How can I group objects and use them in reporting?

CATALYSTA

Session Agenda

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

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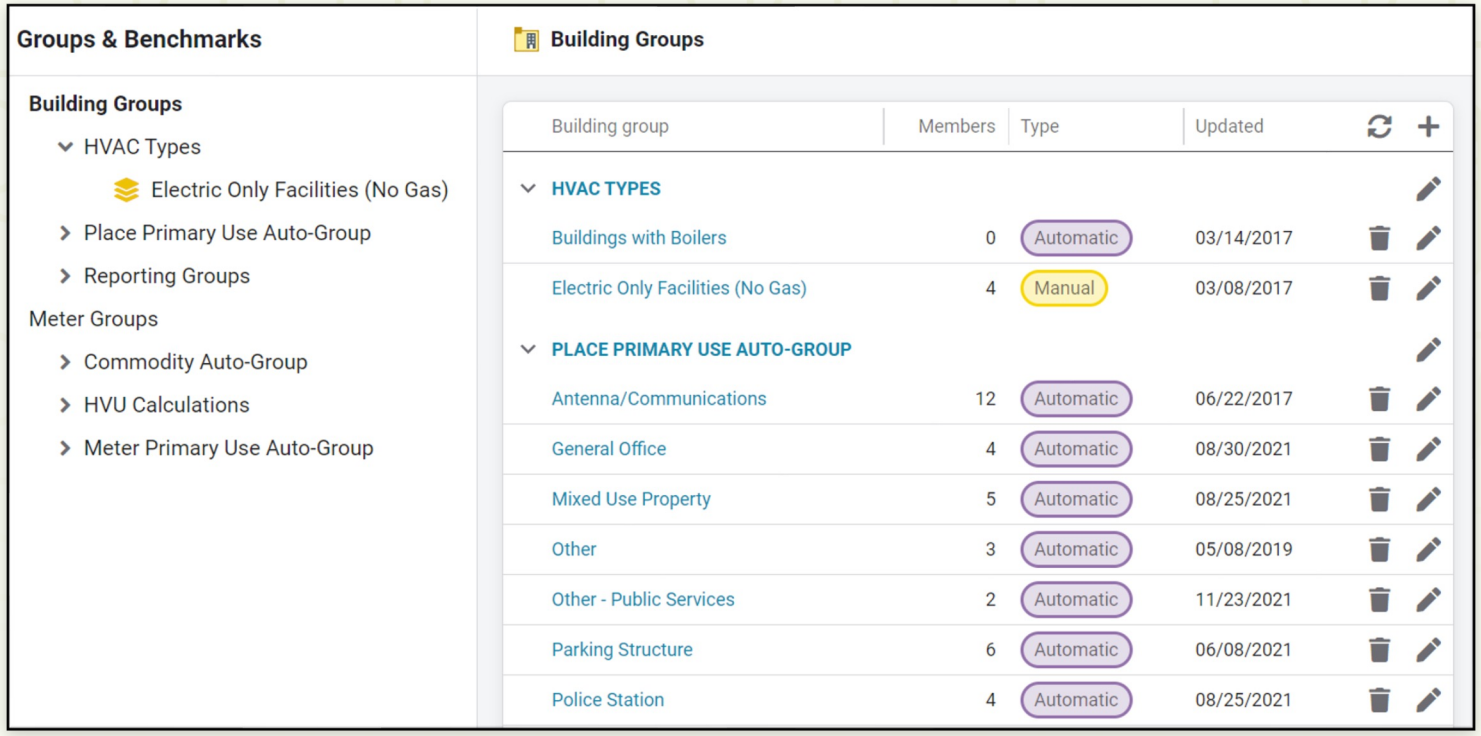
EnergyCAP Groups

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.



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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.

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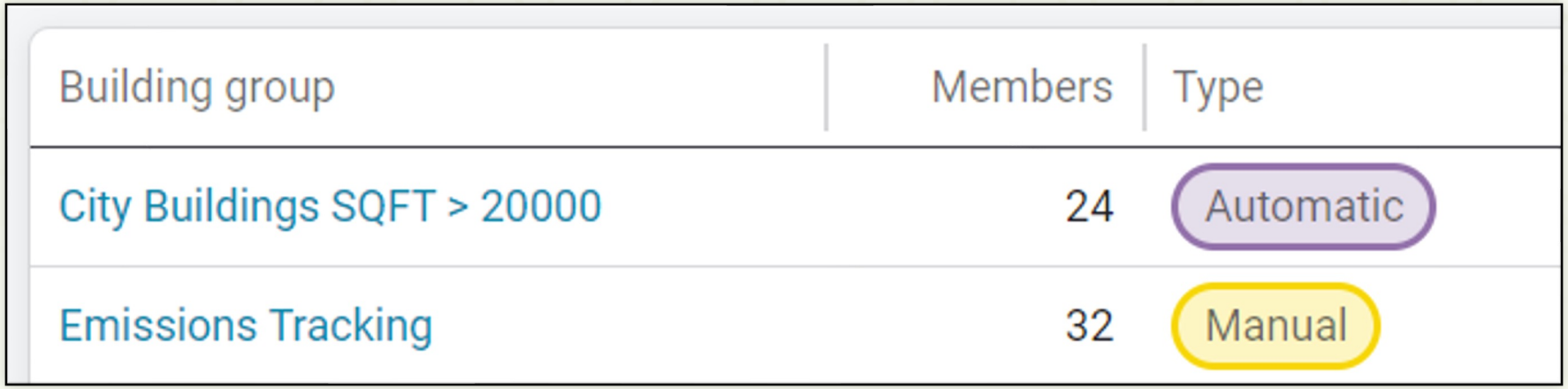
Two Types of Groups

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.



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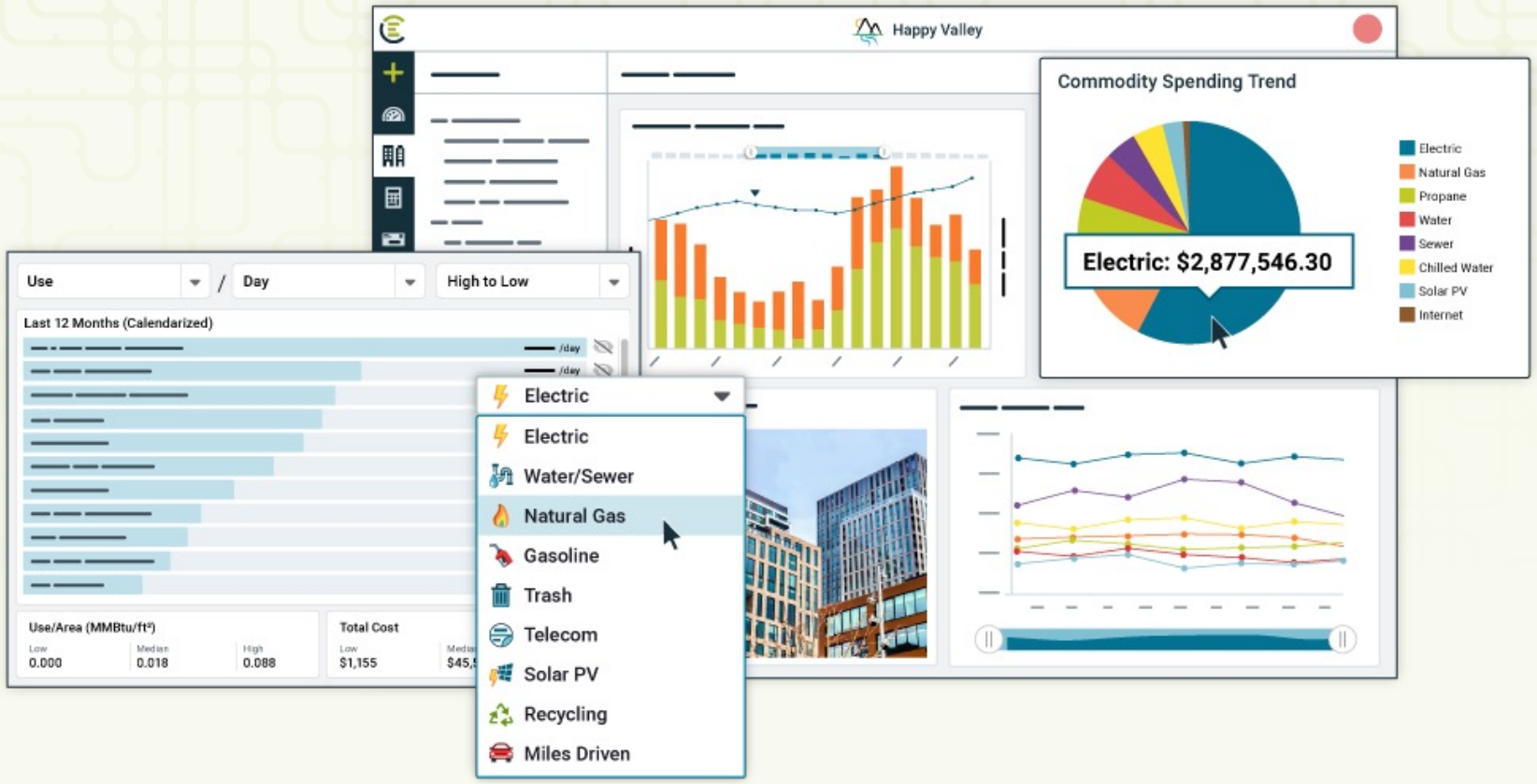
Wrap up



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Questions?

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Session Survey

conferences.energycap.com/surveys

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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**.

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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**.

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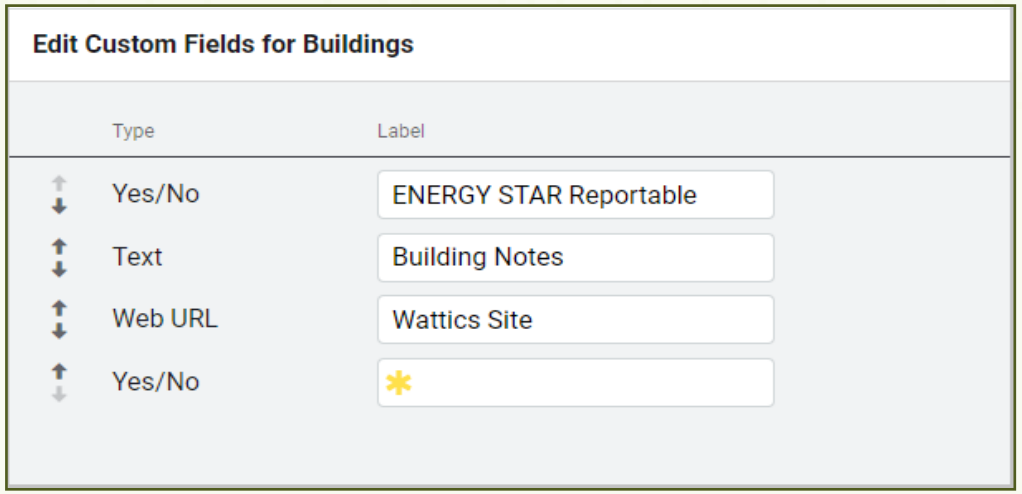
Create a Custom Field for a Building

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**.



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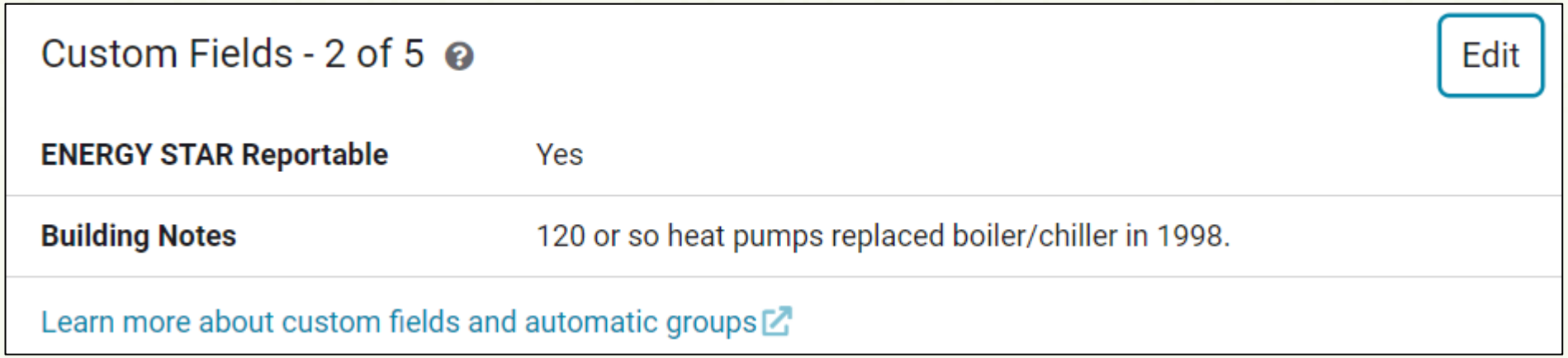
Populate Custom Field to Create a Group

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**.



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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**.

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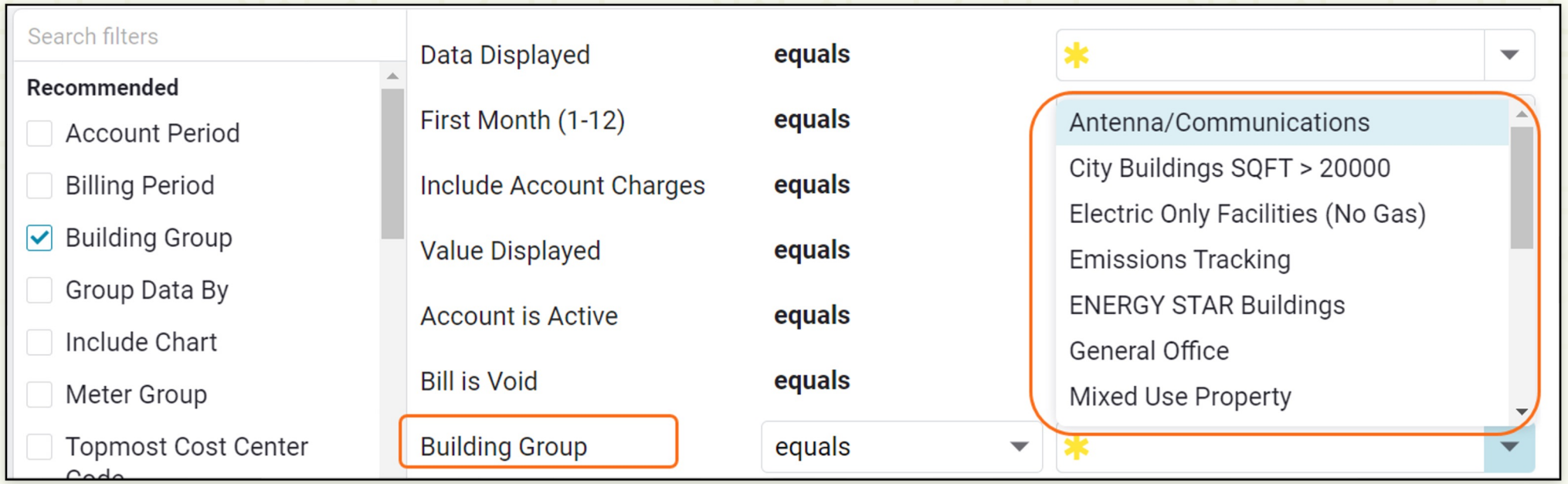
Report Filters – Report 1



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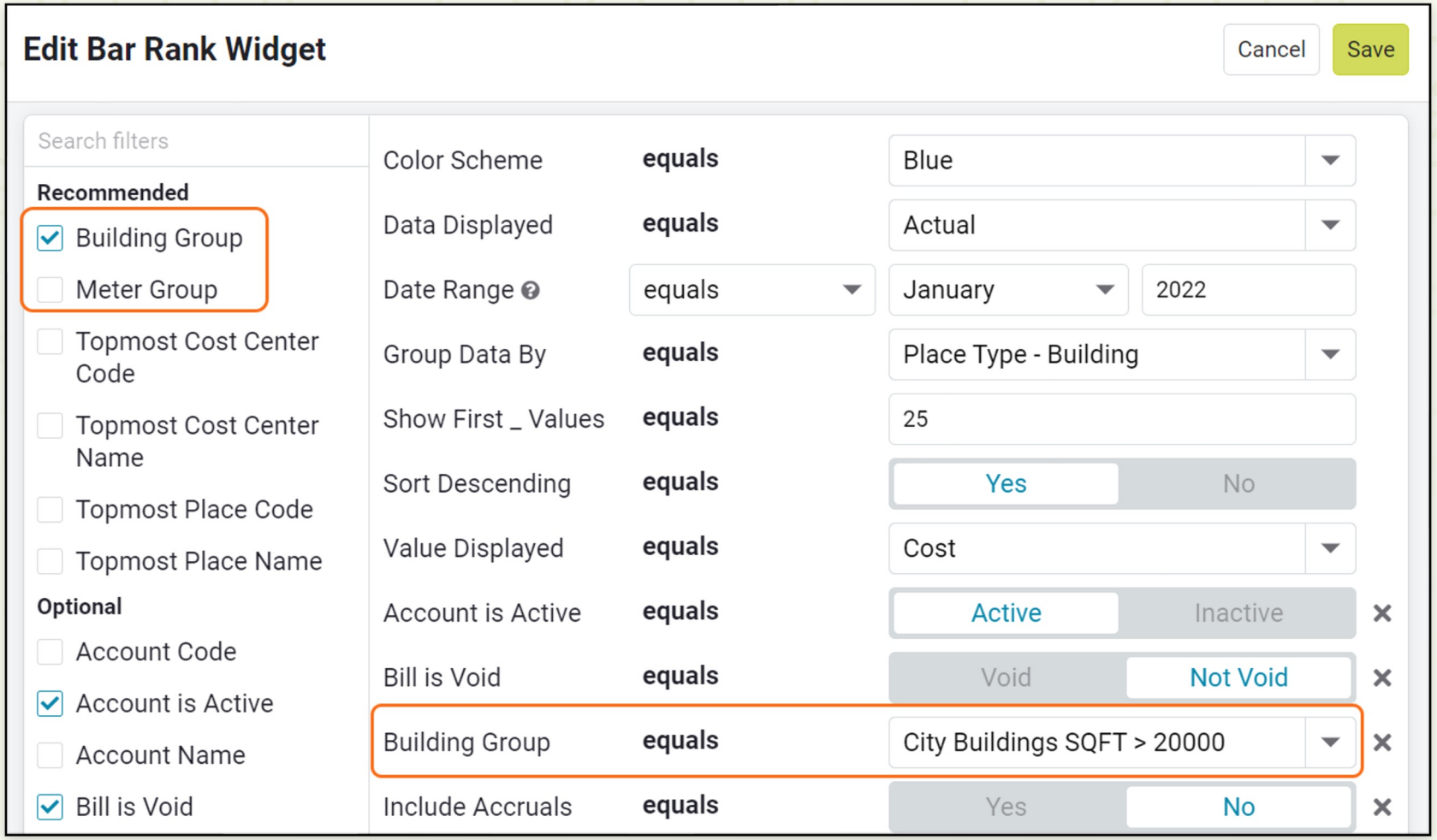
Widget Filters



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