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.
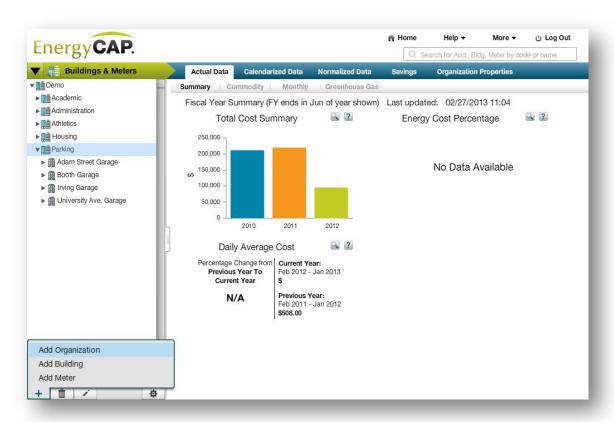
This topic will...

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

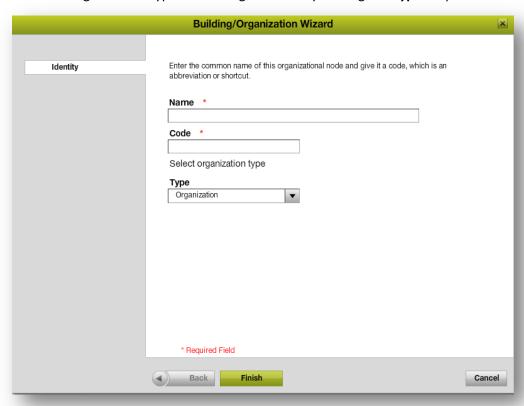- Describe the process for adding buildings to the tree hierarchy.

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.

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.
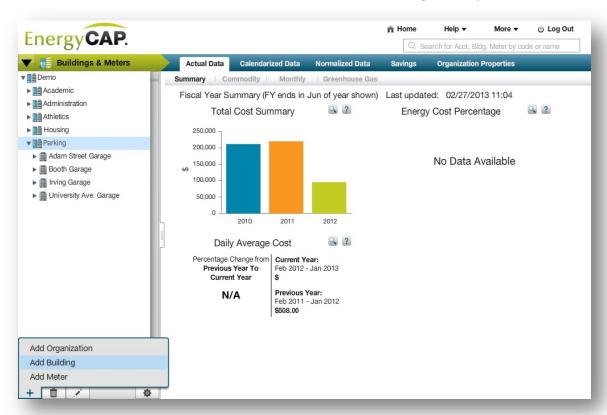   c. Select an Organization Type for the Organization by clicking the **Type** drop-down list.

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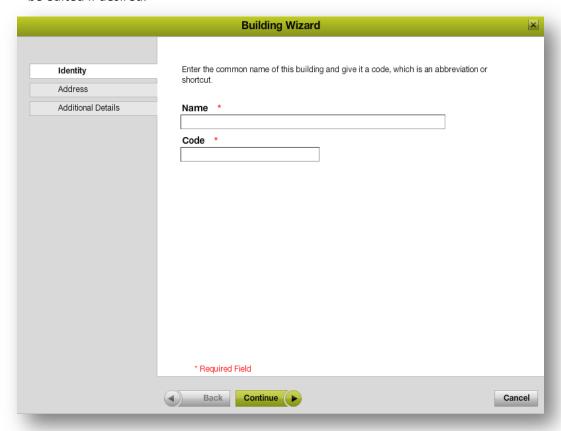- Branch   number of layers in the hierarchy.

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.

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.
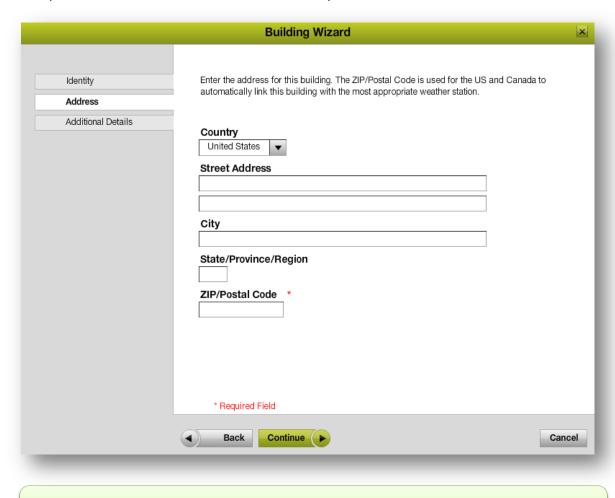

Name: Building Name

Code: agency#_ commonly used # or abbreviation within agency **OR** building initials
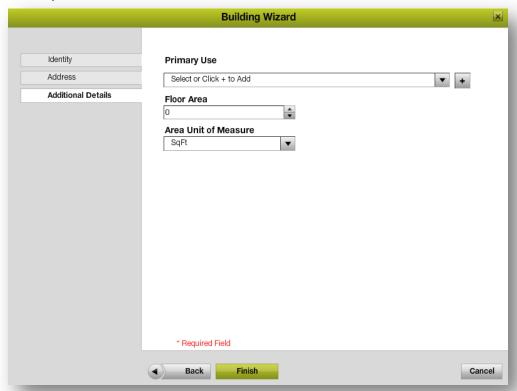
Ex: Wes Watkins Center

0010_070 [preferred] OR **0010_WWC**

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

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

5. 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.

6. 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.