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Release 6.1.60.71 (Service Pack 2)

NOTE: Release Notes no longer include updates and fixes relating to REPORTS. For the most current information regarding monthly report updates, see our website **Report Updates** page: (www.energycap.com/reportupdates)

MINOR ENHANCEMENTS

Ticket#	Description
969	Batch can be closed by another user. Added Close Batch right-click option to the batch list in Work Flow Manager for users with Work Flow-modify permission. This allows a supervisor to close a batch created by another user, which can be important when a batch has to be closed but the batch originator is not available.
1315	Edit estimated flag and note fields (Route Manager and Facility Manager). Added edit capability for <i>monthly</i> meter reading and channel data fields (estimated flag and notes). Use the Advanced option.

FIXES

Ticket#	Description
Account Manager	
854	G/L Overrides. Fixed problem with override function. Now, when a G/L code is overridden via the bill entry screen, all bodylines for that meter are changed, not just a single bodyline. Enhanced user documentation.

Ticket#	Description
1053	Split/Submeter manual bill entry. Bills created by the split processor, calculated account processor (from submeter readings) and virtual account processor (VB scripts) are coded with bill type = "To customer" because internally created bills are considered to be chargebacks/rebillings. However, when bills for these types of accounts were created manually (not by the processors), they had been coded as bill type = "From vendor." Now, manually created bills of these types are correctly coded as "To customer." This avoids confusion when report status filter for <i>Bill is From a Vendor</i> is used.
1094	System crash on automatic bill approval. Fixed error that occurred when an automatically approved bill was manually unapproved and then re-processed.
1144	Account/Meter Wizard. Prevents the wizard from suggesting a meter display name or code that is too wide due to a wide building code.
1164	Set Template icon from the Assign Templates and GL Records window now works as it should instead of generating an error.
1285	Bill Entry - Meter History tab. Non-standard bills are now hidden when the user has set the "Hide Non-Standard Bills" option in the Account Manager.
1331	Bill Split Processor. Processor now successfully splits calculated account bills when launched from the right-click menu for a single calculated account.
1342	Account Find. Enabled search/find for inactive accounts. Added checkbox from the Account Selection window so the user can include or exclude inactive accounts from the search. Allows pasting of special characters.
1346	Bill Splits. Enhanced design of the Bill Splits setup window to improve visibility of version effective dates. Improved logic of default date selection.
1382	Billing Period Assignment. Accruals and adjustments are now properly ignored when the billing period is set during manual bill entry or bill import. Accruals had previously caused some billing periods to be shifted forward one month.
Audits	
1320	Audit 10. Fixed error in billing period year display. It now correctly identifies the billing period of the audited bill.
Budgets	
1332	Budget edits. Fixed 'floating point' error that was being generated when there were multiple budget revisions.

Ticket#	Description
Channels	
448	Counter Wizard. Added intro window to Create Counter Wizard; the counter creation process is explained better.
449	Counter Wizard. Streamlined and clarified the wizard to avoid confusion when creating new counters. The choice to exit or create another counter is clarified.
450	Counter Properties. Removed unused properties tabs.
Cost Avoidance Manager	
1354	Issue Tracker. Fixed bug where issues not assigned to a bill (assigned directly to a meter) were not showing up in the CAP14 report.
Custom Spreadsheets	
1304	Column headers. Eliminated the '/' character from field names (such as <i>G/L Subcode</i>) that caused problems when connected to the database via an Internet connection.
Facilities Manager	
1328	Square footage changes. Fixed problem where List out of bounds error was generated while adding building square footage.
Security	
1308	User Permissions. Fixed bug where the "Select All" permissions option was not selecting three of the permissions: Cost Avoidance Calculations (Execute) Facilities/ENERGY STAR submittals (Execute) Other Settings/Database Administration (Modify)
Setup	
503	Unit System. Made the Convert To drop-down display wider to prevent truncation of units of measure label.
851	Setup Sheet Importer. Logic improved to allow an account code to be used on more than one account, provided that the vendors are different. This can be helpful in deregulated situations where both the supplier and distribution company use the same account code.
708	Email Report Distribution List. Fixed transposed labels for First and Last Names.

Release 6.1.60.60 (Service Pack 1)

MINOR ENHANCEMENTS

Ticket#	Description
#1250	Report Installation - Updated network report installer to include checkbox (default checked) to only install new and revised report files (files with a different date/time than the user's currently-installed reports).
#1206	Budget Creation - Added "Use Latest" usage option for creating a new budget based on most current values. This allows a user to specify a two-year historical window for budget creation, but when one month has bills for both this year and last year, only the most recent will be used. The two bills will not be averaged.
#1023	Account Search - Added improved basic account search. New search locates and displays accounts by searching Account Code, Account Display, Street Address, and Previous Account Code fields containing a match for the search string.
#1217	Weather Data Import - Enhanced the weather data Import from Web feature. When the weather station's mean daily temperature units of measure is degrees C, the importer converts the AccuWeather data (which is always provided in degrees F) to degrees C. EnergyCAP now correctly records, displays and reports the data in degrees C.
#1209	Work Flow Manager Bill Lists - New options have been added to Work Flow Manager to filter the bill lists by a Place or Meter Group. The filter setting is unique to each user. One valuable application of this new feature is to allow specific users to manage bill approval and problem resolution processes.

FIXES

Ticket#	Description
Account Manager	
#1240	Fixed bug where bill entry process was not properly reset after entering a master bill for an account with bill splits.
#971	Fixed bug where some accrual values were appearing on Account charts, such as Account Cost/Day.
#1225	Made minor change in bill entry date fields that makes it easier to enter bills that have legitimate billing gaps from last bill to current bill.
Audits	
#1026	Fixed bug that caused the system to crash under some conditions with audit 26.

Ticket#	Description
Budget Manager	
#1236	Revised default settings for budget changes. Added global Include/Exclude toggle for all budget months to streamline budget revision process.
#1248	Fixed bug causing Access Violation message when viewing/modifying a new budget.
#1253	Fixed a bug that prevented a right click from the View/Edit Budget grid from copying the contents to clipboard for pasting into a spreadsheet.
Cost Avoidance Manager	
#978	Fixed minor graph display error relating to the Weather Normalization icon.
#1208/#1214	Fixed bug where Cost Avoidance Processor was not working properly for accounts with more than one bill in the billing period.
ENERGY STAR	
#1233	Updated Place Properties>Buildings tab so that changes to a building's floor area now automatically update the ENERGY STAR 'gross floor area' field.
Report Manager	
NOTE: Reports are updated monthly as bugs are resolved. A new report ZIP file is posted for download/updating in months that changes were made. To keep up to date on what reports have been modified from month to month, please see the online list at http://www.energycap.com/reportupdates . EnergyCAP recommends that users update reports monthly using the procedure appropriate for their organization.	
Workflow Manager	
#1171	Changed G/L Subcode Selection options/logic so that when G/L subcodes have a drop-down list of available choices and one of the choices changes or is removed, the original (outdated) value will still be shown in the G/L properties and will be displayed in red.
#1268	Bill Entry Account Code field: Windows Ctrl - V key combination now pastes text, such as account display, that contains spaces and other special characters.

Release 6.1.60.42 (Initial Release)

MAJOR NEW FEATURES

Ticket#	Description
#135	<p>Budget Manager: Major improvements to improve functionality and speed.</p> <ul style="list-style-type: none"> • Budget Edit window integrated into Manager view with new tab (View/Edit Budget). This greatly improves navigation; allows you to jump to another manager and back again without closing the budget view. • Added Place and Meter search capability from the Budget window. • Budgets are now created on an account-meter basis. That means that every combination of an account & meter has its own budget. Previously, budgets were on a meter only basis. Although this is sufficient in most cases, it is insufficient for deregulated accounts that have both supplier and distributor accounts sharing one meter. The budget Place/Meter tree indicates multi-account meters and shows the separate budgets for each account-meter combination. Note: For budgets converted from prior versions of EnergyCAP, all budget cost will be assigned to the distribution meter (the meter that has the usage attached to it). • Audit 48 (Actual vs. Budget) will now function much better in deregulated meter situations.
#1004	<p>Deregulated Meters in Cost Avoidance: Program internal processes revised to better accommodate deregulated (Supplier/LDC) scenarios. New tab in Cost Avoidance Details window provides breakdown of avoided cost/use for both the LDC and the Supplier.</p>
Multiple	<p>Major Report Enhancements: All reports were enhanced as follows:</p> <ul style="list-style-type: none"> • Filters added for consistency from report-to-report; ensured that topmost, group and status filters are available on all reports where applicable. • Query and calculation logic moved from report files to database stored procedures for all reports. This makes it easier to test and troubleshoot complex reports. • Ability added for a user to store a unique report heading in their Report Manager options, thereby overriding the global organization name. <p>Dozens of reports were enhanced and/or corrected as to format and calculations. See the Report Manager section below for further information on periodic report updates.</p>
#351	<p>Contact Manager Vendor Window Enhancement: Enhanced linking to Accounts from Vendor Contact Manager. The Contact Manager Vendor window now displays a list of Accounts associated with the highlighted Vendor. A search box was added to quickly find accounts in the Vendor Account list. Searched columns are marked with a magnifying glass icon. Double-clicking the Account Code opens the Account Properties window. A right-click menu enables the user to open the Account Properties window OR locate the account in the Account Manager.</p>

FIXES/MINOR ENHANCEMENTS

Ticket#	Description
Account Manager	
#968	Bill Entry Meter History tab: Corrected display error. Highlight colors now indicate the currently-opened bill, as well as bills from the same month in preceding years (if available).
#1104	Bill Entry Window: Added highlight bar to current bill line items to enhance visibility. Particularly helpful for more complex bills.
#972	Bill Export: Added new functionality permitting selection of Topmost Cost Center for bill export. Dependent on User Permissions.
#404	Bill View/Edit Window Enhancement: Added user identification to Bill Properties date fields (Approval Date, A/P Export Date, G/L Export Date, and Was Split Date) .
#981	Bill Lists: Added "Estimated" column to bill lists in Account Manager and Work Flow Manager.
#1037	Less Cluttered Account Manager Bill Lists: A new checkbox at the top of the Account Manager bill list enables display or hiding of voided bills and accruals. This option can be set for each individual user.
#1093	Bill Message View without Multiple Clicks: Display of longer bill message, audit results and message comments has been improved when viewed from the bill entry/edit window.
#975	Calculated Accounts and Virtual Accounts: Both processors now take the user's topmost permission into account when processing bills.
#964	Calculated Accounts: Enhanced calculated account functionality to permit determination of average unit cost associated with multiple meters/commodities .
#773	Delete Report Email Batches bug: Fixed bug preventing deletion of Report Email Batches.
#344	Deleting Users: Fixed bug preventing Users from being deleted when the user record is not referenced in other records (such as bill created by)
#1006	EDI Imports: Enhanced performance of import process for large EDI files.
#558	MeterSummary helper function in Virtual Account Scripts: Fixed a bug preventing the MeterSummay helper function from working.
#1130	Monthly Charts: Fixed error where chart labels were disappearing from X axis.
#883	Virtual Account Scripts: Added functionality to permit use of meter read dates.

Ticket#	Description
#1008	Virtual Bill Processor: Enhanced logic to identify bills created by virtual bill processor as “To Customer.”
#748	Workflow Wizard Date field display options: Removed "required" from optional date fields in the Workflow Wizard Header window. These fields are automatically populated when displayed.
#1071	Account Vendor: Fixed a bug that prevented the vendor from being changed on Account Properties in the case of >1 meter on one account.
#1051	Limit Processors to User’s Topmost Permission: Calculated accounts, splits, virtual accounts.
#1124	Split Processor Honors Topmost Node: When executing the split processor as a right-click from a location in the Account Manager tree, the processor honors that node as the topmost.
#831	Split Processor Requires Approval: Confirmed that a bill must be Approved before it can be split.
Accrual Manager	
#501	Accrual External Task: Created documentation for this feature and posted to the Web-Based User Manual (http://help.energycap.com/reference/external-tasks-in-energycap/)
Analysis	
#959	VB Debugger: Squelched annoying premature launch of this analysis tool when using the EDI importer, rate analysis or other processes that use VB scripts
Audit Manager	
#835	Audit 25/26/30 fix confirmation: These audits no longer include the same month in the prior year.
#1143	Audit 46 Account Period: The Account Period test in Audit 46 had a minor glitch related to bill start date.
#958	Audit 48: Enhanced audit to conform to the Budget Manager enhancements by auditing bills on an account-meter basis instead of just a meter basis. This is a needed improvement for deregulated bills that have separate supplier and LDC.
#804	Skipped bill in Open Batch audit: Fixed audit bug so that first bill in open batch is not skipped when auditing multiple bills.

Cost Avoidance Manager	
#1052	Cost Avoidance Processor: Now honors topmost place permissions for the user running the processor.
#1074	Global Meter Update: Now honors topmost place permissions for the user running the processor.
#1072	Show All Issues Checkbox: When focus is on the topmost tree node, a checkbox appears that allows a user to show all Issues or squelch the display. It is convenient to squelch display when at topmost because for a database with thousands of Issues, the display can take time.
#1105	Issue Tracker and Cost Avoidance Place tree: Added a meter search option (binoculars icon).
#983	Issue Tracker # Search Added: Added search by issue #. This is helpful for organizations with large numbers of issues tracked.
#291	Special Adjustments: Fixed problem with saving special adjustments.
#1101	CAP Comparison Tab: Fixed problem with the display of incorrect baseline values when there was a manual CA adjustment.
Custom Spreadsheets	
#828	Cost Center duplication bug fixed: The four line item-based spreadsheets were updated to fix a multiplication/duplication bug relating to the number of Cost Centers.
#1049	Line-Item Custom Spreadsheet Update: Updated budget-based spreadsheets to take into account the new account/meter relationship in Budgets.
#274	New filters: Added Topmost Cost Center and Topmost Place filters.
Database	
#888	Field lengths increased: Enabled use of 32-character Place Code and Cost Center Code fields (previously 16 characters for some functions).
External	
#1041	Script Help documentation: Updated link to the VB Script Reference Manual (vbs55.chm).

Facility Manager	
#281	Facility Manager: Enhanced performance so that moving Places/Meters is speedier.
#1128	Bill List: Updated bill lists to sort by billing period and then by billing period end date.
#976	Channels: Updated meter channel database options to include Actual/Estimated (0/1) column. Also added Observation Note (text field).
#1120	Channel Daily/Monthly Average: Channels set to 'average' (as opposed to 'total') did not return correct results when there was >1 observation in a day. This has been corrected.
#726	ENERGY STAR: Updated Place Properties ENERGY STAR tab to accommodate EPA Portfolio Manager updates (subspaces). Added functionality for adding Subspaces, and submittal of "Other" spaces for EPA return of Site Energy Intensity (SEI) in lieu of an ENERGY STAR rating. Added Rating History tab. Added ability to use Reset button to send a delete building command to Portfolio Manager. This allows a complete refresh of the building data and is needed when you remove a meter or subspace.
#933	Energy Star: Updates to match changes/additions to EPA schema for submission.
#980	Facility Manager Options: Added "Suppress Accruals" checkbox (default). This hides accruals from the bill list associated with the meter.
#1066	Facility PowerViews: Place PowerView charts on the Monthly and Commodity tabs now display correct info even if fiscal year and current computer calendar year are out of sync.
#1057	Place Commodity PowerView: Fixed problem with demand chart displaying cost data.
#1082	Place Types: Added additional Place Type option of "Physical Structure" to the Create Place Type window, in order to help clarify the nature of the node. This is used in the web browser to indicate which places should display building properties (floor area, for example) and which are strictly organizational hierarchy nodes.
Group Manager	
#758	Autogroup Update: Group Names now automatically change with changes to related data (Commodity, Primary Use, Tariff, Vendor).
Rates Manager	
#1092	Rate Properties: In addition to the list of Accounts Assigned, the Rate Properties page now includes a listing of all Calculated Accounts assigned to that rate.
#1062	Rate Versions: New flexibility offered for modifying/deleting rates.

#1061	Rate Versions: Right-click option added for convenience in altering dates for rate schedules. Date logic improved.
Report Manager	
Reports are updated monthly as bugs are resolved. A new report ZIP file is posted for download/updating in months that changes were made. To keep up to date on what reports have been modified from month to month, please see the online list at http://www.energycap.com/reportupdates .	
Workflow Manager	
#863	Void Bills navigation glitch: Bill lists now permit Voids without losing the focus on that spot in the list. This saves time processing multiple bills in long lists.
#825	Split Bills Logic Improvement: When the Quick Check audit is enabled for a bill, the audit is now run PRIOR to running the bill split processor. The revised process enables error checking and bill edits prior to splitting the bill.
Miscellaneous	
#807	Bill Import: Fixed problem with import of information only cost values.
#1107	Budget Import Spreadsheet: Updated in Administrator to include new Account Code column.
#948	User Login: Login window will accommodate 32 characters for username.
#974	Route Manager Enhancement: The Route Manager route reading sequence numbers now mirror the sequence numbers from the Route Manager panel. A Set Date button enables the user to select the default date/time for new readings for all channels.
#1033	Company Name Change: Incidents of Good Steward Software in the software were changed to EnergyCAP, Inc.
#1084	EnergyCAP Display window: Fixed a glitch with display of the EnergyCAP application when user alternates between two monitors and one monitor.
#1076	Information windows in software Install package: Updated company/product name information, EnergyCAP Support contact information.
#192	Route Manager: Fixed error which occurred when a meter was deleted from a route, which resulted in a discrepancy between the Route and the Reading Sequence numbers.
#819	UDF links: Enhanced functionality so that HTML-coded links in User-Defined Fields will work with both HTTP and HTTPS sites.