

CATALYST



Organizing for Insights: Grouping Sites and Meters for Reporting and Benchmarking



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Have questions?

Ask them in **Sched chat** on the app!

Agenda



- ✓ What are groups?
- ✓ Where do I find groups?
- ✓ Benchmarks
- ✓ Creating Groups
- ✓ Custom Fields
- ✓ Wrap-up: Q&A and Survey

What are groups?

What are groups?

Groups help you compare like sites or meters using benchmarks.

Create your own groups based on attributes important to you.

Use groups as a filter in dashboards, reports, and bill lists.

Groups & Benchmarks

Site Groups

- > HVAC Types
- > Place Primary Use Auto-Group
- > Reporting Groups
- > University Facilities

Meter Groups

- > Commodity Auto-Group
- > Meter Primary Use Auto-Group
- > Sustainability Tracking
- > University Meter Groups

Site Groups

Site group	Members	Type
▼ HVAC TYPES		
Buildings with Boilers	0	Asset
Electric Only Facilities (No Gas)	4	Meter
▼ PLACE PRIMARY USE AUTO-GROUP		
Antenna/Communications	12	Asset
General Office	9	Asset
Mixed Use Property	5	Asset
Other	3	Asset

Where do I find groups?

Pop Quiz

Which objects can be used to populate groups?

- **Sites**
- **Meters**

What are two ways to manage group membership?

Automatic Groups:

Membership is automatically assigned based on criteria set by user

Manual Groups:

You can select the members of the group individually, one-by-one

Custom Fields

Custom fields

Custom fields allow you to track additional fields that are not native to the Utility Management app.

Custom fields are available for:

- Sites
- Meters
- Accounts
- Channels
- Vendors
- Rate Schedules

Pop Quiz

Which custom fields can be used to create site or meter groups?

- Site Custom Fields
- Meter Custom Fields
- Account Custom Fields

Benchmarks

Pop Quiz

What are the benchmarking options available, not including custom benchmarks?

Site Groups:

Cost/Area
Use/Area
Peak Demand/Area
Cost/Day
Use/Day

Meter Groups:

Cost/Day
Use/Day
Cost/Unit

Creating Groups

Creating a manual group

1. In the Groups and Benchmarks module, click on **Site Groups** or **Meter Groups**
2. Click the **+**
3. Enter a name for the group
4. Select a category or add a new category for the group.
5. Decide if all users can see all the sites in the group even if they don't have topmost permission.
6. Click **Manual**.
7. Click on the sites or meters you want to be included in the group
8. Click **Save & View**

Creating an automatic group

1. In the Groups and Benchmarks module, click on **Site Groups** or **Meter Groups**
2. Click the **+**
3. Enter a name for the group.
4. Select a category or add a new category for the group.
5. Decide if all users can see all the sites in the group even if they don't have topmost permission
6. Click **Automatic**
7. Add filters to include the specific sites or meters in the group
8. Click **Save & View**

Pop Quiz

What are some ideas you have for utilizing groups and custom fields?

Recap

Questions?

CATALYST

We'd love to hear your thoughts!

Take a moment to share your feedback
for this session in the **Sched app**.

Your input helps us make future events even better.