

Adding a User-Defined AutoGroup

Description

User Defined Auto Groups (UDAGs) will help users get the best visibility and access to their building and meter data. With User-Defined Auto-Groups, users can now create a group that is populated and maintained automatically using a comprehensive list of available filters, including meter and building User-Defined Fields (UDFs). This provides an incredibly powerful way for users to create groups that retain relevance and real value.

This topic will...

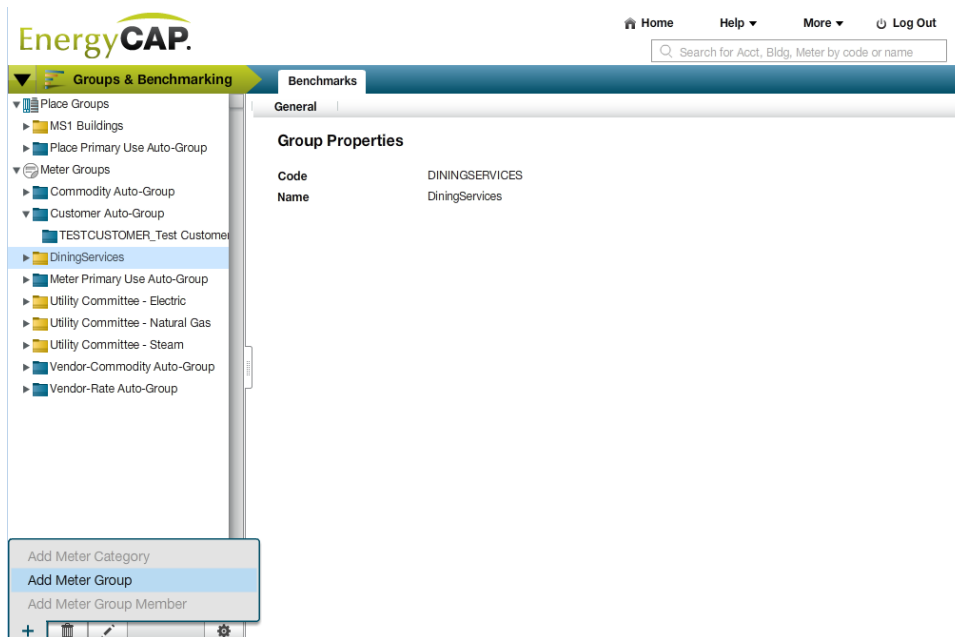
- describe the process for adding a User Defined Meter Auto Group.
- describe the process for adding a User Defined Place Auto Group.

Prerequisites

- The ability to add a group requires permissions associated with the following User Roles:
 - Administrator - Full Access
 - Bill Entry & Account Setup
 - Bldg Administrator

Step-by-Step

1. Select **Groups & Benchmarking** from the Main Menu. The Groups Tree View will be displayed on the left, divided into Place and Meter Groups.
2. Click to highlight the Place Category or Meter Category tree node under which the Group will reside.
3. Click the **Add** button beneath the Tree View.



4. On the General tab, complete all necessary fields. Then click Continue.
 - a. In the **Name** field, enter the display name for the Category.
 - b. In the **Code** field, a code based on the name will be automatically created. This field can be changed to any desired value.
 - c. For Meter Groups, the **Hide Group Members** check box determines how to honor an individual's user permissions if others with a different set of permissions will be viewing data for the Group.
 - d. Select the Automatic method radio button for the **Group Maintenance Method**.

Meter Group Wizard

Enter the common name of this group and give it a code, which is an abbreviation or shortcut.

Name *

Code *

Hide group members that are outside of user's Topmost Place

Group Maintenance Method *

Manual - group members must be manually added and removed

Automatic - group members will automatically be added and removed

* Required Field

5. On the Filters tab, set all applicable filters. Then click Continue.

Meter Group Wizard

Select one or more filters. Every Meter that meets all filter conditions will be added to the Group:

Current Filters		
Account Active	Equals	Yes
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Filter Settings:

Filter:

Operator:

Value:

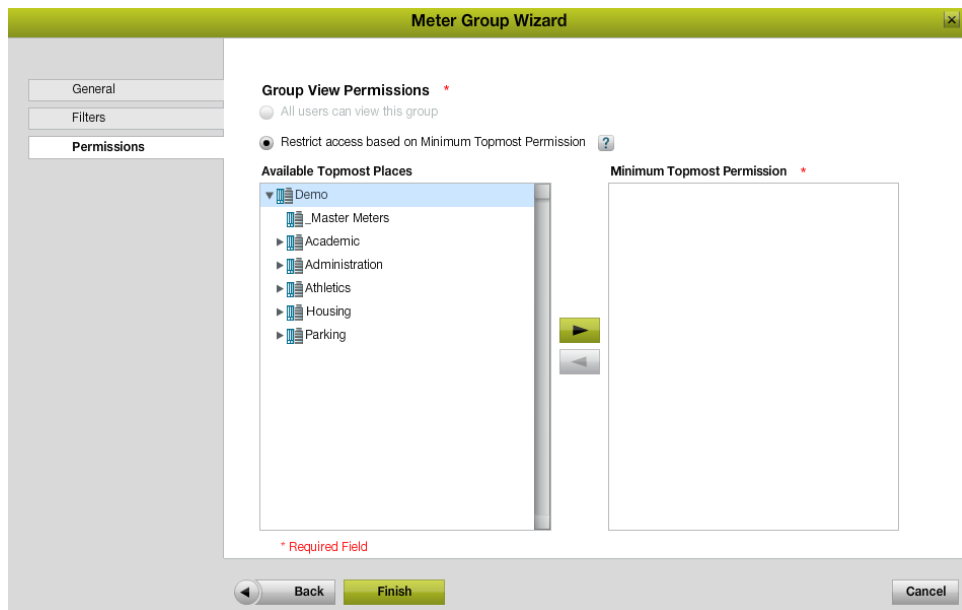
Additional Filters

-
-
-
-
-
-
-

* Required Field

6. On the Permissions tab, click a **Group View Permission**:

- **All Users can view this group** allows any user to view this group
- **Restrict access based on Minimum Topmost Permission** enables the Topmost place tree. Select the Available Topmost Place desired and move it to the Minimum Topmost Permission by clicking the appropriate arrow button.



7. Click **Finish**. The **Group Wizard** will close and the new Group will be available on the tree.

Rules & Restrictions

- Categories cannot be created beneath Groups.
- Groups must be created under a Category.
- Groups cannot be added to an Auto-Category, indicated by the blue-colored folder. These are automatically generated by EnergyCAP, and cannot be modified.
- If Automatic Method is selected, at least one filter must be set.
- A user having a Topmost Place permission (established in Users & Permissions) that is EQUAL TO OR HIGHER THAN ANY ONE of the Minimum Topmost Permission selected for the Group may view the Group's Benchmark charts. A user having a Topmost Place permission that is LOWER THAN the Minimum Topmost Permission selected lacks sufficient viewing rights, and will not be able to see the Group from the Tree View.

Additional Information

- User Defined Auto Group filter list includes basic demographic information and ALL meter or place User Defined Fields (UDFs).