



EnergyCAP navigation and basic setup



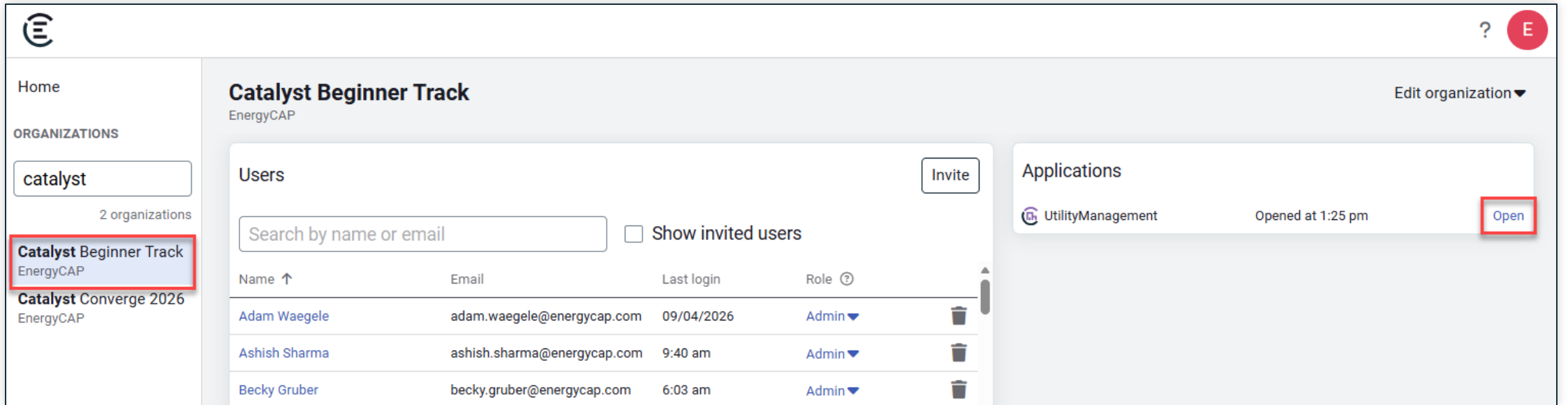
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Housekeeping

For this session:

- Navigate to EnergyCAP Home: **<https://login.energycap.com>**
- Open the database: Catalyst Beginner Track



The screenshot shows the EnergyCAP Catalyst Beginner Track interface. On the left sidebar, under 'ORGANIZATIONS', 'catalyst' is selected, showing '2 organizations'. 'Catalyst Beginner Track' is highlighted with a red box. The main content area is titled 'Catalyst Beginner Track' and includes a 'Users' section with a search bar and a table of users. An 'Applications' section on the right shows 'UtilityManagement' with an 'Open' button highlighted with a red box.

Name ↑	Email	Last login	Role ?
Adam Waegle	adam.waegle@energycap.com	09/04/2026	Admin ▼
Ashish Sharma	ashish.sharma@energycap.com	9:40 am	Admin ▼
Becky Gruber	becky.gruber@energycap.com	6:03 am	Admin ▼

Agenda



- 1. Getting oriented: EnergyCAP Home, Resource Center, notifications & help**
- 2. Finding anything fast: the search bar**
- 3. Create quickly using the Create button**
- 4. A tour of the modules**
- 5. Review General Settings**

Start here every time you log in

EnergyCAP Home

The admin side of your account, separate from the day-to-day app.

- Invite and manage users
- Edit organization details
- Set admin/general user roles

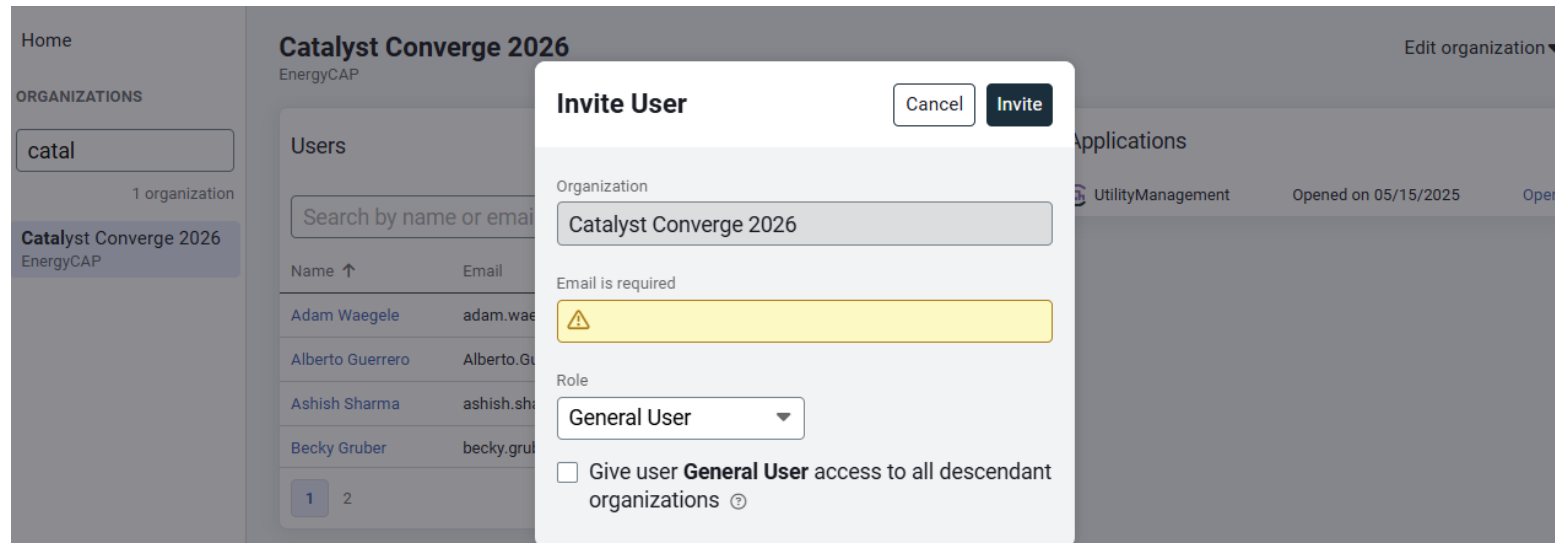
Notifications

- Bill CAPture messages
- ENERGY STAR submission results
- Defaults are set centrally in Settings

Help & Resources

- In-app help links straight to Help Center articles
- EnergyCAP Academy
- Eco Champions community

<https://login.energycap.com>



Finding anything fast: the search bar

Skip the tree — just search

Sites, meters, accounts, and vendors are all searchable, no need to click down through the tree to find what you're after.

- Jump straight to a specific site, meter, or account
- Confirm an object exists before building a report or bill list around it
- Faster than browsing the Sites & Meters or Accounts tree for a one-off lookup



A tour of the modules

Two hierarchies, two views of your data

Every object in EnergyCAP lives in one of two hierarchies, depending on whether you're tracking use or tracking cost.

Sites & Meters

Organizations, sites, and meters in a tree that mirrors your physical footprint — the go-to view for Building Operations and Energy Management.

- Reflects your physical layout, building by building
- Add custom fields to track anything unique to your org
- Doesn't change when financial groupings change

Accounts

Accounts and cost centers grouped to match your financial structure — the go-to view for Finance and Accounting.

- An account is the billing relationship with a vendor
- Supports its own custom fields, independent of Sites & Meters
- Meters can stay constant even if the vendor changes

Where you'll spend most of your time

Bill Lists

Save a filtered list of bills so you can answer the same question again without rebuilding the filters.

- Many filter options and columns to customize
- Export to Excel or take bulk action on the list
- Great for recurring questions from your team

Reports

Pre-built reports covering use, cost, budgets, and more — filtered down to just what you need.

- Topmost filters allow for flexibility with reporting
- Configure and save your own reports
- Set up report distributions

Dashboards

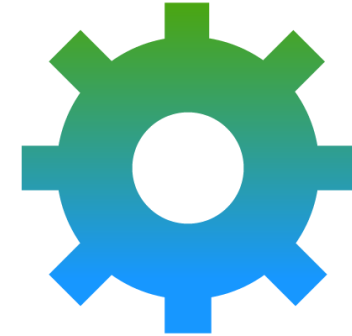
The first thing you see when you log in — visual widgets tuned to what matters most.

- Sample dashboards use your real data as a starting point
- Build personal or department-level dashboards
- Create public dashboards
- Download widget data

General Settings/Gear Icon

Your settings are available to administrators. Examples of settings are:

- Subscription details
- Default notification settings for new users
- User Groups
- Commodities and units
- Data reporting settings
- Target comparison lines for org, site, and meter charts
- Emissions scope categories and factors
- API keys and subscription/license details



Questions?

Thank you! Keep exploring at helpcenter.energycap.com and in the Eco Champions community.