

How to Benchmark Your Building

Instructions for Using ENERGY STAR® Portfolio Manager® and BC Hydro's Web Services

Version 2, November 2019



Contents

- Overview3
- Section 1 | how to register a portfolio manager account..... 4
- Section 2 | how to create a property profile7
- Section 3 | how to enroll in bc hydro’s web services 15
- Section 4 | key features of bc hydro web services25
- Section 5 | changing web services authorizations:
 share additional properties and meters,
 share a new meter, remove permissions,
 or re-setting an existing meter share26
- Section 6 | troubleshooting32
- Section 7 | frequently asked questions (FAQs)34

Overview

This document is a quick-start guide for entering your property into Portfolio Manager® and enrolling in BC Hydro's Web Services. For additional help, we suggest you refer to :

- Natural Resources Canada benchmarking webpage <http://www.nrcan.gc.ca/energy/efficiency/buildings/energy-benchmarking/3691> or email your question to info.services@nrcan-rncan.gc.ca
- US Environmental Protection Agency Energy Star Portfolio Manager webpage <https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager> and online helpdesk at <https://portfoliomanager.zendesk.com/hc/en-us>.

For technical questions related to BC Hydro Web Services email your Portfolio Manager property ID and Meter ID and your BC Hydro Account number, last bill dates and bill amount and description of your issue to PMWebservices@bchydro.com

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 BC Hydro's Web Services.

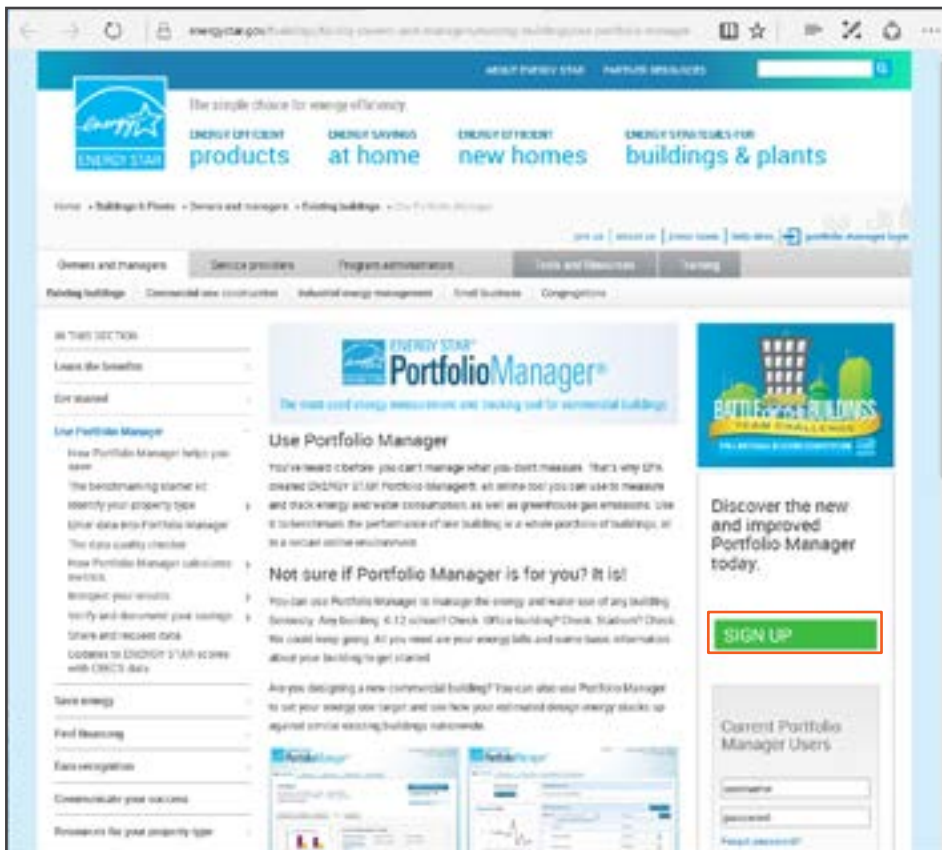
The troubleshooting section can help you identify and correct problems you may encounter with BC Hydro's Web Services. You will also find detailed answers for many frequently asked questions at the end of the document.

Before getting started, you may want to collect information about your building using the Data Collection Worksheet available on EPA's ENERGY STAR Portfolio Manager Benchmarking Web site:

<https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager>

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 a red asterisk) and click Create My Account, which appears at the bottom of the screen, after the security questions used to recover your account.

ENERGY STAR® Portfolio Manager®

Help | Login
Language: English | Français

Already have an account? [Sign In Here](#)

Create an Account

Accessing Your Account

Username: *

Password: *

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

Confirm Password: *

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

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

Phone: *

Country: *

Language:

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

Street Address: *

City/Municipality: *

State/Province: *

Postal Code: *

About Your Organization

Organization Name: *

Primary Business or Service of Your Organization: *

Is your organization an ENERGY STAR Partner? Yes No

Searchability in Portfolio Manager

Can other people search for you and send you a connection request? Yes No

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 "energy@energystar.gov" to your address book to ensure delivery.

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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

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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.

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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.

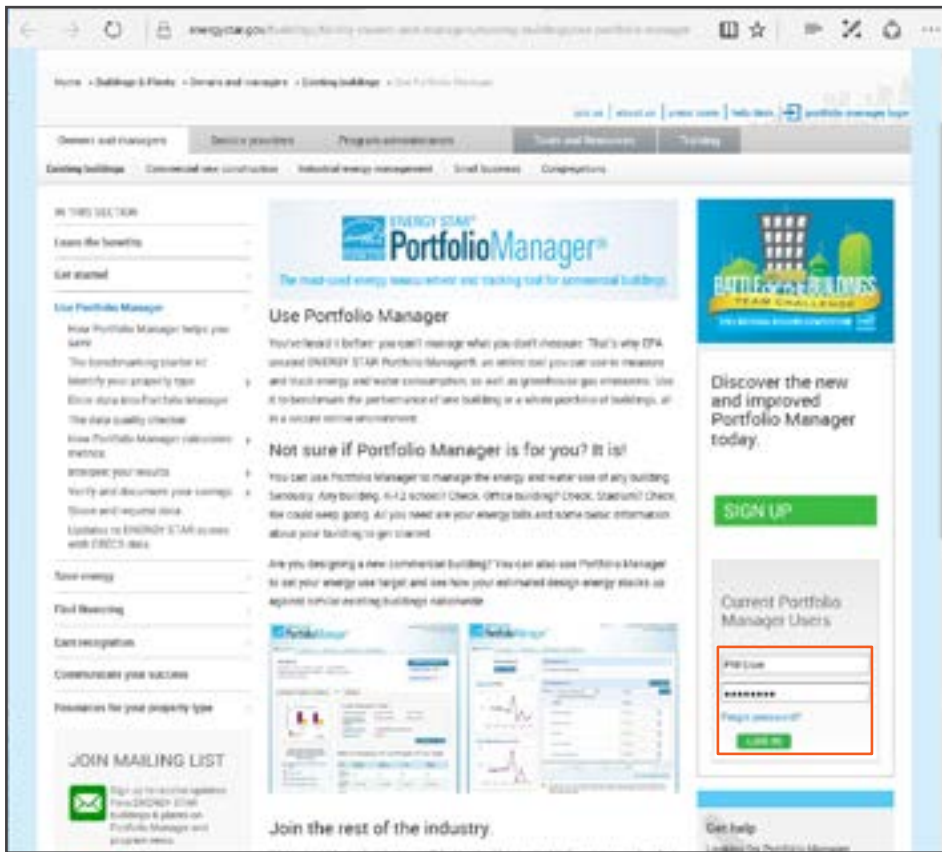
Create My Account Cancel

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Note: Portfolio Manager's default is to enable others to search for your account to facilitate connecting with others. Do not change this Searchability in Portfolio Manager default setting if you intend to enroll in BC Hydro's web service.

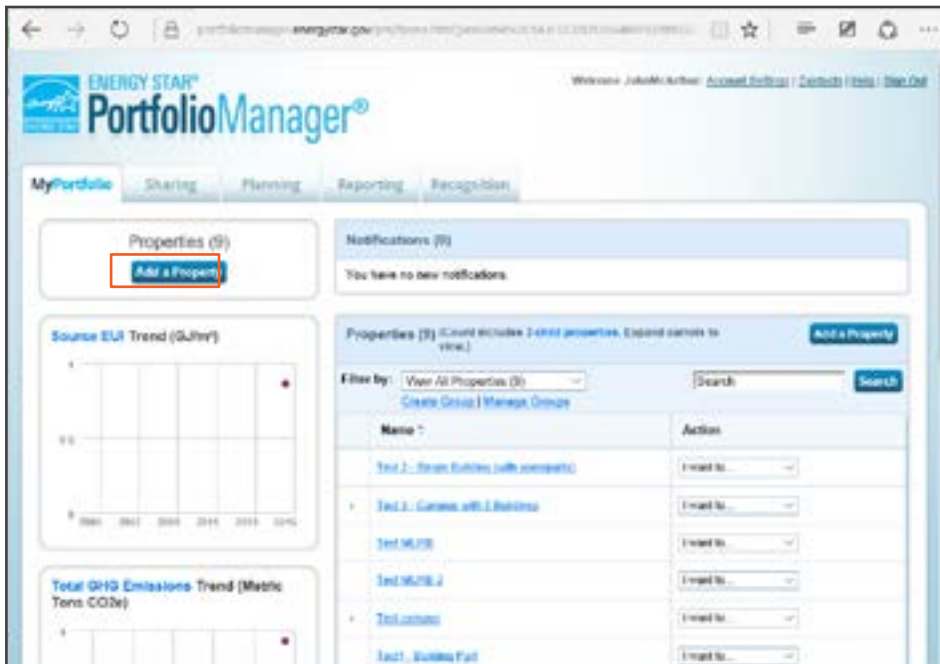
- 1.3 On the Portfolio Manager log in page (www.energystar.gov/portfolio manager), enter your User Name and Password and click Log In. You will be brought to the My Portfolio tab. The My Portfolio tab displays a summary of the properties in your portfolio.



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.

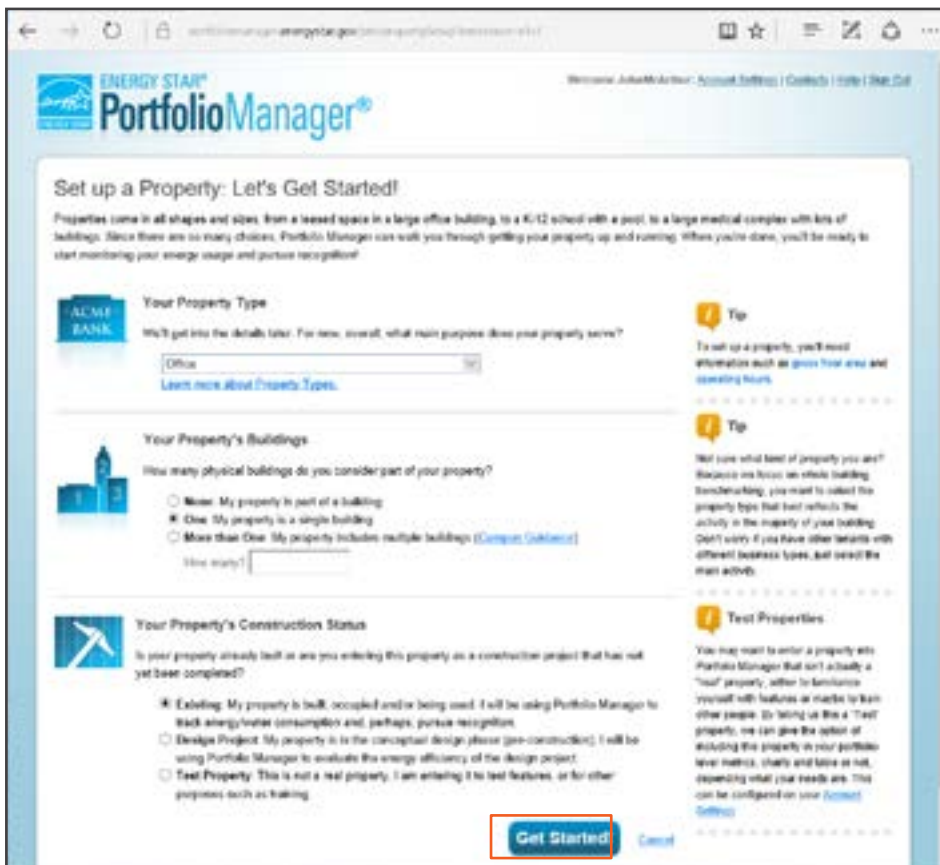
- 2.1 Add a property by clicking Add a Property on the My Portfolio tab. You can also upload multiple properties by clicking the hyperlink at the bottom of the screen.



Tip:

If more than one person in your organization could be creating properties it is better to have one person “own” them and have that person share them with others who are working with the specific properties. See Issue# 3 in Section 6 Troubleshooting for more information.

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.

ENERGY STAR® Portfolio Manager®

Welcome | My Profile | Account Settings | Contacts | Help | Sign Out

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name:

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

Year Built:

Gross Floor Area: Sq. Ft. Temporary Value

Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building. Do not include parking. [Details on what to include.](#)

Irrigated Area: Sq. Ft.

Occupancy: %

Do any of these apply?

- My property's energy consumption includes parking areas
- My property has a Data Center that requires a constant power load of 75 kW or more
- My property has one or more retail stores
- My property has one or more restaurants/catereries

[Back](#) [Continue](#) Cancel

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Tip:

Make sure the city name is accurate and spelled correctly—mistakes may cause an error in connecting with BC Hydro'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 property use by clicking Edit Name next to Office Use, at the top of the next page in this example.

ENERGY STAR PortfolioManager

Welcome | My Profile | Account Settings | Contacts | Help | Sign Out

Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property PB in the tables below to provide more detailed information on how your property is used.

Basic Information

Name:	Test Building	Country:	CA
Property Type:	Office	Address:	1234 AnyStreet Anytown, BC V1A 1A1
Year Built:	2000		
Property consists of:	1 building		

[View P](#) [Edit](#)

[Add Another Type of Use](#)

Building Use [/ Edit Name](#)

Office refers to buildings used for the conduct of commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area (GFA) should include all space within the building including offices, conference rooms and auditoriums, break rooms, kitchens, lobbies, fitness areas, basements, storage areas, stairways, and elevator shafts.

If you have restaurants, retail, or services (dry cleaners) within the Office, you should most likely include this square footage and energy in the Office Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

- If it is a Property Use Type that can get an ENERGY STAR Score (note: Retail can only get a score if it is greater than 5,000 square feet)
- If it accounts for more than 25% of the property's GFA
- If it is a vacant/unoccupied Office
- If the Hours of Operation differ by more than 10 hours from the main Property Use

[More on this rule.](#)

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	30,000 <input type="text"/> Sq. Ft. <input type="text"/>	1/1/2000	<input type="checkbox"/>
Weekly Operating Hours	65 <input type="text"/> <input type="checkbox"/> Use a default	1/1/2000	<input type="checkbox"/>
Number of Workers on Main Shift	115 <input type="text"/> <input type="checkbox"/> Use a default	1/1/2000	<input type="checkbox"/>
Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2000	<input type="checkbox"/>
Percent That Can Be Heated	50 % or more <input type="text"/> <input type="checkbox"/> Use a default	1/1/2000	<input type="checkbox"/>
Percent That Can Be Cooled	50 % or more <input type="text"/> <input type="checkbox"/> Use a default	1/1/2000	<input type="checkbox"/>

This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

[Back](#) [Add Property](#) [Cancel](#)

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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 property use 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 just as you did in Section 2.4.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	140000 sq ft	01/01/2010	<input type="checkbox"/>
Weekly Operating Hours	55 Use a default	01/01/2010	<input type="checkbox"/>
Number of Computers	300 Use a default	01/01/2010	<input type="checkbox"/>

- 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.

Property Use Detail	Value	Current As Of	Temporary Value
Open Parking Lot Size	0 sq ft	01/01/2010	<input type="checkbox"/>
Partially Enclosed Parking Garage Size	0 sq ft	01/01/2010	<input type="checkbox"/>
Completely Enclosed Parking Garage Size	0 sq ft	01/01/2010	<input type="checkbox"/>
Supplemental Hoisting	Use a default	01/01/2010	<input type="checkbox"/>

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.

ENERGY STAR PortfolioManager

Welcome JohnMcArthur Account Settings | Contacts | Help | Sign Out

MyPortfolio | Sharing | Planning | Reporting | Recognition

Congratulations! You have successfully created your property.
Next, you can:
• Add energy use information, so that you can see your energy performance metrics.

Test Building
1234 Anystreet, Anytown, DC 1714 1A1 | Star 3
Portfolio Manager Property ID: 484096
Year Built: 2000

Weather-Normalized Source EUI (GJ/m²)
Current EUI: N/A
Baseline EUI: N/A

Summary | Details | Energy | Water | Waste | Storage

Notifications (0)
You have no new notifications.

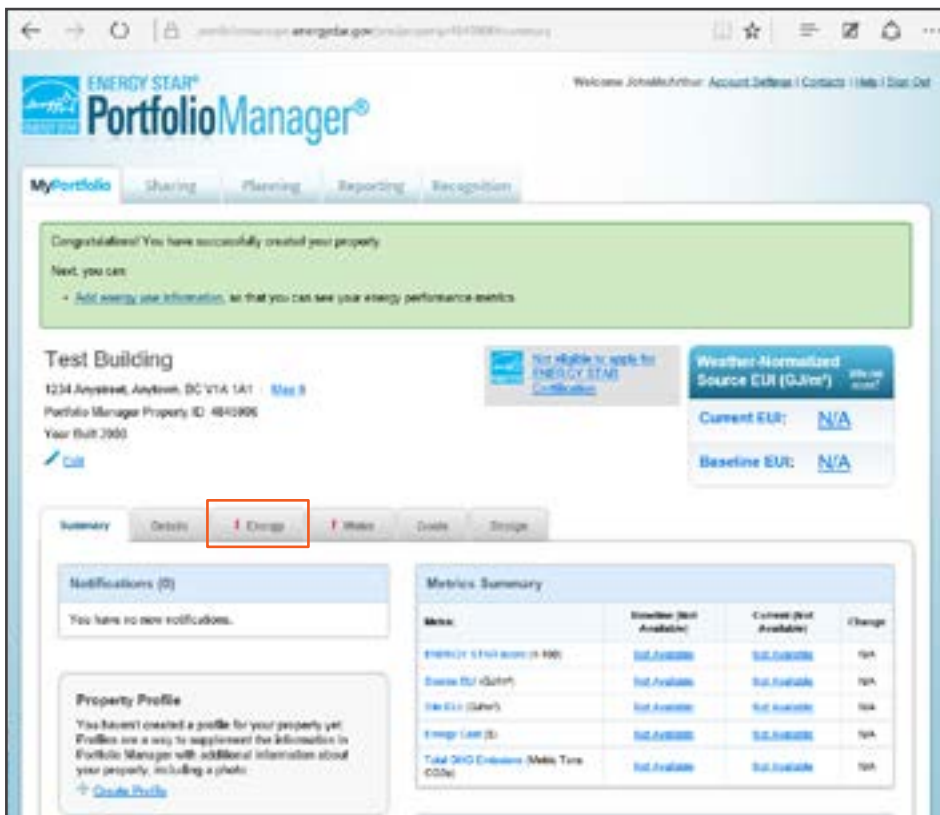
Property Profile
You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about your property, including a photo.

Metric	Baseline (Not Available)	Current (Not Available)	Change
Energy (kWh/m ² year) (EUI)	Not Available	Not Available	N/A
Source EUI (GJ/m ²)	Not Available	Not Available	N/A
Net EUI (GJ/m ²)	Not Available	Not Available	N/A
Energy Loss (%)	Not Available	Not Available	N/A
Total GHG Emissions (Metric Tons CO ₂ e)	Not Available	Not Available	N/A

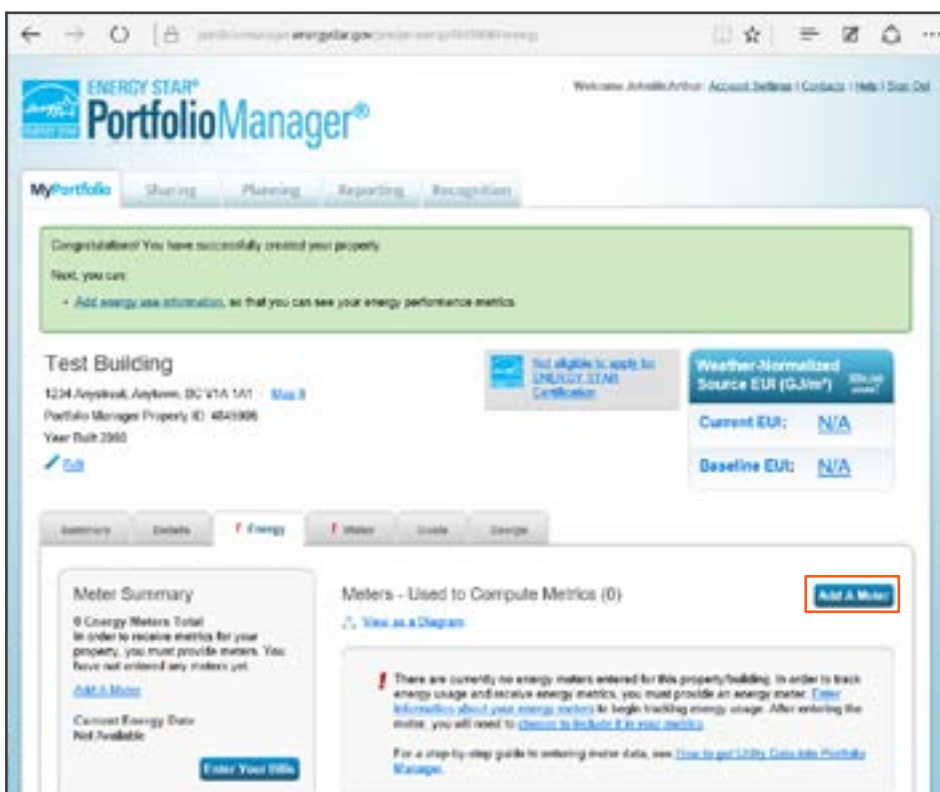
SETTING UP ENERGY METERS

You will need to add an Energy Meter to your property profile for each meter serving the building. For BC Hydro meters that you are signing up for Web Services, add one meter for each BC Hydro Account Number.

- 2.8 To add a meter, you can either click the “add energy use information” link in the green bar, or click on the Energy tab. Either choice will take you to the Energy tab.



- 2.9 Once you are on the Energy tab, click Add A Meter.



2.10 Indicate the sources of your property's energy. As you select different fuels, additional fields will appear. 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 site water consumption will not factor into your benchmark score.

ENERGY STAR® PortfolioManager®

Welcome | MyHome | Account | Settings | Contacts | Help | Sign Out

Get Started Setting Up Meters for Test Building

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.

Sources of Your Property's Energy

What kind of energy do you want to track? Please select all that apply.

- Electric
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Coal (anthracite)
- Coal (bituminous)
- Coke
- Wood
- Kerosene
- Fuel Oil (No. 1)
- Other: _____

Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a new fuel (e.g. gas) and produce your own fuel (e.g. electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More.](#)

Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. [Learn More.](#)

Get Started! Cancel

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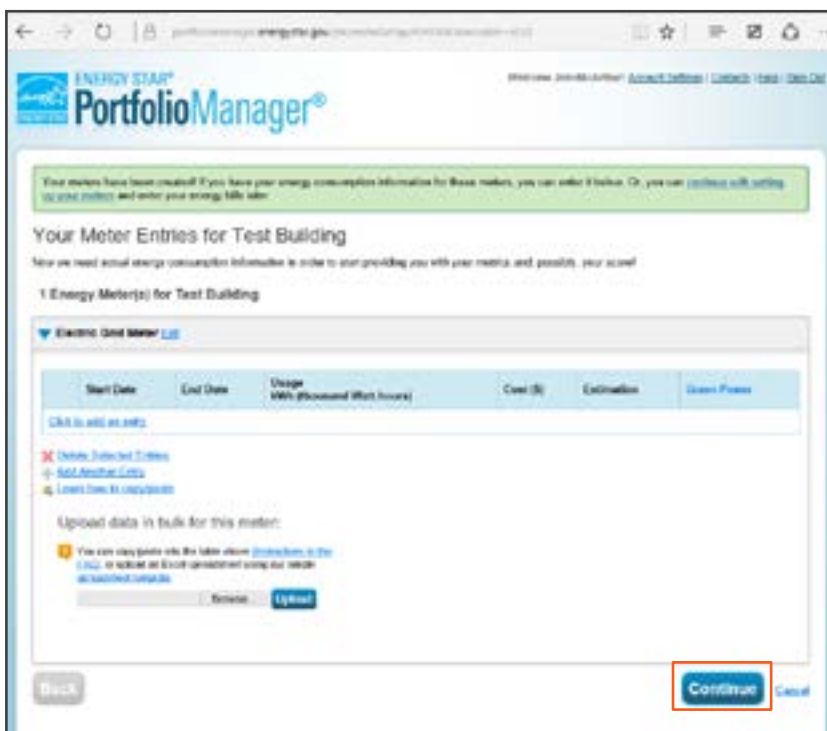
2.11 Indicate the Units for each fuel type by double-clicking in the appropriate field and selecting the correct units in the drop-down menu that appears. Then, enter the date the meter was first billed for each meter, which is normally the date the building was built.

For BC Hydro meters you plan to connect via Web Services, you can use any text. We recommend making the meter name something you can easily recognize later and also add the BC Hydro account number to the meter name for reference, for example “Arbutus Office on Main 000099999” Then click Create Meters.

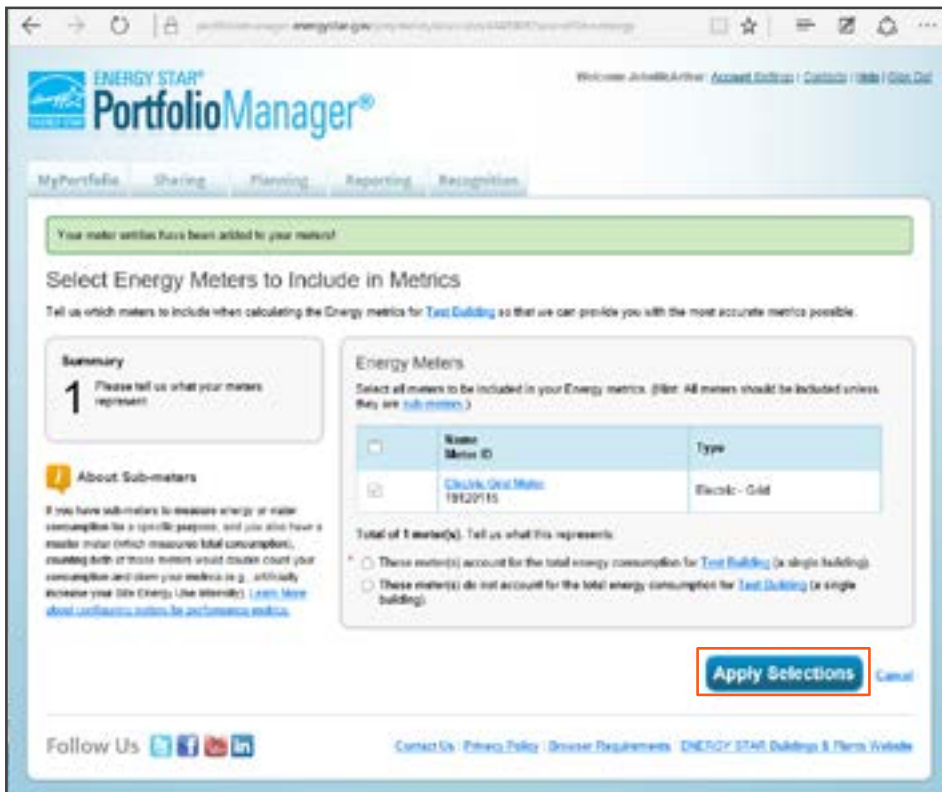
Note: For BC Hydro meters, the units selected for electricity use should be kWh. If you have a consolidated bill, you need to use the Consolidated Account Number for the meter, and you will use the Member Account Number and for the billing data in the following step (see screen shots)



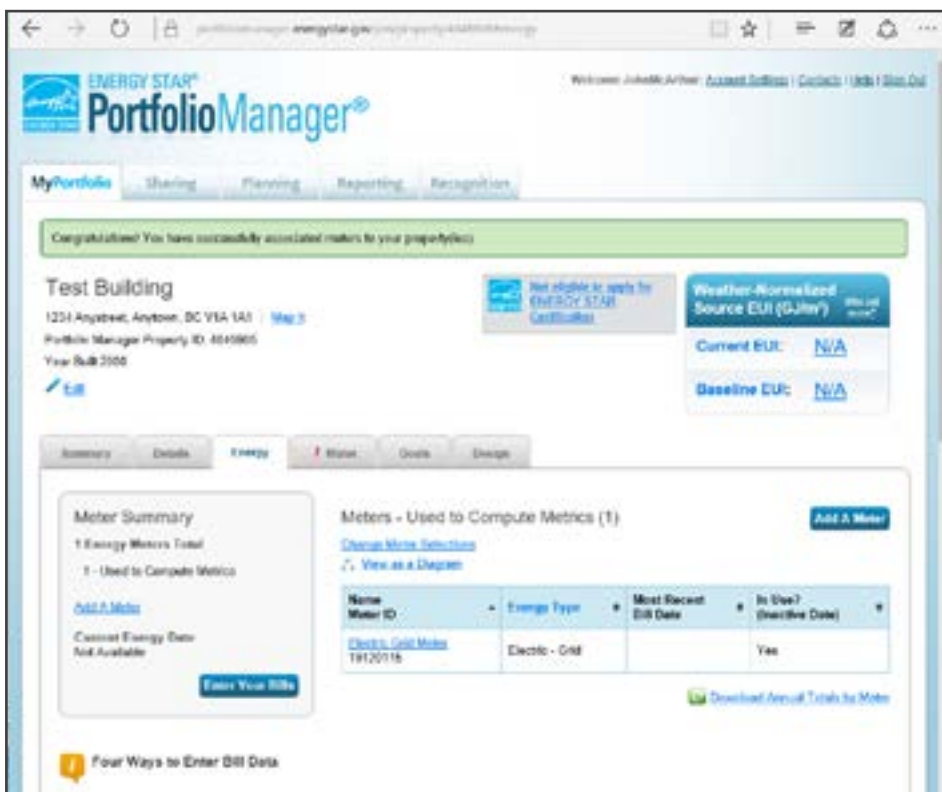
2.12 To add monthly meter entries manually, select “Click to add an entry”. You will then need to enter the billing Start Date, End Date, and Usage for each month. If you have a consolidated account, you will have entered the Consolidated Account Number for each meter entry, and now use the individual Member Account Number for the billing Start Date, End Date, and Usage for each member entry. Adding cost data is optional. Instead of adding data manually, you can 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 BC Hydro’s Web Services to upload your meter’s historical data and usage automatically going forward, simply click Continue.



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. Note: This important step is also often referred to as "configuring your meters". After you have made your selections, click Apply Selections.



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

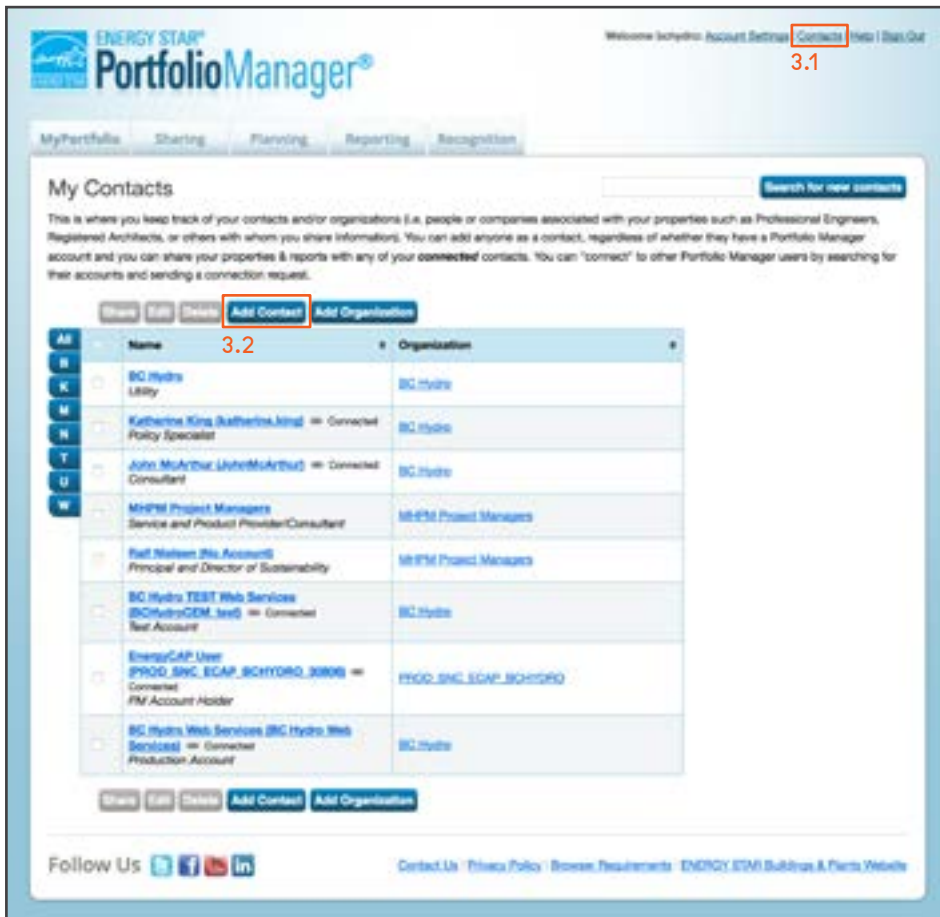


Section 3 | how to enroll in bc hydro's web services

Before enrolling in BC Hydro's Web Services, make sure that:

- All of the meters accounting for the building's total energy consumption have been added to the property profile.
- You have collected the validation details for each meter. You will need your billing Account Number and the Bill Date and Total Cost amount (including cents) from your latest bill.
- The city name is spelled correctly in the address for each property.
- Download your existing meter consumption and cost data into a spreadsheet (for future reference and verification).

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



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

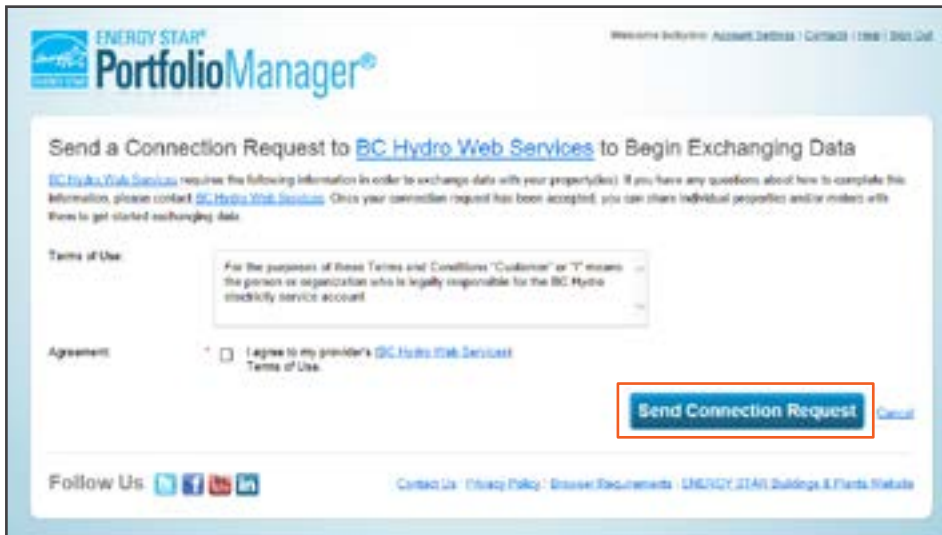
3.3a Search for BC Hydro by entering “BC Hydro” as the Name. Click Search.

The screenshot shows the 'Add Contact' page in the Energy Star Portfolio Manager interface. At the top, there is a navigation bar with 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. Below this, the 'Add Contact' section explains two ways to add a contact: by searching for an existing Portfolio Manager account or by creating a new entry from personal contacts. A search form is provided with fields for Name, Organization, Username, and Email. The 'Name' field is filled with 'BC Hydro Web Services' and the 'Search' button is highlighted with a red box. To the right of the search form, there are three informational sections: 'Connecting with Other Users', 'Keeping Personal Contacts', and 'Organizing Personal Contacts by Organization'.

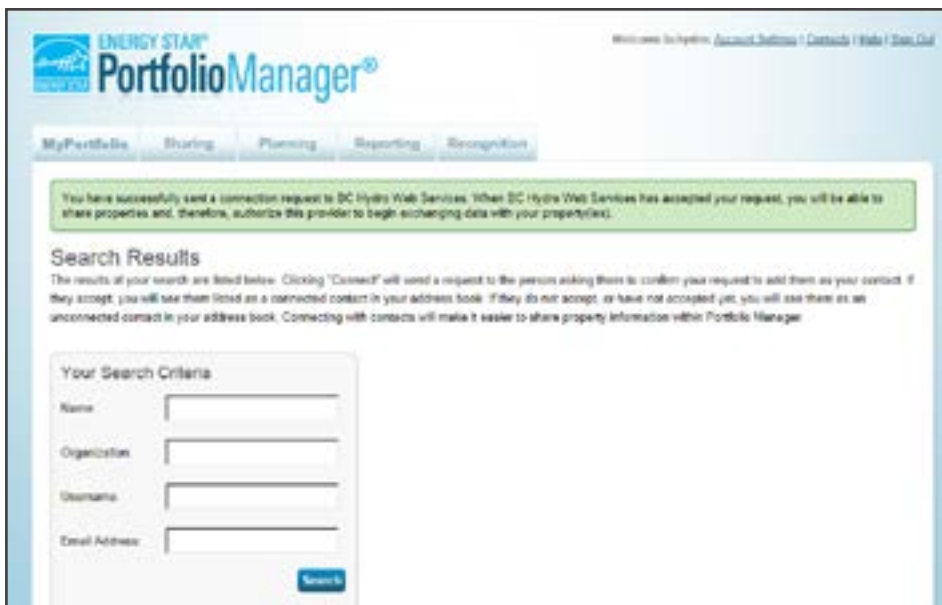
3.3b After the page refreshes, “BC Hydro Web Services” will appear on the right-hand side of the page. Click “Connect”.

The screenshot shows the 'Search Results' page in the Energy Star Portfolio Manager interface. The 'Your Search Criteria' section on the left lists the search parameters: Name, Organization, Username, and Email Address. The search results on the right show a single entry for 'BC Hydro Web Services' with the subtext 'Production Account with BC Hydro'. A 'Connect' button is highlighted with a red box. Below the search criteria, there is a 'Tip' icon.

- 3.4 Next, carefully read all of BC Hydro's Terms of Use. Scroll down, read everything carefully, and agree to the Terms of Use. Finally, click Send Connection Request

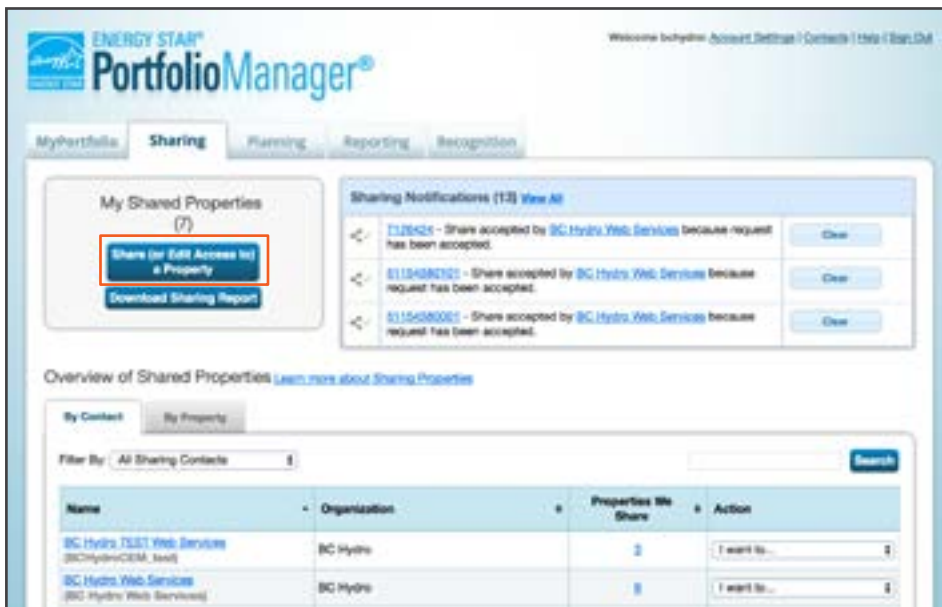


- 3.5 The top of the next page will show a green bar, confirming your connection request was sent to BC Hydro. Note: You are not yet connected to BC Hydro until your request is accepted. You will receive a notification in Portfolio Manager when BC Hydro accepts your request. This process takes up to 24 hours.



3.6 After you have received notification that BC Hydro has accepted your connection request, the next step is to share your property(ies) with BC Hydro through your Portfolio Manager account. Go to the Sharing tab.

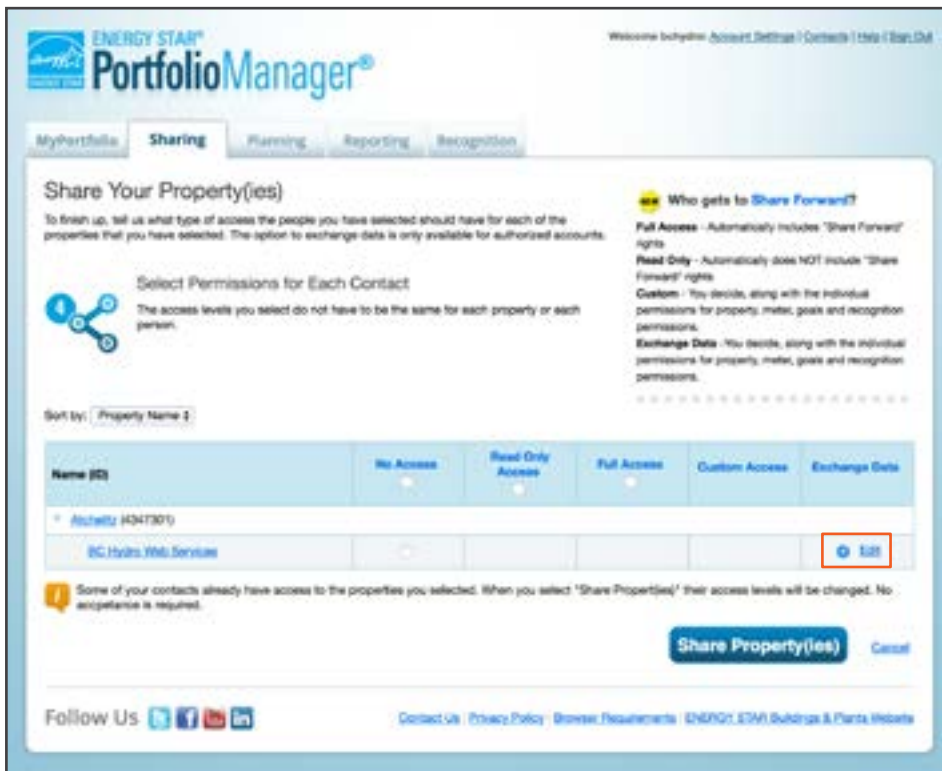
3.7 Click Share (or Edit Access to) a property as shown on this screen.



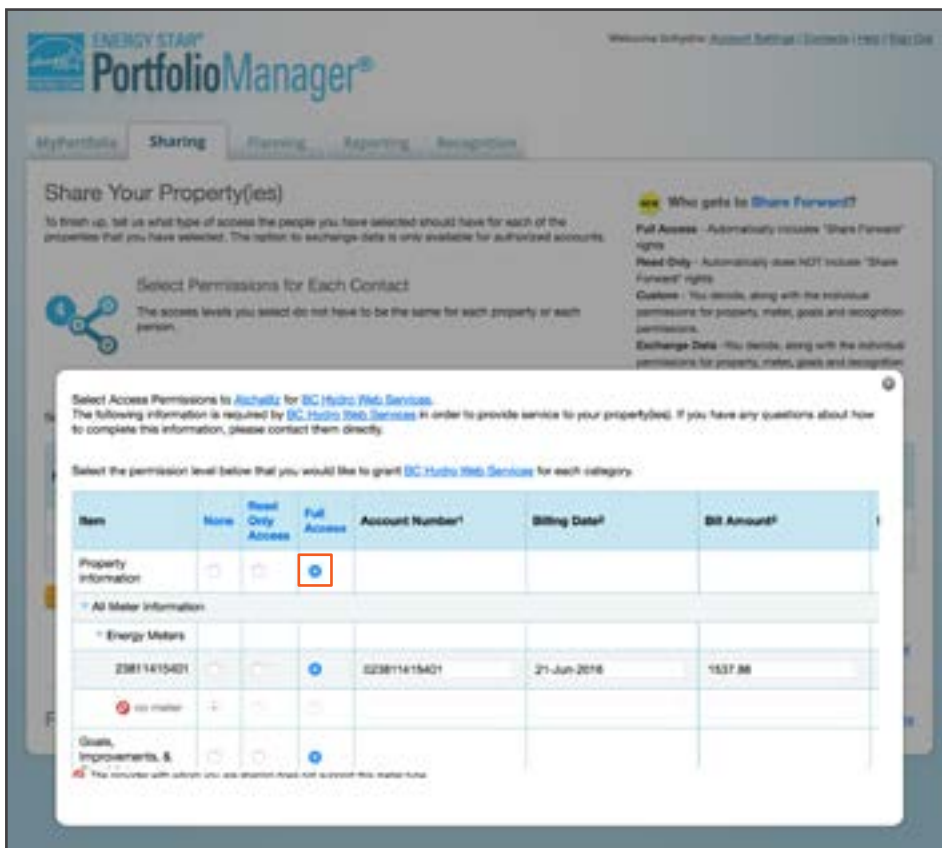
3.8 Next, make your choices under Select Properties to Share. Use the drop-down windows to choose the number of building(s), or group of buildings you would like to share with BC Hydro, and then indicate which specific buildings. Next, under Select People (Accounts) to Share With, highlight BC Hydro as the Account with which you would like to share. Lastly, under Permissions, select the setting for Exchange Data. Click Continue.



3.9a On the next screen, select the Exchange Data radio button and click Edit as the permission level to grant BC Hydro. When you do, a pop up box opens, as seen in the next screen shot.



3.9b For Property Information select FULL Access. Note: This window is longer than it appears here. To see all fields you must scroll down.



3.9c Select your Electric Meters Access to ‘Full Access’ (meters with read only access will be declined by BC Hydro Web Services)
 Then fill in the required validation fields. You will need the BC Hydro Account Number, Last Bill Date and the Last Bill Amount (include dollars and cents) for each meter.

Note the date format is DD-MMM-YYYY, with a three character month and include the dashes – e.g. 21-JAN-2016. Bill Amount must not have any commas or \$ signs and must include cents, e.g. 1999.88

Select full access for each electric meter you would like to connect with BC Hydro. Choose Read Only for Goals, Improvements, & Checklists, as well as NONE for Recognition.

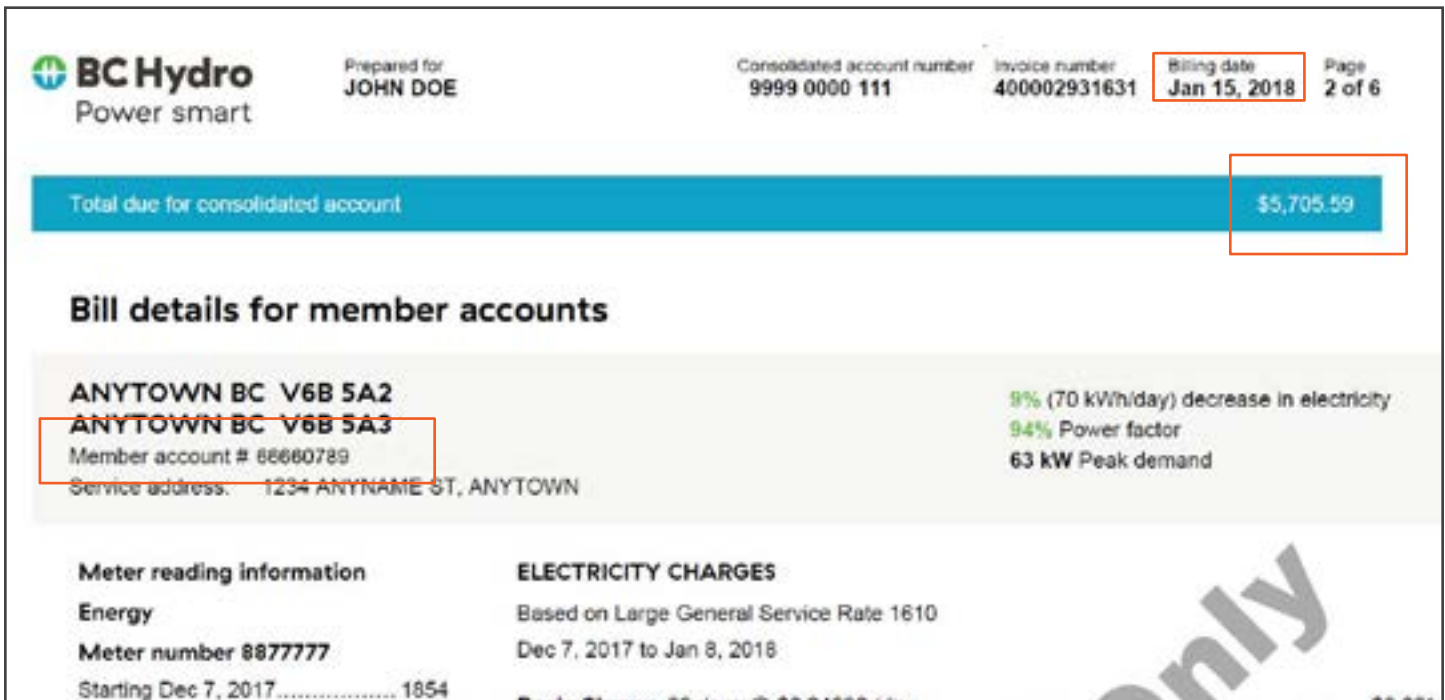
NOTE: If your organization receives a consolidated bill from BC Hydro, in addition to entering each individual account number (“member account number”), you will need to enter MASTER bill date amount or the total consolidated bill amount and the bill date for connection to BC Hydro web services updating.

1. On-line bill example

The screenshot shows a web interface for a BC Hydro account. At the top, there is a navigation bar with 'Account listing' and a dropdown menu showing '#14001514001 Consolidated'. Below this is a dark blue banner with 'Balance owing \$19,996.62' (highlighted with a red box), 'Payment received Jan 19, 2017 \$20,426.78', and buttons for 'Make a payment' and 'Set up auto-pay'. A secondary banner shows 'Jun 21, 2016 Invoice #400002773340' (highlighted with a red box) and links for 'Connection request', 'Go paperless', 'Set alerts', 'Export', and 'View print bill'. The main section is titled 'Master account' with a link to 'View consolidated bill details'. Below this is a 'Member accounts' table with columns for ACCOUNT #, DESCRIPTION, CITY, RATE CLASS, RATE SHEL, and IS CURRENT BILL PERIOD. The first row (7457058) is highlighted with a red box. At the bottom, there is a section for 'Your bill highlights' prepared for John Doe.

ACCOUNT #	DESCRIPTION	CITY	RATE CLASS	RATE SHEL	IS CURRENT BILL PERIOD
7457058	1234 Anyname St	Vancouver	RES	1101	Yes View bill
8326488	155 Small Business Lane	West Vancouver	SGS	1300	No
14520123151	123 Commercial Drive	Vancouver	SGS	1300	No
14520123261	155 Small Business Lane	West Vancouver	LGS	1600	Yes View bill
14520123871	123 Commercial Drive	Vancouver	LGS	1600	Yes View bill
22409200121	155 Small Business Lane	West Vancouver	RES	1101	No
22409200381	123 Commercial Drive	Vancouver	LGS	1600	Yes View bill
22409270193	155 Small Business Lane	West Vancouver	RES	1101	No

2. Paper bill example



BC Hydro Power smart

Prepared for JOHN DOE

Consolidated account number 9999 0000 111

Invoice number 400002931631

Billing date Jan 15, 2018

Page 2 of 6

Total due for consolidated account \$5,705.59

Bill details for member accounts

ANYTOWN BC V6B 5A2
ANYTOWN BC V6B 5A3
Member account # 88680789
Service address: 1234 ANYNAME ST, ANYTOWN

9% (70 kWh/day) decrease in electricity
94% Power factor
63 kW Peak demand

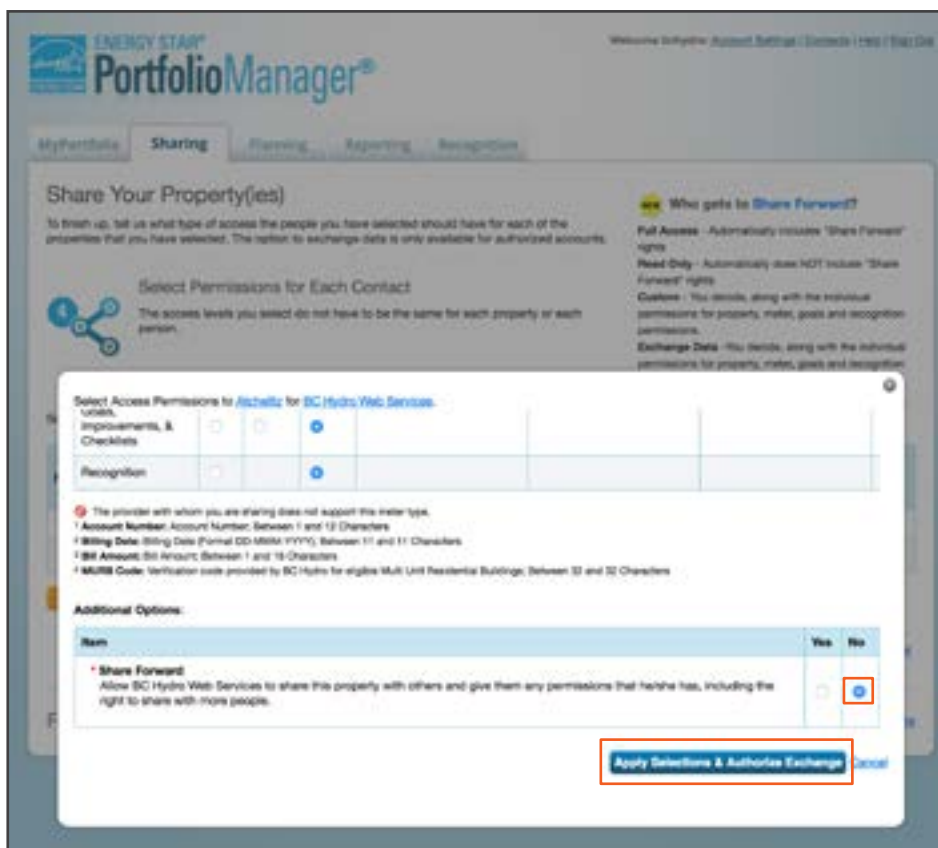
Meter reading information
Energy
Meter number 8877777
Starting Dec 7, 2017 1854

ELECTRICITY CHARGES
Based on Large General Service Rate 1610
Dec 7, 2017 to Jan 8, 2018

Paperless billing is a free service that allows you to view your bills online, instead of receiving paper bills in the mail.

- Sign up for paperless billing
<https://www.bchydro.com/gopaperless>

3.9d Set the Share Forward permission level to NO, then in the bottom right hand corner, click on blue box reading “Apply Selections & Authorize Exchange. The pop up window will now close.



ENERGY STAR PortfolioManager®

Welcome to MyHome Account Settings | Connect | Help | Sign Out

MyPortfolio | **Sharing** | Planning | Reporting | Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Who gets to Share Forward?

- Full Access** - Automatically includes "Share Forward" rights
- Read Only** - Automatically does NOT include "Share Forward" rights
- Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
- Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Select Access Permissions for **Atchultz** for **BC Hydro Web Services**.

Units	Improvements, & Checklists	Recognition
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The provider with whom you are sharing does not support this meter type.

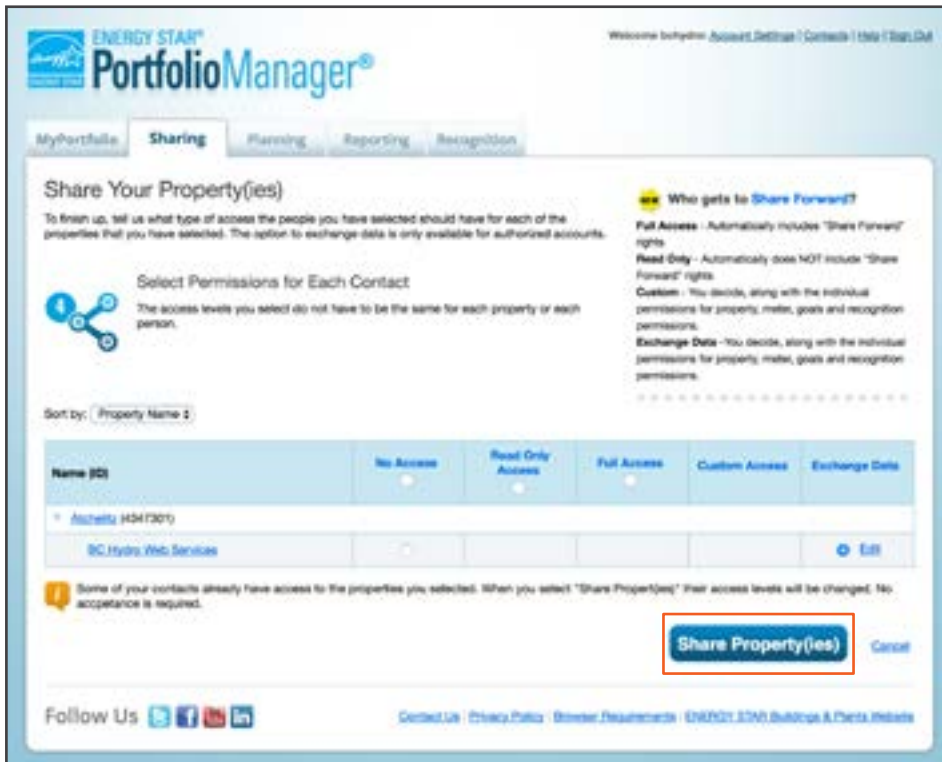
- Account Number:** Account Number, Between 1 and 13 Characters
- Billing Date:** Billing Date Format DD-MM-YYYY, Between 11 and 11 Characters
- Bill Amount:** Bill Amount, Between 1 and 15 Characters
- MURS Code:** Verification code provided by BC Hydro for eligible Multi-Unit Residential Buildings, Between 12 and 12 Characters

Additional Options:

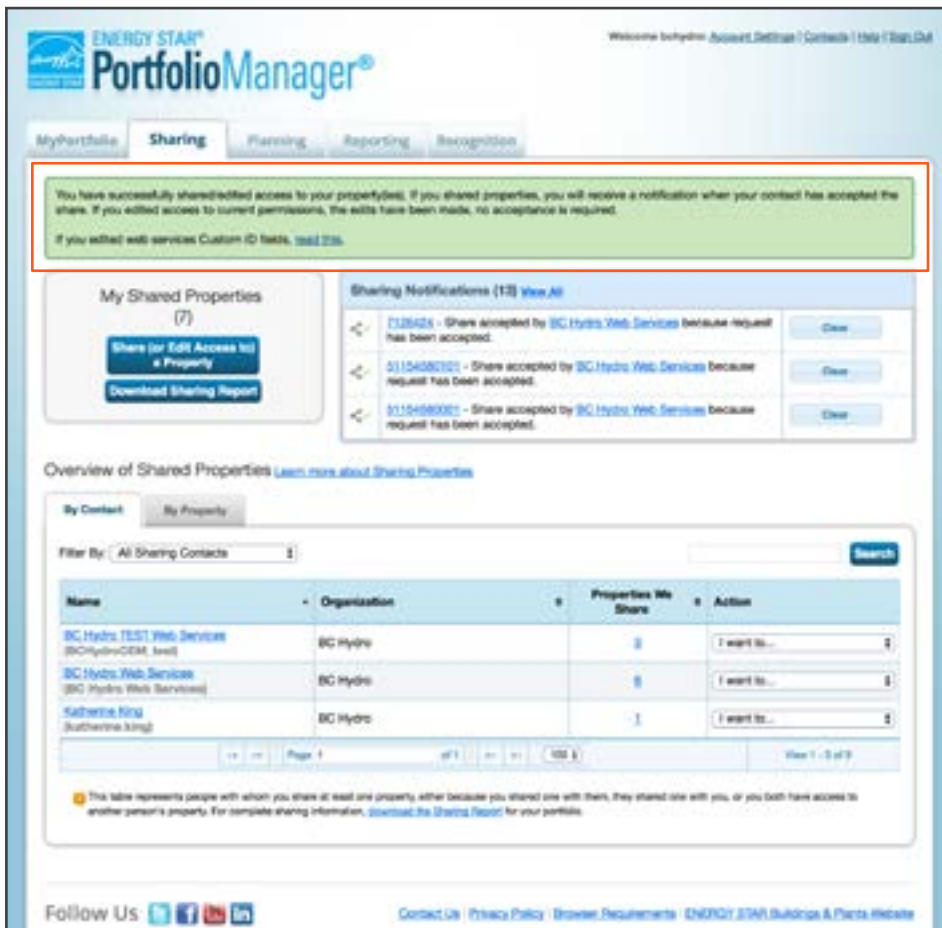
Item	Yes	No
Share Forward Allow BC Hydro Web Services to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Apply Selections & Authorize Exchange

3.9e Finally, it is very important that you select “Share Properties” to complete the process. Until you click “Share Property(ies)”, the selections you entered in the pop up window will not be submitted to BC Hydro.



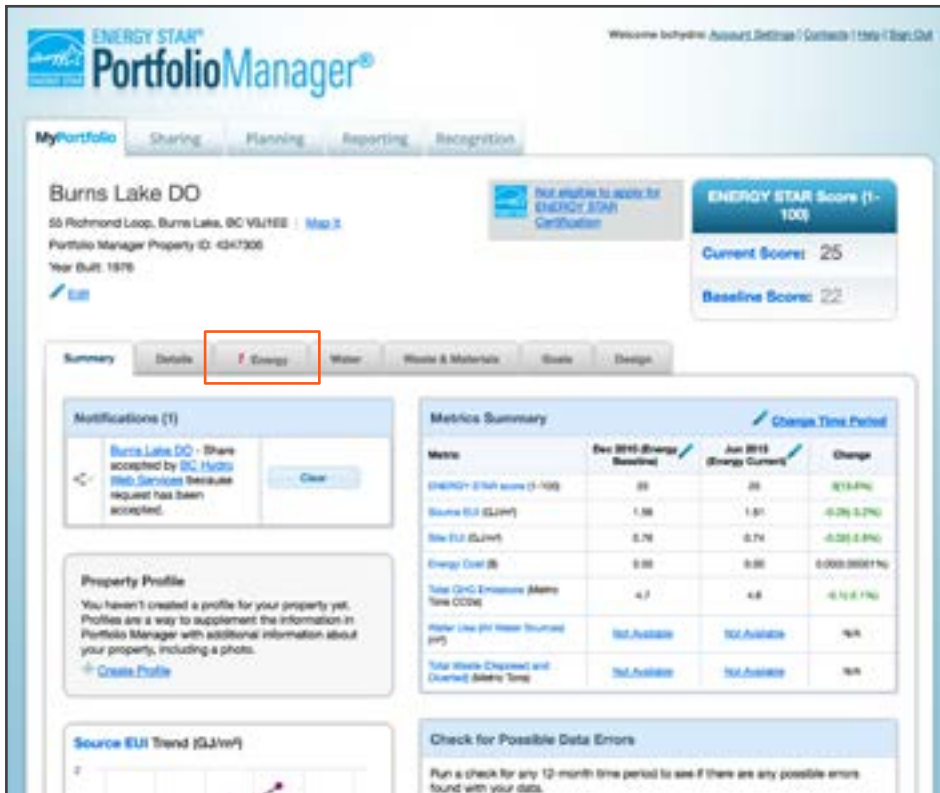
3.10 A green banner will appear at the top of the Sharing tab confirming the request submission. Your request should be processed within 1–2 business days. Each shared meter will receive up to 36 months of historical data (depending on when the account was opened) plus monthly updates going forward.



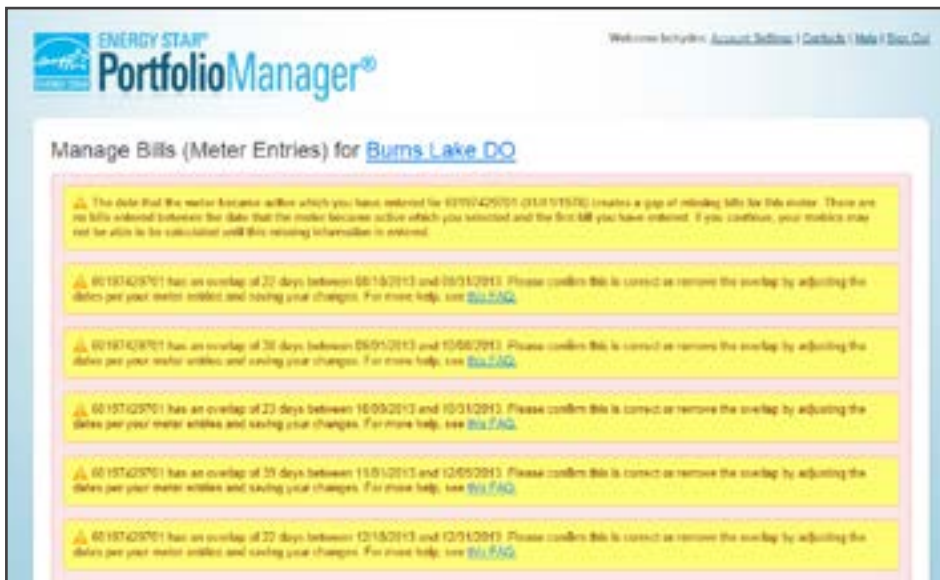
3.11 Review Uploaded Data and Erase Any Duplicates:

For meters that have been successfully shared, BC Hydro will populate up to 36 months of energy data for that meter. Review uploaded data for accuracy and erase duplicates of previous consumption entries you have made:

- 3.11a Go to the screen showing summary data for the property. If there are issues in the consumption data there will be an exclamation mark on the Energy tab. Click on that tab, then on the electric meter.



- 3.11b The displayed consumption entries will have highlighted error messages at the top and in between consumption records.



3.11c Scroll down to the duplicate entries and select the ones you don't want.

<input type="checkbox"/>	8/1/2013	6/30/2013	8,300.82	9.00	<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro
<input type="checkbox"/>	8/1/2013	7/31/2013	8,612.82	9.00	<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro
<input type="checkbox"/>	8/1/2013	8/1/2013	8,612.82	9.00	<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro
<p>⚠ 8/1/2013 has an overlap of 22 days between 8/1/2013 and 8/1/2013. Please confirm this is correct or remove the overlap by adjusting the dates per your meter entries and saving your changes. For more help, see the FAQ.</p>							
<input checked="" type="checkbox"/>	8/1/2013	10/31/2013	2,087		<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro (New Services)
<p>⚠ 8/1/2013 has an overlap of 30 days between 8/1/2013 and 10/31/2013. Please confirm this is correct or remove the overlap by adjusting the dates per your meter entries and saving your changes. For more help, see the FAQ.</p>							
<input type="checkbox"/>	8/1/2013	8/30/2013	8,300.82	9.00	<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro
<input type="checkbox"/>	10/1/2013	10/31/2013	8,612.82	9.00	<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro
<p>⚠ 8/1/2013 has an overlap of 23 days between 10/31/2013 and 10/1/2013. Please confirm this is correct or remove the overlap by adjusting the dates per your meter entries and saving your changes. For more help, see the FAQ.</p>							
<input checked="" type="checkbox"/>	7/30/2013	7/30/2013	0		<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro (New Services)
<p>⚠ 8/1/2013 has an overlap of 29 days between 7/30/2013 and 7/30/2013. Please confirm this is correct or remove the overlap by adjusting the</p>							

3.11d Scroll to the bottom of the page and click Delete Selected Entries

<input type="checkbox"/>	12/16/2015	2/16/2016	7,148		<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro (New Services)
<input type="checkbox"/>	3/17/2016	4/30/2016	8,877		<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro (New Services)
<input type="checkbox"/>	4/21/2016	5/17/2016	3,592		<input checked="" type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro (New Services)

Delete Selected Entries

[Add Another Entry](#) [Download to Excel](#) [Download to Excel](#)

[Learn More for Customers](#)

Upload data in bulk for this meter:

You can upload data in bulk using [the online tool](#) or upload an Excel spreadsheet using our simple [upload tool](#).

3.11e A confirmation box will pop up, click Continue

<input type="checkbox"/>	12/16/2015	2/16/2016	7,148		<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro (New Services)
<input type="checkbox"/>	3/17/2016	4/30/2016	8,877		<input type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro (New Services)
<input type="checkbox"/>	4/21/2016	5/17/2016	3,592		<input checked="" type="checkbox"/>	<input type="checkbox"/>	8/1/2013 BC Hydro (New Services)

Delete Selected Entries

[Add Another Entry](#) [Download to Excel](#) [Download to Excel](#)

[Learn More for Customers](#)

Upload data in bulk for this meter:

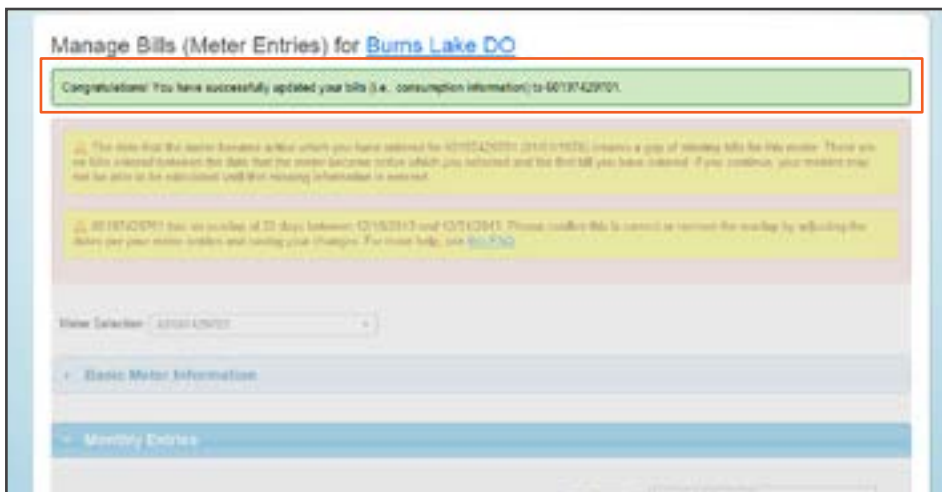
You can upload data in bulk using [the online tool](#) or upload an Excel spreadsheet using our simple [upload tool](#).

You have chosen to delete one or more meter entry from your property. If you continue, this information will be deleted and will not be recoverable. Are you sure you want to continue?

3.11f Click on Save Bills to save your changes



3.11g A green banner will appear confirming your updates. The warnings for the corrected records should disappear (note that in the sample below one error record had not been corrected yet).



3.12 Rejected Sharing Requests

If your meter sharing request is rejected (but the property sharing is accepted), follow the procedure in Section 3.9a to re-submit the meter sharing. If you made a mistake and did not set up the property correctly (e.g. wrong account on the property) you will need to unshare the property (and meter if it was accepted) using the procedure in Section 5.5. Note that you must allow one business day for the unshare to be processed before re-submitting the share request.

Section 4 | key features of bc hydro web services

PAST METER ENERGY CONSUMPTION DATA

- For meters that have been successfully shared and validated, BC Hydro will populate up to 36 months of energy data for that meter (depending on when the account was opened) plus monthly updates (if billed) going forward.

EXISTING METER ENERGY CONSUMPTION DATA:

- BC Hydro's Web Services will not erase or overwrite existing meter entries for dates during the previous 36 months. You will need to remove the duplicate records manually.

MONTHLY UPDATES

- For meters that have been successfully shared and validated, BC Hydro will update the meter with new entries once a month, (if there is a bill for that month). If there is no bill, no updates will be made.
- Future monthly updates will also not erase or overwrite past data.

UNMETERED CONSUMPTION NOT SENT

- Note that unmetered consumption is not sent. If your account consists only of unmetered energy use, the sharing request will be rejected.

DO NOT LINK ONE BC HYDRO ACCOUNT TO MORE THAN ONE PROPERTY

- It is possible to link the same BC Hydro account to more than one property via two separate meters. The system will not reject the second meter sharing request but only one of the meters will be updated with consumption on an ongoing basis.

PROPERTY CHANGES OWNERS

If property ownership has changed, but BC Hydro's account numbers remained the same, monthly updates will continue. However, if the account number has changed, BC Hydro will automatically stop sending monthly consumption updates and the new property owner will have to enter a new meter sharing request with the new account number.

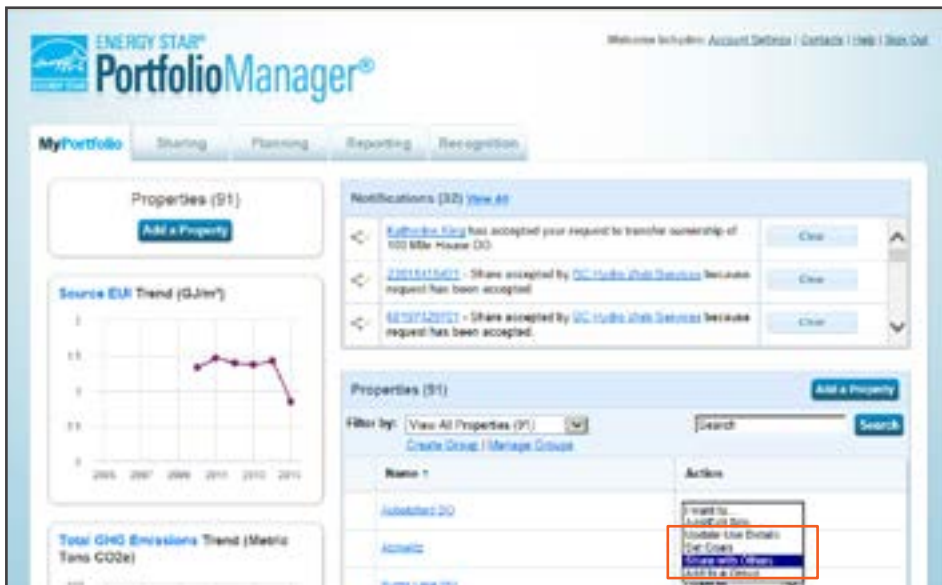
If you need historical consumption data, the new owner must request the previous owner to transfer the portfolio manager account number to the new owner's name. The information can only be accessed from portfolio manager, not from BC Hydro.

BUILDINGS ON NET METERING

If your account is on net metering, the net consumption will be updated to Portfolio Manager. No special setup is required.

Section 5 | changing web services authorizations: share additional properties and meters, share a new meter, remove permissions, or re-setting an existing meter share

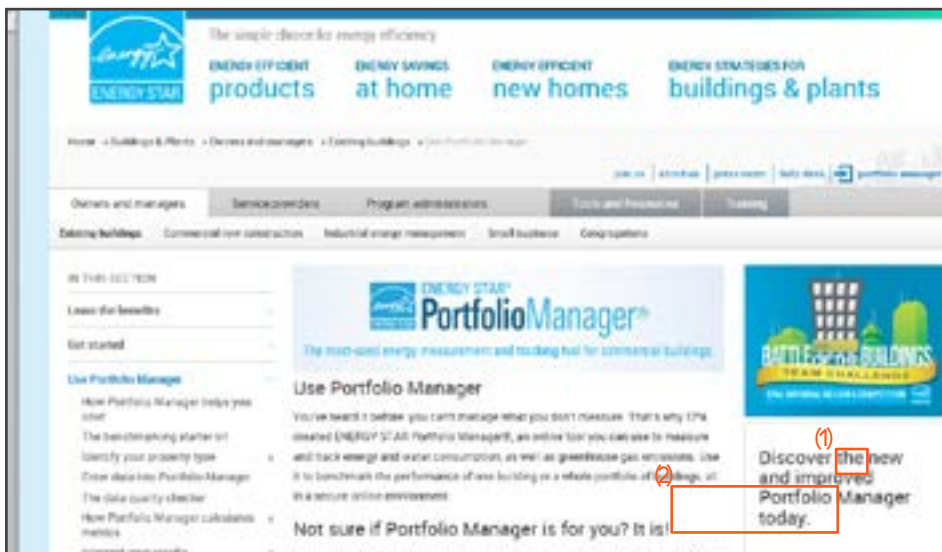
- 5.1 Once you are connected with BC Hydro you can share additional properties with BC Hydro in a few easy steps. On the My Portfolio tab, under the Action column, select Share with Others next to the property name you wish to share with BC Hydro.



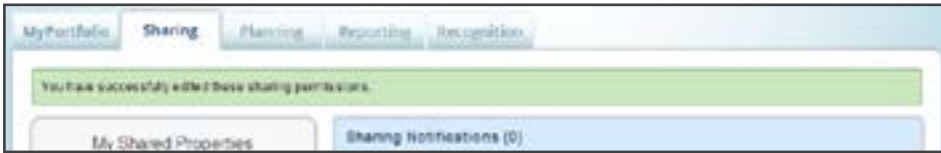
- 5.2 Next, follow the step-by-step instructions beginning in Section 3.9 to connect the additional property and its meters with BC Hydro's Web Services. Finish making your additions, then click "Apply Selections & Authorize Exchange". The pop up window will close. Then, click "Share Property(ies)" to finalize your new share.

AUTHORIZING ADDITIONAL METERS

- 5.3a If you added a new electric meter to a property in Portfolio Manager which is already set up for Web Services data exchange with BC Hydro, and this meter is a separate account, using these directions you can share this additional meter with BC Hydro. From the Sharing tab, under the Action drop-down menu to the right of BC Hydro, select Edit Contact's Permissions.
- 5.3b When the page refreshes, you will see the screen called Edit Sharing Permissions. First (1) click on the blue Edit link highlighted below; a pop up window will open. Follow the step by step instructions in Section 3.9 to authorize a data exchange for your new meter, then click "Apply Selections & Authorize Exchange". The pop up window will now close. Second (2) finalize your changes by clicking on Edit Permissions.

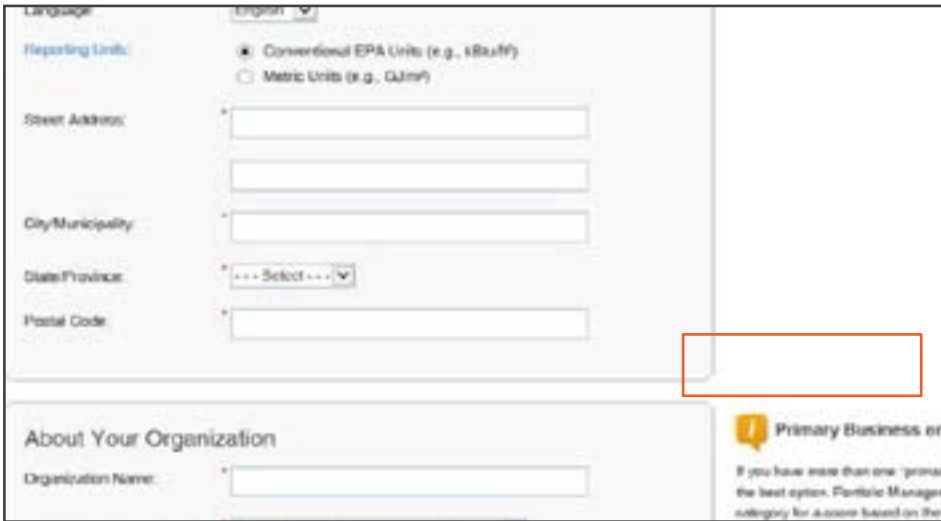


A green banner confirms that you have successfully sent your new sharing permissions to BC Hydro Web Services. It will take 1–2 business days (i.e. overnight) for BC Hydro to accept/reject your new sharing permissions



REMOVING PERMISSIONS FOR SPECIFIC PROPERTIES AND/OR METERS

- 5.4 From the property profile Summary tab, under the Action drop-down menu for BC Hydro, you have several options, including “Edit Contact’s Permissions” or “Remove Contact’s Access to My Properties”.
- 5.4a To stop sharing your property and all associated meters with BC Hydro, select Remove Contact’s Access to My Property.



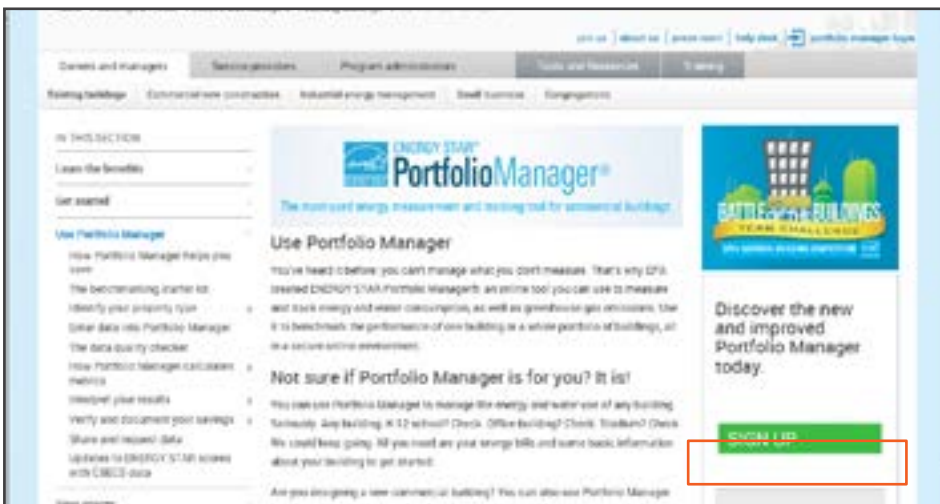
A pop-up window will confirm that you want to remove BC Hydro’s access for this site. Click Continue.



A green banner will confirm that you have stopped sharing your building (and associated meters) with BC Hydro. No new meter data will be uploaded from BC Hydro for this site going forward. Existing meter data previously uploaded into Portfolio Manager from BC Hydro will not be removed, however.



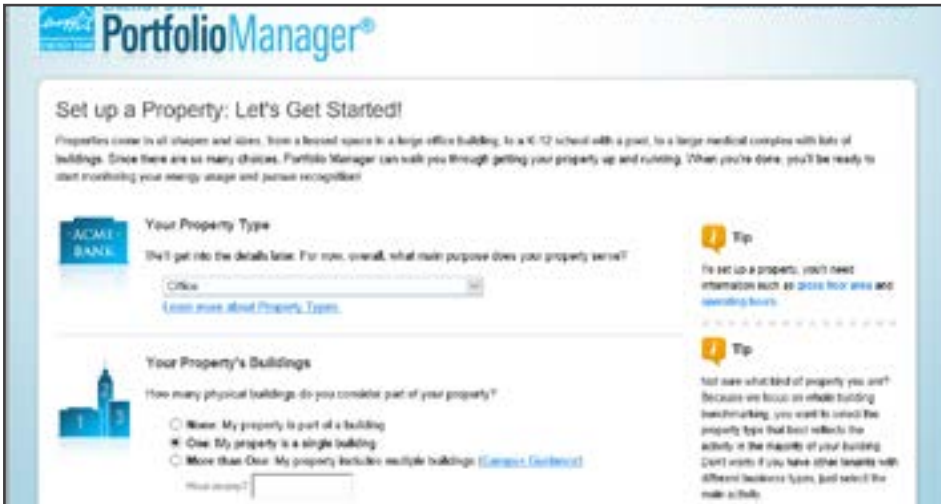
5.4b To remove BC Hydro's access to individual meters, select Edit Contact's Permissions.



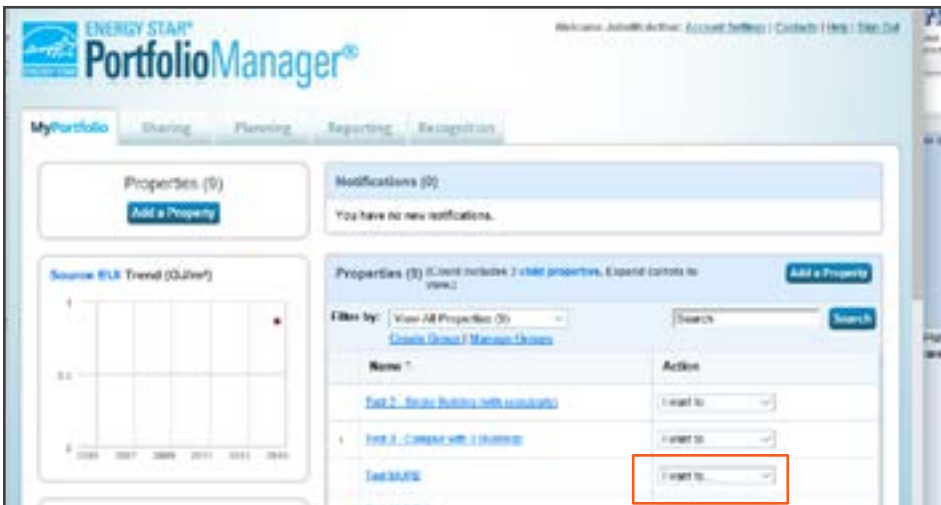
The next screen you'll see is called Editing Sharing Permissions. Click on the word Edit.



For electric meters you would like to remove from BC Hydro's access, change the permissions level from FULL to NONE. Then scroll down and click "Apply Selections & Authorize Exchange" button. This pop up window will then close.



Be sure to finish up by clicking on the Edit Permissions button to finalize the change.



A Green banner confirms that you have successfully edited you meter sharing permissions.



Note: For unshared properties and meters: If you have stopped sharing your individual meter or entire property with BC Hydro, going forward BC Hydro will no longer provide any use data, but any existing meter entries will not be removed from Portfolio Manager. Additionally, your contact Connection with BC Hydro will still be preserved.

RE-SETTING AN EXISTING METER SHARE

5.5 If you have an existing meter share with BC Hydro that is no longer uploading data, or if you made a mistake when setting up a meter share (e.g. the property has multiple accounts and the wrong one was associated with the meter), use the following steps to fix your existing meter share. Note: Do NOT use the “Edit My Contact’s Permissions” option to adjust an existing meter share because BC Hydro will not “see” your edits, even though your changes will appear to have taken effect in Portfolio Manager. To Re-Set an existing meter share to fix an issue, there are three steps required: (1) un-share the property and its meters with BC Hydro, then wait 1 business day for this to be enabled. (2) make your edits (for example change your meter name to the 8 digit meter number), (3) then set up a brand new share of the property and its meters with BC Hydro using the correct information.

5.5a Step 1. Stop sharing your property and all associated meters with BC Hydro by selecting Remove Contact’s Access to Property

The screenshot shows the 'About Your Organization' section of the Portfolio Manager interface. It includes fields for 'Reporting Units' (with radio buttons for 'Conventional EPA Units (e.g., kBtu/h)' and 'Metric Units (e.g., GJ/m³)'), 'Street Address', 'City/Municipality', 'Date/Province' (with a dropdown menu), and 'Postal Code'. Below these fields is the 'About Your Organization' section with an 'Organization Name' field. To the right, there is a 'Primary Business or' section with a yellow information icon and text: 'If you have more than one primary the best option, Portfolio Manager category for a score based on the'. A red box highlights a button in the bottom right corner of the form area.

from the Summary tab of Portfolio Manager.

The screenshot shows the 'Searchability in Portfolio Manager' section of the Portfolio Manager interface. It includes a question: 'Can other people search for you and send you a connection request?' with radio buttons for 'Yes' and 'No'. To the right, there is a 'Connecting with Other Manager' section with a yellow information icon and text: 'You can connect with other people to easily share information. Your account is searchable in order for others to send request.' Below this text is a dotted line.

A pop-up window will confirm that you want to remove BC Hydro’s access for this site. Click Continue.

A green banner will confirm that you have stopped sharing your building (and associated meters) with BC Hydro. No new meter data will be uploaded from BC Hydro for this site going forward. Existing meter data previously uploaded into Portfolio Manager from BC Hydro will not be removed.

IMPORTANT NOTE: due to system limitations the unshare must be processed before proceeding to the next step. Please wait one business day for this to be processed. You will not receive a notification of the unshare being processed by BC Hydro.



5.5c Step 2. Set up a new share with BC Hydro for the property and its meter(s). Follow the steps outlined in Sections 3.7 through 3.10 carefully, making sure to enter all details correctly, such as the account number, last bill date and last bill dollar and cents amount. You may find when you get to the step in 3.9b where the pop-up window opens that the numbers you entered on your first attempt to share the property and its meter(s) are still there. If you do see your old data, be sure to fix any errors in the account number or last bill amount. If these fields are blank when the pop-up window opens, fill them out again carefully. Be sure to select the permissions levels exactly as described in Section 3.9b and 3.9c, and then save your selections as described in Sections 3.9d and 3.9e. You should see a data upload from BC Hydro within 1–2 business days. If you still do not see use data in your meter(s), or if you know you made a data entry error, repeat the un-share/re-share steps described here in Section 4.5, correcting any inaccuracies in data entry or permissions levels chosen.

Section 6 | troubleshooting

Issue #1: I received a notification in Portfolio Manager that my meter sharing has been declined. OR I entered a meter sharing request for my building in BC Hydro's Web Services and it's been more than one business day. However, my energy data still hasn't been uploaded to Portfolio Manager.

Solution #1: Omitting one or more of the steps below will cause BC Hydro's Web Services system to be unable to process your request to upload energy data. After carefully completing all of these steps, you should see your energy use history uploaded within one business day.

1. When submitting your connection request to BC Hydro, read the terms of use and checkmark the "I agree to my provider's terms of use" box. Then press "Send Connection Request".
2. When you initiate sharing the property(ies) of interest with BC Hydro, choose "Exchange Data" level of permissions.
3. In the pop-up window entitled "Select Data Exchange Access Permissions", fill out all fields marked with a red asterisk. Be sure to choose **Full Access** on the Property itself, and **Full Access** for each Meter you are setting up in Web Services. Leave Permissions Levels for any gas meters set to None. Add the Bill Account Number, and add Last Bill Date and Amount (with both dollars and cents). When everything is entered correctly, press "Apply Selections & Authorize Exchange"
4. When the pop-up window closes, you must then click on "Share Property(ies)".

If energy data is still not uploaded within one business day, you may be requesting data for a "closed" account. BC Hydro is unable to provide energy use history for closed accounts.

If your meter sharing request has been declined again, email your property ID, Portfolio Manager meter ID, BC Hydro account number, bill data and bill amount to PMWebServices@bchydro.com for investigation,

Issue #2: BC Hydro's Web Services uploaded my energy use history, but I still haven't received my benchmark score from Portfolio Manager.

Solution #2: There are many reasons why your facility may not have a rating. The best way to find out why is to click on the link that says "N/A" next to the facility name, where the score would otherwise appear. Reasons will be displayed. Also, evaluating your data by running the Data Quality Checker can identify issues with your record. This helpful tool is found on the Summary Tab of Portfolio Manager. For additional assistance with Portfolio Manager and your benchmark score, visit the Frequently Asked Questions page here <http://energystar.supportportal.com/>, contact the EPA's Help Desk at buildings@supportportal.com or Natural Resources Canada benchmarking webpage <http://www.nrcan.gc.ca/energy/efficiency/buildings/energy-benchmarking/3691>

Issue #3: Someone left my company, how can I get access to their buildings in Portfolio Manager?

Solution #3: The fastest solution is to directly contact your former colleague ask that they transfer the properties to your account. Note that you must be connected to BC Hydro Web Services BEFORE the transfer to leave the meter sharing in tact. However, if you are unable to contact this individual and EPA can verify in the database that both accounts are registered under the same company, EPA can transfer the properties on behalf of the former owner. Send EPA a request through the EPA "Ask A Question" form – be sure to include both Portfolio Manager usernames and which properties you want transferred.

To avoid similar complications and/or delays in the future, EPA strongly recommends implementing one of the following procedures:

- Create a corporate account which "owns" all of the properties and have an administrator share properties with employees' individual accounts as necessary. When an employee leaves, this main corporate account can "unshare" with her/him. It can then share with the account of the person taking over the position.
- Ensure that all properties are transferred to the appropriate new property data owner before an employee leaves.

Issue #4: There are duplicate consumption records in Portfolio Manager for the same billing period.

Solution #4: Two conditions can result in duplicate (or overlapping) consumption records:

1. There were records already in Portfolio Manager when the initial history was loaded by the system. Solution: delete whichever record you don't want from each billing period (see instructions in section 3.11).
2. There was a billing correction (rebate/rebill), resulting in a negative consumption record for the same period as positive consumption. Solution: normally you will see 3 records, a negative and a positive for the same amount, plus a 3rd positive entry. Delete the two that match.

Note that normally if one billing period is estimated the following billing period will just be the net amount to offset the actual vs. the estimate, so no duplicate record will be created. You do not need to make any changes in this case.

Issue #5: In some years, your building may not show a weather-normalized source EUI

Solution #5: Portfolio Manager includes metrics designed to 'normalize' conditions that can affect how much energy you need to operate your property in a given year. These effects are incorporated to help you better understand your energy performance. The metrics restrict billing periods to a maximum of 65 days. It is possible in rare cases for the monthly billing period to exceed this. You will need to manually split the billing period into two records.

To resolve this issue:

1. Click on the meter.
2. Select "Display All Years" in the search box.
3. Manually adjust all billing periods longer than 65 days by adding another entry and splitting the consumption between the new record and the one that was there.
4. Click "Save Bills."

Section 7 | frequently asked questions (FAQs)

Does BC Hydro Web Services apply to customers of other electric utilities?

No, customers of Fortis BC Electric, City of New Westminster, Nelson Hydro and any other electric utilities are not eligible for BC Hydro Web Services. Customers of those utilities would have to manually enter or upload their electric consumption.

Who can I contact for assistance?

- Natural Resources Canada benchmarking webpage <http://www.nrcan.gc.ca/energy/efficiency/buildings/energy-benchmarking/3691> or email your question to info.services@nrcan-rncan.gc.ca
- US Environmental Protection Agency Energy Star Portfolio Manager webpage <https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager> and online helpdesk at <https://portfoliomanager.zendesk.com/hc/en-us>
- For technical questions related to BC Hydro Web Services email your Portfolio Manager property ID and Meter ID and your BC Hydro Account number, last bill dates and bill amount and description of your issue to PMWebservices@bchydro.com

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