

Working with Observation Types

The Unit System Editor **Types** tab lists unit types by their code and display. You can sort the lists by clicking a column heading. Sort the lists in reverse order by clicking the column heading once more.

For default Types, it is only possible to edit the Display name. For user-created Types, any of the fields can be edited.



Editing or deleting unit system data can cause unexpected behavior in other areas. Because in some database tables, EnergyCAP stores billing data based on unit conversions in place at the time of bill entry, modifications to the unit system may require running the cleanbill* process for historical bills.

1. From the **Tools** menu in any module or view, select **Unit System**. The **Unit System Editor** window appears.
 2. Select the **Types** tab to manage observation types.
- **Add** a type by clicking . The **Create Type** window appears.
 - a. In the Code field, enter the unique, self-defined identifier.
 - b. In the Display field, enter the name to appear throughout the system.
 - c. Select the Class from the drop-down list. In EnergyCAP, the Class indicates what sort of observation is being made. It answers the question: "What is being tracked?" The number of Classes is limited and fixed.
 - d. Select the time of use from the drop-down list (applicable for time-of-use commodities).
 - e. Select the origin from the drop-down list. The number of Origins is limited and fixed.
 - f. Select the applied status from the drop-down list. There are only three statuses: Credit/Provided, Debit/Consumed and Ignore.
 - g. Click **OK**. The **Create Type** window closes.
 - **Modify** a type by selecting the appropriate type then clicking . The **Type Properties** window appears. Note that default Type codes and other properties cannot be modified. Only the Display for a default Type can be changed. User-created Types are fully editable.
 - a. Change the Code by clearing the **Code** field then entering the new code.
 - b. Change the Display by clearing the **Display** field then entering the new display.
 - c. Change the Class by selecting the new class from the drop-down list. In EnergyCAP, the Class indicates what sort of observation is being made. It answers the question: "What is being tracked?" The number of Classes is limited and fixed.
 - d. Change the Time of Use (TOU) by selecting the new time from the drop-down list. TOU values apply primarily to certain measurements of electricity. Note that the number of TOU options in EnergyCAP is limited and fixed.
 - e. Change the Origin by selecting the new origin from the drop-down list. The Origin option answers the question: "How is this commodity type being provided?" Note that the number of Origin options in EnergyCAP is limited and fixed.
 - f. Change the Applied status by selecting the new applied status from the drop-down list. Note that the number of Applied status options in EnergyCAP is limited and fixed. Credit/Provided would refer to a production-related Unit Type. Debit /Consumed would refer to most traditional utility billing scenarios. Ignore would indicate that production or consumption does not relate to this unit Type.
 - g. Click **OK**. The **Type Properties** window closes.
 - **Delete** a type by selecting the appropriate type then clicking . Note that default Types cannot be deleted. Only user-created Types can be deleted. The **Confirm** window appears.
 - Click **Yes** to delete the type.
 - Click **No** to cancel the operation.
1. After making your selections, exit the **Unit System Editor** by clicking **Close**.

*Cleanbill is a script which reprocesses a defined set of bill data, marking the set as 'dirty' and then repopulating relevant database tables based on the newest unit conversion settings. This process updates values for native usage units, common usage units, and rollup usage units.