

# How to Benchmark Your Building

Instructions for Using ENERGY STAR®  
Portfolio Manager® and Southern California Gas  
Company's Web Services



This document is a quick-start guide for entering your property into Portfolio Manager® and enrolling in Southern California Gas Company's (SoCalGas®) Web Services. For additional help, we suggest you refer to resources on the SoCalGas Benchmarking webpage, the Portfolio Manager Overview, and Portfolio Manager Online Help website.

## 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.

As of January 1, 2014, non-residential Property Owners are required to benchmark their building's energy performance using Portfolio Manager and disclose results at the point of a whole building real estate transaction, including sale, lease, or refinance. As a result, SoCalGas Customers may be asked to release their energy data to their Property Owners or Landlords to complete the benchmarking process in Portfolio Manager.

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 for many frequently asked questions at the end of the document.

Before getting started, you may want to collect information about your building using the Data Collection Worksheet available on EPA's ENERGY STAR Portfolio Manager Benchmarking Web site.

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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](http://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, links for 'ENERGY EFFICIENT products', 'ENERGY SAVINGS at home', 'ENERGY EFFICIENT new homes', and 'ENERGY STRATEGIES FOR buildings & plants'. There are also links for 'ABOUT ENERGY STAR' and 'PARTNER RESOURCES'. The main content area is titled 'Use Portfolio Manager' and includes a sidebar with links like 'Learn the benefits', 'Get started', and 'Use Portfolio Manager'. The main text describes the benefits of the tool and includes a 'Sign Up' button highlighted with a red circle and a red arrow pointing to it. The 'Sign Up' button is located in a box that also contains a 'Current Portfolio Manager Users' section with fields for 'username' and 'password', and a 'LOG IN' button.

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

The screenshot shows the 'Create an Account' form on the ENERGY STAR Portfolio Manager website. The form is divided into two main sections: 'Create Your Account' and 'About Yourself'. The 'Create Your Account' section includes fields for 'Username:', 'Password:', and 'Confirm Password:'. The 'About Yourself' section includes fields for 'First Name:', 'Last Name:', 'Job Title:', 'Email:', and 'Confirm Email:'. A red border highlights the entire form area. To the right of the form, there is a 'Getting Started' section with instructions on how to use the tool and an 'Accounts for Organizations' section with instructions on how to create an account for an organization. The 'Create My Account' button is located at the bottom of the form.

Phone:
Country:
Language:
Reporting Units:
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?
Will you be using the web services API to develop software to exchange data with Portfolio Manager?

### Searchability in Portfolio Manager

Can other people search for you and send you a connection request?

### 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:

### 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.

Create My Account
Cancel

**Note:** Portfolio Manager's default is to enable others to search for your account to facilitate connecting with others. You won't want to change this **Searchability in Portfolio Manager** default setting if you intend to enroll in SoCalGas' web service.

- 1.3 On the Portfolio Manager log in page ([www.energystar.gov/portfoliomanager](http://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.



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How Portfolio Manager calculates metrics

Interpret your results

Verify and document your savings

Share and request data

## Use Portfolio Manager

You've heard it before: you can't manage what you don't measure. That's why EPA created ENERGY STAR Portfolio Manager®, an online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions. Use it to benchmark the performance of one building or a whole portfolio of buildings, all in a secure online environment.

### Not sure if Portfolio Manager is for you? It is!

You can use Portfolio Manager to manage the energy and water use of any building. Seriously. Any building. K-12 school? Check. Office building? Check. Stadium? Check. We could keep going.

All you need are your energy bills and some basic information about your building to get started.

### Join the rest of the industry.

When you add your buildings, you'll be joining 40 percent of U.S. commercial building space that's already benchmarked in Portfolio Manager — making it the *de facto* industry standard. You'll also be joining 35 percent of the Fortune 500®, half of the largest U.S. healthcare organizations, major league sports teams, colleges and universities, and entire cities.

Discover the new and improved Portfolio Manager today.

SIGN UP

Current Portfolio Manager Users

EEFG\_MTIJ\_ENERGY

••••••••••

Forgot password? LOG IN

## 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.

The screenshot shows the ENERGY STAR Portfolio Manager interface. A red box at the top center contains the text "Two ways to add a property...". Two red arrows point from this box to two "Add a Property" buttons. The first button is located in the "Properties (1)" section on the left. The second button is located in the "My Properties (1)" section on the right. Below the "My Properties (1)" section, there is a table with one row: "Demo Office Building 2" and "I want to...". At the bottom of the page, a red box contains a tip: "If you're a pro, you may want to [upload and/or update multiple properties](#) at once using an Excel spreadsheet. This can be done to create new properties, add use details, create meters and add meter consumption data."

ENERGY STAR® Portfolio Manager®

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MyPortfolio | Sharing | Planning | Reporting | Recognition

Properties (1)

**Add a Property**

Source EUI Trend (kBtu/ft²)

2002 2004 2006 2008 2010 2012

Notifications (0)

You have no new notifications.

My Properties (1)

**Add a Property**

Filter by: View All Properties (1) Search Search

Create Group | Manage Groups

Name	Action
<a href="#">Demo Office Building 2</a>	I want to...

Page 1 of 1 10 View 1 - 1 of 1

Download Entire Portfolio

If you're a pro, you may want to [upload and/or update multiple properties](#) at once using an Excel spreadsheet. This can be done to create new properties, add use details, create meters and add meter consumption data.

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

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## 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 SoCalGas' 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/caferias

Back Continue Cancel

**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 property use by clicking **Edit Name** next to **Office Use**, at the top of the next page 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 <a href="#">Map It</a>
Year Built:	2010		San Francisco, CA 94105

Property consists of: 1 building with parking

[Edit](#)



Add Another Type of Use Add

**Office Use** Edit Name Delete

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 <span>Sq. Ft.</span>	01/01/2010	<input type="checkbox"/>
Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010	<input type="checkbox"/>
Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010	<input type="checkbox"/>
Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010	<input type="checkbox"/>
Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2010	<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 property use 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 just as you did in Section 2.4.

Add Another Type of Use Add

**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 <span>Sq. Ft.</span>	01/01/2010	<input type="checkbox"/>
Weekly Operating Hours	65 <input type="checkbox"/> Use a default	01/01/2010	<input type="checkbox"/>
Number of Computers	905 <input type="checkbox"/> Use a default	01/01/2010	<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 | Primarily: Office  
 Year Built: 2010

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

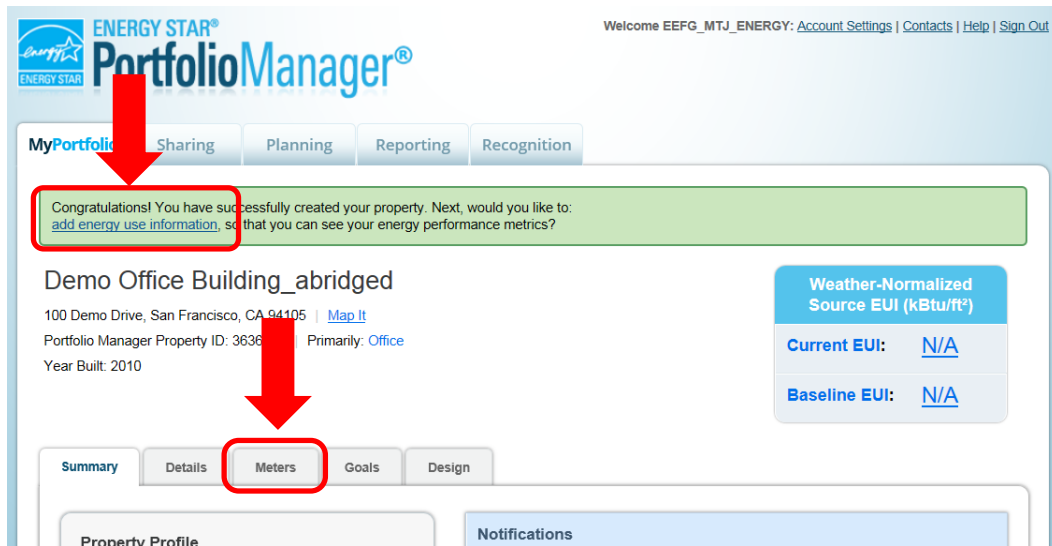
**Summary** Details Meters Goals Design

**Property Profile** **Notifications**

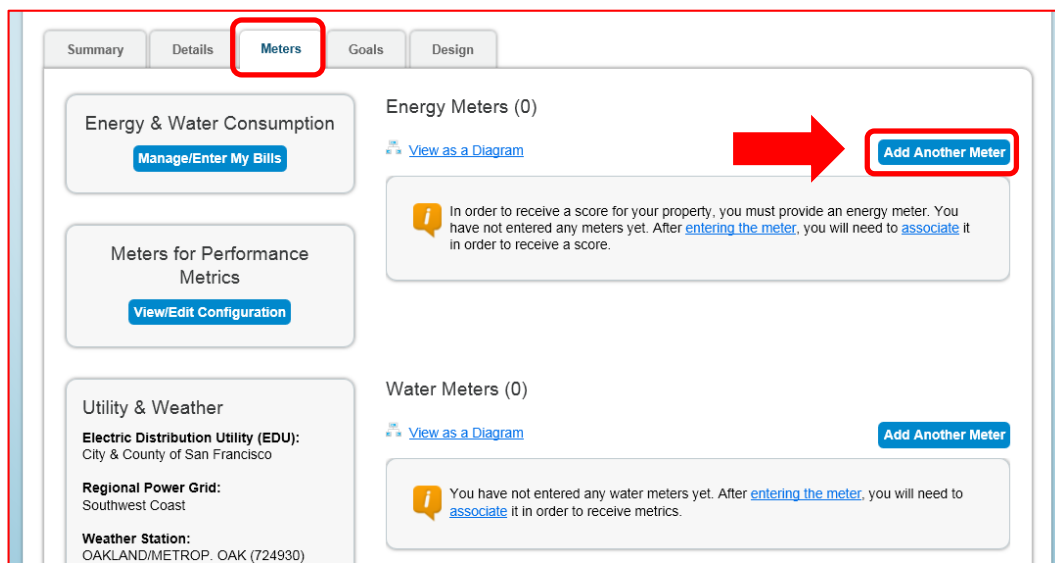
## Setting up Energy Meters

You will need to add an Energy Meter to your property profile for each meter serving the building. For SoCalGas meters that you are signing up for Web Services, add one meter per Account Number/Location ID number. Refer to section 3.11 for help with locating the Meter Number, Account Number, or Location ID on your SoCalGas 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. Either choice will take you to the meters tab.



2.9 Once you are on the meters tab, click **Add Another Meter**.



- 2.10 Indicate the sources of your property's energy. As you select different fuels, additional fields will appear. Indicate how many gas meters you have under your SoCalGas account. 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 site water consumption will not factor into your benchmark score.

The screenshot shows the 'Get Started Setting Up Meters for Demo Office Building\_abridged' page in the ENERGY STAR Portfolio Manager. The page has a header with the ENERGY STAR logo, 'PortfolioManager', and a welcome message for 'BETHGUCCIARDI'. Below the header are tabs for 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. The main content area is titled 'Get Started Setting Up Meters for Demo Office Building\_abridged' and includes a paragraph explaining four ways to enter meter data. The 'Sources of Your Property's Energy' section is highlighted with a red box. It contains a list of energy sources with checkboxes and a 'How Many Meters?' field. The 'Natural Gas' option is selected and highlighted with a red box, with the 'How Many Meters?' field set to '1'. Below this is a section for 'Your Property's Water Usage' with checkboxes for water sources. At the bottom right, there is a red arrow pointing to a 'Get Started!' button, which is also highlighted with a red box. A 'Cancel' link is visible next to the button.

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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
  - How Many Meters?
- ☐ 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.

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#### 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](#).

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#### 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 the meter was first billed for each meter, which is normally the date the building was built. For SoCalGas meters you plan to connect via Web Services, it will be important to rename your meters as follows: name each meter using only the full 8 digit meter number, with no additional text either before or after the meter number. Then click **Continue**.  
**Note:** For SoCalGas meters, the units selected for gas use should be therms.

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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 **Date Meter became Active** are required. You can also change the meter's name.

2 Energy Meters for Demo Office Building\_abridged (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
<input type="checkbox"/>	01234567	Natural Gas		therms	01/01/2010	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	01/01/2010	<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	Date Meter became Active	In Use?	Date Meter became Inactive
--------------------------	------------	------	------------	-------	--------------------------	---------	----------------------------

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

[Back](#) [Continue](#) [Cancel](#)

- 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. Adding cost data is optional. Instead of adding data manually, you can 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 SoCalGas' 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

▼ 01234567 [Edit](#) [Delete Meter](#)

Start Date	End Date	Usage therms	Cost (\$)	Estimation
<a href="#">Click to add an entry</a>				

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

You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#)

[Choose File](#) No file chosen [Upload](#)

► Electric Grid Meter [Edit](#) [Delete Meter](#)

[Back](#) [Finish Meter Set Up](#) [Cancel](#)

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- 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. Note: This important step is also often referred to as "configuring your meters". After you have made your selections, click **Apply Selections**.

The screenshot shows the 'Meters to add to Total Consumption for Metrics' configuration page for 'Demo Office Building\_abridged'. The page has tabs for MyPortfolio, Sharing, Planning, Reporting, and Recognition. A green banner at the top says 'Congratulations! You have successfully added meters to your property.' Below this, the page is titled 'Meters to add to Total Consumption for Metrics for Demo Office Building\_abridged' with a sub-header '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.'

The 'Property Totals' section includes 'Energy Meters' and 'Water Meters'. Under 'Energy Meters', there is a checkbox to 'Check the boxes for the meters that should be included in the energy metrics:'. Below this is a table with two columns: 'Meter Name' and 'Meter ID'. The first row is 'Electric Grid Meter' with ID '01234567'. Both are checked. Below the table, there is a section 'Total of 2 energy meter(s). Tell us what these meter(s) measure:' with two radio buttons: 'These meter(s) account for the total energy consumption for this property.' (selected) and 'These meter(s) do not account for the total energy consumption for this property.'.

The 'Water Meters' section states 'There are currently no water meters entered for this property/building.' and provides a link to 'Enter information about your water meters'.

A red box highlights the 'Electric Grid Meter' and its ID '01234567'. A red arrow points from a text box to this ID. The text box says 'Note that the SoCalGas meter is named using only its 8-digit meter number'. A large red arrow points from the bottom of the page to the 'Apply Selections' button.

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 show a green banner at the top, confirming you have successfully associated your meters with your property.

The screenshot shows the 'Summary' tab in Portfolio Manager for 'Demo Office Building\_abridged'. The page has tabs for MyPortfolio, Sharing, Planning, Reporting, and Recognition. A green banner at the top says 'Congratulations! You have successfully associated meters to your property(ies).'

The page displays property information: 'Demo Office Building\_abridged', '100 Mission Street, San Francisco, CA 94105', 'Portfolio Manager Property ID: 4075701', 'Primarily: Office', and 'Year Built: 2010'. There is a link to 'Map It' and a 'Not eligible to apply for ENERGY STAR Certification' badge.

The 'Weather-Normalized Source EUI (kBtu/ft²)' section shows 'Current EUI: N/A' and 'Baseline EUI: N/A'.

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.' and a 'Create Profile' button. There is also a 'Source EUI Trend (kBtu/ft²)' section with a line graph.

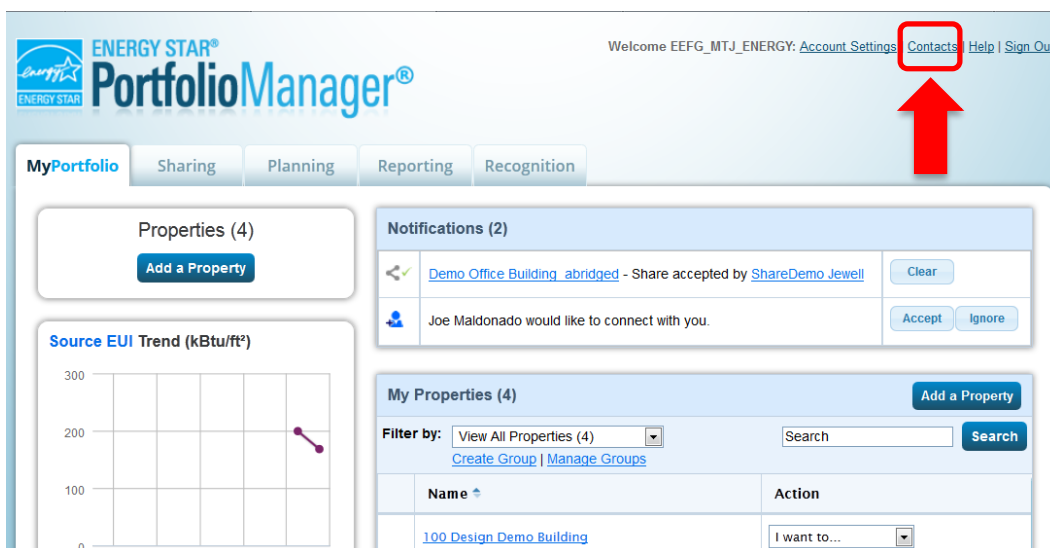
The 'Notifications' section says 'You have no new notifications.' The 'Data Quality for this Property' section says 'The metrics that Portfolio Manager calculates depend on your use details and your energy bills. The data quality checker inspects the information you have entered to identify possible errors. If a property is shared with you as "Read Only," you will not be able to run the Data Quality Checker.'

## SECTION 3 | How to Enroll in SoCalGas' Web Services

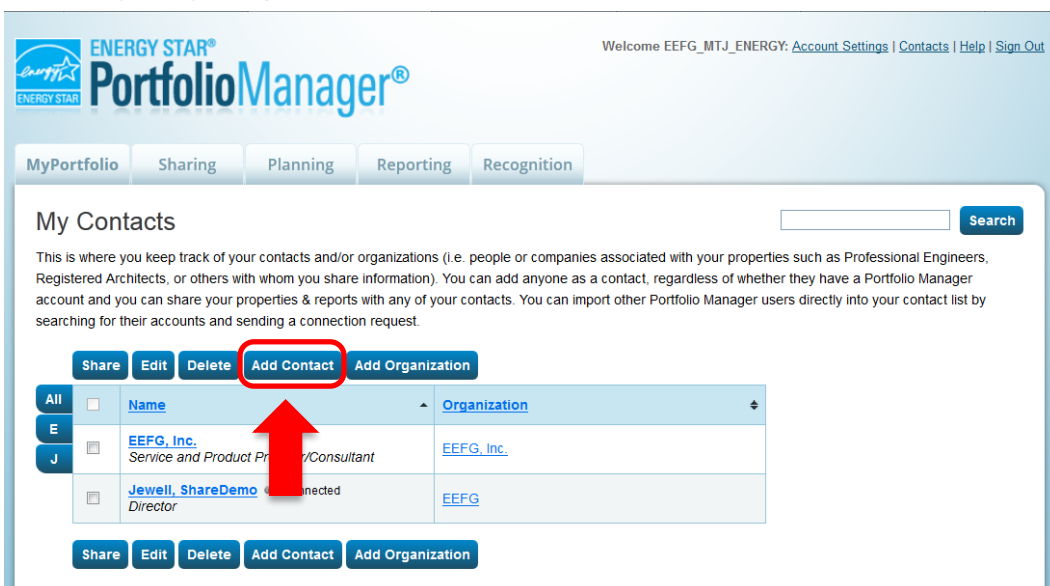
Before enrolling in SoCalGas' Web Services, make sure that:

- All of the meters accounting for the building's total energy consumption have been added to the property profile.
- You have collected the numbers you need for each meter. You will need your 8 digit meter number, your 10 digit billing account number (drop last digit), and the Total Cost amount (including cents) from your latest bill.
- All of your gas meters have been named using only their full 8 digit meter number, with no additional text either before or after the meter number. If this is not done, go back and rename your meters prior to sharing them with SoCalGas.
- The city name is spelled correctly in the address for each property.
- Any manually entered meter data has been downloaded into Excel and saved if historical meter data from SoCalGas is desired. (Web Services will write over existing data, and will remove all data relating to cost.)

- 3.1 To set up Web Services, the first step is to connect with SoCalGas as a contact. Click on the **Contacts** link at 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 SoCalGas by entering “**Southern California Gas**” as the **Name**. Click **Search**.

**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:

Organization:

Username:

Email:

**Search** [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.

**Organizing Personal Contacts by Organization**

- 3.3b After the page refreshes, “**Southern California Gas Company, Program Advisor with SCG**” will appear on the right-hand side of the page. Click “**Connect**”.

**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:

Organization:

Username:

Email Address:

**Search**

**Southern California Gas Company, Program Advisor with SCG** **Connect**

Page 1 of 1



- 3.4 Next, carefully read all of SoCalGas' Terms of Use. Scroll down, read everything carefully, and agree to Southern California Gas' Terms of Use. Finally, click **Send Connection Request**

**Send a Connection Request to [Southern California Gas Company](#) to Begin Exchanging Data**

[Southern California Gas Company](#) requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [Southern California Gas Company](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use:

**AUTHORIZATION FOR UTILITY TO RELEASE CUSTOMER USAGE DATA TO ENERGY STAR® PORTFOLIO MANAGER INTERNET APPLICATION**

**AND**

**NON-DISCLOSURE AGREEMENT**

This AUTHORIZATION FOR UTILITY TO RELEASE CUSTOMER USAGE DATA TO ENERGY STAR® PORTFOLIO MANAGER INTERNET APPLICATION AND NON-DISCLOSURE AGREEMENT ("Agreement") is an agreement between the owner or operator ("Owner/Operator") of the building(s) identified by Owner/Operator (each, a "Building") in the Environmental Protection Agency's ("EPA") Energy Star® Portfolio Manager application ("Portfolio Manager") and Southern California Gas

Agree ☒ I agree to my provider's ([Southern California Gas Company](#)) Terms of Use

**Send Connection Request** [Cancel](#)

- 3.5 The top of the next page will show a green bar, confirming your connection request was sent to SoCalGas. **Note:** You are not yet connected to SoCalGas until they accept your request. You will receive a notification in Portfolio Manager when SoCalGas accepts your request. This process takes 24 to 48 hours.

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

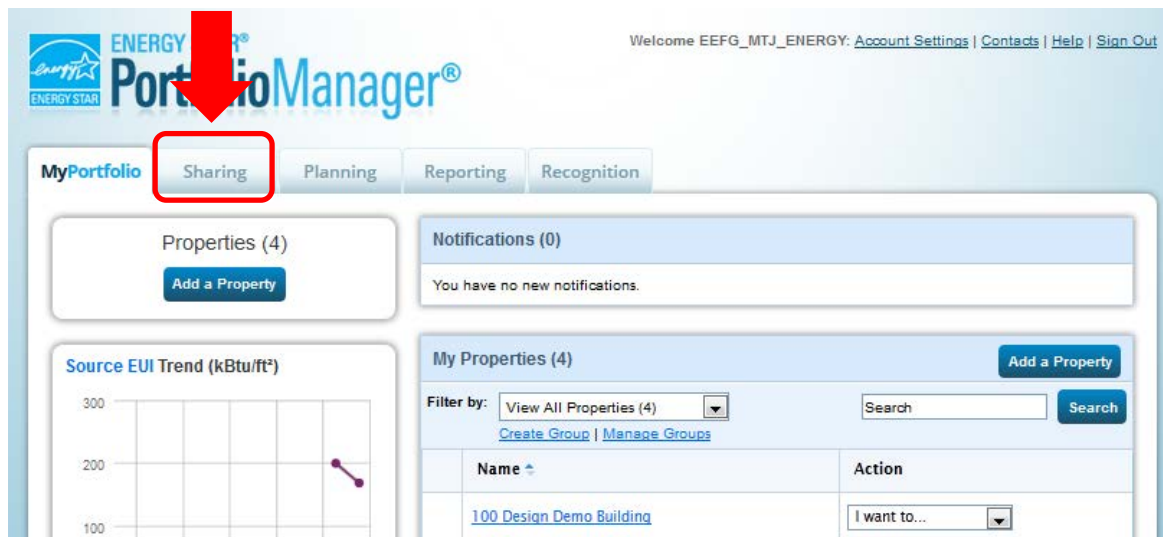
You have successfully sent a connection request to Southern California Gas Company. When Southern California Gas Company has accepted your request, you will be able to share properties and, therefore, authorize this provider to begin exchanging data with your property(ies).

**Search Results**

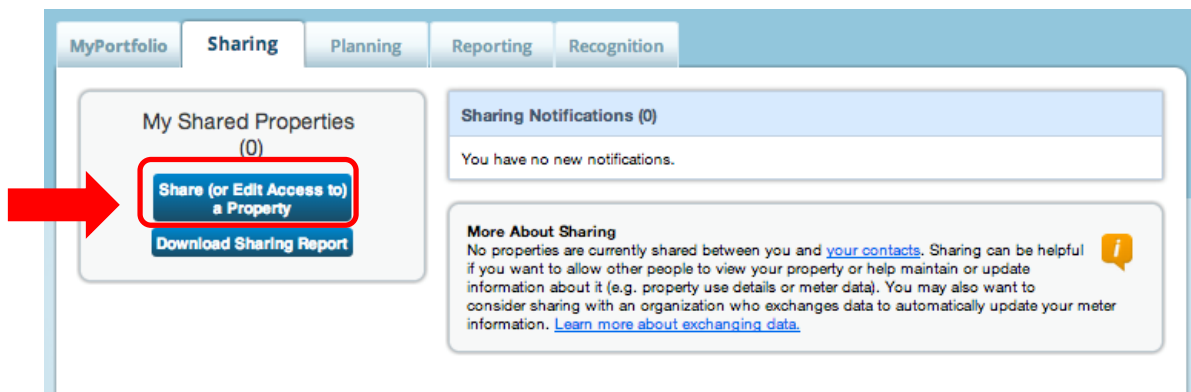
The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you 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

- 3.6 After you have received notification that SoCalGas has accepted your connection request, the next step is to share your property(ies) with SoCalGas through your Portfolio Manager account. Go to the **Sharing** tab.



- 3.7 Click **Share (or Edit Access to) a property** as shown on this screen.



- 3.8 Next, make your choices under **Select Properties** to Share. Use the drop-down windows to choose the number of building(s) you would like to share with SoCalGas, and then indicate which specific buildings. Next, under **Select People (Accounts)** to Share With, highlight SoCalGas as the **Account** with which you would like to share. Lastly, under **Permissions**, select the setting for Exchange Data. Click **Continue**.

MyPortfolio

Sharing

Planning

Reporting

Recognition

## Share (or Edit Access to) Properties

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. If you have already shared properties, you can also use this form to edit people's access to your properties.

1

### Select Properties

We'll 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

Demo Office Building\_abridged

2

### 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:

Gas Company, Southern California

Gucciardi, Beth

Gucciardi, Beth

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

3

### Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

- ☐ **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).
- ☒ **Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

### 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. **Note, you cannot share in bulk for "Exchange Data."**

### Who gets to Share Forward?

**Full Access** - Automatically includes "Share Forward" rights  
**Read Only** - Automatically does NOT include "Share Forward" rights  
**Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.  
**Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Continue

Cancel

19

- 3.9a On the next screen, select the **Exchange Data** radio button as the permission level to grant SoCalGas. When you do, a pop up box opens, as seen in the next screen shot.

**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.

**4** **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: **Property Name**

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
<b>Demo Office Building_abridged</b> (3636980)					
<a href="#">Southern California Gas Company</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

**Share Property(ies)** [Cancel](#)

**Who gets to Share Forward?**  
**Full Access** - Automatically includes "Share Forward" rights  
**Read Only** - Automatically does NOT include "Share Forward" rights  
**Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.  
**Data Exchange** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

- 3.9b Enter either capital Y or capital N depending on your reason for requesting the data exchange, and whether you need monthly bills or not going forward. For Property Information select FULL Access. Note: This window is longer than it appears here. To see all fields you must scroll down.

**permissions.**

### Select Exchange Data Access Permissions to [Demo Office Building\\_abridged](#) for [Southern California Gas Company](#).

[Southern California Gas Company](#) requires the following information in order to provide services to your property(ies). If you have any questions about how to complete this information, please contact [Southern California Gas Company](#).

Is this property being benchmarked because of AB1103? [Y/N]:   
Answer [Y] if you are requesting data for this property to comply with AB1103.; 1 - 1 Characters More Information

Do you require monthly meter updates? [Y/N]:   
Answer [Y] if you require SCG to update the meters for this property.; 1 - 1 Characters More Information

Please select the permission level you would like to grant [Southern California Gas Company](#) for [Demo Office Building\\_abridged](#) for each category. If "None" is selected for all items, [Southern California Gas Company](#) will not receive any access to this property.

Item	None	Read Only Access	Full Access	Bill Account Number1	Last Bill Amount2
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
<b>All Meter Information</b>					

- 3.9c Scrolling down, fill in the required fields. You will need the Bill Account Number (must be only ten digits, so drop the last digit), and the Last Bill Amount (include dollars and cents) for each meter. Select full access for each gas meter you would like to connect with SoCalGas. Note: The gas meter is named here as required, using only its 8 digit meter # as the meter name.  
(If you can't get the last bill amount from your tenants, see Issue #4 in Troubleshooting, on p. 30.)

Choose NONE for Goals, Improvements, & Checklists, as well as NONE for Recognition.  
Leave all non-SoCalGas meters (like electric or water) set to NONE for level of access.

Select Exchange Data Access Permissions to [Demo Office Building\\_abridged](#) for [Southern California Gas Company](#).

Item	None	Read Only Access	Full Access	Bill Account Number <sup>1</sup>	Last Bill Amount <sup>2</sup>
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
▼ All Meter Information					
87654321	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	0012345678	123.45
Electric Grid Meter	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Electric Grid Meter #2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Goals, Improvements, & Checklists	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Recognition	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		

<sup>1</sup> Bill Account Number: Account number needs to include leading zeros. [Example: 0022456873] ; Between 10 and 10 Characters More Information

- 3.9d Set the **Share Forward** permission level to NO, then in the bottom right hand corner, click on blue box reading “**Apply Selections & Authorize Exchange**”. The pop up window will now close.

Select Exchange Data Access Permissions to [Demo Office Building\\_abridged](#) for [Southern California Gas Company](#).

Goals, Improvements, & Checklists	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Recognition	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		

<sup>1</sup> Bill Account Number: Account number needs to include leading zeros. [Example: 0022456873] ; Between 10 and 10 Characters More Information  
<sup>2</sup> Last Bill Amount: At Least 3 Character(s) More Information

Additional Options:

Item	Yes	No
<p>• <b>Share Forward</b></p> <p>Allow Southern California Gas Company to share this property with others and give them any permissions that he/she has, including the right to share with more people.</p>	<input type="radio"/>	<input checked="" type="radio"/>

**Apply Selections & Authorize Exchange** [Cancel](#)

- 3.9e Finally, it is **very important** that you select “**Share Properties**” to complete the process. Until you click “Share Property(ies)”, the selections you entered in the pop up window will not be submitted to SoCalGas.

**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
<a href="#">Demo Office Building_abridged</a> (3636980)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<a href="#">Southern California Gas Company</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <a href="#">Edit</a>

**Share Property(ies)** [Cancel](#)

- 3.10 A green banner will appear at the top of the **Sharing** tab confirming the request submission. Your request should be processed within 1-2 business days. Each shared meter will receive either 14 months of historical data only, or 14 months of meter history plus monthly updates going forward, depending on your selections of Y or N in Section 3.9b.

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

You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

**My Shared Properties (1)**

[Share \(or Edit Access to\) a Property](#)

[Download Sharing Report](#)

**Sharing Notifications (2) [View All](#)**

<a href="#">12048103</a> - Sharing request sent to <a href="#">Southern California Gas Company</a>	<a href="#">Cancel</a> <a href="#">Clear</a>
<a href="#">Demo Office Building_abridged</a> - Sharing request sent to <a href="#">Southern California Gas Company</a>	<a href="#">Cancel</a> <a href="#">Clear</a>

**Overview of Shared Properties [Learn more about Sharing Properties](#)**

By Contact ☒ By Property

Filter By:  [Search](#)

Name	Organization	Properties We Share	Action
<a href="#">Southern California Gas Company (SCG)</a>	SCG	1	<input type="text" value="I want to..."/>

Page 1 of 1

This table represents people with whom you share at least one property, either because you shared one with them, they shared one with you, or you both have access to another person's property. For complete sharing information, [download the Sharing Report](#) for your portfolio.

- 3.11 **Sharing Connection Results:**  
**Past Meter Energy Data**



For meters that have been successfully shared, SoCalGas will populate 14 months of energy data for that meter, but NOT in the following case:

- The meter or account number has existed less than 14 months (e.g., a meter in a new building, or a new tenant name on file as the customer of record).

### Existing Meter Energy and Cost Data

- SoCalGas' Web Services will overwrite existing meter entries for dates during the previous 14 months. Any data older than this will be left untouched. Please note: SoCalGas does not provide cost values, so if you have cost data entered for dates during the previous 14 months you wish to preserve, download your meter data into a spreadsheet (by downloading your entire Portfolio) prior to setting up Web Services. You may then add your cost information back into Portfolio Manager. Future monthly updates will not erase past cost data.

### Monthly Updates

For meters that have been successfully validated, SoCalGas will update the meter with new entries as new billing data becomes available, with the following exception:

- In certain cases 14 months of usage data will be provided to Portfolio Manager in a one-time data transfer for the purposes of benchmarking only. These users will not receive monthly updates.

## SECTION 4 | Changing Web Services Authorizations: Share Additional Properties and Meters, Share a New Meter, Remove Permissions, or Re-Setting an Existing Meter Share

### Sharing Additional Properties and Meters with SoCalGas' Web Services

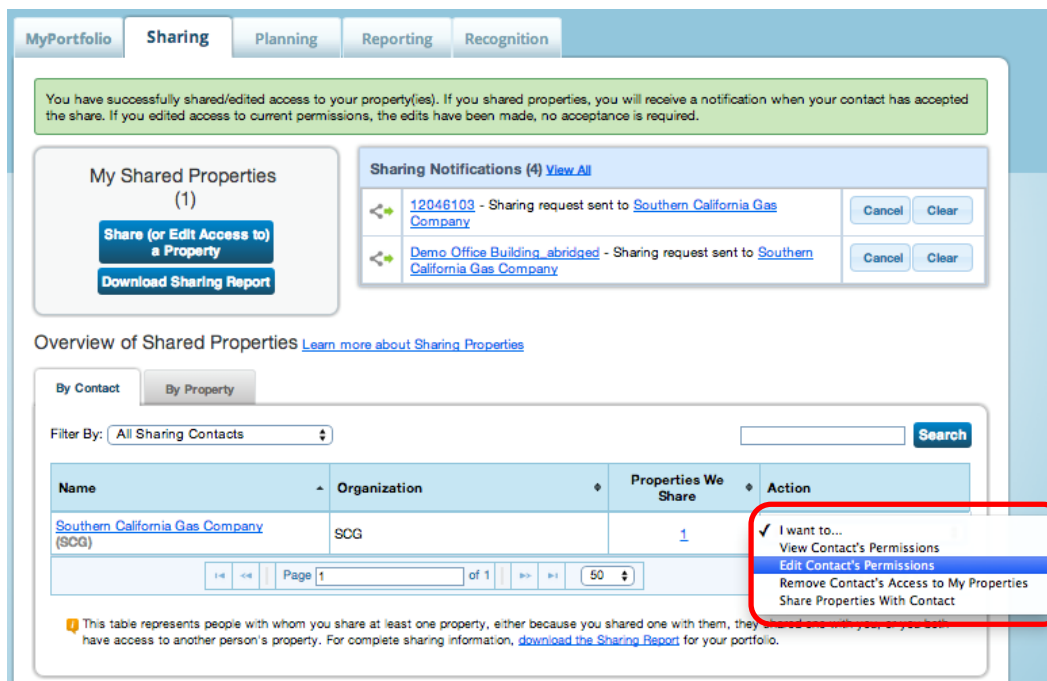
- 4.1 Once you are connected with SoCalGas you can share additional properties with SoCalGas in a few easy steps. On the **My Portfolio** tab, under the **Action** column, select **Share with Others** next to the property name you wish to share with SoCalGas.

The screenshot displays the 'MyPortfolio' application interface. At the top, there are tabs for 'Sharing', 'Planning', 'Reporting', and 'Recognition'. The 'Sharing' tab is active. On the left, there are two line graphs: 'Source EUI Trend (kBtu/ft²)' and 'Total GHG Emissions Trend (Metric Tons CO2e)'. The main area shows a 'Properties (9)' section with a table of properties. The 'Action' column for the 'Demo Office Building\_abridged' property is expanded, showing a dropdown menu with the option 'Share with Others' highlighted. Above the table, there are filters and a search bar. To the right, there are notifications for sharing requests sent to 'Southern California Gas Company'.

- 4.2 Next, follow the step-by-step instructions beginning in Section 3.8 to connect the additional property and its meters with SoCalGas' Web Services. Finish making your additions, then click "**Apply Selections & Authorize Exchange**". The pop up window will close. Then, click "**Share Property(ies)**" to finalize your new share.

## Authorizing Additional Meters

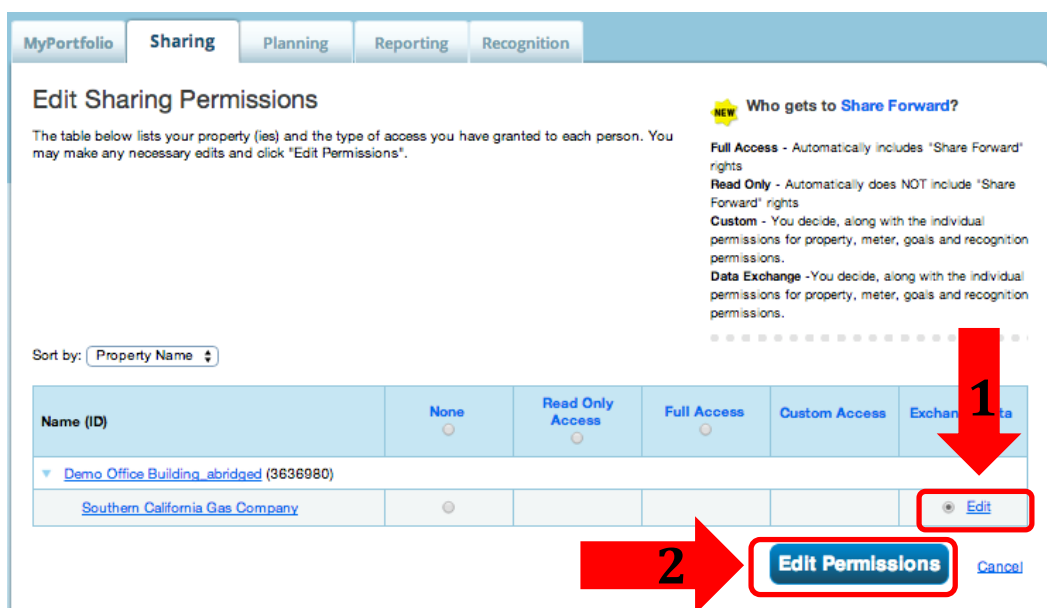
- 4.3a If you added a new gas meter to a property in Portfolio Manager which is already set up for Web Services data exchange with SoCalGas, using these directions you can share this additional meter with SoCalGas. From the Sharing tab, under the **Action** drop-down menu to the right of SoCalGas, select **Edit Contact's Permissions**.



The screenshot shows the 'Sharing' tab in the Portfolio Manager interface. The 'My Shared Properties' section shows one property shared with 'Southern California Gas Company'. The 'Sharing Notifications' section shows two notifications. The 'Overview of Shared Properties' section shows a table with one row for 'Southern California Gas Company (SCG)'. A red box highlights the 'Action' column for SCG, and a red arrow points to the 'Edit Contact's Permissions' option in the dropdown menu.

Name	Organization	Properties We Share	Action
<a href="#">Southern California Gas Company (SCG)</a>	SCG	1	<div>✓ I want to... View Contact's Permissions <b>Edit Contact's Permissions</b> Remove Contact's Access to My Properties Share Properties With Contact</div>

- 4.3b When the page refreshes, you will see the screen called Edit Sharing Permissions. First (1) click on the blue **Edit** link highlighted below; a pop up window will open. Follow the step by step instructions in Section 3.8 to authorize a data exchange for your new meter, then click "**Apply Selections &**



The screenshot shows the 'Edit Sharing Permissions' page. The page has a header with 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition' tabs. Below the header is a section titled 'Edit Sharing Permissions' with a description: '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".' To the right of this section is a 'Who gets to Share Forward?' section with a 'NEW' badge and four options: 'Full Access', 'Read Only', 'Custom', and 'Data Exchange'. Below this is a table with columns: 'Name (ID)', 'None', 'Read Only Access', 'Full Access', 'Custom Access', and 'Exchange Data'. The table has one row for 'Southern California Gas Company'. A red box highlights the 'Edit' link in the 'Exchange Data' column. A red arrow points to the 'Edit Permissions' button at the bottom right.

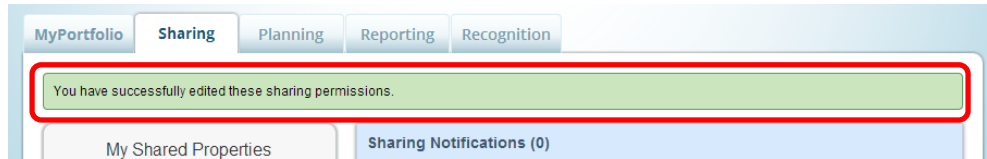
Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
<a href="#">Demo Office Building_abbreviated (3636980)</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<a href="#">Southern California Gas Company</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> <a href="#">Edit</a>

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



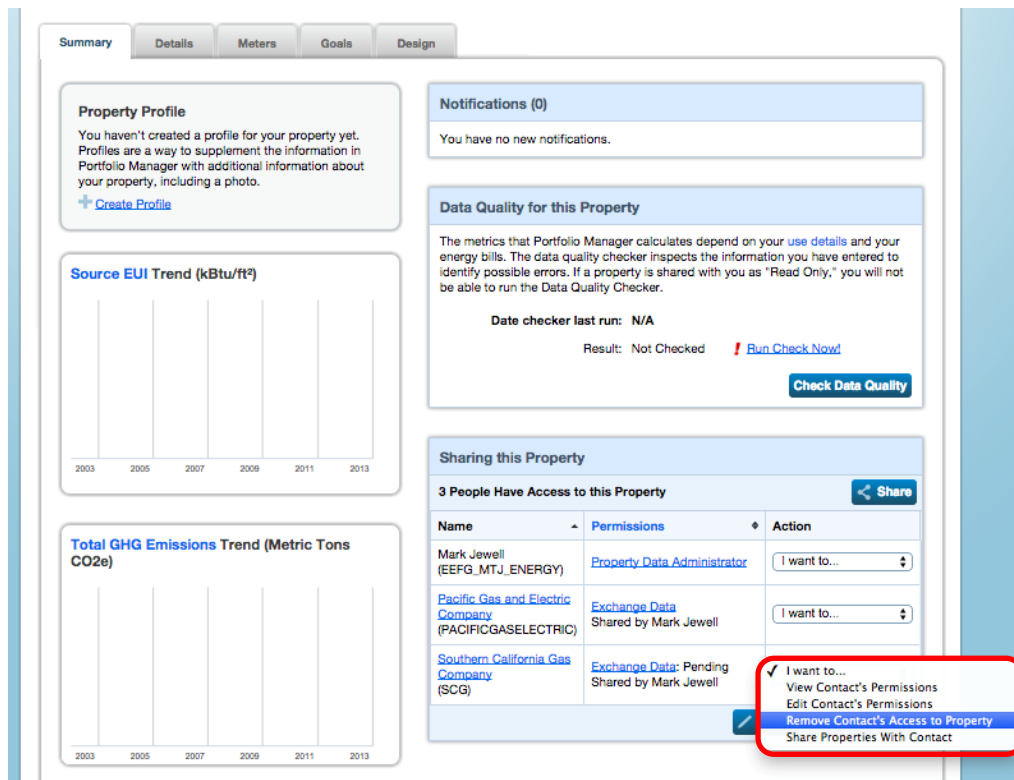
**Authorize Exchange**". The pop up window will now close. Second (2) finalize your changes by clicking on **Edit Permissions**.

A green banner confirms that you have successfully edited your sharing permissions.

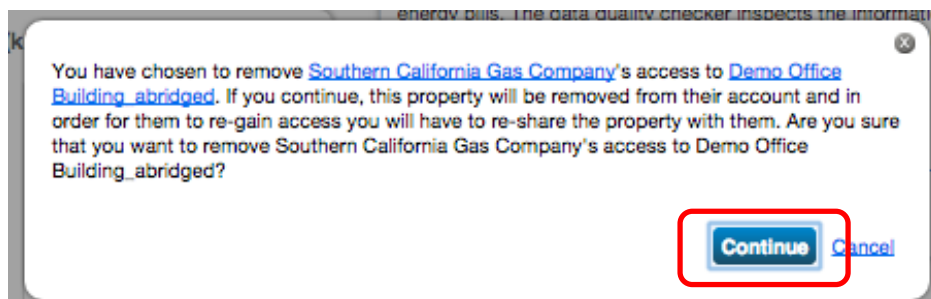


## Removing Permissions for Specific Properties and/or Meters

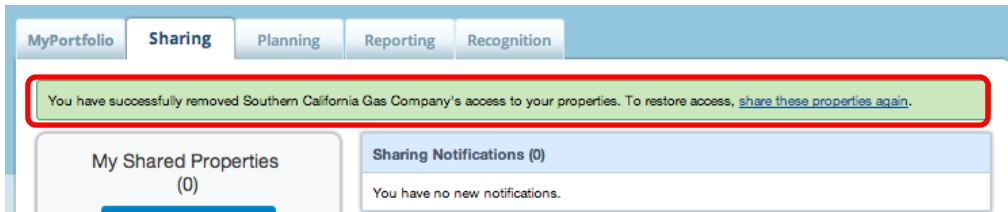
- 4.4 From the property profile **Summary** tab, under the **Action** drop-down menu for SoCalGas, you have several options, including **"Edit Contact's Permissions"** or **"Remove Contact's Access to My Properties"**.
- 4.4a To stop sharing your property and all associated meters with SoCalGas, select **Remove Contact's Access to My Property**.



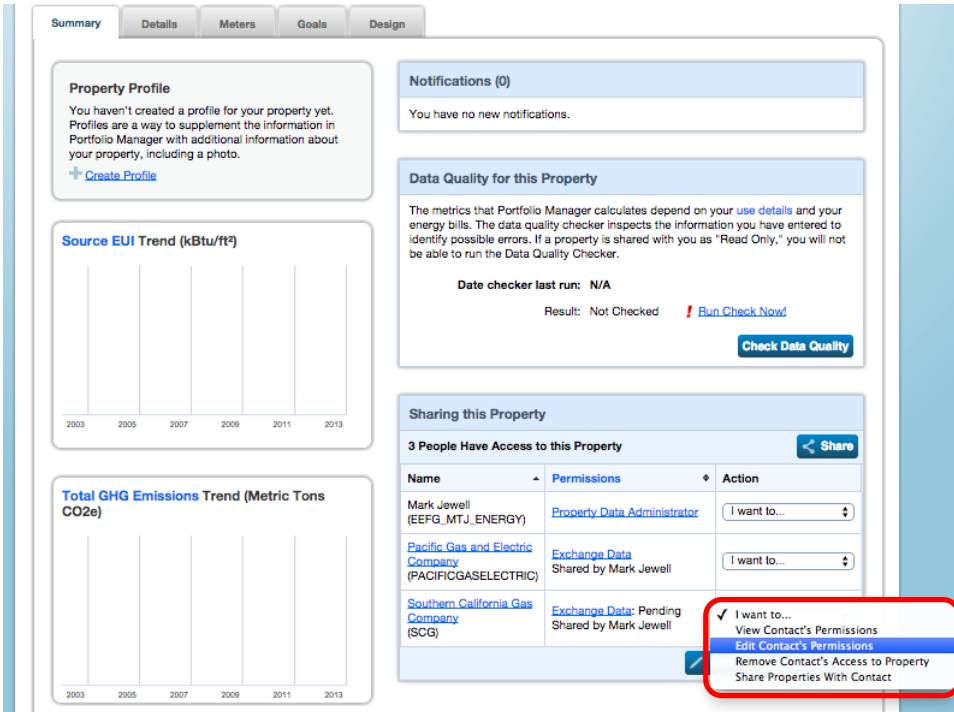
A pop-up window will confirm that you want to remove SoCalGas' access for this site. Click **Continue**.



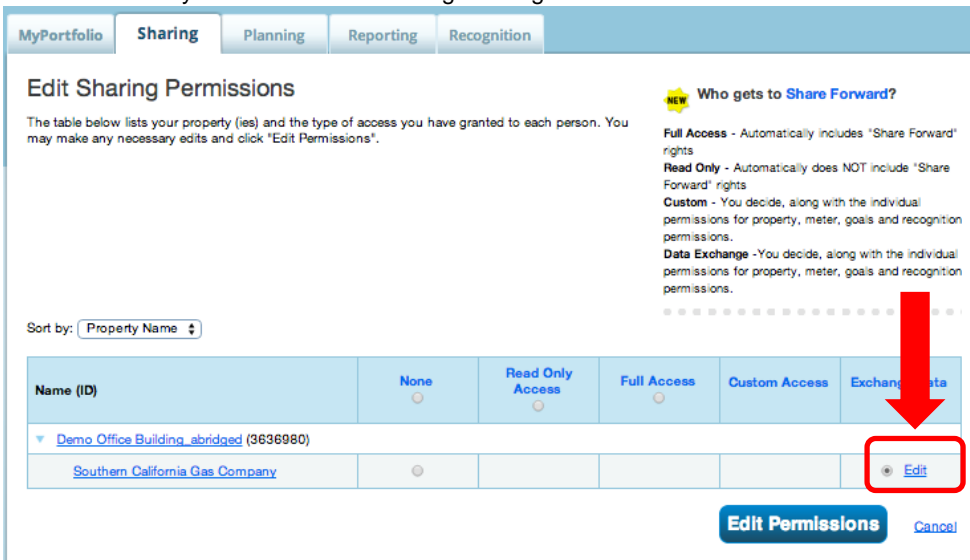
A green banner will confirm that you have stopped sharing your building (and associated meters) with SoCalGas. No new meter data will be uploaded from SoCalGas for this site going forward. Existing meter data previously uploaded into Portfolio Manager from SoCalGas will not be removed, however.



4.4b To remove SoCalGas' access to individual meters, select **Edit Contact's Permissions**.



The next screen you'll see is called Editing Sharing Permissions. Click on the word Edit.



For gas meters you would like to **remove** from SoCalGas' access, change the permissions level from FULL to **NONE**. Then scroll down and click "**Apply Selections & Authorize Exchange**" button. This pop up window will then close.

Select Exchange Data Access Permissions to [Demo Office Building\\_abridged](#) for [Southern California Gas Company](#).

Is this property being benchmarked because of AB1103? [Y/N]:   
 Answer [Y] if you are requesting data for this property to comply with AB1103.; 1 - 1 Characters More Information

Do you require monthly meter updates? [Y/N]:   
 Answer [Y] if you require SCG to update the meters for this property.; 1 - 1 Characters More Information

Please select the permission level you would like to grant [Southern California Gas Company](#) for [Demo Office Building\\_abridged](#) for each category. If "None" is selected for all items, [Southern California Gas Company](#) will not receive any access to this property.

Item	None	Read Only Access	Full Access	Bill Account Number1	Last Bill Amount2
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
▼ All Meter Information					
87654321	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	0012345678	123.45

Be sure to finish up by clicking on the **Edit Permissions** button to finalize the change.

**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:

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Demo Office Building_abridged (3636980)					
<a href="#">Southern California Gas Company</a>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/> Edit

**Edit Permissions** Cancel

A Green banner confirms that you have successfully edited you meter sharing permissions.

**MyShared Properties**

You have successfully edited these sharing permissions.

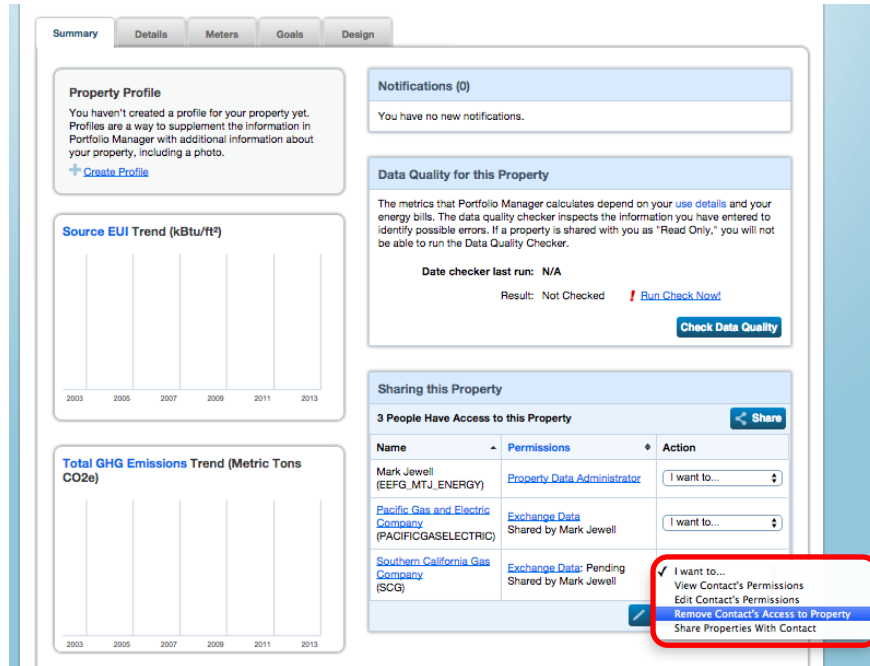
Sharing Notifications (0)

**Note: For unshared properties and meters:** If you have stopped sharing your individual meter or entire property with SoCalGas, going forward SoCalGas will no longer provide any use data, but any existing meter entries will not be removed from Portfolio Manager. Additionally, your contact Connection with SoCalGas will still be preserved.

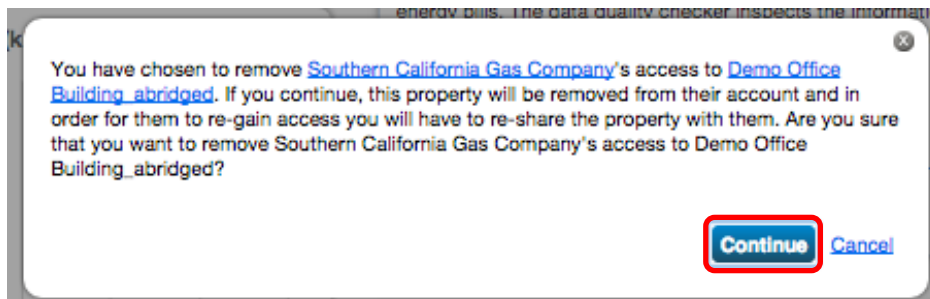
## Re-Setting an Existing Meter Share

- 4.5 If you have an existing meter share with SoCalGas that is no longer uploading data, or if you made a mistake when setting up a meter share and the share did not go through properly, use the following steps to fix your existing meter share. **Note: Do NOT use the “Edit My Contact’s Permissions” option to adjust an existing meter share because SoCalGas will not “see” your edits, even though your changes will appear to have taken effect in Portfolio Manager.** To Re-Set an existing meter share to fix an issue, there are three steps required: (1) un-share the property and its meters with SoCalGas, (2) make your edits (for example change your meter name to the 8 digit meter number), (3) then set up a brand new share of the property and its meters with SoCalGas using the correct information.

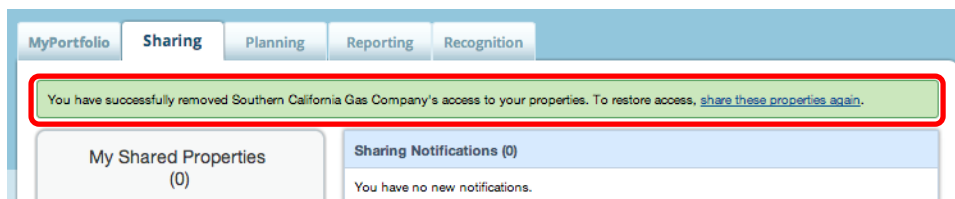
- 4.5a **Step 1.** Stop sharing your property and all associated meters with SoCalGas by selecting **Remove Contact’s Access to Property** from the Summary tab of Portfolio Manager.



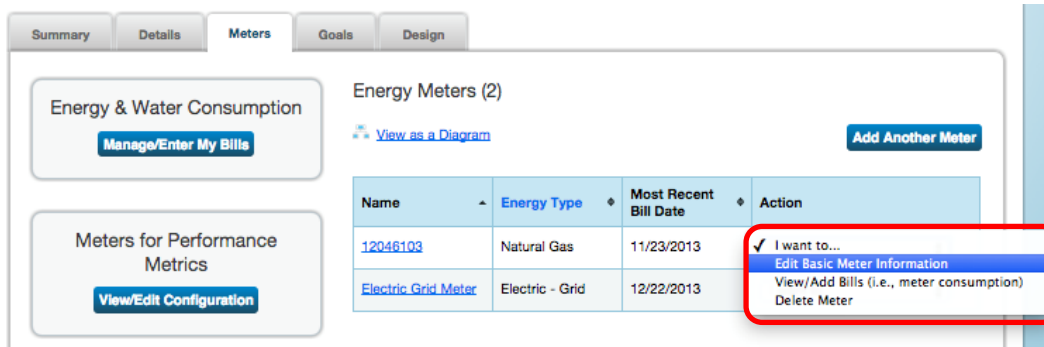
A pop-up window will confirm that you want to remove SoCalGas' access for this site. Click **Continue**.



A green banner will confirm that you have stopped sharing your building (and associated meters) with SoCalGas. No new meter data will be uploaded from SoCalGas for this site going forward. Existing meter data previously uploaded into Portfolio Manager from SoCalGas will not be removed, however.



- 4.5b **Step 2.** Make your edits as necessary. For example, if you need to change your meter name to the 8 digit meter number, go to the Meters tab for the property you are working on, and select **Edit Basic Meter Information**. Note: If your error did not involve the meter number, go directly to step 3, in Section 4.5c.



Change your meter name by typing the 8 digit meter number into the Name text field shown below, then click Save Changes.

**Edit 12046103 for Demo Office Building\_abridged**

**Basic Meter Information**

Name: 12046103

Type: Natural Gas

Units: therms

If you change the units, Portfolio Manager will not convert the quantity on any bills you have already entered to the new units. Any edits to units assumes that all quantities entered (past, present and future) are in the units selected. This can/will affect metric calculations that use this meter.

Date Meter became Active: 1/1/2011

☒ Still In Use

Date Meter became Inactive:

**Save Changes** Cancel

- 4.5c **Step 3.** Set up a new share with SoCalGas for the property and its meter(s). Follow the steps outlined in Sections 3.7 through 3.10 carefully, making sure to enter all details correctly, such as the account number and last bill amount. You may find when you get to the step in 3.9b where the pop-up window opens that the numbers you entered on your first attempt to share the property and its meter(s) are still there. If you do see your old data, be sure to fix any errors in the account number or last bill amount. If these fields are blank when the pop-up window opens, fill them out again carefully. Be sure to select the permissions levels exactly as described in Section 3.9b and 3.9c, and then save your selections as described in Sections 3.9d and 3.9e. You should see a data upload from SoCalGas within one business day. If you still do not see use data in your meter(s), or if you know you made a data entry error, repeat the un-share/re-share steps described here in Section 4.5, correcting any inaccuracies in data entry or permissions levels chosen.

## SECTION 5 | Troubleshooting

### Issue #1:

**I enrolled my building in SoCalGas' Web Services and it's been more than one business day. However, my energy data still hasn't been uploaded to Portfolio Manager.**

### Solution #1:

Omitting one or more of the steps below will cause SoCalGas' Web Services system to be unable to process your request to upload energy data. After carefully completing **all** of these steps, you should see your energy use history uploaded within one business day.

1. Make sure all of your **"Meter Name"** fields on the Meter tab are populated only by active **SoCalGas meter numbers**, (not a name like "Gas Meter 2<sup>nd</sup> Floor"). Meter numbers should be entered using leading zeroes so they contain 8 digits.
2. When submitting your connection request to SoCalGas, read the terms of use and checkmark the **"I agree to my provider's terms of use"** box. Then press **"Send Connection Request"**.
3. When you initiate sharing the property(ies) of interest with SoCalGas, choose **"Exchange Data"** level of permissions.
4. In the pop-up window entitled "Select Data Exchange Access Permissions", fill out all fields marked with a red asterisk. Be sure to choose **Read Only Access** on the **Property** itself, and **Full Access** for each **Meter** you are setting up in Web Services. Leave Permissions Levels for any electric meters set to None. Add only the first ten digits of the **Bill Account Numbers**, and add **Last Bill Amounts** with both dollars and cents. When everything is entered correctly, press **"Apply Selections & Authorize Exchange"**.
5. When the pop-up window closes, you must then click on **"Share Property(ies)"**.
6. A sample bill is included below to help you find the required data:
  - a. **SoCalGas Account Number** (Use only the first 10 digits. Drop the very last digit.)
  - b. **SoCalGas Meter Number** (must be an active meter)
  - c. **Last Bill Amount** (Total amount of last bill, including any late fees or credits)

USE ONLY THE  
FIRST TEN DIGITS  
OF THE ACCOUNT  
NUMBER! Drop  
the Last Digit.

**Account Summary**

Previous Balance - Unpaid Amount Due Now	\$264.63
Payment Received 01/25/11	- 264.63
Current Charges	+ 75.01
<b>Total Amount Due</b>	<b>\$75.01</b>

**Current Charges**

Meter Number: 12046103 Next scheduled read date Mar 17 2011

Billing Period	Days	Current Reading	Previous Reading	= Difference	x Billing Factor	= Total Therms
01/13/11 - 02/15/11	33	5399	5328	71	0.990	70

**GAS CHARGES**

Customer Charge	33 Days x \$.16438	5.42
Gas Service (Details below)	70 Therms	
Therms used	Baseline Over Baseline	
	56 14	
Rate/Therm	\$ .76911	\$1.01929
Charge	\$43.07	+ \$14.27
		= 57.34
		<b>Total Gas Charges \$62.76</b>

**TAXES & FEES ON GAS CHARGES**

State Regulatory Fee	70 Therms x \$.00068	.05
Public Purpose Surcharge	70 Therms x \$.07687	5.38
Los Angeles City Users Tax	\$68.19 x 10.00%	6.82
		<b>Total Taxes and Fees on Gas Charges \$12.25</b>
		<b>Total Current Charges \$75.01</b>

**Gas Usage History (Total Therms used)**

Month	Total Therms used	Daily average Therms	Days in billing cycle
Feb 10	133	4.0	33
Jan 11	141	4.9	29
Feb 11	70	2.1	33

Need help paying your SoCalGas bill? You may qualify for available assistance. Visit [socialgas.com/extrahelp/](http://socialgas.com/extrahelp/).

Seal leaky air ducts and weather-strip drafty doors and windows to help keep heated air inside your home this winter. Look for more energy-saving tips at [socialgas.com](http://socialgas.com).

The Gas Company's gas commodity cost per therm for your billing period:  
Feb. .... \$.47390 Jan. .... \$.40136

**DATE DUE** Mar 10, 2011  
**AMOUNT DUE** \$75.01

If energy data is still not uploaded within one business day, you may be requesting data for a "closed" account. SoCalGas is unable to provide energy use history for closed accounts at this time.

For additional help with the SoCalGas Web Services system, contact the help desk at [SCGBenchmarking@semprautilities.com](mailto:SCGBenchmarking@semprautilities.com).

## **Solution #2**

Remove the check digit from the account number (the very last number of the account number should not be included). The account number seen below would be correctly added to Portfolio Manager as **9876543210**.

ACCOUNT NUMBER 987 654 3210 3  
SERVICE FOR  
JOHN Q PUBLIC  
1801 S ATLANTIC BLVD  
MONTEREY PARK CA 91754-5207

## **Issue #2:**

**I forgot to add a meter to my Portfolio Manager record, and I already set up Web Services. What should I do?**

### **Solution:**

If you need to add a meter after setting up Web Services, you can still set up a data upload for this meter. Add the meter following the steps described in Sections 2.9 through 2.12. Then, share the meter with SoCalGas as shown in Sections 4.3a and 4.3b. Don't forget to configure your new meter, as shown in Issue #5.

## **Issue #3:**

**SoCalGas' Web Services uploaded my energy use history, but I still haven't received my benchmark score from Portfolio Manager.**

### **Solution:**

There are many reasons why your facility may not have a rating. The best way to find out why is to click on the link that says "N/A" next to the facility name, where the score would otherwise appear. Reasons will be displayed. Also, evaluating your data by running the Data Quality Checker can identify issues with your record. This helpful tool is found on the Summary Tab of Portfolio Manager.

For additional assistance with Portfolio Manager and your benchmark score, visit the Frequently Asked Questions page here <http://energystar.supportportal.com/>, contact the EPA's Help Desk at [buildings@supportportal.com](mailto:buildings@supportportal.com), or call the ENERGY STAR Hotline from 9:00 am - 5:00 pm EST at (888) STAR-YES / (888-782-7937) or 703-412-3086.

## **Issue #4:**

**I am faced with the prospect of requesting last bill amount information from all of my tenants. Is there any other way to get the energy use from these tenant-billed meters added to Portfolio Manager?**

### **Solution:**

There is another way to get the site energy use data you need. You can initiate a data transfer into your Portfolio Manager account, or receive use data in a spreadsheet from SoCalGas, without having the Last Bill Amount from each tenant's account. You will need to ask each tenant to fill out and sign the following form:

<http://www.socalgas.com/documents/business/benchmarking/cisr-form-8206.pdf>

You will also need to sign this document. Your tenant will want to have the service account address and service account number for all accounts in his or her name handy in order to fill out this form completely.

Once the document is filled out and signed by both parties, submit it to SoCalGas in one of the following two ways:

- 1) Email to: [SCGBenchmarking@semprautilities.com](mailto:SCGBenchmarking@semprautilities.com)
- 2) Mail to: Benchmarking, 555 W. Fifth Street, MLGT19A8, Los Angeles, CA 90013



**IMPORTANT:** If you want to have SoCalGas upload your data into Portfolio Manager, make sure your tenant checks the box reading “EPA Benchmarking” (authorizes usage information to be uploaded into the EPA’s ENERGY STAR Portfolio Manager) when they fill out this form. Please note: You will still need to share your property and meters with SoCalGas in Portfolio Manager. When you fill out the pop-up window described in detail in Section 3.9, follow all the directions as listed, **BUT** leave the account number and last bill date blank, as shown below:

Select Exchange Data Access Permissions to [Demo Office Building\\_abridged](#) for [Southern California Gas Company](#).

Is this property being benchmarked because of AB1103? [Y/N]:   
 Answer [Y] if you are requesting data for this property to comply with AB1103.; 1 - 1 Characters More Information

Do you require monthly meter updates? [Y/N]:   
 Answer [Y] if you require SCG to update the meters for this property.; 1 - 1 Characters More Information

Please select the permission level you would like to grant [Southern California Gas Company](#) for [Demo Office Building\\_abridged](#) for each category. If "None" is selected for all items, [Southern California Gas Company](#) will not receive any access to this property.

Item	None	Read Only Access	Full Access	Bill Account Number1	Last Bill Amount2
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
▼ All Meter Information					
87654321	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text"/>	<input type="text"/>

#### Issue #5:

**I got distracted when I was adding my building to Portfolio Manager, and I forgot the step “Configure my Meters”. Now I’m getting this error: “I did add meters to my property. Why doesn’t Portfolio Manager recognize them?”**

#### Solution:

You can go back later and complete the Meter Configuration step you missed. To associate a meter or meters with your property, go to the Meters tab and select “View/Edit Configuration” under Meters for Performance Metrics. Then check the boxes next to all meters which account for the total energy use for your site. These are the meters that should be included in calculations for the site’s performance metrics. This step is part of the process because there may be one or more sub-meters at the site which track use only for the purposes of billing a tenant for example, and if counted would represent a redundancy. Portfolio Manager allows you the power to select which meters to count toward the site’s total energy use, so you can leave out any redundant meters that should not be included in the site’s performance metrics calculations.

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 type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	12046103
<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.



## SECTION 6 | Frequently Asked Questions (FAQs)

### 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”. You will be billed by the utility only for the difference, or 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 into Portfolio Manager via Web Services will reflect only this net amount. The utility grid meter populated via web services does not record the output of the on-site system. Portfolio Manager requires that sites using net energy meters enter two separate meters:

- **One meter for On-Site Generation:** This is the amount generated by the on-site system. The utility does not have this data; you will need to collect it from the on-site 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 the utility and can be found on your monthly billing statement. Web Services can be used to add data 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.

### How can I improve my ENERGY STAR® score?

SoCalGas wants to help you improve your score!

Learn about the many programs that can help you save energy and money by visiting [SoCalGas' For My Business](#) web page or by calling our Business Customer Service line at **800-427-2000**. Energy Efficiency programs featuring rebates, services, training, and financing for new high efficiency equipment are just some of the options SoCalGas offers to help you reduce waste, save energy, and save money.

### Where can I get more help?

SoCalGas offers in-person benchmarking training sessions to help you get up to speed with Portfolio Manager.

Check the SoCalGas [online training calendar](#) to register for an upcoming event.

For additional information contact the help desk at [SCGBenchmarking@semprautilities.com](mailto:SCGBenchmarking@semprautilities.com).

### Helpful Web Sites

SoCalGas' Benchmarking page:

<http://socalgas.com/for-your-business/energy-savings/benchmarking.shtml>

SoCalGas' For My Business Web page:

<http://socalgas.com/for-your-business/>

ENERGY STAR Portfolio Manager Login page:

[www.energystar.gov/portfoliomanager](http://www.energystar.gov/portfoliomanager)

EPA Portfolio Manager FAQs:

<http://portfoliomanager.supportportal.com/ics/support/KBSplash.asp>

California Energy Commission (CEC) FAQs:

<http://www.energy.ca.gov/ab1103/>

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