

Mastering Custom Fields, Groups and Filters

CATALYST 



Today's ground rules

Lectures are boring – **discussions** are WAY better!

Ask questions

Help each other – share your experiences and ideas

Participate and **provide feedback!**



Mastering Custom Fields, Groups and Filters

- Maximizing the value of Custom Fields
- Creating and Managing Groups
- Using Groups throughout EnergyCAP
- The “Art” of Filters

Custom Fields

Make your EnergyCAP database your own!

- Available on multiple objects: buildings, meters, accounts, vendors, rate schedules, channels

Unlimited number available

Lots of data types to choose from

Don't forget about Advanced Custom Fields

Demo: Custom Fields

But wait, there's more...

Even More You Can Do With Custom Fields

Reports

- Available to export with your data

Manage with Setup Spreadsheets

Use as filters?

Use for groups?

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				
Building Groups						
▼ HVAC Types						
⚡ Electric Only Facilities (No Gas)						
> Place Primary Use Auto-Group						
> Reporting Groups						
Meter Groups						
> 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

Demo: Creating Groups

Value of Groups

Report filters

Dashboard filters

Dynamically filter dashboards

Filters

Mastering filters can save you a lot of time and help you master your data

Filters available:

- Reports
- Dashboards
- Bill Lists
- Groups

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

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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 ×

Demo: EnergyCAP Filters

Questions?

Session Survey

conferences.energycap.com/surveys

