

Adding & Editing User Defined Fields

Description

User-Defined Fields (UDFs) 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. They support select lists with predefined options, and they are available as report filters. User-Defined fields are available for use in creating auto-maintaining Groups.

This topic will...

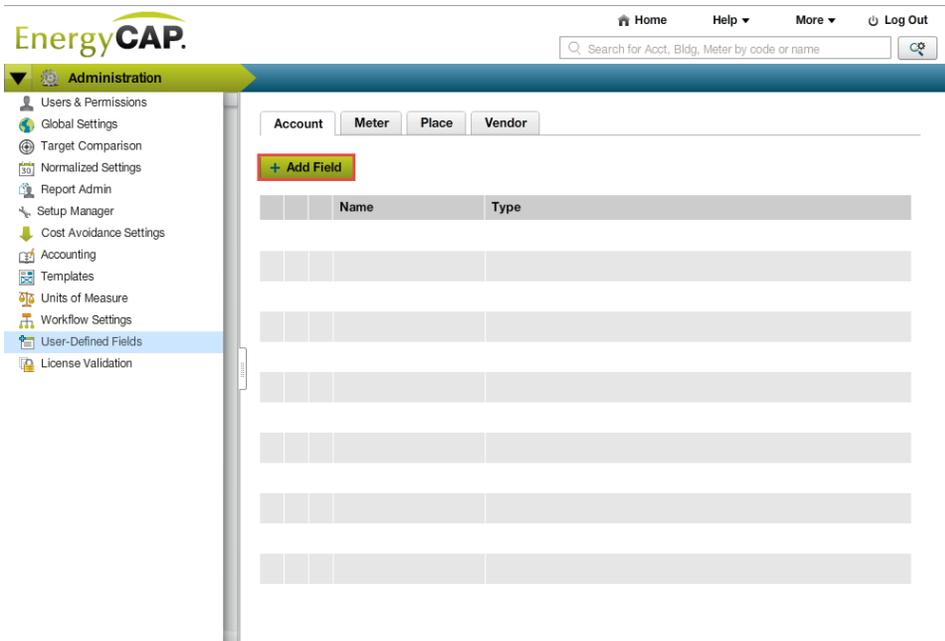
- Describe the process for adding a User-Defined Field.
- Describe the process for editing the name of a User-Defined Field.

Prerequisites

- The ability to add or edit User-Defined Fields requires permissions associated with the following User Roles:
 - Administrator - Full Access

Step-by-Step: Adding a User-Defined Field

1. Navigate to the Administration section in one of two ways:
 - Select **Administration** from the Main Menu, OR
 - Click **Admin** under the More page header options.
2. Select the **User-Defined Fields** tree node.
3. Select the tab (Account, Meter, Place, Vendor) that corresponds to the area where the UDF will be added. Click the **Add Field** button above the grid.



4. On the General tab:
 - Enter a unique **Name**.
 - Select a **Type**. If type is **Select List (Select)**:
 - Enter the list options in the Options column of the grid.
 - Click the **Add Option** button to add more grid rows.
 - Move or Delete each option as needed.

Add Account User-Defined Field ✕

General

Name *

Type *

The following options will be available in the Select List:

+ Add Option

		Option *
⋮	🗑	YES
⋮	🗑	<input type="text"/>

* Required Field

5. Click **Save**. The **Add User-Defined Field** window will close and the UDF is added.

Step-by-Step: Editing a User-Defined Field Name

1. Following the **Adding a User-Defined Field** instructions above, navigate to the desired UDF tab (Account, Meter, Place, Vendor) in order to edit the **UDF Name**.
2. Click the pencil next the the UDF that is to be edited.
3. Edit the **Name** and click **Save**. The **User-Defined Field Properties** window will close and the **Name** will be updated.

The screenshot displays the EnergyCAP Administration interface. On the left is a navigation menu with categories like 'Users & Permissions', 'Global Settings', and 'User-Defined Fields'. The main area shows a configuration page for 'Account User-Defined Field Properties'. At the top, there are tabs for 'Account', 'Meter', 'Place', and 'Vendor'. Below these is a table of existing fields:

Name	Type
Account UDF #1	Text (String)
Account UDF #2	Whole Numbers (Integer)

The 'Account UDF #2' row is selected, and a modal window titled 'Account User-Defined Field Properties' is open. It has a 'General' tab and contains the following fields:

- Name ***: A text input field containing 'Account UDF #2'.
- Type ***: A dropdown menu currently set to 'Whole Numbers (Integer)'.

A red asterisk indicates that both fields are required. At the bottom of the modal are 'Cancel' and 'Save' buttons.

Rules & Restrictions

- The UDF name must be unique per area. The same name can be used across multiple areas (Account, Vendor, etc)
- The Options grid for a Select List determines the exact order the values are listed in the dropdown
- Only the display **Name** and if applicable the **Select List Option field(s)** can be edited, the UDF **Type** CANNOT be edited.