

**Morning Session: February 27, 2023
9:00 AM – 12:00 PM CT**

WELCOME

- A. Introductions
- B. Training Logistics
- C. Intro Video

ENERGYCAP OVERVIEW

- D. Basic Concepts
 - a. Meter, Commodity, Account
 - b. Virtual Accounts, Virtual Submeters (vSM)
 - c. Hierarchy Concept: Building & Meter vs. Cost Center & Account
- E. Navigation Overview
 - a. Buildings & Meters
 - b. Accounts
 - c. Bills/Bill Processing
 - d. Groups & Benchmarks
 - e. Chargebacks
 - f. Interval Data
 - g. Vendors & Rates
 - h. Reports Library & Quick Reports
 - i. Dashboards
 - j. Help Menu
 - k. User and System Settings
 - l. Users & Roles
- F. Running and Sharing Reports
- G. Creating and Sharing Dashboards

Afternoon Session: February 27, 2023

1:00 PM – 4:00 PM

WORKING in EnergyCAP

- A. Bill Audits Overview
- B. Reviewing and Resolving Bill Flags
- C. Reviewing and Fixing Bill Kickouts
- D. Creating items in EnergyCAP Overview
- E. Hands on Part 1
 - a. Creating an Organization and Building
 - b. Creating a Meter
 - c. Creating an Account
 - d. Entering a Bill
- F. Hands on Part 2
 - a. Creating a Bill Import Format
 - b. Updating your Bill Import File
 - c. Importing your Bill Import File
- G. Q & A Session (Open Forum)
- H. Additional Topics (Time Permitting)
 - a. Using Setup Spreadsheets to Create and Update information in EnergyCAP
 - b. Custom Fields for Meters, Accounts, Buildings, Vendors
 - c. Importing Interval Data