

Adding 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...

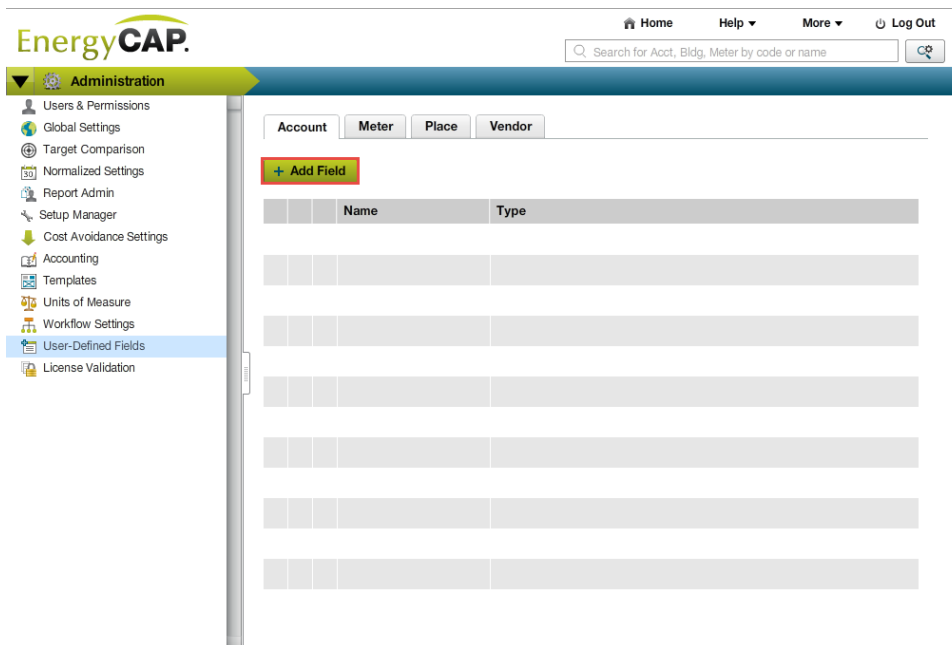
- describe the process for adding a User-Defined field.

Prerequisites

- The ability to add a Rate Code requires permissions associated with the following User Roles:
 - Administrator - Full Access

Step-by-Step

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 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 *
TextField

Type *
Select List (Select)

The following options will be available in the Select List:

+ Add Option

	Option *
⋮	Option 1
⋮	Option 2

* Required Field

Cancel Save

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

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