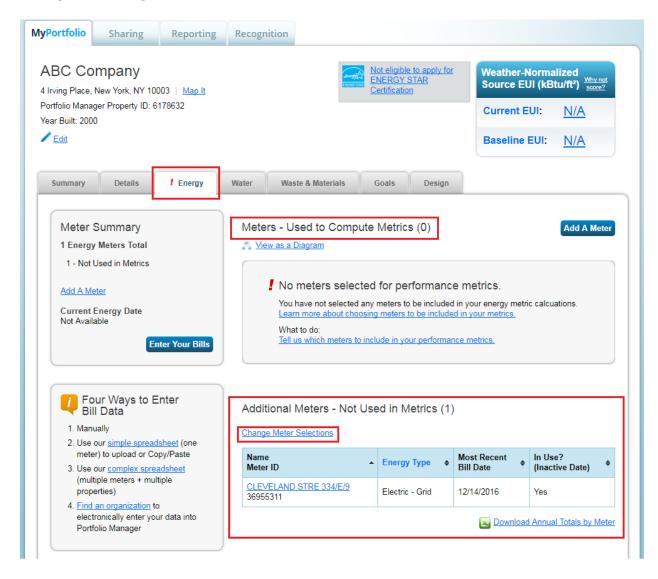# Portfolio Manager Meter Maintenance

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.
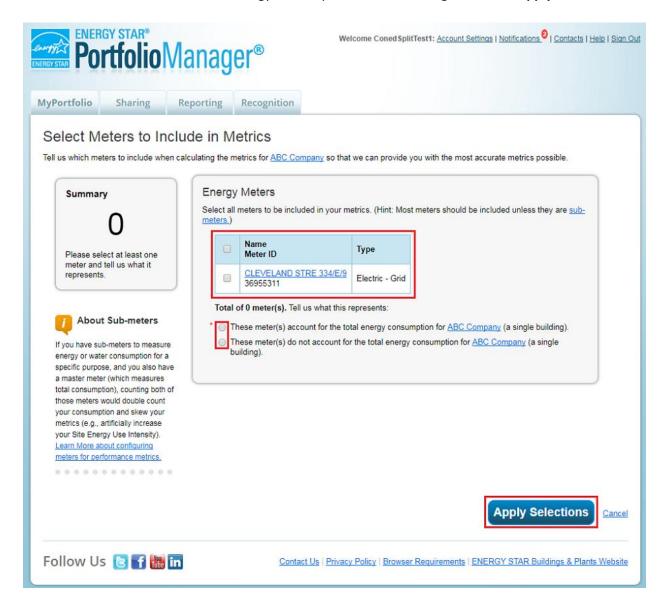
- The meters created by Con Edison are not automatically included in the performance metrics for your building. Follow the instructions in Section 1 to do that (page 2).
- And once those meters are included in your metrics, there may be gaps and overlaps between the historical and aggregated meters. 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).
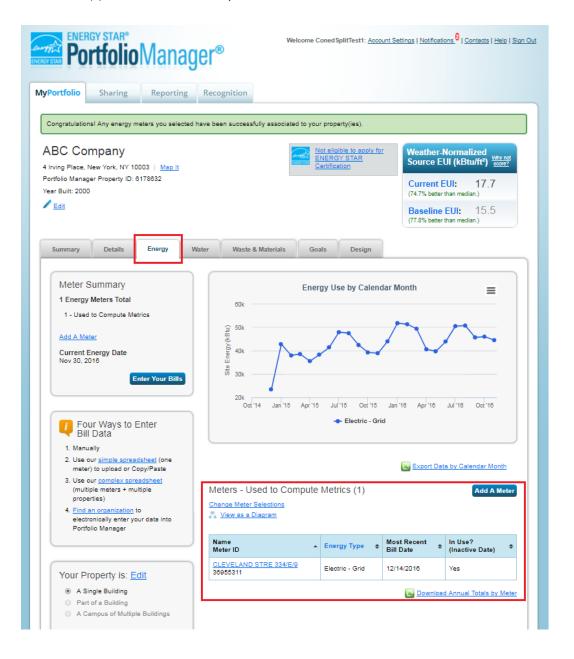
1. Include Meters in My Metrics

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**.

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)

Add A Meter

⛏ View as a Diagram

❗ No meters selected for performance metrics.

You have not selected any meters to be included in your energy metric calcuations.
Learn more about choosing meters to be included in your metrics.

What to do:
Tell us which meters to include in your performance metrics.

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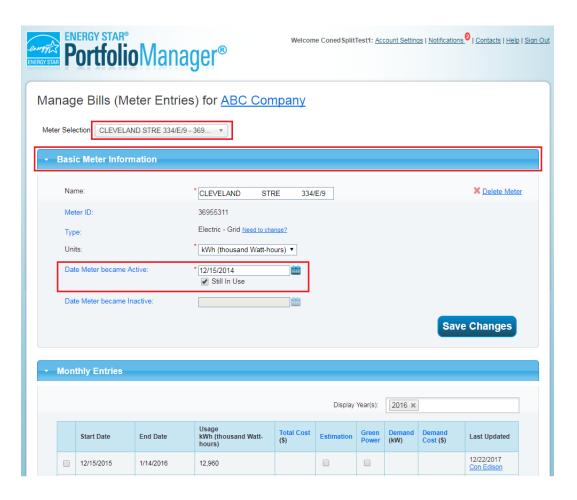
Your meter(s) are now included in your metrics.

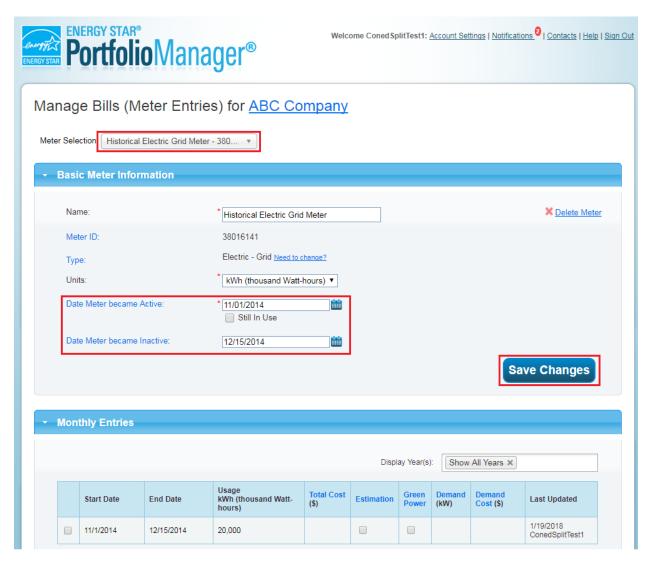## 2. Handling Historical and Aggregated Meters

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.**

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**.

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.