



EnergyCAP® Enterprise  
Release 6.0.57.46  
4/15/2009

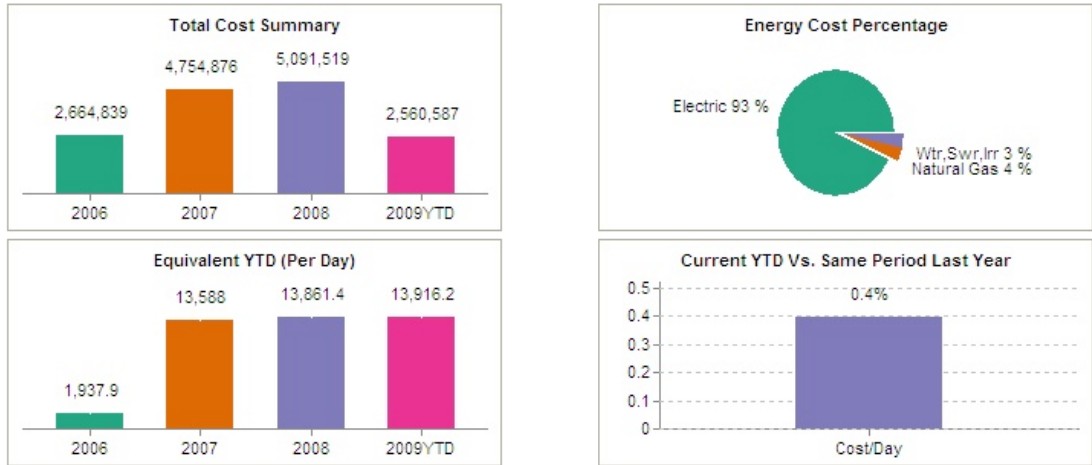
**New Features and Enhancements**

## Major New Features:

- PowerViews have Display Data option—copy/paste data to Excel (p. 1)
  - Automatic Place and Meter Groups (p. 9)
  - New and improved Benchmark charts (p. 10)
  - Nearly instant PowerViews at all levels (p. 2)
- New Report Distribution Manager (automatic emails) (p. 16)
- New and improved Reports (p. 13)
- Faster and improved Greenhouse Gas Charts (p. 8)
- ENERGY STAR updated to v2.1 (p. 7)
- Work Flow Manager enhancements (p. 4)

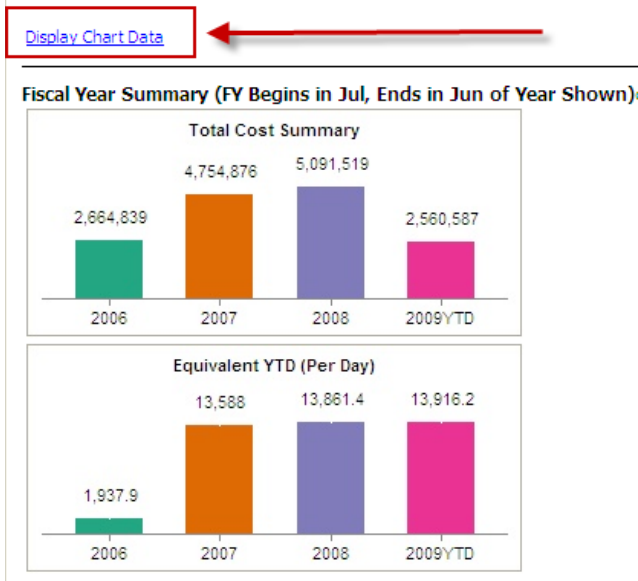
## PowerViews (Account Manager, Group Manager, Facility Manager)

- Chart colors have been changed to comply with standards for the visually impaired

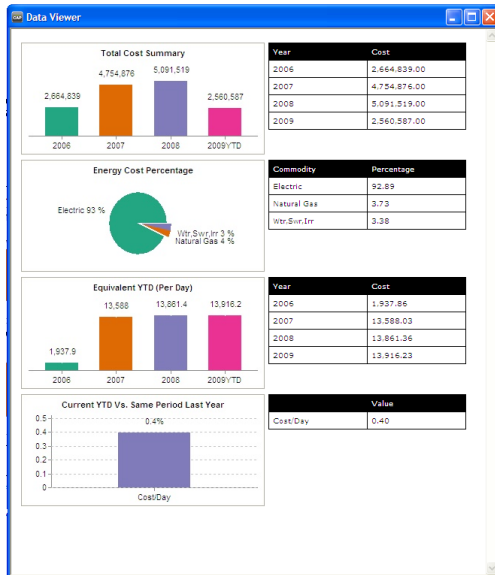


- Charts have a **Display Chart Data** link that brings up the charts in another window. You can then copy/paste directly to Excel or other documents.

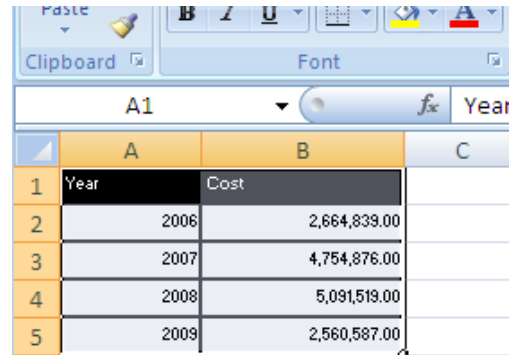
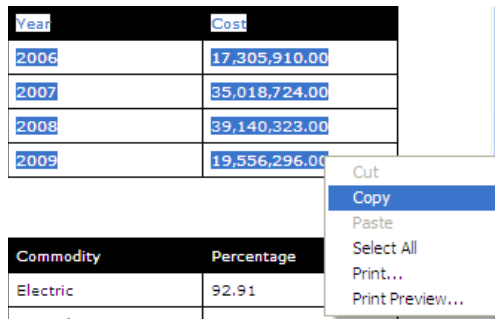
- Click on the link:



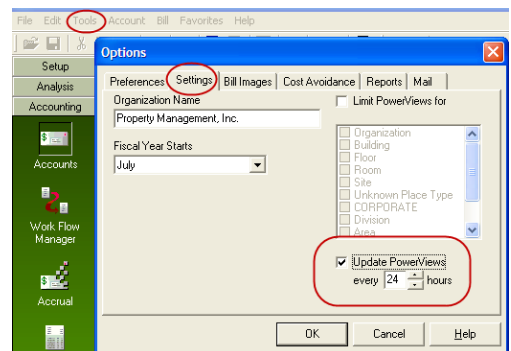
- View the charts and data tables:



- Drag the mouse to highlight (select) the table, right-click **Copy**, then **Paste** to Excel.
- Also right-click to print charts and data tables.



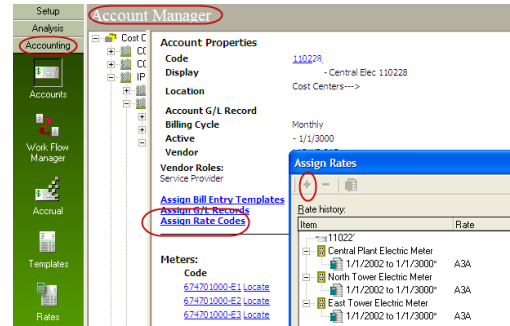
- New staging tables give you nearly instant **PowerViews** charts at all levels of the trees. You no longer need to **Limit PowerViews** at high levels on the tree because PowerViews will display in seconds. Staging tables are database tables that are created at a time and interval convenient for you so that the intense “number-crunching” required to roll-up and summarize thousands, or even millions, of bills is performed just once a day (or up to once a week).



## Accounting Menu

### Account Manager

- Mandatory rate codes—all new meters must have a rate code. This is a powerful tool when used in association with the new **Group Manager** automatic **Vendor-Rate Groups** and benchmarking charts. Existing meters may remain without rate codes, but we highly recommend you assign a rate code to each one to take advantage of this capability.
- The setup spreadsheet (the Excel template used to import multiple new accounts/meters/places at once) has been revised to add two new columns after G/L subcode 20 and before the end-of-record column: (1) **Account Memo** (be sure to exclude commas) and (2) **Meter's Rate Code**. The **Rate Code** column is mandatory.
- An icon is used to display the bill scanned image; likewise an icon is shown in **Facility Manager—Meter Bills**. (Note: EnergyCAP does not verify the presence of an actual scanned bill image file; it only verifies that the link to an image exists. The actual image file may be located on another server that is not accessible when you click the icon, or the link or image name may be incorrect.)
- Clone a bill. Right click on a bill in **Account Manager—Bills** list. A new option lets you “clone” a bill, i.e. create an exact copy of it, which can then be edited as needed. This can be very handy in a number of situations for splits, chargebacks, monthly recurring bills, etc. Note: If **Batches** are enabled, you must have an open batch in order to clone a bill.



Period	Year	Acct Per	Acct Yr	Start Date	End Date
Dec 2008	Jan 2009	Jan 2009	Jan 2009	12/10/2008	1/13/2009
Nov 2008	Dec 2008	Dec 2008	Dec 2008	11/6/2008	12/10/2008
Oct 2008	Nov 2008	Nov 2008	Nov 2008	10/9/2008	11/6/2008
Sep 2008	Oct 2008	Oct 2008	Oct 2008	9/10/2008	10/9/2008
Aug 2008	Sep 2008	Sep 2008	Sep 2008	8/8/2008	9/10/2008
Jul 2008	Aug 2008	Aug 2008	Aug 2008	7/11/2008	8/8/2008
Jun 2008	Jul 2008	Jul 2008	Jul 2008	6/12/2008	7/11/2008
May 2008	Jun 2008	Jun 2008	Jun 2008	5/12/2008	6/12/2008
Apr 2008	May 2008	May 2008	May 2008	4/11/2008	5/12/2008
Mar 2008	Apr 2008	Apr 2008	Apr 2008	3/13/2008	4/11/2008
Feb 2008	Mar 2008	Mar 2008	Mar 2008	2/12/2008	3/13/2008
Jan 2008	Feb 2008	Feb 2008	Feb 2008	1/11/2008	2/12/2008
Dec 2007	Jan 2008	Jan 2008	Jan 2008	12/10/2007	1/11/2008
Nov 2007	Dec 2007	Dec 2007	Dec 2007	11/7/2007	12/10/2007
Oct 2007	Nov 2007	Nov 2007	Nov 2007	10/10/2007	11/7/2007
Sep 2007	Oct 2007	Oct 2007	Oct 2007	9/11/2007	10/10/2007
Aug 2007	Sep 2007	Sep 2007	Sep 2007	8/15/2007	9/11/2007

Period	Year	Acct Per	Acct Yr	Start Date	End Date	Amount
Dec 2008	Jan 2009	Jan 2009	Jan 2009	12/10/2008	1/13/2009	\$2
Nov 2008	Dec 2008	Dec 2008	Dec 2008	11/6/2008	12/10/2008	\$3
Oct 2008	Nov 2008	Nov 2008	Nov 2008	11/6/2008	11/6/2008	\$
Sep 2008	Oct 2008	Oct 2008	Oct 2008	10/9/2008	10/9/2008	\$
Aug 2008	Sep 2008	Sep 2008	Sep 2008	9/10/2008	9/10/2008	\$
Jul 2008	Aug 2008	Aug 2008	Aug 2008	8/8/2008	8/8/2008	\$
Jun 2008	Jul 2008	Jul 2008	Jul 2008	7/11/2008	7/11/2008	\$
May 2008	Jun 2008	Jun 2008	Jun 2008	6/12/2008	6/12/2008	\$
Apr 2008	May 2008	May 2008	May 2008	5/12/2008	5/12/2008	\$E
Mar 2008	Apr 2008	Apr 2008	Apr 2008	4/11/2008	4/11/2008	\$1
Feb 2008	Mar 2008	Mar 2008	Mar 2008	3/13/2008	3/13/2008	\$1
Jan 2008	Feb 2008	Feb 2008	Feb 2008	2/12/2008	2/12/2008	\$2
Dec 2007	Jan 2008	Jan 2008	Jan 2008	1/11/2008	1/11/2008	\$1
Nov 2007	Dec 2007	Dec 2007	Dec 2007	12/10/2007	12/10/2007	\$4
Oct 2007	Nov 2007	Nov 2007	Nov 2007	11/7/2007	11/7/2007	\$
Sep 2007	Oct 2007	Oct 2007	Oct 2007	10/10/2007	10/10/2007	\$
Aug 2007	Sep 2007	Sep 2007	Sep 2007	9/11/2007	9/11/2007	\$

## Rate Manager

- New **“Copy As”** option lets you easily create a new rate from an existing rate version. A new rate code and vendor must be entered.

## Template Manager

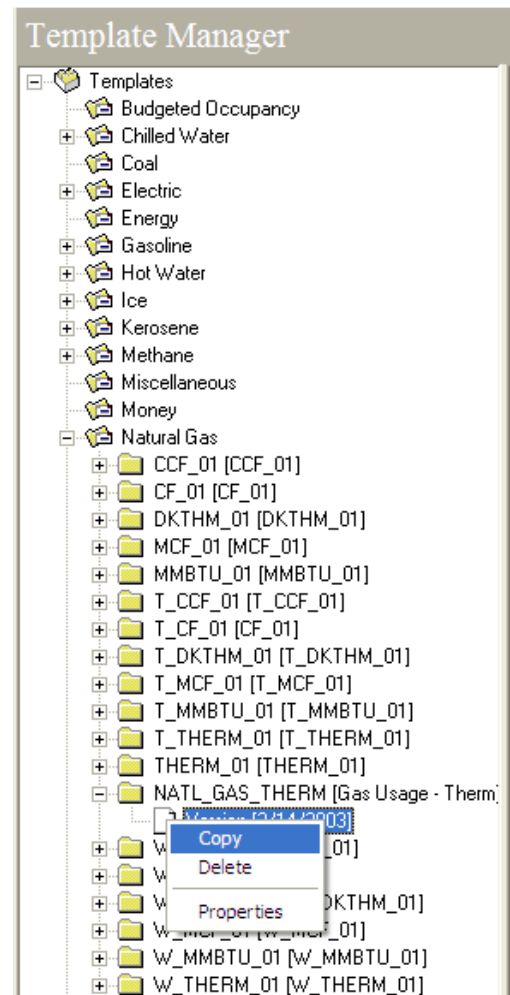
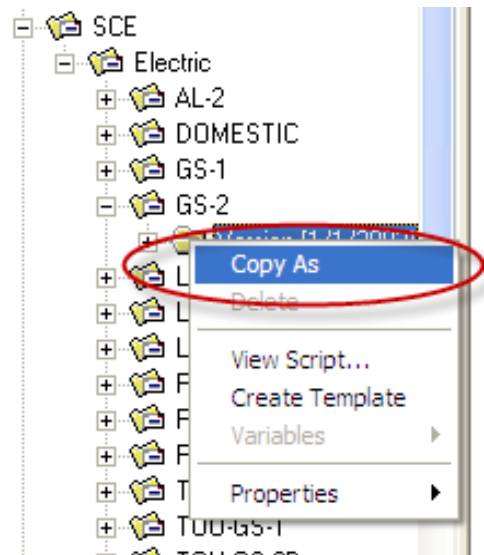
- New **“Copy”** option lets you easily create a new template from an existing template. A new template code must be entered.

## Accrual Manager

- Accrual processor now properly handles accounts when both accrued data and actual data exist for the same days.

## Work Flow Manager

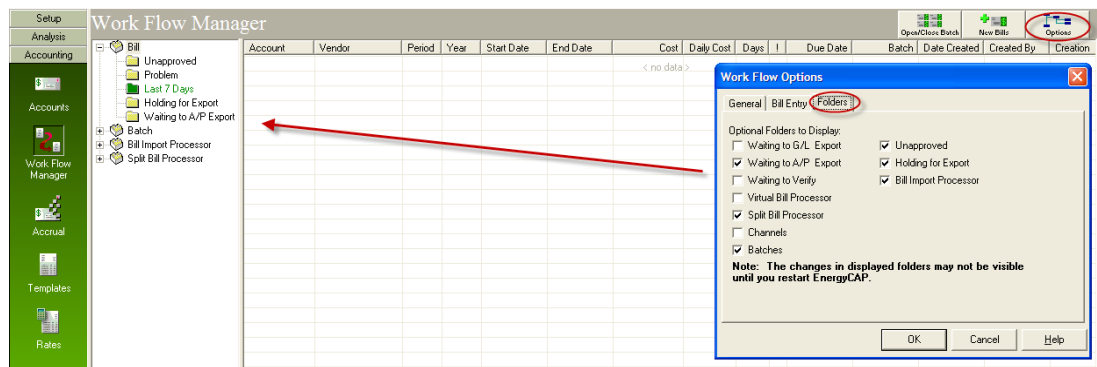
- The bill entry screen includes these improvements:
  - The billing period default attempts to avoid two bills in the same month. When a new bill is being keyed or imported, it follows this logic to set the billing period:
    - Normally, the billing period is set to the month that the middle day in the billing period range falls in. A bill with dates April 15–May 17, for example, has its middle day on May 1, so it defaults to a May billing period. A bill with dates May 17–June 14 has its middle day on May 31, so it also defaults to a May billing period.
    - Using the new logic, the first bill would have defaulted back to April if there was no bill already assigned to April. The “move back” conditions are: 1) No bill in the prior month, 2) Start date falls in the prior month, 3) Bill < 45 days in length, and 4) Middle day falls on May 5 or earlier. By moving back to April, this



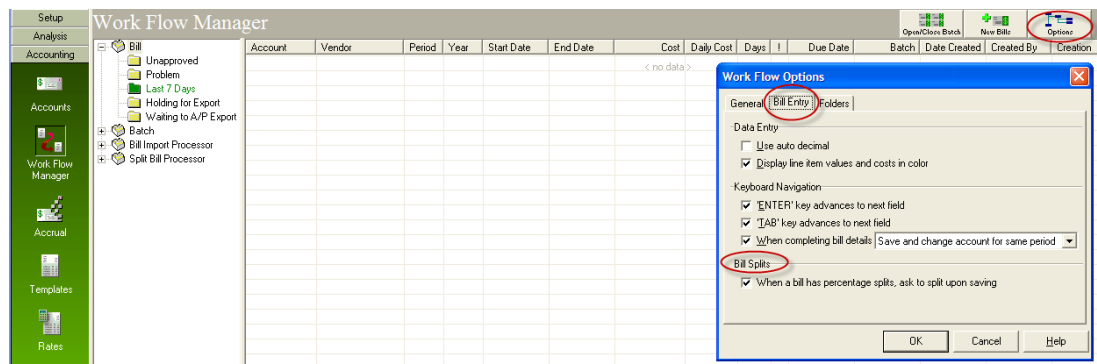
will prevent a situation where there are no bills in April and two bills in May.

- Similarly, a bill ending late in a month will move forward to the next billing period when: 1) There is no bill already in that billing period, 2) The bill ends in that month, 3) The middle day falls on the 25th day or later, and 4) The bill length is < 45 days.

- **Account Memo** cannot be edited when in **View Mode**.
- **Bill Messages**—edit and save functions enhanced for better usability.
- **Statement** and **Due Date** fields no longer have a checkbox; this simplifies date entry and allows better use of arrow keys to move from day > month > year.
- New option per user to hide or show **Work Flow** folders; allows you to hide folders that you don't use.



- New option per user allows you to disable the **Split Bill Now?** pop-up question after keying a bill that has percentage splits. When the pop-up message is disabled, you must split the bill later using the **Split Processor**.



- Bill flat file (Excel) import includes these improvements:
  - Optional **VendorCode**, useful for large organizations wherein two vendors coincidentally use the same account code.
  - Disallows import of a bill when the bill start date is later than the account service end date.
  - Disallows import of a bill to an inactive account.
  - Optional import of **Account Period**.
  - The automated import task (IMPTSK) can now be used on an Internet connection via the “rich client.”
  - Optional captions are not converted to uppercase if shown in the import file as lowercase.
  - **Pay Amount** column is ignored—**Pay Amount** is set as the sum of the cost columns. This avoids “unbalanced” bills due to user errors in import files.
  - Several other internal improvements to eliminate incorrect data scenarios. See **Online Help**.
- **Due Date** column added to bill lists; helpful when you need to prioritize the approval or investigation of bills.

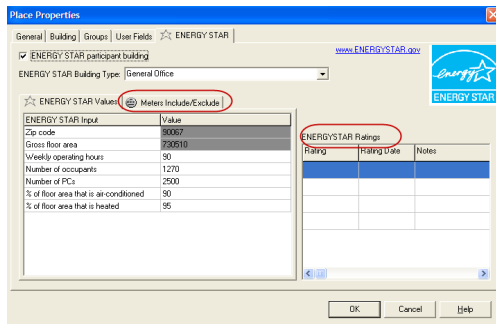
Work Flow Manager													
Bill	Acc...	Ve...	Period	Year	Start Date	End Date	Cost	Daily Cost	Days	!	Due Date	Batch	Date Created
Unapproved	05813...	Th...	Dec	2008	12/15/2008	1/15/2009	\$2,434.98	\$78.55	31	4	2/9/2009	P-SA...	1/23/2009
Problem	15857...	Th...	Dec	2008	12/12/2008	1/15/2009	\$3,527.25	\$103.74	34	4	2/9/2009	P-SA...	1/23/2009
Last 7 Days	19639...	Th...	Dec	2008	12/12/2008	1/15/2009	\$13.13	\$0.39	34	4	2/9/2009	P-SA...	1/23/2009
Holding for Export	17117...	Th...	Dec	2008	12/12/2008	1/15/2009	\$1,135.58	\$33.40	34	4	2/9/2009	P-SA...	1/23/2009
Waiting to A/P Export	17105...	Th...	Dec	2008	12/12/2008	1/15/2009	\$1,950.70	\$57.51	34	4	2/9/2009	P-SA...	1/23/2009

- Bill flat file importer allows you to select multiple files at once. This is particularly helpful for users of **Xebec EDI** file import, an automatic bill import service that eliminates manual entry of bills when your vendors offer electronic billing options.
- If you previously used the **Bill Approval** mode (set from the **Work Flow Wizard**) when you edited and saved an existing bill, the approved flag was automatically set to unapproved so that all edited bills had to be re-approved. Now, upon saving an approved edited bill, you have the option via a pop-up message to set the flag to unapproved or leave it approved.
- You can now approve bills from the **Problem** folder. This is helpful in certain work flow cases.

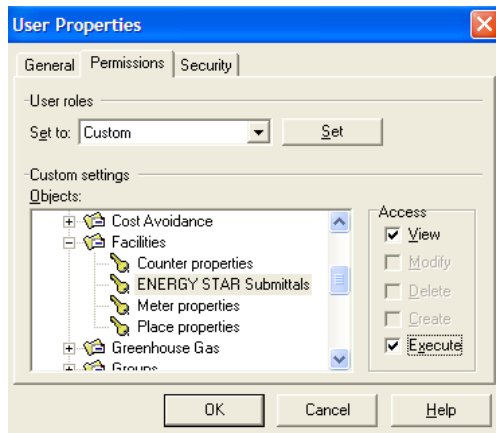
## Setup Menu

### Facility Manager

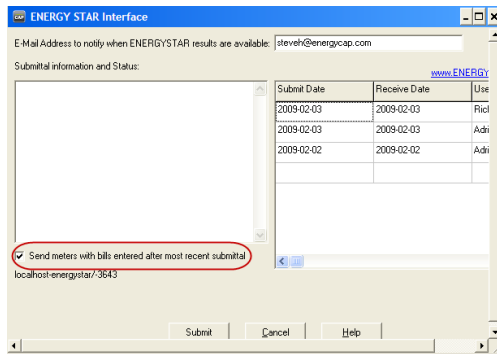
- ENERGY STAR updates:
  - Updated to what U.S. EPA ENERGY STAR calls Automated Benchmarking System 2.1. This is the latest version of ENERGY STAR and includes new building types and new building attributes.
  - Added a tab that allows you to exclude selected meters from ENERGY STAR submittal. For example, you may have outside lighting meters that are attached to the building in EnergyCAP but not relevant to the ENERGY STAR submittal.
  - Ratings history is shown as well as messages returned from the submittal process.



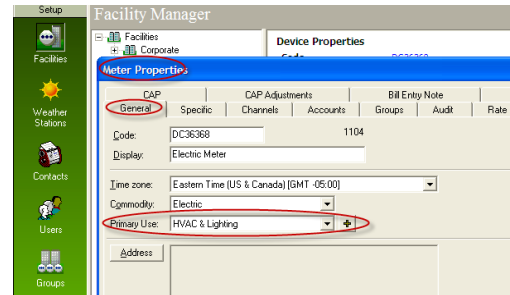
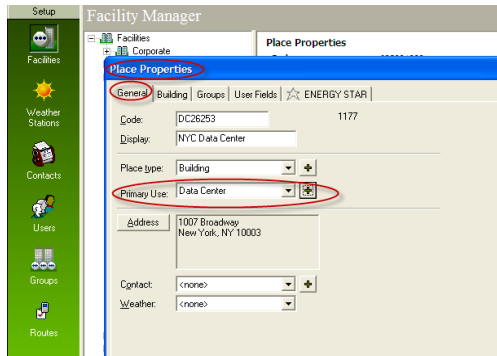
- **New User** permission added for ENERGY STAR submittals—allows you to control who has ENERGY STAR submittal rights. (Defaults to no execute permission for all users.)



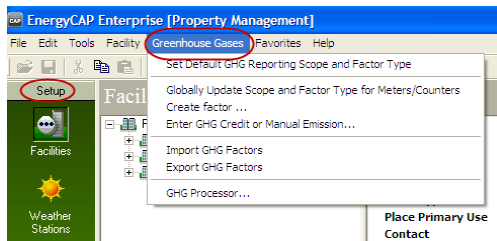
- Submittal of data to ENERGY STAR allows you to resubmit just those buildings that have new data (entered after your last submittal).



- **Building and Meter Primary Use** field (optional). Create your own list of building and meter primary uses, assign one to each building and meter, and then **Place** and **Meter** Groups will be created and maintained for you automatically. (See the description of **Auto-Groups** under **Group Manager**.)

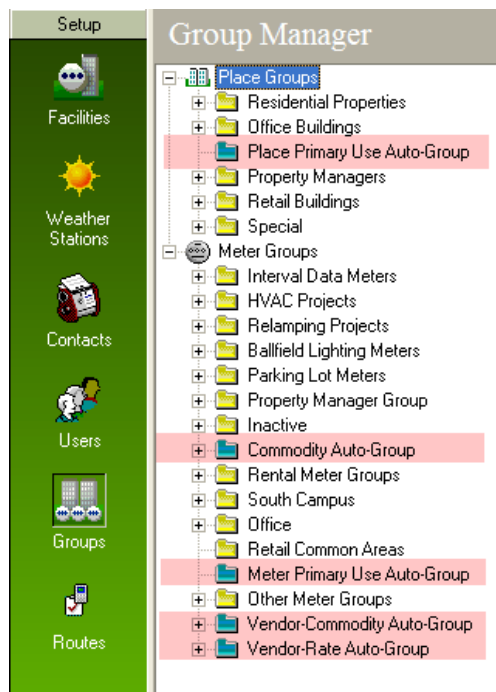


- Greenhouse Gas features has been revised for improved ease-of-use and significantly faster updates. Please consult the **Online Help** for detailed instructions.

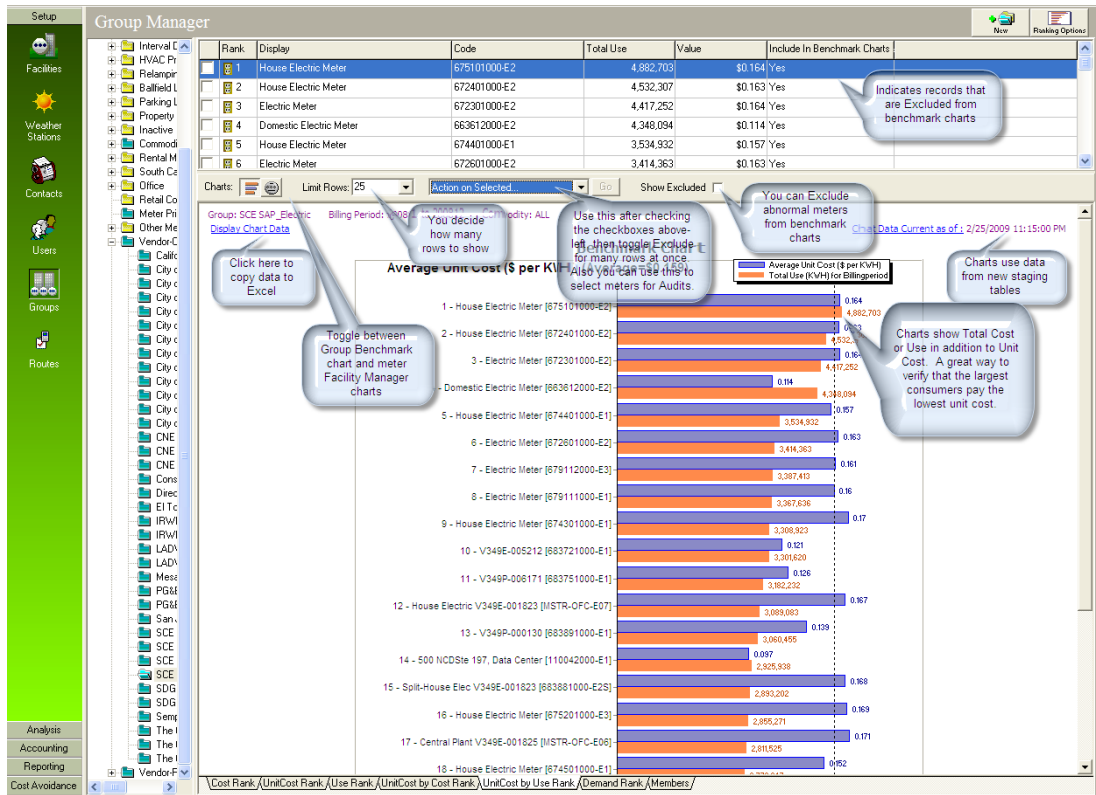


## Group Manager

- The **Group Manager** has been redesigned and upgraded in several powerful ways:
  - New **Auto-Group** feature. EnergyCAP automatically creates and maintains these five groups (shown in blue in the tree):
    - **Place Primary Use** (based on the new **Place Primary Use** field)
    - **Meter Primary Use** (based on the new **Meter Primary Use** Field)
    - **Commodity** (one group per meter commodity—this may be a large group if you have many meters)
    - **Vendor-Commodity** (one group per commodity per vendor)
    - **Vendor-Rate** (one group per rate per vendor)

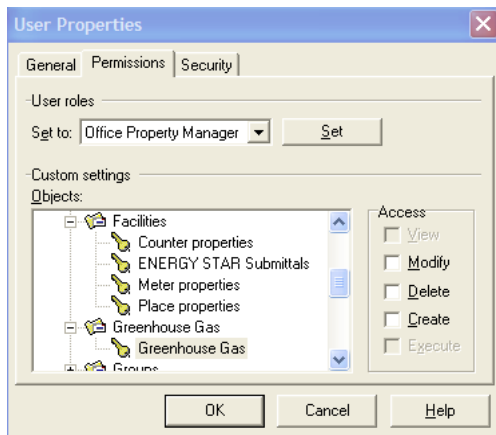


- New **Group Manager** design has valuable functions as shown below:



## User Manager

- Added new permissions for ENERGY STAR submittals and Greenhouse Gas. Existing users default to no permission.



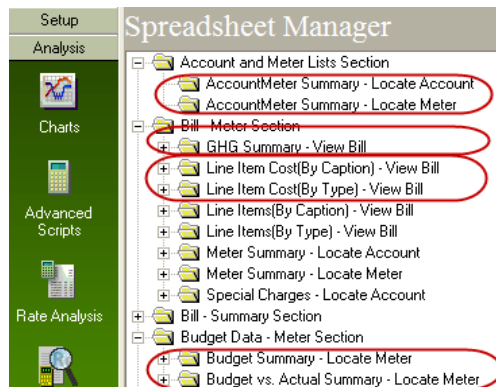
## Analysis Menu

### Charts

- No changes in release 6.0

### Custom Spreadsheets

- New spreadsheet format options; new filters for topmost and groups.
  - **Greenhouse Gas** spreadsheet
  - **Budget** spreadsheet “Master” budgets only)
  - Lists of accounts and meters



### Audit Manager

- **Audit 47** (duplicate control code) has been fixed. Audit processor now correctly uses account and meter override values.

### Budget Manager

- Added **Rate Code** filter to budget modification screen.

### Advanced Scripts and Rate Analysis

- **Meter Properties—Rate Details** now properly appear in **Rate Manager—Meter Details**.

## Cost Avoidance Menu

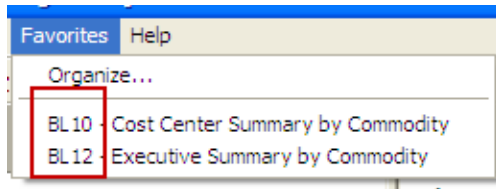
### Cost Avoidance Manager; Issue Tracker

- No changes in release 6.0.

## Reporting Menu

### Report Manager

- **Report Code** added to **Favorites**—easier to identify reports. (If you haven't tried **Report Favorites**, give it a try. It's a great time saver—just right-click on a report name in the **Report Manager** and then click **Add to Favorites**)



- **Report** filters are now in alphabetical order for easier use.
- New Reports (Including release 5.1, which some users have not yet installed):
  - **AN24, AN24A.** Reports on ENERGY STAR ratings
  - **SU58. Weather Station Assignments.** Identifies which places are assigned to which weather stations. Also identifies unassigned places.
- Improved Reports (Including release 5.1, which some users have not yet installed):
  - **AN04.** The table was not showing April.
  - **AN05, AN07.** These were reporting in proportional cost, which was inconsistent with the other reports and **PowerViews**. This has been changed to direct cost, which makes them consistent with other reports and **PowerViews**.
  - **AN05, AN07.** No longer ignore supplier cost.
  - **AN10A.** A “Boolean is required here” error on Web report was fixed.
  - **AN12.** The report code in the header was being truncated.
  - **AN15, AN16.** Buildings are no longer duplicated.
  - **BL01.** Added number of days to meter totals; added usage unit to each detail line.
  - **BL01A.** Report was displaying usage in common units, but unit cost and use per day in native units.
  - **BL02.** Added place group filters; fixed meter, place, and grand totals.

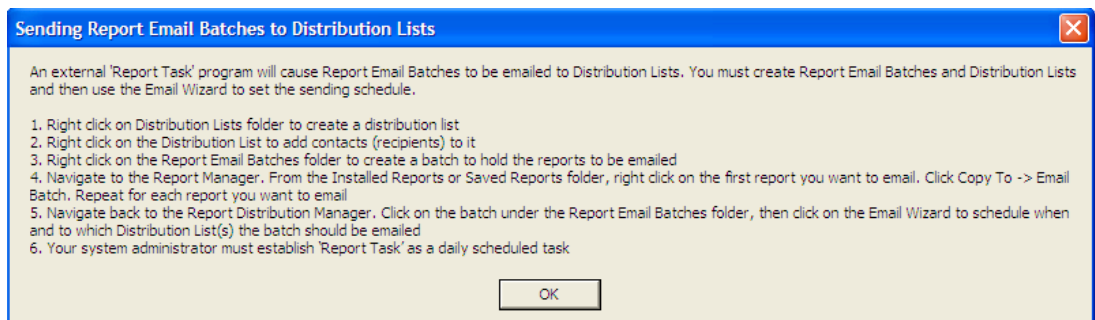
- **BL02CC, BL03, BL04, BL10, BL11, BL13.** These were reporting in proportional cost, which was inconsistent with the other reports and **PowerViews**. This has been changed to direct cost, which makes them consistent with other reports and **PowerViews**.
- **BL03.** Report would not run; this has been fixed.
- **BL05, BL06, BL07, BL16, BL20, BL23, BL23A, BL27.** Changed **Batch Number** filter label to **Batch Code**.
- **BL07.** Report now runs in Web mode.
- **BL08.** Report was showing bills that weren't missing when filtered by topmost place; this has been fixed.
- **BL15.** **Vendor Code** filter was not displaying a dropdown list of vendors; this has been fixed. **Total Cost** filter has been clarified to mean **Meter Cost** (which may only be a part of the **Pay Amount** of the bill)
- **BL16.** When a bill has more than one line of the same line item, it will be properly reported multiple times (e.g. two 'late fee' line items).
- **BL23, BL23A.** Added missing **Bill Import Verified** filter.
- **BL30.** Changed filter label from **Num of Months** to **Num of Months (1-12)** to make it consistent with other filters.
- **BL31, BL32.** Changed filter label from **Account** to **Account Code** to make it consistent with other filters.
- **BL33.** Report grand total is now correct.
- **BL34.** Some accounts were not appearing (accounts with more than three BAM records with the same end date for one account).
- **BL35.** Billing period filter setting had been displayed improperly in the report footer filter display; this has been fixed.
- **BL37.** Added a secondary detail level sort by billing period descending, which makes it easier to find bills on the report.
- **BL38.** Added status filters, a fix for supplier accounts that were previously ignored.
- **BT01–BT04.** The meter group filter was causing the report to fail with a blue screen; this has been fixed.
- **BT05.** Ordered months by fiscal year instead of calendar year.
- **BT08.** The meter group filter was causing the report to fail with a blue screen; this has been fixed.
- **CH05.** Report was failing in Web mode; this has been fixed.

- **CH08.** Changed filter label from **Channel** to **Channel Code**.
- **CAP01C.** Report was showing incorrect data when **Topmost Cost Center** filter was set.
- **CAP01C.** Fixed division-by-zero error.
- **CAP01E.** Demand was not summing correctly when run for a range of billing periods; report was showing incorrect data when **Topmost Cost Center** filter was set.
- **CAP01E.** Removed extraneous gray lines.
- **CAP07.** Report previously failed with a blue screen. Changed **Cost Center** filter label to **Cost Center Code**. Added missing header to report.
- **CAP13.** Report previously failed with a blue screen due to a corrupted sub report; this has been fixed.
- **CAP14.** Changed filter label from **Assigned To** to **Issue Assigned To**. Report previously failed in Web mode; this has been fixed.
- **CH05.** Report had previously failed in Web mode; this has been fixed.
- **SU01, SU01A, SU03, SU33, SU34.** **Topmost Place Code and Name** and **Topmost Cost Center Code and Name** filters added.
- **SU02.** Added filters for **Cost Center Code and Name, Topmost Cost Center Code and Name,** and **Vendor Code and Name**.
- **SU04, SU05, SU10.** **Topmost Place Code and Name** filters added.
- **SU28.** Fixed typo in **Template Code** filter label.
- **SU31.** Changed filter label from **Channel Unit** to **Channel Unit Name**.
- **SU34.** Meter no longer appears multiple times when it is a member of multiple meter groups.
- **SU37.** Fix for place showing multiple times in group.
- **SU38.** Fixed typo in **Cost Center Name** filter label.
- **SU52.** Added **Bill Account is Active** and **Bill End Date** filters so that the report will list all accounts that have no bills ending after a specified end date. This allows you to spot accounts that were once active but have since gone dark yet are still coded as active.
- **WTHR01.** Report was failing when the **Weather Station** filter was set; this has been fixed.
- **WTHR02.** Fixed issue of the degree day percentage totals for each station calculating incorrectly.

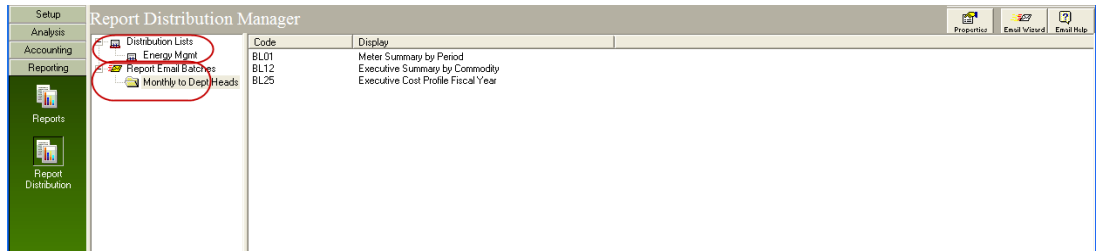
- **YY01, YY02, YY03, YY05, YY06.**  
Changed filter label from **Num of Months** to **Num of Months (1-12)** to be consistent with other reports.
- **YY08.** Changed filter label from **Place Group** to **Place Group Code**.
- **YY10, YY11, YY12, YY13.**  
Changed filter label from **Place Area** to **Floor Area** to be consistent with other reports.
- **YY13.** Percent change filter corrected.
- **AN04, AN04A, AN06A, AN20, AN21, AN22, BL25, BL26, BL28, BL30, BL33, BL33A, BL34, BT01–BT08, CAP07, CAP13, CH05, SU43, SU44, SU45, SU52, YY01–YY15.** Fix for reports not honoring a user's security settings (topmost settings).

## Report Distribution Manager

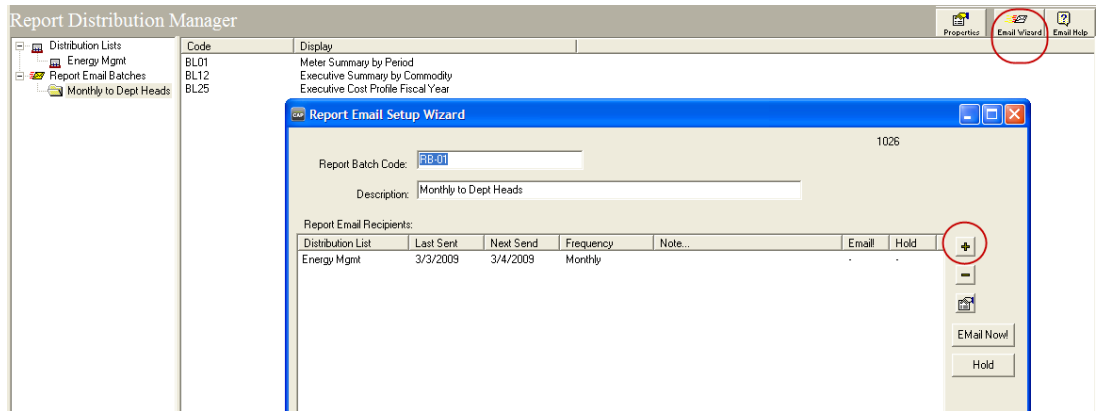
- A great way to keep everyone up-to-date with the latest energy reports via email, this new EnergyCAP feature enables you to:
  - Create any number of **Distribution Lists**.
  - Create any number of **Report Email Batches**. (A report batch is simply a group of one or more reports that are produced together.)
  - Schedule **Distribution Lists** to receive report batches at any frequency. You can define any standard report filters. Filters for month range and topmost filters are automatically set when the reports are produced. This lets you send the same reports to a group of recipients while controlling which buildings, accounts, and meters are included in each individual's reports.
  - Update **Distribution Lists** via import of a simple text file (CSV format).



- Use the redesigned **Report Distribution Manager** to create **Distribution Lists** and **Report Email Batches**.



- Use the **Email Wizard** to relate the **Distribution List** to the **Report Batch**, i.e. set the frequency, forwarding message, etc.



## Administrator Program

- No changes in release 6.0.