

How to Benchmark Your Building

Instructions for Using ENERGY STAR®
Portfolio Manager and PG&E's Web Services



This document is a quick-start guide for enrolling in Pacific Gas and Electric Company's (PG&E) Web Services. For additional help, we suggest you refer to resources on the Portfolio Manager Overview, PG&E's Benchmarking Web site, and Portfolio Manager Online Help Web site.

OVERVIEW

ENERGY STAR® Portfolio Manager, an online service created by the Environmental Protection Agency (EPA), allows you to track the energy consumption of your facilities and compare them to similar buildings nationwide. Web Services makes it easier to use this tool by uploading meter data automatically to your Portfolio Manager account.

This guide will walk you through the process of benchmarking your building: how to register for a Portfolio Manager account, create a profile for your property, and enroll in Web Services. The troubleshooting section can help you identify and correct problems you may encounter with Web Services. You will also find detailed answers to many frequently asked questions at the end of the document.

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SECTION 1 | How to Register a Portfolio Manager Account

- 1.1 Go to the ENERGY STAR® Portfolio Manager Login page (www.energystar.gov/portfoliomanager) and click **Sign Up**. If you already have a User Name and Password, enter it below.

The screenshot shows the ENERGY STAR Portfolio Manager website. The top navigation bar includes the ENERGY STAR logo, search bar, and social media icons. Below the navigation bar, there are links for 'ENERGY EFFICIENT products', 'ENERGY SAVINGS at home', 'ENERGY EFFICIENT new homes', and 'ENERGY STRATEGIES FOR buildings & plants'. A breadcrumb trail reads: Home » Buildings & Plants » Facility owners and managers » Existing buildings » Use Portfolio Manager. A secondary navigation bar contains 'about us', 'press room', 'contact us', and 'portfolio manager login'. A third navigation bar lists 'Facility owners and managers', 'Service providers', 'Energy efficiency program administrators', 'Tools & Resources', and 'Training'. Below this, a sub-navigation bar highlights 'Existing buildings' and lists 'Commercial new construction', 'Industrial energy management', and 'Small business'. The main content area is titled 'Use Portfolio Manager' and includes a sidebar with 'IN THIS SECTION' containing links like 'Learn the benefits', 'Get started', and 'Use Portfolio Manager'. The main text describes the tool and includes a section 'Not sure if Portfolio Manager is for you?' with an orange arrow pointing to a 'SIGN UP' button highlighted in an orange box. To the right of the main text is a 'Discover the new and improved Portfolio Manager today.' section with a 'SIGN UP' button and a 'Current Portfolio Manager Users' section with 'username' and 'password' input fields and a 'LOG IN' button.

- 1.2 Fill out the required information (fields marked with red asterisk) and click **Create My Account**, which appears at the bottom of the screen after the security questions used to recover your account.

Note: Portfolio Manager's default is to enable others to search for your account to facilitate connecting with others.

The screenshot shows the 'Create an Account' form on the ENERGY STAR Portfolio Manager website. The form is titled 'Create an Account' and includes a 'Create Your Account' section with fields for 'Username:', 'Password:', and 'Confirm Password:'. The 'Password:' field has a red asterisk and a note: 'Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).'. Below this is an 'About Yourself' section with fields for 'First Name:', 'Last Name:', 'Job Title:', 'Email:', and 'Confirm Email:'. All these fields have red asterisks. To the right of the form is a 'Getting Started' section with a red asterisk and a note: 'Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.' Below this is an 'Accounts for Organizations' section with a red asterisk and a note: 'If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division'. The top right of the page has links for 'Help | Login' and 'Language: English | Français'. The bottom right of the page has the number '3'.

Phone:

Country:

Language:

Reporting Units: Conventional EPA Units (e.g., kBtu/ft²)
 Metric Units (e.g., GJ/m²)

Street Address:

City/Municipality:

State/Province:

Postal Code:

About Your Organization

Organization Name:

Primary Business or Service of Your Organization:

Is your organization an ENERGY STAR Partner? Yes
 No

Will you be using the web services API to develop software to exchange data with Portfolio Manager? Yes
 No

Searchability in Portfolio Manager

Can other people search for you and send you a connection request? Yes
 No

Recovering Access to Your Account

In the event that you forget your username or password, Portfolio Manager will ask for answers to your security questions to protect access to your account.

Security Question 1:

Your Answer:

Security Question 2:

Your Answer:



Create My Account [Cancel](#)

Primary Business or Service

If you have more than one "primary business," just pick the best option. Portfolio Manager will determine your category for a score based on the information, like square footage, that you enter for each of your property uses.

Web Services

EPA offers free web services designed to exchange property and meter data with Portfolio Manager. Using XML-based web services provided by the EPA, third-party energy service companies can securely provide energy and building data from their systems to Portfolio Manager in exchange for receiving the EPA's energy performance score and other related energy and environmental performance metrics. [Learn More](#)

Connecting with Others in Portfolio Manager

You can [connect with other people](#) in Portfolio Manager to easily share information. Your account must be searchable in order for others to send you a connection request.

Security Questions

Portfolio Manager will randomly select one of your security questions to verify your identity in specific situations, for example, if you forget your password.

- 1.3 On the Portfolio Manager log in page (www.energystar.gov/portfoliomanager), enter your User Name and Password and click **Log In**. You will be brought to the **My Portfolio** tab. The **My Portfolio** tab displays a summary of the properties in your portfolio.

SECTION 2 | How to Create a Property Profile

To benchmark your facility in Portfolio Manager, you will need to create a profile that has basic information about the property, how it is used, and the energy meters serving it.

- 2.1 Add a property by clicking **Add a Property** on the **My Portfolio** tab. You can also upload multiple properties by clicking the hyperlink at the bottom of the screen.

2.2 Enter your property's primary function, number of buildings, and construction status. Then click **Get Started!**

Welcome EEFG_MTJ_ENERGY: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!

Your Property's Primary Function

We'll get into the details later. For now, overall, what main purpose does your property serve?

Office

[Learn more about primary functions/property types.](#)

Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#). You can use our handy [data collection worksheet](#), in advance, to prepare the information that you will need to complete this process.

Your Property's Buildings

How many physical buildings do you consider part of your property?

None: My property is part of a building
 One: My property is a single building
 More than One: My property includes multiple buildings

How many?

Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
 Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.

Get Started! [Cancel](#)

2.3 Enter the property's name, address, and other general information and click **Continue**. **TIP:** Make sure the city name is accurate and spelled correctly – mistakes may cause an error in connecting with PG&E's Web Services.

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Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name:

Country:

Street Address:

Tip

The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

State/Province: *

Postal Code: *

Year Built: *

Gross Floor Area: * Temporary Value

Gross Floor Area is the total floor area, expressed in square feet or square meters, measured from the principal exterior surfaces of the building(s) and not including parking area(s).

Occupancy: * %

Do any of these apply?

- My property's energy consumption includes parking areas
- My property has a Data Center that requires a constant power load of 75 kW or more
- My property has one or more retail stores
- My property has one or more restaurants/cafeterias

Tip
Answering these simple questions will help us guide you in entering your property correctly.

2.4 Enter the specific information on how your building is used. The fields required will depend on the selection made in Section 2.2 for the building's **Primary Function**.

For example, if you indicated your building's **Primary Function** is **Office**, you would be asked to supply the Gross Floor Area, Weekly Operating Hours, Number of Computers, Number of Workers on Main Shift, Percent that can be Heated, and Percent that can be Cooled. If you indicated that your building had a Data Center or Parking, additional fields pertaining to these uses would also be required. Some space attributes, like "Gross Floor Area," are always required. Others may give you the option to "Use Default Value" (which inserts the national average for that attribute) or "Temporary Value" (which is your estimated value for that attribute) until you can collect and enter actual data for your facility. You can also rename the primary function by clicking **Edit** next to the Primary Use Type, which is **Office Use** in this example.

TIP: To get detailed descriptions of each space and its space attributes, click the **Help** link at the top right corner of the screen, select **Search the Knowledge Base**, then **Property Types** on the left-hand side menu. This will give you the definitions of each space type and attribute, default values, and answers to Frequently Asked Questions.

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Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

Basic Information

Name:	Demo Office Building 1	Country:	US
Primarily:	Office	Address:	100 Demo Drive Map It
Year Built:	2010		San Francisco, CA 94105

Property consists of: 1 building with parking

Add Another Type of Use

▼ Office Use [Edit Name](#)

Office refers to buildings used for the conduct of commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area should include all space within the building(s) including offices, conference rooms and auditoriums, kitchens used by staff, lobbies, fitness areas for staff, storage areas, stairways, and elevator shafts.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	* 540000 <input type="text"/> Sq. Ft. <input type="text"/>	01/01/2010 <input type="text"/>	<input type="checkbox"/>
Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010 <input type="text"/>	<input type="checkbox"/>
Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010 <input type="text"/>	<input type="checkbox"/>
Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010 <input type="text"/>	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010 <input type="text"/>	<input type="checkbox"/>
Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010 <input type="text"/>	<input type="checkbox"/>

Adding Another Type of Use

Portfolio Manager uses the term “Type of Use” to characterize the various spaces within a building. Your building may have one or more space types. For example, an office building might have occupied office space, a computer data center, and parking. Each of these should be entered as a separate “Type of Use” and will require different information. If more than 10% of a building’s gross floor area is vacant, the vacant square footage should be described as a distinct space type. Links to more information on how these space types are defined can be found in the Portfolio Manager Online Help section.

- 2.5 To add another space to your facility, click **Add Another Type of Use** and select the type of space you would like to add. Complete the required fields as you did in Section 2.4.

Add Another Type of Use

▼ Tenants 1 through 4 [Edit Name](#)

Office refers to buildings used for the conduct of commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area should include all space within the building(s) including offices, conference rooms and auditoriums, kitchens used by staff, lobbies, fitness areas for staff, storage areas, stairways, and elevator shafts.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	* 540000 <input type="text"/> Sq. Ft. <input type="text"/>	01/01/2010 <input type="text"/>	<input type="checkbox"/>
Weekly Operating Hours	65 <input type="text"/> <input type="checkbox"/> Use a default	01/01/2010 <input type="text"/>	<input type="checkbox"/>
Number of Computers	905 <input type="text"/> <input type="checkbox"/> Use a default	01/01/2010 <input type="text"/>	<input type="checkbox"/>

- 2.6 Continue with the procedure described in Section 2.5 until your building's gross floor area is completely entered. Make sure the sum of all spaces is equal to the total gross floor area of the facility. To finalize your entries, click **Add Property**.

Parking Use [Edit Name](#) Delete

Parking refers to buildings and lots used for parking vehicles. This includes open parking lots, parking structures that may be only partially enclosed, and fully-enclosed (or underground) parking structures. Parking structures may be free standing or may be physically connected to another building.

Property Use Detail	Value	Current As Of	Temporary Value
Open Parking Lot Size	* <input type="text"/> Sq. Ft. ▾	01/01/2010	<input type="checkbox"/>
Partially Enclosed Parking Garage Size	* <input type="text"/> Sq. Ft. ▾	01/01/2010	<input type="checkbox"/>
Completely Enclosed Parking Garage Size	* <input type="text"/> Sq. Ft. ▾	01/01/2010	<input type="checkbox"/>
Supplemental Heating	<input type="checkbox"/> <input type="checkbox"/> Use a default	01/01/2010	<input type="checkbox"/>

Back ➔ **Add Property** Cancel

- 2.7 After saving your entries, you will see a green bar at the top of the Summary tab, confirming you have successfully created your property. The next section will provide the steps to set up your building's energy meters.

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MyPortfolio [Sharing](#) [Planning](#) [Reporting](#) [Recognition](#)

Congratulations! You have successfully created your property. Next, would you like to: [add energy use information](#), so that you can see your energy performance metrics?

Demo Office Building_abridged
 100 Demo Drive, San Francisco, CA 94105 | [Map It](#)
 Portfolio Manager Property ID: 3636980 | Primary: Office
 Year Built: 2010

Weather-Normalized Source EUI (kBtu/ft²)
 Current EUI: [N/A](#)
 Baseline EUI: [N/A](#)

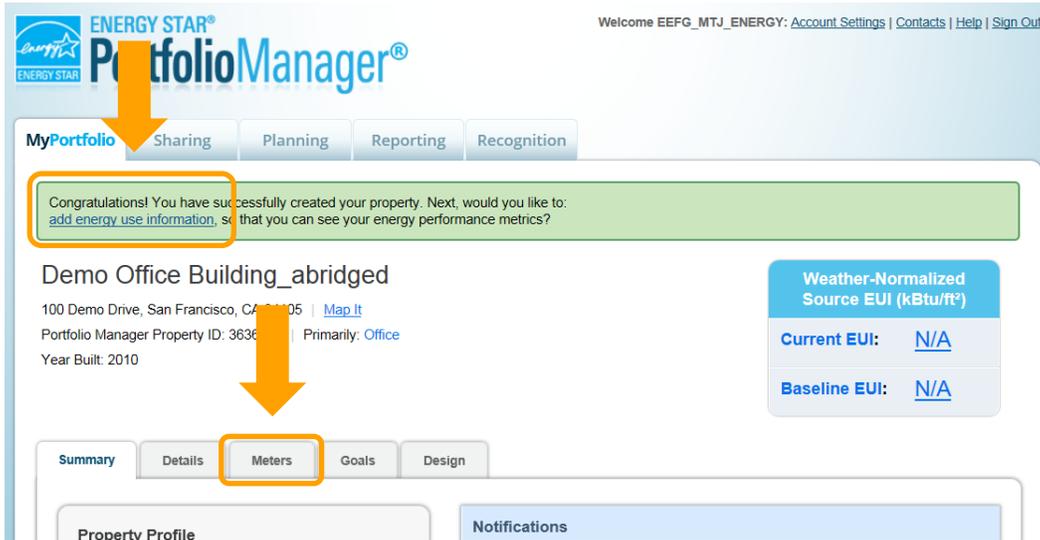
Summary [Details](#) [Meters](#) [Goals](#) [Design](#)

Property Profile Notifications

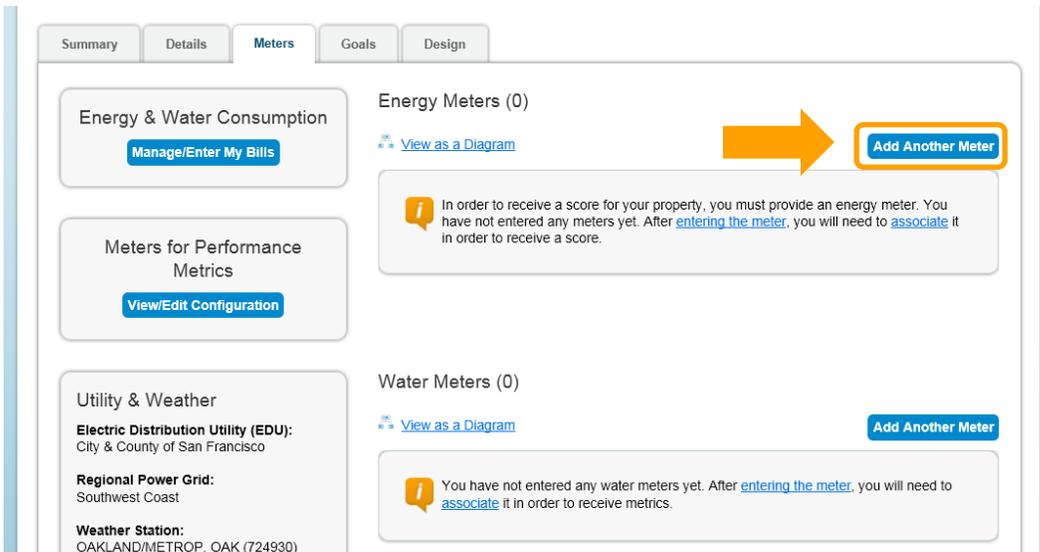
Setting up Energy Meters

You will need to add an Energy Meter to your property profile for each meter serving the building. For PG&E meters that you are signing up for Web Services, add one meter per Service ID/Meter Number. Refer to the Frequently Asked Questions at the end of this document for more information on locating the Service ID or Meter Number(s) on your PG&E bill.

- 2.8 To add a meter, you can either click the “add energy use information” link in the green bar, or click on the **Meters** tab.



- 2.9 On the next screen, click **Add Another Meter**.



2.10 Indicate the sources of your property's energy. As you select different fuels, additional fields will appear. For PG&E electric meters, you should select **purchased from the grid**. After you have filled out the required information about the meter(s), click **Get Started**.

Note: You may also track your property's water usage, but it is not required to benchmark your property and will not factor into your benchmark score.

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Get Started Setting Up Meters for Demo Office Building_abridged

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.

Sources of Your Property's Energy

How does your property acquire energy? Please select all that apply.

- Electric
 - purchased from the grid
 - How Many Meters?
 - generated on site with my own solar panels
 - generated on site with my own wind turbines
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water

Don't see your energy sources?
[+ See more energy sources?](#)

Your Property's Water Usage

How does your property use water? Please select all that apply.

- Municipally Supplied Potable Water
- Municipally Supplied Reclaimed Water
- Alternative Water Generated On-Site:
- Other:

Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an on-site solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

Entering Your Meters in Bulk

For advanced users, you may prefer to use the upload tool to [set up all of your meters with one click](#)

Automate Your Meter Entries

If you have a lot of meters, you may want to consider hiring an organization that exchanges data to automatically update your energy consumption. [Learn more](#)

Get Started! [Cancel](#)

- 2.11 Indicate the **Units** for each fuel type by **double-clicking** in the appropriate field and selecting the correct units in the drop-down menu that appears. Then, enter the date each meter was first billed. You can also rename any meter. If you have several electric and/or gas meters, it may be helpful to use the Meter Number as the **Meter Name**, or any meaningful descriptor like the location in the building. Then click **Continue**.

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About Your Meters for Demo Office Building_abridged

Enter the information below about your new meters. The meter's units and first bill date are required. You can also change the meter's name.

2 Energy Meters for Demo Office Building_abridged (click table to edit)

<input checked="" type="checkbox"/>	Meter Name	Type	Other Type	Units	First Bill Date	In Use?	Last Bill Date	Enter as Delivery?
<input checked="" type="checkbox"/>	Natural Gas	Natural Gas		therms	1/1/2011	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Electric Grid Meter	Electric - Grid		kWh		<input checked="" type="checkbox"/>		<input type="checkbox"/>

[Delete Selected Entries](#)
[Add Another Entry](#)

0 Water Meter for Demo Office Building_abridged (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	First Bill Date	In Use?	Last Bill Date
--------------------------	------------	------	------------	-------	-----------------	---------	----------------

[Delete Selected Entries](#)
[Add Another Entry](#)

Note: For PG&E meters, the unit of electricity should be **kWh**, and the unit of natural gas should be **therms**.

- 2.12 To add monthly meter entries manually, select **Click to add an entry**. You will then need to enter the billing **Start Date**, **End Date**, and **Usage** for each month. You can also upload an Excel spreadsheet to add multiple meter entries at once using the link at the bottom of the screen. However, if you intend to use PG&E's Web Services to upload your meter's historical data and usage automatically going forward, simply click **Finish Meter Set Up**.

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Your Meter Entries for Demo Office Building_abridged

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

2 Energy Meter(s) for Demo Office Building_abridged

▼ Natural Gas [Edit](#) [Delete Meter](#)

<input type="checkbox"/>	Start Date	End Date	Usage	Cost	Estimation
	Click to add an entry				

[Delete Selected Entries](#)
[Add Another Entry](#)

- 2.13 Indicate which meters should be used to calculate your building's energy metrics and whether or not the selected meters account for the building's entire energy consumption. After you have made your selections, click **Apply Selections**.

Meters to add to Total Consumption for Metrics for Demo Office Building_abridged

Tell us which meters to include when calculating the total usage for this property so that we can provide you with the most accurate metrics possible.

Property Totals

Energy Meters
Check the boxes for the meters that should be included in the energy metrics:

<input checked="" type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	Natural Gas
<input checked="" type="checkbox"/>	Electric Grid Meter

Total of 2 energy meter(s). Tell us what these meter(s) measure:

These meter(s) account for the total energy consumption for this property.
 These meter(s) do not account for the total energy consumption for this property.

Water Meters
There are currently no water meters entered for this property/building. [Enter information about your water meters](#) to begin tracking water usage alongside your energy usage.

i Because of the wide variety of ways that people meter their properties, after you create meters for your property in Portfolio Manager, you must indicate which meters to use for your property metrics. In some cases, you will not want a meter to count for your metrics. For example, if you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

Apply Selections [Cancel](#)

- 2.14 The Summary tab will have a green bar at the top, confirming you have successfully associated your meters with your property.

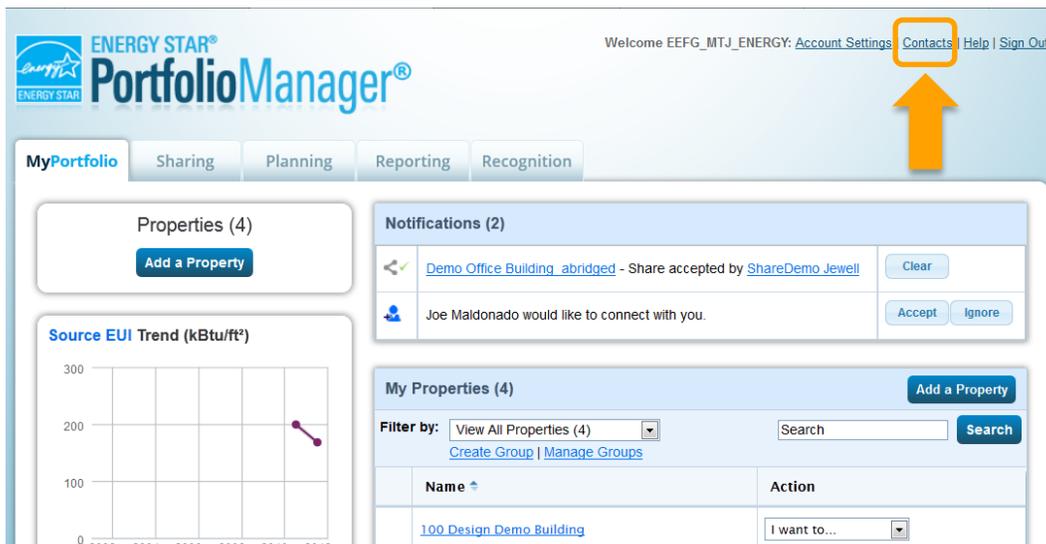
The screenshot shows the Energy Star Portfolio Manager interface for a property named "Demo Office Building_abridged". At the top, there is a navigation bar with tabs for "MyPortfolio", "Sharing", "Planning", "Reporting", and "Recognition". A green banner with a white border contains the message: "Congratulations! You have successfully associated meters to your property(ies).". Below this, the property details are listed: "100 Demo Drive, San Francisco, CA 94105", "Portfolio Manager Property ID: 3636980", and "Year Built: 2010". To the right, a box displays "Weather-Normalized Source EUI (kBtu/ft²)" with "Current EUI: N/A" and "Baseline EUI: N/A". At the bottom, the "Summary" tab is selected, showing a "Property Profile" section with a message: "You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about your property, including a photo." To the right of the profile is a "Notifications" section with a message: "Demo Office Building_abridged - Share accepted by Pacific Gas and Electric Company" and a "Clear" button.

SECTION 3 | How to Enroll in PG&E's Web Services

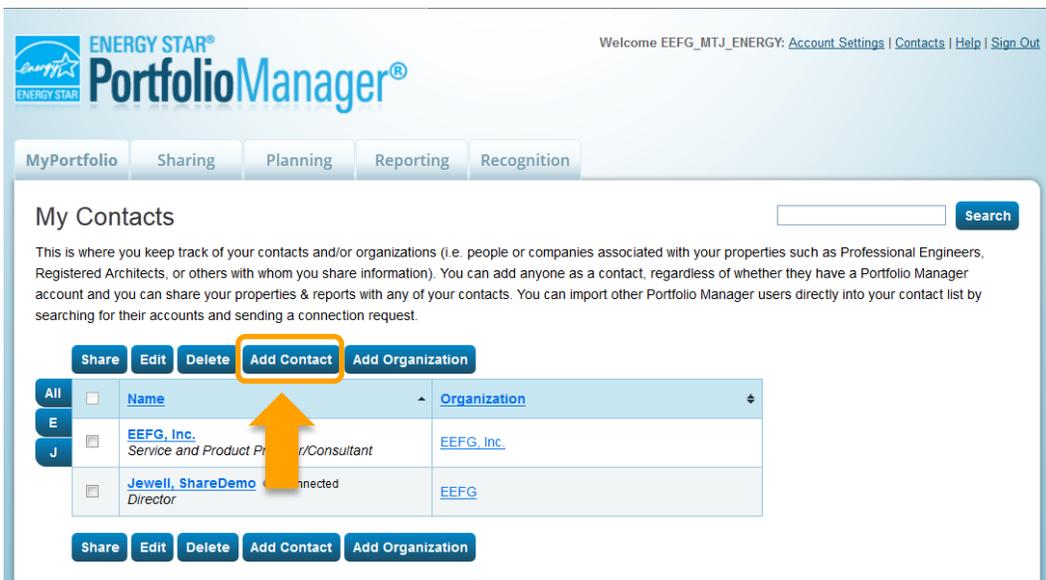
Before enrolling in PG&E's Web Services, make sure that:

- All of the meters have been added to the property profile.
- You have collected the Service ID or Meter Number for each meter.
- The city name is spelled correctly in the address for each property.
- Any manually entered meter data has been deleted if historical meter data from PG&E is desired. (Web Services will not populate meter entries prior to the most recent existing entry.)

3.1 To set up Web Services, the first step is to connect with PG&E as a contact. Click on the **Contacts** link on the top right hand corner of the page.



3.2 This takes you to your **My Contacts** list. Click **Add Contact**.



- 3.3a Search for PG&E by entering “**Pacific Gas and Electric**” in the **Name** field or by entering “**benchmarking@pge.com**” in the **Email** field. Click **Search**.

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Welcome EEFG_MITJ_ENERGY: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | Sharing | Planning | Reporting | Recognition

Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account. If you find the person, send a Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact you would like to add does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:

Username:

Email:

[Cancel](#)

Connecting with Other Users

If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily [share your property](#) information with your contacts.

Keeping Personal Contacts

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

- 3.3b When the page refreshes, **Pacific Gas and Electric Company** will appear on the right-hand side of the page. Click “**Connect**”.

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PortfolioManager®

Welcome EEFG_MITJ_ENERGY: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | Sharing | Planning | Reporting | Recognition

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Username:

Email Address:

Pacific Gas and Electric Company
Benchmarking with Pacific Gas and Electric Company

Page 1 of 1 | 1 - 1 of 1

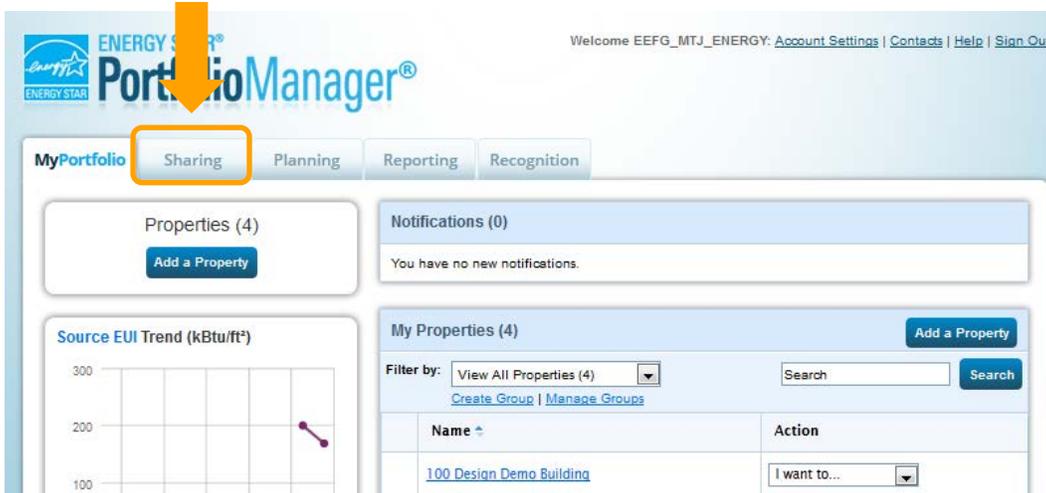
- 3.4 Enter the name and email address of the individual authorizing the connection with PG&E. Next, read and agree to PG&E's Terms of Use. Click **Send Connection Request**.

The screenshot shows the 'Send a Connection Request' form in the ENERGY STAR Portfolio Manager interface. The form is titled 'Send a Connection Request to Pacific Gas and Electric Company to Begin Exchanging Data'. It includes a header with the ENERGY STAR logo and 'PortfolioManager' branding, and a navigation bar with links for 'Account Settings', 'Contacts', 'Help', and 'Sign Out'. The main content area contains a form with two input fields: 'Authorized By:' with the value 'Mark Jewell' and 'Customer Email:' with the value 'benchmarking@eefg.com'. Below these fields is a 'Terms of Use' section with a checkbox for 'I agree to my provider's (Pacific Gas and Electric Company) Terms of Use.' which is checked. A large orange arrow points to a 'Send Connection Request' button, with a 'Cancel' link next to it.

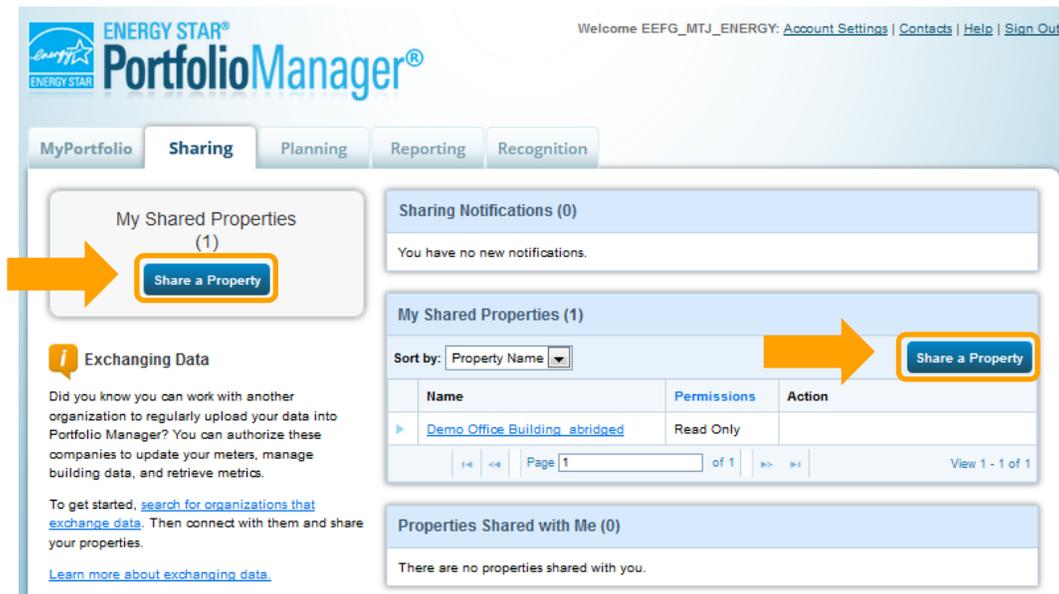
- 3.5 The top of the next page will show a green bar, confirming your connection request was sent to PG&E. **Note:** You are not yet connected to PG&E. PG&E must first accept your request. You will receive an email notification when PG&E accepts your request. The email will state, "Thank you for signing up for PG&E's ENERGY STAR Portfolio Manager Data Exchange Service. You have successfully connected your customer account to PG&E. Please return to Portfolio Manager and share your properties and meters so that PG&E can exchange data with you." The connection and notification typically takes less than 24 hours.

The screenshot shows the 'Search Results' page in the ENERGY STAR Portfolio Manager interface. The page has a header with the ENERGY STAR logo and 'PortfolioManager' branding, and a navigation bar with links for 'Account Settings', 'Contacts', 'Help', and 'Sign Out'. Below the navigation bar are tabs for 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. A green notification bar at the top states: 'You have successfully sent a connection request to Pacific Gas and Electric Company. When Pacific Gas and Electric Company has accepted your request, you will be able to share properties and, therefore, authorize this provider to begin exchanging data with your property(ies)'. Below the notification bar is a 'Search Results' section with a sub-header 'Your Search Criteria' and two input fields for 'Name:' and 'Username:'.

- 3.6 After you have received notification that PG&E has accepted your connection request, the next step is to share your property(ies) with PG&E's Portfolio Manager account. Click the **Sharing** tab.



- 3.7 Click **Share a Property** in either location on this screen.



- 3.8 First, **Select Properties to Share**. Depending on your selection, a drop-down window or button will appear to choose the specific buildings you would like to share with PG&E. Next, choose PG&E as the **Account** with which you would like to share. Click **Continue**.

Welcome EEFG_MTJ_ENERGY: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | Sharing | Planning | Reporting | Recognition

Share Your Property(ies)

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them.

1 **Select Properties to Share**
We'll get into the details of the level of access later. For now, which properties do you want to share?

- Select Number of Property(ies) -
- Select Number of Properties(ies) -
One Property
Multiple Properties
All Properties

2 **Share With**
Which people (accounts) do you want to share these properties with? 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:

Company, Pacific Gas and Electr
Jewell, ShareDemo

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your **connected contacts** appear in this list.

Continue [Cancel](#)

Sharing with Accounts
In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

Exchanging Data
To get started, first connect with an [organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left.

Your Name & Email
After someone accepts your sharing request, they will be able to see your name and email address

- 3.9a Select the **Exchange Data** radio button as the permission level to grant PG&E.

Welcome EEFG_MTJ_ENERGY: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | **Sharing** | Planning | Reporting | Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

3 **Select Permissions for Each Contact**
The access levels you select do not have to be the same for each property or each person.

Sort by:

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Demo Office Building_ abridged (3636980)					
Company, Pacific Gas and Electric	<input type="radio"/>				<input checked="" type="radio"/>

Share Property(ies) [Cancel](#)

- 3.9b When the **Exchange Data** radio button is clicked, a pop-up window will appear. First, enter the name of the **Property Owner**. Next, for the meter(s) you would like to connect with PG&E's Web Services, click the **Full Access** radio button(s). You will not receive data from PG&E unless **Full Access** has been selected.

In the **ID Type** field, input an **S** if you will be providing the **Service Agreement ID Number** or an **M** if you will be providing the **Meter Number**. In this example, Service Agreement ID Numbers are used. In the **Meter #** field(s), provide the **Service Agreement ID Number**. (If you had entered "M" in the **ID Type** field, you would enter the **Meter Number** in the **Meter #** field.)

NOTE: All meter data for a property must be requested through this step. PG&E does not provide aggregated data for properties, only individual meter data.

property(ies). If you have any questions about how to complete this information, please contact [Company, Pacific Gas and Electric](#).

Property Owner: * Example: Jane Smith
Property Owner Name; between 1 and 50 Characters [More Information](#)

Please select the permission level you would like to grant [Company, Pacific Gas and Electric](#) for [Demo Office Building_abbrev](#) for each category:

Item	None	Read Only Access	Full Access	* ID Type ¹	* Meter # ²
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>		
▼ All Meter Information	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="S"/>	<input type="text" value="999999999"/>
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="S"/>	<input type="text" value="999999990"/>

3.9c Scroll down and click **Apply Selections & Authorize Connection**.

▼ All Meter Information	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="S"/>	<input type="text" value="999999999"/>
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="S"/>	<input type="text" value="999999990"/>
Goals, Improvements, & Checklists	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Recognition	<input checked="" type="radio"/>	<input type="radio"/>			

1 ID Type: Example: S; Enter only: "M" for Meter # or "S" for Service Agreement ID; Between 1 and 1 Characters [More Information](#)
2 Meter #: Example: 1234567890; Enter either Service Agreement ID or Meter # from your billing statement; Between 1 and 10 Characters [More Information](#)

Apply Selections & Authorize Connection [Cancel](#)

3.9d When the pop-up window has closed, be sure to click **Share Property(ies)** to complete the data exchange request.

Welcome EEFG_MTJ_ENERGY: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio **Sharing** Planning Reporting Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact

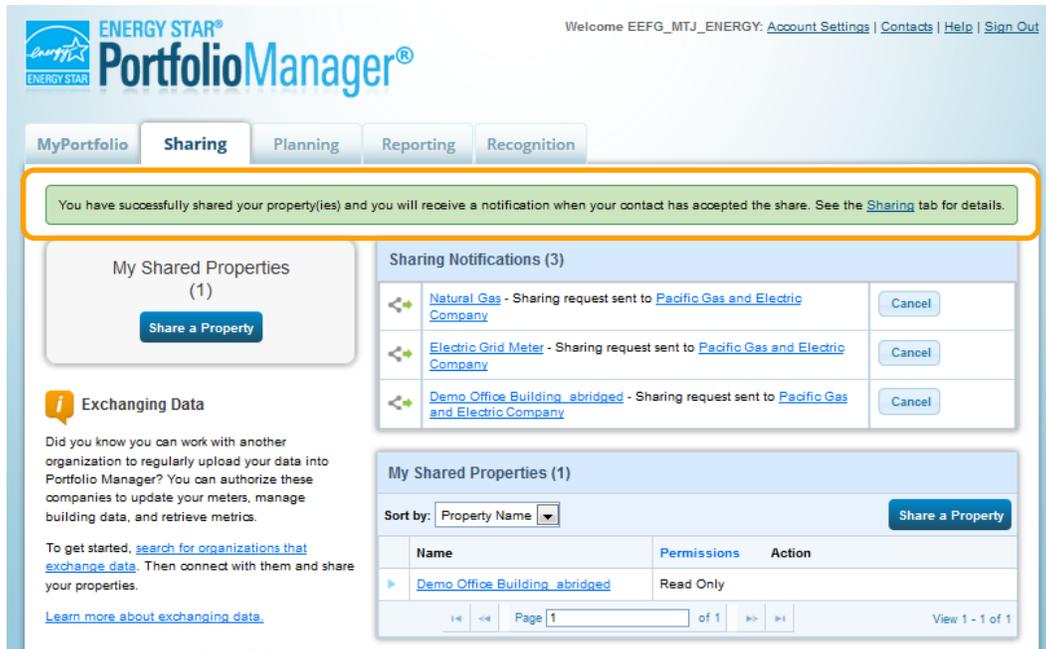
The access levels you select do not have to be the same for each property or each person.

Sort by:

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Demo Office Building_abridged (3636980)					
Company, Pacific Gas and Electric	<input type="radio"/>				<input checked="" type="radio"/> Edit

Share Property(ies) [Cancel](#)

- 3.10 A green bar will appear at the top of the **Sharing** tab confirming the request was submitted. Your request should be processed within 1-2 business days after the customer authorization to release meter data (Step 3.11) has been received. Each shared meter will receive up to three years of meter history and will be updated once per month going forward. You can check on the status of your Exchange Data request by clicking on the **triangle** next to the **Property Name** in the **My Shared Properties** section.



- 3.11 Meter data will not be uploaded to Portfolio Manager until the Service Agreement ID has been authorized for release by the customer of record. See Section 4 for more information on completing this step.

Past Meter Energy Data

For meters that have been successfully shared, PG&E will populate up to three years of energy data for that meter, with the following exceptions:

- The meter has existed less than three years (e.g., a meter in a new building).
- The customer of record for the meter billing data has changed. In that case, only data for the current customer of record will be provided. The "customer of record" is determined by the actual customer, not the Account ID, Service ID number or Meter Number.
- If there are existing meter entries that were entered manually, PG&E's Web Services will not overwrite them; instead, entries will only be populated going forward from the last manual entry.

Monthly Updates

For meters that have been successfully validated, PG&E will update the meter with new entries as new billing data becomes available, with the following exceptions:

- If the meter becomes inactive, PG&E will automatically mark it as inactive in Portfolio Manager. If it is re-activated under the same customer it will start updating again.
- If the customer of record for the meter changes, PG&E will stop updating the meter. To continue receiving new meter entries, you will need to reshare the meter with the most current Service ID or Meter Number. See Section 5 for instructions on reauthorizing meters.

SECTION 4 | Customer Authorization

The next step is to have the customer of record for each meter shared with PG&E in Portfolio Manager authorize release of meter data to the Property Owner. Customers will need to complete the "Portfolio Manager Web Services Data Authorization" form, designating their building owner as the third-party authorized to receive their meter data. PG&E cannot provide aggregated data for each building, all meter data must be authorized for release by the customer of record.

NOTE: Since this process involves releasing data to Portfolio Manager and Environmental Protection Agency (EPA), all meters must be authorized for release even if the building owner is the customer of record for the meter.

This process can only be completed after the Property in Portfolio Manager has been shared with PG&E. Data will not be uploaded to Portfolio Manager until this step is complete.

To authorize release of the data, each customer of record must submit the "Portfolio Manager Web Services Data Authorization" form to PG&E. **The customer should have their monthly bill available to simplify this process.**

- The building owner will receive a confirmation email from PG&E that the property has been shared, which will include a reminder that all meters must have a customer authorization on file before data can be released. Links to the form and www.pge.com/benchmarking will be included.
- After the property has been shared with PG&E, the building owner will ask the customer to complete the authorization process. It is critical that the building owner waits until after the property has been shared with PG&E as the PG&E IT process uses the building information from Portfolio Manager to pre-load information in the online form for each customer.
- Customers will access www.pge.com/benchmarking to complete the "Portfolio Manager Web Services Data Authorization" form. There will be a link to the online form (December 2013) as well as a link to the PDF form.
- For the online form, the customer will need to enter the account number and either the phone number or meter number to access the form. The form will be pre-populated with the SA ID's tied to the account. The customer will need to denote if data is being authorized or revoked for release, select the SA ID's to be released, and designate an Authorized Third Party ("Property Owner" entered in step 3.9). The customer can search for the Property Owner by searching on their building's address. The customer may designate up to ten Authorized Third Parties. If the customer has multiple accounts, the form will need to be submitted for each account.
- For the paper form, the customer must denote if data is being authorized or revoked for release, enter the "Property Owner" (entered in step 3.9) on the "Name of Property Owner or Landlord" line of the form as well as the "Property Address" as the "Property Address, City" on the form, the account numbers, and the "Service Agreement IDs", which can be found on the customer's bill. The customer must sign the form and email to benchmarking@pge.com. I assume we will include a mailing address as well.
- The IT process will check for authorizations for 30 days. If the authorization is not confirmed within this time, an email will be sent to building owners reporting that meters have not been authorized for release. The building owner will have the responsibility for reconciling this with their tenant.

 ENERGY STATEMENT www.pge.com/MyEnergy	 Account No: 1234567890-1												
	Statement Date: 08/28/2013 Due Date: 09/16/2013												
Service For: Please see details page.	Your Account Summary												
Questions about your bill? 24 hours, 7 days/wk 1-800-468-4743 Business Specialist available: M-F 7am-7:30pm, Sat 7am-4:30pm www.pge.com/MyEnergy	<table> <tr> <td>Amount Due on Previous Statement</td> <td style="text-align: right;">\$227.82</td> </tr> <tr> <td>Payment(s) Received Since Last Statement</td> <td style="text-align: right;">-227.82</td> </tr> <tr> <td>Previous Unpaid Balance</td> <td style="text-align: right;">\$0.00</td> </tr> <tr> <td>Current Electric Charges</td> <td style="text-align: right;">\$184.58</td> </tr> <tr> <td>Current Gas Charges</td> <td style="text-align: right;">7.84</td> </tr> <tr> <td>Total Amount Due by 09/16/2013</td> <td style="text-align: right;">\$192.42</td> </tr> </table>	Amount Due on Previous Statement	\$227.82	Payment(s) Received Since Last Statement	-227.82	Previous Unpaid Balance	\$0.00	Current Electric Charges	\$184.58	Current Gas Charges	7.84	Total Amount Due by 09/16/2013	\$192.42
Amount Due on Previous Statement	\$227.82												
Payment(s) Received Since Last Statement	-227.82												
Previous Unpaid Balance	\$0.00												
Current Electric Charges	\$184.58												
Current Gas Charges	7.84												
Total Amount Due by 09/16/2013	\$192.42												



ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 1234567890-1
Statement Date: 08/28/2013
Due Date: 09/16/2013

Summary of your energy related services

	Meter Number	Usage	Amount
Service For: 123 Main Street			
Service Agreement ID: 5202490327			
Gas Charges	61083850	0.000000 Therms	\$7.84
Total			\$7.84
Service For: 123 Main Street			
Service Agreement ID: 5202490625			
Electric Charges	1005719171	773.720000 kWh	\$184.58
Total			\$184.58

SECTION 5 | Troubleshooting Web Services Errors

If you have shared meters with PG&E for Web Services, you should receive an email within 1-2 business days indicating the success of your request and advising you of any error messages. Please follow the steps below for resolution of each error message:

Invalid Service ID or Meter Number

The Service ID or Meter Number you entered is either incorrect or is not the most current one. If the meter is deemed to be inactive, this refers to the last Service ID number that was active for the meter. Common causes of this error include:

- Data entry error when typing in the Service ID number or Meter Number.
- Entering the Account ID instead of the Service ID number or Meter Number. To see where the Service ID and Meter Numbers are on your bill, refer to the Frequently Asked Questions section at the end of this document.
- The Service ID number is not active, or in the case of an inactive meter, is not the Service ID number that was most recently active. Make sure you have entered the current Service ID number for the meter.

After verifying the correct Service ID or Meter Number, reshare the meter, making sure that the number you typed is correct. See Section 5.3 for instructions on reauthorizing meters.

City Name Does Not Match ID Number

The city name of the property address does not match the city name on file for the meter identified. Most often, this error is the result of a typo or using an abbreviation for the city name (e.g., entering “S.F.” instead of “San Francisco”).

To correct this error, on the **Details** tab of the property profile, click **Edit** in the **Basic Information** box. Correct the spelling of the city name, scroll down and click **Update Property**. After making this correction, reshare the meter. See Section 5.3 for instructions on reauthorizing meters.

Meter Already Shared in Same Building

This error is the result of attempting to share multiple meters with the same Service ID number. After verifying the correct Service ID number, reshare the meter, making sure that the number you typed is correct. See Section 5.3 for instructions on resharing meters.

If you created a duplicate meter by mistake, you can delete the duplicate from the **Meters** tab in your property profile. Next to the name of the duplicate meter, select **Delete Meter** from the **Action** drop-down menu. Click **Continue** on the pop-up window to confirm the meter’s deletion.

Duplicate Meter ID

This error is the result of attempting to share multiple meters with the same Meter Number. After verifying the correct Meter Number, reshare the meter, making sure that the number you typed is correct. See Section 5.3 for instructions on resharing meters.

If you created a duplicate meter by mistake, you can delete it from the **Meters** tab in your property profile. Next to the name of the duplicate meter, select **Delete Meter** from the **Action** drop-down menu. Click **Continue** on the pop-up window to confirm you want to delete that meter.

Read Only

This error is the result of providing PG&E with **Read Only Access** for your meter instead of **Full Access**. See Section 5 on resharing meters.

System Error

If you receive an email stating a system error is preventing PG&E from uploading your energy data, contact us at benchmarking@pge.com for assistance.

SECTION 6 | Changing Web Services Authorizations: Share Additional Properties and Meters, Reshare Meters, or Change Permissions

Sharing Additional Properties and Meters with PG&E's Web Services

- 6.1 Once you are connected with PG&E (see Sections 3.1 - 3.5), you can share additional properties with PG&E and share Web Services for their meters in a few easy steps. On the **My Portfolio** tab, under the **Action** column, select **Share with Others** next to the appropriate property name.

The screenshot displays the Energy Star Portfolio Manager interface. At the top, there is a navigation bar with tabs for 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. Below this, there are several sections: 'Properties (4)' with an 'Add a Property' button, 'Source EUI Trend (kBtu/ft²)' with a line graph showing data from 2002 to 2012, and 'Total GHG Emissions Trend (MTCO2e)' with another line graph. The main section is 'My Properties (4)', which includes a filter dropdown set to 'View All Properties (4)', a search bar, and a table of properties. The table has columns for 'Name' and 'Action'. The 'Action' column for the '100 Design Demo Building' row is highlighted with a yellow box, and the 'Share with Others' option is selected in the dropdown menu. An orange arrow points from the 'Share with Others' option to the '100 Design Demo Building' row. Above the table, there is a 'Notifications (3)' section with three entries, each with a 'Cancel' button. The top right corner of the interface shows the user's name 'Welcome EEFG_MTJ_ENERGY:' and links for 'Account Settings', 'Contacts', 'Help', and 'Sign Out'.

- 6.2 Next, follow instructions in Sections 3.8 – 3.10 to connect the property's meters with PG&E's Web Services.

Resharing Meters

- 6.3a If the customer of record has changed for your meter, or you received an email with an error message for a meter you previously tried to grant PG&E access to, you may need to reshare the meter.

From the property profile **Summary** tab, under the **Action** drop-down menu for PG&E, select **Edit Settings for Exchanging Data**.

Welcome EEFG_MTJ_ENERGY: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

ENERGY STAR® Portfolio Manager®

MyPortfolio | Sharing | Planning | Reporting | Recognition

Demo Office Building_abridged
 100 Demo Drive, San Francisco, CA 94105 | [Map It](#)
 Portfolio Manager Property ID: 3636980 | Primarily: Office
 Year Built: 2010

Weather-Normalized Source EUI (kBtu/ft²)
 Current EUI: [N/A](#)
 Baseline EUI: [N/A](#)

Summary | Details | Meters | Goals | Design

Property Profile
 You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about your property, including a photo.
[Create Profile](#)

Source EUI Trend (kBtu/ft²)
 2002 2004 2006 2008 2010 2012

Notifications
 Demo Office Building_abridged - Share accepted by Pacific Gas and Electric Company [Clear](#)

Sharing this Property
 Shared with: 3 [Contacts](#) [Share](#)

Name	Permissions	Action
Popp, Shannon	Full Access	I want to...
Company, Pacific Gas and Electric	Exchange Data	I want to... I want to... Edit Settings for Exchanging Data Stop Exchanging Data
Jewell, ShareDemo		

[Edit Multiple Permissions](#)

6.3b Click on the **Edit** link in the **Exchange Data** column.

Welcome EEFG_MTJ_ENERGY: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

ENERGY STAR® Portfolio Manager®

MyPortfolio | **Sharing** | Planning | Reporting | Recognition

Edit Sharing Permissions
 The table below lists your property (ies) and the type of access you have granted to each person. You may make any necessary edits and click "Edit Permissions".

Sort by: [Property Name](#)

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Demo Office Building_abridged (3636980)					
Company, Pacific Gas and Electric	<input type="radio"/>				<input checked="" type="radio"/> Edit

[Edit Permissions](#) [Cancel](#)

6.3c Follow instructions in Sections 3.9b – 3.10 to finalize the reauthorization with the new or correct Service ID/Meter Number(s).

Changing Permissions for Specific Properties and/or Meters

6.4 From the property profile **Summary** tab, under the **Action** drop-down menu for PG&E, you have two options: **Stop Exchanging Data** or **Edit Settings for Exchanging data**.

6.4a To stop sharing your property and all of its associate meters with PG&E, select **Stop Sharing Data**.

The screenshot shows the Energy Star Portfolio Manager interface for a property named "Demo Office Building_abridged". The "Summary" tab is selected. In the "Sharing this Property" section, a table lists the property is shared with "1 Contact". The contact is "Company, Pacific Gas and Electric" with "Exchange Data" permissions. A dropdown menu is open for this contact, showing options: "I want to...", "I want to...", "Edit Settings for Exchanging Data", and "Stop Exchanging Data". An orange arrow points to the "Stop Exchanging Data" option.

6.4b A pop-up window will appear to confirm that you want to remove PG&E's access. Click **Continue**.

The screenshot shows the same Energy Star Portfolio Manager interface, but with a confirmation pop-up window. The window text reads: "If you remove access then Company, Pacific Gas and Electric will no longer be able to exchange data with Demo Office Building. In order to resume exchanging data, you will have to re-share Demo Office Building with Company, Pacific Gas and Electric. Are you sure you want to stop exchanging data with Company, Pacific Gas and Electric?". The "Continue" button is highlighted with an orange arrow.

6.5a To share additional meters with PG&E or remove PG&E's access to individual meters, select **Edit Settings for Exchanging Data**.

The screenshot shows the Energy Star Portfolio Manager interface for a property named "Demo Office Building_abridged". The "Sharing" tab is active. A table lists sharing permissions for three contacts: Popp, Shannon (Full Access), Company, Pacific Gas and Electric (Exchange Data), and Jewell, ShareDemo (Exchange Data). An orange box highlights the "Exchange Data" row for "Company, Pacific Gas and Electric", with a dropdown menu open showing options: "I want to...", "I want to...", "Edit Settings for Exchanging Data", and "Stop Exchanging Data". An orange arrow points from the "Exchange Data" text in the table to the dropdown menu.

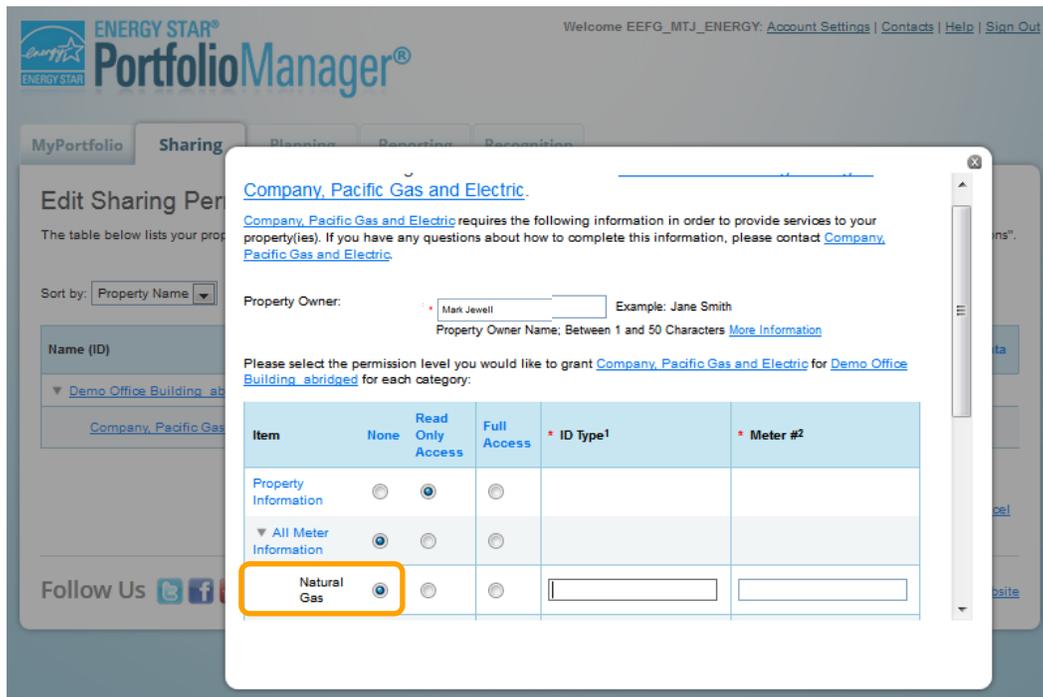
6.5b Click on the **Exchange Data** radio button.

The screenshot shows the "Edit Sharing Permissions" screen in Energy Star Portfolio Manager. A table lists sharing permissions for the property "Demo Office Building_abridged (3636980)". The table has columns for Name (ID), None, Read Only Access, Full Access, Custom Access, and Exchange Data. The "Exchange Data" column for "Company, Pacific Gas and Electric" has a radio button selected, which is highlighted with an orange box.

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Demo Office Building_abridged (3636980)					
Company, Pacific Gas and Electric	<input type="radio"/>				<input checked="" type="radio"/> Edit

Buttons: Edit Permissions, Cancel

- 6.5c A pop-up window with the Data Exchange Access Permissions will open. For meters for which you would like to **remove** PG&E’s access, select the **None** radio button and continue with Sections 3.9c – 3.9d. For new meters you would like to **share**, follow the steps outlined in Sections 3.9b – 3.10.



Notes:

- If **Exchange Data: Pending** is displayed under the sharing **Permissions** for PG&E, your previous request has not yet been processed. If it has been more than 2 business days, contact PG&E via email.
- If you receive an error message when trying to share a property, it may mean that you are not the “Property Owner” (i.e., the individual who set up the property profile). If the property has been shared with you, you are not permitted to share it with other accounts or PG&E’s Web Services. You can determine who the “Property Owner” is by going to the **Sharing** tab and scrolling down to **Properties Shared with Me**. Information on who shared the property with you is provided in that table.

- 6.6 **For newly shared or reshared properties and meters:** When your request to exchange data is processed, you will receive an email indicating for each meter whether it was successfully validated or produced an error. You should receive this email within 1-2 business days.

For meters that have been successfully validated, PG&E will populate up to three years of energy data for that meter, with the following exceptions:

- The meter has existed less than three years (e.g., a new building).
- The customer of record for the meter billing data has changed. In that case, only data for the current customer of record will be provided. The “customer of record” is determined by the actual customer, not the Account ID, Service ID or Meter Number.
- If there are existing meter entries that were entered manually, PG&E’s Web Services will not overwrite them; instead, entries will only be populated going forward from the last manual entry.
- “Date Meter became Active” field is incorrect. This is a new field in Portfolio Manager. We have found that some meters previously shared using the now-obsolete ABS system are incorrectly entered, preventing the full three years of history from populating. Under the **Meters** tab, select **Edit Basic Meter Information** under the **Action** drop-down menu. Make sure the **Date Meter became Active** field is set to a date more than three years ago.

For meters that have been successfully validated, PG&E will update the meter with new entries as new billing data becomes available, with the following exceptions:

- If the meter becomes inactive, PG&E will automatically mark it as inactive in Portfolio Manager. If it is reactivated under the same customer it will start updating again.
- If the customer of record for the meter changes, PG&E will stop updating the meter. To continue receiving new meter entries, you will need to reshare that meter with PG&E. See Section 5.3 on instructions for reauthorizing meters.

If, after 2 business days, you have not received an email and your meter data has not been populated, please send an email to PG&E and include your Portfolio Manager username and a list of the specific properties and meters that require attention. If you receive an email with error messages, refer to Section 4 for troubleshooting instructions.

For unshared properties and meters: If you have unshared your property with PG&E, that means that PG&E will no longer update any meters for that property, but any existing meter entries will not be removed from Portfolio Manager.

SECTION 7 | Frequently Asked Questions (FAQs)

Where can I find the Account Number, Service Agreement ID and Meter ID for my meters?

For Property Owners: The Meter ID is likely more accessible for you. Use the Meter Number located on the physical Meter at the property to configure Web Services.

For Customers of Record for each Meter: All of this information can be found on the customer of record's monthly bill. Each meter has a Service Agreement ID (SA ID) number and a Meter Number. Either number can be used to configure Web Services. You can find the Account Number at the top of each page of your bill. You can find the Meter Numbers for each meter in the "SUMMARY OF YOUR ENERGY RELATED SERVICES" (shown below) or the "GAS SERVICE CHARGES" and "ELECTRIC SERVICE CHARGES" portions of your bill. Please review your bill closely as you may have multiple Account Numbers, Meter Number's, and Service Agreement ID's. You can also use PG&E's online tool, MyEnergy, to identify your Account Number(s), Service Agreement ID number(s), and Meter Number(s).

ENERGY STATEMENT
www.pge.com/MyEnergy

Account No: 1234567890-1
Statement Date: 08/28/2013
Due Date: 09/16/2013

Service For:
Please see details page.

Your Account Summary

Amount Due on Previous Statement	\$227.82
Payment(s) Received Since Last Statement	-227.82
Previous Unpaid Balance	\$0.00
Current Electric Charges	\$184.58
Current Gas Charges	7.84
Total Amount Due by 09/16/2013	\$192.42

Questions about your bill?
24 hours, 7 days/wk 1-800-468-4743
Business Specialist available:
M-F 7am-7:30pm, Sat 7am-4:30pm
www.pge.com/MyEnergy

ENERGY STATEMENT
www.pge.com/MyEnergy

Account No: 1234567890-1
Statement Date: 08/28/2013
Due Date: 09/16/2013

Summary of your energy related services

Service For:	Meter Number	Usage	Amount
123 Main Street Service Agreement ID: 5202490327 Gas Charges	61083650	0.000000 Therms	\$7.84
Total			\$7.84
123 Main Street Service Agreement ID: 5202490625 Electric Charges	1005719171	773.720000 kWh	\$184.58
Total			\$184.58

How long will it take for my Portfolio Manager account to receive meter data after I sign up for Web Services?

New meter authorizations should be processed within 1-2 business days. If it has been more than 2 business days and you are still not receiving data, please refer to the Troubleshooting information in Section 4 of this document.

New meter entries are uploaded to Portfolio Manager once per month. There may be a lag time between receiving your monthly PG&E bill and seeing the new data in Portfolio Manager. If it has been more than one month and your meter data has stopped updating, please contact PG&E.

What if my building has meters that belong to other customers, such as separately metered tenants in a multi-tenant office building?

To benchmark, you will need to obtain energy use data for all of the meters in your building(s). To configure Web Services, use the Meter Number located on each physical meter at your property. To receive data for each meter, you will need to authorize PG&E to release your own data to Portfolio Manager. You also need to have each tenant, or PG&E customer of record, complete the Portfolio Manager Web Services Data Authorization form to release the data to the Property Owner for each meter. This form is available online (as of December 2013) or as a PDF, both versions can be found on the PG&E Benchmarking Web site (www.pge.com/benchmarking). The customer of record may submit the online form directly online. The paper form must be completed and signed by the customer then emailed to benchmarking@pge.com. There is no confirmation of receipt of the Portfolio Manager Web Services Data Authorization form.

NOTE: The Portfolio Manager account must be created and shared with PG&E before the customer authorization process is completed.

Why did I receive less than one year of meter data when I signed up for Web Services?

For meters that have been successfully connected, PG&E will populate up to three years of energy data for that meter, with the following exceptions:

- Meter has existed less than one year: If the meter has existed for less than one year, and you are receiving an error that the meter has less than one full year of energy data, you need to correct the **Date the Meter became Active** field. On the **Meters** tab, select **Edit Basic Meter Information** under the **Action** menu. Update the **Date the Meter became Active** field to the correct date. This will disable the “full year of data” verification.
- Change in Customer of Record: In order to protect customer privacy, PG&E will not send meter entries that were billed under a previous Customer of Record.
- Existing meter entries: If you have manually input entries for the meter before authorizing Web Services, PG&E will only populate additional entries following the most recent one that you entered. For example, if your last entry was for September 1 through October 1, PG&E will only provide data starting after October 1. This prevents the creation of duplicate meter entries and ensures that you do not accidentally lose any of your previous work.
- “Date Meter became Active” field is incorrect. This is a new field in Portfolio Manager. Some meters shared previously under the now-obsolete ABS system are incorrectly populated, preventing the full three years of history from populating. Under the **Meters** tab, select **Edit Basic Meter Information** under the **Action** drop-down menu. Make sure the **Date Meter became Active** field is set to a date more than three years ago.

Why have my meters stopped updating?

For meters that have been successfully validated, PG&E will update the meter with new entries as new billing data becomes available, with the following exceptions:

- The meter becomes inactive. If it is reactivated under the same customer, it will start updating again.
- The customer of record for the meter changes. To continue receiving new meter entries, you will need to reshare the meter with the most current Service ID number or Meter Number. While the Meter Number has not changed, Web Services will not update the meter until the Meter Number is re-entered and **Exchange Data** is requested.

There may be a short lag time between receiving your monthly PG&E bill and seeing the new data in Portfolio Manager. If, after one month, your meter data has stopped updating and you do not believe the above reasons apply, please contact PG&E.

Why am I getting an “overlapping meter entries” error message?

Portfolio Manager requires that meter entries do not overlap by more than one day. You may be getting this error for one of the following reasons:

- Before signing up for Web Services, you had previously entered meter data manually and the start and end dates did not accurately match the meter read cycle. For example, if you entered 1/1/12–1/31/12 when the actual meter reading was for 12/25/11–1/24/12, you will want to correct this by editing the meter entry start and end dates.
- The meter had a bill that was rebilled either due to an error or an estimated bill. Web Services will update the meter with the new bill, but the previous bill will not be removed. To correct this, delete the original bill entry that was corrected. If you are not sure which entry to delete, contact PG&E.

Why doesn't my building have an ENERGY STAR[®] score?

To find out why your facility does not have a score, click on the link that says “N/A” in the box titled **Weather-Normalized Source EUI (kBtu/ft²)**. For a more detailed explanation, refer to the Portfolio Manager Help Web page.



If the customer of record changes for a meter associated with my property, how do I continue to get data uploads for that meter?

If the customer of record changes for a meter (ie. a tenant moves out of a location, and a new tenant moves in), PG&E will stop uploading the usage information for the meter, due to data privacy concerns. In order to continue data upload for this meter, the Portfolio Manager customer must reshare the meter with the new Service ID assigned to the new customer of record. Please see section 5.3a of the Benchmarking Guide for instructions on how to reshare the meter(s).

What building types are eligible to receive an ENERGY STAR score and what is required to earn the ENERGY STAR label?

There are more than 15 “ratable” space types eligible to receive an ENERGY STAR score of 1-100. A ratable building that receives a score of 75 or higher may be eligible to receive an ENERGY STAR label provided that certain other criteria are met.

There are more than 50 additional space types for which EPA provides weather-normalized national average energy use intensity (EUI) for comparison purposes.

Space types that do not qualify for either a 1-100 rating or a weather-normalized national average EUI can still use Portfolio Manager to calculate a weather-normalized EUI. This metric allows a property to measure and track its own energy performance over time.

How do I handle net energy meters and on-site generation in Portfolio Manager?

All energy used by a building must be entered in Portfolio Manager, including on-site generation. If your on-site generation (e.g., solar, wind, etc.) is grid-connected, then it will have a “net energy meter” and be billed for the net amount (energy consumed less energy generated). For example:

- If the building uses 1000 kWh and generates 400 kWh, the net amount billed will be 600 kWh.

The meter data entered in Portfolio Manager via Web Services will reflect only this net amount. The meter does not record the output of the on-site system. Portfolio Manager requires that net energy meters be entered as two separate meters:

- **One meter for On-Site Generation:** This is the amount generated by the on-site system. PG&E does not have this data; you will need to collect it from the monitoring system or inverter readings and enter the data manually. In the above example, the amount entered for this meter should be 400 kWh.
- **One meter for Grid Purchase:** This is the amount of electricity consumed by the building in addition to the on-site generation. This is the amount purchased from PG&E and can be found on your monthly billing statement. Web Services can be used for this meter so that the usage is automatically uploaded on a monthly basis.

Because Portfolio Manager calculates scores using source energy, renewable energy generated at the building will result in a higher ENERGY STAR score than the same quantity (kWh) of energy purchased through the grid. More information on On-Site Renewable Energy is available in the Portfolio Manager Online Help.

Why is Pacific Gas and Electric Company not showing up when I search under Add Contacts?

If Pacific Gas and Electric Company does not appear in your search, it may be because you have previously connected with PG&E. To verify whether you are connected, go to "Contacts." Because of the naming convention within Portfolio Manager, PG&E is filed as "**Company, Pacific Gas and Electric**" and will appear under the "C" listings.

If PG&E (Company, Pacific Gas and Electric) is not listed under your contacts, make sure you are searching for "Pacific Gas and Electric". Searching for "PG&E" does not work.

I completed and submitted the Portfolio Manager Web Services Data Authorization form, but nothing has happened. When will the information show up in Portfolio Manager?

The Portfolio Manager Web Services Data Authorization form should be used to get permission from customers to use their meter for Web Services if you are a third party. You will still need to register a Portfolio Manager account, create a facility profile, add meters and enroll the meter(s) in Web Services as described in Sections 1-3. After the meters have been shared with PG&E, have your tenants, or PG&E customers of record, complete the Portfolio Manager Web Services Data Authorization form. There is no confirmation of receipt for this form.

How can I improve my ENERGY STAR® score?

PG&E wants to help you improve your score! To find out more about our many programs that can help you save energy and money, check out PG&E's My Business Web page, or call our Business Customer Service Center at 1-800-468-4743. Energy audits and cash incentives for new equipment are just some of the many services we offer.

Where can I get more help?

For questions related to ENERGY STAR Portfolio Manager, log in to your account, then check the **Help** link, located on the top right corner of any screen. Questions can also be emailed to ENERGY STAR. If you have questions or need further help with PG&E's Web Services, please email PG&E at benchmarking@pge.com.

PG&E also regularly offers hands-on benchmarking workshops. To register for upcoming workshops, visit www.pge.com/pec/classes.

Helpful Web Sites

PG&E's Benchmarking Web site: www.pge.com/benchmarking

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

PG&E's My Business Web site: www.pge.com/mybusiness

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