

The instructions provided below are for upgrading EnergyCAP Enterprise from Release 6.0 to Release 6.1SP1. The version number of EnergyCAP 6.1 is **6.1.60.xx**. (xx will correspond to the current build, and will be 60 or higher). This version *includes* Service Pack 1 to Release 6.1. These instructions apply to EnergyCAP licensees who (1) host their own databases on their SQL Server and (2) access the database via LAN connection.

Additional instructions for upgrading from Release 5.x are included in Appendix B. Users with a release earlier than 5.0 should submit a Help ticket online (<http://support.energycap.com/>) for upgrade assistance.

TABLE OF CONTENTS

Database Upgrade Procedure.....	2
EnergyCAP Enterprise Installation Procedure.....	3
Post-Installation Actions.....	4
APPENDIX A: File Download Procedure.....	10
APPENDIX B: Additional Steps for Release 5.x Updates.....	12

Here is an overview of the upgrade process:

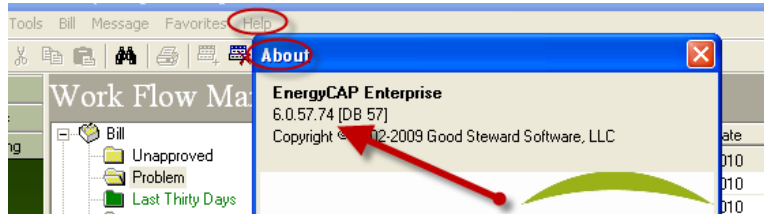
- Download the Setup file, database upgrade script(s) and supporting documentation.
- Back up your existing EnergyCAP database.
- Use SQL Management Studio Express or a similar SQL software tool to execute the appropriate upgrade script (provided) on the EnergyCAP database.
- Execute the Setup file to install EnergyCAP Release 6.1SP1 on each workstation.
- Use one workstation to perform Post-Installation Actions:
 - Update ENERGY STAR
 - Update Audits
 - Update Reports
 - Update Custom Spreadsheets

Follow all of the steps indicated below for each process. Some steps may require IT assistance.

Required software: web browser, SQL Server Management Studio Express or equivalent

Database Upgrade Procedure

1. Run EnergyCAP. Close any open bill entry batches and export any bills awaiting export.
2. Click Help-About to verify your program and database version. In this example, the version is 6.0 and the database is version 57. (format: **release.database.build**, 6.0/57/74)



3. Exit EnergyCAP.
4. Locate and download the required SQL scripts to be run against your database (see Appendix A for download instructions). You will be upgrading to the latest database version, which is DB60. If you are currently using rel 6.0 and DB57, you need one upgrade script: **upgrade57to60.sql**. If you are using rel 5.1 or earlier, see Appendix A for file names of additional upgrade scripts.
5. Back up your current database and label it as the last backup of DB57 (or DB52 or 49, whichever case applies). All users should exit the EnergyCAP software program.
6. Run the **upgrade57to60.sql** script on your database using an SQL management tool. **IMPORTANT:** If you are currently at a release earlier than 6.0 and database earlier than DB57, you will run more than one script. Run the earlier script(s) **FIRST**, in numerical sequence from the lower DB number to DB60. This process will usually take from one to ten minutes, depending upon database size.
7. A number of SQL messages during the upgrade process is normal and anticipated. It is advisable to make a copy of any SQL messages received in case diagnostics are necessary.

If the completion message says, “Query executed successfully.”, then the database upgrade was successful. If the message says the query was completed with errors, you should restore your backup copy of the database and contact EnergyCAP, Inc. Technical Support for further assistance. Be sure to provide a copy of the error messages.

EnergyCAP Enterprise Installation Procedure

Install the new EnergyCAP software application on user workstations using the Setup file provided:

1. Download the EnergyCAP 6.1SP1 Setup file per the instructions in Appendix A.
2. Double-click the Setup file to run the installation.
3. Follow the prompts to move forward in the installation wizard.
 - a. You can install rel 6.1SP1 over top of the prior release (i.e. in the same program folder).
 - b. Accept setup default options. The database engine option should remain unchecked.
 - c. Click **Finish**... You will receive a prompt to reboot your system when done. Click **OK** to restart the computer.
2. After your PC has finished rebooting, launch EnergyCAP.
3. Login via your usual procedure. The new EnergyCAP release should load as normal.
4. Click **Help/About** to verify that you are using the most current release. The version number of EnergyCAP 6.1SP1 is **6.1.60.xx**, where xx is the latest build (60 or higher).

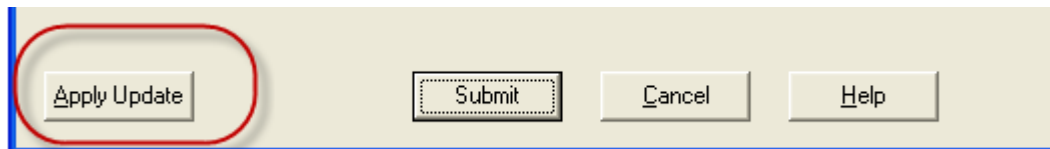
This concludes the EnergyCAP Installation Procedure.

Post-Installation Actions

These Post-Installation Actions perform various database maintenance tasks and must be completed ONCE from ONE workstation. There is no need to perform these tasks from EACH workstation.

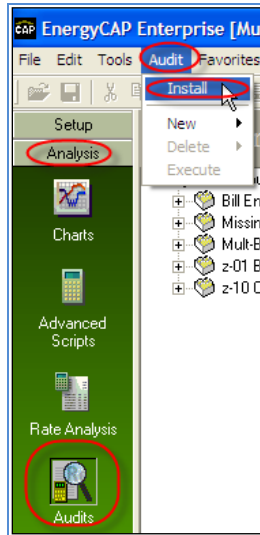
(If upgrading from Release 5.x, see Appendix B)

1. **ENERGY STAR Building Attributes:** If you are using the EnergyCAP – ENERGY STAR interface, you must update the ENERGY STAR building attribute schema as follows:
 - a. Login to EnergyCAP. You must have ENERGY STAR submittal permission (if you do, the ENERGY STAR shortcut button in upper right of Facility Manager will be blue.)
 - b. Click **Setup>Facilities** to open the **Facility Manager**.
 - c. Click the **ENERGY STAR** shortcut button from the Facility Manager (upper right). The **ENERGY STAR Interface** window will open.
 - d. Click the **Apply Upgrade** button (lower left corner of window). EnergyCAP will attempt to download the latest schema. If the upgrade was successful, the ‘Apply Upgrade’ button will disappear, and a message will inform you that the update has been successful. (If the Apply Upgrade button does not appear, it means that either no update applies to you at this time, or you do not have an Internet connection and therefore the system cannot verify the need for the update.)

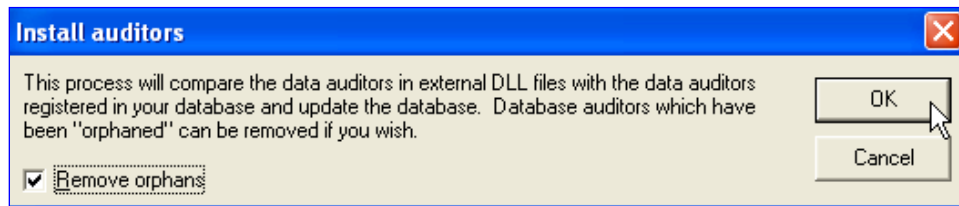


- e. If the building attribute update has affected the required data fields for any buildings that you have already configured for ENERGY STAR submittal, you will have to edit those buildings’ properties to comply with the latest data requirements.

- 2. **AUDIT UPDATES:** Update your audits using this procedure.
 - a. From EnergyCAP, click **Analysis>Audits**. The Audit Manager will be displayed.
 - b. Click **Audit>Install**.



The **Install Auditors** window will open. Click OK.



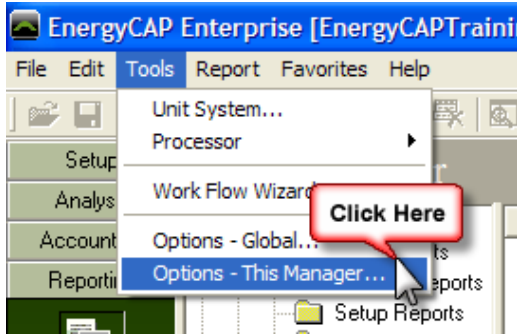
- 3. **REPORT UPDATES:** Install the latest reports. We have modified EVERY report, so installing the latest reports is important!

It is important to determine the final location(s) for the downloaded report files. This will depend on how reports are managed -- centrally or locally.

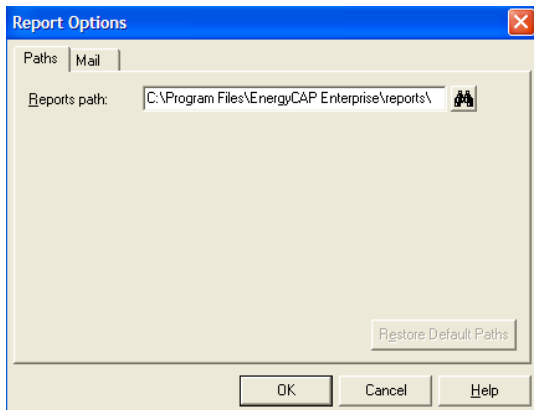
The latest EnergyCAP report files (Crystal Reports .RPT files) must be downloaded from the EnergyCAP website and installed into the user report folder(s). Some or all users may (1) share report files on a common network drive and (2) some or all users may maintain private report files on their local hard drive(s).

To determine the location of report files for the current user, navigate to the Report Manager (**Reporting>Reports**) in EnergyCAP and click **Tools>Options>This Manager** as shown below.

Upgrade Installation Instructions EnergyCAP® Enterprise 6.1SP1

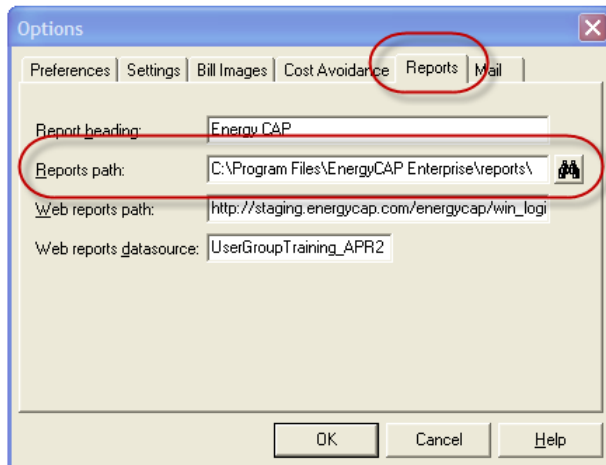


The **Report Options** window will open.



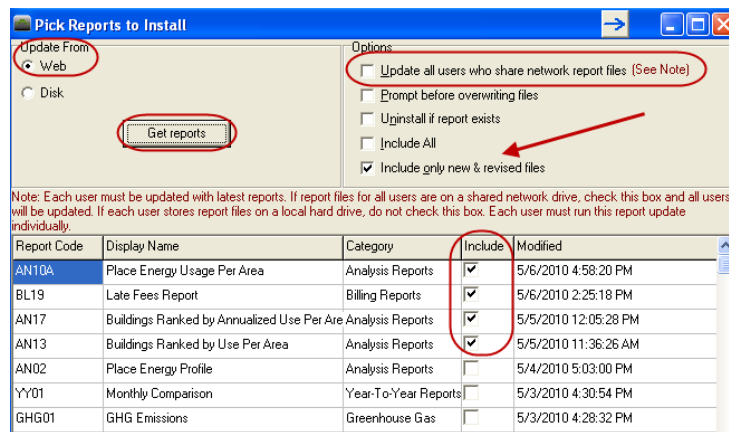
Click the **Paths** tab to view the individual User report path.

To see the GLOBAL report default location, click **Tools>Options>Global**. The Options window will open. Then click the Reports tab to display the current **Reports path**.



If all users access reports on a shared network drive, you will simply install the reports once for all users (see below). If some or all users access reports via local hard drives, you will have to install reports multiple times from multiple workstations.

- a. To download and install the reports in EnergyCAP, navigate to the Report Manager (**Reporting>Reports**). (Note: If there is no Reports button available after clicking the Reporting menu bar, this means you are connected to the database via an Internet connection. You must connect to the database via a network connection in order to update reports.)
- b. Click **Update Reports** shortcut button. The Pick Reports to Install window will open.
- c. Select the Update from **Web** radio button; then click the **Get Reports** button.

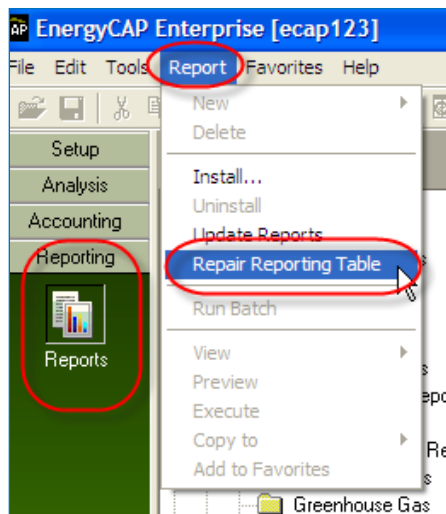


- d. Wait for file download – it may take a few minutes. When ready, the screen will be populated with report names.
- e. **This step is important - be sure the checkbox settings are correct! First, and most importantly, determine if you need to check the Update all users checkbox (see circled item above):**
 - i. **If your users access reports on a shared network folder, be sure to check the Update All Users checkbox.** This will install the reports for all users at once. You do NOT have to run the Update again for each user.
 - ii. **If you don't check the Update All Users checkbox (either because you failed to do so or because users access reports via local hard drives) you will have to run this process over again for each user.**
- f. Note that the reports are listed in order by Modified date, latest at the top. The installer will automatically Include only new and revised reports.
- g. Click **OK** to begin the report installation process. New and updated report RPT files will be installed into the Reports Path *and* the reports will be registered in the database for designated user(s) *and* report stored procedures will be updated in the database. **Important – This process may take a long time if you have many users to update.**

- h. Click **Close** to close the **Log** window.

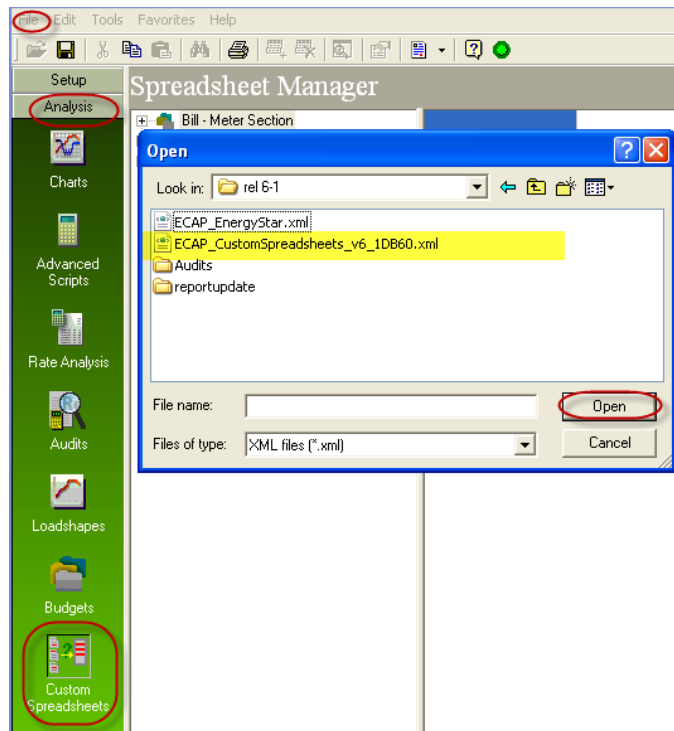
Reminder! If all users are accessing the same common Reports Path on a shared network folder, no further action is required (assuming you properly checked the **Update all users** checkbox). However, if any users access reports from a Reports folder on their local hard drive, the reports installation must be repeated on these workstations with **Update all users** unchecked.

- i. Reports are updated monthly as bugs are resolved. A new report ZIP file is posted for download/updating in months that report changes were made. To keep up to date on what reports have been modified from month to month, please see the online list at <http://www.energycap.com/reportupdates>
- j. One final step: From the Report Manager in EnergyCAP, click the **Repair Reporting Table** menu item. This option automatically repairs any report table problems (called the BillAccountMeter table in SQL) that might result in billing data being omitted from PowerViews, meter history lists or reports. The **Repair Reporting Table** operation can be performed as often as you like; there are no negative consequences.



4. **CUSTOM SPREADSHEET UPDATES:** To update custom spreadsheets:

- a. Click **Analysis>Custom Spreadsheets**. The Spreadsheet Manager will be displayed.
- b. Click **File>Import**. The **Open** window will be displayed.
- c. Navigate to the EnergyCAP installation folder (usually **C:/Program Files/EnergyCAP Enterprise**).
- d. Click to select the **ECAP_CustomSpreadsheets_v6_1_DB60.xml** file.

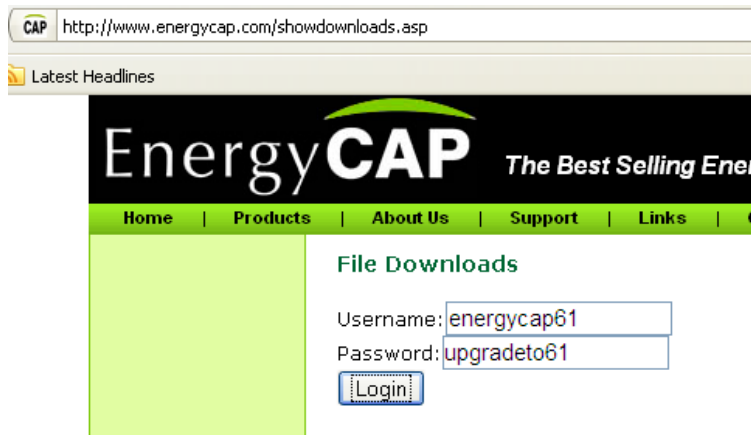


- e. Click **Open**. The Spreadsheet Manager will be updated with new filter and format options.

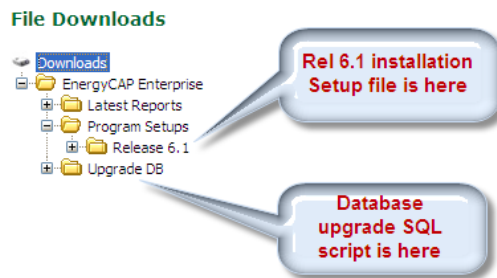
The upgrade has been completed. There are many new features and updates in EnergyCAP release 6.1SP1. We recommend that you read the Release 6.1 and Service Pack 1 **Release Notes** to familiarize yourself with the new functionality.

APPENDIX A: File Download Procedure

1. Open your web browser and navigate to www.energycap.com/showdownloads.asp
2. Input the Username and Password indicated below into the fields provided. Then click **Login**. A download folder list will become visible.



3. Expand the download folder list by clicking the 'plus' (+) sign.



4. Click on the **ece_setup6-1-60-xx.exe** file in the Release 6.1 folder. The **File Download** window will open. (**xx** will be build 60 or higher)
5. Click the **Save** button and choose a location on your hard drive for the installation file.
6. Repeat the download process for any PDF files in the same folder (contains additional information on the new release).
7. Browse to the **Upgrade DB** folder. Repeat the download process for the necessary SQL script(s) to upgrade your database from its current version to the latest version. You can verify your current database version by clicking **Help – About** from your existing EnergyCAP Enterprise software program. In the **About** window, you'll see the database shown in brackets below **EnergyCAP Enterprise**, like this: [DB 52] or [DB 57]. (NOTE to Database Administrators: You can also verify the current EnergyCAP database version in the **Version**

Upgrade Installation Instructions EnergyCAP® Enterprise 6.1SP1



field of table **SystemData**.)

If upgrading from release 6.0, including SP1 or SP2, you will need:

- upgrade57to60.sql

If upgrading from Rel. 5.1 you **may** need upgrade49to52.sql (check the HELP/About box in EnergyCAP to verify your current database version) and you will definitely need:

- upgrade52to57.sql
- upgrade57to60.sql

If upgrading from Rel. 5.0, check the HELP/About box in EnergyCAP to verify your current database version. The Database (DB) number is listed under the program name. Depending on the DB number, you may need:

- upgrade47to49.sql OR upgrade48to49.sql
- upgrade49to52.sql
- upgrade52to57.sql
- upgrade57to60.sql

Contact EnergyCAP, Inc. for upgrade assistance if the DB number is lower than 49.

8. Verify that you have downloaded the EnergyCAP setup file AND any database upgrade scripts you will need.

APPENDIX B: Additional Steps for Release 5.x Updates

1. **ADO CONNECTION UPDATE.** EnergyCAP, Inc. strongly recommends that all WEB and CATALOG SERVICE users update their Catalog Service connection string to ADO (Activex Data Objects) for each EnergyCAP database. Use the following example as a guide in creating the new ADO string:

```
Provider=SQLOLEDB.1;Password=e2isnotis;User ID=esuser;Initial  
Catalog=my_energycap_database;Data Source=devdbwin01;
```

REPLACE the bold items with your information.

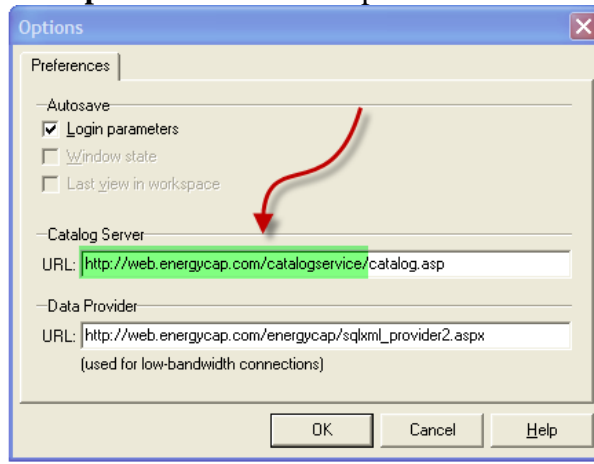
USER ID = DATABASE USER ID (used to connect to EnergyCAP db)
PASSWORD = DATABASE USER ID PASSWORD
CATALOG = NAME OF ENERGYCAP DATABASE
DATASOURCE = DATABASE SERVER NAME

Using Internet Explorer, Login to your Catalog Server.

- i. To determine your catalog server location (URL), launch EnergyCAP and click on the Globe icon from the Login window.



The **Options** window will open.



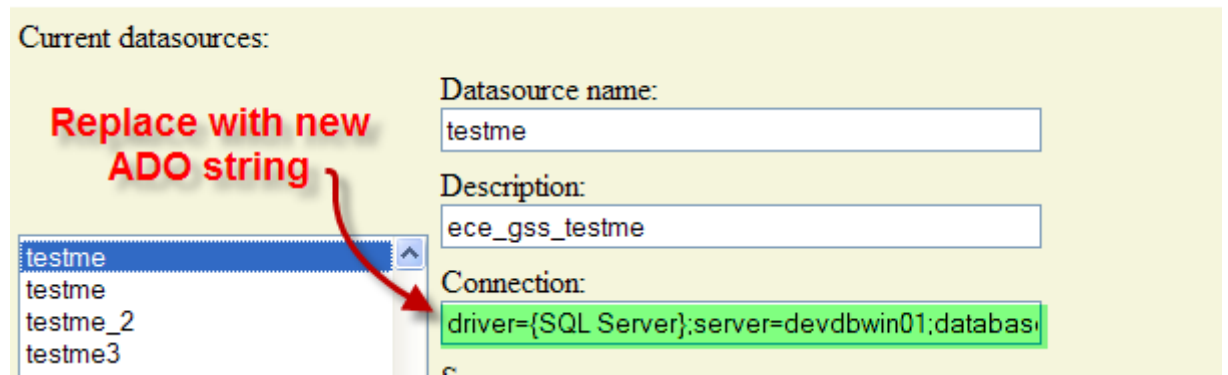
- ii. Use the highlighted string (it will be DIFFERENT from the example above) as the first portion of your catalog server URL.

- iii. After the highlighted string, ADD **admin.asp**. In this example the completed **catalog server string (URL)** would be:

<http://web.energycap.com/catalogservice/admin.asp>

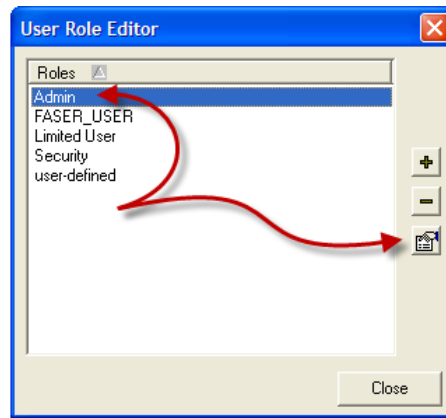
From your **Catalog Service Setup** browser window, select the EnergyCAP database from your current datasources, and replace the existing **Connection:** information with the new ADO string.

Catalog Service Setup

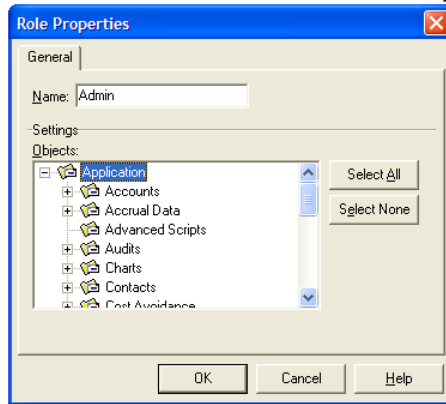


Repeat this procedure for every upgraded EnergyCAP database in your catalog server.

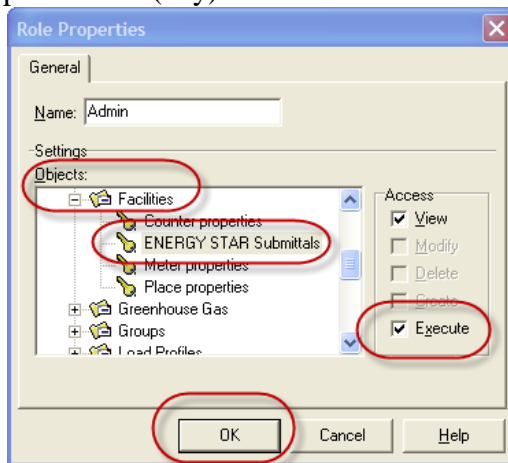
- 2. **ENERGY STAR PERMISSIONS:** Upon upgrading from EnergyCAP 5.x, ENERGY STAR submittals will be disabled for all users. The new permission, "execute", will have to be granted for all users authorized to submit building data to the EPA for an ENERGY STAR rating. Assign User Permissions as follows:
 - a. Click **Setup>Users** to open the **User Manager**. If Permission will be granted to a user **ROLE**:
 - i. Click the User Roles button to open the User Role Editor.
 - ii. Click the **User Role** to be modified.



- iii. Click the **Edit** icon. The **Role Properties** window will open.



- iv. Expand the list of Application Objects and scroll down to **Facilities**.
- v. Expand the **Facilities** object and select the **ENERGY STAR Submittals** permission (key).



- vi. Click the **Execute** checkbox to enable ENERGY STAR submittals for that user role. Then click **OK** to save your changes and close the **Role Properties** window.
- vii. EnergyCAP will prompt you to apply the changes to existing users. Click **Yes** to apply changes.

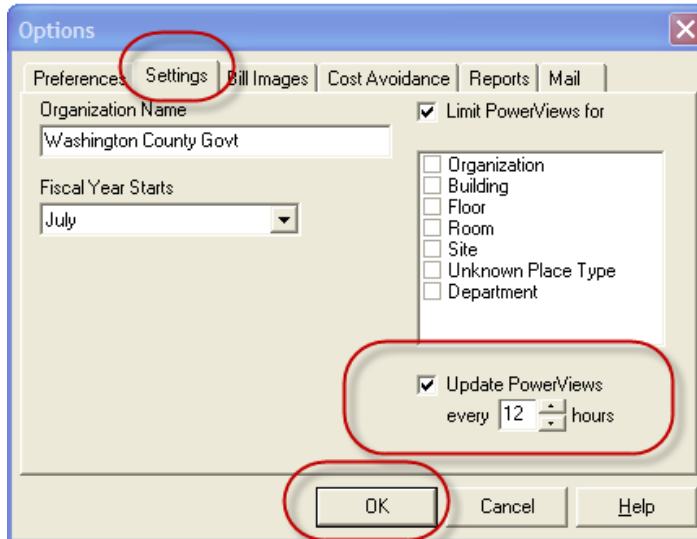
- b. If Permissions will be granted to a single user and NOT a user role:
 - i. Right-click the **User Name** from the User Manager and select **Properties** from the popup menu. The **User Properties** window will open.
 - ii. Click the **Permissions** tab.
 - iii. Grant the new permission, using the same procedure outlined for **User Roles** (iv-vi, above).
 - iv. When done, click **OK** to save your changes.

3. PowerViews™ STAGING TABLE UPDATES:

Beginning in EnergyCAP Release 6.0, the PowerViews are driven by staging tables which are periodically updated instead of being dynamically maintained. The design eliminates delays in PowerViews presentment, especially for larger databases.

If this has not been done previously (for Rel. 6.0), the database administrator must choose one of two options for staging table updates:

- a. An **Update PowerViews** option, accessible from the **Options** window (**Tools>Options-Global, Settings** tab) in EnergyCAP, provides for scheduling of PowerViews staging table updates upon **user login** when the PowerViews time parameters have been satisfied.



In the example above, the PowerViews staging tables will be updated with current database information upon the next user login that occurs at least 12 hours later than the last staging table update.

- b. A second staging table update option is available and *highly recommended* if you have a large database (over 1,000 utility accounts): An SQL Server management task can be created to accomplish the staging table updates at a convenient 'down' time in company operations. The SQL scheduled task must run the following three (3) stored procedures against the database, in the sequence indicated:

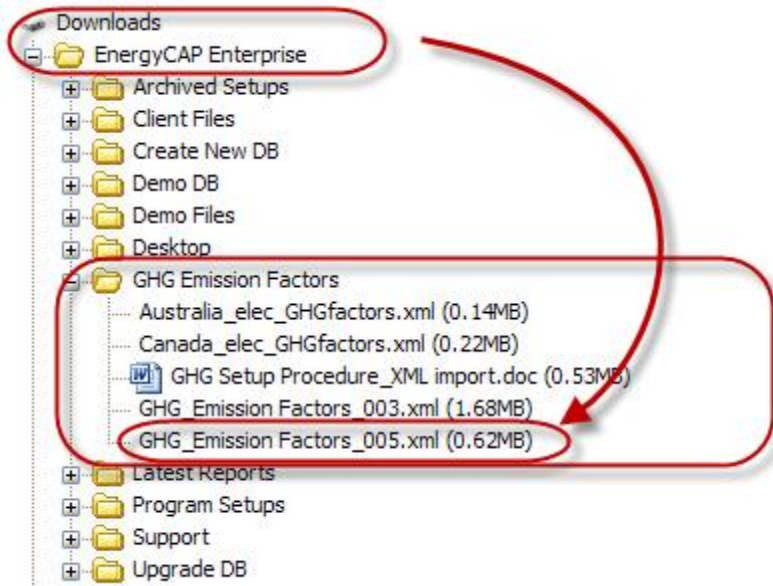
CB2

GenerateBillSummaryTables

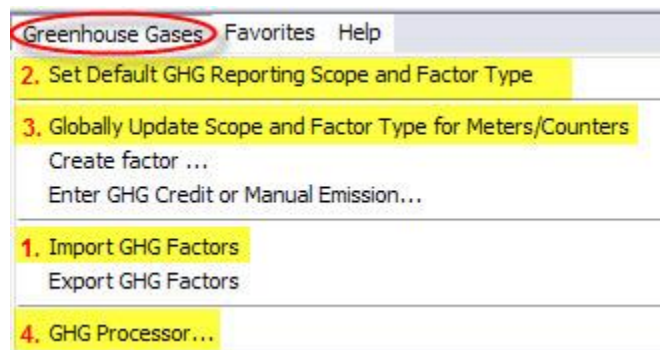
GenerateGHGSummaryTables

IMPORTANT NOTE: If this option is chosen, the **Update PowerViews** checkbox (see graphic, above) should be left BLANK to prevent staging table updates at other times.

4. **GREENHOUSE GAS TRACKING FACTOR UPDATES:** For those users who have purchased the Greenhouse Gas Tracking module for EnergyCAP and have not yet updated to the current set of emission factors (**GHG_Emission Factors_005.xml**), it is necessary to:
 - a. Download the most current Greenhouse Gas (GHG) conversion factors from the EnergyCAP website.
The site address is: <http://www.energycap.com/showdownloads.asp>
The Username and Password were provided when the GHG module was purchased.
The file is **GHG_Emission Factors_005.xml**



- b. After downloading the file to your hard drive, there are several steps that must be performed to ensure that the updated factors have been imported and linked to the meters in the EnergyCAP database.
- c. From the **Facility Manager (Setup>Facilities)**, click **Greenhouse Gases** in the Top Menu



- i. Select **Import GHG Factors** from the submenu.
 - a. The **Open** window will appear. Browse to the location of the downloaded GHG file and click to select it. Then click **Open**. The new factors will be imported.
- ii. Select **Set Default GHG Reporting Scope and Factor Type** from the submenu.
 - a. The purpose of the Default GHG Reporting Scope and Factor Type settings is to assign these settings to new meters being added to the database.
- iii. Select **Globally Update Scope and Factor Type for Meters/Counters** from the submenu.
 - a. Verify that the **Reporting Scope** and **Factor Type** settings are correct for each commodity type.

- b. Click the **Update Scope** and the **Update Factor Type** check boxes located adjacent to each of the select Scope and Factor Types. This tells the processor which fields should be updated.
- c. Once the settings are verified and the Update checkboxes are checked, click on the **Update** button in the lower right corner of the window.
- iv. Select **GHG Processor** from the submenu.
 - a. The **Assign Factors and Calculate GHG Emission** window will open.
 - b. Use the settings indicated below (Process All Meters).
 - c. Then click the **Apply** button in the lower center section of the window.
 - d. Running the GHG processor ensures that the newly imported updated GHG factors are assigned to the meters and then used to calculate the GHG Emissions table in the database.

