

# HOW TO GUIDE

Step-by-step instructions to use the U.S. EPA's Portfolio Manager to comply with the City of Seattle's Energy Benchmarking and Reporting requirements.

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- A Property Use Details Worksheet for ENERGY STAR Eligible Buildings
- B Entering Utility Data Manually into Portfolio Manager
- c Resources



## What is Energy Benchmarking?

Benchmarking tracks the total electricity, natural gas, steam, or other utilities used in a building (often called energy or building performance). The U.S. EPA's ENERGY STAR Portfolio Manager is the standard for benchmarking. This How to Guide shows how to benchmark a building to determine the building's:

- Energy Use Intensity (EUI), which indicates the building's energy use per square foot (kBtu/sq. ft.) per year. A lower score indicates a more efficient building.
- About 20 types of buildings will also receive a 1-100 ENERGY
   STAR rating. A higher score indicates a more efficient building.

## See How Your Building's Energy Use Stacks Up!

When you are finished benchmarking, compare your building's energy use intensity (Site EUI), which is its annual energy use per square foot with other similar types of buildings in Seattle at **www.seattle.gov/ EnergyBenchmarking**. The information is based on data analyzed from buildings 20,000 SF or greater that had energy use reported to the City, as required by the Seattle Energy Benchmarking and Reporting law.

## **STEP 1 Get Started**

- □ Confirm the accuracy of the information provided about the building on the notification and/or warning letter sent by the City of Seattle. This includes:
  - 1. Building size
  - 2. Building address
  - 3. Year built
  - 4. Building owner or property manager

To correct errors, please contact the Benchmarking Help Desk at energybenchmarking@seattle.gov or (206) 727-8484.

- □ Obtain the following details about the building's use:
  - 1. The primary use of the building. For example: multifamily, office, warehouse, etc.
  - 2. The gross floor area of the building, not including parking area.
  - 3. The floor area of parking that is metered with other building uses. For example: a garage with lights and ventilation that is connected to the

"house" meter, which may also serve common areas in the building.

#### Need help?

For free help, e-mail energybenchmarking@seattle.gov or phone (206) 727-8484 (M-F, 8-5).

*Visit the website to learn about in-person help and free workshops.* 

4. The floor area of any other uses of the building. For example: a multifamily building might have ground floor retail shop(s).

5. For buildings eligible for an ENERGY STAR score, other details like operating hours, number of workers, etc. are required for benchmarking. Use the **Property Use Details Worksheet for ENERGY STAR Eligible Buildings** in the Appendix of this guide.

- 6. Information about what energy utilities are used for both the common area and tenant spaces. For example, does the ground floor restaurant have gas service from PSE in addition to City Light electric?
- Already benchmarking? If you currently benchmark your building using Portfolio Manager, simply skip to Step 4 to confirm buildings' Energy Use Intensity and then complete steps 5 and 6.

#### **Missing your letter?**

Contact the Help Desk for a copy or to find your building's ID number.

#### Prefer to use an outside service provider?

Visit www.neec.net/benchmark for a list of benchmarking vendors.

Continue to Step 2  $\rightarrow$ 

## **STEP 2** Set Up Property in Portfolio Manager

- □ **Create a new account** in Portfolio Manager at <u>www.energystar.gov/portfoliomanager</u>.
  - 1. On the right side of the page, click the blue **Register now** button.
  - 2. **DO NOT** use ANY special characters in your username (letters and numbers only).

3. KEEP A RECORD of the username and

#### What if I don't use a computer?

- 1. Call (206) 727-8484 and provide a mailing address.
- 2. Complete and return mailed forms and our staff will facilitate your computer process
- password it is not possible to change usernames. *To recover a lost password click on the 'forgot password' link or submit an online request <u>form</u>.*
- 4. We recommend using one Portfolio Manager account per building, so buildings can be easily transferred to a new employee, manager or owner.
- □ Answer the basic questions about you and your organization.
  - 1. For **Reporting Units**, choose "Conventional EPA Units (e.g., kBtu/ft²)."
  - 2. For "Can other people search for you and send a connection request?", choose **Yes**.

	ail address provided with further instructions to finish creating y the email in your inbox, check your Spam or Junk folder.	
Velcome to Port	Tolio Manager	
Username: Password:	 	
() Help	Create a New Acco	

After creating an account, you will get an email to
 verify your account. Once verified, it will take you back to the Portfolio Manager home page. Once there, Login with your new credentials, then click on Add a Property.

- 1. Select the primary function of the property.
- 2. Select the number of buildings. Most people

A campus is a set of buildings on a shared energy meter or central heating plant (not including hospitals, senior care, or K-12 schools).

will select, "One: My property is a single building." If the property is a campus (see right), please read **EPA's Guide:** <u>How to Benchmark a Campus.</u>

3. For Your Property's Construction Status, select Existing.

ENERGY STAR® PortfolioManag	er™	Determine the set of t	
MyPortfolio Sharing Planning Properties (5) Add a Property	Reporting         Recognitio           Notifications (0)         You have no new notifications.	Ver Poyset's Charan Function	the set of a strate fit of the set o
Source EUI Trend	My Properties (5) Filter by: View All Properties Create Group   Man	Your Property Construction Status     Work Property stars but for any ownersky that grave underlight the property as a construction project that has not     constructions of the property in the construction of the property in the constructio	property type that best refects the activity is the manyour province basing Don't warm if you have other transition with definent builties type, just ledd the math activity.

How does Portfolio Manager define a Property? Portfolio Manager calls buildings "properties" and in most cases one building = one property. In Portfolio Manager, "properties" mean a contiguous parcel, not all the properties that a person may own throughout a city.

4. Click Get Started!

- □ Enter Basic Property Information including the building name, address, year built, occupancy and gross floor area (not including parking). Under the "Do any of these apply?" section.
  - 1. If parking IS served by an energy meter connected to the building it serves, SELECT "My property's energy consumption includes parking areas".
  - If parking served by an energy meter NOT connected to the building it serves (i.e. it is on a separate meter), DO NOT select "My property's energy consumption includes parking areas".
  - 3. Check other options that apply.
- □ Click **Continue**.
- On the next page, enter details about the primary building use, and additional property uses, based on the boxes checked on the prior page.
- The specific use details required will differ based on the property type selected.
   Refer to the Property Use Details Worksheet for ENERGY STAR Eligible
   Buildings in the Appendix of this guide.

1. Hover the computer mouse over each property use characteristic for definitions.



**Tip** Space Uses should be summarized to reflect the total square footage of any given space type. All retail square footage should be added together, as well as office, restaurant, multifamily, etc.

- 2. Actual values for space details (i.e. operating hours, number of bedrooms, etc.) are required for reporting. **Do not** use "default values".
- 3. The **Gross Floor Area (GFA)** that you entered when setting up your property will automatically populate into the GFA section.
  - **NOTE** If your property has multiple uses, you may want to adjust this number based on the actual GFA for the primary type of use. (Example: The building's primary function is office and the total GFA of the whole building is 30,000 sf. It also has some retail stores totaling 10,000 sf.) When entering the attributes for the primary space type (office), change GFA to reflect JUST the office space: 20,000 sf. Next click "Add Another Type of Use" to enter the attributes and remaining square footage for the building's retail space.

## Additional Uses?

□ Add more space uses to your property by selecting an option in the drop down menu **Add Another Type of Use**, and then click "Add". This will open up a different list of attributes for that particular space type.

## **STEP 3** Obtain Energy Meter Usage Data

#### Data Exchange

Seattle City Light (SCL), Puget Sound Energy (PSE), and Enwave Seattle (Steam) can upload whole building data to your Portfolio Manager account every month via Portfolio Manager data exchange (web services). NOTE: This service was formerly called Automated Benchmarking or ABS.

#### **Utility Contact Information**

#### Seattle City Light - See page 7

*Email* scl\_portfolio\_manager@seattle.gov *Phone* (206) 684-7557 *Website* www.seattle.gov/light/accounts/energyusage

#### Puget Sound Energy - See page 11

- Email mydata@pse.com Phone (425) 424-6486
- *Website* http://mydata.pse.com

#### Enwave Seattle (formerly Seattle Steam) - See page 16

- *Email* pdlesk@utlitystudio.com
- Phone 847-420-6432
- Website www.enwaveseattle.com/energy-star-reporting.htm

#### **Manual Meter Entry**

If only few energy meters serve your building, or you want to track energy use closely by tenant or meter AND have access to all the bills, another option is to enter the monthly energy use by month into your Portfolio Manager account. Manual meter entry can be used for some or all of your utility services. For example, data exchange could be used for City Light electric, but Enwave could be manually entered.

Manual Meter Entry instructions are in the Appendix.

## **3A SEATTLE CITY LIGHT DATA EXCHANGE**



Phone: (206) 684-7557
Email: scl\_portfolio\_manager@seattle.gov
Website: www.seattle.gov/light/accounts/energyusage

#### 1. Fill Out & Submit Consumption Request Form

- Visit www.seattle.gov/light/accounts/energyusage to complete and send the Portfolio Manager Automated Benchmarking Consumption Request form and agree to the Terms and Conditions.
- □ Your Request form will be processed within four business days. Look in your email for the **Automated Benchmarking Authorization** form from SCL.

#### 2. Authorization and Connecting to SCL

**IMPORTANT:** These screenshots supplement the instructions provided on SCL's **Automated Benchmarking Authorization** form, which you must have to proceed.

- □ Log in to Portfolio Manager with the Authorized Portfolio Manager Username listed on your Seattle City Light Authorization form.
- □ If you have not previously added SCL as a contact, you will need to add them:
  - 1. Click the **contacts** link in the upper right hand corner, then, leaving the search box empty, click the Search button.

ENER INTROVISIAN PO	rtfolio	Manag	er®		Welcome building123: <u>Account Setting115</u>	Contacts   Help   Sion Out
MyPortfolio	Sharing	Planning	Reporting	Recognition		
Your Search	Criteria		Anthon NOT A	y Sclafani VAILABLE with NORESC	0	Connect
Name:	SCL		🕵 Anthon Manag		ent with Apollo Solutions Group	Connect
Usemame:				off (SCL Test) VAILABLE with SCL_Tes	t	Connect
Email Address:				Pedescleaux Management Specialist	with General Services Administration	Connect
		Search		tfolio_Manager City Light with Seattle	City Light	Connect
				STCUST3	11072	Connect

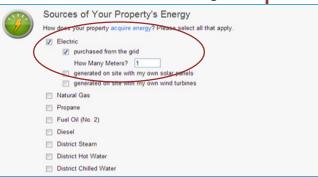
- 2. Under **Your Search Criteria**, enter **SCL** as Name. Enter or click Search.
- 3. From the list of contacts, locate SCL Portfolio\_Manager.
- 4. Click the **Connect** button to the right of the name.
- 5. When prompted, enter your **Portfolio Manager Username in all uppercase letters,** check the Terms of Use and then **Send Connection Request** button.
- 6. This connection request should be accepted in approximately 1 hour. **Please wait before proceeding.**

#### 3. Connection Approval and Virtual Meter Setup

- □ In Portfolio Manager, on the **MyPortfolio** tab, under the **My Properties** section, click on the name of the building that has the meter you are setting up.
- □ Still on **MyPortfolio** tab, click the **Energy** tab, then click **Add A Meter**.

Summary Details Energy	Goals Design
Meter Summary 2 Energy Meters Total	Energy Use by Calendar Month
2 - Used to Compute Metrics	4008
Add A Meter	
Current Energy Date Dec 31, 2015 Enter Your Bills	
Four Ways to Enter Bill Data	<ul> <li>Natural Gas → Electric - Grid</li> </ul>
1. Manually 2. Use our simple spreadsheet (one	
meter) to upload or Copy/Paste	Export Data by Calendar Month
<ol> <li>Use our <u>complex spreadsheet</u> (multiple meters + multiple properties)</li> </ol>	Meters - Used to Compute Metrics (2) Add A Meter Change Meter Selections
<ol> <li>Find an organization to electronically enter your data into Portfolio Manager</li> </ol>	A Yew as a Diagram
	Name Meter ID         Energy Type         Most Recent Bill Date         In Use? (Inactive Date)
Your Property is: Edit	Electric Grid Meter Electric - Grid 12/31/2015 Yes
A Single Building	Natural Gas 12/31/2015 Yes

- □ In the **Get Started Setting Up Meters** section, answer the questions:
  - 1. Under Sources of Your Property's Energy check Electric and purchased from the grid.
  - 2. For How Many Meters? Enter 1.
  - 3. Scroll down below the Water Usage section and click Get Started!



- □ On the next page, in the **Meter Name** column, click on the words: **Electric Grid Meter**.
  - 1. Replace the words: **Electric Grid Meter** with the **Virtual Meter Name** that SCL provided on the authorization form.
  - 2. Under Units, select kWh (thousand kilowatt hours).
  - 3. Under **Date Meter Became Active**, type in: **01/01/2009.** (Leave "Inactive" date blank and "Enter as Delivery" un-checked.)

Meter Name	Туре	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
1234_broadway_st_0	Electric - Grid		kWh (thousand 💌	09/25/2013	V		

**Tip:** Copy the Virtual Meter name directly from the SCL authorization form and paste it to reduce typos.

- 4. Click Create Meters.
- 5. Click **Continue**.
- □ On Select Energy Meters to Include in Metrics page:
  - 1. Check all of the meters.

If you have sub-meters to measure

energy or water consumption for a

those meters would double count your consumption and skew your

specific purpose, and you also have a master meter (which measures total consumption), counting both of

2. Select: These meter(s) account for the total energy consumption for this property.

\* 
 These meter(s) account for the total energy consumption for <u>85 Unit WS Building</u> (a single

These meter(s) do not account for the total energy consumption for <u>85 Unit WS Building</u> (a single

3. At the bottom of the screen, click the **Apply Selections** button.

Summary	Er	nergy	Meters		
2		lect all sub-m		in your Energy r	netrics. (Hint: All meters should be included unless the
Meters representing the		~	Name Meter ID	Туре	
total energy consumption for <u>85 Unit WS Building</u> (a single building).			Natural Gas 25794037	Natural Gas	
			Electric Grid Meter 25794064	Electric - Grid	

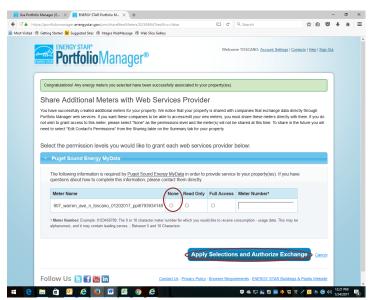
#### 4. Select Permission Levels for Other Web Services Providers

building).

building)

If you are using other automated data services (such as Seattle City Light), then you will be given the option to allow other utilities to view your PSE meter data.

- On the Share Additional Meters with Web Services Provider page, select "None" on the Puget Sound Energy MyData tab.
- □ Select Apply Selections and Authorize Exchange.



#### 5. Share Property with Seattle City Light

- Go to the Sharing Tab and click Share (or Edit Access to) a Property.
  - 1. Select **One Property** and then choose the building to connect to SCL.
  - 2. Select contact, SCL Portfolio Manager
  - 3. Under **Choose Permissions,** select the second option: "Personalized Sharing & Exchange Data."
  - 4. Click **Continue**.

	Select Properties         Well get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?         One Property       Image: Construction of the level of access later. For now, which properties do you want to share and/or edit access to?
<b>2</b>	Select People (Accounts) Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page. Select contacts from my contacts book: City of Seattle Annual Reporting (SEATTLE.GOV) SCL Portfolio_Manager (SCL_PORTFOLIO_MANAGER)
(?) Help	To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.

- □ On the next screen, select the **Exchange Data** button, which will pop-up the Access Permissions window.
  - In the pop-up window, enter the Premise ID number found at the top of your SCL Authorization Form. You need to enter the Premise ID number in TWO places as shown below.

remiseID:	-	Exam	nple: 1234567890			
	Parent Premise Information	D associated with the pro	perty and is provid	led by SCL Portfolio Manager or S	SCL Representative.; 1 - 10 Characters	More
elect the permission level belo	w that you wo	uld like to grant SCL P	ortfolio Manage	r for each category.		
Item	None	Read Only Access	Full Access	PremiseID <sup>1</sup>		^
Property Information	0	0	0			
Property Information All Meter Information	0	0	0			
	0	0	0			
	0	0	0	[	-	

- 2. IMPORTANT: Set the Access Permissions exactly as follows:
  - Property Information: Read Only Access
  - SCL Virtual Meter Name: Full Access
  - For any other meters listed: None
  - Goals, Improvements: None
  - Recognition: None
- 3. Scroll down. For Share Forward, select "No".
- 4. Scroll down the window and click **Apply Selections & Authorize Exchange.**
- □ This will open the Sharing window again. Click on the **Share Property(ies)** button to finish.
- You should see data in your Virtual Meter in about four hours. Thereafter, SCL will update this meter monthly.

## **3B PUGET SOUND ENERGY "MYDATA"**



Phone: (425) 424-6486 Fax: (425) 462-3418 Email: mydata@pse.com Website: http://pse.com/accountsandservices/YourProperty/Pages/Automated-Benchmarking.aspx

**PSE CUSTOMERS:** These instructions will show you how to enroll in PSE MyData to obtain your buildings natural gas usage history. MyData will also provide automated monthly uploads of gas usage thereafter once enrolled.

#### 1. Add PSE as a Contact

- If you have not previously added PSE as a contact, you will need to add them:
   1. Click the Contacts link in the upper right hand corner.
  - 2. Click on **Add Contact.**

This is where you keep to	ack of your contacts and/o	r organizations (i.e. people or companies a	associated with your properties such a
		re information). You can add anyone as a	
and you can chara your i	ronortios & ronorte with an	w of your contacts. You can import other P	Portfolio Manager users directly into yo
		ly of your contacts. Tou can import outer r	on and an age about an early may ju
their accounts and sendir		y of your contacts. Tou can import other r	
their accounts and sendi			

- 3. Enter **ESIOPERATOR** as the Username. Click **Search**.
- 4. From the list choose **Puget Sound Energy MyData**. Click the **Connect** button.
- 5. Review **Terms of Use**, 'check the box' and click **Send Connection Request**.
- 6. This connection request should be accepted in less than 1 hour.

#### 2. Share Your Building with PSE

- Go to the Sharing Tab and click on Share (or Edit Access to a Property).
- □ Select the properties to share with **Puget Sound Energy MyData**.
- Under Choose Permissions, select the second option:
   "Personalized Sharing & Exchange Data." Click Continue.
- On the next screen, select the Exchange Data button, which will pop-up the Access Permissions window.

lame (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Da
TEST Office (4132890)					
Puget Sound Energy MyData	O				0

**IMPORTANT:** 

PSE requires release forms if you have four (4) or fewer tenants in your building that each receive PSE service. Each account holder must complete and sign the PSE Customer Data Release Form. We recommend downloading the form now, as it may take time to contact all tenants.

- □ **IMPORTANT:** Select the Access Permissions as follows:
  - 1. Property Information: **Full Access** (PSE requires Full Access so that they can create a new meter in your account.)
  - 2. All Meter Information: Leave as **None**. (Choose None for access, even if old PSE meters are listed. Leave any meters numbers as is.)
  - 3. Goals, Improvements: Leave as None
  - 4. Recognition: Leave as None

tem	None	Read Only Access	Full Access
Property Information	0	0	(•)
All Meter Information			$\bigcirc$
Goals, Improvements, & Checklists		0	0
Recognition	۲		0

- □ Scroll down. For **Share Forward**, select "No".
- □ Click **Apply Selections & Authorize Connection**.
- □ This will open the **Sharing** window again. Click on the **Share Property(ies)** button to complete the sharing process.

IMPORTANT: Your sharing request should be accepted by PSE in approximately 1 hour. Do not start the next step until MyData, Puget Sound Energy is listed as having Exchange Data permisions in Portfolio Manager, as shown below.

My Shared Properties (2)	Sharing Notifications (10)						
	</td <td>New Electric Meter - Share accept</td> <td>Clear</td>	New Electric Meter - Share accept	Clear				
Share a Property	<-	Ocean Vista Offices - Share acce MyData	pled by Puget Sound	Energy	Clear		
Exchanging Data	41	Natural Gas - Share accepted by	Puget Sound Energy	MyData	Clear		
gularly upload your data into Portfolio Manager? You an authorize these companies to update your meters, arnage building data, and retrieve metrics. b get started, search for organizations that exchange	-	Shared Properties (2) by: Property Name			Share a Propert		
ta. Then connect with them and share your properties.		Name	Permissions	Action			
earn more about exchanging data,	*	Ocean Vista Offices	Exchange Data				
		Annual Reporting, City of Seattle	Exchange Data	I want to			

**CAUTION!** Any non-PSE meters, such as City Light electric must be listed as None for access.

> HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484 In person help by appointment.

#### 3. Create a New Account in PSE's MyData

#### Go to mydata.pse.com

- □ Read the new user information and click the **Register** button.
- Answer Yes to both questions:
   1. Will you be reporting any usage data to EnergyStar's Portfolio Manager?

MyData	
Sign In	New User?
Ownene: Pessword:	MyClata is a free web-based tool offered by PSE that allows building evenes, managers and operation to thack and assess energy communption of their buildings. By registrating your property, you will be a so of or what is becoming in industry standard and will receive quick and excarate deal on a monthly basis for your entire building. This tol will enable you to comply with state regulations including required registration free for <u>all clears</u> and <u>and and and and and and and and and and </u>
Submit	IMPORTANT - Users who wish to report their energy usage data through Energy Star Portfolio Manager must have a Portfolio Manager account set up before registering in MyOata.
Second your panaword? Second your username?	<ul> <li>If you have not set up your PM account yet, go to the <u>Derry. Star mabular</u> to register and lobox instructions in the Carl of dearmins I New To Galache. In 6 hird the galache, pit is the Carly <u>Hord to Comply</u> page, and locate the How To Galde init under the heading First Time Reporting?.</li> </ul>
	<ul> <li>If you have an existing FM account, on the same <u>Book is Compty</u> page locate Enroll is PEE MyClata under the havehaning Updating an Belonging that Begoented Last Year. The diskon the instructions there. This tells you have to resultance and reconnect with PEE before registering in MyCata.</li> </ul>
	To help you obtain your building's energy usage data from PSE, please follow the instructions provided in the <u>MyQata User Guide</u> .
	Register

2. Do you have an EnergyStar Portfolio Manager account?

Sign in with your existing Portfolio Manager
 Username and Password.

 If you connected to PSE and shared properties and waited for PSE to accept the shares, your account contact information should automatically populate on the Registration page. PSE will email you using this information, so make corrections.
 If it does not populate, stop and contact PSE at 425-424-6486 or email mydata@pse.com.

	gistration notes a required field
	you be reporting any usage data to Energy Star's Portfolio Manager? * (* $\bigcirc$ No
	rou have an Energy Star Portfolio Manager account? * $r_{es} \odot \kappa_o$
Lin	k My Energy Star Account
will	FE: By linking to your Energy Star Portfolio Manager Account here, MyD be able to retrieve your information and streamline the process of openie MyData account.
	ase make sure that you have reauthorized and reconnected with PS ough your Portfolio Manager Account before you sign-in here.
Ene	rgy Star Portfolio Manager Username:*
Ene	rgy Star Portfolio Manager Password:*
	Sign In
	sign in

- After completing MyData registration, check your email for a message from MyData to activate your account. Click the link in the email to go back to MyData.
- □ Now in **MyData**, click the Next button.
  - 1. The properties shared from Portfolio Manager should all be listed on the Building Information page.

2. If your properties are not listed, stop and contact PSE at 425-424-6486 or email <u>mydata@pse.com</u>. Do not click "Add a New Building."

yData	
aliding information	O O Orang 2 of 2 - Dualiting Internation
St new building By Building Hair Celler These school alities maker resettens or aliticmus: TOTO School Celler Toto School Celler School Ce	On this gap you will provid shared having inferentian. You can see your Bouring Status Brain. Manno molitone Can be been stress or the <u>utility Mill or the brain</u> teerf. Sharey of the sear resolvers to the utility brain generating you work in date for Pause enveloped to the utility and and the three matters indicated to it interceturity and straining and Athematic
All souther name	Private the address that here identicity the transmission of the state of address of the text defense of whether address and the state of the state
had bulleng	Aller yna twa antentiet yne halfer effenntien. It wil ne edderal yn fern yn er de onneer ar en en wit wit hi'r 1 is hannen ei fan Sin yn en ei gyn hi Myfata ant ongan ei fang i e'r 1 Sinn yn ei ei enne yne haiting nammen yn ei wielu yna regering pelloness
turenal Olex Nama unfort utber meter meteren er addressen. * – © Meter metereligij – © Addressjog	Building Building The Dubling In-Strapping The Dubling In-Strapping

On the Building Information page, click
 Show Details (in the orange bar) to see the details of each building.
 Select Meter numbers and enter any meter numbers that are not listed.
 Alternatively, you may select
 Address(es) and enter the addresses or range of addresses for the building.
 If you need to go get information, you can click Save and come back later to finish.

□ When done entering the information, click **Submit**.

1. **MyData should email you** in up to 3-4 days to invite you back to review the building information and select report preferences.

After you are emailed that the building is ready, go back to MyData and click on Show Details (in the orange bar) to see the details of each building.
 In the blue box, select Whole Building, Monthly and Post to EnergyStar. (These will likely be the default selections).
 Confirm addresses and mater numbers. If anything is incorrect or missing.

2. Confirm addresses and meter numbers. If anything is incorrect or missing, contact PSE.

□ If asked for, download & complete any required **release forms** and upload them. *PSE requires release forms for buildings with fewer than 5 tenants. For questions about this requirement, please contact PSE.* 

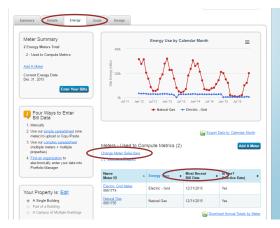
My Bank	(Plide Details)	E
his building has been created and is ready fo	or your review. Please choose your report preferences and complete your request.	
	Status: Release Forms Required	
Please choose how you prefer to re Individual lifeters * Whole Ba Reporting Options: * Monthly O One Time Only Post to Energy Star		
· Confirm the addresses and meter	er numbers below accurately represent your building. clicking Submit to complete your request. We require a release form for this towart.	
Tenant A	clicking Submit to complete your request.	
Confirm the addresses and meter	clicking Submit to complete your request. We require a release form for this towart.	
Tenant Duit Name: Tenant A 123 MAIN ST, FEDERAL, WAY 90003	clicking Submit to complete your request. We require a release form for this tenant, Download blank release form Lipicad completed release form	
Tenant/Unit Name: Tenant/Unit Name: Tenant A 123 MAIN ST, FEDERAL, WAY 90003 Delete Address	elicking Submit to complete your request. We require a release form for this towart. Download blank release form 19/075690432 We require a release form for this towart. Download blank release form	
Contiem the addresses and meter bornuy Bi in the Tenant/Unit Name: Tenant/Unit Name: 123 MAN ST, FEDERAL WAY 98003 Dates Address Tenant/Unit Name:	clicking Submit to complete your request. We require a release form for this tenant, Download blank release form Upload completed release form IN075696432 We require a selease form for this tenant,	

- □ When complete, click **Submit**. PSE will prepare your usage report and email you when it is complete. Please allow up to three days.
- □ If you do not get an email, contact PSE's User Support at 425-424-6486 or email <u>mydata@pse.com</u>.

#### 4. Configure New PSE Meter in Portfolio Manager

After MyData is set up, PSE should add a new gas meter to your Portfolio Manager account called **MyData Usage - GAS** meter. This step shows how to log into your Portfolio Manager account to make sure the new PSE MyData Usage - GAS meter is listed and configure it to obtain the building's required EUI.

- □ Log back into Portfolio Manager and click on the property to open.
- □ On the Energy tab, look for a meter named PSE MyData Usage GAS.
- □ Check that the **Most Recent Bill Date** lists a date within the last two months.



- □ On that same page, click **Change Meter Selections**.
  - 1. Under **Energy Meters**, add a check mark to include **PSE MyData Usage-GAS** in the energy metrics. IMPORTANT: A check should also be next to the electric and any other energy meters *currently serving* the building. If there are other previously entered PSE meters that are now included in the new PSE MyData Meter, uncheck them. You may also consider deleting these "old" PSE meters.
  - 2. Select "These meter(s) account for the total energy consumption of this property."
  - 3. Click **Apply Selections**.

Summary	Energy Meters Select all meters to be included in your Energy metrics. (Hint: All meters should be included unless they						
2	are <u>sub-m</u>	eters.)		······			
Meters representing the		Name Meter ID	Туре				
total energy consumption for <u>Test High Use</u> <u>Apartments (ID 49769</u> ) (a	×	Electric Grid Meter 8861774	Electric - Grid				
single building).	$\odot$	Natural Gas 8861795	Natural Gas				
About Sub-meters you have sub-meters to measure nergy or water consumption for a opefice purpose, and you also have master meter (which measures tal consumption, counting but of cose meters would double count put or consumption and skew your uero rosting theory to entensity), earn More about configuring which sho put consumption when sho part formate metrics.	•O(a) • Th	single building).	for the total ene	nts: rgy consumption for <u>Test High Use Apartments (ID 49769</u> ) tal energy consumption for <u>Test High Use Apartments (ID</u>			

HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484 In person help by appointment.

#### 5. Select Permission Levels for Other Web Services Providers

If you are using other automated data services (such as Seattle City Light), then you will be given the option to allow other utilities to view your PSE meter data.

- On the Share Additional Meters with Web Services Provider page, select "None" on the Puget Sound Energy MyData tab.
- □ Select Apply Selections and Authorize Exchange.

https://p/	ortfoliomanager.energystar.gov/pm/shareNewMeters/523666	4?testEnv=false	C C	Q. Search		ĥ		
	ing Started 🕨 Suggested Sites 🛞 Integra WebMessage 🛞 Web Sli			1 3 2 3 7 6 7	pq to			
Energy S	Portfolio Manager®		Welcor	ne TOSCANO: <u>Account Settings   Cont</u>	acts   <u>Help</u>	<u>Sig</u>	<u>m Out</u>	
C	ongratulations! Any energy meters you selected have been	successfully associated to you	r property(ies).					
Sł	hare Additional Meters with Web	Services Provide	er					
	have successfully created additional meters for your prope							
	tfolio Manager web services. If you want these companies to wish to grant access to this meter, please select "None" as t							
nee	ed to select "Edit Contact's Permissions" from the Sharing tat	ble on the Summary tab for you	r property.					
	lost the permission levels you would like to	grant each web convid	oc providor	balow:				
Se	elect the permission levels you would like to	grant each web servic	es provider	below:				
Se	lect the permission levels you would like to Puget Sound Energy MyData	grant each web servic	es provider	below:				
Se		I Energy MyData in order to			)			
Se	Puget Sound Energy MyData The following information is required by <u>Puget Sounc</u>	I Energy MyData in order to	provide service		3			
Se	Puget Sound Energy MyData The following information is required by Puget Sound questions about how to complete this information, plr	Energy MyData in order to pase contact them directly.	provide service	to your property(ies). If you have	3			
Se	Puget Sound Energy MyData The following information is required by <u>Puget Sound</u> questions about how to complete this information, plo Meter Name	Energy MyData in order to base contact them directly. None Read Only 34148 0	Full Access	to your property(ies). If you have	3			
Se	Puget Sound Energy MyData The following information is required by Puget Sound questions about how to complete this information, plit Meter Name 907_warren_ave_n_loscano_01202017_ppi679333 1 Meter Number: Example: 0123456789; The 9 or 10 characte	Energy MyData in order to base contact them directly. None Read Only 34148 0	Full Access	to your property(ies). If you have	3			
Se	Puget Sound Energy MyData The following information is required by Puget Sound questions about how to complete this information, plit Meter Name 907_warren_ave_n_loscano_01202017_ppi679333 1 Meter Number: Example: 0123456789; The 9 or 10 characte	Energy MyData in order to asse contact them directly. Read Only 34148 14148 1416 1416 1417 1418	Full Access	to your property(ies). If you have		Cance	<u>e</u>	
	Puget Sound Energy MyData The following information is required by Puget Sound questions about how to complete this information, plit Meter Name 907_warren_ave_n_loscano_01202017_ppi679333 1 Meter Number: Example: 0123456789; The 9 or 10 characte	LEnergy MyData in order to asse contact them directly. None Read Only 34148 O	Full Access	to your property(ies). If you have Meter Number1 Consumption - usage data. This may be	nge o			

## **3C ENWAVE SEATTLE (SEATTLE STEAM) DATA EXCHANGE**



Phone(206) 658-2025Websitewww.enwaveseattle.com/energy-star-reporting.htmEmailmlowe@EnwaveSeattle.com

**ENWAVE SEATTLE CUSTOMERS:** You will need to complete a few simple steps to begin automated Portfolio Manager reporting with Enwave Seattle. Detailed instructions can be found in your online Enwave Seattle customer portal.

- Log in to your online Enwave Seattle/UtilityStudio account and complete the Enwave Seattle Authorization Agreement, in the "ENERGY STAR Reporting" link. If you do not know your username and password for your Enwave Seattle account, or if you have any questions, please contact Marco Lowe at Enwave Seattle, at 206-623-6366, or mlowe@EnwaveSeattle.com.
- □ In ENERGY STAR Portfolio Manager (PM) create your account and complete the setup for your facility. In this step, you will create the steam meters that represent all of your steam usage in your facility. If you are a multi-site account, you will create a facility and meter setup for each building in your account. If you already have a PM account, please confirm your steam meter setup, for each facility.
- When defining your steam meters in PM, create meters for EACH billing meter listed on your Enwave Seattle invoice, including any meters listed as Non-Metered. Define each meter, using the Energy Type = District Steam and the Units = kLbs.
- □ In your PM account, add a CONTACT to establish a connection with Enwave Seattle Energy Star Reporting Services.
- □ Request Data Exchange Services by "Sharing" your property and setting permissions for each steam meter to "Full Access".
- □ You will receive confirmation of your request from Portfolio Manager and Enwave Seattle. Reporting will begin for your facility by the 15<sup>th</sup> day of the next billing month. Enwave Seattle will load the most recent 2 years of usage data for each meter, and will continue to update the steam meter usage data each month.

Continue to Step 4  $\rightarrow$ 

# **STEP 4** Confirm Energy Use Intensity (EUI)

A Site EUI ending December 31 for the required year must be available to report to the City. The EUI indicates the energy use per square foot per year (kBtu/sq. ft.) and can be used to compare the building's energy use to other similar building types.

- Under the property Summary tab, verify that the building has a Site EUI and ENERGY STAR score (if available) for Current (Dec 20xx) reporting year. Contact Help Desk if missing.
- □ The **ENERGY STAR score** must also be listed (if eligible) for your property type, such as Office, Multifamily (20+ units), Retail, Warehouse. See Appendix A.

Metrics Summary Change Time Period							
Metric	Dec 2014 /	Carrent (Dec 2015)	Change				
ENERGY STAR score (1-100)	76	76	N/A				
Source EUI (kBtu/ft²)	95.3	100.6	5.3(5.6%)				
Site EUI (kBtu/ft²)	30.3	32.0	1.7(5.6%)				
Energy Cost (\$)	17,535.24	17.628-00	92.76(0.5%				
Total GHG Emissions (Metric Tons CO2e)	113.7	120.0	6.3(5.5%)				

## **PRINT STATEMENT OF ENERGY PERFORMANCE**

- □ Go to the **Reporting** tab and choose **Statement of Energy Performance**.
- $\Box$  Select the property name.
- □ Select Timeframe: Single Year ending Dec of the required year.
- □ Select contacts (optional).
- □ Click **Generate & Download Report(s)** and a PDF of the report should appear. (If your web browser has pop-up blockers, disable them if the report does not appear.)
- □ Confirm that the **Statement of Energy Performance** lists a **Site EUI** for **Year Ending: December 31, [required year]**. (See next page for an example.)
- □ **Save** and print a copy for your records.

**NOTE** If the building *does not* have 12 months of utility data ending in that December, Portfolio Manager will generate an error message like this:

3 Select Timeframe	for Report(s)
	vear ending date that does not have 12 se select another date. * Single Year

If you get an error, and are sure that all the energy meters have a full year of data ending December 31st, contact the Help Desk for assistance.

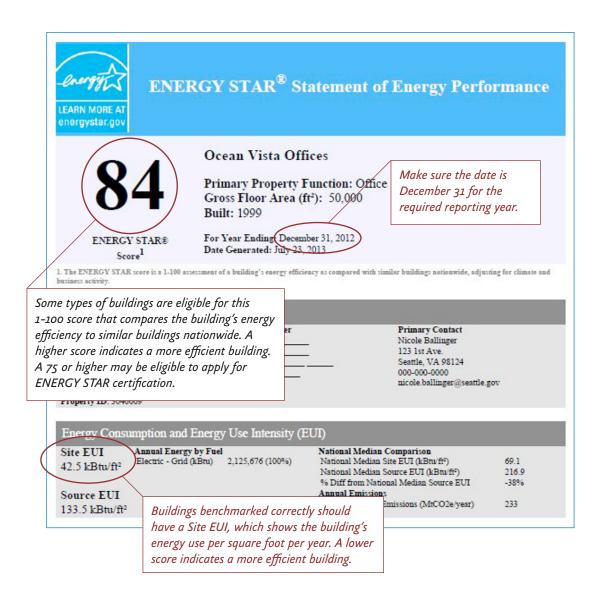
#### HELP DESK: EnergyBenchmarking@seattle.gov or (206) 727-8484 In person help by appointment.

Accurate Reporting: Buildings with unusually low or high (outlier) EUIs or other errors will be

or other errors will be flagged for accuracy and may be issued a warning letter to make corrections.

# **About the Statement Energy Performance**

The **Statement of Energy Performance** is a quick reference for sharing your building's energy use as indicated by the **Site EUI**—required by Seattle law of building owners if requested by current and future tenants, buyers or lenders. Although not required by Seattle, the document is also used to show ENERGY STAR-certified buildings when verified by a professional engineer.



Continue to Step  $5 \rightarrow$ 

# **STEP 5** Add the City of Seattle as a Contact

- □ Click on the **Contacts** link in the upper right hand corner of the screen.
- □ Click **Add a Contact** to search for users that you can connect with.
- □ In the **Username** field, type in "SEATTLE.GOV" and click search.
- □ From the Search Results page, select City of Seattle Annual Reporting and click connect.

ENER ENERGY STAR	GY STAR® rtfolio	Manag	er®		Welcome NICOLEBALL: <u>Account Setting</u> (Contacts) <u>Heip I Sion Out</u>
MyPortfolio	Sharing	Planning	Reporting	Recognition	
If they accept, you unconnected con	ur search are liste ou will see them li	isted as a connecte	ed contact in your : ing with contacts w	address book. If they do ill make it easier to show f Seattle Annual Reporti	asking them to confirm your request to add them as your contact. not accepted, or have not accepted yet, you will see them as an e preperty information wakes <u>Rottolia Manager</u> . In In Auring Ordinance with City of Seattle Annual Repo
Name:			Geo Phoet Energ		Supervisor with Seattle City Light Connect
Username:	SEATTLE.C	sov		14 <4 Page 1	of 1 🕞 🖂 10 🗨 1 - 2 of 2
Email Address		Searc	h		

- □ Fill in your Contact Name, Contact Email Address and Contact Phone Number.
- □ Agree to the Terms of Use and select **Send Connection Request**.
- □ **IMPORTANT** The City of Seattle processes new contact requests **hourly**. You will be sent a confirmation email when the City of Seattle accepts your request.

Portfo	lioManager™	Welcome NICOLEBALL: Account Settings   Contacts   Help   Stan
	nomanayer	
Send a Conne Data	ction Request to <u>City of Seattle</u>	Annual Reporting to Begin Exchanging
City of Seattle Annual Rep- complete this information, p		nge data with your property(les). If you have any questions about how to <i>ir</i> connection request has been accepted, you can share individual properties
Contact Name:	×	Example: John Smith
	First and last name of the contact associated with this accourt	nt ;- Characters
Contact Email Address:	•	Example: jsmith@youremail.com
	Please provide an email, so that we may contact you with que	estions or program updates :- Characters
Contact Phone:	*	Example: (206) 727-8484
	Please provide a phone number (including area code), so that	It we may contact you with questions.;- Characters
calculate Customer's bench of Customer, the annual re requirements of Section 22 electronically transfer such as such, Customer agrees santo, and tublichy pos performance will be referre Advidual or bublichy pos control annual energy consumption promptiy disclosed by the ( any exercise is discretion	mer's monthy utility billing data, and other data as may be marking data and raing. This information will help Custo porting of Customer's energy consumption data, building 250 of the Satelli Municipal Code and Diseator's Rule Di 250 of the Satelli Municipal Code and Diseator's Rule Di to release and hold harmises the Chy of Satelli from any tion or data form the EPA's ENERGY STARP Portfolio And it information about the energy performance of individual at information related to the Operational at anacteristic sess all energy data reported to the Chy of Satelli will be to any information related to the Operational at anacteristic any information rules the PRA or other that the specific reports as required under Seatells Municipal Code SINC- 71 you on request unless the PRA or other statute specific	quies information about Customer's facility (which Customer will provide required by DFAS-BENRGY STAR Portfolio Manager apropriation in order to mer track the energy unage and efficiency of its facilities, i authorize, on behalf square footage, and other characteristics as may be required to fulfill the R 2011 J also authorize, on behalf of Customer, the Chy of Seattle to pager application. This data transfer is at the request and on behalf of Customer anger application provides transfer is the request and on behalf of Customer anger application. This data transfer is at the request and on behalf of Customer anger application. This data that the Chy of the state of the disclosure of energy consumption information related to any single aggregated across an einthe building on sub-building. It will not include 22 902. The Public Records Act (PRA) requires that public records hubits the 22 way and a reasonable public records. Public records hubits of a data weensty tercords from disclosure will it is not a leagel displant, the Chy abject of the records, and allow a reasonable amount of time for the subject of the subject of the records and the subject of
Agreement:	* 🔄 I agree to my provider's ( <u>City of Seattle Annual F</u>	Reporting) Terms of Use.
		Send Connection Request Cancel

Once your request is accepted, continue to Step 5  $\rightarrow$ 

# **STEP 6 Share Building with the City of Seattle**

- □ After you are connected to City of Seattle Annual Reporting, **share your property** and associated meters with the City of Seattle.
- □ Go to the Sharing Tab and click Share (or Edit Access to) a Property.
- □ Select the properties to share with **City of Seattle Annual Reporting**.
- Under Choose Permissions, select the second option:
   "Personalized Sharing & Exchange Data." Click Continue.
- □ On the next screen, choose **Exchange Data** for each property.

MyPortfolio	Sharing	Planning	Reporting	Recognition	
Share Yo	ur Proper	tv(ies)			
		,	e vour property with	n someone else. May	be they nee
				gnition. If this sound	s like what
you'd like to sha	are and who you'd	like to share with	n them.		
	Salact Brong	erties to Share	0		
				For now, which prope	ntion do voi
	want to share?	details of the lev	er of access fater.	For now, which prope	enties do yo
	Multiple Propert	ies	Select Pre	operties	
			Selected Pro	perties: 2	
		- (0	to Change Mitt		
	· · · · · · · · · · · · · · · · · · ·		to Share With		
S.				e properties with? Th at on the next page.	ne access f
	Select contacts f	rom my contacts	book:		
(	Annual Reportin	ig, City of Seattle			
	steenson, john	ig, ony or occure			
	To as last as utilities	and the first of the second	T Cashal (CTRL)	key and click on each se	lasting Oak
	your connected cor			key and drok on each se	reation. Only

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
ID49690: TEST BUILDING 2 (3620234)					
Annual Reporting, City of Seattle	O				۰
ID49691: TEST BUILDING 3 (3620235)					
Annual Reporting, City of Seattle	0				•

□ On the Access Permissions page, enter the **City of Seattle Building ID** (this number is 1-5 digits and is not the Portfolio Manager Building ID). Find the number of the notification or warning letter. Contact the help desk if missing.

#### □ IMPORTANT: Select the Access Permissions as follows:

Property Information: **Read Only** All Meter Information: **Read Only** Goals, Improvements: **Read Only** Recognition: **Leave as None** 

		ing information in order to provide se o complete this information, please	
City of Seattle Energy Benchmarking Building ID:	* 49690	Example: 1147	
Please select the nermissio	Characters More Inform		ttle for ID49690
TEST BUILDING 2 for each o	n level you would like t ategory:	grant Annual Reporting, City of Sea	ttle for <u>ID49690;</u>
TEST BUILDING 2 for each o	n level you would like t ategory: None Rea		<u>ttle</u> for <u>ID49690:</u>
TEST BUILDING 2 for each o	n level you would like t ategory:	grant Annual Reporting, City of Sea	<u>ttle</u> for <u>ID49690;</u>
TEST BUILDING 2 for each o	n level you would like t ategory: None Rea	grant Annual Reporting, City of Sea	<u>ttle</u> for <u>ID49690:</u>

(You may need to scroll down to view all the information.)

□ Scroll down. For **Share Forward**, select "No".

**NOTE** If you have more than one building do the above steps for each building.

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
ID49690: TEST BUILDING 2 (3620234)					
Annual Reporting, City of Seattle	O				Edit
ID49691: TEST BUILDING 3 (3620235)					
Annual Reporting, City of Seattle	O				Edit

- □ Click Apply Selections & Authorize Exchange.
- □ When complete (for all buildings you are sharing), click **Share Property(ies)** again.
- **Tomorrow**, look for a confirmation email from the City for each building shared.

**NOTE** If you do not get an email tomorrow, please check your "spam" or "junk" folder for it. If missing, contact the Help Desk.

**IMPORTANT** It is the responsibility of the building owner on record to confirm accurate annual compliance. Reports with unusually low or high (outlier) EUIs or other errors will be flagged for accuracy and required to make corrections.

# Appendix B Entering Utility Data Manually into Portfolio Manager

If you only have a few meters serving your building and prefer to hand enter the data, this option may work. We don't recommend it for multifamily or commercial with many tenants, as you will need get permission from all tenants to collect their bills.

□ Log in to your **Portfolio Manager** account and click on your property.

ar Built: 1910 Edit			Deselle	- <b>-</b>
<u>cor</u>			Baselir	ne EUI: <u>N/A</u>
Summary Details Energy	Water Waste & Materials	Goals Desi	n	
Meter Summary 2 Energy Meters Total 2 - Used to Compute Metrics	Meters - Used to Co Change Meter Selections	mpute Metrics (2)		Add A Me
Add A Meter	Name Meter ID	<ul> <li>Energy Type</li> </ul>	Most Recent Bill Date \$	In Use? (Inactive Date)
	Electric Grid Meter			Yes
Current Energy Date Not Available	25794064	Electric - Grid		
	25794064	Electric - Grid		Yes

#### 1. Add Energy Meters

- □ In your Property Profile page, click on the **Energy** tab and select **Add A Meter**.
- □ Select the **types of fuel** in your facility. For each type, enter the number of meters for that type. Click **Get Started**.



□ On the **About Your Meters** section, click in the table to enter meter details.



#### □ Select the **correct unit** for the fuel type:

- 1. Seattle City Light Electric = kWh
- 2. Puget Sound Energy Natural Gas = Therms
- 3. Seattle Steam = kLbs
- □ **Enter the Date Meter Became Active**. This is the date that the first bill was issued for the meter. (Note: if you are unsure of the first bill date, use your best guess).
- □ Select **In Use** if the meter is currently in use.
  - □ Leave the **Date Meter Became Inactive** empty since meter is currently in use.
  - □ Only select **Enter as Delivery** if the energy source is delivered to you, such as fuel oil or propane from a truck, as opposed to metered usage.
- □ If you need to add another **meter**, select **Add Another Entry**.
- □ When done entering meters, click **Continue**.

Start Date	End Date	Usage	Cost	Estimation	Green Power
1/1/2012	2/1/2012	2500 kWh (thousand Watt-hours)	250		
02/02/2012	03/01/2012	3000 kWh (thousand Watt- hours)	\$ 300		

#### 2. Enter Energy Usage

- □ On the next page, click in the table to **enter the bill dates and usage** for each month (cost is optional). Click **Add Another Entry** to add more months.
- □ Once you have entered at least 12 consecutive months of data for the year required, click **Finish Meter Set Up**.
- □ On the next page, select the meter(s) to be included in the energy metrics.
- □ Then select "These meter(s) account for the total energy consumption for this property" and click **Apply Selections**.
- □ You will be taken back to the **Property Profile** page.
- □ **Continue with Steps 4-6** to finish benchmarking and report to the City of Seattle.

# Appendix C Resources

#### City of Seattle Energy Benchmarking Help Desk

<u>energybenchmarking@seattle.gov</u> (206) 727-8484

ENERGY STAR Portfolio Manager Login www.energystar.gov/portfoliomanager

Seattle Office of Sustainability and Environment (OSE) Energy Benchmarking website www.seattle.gov/EnergyBenchmarking

#### **Utility Contact Information**

#### Seattle City Light

Email	<u>scl_portfolio_manager@seattle.gov</u>
Phone	(206) 684-7557
Website	www.seattle.gov/light/accounts/energyusage

#### **Puget Sound Energy**

- Email mydata@pse.com
- *Phone* (425) 424-6486
- Website
   http://pse.com/accountsandservices/YourProperty/Pages/

   Automated-Benchmarking.aspx

#### **Enwave Seattle**

- *Email* <u>pdlesk@utlitystudio.com</u>
- Phone 847-420-6432 or (206) 623-6366
- Website www.enwaveseattle.com/energy-star-reporting.htm