Application Note – Site Groups in Monitoring

Version History

- Version 1.0, October 2022 – first issue
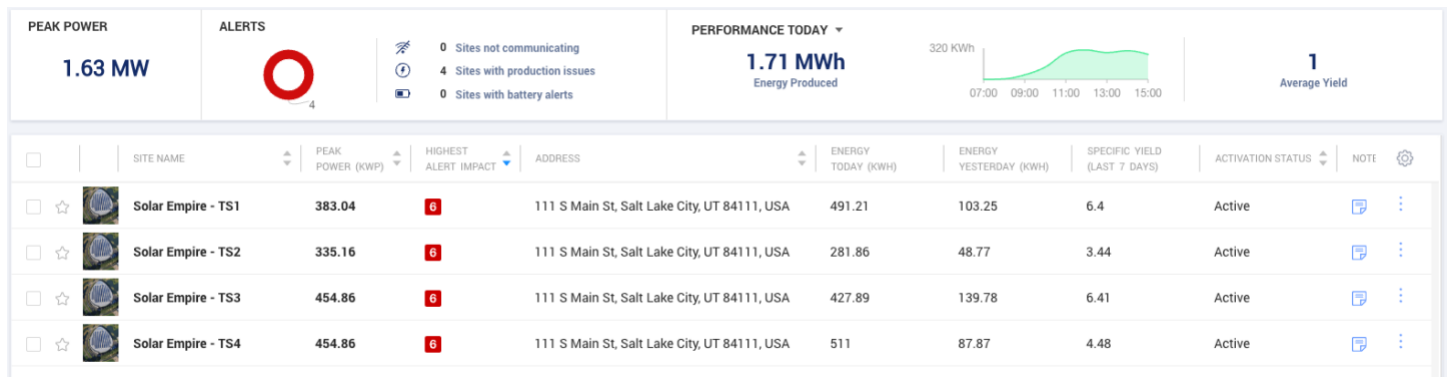
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About This Feature

The Monitoring Platform allows you to create groups of sites, assign and remove sites from them and quickly access them using a dedicated filter in the Site List.

Use Cases

In this section, we'll provide a few examples of how Site Groups can be used to optimize your Fleet Management and O&M processes.

Site of Sites

In larger installations, it is common for customers to split one physical site into several logical "sites" that represent a particular substation or zone. In these situations, it is beneficial to look at each individual section separate, while also being able to view the site's aggregated performance metrics. Site Groups can be used to bundle together the "subsites", like in the example below.

Fleet Segmentation

As solar asset fleets grow, installers and O&M vendors might be responsible for a sizeable fleet comprised of different types of sites, customers, and contracts. Site Groups can be used to organize the fleet and segment sites into different categories – for example, sites with an active O&M contract, vs. orphaned sites inherited from a bankrupt installer. Additional examples could include segmentation by Residential/Commercial, utility company, PPA/cash sites, or by a specific customer's name.

Task Management

Complex O&M flows can involve multiple departments and stakeholders. Site Groups can be used to "assign" sites to different departments or employees, who can then quickly see them in the group.

> **NOTE**
>
> Site Groups are only visible to the account that created them. This means that users in other accounts, including system owners, subaccounts and associated accounts, will not be able to see your Site Groups or filter by them. Use the Favorite flag to save sites only for your own Monitoring user.

Creating and Managing Site Groups

> **NOTE**
>
> To create or delete Site Groups, your SolarEdge user will need to have the role of Account Operator or greater. Users with other roles will only be able to filter by existing groups.

To **create** a new Site Group:

1. Navigate to the Site List page (the main page)
2. Click the **Group: All** dropdown located in the Filter Panel on the left hand
3. Choose **Manage Groups**
4. Click the **Add Group** button, type in the new group's name, then click Enter

To **rename** or **delete** existing groups:

1. Access the **Manage Groups** screen as described above
2. Locate the Site Group that you wish to modify
3. Click the pencil icon to rename the group – hit **Enter** to apply the changes
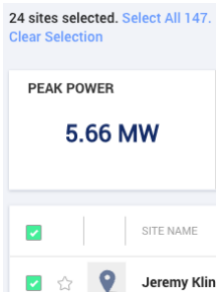4. Click the X icon to delete the group. This will **not** delete the sites in it

> **NOTE**
>
> A Site Group's name must be between 2 and 30 characters in length and must be unique in your account.

Adding & Removing Sites

To **add sites** into a Site Group:

1. Go to the Monitoring Site List
2. Locate the sites you wish to add into the Site Group by applying relevant filters (for example – by name, serial number, location, etc.)
3. Select all the sites you wish to add to the group by clicking the checkbox next to them
   a. You can select all sites in the page by clicking the checkbox located in the table header
   b. Click **Select all...** to choose sites from all result pages and not only from the current one

4. Click the **Actions** dropdown in the top right corner of the screen and choose **Add to Group**
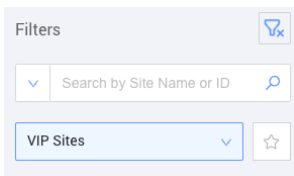5. Check the relevant Site Group and click **Apply**

NOTE	

A site can belong to multiple Site Groups. However, it is only possible to add sites to one group at a time. You can repeat the process if you'd like to add the same sites into a different group.

To **remove sites** from a Site Group:

1. In the Site List, check the sites you want to remove from a group
2. Click the **Actions** dropdown and choose **Remove from Group**
3. Select the relevant Site Group and click **Apply**

Filtering by Site Group

When filtering by Site Group, your Fleet Dashboard will display enhanced performance metrics for the entire group, including todays and yesterday's power production chart. This feature is available for Site Groups that contain up to 200 sites.

Once you have your Site Groups set up, it is super easy to access them:

1. Go to the Monitoring Site List
2. Click the **Group: All** group and choose the group you want to filter by

Support Contact Information

If you have technical problems concerning SolarEdge products, please contact us:

https://www.solaredge.com/service/support

Before contact, make sure to have the following information at hand:

- Model and serial number of the product in question.
- The error indicated on the product SetApp mobile application LCD screen or on the monitoring platform or by the LEDs, if there is such an indication.
- System configuration information, including the type and number of modules connected and the number and length of strings.
- The communication method to the SolarEdge server, if the site is connected.
- The product's software version as it appears in the ID status screen.