CATALYST Catalyst 2025 Atlanta, GA

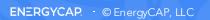
Organizing for Insights: Grouping Sites and Meters for Reporting and Benchmarking



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







- ✓ 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 Members Site Groups Site group > HVAC Types **HVAC TYPES** > Place Primary Use Auto-Group **Buildings with Boilers** Reporting Groups Electric Only Facilities (No Gas) University Facilities Meter Groups PLACE PRIMARY USE AUTO-GROUP Commodity Auto-Group Antenna/Communications 12 > Meter Primary Use Auto-Group General Office 9 Sustainability Tracking Mixed Use Property 5 University Meter Groups Other 3

Where do I find groups?

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

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

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

Benchmarks

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

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



Questions?

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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.