Benchmarking with Customer Portal Guide

Connecting your Energy Star Portfolio Manager account to the District Energy Customer Portal will automatically transfer your data for benchmarking purposes. Only one representative from your building needs to complete this process.

If you have questions, please contact the District Energy team at 651-297-8955 or **portalhelp@districtenergy.com** Additional resources are on the **District Energy website**.

Add Property to Energy Star

Before you begin, add your property to **<u>Energy Star Portfolio</u>** <u>**Manager**</u>.

Combine Building Meters - If You Have Heating & Cooling

If you have heating and cooling services, you must combine meters. First, link your accounts in each building, see page 2 of the **User's Guide** for instructions.

To combine building meters, go to the top left **Select Property** tab.

At the bottom of the property list, click **Add New+**.

In the pop up menu, name the meter group "Building Name Energy Star."

Select all of the heating and cooling meters for the building and click save.

Energy Star Connection and Sharing

In the Customer Portal, go to the

Benchmark tab. Click **yes**, I want to transfer data to an existing building in my Energy Star account.

Search	٩
₿,	Account# DEMO99DC Demo Building 1234 Park Place Bivd 99999A, ST PAUL, MN 551 Edit Delete
₿,	Account# DEMO99DE Demo Building 1234 Park Place Blvd 99999A, ST PAUL, MN



Charts	🗎 Data	@ Benchmark	Energy Efficiency Program	Portal & Customer Resources	↑ 39% from 90 day average	↑ 7% from previous
ENERGY STAR	Markers	Customized En	ergy Goals			
1234 ST PA	Park Place Blvd 9999 UL, MN 55102	99A	energy star PortfolioMana	ger∞		
Details Name Primary Use Total Sq Ft % Occupied Year Built Select your put profile details	Demo Building Energy ==Choose Property Ty 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	y Star ppe== v v v and edit your	Link to an existing ENER Yes, I want to trans in my ENERGY STA Link this property to an e 1. First, from your services accour Request Con Check for My 3. From your ENEF would like billin Initiate Sharri	GY STAR Portfolio Manager accor sfer data to an existing property. R account existing ENERGY STAR Portfolio M Portfolio Manager account, you n it Contact nection below to have your ENERGY STAI Contact Request AVS STAR Portfolio Manager acco g data to transfer - requires Share 19	unt and property? O No. I want to characteriz benchmarking here Manager Property to initiate auto nust request to Connect with the R Contact connection request an unt, now select to enable Shariri Properties for Exchanging Date	e my property and manage mated data tranfer: : District Energy St. Paul web :cepted ig for the Property where you to be completed
			4. Toggie control i	ith Property ID	Property to and initiate meter o	

ISTRICT ENERGY

Selecting 1 to **Request Connection** will open a new tab in your browser asking you to sign in to your Energy Star Portfolio Manager account. Once signed in, you will see this screen:

	nomunugoi			
Send a Conn Exchanging [ection Requist to <u>Ever</u> Data	-Green Energy Distric	t Energy St.	Paul to Fegin
Ever-Green Energy Distri how to complete this info individual properties and/	ct Energy St. Paul requires the following in rmation, please contact Ever-Green Energ or meters with them to get started exchan	formation in order to exchange data with <u>v District Energy St. Paul</u> . Once your cr ging data.	n your property(ies). If onnection request has	you have any questions about been accepted, you can share
Terms of Use:	None Provided			
Agreement:	gree to my provider's (Ever- hergy <u>St. Paul</u>) Terms of Us	Green Energy District 9.	Send Conn	ection Request

"Ever-Green Energy District Energy St. Paul" is correct.

Check the **agreement box** and then the button for **Send Connection Request**.

Navigate back to the Customer Portal tab in your browser. Under item 2 select **Check for My Contact Request**. This will automatically accept the connection request and a small green check mark will appear briefly.



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On the Benchmarking page, under item 3 select **Initiate Sharing** which will open a second Energy Star tab. You will see this screen:



In item 1, Ever-Green Energy District Energy St. Paul (EverGreenEnergy) should auto-fill.

For item 2 click the **Select Properties** button and choose the property. Scroll down and click **Apply Selection**.

For item 3, choose **Bulk Sharing** (Simple Option) and then **Exchange Data Full Access**.

Select Authorize Exchange.

While in Energy Star, copy your **property ID number**. In MyPortfolio tab, in the Dashboard section, you can find the **property ID** below the property name.

MyPortfolio	Sharing	Reporting	Recognition						
	Properties (2	2)	Dashboard				Searc	ch by ID or Name	_
Defrech to	Add a Property	Trond	It has been current metr	over 90 ics.	I days since you last r	refreshed "Energy Higi	hlights." Please g	afresh to see your	
Refresh to	see source EU	Trend	View All Prop	erties	(2) ¥ Energ	gy Highlights	✓ R ⁱ	fresh Metrics	
/ Change M	etric		Add/Edit/Dele	te Gros	ups Add/E	dit/Delete Views			
			Name	-	Energy Current Date +	ENERGY STAR + Score	Site EUI (kBtu/ft²)	Source EUI (kBtu/ft²)	
			Demo Bu 09845268	ilding					

Navigate back to the Customer Portal tab in your browser. In the Customer Portal Benchmarking screen, toggle the bar to **Link with Property ID**.



A box will pop up asking you to enter the property ID number from Energy Star.

Establish Automated Benchmarking	ENERGY STAR Portfolio Manager
SUBMIT - Cancel	Property Id: 16731950 Property Name: Sample Office (US)
When you select submit, a	Address: 123 Main Street, Arlington, VA, 222
new screen will appear and	Primary Function: Office
ask you to verify the property.	Is this your property?
Confirm the information is	YES 🗸
correct and select yes .	

A final confirmation screen will appear to verify meters. Confirm the information is correct and select **submit**.

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Adjusting Energy Star Meter Dates

Once the connection is complete, go back to Energy Star to adjust meter dates. In MyPortfolio, click on your property and then select the Energy tab.



In the Energy tab, scroll down to see the property's meters. The **Name Meter ID** should match the meter numbers in your Customer Portal account.

Click on the meter name to expand the Basic Meter Information section.

Meters - Use <u>Change Meter Se</u> A <u>View as a Di</u> e	ed to Compute Metrics (3) <u>elections</u> ag <u>ram</u>		Add A Meter
Name Meter ID	Energy Type 💠	Most Recent Bill Date	In Use? (Inactive Date) 🗘
88888 090492087	District Hot Water	11/30/2021	Yes
<u>9999999</u> 970271426	District Chilled Water - Other	11/30/2021	Yes

Data from the Customer Portal starts on November 30, 2017. If your meters have data before that date, you will see a warning/ error message.

To adjust the meter dates, change the **Date Meter became** Active from 12/31/17 to 11/30/2017. Then click Save Changes. You will need to adjust the meter dates for each meter.

The date that the meter became active ese bills provided (i.e., any bills before	a which you have entered for 9 (12/31/2017) is after the first bill you have the first bill date for this meter) will not be used in your metrics.	entered for this meter. If you cont
ar Selection: 00000 000452607		
80000 - 050432007		
Basic Meter Information (***c	ick on the arrow to the left to expand this section	
Name:	* 00000	× Delete
Meter ID:	00000	
Type:	Distruction Water Need to change?	
Units:	* MBtu/ MMBtu/ Dth (million Btu/ dekatherm) 🗸	
Date Meter became Active:	* 11/30/2017	
	Still In Use	
Date Meter became Inactive:) shake	
Is this an Aggregate Meter?:		
	0.63	
Custom Meter IDs	None 🕂 Add Another Custom Meter ID	

Delete or Deactivate Previous Meters

If you have manually entered data for District Energy St. Paul meters, you will need to deactivate or delete those meters.

For data before November 2017, deactivate the meter as of **11/30/2017**. Select the old meter name to get to the Basic Meter Information and uncheck the **Still In Use** box and enter **11/30/2017** as the **Inactive date.**

If your meter data is newer than 2018, delete the meter.