

**How can I group  
objects and use  
them in reporting?**

CATALYST 





## Session Agenda

- Purpose of Groups
- Where to Find Groups
- Objects for Grouping
- Types of Groups
- How to Create Groups
- Q&A
- Survey

# EnergyCAP Groups

Groups help you compare like buildings or meters.

Create your own groups based on attributes important to you.

You can use groups as a filter in dashboards, reports, and bill lists.

Groups & Benchmarks		Building Groups				
<b>Building Groups</b>						
▼ HVAC Types						
⚡ Electric Only Facilities (No Gas)						
> Place Primary Use Auto-Group						
> Reporting Groups						
<b>Meter Groups</b>						
> Commodity Auto-Group						
> HVU Calculations						
> Meter Primary Use Auto-Group						
		Building group	Members	Type	Updated	⌂ +
▼ HVAC TYPES						
		Buildings with Boilers	0	Automatic	03/14/2017	🗑️ ✎️
		Electric Only Facilities (No Gas)	4	Manual	03/08/2017	🗑️ ✎️
▼ PLACE PRIMARY USE AUTO-GROUP						
		Antenna/Communications	12	Automatic	06/22/2017	🗑️ ✎️
		General Office	4	Automatic	08/30/2021	🗑️ ✎️
		Mixed Use Property	5	Automatic	08/25/2021	🗑️ ✎️
		Other	3	Automatic	05/08/2019	🗑️ ✎️
		Other - Public Services	2	Automatic	11/23/2021	🗑️ ✎️
		Parking Structure	6	Automatic	06/08/2021	🗑️ ✎️
		Police Station	4	Automatic	08/25/2021	🗑️ ✎️

# Benefits of Groups

Most reports have the filter for building and meter groups.

This has two benefits:

- You can create your own custom groups.
- No need to rely on the tree structure for reporting.



## Two Types of Groups

**Automatic groups** – EnergyCAP automatically assigns membership based on criteria set by user.

**Manual groups** – You can select the members of the group individually, one-by-one.

Building group	Members	Type
City Buildings SQFT > 20000	24	Automatic
Emissions Tracking	32	Manual

# Wrap up



# Questions?

I will be around all week to chat!

# Session Survey

[conferences.energycap.com/surveys](https://conferences.energycap.com/surveys)





## Create an Automatic Group

1. In the Groups and Benchmarks module, click Building Groups.
2. Click the **+**.
3. Enter a name for the group (Your Name's Places > 25,000 Sq Ft)  
*Example: Beth Calehuff's Places > 25,000 Sq Ft*
4. Select a category or add a new category for the group (Your Name's Places).  
*Example: Beth Calehuff's Places*
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 in the group.
8. Click **Save & View**.

## Create a Manual Building Group





1. In the Groups and Benchmarks module, click Building Groups.
2. Click the **+**.
3. Enter a name for the group. (Your Name's Leased Places)  
*Example: Beth Calehuff's Leased Places*
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 you want to be included in the group.
8. Click **Save & View**.

# Create a Custom Field for a Building

1. In Buildings & Meters module, click the module menu over the tree view.
2. From the dropdown, select Custom Field for Buildings.
3. Click the (+) in the top right corner.
4. Select **Yes/No** from the dropdown.
5. Enter a label for your custom field (Your Name's Favorite Place)


Example: *Beth Calehuff's Favorite Place*

6. Click **Save**.


Edit Custom Fields for Buildings	
Type	Label
 Yes/No	<input type="text" value="ENERGY STAR Reportable"/>
 Text	<input type="text" value="Building Notes"/>
 Web URL	<input type="text" value="Wattics Site"/>
 Yes/No	<input type="text" value="✱"/>

## Populate Custom Field to Create a Group

1. Select a building in your Buildings & Meters hierarchy view.
2. Click the **Properties** tab.
3. In the Custom Fields box, click Edit.
4. Choose (**Yes**) from the dropdown for your custom field.
5. Click **Save**.

Custom Fields - 2 of 5 

ENERGY STAR Reportable	Yes
Building Notes	120 or so heat pumps replaced boiler/chiller in 1998.

[Learn more about custom fields and automatic groups](#) 

## Create an Automatic Group with Custom Fields

1. In the Groups and Benchmarks module, click Building Groups.
2. Click the **+**.
3. Enter a name for the group (Your Name's Favorite Places)  
*Example: Beth Calehuff's Favorite Places*
4. Select a category or add a new category for the group (Your Name's Places).  
*Example: Beth Calehuff's Places*
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 in the group.
8. Click **Save & View**.

# Report Filters - Report 1

Search filters

Recommended

☐ Account Period

☐ Billing Period

☒ Building Group

☐ Group Data By

☐ Include Chart

☐ Meter Group

☐ Topmost Cost Center Code

Data Displayed

First Month (1-12)

Include Account Charges

Value Displayed

Account is Active

Bill is Void

Building Group

equals

equals

equals

equals

equals

equals

equals

\* ▼

Antenna/Communications

City Buildings SQFT > 20000

Electric Only Facilities (No Gas)

Emissions Tracking

ENERGY STAR Buildings

General Office

Mixed Use Property

\* ▼

# Widget Filters

**Edit Bar Rank Widget**

CancelSave

Search filters

**Recommended**

☒ Building Group

☐ Meter Group

☐ Topmost Cost Center Code

☐ Topmost Cost Center Name

☐ Topmost Place Code

☐ Topmost Place Name

**Optional**

☐ Account Code

☒ Account is Active

☐ Account Name

☒ Bill is Void

Color Scheme	equals	Blue	▼
Data Displayed	equals	Actual	▼
Date Range ?	equals ▼	January ▼	2022
Group Data By	equals	Place Type - Building	▼
Show First _ Values	equals	25	
Sort Descending	equals	Yes	No
Value Displayed	equals	Cost	▼
Account is Active	equals	Active	Inactive ✕
Bill is Void	equals	Void	Not Void ✕
Building Group	equals	City Buildings SQFT > 20000	▼ ✕
Include Accruals	equals	Yes	No ✕

# Questions?

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