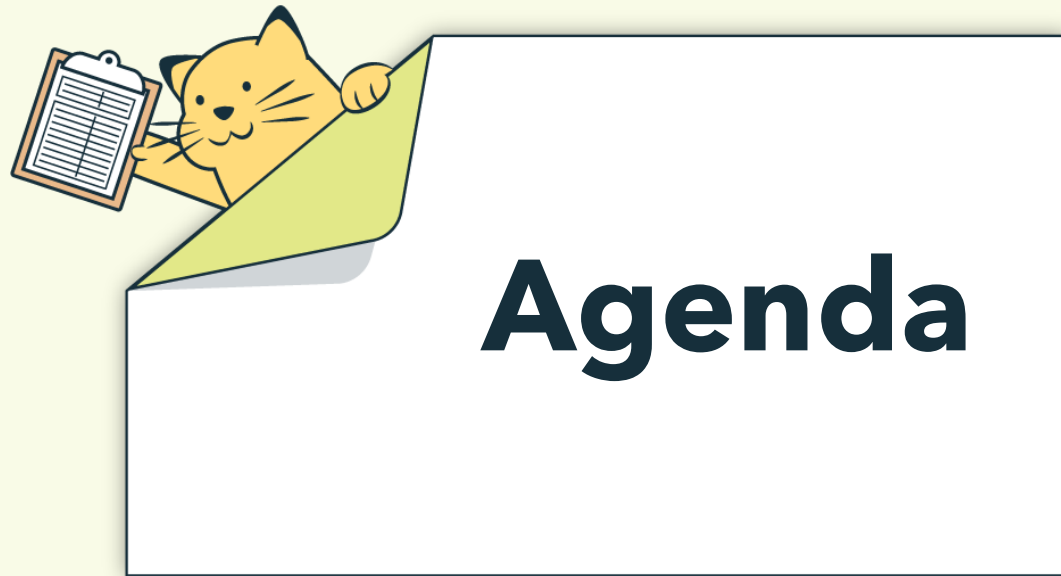




How can I group objects and use them in reporting?



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

What are groups?

What are groups?

Groups help you compare like buildings 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		
Building Groups		
▼ HVAC Types		
⌵ Electric Only Facilities (No Gas)		
➤ Place Primary Use Auto-Group		
▼ Reporting Groups		
⌵ City Buildings SQFT > 20000		
⌵ Emissions Tracking		
⌵ ENERGY STAR Buildings		
⌵ Older than 30 years		
Meter Groups		
➤ Commodity Auto-Group		
➤ Meter Primary Use Auto-Group		
▼ Sustainability Tracking		
⌵ Scope 1: Stationary Combustion		
⌵ Scope 2: Purchased Electricity		
⌵ Scope 3: 04. Upstream Transportation ...		
⌵ Scope 3: 06. Business Travel		
⌵ Scope 3: 09. Downstream Transportati...		

Building Groups		
Building group	Members	Type
▼ HVAC TYPES		
Buildings with Boilers	0	Automatic
Electric Only Facilities (No Gas)	4	Manual
▼ PLACE PRIMARY USE AUTO-GROUP		
Antenna/Communications	12	Automatic
General Office	6	Automatic
Mixed Use Property	6	Automatic
Other	3	Automatic
Other - Public Services	2	Automatic
Parking Structure	6	Automatic
Police Station	4	Automatic
Road/Bridge	1	Automatic
Unknown	17	Automatic
VACANT	1	Automatic
Warehouse - Unrefrigerated	5	Automatic

Where do I find groups?

Groups

To see an overview of Groups, check out our help center documentation:

https://helpcenter.energycap.com/um/groups_overview

Custom Fields

Custom fields

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

Custom fields are available for:

- Buildings
- Meters
- Accounts
- Channels
- Vendors
- Rate Schedules

For more information on custom fields, visit our help center:

https://helpcenter.energycap.com/um/custom_fields/custom_fields_overview

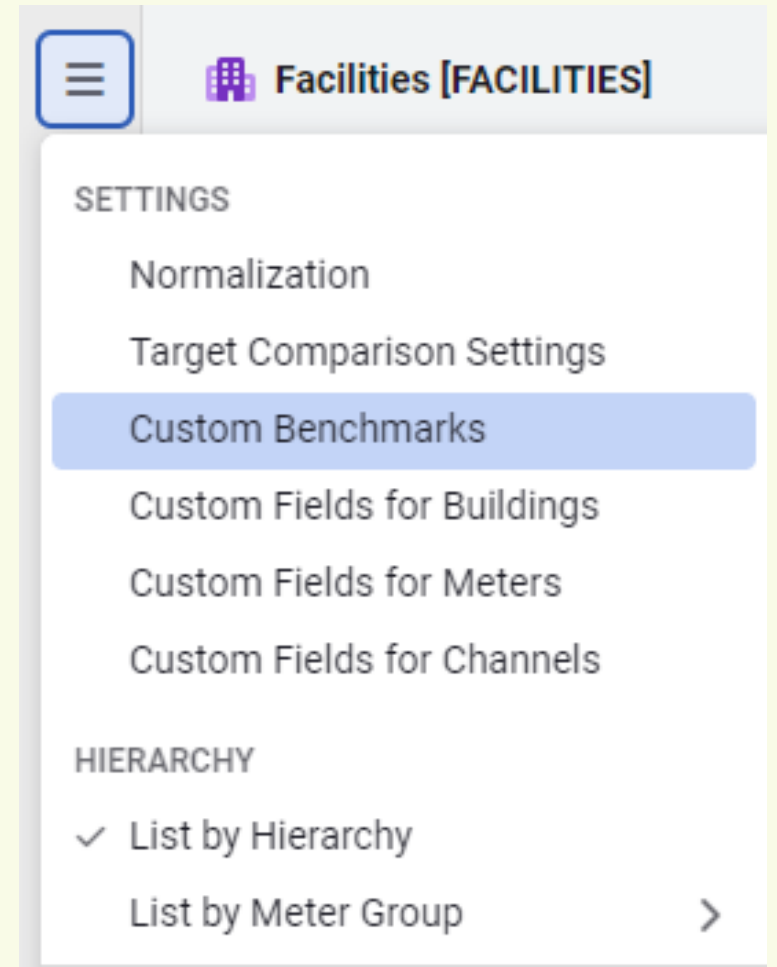
Benchmarks

Benchmarks

Configure custom benchmarks in the Buildings and Meters module menu. Custom building benchmarks use calendarized data for reporting.

To see an overview of Benchmarks, check out our help center documentation:

<https://helpcenter.energycap.com/um/Groups&Benchmarks>



Creating Groups

Creating a manual group

1. In the Groups and Benchmarks module, click on **Building 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 buildings in the group even if they don't have topmost permission.
6. Click **Manual**.
7. Click on the buildings or meters you want to be included in the group
8. Click **Save & View**

To learn more about groups, visit our help center: https://helpcenter.energycap.com/um/groups_overview

Creating an automatic group

1. In the Groups and Benchmarks module, click on **Building 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 buildings in the group even if they don't have topmost permission
6. Click **Automatic**
7. Add filters to include the specific buildings or meters in the group
8. Click **Save & View**

To learn more about groups, visit our help center: https://helpcenter.energycap.com/um/groups_overview

Commodity Categories

Commodity Categories

Commodity Categories allow you to group commodities into categories.

Useful because it gives you more granularity when reporting overall use and cost.

Four categories created by default. These can be changed or deleted depending on your reporting needs

- Electricity
- Sewer
- Travel
- Water

To learn more about commodity categories, visit our help center:

https://helpcenter.energycap.com/um/Units_of_Measure_Overview

Take the session survey:
**How do I group objects and use
them in reporting?**

