



# Installation Instructions: Client-Hosted Database

## EnergyCAP® Enterprise 6.2 SP1

These instructions are for initial installation of EnergyCAP Enterprise Release 6.2 Service Pack 1 with a client-hosted database. The Service Pack requires a prior installation of EnergyCAP Enterprise 6.2.

The new Service Pack 1 release is 6.2.64.xxx, where 64 is the database version and xxx represents the current build number (127 or higher).

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## Overview

EnergyCAP Enterprise Release 6.2 Service Pack 1 installation is simple and quick.

Here is an overview of the installation process:

1. Download the EnergyCAP Setup files (see [Appendix A](#)).
2. Execute the Setup file to install EnergyCAP Release 6.2 Service Pack 1 on each workstation.
3. Use one workstation to perform Post-Installation Actions:
  - Update Audits
  - Update Reports
  - Update Spreadsheets

Follow all of the steps indicated below for each process. Some steps may require IT assistance.

## EnergyCAP Enterprise Installation Procedure

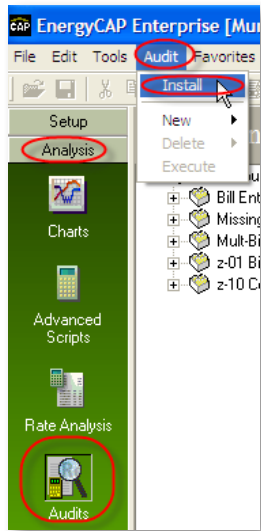
Install the new EnergyCAP software application on user workstations using the Setup file provided:

1. If you have not already done so, download all required installation files and installation instructions per the instructions in [Appendix A](#).
2. Double-click the Setup file (ece\_setup6-2-64-xxx\_SP1.exe) to run the installation.

**Note:** “xxx” represents the build number (127 or higher).

3. Follow the installation wizard prompts to complete the installation.
  - a. When selecting the installation directory, make certain to select the directory of your installed 6.2 release.
  - b. From the Select Components window, leave the Local data engine option unchecked.
  - c. Following the installation, you will receive a prompt to reboot your system. Click **OK** to restart the computer.
4. After your PC has successfully rebooted, launch EnergyCAP by double-clicking the EnergyCAP.exe file from the installation directory.
5. Login to EnergyCAP Enterprise as the admin user.
6. Click **Help > About** to verify that you are using the most current release. The version number of EnergyCAP 6.2 SP1 is 6.2.dd.xxx, where dd is the database version number and xxx is the number of the current build.

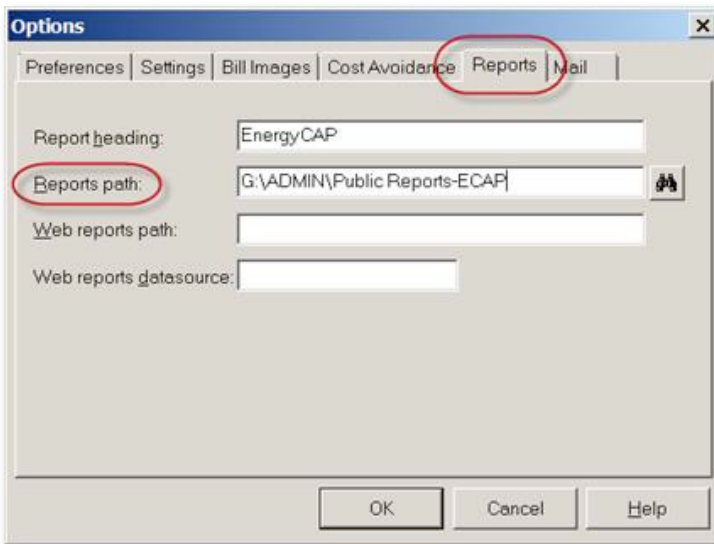
This concludes the EnergyCAP installation procedure.



## Post-Installation Actions

These Post-Installation Actions perform various database maintenance tasks and must be completed once from one workstation by a user with “admin” user rights in EnergyCAP. There is no need to perform these tasks from each workstation.

1. Audit Updates: Update your audits using this procedure.
  - a. Launch EnergyCAP as an administrator and click **Analysis > Audits**. The Audit Manager will be displayed.
  - b. Click **Audit > Install**.
  - c. The **Install Auditors** window will open. Click **OK** to install audits. Audits will be updated. The Install auditors window will display **Complete** in the Results text box.
  - d. Click **Close** to close the Install auditors window.
2. Report Updates: Reports are updated by downloading the latest EnergyCAP report files (Crystal Reports .RPT files) from the EnergyCAP website and installing them into the user report folder(s). Update EnergyCAP reports per the procedures below:



**Note:** The report update process will vary from organization to organization depending on how reports are managed internally. The procedure below will update all reports for all users who share report files on a common network drive. Individual users who wish to maintain private reports on their local hard drive will need to update their workstation using a similar procedure. The individual user’s report path can be specified from the *Report Manager* (**Tools > Options - This Manager**).

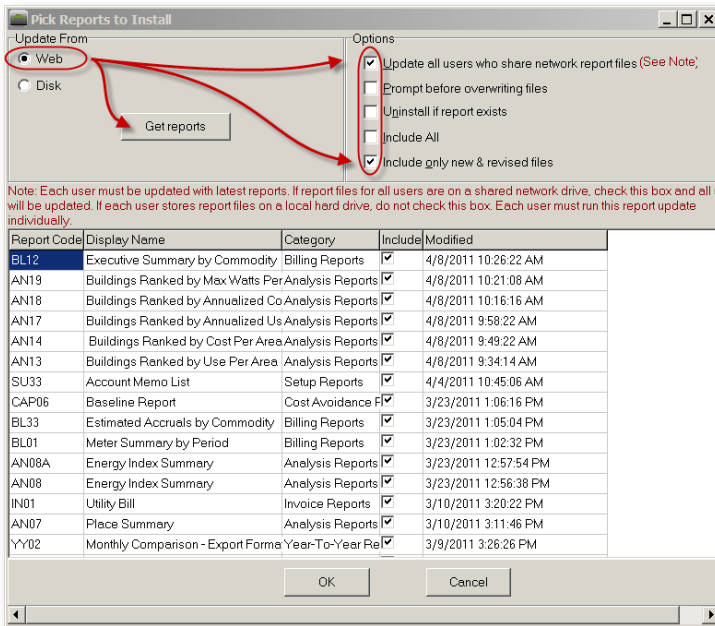
- a. Determine the final location(s) for the downloaded report files. To view the global report default location settings in EnergyCAP, click **Tools > Options - Global**. The Options window will open. Then click the **Reports tab** to display the current Reports path.
- b. To download and install the reports in EnergyCAP, navigate to the *Report Manager* (**Reporting > Reports**).

**Note:** If the Reports icon is not among the available options under the **Reporting** menu bar, you may be connected to the database via an internet connection. You must connect to the database via a LAN connection in order to update reports.

- c. Click **Update Reports shortcut** button from the *Report Manager*. The **Pick Reports to Install** window will open.

**Important Note:** You will have to expand the **Pick Reports...** window to view the necessary options/controls

- d. Select the **Update from Web** radio button; then click the **Get Reports** button.



- e. Wait for file download—it may take a few minutes. When ready, the **Pick Reports to Install** window will be populated with report names.

- f. Ensure that checkbox settings for **Options** match those on the image above (check the **Update all users...** checkbox and the **Include only new & revised files** checkbox).

**Notes:** If you fail to check the **Update all users...** checkbox during the initial report update, it will be necessary to update reports for each EnergyCAP user individually.

Reports are listed in order by Modified date, latest at the top. The report list will automatically default to include only reports that are new or have been revised since the last report update.

- g. Click **OK** to begin the report installation process. New and updated report RPT files will be installed into the directory specified in the Reports Path and the reports will be registered in the database for designated user(s). Report stored procedures will be updated in the database.

**Note:** This process may take a long time if you have many users to update.

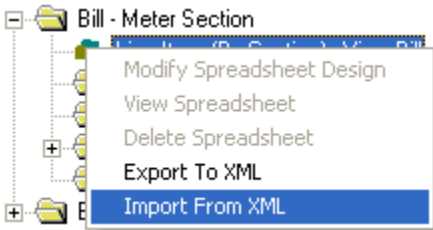
- h. When the report update is complete, click **Close** to close the **Log** window.

**Reminder:** If all users are accessing the same common Reports Path on a shared network folder, no further action is required (assuming that reports were installed with the Update all users checkbox option). However, if any users access reports from a Reports folder on their local hard drive, the reports installation must be repeated on these individual user workstations, leaving the **Update all users...** checkbox unchecked.

**Note:** Reports are updated monthly. To keep up to date on what reports have been modified from month to month, please see the online list at [www.EnergyCAP.com/reportupdates](http://www.EnergyCAP.com/reportupdates).

3. Custom Spreadsheet Updates: Spreadsheets are updated by importing the latest .xml spreadsheet template file into EnergyCAP. The new .xml file was placed in the EnergyCAP program directory during the SP1 installation process. To import the Custom Spreadsheets into EnergyCAP:

- a. Navigate to the **Spreadsheet Manager** (click **Analysis > Custom Spreadsheets**). The Spreadsheet Manager will be displayed.
- b. Right-click on any spreadsheet node in the Custom Spreadsheets tree.
- c. Choose Import from XML. Or click **Import** from the **File** menu. The **Open** window will appear.
- d. Browse to the program directory and select the .xml file you wish to import. The file associated with this release is ECAP\_CustomSpreadsheets\_v6\_2\_DB64.xml.
- e. After selecting the desired file, click the **Open** button.



**Note:** The import process will import the spreadsheet design, including filters and output columns, to the new database. The list of available spreadsheet templates will be updated with the options.

Congratulations! You have completed the installation. Please read the **Release Notes** (available in the Setup file download directory—see [Appendix A](#)) to familiarize yourself with the changes.

## Appendix A: File Download Procedure

1. Open your web browser and navigate to [www.EnergyCAP.com/showdownloads.asp](http://www.EnergyCAP.com/showdownloads.asp).

2. Input the Username and Password indicated below in the fields provided.

Username: energycap62

Password: upgradeto62

3. Click **Login**. The EnergyCAP Enterprise Program Setups download folder list will become visible.



4. Expand the **EnergyCAP Enterprise Program Setups** download folder list by clicking the 'plus' (+) sign.

5. Expand the Release 6.2 folder and click to select the executable file (ece\_setup6-2-64-xxx\_SP1.exe). The xxx should be 127 or greater. The **File Downloads** window will open.

6. Click the **Save** button and choose a location on your hard drive to save the installation file.