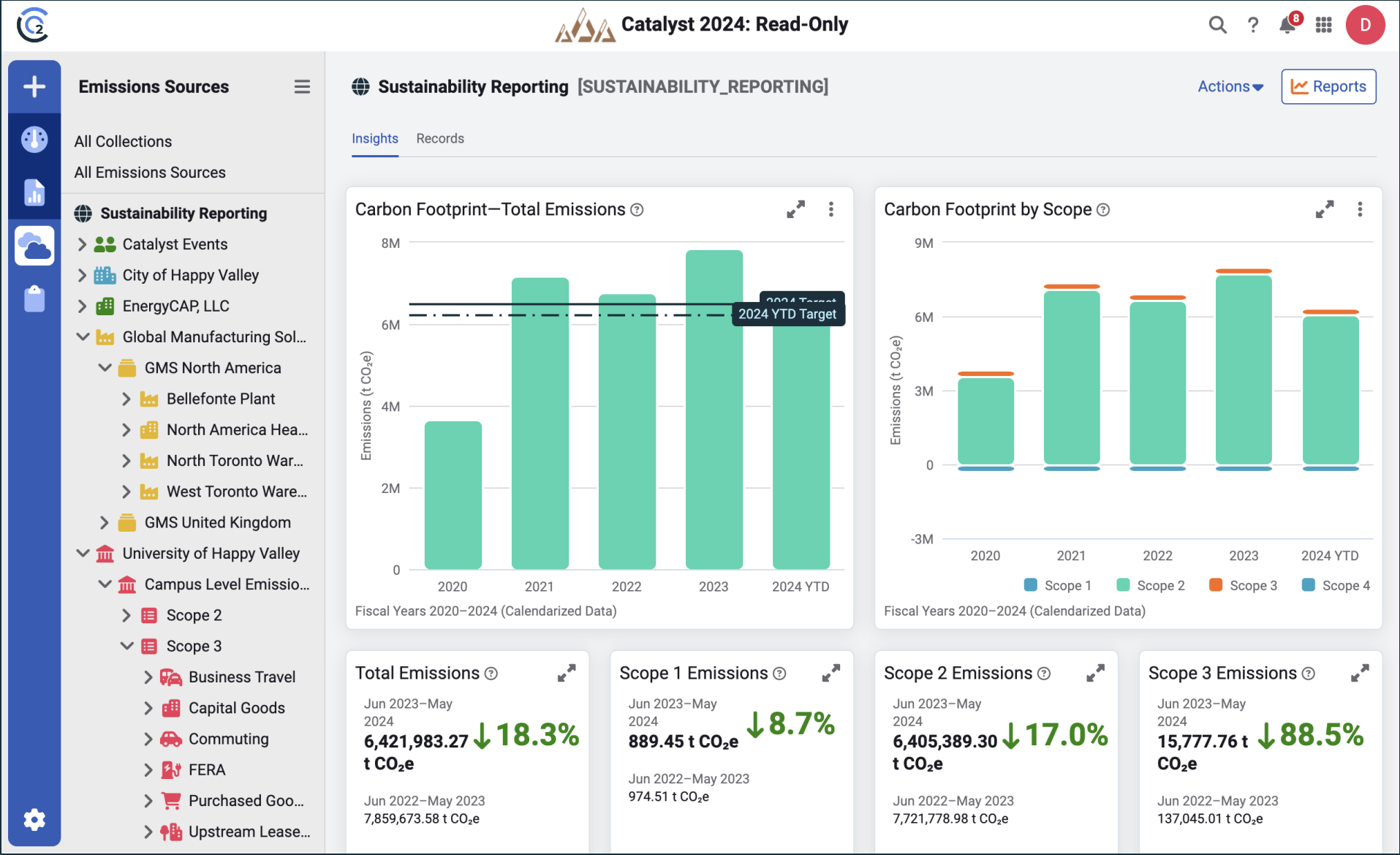


SmartAnalytics // Data Doctor: Backfill missing data based on load shapes





CarbonHub // Now available as a stand-alone product



CarbonHub // Dedicated GHG dashboard widgets

Add WidgetCancel

Search by name or keyword

Object

Display type

Data Type

All Objects


▼

All Display Types

▼


Greenhouse Gas

▼

**Carbon Footprint**


Greenhouse Gas (GHG) emissions by scope, category or commodity for a specified number of calendar years. Carbon Dioxide equivalent (CO₂e) is used to demonstrate the relative impact of all emissions.

Add

**GHG Rankings**


Rank GHG scope categories based on carbon emissions over a period of time.

Add

**GHG Rankings by Building**


Rank buildings or building groups based on carbon emissions over a period of time. Can be filtered by emissions or emissions per area.

Add

**Greenhouse Gas KPI**

The last 12 months of data compared to the previous 12 months. Group data by GHG scope, scope category, or a topmost place.

Add

**Greenhouse Gas Performance**

Year-to-year comparison of scope, scope category, or commodity emissions totals.

Add

CarbonHub // Simple, but robust options to record emissions data

New Record

CancelSave

Emissions source

Supplier ⓘ

✈ Long Haul Flights

▼

Delta Airlines

▼

[Create an emission source](#)

Start date

End date ⓘ

01/01/2022

📅

01/01/2023

📅

EMISSIONS DETAILS AND CALCULATIONS

Use

Cost

Direct/Offset

Scope category ⓘ

Scope 3 - 06. Business Travel

▼

[Learn more about scope categories](#)

Factor ⓘ

Air Travel - Long Haul (>= 2300 miles)

▼

[Factor details](#)

Quantity ⓘ

Unit

40480

mi

▼

Cost ⓘ

Currency

37500.00

USD (\$)

▼

NOTES

Add notes here...

Select file...

Browse

Import Multiple Records

CancelImport

Use a Template

Use a Format

Need help choosing? ⓘ

1. To create new records, [download a template](#) 📄

2. Upload completed template to import the records.

✳ Select file...

Browse

[Learn more about using this spreadsheet](#) 🔗

ENERGYCAP · ©EnergyCAP, LLC

CarbonHub // Simple, but robust options to record emissions data

New Record Import Format

CancelSave

Name

*

Date format

MM/DD/YYYY

Header rows to skip

0

Notes

☐ Create supplier record

Record information

Import file columns

Emissions Source Code

* Select column

Start Date

* Select column

End Date

* Select column

Supplier

Select column

Notes

Select column

Emissions calculation details (at least one is required)

Use

* Select column

Search

Cost

* Select column

Search

Direct/Offset

* Select column

Search

Record Imports

Manage Import FormatsImport Records

Imported

MM/DD/YYYY

Imported by

Search by user

Import method

Select

Status

All Statuses

Reset

Imported	Imported By	Imported File	Successful	Errors	Status
04/30/2024 6:23 am	Lalit Agarwal	<div>T</div> setupsheet.xlsx	226 records	0 errors	Successful
04/30/2024 6:21 am	Lalit Agarwal	<div>T</div> setupsheet.xlsx	0 records	226 errors	Complete with Errors
04/19/2024 4:09 pm	Lalit Agarwal	<div>T</div> setupsheet.xlsx	8593 records	21 errors	Complete with Errors
04/19/2024 12:16 pm	Lalit Agarwal	<div>T</div> setupsheet.xlsx	8593 records	21 errors	Complete with Errors
04/19/2024 12:07 pm	Lalit Agarwal	<div>T</div> setupsheet.xlsx	8593 records	21 errors	Complete with Errors
04/19/2024 11:29 am	Lalit Agarwal	<div>T</div> setupsheet.xlsx	8593 records	21 errors	Complete with Errors
04/19/2024 11:26 am	Lalit Agarwal	<div>T</div> setupsheet.xlsx	8593 records	21 errors	Complete with Errors
03/24/2024 3:22 pm	Lalit Agarwal	<div>T</div> setupsheet.xlsx	42 records	0 errors	Successful
09/11/2023 12:12 pm	Dave Mosemann	<div>T</div> setupsheet.xlsx	1 records	0 errors	Successful
09/11/2023 10:21 am	Dave Mosemann	<div>T</div> setupsheet.xlsx	1 records	0 errors	Successful
09/05/2023 10:26 am	Dave Mosemann	<div>T</div> setupsheet.xlsx	0 records	27 errors	Complete with Errors

1-11 of 11 record imports

Imported method:

T

 Template

F

 Format



ENERGYCAP®
Bill CAPtureSM



ENERGYCAP®
UtilityManagementTM

Bill CAPture // Fully integrated with UtilityManagement

- **Single login** to manage Bill CAPture and UtilityManagement
- **End-to-end visibility** into what's being processed by each team member
- Remove problematic bills and **keep your workflow moving**
- Integrated reporting

Bill CAPture // Fully integrated with UtilityManagement

+

Bills

≡

My Bill Lists

Flagged Bills

Working List

Bill Lists Shared with Me

Batches

Bill Imports

Bill CAPture

Accruals Log

Bill Export

Not Approved

Held from Export

Waiting to Export for Pay...

Waiting for Export to GL

Bill CAPture

Uploads

Statistics

Transactions Log

File name

Upload date

Uploaded by

Category

Status

Contains...

Last 60 days

Search users

All Categories

All Statuses

Reset

Filename	Upload Date	Uploaded by	Status	Batch
➤ Bills_20240507_103800839.zip	05/07/2024 10:41 am	Unknown	Complete with errors	Bills_20240507_103800839
➤ CityOfHappyValley_20240503_142314266.zip	05/03/2024 4:39 pm	Dave Mosemann	Complete with errors	CityOfHappyValley_20240503_142314266
➤ CityOfHappyValley_20240503_142357908.zip	05/03/2024 4:37 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142357908
➤ CityOfHappyValley_20240503_142342577.zip	05/03/2024 4:36 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142342577
➤ CityOfHappyValley_20240503_142401278.zip	05/03/2024 4:34 pm	Dave Mosemann	Complete with errors	CityOfHappyValley_20240503_142401278
➤ CityOfHappyValley_20240503_142409969.zip	05/03/2024 4:32 pm	Dave Mosemann	Complete with errors	CityOfHappyValley_20240503_142409969
➤ CityOfHappyValley_20240503_142338708.zip	05/03/2024 4:30 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142338708
➤ CityOfHappyValley_20240503_142310911.zip	05/03/2024 4:30 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142310911
➤ CityOfHappyValley_20240503_142424147.zip	05/03/2024 4:29 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142424147
➤ CityOfHappyValley_20240503_142317329.zip	05/03/2024 4:27 pm	Dave Mosemann	Complete with errors	CityOfHappyValley_20240503_142317329
➤ CityOfHappyValley_20240503_142416289.zip	05/03/2024 4:22 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142416289
➤ CityOfHappyValley_20240503_142413699.zip	05/03/2024 4:21 pm	Dave Mosemann	Complete with errors	CityOfHappyValley_20240503_142413699
➤ CityOfHappyValley_20240503_142308815.zip	05/03/2024 4:20 pm	Dave Mosemann	Complete with errors	CityOfHappyValley_20240503_142308815
➤ CityOfHappyValley_20240503_142353720.zip	05/03/2024 4:18 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142353720
➤ CityOfHappyValley_20240503_142337250.zip	05/03/2024 4:18 pm	Dave Mosemann	Complete with errors	CityOfHappyValley_20240503_142337250
➤ CityOfHappyValley_20240503_142406340.zip	05/03/2024 4:16 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142406340
➤ CityOfHappyValley_20240503_142329706.zip	05/03/2024 4:15 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142329706
➤ CityOfHappyValley_20240503_142419294.zip	05/03/2024 4:13 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142419294

1

2

3

4

5

1-100 of 491 uploads

Bill CAPture Upload

Cancel

Select one or more zip files of bills to upload and select the category for each zip file.

Each zip file becomes a separate batch.

Select Zip Files...

Bill CAPture // Fully integrated with UtilityManagement

Bill CAPture

UploadsStatisticsTransactions Log

File name

Contains...

Upload date

Last 60 days

Uploaded by

Search users

Category

All Categories

Type	File	Upload Date	Uploaded By	Count	Imported Date	Batch
FTP Image File	484808\$happyvalley\$20240507.14.41...	05/07/2024	Unknown	5	05/07/2024 10:46 ...	Bills_20240507_103800839
FTP Image File	482782\$happyvalley\$20240503.20.39...	05/03/2024	Dave Mosemann	126	05/03/2024 5:14 pm	CityOfHappyValley_20240503_14234...
FTP Image File	482781\$happyvalley\$20240503.20.37...	05/03/2024	Dave Mosemann	16	05/03/2024 5:13 pm	CityOfHappyValley_20240503_14233...
FTP Image File	482780\$happyvalley\$20240503.20.36...	05/03/2024	Dave Mosemann	62	05/03/2024 5:13 pm	CityOfHappyValley_20240503_14234...
FTP Image File	482778\$happyvalley\$20240503.20.34...	05/03/2024	Dave Mosemann	41	05/03/2024 5:12 pm	CityOfHappyValley_20240503_14240...
FTP Image File	482777\$happyvalley\$20240503.20.32...	05/03/2024	Dave Mosemann	43	05/03/2024 5:12 pm	CityOfHappyValley_20240503_14240...
FTP Image File	482776\$happyvalley\$20240503.20.30...	05/03/2024	Dave Mosemann	7	05/03/2024 5:12 pm	CityOfHappyValley_20240503_14233...
FTP Image File	482775\$happyvalley\$20240503.20.30...	05/03/2024	Dave Mosemann	10	05/03/2024 5:12 pm	CityOfHappyValley_20240503_14231...
FTP Image File	482774\$happyvalley\$20240503.20.29...	05/03/2024	Dave Mosemann	70	05/03/2024 5:11 pm	CityOfHappyValley_20240503_14242...
FTP Image File	482773\$happyvalley\$20240503.20.27...	05/03/2024	Dave Mosemann	89	05/03/2024 5:11 pm	CityOfHappyValley_20240503_14231...
FTP Image File	482772\$happyvalley\$20240503.20.22...	05/03/2024	Dave Mosemann	25	05/03/2024 5:10 pm	CityOfHappyValley_20240503_14241...
FTP Image File	482771\$happyvalley\$20240503.20.21...	05/03/2024	Dave Mosemann	18	05/03/2024 5:10 pm	CityOfHappyValley_20240503_14241...
FTP Image File	482770\$happyvalley\$20240503.20.20...	05/03/2024	Dave Mosemann	60	05/03/2024 5:10 pm	CityOfHappyValley_20240503_14230...
FTP Image File	482769\$happyvalley\$20240503.20.18...	05/03/2024	Dave Mosemann	44	05/03/2024 5:10 pm	CityOfHappyValley_20240503_14235...

Bill CAPture

UploadsStatisticsTransactions Log

Expiration date

01/01/2025

Days until expiration

231

Processing Summary

Live (6,653 of 12,000 Contracted)

6,653 Actual

0 Adjustments

5,347 Remaining

Historical (0 of 0 Contracted)

0 Actual

0 Adjustments

Setup Enrollments (0 of 0 Contracted)

0 Actual

0 Adjustments

Monthly Details

Year	Month	Transaction	Count
2024	May	FTP Image File	4867
2024	Apr	FTP Image File	1774
2024	Mar	FTP Image File	12

Bill CAPture // Migration schedule

- Already begun migrating customers to the unified process
 - On track to complete transition by the end of June
- You will be contacted before your organization's migration
- Let us know if you would like to move sooner



UtilityManagement // Integrated currency conversion and reporting

February 2024

Bill ID: 60263

London Headquarters-NG

603572939

United Kingdom

British Gas

BRITISHGAS

Batch

HAPPYVALLEY\$20240430.20.33.38_X10

Account History

Timeline

Note

03/08/2024–04/07/2024	Mar 2024	E	\$429.83
02/07/2024–03/07/2024	Feb 2024		\$1,214.14
01/07/2024–02/07/2024	Jan 2024		\$2,335.44
01/01/2024–01/07/2024	Jan 2024	E	\$196.64
11/08/2023–12/07/2023	Nov 2023		\$1,047.05

Start

02/07/2024

End

03/07/2024

Days

29

Amount due

£948.91

Billing period

February 2024

Due date

03/26/2024

Statement date

03/12/2024

Control code

sample

Invoice number

828899620

London Headquarters-NG01

603572939-NG01

Daily Use (Calendarized)

779.887 kWh

Daily Cost (Calendarized)

\$48.79

Unit Cost (Calendarized)

\$0.063/kWh

Gas Charges

Use

19324.57 kWh

£0.034200 / kWh

£

660.90

Standing Charge

Charge

£

0.00

Climate Change Levy

Info_Use

19324.57 kWh

£0.006720 / kWh

£

129.86

VAT

Tax

£

158.15

Meter Subtotal

19324.57 kWh

£0.049104 / kWh

£

948.91

Current Charges (ECBC)

Info_Cost

£

948.91

Amount Due (ECBC)

Total Pay Amount

£

948.91

Account Subtotal

£

0.00

Total Cost

USD \$1,214.14

GBP £948.91

UtilityManagement // Fully customizable commodities and units

Commodities and Units

Actions

Done

Commodity

Category ?

Status ?

Search

Choose or add...

Unused

Add Category

Add Commodity

Reset

Commodity	Rollup unit ?	Type	Description	Conversion ?
Batteries Recycling	lb	Custom		Not included in energy use reporting
CFL Recycling	lb	Custom		Not included in energy use reporting
Clamshell Recycling	lb	Custom		Not included in energy use reporting
Energy Recovery	lb	Custom		Not included in energy use reporting
Ash		System		Not included in energy use reporting
Biomass	MMBtu	System		1 MMBtu × 1 = 1 MMBtu
Butane	MMBtu	System		Not included in energy use reporting
Cable	MMBtu	System		Not included in energy use reporting
Chemical		System		Not included in energy use reporting
Coal	ST	System		1 ST × 20.745 = 1 MMBtu
Cogeneration		System		Not included in energy use reporting
Compressed Natural Gas		System		Not included in energy use reporting
Emissions by Cost	Value	System		Not included in energy use reporting
Emissions by Count	Value	System		Not included in energy use reporting
Emissions by Weight	ST	System		Not included in energy use reporting
Energy	MMBtu	System		1 MMBtu × 1 = 1 MMBtu
Ethanol	gal	System		Not included in energy use reporting
Hot Water	MMBtu	System		1 MMBtu × 1 = 1 MMBtu

Add Commodity

Cancel

Save

Name

Abbreviation ?

Icon

Plastic Cups

PLC

Edit...

Description

REPORTING AND ROLLUPS

Category ?

Rollup unit ?

Choose or add...

Count

☐ This commodity can be converted to energy.

UtilityManagement // Fully customizable commodities and units

- Unlimited number of commodities
- Choose your icons and descriptions
- Specify which commodities roll-up to energy units
- Advanced unit conversions available
 - Cross-commodity
 - Date-effective

But wait...there's more!

UtilityManagement // Commodity Categories!

Electricity Use



Water Use



UtilityManagement // Commodity Categories!

Edit Category

Cancel

Save

i Changes to this category's rollup unit affect all commodities that belong to the category. These updates may take up to 24 hours.

Name

Electricity

Category rollup unit **?**

kWh

Electricity

Electricity

⚡ Electric

💡 Lighting

☀️ Solar PV

Sewer

🚰 Sewer

🌊 Storm Drainage

❄️ Chilled Water

🌱 Compost

Sewer

Total Cost Summary **?**

\$800k

\$600k

\$400k

\$200k

\$0

2021

2022

2023

2024 YTD

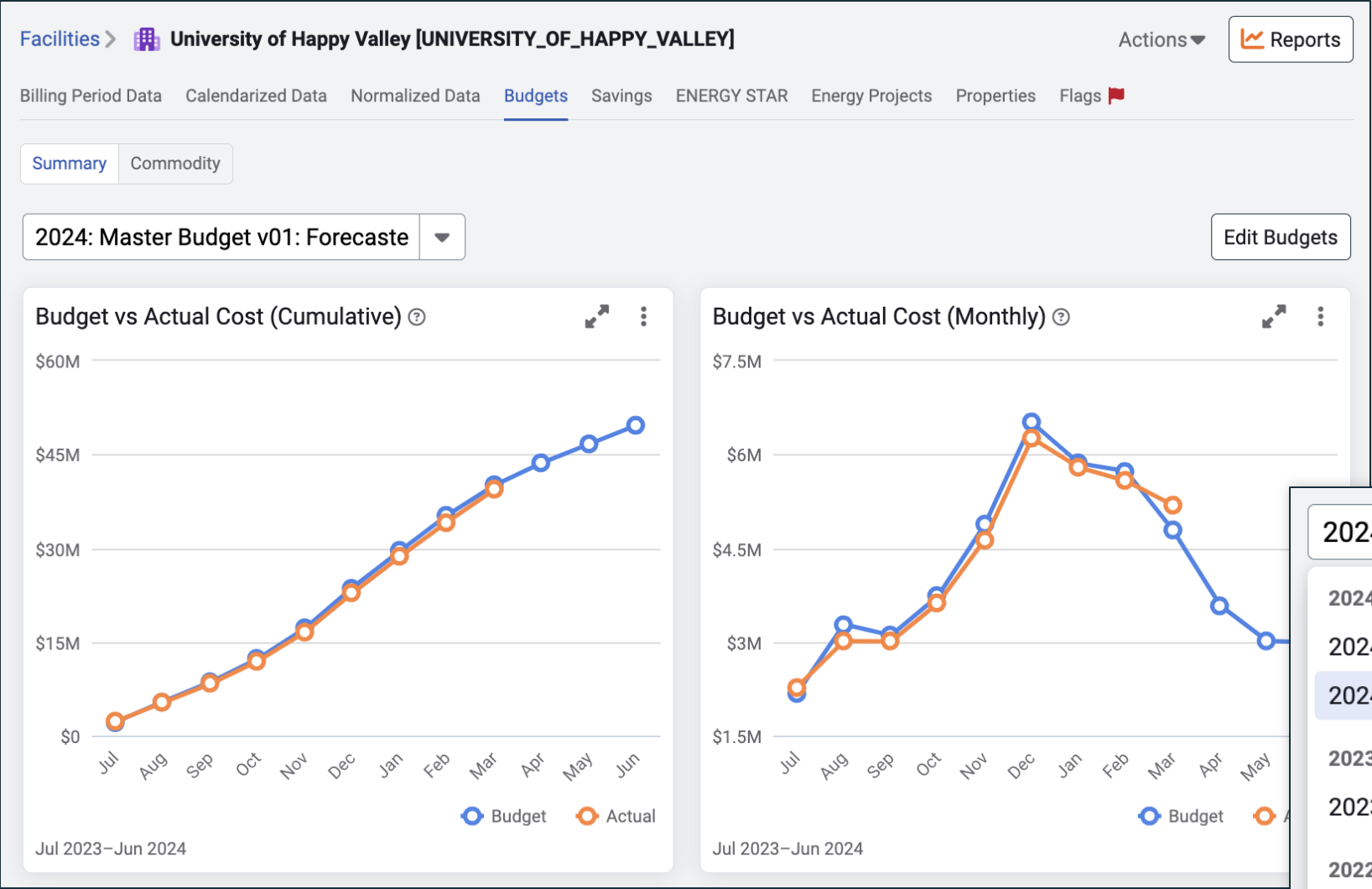
Fiscal Years 2021–2024 (Billing Period Data)

2024 Target

2024 YTD Target

**New Budgets Feature is
Now Available!**

UtilityManagement // Budgeting feature



2024: Master Budget v01: Forecaste ▾

2024: MASTER BUDGET

2024: Master Budget v02: Original Based on Historic Averages

2024: Master Budget v01: Forecasted Unit Cost Changes **Active**

2023: FY 2023

2023: FY 2023 v01: FY 2023 **Active**

2022: FY 2022

2022: FY 2022 v01: FY 2022 **Active**

UtilityManagement // Budgeting feature

Budgets

New Budget

Done

Name	Budget year	Versions	Created by	Created	Total ⓘ
▼ Master Budget	2024	2	Douglas Underhill	05/06/2024	\$53,160,029.65
VERSIONS					
Name			Modified by	Modified	Total
v01.Forecasted Unit Cost Changes Active			David Ulmer	05/07/2024	\$53,160,029.65 Actions
v02.Original Based on Historic Averages					

▼ FY 2023	2023	1	Dave Mos		
VERSIONS					
Name			Modified by	Modified	
v01.FY 2023 Active			Dave Mos		

▼ FY 2022	2022	1	Dave Mos		
VERSIONS					
Name			Modified by	Modified	
v01.FY 2022 Active			Dave Mos		

[Learn more about budgets](#)

v01.Forecasted Unit Cost Changes Electric (kWh)								
Building Code	Building Name	Floor Area Changes	Use Changes	Average Unit Cost Changes	New Monthly Commodity Cost	Other fixed costs/adjustments	Budget Total Cost	
		Enter percentage of change. Leave at 0% if no change.	Enter percentage of change. Leave at 0% if no change.	Enter percentage of change. Leave at 0% if no change.	New commodity cost based on changes made to use, floor area, and unit cost.	Enter additional fixed costs for your budget.	New monthly commodity cost + other fees	
Totals					\$ 2,385,711	\$ -	\$ 2,385,711	
NEU_A086	Abbott Campus Union				\$ 85,721	\$ -	\$ 85,721	
	July	0.0%	0.0%	0.0%	\$ 6,035	\$ -	\$ 6,035	
	August	0.0%	0.0%	0.0%	\$ 6,518	\$ -	\$ 6,518	
	September	0.0%	0.0%	0.0%	\$ 6,774	\$ -	\$ 6,774	
	October	0.0%	0.0%	0.0%	\$ 7,241	\$ -	\$ 7,241	
	November	0.0%	0.0%	0.0%	\$ 6,637	\$ -	\$ 6,637	
	December	0.0%	0.0%	0.0%	\$ 6,366	\$ -	\$ 6,366	
	January	0.0%	0.0%	0.0%	\$ 6,768	\$ -	\$ 6,768	
	February	0.0%	0.0%	0.0%	\$ 7,762	\$ -	\$ 7,762	
	March	0.0%	0.0%	0.0%	\$ 8,407	\$ -	\$ 8,407	
	April	0.0%	0.0%	0.0%	\$ 8,288	\$ -	\$ 8,288	
	May	0.0%	0.0%	0.0%	\$ 7,750	\$ -	\$ 7,750	
	June	0.0%	0.0%	0.0%	\$ 7,175	\$ -	\$ 7,175	
TGE_A028	Academic Greenhouse East				\$ 1,193	\$ -	\$ 1,193	
	July	0.0%	0.0%	0.0%	\$ 67	\$ -	\$ 67	
	August	0.0%	0.0%	0.0%	\$ 68	\$ -	\$ 68	
	September	0.0%	0.0%	0.0%	\$ 61	\$ -	\$ 61	
	October	0.0%	0.0%	0.0%	\$ 79	\$ -	\$ 79	
	November	0.0%	0.0%	0.0%	\$ 106	\$ -	\$ 106	
	December	0.0%	0.0%	0.0%	\$ 146	\$ -	\$ 146	
	January	0.0%	0.0%	0.0%	\$ 157	\$ -	\$ 157	
	February	0.0%	0.0%	0.0%	\$ 148	\$ -	\$ 148	
	March	0.0%	0.0%	0.0%	\$ 131	\$ -	\$ 131	
	April	0.0%	0.0%	0.0%	\$ 94	\$ -	\$ 94	
	May	0.0%	0.0%	0.0%	\$ 67	\$ -	\$ 67	
	June	0.0%	0.0%	0.0%	\$ 68	\$ -	\$ 68	
TGW_A027	Academic Greenhouse West				\$ 1,193	\$ -	\$ 1,193	
	July	0.0%	0.0%	0.0%	\$ 67	\$ -	\$ 67	
	August	0.0%	0.0%	0.0%	\$ 68	\$ -	\$ 68	
	September	0.0%	0.0%	0.0%	\$ 61	\$ -	\$ 61	
	October	0.0%	0.0%	0.0%	\$ 79	\$ -	\$ 79	
	November	0.0%	0.0%	0.0%	\$ 106	\$ -	\$ 106	
	December	0.0%	0.0%	0.0%	\$ 146	\$ -	\$ 146	

UtilityManagement // Budgeting feature

- Leverage the value of the data you're already tracking
 - Month-by-month calendarized use and cost data
 - Building sizes
 - Unit costs
 - Weather sensitivity
- Model multiple budget versions/scenarios
- Allow multiple people to contribute to one holistic budget
- Report on progress
- Auto-create a budget to hit a specific spending target

UtilityManagement // Lots more updates available too

- Longer bill line captions (up to 100 characters)
- Improved error resolution with bill import
- Unit costs on each bill line item
- New bill list columns for better currency reporting
- Updated charts, dashboard widgets, and maps
- Easier dashboard options and tooling
- New reports
- New bill payment services available
- Submit to ENERGY STAR by commodity instead of meter

**Thank you for
your input and
feedback!**

EnergyCAP Help Center // helpcenter.energycap.com

**Stay up-to-date on
the latest features
and updates**

ENERGYCAP | Help Center

Find help by solution



UtilityManagement



CarbonHub



SmartAnalytics



**Utility Company
Platform**

**Connect with fellow
EnergyCAPers**

EnergyCAP constantly innovates and delivers value to you



- **EnergyCAP's ongoing journey of innovation**
- **Going beyond UtilityManagement:**
 - SmartAnalytics
 - CarbonHub
- **A plethora of new EnergyCAP features to learn about!**
- **What's next?**
- **Making the most of your Catalyst experience**

EnergyCAP constantly innovates and delivers value to you

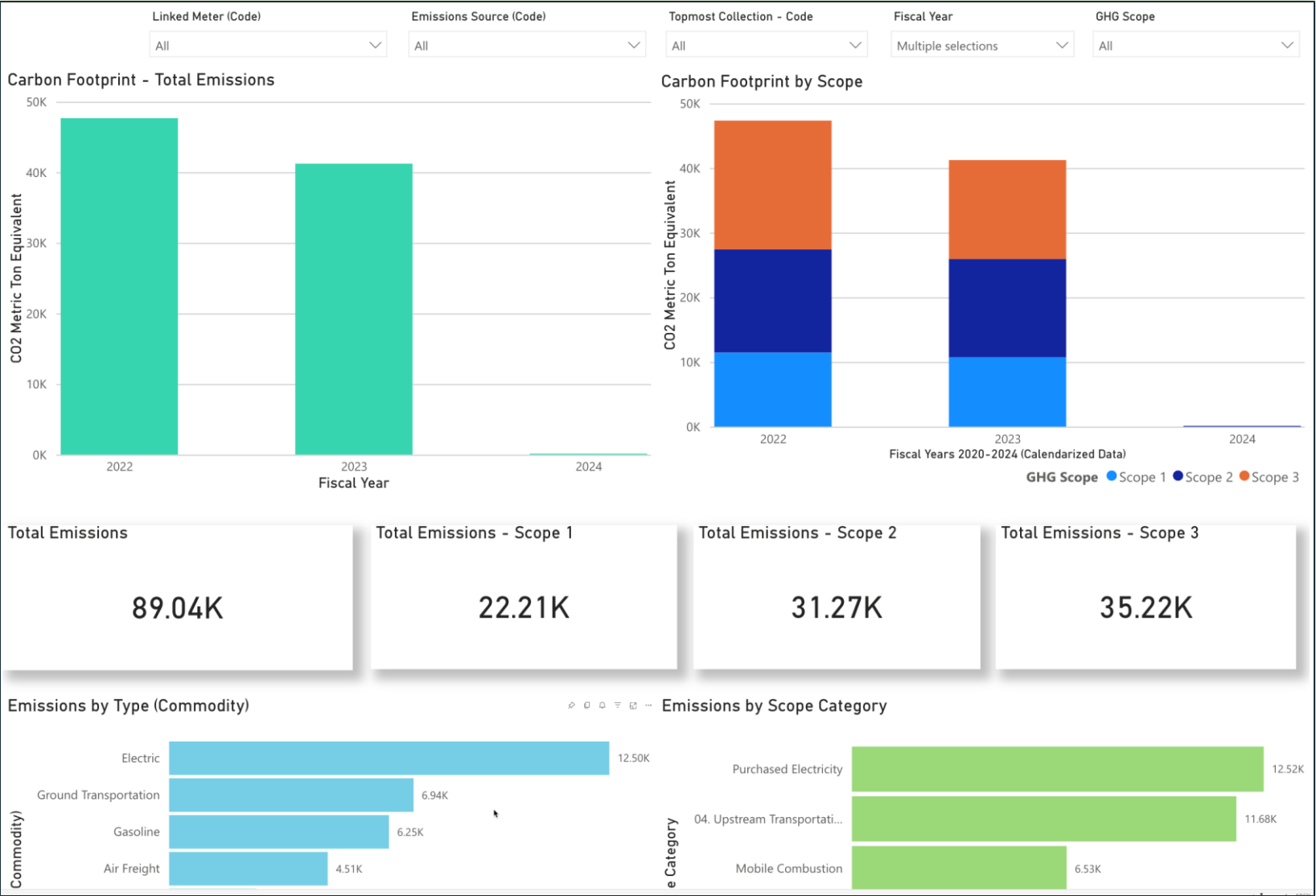


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Cost Categories

- **Combine similar costs together into your own categories**
- Available in charts, dashboards, and reports
- Even more value from each bill line item
- Examples:
 - Supply costs – separate supply charges from all other bill costs
 - Taxes/Fees – separate taxes and other fees for reporting
 - Custom category – track exactly what matters to your organization

CarbonHub data integrated into Report Designer BI



One more big announcement...

Report Builder

Report Builder // Create your own reports

- Start from scratch or use provided templates
- Combine data across your EnergyCAP products
- Add only the columns/data you want to see
 - Add your own Custom Fields
- Group and organize your data
- Easily export reports
- Take advantage of all the other reporting features:
 - Saved reports
 - Shared reports
 - Report distribution



CATALYST '24

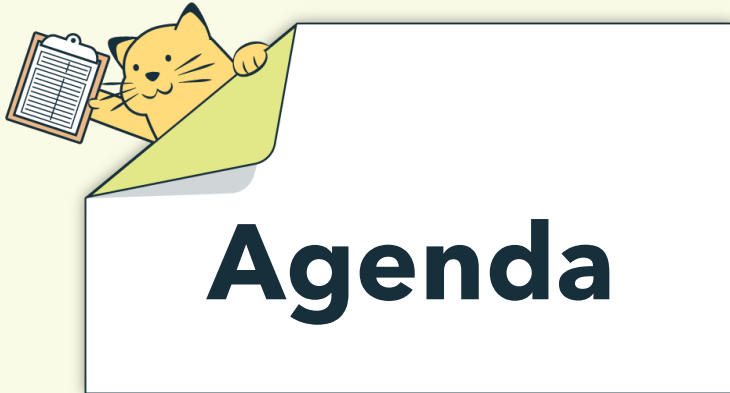
Let's see it in action

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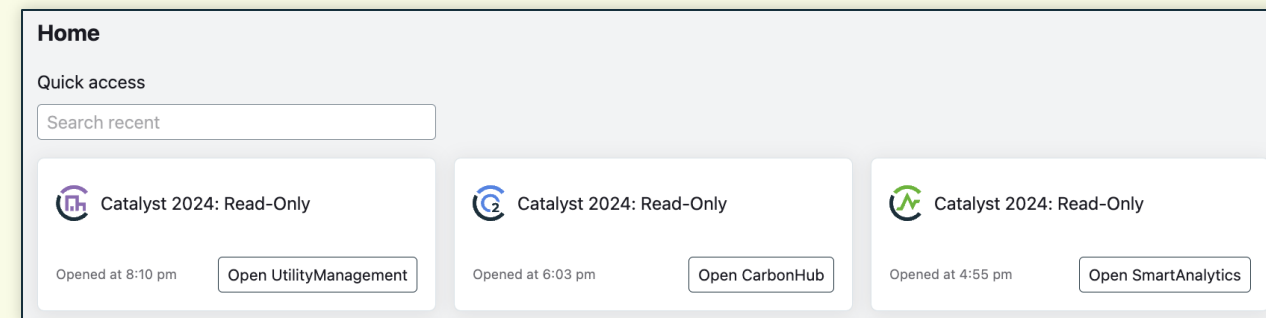
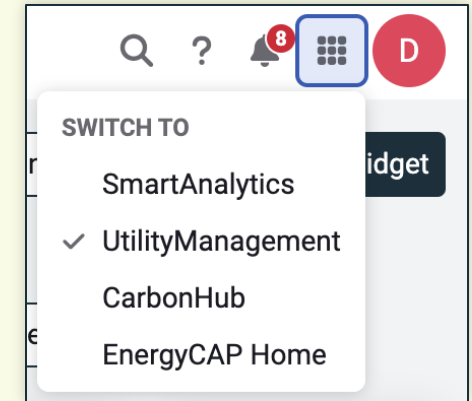
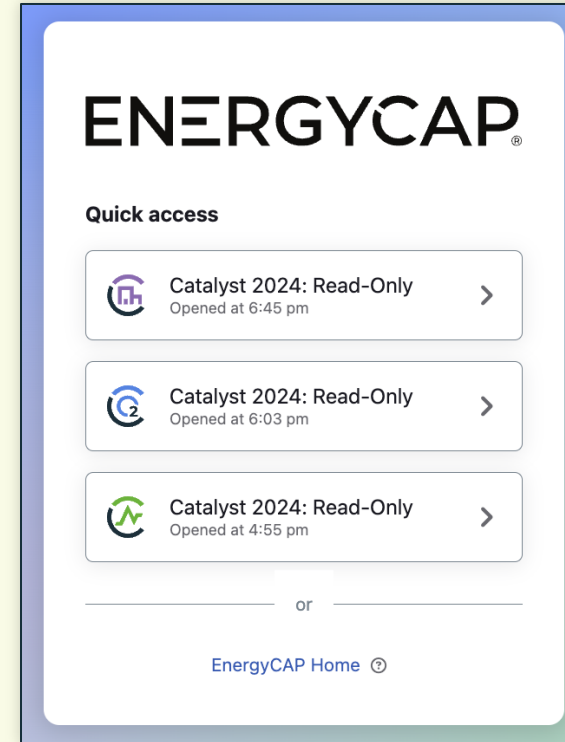


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Experience all three products at Catalyst

Access all products during Catalyst

- Personalized invitation emails sent from EnergyCAP
- Log in via EnergyCAP Home (login.energycap.com)
- **Catalyst 2024: Read-Only**
 - SmartAnalytics, UtilityManagement, and CarbonHub
- **Catalyst 2024: Read-Write**
 - UtilityManagement, and CarbonHub
 - Special folders for each attendee to “play”
- Use the application switcher to navigate between EnergyCAP Home and each product



Be Curious, Ask Questions, and Share with Others

We want this week to be a practical learning experience for you

- Be curious – in and out of sessions
- Try something new!
- Ask questions to presenters and EnergyCAP team members
- Ask questions to other attendees
- Share what you know and what has worked for you
- Don't go home with questions



EnergyCAP Eco Champions // User Community

<https://energycap.com/subscribe-eco-champions>

Sign Up Now



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ECO
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2



Share ideas // Build community // Make the world a greener place

EnergyCAP constantly innovates and delivers value to you



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Jump In!



CATALYST '24



Session survey