Reference Guide to

Longmont Power & Communications Benchmarking

Step-by-step instructions for commercial and multi-family building owners to benchmark their building's electric usage using ENERGY STAR® Portfolio Manager®

Additional Resources

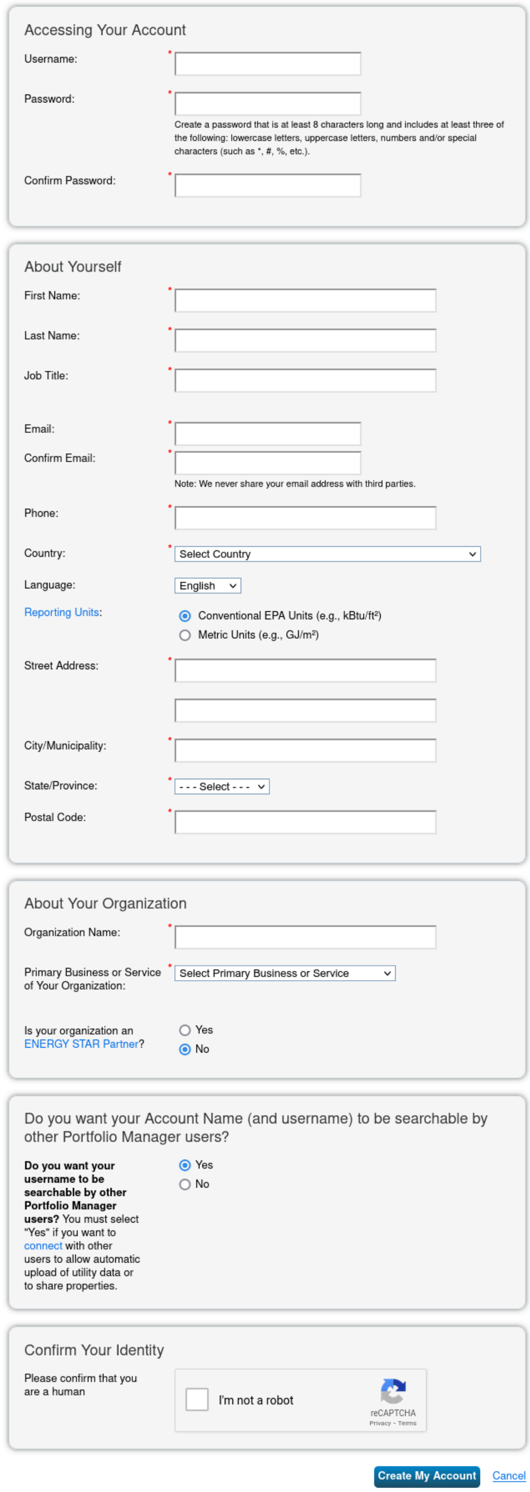
Longmont Power & Communications
benchmarkinginfo@longmontcolorado.gov

Step 1: Create an account in ENERGY STAR® Portfolio Manager®

You'll need an ENERGY STAR® Portfolio Manager® account to comply with statewide benchmarking, or to qualify under a voluntary program. If you already have a Portfolio Manager account, skip to Step 2.

Here's how to create an account in ENERGY STAR Portfolio Manager:

1. Go to the ENERGY STAR Portfolio Manager website sign up sheet at https://portfoliomanager.energystar.gov/pm/signup
2. Create a unique username and password in the box titled "Accessing Your Account." Write this information down so it is documented. **You cannot change your username** after your account is created. For organizations with multiple properties, create a "corporate" account which "owns" all of the properties.
3. Enter information about yourself in the box titled "About Yourself."
   a. If creating this account on behalf of an Organization or Corporation, follow the sidebar instructions for recommendations.
   b. For the option to select "**Reporting Units**," choose "**Conventional EPA Units (e.g. kBtu/ft²)**"
4. Enter information about your organization in the box titled "About Your Organization."
5. In the box asking "Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?" **choose "Yes."**
6. In the box titled "Confirm Your Identity," click the box next to "I'm not a robot."
7. Click "Create My Account" at the bottom of the page



Accessing Your Account
Username: *
Password: *
Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase 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: * Select Country
Language: English
Reporting Units: Conventional EPA Units (e.g., kBtu/ft²) / Metric Units (e.g., GJ/m²)
Street Address: *
City/Municipality: *
State/Province: * --- Select ---
Postal Code: *

About Your Organization
Organization Name: *
Primary Business or Service of Your Organization: * Select Primary Business or Service
Is your organization an ENERGY STAR Partner? Yes / No

Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?
Do you want your username to be searchable by other Portfolio Manager users? You must select "Yes" if you want to connect with other users to allow automatic upload of utility data or to share properties. Yes / No

Confirm Your Identity
Please confirm that you are a human
I'm not a robot
reCAPTCHA
Privacy - Terms

Create My Account
Cancel

Step 2: Create properties in Portfolio Manager

Once you create an account, you can add your building(s) to the account following these next steps. If you already have a Portfolio Manager account with existing properties, you can skip this step and proceed to Step 3.

1. Log in to ENERGY STAR Portfolio Manager® at portfoliomanager.energystar.gov/pm/login
2. Click “Add a Property”

3. Enter your property’s applicable characteristics.
4. Click on “Get Started!” Get Started!
5. Enter Basic Property Information.
6. Click “Continue” Continue
7. Enter values for the information required by Portfolio Manager on how your building is used.
   a. You can collect use details from your tenants using the Data Collection Worksheets.
   b. *If you do not know exact values during this step*, enter in your best guess and check the “Temporary Value” box. This is a virtual indicator reminding you to update this value later.
   c. **Do not** select ‘Use a default’.
   d. **Do not** change ‘Current As Of’ dates.

Property Use Detail	Value	Current As Of	Temporary Value
Weekly Operating Hours	40 ☐ Use a default	1/1/1979	☑

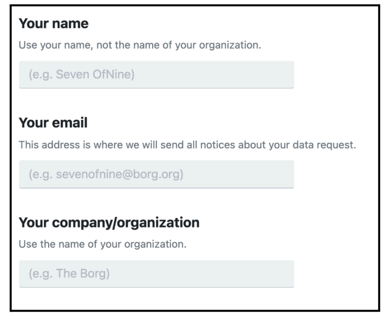
8. Click on ‘Add Property’. Add Property

Step 3: Submit data request to Longmont Power & Communications

In order to submit a benchmarking report, you will need aggregate, or “whole building” data. Submit a data request to get that information.

1. **Go to the Longmont Building Data Request page** benchmarking.longmontcolorado.gov/ Fill out the building data request. You have to answer <u>all</u> the questions in order to get building data.

2. **Enter your name, email and the name of your company or organization.** The email address you enter is where we will send all notices about your data request, including your receipt with your confirmation number.



3. **Search for each building** whose data you want using either the address or the Building ID.

4. **To add a building in the drop down search, click on that entry.** You can also click the blue '+ add’ to the right of the gray address field**.** Enter as many buildings as you need. If the page cannot find your building’s address, email: benchmarkinginfo@longmontco.gov

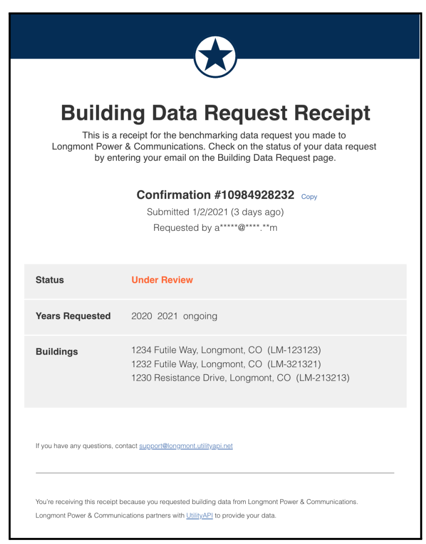
5. **Select the year(s)** for which you want to get data. You can select more than one. Choose ‘ongoing’ to automatically request data when it becomes available in future years.

6. **Click the green ‘Submit request’ button**.

7. **Verify**. You will be asked to verify your email address. Follow the instructions to input the code you will receive.

Building Data Request Receipt

Your Building Data Request Receipt will include your current status. You can use your email address to check on the status of your request at any time.



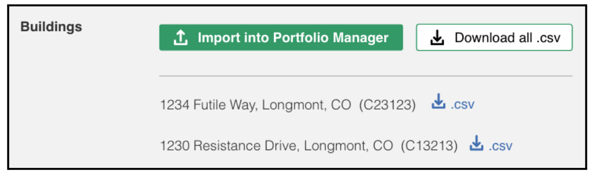
Is my data ready? Data Request Status Changes

Longmont Power & Communications will email you when your Data Request has been approved, or if you need to take additional action such as obtain consent.

Step 4: Import data into ENERGY STAR® Portfolio Manager®

When your building data request is approved, you'll receive a new receipt by email. Congratulations! You did it! Now you have a choice to make about how you want to get the data into Portfolio Manager:

Options for importing data into Portfolio Manager:

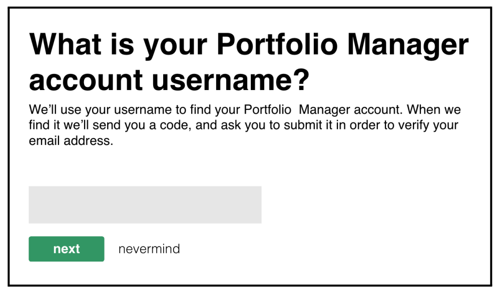


- **Automatically** by clicking 'Import into Portfolio Manager' (which will take you to Step 4a below), or
- **Manually** by clicking 'Download all CSV files' and follow Appendix F: Manually enter building usage to upload your usage data into Portfolio manager.

Step 4a: Enter your username in the Import data window

Clicking the green 'Import into Portfolio Manager' button will start the import process. It will walk you through everything you need to do to get your data into Portfolio Manager.

1. **Enter your Portfolio Manager username** when asked.



2. Then **click the green 'next' button**. The site will use your username to make sure your account is connected to Longmont Power & Communications web services.

   a. **Account already connected**
   Awesome! You'll be taken automatically to Step 4b: Matching up Building IDs to Portfolio Manager properties, below.

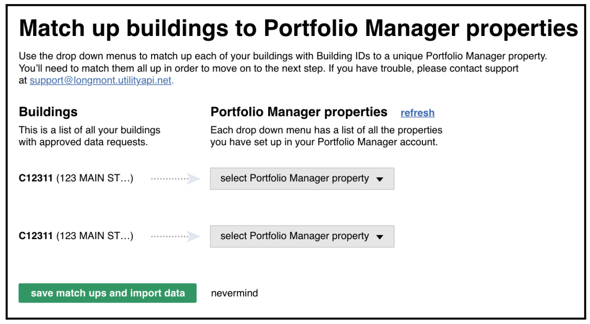
   b. **Account not yet connected**
   No problem! Go to Appendix A: Connect to LPC web services. Follow the steps outlined there to connect your account, then return here and try entering your Portfolio Manager username again.

3. **Email verification**
   You may be asked to verify the email account associated with your Portfolio Manager account. If so, we'll ask you to enter a code that we've emailed to the address on file.

Step 4b: Match-up Building IDs to Portfolio Manager properties

You'll need to share your Portfolio Manager properties before you can match them up with their Building IDs. The site will check automatically to see if you have shared your properties. If you have *not* yet shared your properties, go to [Appendix B: Share properties in Portfolio Manager](#) and complete the steps there. Then come back here to match them up with the correct Building IDs.

If you've shared your Portfolio Manager properties, you'll see a pop up window that asks you to match each of your buildings to the correct Portfolio Manager property.



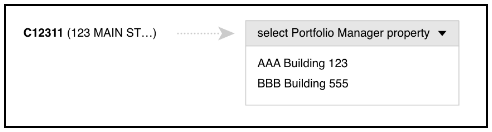
Buildings column

The left column contains a list of all your buildings with approved data requests. The buildings are listed by address and Building ID. If any of your buildings are missing from these lists, please contact support at support@longmont.utilityapi.net.

Portfolio Manager properties column

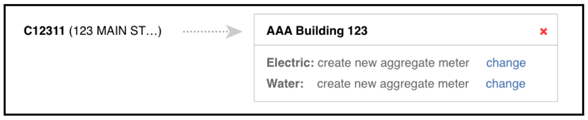
The right column is a series of drop down menus with a list of all the properties you have shared in Portfolio Manager. If any of your buildings are missing from this list, you'll need to login to your Portfolio Manager account and share them (see Appendix B).

Matching



Use the drop down to select the property that matches the building on the left, on that same line. Once you have matched a property to a building, it is no longer available to be matched to another building.

Unmatching

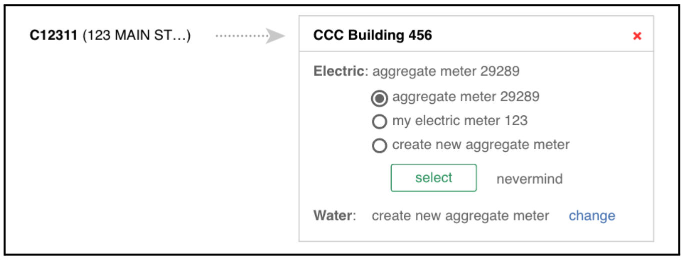


Use the red X to the right of a matched Portfolio Manager property to unmatch that property from a building. Once that property is unmatched from a building, it becomes available to be matched to a different building.

Creating aggregate electric meters

Virtual aggregate (or whole building) meters are necessary for benchmarking. Once you've matched a property to a building, we'll need to create those aggregate electric meters for each property. First, we'll check your Portfolio Manager account to see if you already have an existing meter. If so, it will be listed. If not, we will create new aggregate meters for you by default, unless you select a different option.

Changing the default aggregate meter



1. **Click the blue 'change' link** to the right of each aggregate meter choice to override the default. This will bring up a series of choices for your aggregate meters.
2. **Select the radio button** next to your preferred option. You can only select one option.
3. **Click the 'select' button** outlined in green to save your choice and collapse the menu.

Step 4c: Import data

You have three options, all at the bottom left of the page:

- Click the green **'save match ups and import data'** button. You're done! Or,
- Click the **'save match ups but don't import yet'** outlined in green to import later, but not lose your work. Or,
- Click the **'nevermind'** text to leave the process.

Step 5: Follow Xcel's instructions to obtain natural gas data

If you're an Xcel Energy natural gas customer, you should now follow the instructions in the Xcel Energy Benchmarking Services User Guide to obtain natural gas data.

https://www.xcelenergy.com/staticfiles/xe/PDF/Marketing/Bus-Solutions-Benchmark-User-Guide.pdf

Once you have completed the steps, return to Step 6: Run the Data Quality Checker in this guide to complete the benchmarking compliance process.

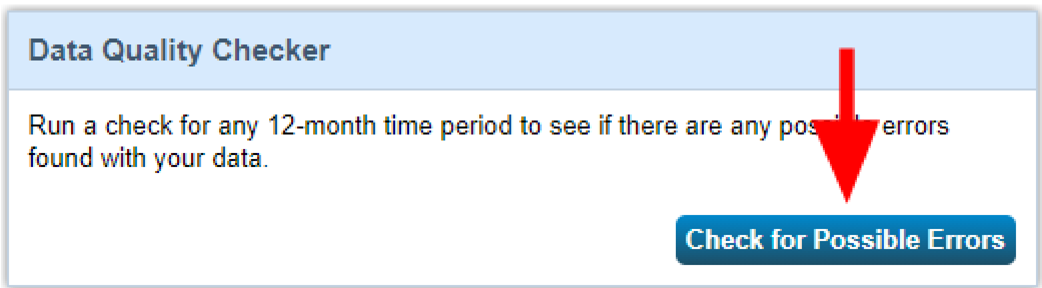
If Xcel Energy does not provide natural gas services to this building, contact your natural gas utility and request at least 12 months of natural gas usage. Then consult Appendix D: Manually Enter Building Usage in Portfolio Manager for directions on how to manually enter your monthly usage.

Step 6: Run the Data Quality Checker

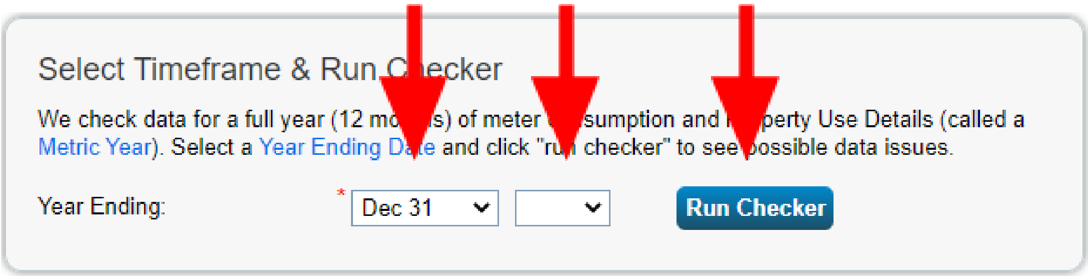
Once you have at least 12 full months of electric data in your meters for the calendar year you are trying to report, run the Data Quality Checker to check for any common errors in your report before submitting.

1. Log in to Portfolio Manager. Visit portfoliomanager.energystar.gov/pm/login
2. Select your property from the MyPortfolio Dashboard.
3. On the property's "Summary" tab

   Scroll down to find the **Check for Possible Data Errors** section, select "Check for Possible Errors."



4. Select "Dec 31" in the first drop down, then select the data year you are reporting for in the second drop down (e.g. if the building is submitting the 2022 report, the data reporting year should be set to 2021) then click "Run Checker"



5. Review the list of alerts (if any) and Portfolio Manager's suggestions to address the issue(s).
   - Common alerts include temporary or estimated values or less than 12 full calendar months of electric bills.
   - **You can ignore waste, water, natural gas and materials meter alerts.**
6. Following the links in the explanations, make corrections or updates to your property details to address as many alerts as possible.

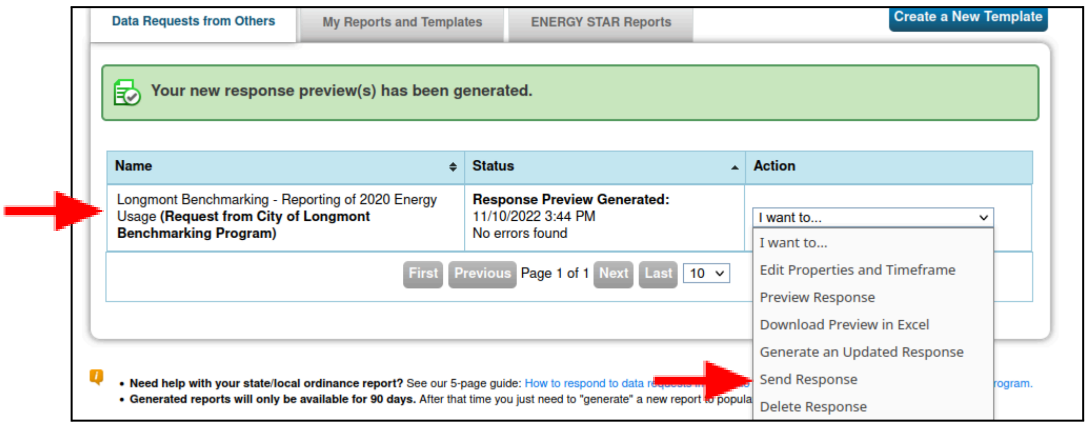
   Submittals will be subject to a quality control review and will be rejected if data input errors are found.
7. Once you have made all applicable changes, re-run the checker to ensure that the alerts have been addressed.

Step 7. Submit Your Report to the City or State

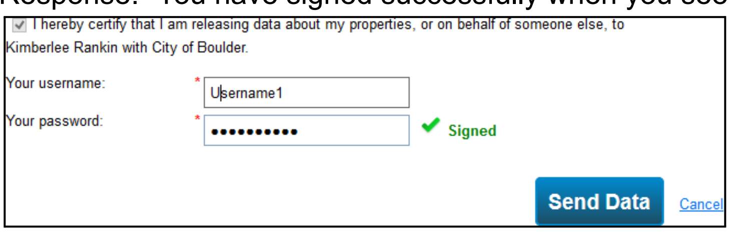
You must manually submit your report to the City through Portfolio Manager.

1. Locate the required reporting link on the program webpage: https://www.longmontcolorado.gov/departments/departments-e-m/longmont-power-communications/electric-service/building-energy-benchmarking
2. The reporting link will take you to Portfolio Manager. Sign in, if prompted. Once signed in, the link will launch a page titled **Respond to Data Request**.
3. At the bottom of the page, you will need to choose the properties to report using the drop- down menu(s) and click "Generate Response Preview"

4. Upon generating the response, you will be taken to the Reporting tab. Find the response at the top of the table, highlighted.
5. **To submit, use the drop-down menu in the "Action" column to select "Send Response."**



6. On the page that appears, you must electronically sign your report by checking the certification box, entering your Portfolio Manager login information, and clicking "E-Sign Response." You have signed successfully when you see a green alert with a check mark.



7. **Click "Send Data" and confirm submission by clicking "Continue" on the popup.** Your report has now been submitted to the City!

If you qualify for the Colorado State building performance program. You need to additionally submit your report to https://www.buildingperformanceco.com/. After you submit your report to the city and/or the state, you will receive an email confirmation for your submission.

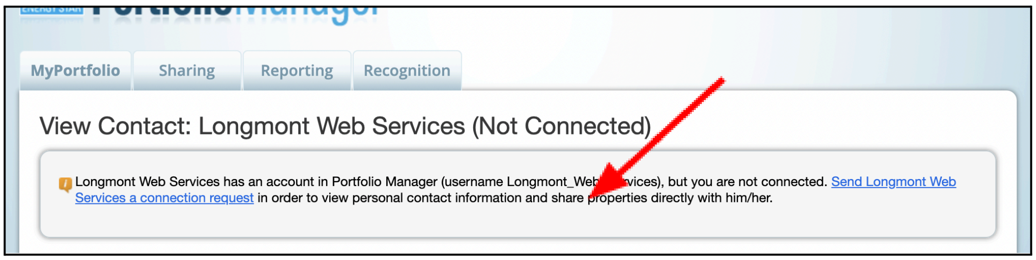
Errors or updates? If, after submitting your data to the City, you discover that any information or data is inaccurate, make the necessary corrections in Portfolio Manager. 'Generate an Updated Response' from the 'Action' drop down, then re-submit to the City and/or State. For help, please contact benchmarkinginfo@longmontco.gov.

Appendix A: Connect to LPC web services

To import your data request directly into your portfolio manager account, you must first request to connect to Longmont Power & Communications.

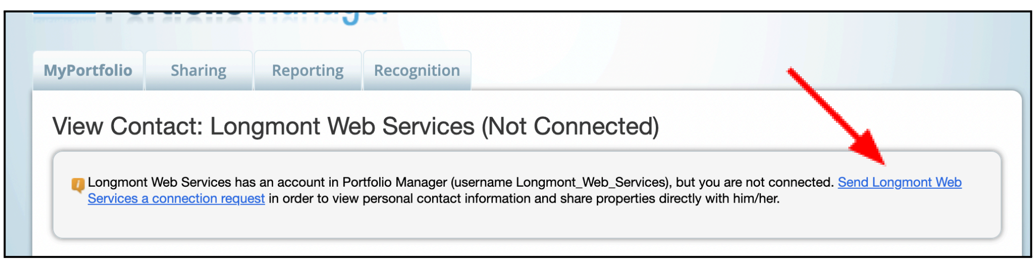
1. Visit the contact page for Longmont Power & Communications (you may need to login): https://portfoliomanager.energystar.gov/pm/contact/view/456306

2. Check the connection status:



   - If "Connected", you are done! We have accepted your connection.
   - If "connection pending", you are done! We will accept your connection soon.
   - If "Not Connected", proceed to the next step below.

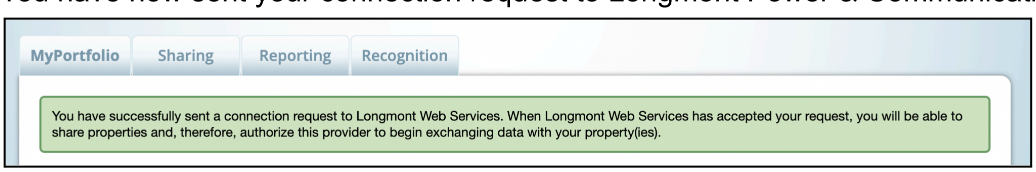
3. If "Not Connected", click "Send Longmont Power & Communications a connection request"



4. Click "Continue"

5. Send the Connection Request.

6. You have now sent your connection request to Longmont Power & Communications!

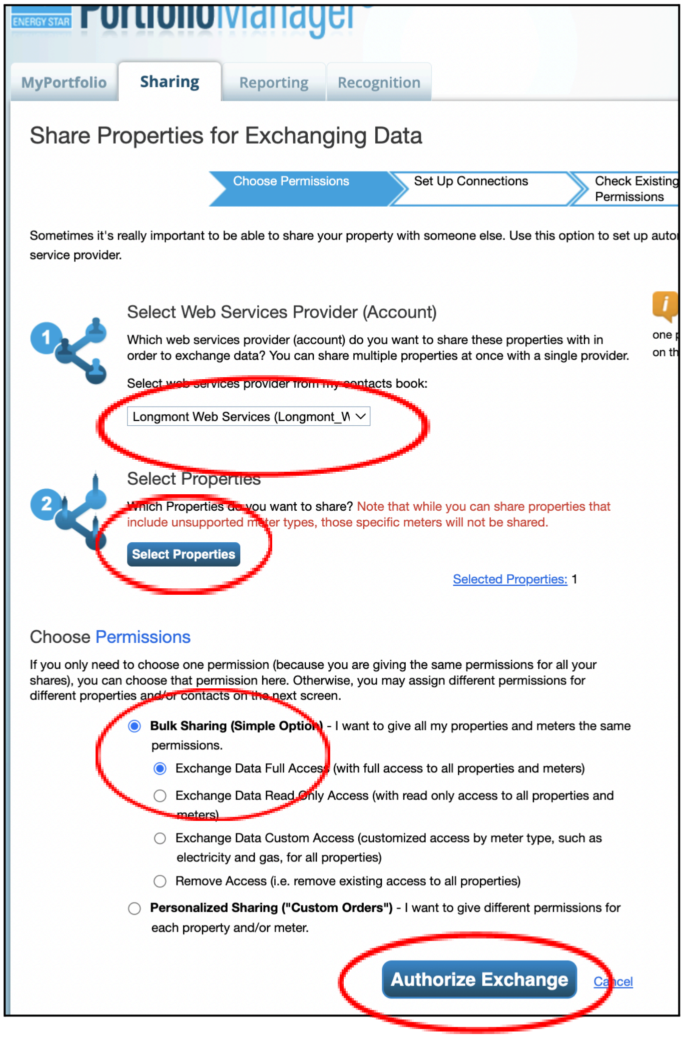


Appendix B: Share properties in Portfolio Manager

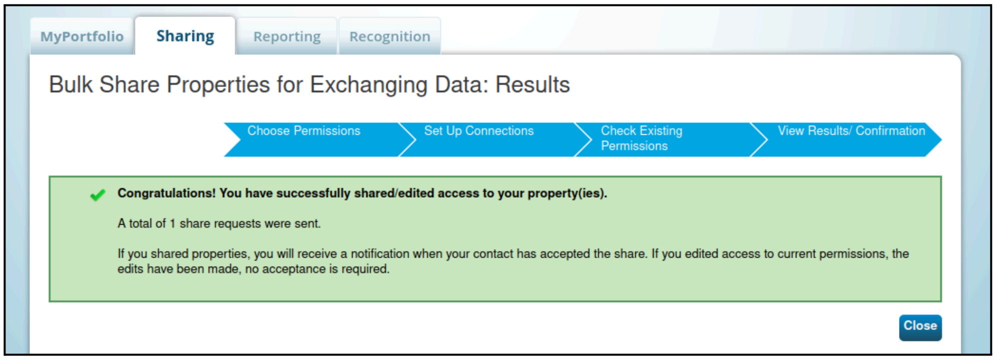
To import your data request directly into your portfolio manager account, you must share your properties with Longmont Power & Communications.

Visit the data sharing page for Longmont Power & Communications (you may be asked to login):https://portfoliomanager.energystar.gov/pm/sharing/wsBulkSharing

1. Select "Longmont Web Services"
2. Select the properties you want to share with Longmont Power & Communications. See Appendix G for how to select properties.
3. Select "Bulk Sharing" > "Exchange Data Full Access" under Choose Permissions.
4. Click "Authorize Exchange"



You're done! You should see a confirmation of the property sharing.



Appendix C: Getting and giving consent

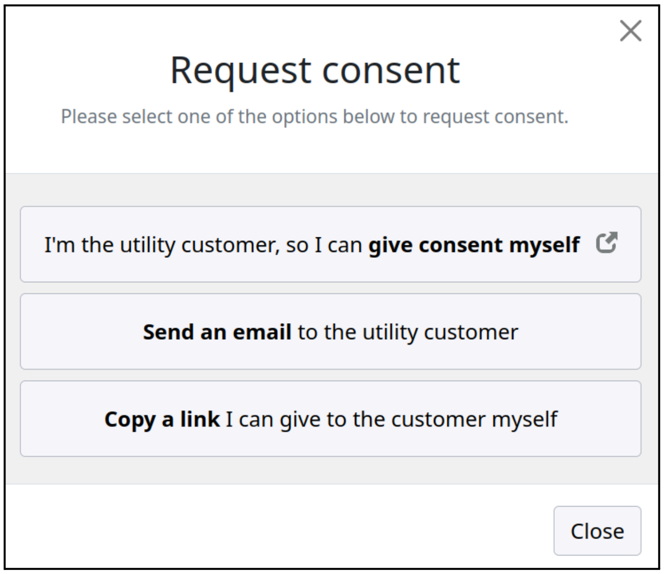
Step C-1: Getting consent

If your building is under a certain threshold of meters associated with that building, Longmont Power & Communications will require that you get consent from your building tenants. You'll get an email notification to load your receipt, which will include links to start the consent process. Clicking on the link will begin the authorization process.

The authorization process begins with a consent request to the customer of record. You have 3 options to send a consent request from the pop-up

A. If you're the building owner, or owner representative, you can provide consent yourself. **Click "give consent myself"** and follow the steps to authorize sharing.

B. This option allows you to send a pre-written email to the account holder asking for their consent. Since this email will not come from you personally, you should reach out to the contact to make sure they know you'll be sending — or already have sent — them a consent request to securely share their utility data. **Click "Send an email"** to edit optional fields before **clicking "Send Data Request"** to send the email.

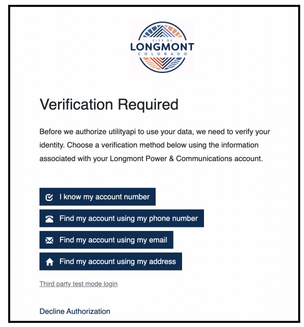


C. This option allows you to personally send a data consent request email using a unique URL. **Click "Copy a link"** to copy this URL into your own email to personalize the consent request to the tenant/occupant/utility customer. Each link is unique — **repeat the "Copy a link" step for <u>each</u> address.**

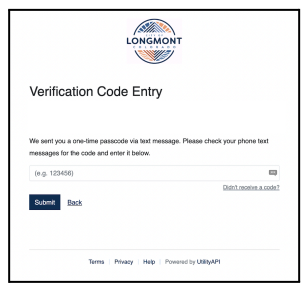
Step C-2: Giving Consent

The above instructions in this appendix on giving consent can be given to the tenant/occupancy/customer to walk them through the consent process. Once the building owner sends a data consent request, the Consent Request Page or Email **will ask the customer to look up their Longmont Power & Communications account number by entering ONE of four pieces of information:**

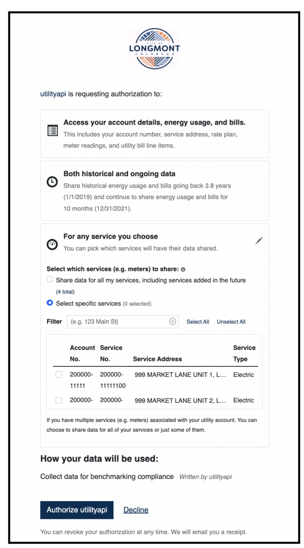
- their account number,
- their phone number,
- their email address, or
- their physical address



1) The customer will select whichever option they prefer to look up their Longmont Power & Communications account.



2) Longmont Power & Communications will then send the customer a verification code via text message, phone call, or email that will need to be entered in the next page, after which they'll click "Submit".



3) Longmont Power & Communications will request the customer's authorization to provide the owner with access to their data for aggregation and sharing. They will click the "Authorize…" button.

That's it. The customer is done!

They'll get a receipt from Longmont Power & Communications once they've authorized owner access.

Appendix D: Manually enter building usage in Portfolio Manager

If you did not elect to automatically import your whole building usage into your Portfolio Manager property's meters, you will need to manually upload the usage into your meters directly. The below steps assume you've downloaded your usage as an .xlsx file from Step 4.

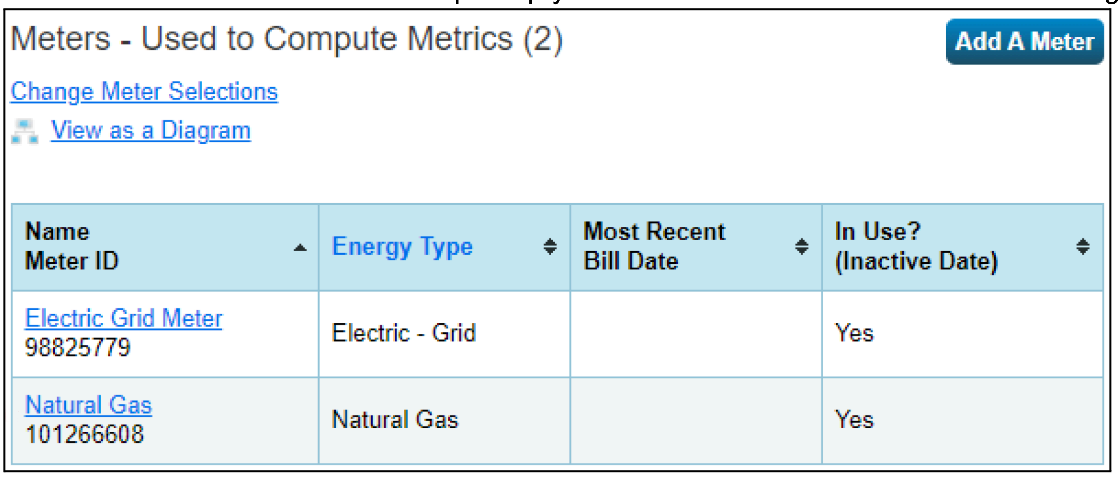
If you would would like you go back and use the automated import feature, simply click "Import into Portfolio Manager" on your Data Request receipt.

1. Manually add the relevant Building IDs (city and/or state) to your property's metadata. See Appendix E for instructions on how to do this.

2. Manually create a whole-building virtual electric meter for each property, if you have not previously done so. See Appendix F for instructions on how to do this.

3. Select your building from the MyPortfolio Dashboard. Choose the Energy tab for Electric and Gas usage. Choose the Water tab for Water usage.

4. Find your electric, natural gas, and/or water meter in the "Meters – Used to Compute Metrics" table. Click on the meter name to open up your meter. *Here's how it looks under Energy:*



Meters - Used to Compute Metrics (2)

Add A Meter

Change Meter Selections

View as a Diagram

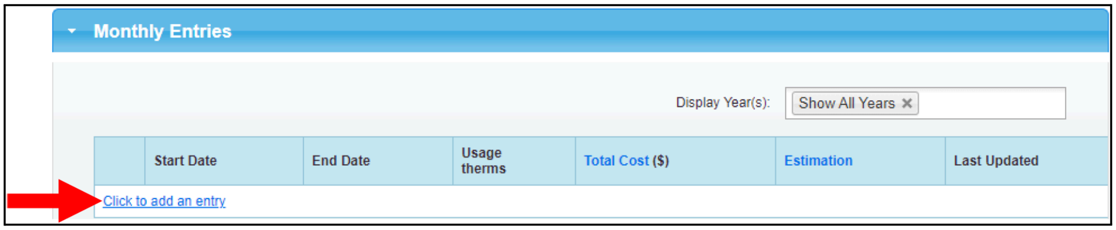
Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter 98825779	Electric - Grid		Yes
Natural Gas 101266608	Natural Gas		Yes

5. Within your meter, click on the "Basic Meter Information" arrow to expand this section.

6. Verify the meter "Units" match the units your data was provided in (For water, "Gallons (US)"; for Electric: "Kilowatt Hours (kwh)"; for Gas: "Therms (therm)". If correct, no further action is needed. If the units of the data differ from the units selected for your meter, click on the "Units" drop down menu and select the correct units to match the data you received.

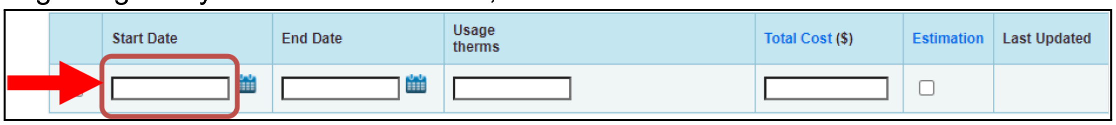
7. Click "Save Changes". 

8. Scroll down to view the “Monthly Entries” section and “Click to add an entry”.

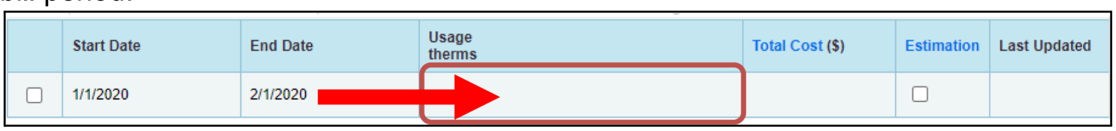


9. Open your downloaded .xlsx file to view the spreadsheet of start date, end date, and usage values. These will be the rows you manually input into Portfolio Manager.

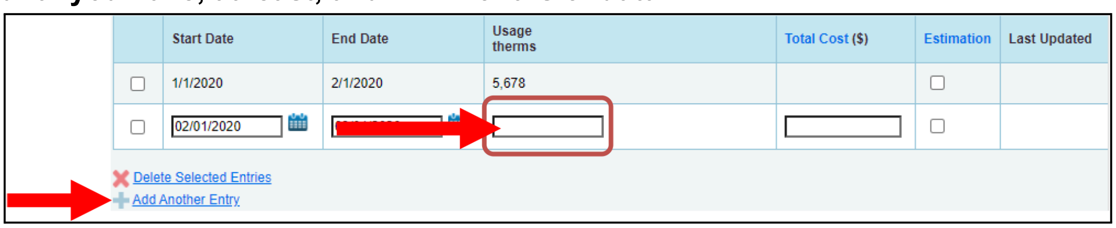
10. Beginning with your earliest start date, enter "Start Date" and "End Date".



Click on the table under “Usage *(with the appropriate units)*” and enter in the usage for that bill period.



11. Below the table, click “Add Another Entry”. Add in the dates and usage data for this month. **Repeat this step by clicking “Add Another Entry” and entering in your usage until you have, at least, a full 12-months of data.**



12. Click “Save Bills” **Save Bills**

Appendix E: Add your State or City Building ID to Portfolio Manager

Each building that's able to benchmark has been assigned a unique ID either by the State of Colorado or the City of Longmont, called the **Building ID**. **You must add this ID to every Portfolio Manager property that you will report to make sure the usage gets attributed to the correct building during compliance checks.**

> **Can I skip this part?** If you use the automated "Import into Portfolio Manager" button on your Data Request receipt to sync your property's usage data into Portfolio Manager, your Building IDs will *also* automatically sync; you can skip the instructions in Appendix E.

1. How to find your Colorado State Building ID:

   - If your property is large enough to qualify for the Colorado State benchmarking program, the state will have your Building ID assigned by address
   - Search for your State Building ID here: https://buildingid.touchstoneiq.com/
   - The state Building ID is usually a "C" followed by a few digits (e.g. "C11111").

2. How to find your City of Longmont Building ID:

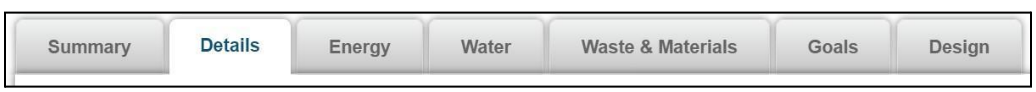
   You can email benchmarkinginfo@longmontcolorado.gov or call 303-651-8700 to obtain your city Building ID.

3. If you do not have any state or city Building IDs assigned to your property, you can skip the remainder of these instructions.

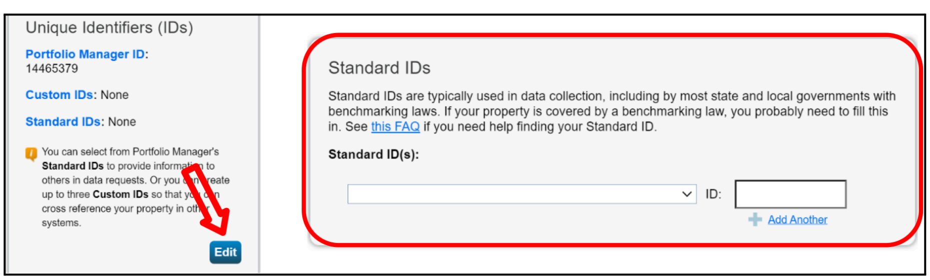
4. Now that you have your Building IDs, you need to add them to your property's details. Log in to ENERGY STAR Portfolio Manager. Visit portfoliomanager.energystar.gov/pm/login

5. Select your building from your MyPortfolio Dashboard.

6. Click on the "Details" tab.



7. Locate the "Unique Identifiers (IDs)" box on the left and click "Edit." After clicking "Edit," scroll to the bottom to find the box titled "Standard IDs."



8. Click on the dropdown menu in this box and select "Colorado Building ID" or "Longmont CO Energy Benchmarking Building ID".

9. In the empty box next to the Building ID, enter your State or City Building ID. **Click Save**.

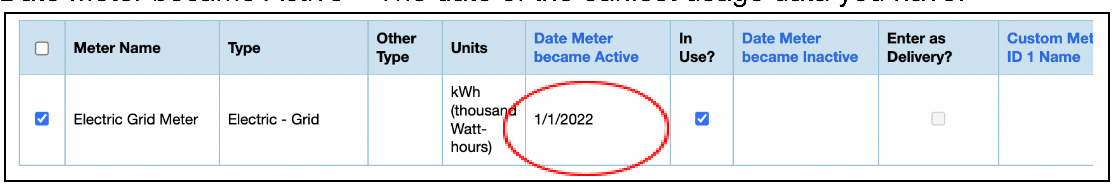
Appendix F: Manually create virtual meters in Portfolio Manager

To manually enter usage data for your property you'll need to add a virtual whole building (aggregate) meter.
Click on the tab for the source of usage you're reporting. For electric and gas, click on the "Energy" tab .

1. Log in to Portfolio Manager. Visit portfoliomanager.energystar.gov/pm/login
2. Select your property from the MyPortfolio Dashboard.
3. Select the tab for the source of usage you're reporting. For electric and gas, click on the "Energy" tab. For water, click the "Water" tab.
4. Click on "Add A Meter"
5. Select the following variables for each usage source. **For "How Many Meters", always enter "1"**

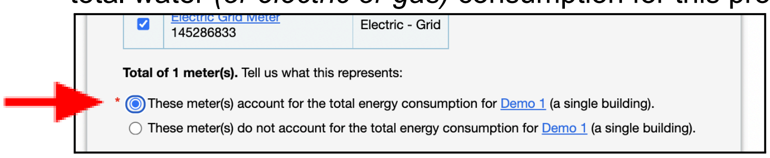
For Electric Meters	For Natural Gas Meters:	For Water Meters:
1. Select "Electric" 2. Select "Purchased from grid"	1. Select "Natural Gas"	1. Select "Municipally Supplied Potable Water" 2. Select "Indoor"

6. Click on "Get Started!" Get Started!
7. Enter the following fields for the meter:
    a. Units – Water: "Gallons (US)"; Electric: "Kilowatt Hours (kWh)"; Gas: "Therms (therm)"
    b. Date Meter became Active – The date of the earliest usage data you have.



	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Met ID 1 Name
☑	Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	1/1/2022	☑		☐	

8. Click on "Create Meters" Create Meters
9. Skip the usage entries and click on "Continue" Continue
10. With the boxed checked next to the meter name just created, select "These meter(s) account for the total water *(or electric or gas)* consumption for this property"



11. Click on "Apply Selections" Apply Selections

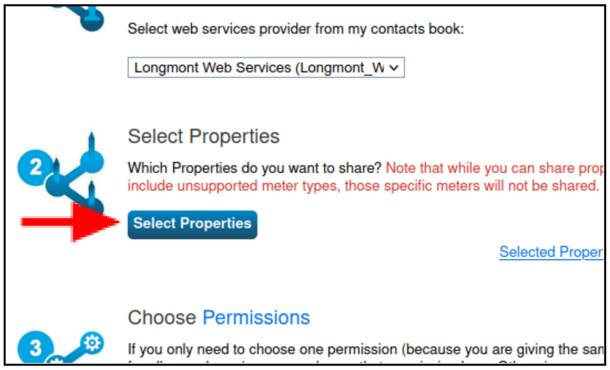
You've now manually added virtual meters to Portfolio Manager!

You'll now need to manually enter at least 12 months of usage data from your provider to generate a report that complies with the benchmarking ordinance. To do that, move on to the remainder of Appendix D: How to manually enter building usage in Portfolio Manager.

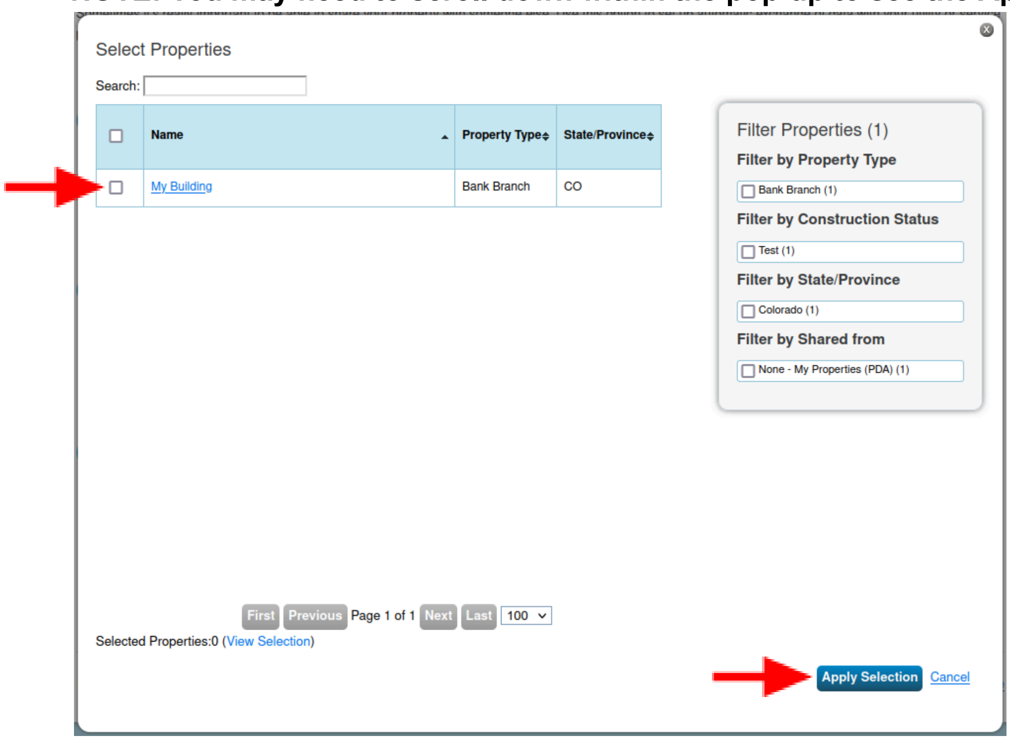
Appendix G: Selecting which Properties to Share

During the process of sharing your properties in Appendix B, you will be asked to select the properties you want to share with Longmont Web Services. Below shows what the property selection pop-up looks like during this process.

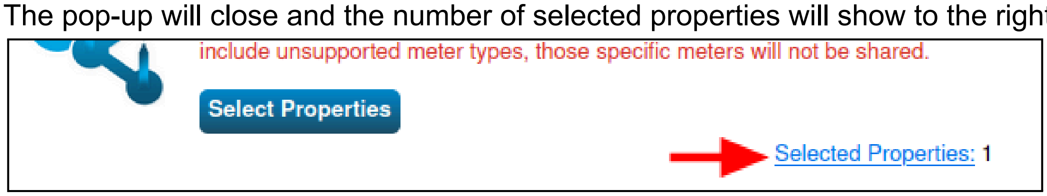
1. Click the "Select Properties" Button. This will bring up the property selection pop-up.



2. Check the checkboxes next to the properties you want to share, then click "Apply Selection". **NOTE: You may need to scroll down within the pop-up to see the Apply Selection button.**



3. The pop-up will close and the number of selected properties will show to the right.



4. Continue with the rest of the steps in Appendix B.