

# EnergyCAP Professional Version

## Conversion from Desktop to Online

### Post Conversion Checklist, v5

**IMPORTANT! Complete this checklist *immediately* after conversion!**

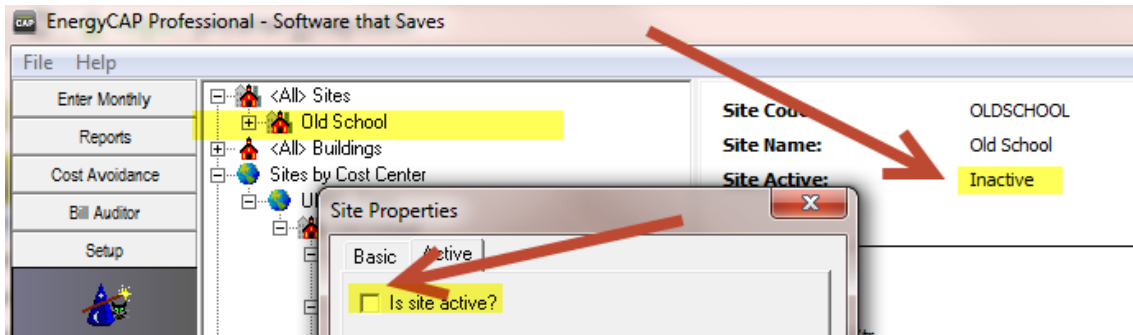
- **Configure program preferences:** Use the green menu bar to select Administration → Global Settings:
  - Enter your *Organization Name*. This will appear in report headings.
  - If you want your own *logo* to appear in the upper left corner of the screen in place of the EnergyCAP logo, upload the logo image.
  - We recommend you set the *logout timer* to 480 minutes to prevent inadvertent timeouts during the business day.
  - The *fiscal year* is set to begin in January by default. If you prefer a different fiscal cycle (ex: July to June) enter the fiscal year start month. Important note: This change will not appear immediately on Buildings & Meters charts and graphs; the summary data behind these charts is updated every few hours.
  - We recommend you configure the *Display Report Filter Values* option as *Search if Count Exceeds 50*.
  - Be sure to click *Save* when done.
  - If you want to change your Password, click the More button in the upper right corner of the screen, then Preferences.
- **Activate bill entry audits.** Click Administration → Workflow Settings. We recommend you activate *Audit Bills with Quick Check Audit Group* and set the minimum Pay Amount to \$300. (This means that bills less than \$300 will be audited for dates only, not usage or cost.) As you enter and Save each utility bill, it will be audited.
- **Verify building weather station assignments.** Use the green menu bar to select Reports, then All Reports – Setup Reports – Report SU58. On the filter selection screen, select *Place Type Name* equal to *Building*. If the report shows that any buildings are not assigned to a weather station, you must be sure to enter an address and ZIP code for the building. This will automatically link to a weather station. To enter a building address, use the green menu bar to select Buildings & Meters, highlight the building name in the tree (be sure you highlight the single-icon building name and not a double-icon parent site above the building) then click the Building Properties tab in upper right, then click the pencil at lower left below the Treeview to enter edit mode, then enter the address using the pencil icon to edit the existing address fields.
- **Set the Buildings & Meters view option.** While on the Buildings & Meters view, click on the gear icon at lower left. We recommend you set the display option to *Both Code and Name*.
- **Set the Accounts view option.** Use the green menu bar to select Accounts. This is the view of all utility bill accounts. Using the gear icon in lower left, set the display setting to *Both Code and Name*.
- **Set up additional users.** Use Administration → Users & Permissions to set up additional user logins. Most users should be added with a user role of *Director – Full* (view only, full access) or *Public* (view only, Buildings & Meters). If you have more than one Energy Specialist, create new users with either the Administrator or the Energy Specialist user role. (The Energy Specialist role has limited permissions.)

## **Advanced topics**

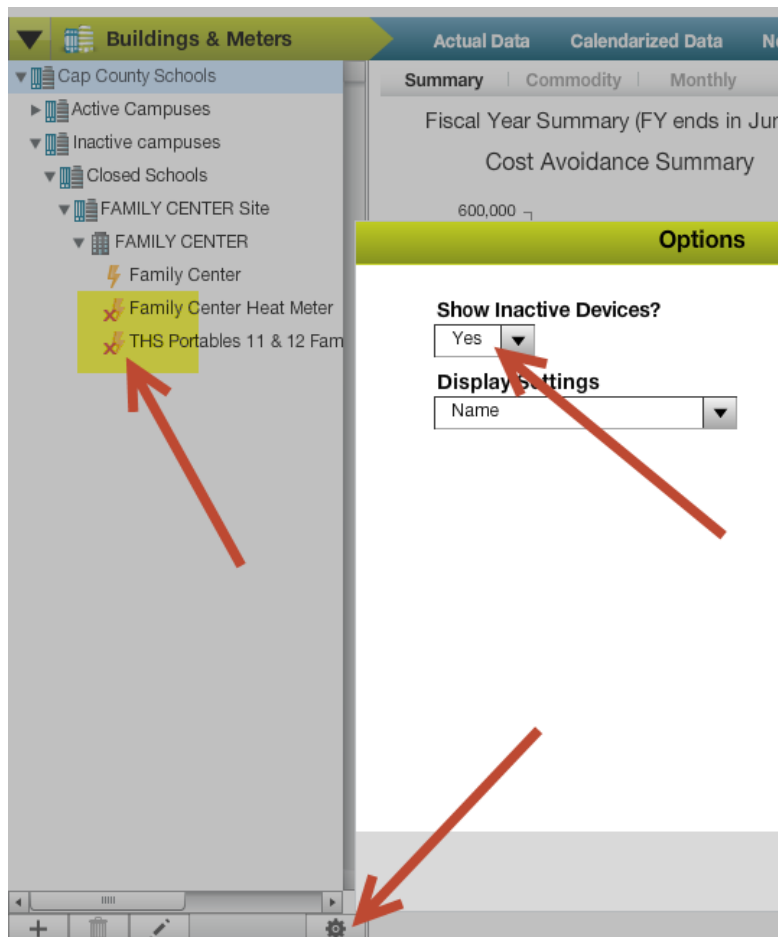
- **Reorganize the Buildings & Meters tree.** You might be able to “clean up” the Buildings & Meters Treeview by eliminating redundant or unnecessary nodes. You can drag and drop meters and buildings. To delete an unnecessary site (double icon) node, be sure no buildings or meters are under it, then highlight it and click the garbage can icon below the Treeview.
- **Edit Site, Building, Meter and Account Display Names.** To rename Treeview items in order to make the display name more descriptive and useful, highlight the item and then click the pencil icon below the Treeview.
- **Pop-Up Blocker.** Your browser may have the pop-up blocker enabled. This will interfere with reports. We recommend you turn off the pop-up blocker, which is probably done via your browser’s *options/settings* tool button and then select *privacy*.
- **Google Chrome Browser.** Many users have found EnergyCAP Online to work better/faster with Google Chrome browser than Internet Explorer. You can download Google Chrome for free at [www.Google.com/Chrome](http://www.Google.com/Chrome) (your IT administrator may be needed to allow installation on your work PC).
- **Get on board with ENERGY STAR!** EPA’s ENERGY STAR program is a great way to independently validate the savings shown in EnergyCAP and to publicize your energy management success. And EnergyCAP makes the ENERGY STAR submittal process easy and automatic. If you’ve submitted to ENERGY STAR from Pro Desktop, you can continue forward with Online. If you have not yet participated, now’s the perfect time to get on board! See the new ENERGY STAR training video at: <http://www.energycap.com/products/pro-onln-videos>.
- **Change Global Units from MMBTU to KBTU.** Many Pro Desktop databases were set up with MMBTU as the common reporting unit. We recommend KBTU instead because ENERGY STAR and most national energy efficiency indices use KBTU. Use Administration → Units of Measure → Global Reporting Units to change to KBTU. A short instructional video on the topic is available at: <http://www.energycap.com/products/pro-onln-videos>.

## Technical Notes on Conversion

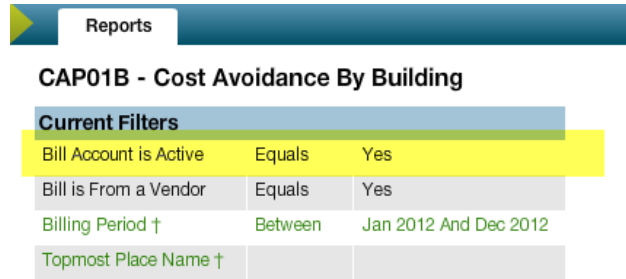
- **Inactive Sites.** In Pro Desktop, you were able to indicate that an entire Site, and all buildings and meters under it, were Inactive by unchecking the Site Properties active flag.



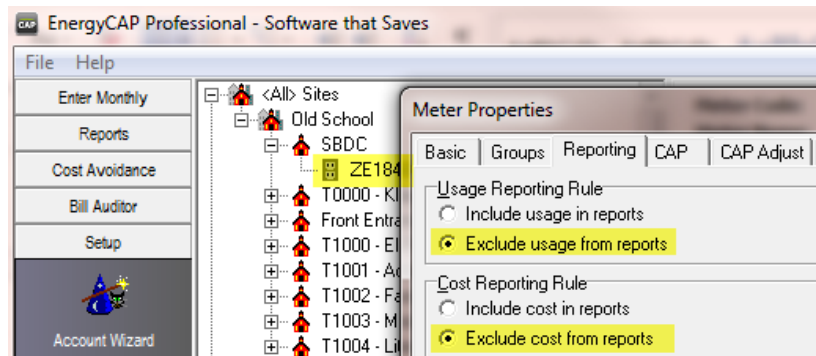
- Pro Online does not have an inactive site flag. It has Inactive flags at the individual meter and account levels instead.
- Sites coded in Desktop as Inactive will appear in the Buildings & Meters Treeview. All meters and accounts under the site will be coded as Inactive, and will not be visible unless you use the gear icon below the Treeview to “Show Inactive.”



- Inactive meters and accounts are normally filtered out of all reports and charts via the *Bill Account is Active* filter which normally defaults to Yes.



- To show both active and inactive accounts, meters and associated bills on a report, select the *Bill Account is Active* filter and click *clear* to remove it.
- To change an account from inactive to active status, use the Accounts Treeview, find the account, click the pencil edit icon under the Treeview, and then click the Active button on the General tab.
- Meters in Desktop have a reporting property called Exclude Usage and Cost in Reports. If EITHER of these fields is set to true in Desktop, the meter and account are also set to inactive in Online.



- Because the topic of Inactive accounts and meters can be confusing, there is a complete training video on the topic available at: <http://www.energycap.com/products/pro-onln-videos>
- **Baselines in the 1990's.** Your Desktop weather data was NOT converted. All weather data is now pulled from the web-based [www.WeatherDataDepot.com](http://www.WeatherDataDepot.com) database which originates with AccuWeather. This database has about 14,000 ZIP code-based stations. Most have data beginning 1/1/95, although some begin several years later. This means that if you have baselines prior to the earliest weather data, you cannot reprocess the baseline. The baseline processor will skip over any meter for which weather data is not available, leaving the existing converted Desktop baseline data intact.
- **Better greenhouse gas factors.** CAP15 and 19 reports that show greenhouse gas emissions and carbon footprint will be different. Desktop used carbon factors entered by the user while Online uses an EPA database called eGRID to assign the latest factors for your state. Electric GHG conversion factors are automatically set and updated annually in Pro Online. Electric GHG factors are assigned in Pro Online based upon the State that the meter's parent building is located in, per the building's address field. If the State is blank, the factors will be blank. They will update automatically overnight when a State is assigned.

## Reasons for Variances between Desktop and Online Reports

You may decide to run and compare reports in Desktop vs. Online. When doing so, expect to see some slight differences in values in some cases. These variances can be due to:

- **Weather.** Any variances in weather data can cause differences in baselines, weather adjustments and cost avoidance. Variances can be due to:
  - Errors or omissions in manually-entered Desktop weather data. Online uses a web-based weather data database that is accurate and complete.
  - Extreme climate weather data. Desktop has a 99F limit that treats days over 99F as potentially corrupted data. This affects any month that has more than 6 days of 100F mean temperature or more.
  - The weather database was vastly expanded in October 2011 from about 800 stations to about 14,000. Stations were also remapped. For example, the station called ABC in Desktop may have previously been mapped to a regional airport, but with the greatly expanded choices it may have been remapped to a ZIP code closer to downtown. That means that Desktop would have a combination of 'old' weather data prior to 10/2011 and 'new' data after. Online would use only the later mapping. This can result in non-trivial variances in some coastal or mountainous locations where a station 50 miles away can have significantly different weather. In all cases, online weather data is better – it is more local to the actual building ZIP code.
- **Data errors in Desktop.** During conversion testing we found a few cases of meters in Desktop that had a few bills that were inexplicably assigned to different accounts. Online has a strict account-meter relationship, so meters with multiple account assignments may not appear on some reports as you may expect. The best way to check this is to view the Bill List for the meter under the Buildings & Meters Actual Data tab and see if any bills have different account codes in the Account column.
- **Meters with Exclude Use or Cost on Reports flag.** There were some inconsistencies in Desktop reports as to data included or excluded when these meter flags were used. In the conversion, any meter with either flag set to exclude will be excluded from all reports because the account has been set to Inactive.
- **Bugs in Desktop reports.** During conversion side-by-side testing we spotted several minor bugs in Desktop reports. For example, Desktop ignores bills with zero BATCC use and zero BATCC cost, even though there may be actual use and cost. These were corrected in Online versions of the same reports.
- **Include Meter in Cost Avoidance.** Online has a new checkbox that allows you to include or exclude a meter from cost avoidance calculations and all CAP reports. This is a great way to keep a meter active for viewing and reporting, but remove it from all CAP reports and charts.
- **Leap year improvement.** If your baseline year has any days in a leap year (2000, 2004, 2008, 2012) then there will be very slight differences due to improved leap year logic in Online. The CAP06 report can be used to illustrate slight baseline year usage allocation improvements.

## **Technical Support vs. Training**

As always, EnergyCAP's Technical Support team is here to help. However, with almost 1,000 client databases to convert from Desktop to Online and about 2,000 routine users who are learning an all-new system, Tech Support could be overwhelmed with calls. Tech Support must concentrate on true technical support problems. We kindly ask your help in limiting your calls to actual technical problems (error messages or missing data, for example).

In general, any question beginning with "How do I..." is not a Tech Support question but rather a training question. You should first check the many help articles built into Online (see the ? icons above many charts and graphs). Next, see the Help button in upper right. This will guide you to the online Documentation in which you have a convenient search box and many helpful articles and videos.

As a last resort, use the Help button again to access Support. You can search here for any current tech bulletins or submit a ticket for a prompt email response.

Remember to use our Sample Reports Viewer (<http://www.energycap.com/support/sample-report-viewer>) for assistance on finding the report you are looking for. Online has over 200 reports to choose from.

## **EnergyCAP Pro Online License Agreement**

The license agreement has changed. The new agreement is available at [www. EnergyCAP.com](http://www.energycap.com):

[http://www.energycap.com/media/downloads/EnergyCAP\\_Professional\\_Online\\_License\\_Maint\\_and\\_Hosting\\_Agreement.pdf](http://www.energycap.com/media/downloads/EnergyCAP_Professional_Online_License_Maint_and_Hosting_Agreement.pdf)