



Creating Groups and Using Benchmarks



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Agenda



1. What are groups?
2. Creating groups
3. Benchmarks
4. Custom benchmarks
5. Recap & questions

What Are Groups?

Groups are a way to categorize sites and meters for reporting and benchmarking — group them together based on how they relate to each other.

Why it matters: you can benchmark similar buildings and meters against each other, not just against themselves

- One customer found an electric meter running 3x higher than similar buildings on other meters — caught through group comparison

Two ways to build membership: manually select members, or use existing properties to auto-populate (e.g., location, primary use, square footage, build date, custom fields etc.)

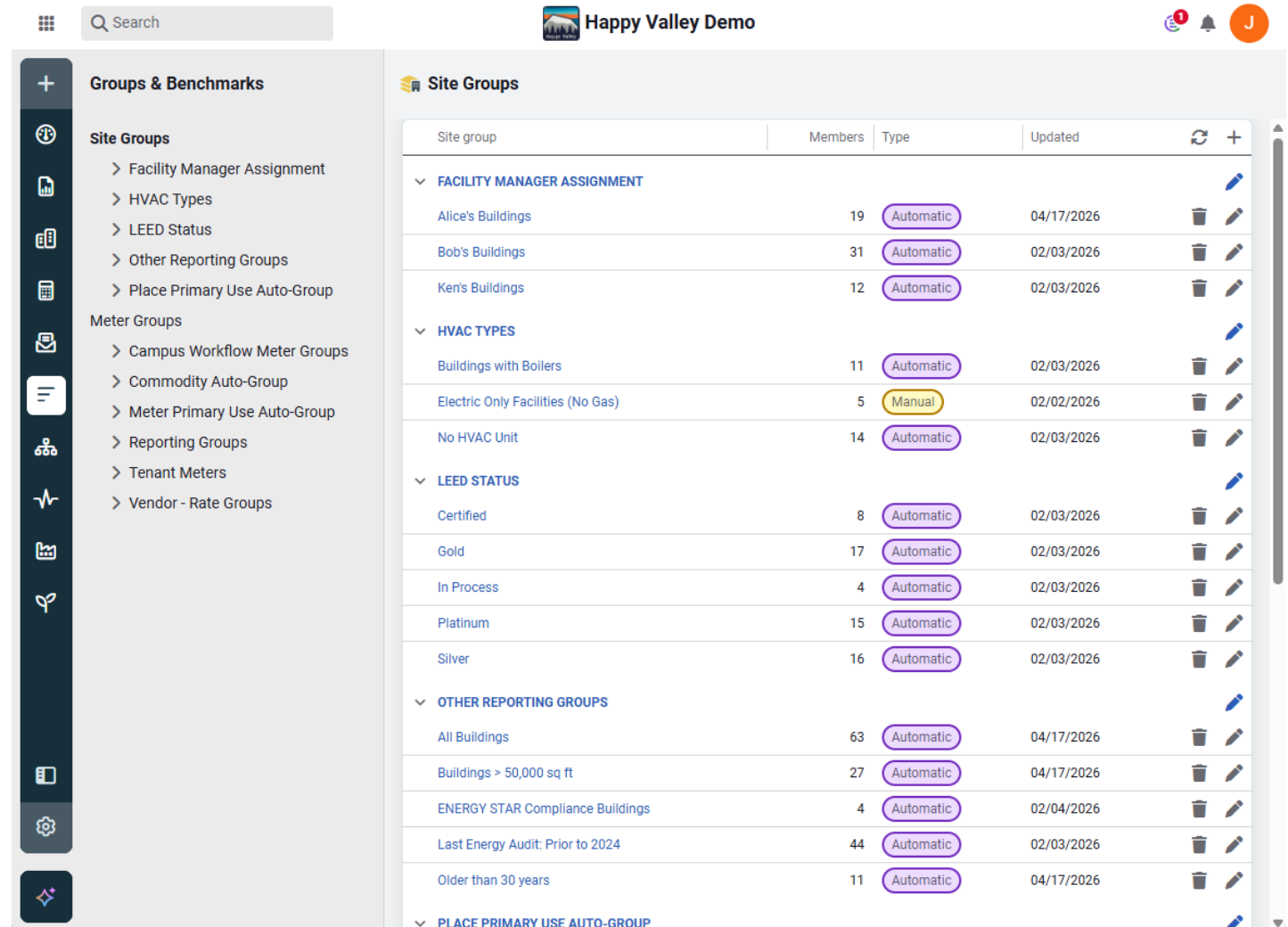
Big benefit: dashboards, bill lists, and most reports let you filter by group

- Topmost place filters are limited to your tree structure, groups aren't

What Are Groups? — Groups & Benchmarks Overview

The Groups & Benchmarks module:

- Site Groups vs. Meter Groups
- Categories help organize groups
- Manual vs. Automatic group types
- Benchmark Views



Groups & Benchmarks

Site Groups

Site group	Members	Type	Updated	
FACILITY MANAGER ASSIGNMENT				
Alice's Buildings	19	Automatic	04/17/2026	
Bob's Buildings	31	Automatic	02/03/2026	
Ken's Buildings	12	Automatic	02/03/2026	
HVAC TYPES				
Buildings with Boilers	11	Automatic	02/03/2026	
Electric Only Facilities (No Gas)	5	Manual	02/02/2026	
No HVAC Unit	14	Automatic	02/03/2026	
LEED STATUS				
Certified	8	Automatic	02/03/2026	
Gold	17	Automatic	02/03/2026	
In Process	4	Automatic	02/03/2026	
Platinum	15	Automatic	02/03/2026	
Silver	16	Automatic	02/03/2026	
OTHER REPORTING GROUPS				
All Buildings	63	Automatic	04/17/2026	
Buildings > 50,000 sq ft	27	Automatic	04/17/2026	
ENERGY STAR Compliance Buildings	4	Automatic	02/04/2026	
Last Energy Audit: Prior to 2024	44	Automatic	02/03/2026	
Older than 30 years	11	Automatic	04/17/2026	
PLACE PRIMARY USE AUTO-GROUP				

Creating Groups

Benchmark Views

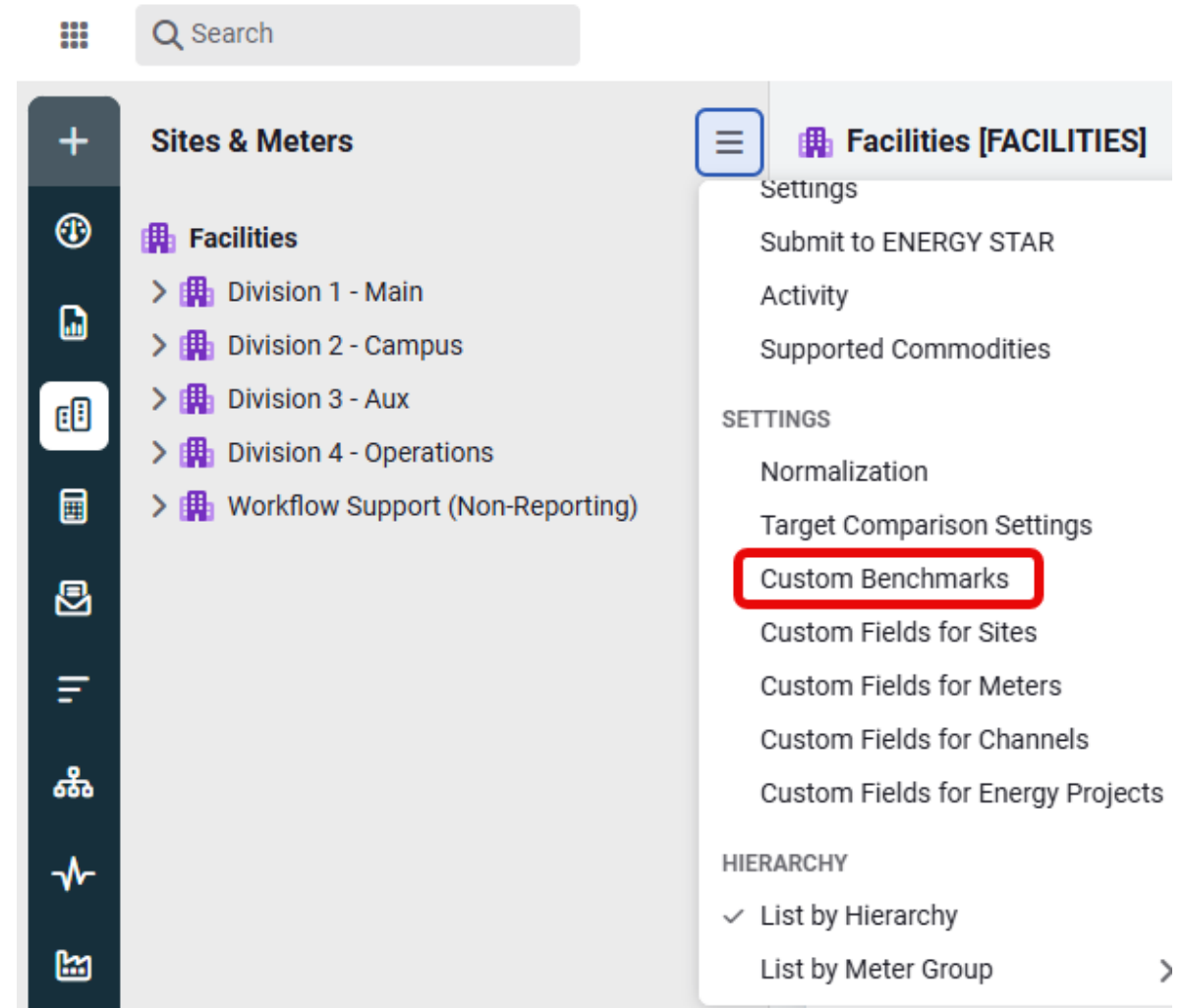
Custom Benchmarks

Assigned to buildings, so they are only available for building groups.

Use case: benchmark against something other than area or days.

Shows up in Bar Rank/Trend chart widgets, the Ranking Report, and the Monthly Building Manager Report.

Can be populated using update spreadsheets.



Custom Benchmark Examples

University

Benchmark cost or use per student, based on enrollment.

Office Building

Benchmark cost or use per hour, based on hours of use.

Manufacturing

Benchmark cost or use per gadget produced, based on production output.

Custom Benchmarks

Cancel

Save

Name	Benchmark Type	Used
Occupant	Building occupants ▼	63 buildings 
Working Hour	Hours of use ▼	63 buildings 
Unit Produced	Production output ▼	63 buildings 

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Questions?