

Portfolio Manager

A How-To Guide for Applicants

A step-by-step process for connecting your account with Tacoma Public Utilities.

Let's get started!

Connect Your Account with TPU

Once logged in, you will need to do at least three activities:

- 1) Create an ESPM account.
- 2) Connect your account with TPU My Consumption to allow TPU to share meter data.
- 3) Add a building and at least 1 power meter to your Portfolio Manager account.

Connect to:

[MyAccount](#)

[Portfolio Manager](#)

www.mytpu.org/portfolio

Connect with TPU

- 1 Click the “Contacts” link in the upper right-hand corner and click add contact.

click here

The screenshot shows the 'My Contacts' page in the Energy Star Portfolio Manager interface. At the top, there's a navigation bar with links like 'Welcome', 'Account', 'Notifications', 'ENERGY STAR', 'Contacts', 'Help', and 'Sign Out'. Below this is a sub-navigation bar with 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main heading is 'My Contacts'. Below the heading is a paragraph explaining the purpose of the contacts page. At the bottom of the main content area, there are buttons for 'Share', 'Edit', 'Delete', 'Add Contact', and 'Add Organization'. A blue callout bubble with the text 'click here' points to the 'Add Contact' button.

click here

- 2 Type “Tacoma Public Utilities” in the Organization field.

The screenshot shows the 'Add Contact' page in the Energy Star Portfolio Manager interface. At the top, there's a navigation bar with links like 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main heading is 'Add Contact'. Below the heading is a paragraph explaining the two ways to add a contact. Below this is a form with fields for 'Name', 'Organization', 'Username', and 'Email'. The 'Organization' field is highlighted with a blue callout bubble containing the text 'type here'. At the bottom right of the form, there are 'Search' and 'Cancel' buttons. A blue callout bubble with the text 'click here' points to the 'Search' button.

click here

This is your TPU utility account you want to link to Portfolio Manager.

Have your 9 digit business partner number handy

- 3 In the search results, look for “TPU MyConsumption” and click “Connect.”

Search Results

The results of your search are listed below. Clicking “Connect” will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria	
Name:	<input type="text"/>
Organization:	Tacoma Public Utilities
Username:	<input type="text"/>
Email Address:	<input type="text"/>
<input type="button" value="Search"/>	

Dave Rotholm Account Executive with Tacoma Public Utilities	<input type="button" value="Connect"/>
Jessica Ludwig Account Executive with Tacoma Public Utilities	<input type="button" value="Connect"/>
[Name obscured] [Title obscured] with Tacoma Public Utilities	<input type="button" value="Connect"/>
TPU MyConsumption Customer Solutions with Tacoma Public Utilities	<input type="button" value="Connect"/>
Terry Coggins Facilities Maintenance Manager with Tacoma Public Utilities	<input type="button" value="Connect"/>

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- 4 In the “TPU BP” field, add your TPU utility Business Partner Number.

Important: You must put in the correct Business Partner Number as this cannot be changed later. Portfolio Manager can only handle one utility Business Partner Number per login. If you don't know your Business Partner Number, log in to MyTPU.org to view your account information.

Send a Connection Request to [TPU MyConsumption](#) to Begin Exchanging Data

[TPU MyConsumption](#) requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [IT Support](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

TPU BP: Example: 409999999
Your Business Partner Number: 9 - 9 Characters [More Information](#)

Terms of Use:

Tacoma Public Utilities is obligated under State law (RCW 19.27A.170) to maintain records of energy consumption data of all non-residential and qualifying public agency buildings to which it provides service. That State law further obligates Tacoma Public Utilities to make such energy consumption data available to the United States Environmental Protection Agency (EPA). Upload of water consumption data is strictly voluntary and may be done at the customer's request.

By sending a Connection Request, you (the Customer) represent that you are the owner or authorized operator of the building(s) for which electric energy and/or water service is provided by Tacoma Public Utilities under the Account(s) identified in the Connection Request.

Agreement: ☐ I agree to my provider's [\(TPU MyConsumption\)](#) Terms of Use.

[Cancel](#)

Confirmation

- 5 You will receive an on-screen confirmation message once the connection request has been sent.

You have successfully sent a connection request to TPU MyConsumption. When TPU MyConsumption has accepted your request, you will be able to share properties and, therefore, authorize this provider to begin exchanging data with your property(ies).

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

Tip

Can't find what you are looking for? Try adjusting your search criteria.

- 6 It will take 24-48 hours for the connection request to finalize, at which time you will receive a notification.

MyPortfolio | Sharing | Reporting | Recognition

View All Notifications (1)

Incoming Requests (0) | Outgoing Requests (1) | Notices (0)

Type	Notification	Date
	You have sent a connection request to TPU MyConsumption . Once they have accepted the request, you will be able to share properties with TPU MyConsumption .	8/30/2019

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Next step:

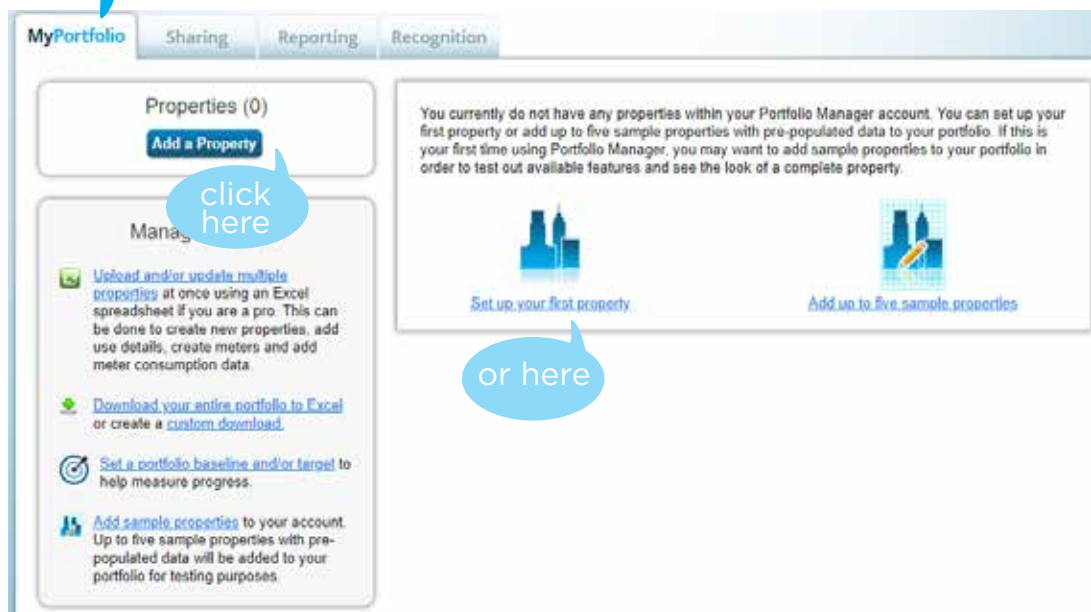
Add a Building to your portfolio

While you are waiting for the connection request to activate, you can set up one or more buildings within your account. Remember all buildings must be affiliated with the same Business Partner Number in order for the automatic sharing requests to function.

Create a Property

- 1 To add a building, click on the “MyPortfolio” tab.

click here




- 2 Select “Add a Property” or “Set up your first property.”

3 Enter basic information about your building and select “Get Started.”

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!




Your Property Type


We'll get into the details later. For now, overall, what does your property serve?

Select a property type

[Learn more about Property Types.](#)

**Tip**

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).



Your Property's Buildings


How many physical buildings do you consider part of your property?

☐ None: My property is part of a larger building.


☐ One: My property is a single building.

☐ More than One: My property consists of multiple buildings ([Campus Guidance](#))

How many?

**Tip**

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.




Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

☒ **Existing:** My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.

☐ **Design Project:** My property is in the conceptual design phase (pre-construction). I will be using Portfolio Manager to evaluate the energy efficiency of the design project.

☐ **Test Property:** This is not a real property. I am entering it to test features, or for other purposes such as training.

**Test Properties**

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this is a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

Get Started! [Cancel](#)

click here

4 Enter specific details about your property.

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: * ... Select ...

Street Address: *

City/Municipality: *

State/Province: * ... Select ...

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(s). Do not include parking. [Details on what to include.](#)

Irrigated Area: Sq Ft

Occupancy: * Select %

fill out form

5 Enter information about how the building is used and select “Add Property.”

▼ Building Use / Edit Name

Other – Education refers to buildings used for religious, community, or other educational purposes not described in the available property uses in Portfolio Manager (i.e. educational purposes other than adult education, college/university, K-12 school, pre-school/daycare and vocational schools).

Gross Floor Area should include all space within the building(s), including classrooms, administrative offices, conference rooms, kitchens used by staff, lobbies, cafeterias, auditoriums, laboratory classrooms, stairways, elevator shafts, and storage areas.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	* Sq Ft		
Weekly Operating Hours			
Number of Workers on Main Shift			
Number of Computers			

include detail

click here

Back Add Property Cancel

6 You should receive an on-screen confirmation message.

Next step:

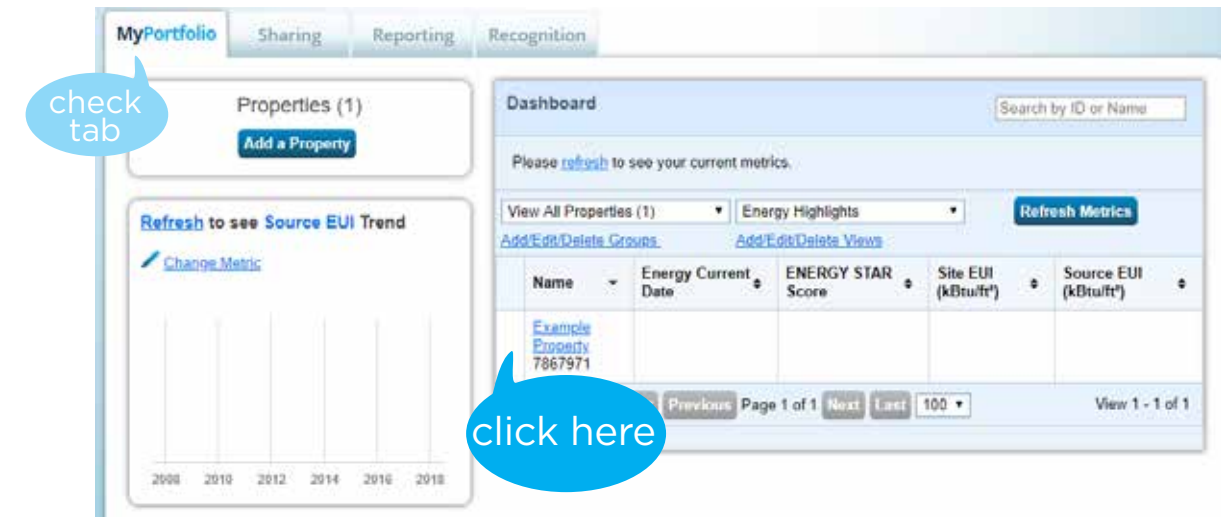
Share a Meter in Portfolio Manager

Note: Some accounts, such as ones with multiple meters per building or multiple buildings per meter, are too complicated for the automated data exchange process.

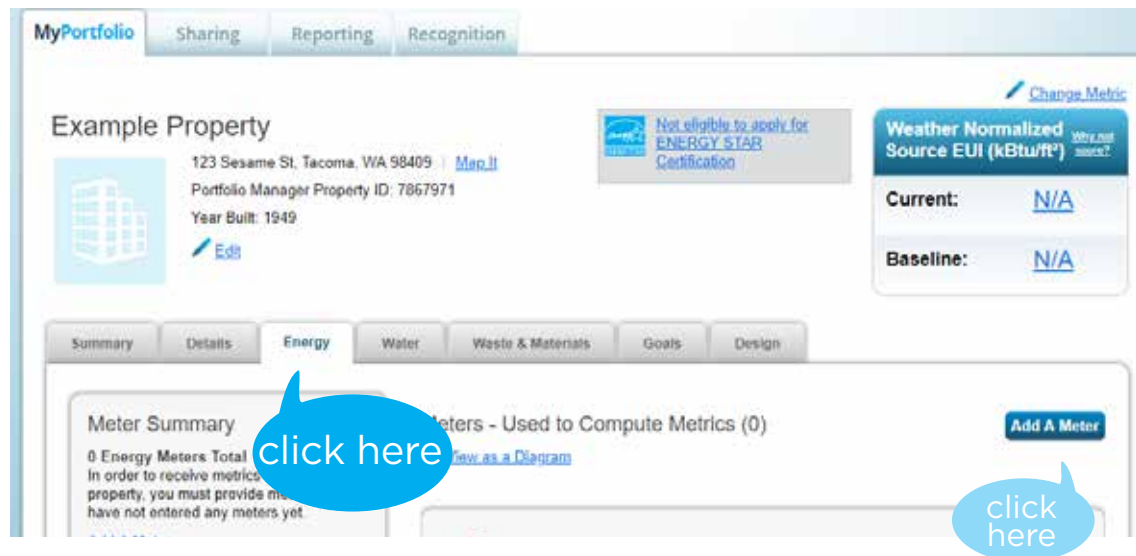
Please contact:
myconsumption@cityoftacoma.org
for assistance.

Add a meter

- 1 Make sure you're on the "MyPortfolio" tab.



- 2 Click on the property name.
- 3 Click on the "Energy" tab in the middle of the page.



- 4 Click on the "Add a Meter" button.

- 5 Enter details about your power meter. For the source of your property's energy, select "Electric" from the menu.

Get Started Setting Up Meters for Example Property

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.

The screenshot shows a web form titled "Sources of Your Property's Energy" with a sub-header "What kind of energy do you want to track? Please select all that apply." The form contains a list of energy sources with checkboxes. The "Electric" checkbox is selected, and a blue callout bubble with the text "click here" points to it. Below "Electric", there are three sub-options: "purchased from the grid", "generated onsite with my own solar panels", and "generated onsite with my own wind turbines". A second blue callout bubble with the text "click here" points to the "purchased from the grid" option. Other energy sources listed include 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), and Other (with a text input field). At the bottom of the form are two buttons: "Get Started!" and "Cancel". A third blue callout bubble with the text "click here" points to the "Get Started!" button. To the right of the form, there are three informational sections: "Tracking Energy" (with a sub-header "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 raw 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" (with a sub-header "If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More.](#)"), and "Automate Your Meter Entries" (with a sub-header "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.](#)").

- 6 Select the style of electric energy. In most cases, it should be "purchased from the grid." Click "Get Started!"

- 7 Click the table to add additional data about your meters.

About Your Meters for Example Property

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

1 Energy Meter for Example Property (click table to edit)

	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Name
<input checked="" type="checkbox"/>	Electric Grid Met	Electric - Grid		kWh (thousan	<input type="text" value="08/01/1998"/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="text" value=""/>

[Delete Selected Entries](#)
[Add Another Entry](#)

Back

Create Meters Cancel

- 8 Select the checkbox at the beginning of the table. For units, select kWh for kilowatt hours (used to measure the electric power that you use). Enter the date your power meter became active.

About Your Meters for Example Property

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

1 Energy Meter for Example Property (click table to edit)

	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Name
<input checked="" type="checkbox"/>	Electric Grid Met	Electric - Grid		kWh (thousan	<input type="text" value="08/01/1998"/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="text" value=""/>

[Delete Selected Entries](#)
[Add Another Entry](#)

Back

Create Meters Cancel

- 9 In the Meter ID 1 Name and the Meter ID 1 Value, enter your power meter number. Select “Create Meters.”

About Your Meters for Example Property

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

1 Energy Meter for Example Property (click table to edit)

	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Meter ID 1 Name	Custom Meter ID 1 Value	Custom Meter ID 2 Name	Custom Meter ID 2 Value
thousan	08/01/1998	<input checked="" type="checkbox"/>		<input type="checkbox"/>	1234	1234		

[Delete Selected Entries](#)
[Add Another Entry](#)

Back

Create Meters

Cancel

- 10 Enter your power usage.
Select “Click to add an entry” and fill in the applicable information.”

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later.

Your Meter Entries for Example Property

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

1 Energy Meter(s) for Example Property

▼ Electric Grid Meter

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
--	------------	----------	---------------------------------	-----------------	------------	-------------	-------------	------------------

[Click to add an entry](#)

[Delete Selected Entries](#)
[Add Another Entry](#)
[Learn how to copy/paste](#)

Upload data in bulk for this meter:

i You can use the single-meter spreadsheet to either: "Upload" the file below, or copy and paste the data from the spreadsheet into the table above ([instructions in this FAQ](#)). Use this single-meter [spreadsheet template](#).

No file chosen

- 11 This screen may only be present if you have more than one meter. Select what your power meter represents and click “Apply Selections.”

MyPortfolio | Sharing | Reporting | Recognition

Your meter entries have been added to your meters!

Select Meters to Include in Metrics

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

Summary
1
Please tell us what your meters represent.

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

Name	Meter ID	Type
<input checked="" type="checkbox"/>	Electric Grid Meter	Electric - Grid

Total of 1 meter(s). Tell us what this represents.

☐ These meter(s) account for the total energy consumption for [Example Property](#) (a single building).

☐ These meter(s) do not account for the total energy consumption for [Example Property](#) (a single building).

Apply Selections [Cancel](#)

- 12 You will be on the meter and energy tab. At the top of the page, click the “Sharing” tab.

- 13 Click “Set Up Web Services/Data Exchange.”

MyPortfolio | **Sharing** | Reporting | Recognition

My Shared Properties
(0)
[Share \(or unshare\) a property](#)
Set Up Web Services/Data Exchange
[Download Sharing Report](#)

Sharing Notifications (0)
You have no new notifications.

More About Sharing
No properties are currently shared between you and [your contacts](#). Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)

14 Under “Share properties for Exchanging Data:”

- 1) **Select Web Services Provider:**
choose “TPU MyConsumption (TPUadmin)”
- 2) **Select Properties:**
choose which properties you’d like to share.
- 3) **Choose Permissions:**
choose “I want to provide different levels of access for each property or to each individual meter within a property.”

Click “Authorize Exchange”

The screenshot shows the 'Share Properties for Exchanging Data' interface. At the top, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Below the tabs, the title 'Share Properties for Exchanging Data' is displayed. A progress bar shows four steps: 'Choose Permissions' (active), 'Set Up Connections', 'Check Existing Permissions', and 'View Results/ Confirmation'. A paragraph explains the purpose of the tool. The main content area is divided into three numbered sections: 1. 'Select Web Services Provider (Account)' with a dropdown menu showing 'TPU MyConsumption (TPUadmin)'. 2. 'Select Properties' with a dropdown menu showing 'One Property' and a button to 'Select Property'. 3. 'Choose Permissions' with three radio button options: 'I want to set permission levels in bulk for all selected properties and meters' (selected), 'Exchange Data Full Access (with full access to all properties and meters)', 'Exchange Data Read Only Access (with read only access to all properties and meters)', 'Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)', 'Remove Access (i.e. remove existing access to all properties and meters)', and 'I want to provide different levels of access for each property or to each individual meter within a property'. At the bottom, there are 'Authorize Exchange' and 'Cancel' buttons. Blue callouts with the word 'select' point to the dropdown menus in sections 1 and 2. A blue callout with the text 'click here' points to the 'Authorize Exchange' button.

MyPortfolio Sharing Reporting Recognition

Share Properties for Exchanging Data

Choose Permissions Set Up Connections Check Existing Permissions View Results/ Confirmation

Sometimes it's really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

1 Select Web Services Provider (Account)

Which web services provider (and account) do you want to share these properties with in order to exchange data? You can select multiple properties at once with a single provider.

Select web services provider

TPU MyConsumption (TPUadmin)

2 Select Properties

Which Properties do you want to share? You can select multiple properties at once while you can share properties that include unsupported meter types, those specific meters will not be shared

One Property Select Property

3 Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

☒ I want to set permission levels in bulk for all selected properties and meters:

☐ Exchange Data Full Access (with full access to all properties and meters)

☐ Exchange Data Read Only Access (with read only access to all properties and meters)

☐ Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)

☐ Remove Access (i.e. remove existing access to all properties and meters)

☒ I want to provide different levels of access for each property or to each individual meter within a property.

Authorize Exchange Cancel

- 15 Under “Share Your Property (ies), select “Exchange Data” radio button.

MyPortfolio

Sharing

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.

4

Select Permissions for Each Contact

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

Sort by: Property Name

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
Annie's test property (6882207)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
TPU MyConsumption	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> Edit

 Some of your contacts already have access to the properties you selected. When you select "Share Property(ies)" their access levels will be changed. No acceptance is required.

Share Property(ies)

Cancel

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.

click here

- 16 Enter your TPU “Contract Account” number at the top of the pop-up screen. Select all three “Full Access” Radio buttons. In the open “Meter Number” boxes, enter your meter number. For “HistoricalCons2,” enter “Y.” It must be a capital “Y” or else the program will not pull in historical data.

The screenshot shows the 'Select Access Permission' form. At the top, there is a text input field for 'Contract Account' with the value '100055555' and an example '109999999'. Below this is a section titled 'Select the permission level below that you would like to grant.' with a table of permissions. The table has columns for 'Item', 'None', 'Read Only Access', 'Full Access', 'Meter Number1', and 'HistoricalCons2'. The 'Full Access' column has three radio buttons selected. The 'Meter Number1' column has a text input field with the value '1234'. The 'HistoricalCons2' column has a text input field with the value 'Y'. Annotations include a blue speech bubble saying 'type here' pointing to the 'Contract Account' field, a blue speech bubble saying 'click here' pointing to the 'Full Access' radio buttons, a blue speech bubble saying 'type' pointing to the 'Meter Number1' field, and a blue speech bubble saying 'type Y' pointing to the 'HistoricalCons2' field.

Item	None	Read Only Access	Full Access	Meter Number1	HistoricalCons2
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
All Meter Information					
Energy Meters					
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	1234	Y
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		

- 17 Scroll down and select the “Share forward” permissions you would like TPU to have. Either option is valid. Select “Apply Selections & Authorize Exchange.”

The screenshot shows the 'Additional Options' section of the form. It contains a table with columns for 'Item', 'None', 'Read Only Access', 'Full Access', 'Meter Number1', and 'HistoricalCons2'. The 'Full Access' column has three radio buttons selected. The 'Meter Number1' column has a text input field with the value '1234'. The 'HistoricalCons2' column has a text input field with the value 'Y'. Below the table, there is a section titled 'Additional Options' with a table of options. The table has columns for 'Item', 'None', and 'Read Only Access'. The 'Read Only Access' column has two radio buttons selected. The 'Item' column has a row for 'Share Forward' with the description 'Allow TPU MyConsumption to share this property with others and give them any permissions including the right to share with more people.' Annotations include a blue speech bubble saying 'select' pointing to the 'Read Only Access' radio buttons, and a blue speech bubble saying 'click here' pointing to the 'Apply Selections & Authorize Exchange' button.

Item	None	Read Only Access
Share Forward Allow TPU MyConsumption to share this property with others and give them any permissions including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

Apply Selections & Authorize Exchange Cancel

Energy Star score

After the share request is complete, you receive an Energy Star score for your building and can view metrics if it meets the Portfolio Manager guidelines.

Add a water meter

To add a water meter, follow similar steps starting on the “Water” tab. The automatic sharing with TPU will only work if both the power and the water meters have the same business partner number.

- 18 On the next screen, select “Share Property(ies)”



- 19 Under “View All Notifications,” you will see confirmation the sharing request has been sent. It takes 24-48 hours for the share request to complete.



Need help?

Email: myconsumption@cityoftacoma.org | Call: 253-502-8891