How to Benchmark Your Building

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

Version 2, November 2019





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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 :

- O Natural Resources Canada benchmarking webpage http://www.nrcan.gc.ca/energy/efficiency/buildings/energybenchmarking/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:

- O how to register for a Portfolio Manager account,
- O create a profile for your property, and
- O 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.

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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/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.



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!

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2.3 Enter the property's name, address, and other general information and click Continue.

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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.

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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.

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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.

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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 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.

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Sources of Your Property's Energy Wat kind of energy do you want to track? Peases select all that apply.	Control of the series of th

2.11 Indicate the Units for each fuel type by double-clicking in the appropriate field and selecting the correct units in the dropdown 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 OOOO999999"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)

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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.

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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.

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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:

- O All of the meters accounting for the building's total energy consumption have been added to the property profile.
- O 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.
- O The city name is spelled correctly in the address for each property.
- O 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.

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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.

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

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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

Send a Cor	nection Request to BC Hydro Web Services to Begin Exchanging Data	
	au requires the following internation in order to exchange data with year propertytics). If you have any subdom about how to camp offset <u>20 Hydro Web Standard</u> . Once your convention request has been accepted, you can share individual properties and/or resters offset <u>20 Hydro Web</u> Standard	
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Архинет	* D Legres to my providents DC Harter Each Devicest Terms of Use	1

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.

MyPerdella Burling Presson Beauting B	With over the Speller Account Settings (Speller) Speller
share properties and, therefore, subtacts this provider to begin another pro- Search Results. The results of poor reserve are fined below. Clicking "Connect" will send a ne- they strongst, you will see them licked an a connected contact in your address.	pend to the person anking them to confirm your request to add them as your contact. If book "Fithey do not accept, or have not accepted yet, you will use them as an
Vour Search Criteria	e it easer to share property information within Portfolio Naneger
Ogarization Designation	
Email Addresse	

- 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.

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BC Hydro Web Services		IC Hydro			Teatle-	4

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.

Po	rtfolio	Mana	ger®		-	nicome betrette Accesit Bittine (Contexts) Hale (Bis
Partfalle	Sharing	Parening	Reporting	Bacogrittee		
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wheps automs	elically) or process	a applications h	r recognition. If this i	sounds like whet you nee	d wat out b	dp member your property, enter energy information by selecting the property/end that you'd like to share add people's access to your properties.
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K		of the access.		properties with jor modil writiand you'll be able to		contraction request, they will alone up on the lat to the set,
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	BC Hydro Hield	PROD_SNC	BCHystoCEN_seafs dts Web Banktes) ECAP_BCHYDRO	308069		To get started, first connect with an angentation that methanism data. Once you are connected, then name will appear on the section fail on the left. Note, pre- connect share in task for "Exchange Data."
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						er Who gets to Share Forward?
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	trecause I are o my share requir	toing a single st whit. and Sharing &	ten Off I want to sto Exchange Data (*Co	ed to choose one permi rose the same permissio askeen Orders') - I need noise i need to give Cool	n for all of to give	

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.

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	0				0 18

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.

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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–2O16. 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

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Your bill highlights

Prepared for John Doe

2. Paper bill example

BC Hydro Prepare JOHN Power smart		number Involce number Billing date Page 400002931631 Jan 15, 2018 2 of 6
Total due for consolidated account		\$5,705.59
Bill details for memb	er accounts	
ANYTOWN BC V6B 5A2 ANYTOWN BC V6B 5A3 Member account # 88660789 Service address. 1234 ANYNAM	E 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	ELECTRICITY CHARGES Based on Large General Service Rate 16 Dec 7, 2017 to Jan 8, 2018	10

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

- O 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.

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Ram								Yes No.
* Share Forward Allow BC Hydro right to share wit			ne trie pro	perly with others and give then	any permissions 7	net hershe has, inch	utra te	0

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.

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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.

	ming Appending Basesphile cess to your propertybell, if you shared prop environment, the watte faces bases made, no acc wide, mail 216.	erties, you will receive a notification	when your conta	d has accepted the
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(RCHydroCEM, Seel) BC Hydro Web Services (RC Hydro Web Services) Saftwere King Ratherine King)	BC Hydro BC Hydro		(Fearth.	1 101-107

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.

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

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$\stackrel{<}{\longrightarrow}$ (0.157425701 has an overlap of 35 days between 11.01/2013 and 12.0522913 dates per per meter water water water and saving your charges. For more help, see $\frac{1}{10.050}$	
\triangleq 41107-020701 has an availage of 22 days between 1210-22113 and 1229-02017 datas per pair mater and/ex and saving pair theorem help: we thin the test table and saving pair theorem.	

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

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



3.11e A confirmation box will pop up, click Continue

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3.11f Click on Save Bills to save your changes

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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).

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· Elaric Meter In	formation	

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

O 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:

O 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

- O 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.
- O Future monthly updates will also not erase or overwrite past data.

UNMETERED CONSUMPTION NOT SENT

O 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

O 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.

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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.

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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

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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.

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

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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.

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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.

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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.

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

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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

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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.

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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 3.1O 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 das. 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:

- O 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.
- O 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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