

Release 6.1.60.47 (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	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.
Multiple	New Web Reports Manager: The Web Reports Manager has been replaced with an all-new design. See below.

When you click on Web Reports from the Reporting menu bar (only applies to users whose database is hosted on a remote server and accessed via Internet), you will see the **new Web Reports interface**:

The screenshot displays the new Web Reports interface. On the left is a navigation pane with categories like 'Most Recent Reports', 'Recommended Reports', 'My Configured Reports', and 'All Reports'. The main area shows a list of reports with columns for 'Code', 'Display', and a delete icon. Report 'YY08 Building Group Comparison by Cost' is highlighted. To the right, a preview of report 'BL12 - Executive Summary by Commodity' is shown, featuring pie charts for 'Energy Use Percentage' and 'Cost Percentage', and a data table. Callout boxes 1-5 highlight specific interface elements.

Code	Display	
AN01	Place Cost Profile	✕
AN02	Place Energy Profile	✕
AN07	Place Summary	✕
BL01	Meter Summary by Period	✕
BL07	Bill Details	✕
BL12	Executive Summary by Commodity	✕
BL25	Executive Cost Profile Fiscal Year	✕
CAP01B	Cost Avoidance Summary By Building	✕
CAP07	Executive Summary	✕
SU01	Account List By Vendor	✕
SU34	Places Meters and Accounts List	✕
YY08	Building Group Comparison by Cost	✕
YY10	Five Year Cost Comparison	✕

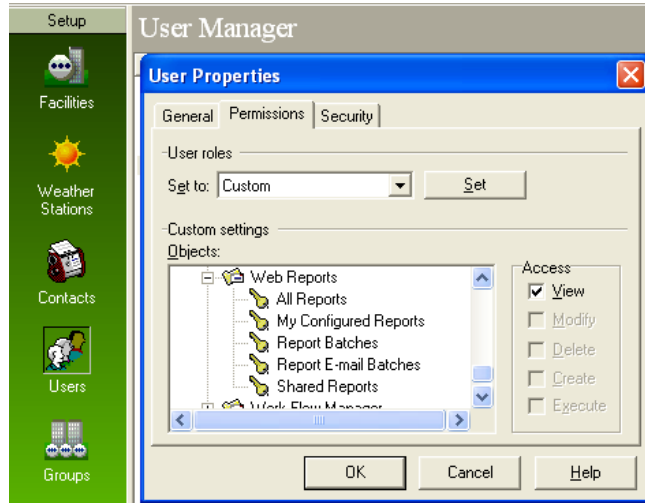
Commodity	Commodity Use	Energy Use: MMBtu	Energy Percentage	Cost	Cost Percentage	Cost/Unit
ELECTRIC	5,976,683 kWh	26,266	48%	\$261,693.52	44.80%	\$8.372 / 1000kWh
NATURAL GAS	22,394 DTH/MB	22,394	52%	\$245,340.51	35.81%	\$11.073 / CWT/MB
SEWER				\$1,228.83	0.21%	
SEWER	22,662 MG/4			\$27,883.19	3.71%	\$3.832 / 1000MG
TELEPHONE	0 Min			\$76,681.96	4.90%	
WATER	58,475 MG/4			\$256,294.91	35.58%	\$5.190 / 1000MG
Grand Totals:		42,720		\$1,566,445.88		

Report Description
One-page summary of cost, usage, unit cost and cost/area of all commodities for all buildings or all cost centers, or filtered for single locations. When you need a report that provides a separate page for EACH building or cost center, use AN07 or BL10. Breaks out total energy costs by commodity (electricity/gas/etc.)

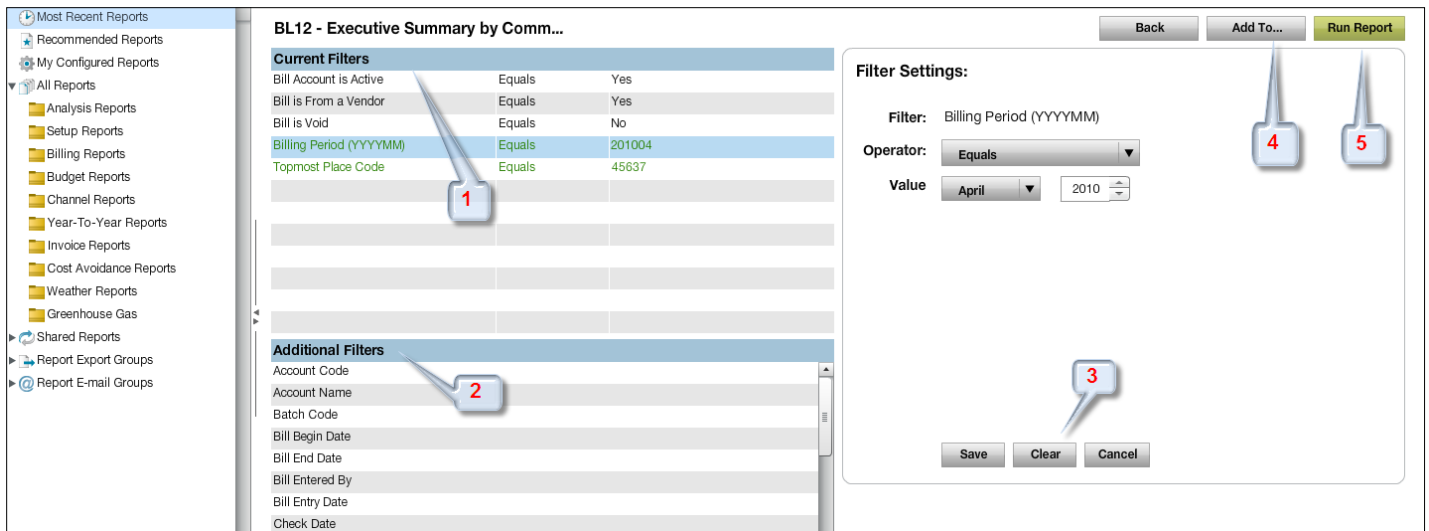
1. The reports lists have been renamed and enhanced:

- **Most Recent Reports:** This list automatically includes each report a user has run in the last six months as a convenient starting point.
- **Recommended Reports:** This is not configurable at this time. It includes a list of about twenty reports that are considered to be the key reports for most users.
- **My Configured Reports:** Equivalent to the previous Saved Reports folder. It includes those reports that a user has Added To this folder (see **Add To** button on next page) in order to configure a specific code, name and filter setting.
- **All Reports:** It is equivalent to the previous Installed Reports folder and displays the same report categories as before when expanded.
- **Shared Reports:** equivalent to the previous Public Reports. These are Configured Reports that are open to all users and may have been given a user-defined code, name and filter setting.

- **Report Export Groups:** Equivalent to the previous Report Batches.
- **Report Email Groups:** Equivalent to the previous Report Distribution
- A great new feature is **expanded report folder permissions**. You can control which of these report folders a user can view and manage:



2. Use the **X** button to remove a report from the **Most Recent** and **My Configured** lists. This does not delete the report from the database, just from the respective list.
3. A *sample* report will be shown to illustrate the format and style. This is *not* a sample from your database, it is a generic sample.
4. A Report Description is shown.
5. Click *Next* to proceed if this is the report you want to run.



1. The filters currently in use are shown in the **Current Filters** list. This gives you a quick way to see which filters are now limiting your report results.
2. All other available filters are shown below in alphabetical order. You can click on one in order to Save it to the Current Filters list.
3. Click on Clear to remove a Current Filter, or Save to add a filter setting. (NOTE: Some filters in the Current Filters list appear in green – EnergyCAP’s **Recommended Filters** for that report. These are important filters that cannot be removed from the Current Filters list because they are usually used on the report. They can be Cleared so that no filter is set, but they are never removed from the list.)
4. Use the **Add To** button to add a report to the **My Configured Reports, Shared or Report Export Group** lists. This saves your filter settings for quick use later when you want to run the same report with the same settings. By Adding the report to the **Shared Reports** list, other users can run the report with your settings.
5. Click to run the report.

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	

Ticket#	Description
#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	

Ticket#	Description
#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.

Ticket#	Description
#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.

Ticket#	Description
#819	UDF links: Enhanced functionality so that HTML-coded links in User-Defined Fields will work with both HTTP and HTTPS sites.