Clark Public Utilities
Data Exchange with ENERGY STAR Portfolio Manager
Step by Step Guide

Portfolio Manager (PM) is an interactive, web-based energy management tool that allows you to track and assess energy and water consumption across an entire portfolio of buildings. After creating a Portfolio Manager Account, sharing your property and meter(s), Clark Public Utilities will automatically upload the building's utility consumption and cost data to your account via Portfolio Manager Data Exchange which allows you to benchmark your building's energy performance. Portfolio Manager also allows you to estimate your carbon footprint, assess energy management goals over time, and identify strategic opportunities for savings. If your building falls into one of the categories eligible to receive ratings, you may also earn Energy Star recognition.

It is your responsibility as the customer to provide Clark Public Utilities with all of the account or meter numbers associated with a building. You will submit this information to the utility on the required ***Data Exchange with Portfolio Manager Consumption Request*** Form along with ***Attachment A*** and the utility will provide consumption data for all listed accounts. If you have difficulties identifying all of the accounts in the building, utility assistance may be available.

After you complete the appropriate forms, get started by following this Step by Step Guide.

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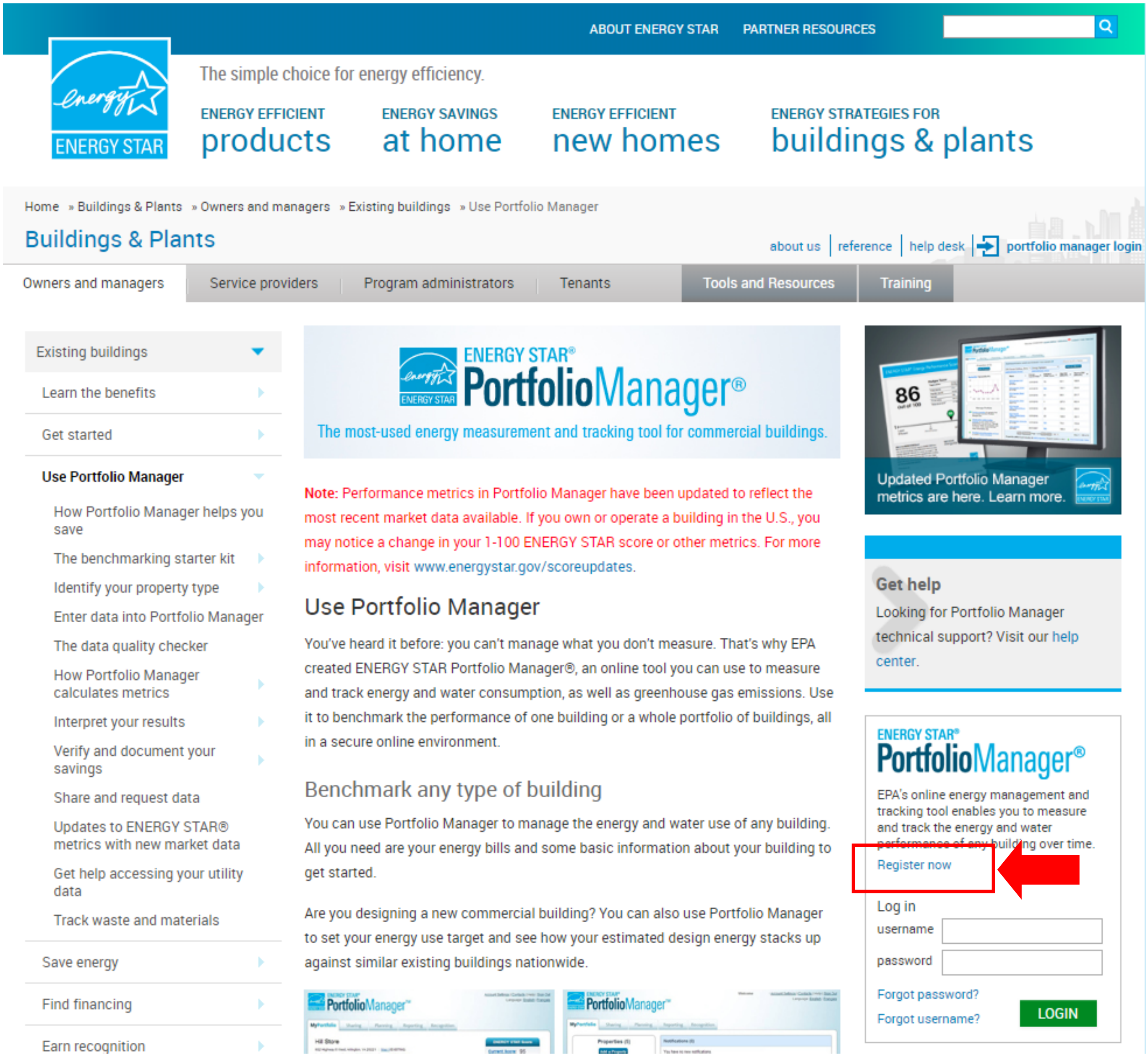
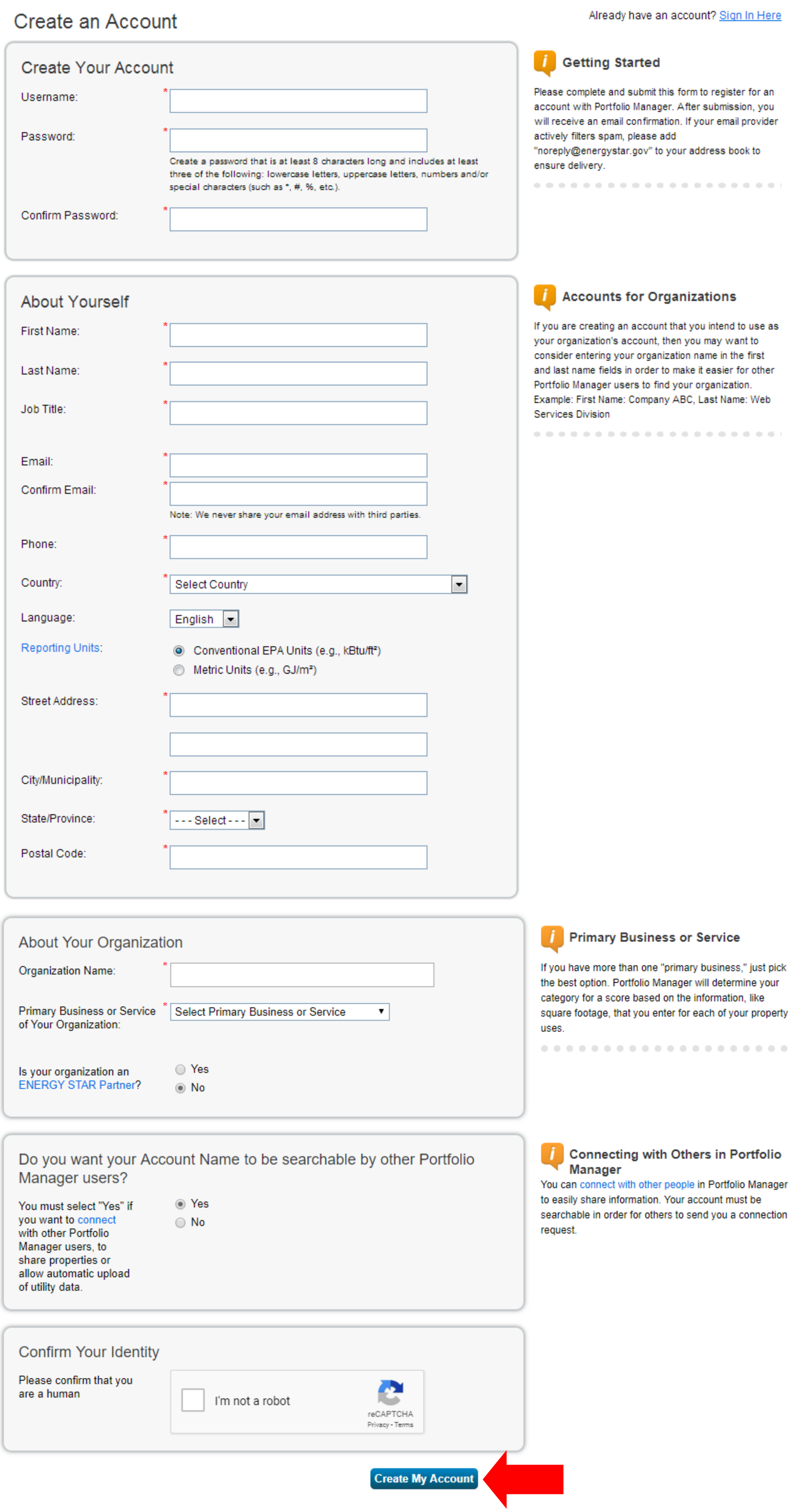
Section 1: How to register a Portfolio Manager account

Step 1.1: Go to Energy Star Portfolio Manager Login page and click on "REGISTER NOW"
http://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager



Step 1.2: Fill out the required information (marked by a red asterisk) and then click on Create My Account. An email will be sent to you with a link to activate your Portfolio Manager Account. This link is only available for 24 hours. Once activated, log into your Portfolio Manager account.



Create an Account

Already have an account? Sign In Here

Create Your Account

Username: *

Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

Confirm Password: *

Getting Started

Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: * Select Country

Language: English

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

Street Address: *

City/Municipality: *

State/Province: * --- Select ---

Postal Code: *

Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

About Your Organization

Organization Name: *

Primary Business or Service of Your Organization: * Select Primary Business or Service

Is your organization an ENERGY STAR Partner? Yes / No

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.

Do you want your Account Name to be searchable by other Portfolio Manager users?

You must select "Yes" if you want to connect with other Portfolio Manager users, to share properties or allow automatic upload of utility data.

Yes / No

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.

Confirm Your Identity

Please confirm that you are a human

I'm not a robot

reCAPTCHA

Privacy - Terms

Create My Account

Section 2: How to create a Property and Meter

Step 2.1:

Add a Property

To get started, log in to Portfolio Manager at www.energystar.gov/portfoliomanager. Then, follow these instructions to create a property and to enter property information.

1. Click **Add a Property** on the **MyPortfolio** tab.
2. Answer questions about your property and click **Get Started!**
3. Enter basic property information and select the boxes next to the statements that apply to your property. Then click **Continue**.
4. Enter Use Details such as Gross Floor Area (GFA), operating hours, and number of workers for each type of use. You can use default or temporary values at this time and enter more accurate data later. **NOTE:** Mouse over the Use Detail to see a definition.
5. Click **Add Property**. When you have successfully added your property, you will see the property's **Summary** tab.

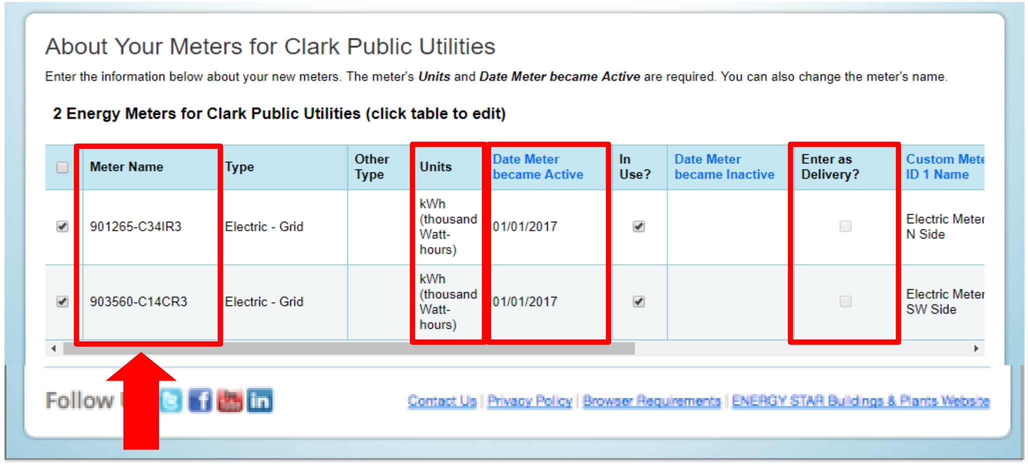
> ***Property Types***
>
> All property types can be benchmarked. For properties with multiple buildings only hospitals, hotels, K-12 schools, multifamily, and senior care communities are eligible to receive the 1 – 100 ENERGY STAR score.

If you have additional types of uses on the property, you can add them at any time.

1. Click the property's **Details** tab, and then select a Property Use Type from the **Add Another Type of Use** drop-down menu. Click **Add**.
2. Enter Use Details for the property and then click **Save Use**.

Step 2.2: You will need to add at least one Energy Meter to the property. This is the meter that Clark Public Utilities will use to provide you with the facility energy use. If there are multiple meters billed on your Clark Public Utilities account or you have more than one tenant occupying the building, you will need to create one meter that will act as the aggregate meter. If you create an aggregate meter, Clark Public Utilities will inactivate your old meter(s) once the new meter data is populated. (Hint: when naming the meter, we suggest using the Clark Public Utilities Account number or meter number if there are multiple meters per account) Notes: The Energy Meter Units will always be "kWh" and please do not check the box for "Enter as Delivery". Disregard step 3.3 in the below process.

Enter Energy, Water, and Waste & Materials Data



About Your Meters for Clark Public Utilities

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 Clark Public Utilities (click table to edit)

	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Mete ID 1 Name
☑	901265-C34IR3	Electric - Grid		kWh (thousand Watt-hours)	01/01/2017	☑		☐	Electric Meter N Side
☑	903560-C14CR3	Electric - Grid		kWh (thousand Watt-hours)	01/01/2017	☑		☐	Electric Meter SW Side

To receive the most accurate picture of your building's performance, tell Portfolio Manager how much energy and water your building consumes, and the volume of waste and materials that you generate. Follow these steps to enter energy, water, and waste data for your property.

1. Click on your property from the **MyPortfolio** tab, then select either the **Energy, Water,** or **Waste & Materials** tab.
2. Click **Add A Meter**.
3. If you create an energy or water meter:
   i. Select the type of energy or water used and the number of meters to create, and click **Get Started!**
   ii. Click on a meter to enter units and first bill date. If this meter reflects a bulk fuel purchase for an energy meter, select the **Enter as Delivery?** checkbox.
   iii. Click the blue arrow next to each meter to expand the section on the **Your Meter Entries** page. Click **Add Another Entry** under the meter and enter data. Check **Estimation** if you are not including measured data for the entry. You may also choose to record cost here, too. Once you're finished adding entries, click **Continue**.

   Please skip Step 3.3. We will enter this data.

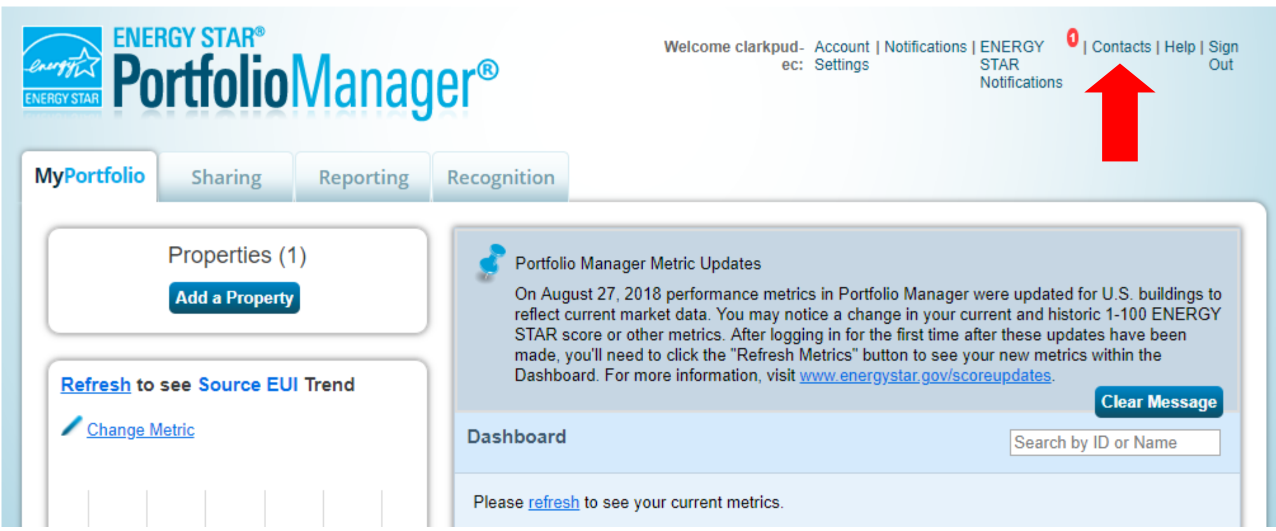
   iv. Select the boxes of the meters that total your property's energy or water use on the **Select Meters to Include in Metrics** page. Click **Apply Selections**.
4. If you create a waste meter:
   i. Select the waste you are tracking and indicate what you do with it. Click **Continue.**
   ii. Indicate how often the material is being collected (regular or intermittent), the units used for tracking, and if prompted, the date you first started tracking. Click **Create Meter(s).**
   iii. Click the blue arrow next to each meter to expand the section on the **Your Meter Entries** page. Click **Add Another Entry** under the meter and enter data. Check **Estimation** if you are not including measured data for the entry. You may also choose to record cost and disposal destination here, too. Once you're finished adding entries, click **Continue**.
   iv. Select the boxes of the meters that total your property's waste and materials on the **Select Meters to Include in Metrics** page. Click **Apply Selections**.

Section 3: How to connect to Clark Public Utilities

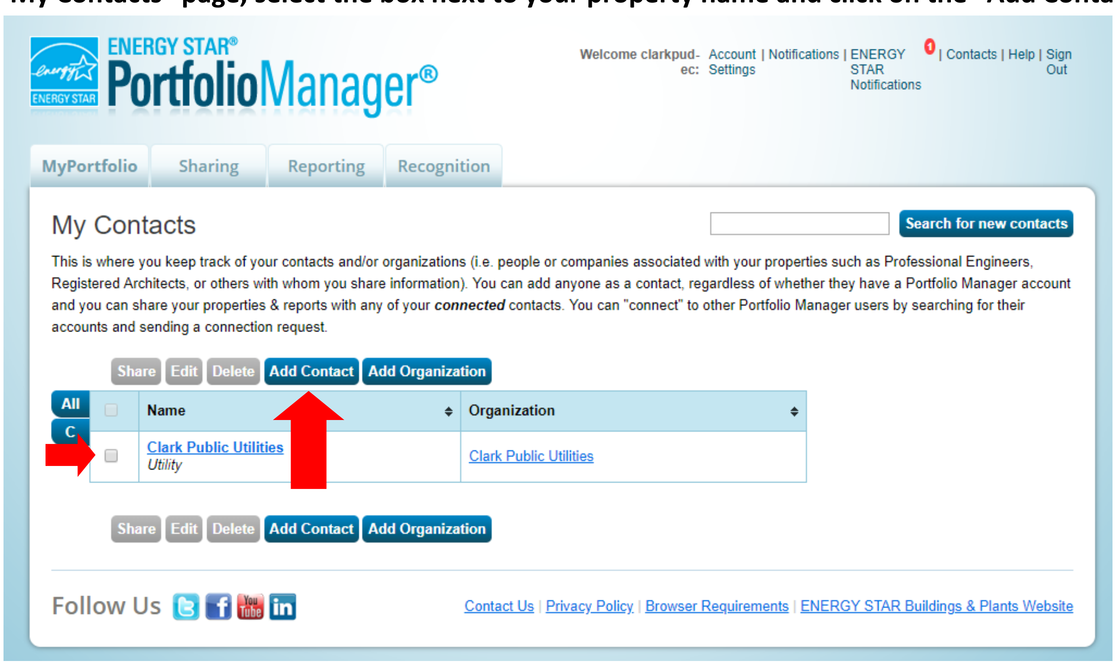
Step 3.1: Complete the [Data Exchange with Portfolio Manager Consumption Request](#) Form as well as [Attachment A](#) and return them to Clark Public Utilities at pmdataexchange@clarkpud.com. This entails collecting ALL account numbers, meter numbers and meter names as they appear in Portfolio Manager (meter names you just entered in the step above) for the buildings you wish to benchmark. If there is only one tenant in the building, you will need that tenant's signature in order for Clark Public Utilities to release energy data.

Step 3.2: Connect with Clark Public Utilities
Send a connection request to Clark Public Utilities in Portfolio Manager (see below) in Portfolio Manager. Note: Clark Public Utilities will not accept the connection request until the appropriate forms have been received with complete data.

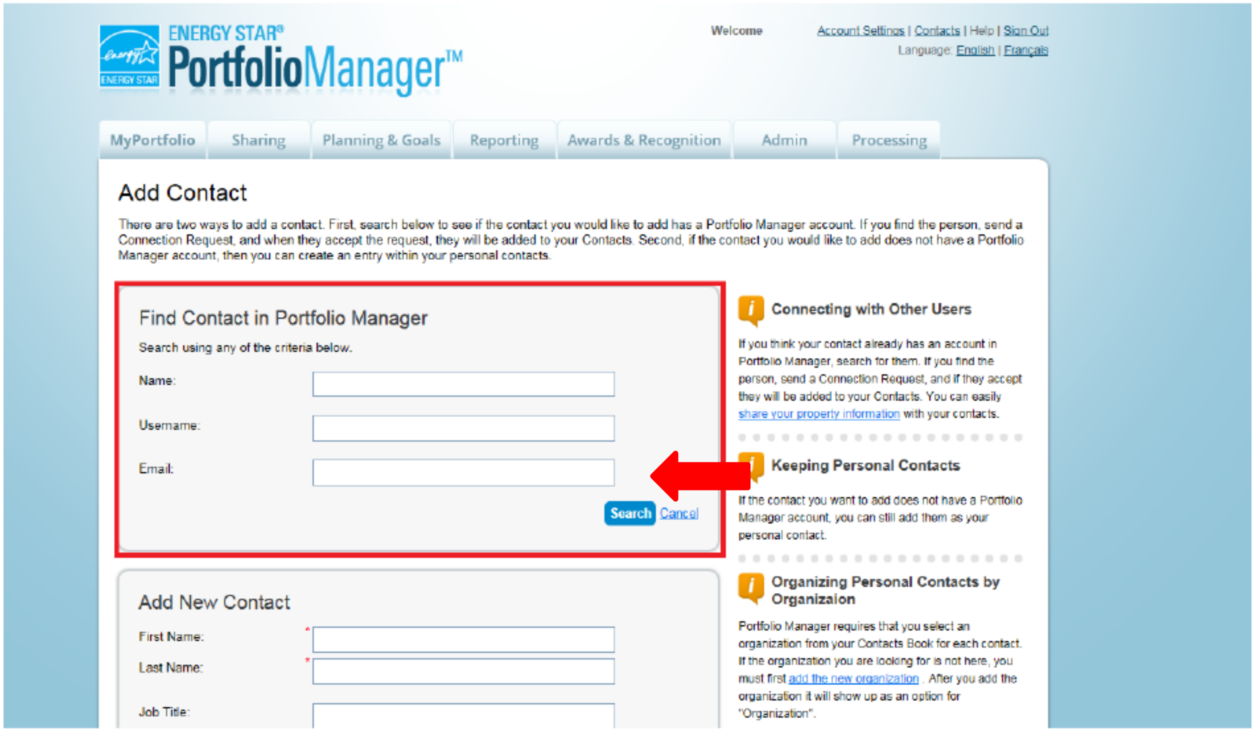
Log in to Portfolio Manager and click on the "Contacts" link in the upper right-hand corner.



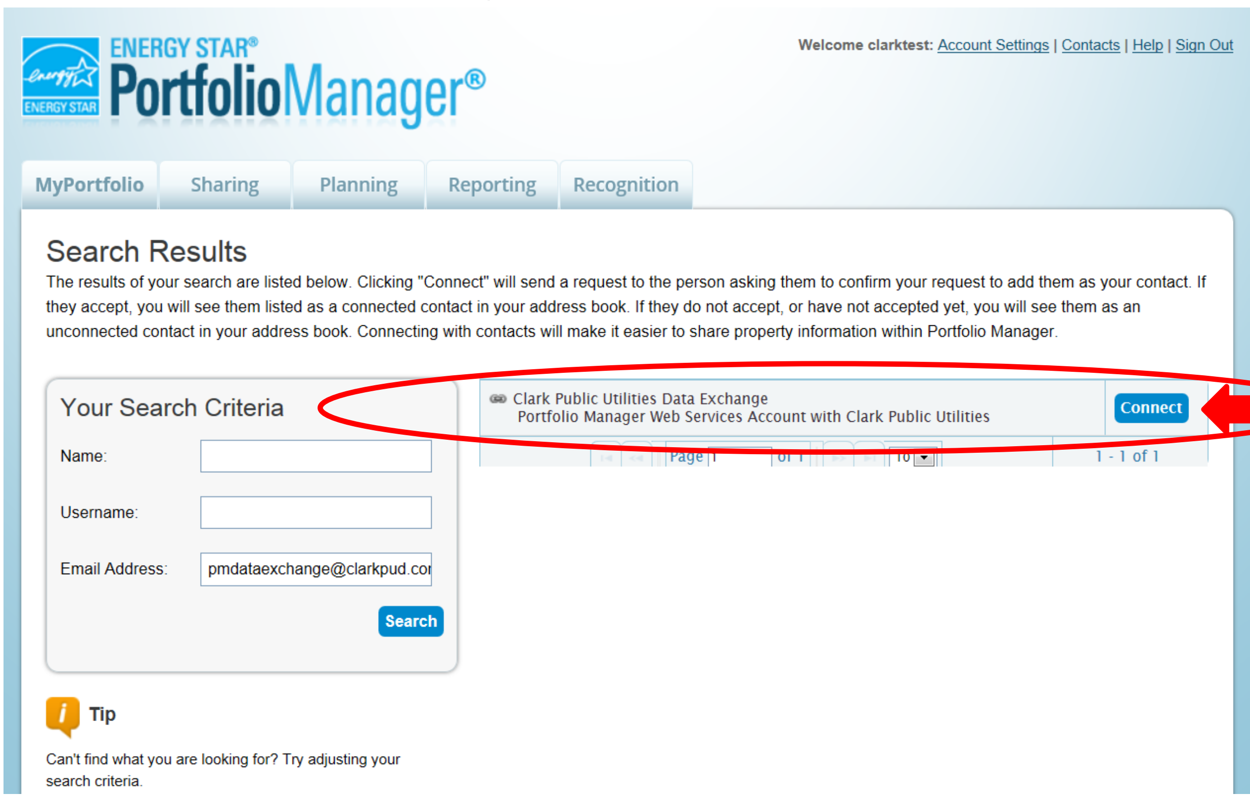
On the "My Contacts" page, select the box next to your property name and click on the "Add Contact" button.



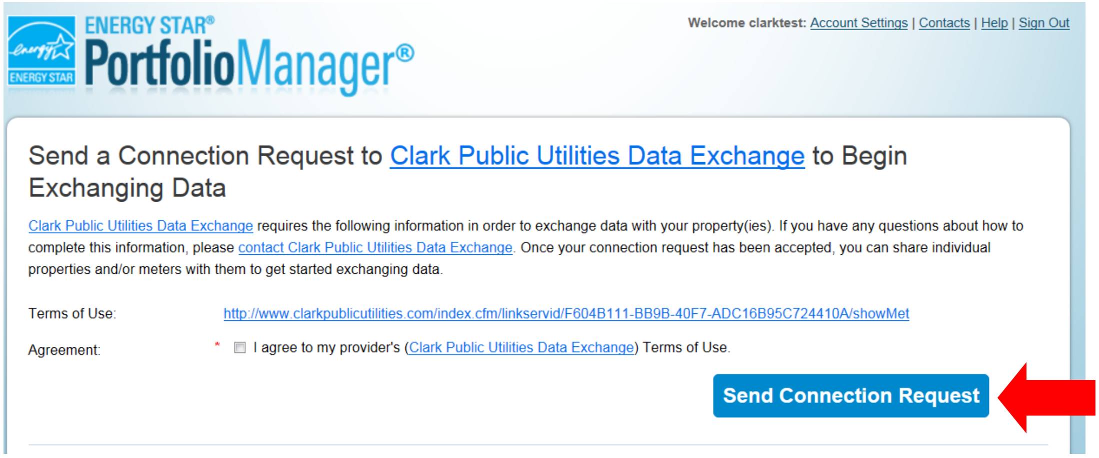
On the “Add Contact” page, search for our Email pmdataexchange@clarkpud.com and click “Search”.



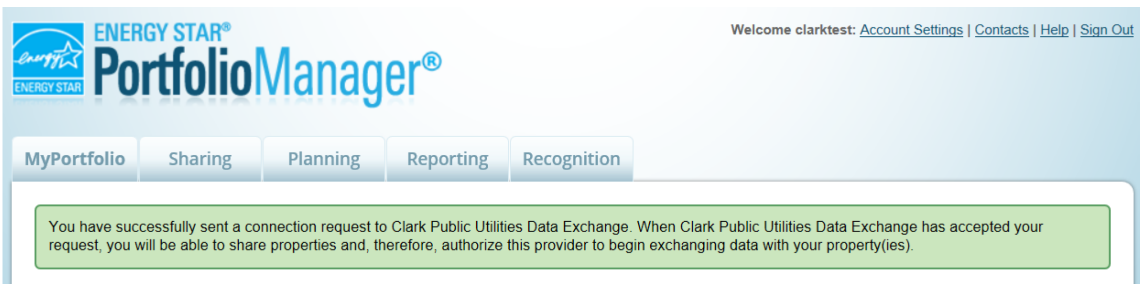
You will find “Clark Public Utilities Data Exchange” in the search results and click on the “Connect” button.



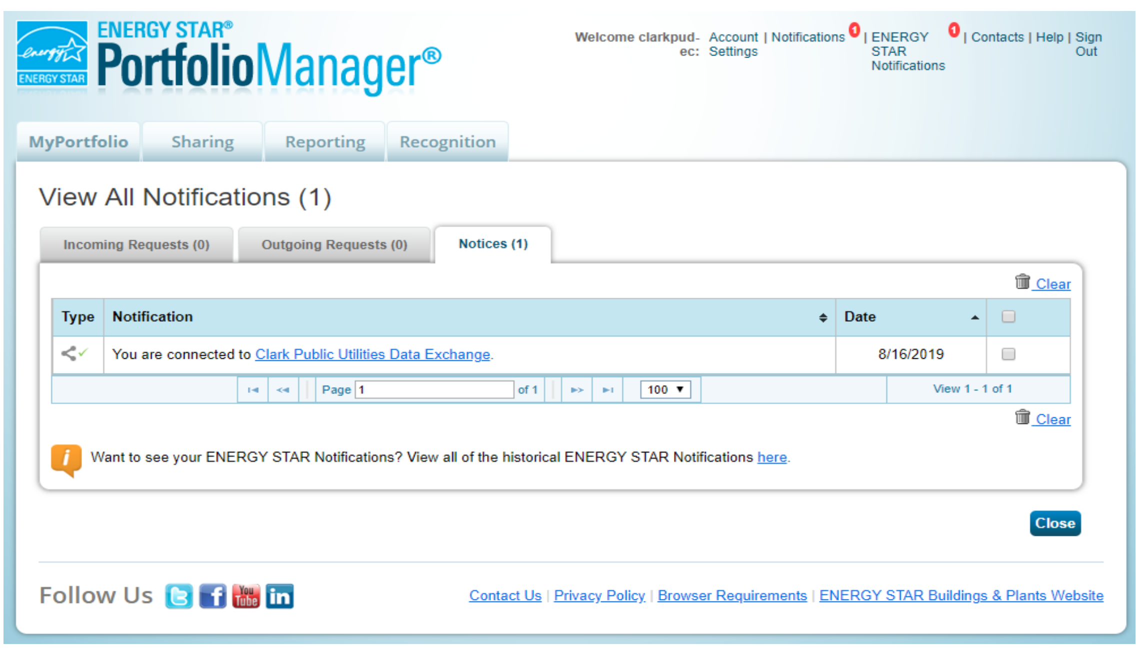
Next you will be prompted to agree to our Terms of Use. If you agree with our terms, please check the box and then click "Send Connection Request".



Upon completion, you will see a dialog box confirming that the connection request has been sent.

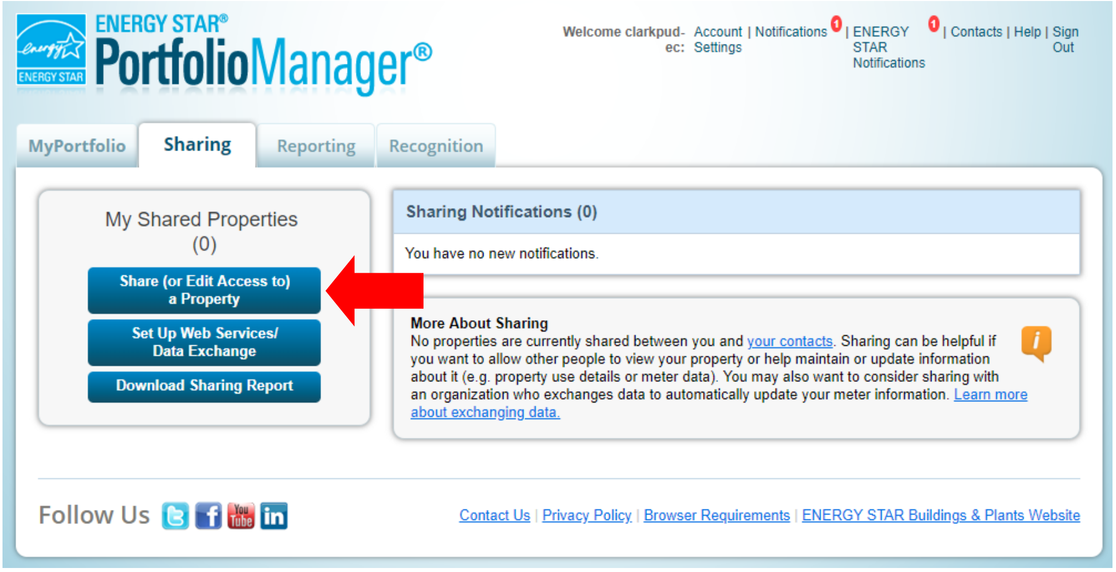


Step 3.3: Clark Public Utilities accepts your connection request.
You will be notified that the connection request has been accepted via a message that will appear in the "Notifications" section of the main screen of Portfolio Manager the next time you login. Also, the originator of the request will receive an email back from the Clark Public Utilities Data Exchange Team notifying them that the connection request has been accepted. Note: you cannot move on to Section 4 until your connection request has been accepted.

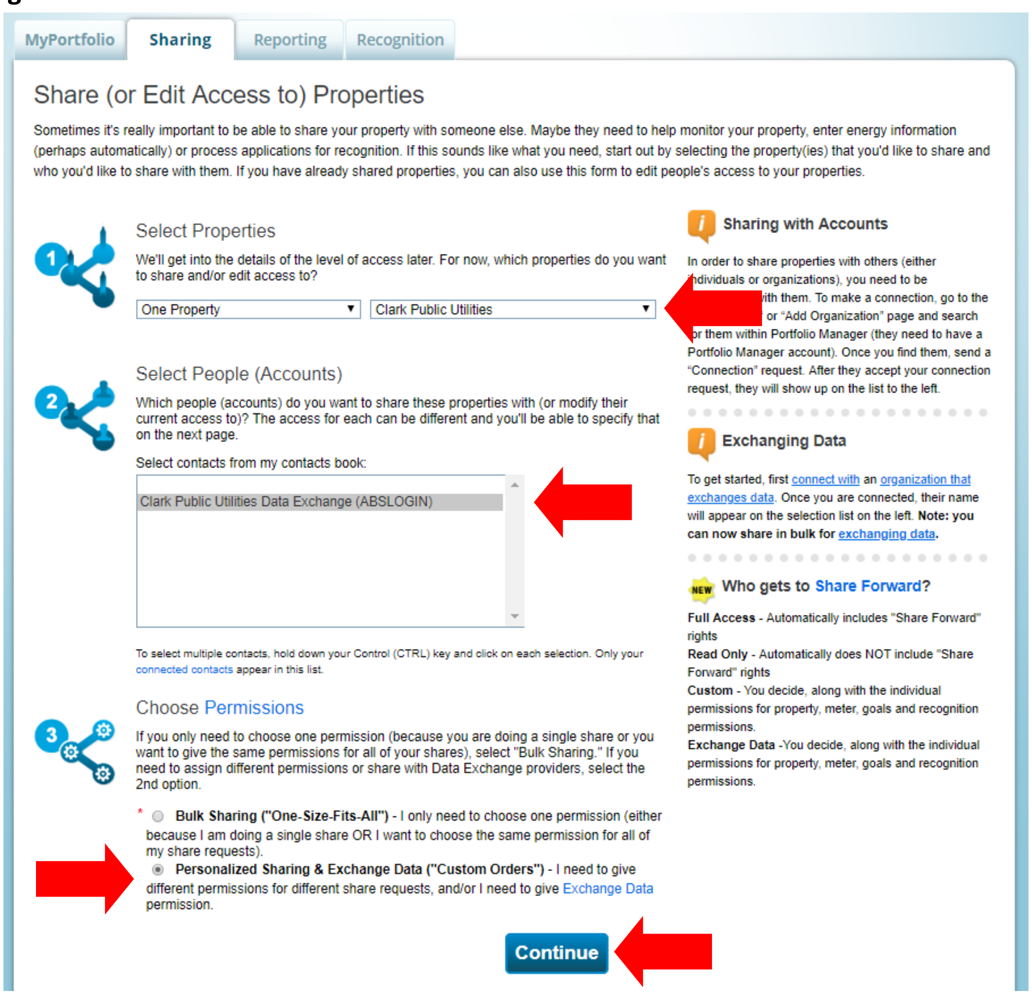


Section 4: How to share your properties/meters with Clark Public Utilities

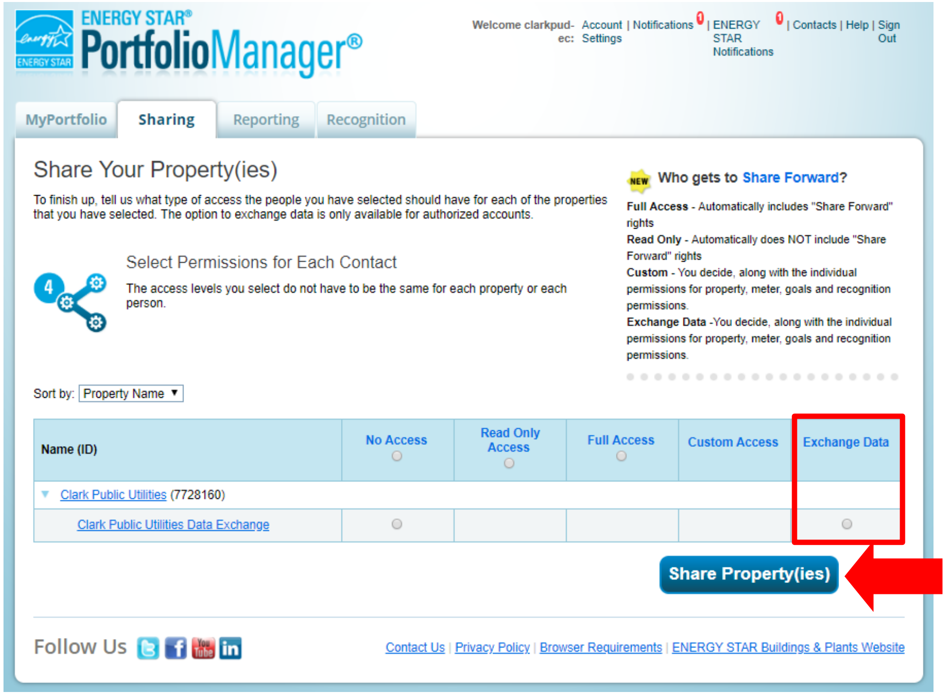
Step 4.1: Log into Portfolio Manager, click on the “Sharing” tab and click “Share a Property.”



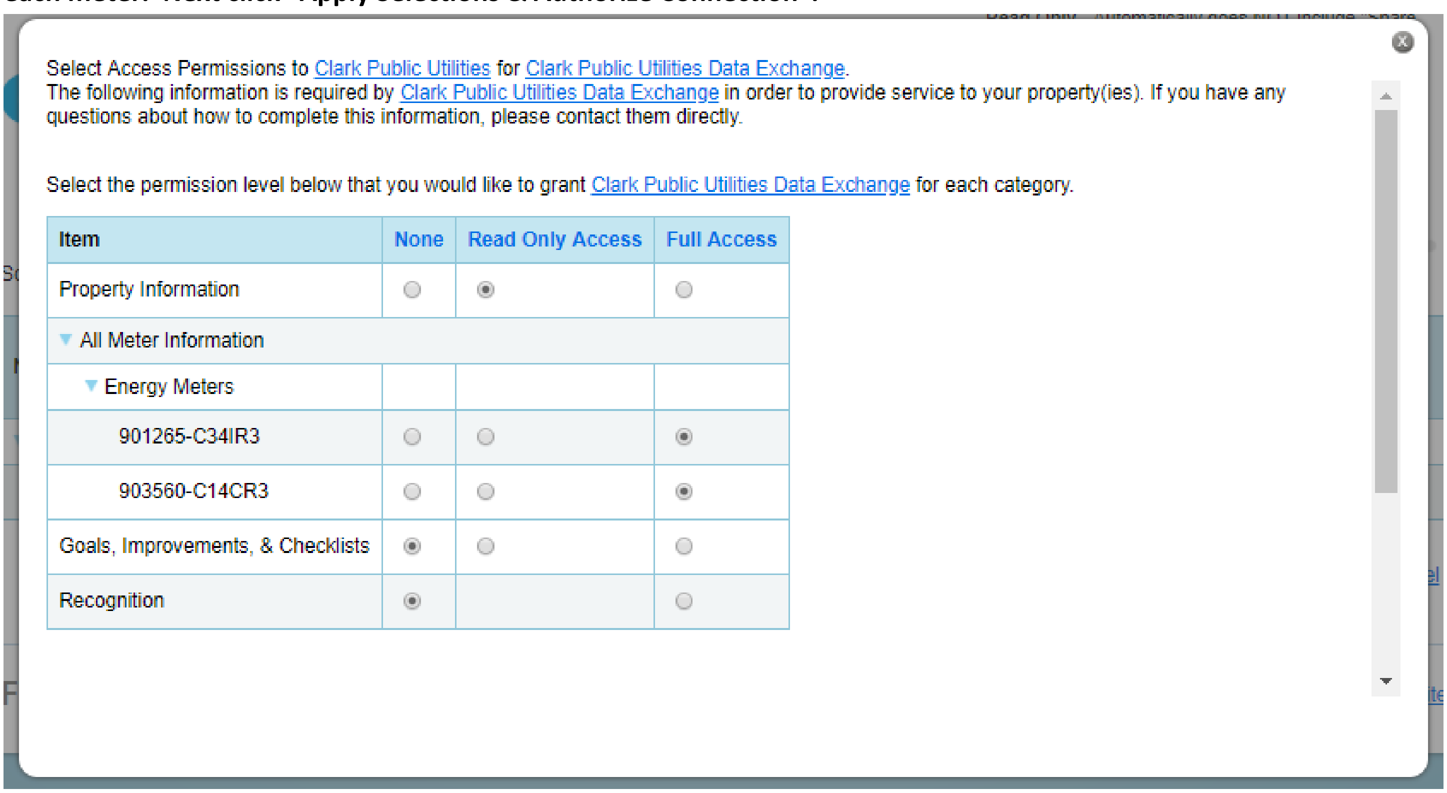
Step 4.2: On the “Share Properties” screen, select the Property(ies) that you wish to share and select “Clark Public Utilities Data Exchange (ABSLOGIN)” from the dropdown list in number two. Under Permissions, choose “Personalized Sharing & Exchange Data”. Then click “Continue.”



Step 4.3: The selected properties will now appear on a permissions selection screen. You will need to grant a level of sharing access by clicking on the radio button for "Exchange Data."



Step 4.4: A dialog box will appear that will allow you to select the permission level for the data exchange. Please select the "Read Only Access" radio button for the "Property Information" and "Full Access" radio button for each meter. In order for Clark Public Utilities to exchange data with Portfolio Manager we must be granted "Full Access" to each meter. Next click "Apply Selections & Authorize Connection".



Then select "Share Property(ies).

Step 4.5: Please reply to the email from the Clark Public Utilities Data Exchange Team that you have completed this step to share your Property(ies) and Meter(s).

Step 4.6: Clark Public Utilities accepts the share request(s) and within 10 business days we will automatically upload the last 12 months of meter consumption (up to 36 months can be requested) and cost data into your account. The Clark Public Utilities Data Exchange Team will email you once the upload is complete.

<u>Section 5: How to exchange data with Portfolio Manager when you have an existing Portfolio Manager account</u>
This section is for existing Portfolio Manager Customers who have been manually entering meter data for one or more meters and would like to begin using Clark Public Utilities' data exchange.

Step 5.1a: If you have <u>only one meter</u> associated with your electric account, this meter will now become the meter that Clark will use to automatically upload data into your account. Login to your existing Portfolio Manager account and follow the steps in Sections 3 and 4.

Step 5.1b: If you have <u>more than one meter</u> associated with your electric account or there is more than one tenant in your building, follow <u>Step 2.2</u> to create an aggregate meter which Clark will use moving forward. If you create an aggregate meter, Clark Public Utilities will inactivate your old meter(s) once the new meter data is populated. Login to your existing Portfolio Manager account and follow the steps in Sections 3 and 4.

<u>Section 6: Frequently Asked Questions</u>
When do I need to create an aggregate meter in Portfolio Manager?
If there are multiple meters billed on your Clark Public Utilities account or you have more than one tenant occupying the building, you will need to create one meter that will act as the aggregate meter.

What buildings are eligible for benchmarking and receiving the ENERGY STAR label?
Refer to the ENERGY STAR website for building eligibility: https://www.energystar.gov/buildings

Why doesn't my building have an ENERGY STAR rating?
There are many reasons why your facility may not have a rating. Verify your information with the data quality checker. Once you've entered your data, Portfolio Manager has a handy tool to help you check for errors and anomalies. From the Summary Tab of each property, you can run a simple report to compare your data with typical values. This will help you identify energy values and property use details that are unusual given your building's use. It'll also help you identify possible typos, incorrect meter readings, missing information, incorrect units of measure, and other common data entry problems.

How often will my data be automatically uploaded?
Clark Public Utilities automatically uploads meter data by the fifth business day of the following months:

- January
- April
- July
- October

What information is included in the data exchange upload?
Electric meter consumption data will be entered in kWh (kilowatt-hours) but will not include kW (demand) or power factor penalties. Water meter consumption data (if applicable) will be entered in cubic feet. Cost data will not include basic service charges, taxes or Green Lights charges.

How do I ensure all of the energy usage for my building is captured in the aggregate meter data?
It is your responsibility as the customer to provide Clark Public Utilities with all of the account or meter numbers associated with a building. You will submit this information to the utility on the required ***Data Exchange with Portfolio Manager Consumption Request Form*** along with ***Attachment A*** and the utility will provide aggregate data for all listed accounts. If you have difficulties identifying all of the accounts in the building, the utility assistance may be available.

Who do I contact with questions?
For questions related to ENERGY STAR Portfolio Manager, make sure to check their FAQ and Help, which can be accessed from the link at the top right corner of any screen in Portfolio Manager. For additional assistance, contact buildings@energystar.gov.

For additional technical assistance from the Clark Public Utilities Data Exchange Team, contact pmdataexchange@clarkpud.com.