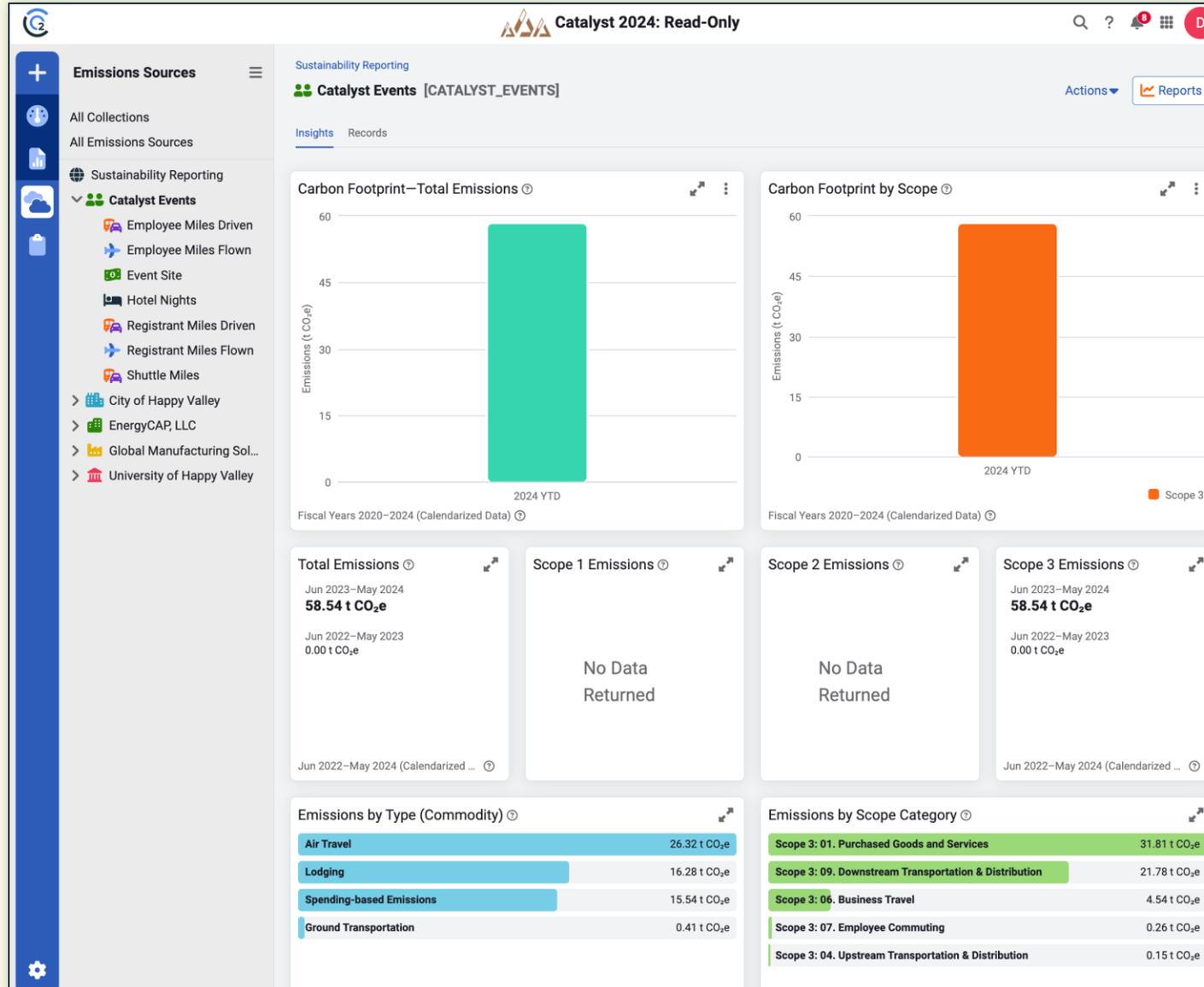




CATALYST '24

Welcome to Catalyst

Understanding the GHG impact of Catalyst (via CarbonHub)



Purchased carbon offsets for this event

New Record
Cancel Save

Emissions source: ENC Purchased Offsets Supplier: Arbor Day Foundation

Start date: 05/01/2024 End date: 06/01/2024

EMISSIONS DETAILS AND CALCULATIONS

Use Cost **Direct/Offset**

Scope category: Scope 3 - Carbon Offsets and Adjustments (Scope 3)

Factor: Carbon Offset

Quantity: 60 Unit: t CO₂e

Cost: 2700.00 Currency: USD (\$)

NOTES

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

2024.05.10 - Arbor Day Offsets.pdf × [Browse](#)

Total emissions calculated after saving.

Catalyst 2024: Read-Only
Search ? Notifications Grid Profile

Emissions Sources

- All Collections
- All Emissions Sources
- Sustainability Reporting
- Catalyst Events**
 - Employee Miles Driven
 - Employee Miles Flown
 - ENC Purchased Offsets
 - Event Site
 - Hotel Nights
 - Registrant Miles Driven
 - Registrant Miles Flown
 - Shuttle Miles
- City of Happy Valley
- EnergyCAP, LLC
- Global Manufacturing Sol...
- University of Happy Valley

Sustainability Reporting

Catalyst Events [CATALYST_EVENTS]

Actions Reports

Insights

Records

Carbon Footprint—Total Emissions

Fiscal Years 2020–2024 (Calendarized Data)

Carbon Footprint by Scope

Fiscal Years 2020–2024 (Calendarized Data)

Total Emissions

Jun 2023–May 2024: **-1.46 t CO₂e**

Jun 2022–May 2023: 0.00 t CO₂e

Fiscal Years 2022–2024 (Calendarized Data)

Scope 1 Emissions

No Data Returned

Fiscal Years 2022–2024 (Calendarized Data)

Scope 2 Emissions

No Data Returned

Fiscal Years 2022–2024 (Calendarized Data)

Scope 3 Emissions

Jun 2023–May 2024: **-1.46 t CO₂e**

Jun 2022–May 2023: 0.00 t CO₂e

Fiscal Years 2022–2024 (Calendarized Data)

Emissions by Type (Commodity)

Air Travel	26.32 t CO ₂ e
Lodging	16.28 t CO ₂ e
Spending-based Emissions	15.54 t CO ₂ e
Ground Transportation	0.41 t CO ₂ e
Carbon Offset	-60.00 t CO ₂ e

Emissions by Scope Category

Scope 3: 01. Purchased Goods and Services	31.81 t CO ₂ e
Scope 3: 09. Downstream Transportation & Distribution	21.78 t CO ₂ e
Scope 3: 06. Business Travel	4.54 t CO ₂ e
Scope 3: 07. Employee Commuting	0.26 t CO ₂ e
Scope 3: 04. Upstream Transportation & Distribution	0.15 t CO ₂ e
Scope 3: Carbon Offsets and Adjustments (Scope 3)	-60.00 t CO ₂ e

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

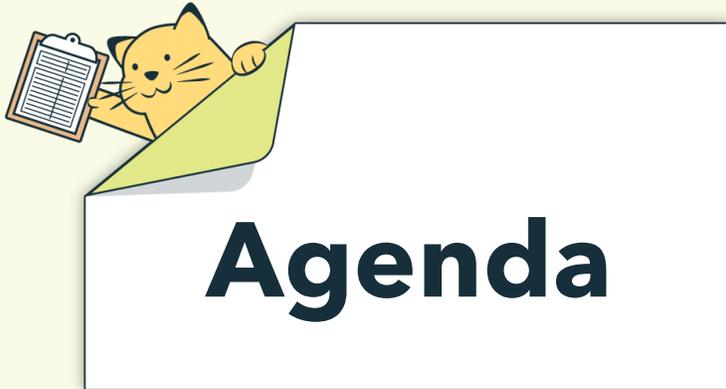
2-5 hours on planes

5-10 hours on planes

Others?

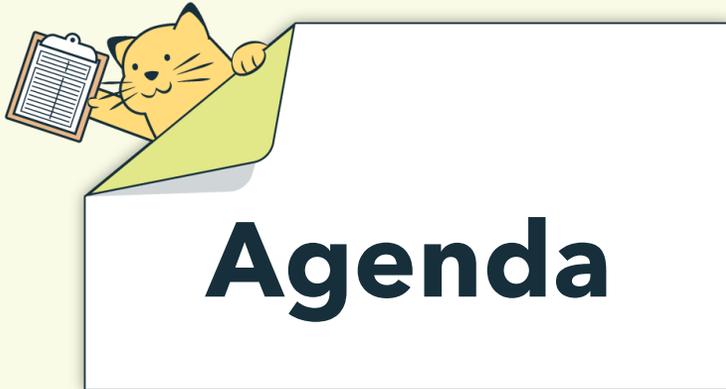
We're glad you're here - let us know how we can help!

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**

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- **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



Pennsylvania



London, UK



California



Texas

**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

CARBONHUB
An EnergyCAP Solution

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

ENERGYCAP

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

 **Wattics**
An EnergyCAP Solution

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

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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Energy/Facilities

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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Persona:

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Portfolio-level energy and sustainability reporting

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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/Providence



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

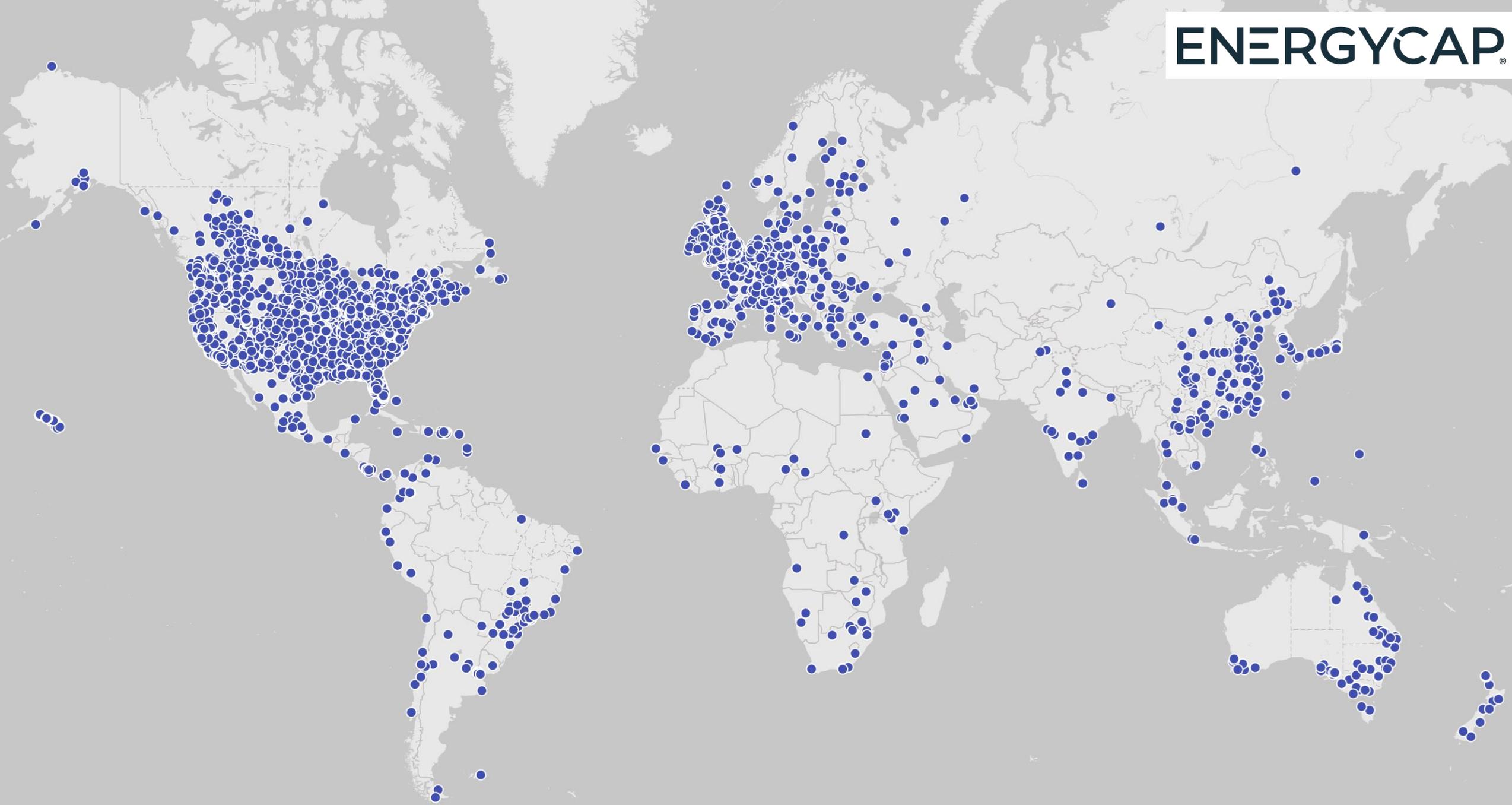


Transportation



Property management/Real estate





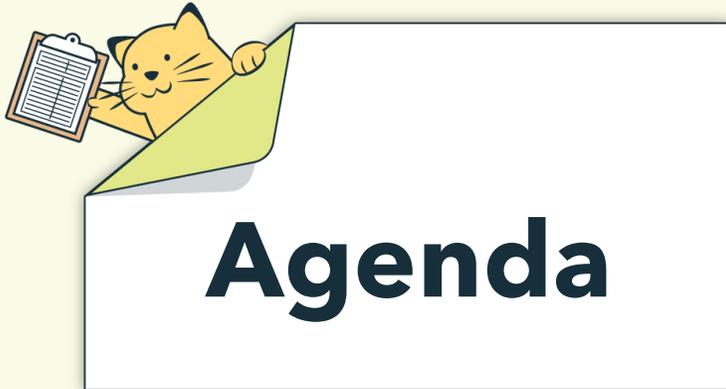
Cities with one or more facilities served by EnergyCAP's Energy & Sustainability ERP

EnergyCAP constantly innovates and delivers value to you



- **EnergyCAP's ongoing journey of innovation**
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 - SmartAnalytics
 - CarbonHub
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EnergyCAP constantly innovates and delivers value to you



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 - **SmartAnalytics**
 - **CarbonHub**
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- Making the most of your Catalyst experience

SmartAnalytics // Real-time energy and sustainability analytics



Capture

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

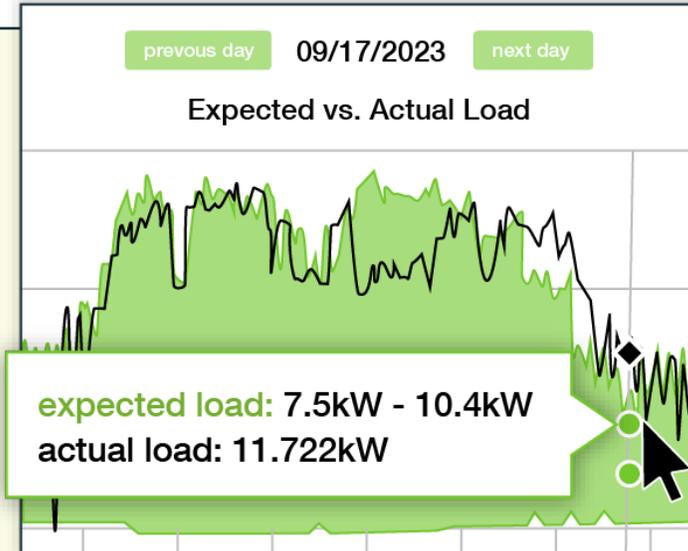
Hierarchy

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

Groups

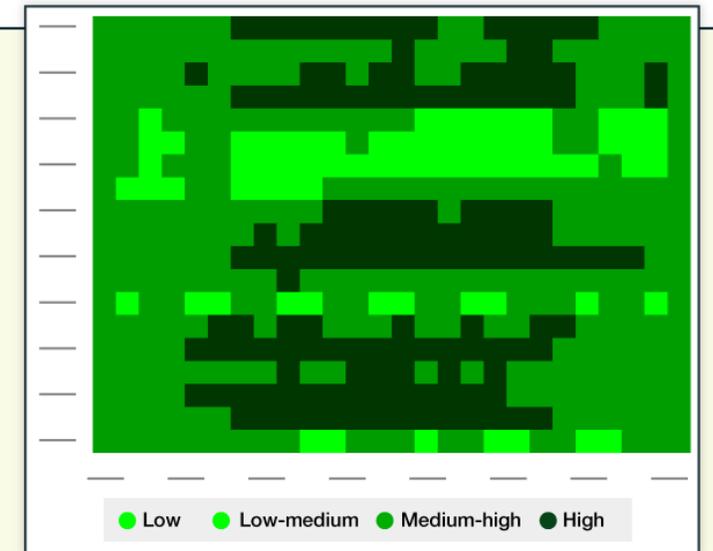
Monitor

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

 <p>5-step guide to install and connect your Wattwatchers device to Wattics energy management software <small>THIRD-PARTY INTEGRATIONS</small></p>	 <p>Accuenergy AcuLink 710 via HTTP <small>GATEWAYS</small></p>	 <p>Accuenergy AcuREV20XX Meters via HTTP <small>METERS</small></p>	 <p>Connect your Elvaco CMe3100 gateway to Wattics energy and air analytics software <small>GATEWAYS</small></p>	 <p>Connect your EpiSensor gateway and sensors to Wattics <small>THIRD-PARTY INTEGRATIONS</small></p>	 <p>Connect your Schneider Com'X Gateway to Wattics via API <small>GATEWAYS</small></p>	 <p>Plateforme ENGIE <small>DATA SYSTEMS</small></p>	 <p>Questionnaire: Determining your metering needs and project environment <small>METERS</small></p>	 <p>Rainforest Eagle Gateway via HTTPS <small>GATEWAYS</small></p>	 <p>Use your Accuenergy AcuRev 2020 or AcuVim II meter as a gateway for pulse capable meters <small>METERS</small></p>
 <p>Accuenergy AcuVIM-II via HTTP <small>METERS</small></p>	 <p>Analytics REST API <small>API</small></p>	 <p>Aquametro CONTOIL VZO 4/8 via Octopus Gateway <small>METERS</small></p>	 <p>Carlo Gavazzi EM21 via Octopus Gateway <small>METERS</small></p>	 <p>Carlo Gavazzi VMU-C EM via FTP <small>GATEWAYS</small></p>	 <p>Connect your building devices to Wattics via MQTT <small>THIRD-PARTY INTEGRATIONS</small></p>	 <p>Landis Gyr ULTRAHEAT T550 (UC50) via Octopus Gateway <small>METERS</small></p>	 <p>Northern Design Rail 350 Meters via Octopus Gateway <small>METERS</small></p>	 <p>Omron KM-NE-FLK via Octopus Gateway <small>METERS</small></p>	 <p>SolarEdge API <small>THIRD-PARTY INTEGRATIONS</small></p>
 <p>Connect your Shelly 3EM 3-phase meter to the Wattics energy management dashboard <small>METERS</small></p>	 <p>Eaton PKM 2000 Meters via Octopus Gateway <small>METERS</small></p>	 <p>eGauge via HTTP <small>METERS</small></p>	 <p>How to connect your WattSense box to Wattics cloud based energy analytics software <small>GATEWAYS</small></p>	 <p>Integrate your Kaiterra Air Quality sensors with Wattics energy management [How to guide] <small>SENSORS</small></p>	 <p>Integrate your Smappee device with Wattics Energy Management Software <small>THIRD-PARTY INTEGRATIONS</small></p>	 <p>REST API - Smart Meter Energy Data API <small>API</small></p>	 <p>Schneider PowerLogic ECX300 Gateway via FTP <small>GATEWAYS</small></p>	 <p>Schneider PowerLogic PM8000 meter via Obvius AcquiSuite EMB A8B10 Gateway <small>METERS</small></p>	 <p>Upload your data in CSV with data uploader in Wattics dashboard <small>FILES</small></p>
 <p>EIG Nexus 1500 Meter via Obvius AcquiSuite EMB A8B10 Gateway <small>METERS</small></p>	 <p>Get your energy data to Wattics via FTP <small>FILES</small></p>	 <p>GreenButton XML <small>FILES</small></p>	 <p>Iskraemeco Mx382 GPRS via HES <small>METERS</small></p>	 <p>Itron Gas Volume Converter CORUS (PTZ) via Octopus Gateway <small>METERS</small></p>	 <p>Klik 22 Electrical Meters via Octopus Gateway <small>METERS</small></p>	 <p>Schneider TAC Xenta 411 via Octopus Gateway <small>GATEWAYS</small></p>	 <p>Send your data to Wattics effortlessly with email parser <small>FILES</small></p>	 <p>Socomec Diris G via FTP <small>GATEWAYS</small></p>	 <p>Step-by-step-guide: How to connect your Wattics energy management dashboard to Arc green building scoring platform <small>THIRD-PARTY INTEGRATIONS</small></p>

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

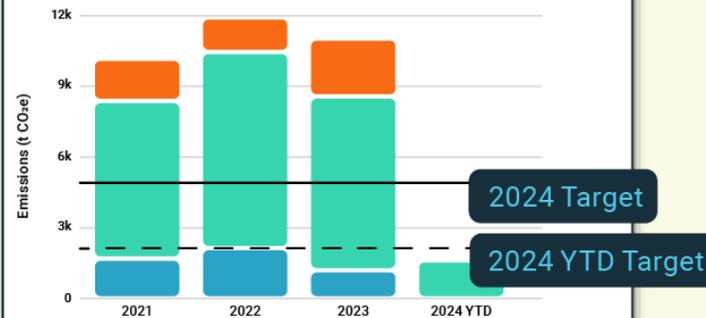
Jan 2023–Dec 2023
108,510 t CO₂e
Jan 2022–Dec 2022
70,215 t CO₂e

↓ 6.3%

Target

Set targets and track performance to your decarbonization goals.

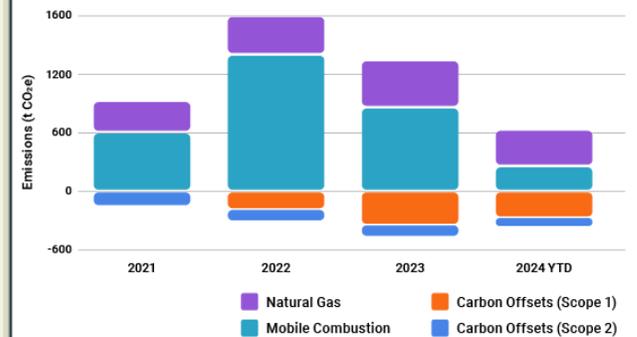
Total Emissions - Last 4 Fiscal Years



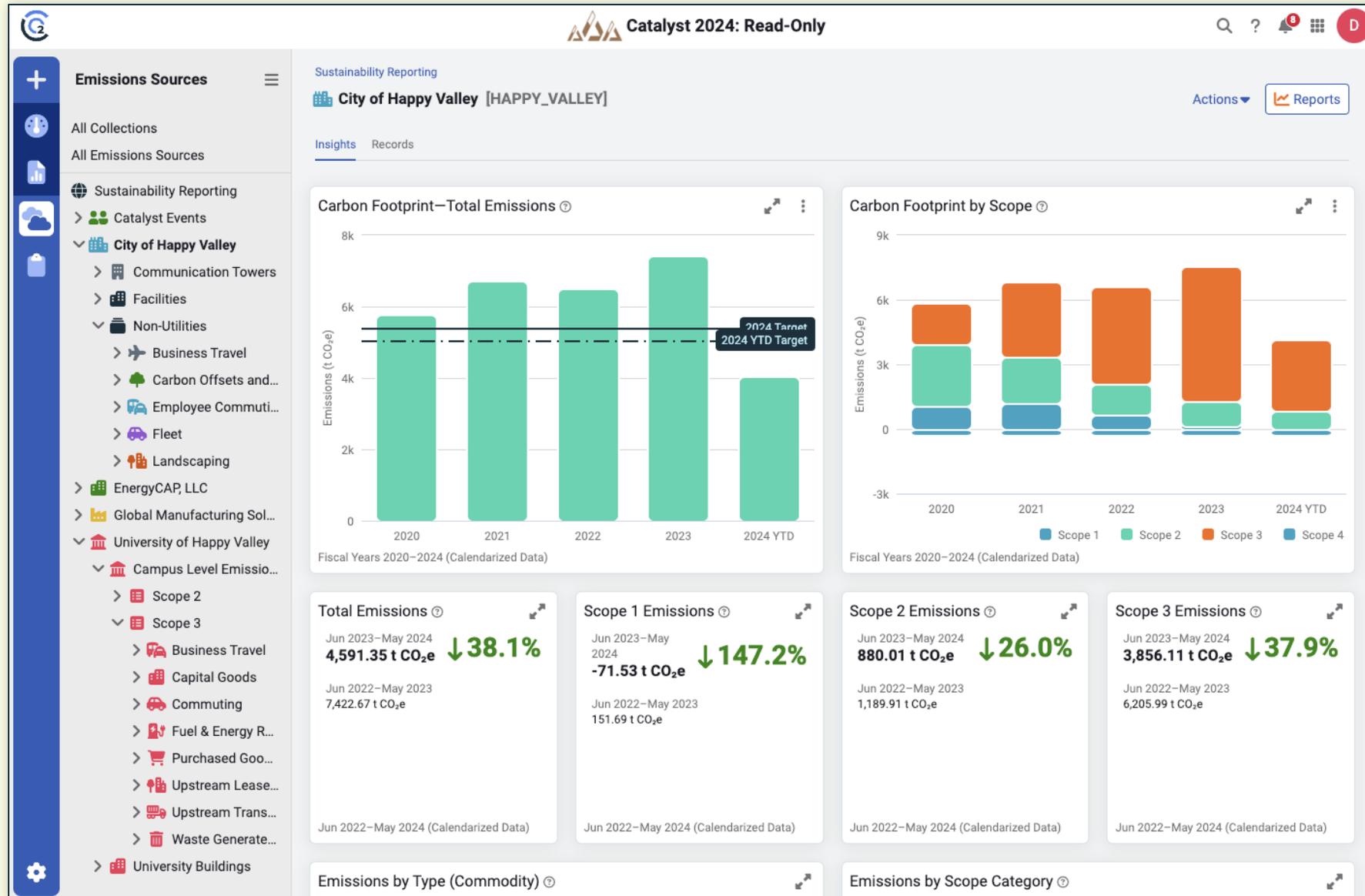
Report

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!

Happy Valley
 1400 N Lincoln Ave - ELE
 1635011000
 1400 N Lincoln Ave, Happy Valley, PA 12345, United States

PA Gas Electric Co.
 PGE
 United States

Batch: 20230126_BILLCAPTURE

Account History	Timeline	Note
11/01/2022-12/02/2022		\$-8,194.39
10/03/2022-11/01/2022		\$6,643.59
09/01/2022-10/03/2022		\$7,495.63
08/03/2022-09/01/2022		\$7,604.47
07/05/2022-08/03/2022		\$7,196.44

Start	End	Days	Amount due
10/03/2022	11/01/2022	29	\$6,643.59

Billing period	Due date	Statement date	Control code
October 2022	11/28/2022	11/01/2022	sample

Charge Description	Quantity	Unit	Amount
Basic Charge			\$ 45.00
System Usage Charge	61500 kWh		\$ 617.46
Off-Peak Usage	18000 kWh		\$ 598.32
On-Peak Usage	43500 kWh		\$ 2098.44
Generation Demand Charge	163 kW		\$ 762.84
Off-Peak Demand	150 kW		\$ 0.00
On-Peak Demand	163 kW		\$ 239.61
Reactive Demand Charge	0 kVAR		\$ 0.00
Reactive Demand Actual	62 kVAR		
Transmission Charge	163 kW		\$ 288.51
Distribution Charge	30 kW		\$ 142.50
Distribution Charge	178 kW		\$ 827.70
105 Regulatory Adjustme...	61500 kWh		\$ -1.85
109 Energy Efficiency Fun...	61500 kWh		\$ 285.36
110 Energy Efficiency Cu...	61500 kWh		\$ 3.69
112 Cust Engagement Tr...	61500 kWh		\$ 3.69
118 Bill Adjustment Cost ...	61500 kWh		\$ 14.15
123 Decoupling Adjustm...	61500 kWh		\$ 129.77
Total Cost			\$ 6643.59

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.

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

EMISSIONS DETAILS AND CALCULATIONS

Scope category: Scope 2 - Purchased Electricity

Factor: RFC East

Quantity: 61500 kWh
 Cost: 6643.59 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:

[Create an emission source](#)

Start date: End date:

EMISSIONS DETAILS AND CALCULATIONS

Use Cost Direct/Offset

Scope category:

[Learn more about scope categories](#)

Factor:

[Factor details](#)

Quantity: Unit:

Cost: Currency:

NOTES

Add notes here...

Select file... [Browse](#)

83750382 [Edit](#) [Close](#)

Emissions source:

Start date: End date:

Scope category:

Resource:

Factor:

Category: Source:

Quantity:

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

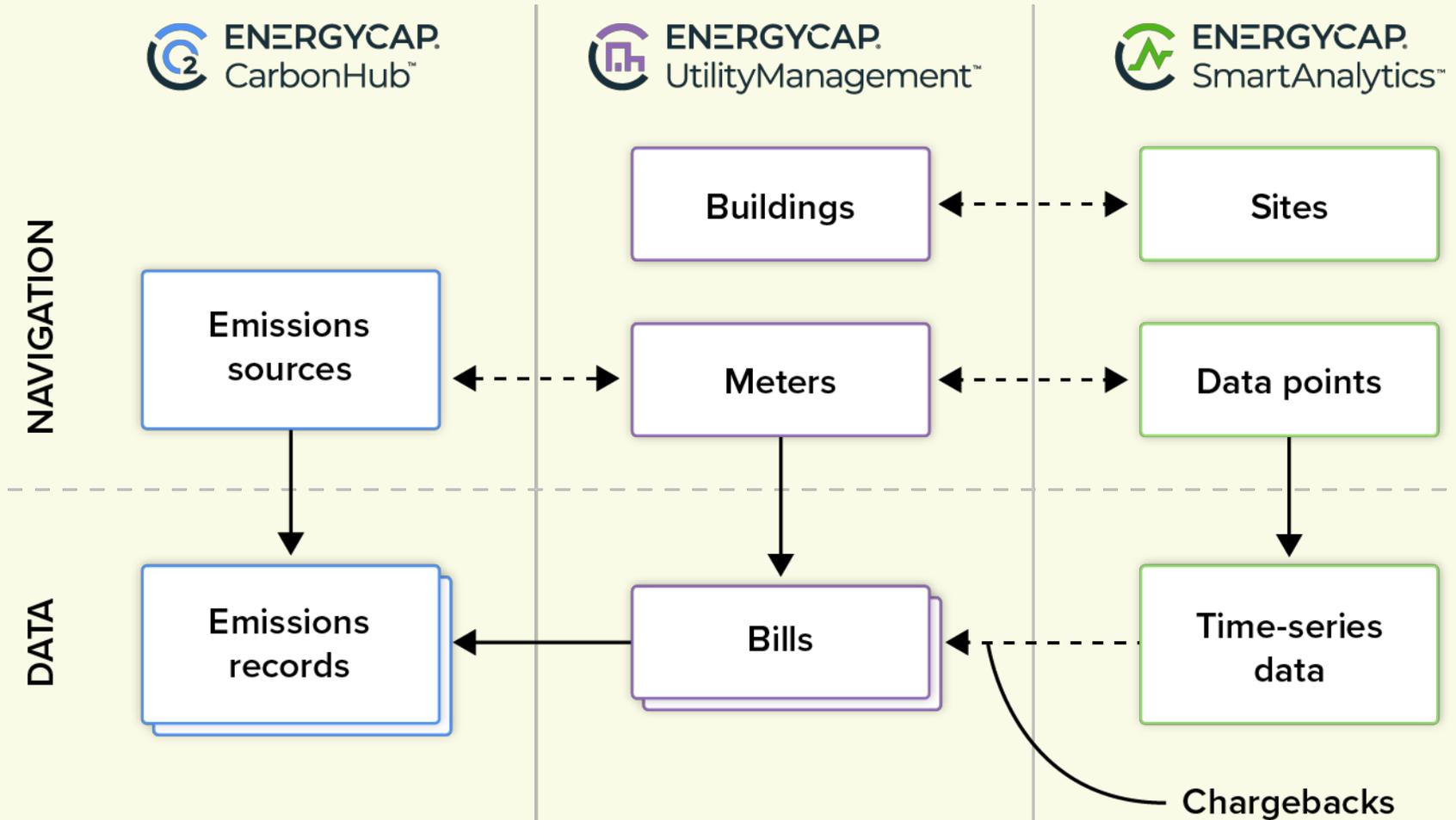
CarbonHub // Learn more during Catalyst

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**

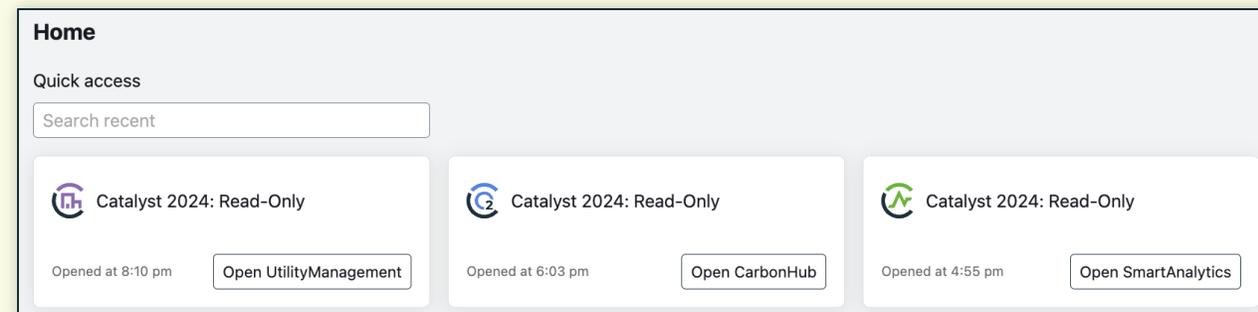
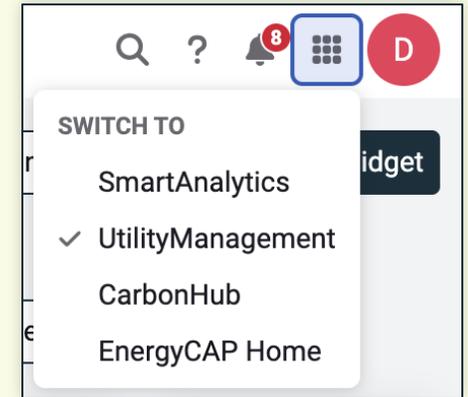
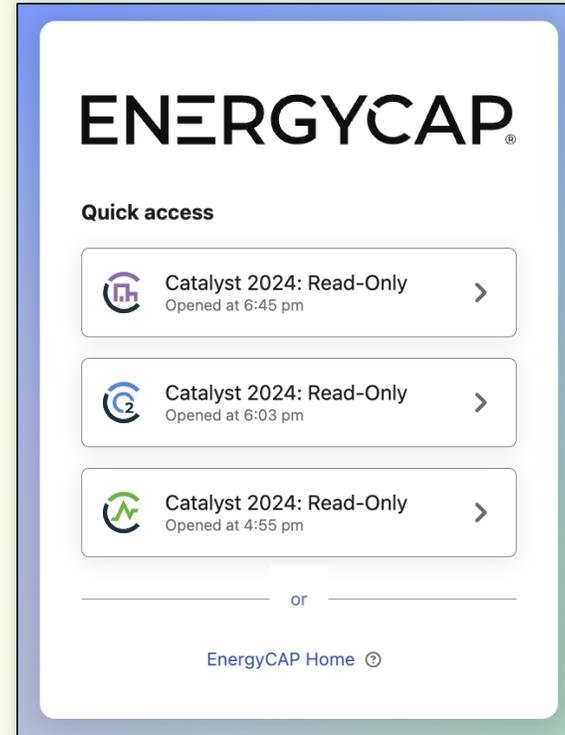
EnergyCAP's Energy and Sustainability ERP // Even more value together



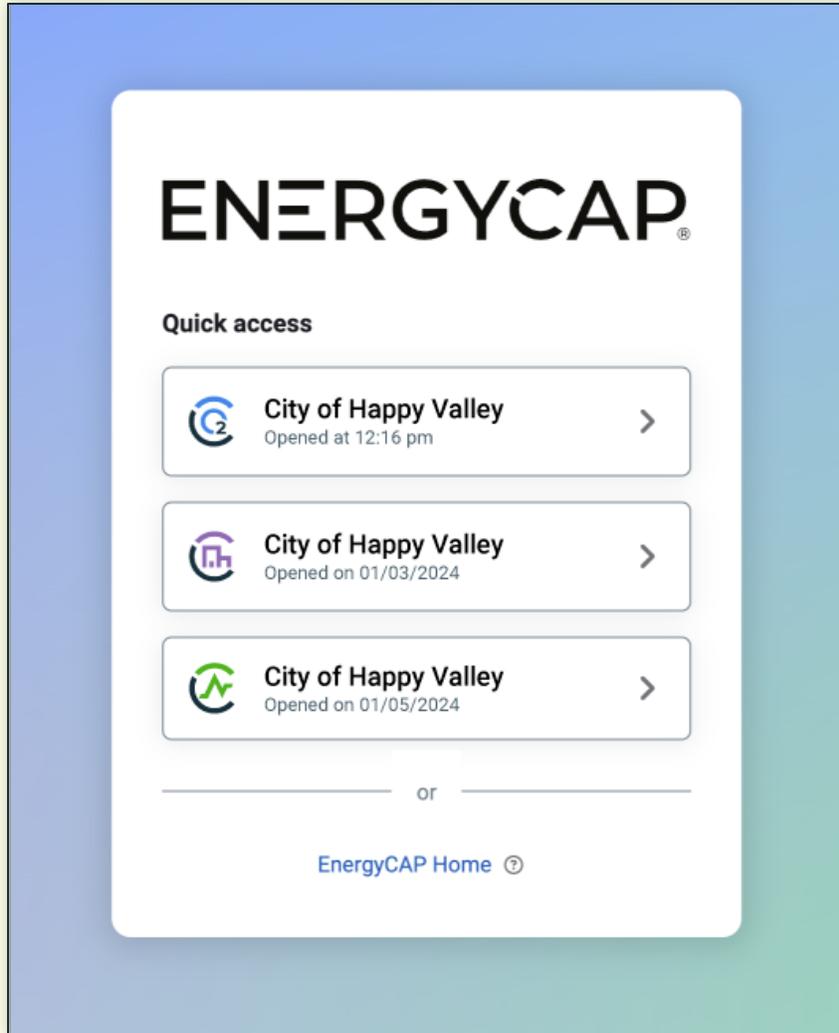
Try it for yourself at Catalyst

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

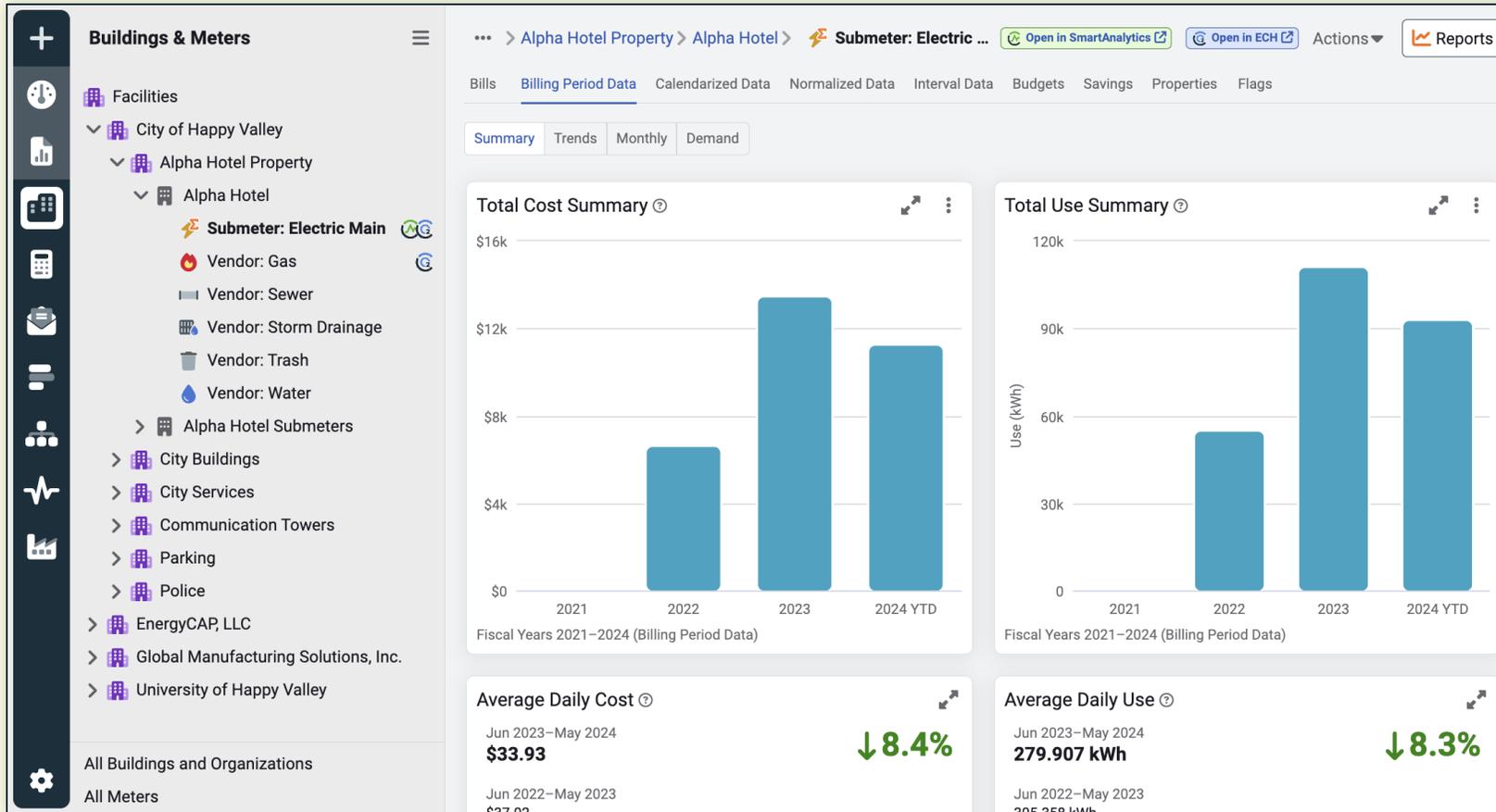


Combined login for all your EnergyCAP products

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

Auto-create authorized users

Connect your data and easily link between products



SWITCH TO

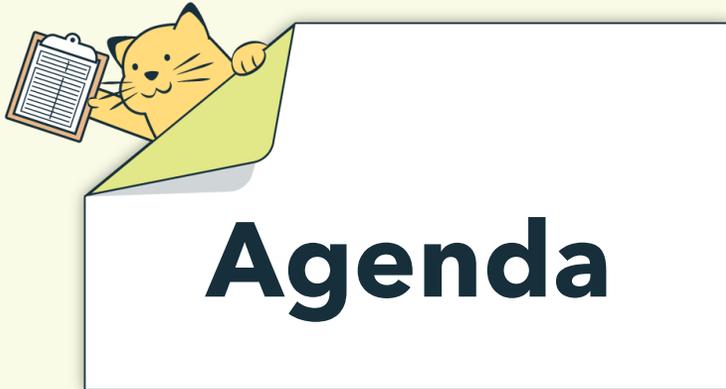
- SmartAnalytics
- UtilityManagement
- ✓ CarbonHub
- EnergyCAP Home

Open in ECH

Open in EUM

Open in SmartAnalytics

EnergyCAP constantly innovates and delivers value to you



- **EnergyCAP's ongoing journey of innovation**
- **Going beyond UtilityManagement:**
 - **SmartAnalytics**
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- A plethora of new EnergyCAP features to learn about!
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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!**



ENERGYCAP[®]

SmartAnalytics[™]

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 * 

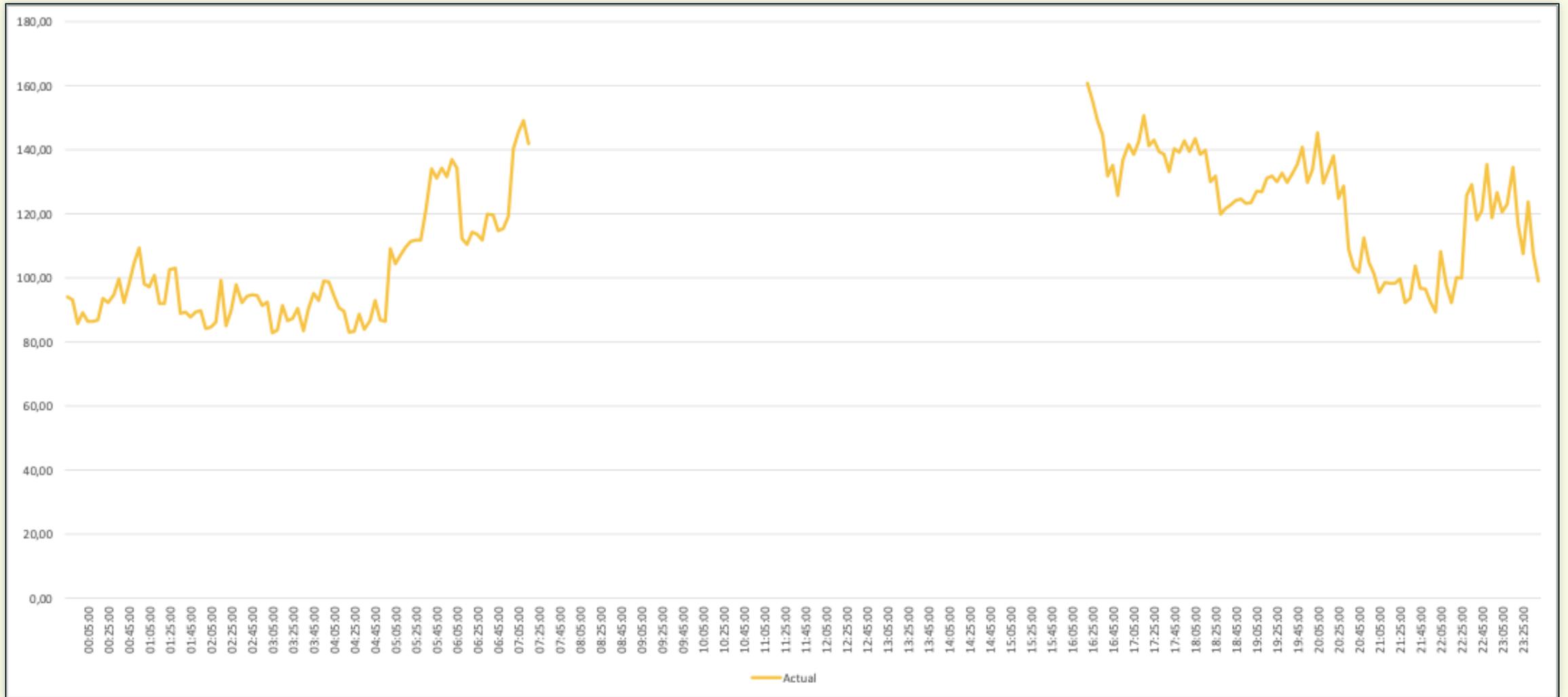
Icon Color 

Supply Pressure

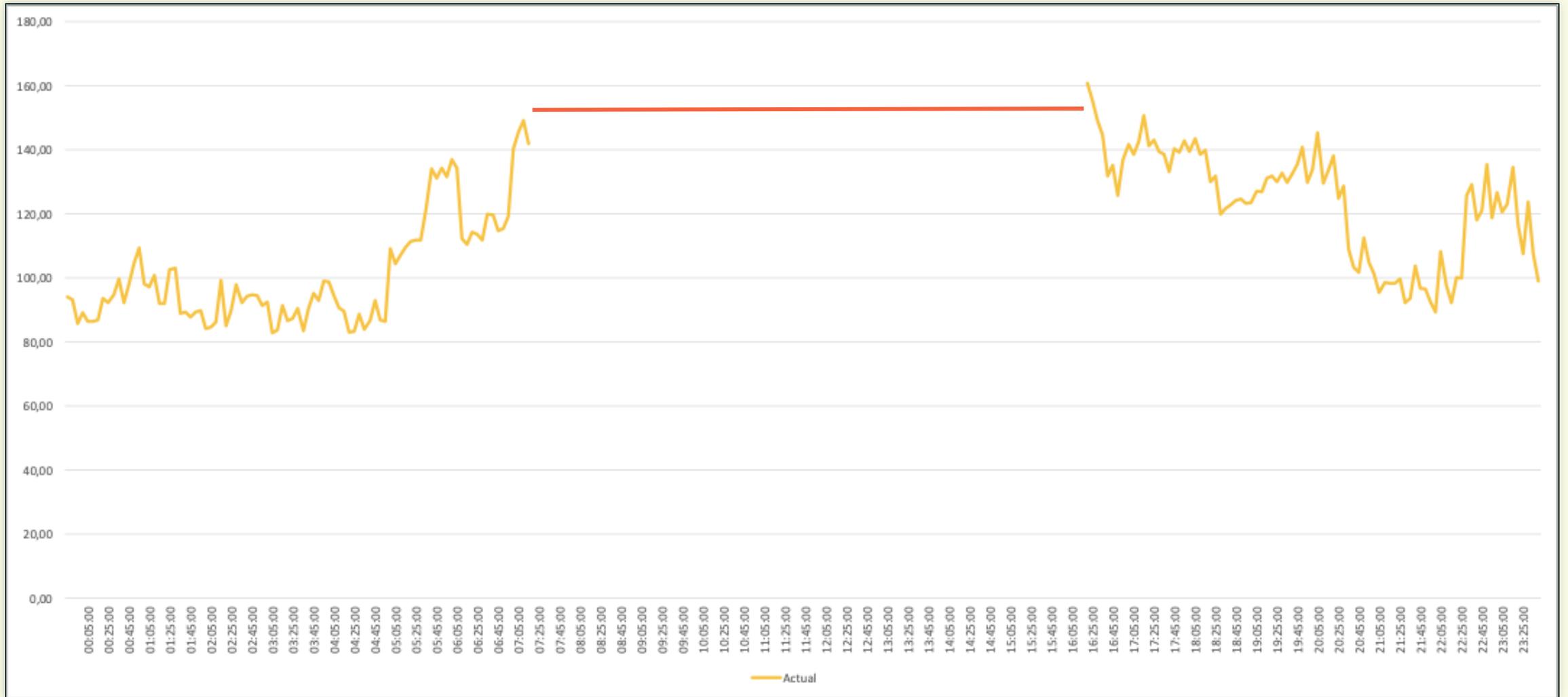
Parameter display name * Supply Pressure: Union Buildin

Parameter ID * Add text

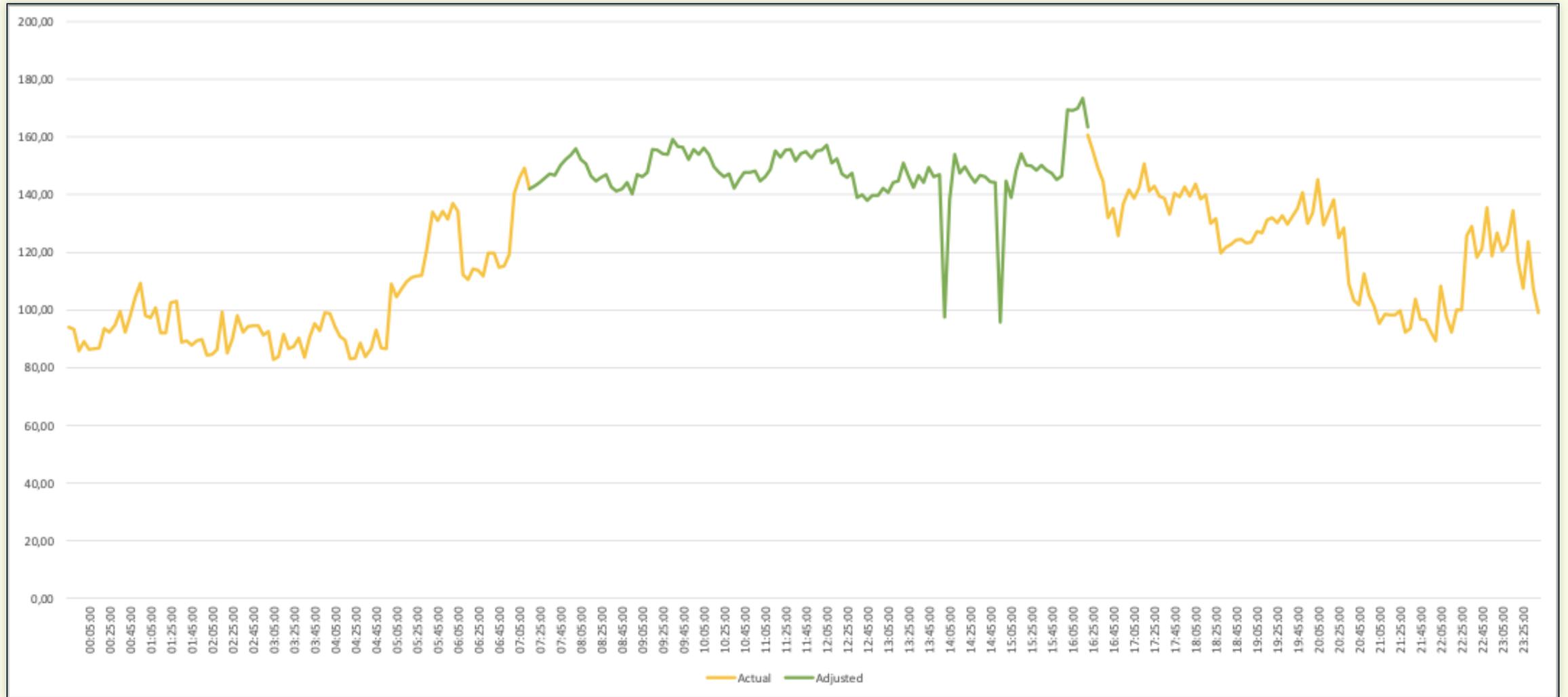
SmartAnalytics // Data Doctor: Backfill missing data based on load shapes



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



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

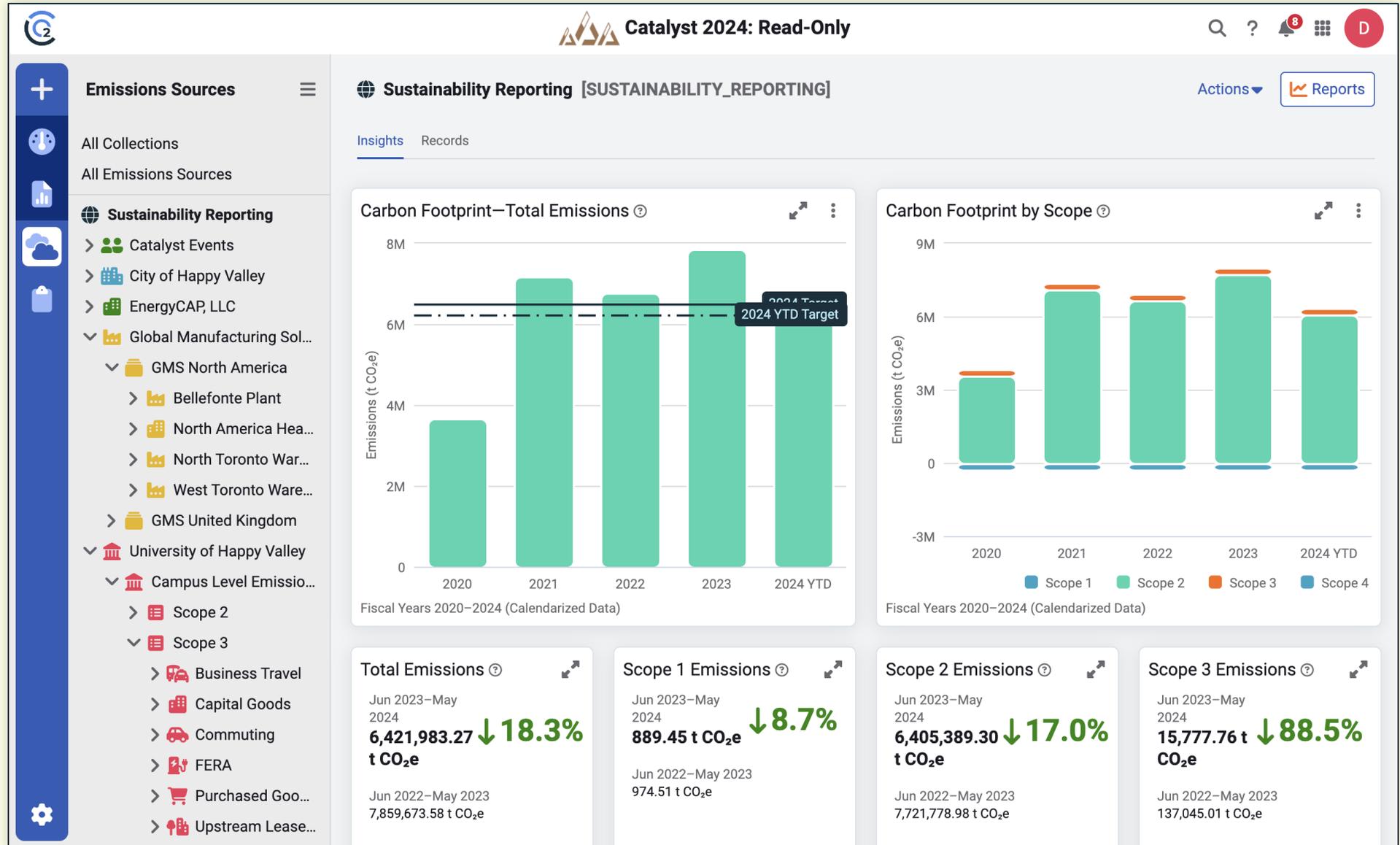




ENERGYCAP[®]

CarbonHub[®]

CarbonHub // Now available as a stand-alone product



CarbonHub // Dedicated GHG dashboard widgets

Add Widget Cancel

Search by name or keyword

Object: All Objects ▼

Display type: All Display Types ▼

Data Type: 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

ENERGYCAP · ©EnergyCAP, LLC

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

New Record

[Cancel](#) [Save](#)

Emissions source: Supplier:

[Create an emission source](#)

Start date: End date:

EMISSIONS DETAILS AND CALCULATIONS

Use Cost Direct/Offset

Scope category:

[Learn more about scope categories](#)

Factor:

[Factor details](#)

Quantity: Unit:

Cost: Currency:

NOTES

[Browse](#)

Import Multiple Records

[Cancel](#) [Import](#)

Use a Template Use a Format

Need help choosing? [?](#)

- To create new records, [download a template](#)
- Upload completed template to import the records.

[Browse](#)

[Learn more about using this spreadsheet](#)

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

New Record Import Format

[Cancel](#) [Save](#)

Name:

Date format:

Header rows to skip:

Notes:

Create supplier

Record information

Emissions Source Code:

Start Date:

End Date:

Supplier:

Notes:

Emissions calculation details (at least one is required)

Use: [Search](#)

Cost: [Search](#)

Direct/Offset: [Search](#)

Record Imports

[Manage Import Formats](#) [Import Records](#)

Imported: - Imported by: Import method: Status: [Reset](#)

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

1-11 of 11 record imports

Imported method: Template 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

Export Upload

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_142410294.zip	05/03/2024 4:13 pm	Dave Mosemann	Successful	CityOfHappyValley_20240503_142410294

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 Exports

Uploads Statistics Transactions Log

File name: Upload date: Uploaded by: Category:

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 Upload

Uploads Statistics Transactions 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

1-3 of 3 transaction types

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



ENERGYCAP[®]

UtilityManagement[™]

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	End	Days	Amount due
02/07/2024	03/07/2024	29	£948.91
Billing period	Due date	Statement date	Control code
February 2024	03/26/2024	03/12/2024	sample
Invoice number	828899620		

Total Cost ⓘ USD \$1,214.14 ⇄ GBP £948.91

London Headquarters-NG01
603572939-NG01

Actions ▾

- Daily Use (Calendarized)
779.887 kWh
- Daily Cost (Calendarized)
\$48.79
- Unit Cost (Calendarized)
\$0.063/kWh

Gas Charges	19324.57 kWh	£0.034200 / kWh	£	660.90
Use				
Standing Charge			£	0.00
Charge				
Climate Change Levy	19324.57 kWh	£0.006720 / kWh	£	129.86
Info_Use				
VAT			£	158.15
Tax				
Meter Subtotal	19324.57 kWh	£0.049104 / kWh	£	948.91

Account Bill Lines

Current Charges (ECBC)	£	948.91
Info_Cost		
Amount Due (ECBC)	£	948.91
Total Pay Amount		
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 Edit...

Description

REPORTING AND ROLLUPS

Category [?] Rollup unit [?]

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

 Electric

 Lighting

 Solar PV

 Wind

 Renewable Electricity

Water Use

 Water

 Water and Sewer

 Irrigation

 Well Water

 Reclaimed Water

 Reclaimed Irrigation

UtilityManagement // Commodity Categories!

Edit Category

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:

Category rollup unit: ▼

Electricity ▼

- Electricity
- ⚡ Electric
- 💡 Lighting
- ☀️ Solar PV
- Sewer
- 🚰 Sewer
- 🚰 Storm Drainage
- 🚰 Chilled Water
- 🌱 Compost



**New Budgets Feature is
Now Available!**

UtilityManagement // Budgeting feature

Facilities > University of Happy Valley [UNIVERSITY_OF_HAPPY_VALLEY] Actions ▾ Reports

Billing Period Data Calendarized Data Normalized Data **Budgets** Savings ENERGY STAR Energy Projects Properties Flags 🚩

Summary Commodity

2024: Master Budget v01: Forecaste Edit Budgets

Budget vs Actual Cost (Cumulative) ☺

Month	Budget	Actual
Jul	\$5M	\$5M
Aug	\$10M	\$8M
Sep	\$15M	\$12M
Oct	\$20M	\$18M
Nov	\$25M	\$22M
Dec	\$30M	\$28M
Jan	\$35M	\$32M
Feb	\$40M	\$38M
Mar	\$45M	\$42M
Apr	\$50M	\$48M
May	\$55M	\$52M
Jun	\$60M	\$58M

Budget vs Actual Cost (Monthly) ☺

Month	Budget	Actual
Jul	\$2.5M	\$2.2M
Aug	\$3.5M	\$3.0M
Sep	\$3.2M	\$3.0M
Oct	\$4.0M	\$3.8M
Nov	\$5.0M	\$4.5M
Dec	\$6.5M	\$6.2M
Jan	\$6.0M	\$5.8M
Feb	\$5.8M	\$5.5M
Mar	\$5.0M	\$4.8M
Apr	\$4.0M	\$3.8M
May	\$3.0M	\$2.8M

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	David Ulmer	05/07/2024	\$53,160,029.65

FY 2023	2023	1	Dave Mos
---------	------	---	----------

VERSIONS

v01.FY 2023	Active
-------------	--------

FY 2022	2022	1	Dave Mos
---------	------	---	----------

VERSIONS

v01.FY 2022	Active
-------------	--------

[Learn more about budgets](#)

v01.Forecasted Unit Cost Changes Electric (kWh)		Floor Area Changes	Use Changes	Average Unit Cost Changes	New Monthly Commodity Cost	Other fixed costs/adjustments	Budget Total Cost
Building Code	Building Name	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

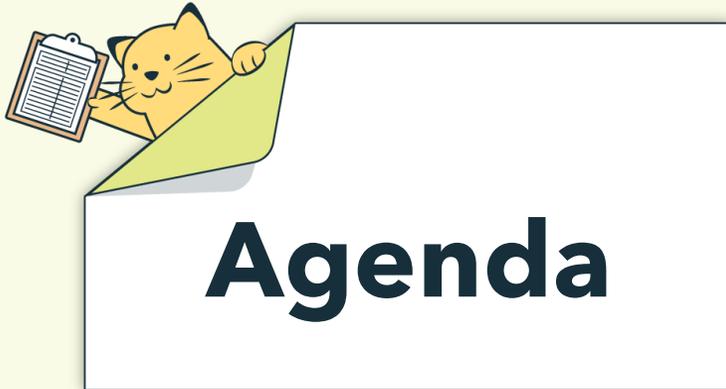
ENERGYCAP | Help Center

Find help by solution

- 
UtilityManagement
- 
CarbonHub
- 
SmartAnalytics
- 
Utility Company Platform

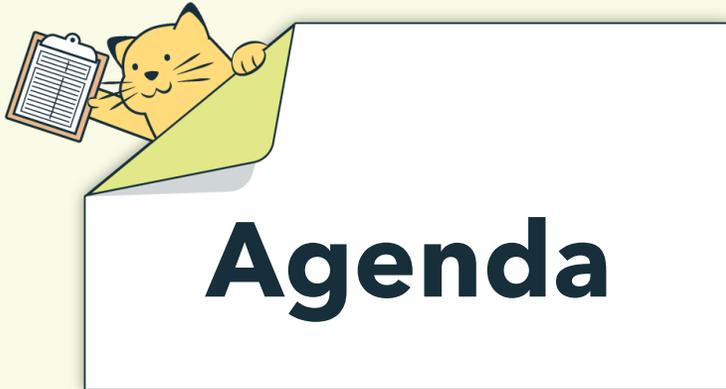
Connect with fellow EnergyCAPers

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

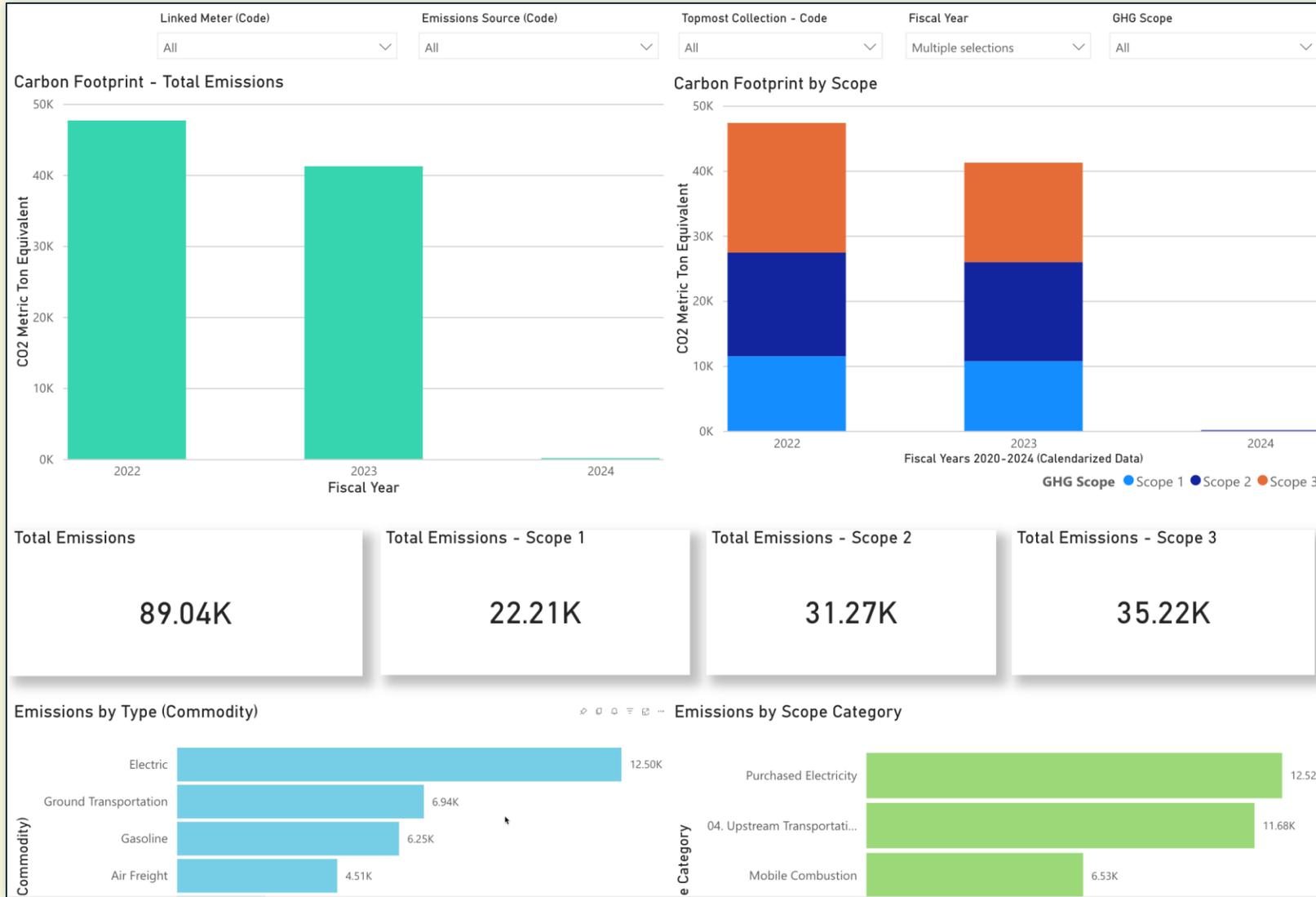


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Cost Categories

- **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

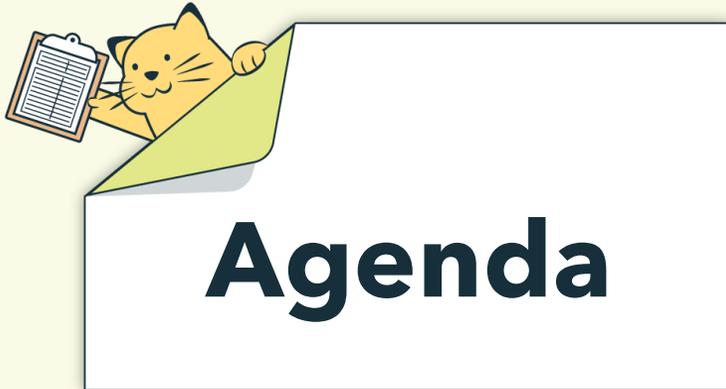
- Start from scratch or use provided templates
- Combine data across your EnergyCAP products
- Add only the columns/data you want to see
 - Add your own Custom Fields
- Group and organize your data
- Easily export reports
- Take advantage of all the other reporting features:
 - Saved reports
 - Shared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



CATALYST '24

Let's see it in action

EnergyCAP constantly innovates and delivers value to you



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EnergyCAP constantly innovates and delivers value to you

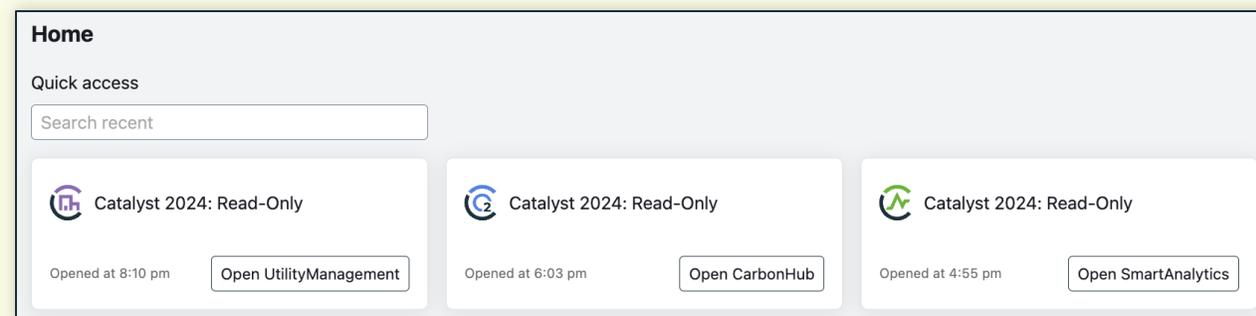
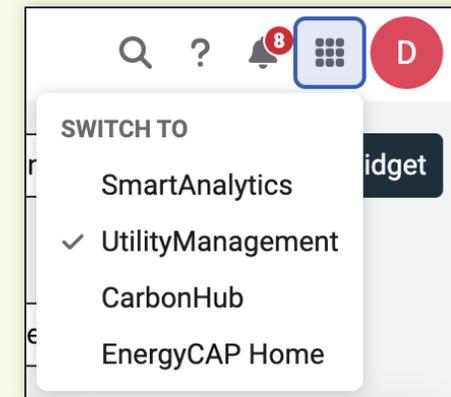
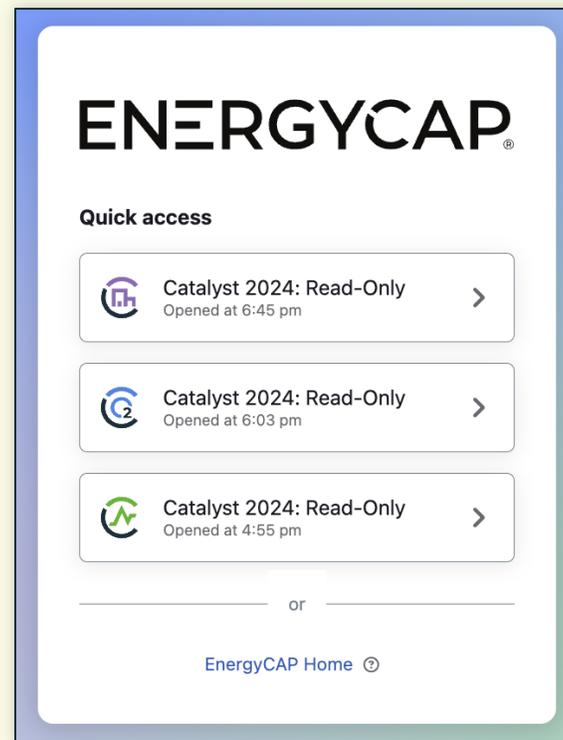


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Experience all three products at Catalyst

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



ENERGYCAP



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

EnergyCAP constantly innovates and delivers value to you



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- **Making the most of your Catalyst experience**



Jump In!



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