



Benchmarking Fact Sheet

Multiple Properties and Meters

This document is a supplement to the PG&E Benchmarking “[How To Benchmark Your Building Guide](#)” (abbreviated as “How To Guide” in this document). This supplement is useful when benchmarking a large portfolio of properties/meters that are all associated with one Customer of Record with PG&E (e.g. School Districts, Cities, Counties, and State Agencies). You should plan for this process to take about 3-4 weeks.

Before beginning the process, we suggest you collect the following information:

- List of properties to benchmark (including address and square footage) – other data can be collected such as # of computers, however you can use Energy Star default values instead
 - List of meters to benchmark – for each meter, you will need the Service Agreement ID, service type (electric or gas), and meter location (which property it belongs to)
1. Create a Portfolio Manager (PM) account in [Energy Star™ Portfolio Manager \(ESPM\)](#) and connect to PG&E – see Sections 1 and 3 in the “[How To Guide](#)”.
 - a. Create a unique PM account for the Portfolio being benchmarked (ie. School District or City) – this makes it easier when requesting mass data release authorization (step #7), and transferring control of the Portfolio to other users, if required.
 - b. The email address used for connecting to PG&E should be for the person responsible for setting up the Portfolio and initiating energy data upload with PG&E. This email address can be changed later if required.
 - c. You should receive an email when the PM account is connected to PG&E (within 1 business day) – you cannot share properties/meters with PG&E until connected to PG&E.
 2. Add properties to be benchmarked in ESPM. There are 2 options:
 - a. Add manually (see “[How To Guide](#)” Section 2) – good for smaller number of properties, or if you don’t already have property/meter data set up in a spreadsheet, or
 - b. Spreadsheet upload – good if you already have a property list set up in spreadsheet, and you are comfortable working with data uploads: <http://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-add-properties-spreadsheet>
 3. Add meters to each property in ESPM. There are 2 options:
 - a. Add manually (see “[How To Guide](#)” Section 2), or
 - b. Spreadsheet upload - <https://portfoliomanager.energystar.gov/pm/dataimport/createTemplate> Use the “Add Meters to Existing Properties” template – good if you are comfortable working with data uploads
 - c. We recommend setting the “Meter Name” for each meter to the Service Agreement ID, as this will make the sharing process easier (Step 4).
 4. Share the property/meters with PG&E in ESPM – Refer to “[How To Guide](#)” - Section 3
 - a. Can share properties individually or all at once – select the “Full Access” circle for each meter, put an “S” in column 1 and copy Service Agreement ID from Meter Name to column 2



- b. Your sharing request is pending if you see a “Green Bar” at the top of screen indicating sharing is pending. The pending share requests will also show in the notifications section in ESPM.
5. Will receive sharing results email with 1-2 business days.
 - a. If you receive “The meter has been validated, but authorization for data transfer not provided” sharing status for each meter, you are ready to submit data release authorization form (Step 6)
 - b. If you receive any other error on a meter, refer to “[How To Guide](#)”, Section 5. Fix error, then unshare/reshare property/meter “How To Guide” – Section 6.
6. Submit Data Release Authorization Form for mass authorization:
http://www.pge.com/includes/docs/pdfs/mybusiness/energysavingsrebates/analyzer/benchmarking/PMWS_DataAuthorizationForm.pdf to benchmarking@pge.com. In email, please indicate the PM account (PM Username) that data release authorization applies to (as created in step #1). PG&E benchmarking team will extract a report of all Service Agreement ID’s shared with PG&E via the PM account, and attach to the form.
7. Mass Authorizations are performed each Thursday. You will receive an email when the authorization is complete.
 - a. Data release authorization is done for a meter to a specific property in ESPM. If you decide to change or correct which meters are uploaded to which properties at a later date, you will need to perform another data release authorization for the meter.
 - b. Individual data release authorizations can be performed online at this link: <http://www.pge.com/en/mybusiness/account/diy/cisr/index.page> If new meters/properties are added after the mass data release authorization, this is the recommended way to authorize. This authorization is posted real time.
8. If you require quick energy data upload, you will need to unshare/reshare the properties and meters – refer to “[How To Guide](#)” – Section 6.
 - a. This process will initiate energy data upload within 1-2 business days. You will receive an email when the share process runs (a message of “meter has been successfully shared with PG&E” indicates a success energy data upload for the meter).
 - b. If you choose not to unshare/reshare, energy data upload will automatically occur when the meter(s) bill again (make take up to one month).