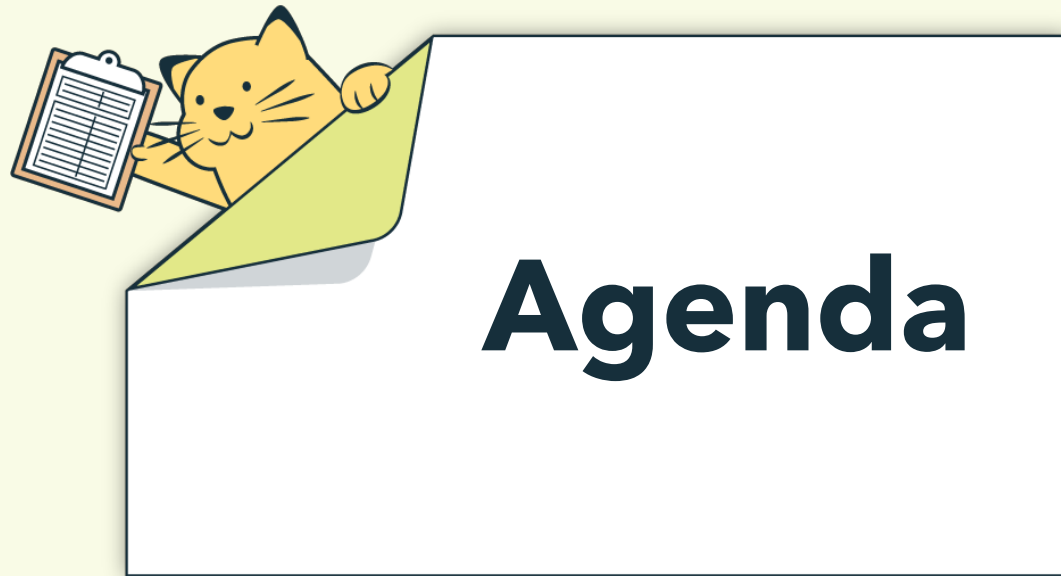


How can I group objects and use them in reporting?



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- ✓ What are groups?
- ✓ Where do I find groups?
- ✓ Benchmarks
- ✓ Creating Groups
- ✓ Custom Fields
- ✓ 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?

Participation quiz

Which objects can be used to populate groups?

- Buildings
- 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 UtilityManagement app.
- Custom fields are available for:
 - Buildings
 - Meters
 - Accounts
 - Channels
 - Vendors
 - Rate Schedules

Participation quiz

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

- Building Custom Fields
- Meter Custom Fields
- Account Custom Fields

Benchmarks

Participation quiz

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

Building 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 **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**

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**

Participation quiz

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

Recap

Questions?



CATALYST '24



Session survey