Benchmarking in Portfolio Manager – Instruction Sheet #1

The below instructions cover creating a property, adding meters, entering data into meters, and sharing a property in the Energy Star Portfolio Manager tool:
https://portfoliomanager.energystar.gov/pm/login.html

A. Create Properties
   1. Select Property type – choose that which best describes your building.
   2. Under Your Property's Buildings, choose "My property is a single building."
   3. Choose 'Existing'
   4. Proceed to 'Set Up a Property: Basic Property Information'
      i. Enter your building's address, the approximate year it was built (by decade), and Gross Floor Area (approximate square footage, which must be accurate). Ignore Irrigated Area. Select 100% Occupancy.
      ii. Proceed to next page, where you will enter building usage data. Here, ensure that the Gross Floor Area matches the previously entered number. Then, enter the Weekly Operating Hours – however many hours a day the building is in use and open to the public. For instance, if a building is operational from 9:00 AM – 5 PM Monday through Thursday, you would enter 32 hours.
      iii. Enter the number of workers on the main shift, and the number of computers being used. Click 'Finish'
      iv. If your building has multiple uses, click on the name of the Property you've created. On the Details tab, select "Add Another Type of Use", and select that which is appropriate for the other section of your building, then click Add. You'll be taken to a page and prompted to enter Gross Floor Area allocated to that usage, the Weekly Operating Hours, Number of Workers of Main Shift, and Number of Computers Being Used. Once you've completed this, make sure that the square footage of the two uses adds up to the actual square footage of the building.

B. Create Meters
   1. Click on the name of the Property you've created.
   2. Click on the Energy Tab, then select Add a Meter.
   3. Select all the types of energy sources that this building uses, whether that's electric, natural gas, etc. This information should be available on the utility bills you've gathered, and sometimes separate fuel delivery bills. Select the number of meters.
   4. Click 'Get Started!'
   5. Under Meter Name, enter the Meter Number visible on the utility bill. Meter Type should be pre-selected, as it was selected in step c. Units for electricity are typically kilowatt hours (kWh), while units for natural gas are hundred cubic feet, or ccf. Select the unit that is listed on your utility bill or in the excel spreadsheet that your municipality provided you with.
   6. The Date Meter became Active is the first date for which you have utility bills, not the date the building was built. Ignore Date Meter became Inactive, unless the meter is not currently in use. If the fuel is delivered (such as fuel oil or propane), then select Enter as Delivery. We highly recommend entering additional Meter ID Names that describe the location of the meter if there are

multiple meters in the building. Selecting a name that will be understood by most staff would be ideal.

7. Click 'Create Meters.' Then, if you have entered all the meters for this building, select the checkmarks next to the meter name and select 'These meters account for the total energy consumption of this building'. Then Apply Selections.

C. Entering Energy Use Data to a Meter
   1. There are two ways to enter data – manually or using spreadsheets.
   2. To enter data manually:
      i. On the homepage, select the property that you would like to manage. Then select Energy, and the Meter you wish to enter data for.
      ii. Under Monthly Entries, select 'Click to add an entry'. Find the appropriate utility bill. Then enter the Start Date and End Date as seen on the utility bill for that month, as well as the Usage in kWh, the total cost, and if visible on the bill, demand (kW), and Demand Cost.
      iii. Click 'Save Bills'. On the next page, Portfolio Manager will flag any discrepancies, gaps or overlap with the Start and End Dates of each billing period.
   3. To enter your data in spreadsheet format:
      i. To format your spreadsheet correctly for entry into Portfolio Manager, use Pivot Tables to arrange the data in the proper format. Kat will assist. Your data should eventually look like this, or similar. You want the meter name or number up top, with billing dates formatted as rows, and usage (relevant units) and cost as columns.

		Meter Name		
		Meter ID		
Years	**Billing Date**	**Sum of Amount**	**Sum of Usage-KW**	**Sum of Usage-CCF**
2019	Jun	0	0	9
	Jul	0	0	8
	Aug	0	0	2
	Sep	0	0	3
	Oct	0	0	44
	Nov	199.69	0	336
	Dec	520.99	0	559
2020	Jan	1198.33	0	639
	Feb	111.59	0	602
	Mar	528.3	0	495
	Apr	339.61	0	0
	May	284.28	0	303
	Jun	0	0	0
Grand Total		**3182.79**	**0**	**3000**

      ii. To enter spreadsheet data into Portfolio Manager:
         a. On the homepage, select the property that you would like to manage. Then select Energy, and the Meter you wish to enter data for.

    b. Under Upload Data in Bulk for this meter, download the 'Single Meter Spreadsheet Template', which is different for each type of energy source.
    c. Copy and paste data from your municipal spreadsheet into the Portfolio Manager spreadsheet. (Start Date, End Date, kWh Usage, Total Cost, and optionally Demand (kw) and Demand Cost), then upload the file to add all those entries at once.
    d. Be careful to ensure that the Start and End Dates align properly and are entered correctly. For instance, if one billing period ends on August 7th, the next should start on August 8th.
    e. Click 'Save Bills'. On the next page, Portfolio Manager will flag any discrepancies or overlap with the Start and End Dates of each billing period.

D. Sharing Properties
1. In order to complete the Benchmarking action within the Clean Energy Communities Program, the completed Benchmarking data must be shared with NYSERDA. Once your properties are finalized and two years of data are entered, you can begin this step.
2. We recommend sharing your properties with your CEC Coordinator before sending to NYSERDA to help you review for any mistakes that have been made.
3. First, you'll need to group your properties. Once you've created all your properties, go to the MyPortfolio homepage and select Add/Edit/Delete Groups, above the list of properties. Then click 'Create a Group', name your group "Town/Village/City of ______", and select all the properties you've created. Click 'Create Group'.
4. Second, connect with the person or organization with whom you want to share properties – NYSERDA CEC1. To do so, go to the upper right corner of your homepage, and click Contacts. Under Search for New Contacts, enter "NYSERDA CEC1". When you have found the correct user, click Connect next to their username.
5. NYSERDA, or the CEC Coordinator, then has to accept your connection request, which may take a couple of days. No email will be sent to you when that connection request is accepted, so you'll have to check back at the Contacts page.
6. To Share a Property, click on the Sharing Tab. Then click on the Share, or Edit Access To Button. To share with NYSERDA, select Properties in a Group, and select the group you created. Under Select People, Select NYSERDA CEC1 and Choose Bulk Sharing "Read Only" Permission. To share with a connected CEC Coordinator, select that coordinator's name, and then choose Bulk Sharing "Full Access".