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THE PECO SMART ENERGY USAGE DATA TOOL (PSEUDT)

1. INTRODUCTION

The PECO Smart Energy Usage Data Tool (PSEUDT) was developed to aggregate multi-tenant commercial building energy and gas usage, which, to date, has been a laborious and manual process. This application helps meet the rising demand of such requests by making retrieval of Building Energy Usage Data fast, simple and more reliable. This results in a reduced turn-around time in comparison to legacy systems with which retrieval can take days.

This guide provides an overview of the features and steps for Building Managers using this application.

Within PSEUDT, a Building Manager can perform the following activities:

User Management
- View/Edit My Profile Information (for his or her own account)
- Change the password (for his or her own account)

Request Management
- Make New Usage Data Requests
- View/Edit/Delete Recurring Usage Data Requests
- View/Delete Usage Data Requests
- Verify Tenant List

Note:
- Building Managers can only modify their own user profile information.
- Building Managers can only view requests and reports associated with requests that they created and submitted themselves.
- Only Building Managers may verify tenants.

2. GETTING STARTED

The Getting Started section covers logging in to PSEUDT, accessing the Dashboard, and using the Contact Us links.

Let’s begin...

2.1 LOGGING IN TO PSEUDT

To log in to PSEUDT:

The *User Authentication* page appears:

2. Enter your **Username** and **Password** into the fields.

The *PSEUDT Dashboard* appears.

### 2.2 THE PSEUDT DASHBOARD

The *Dashboard* is the screen that greets the user upon logging in. It provides quick access to the features and information within the system.

*Note:* The above-displayed screenshot shows the Dashboard view for the Building Manager User Type. A user’s view of the Dashboard varies depending on his or her User Type.
The PSEUDT dashboard can be quickly accessed from almost any page within the application by clicking on the **Dashboard** button at the top or bottom of the screen.

As a Building Manager, much of the work you will be doing within PSEUDT is in managing Usage Data Requests. The **Request Summary** section of the dashboard facilitates this and includes the following quick reference information:

**Request Summary:**

- **This Year** – The total count of usage requests that have been processed to completion within this year.
- **This Month** – The total count of usage requests that have been processed to completion within this month.
- **Previous Month** – The total count of usage requests that have been processed to completion within the previous month.
- **Pending** – The total count of usage requests that have been submitted and currently awaiting processing.
- **Awaiting Verification** – The total count of usage requests that are awaiting verification of the tenant list.
- **Completed** – The total count of usage requests that have been processed and verified. The usage data is available in the system. This is a running count of all completed requests to date. This number will be equal to or higher than the “Sent to Portfolio Manager” count.
- **Sent to Portfolio Manager** – The total count of usage submissions to ENERGY STAR Portfolio Manager. This is a running count of all submissions to date.

### 2.3 CONTACT US LINKS

At almost any point within the PSEUDT, you have access to PECO’s phone and email contact information via the **Contact Us** links. A **Contact Us** link is provided on the User Authentication page so that you can contact the PECO Energy Usage Data Team before you even log in.

In addition, the **Contact Us** link is accessible at the bottom of the screen throughout the PSEUDT application.
To use the **Contact Us** link:

3. On the **User Authentication** page or at the bottom of any screen once you are logged into the program, click on the **Contact Us** link.

The **Contact Us** page appears providing both phone and email contact details.

4. You can contact the PECO Energy Usage Data Team by calling the support phone number provided or by clicking on the **Email Now** link.

5. The **Email Now** link brings up a new email message addressed to PECO Support in which you can type in your question, request, or comment and click **Send**.

A confirmation message appears with details regarding the timeframe for PECO's response and any further actions that may need to be taken on your part.

### 3 MY PROFILE

From within the **My Profile** page, a user can edit his or her own user profile information and/or change his or her password. To access the **My Profile** page:

1. From within the **Dashboard**, click on the **My Profile** link in the upper right of the screen.

The **My Profile** page appears.
3.1 CHANGING YOUR PASSWORD

To change your password:

1. Click the Change Password button on the upper left.

The Change Password popup appears.

2. Enter the required details and click Submit.
A confirmation message is displayed. An email containing the new password is sent automatically to the email account provided in your user profile.

3.2 EDITING YOUR PROFILE INFORMATION

To edit your profile:

1. Click on the **Edit** button on the upper right of the **My Profile** page.

   ![Edit Button](image)

   The **Edit User** page appears.

2. Make the necessary changes to your profile.

3. Click the **Update** button to save your changes.

   A confirmation message is displayed.

4. Click **OK** to close the popup

   ![Confirmation Popup](image)
4 USAGE DATA REQUEST MANAGEMENT

As Building Manager, within the PSEUDT application, you can make new usage data requests; view, edit and delete recurring or scheduled usage data requests; access and delete usage data requests; access raw usage report details, and verify tenants.

4.1 MAKE A NEW USAGE DATA REQUEST

To make a new Usage Data Request:

1. From the Dashboard,
   - Click on the Create New Request icon at the top of the Request Summary section
   - OR
   - Click on the Request Summary link at the top of the Request Summary section and then click the New Request button on the Request Management page.

The Building Management page appears listing your buildings.

2. Locate the desired building in the table and click the Create Request icon in the Create Request column. (For long lists of buildings, you can use the Search fields or sort by column to find the building you are looking for.

The Make New Request page is displayed.
Note: In order to maintain data accuracy and consistency, a file containing the most up to date available addresses specified in PECO’s internal system is published to the PSEUDT software application on a regular and frequent basis. When you click on the Create Request button, the building address is automatically checked against the most current addresses available in the PECO address file to see if the address is valid.

If there is a discrepancy, a message will appear stating that the primary and/or secondary addresses for that building have “been updated or changed in our system. Address validation is required to apply the updates to this account. To request address validation, please Contact Us at the link provided within the page footer.”

The Usage Request can not be submitted until the address is corrected by an Account Manager or Administrator. Use the Contact Us link at the bottom of the screen to notify PSEUDT Technical Support that action address validation needs to be made.

3. Enter the request information. Your request should have a start date at least 60 days prior to today’s date.

4. (Optional) You can place a request for a scheduled date by selecting the Scheduled Date option and entering the desired date.

Note: To create a recurring request, the Recurring checkbox must be selected. A recurring request should have a start date at least 60 days prior to today’s date. The end date box will be
gray because a recurring request is ongoing. The Auto Confirm checkbox should be selected when entering a recurring request.

5. When finished, click **Submit**.

A confirmation message appears and an email is sent to the requestor when the processing is finished and the data is ready to be viewed.

Please be aware that it may take up to 48 hours to receive the requested usage data before it can be reviewed by PSEUDT. If you do not receive a response within that timeframe, please use the **Contact Us** link at the bottom of the screen to contact the PECO support team.

### 4.2 MANAGE RECURRING OR SCHEDULED USAGE DATA REQUESTS

As a Building Manager, you can view, edit and delete recurring or scheduled usage data requests.

#### 4.2.1 View Recurring or Scheduled Usage Data Request

To view a recurring or scheduled usage data request:

1. From the **Dashboard**, click on the **Request Summary** link in the **Request Summary** section.

The **Request Management** page is displayed.

1. Click the **Show Scheduled Request** button at the bottom of the page.

The bottom of the page expands to display a list of scheduled Usage Data Requests.

2. Click on the numerical hyperlink in the **Scheduling ID** column for the request for which you would like to view the details.
4.2.2 Edit Recurring or Scheduled Usage Data Request

To edit a recurring or scheduled usage data request:

1. From the Dashboard, click on the Request Summary link in the Request Summary section.

The Request Management page appears.

1. Click the Show Scheduled Request button.

The bottom of the page expands to display a list of scheduled Usage Data Requests.

2. Choose the desired request from the list and click on the Edit icon in the Edit column.
3. Make the desired modifications and click the **Update** button to save the changes.

A confirmation message is displayed.

4. Click **OK** to close the message.
4.2.3 Delete Recurring or Scheduled Usage Data Request

To delete a recurring or scheduled usage data request.

1. From the Dashboard, click on the Request Summary link in the Request Summary section.

The Request Management page is displayed.

2. Click the Show Scheduled Request button.

The bottom of the page expands to display a list of scheduled Usage Data Requests.

3. Click on the Delete icon in the Delete column for the request you would like to delete.

The following popup appears.

![Delete Popup](image)

4. Click OK to delete the request

4.3 MANAGE USAGE DATA REQUESTS

As a Building Manager, you can view or delete usage data requests.

4.3.1 View Usage Data Request

To view a usage data request:

1. From the Dashboard, click the Request Summary link.

The Request Management page is displayed.
1. Choose the particular request from the list by clicking on the request’s hyperlink in the Request Id column.

The Request Details page is displayed.

4.3.2 Delete Usage Data Request

A Building Manager may delete Pending requests. However, Pending requests that have already started processing may not be deleted by the Building Manager role.

To delete a usage data request:

1. From the Dashboard, click on the Request Summary link.

The Request Management page is displayed.

2. Choose the particular request from the list and click on the Delete icon in the Delete column.

The following message is displayed:
4.4 VIEW USAGE DATA

After the usage request has been created and processed, the tenants for the building must be verified before the usage data is displayed.

4.4.1 Verify Tenant Lists

Only Building Managers have the ability verify tenant lists. To do this:

1. From the Dashboard, click on the Request Summary link.

The Request Management page appears.

2. Click on the Verify button in the Actions column for the request you would like to verify. (Note: Only requests with statuses of Awaiting Verification will have Verify buttons.)

The Tenant Verification page appears.
3. Select either the Confirm or Deny radio button as appropriate for the tenant in the Confirm/Deny column. *(To confirm all tenants, click the Confirm All button.)*

4. To submit the tenant list and obtain your usage data, click Submit Tenant List button.

A confirmation message appears.

```
Tenant list updated successfully
```

5. Click OK to close the message.

The status changes for the request changes to Complete and the action changes in the Action column.
4.4.2 View Usage Details
To view usage report details:

1. From the Dashboard, click the Request Summary link on the right of the page. The Request Management page is displayed.

2. Click on the View Usage Data button in the Actions column for the desired request. (Note: The View Usage Data button will only be available for requests with Complete statuses.)

The Usage Details page is displayed.

Note: Electric usage only is shown above. For requests containing both electric and gas usage, the data will show in separate columns.
5 ENERGY STAR PORTFOLIO MANAGEMENT

*Portfolio Manager* is the EPA ENERGY STAR application used to enter your building’s energy usage to benchmark your building. With Portfolio Manager, you provide complete details about your building, including energy use, in order to receive your benchmarking score.

Monthly energy usage data for the building is made available through PSEUDT and can be submitted to the ENERGY STAR Portfolio Manager from within the PSEUDT software. The high level steps are as follows, with detailed instructions provided further below:

- Register with ENERGY STAR Portfolio Manager
- Select your Energy Service Provider (PECO) as your contact
- Set up Data Sharing
- Add a property to your account
- Create/share virtual meter(s) for PECO Gas and PECO Electric data
- Link the building data between PSEUDT and Portfolio Manager
- After successfully completing the ENERGY STAR steps, login to PSEUDT, add the request for usage, then submit usage to Portfolio Manager.

5.1 LOGGING IN TO ENERGY STAR PORTFOLIO MANAGER

To log in to ENERGY STAR Portfolio Manager:


2. If you have not already registered, click on the green **Sign Up** button and follow the registration process, otherwise enter your **Username** and **Password**.
5.2 SELECTING YOUR ENERGY SERVICE PROVIDER

Once logged in, you will want to begin the process of sharing your data. To do this:

1. Click on the Contacts link located on the upper right side of the page.

2. Use the Search box to search for your Energy Service Provider. You can search for PECO or any other existing contact you wish to search for.

A list of search results is provided. In the case of PECO, you will find Data Exchange PECO in the list below.

3. Click the Connect button

Click to select the Agreement checkbox to agree to Terms of Use, then click the Send Connection Request button.
You will be directed back to the main page with the following confirmation displayed:

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

5.3 **ADDING A PROPERTY (SKIP TO STEP 5.4 IF PROPERTY ALREADY EXISTS IN PORTFOLIO MANAGER)**

To add a property to Portfolio Manager:

1. Within the **MyPortfolio** tab, click on the **Add a Property** button.

The **Set Up a Property** page appears.

![Set Up a Property page](image)
2. Enter *Basic Property Information* about your property into the fields and click *Continue*.

Next, specify the type of property you are benchmarking.

3. Use the dropdown to select *Your Property’s Primary Function*.

4. Use the radio buttons and/or field in the *Your Company’s Buildings* section to indicate the number of buildings.

5. Indicate *Your Company’s Construction Status* by selecting the appropriate radio button.

6. When finished, click on the *Get Started!* button.

The following screen appears in which you can enter additional information about your building.
7. *(Optional)* Add any additional information regarding the property into the fields provided. *(Note: Please contact the EPA if you are having issues with the details surrounding how to fill these fields out. If you like, skip through and fill this information out later. This information is not required to share your building’s meter data.)*

8. Click the *Add Property* button to create your building.

A *Congratulations* message appears to let you know you have successfully created your property.

### 5.4 CREATING THE VIRTUAL METER(S) (SKIP TO STEP 5.5 IF METER(S) ALREADY EXISTS IN PORTFOLIO MANAGER FOR THIS BUILDING)

*Note: Section applies for PECO Energy Meters only, PECO GAS meters only, or Both*

Next, you will need to create an energy and/or gas meter for the building you are benchmarking. This will be a virtual meter that you can use to report the buildings’ aggregated data. To create your virtual meter:

1. Click on the *Meters* tab.
2. Within the **Meters** tab form, click on the **Add Another Meter** button.

As you click through the boxes below, more selections appear that are associated to your choices.

3. First click to select the **Electric (and/or Natural Gas)** checkbox.

4. Click to select the **purchased from the grid (for electric meter)** checkbox.

5. In the **How Many Meters?** field, specify one **and only one meter** regardless of how many meters are actually physically in the building. *(Remember, the data that we provide up to this meter will be aggregated and at the whole building level.)*

6. Click on the **Get Started!** button:

7. Next, give your meter a name in the **Meter Name** field. The default is **Electric Grid Meter** for electricity and **Natural Gas** for gas.
8. Click on the meter checkbox, use the dropdown to specify **Units** (in kWh for electric and ccf or other appropriate measure for Natural Gas), and use the **Calendar** icon to indicate the **First Bill Date**. *(Below, a first bill date of 1/1/11 is shown, though you may select any date you wish.)*

![Image of meter data table]

### About Your Meters for Test Building 2 Chrome

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 Test Building 2 Chrome (click table to edit)

<table>
<thead>
<tr>
<th></th>
<th>Meter Name</th>
<th>Type</th>
<th>Other Type</th>
<th>Units</th>
<th>Date Meter became Active</th>
<th>In Use?</th>
<th>Date Meter became Inactive</th>
<th>Enter as Delivery?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Natural Gas</td>
<td>Natural Gas</td>
<td></td>
<td>ccf (hundred cubic feet)</td>
<td>1/1/2011</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Electric Grid Meter</td>
<td>Electric - Grid</td>
<td></td>
<td>kWh (thousand Watt-hours)</td>
<td>1/1/2011</td>
<td>✔️</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

9. Click the **Create Meters** button.

A **Congratulations** message appears to let you know you have successfully added your meter(s) to your property.

You will be asked to enter in your energy usage data. **Skip this screen.** Our Data Sharing sends this up automatically. Click **Cancel**. Click **Continue** to arrive back at the building dashboard.

**Note:** You may have one and only one energy meter, and one and only one gas meter, for your whole building usage in Portfolio Manager. If you have existing whole building data in Portfolio Manager, you will authorize that meter but only request data that you have not yet posted.
5.5  SHARING THE PROPERTY

You will now need to share this property in order to get data to ENERGY STAR. To do this:

1. In the Sharing This Property box, click on the Share button.

Here you have a choice to share one property, or many.

2. Choose “One Property”, make sure your property is selected in the next dropdown, then select your data exchange energy service provider. Select Data Exchange PECO.

Next, you will select permission levels for your share request. To do this:

3. Click to select the Personalized Sharing & Exchange Data (“Custom Orders”) radio button, then Continue.
The following window appears. Find your energy meter on the list below, and select the Exchange Data radio button on the same line.

<table>
<thead>
<tr>
<th>Name (ID)</th>
<th>None</th>
<th>Read Only Access</th>
<th>Full Access</th>
<th>Custom Access</th>
<th>Exchange Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Building 2 Chrome (3690136)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Exchange PECCO</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

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.
When the *Exchange Data* radio button is selected, a popup window appears:

Select Exchange Data Access Permissions to [Test Building 2 Chrome](#) for Data Exchange PECO.

Data Exchange PECO 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 Data Exchange PECO.

Please select the permission level you would like to grant Data Exchange PECO for Test Building 2 Chrome for each category. If “None” is selected for all items, Data Exchange PECO will not receive any access to this property.

<table>
<thead>
<tr>
<th>Item</th>
<th>None</th>
<th>Read Only Access</th>
<th>Full Access</th>
<th>Building ID¹</th>
<th>Building Manager ID²</th>
<th>Meter Type ID³</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Information</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electric Grid Meter</td>
<td></td>
<td></td>
<td></td>
<td>4236</td>
<td>860</td>
<td>1</td>
</tr>
<tr>
<td>Natural Gas</td>
<td></td>
<td></td>
<td></td>
<td>4236</td>
<td>860</td>
<td>2</td>
</tr>
</tbody>
</table>

Enter your access permissions for the meter:

5. Select **Full Access** beside *Electric Grid Meter* and enter in your *Building ID*, *Building Manager ID*, and *Meter Type ID* (see section 3.4.6 PSEUDT Linking Data.)

6. Answer with a Yes if you allow Data Exchange PECO to share this property. Additional Options:

<table>
<thead>
<tr>
<th>Item</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share Forward</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. Click on the **Apply Selections & Authorize Connection** button.

The popup window closes.

7. Finally, **Share Property(ies)** by clicking on the **Share Property(ies)** button.

A confirmation message indicates you have successfully edited the sharing permissions.
Within a few minutes, check your property in PSEUDT (navigate to Building Summary and find your building). The ENERGY STAR Authorized checkbox should be checked, and the Stop Submission to ENERGY STAR button should show:

Your building is now linked in ENERGY STAR Portfolio Manager.

You can now enter a recurring usage data request in the PSEUDT. *(Note: In PSEUDT, you should enter a one month request for the month 60 days prior to today’s date, and use the Recurring Request checkboxes as well as the Auto Submit and Auto Verify checkboxes.)*

This request will repeat each month and populate Portfolio Manager with your building data.

*Congratulations! You have completed the linking process for this building, and entered a monthly recurring data request.*
5.6 PSEUDT LINKING DATA

These steps describe the process to obtain three fields in PSEUDT that you will input back into Portfolio Manager. Inputting these fields in Portfolio Manager establishes the link that sets up the relationship between PSEUDT and Portfolio Manager. To do this:

1. Get the **Building Manager ID** and **Building ID**.

2. Find the specific building on the list shown, and click on its hyperlink.

3. You will find the **Building Manager Id** and **Building Id** as shown below.
3. For the Meter Type ID field, to associate this linked meter to an ELECTRIC meter, you will use a code of 1. For a GAS meter, you will use the code of 2.
5.7 SUBMITTING USAGE DATA FROM PSEUDT TO PORTFOLIO MANAGER

This section describes the process that you would use to have your data from PSEUDT sent directly into Portfolio Manager. By performing this step, you avoid having to copy and paste potentially many multiple months or years of energy requests. By requesting your data and then clicking one button, you can send twelve months or more of energy data directly to Portfolio Manager. To do this:

1. Request data for the Building. (*See section 3.3.1 Make a New Usage Data Request in this guide for more on this.*)

   *(Note: When setting up recurring requests, request your old data first, following the process outlined below. Then set up your monthly recurring request (with auto confirm) last.)*

2. Verify the Tenants.

3. Click the **Submit to ENERGY STAR** button.

   *(Note: For your multi-month or yearly usage requests, you will submit the data using the Submit to ENERGY STAR button. When you put in a Recurring Request, you will not have to use the Submit to ENERGY STAR button, because the data will auto-feed into Portfolio Manager on a monthly basis. This is a result of using the Recurring, Auto Confirm and Auto Submission checkboxes.)*
6 SUPPLEMENTARY REPORTS

Additional administrative reports are available on the Dashboard. A list of these reports is shown in the figure below.

1. To download a particular report, click on the corresponding icon. The next page will be displayed.
2. Enter the details.
3. Click the Download button.

The following popup appears:

4. Select the desired option by clicking the appropriate button.

Note: The above steps are applicable for generation of all reports.