PECO Smart Energy Usage Data Tool (PSEUDT)

Energy Star™ Portfolio Manager User Guide

V2.5
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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.

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**.
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.

![Image of My Portfolio Manager screen with Contacts link highlighted.]

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.

![Image of My Contacts screen with search box and search results.]

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

![Image of Search Results screen with Connect button highlighted.]

Click to select the **Agreement** checkbox to agree to **Terms of Use**, then click the **Send Connection Request** button.

![Image of Send Connection Request pop-up with Agree to Terms of Use checkbox selected.]

**Confidential**
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).

3  ADDING A PROPERTY (SKIP TO STEP 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.
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.

### 4 CREATING THE VIRTUAL METER(S) (SKIP TO STEP 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.)*

![About Your Meters for Test Building 2 Chrome](image)

<table>
<thead>
<tr>
<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>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>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 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 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 PECC</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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>&quot;Share Forward&quot;</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allow Data Exchange PECO to share this property with others and give them any permissions that he/she has, including the right to share with more people.</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.*
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.

<table>
<thead>
<tr>
<th>Item</th>
<th>None</th>
<th>Read Only Access</th>
<th>Full Access</th>
<th>Building ID</th>
<th>Building Manager ID</th>
<th>Meter Type ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Meter Information</td>
<td></td>
<td></td>
<td></td>
<td>4236</td>
<td>860</td>
<td>1</td>
</tr>
<tr>
<td>Electric Grid Meter</td>
<td></td>
<td></td>
<td></td>
<td>4236</td>
<td>860</td>
<td>2</td>
</tr>
<tr>
<td>Natural Gas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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).*