How to Benchmark Your Building

Instructions for Using ENERGY STAR® Portfolio Manager and PG&E's Web Services

PG&E®

November 2013

This document is a quick-start guide for enrolling in Pacific Gas and Electric Company's (PG&E) Web Services. For additional help, we suggest you refer to resources on the Portfolio Manager Overview, PG&E's Benchmarking Web site, and Portfolio Manager Online Help Web site.

OVERVIEW

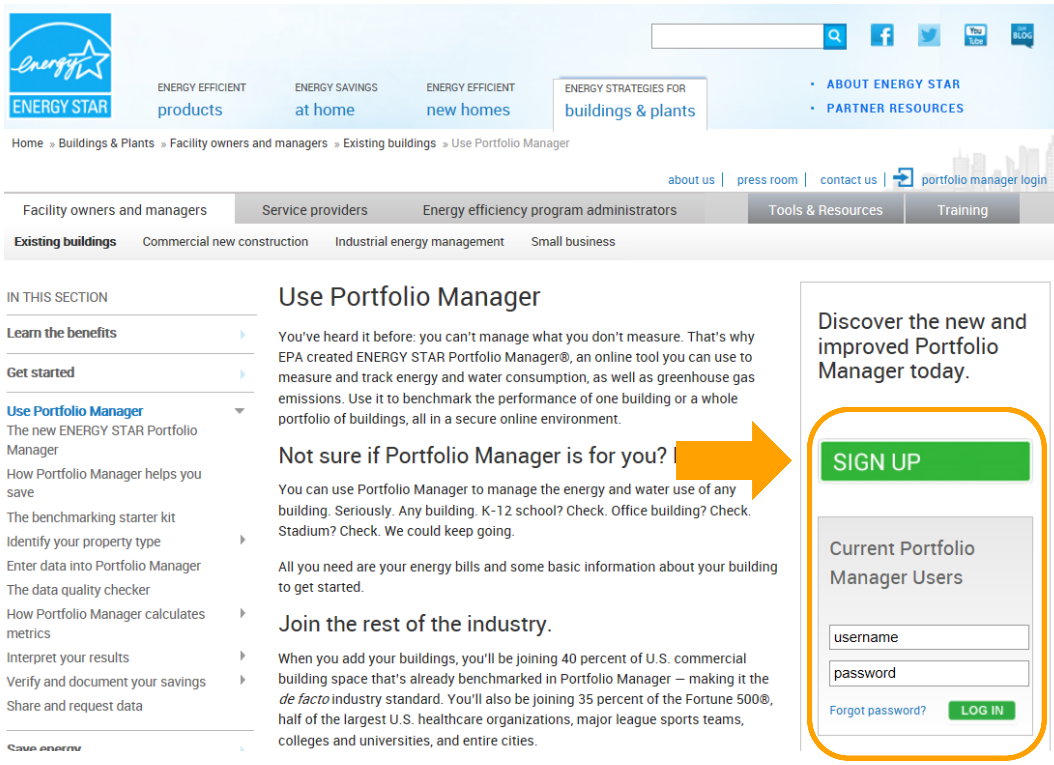
ENERGY STAR® Portfolio Manager, an online service created by the Environmental Protection Agency (EPA), allows you to track the energy consumption of your facilities and compare them to similar buildings nationwide. Web Services makes it easier to use this tool by uploading meter data automatically to your Portfolio Manager account.

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

TABLE OF CONTENTS

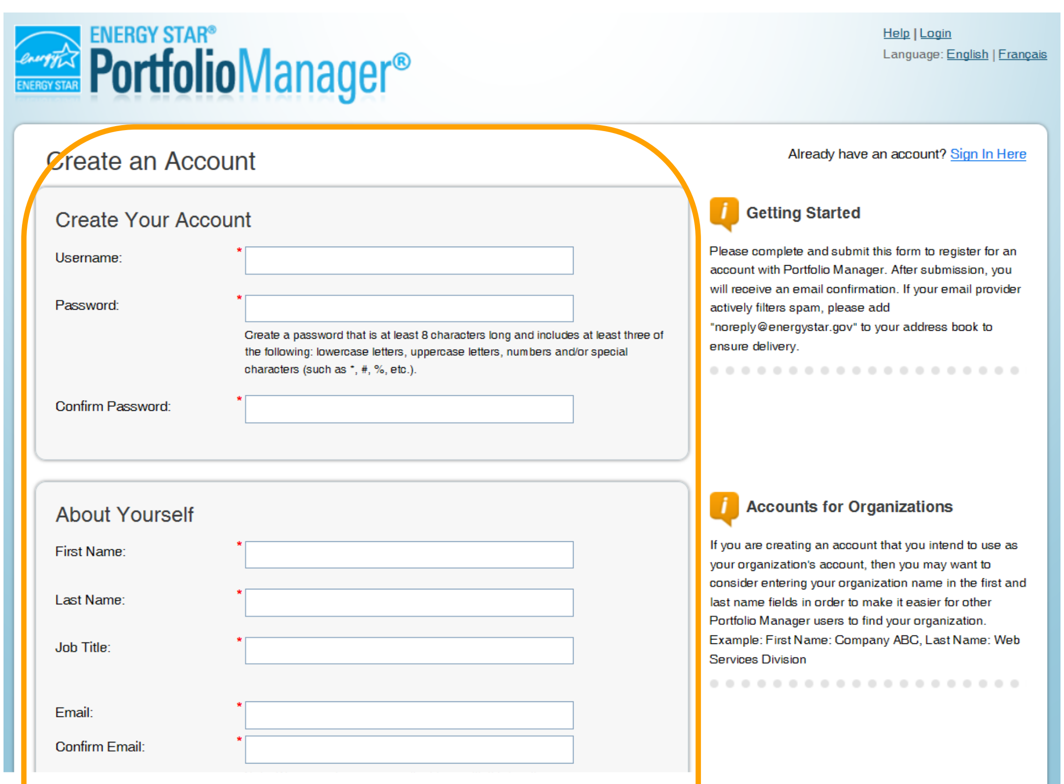
SECTION 1 | How to Register a Portfolio Manager Account

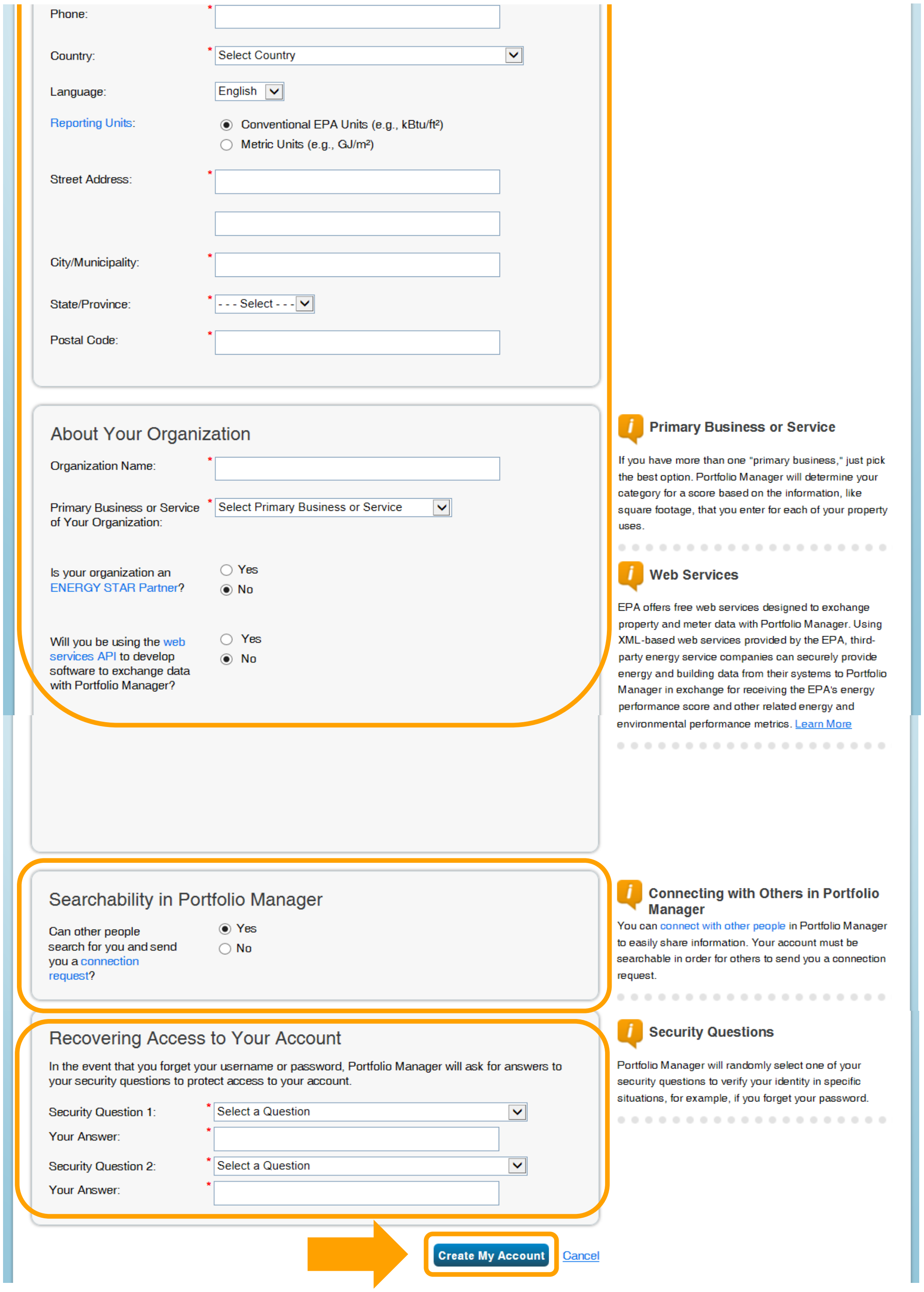
1.1 Go to the ENERGY STAR® Portfolio Manager Login page (www.energystar.gov/portfoliomanager) and click **Sign Up**. If you already have a User Name and Password, enter it below.



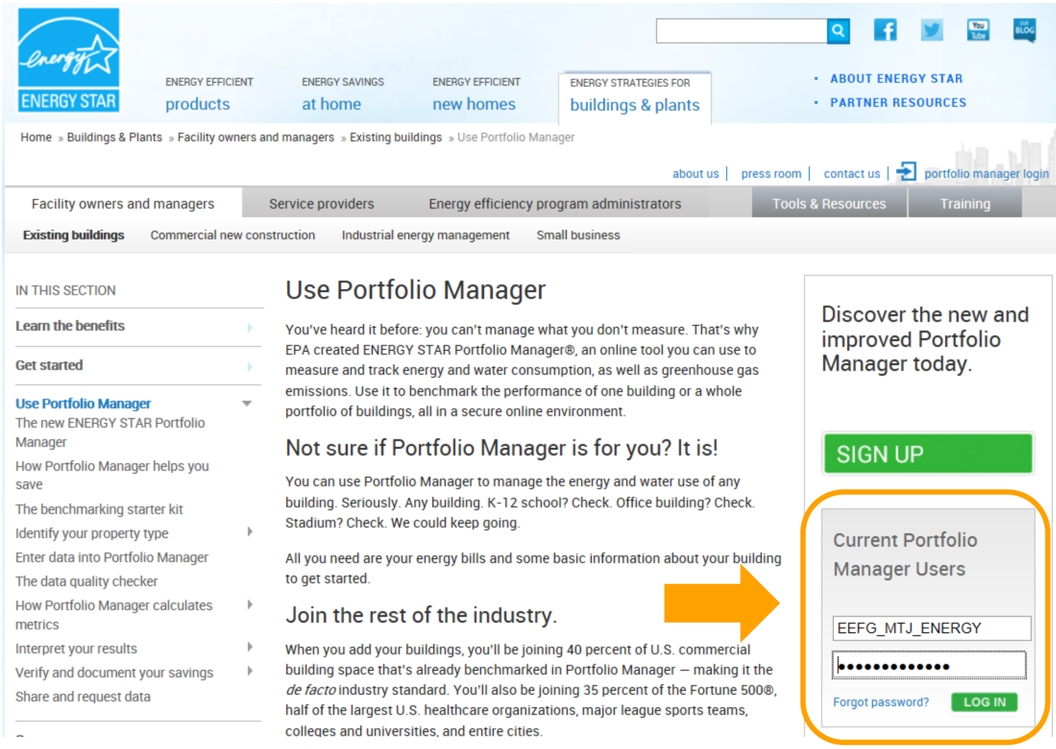
1.2 Fill out the required information (fields marked with red asterisk) and click **Create My Account,** which appears at the bottom of the screen after the security questions used to recover your account.

Note: Portfolio Manager's default is to enable others to search for your account to facilitate connecting with others.




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:
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
Will you be using the web services API to develop software to exchange data with Portfolio Manager?
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.
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
Searchability in Portfolio Manager
Can other people search for you and send you a connection request?
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.
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:
Select a Question
Your Answer:
Security Question 2:
Select a Question
Your Answer:
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

1.3 On the Portfolio Manager log in page (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.

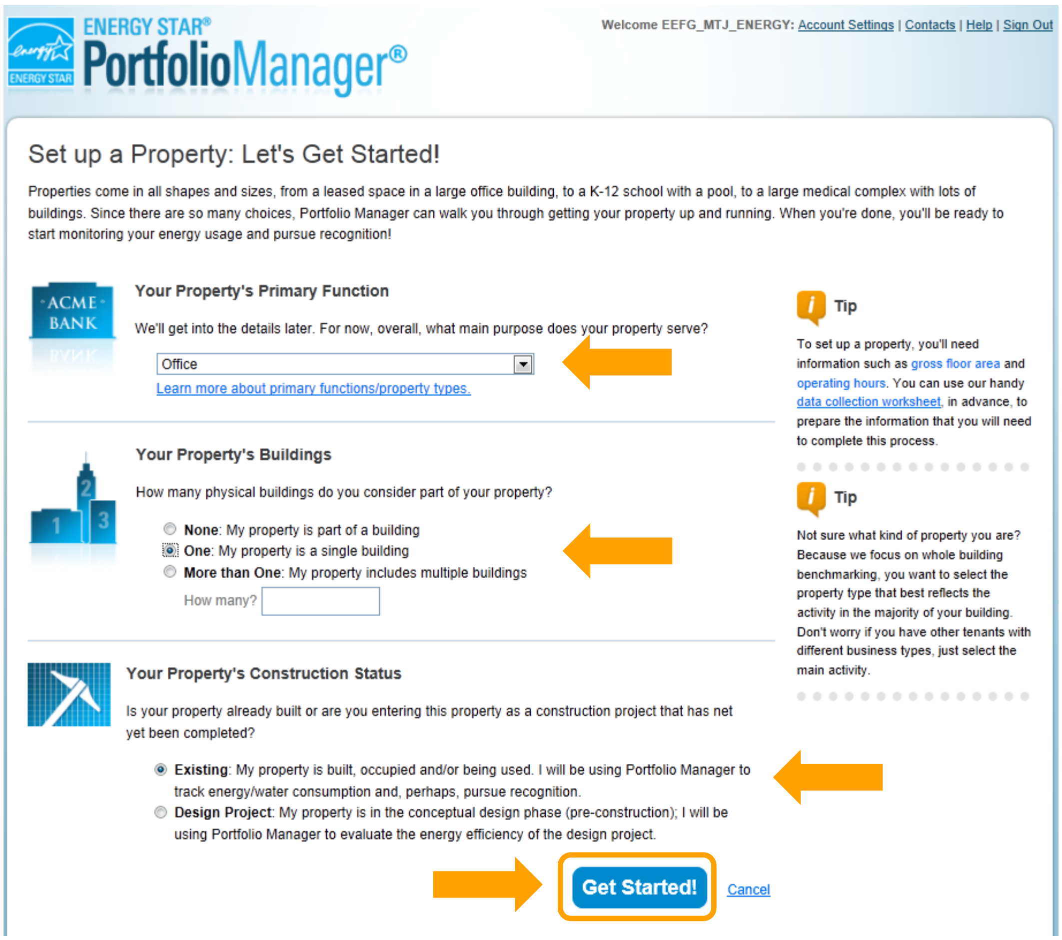


SECTION 2 | How to Create a Property Profile

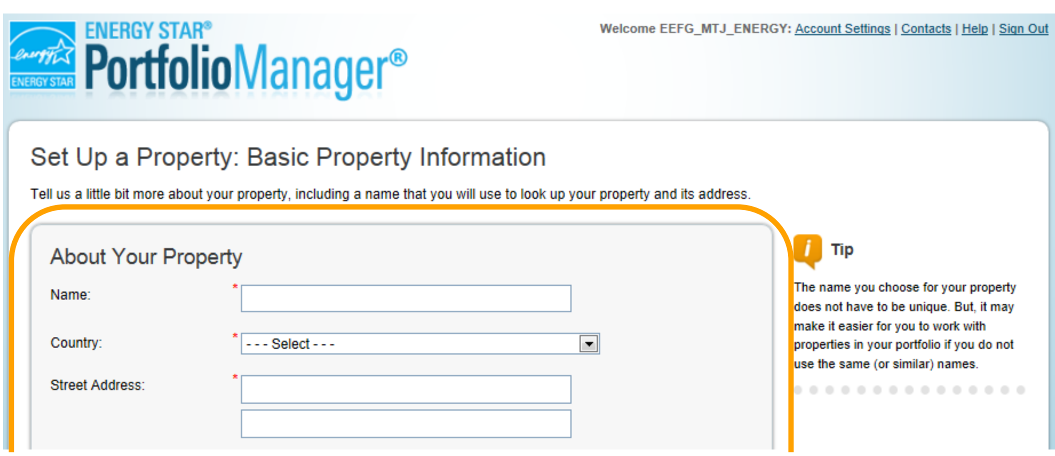
To benchmark your facility in Portfolio Manager, you will need to create a profile that has basic information about the property, how it is used, and the energy meters serving it.

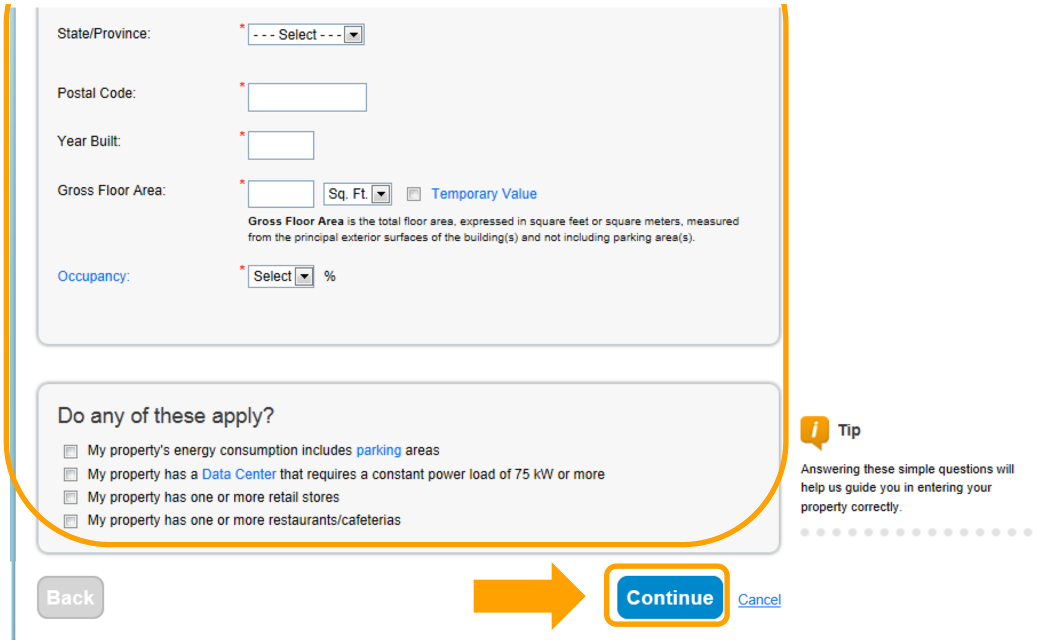
2.1 Add a property by clicking **Add a Property** on the **My Portfolio** tab. You can also upload multiple properties by clicking the hyperlink at the bottom of the screen.

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



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 PG&E's Web Services.

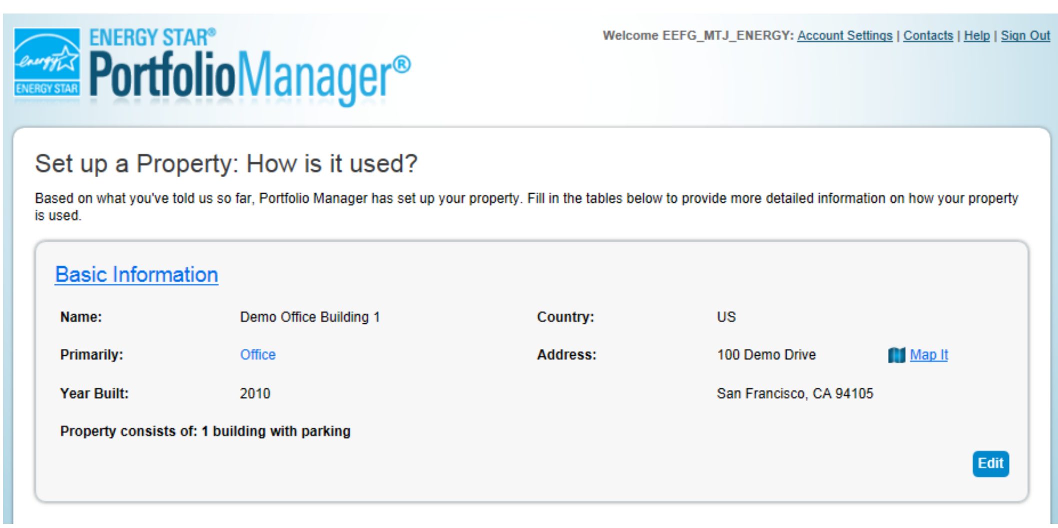


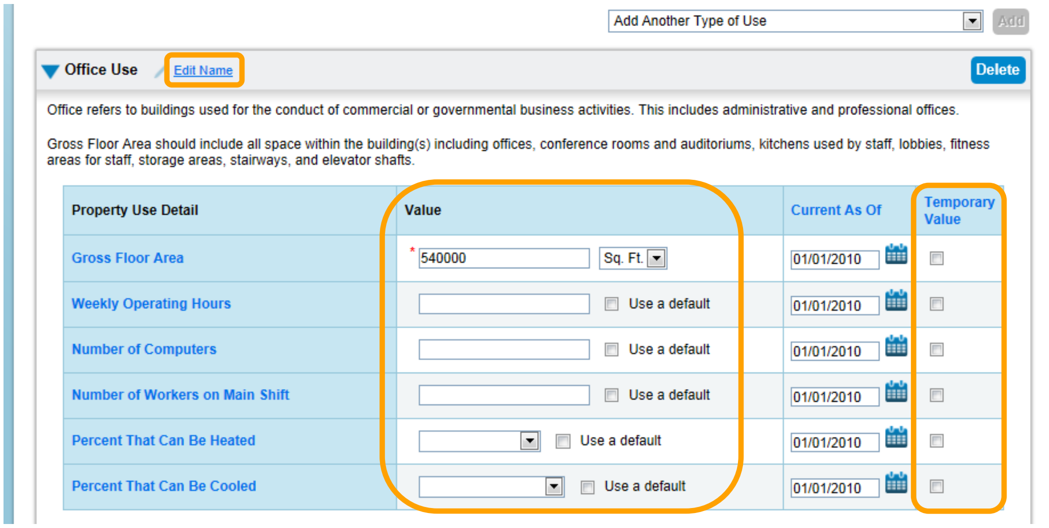


2.4 Enter the specific information on how your building is used. The fields required will depend on the selection made in Section 2.2 for the building's **Primary Function**.

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 function by clicking **Edit** next to the Primary Use Type, which is **Office Use** 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.

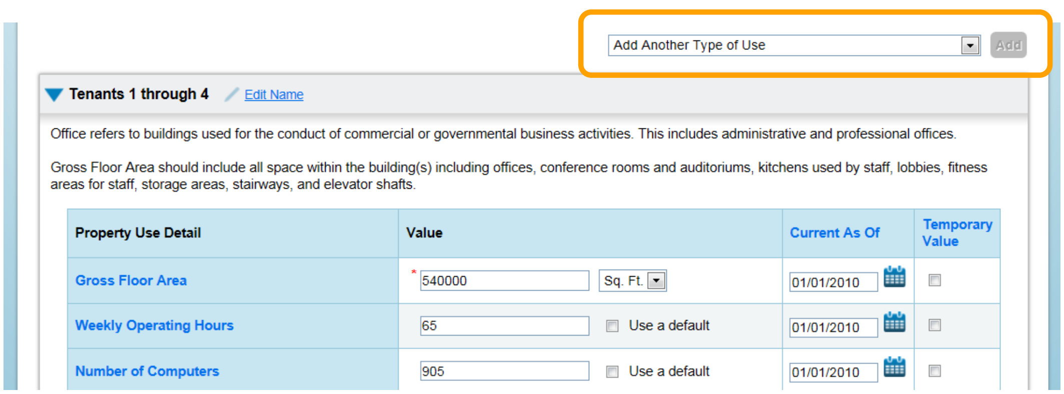




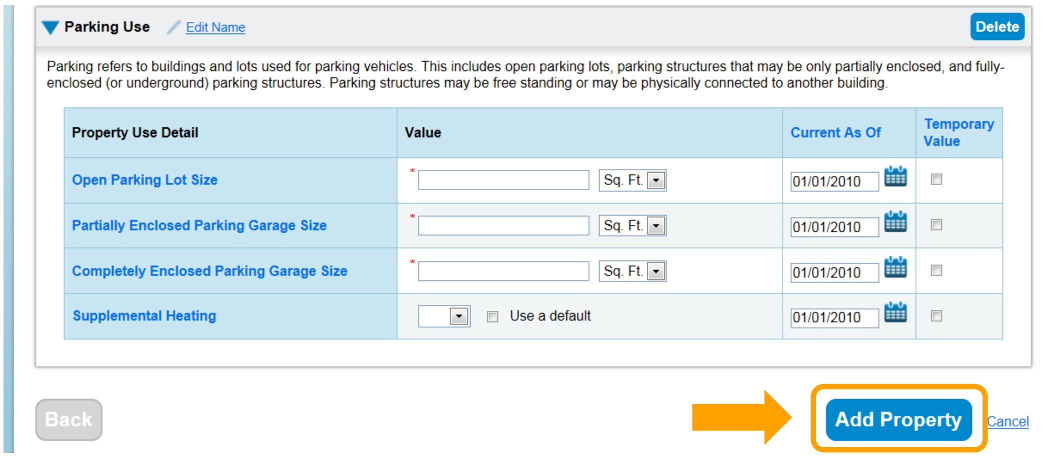
Adding Another Type of Use

Portfolio Manager uses the term “Type of Use” to characterize the various spaces within a building. Your building may have one or more space 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.

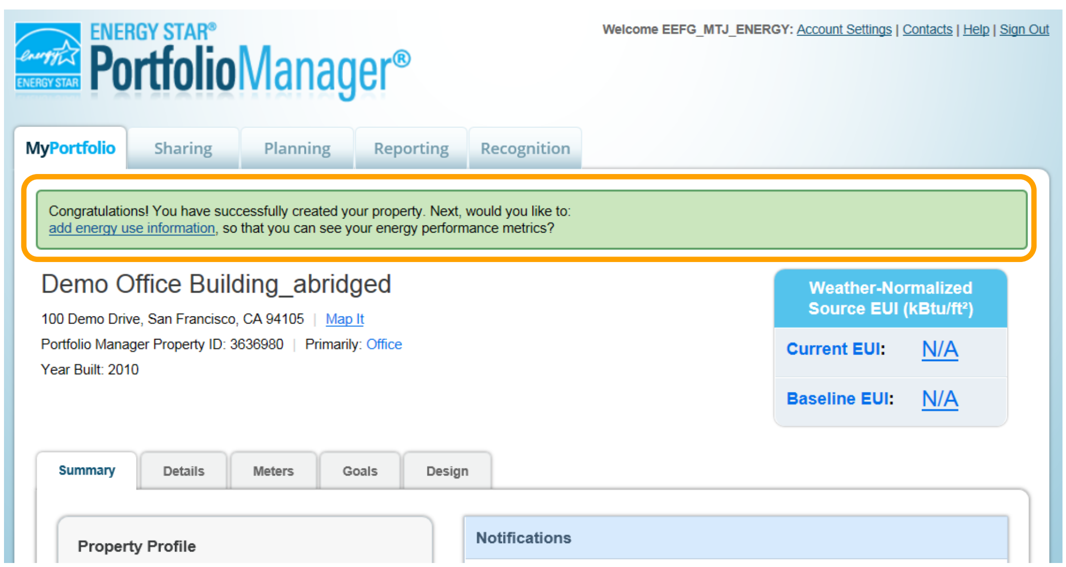
2.5 To add another space to your facility, click **Add Another Type of Use** and select the type of space you would like to add. Complete the required fields as you did in Section 2.4.



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**.



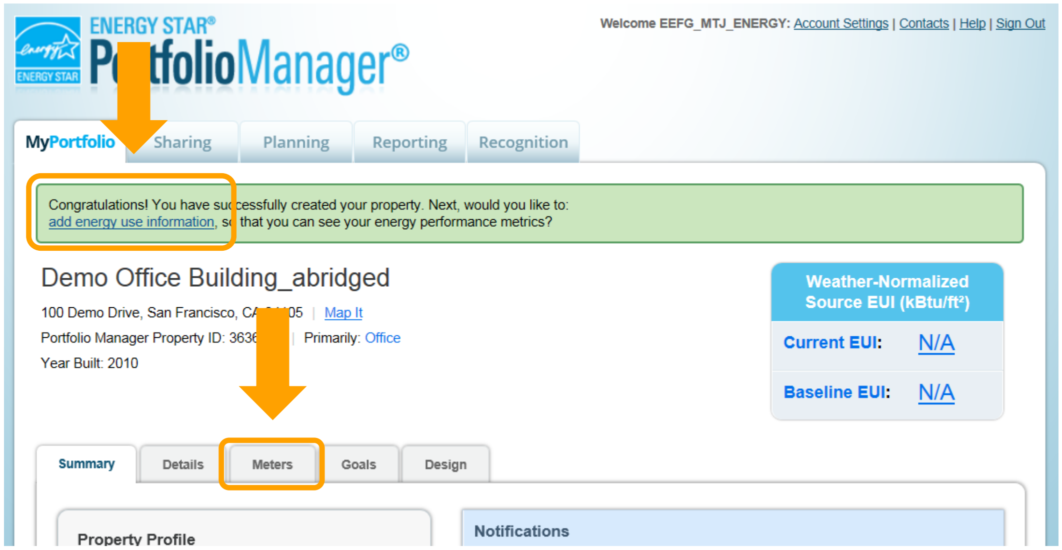
2.7 After saving your entries, you will see a green bar at the top of the Summary tab, confirming you have successfully created your property. The next section will provide the steps to set up your building's energy meters.



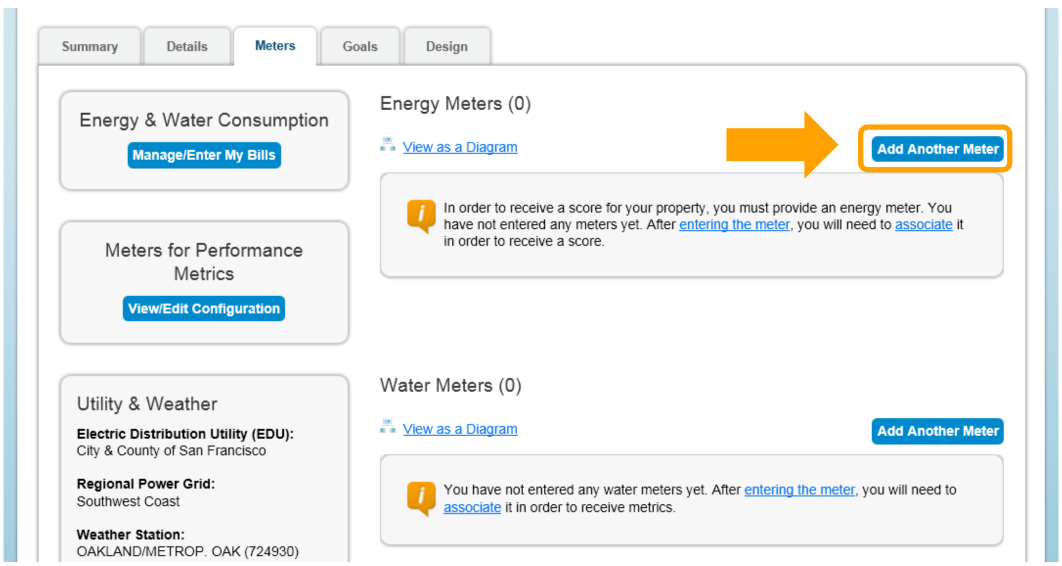
Setting up Energy Meters

You will need to add an Energy Meter to your property profile for each meter serving the building. For PG&E meters that you are signing up for Web Services, add one meter per Service ID/Meter Number. Refer to the Frequently Asked Questions at the end of this document for more information on locating the Service ID or Meter Number(s) on your PG&E 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.



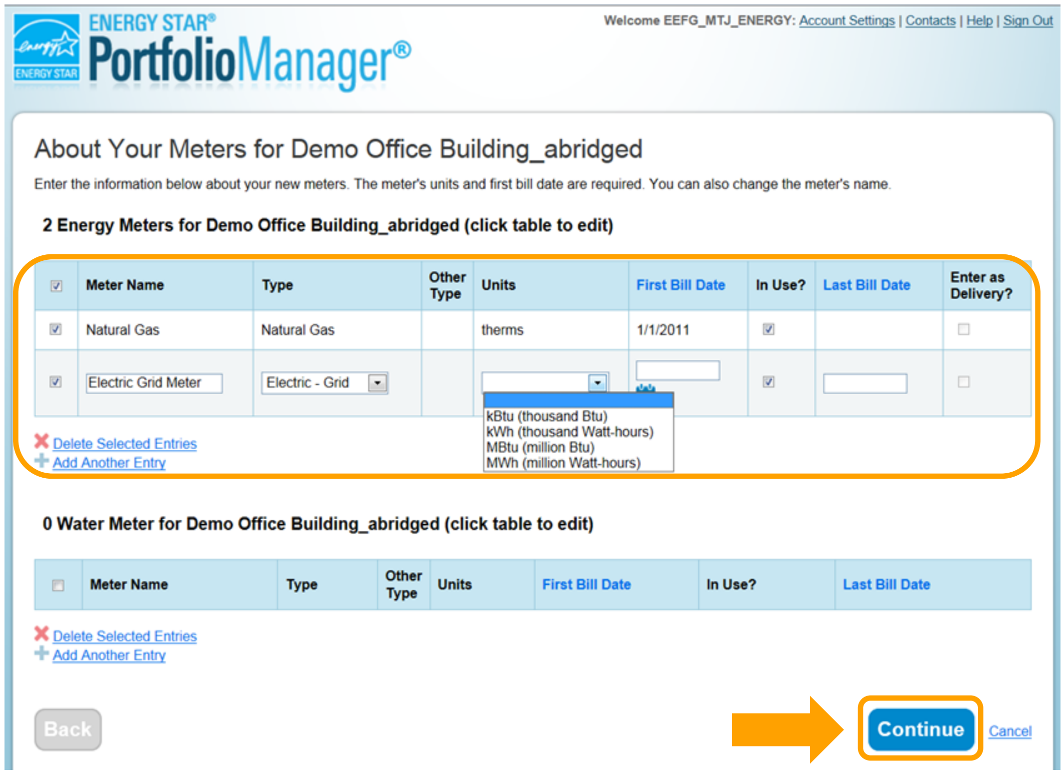
2.9 On the next screen, click **Add Another Meter**.



2.10 Indicate the sources of your property's energy. As you select different fuels, additional fields will appear. For PG&E electric meters, you should select **purchased from the grid**. After you have filled out the required information about the meter(s), click **Get Started**.

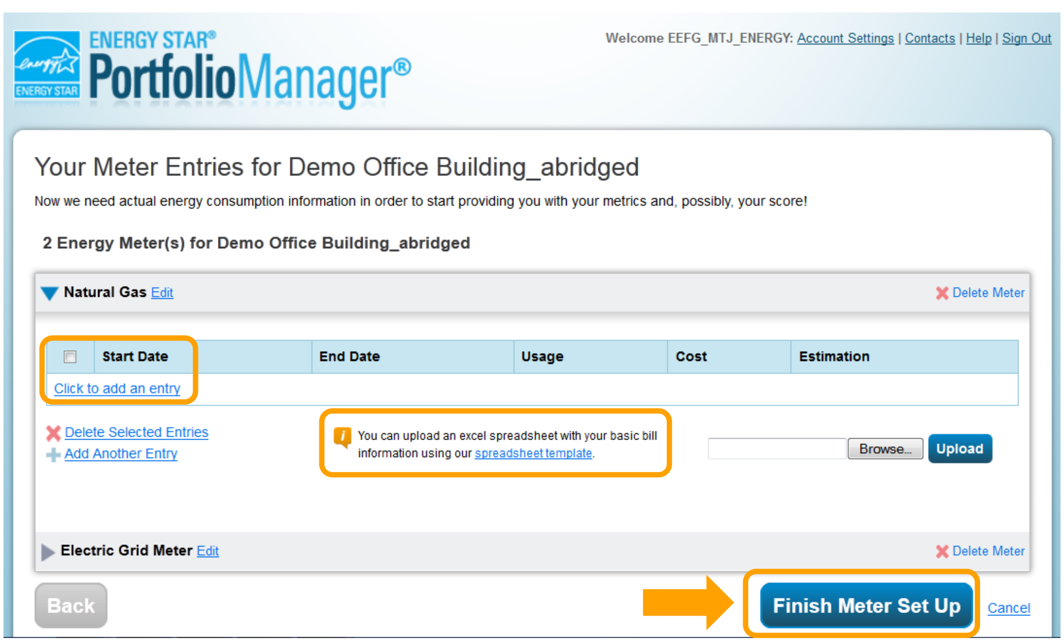
Note: You may also track your property's water usage, but it is not required to benchmark your property and will not factor into your benchmark score.

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 each meter was first billed. You can also rename any meter. If you have several electric and/or gas meters, it may be helpful to use the Meter Number as the **Meter Name, or any meaningful descriptor like the location in the building**. Then click **Continue.**

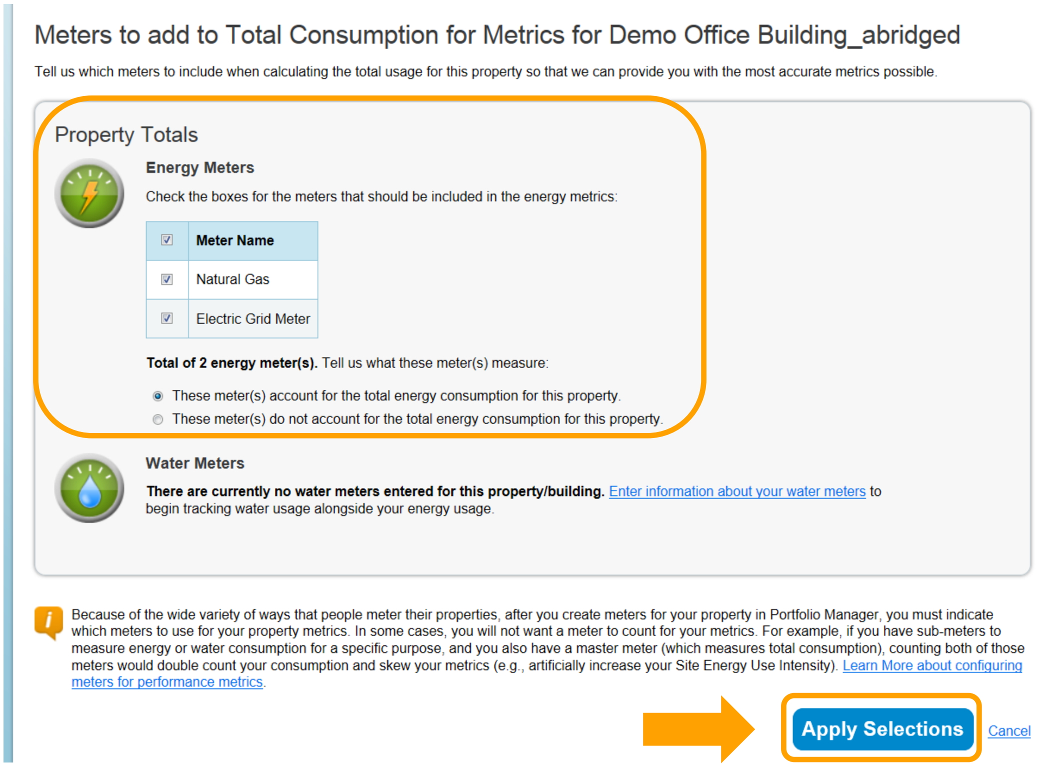


Note: For PG&E meters, the unit of electricity should be **kWh**, and the unit of natural gas should be **therms**.

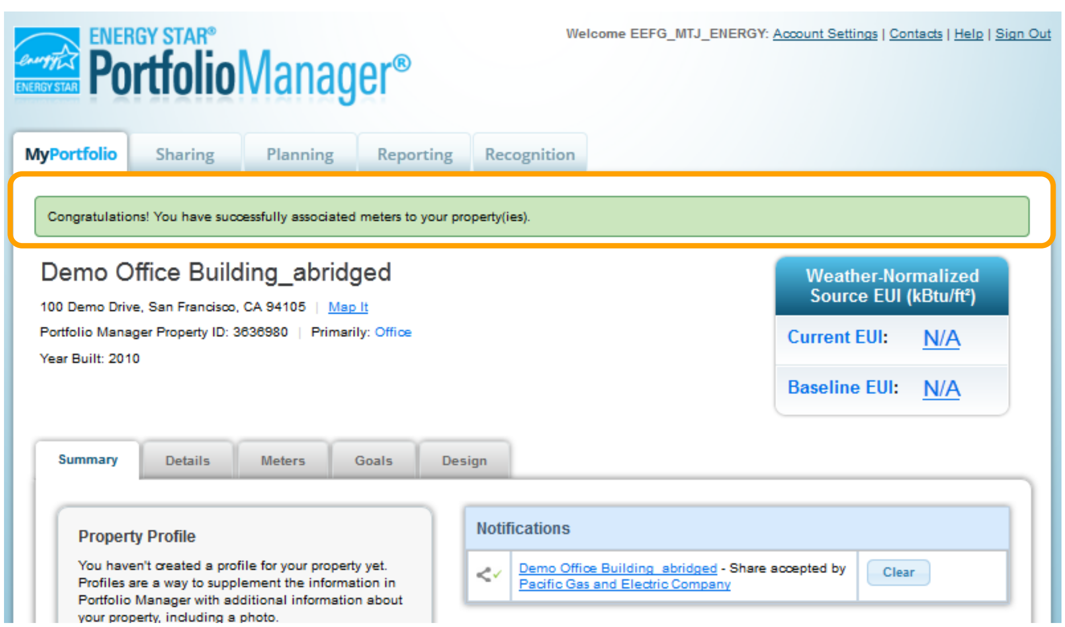
2.12 To add monthly meter entries manually, select **Click to add an entry**. You will then need to enter the billing **Start Date**, **End Date**, and **Usage** for each month. You can also upload an Excel spreadsheet to add multiple meter entries at once using the link at the bottom of the screen. However, if you intend to use PG&E's Web Services to upload your meter's historical data and usage automatically going forward, simply click **Finish Meter Set Up**.



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. After you have made your selections, click **Apply Selections**.



2.14 The Summary tab will have a green bar at the top, confirming you have successfully associated your meters with your property.

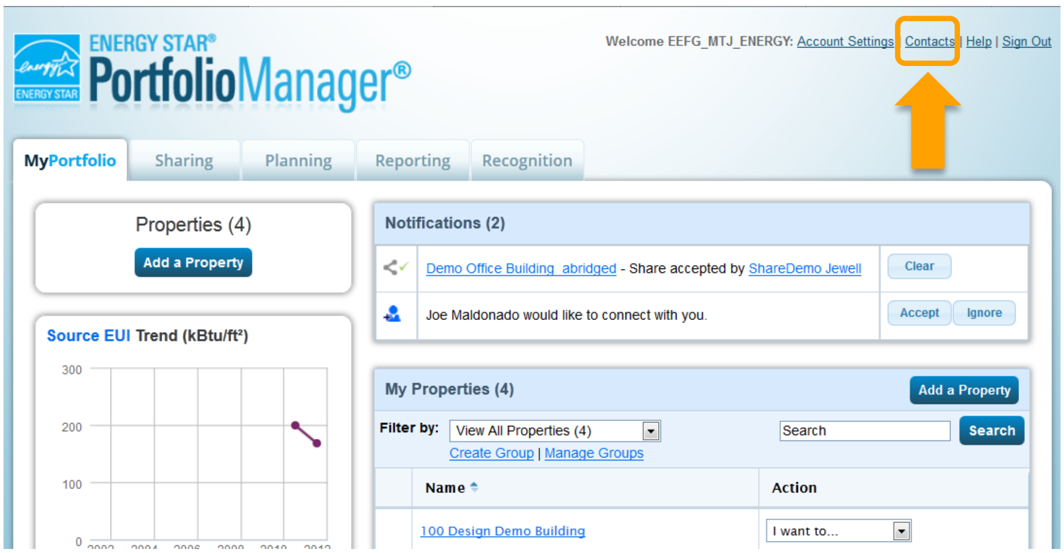


SECTION 3 | How to Enroll in PG&E's Web Services

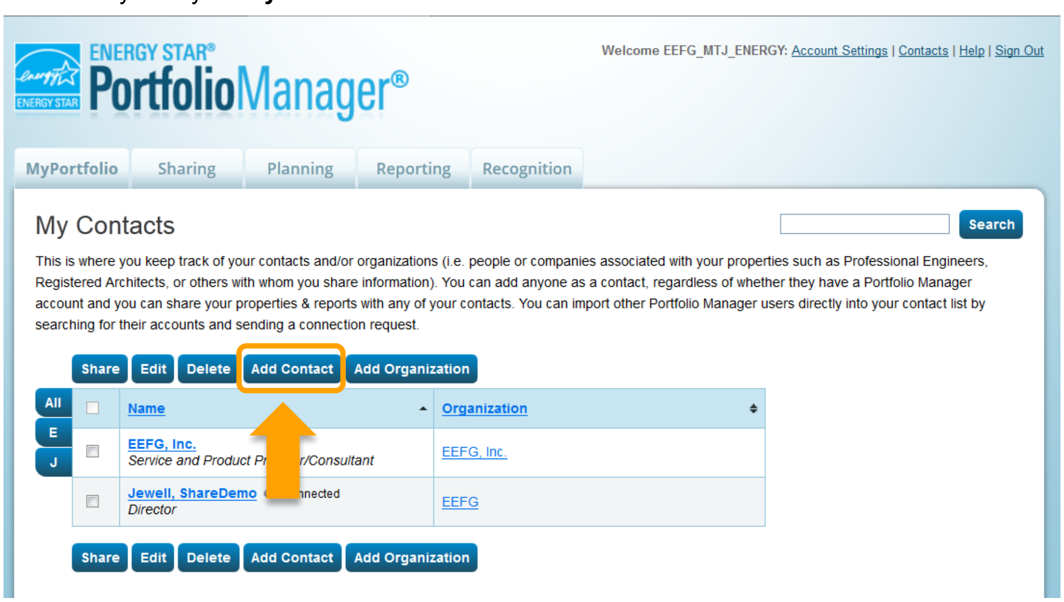
Before enrolling in PG&E's Web Services, make sure that:

- All of the meters have been added to the property profile.
- You have collected the Service ID or Meter Number for each meter.
- The city name is spelled correctly in the address for each property.
- Any manually entered meter data has been deleted if historical meter data from PG&E is desired. (Web Services will not populate meter entries prior to the most recent existing entry.)

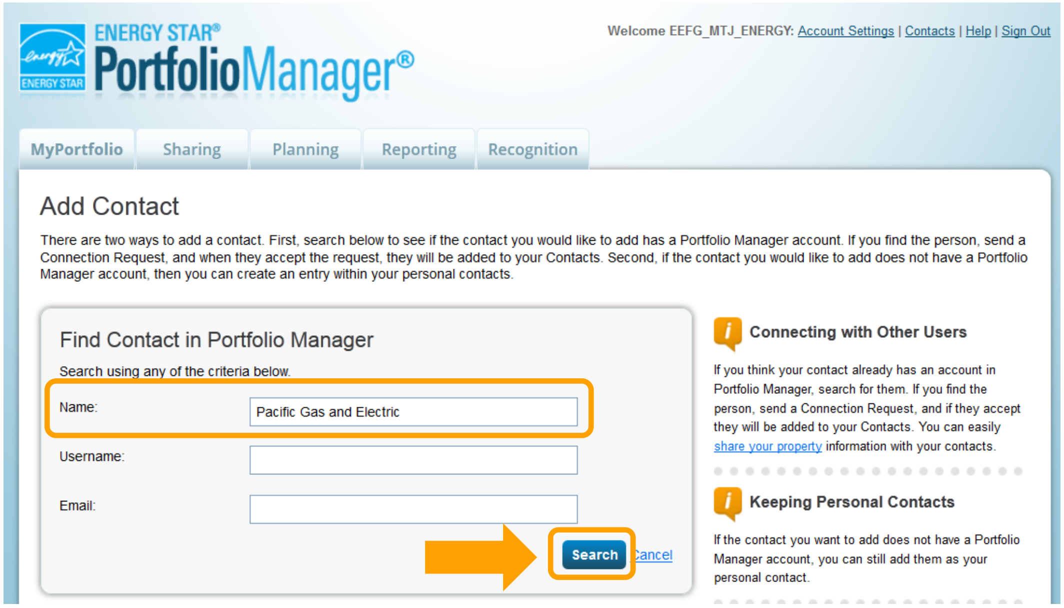
3.1 To set up Web Services, the first step is to connect with PG&E as a contact. Click on the **Contacts** link on the top right hand corner of the page.



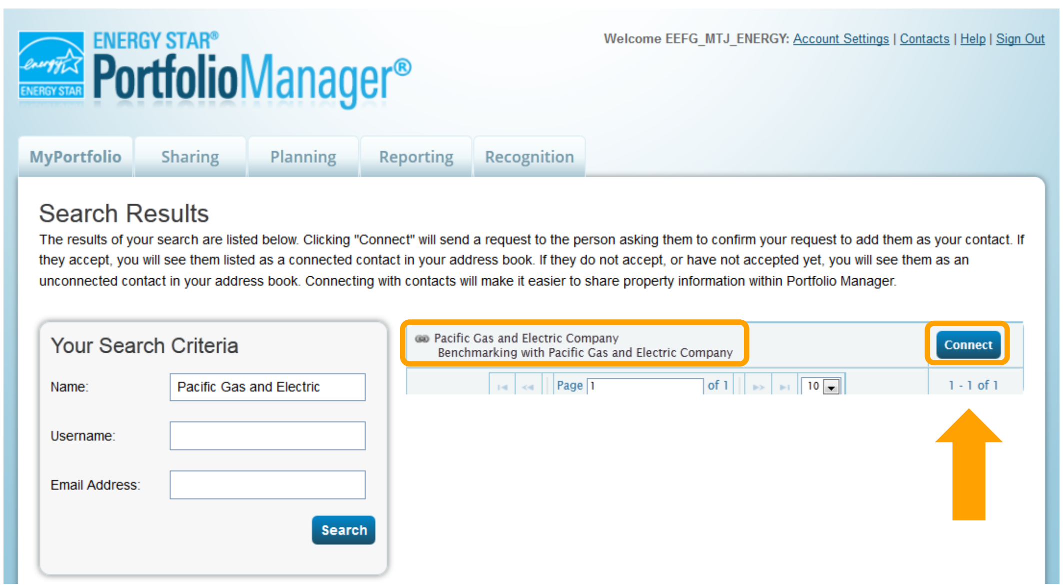
3.2 This takes you to your **My Contacts** list. Click **Add Contact.**



3.3a Search for PG&E by entering **"Pacific Gas and Electric"** in the **Name** field or by entering "**benchmarking@pge.com"** in the **Email** field. Click **Search.**

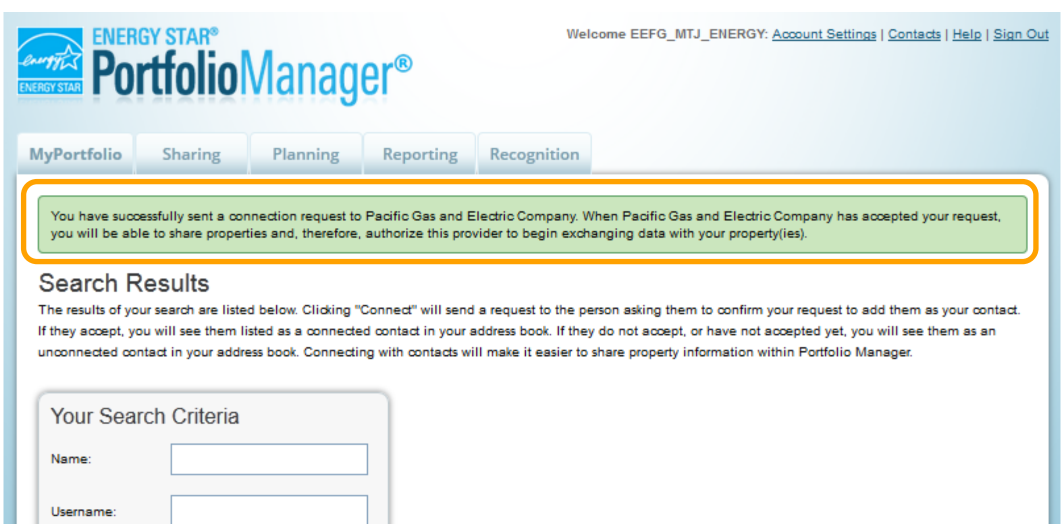


3.3b When the page refreshes, **Pacific Gas and Electric Company** will appear on the right-hand side of the page. Click "**Connect**".

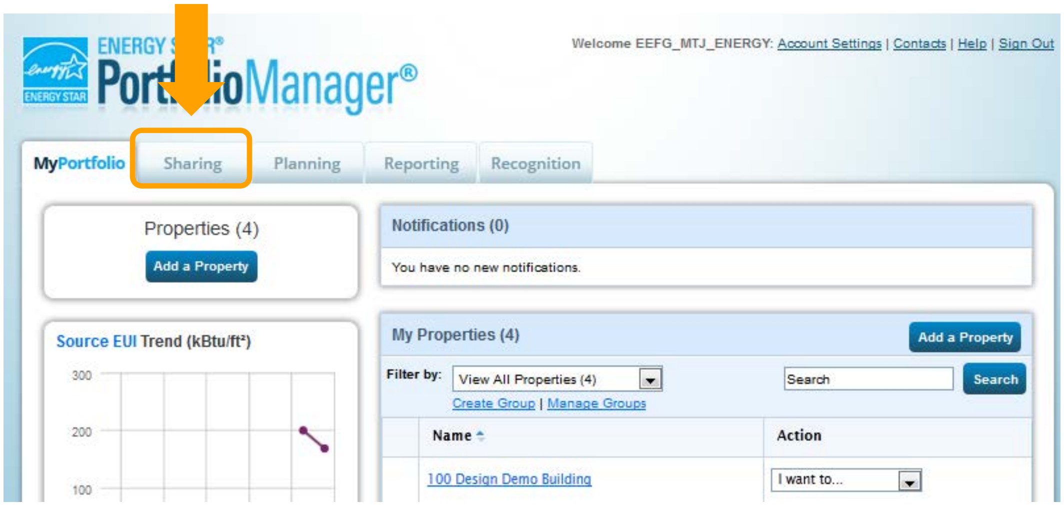


3.4 Enter the name and email address of the individual authorizing the connection with PG&E. Next, read and agree to PG&E's Terms of Use. Click **Send Connection Request.**

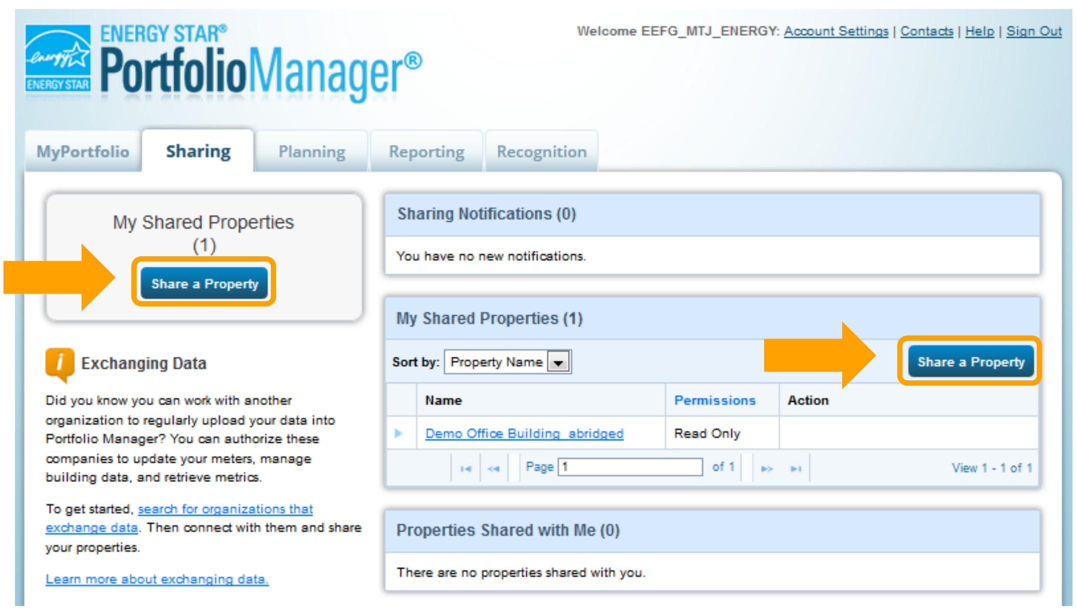
3.5 The top of the next page will show a green bar, confirming your connection request was sent to PG&E. **Note**: You are not yet connected to PG&E. PG&E must first accept your request. You will receive an email notification when PG&E accepts your request. The email will state, "Thank you for signing up for PG&E's ENERGY STAR Portfolio Manager Data Exchange Service. You have successfully connected your customer account to PG&E. Please return to Portfolio Manager and share your properties and meters so that PG&E can exchange data with you." The connection and notification typically takes less than 24 hours.



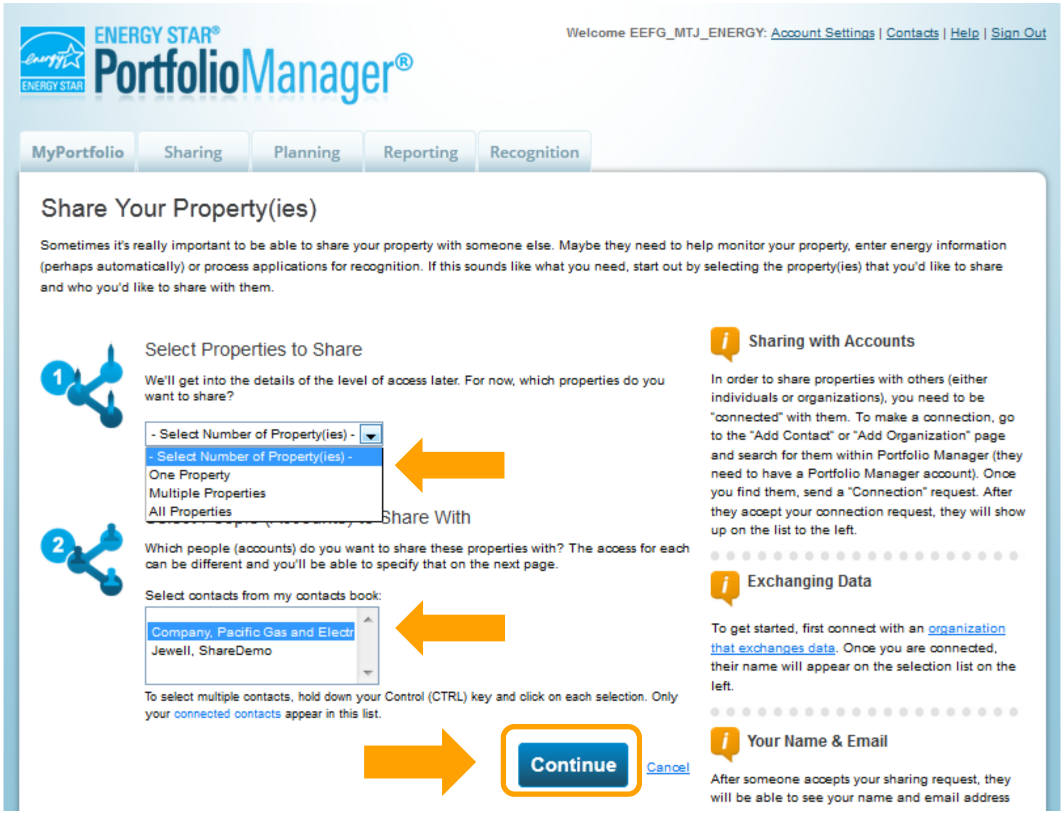
3.6 After you have received notification that PG&E has accepted your connection request, the next step is to share your property(ies) with PG&E's Portfolio Manager account. Click the **Sharing** tab.



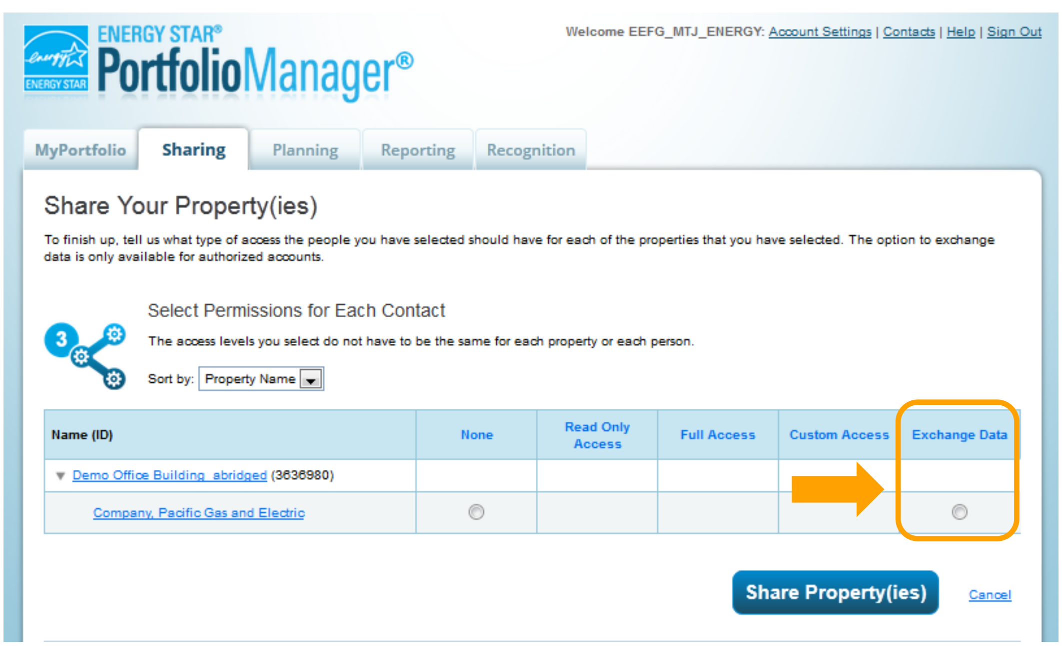
3.7 Click **Share a Property** in either location on this screen**.**



3.8 First, **Select Properties to Share**. Depending on your selection, a drop-down window or button will appear to choose the specific buildings you would like to share with PG&E. Next, choose PG&E as the **Account** with which you would like to share. Click **Continue.**



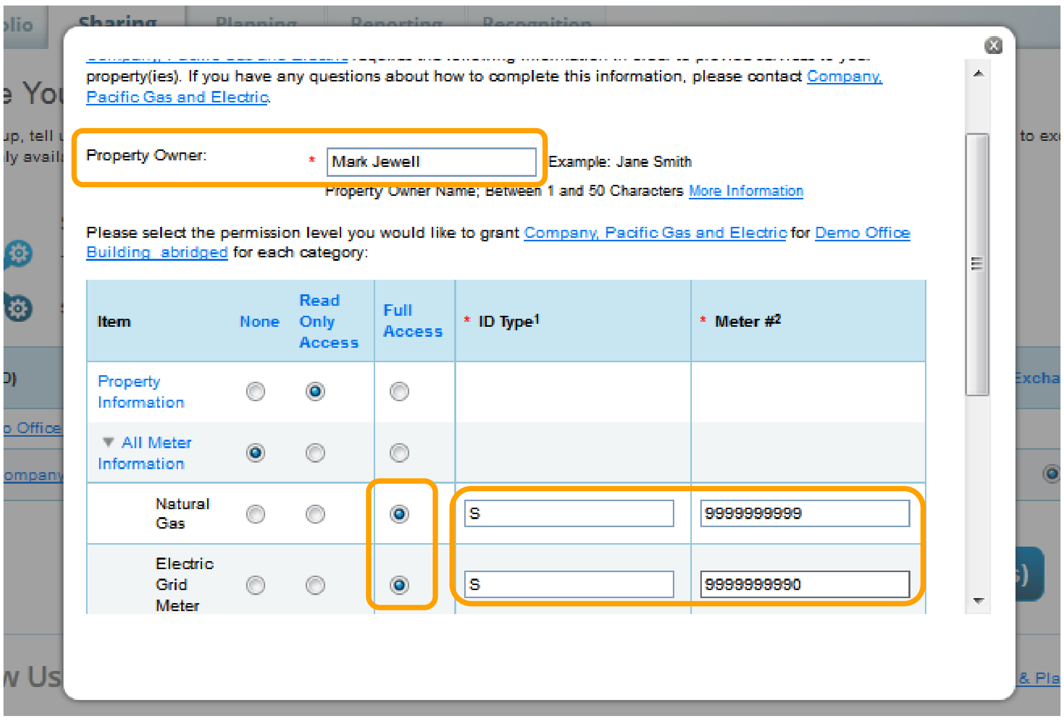
3.9a Select the **Exchange Data** radio button as the permission level to grant PG&E.



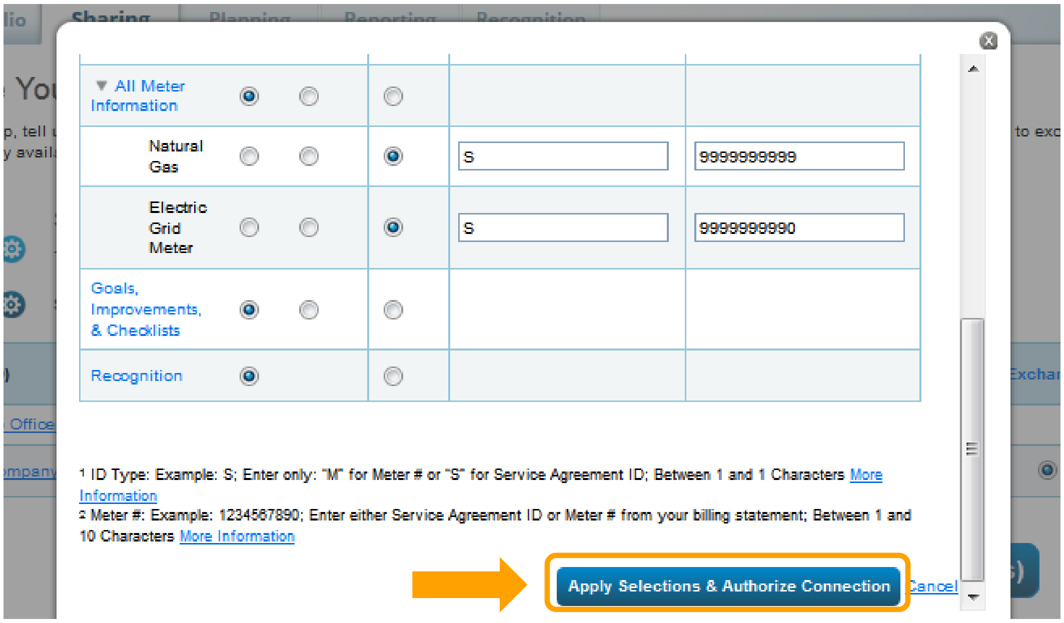
3.9b When the **Exchange Data** radio button is clicked, a pop-up window will appear. First, enter the name of the **Property Owner.** Next, for the meter(s) you would like to connect with PG&E's Web Services, click the **Full Access** radio button(s). You will not receive data from PG&E unless **Full Access** has been selected.

In the **ID Type** field, input an **S** if you will be providing the **Service Agreement ID Number** or an **M** if you will be providing the **Meter Number**. In this example, Service Agreement ID Numbers are used. In the **Meter #** field(s), provide the **Service Agreement ID Number**. (If you had entered **"M"** in the **ID Type** field, you would enter the **Meter Number** in the **Meter #** field.)

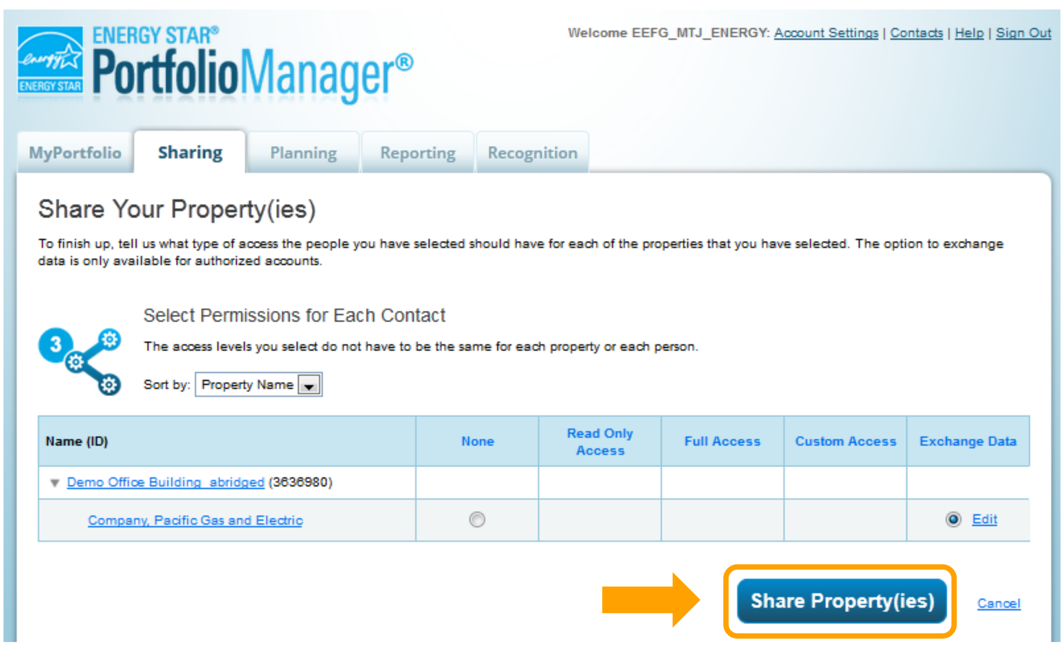
NOTE: All meter data for a property must be requested through this step. PG&E does not provide aggregated data for properties, only individual meter data.



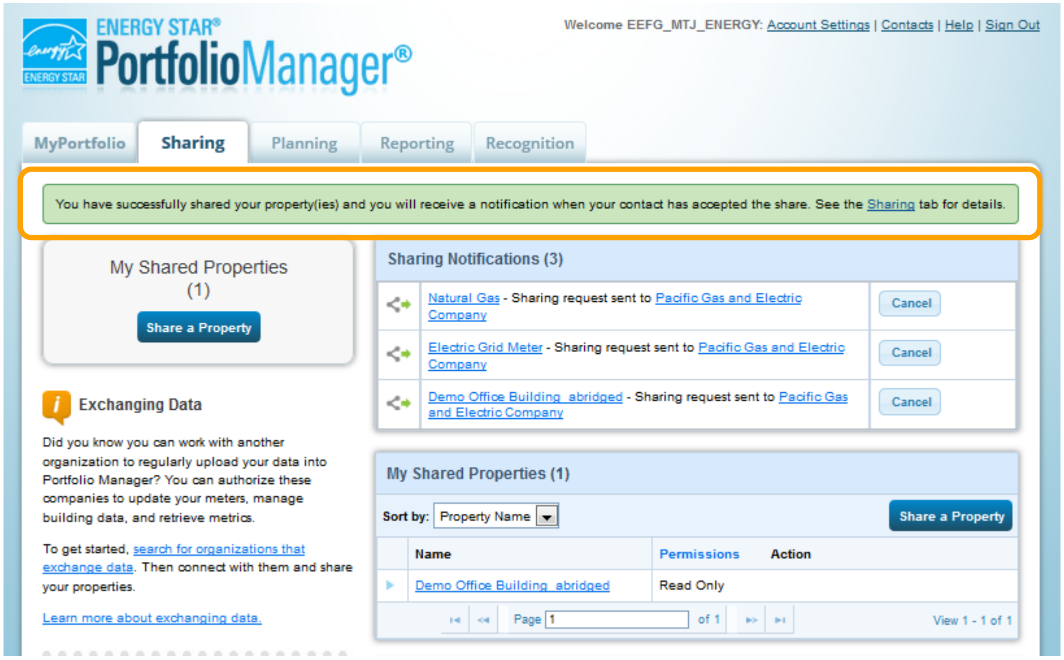
3.9c Scroll down and click **Apply Selections & Authorize Connection.**



3.9d When the pop-up window has closed, be sure to click **Share Property(ies)** to complete the data exchange request.



3.10 A green bar will appear at the top of the **Sharing** tab confirming the request was submitted. Your request should be processed within 1-2 business days after the customer authorization to release meter data (Step 3.11) has been received. Each shared meter will receive up to three years of meter history and will be updated once per month going forward. You can check on the status of your Exchange Data request by clicking on the **triangle** next to the **Property Name** in the **My Shared Properties** section.



3.11 Meter data will not be uploaded to Portfolio Manager until the Service Agreement ID has been authorized for release by the customer of record. See Section 4 for more information on completing this step.

Past Meter Energy Data

For meters that have been successfully shared, PG&E will populate up to three years of energy data for that meter, with the following exceptions:

- The meter has existed less than three years (e.g., a meter in a new building).
- The customer of record for the meter billing data has changed. In that case, only data for the current customer of record will be provided. The "customer of record" is determined by the actual customer, not the Account ID, Service ID number or Meter Number.
- If there are existing meter entries that were entered manually, PG&E's Web Services will not overwrite them; instead, entries will only be populated going forward from the last manual entry.

Monthly Updates

For meters that have been successfully validated, PG&E will update the meter with new entries as new billing data becomes available, with the following exceptions:

- If the meter becomes inactive, PG&E will automatically mark it as inactive in Portfolio Manager. If it is re-activated under the same customer it will start updating again.
- If the customer of record for the meter changes, PG&E will stop updating the meter. To continue receiving new meter entries, you will need to reshare the meter with the most current Service ID or Meter Number. See Section 5 for instructions on reauthorizing meters.

SECTION 4 | Customer Authorization

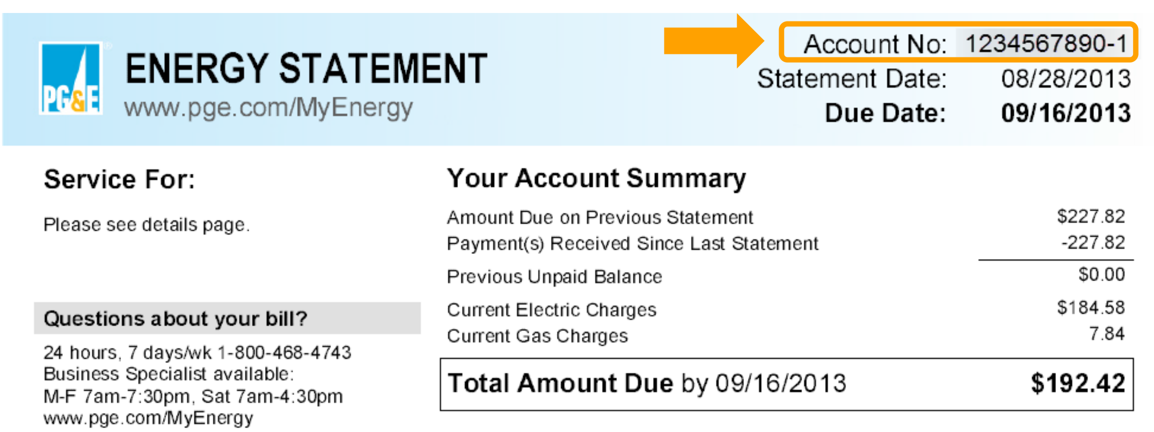
The next step is to have the customer of record for each meter shared with PG&E in Portfolio Manager authorize release of meter data to the Property Owner. Customers will need to complete the "Portfolio Manager Web Services Data Authorization" form, designating their building owner as the third-party authorized to receive their meter data. PG&E cannot provide aggregated data for each building, all meter data must be authorized for release by the customer of record.

NOTE: Since this process involves releasing data to Portfolio Manager and Environmental Protection Agency (EPA), all meters must be authorized for release even if the building owner is the customer of record for the meter.

This process can only be completed after the Property in Portfolio Manager has been shared with PG&E. Data will not be uploaded to Portfolio Manager until this step is complete.

To authorize release of the data, each customer of record must submit the "Portfolio Manager Web Services Data Authorization" form to PG&E. **The customer should have their monthly bill available to simplify this process.**

- The building owner will receive a confirmation email from PG&E that the property has been shared, which will include a reminder that all meters must have a customer authorization on file before data can be released. Links to the form and www.pge.com/benchmarking will be included.
- After the property has been shared with PG&E, the building owner will ask the customer to complete the authorization process. It is critical that the building owner waits until after the property has been shared with PG&E as the PG&E IT process uses the building information from Portfolio Manager to pre-load information in the online form for each customer.
- Customers will access www.pge.com/benchmarking to complete the "Portfolio Manager Web Services Data Authorization" form. There will be a link to the online form (December 2013) as well as a link to the PDF form.
- For the online form, the customer will need to enter the account number and either the phone number or meter number to access the form. The form will be pre-populated with the SA ID's tied to the account. The customer will need to denote if data is being authorized or revoked for release, select the SA ID's to be released, and designate an Authorized Third Party ("Property Owner" entered in step 3.9). The customer can search for the Property Owner by searching on their building's address. The customer may designate up to ten Authorized Third Parties. If the customer has multiple accounts, the form will need to be submitted for each account.
- For the paper form, the customer must denote if data is being authorized or revoked for release, enter the "Property Owner" (entered in step 3.9) on the "Name of Property Owner or Landlord" line of the form as well as the "Property Address" as the "Property Address, City" on the form, the account numbers, and the "Service Agreement IDs", which can be found on the customer's bill. The customer must sign the form and email to benchmarking@pge.com. I assume we will include a mailing address as well.
- The IT process will check for authorizations for 30 days. If the authorization is not confirmed within this time, an email will be sent to building owners reporting that meters have not been authorized for release. The building owner will have the responsibility for reconciling this with their tenant.



ENERGY STATEMENT
www.pge.com/MyEnergy

Account No: 1234567890-1
Statement Date: 08/28/2013
Due Date: 09/16/2013

Service For:

Please see details page.

Questions about your bill?

24 hours, 7 days/wk 1-800-468-4743
Business Specialist available:
M-F 7am-7:30pm, Sat 7am-4:30pm
www.pge.com/MyEnergy

Your Account Summary

Amount Due on Previous Statement	$227.82
Payment(s) Received Since Last Statement	-227.82
Previous Unpaid Balance	$0.00
Current Electric Charges	$184.58
Current Gas Charges	7.84
Total Amount Due by 09/16/2013	**$192.42**

PG&E

ENERGY STATEMENT

www.pge.com/MyEnergy

Account No: 1234567890-1
Statement Date: 08/28/2013
Due Date: 09/16/2013

Summary of your energy related services

	Meter Number	Usage	Amount
Service For: 123 Main Street			
Service Agreement ID: 5202490327			
Gas Charges	61083650	0.000000 Therms	$7.84
Total			**$7.84**
Service For: 123 Main Street			
Service Agreement ID: 5202490625			
Electric Charges	1005719171	773.720000 kWh	$184.58
Total			**$184.58**

SECTION 5 | Troubleshooting Web Services Errors

If you have shared meters with PG&E for Web Services, you should receive an email within 1-2 business days indicating the success of your request and advising you of any error messages. Please follow the steps below for resolution of each error message:

Invalid Service ID or Meter Number

The Service ID or Meter Number you entered is either incorrect or is not the most current one. If the meter is deemed to be inactive, this refers to the last Service ID number that was active for the meter. Common causes of this error include:

- Data entry error when typing in the Service ID number or Meter Number.
- Entering the Account ID instead of the Service ID number or Meter Number. To see where the Service ID and Meter Numbers are on your bill, refer to the Frequently Asked Questions section at the end of this document.
- The Service ID number is not active, or in the case of an inactive meter, is not the Service ID number that was most recently active. Make sure you have entered the current Service ID number for the meter.

After verifying the correct Service ID or Meter Number, reshare the meter, making sure that the number you typed is correct. See Section 5.3 for instructions on reauthorizing meters.

City Name Does Not Match ID Number

The city name of the property address does not match the city name on file for the meter identified. Most often, this error is the result of a typo or using an abbreviation for the city name (e.g., entering "S.F." instead of "San Francisco").

To correct this error, on the **Details** tab of the property profile, click **Edit** in the **Basic Information** box. Correct the spelling of the city name, scroll down and click **Update Property**. After making this correction, reshare the meter. See Section 5.3 for instructions on reauthorizing meters.

Meter Already Shared in Same Building

This error is the result of attempting to share multiple meters with the same Service ID number. After verifying the correct Service ID number, reshare the meter, making sure that the number you typed is correct. See Section 5.3 for instructions on resharing meters.

If you created a duplicate meter by mistake, you can delete the duplicate from the **Meters** tab in your property profile. Next to the name of the duplicate meter, select **Delete Meter** from the **Action** drop-down menu. Click **Continue** on the pop-up window to confirm the meter's deletion.

Duplicate Meter ID

This error is the result of attempting to share multiple meters with the same Meter Number. After verifying the correct Meter Number, reshare the meter, making sure that the number you typed is correct. See Section 5.3 for instructions on resharing meters.

If you created a duplicate meter by mistake, you can delete it from the **Meters** tab in your property profile. Next to the name of the duplicate meter, select **Delete Meter** from the **Action** drop-down menu. Click **Continue** on the pop-up window to confirm you want to delete that meter.

Read Only

This error is the result of providing PG&E with **Read Only Access** for your meter instead of **Full Access.** See Section 5 on resharing meters.

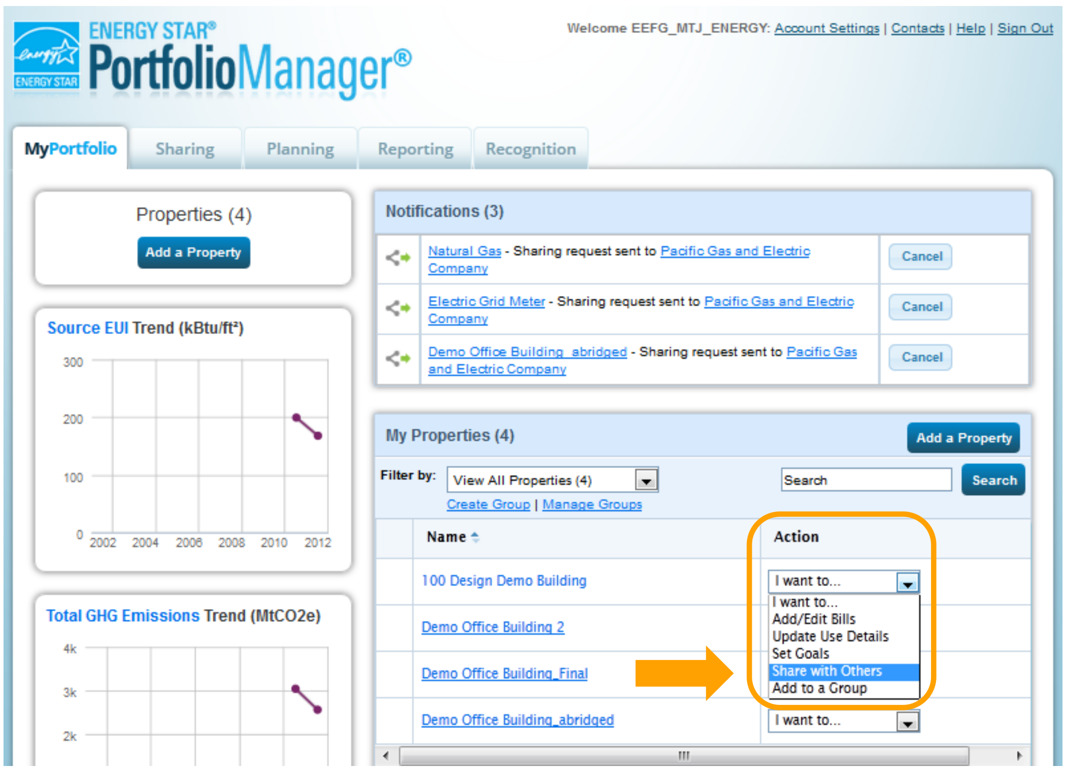
System Error

If you receive an email stating a system error is preventing PG&E from uploading your energy data, contact us at benchmarking@pge.com for assistance.

SECTION 6 | Changing Web Services Authorizations: Share Additional Properties and Meters, Reshare Meters, or Change Permissions

Sharing Additional Properties and Meters with PG&E's Web Services

6.1 Once you are connected with PG&E (see Sections 3.1 - 3.5), you can share additional properties with PG&E and share Web Services for their meters in a few easy steps. On the **My Portfolio** tab, under the **Action** column, select **Share with Others** next to the appropriate property name.

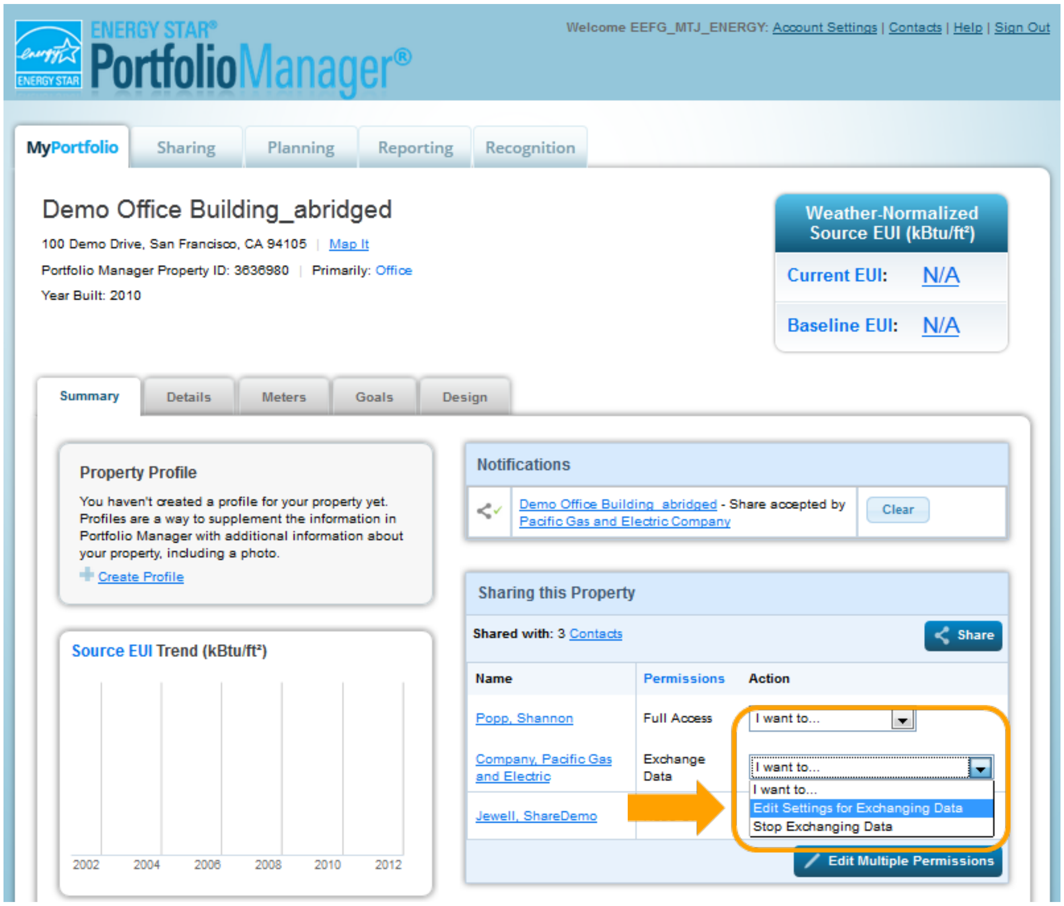


6.2 Next, follow instructions in Sections **3.8 – 3.10** to connect the property's meters with PG&E's Web Services.

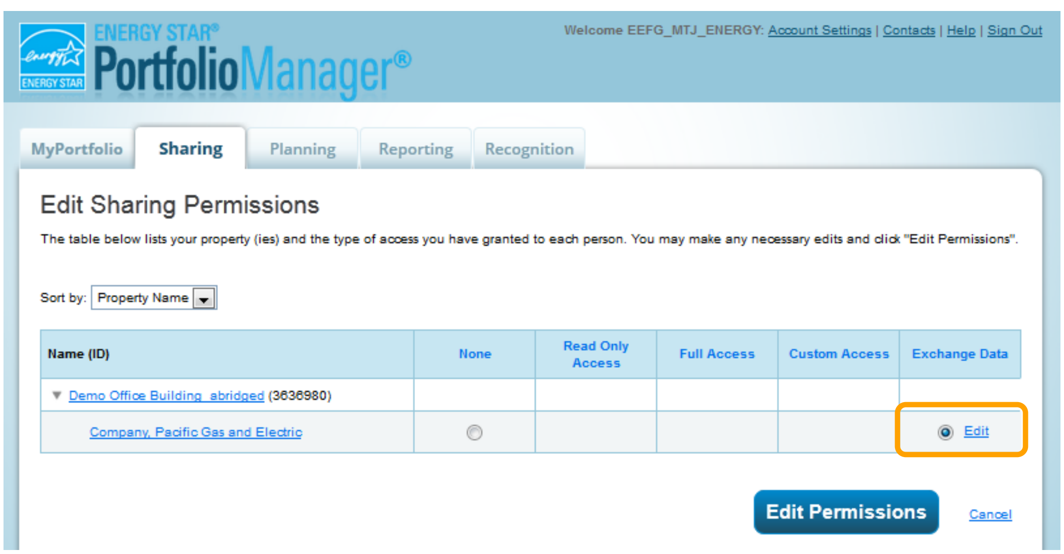
Resharing Meters

6.3a If the customer of record has changed for your meter, or you received an email with an error message for a meter you previously tried to grant PG&E access to, you may need to reshare the meter.

From the property profile **Summary** tab, under the **Action** drop-down menu for PG&E, select **Edit Settings for Exchanging Data.**



6.3b Click on the **Edit** link in the **Exchange Data** column.

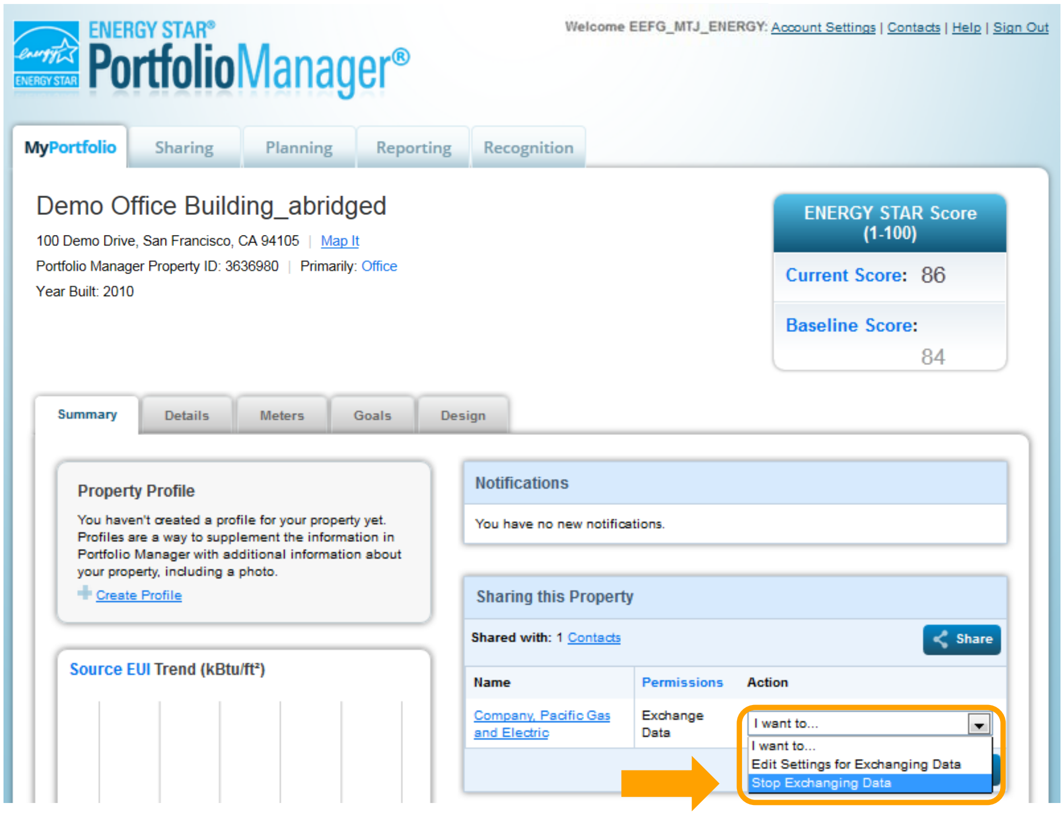


6.3c Follow instructions in Sections 3.9b – 3.10 to finalize the reauthorization with the new or correct Service ID/Meter Number(s).

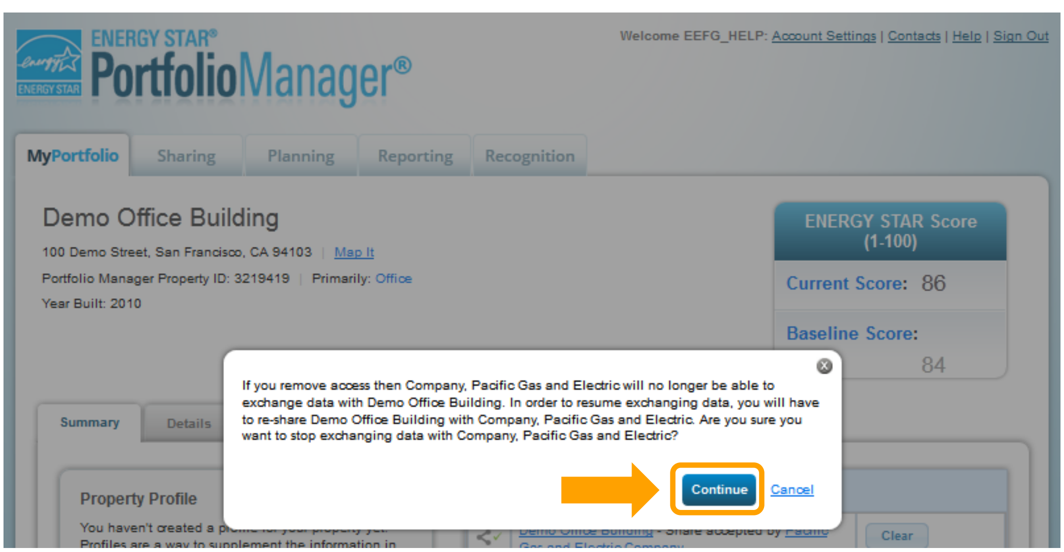
Changing Permissions for Specific Properties and/or Meters

6.4 From the property profile **Summary** tab, under the **Action** drop-down menu for PG&E, you have two options: **Stop Exchanging Data** or **Edit Settings for Exchanging data.**

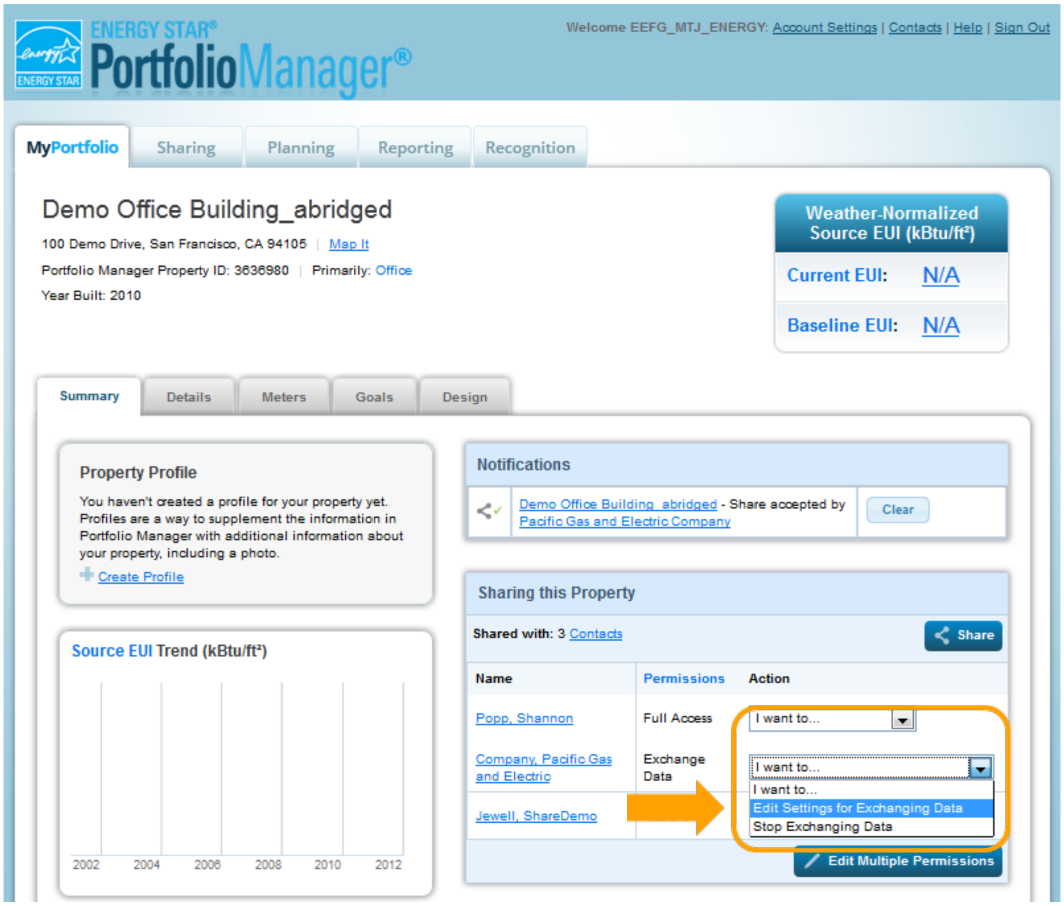
6.4a To stop sharing your property and all of its associate meters with PG&E, select **Stop Sharing Data.**



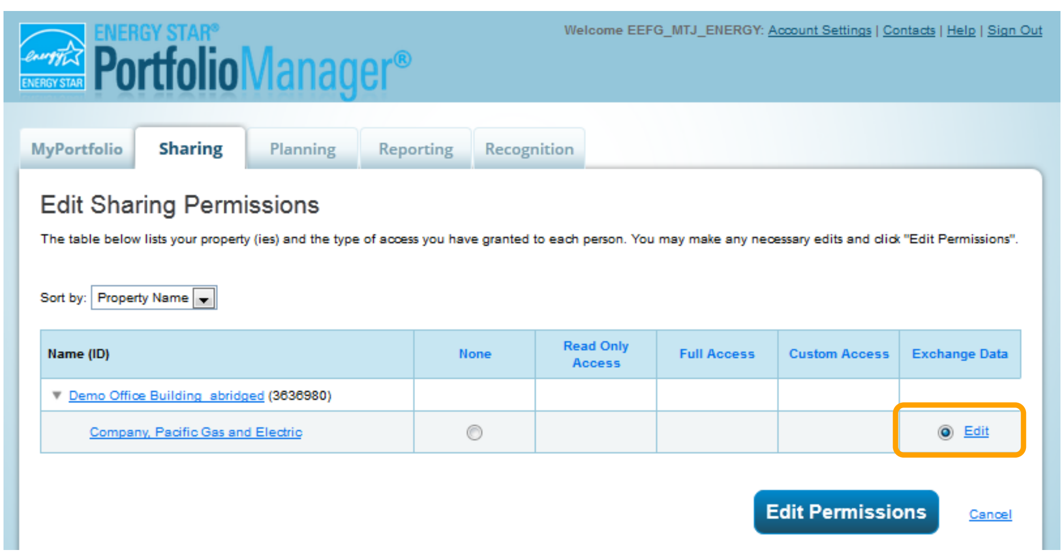
6.4b A pop-up window will appear to confirm that you want to remove PG&E's access. Click **Continue**.



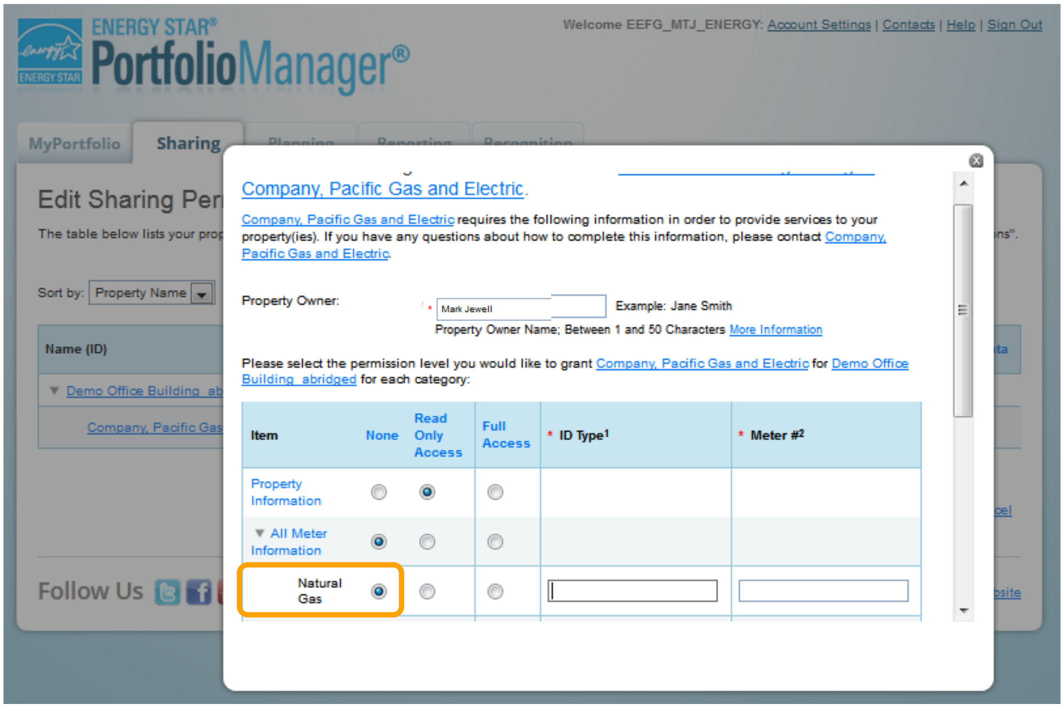
6.5a To share additional meters with PG&E or remove PG&E's access to individual meters, select **Edit Settings for Exchanging Data.**



6.5b Click on the **Exchange Data** radio button.



6.5c A pop-up window with the Data Exchange Access Permissions will open. For meters for which you would like to **remove** PG&E's access, select the **None** radio button and continue with Sections 3.9c – 3.9d. For new meters you would like to **share**, follow the steps outlined in Sections 3.9b – 3.10.



Notes:

- If **Exchange Data: Pending** is displayed under the sharing **Permissions** for PG&E, your previous request has not yet been processed. If it has been more than 2 business days, contact PG&E via email.
- If you receive an error message when trying to share a property, it may mean that you are not the "Property Owner" (i.e., the individual who set up the property profile). If the property has been shared with you, you are not permitted to share it with other accounts or PG&E's Web Services. You can determine who the "Property Owner" is by going to the **Sharing** tab and scrolling down to **Properties Shared with Me.** Information on who shared the property with you is provided in that table.

6.6 **For newly shared or reshared properties and meters:** When your request to exchange data is processed, you will receive an email indicating for each meter whether it was successfully validated or produced an error. You should receive this email within 1-2 business days.

For meters that have been successfully validated, PG&E will populate up to three years of energy data for that meter, with the following exceptions:

- The meter has existed less than three years (e.g., a new building).
- The customer of record for the meter billing data has changed. In that case, only data for the current customer of record will be provided. The "customer of record" is determined by the actual customer, not the Account ID, Service ID or Meter Number.
- If there are existing meter entries that were entered manually, PG&E's Web Services will not overwrite them; instead, entries will only be populated going forward from the last manual entry.
- "Date Meter became Active" field is incorrect. This is a new field in Portfolio Manager. We have found that some meters previously shared using the now-obsolete ABS system are incorrectly entered, preventing the full three years of history from populating. Under the **Meters** tab, select **Edit Basic Meter Information** under the **Action** drop-down menu. Make sure the **Date Meter became Active** field is set to a date more than three years ago.

For meters that have been successfully validated, PG&E will update the meter with new entries as new billing data becomes available, with the following exceptions:

- If the meter becomes inactive, PG&E will automatically mark it as inactive in Portfolio Manager. If it is reactivated under the same customer it will start updating again.
- If the customer of record for the meter changes, PG&E will stop updating the meter. To continue receiving new meter entries, you will need to reshare that meter with PG&E. See Section 5.3 on instructions for reauthorizing meters.

If, after 2 business days, you have not received an email and your meter data has not been populated, please send an email to PG&E and include your Portfolio Manager username and a list of the specific properties and meters that require attention. If you receive an email with error messages, refer to Section 4 for troubleshooting instructions.

For unshared properties and meters: If you have unshared your property with PG&E, that means that PG&E will no longer update any meters for that property, but any existing meter entries will not be removed from Portfolio Manager.

SECTION 7 | Frequently Asked Questions (FAQs)

Where can I find the Account Number, Service Agreement ID and Meter ID for my meters?

For Property Owners: The Meter ID is likely more accessible for you. Use the Meter Number located on the physical Meter at the property to configure Web Services.

For Customers of Record for each Meter: All of this information can be found on the customer of record's monthly bill. Each meter has a Service Agreement ID (SA ID) number and a Meter Number. Either number can be used to configure Web Services. You can find the Account Number at the top of each page of your bill. You can find the Meter Numbers for each meter in the "SUMMARY OF YOUR ENERGY RELATED SERVICES" (shown below) or the "GAS SERVICE CHARGES" and "ELECTRIC SERVICE CHARGES" portions of your bill. Please review your bill closely as you may have multiple Account Numbers, Meter Number's, and Service Agreement ID's. You can also use PG&E's online tool, MyEnergy, to identify your Account Number(s), Service Agreement ID number(s), and Meter Number(s).

PG&E **ENERGY STATEMENT**
www.pge.com/MyEnergy

Account No: 1234567890-1
Statement Date: 08/28/2013
Due Date: 09/16/2013

Service For:

Please see details page.

Questions about your bill?

24 hours, 7 days/wk 1-800-468-4743
Business Specialist available:
M-F 7am-7:30pm, Sat 7am-4:30pm
www.pge.com/MyEnergy

Your Account Summary

Amount Due on Previous Statement	$227.82
Payment(s) Received Since Last Statement	-227.82
Previous Unpaid Balance	$0.00
Current Electric Charges	$184.58
Current Gas Charges	7.84
Total Amount Due by 09/16/2013	**$192.42**

PG&E **ENERGY STATEMENT**
www.pge.com/MyEnergy

Account No: 1234567890-1
Statement Date: 08/28/2013
Due Date: 09/16/2013

Summary of your energy related services

	Meter Number	Usage	Amount
Service For: 123 Main Street			
Service Agreement ID: 5202490327			
Gas Charges	61083650	0.000000 Therms	$7.84
Total			**$7.84**
Service For: 123 Main Street			
Service Agreement ID: 5202490625			
Electric Charges	1005719171	773.720000 kWh	$184.58
Total			**$184.58**

How long will it take for my Portfolio Manager account to receive meter data after I sign up for Web Services?

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 information in Section 4 of this document.

New meter entries are uploaded to Portfolio Manager once per month. There may be a lag time between receiving your monthly PG&E bill and seeing the new data in Portfolio Manager. If it has been more than one month and your meter data has stopped updating, please contact PG&E.

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

To benchmark, you will need to obtain energy use data for all of the meters in your building(s). To configure Web Services, use the Meter Number located on each physical meter at your property. To receive data for each meter, you will need to authorize PG&E to release your own data to Portfolio Manager. You also need to have each tenant, or PG&E customer of record, complete the Portfolio Manager Web Services Data Authorization form to release the data to the Property Owner for each meter. This form is available online (as of December 2013) or as a PDF, both versions can be found on the PG&E Benchmarking Web site (www.pge.com/benchmarking). The customer of record may submit the online form directly online. The paper form must be completed and signed by the customer then emailed to benchmarking@pge.com. There is no confirmation of receipt of the Portfolio Manager Web Services Data Authorization form.

NOTE: The Portfolio Manager account must be created and shared with PG&E before the customer authorization process is completed.

Why did I receive less than one year of meter data when I signed up for Web Services?

For meters that have been successfully connected, PG&E will populate up to three years of energy data for that meter, with the following exceptions:

- Meter has existed less than one year: If the meter has existed for less than one year, and you are receiving an error that the meter has less than one full year of energy data, you need to correct the **Date the Meter became Active** field. On the **Meters** tab, select **Edit Basic Meter Information** under the **Action** menu. Update the **Date the Meter became Active** field to the correct date. This will disable the "full year of data" verification.
- Change in Customer of Record: In order to protect customer privacy, PG&E will not send meter entries that were billed under a previous Customer of Record.
- Existing meter entries: If you have manually input entries for the meter before authorizing Web Services, PG&E will only populate additional entries following the most recent one that you entered. For example, if your last entry was for September 1 through October 1, PG&E will only provide data starting after October 1. This prevents the creation of duplicate meter entries and ensures that you do not accidentally lose any of your previous work.
- "Date Meter became Active" field is incorrect. This is a new field in Portfolio Manager. Some meters shared previously under the now-obsolete ABS system are incorrectly populated, preventing the full three years of history from populating. Under the **Meters** tab, select **Edit Basic Meter Information** under the **Action** drop-down menu. Make sure the **Date Meter became Active** field is set to a date more than three years ago.

Why have my meters stopped updating?

For meters that have been successfully validated, PG&E will update the meter with new entries as new billing data becomes available, with the following exceptions:

- The meter becomes inactive. If it is reactivated under the same customer, it will start updating again.
- The customer of record for the meter changes. To continue receiving new meter entries, you will need to reshare the meter with the most current Service ID number or Meter Number. While the Meter Number has not changed, Web Services will not update the meter until the Meter Number is re-entered and **Exchange Data** is requested.

There may be a short lag time between receiving your monthly PG&E bill and seeing the new data in Portfolio Manager. If, after one month, your meter data has stopped updating and you do not believe the above reasons apply, please contact PG&E.

Why am I getting an "overlapping meter entries" error message?

Portfolio Manager requires that meter entries do not overlap by more than one day. You may be getting this error for one of the following reasons:

• Before signing up for Web Services, you had previously entered meter data manually and the start and end dates did not accurately match the meter read cycle. For example, if you entered 1/1/12–1/31/12 when the actual meter reading was for 12/25/11–1/24/12, you will want to correct this by editing the meter entry start and end dates.

• The meter had a bill that was rebilled either due to an error or an estimated bill. Web Services will update the meter with the new bill, but the previous bill will not be removed. To correct this, delete the original bill entry that was corrected. If you are not sure which entry to delete, contact PG&E.

Why doesn't my building have an ENERGY STAR® score?

To find out why your facility does not have a score, click on the link that says "N/A" in the box titled **Weather-Normalized Source EUI (kBtu/ft^2).** For a more detailed explanation, refer to the Portfolio Manager Help Web page.

If the customer of record changes for a meter associated with my property, how do I continue to get data uploads for that meter?

If the customer of record changes for a meter (ie. a tenant moves out of a location, and a new tenant moves in), PG&E will stop uploading the usage information for the meter, due to data privacy concerns. In order to continue data upload for this meter, the Portfolio Manager customer must reshare the meter with the new Service ID assigned to the new customer of record. Please see section 5.3a of the Benchmarking Guide for instructions on how to reshare the meter(s).

What building types are eligible to receive an ENERGY STAR score and what is required to earn the ENERGY STAR label?

There are more than 15 “ratable” space types eligible to receive an ENERGY STAR score of 1-100. A ratable building that receives a score of 75 or higher may be eligible to receive an ENERGY STAR label provided that certain other criteria are met.

There are more than 50 additional space types for which EPA provides weather-normalized national average energy use intensity (EUI) for comparison purposes.

Space types that do not qualify for either a 1-100 rating or a weather-normalized national average EUI can still use Portfolio Manager to calculate a weather-normalized EUI. This metric allows a property to measure and track its own energy performance over time.

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” and be billed for the 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 in Portfolio Manager via Web Services will reflect only this net amount. The meter does not record the output of the on-site system. Portfolio Manager requires that net energy meters be entered as two separate meters:

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

Why is Pacific Gas and Electric Company not showing up when I search under Add Contacts?

If Pacific Gas and Electric Company does not appear in your search, it may be because you have previously connected with PG&E. To verify whether you are connected, go to "Contacts." Because of the naming convention within Portfolio Manager, PG&E is filed as "**Company, Pacific Gas and Electric"** and will appear under the "C" listings.

If PG&E (Company, Pacific Gas and Electric) is not listed under your contacts, make sure you are searching for "Pacific Gas and Electric". Searching for "PG&E" does not work.

I completed and submitted the Portfolio Manager Web Services Data Authorization form, but nothing has happened. When will the information show up in Portfolio Manager?

The Portfolio Manager Web Services Data Authorization form should be used to get permission from customers to use their meter for Web Services if you are a third party. You will still need to register a Portfolio Manager account, create a facility profile, add meters and enroll the meter(s) in Web Services as described in Sections 1-3. After the meters have been shared with PG&E, have your tenants, or PG&E customers of record, complete the Portfolio Manager Web Services Data Authorization form. There is no confirmation of receipt for this form.

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 PG&E's My Business Web page, 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, log in to your account, then check the **Help** link, located on the top right corner of any screen. Questions can also be emailed to ENERGY STAR. If you have questions or need further help with PG&E's Web Services, please email PG&E at benchmarking@pge.com.

PG&E also regularly offers hands-on benchmarking workshops. To register for upcoming workshops, visit www.pge.com/pec/classes.

Helpful Web Sites

PG&E's Benchmarking Web site: www.pge.com/benchmarking

ENERGY STAR Portfolio Manager Login page: www.energystar.gov/portfoliomanager

PG&E's My Business Web site: www.pge.com/mybusiness

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