



CAPS

Computer Aided Product
Selection Program

Reducing HVAC System Design Time By Using CAPS (Computer Aided Product Selection)

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For installation assistance, please select from the following options:

- Email: CAPS@greenheck.com
- Phone: 855.886.8324
- Live Chat, located under the Software tab on greenheck.com

Reducing HVAC System Design Time By Using CAPS (Computer Aided Product Selection)

Improve and Increase Your Design Throughput and Productivity with CAPS

Greenheck's Computer Aided Selection Program (CAPS) includes the widest product offering in the industry including fans, dampers, louvers, kitchen hood systems, make-up air units, energy recovery, laboratory exhaust.

CAPS allows you to:

- Size
- Select
- Apply
- Specify
- Schedule
- Produce Specifications



*CAPS includes over 600 unique models
of HVAC equipment.*

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Easy to Use

- User guides for all levels
- System guides
- Helpful wizards
- Convenient comparisons
- Multiple search options
- Payback analysis
- Automatic updates
- Resource links
- Create and export up-to-date, accurate equipment schedules
- No cost (It's free!)

Collaboration Tool

- Create your Greenheck equipment files for projects
- Share files with your local Greenheck representative
- Provide accurate and detailed product information to architects and building owners

Dynamic Revit® and AutoCAD® Content

- The only HVAC software selection program in the industry to offer “As Configured” Revit® and AutoCAD® drawings
- Dynamic content makes design changes quicker and easier than any other program
- Saves designers hours of time when updating drawings

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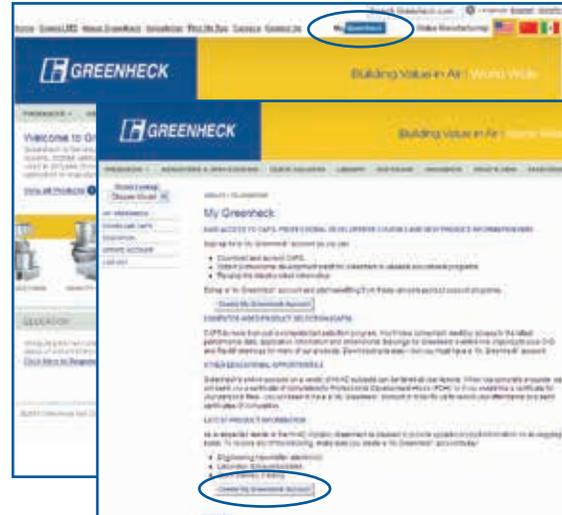
1. Create a My Greenheck Account

Registration (Sign-in)

If you do not have a My Greenheck Account, your first step is to create an account.

Go to www.greenheck.com, click on My Greenheck. You'll be directed to the My Greenheck page. Click on the "Create My Greenheck Account" link to create a new account.

Once you have completed the form, click "Submit".

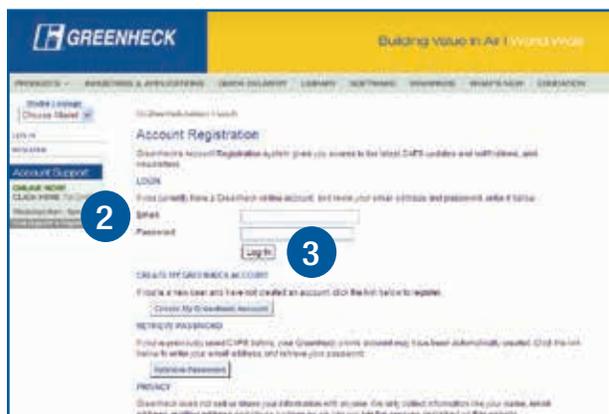
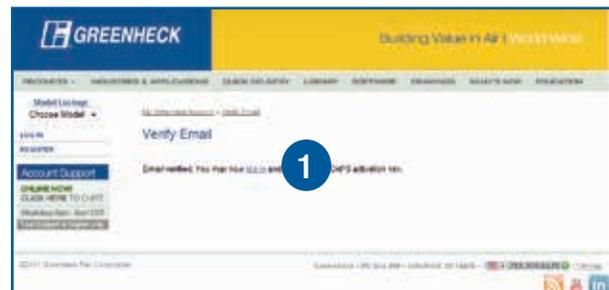


Verification Email

Once you have created your account, you will receive an email containing a link to activate your account.

If you do not receive an email within 15 minutes, please email mygreenheck@greenheck.com stating that you have not received your registration verification email. We will manually activate your account. This could occur if your spam filter blocked the message.

1. Click the hyperlink in the verification email to activate your account
2. Click the blue underlined link (log in) within the email message.
3. Enter your email address and password. Click "Log In".



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2. Downloading and Installing CAPS

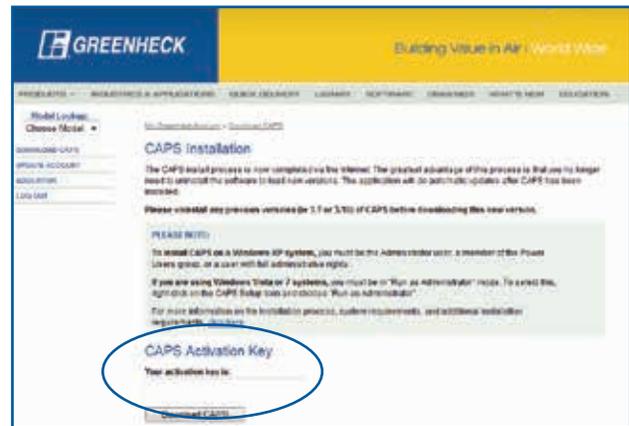
Download CAPS

Once you are logged into your software account, click the “Download CAPS” button to download the application.



Activation Key

Your activation key will be displayed on the download page. Copy or write down this key, you will need it the first time you run CAPS.



Select “Download CAPS”.

If you forget the activation key, log back in to your account and visit the download page to view it.

Save the Download File

You must SAVE the file. It will not install properly if you select Run. Save the file to your desktop (the program default). Once the download is complete, close your browser. Do NOT run from the Download pop-up.



Run the Installation

Locate the CAPS set-up file saved on your desktop.

To install on a **Windows® System:** You must have Administrator rights. Double-click on the set-up file. The CAPS set-up program will automatically begin to run. If an error appears stating that you do not have Administrator rights, please contact your IT department.



On Windows® 7, Windows® 8 and Windows® 10 systems: You may see the User Account Control prompt asking you to allow changes to your computer. If so, click Yes.

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Alternative Installation Method: *If you are an IT Administrator or you don't have admin rights, we have an MSI based installation package available; please contact the CAPS Customer Support group to obtain it. The MSI installation package allows the following:*

- a. Allows for server to stations mass deployment ability
- b. Allows CAPS to run after a failed update (because user doesn't have admin rights)
- c. Allows for installation and operation without internet access

The Install Sequence

A series of questions will appear as you go through the install process. The program will default to the most common answers so you may click "Next" through them.

Read through the License Agreement and check the box to proceed.

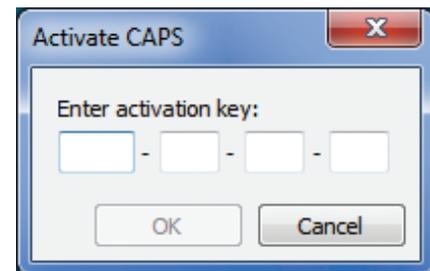
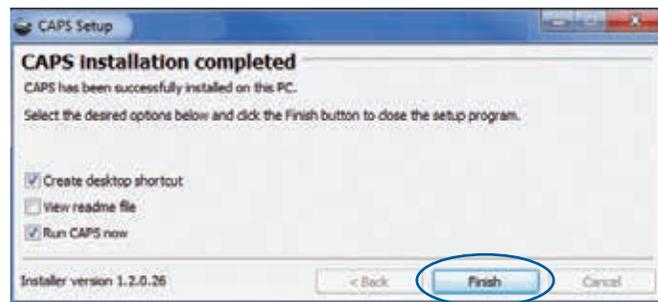
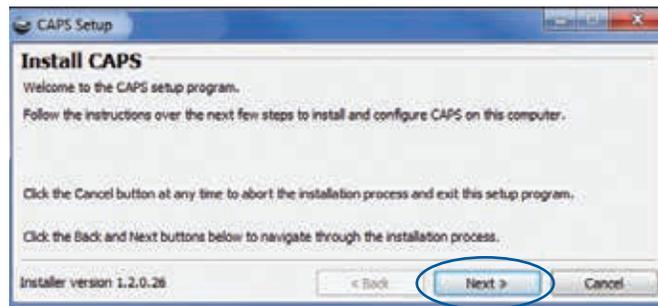
You may be prompted to install missing prerequisites. If prompted, select the Download and Install Now button. (There may be some additional user interaction required.)

When the install sequence is complete, this screen will display. Click "Finish".

The first time CAPS is launched you will be prompted to enter the activation key. This is the only time you will need to enter the activation key.

To run the program, click on the CAPS icon on your desktop.

When the installation is complete and CAPS is running properly on your PC, you may delete the setup.exe file from your desktop. The set-up file is only needed for the initial CAPS installation. It is not needed to run the CAPS application itself.



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3. Running CAPS

LOCALE tab

The first time you run CAPS, you will need to set your default Location, Design Conditions and Costs. These set the defaults for each new job you create.

1. Location – Country/Region, State/Province, and City sets the Power Frequency.
2. Elevation is based on ASHRAE 2009 standards. The default elevation can be overridden. Elevation affects fan and coil performance.
3. The Dry/Wet Bulb Temperatures are also based on ASHRAE 2009 standards. The default temperatures can be overridden. Temperature settings affect coil performance.
4. Energy costs are for calculating operating costs, energy savings, and payback amounts. The values can be changed from the default for your specific area.

PROPERTIES tab

5. Display, choose “U.S.” or “Custom” measurement units for specific fields (Dimensions, Elevation, Weight, etc.).
6. Preferences, enable entry of special tagging text for the product models.

PREFERENCES tab

7. Sizing grid defaults, sets the visible fan performance columns. Fan selection defaults, determines the sizing of the motor.

Once you click OK, the User Settings Preferences tab will appear. Enter your email address and set the Default Job File Location.

8. A valid email address is required to run CAPS.
9. Default Job Location, sets the location where your job files are saved. You may select to browse for a different location.

Job Template
Locale Properties Preferences

1 Location
Country/Region: United States
State/Province: WI
City: Wausau Municipal Airport
Power: 60 Cycle

2 Design Conditions
Elevation (ft): 1,198

3 Outdoor Summer Dry Bulb Temperature (F): 88.1
Outdoor Summer Wet Bulb Temperature (F): 74.5
Outdoor Winter Dry Bulb Temperature (F): -13.6

4 Costs
A/C (per ton): \$650
Electric (per kWh): \$0.08

Job Template
Locale Properties Preferences

5 Display
Measurement Units: US

6 Preferences
Damper / Louver / Gravity Ventilator / Roof Out
 Enter Line Item Tag

Job Template
Locale Properties Preferences

7 Fan
Sizing grid defaults
 Show Minimum Fan Speed
 Show Static Efficiency
 Show Outlet Velocity
 Show Tip Speed
 Show Wheel Diameter
 Show Moment of Inertia
 Show Roof / Wall Openings
 Show Octave Bands (dB)
 Show Sound Power (LWA)
 Show Loudness (Series)

7 Fan selection defaults
Allow motor to run into the Service Factor: No Preference

User Settings
Preferences

8 Information
Email Address

9 Default job location
C:\Users\meyer\Documents\CAPS Jobs

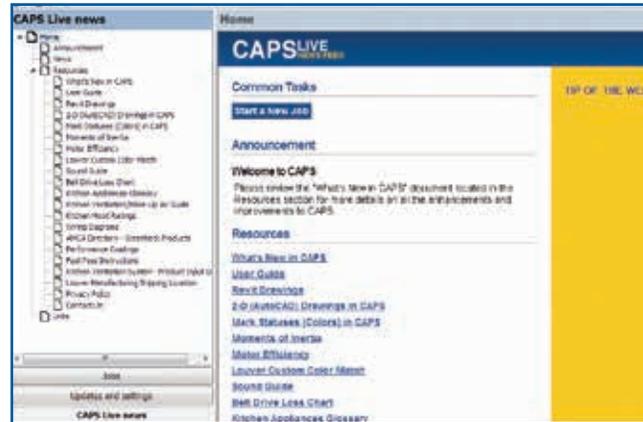
Preferences
 Launch Explorer After Generating PDFs
 Use Enter as Tab
Number of recent jobs to list at startup: 25

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CAPS Live News

When you open CAPS, the CAPS Live News page displays. You can read through the news items and information to help you. It includes:

- News — important Industry and Greenheck changes/news
- Resources — user's guide, technical data, and support contacts (Contact Us)
- Links — useful web links such as Greenheck.com and AMCA International.



Starting Out

To select a product, click on the “Start a New Job” button on the CAPS Live News page.



You can also start a new job by clicking on the Jobs button (found on the lower left corner of the screen). Then, to create a new job, click on the New Job icon.

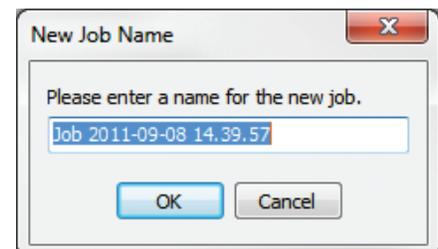


What is a Job?

A job is created when you choose products and configure them. CAPS stores your choices using that job name so the job can be retrieved at a later date, without having to make a new selection.

Creating a New Job

Before a product selection can be made in CAPS, a new job file must be created. You can accept the default name or enter your own. Click OK to save.



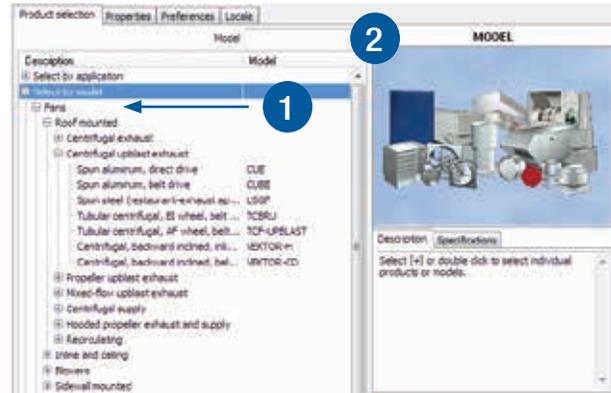
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Selecting a Product

Once you have a Job started, the Product Selection screen appears. There are four ways to select a product.

1. Model

This method is a decision tree which displays all the products. Click on the + next to the Product Family to expand the list. Continue expanding until the Models appear.



2. Model name

If you already know the model name, find the "Model" text box, type the model name and the model will appear.



3. Application

This method is like a wizard that guides you through the selection process by applying filtering criteria to determine which product(s) will work best for you.

To begin, select a Product Family. Then choose from the selection criteria to narrow the Search Results. For many products, the Search Results window includes a Relative Cost guide to help you with your product decision.

4. Manufacturer

This method allows you to select a competing model and the Greenheck equivalent model.

First select a Manufacturer, then find the competitor's Model Number. The Search Results screen will display the equivalent Greenheck model number.



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Description and Specification Tabs

Once you have highlighted a model number in the Product Selection area, a picture, description, specifications and documents for that model appear.

1. Description — a brief description about the product is given along with an image.
2. Documents — the documents are reference material which can assist you in the selection process.
3. Specifications — you can copy/paste the specifications for your job specifications. Highlight the specification text you would like to copy, then right-click, select Copy and then paste the text directly into your job specifications.

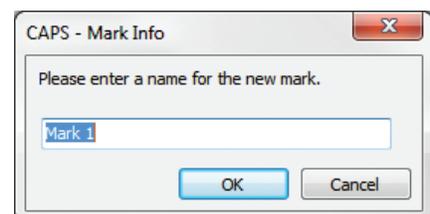
Once you have the model you want selected, double-click it or click “Continue”.



Configuring Your Product

Mark Name

Once you have selected a model, type in the mark name. By default it will be called Mark 1. To rename it, type in the new name, click OK.



What is a Mark?

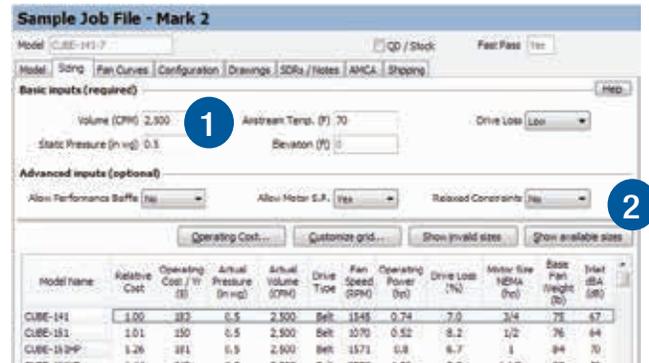
A mark is an identifier that ties your selection with its location within the building plans. Example, EF-1.

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Making a Selection — Sizing Tab

In this example, we will make a fan selection.

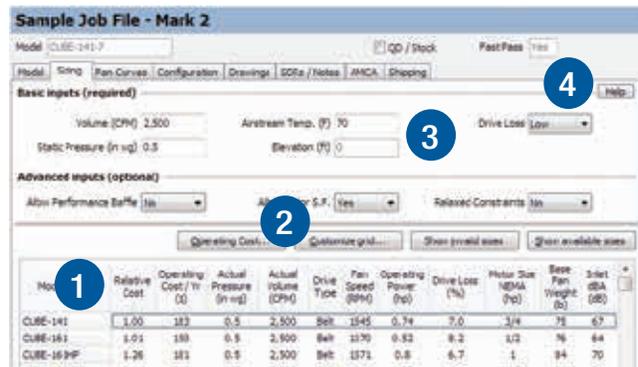
1. Enter your basic performance characteristics (Volume, Pressure, Temp), etc.
2. Select the Show available sizes button.



Comparing Selections — Sizing Tab

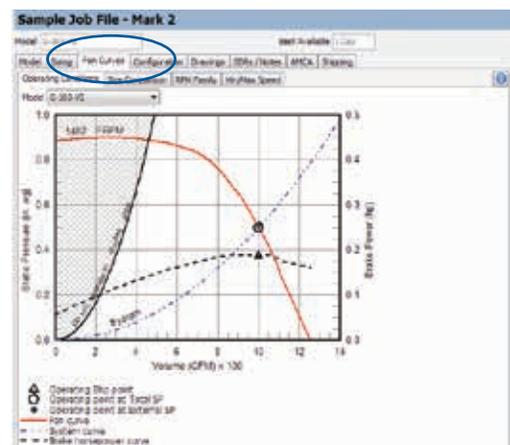
The sizes that meet your entered performance will display in the grid.

1. You can compare and re-sort the sizes by clicking the column heading.
2. For additional comparison columns, you can select the “Customize grid” button.
3. Advanced Performance Corrections are optional and can be used to fine tune your performance. Everything on this tab affects the fan’s performance.
4. The Help button explains each correction.



Fan Curves

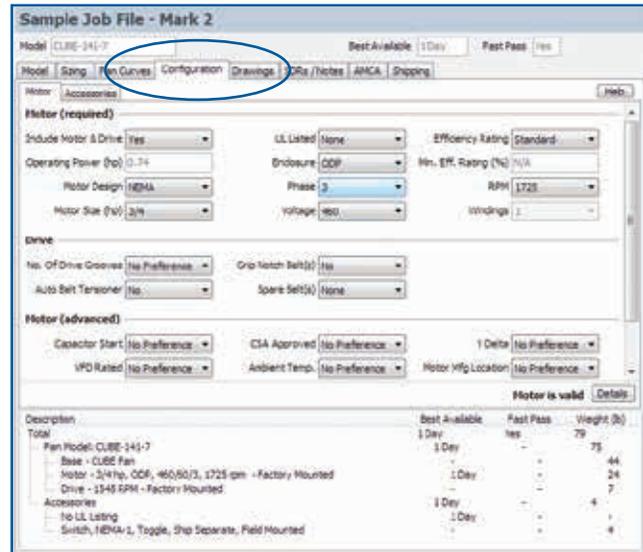
Next, select the Fan Curves tab on the top of the screen. You can review the fan curve here. There are other sub-tabs to choose from such as RPM Family, Min/Max Speed, etc.



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Configuration Tab

Select the Configuration tab. This tab is used to further configure the options and accessories. The program defaults to the most common selections. You can change these selections.



Drawings

The Drawings tab displays a representative drawing. For information on CAD drawings, see page 15.

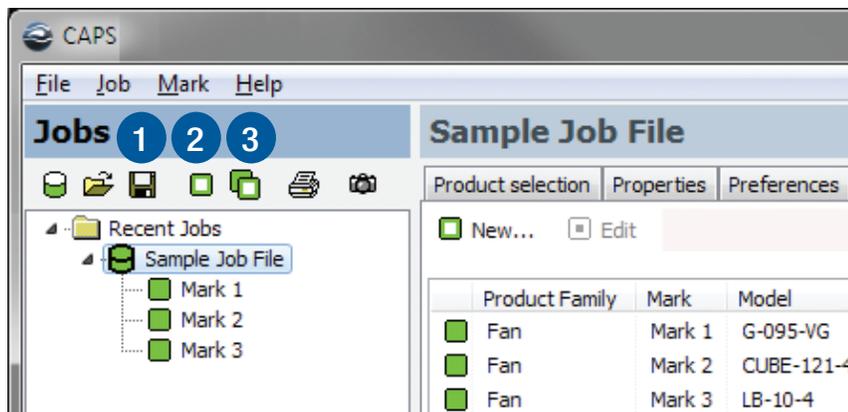
Saving and Starting Another Selection

Saving

1. Once your selection is complete, save the job by selecting the save button/icon in the upper left corner of the screen.

Starting a new selection

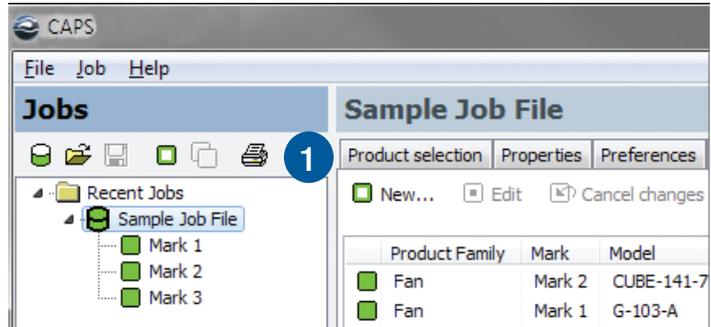
2. To start a new selection for the same job, select the New Mark icon and the process starts all over again.
3. To start new a selection of the same model with the same options/accessories, select this icon.



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Printing Reports

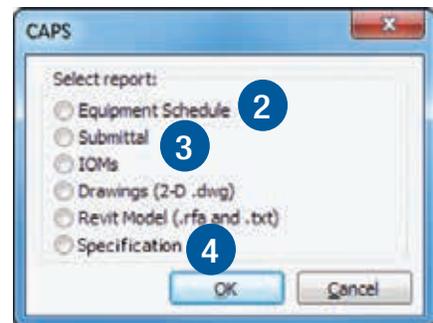
1. After you have completed your product selection(s) and saved your job, you can print a report. There are four types of reports: Equipment Schedule, Submittal, Drawings, and Revit Drawing. We will discuss the first two in this section.



2. Equipment Schedule Report

There are lots of printing options to choose from, please review them and make your selections appropriately. A few common selections are:

- Destination: print to a printer, pdf file for an electronic copy, or you can print to a .csv file which can easily be imported to Microsoft® Excel® or AutoCAD®.
- Measurement Units: change the units of measure from U.S. to metric (Custom).
- Marks Tab: select the mark or marks you want to print



3. Submittal Report

There are lots of options to choose from, please review them and make your selections appropriately. A few common selections are:

- Destination: print to a printer, or pdf file for an electronic copy
- Measurement Units: change the units of measure from U.S. to Custom
- Marks Tab: select the mark or marks you want to print
- Mark Sort Order: selected the order in which you want to print the marks
- Optional Pages: select the level of detail you want to print

4. Specification Generation

This report option will generate a 'dynamic' specification based on the configured and saved selection from CAPS along with options and accessories.

CAPS will create a new folder where the job file was saved. Title the new folder with the CAPS job title name and create Microsoft® Word® formatted files for each saved mark from the job.

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AutoCAD® Drawings and Revit® Content

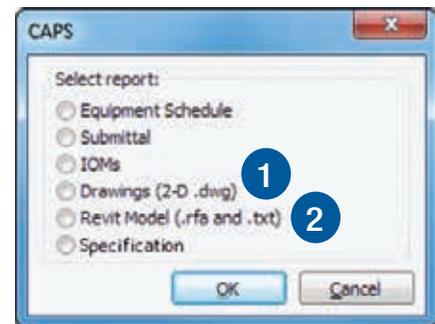
1. Drawings

2-D CAD drawings are available from CAPS in a .dwg format per each mark selected. Make sure you are at the job level and select the Reports icon, then select Drawings, select the mark(s) you want to generate drawings for. Click OK. Your drawings will be located in the folder where the Job File is stored.

CAD availability of each product model in CAPS is shown on our website at <http://www.greenheck.com/drawings/>

2. Revit® Content

Revit families are available from CAPS. Drawing content is dynamically generated per each mark's configuration. Make sure you are at the job level and select the Reports icon, select Revit Drawing, then select the mark(s) you want to generate content for. Click OK. The Content Family (.rfa), specific configuration (.txt), and Summary (.csv) files are located in the folder where the Job File is stored. For full details, including the proper loading procedure, please see "Revit Drawings" under Resources on the CAPS Live Page.



A video demonstration of how to use and update dynamic Revit content from Greenheck's Computer Aided Product Selection program (CAPS) is found on Greenheck's YouTube channel at <https://www.youtube.com/watch?v=t45CBEivkJA>

Updates and Settings

If you would like to update your settings or default job info, click the Updates and Settings button in the lower left corner of the screen.

