

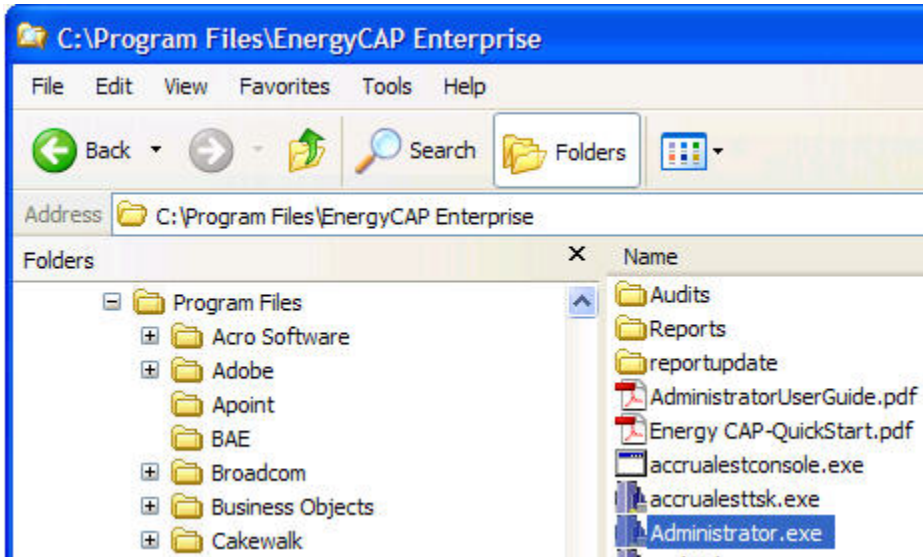
Creating a User-Defined Filed (UDF) in EnergyCAP

User-Defined Fields can be used effectively in EnergyCAP to expand the software's ability to do energy benchmarking based on various place attributes, such as occupancy hours or production units. UDFs can also be used to link to external web-based documents.

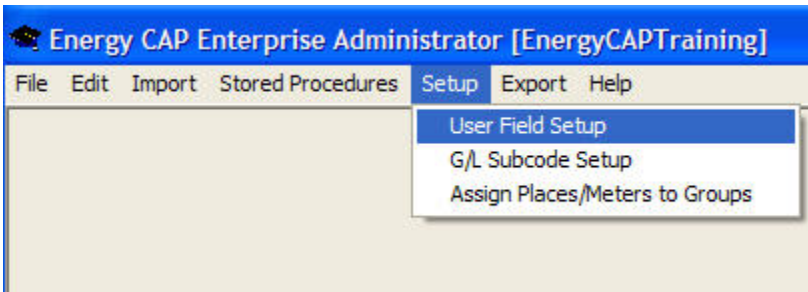
NOTE: User Defined Fields can only be managed in ECE until 6.3 SP2. In software releases 6.3 SP3 and following, the UDF tab is no longer available in ECE as all UDF functionality has moved over to EnergyCAP Online.

To create a UDF, follow the procedure below:

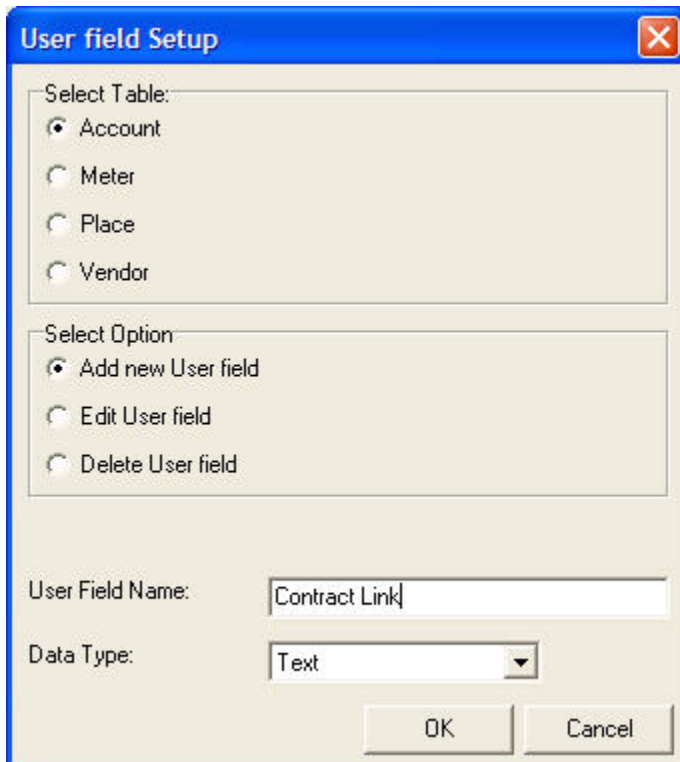
1. Launch the EnergyCAP **Administrator** program. This supplementary software management program is, by default, installed to C:\Program Files\EnergyCAP Enterprise\Administrator.exe.



2. After logging into **Administrator**, click **Setup > User Field Setup** from the Administrator menu options.



The **User field Setup** window will open.



The screenshot shows a dialog box titled "User field Setup". It has a blue title bar with a close button. The dialog is divided into two main sections. The first section, "Select Table:", contains four radio buttons: "Account" (which is selected), "Meter", "Place", and "Vendor". The second section, "Select Option:", contains three radio buttons: "Add new User field" (which is selected), "Edit User field", and "Delete User field". Below these sections are two input fields. The first is "User Field Name:" with a text box containing the text "Contract Link". The second is "Data Type:" with a dropdown menu currently showing "Text". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Complete setup as follows:

1. Select the type of UDF you want to create (**Account**, **Vendor**, **Meter**, or **Place**).
2. Select the Add/Edit/Delete **option** that is appropriate for the user field. For example, select "Add new User field" if adding a new UDF.
3. Input the **User Field Name** in the text box provided.
4. Select the **Data Type** from the drop-down list box (**Any Numbers**, **Date**, **Text**, **Whole Numbers**). The **Text** option is usually the most appropriate, and should be used for any HTML link information.
5. Click **OK** to save the settings and close the **User field Setup** window. The UDF has been created.
6. Exit the Administrator program.

Entering data into a UDF

Now that the UDF has been created, let's see how to use the newly-created UDF to link to any web-based external document, such as a utility contract:

1. Open EnergyCAP and navigate to the desired account/vendor/meter/place. The UDF label and any specific value associated with that account/vendor/meter/place will appear in the General tab PowerView.

The screenshot shows the 'Account Manager' application. On the left is a tree view of 'Cost Centers' with 'County' expanded to show sub-accounts: 'Account Closed' (1050, 1244, 1259), 'Community Dev', 'General Gov Admin', 'Health & Welfare', 'Judicial Admin', 'Parks & Rec', 'Public Safety', and 'Public Works'. A red arrow points to the '1259' sub-account under 'Account Closed'.

The main area displays 'Account Properties' for account 1259:

- Code:** 1259
- Display:** 1259
- Location:** Cost Centers---> County---> Account Closed
- Account G/L Record:** Monthly
- Billing Cycle:** - 1/1/3000
- Active:** Atlantic Electric
- Vendor Roles:** Service Provider

Below the properties are links for 'Assign Bill Entry Templates', 'Assign G/L Records', and 'Assign Rate Codes'.

The 'Meters:' section shows:

Code	Display	Commodity
1455	Locate	Electric

The 'Fiscal Year Summary (FY Begins in Jul, Ends in Jun of Year Sho)' section contains a bar chart titled 'Total Cost Summary' with data for 2006 (1,053) and 2007 (66). Below the chart, it says 'No chart available'.

At the bottom, the 'Account User Defined Fields' section is visible, with two red arrows pointing to it. The fields are:

Caption	Value
Last Audit Date	
Contract Link	

2. To insert a specific text/link for the selected account/vendor/meter/place:
 - a. Open the **Properties** window (**File > Properties**).
 - b. Click on the **User Fields** tab, and input the desired **Value** in the cell provided using the appropriate language/tagging:
EXAMPLE:

Link Text

Caption	Value
Last Audit Date	
Contract Link	TYPE CONTRACT LINK HERE!!!

- c. Click **OK** to close the **Properties** window. The UDF value should display under the User Defined Fields list in the General tab PowerView.

! Don't forget the appropriate HTML TAGS when inputting a web link! Then the UDF value will show in blue on the General Tab so you can click on it like a hyperlink. You may need to refresh your screen before the EnergyCAP PowerView will display newly-input data!

Printing/Reporting UDF information

Setup reports **SU43-SU46** can be configured to display and print the contents of UDFs.