

EnergyCAP Enterprise Quick Start Guide

Release 6.1

This Quick Start Guide, in conjunction with training and implementation support, is designed to help you get EnergyCAP up and running fast. EnergyCAP is an advanced, complex program with many options; this Guide does not cover all scenarios or address all options, but rather is intended to assist with the basics of the initial setup leading up to bill entry.

There are eight areas in this Guide where we recommend that you first create “Business Rules” for items such as user permissions and a building code numbering scheme. Establishing and documenting these Business Rules (the Appendix has a convenient form you can use) will lead to a better organized and more orderly database, and will vastly improve the efficiency and accuracy of future system operations.

1. Set up Users. First, create logins for the initial system users.

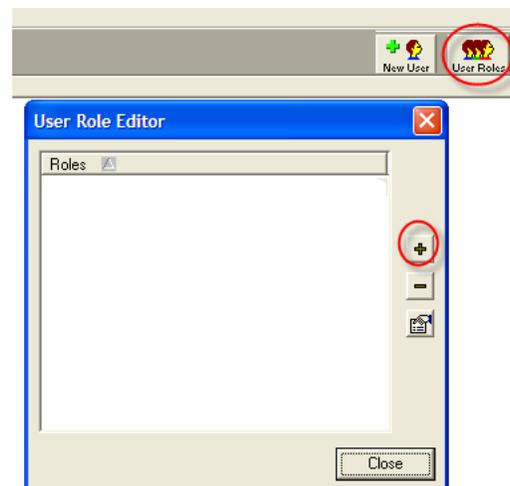
- a. Log into EnergyCAP for the first time as user=**SYSTEM** and password=**SYSTEM**. The SYSTEM login is a special system function that only allows you to access the User menu to create new users. Navigate to **Setup – Users**. (After you create a few new users, we recommend that you change the password for SYSTEM to protect it against future unauthorized use.)
- b. It is advisable to immediately create an *Administrator User Role*. A User Role is a template that enables you to assign the same permissions to many new users at once.



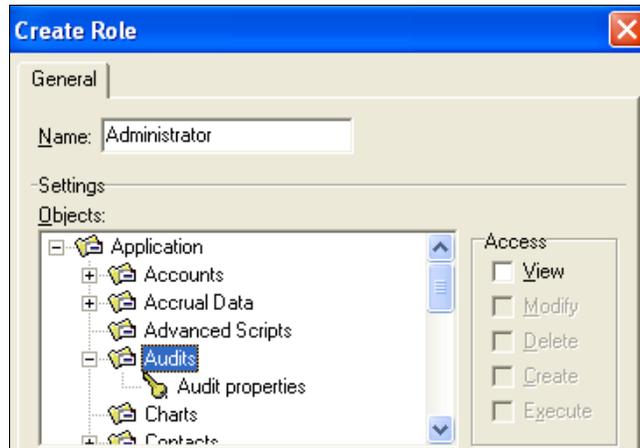
Business Rule #1: Make a list of the various User Roles you’ll need (for example: Administrator, View Only, Bill Entry, Energy Analyst, Budget Analyst, Facility Manager, District Manager, etc.), and decide what general access levels and rights each will need using the User Permissions Worksheet, page 13.

1. From the **Setup** menu bar, click **Users**.
2. Click the **User Roles** shortcut button (upper right).
3. Click “+” to add a new User Role.
4. Input a User Role name (“Administrator” in this example) and click **Select All** to give this role full access rights). Then click **OK** to save.

As you learn more about EnergyCAP and decide which users need what levels of access rights, you can create new roles and use the Application tree view (shown below) to set specific rights for each role.



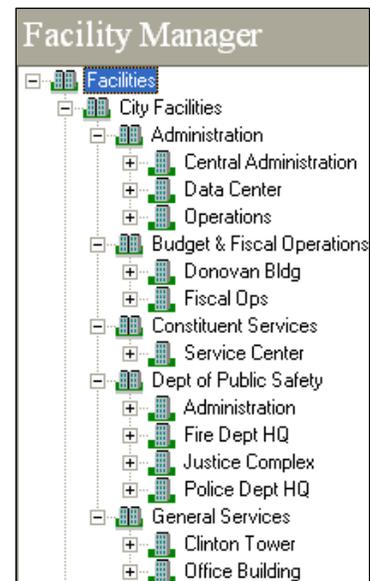
Use the convenient User Permissions Worksheet at the end of this document as a guide in creating various User Roles.



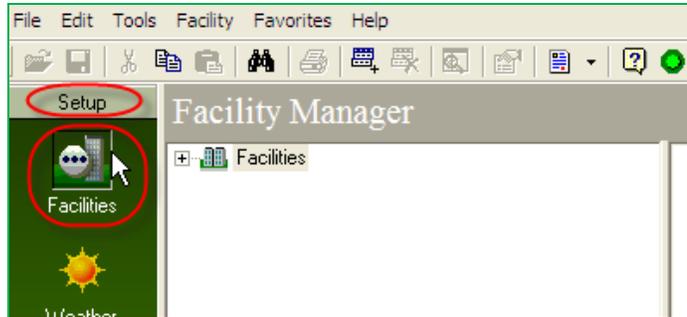
2. **Create the Facility Manager Tree view.** A good next step is to create the organizational structure, which will characterize the actual buildings as well as organizational levels comprising your organization (divisions, departments, regions, districts, etc.).

Business Rule #2: Create a numbering/naming scheme for building codes and display names. Example for a retail chain: Building code = store name, 4 digits, with leading zeros. Store 985=code “0985”. Building display = building code plus city, state. Example: “0985, Seattle, WA” (Note: We repeated the building code within the display name field because some reports and lists use just the display field.)

IMPORTANT: EnergyCAP has an optional spreadsheet-based setup process whereby you can enter the basic setup information for meters, accounts, places and vendors in an Excel spreadsheet and **then import the spreadsheet into EnergyCAP**. The import process is recommended when (1) you have many records to create at once (generally at least 100 accounts) and (2) you are ready to set up everything at once – all account, meter, building and vendor data are available, you have developed coding and naming schemes as described in this Guide, and you can quickly create the spreadsheet. If this is your situation, complete a support ticket at <http://support.energycap.com> to request the spreadsheet template and instructions. If you’re not ready to take this large of a first step, then we recommend you proceed with step-by-step setup as explained below:



- a. Go to the **Setup** menu bar, click **Facilities**.



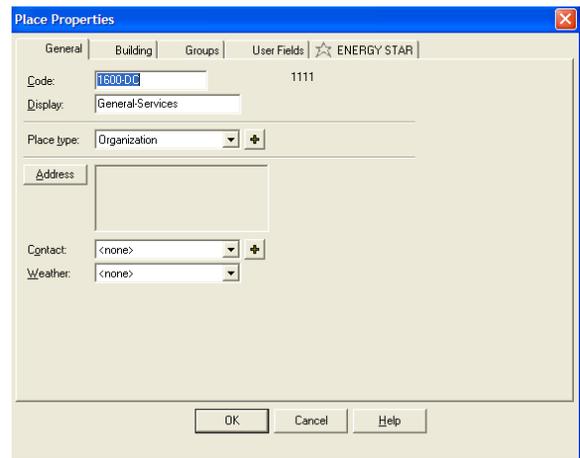
- b. Highlight the “parent” Facilities node, then click the **New Place** button.



NOTE: EnergyCAP uses the generic term “place” to refer to every node on the Facilities tree. That means that a “department” is a place and a “building” is a place.

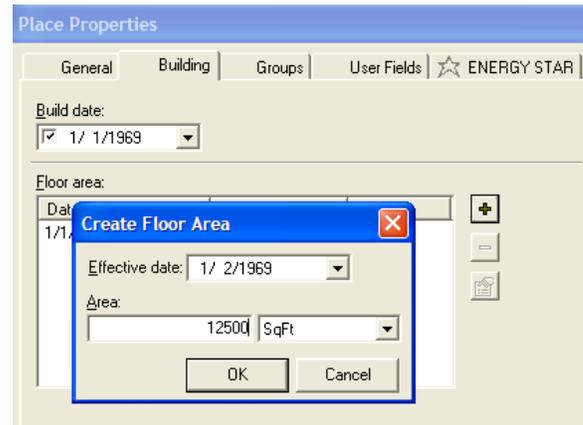
- c. Input the new **Place Code**, **Display Name** and a **Place Type**. You can use the “+” key to create new place types. Start with the upper hierarchy first (divisions, regions, departments, business units, etc.). Avoid hyphens, commas, spaces and special characters in Codes.

Keep adding Places until you have the upper-tier organization structure defined. Note that the structure can be used for defining User access levels (you can allow a user access to one area of the organization but not others) and for filtering report data (you can select certain Places in your organization for focused reporting). Don’t be afraid to make mistakes in the setup process. You can always revise the organization structure later. Note the Facility Manager graphic (right). The “nodes” on the tree view are organizational levels (designated by a “double-building” icon).



- d. After the organizational structure/hierarchy is in place, finish the facility tree by adding buildings under the appropriate organizational levels. Actual buildings or spaces are designated by the “single-building” icon in the Facilities tree. To create a building, highlight the “parent” node then click the **New Place** button.

- e. (optional) You can use the **Building** tab to add building construction date and floor area (used in use and cost per square foot reports.) Each building will have a “single-building” icon. If you have historical utility billing information, accurate records of floor area changes will assist in long-term assessment of energy usage for the facility.

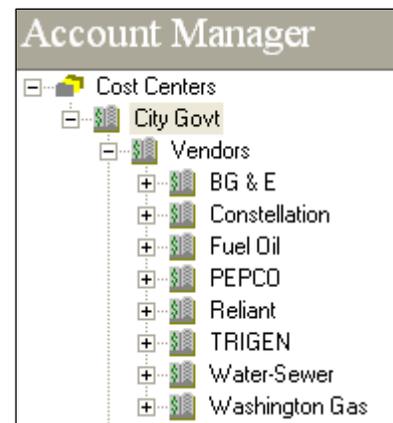


- f. (optional) You can use the ENERGY STAR tab to input preliminary information for inclusion in the national ENERGY STAR ranking program (see http://www.energystar.gov/index.cfm?c=eligibility.bus_portfoliomanager_eligibility#designation for more information).

3. Create Cost Centers in the Account Manager Tree view.

Business Rule #3: Create a numbering/naming scheme for cost center codes and display names.

Cost Centers are the organizational divisions in the accounting tree view. Since accounting procedures don't always follow the same organizational structure as facilities, the Accounting Manager tree view provides a graphical representation of the accounting side of your organization. After you create the Accounting tree view, you will tie the Accounting and Facilities tree views together through their common element—the utility meter (see Account/Meter Setup, below). The utility meter is the tracking device for both COST and CONSUMPTION.



To create a new Cost Center, click **Accounting** from the Navigation Bar, then click the **Accounts** icon. Some users group accounts by vendor rather than on organizational hierarchy (see example, right).

- a. To create a cost center, highlight the *parent* cost center, then click on the New Cost Center button.



- b. Each cost center simply has a code and display name. Cost centers may be nested – one may be under another – so you can create a hierarchy. As with the Facility Manager tree view, each “node” in the Account Manager tree view can be used for user access rights as well as report filtering.
- c. Use Options button to set the preference for the tree view to show code, display name or both. (The Facility tree has a similar setting.)



4. **Create Accounts and Meters.** Once you have the Facility Manager and Account Manager tree views in place, you're ready to use the wizard to create accounts and their associated meters. You'll need a recent copy of a bill for each account.

5.

Business Rule #4: Create a numbering/naming scheme for account codes and display names. The account code should be the same as the code/number assigned by the vendor; the display may be the same, or you may want to use some other naming convention.

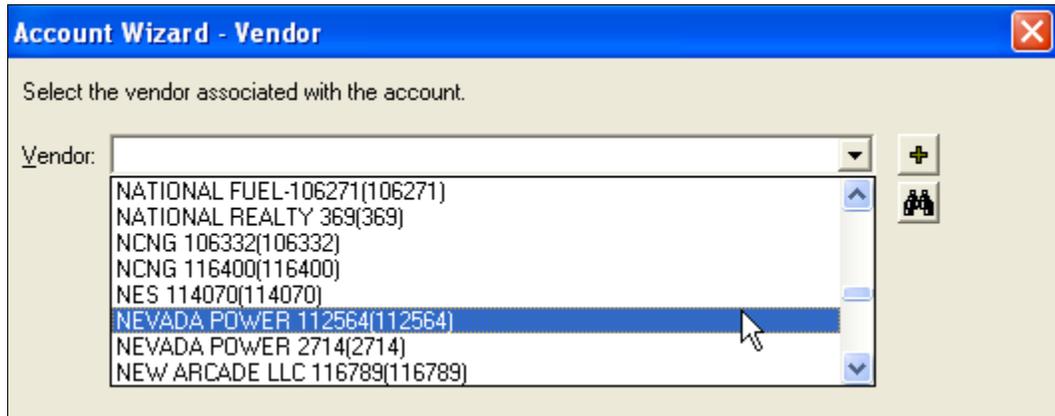
- a. Click on the cost center in which the account will be located, then click the **New Account/Meter** button.



- b. First, enter the Account Code and Display name for the account. Avoid commas, spaces and special characters in Codes. Either or both of these names can be displayed in the tree view depending on user preference (see **Tools/Options-This Manager** from the Main Menu). The Account Code should ordinarily be the account number assigned by the utility vendor, which typically shown prominently on the utility bill. You may use leading zeros and hyphens in the Account Code. It's common to set the display value the same as the code. It's a good idea to click on the **Address** button to enter the complete service address of the account (usually shown on the bill); this information can often help to distinguish between similar accounts.

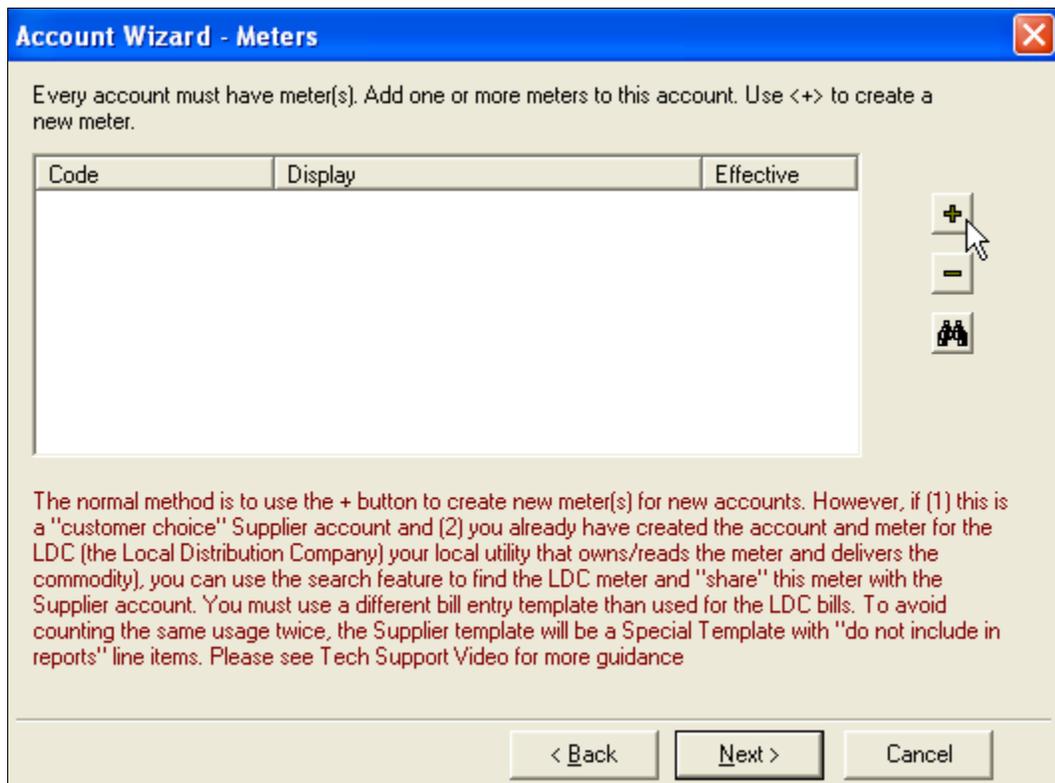
The screenshot shows a software window titled "Account Wizard - General". Inside, there are two text input fields: "Code:" and "Display:", both containing the text "12345ABC". Below these is an "Address" button. An "Address" sub-dialog box is open over the main window, containing several text input fields: "Street:" (111 Sowers St), "City:" (State College), "State/Province:" (PA), "Postal Code:" (16801), and "Country:". At the bottom of the sub-dialog are "OK" and "Cancel" buttons. At the bottom of the main window are "< Back", "Next >", and "Cancel" buttons. A legend at the bottom left of the main window reads: "Account code - The account number a" and "Account display - A descriptive name f".

- c. On the **Vendor** page of the Account Wizard, use the drop down list to select the vendor. If the vendor record has not yet been created, use the "+" key to create a new vendor. When data entry is completed, click **Next**.

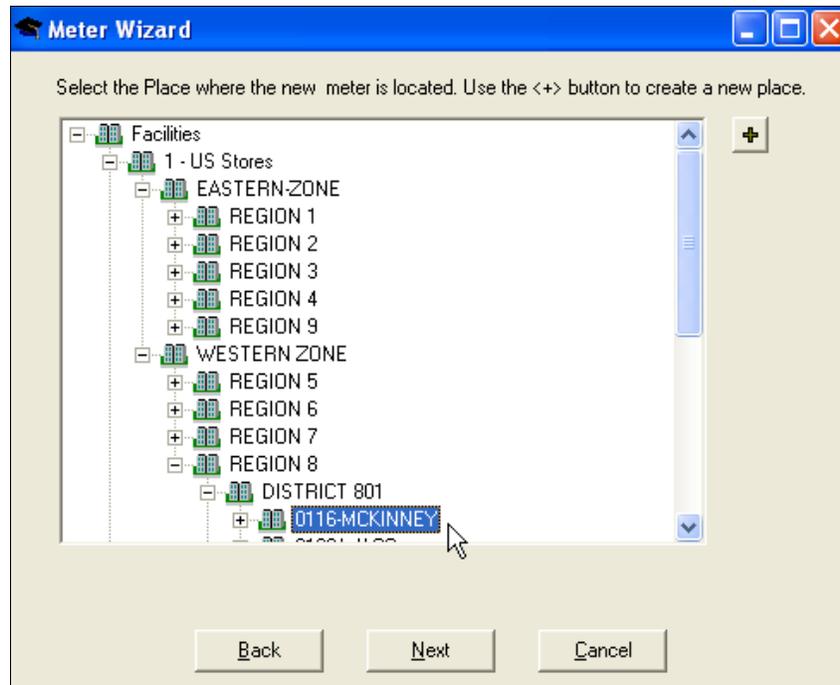


Business Rule #5: Create a numbering/naming scheme for vendor codes and display names. If you are interfacing EnergyCAP with an accounting system, your A/P department will most likely set the vendor codes.

- d. The **Account Wizard-Meters** window enables you to select one or several meters to associate with the account. You must set up a meter for every type of service provided through that account, even if a physical meter does not exist (for sewer or refuse service, for example). To create a new meter, use the “+” button to launch the Meter Setup Wizard.

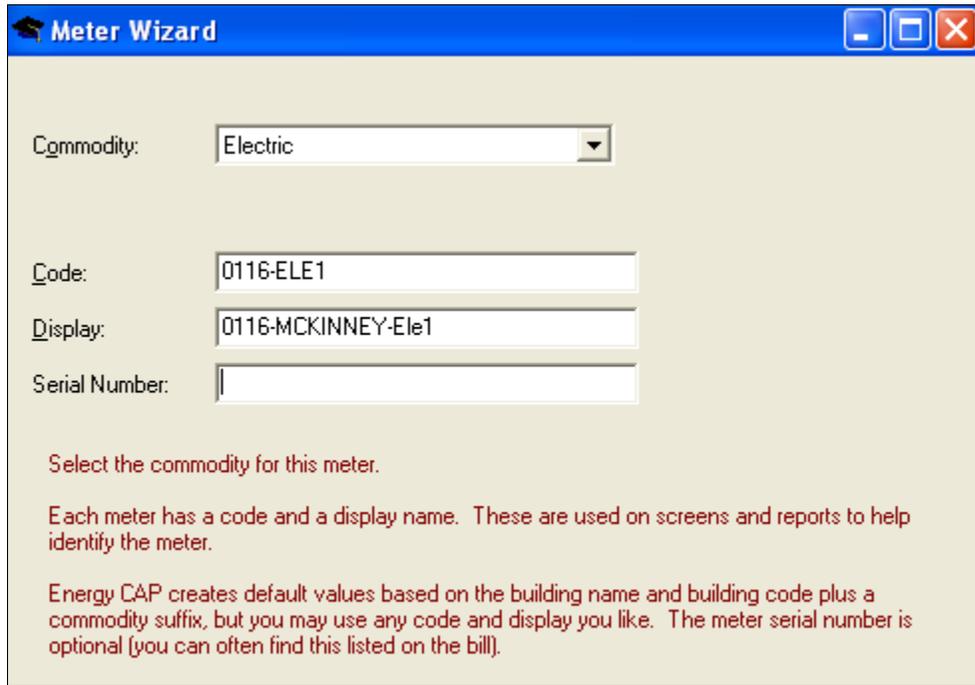


- e. Click the building place in which this meter is located. If the place does not yet exist, you can use the “+” button to create a new building “on the fly.”

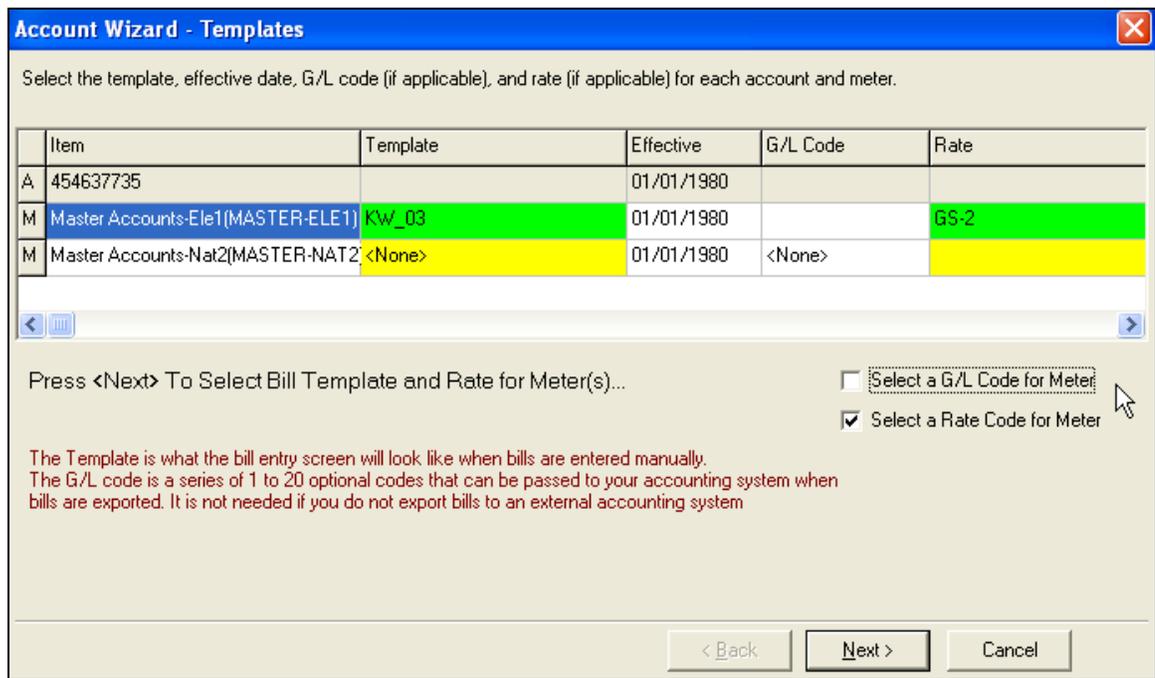


- f. From the **Commodity** window in the Meter Wizard, select the commodity type first, then click inside the meter code field. EnergyCAP will assign a meter code based on the building’s code plus a suffix. You can use your own meter code and meter display name scheme if you like. If the utility bill shows a meter serial number, it’s a good idea to track this for future verification purposes. Click **Finish** when done, then you can use “+” to create another meter (if this bill indicates more than one meter on the account). When data entry is completed, click **Next**.

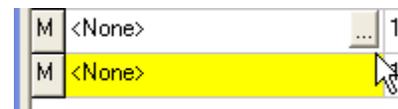
Business Rule #6: Create a numbering/naming scheme for meter codes and display names. Since meters are located in buildings, a naming convention that is linked to the building codes is most common.



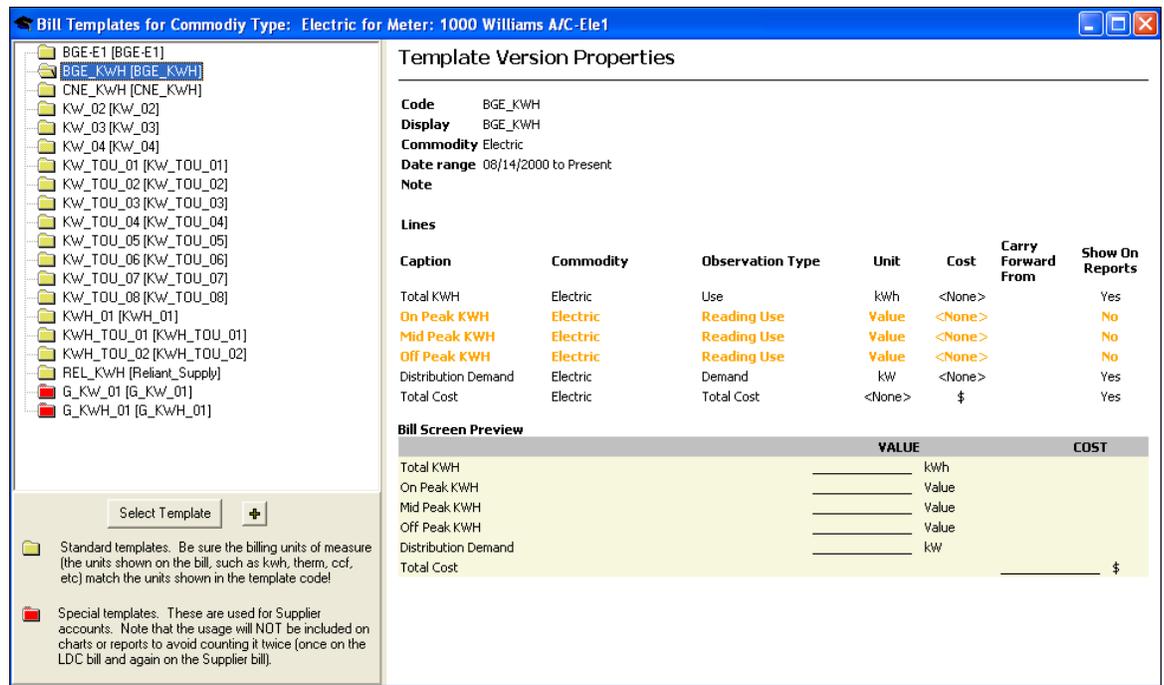
- g. The final page of the Meter Wizard allows you to select Bill Entry templates, G/L Codes, and Rate Codes.



- h. Notice on the left side that there is one **A** (Account) row and at least one **M** (Meter) row. We will only be using the Meter row(s). You should select appropriate information to complete the yellow fields (they will turn green when done or white if not used.) You must assign a Bill Entry template to each meter. To select a **Bill Entry Template**, click the **Next** button to open the **Bill Templates ...** window. (Or you can double-click the yellow field opposite the meter code in the Template column. A browse ... button



will appear. Click the button to open the **Bill Templates ...** window.) Then click on any of the template folders on the left side of the window.



The Bill Template defines the appearance of the bill entry screen – what lines of data will be tracked. When you select a template on the left pane of the Template window, a bill entry preview will be displayed on the right. The red templates are special ones used for the supplier/retailer bills for deregulated (“customer choice”) accounts. It’s *most important* that the template reflect the correct units of measure (that’s why you need a copy of a bill as a guide). Different templates display different common units of measure for the selected commodity. Note that both gas and water accounts are commonly billed in a variety of different units of measure. Make sure that the Unit indicated matches the Unit on your bill.

- i. If the selected template is unsuitable, click another template and repeat the process until you have identified the most appropriate template. If a suitable template is not available in the list of templates for that commodity, click the “+” button to create a new template. Then use the **Create Template** window to create an appropriate template for your bills. When done, click **OK** to close the **Create Template** window. Click the desired template to accept it from the list of available templates. Then click **Select Template** to close the window.

Business Rule #7: Create template assignment rules for each commodity. Select several templates as being the ‘typical’ templates to use for each commodity, based upon the billing units (CCF, Therm, Kwh, etc) and the bill format. If you have complex bills and want to track a high level of detail, you may have to create some new templates first. Click on Help for more guidance from the Support website.

Next, you can assign general ledger expense account codes to each meter *if* you are interfacing with an accounting program. Meters can share the same G/L code record, or each meter can have a unique G/L code record. Each G/L code record can have up to 20 subcodes, each with a unique label and even a drop-down list of choices (note:

labels and drop down choices are managed by the separate Administrator program). Since A/P interface and G/L codes are advanced topics, you will need additional guidance in this area from an EnergyCAP implementation engineer.

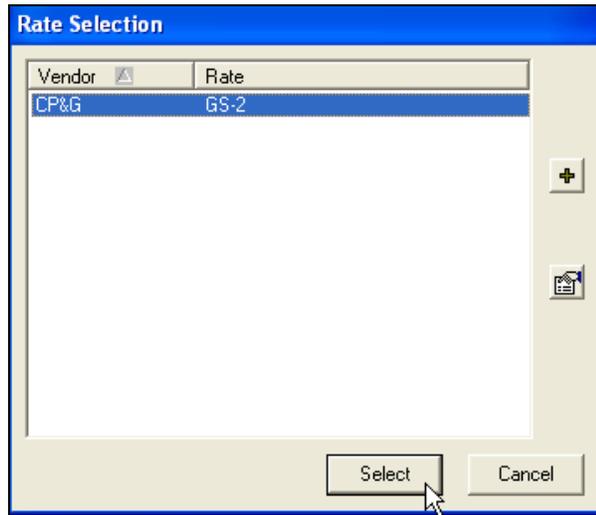
Business Rule #8: Create a numbering/naming scheme for G/L codes, display names, and G/L subcodes (if used). You may give the 1-20 subcodes common name labels.

The 'Create G/L Code' dialog box features a 'General' tab. It contains a 'Code:' text box, a 'Display:' text box, and a 'More >>' button. Below these are two columns of subcode fields, labeled SubCode1 through SubCode10.

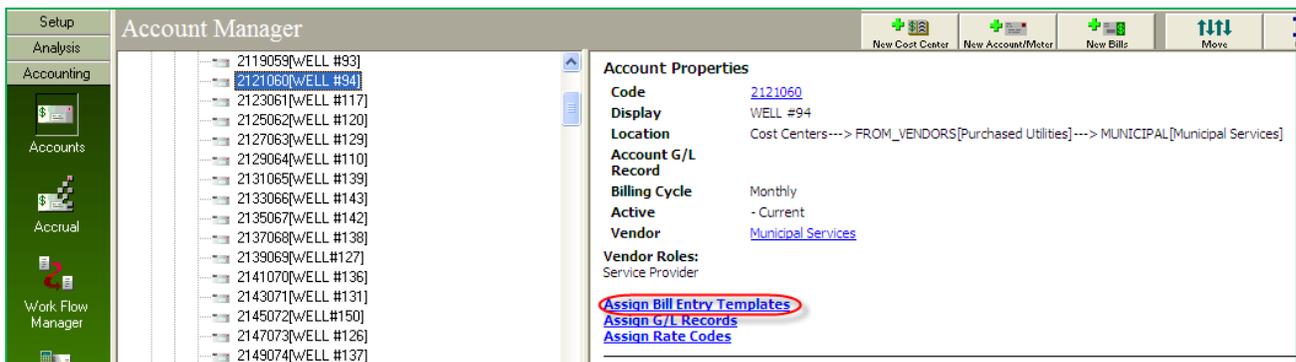
- j. The **Rate Code** designates which tariff a meter is billed on, such as GS, E-1 or TOU. Assigning a rate code to a meter is optional but is highly recommended; grouping meters by rate codes can often help to spot problems and savings opportunities. You can uncheck the **Rate Code** check box if you don't want to assign a rate code at this time. If you want to select a rate code, double click in the Rate Code column. The **Rate Selection** window will open. Click the desired vendor rate code to associate with the account. If the appropriate rate code for this vendor has not yet been created, click + to create a new one. As a minimum, all you have to do is enter the rate in the Name field. You can skip the following Rate Wizard fields if you don't desire to set up the rate's pricing terms at this time. Then click **Select** to close the **Rate Selection** window.

The 'Rate Wizard - General' dialog box includes the following fields: Name (text box with 'GS-2'), Type (dropdown menu with 'Rate'), Vendor (dropdown menu with 'CP&G'), Commodity (dropdown menu with 'Electric'), Effective date (dropdown menu with '1/1/2002'), and a Note (text area). Navigation buttons at the bottom are '< Back', 'Next >', and 'Cancel'.

The 'Rate Wizard - Feature Selection' dialog box contains several checkboxes: 'Seasonal pricing', 'Time of use pricing', and an 'Options' section with 'Customer / Facilities charges', 'Demand charge', 'Commodity charge', and 'Billing period adjustment'. Navigation buttons at the bottom are '< Back', 'Next >', and 'Cancel'.



NOTE: If you need to change the template, G/L or rate code after completing the setup wizard, click on the **Assign ...** hyperlink in the **Account Properties** Power View.



APPENDIX: EnergyCAP Business Rules for Nomenclature

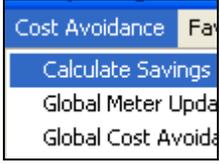
Rule #	Topic	Rules
1	Access Rights per User Role	
2	Place Codes and Display Names	
3	Cost Center Codes and Display Names	
4	Account Codes and Display Names	
5	Vendor Codes and Display Names	
6	Meter Codes and Display Names	
7	Meter Templates per Commodity Type	
8	G/L Codes, Subcodes and Display Names	

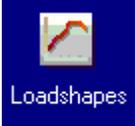
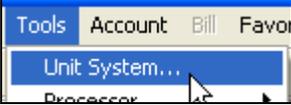
User Permissions Worksheet for Copying

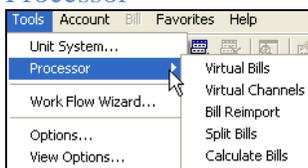
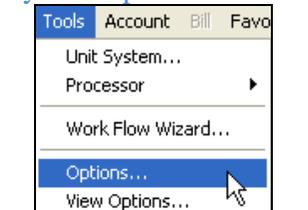
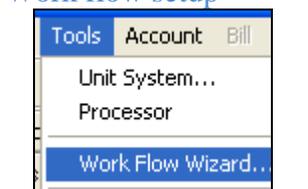
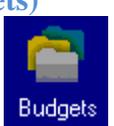
<i>Action Level</i>	<i>Description</i>
View	Users are only able to view information pertaining to a particular area.
Modify	Users are able to view and edit information pertaining to a particular area but are restricted from creating or deleting any data. Users are restricted from executing functions in this area.
Delete	Users are able to view and delete information pertaining to a particular area but are restricted from creating or modifying any data. Users are restricted from executing functions in this area.
Create	Users are able to view and create information pertaining to a particular area but are restricted from modifying or deleting any data. Users are restricted from executing functions in this area.
Execute	Users are able to view information and run functions pertaining to a particular area.

<i>User Manager Options (Setup – Users)</i>	<i>Main Menu in EnergyCAP</i>	<i>Sub Menu in EnergyCAP</i>	<i>Description of Object</i>	<i>Action Levels</i>	<i>Check box</i>
ACCOUNTS  Accounts	Accounting	Accounts	Allows View access to the Account Manager	View	
Account properties	Accounting	Accounts	Allows Modify, Delete, and/or Create access for accounts.	Modify	
				Delete	
				Create	
Bill properties	Accounting	Accounts	Allows Modify, Delete, and/or Create access for bills.	Modify	
				Delete	
				Create	
Cost center properties	Accounting	Accounts	Allows Modify, Delete, and/or Create access for cost centers.	Modify	
				Delete	
				Create	
ACCRUAL  Accrual	Accounting	Accrual	Allows View access to the Accrual Manager	View	
Generate accrual bills	Accounting	Accrual	Allows Execute access for creating the accrued bills.	Execute	
Generate/edit accrual data	Accounting	Accrual	Allows View, Modify, Create and/or Execute access for data used in creation of accrued bills.	View	
				Modify	
				Create	
				Execute	

User Manager Options (Setup – Users)	Main Menu in EnergyCAP	Sub Menu in EnergyCAP	Description of Object	Action Levels	Check box
ADVANCED SCRIPTS  	Analysis	Advanced Scripts	Allows access to the Advanced Scripts workspace. Users with this permission have the ability to create and execute analyses using Visual Basic scripts to examine data for specific conditions. Rate Analysis is included under Advanced Scripts	View	
AUDITS 	Analysis	Audits	Allows View access to the Audit Manager.	View	
Audit properties	Analysis	Audits	Allows users the ability to define, schedule, execute and view results of automated processes that examine data for predefined conditions.	Modify	
				Delete	
				Create	
				Execute	
CHARTS 	Analysis	Charts	Allows View access to the Data Charting workspace. Users with this permission have the ability to view channel data in a graphical display. Channel data is meter interval data, weather data, counter data and meter readings.	Modify	
				Delete	
				Create	
Chart Public Folder Properties	Analysis	Charts	Allows privileges for access to the chart public folder.	Modify	
				Delete	
				Create	
CONTACTS 	Setup	Contacts	Allows View access to the Contact Manager.	View	
Customer properties	Setup	Contacts	Allows Modify, Delete, and/or Create access for customers.	Modify	
				Delete	
				Create	
Person properties	Setup	Contacts	Allows Modify, Delete, and/or Create access for persons.	Modify	
				Delete	
				Create	
Vendor properties	Setup	Contacts	Allows Modify, Delete, and/or Create access for vendors.	Modify	
				Delete	
				Create	

User Manager Options (Setup – Users)	Main Menu in EnergyCAP	Sub Menu in EnergyCAP	Description of Object	Action Levels	Check box
COST AVOIDANCE 	Cost Avoidance	Savings & Normalizations	Allows the Cost Avoidance – Calculate Savings processor to be executed, i.e. performs cost avoidance calculations; also includes Global Meter Update from Cost Avoidance menu	View	
Cost avoidance	Cost Avoidance	Savings & Normalizations	Same as above.	View	
FACILITIES 	Setup	Facilities	Allows View access to the Facility Manager, the hierarchical tree display used to organize sites, places, meters and counters.	View	
Counter properties	Setup	Facilities	Allows Modify, Delete, and/or Create access for counters.	Modify	
				Delete	
				Create	
ENERGY STAR	Setup	Facilities & Place Properties	Allows viewing of ENERGY STAR tabs and configuration information. The Execute privilege permits submission of building ENERGY STAR data to the EPA.	View	
				Execute	
Meter properties	Setup	Facilities	Allows Modify, Delete, and/or Create access for meters.	Modify	
				Delete	
				Create	
Place properties	Setup	Facilities	Allows Modify, Delete, and/or Create access for places.	Modify	
				Delete	
				Create	
GREENHOUSE GAS	Facilities	Greenhouse Gases	Allows viewing of GHG menu, and import/export of emissions factors	Modify	
				Delete	
				Create	
Greenhouse Gas	Facilities	Greenhouse Gases	Allows access to GHG administrative functions including setting reporting scope, creating factors, entering GHG Credit or Manual Emissions, and running the GHG Processor	Modify	
				Delete	
				Create	
GROUPS 	Setup	Groups	Allows View access to the Group Manager, the hierarchical tree display used to organize places and meters into user-defined categories.	View	
Meter properties	Setup	Facilities	Allows Modify, Delete,	Modify	

<i>User Manager Options (Setup – Users)</i>	<i>Main Menu in EnergyCAP</i>	<i>Sub Menu in EnergyCAP</i>	<i>Description of Object</i>	<i>Action Levels</i>	<i>Check box</i>
			and/or Create access for meters.	Delete	
				Create	
Meter/place group properties	Setup	Groups	Allows Modify, Delete, and/or Create access for place and meter groups.	Modify	
				Delete	
				Create	
Place properties	Setup	Facilities	Allows Modify, Delete, and/or Create access for places.	Modify	
				Delete	
				Create	
LOAD PROFILES 	Analysis	Loadshapes	Allows View access to the Loadshape Manager, the hierarchical tree display used to organize loadshapes.	View	
Load profile properties	Analysis	Loadshapes	Allows Modify, Delete and/or Create access to load profile properties.	Modify	
				Delete	
				Create	
OTHER SETTINGS	Various	Various	Misc system settings & functions	NA	
Data system properties 	Top Bar Menu: Tools	Unit System	Allows View, Modify, Create and/or Execute access to the Unit System Editor (units of measure, conversion factors, bill line item table)	View	
				Modify	
				Delete	
				Create	
Database administration	Admin	N/A	Special database functions (attach, detach, etc) available only in Desktop version for use with MSDE	View	
				Modify	
Editor properties 	Top Bar Menu: Setup – Facility and also Accounting-Account.	Editors	Allows View, Modify, Create and/or Execute access to the available editors in the EnergyCAP Enterprise views. Editors are used for specialty data such as G/L codes, special charges and place types.	View	
				Modify	
				Delete	
				Create	
Export 	Top Bar Menu: File	Export	Allows Execute access for exporting data in the EnergyCAP Enterprise views. Primarily used for bill export to A/P and G/L.	Execute	

User Manager Options (Setup – Users)	Main Menu in EnergyCAP	Sub Menu in EnergyCAP	Description of Object	Action Levels	Check box
Import	Top Bar Menu: File	Import	Allows Execute access for importing data in the EnergyCAP Enterprise views. Used for import of weather data, meter interval data, counter data and bills.	Execute	
Processor 	Top Bar Menu: Tools	Processor	Allows Execute access for using processors in the EnergyCAP Enterprise views (see menu options at left).	Execute	
System options 	Top Bar Menu: Tools	Options & View Options	Allows View and/or Modify access to EnergyCAP Enterprise global system <u>options</u> such as the fiscal year start month and the organization name.	View Modify	
Work flow management 	Top Bar Menu: Tools	Work Flow Wizard	Allows View, Modify and/or Delete access to bill messaging/approval in the Work Flow Manager. Lack of access causes menu options shown at left to be disabled. Need Modify permission to edit audit results.	View Modify Delete	
Work flow setup 	Top Bar Menu: Tools	Work Flow Wizard	Allows View and/or Modify access to the Work Flow Wizard. These settings affect bill entry, Work Flow Manager displays, and batching options.	View Modify	
PROJECTS (Budgets) 	Analysis	Budgets	Allows View access to the Budget Manager, the hierarchical tree display used to organize budgets.	View	
Project properties	Analysis	Budgets	Allows Modify, Delete and/or Create access to budget properties.	Modify Delete Create	

User Manager Options (Setup – Users)	Main Menu in EnergyCAP	Sub Menu in EnergyCAP	Description of Object	Action Levels	Check box
RATES 	Accounting	Rates	Allows View access to the Rate Manager, the hierarchical tree display used to organize the data entry display formats and tariff information for each defined utility commodity.	View	
Rate properties	Accounting	Rates	Allows Modify, Delete, and/or Create access for rates.	Modify Delete Create	
REPORTS   	Reporting Also Analysis – Custom Spreadsheets	Reports	Allows View access to the Report Manager, the overview display of reports; also Analysis – Custom Spreadsheets.	View	
Report administration	Reporting	Reports	Allows privileges for uninstalling reports.	Modify Delete Create	
Report batch properties	Reporting	Reports	Allows Modify, Delete and/or Create access for report batches.	Modify Delete Create	
Report properties	Reporting	Reports	Allows Modify, Delete and/or access for report filter settings.	Modify Delete Create	
Report public folder properties	Reporting	Reports	Allows privileges for the Reports public folder	Modify Delete Create	
ROUTES 	Setup	Routes	Allows View access to the Route Manager, the hierarchical display of meter routes defined in EnergyCAP Enterprise.	View	
Channel data properties	Setup	Routes	Allows Modify, Delete and/or Create access to channel data properties.	Modify Delete Create	
Meter properties	Setup	Routes	Allows Modify, Delete and/or Create access to meter properties.	Modify Delete Create	

User Manager Options (Setup – Users)	Main Menu in EnergyCAP	Sub Menu in EnergyCAP	Description of Object	Action Levels	Check box
Route properties	Setup	Routes	Allows Modify, Delete and/or Create access to route properties.	Modify Delete Create	
RUN ADMINISTRATOR	External Program	N/A	Performs miscellaneous advanced functions not available within the EnergyCAP application.	Execute	
TEMPLATES 	Accounting	Templates	Allows View access to the Template Manager, the hierarchical tree display used to organize data entry display formats for each commodity defined in EnergyCAP Enterprise.	View	
Template properties	Accounting	Templates	Allows Modify, Delete and/or Create access for rate templates.	Modify Delete Create	
USERS 	Setup	Users	Allows View access to the User Manager, the overview display of users defined in EnergyCAP Enterprise. To give a User access to change his/her own password ONLY, give View to this permission and Modify to the permission below.	View	
User properties	Setup	Users	Allows Modify, Delete and/or Create access for users.	Modify Delete Create	
User security properties	Setup	Users	Allows View access to user security settings for accessing individual areas of the system.	View	
WEATHER STATIONS 	Setup	Weather Stations	Allows View access to the Weather Station Manager, the overview display of the weather stations defined in EnergyCAP Enterprise. Browser version accesses entire North America weather database, not EnergyCAP database.	View	
Weather station properties	Setup	Weather Stations	Allows Modify, Delete and/or Create access for weather stations.	Modify Delete Create	
WEB REPORTS	Reporting	Web Reports	Permits viewing of Web Reports.	View	
All Reports	Reporting	Web Reports	Provides access to All Reports.	View	

<i>User Manager Options (Setup – Users)</i>	<i>Main Menu in EnergyCAP</i>	<i>Sub Menu in EnergyCAP</i>	<i>Description of Object</i>	<i>Action Levels</i>	<i>Check box</i>
My Configured Reports	Reporting	Web Reports	Provides access to My Configured WebReports.	View	
Report Batches	Reporting	Web Reports	Provides access to Web Report Batches.	View	
Report E-mail Batches	Reporting	Web Reports	Provides access to Web Report E-mail Batches..	View	
Shared Reports	Reporting	Web Reports	Provides access to Web Shared Reports.	View	
WORK FLOW MANAGER 	Accounting	Work Flow Manager	Allows View access to the Work Flow Manager, the overview display of bills in EnergyCAP Enterprise.	View	
Bill properties	Accounting	Work Flow Manager	Allows Modify, Delete and/or Create access for bills.	Modify	
				Delete	
				Create	

<i>Action Level</i>	<i>Description</i>
View	Users are only able to view information pertaining to a particular area.
Modify	Users are able to view and edit information pertaining to a particular area but are restricted from creating or deleting any data. Users are restricted from executing functions in this area.
Delete	Users are able to view and delete information pertaining to a particular area but are restricted from creating or modifying any data. Users are restricted from executing functions in this area.
Create	Users are able to view and create information pertaining to a particular area but are restricted from modifying or deleting any data. Users are restricted from executing functions in this area.
Execute	Users are able to view information and run functions pertaining to a particular area.