Version 3 to Version 7 Upgrade Guide

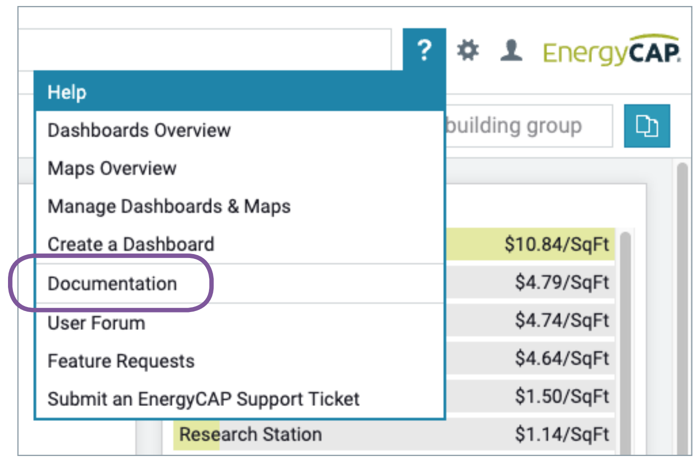
You can begin using EnergyCAP Version 7 at any time. Here are a few steps to get you started.

1. **Upgrade Readiness Checklist**

   Review the Upgrade Readiness Checklist to see which features have been implemented in Version 7. New features are being implemented in Version 7 frequently, so check back often.

2. **Documentation**

   Version 7 contains a robust User Guide. To access the User Guide, click on the **?** in EnergyCAP Version 7 and select Documentation.



3. **How do I begin using Version 7?**

   You don't need to do anything special to begin using Version 7. **Just log in!** All objects (buildings, accounts, meters, bills, etc.) in your database are accessible in both versions. For example, if you create an account in Version 7, you can view and modify that account in Version 3.

There are two items that require special attention when transitioning to Version 7:

a. **User Roles**

   New user roles and permissions have been created in Version 7 to provide more flexibility and granularity with user management and application access. Standard Version 3 user roles have been mapped to similar standard Version 7 user roles.

   If any custom user roles were defined in your database, those user roles were mapped to the "DEFAULT ROLE" in Version 7. The "DEFAULT ROLE" provides view only access to the following modules: Dashboards, Buildings and Meters, Accounts, Groups and Benchmarks, Vendors, and Reports.

Next steps

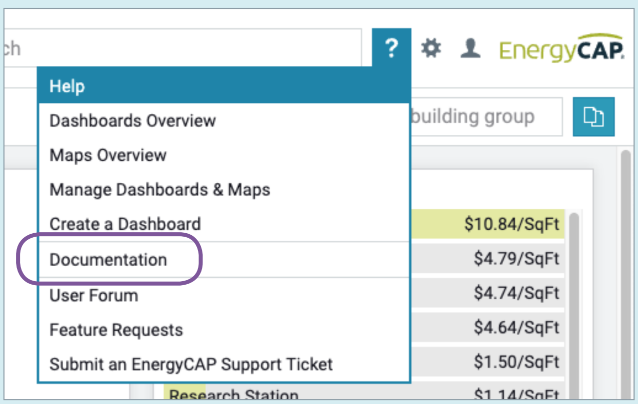
1. Check user role assignments.
2. Note if any of your users is assigned to the "DEFAULT ROLE".
3. If you have users assigned to the "DEFAULT ROLE," you can either assign them to one of the standard user roles or you can set up a new user role and assign those users to the new role.
4. To learn more about user roles, **review the User Roles and Permissions section** of the EnergyCAP User Guide.

b. Chargebacks

- The Chargebacks functionality has been completely redesigned in Version 7 to make it easier to manage chargeback workflows.
- The database tables used to manage Chargebacks in EnergyCAP Version 7 are different from those used in Version 3 (Web Client) and Version 6 (Installed Client); therefore, a conversion process is required. Conversion spreadsheets are now available within the Version 7 application to facilitate the process.
- Note that the Version 7 Chargebacks Conversion Spreadsheets will not transition summary accounts, loss-remainder accounts, virtual accounts, or other calculated accounts. These account types will need to be recreated manually in Version 7 via new creation wizards or by using the **Chargebacks: Bill Calculations** setup sheet.
- Organizations that manage virtual accounts, bill splits, submeters, and calculated accounts in Version 6 (Installed Client) should **contact us** to discuss the conversion process. The process will begin with a review of your current data structure and workflow processes to determine how your organization can most effectively benefit from the powerful new features in Version 7.

Next steps

1. **Watch the EnergyCAP Version 7 Chargebacks Training videos** to learn more about the new Chargebacks functionality and the conversion process.
2. **Review the Setup Spreadsheets documentation** in the Version 7 Help Center, which is accessible from within the application:



3. **Contact your EnergyCAP Account Manager** to request a review of your current chargebacks workflow and determine the best strategy for transitioning to EnergyCAP Version 7.