HOW TO BENCHMARK
YOUR BUILDING

Instructions for Using ENERGY STAR® Portfolio Manager
and PG&E’s Automated Benchmarking Service

This document is a quick start guide for enrolling in Pacific Gas and Electric Company’s (PG&E) Automated Benchmarking Service (ABS). For additional help, we suggest you refer to resources on the ENERGY STAR benchmarking website at www.energystar.gov/benchmark and PG&E’s benchmarking website at www.pge.com/benchmarking.

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. By uploading meter data automatically to your Portfolio Manager account, ABS makes it easier to use this tool.

This guide will walk you through of the process of benchmarking your building – showing you how to register a Portfolio Manager account, create a profile of your facility, and enroll in the ABS. The troubleshooting section can help you identify and correct problems you encounter with ABS authorizations. Finally, you can find detailed answers to 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 at www.pge.com/benchmarking.

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1. How To Register a Portfolio Manager Account

1.1 Go to the ENERGY STAR Portfolio Manager Login page at www.energystar.gov/istar/pmpam/ and click on “Register”:

1.2 Fill out the required information (marked with a red asterisk). Note that the username and password should not contain any special characters or spaces. An email will be sent to you with your login information after you save your profile.

1.3 Log in to your new Portfolio Manager account at www.energystar.gov/istar/pmpam (shown above in Step 1.1) and click on “Access My Portfolio” to go to the “My Portfolio” page. Once you have added your facilities, the “My Portfolio” page will display them and their average performance. A sample facility will already be there for you to look at.
2. How To Create A Facility Profile

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

Adding Facilities to Your Portfolio

2.1 Add facility by clicking on “Add a Property” in the “My Portfolio” page:

2.2 Select the property type that best describes your facility:

2.3 Enter the name, address, and other general information about the facility. Make sure that the city name is accurate and spelled correctly:
2.4 After saving the information, you will be taken to the “Facility Summary” page:
Adding Spaces to Your Facility

Portfolio Manager uses “space types” to characterize a building for benchmarking. Your building may have one or more space types. For example, an office building might have occupied office space, vacant office space, a computer data center, and parking. Each of these should be entered as a different “space” and will require different information. Links to more information on how these space types are defined can be found at www.pge.com/benchmarking.

2.5 To add a space to your facility, click on “Add Space” in the Space Use section of the “Facility Summary” page:

![Image of Portfolio Manager interface with Add Space button highlighted]

2.6 Enter a name, select the appropriate space type, and enter the date of construction:

![Image of Portfolio Manager interface with space creation form]

2.7 On the next page, you will be asked to enter basic information to characterize the facility. The type of information required depends on what kind of space you are entering. The
“Gross Floor Area” attribute is required; however, if you have not yet collected all of the other information you can check the box in the “Use Default Value” column to substitute temporary values that are typical of this kind of space:

2.8 After saving, you will return to the “Facility Summary” page. If needed, add more spaces by repeating steps 2.5 through 2.7. Make sure to split up the gross floor area so that the sum of all the spaces does not exceed the total gross floor area of the facility.

Tip: To find out more details on what the space attributes mean, go to the “HELP” icon at the top right of the screen, click on “My Portfolio”, then “Managing Space Information”, then “Space Use Information”, and finally select the type of space that you are entering. This will give you the definition of the space, what each attribute means, the default values, and any relevant frequently asked questions.
Adding Meters to Your Facility Profile

You will need to add a meter to your facility profile for each meter in the building. For PG&E meters that you are signing up for ABS, you should add one meter per Service ID. Refer to the FAQ in this document if you do not know where to find the Service ID numbers on your PG&E bill.

2.9 From the “Facility Summary” page, click on “Add Meter” in the Energy Meters section:

2.10 Fill out the required information about the meter. It may be useful to name the meter with your Service ID number, but make sure not to include any special characters in the meter name. For PG&E meters, the unit of electricity is kWh, and the unit of natural gas is therms:
2.11 After saving, you will be brought to a page where you can add meter entries. Since you are signing up for Automated Benchmarking, click on "DO NOT ADD METER ENTRIES":

2.12 After saving, you will return to the “Facility Summary” page. To add more meters, repeat steps 2.9 through 2.11. Make sure to include meters for all energy used in the building, including on-site solar and wind generation.

(Note: If you need to make manual entries for meters that are not PG&E meters, then in step 2.11 enter the start date for all of the meter data you have collected, click "CONTINUE", and enter monthly usage and cost.)

2.13 When you have completed adding all of the spaces and meters for the facility, click on “My Portfolio” at the top left corner of the screen underneath the ENERGY STAR symbol:
3. How To Enroll in Automated Benchmarking Services

Before enrolling in PG&E’s Automated Benchmarking Service (ABS), make sure that:

• All of the meters have been added to the facility record
• You have collected the Service ID number for each meter
• The city name is spelled correctly in the address for each building
• Any manually entered data in a meter has been deleted (ABS will not overwrite any data that you have entered)

3.1 From the “My Portfolio” page, click on “Get Started Now” underneath the heading “Automated Benchmarking”:

3.2 This takes you to the Automated Benchmarking Service Console. Select “Pacific Gas and Electric Company” from the dropdown list under “Option 1: Select Your Current Provider” and click “ADD”:
3.3 Read and agree to the "Terms of Use":

3.4 Select the level of access that says "Add new buildings and update existing buildings in my portfolio":

3.5 Check off all buildings and meters you wish to authorize:
3.6 Enter your email address and the Service ID number for each meter:

3.7 After continuing, you will be returned to the ABS Console. Within 1-2 business days, you should receive an email from benchmarking@pge.com notifying you that your automated benchmarking authorization has been processed. Monthly updates will occur after the 15th of each calendar month. You can return to the ABS Console at any time to view pending authorizations, check for error messages, change authorizations, and link to the PG&E benchmarking email and website:
4. Troubleshooting

If you have authorized meters for the Automated Benchmarking Service and are not receiving data after 2 business days, please follow these steps:

4.1 Make sure that you have the correct and most current Service ID number for each meter. The Service ID number is different from the Meter ID and the Account ID. To see where the Service ID is on your bill, refer to the Frequently Asked Questions on page 14 of this document.

4.2 Make sure that the city name in the building address is correct and spelled out. For example, instead of writing "SF", spell out "San Francisco". If this is not entered properly, fix any error before re-authorizing the meter. To check and edit the city name, go to the "Facility Profile" page (if you are in the "My Portfolio Page", do this by clicking on the name of the facility). Click on "Edit" next to "General Facility Information":

![Facility Profile Image]

4.3 From the "My Portfolio" page, go to the Automated Benchmarking Services Console by clicking on "Automated Benchmarking Services Console":

![Automated Benchmarking Services Console Image]
4.4 Scroll down and click on “Change Authorization”:

4.5 Select all of the meters and buildings that need to be authorized [do not un-check any boxes that are already checked off] and click “CONTINUE”:

4.6 Enter the correct Service ID number for each meter and click “CONTINUE”:

4.7 If your reauthorization was successful, your meter data will be loaded into your account within 1-2 business days. If, after 2 business days, you are still not receiving data, please send an email to benchmarking@pge.com and make sure to include the building name[s] and Service ID[s] that you are experiencing problems with.
5. Frequently Asked Questions

Where can I find the Service ID numbers for my meters?

Each meter has a Service ID, which is a ten-digit number (it is not your Account Number or the Meter ID). You can find the Service ID for each meter under “GAS SERVICE CHARGES” or “ELECTRIC SERVICE CHARGES” on your bill:

![Service ID on a PG&E bill]

How long will it take for my Portfolio Manager account to receive meter data after I sign up for the Automated Benchmarking Service?

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

Monthly meter updates are uploaded to Portfolio Manager after the 15th of each month. Because this only occurs once a month, you may see a lag time between receiving your monthly PG&E bill and seeing the new data in Portfolio Manager. If your meter data has stopped updating, please contact benchmarking@pge.com.

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

To receive a valid score you will need to obtain energy use data for all of the meters in your buildings.

Use the Data Release Authorization for Benchmarking Analysis to obtain the Service ID numbers for each meter. (Make sure that both sides are filled out.) This form can be found at http://www.pge.com/includes/docs/pdfs/mybusiness/energysavingsrebates/analyzer/benchmarking/09%20Non%20RCx%20DRABA%20form.pdf

Once you have the Service IDs, you can sign up the meters for Automated Benchmarking in Portfolio Manager exactly as described in Section 3 on page 9 of this document.

How much historical meter data will I get when I sign up for Automated Benchmarking?
In general, ABS will populate your meters with data dating going back as far as 2003. If the account has changed, then the data will only go back as far as it has been assigned to the current Account ID.

**Why doesn’t my building have an ENERGY STAR rating?**

There are many reasons why your facility may not have a rating. The best way to find out is to click on the link that says “N/A” next to the facility name where the score would otherwise appear:

![Sample Facility](image)

For detailed explanations of the reasons you received for not getting a rating, refer to the Portfolio Manager help: [www.energystar.gov/istar/pmpam/help/Warning_Messages.htm](http://www.energystar.gov/istar/pmpam/help/Warning_Messages.htm)

**What buildings are eligible for benchmarking and receiving the ENERGY STAR label?**

Refer to the ENERGY STAR website for what buildings are eligible to receive a rating at [www.energystar.gov/index.cfm?c=eligibility.bus_portfoliomanager_eligibility](http://www.energystar.gov/index.cfm?c=eligibility.bus_portfoliomanager_eligibility)

**How can I improve my ENERGY STAR score?**

PG&E wants to help you improve your score! To find out more about our many programs that can help you save energy and money, check out [www.pge.com/biz](http://www.pge.com/biz) or call our Business Customer Service Center at **1-800-468-4743**. Energy audits and cash incentives for new equipment are just some of the many services we offer.

**Where can I get more help?**

For questions related to ENERGY STAR Portfolio Manager, 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](mailto:buildings@energystar.gov). If you have questions or need additional assistance with PG&E’s Automated Benchmarking Service, email [benchmarking@pge.com](mailto:bENCHMARKING@PGE.COM).