



# Buildings Help Guide

## Adding an Organization or Building in EnergyCAP

### Description

Buildings and Organizations are created as part of an organizational hierarchy. The tree hierarchy includes nodes representing organization subdivisions (departments, agencies, business units, etc.), as well as individual buildings associated with each division.

### This topic will...

- Describe the process for adding organizations to the tree hierarchy.
- Describe the process for adding buildings to the tree hierarchy.

### Prerequisites

- The ability to add organizations and buildings requires permissions associated with the following User Roles:
  - Administration Full Access
  - Bill Entry & Account Setup

## Step-by-Step Adding an Organization

1. Select **Buildings & Meters** from the Main Menu. The Buildings navigation Tree View will be displayed on the left.
2. Click the **Add** button below the Tree View. Click the **Add Organization** menu option.

The screenshot displays the EnergyCAP interface. On the left, a navigation tree under 'Buildings & Meters' shows a hierarchy: Demo > Academic, Administration, Athletics, Housing, and Parking. Under 'Parking', there are four buildings: Adam Street Garage, Booth Garage, Irving Garage, and University Ave. Garage. The main content area is titled 'Fiscal Year Summary (FY ends in Jun of year shown)' and 'Last updated: 02/27/2013 11:04'. It features a 'Total Cost Summary' bar chart for years 2010, 2011, and 2012. The y-axis represents cost in dollars, ranging from 0 to 250,000. The bars show costs of approximately \$210,000 for 2010, \$220,000 for 2011, and \$90,000 for 2012. Below the chart is a 'Daily Average Cost' table. The table has two columns: 'Percentage Change from Previous Year To Current Year' and 'Current Year: Feb 2012 - Jan 2013'. The first column shows 'N/A' and the second column shows '\$'. A 'Previous Year: Feb 2011 - Jan 2012' section shows '\$508.00'. A 'No Data Available' message is displayed to the right of the chart. At the bottom left, a dropdown menu is open, showing 'Add Organization', 'Add Building', and 'Add Meter' options.

Year	Total Cost (\$)
2010	~210,000
2011	~220,000
2012	~90,000

Percentage Change from Previous Year To Current Year	Current Year: Feb 2012 - Jan 2013
N/A	\$

Previous Year: Feb 2011 - Jan 2012
\$508.00

3. On the Identity tab, complete all relevant fields and then click **Continue**.
  - a. Complete the required **Name** field and press the Tab key
  - b. In the **Code** field, a code based on the name will be automatically created. This field can be edited if desired.
  - c. Select an Organization Type for the Organization by clicking the **Type** drop-down list.

The screenshot shows a dialog box titled "Building/Organization Wizard" with a close button (X) in the top right corner. On the left side, there is a tab labeled "Identity". The main area contains the following text and fields:

Enter the common name of this organizational node and give it a code, which is an abbreviation or shortcut.

**Name \***

**Code \***

Select organization type

**Type**

\* Required Field

At the bottom, there are three buttons: "Back" (disabled), "Finish" (highlighted in green), and "Cancel".

**Name:** The agency or institution name.

**Code:** agencyabbreviation\_agency# [Ex: OSUSTW\_0010]

**Type:** Pick the level after the parent building you are placing this under.

- Organization
- Agency
- Division
- Campus
- Branch

These are example names to illustrate the number of layers in the hierarchy.

4. Click **Finish**. The **Building/Organization Wizard** will close and the new place will be added to the tree hierarchy.

## Adding a Building

1. Select **Buildings & Meters** from the Main Menu. The Buildings navigation Tree View will be displayed on the left.
2. Click the **Add** button below the Tree View. Click the **Add Building** menu option.

The screenshot displays the EnergyCAP web application interface. The top navigation bar includes 'Home', 'Help', 'More', and 'Log Out'. A search bar is present with the text 'Search for Acct, Bldg, Meter by code or name'. The main menu is 'Buildings & Meters', which is expanded to show a tree view on the left. The tree view includes 'Demo' and 'Parking' (selected), with sub-items: 'Adam Street Garage', 'Booth Garage', 'Irving Garage', and 'University Ave. Garage'. A context menu is open below the tree view, showing 'Add Organization', 'Add Building' (highlighted), and 'Add Meter'. The main content area shows a 'Fiscal Year Summary (FY ends in Jun of year shown)' for 2010-2012. It includes a 'Total Cost Summary' bar chart and a 'Daily Average Cost' table. The bar chart shows costs for 2010, 2011, and 2012. The table shows the percentage change from the previous year to the current year, with 'N/A' for 2010 and '\$508.00' for 2011.

Year	Total Cost (\$)
2010	~210,000
2011	~215,000
2012	~90,000

Year	Daily Average Cost (\$)
2010	N/A
2011	\$508.00

3. From the Identity tab, complete all relevant fields and then click **Continue**.
  - a. Complete the required **Name** field and press the Tab key.
  - b. In the **Code** field, a code based on the name will be automatically created. This field can be edited if desired.

Building Wizard

Identity

Address

Additional Details

Enter the common name of this building and give it a code, which is an abbreviation or shortcut.

Name \*

Code \*

\* Required Field

Back Continue Cancel

**Name:** Building Name

**Code:** agency#\_ commonly used # or abbreviation within agency **OR** building initials

**Ex:** Wes Watkins Center

0010\_070 [preferred] OR 0010\_WWC

4. Complete desired address information in the fields provided. Then click **Continue**.

The screenshot shows a software window titled "Building Wizard" with a close button in the top right corner. On the left side, there is a vertical navigation pane with three buttons: "Identity", "Address" (which is highlighted), and "Additional Details". The main area of the window contains the following text and form fields:

Enter the address for this building. The ZIP/Postal Code is used for the US and Canada to automatically link this building with the most appropriate weather station.

**Country**  
 ▼

**Street Address**

**City**

**State/Province/Region**

**ZIP/Postal Code \***

\* Required Field

At the bottom of the window, there are three buttons: "Back" (with a left arrow), "Continue" (with a right arrow and highlighted in green), and "Cancel".

**Street Address** (or nearest equivalent) and **ZIP/Postal Code** are required.

- From the Additional Details tab, complete all relevant fields and then click **Continue**. Radio options are:
  - Select the building **Primary Use** from the drop-down list OR
  - Add a new Primary Use by clicking the **Add** button and following the prompts to define the new Primary Use.
  - Complete the **Floor Area** and **Area Unit of Measure** fields.

The screenshot shows the 'Building Wizard' dialog box. The 'Additional Details' tab is active. The 'Primary Use' field is a dropdown menu with the text 'Select or Click + to Add' and a '+' button. The 'Floor Area' field is a numeric input field with the value '0'. The 'Area Unit of Measure' field is a dropdown menu with the value 'SqFt'. A red asterisk and the text '\* Required Field' are visible at the bottom left. The 'Finish' button is highlighted in green.

- Click **Finish**. The **Building/Organization Wizard** will close and the new building will be added to the tree hierarchy.

### Rules & Restrictions

- Multiple organizational levels can be created by adding organizations under other organizations. Organizations cannot be created below buildings.
- Buildings can only be created below organizations, not under other buildings.

### Additional Information

- City and State will automatically be compared to the zip code entered. If the zip code does not match the city and state, an alternate address will be suggested.
- After the address is save the Organization or Building will automatically be connected to the appropriate weather station based on zip code.
- The Primary Use is referenced when creating auto-groups in Groups & Benchmarking. The primary use auto-group display data for all buildings of the same primary use.