

# CLIENT EDUCATION VIDEOS

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| Administration Videos                                                                                  |                                                                                                      |                                                                                                           |                                                                                                   |
|--------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| <p><b>Getting Started</b></p> <p>The Dashboard, help resources, and basic EnergyCAP setup.</p>         | <p><b>Templates /Workflow Settings</b></p> <p>Templates and workflows can speed bill processing.</p> | <p><b>Adding a New User</b></p> <p>Step-by-step directions for adding a new user from Administration.</p> | <p><b>Bill Entry Templates</b></p> <p>Learn how to create and edit your bill entry templates.</p> |
| <p><b>Security and Licensing</b></p> <p>Find out about security, ownership, hosting and licensing.</p> | <p><b>Branding EnergyCAP</b></p> <p>Customize the appearance of your web interface.</p>              | <p><b>Changing Units of Measure</b></p> <p>Converting global units from MMBTU's to KBTU's.</p>            | <p><b>Overview of Administration</b></p> <p>Configure global settings and manage users.</p>       |
| <p><b>Search Feature</b></p> <p>How to use the EnergyCAP Search feature.</p>                           | <p><b>Cost Avoidance Processors</b></p> <p>The basics of using the processors.</p>                   | <p><b>Users and Permissions   Global Settings</b></p> <p>An overview of these Administration modules.</p> |                                                                                                   |

| Accounts Videos                                                                                |                                                                                     |                                                                                               |                                                                                                           |
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| <p><b>Creating a Utility Bill Account</b></p> <p>Description of basic account/meter setup.</p> | <p><b>Overview of Accounts</b></p> <p>Setting up and using the Accounts module.</p> | <p><b>Inactive Meters and Accounts</b></p> <p>How to manage inactive meters and accounts.</p> | <p><b>Creating and Editing Accounts and Meters</b></p> <p>How to create and edit accounts and meters.</p> |

| Benchmarking                                                                                |                                                                                                      |
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| <p><b>Managing Benchmark Groups</b></p> <p>Learn how to manager meter and place groups.</p> | <p><b>Groups and Benchmarking</b></p> <p>Introduces place and meter groups and automatic groups.</p> |

## Bill Processing

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| <p><b>Changing a Bill Entry Template</b></p> <p>Change the bill entry template for a meter.</p> | <p><b>Importing Multiple-Meter Bills</b></p> <p>Import bills with multiple meters.</p>                            | <p><b>How to Modify Audit Groups</b></p> <p>Create a good audit process by modifying existing audit groups.</p> | <p><b>Bill Processing Overview</b></p> <p>Get the big picture on bill processing options.</p> |
| <p><b>The Basics of Importing Bills</b></p> <p>Save time by importing utility bills.</p>        | <p><b>Importing Bills in Excel Format</b></p> <p>Step-by-step guide for common bill import.</p>                   | <p><b>Overview of Bill Audits</b></p> <p>Bill audits, tolerances, and audit groups.</p>                         | <p><b>Preparing Data for Import</b></p> <p>Prepare bill data import spreadsheets.</p>         |
| <p><b>How to Create an Audit Group</b></p> <p>Directions for creating and audit group.</p>      | <p><b>Resolving Bill Audit Problems</b></p> <p>What to do when EnergyCAP reveals a potential billing problem.</p> | <p><b>Overview of Bill Lists</b></p> <p>Use the bill list feature to customize your view of bill data.</p>      | <p><b>How to Enter a Utility Bill</b></p> <p>How to enter a utility bill manually.</p>        |

## Buildings and Meters

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| <p><b>Assigning a Bill Entry Template</b></p> <p>How to make changes to a meter's bill entry template.</p> | <p><b>ENERGY STAR Overview</b></p> <p>ENERGY STAR setup, automated data submittal, and responses.</p> | <p><b>Buildings and Meters Overview</b></p> <p>Overview of the Buildings and Meters module.</p> | <p><b>Making Special Adjustments</b></p> <p>How to make special adjustments in Cost Avoidance.</p>       |
| <p><b>Calendarization Overview</b></p> <p>Calendarization of utility data for better reporting.</p>        | <p><b>Normalization Overview</b></p> <p>How to normalize data for better energy comparisons.</p>      | <p><b>Project Tracking Overview</b></p> <p>Learn how to track projects.</p>                     | <p><b>Average Unit Cost "Safety Net"</b></p> <p>Using average unit cost to avoid calculation errors.</p> |
| <p><b>How to Create a Building</b></p> <p>Set up place hierarchy.</p>                                      |                                                                                                       |                                                                                                 |                                                                                                          |

## Cost Avoidance

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| <p><b>Cost Avoidance Charts</b></p> <p>EnergyCAP's Cost Avoidance display and calculations.</p> | <p><b>Manual Cost Avoidance</b></p> <p>Cost Avoidance scenarios and how to address them.</p> | <p><b>Other Cost Avoidance Savings</b></p> <p>Explains the most advanced Cost Avoidance features.</p> |
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## Reports

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| <p><b>Running Reports</b></p> <p>Report setup, configuration, and filters.</p> | <p><b>EnergyCAP Report Overview</b></p> <p>Report categories and specific reports.</p> | <p><b>Quick Reports</b></p> <p>How to use quick reports.</p> | <p><b>Report Administration</b></p> <p>Manage reports so users see the data important to them.</p> |
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## Report Designer

### Video 1: Installation

Install instructions and introduces the ribbon.

### Video 2: Using Templates

How to use and customize templates.

### Video 3: Why use Pivot Tables

[Microsoft video](#) introducing the pivot table concept.

### Video 4: Creating Pivot Tables

[Microsoft video](#) for creating pivot tables.

## Vendors and Rates

### Overview of Vendors and Rates

Introduction to the module.

## Weather

### Use vs. Weather

The basics of use vs. weather charts.

### Weather Data Depot

How EnergyCAP tracks weather and the Weather Data Depot.