

Portfolio Manager Meter Maintenance

<https://www.energystar.gov/portfoliomanager>

Once the monthly consumption data has been uploaded to Portfolio Manager, a few tasks are required to make that data usable.

- The meters created by Con Edison are not automatically included in the performance metrics for your building. Follow the instructions in Section 1 to do that (page 2).
- And once those meters are included in your metrics, there may be gaps and overlaps between the historical and aggregated meters. Section 2 will be able to help with that (page 5).
- And if a rerun of your consumption data is required, there are special considerations for Portfolio Manager. Section 3 contains warnings that you need to know before doing that (page 7).

1. Include Meters in My Metrics

On the Energy tab, you will find your Con Edison aggregated meters and consumption data. They are located under the Additional Meters – Not Used in Metrics section. These meters need to be categorized as Meters – Used to Compute Metrics. In order to do that, you can either wait overnight for a job to run to upgrade your meters to be included in your metrics OR you can upgrade them automatically by clicking on the **Change Meter Selections**.

The screenshot shows the 'MyPortfolio' interface for 'ABC Company'. The 'Energy' tab is selected and highlighted with a red box. The 'Meters - Used to Compute Metrics (0)' section is also highlighted with a red box and contains a message: 'No meters selected for performance metrics. You have not selected any meters to be included in your energy metric calculations. Learn more about choosing meters to be included in your metrics. What to do: Tell us which meters to include in your performance metrics.' Below this, the 'Additional Meters - Not Used in Metrics (1)' section is highlighted with a red box and contains a 'Change Meter Selections' link. A table lists one meter: 'CLEVELAND STRE 334/E/9 36955311' with an energy type of 'Electric - Grid', a most recent bill date of '12/14/2016', and is currently 'In Use? (Inactive Date)'. A 'Download Annual Totals by Meter' button is located below the table. On the left, there is a 'Meter Summary' section showing '1 Energy Meters Total' and '1 - Not Used in Metrics', and a 'Four Ways to Enter Bill Data' section with instructions for manual entry, spreadsheets, and organization linking.

MyPortfolio | Sharing | Reporting | Recognition

ABC Company
4 Irving Place, New York, NY 10003 | [Map It](#)
Portfolio Manager Property ID: 6178632
Year Built: 2000
[Edit](#)

Not eligible to apply for ENERGY STAR Certification
Weather-Normalized Source EUI (kBtu/ft²) Why not score?
Current EUI: N/A
Baseline EUI: N/A

Summary | Details | **Energy** | Water | Waste & Materials | Goals | Design

Meter Summary
1 Energy Meters Total
1 - Not Used in Metrics
[Add A Meter](#)
Current Energy Date Not Available
[Enter Your Bills](#)

Meters - Used to Compute Metrics (0)
[View as a Diagram](#)
[Add A Meter](#)

! No meters selected for performance metrics.
You have not selected any meters to be included in your energy metric calculations.
[Learn more about choosing meters to be included in your metrics.](#)
What to do:
[Tell us which meters to include in your performance metrics.](#)

Four Ways to Enter Bill Data
1. Manually
2. Use our [simple spreadsheet](#) (one meter) to upload or Copy/Paste
3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)
4. [Find an organization](#) to electronically enter your data into Portfolio Manager

Additional Meters - Not Used in Metrics (1)
[Change Meter Selections](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
CLEVELAND STRE 334/E/9 36955311	Electric - Grid	12/14/2016	Yes

[Download Annual Totals by Meter](#)

Select what meters to include in your metrics and whether those meters account for all of the property's energy. Most properties will check the boxes for all their meters and select the option that states that these meters account for the total energy consumption for the building. Then click **Apply Selections**.

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MyPortfolio | Sharing | Reporting | Recognition

Select Meters to Include in Metrics

Tell us which meters to include when calculating the metrics for [ABC Company](#) so that we can provide you with the most accurate metrics possible.

Summary

0

Please select at least one meter and tell us what it represents.

Energy Meters

Select all meters to be included in your metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

<input type="checkbox"/>	Name Meter ID	Type
<input type="checkbox"/>	CLEVELAND STRE 334/E/9 36955311	Electric - Grid

Total of 0 meter(s). Tell us what this represents:

- * These meter(s) account for the total energy consumption for [ABC Company](#) (a single building).
- These meter(s) do not account for the total energy consumption for [ABC Company](#) (a single building).

Apply Selections [Cancel](#)

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Your meter(s) are now included in your metrics.

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ABC Company
 4 Irving Place, New York, NY 10003 | [Map It](#)
 Portfolio Manager Property ID: 6178832
 Year Built: 2000
[Edit](#)

Weather-Normalized Source EUI (kBtu/ft²)
Current EUI: 17.7
 (74.7% better than median.)
Baseline EUI: 15.5
 (77.8% better than median.)

Energy | Summary | Details | Water | Waste & Materials | Goals | Design

Meter Summary
 1 Energy Meters Total
 1 - Used to Compute Metrics
[Add A Meter](#)
 Current Energy Date
 Nov 30, 2016
[Enter Your Bills](#)

Energy Use by Calendar Month
 Site Energy (kBtu)
 Oct '14 Jan '15 Apr '15 Jul '15 Oct '15 Jan '16 Apr '16 Jul '16 Oct '16
 Electric - Grid

[Export Data by Calendar Month](#)

Four Ways to Enter Bill Data
 1. Manually
 2. Use our [simple spreadsheet](#) (one meter) to upload or Copy/Paste
 3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)
 4. [Find an organization](#) to electronically enter your data into Portfolio Manager

Meters - Used to Compute Metrics (1)
[Change Meter Selections](#)
[View as a Diagram](#)
[Add A Meter](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
CLEVELAND STRE 334/E/0 36955311	Electric - Grid	12/14/2016	Yes

[Download Annual Totals by Meter](#)

Your Property is: [Edit](#)
 A Single Building
 Part of a Building
 A Campus of Multiple Buildings

2. Handling Historical and Aggregated Meters

The meters generated by the Con Edison Portal are aggregated meters that reflect total consumption across multiple accounts, in order to provide whole-building consumption data. And it is assumed that the customer's existing Portfolio Manager Account may contain existing/historical meters that are not the same as the newly generated aggregate meters. It is imperative to ensure that the transition from the historical meter to Con Edison's aggregate meter is captured cleanly in Portfolio Manager and that no meter data gaps or instances of consumption double-counting are created.

To ensure that the transition is handled smoothly, get the date the aggregated meter became active. This date will be used to inactivate the existing/historical meter(s). Start by going to the Energy tab and clicking on the name of the aggregated meter. Click on the caret next to the Basic Meter Information header to display the following. You will see that this aggregated meter became active on Dec 15, 2014. This will be the inactive date for any existing/historical meter(s) on the account.

Please note: **NEVER delete aggregated meters under any circumstances. Deleting consumption data is permissible but not the aggregated meters since these meters will be used to post consumption data now and in the future.**

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Manage Bills (Meter Entries) for [ABC Company](#)

Meter Selection: CLEVELAND STRE 334/E/9 - 369...

Basic Meter Information

Name: CLEVELAND STRE 334/E/9 [Delete Meter](#)

Meter ID: 36955311

Type: Electric - Grid [Need to change?](#)

Units: kWh (thousand Watt-hours)

Date Meter became Active: 12/15/2014 Still In Use

Date Meter became Inactive:

[Save Changes](#)

Monthly Entries

Display Year(s): 2016

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Updated
<input type="checkbox"/>	12/15/2015	1/14/2016	12,960		<input type="checkbox"/>	<input type="checkbox"/>			12/22/2017 Con Edison

For the existing/historical meter(s), unclick the **Still In Use** checkbox and add the active date from the aggregated meter as the inactive date for the historical meter(s). Remember to **Save Changes**.

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Manage Bills (Meter Entries) for [ABC Company](#)

Meter Selection: Historical Electric Grid Meter - 380...

Basic Meter Information

Name: * [Delete Meter](#)

Meter ID: 38016141

Type: Electric - Grid [Need to change?](#)

Units: *

Date Meter became Active: * Still In Use

Date Meter became Inactive:

Save Changes

Monthly Entries

Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Updated
<input type="checkbox"/>	11/1/2014	12/15/2014	20,000		<input type="checkbox"/>	<input type="checkbox"/>			1/19/2018 ConedSplitTest1

This will establish continuity between historical and aggregated meters. Once this is completed, please review the data for any gaps or double-counting and make appropriate changes as required.

3. Rerunning a Request for Aggregated Data

<https://apps.coned.com/NYCBENCHMARK/>

Once a request for aggregated data is processed, the ability to rerun for that calendar year is prohibited by the system. If a rerun is required, there are a few considerations to be addressed prior to that rerun.

- In Portfolio Manager, delete the consumption data associated with the aggregated meters for the year that you are requesting a rerun for. This will ensure that duplicate entries will not take place. And deleting it before the rerun will be easier than after.

Please note: **NEVER delete aggregated meters under any circumstances. Deleting consumption data is permissible but not the aggregated meters since these meters will be used to post consumption data now and in the future.**

- For the Con Edison Portal, you will have to contact the System Administrator at citybenchmarking@coned.com and indicate the authorization id and calendar year you need re-activated. Once re-activated, you will be able rerun the request.

2016	2017	Submit Status	Status Message	Authorization ID	Property ID	Service Address	Borough	Block	Lot	Customer Email	LL 84	LL 87
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Warning	View Status	9	6177860	814 3 AVE	BK	00663	0001	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Warning	View Status	18	6175399	236 1 ST	BK	00968	0001	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Warning	View Status	26	6178632	334 CLEVELAND ST	BK	03968	0003	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Warning	View Status	29	6181186	1360 FULTON ST	BK	01862	0001	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Warning	View Status	35	6181713	26 HILLWOOD COURT	SI	03005	7501	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Warning	View Status	36	6181746	7 ATKINS AVE	BK	03975	0001	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Warning	View Status	39	6186823	1 HANSON PLAC	BK	02111	7501	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Warning	View Status	42		1500 3 AVE	MN	01513	0038	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Warning	View Status	47	6190715	147C EDGEWATER PARK	BX	05514	0122	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	Warning	View Status	52		1818 AMSTERDAM AVE	MN	02082	0028	conedprodself1@gmail...	<input checked="" type="checkbox"/>	<input type="checkbox"/>