Portfolio Manager

A How-To Guide for Applicants

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

TACOMA POWER
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]

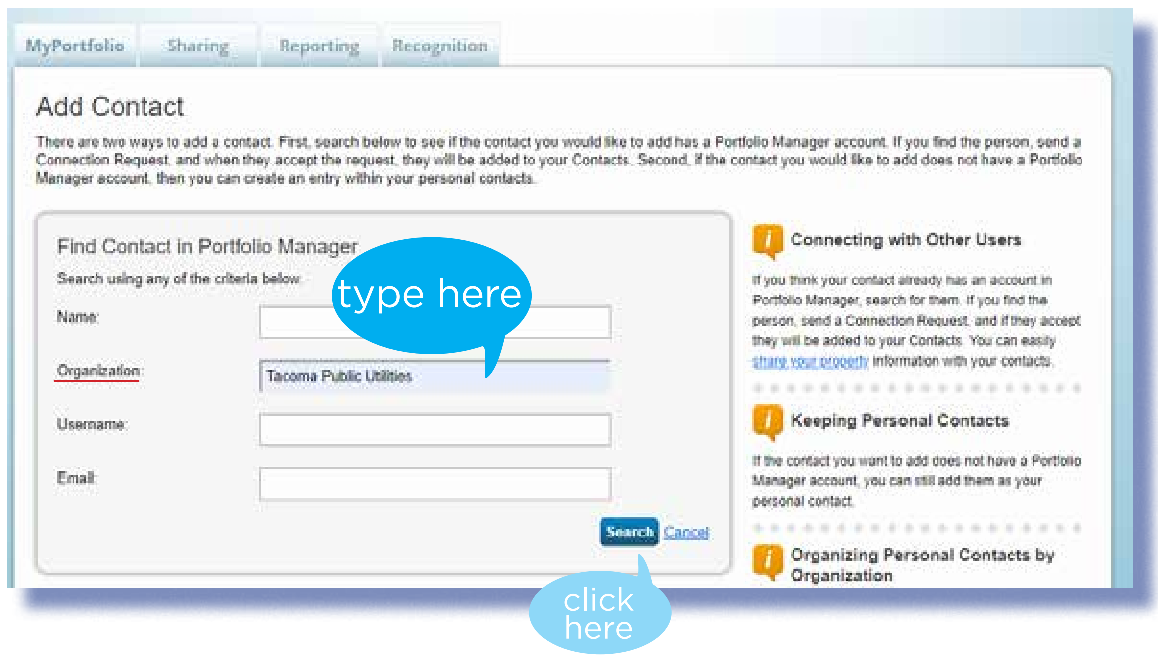
[Portfolio Manager]

[www.mytpu.org/portfolio]

Connect with TPU

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

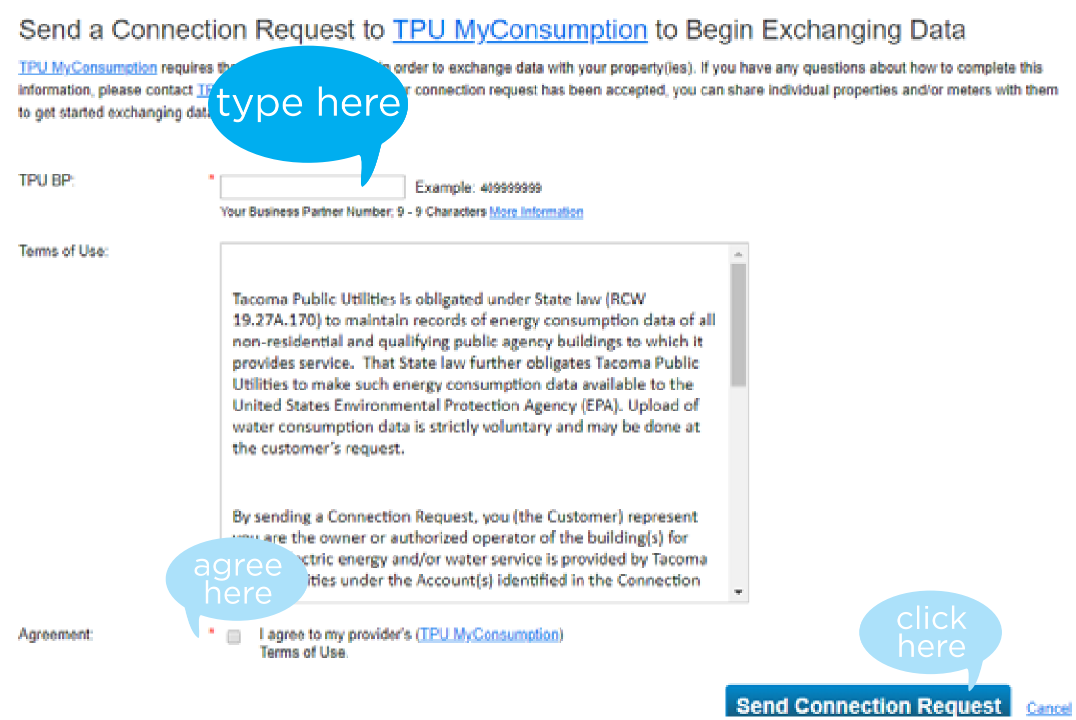
2 Type "Tacoma Public Utilities" in the Organization field.



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

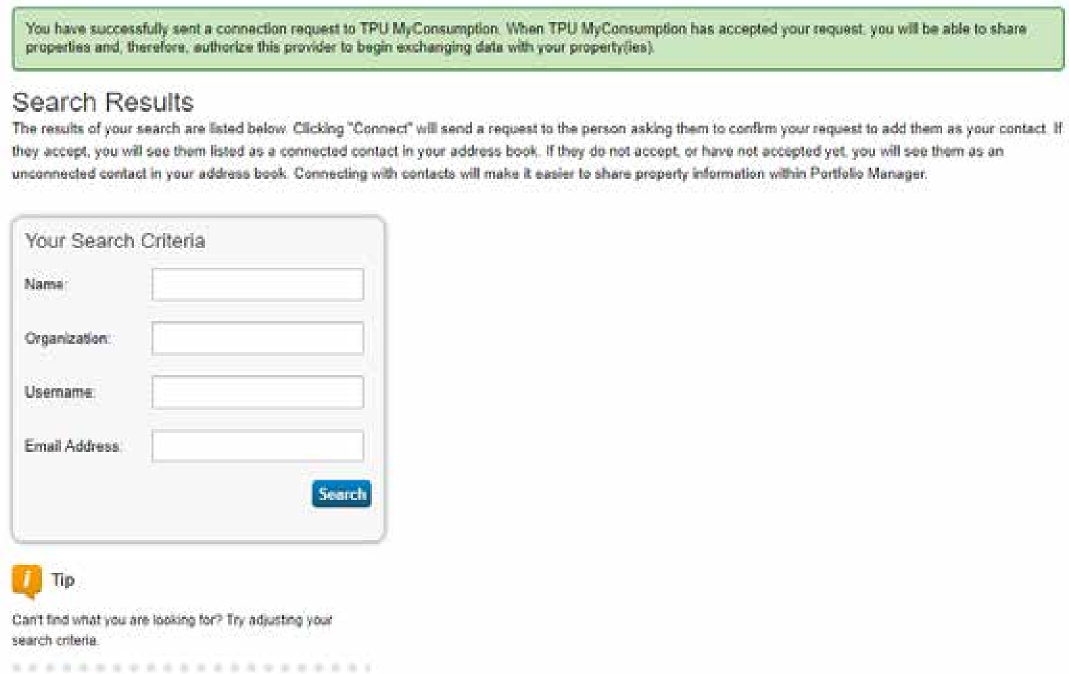
4 In the “TPU BP” field, add your TPU utility Business Partner Number.

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.



Confirmation

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



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

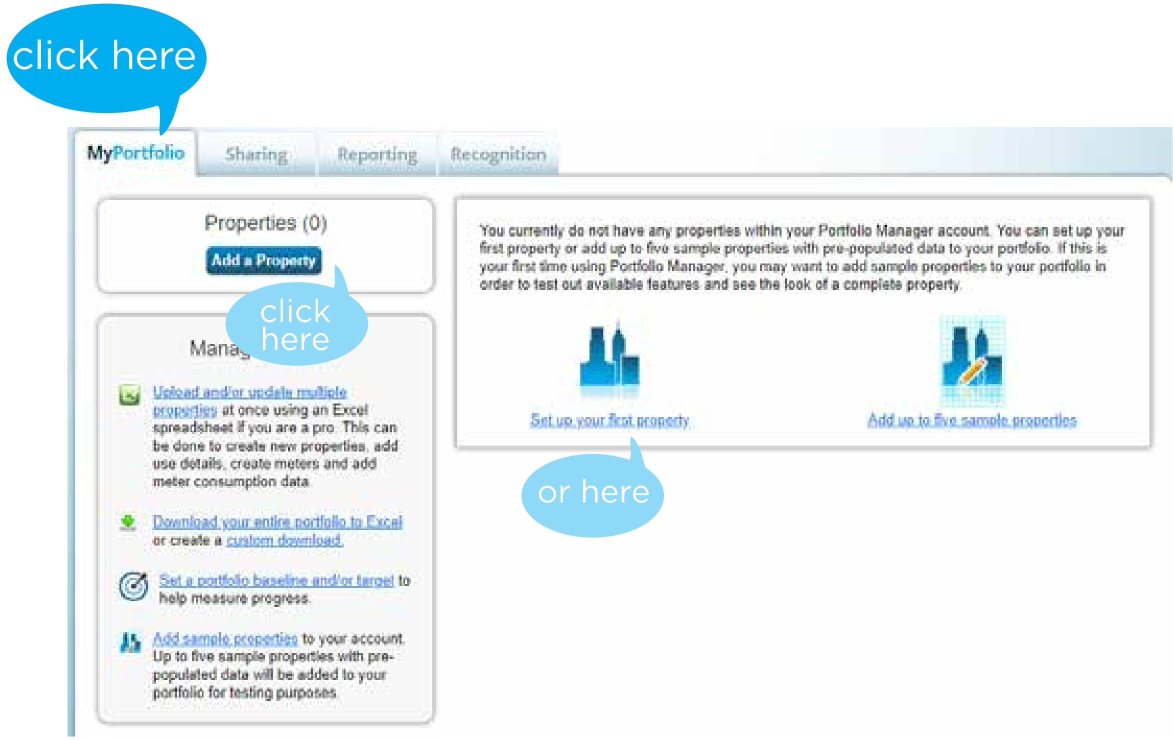
Next step:

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.

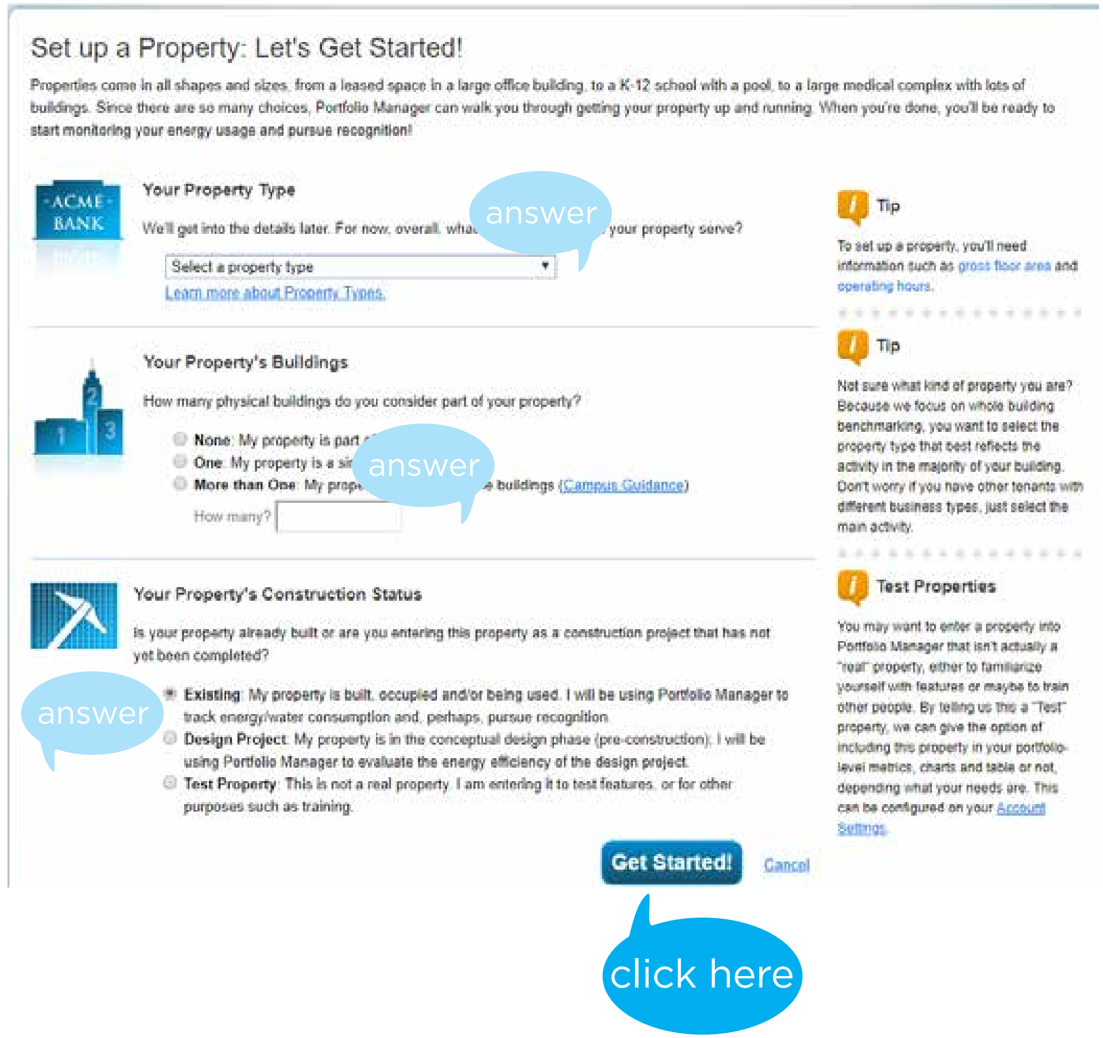
Create a Property

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



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!

ACME BANK

Your Property Type

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

Select a property type

Learn more about Property Types.

Your Property's Buildings

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

- **None**: My property is part ...
- **One**: My property is a si...
- **More than One**: My prop... buildings (Campus Guidance)

How many?

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.

Get Started! Cancel

Tip

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

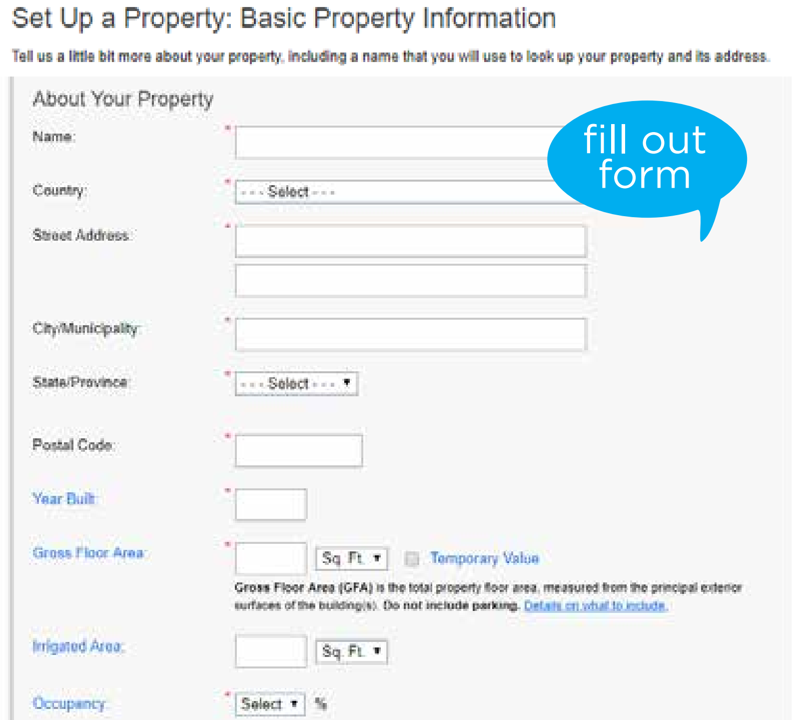
Tip

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.

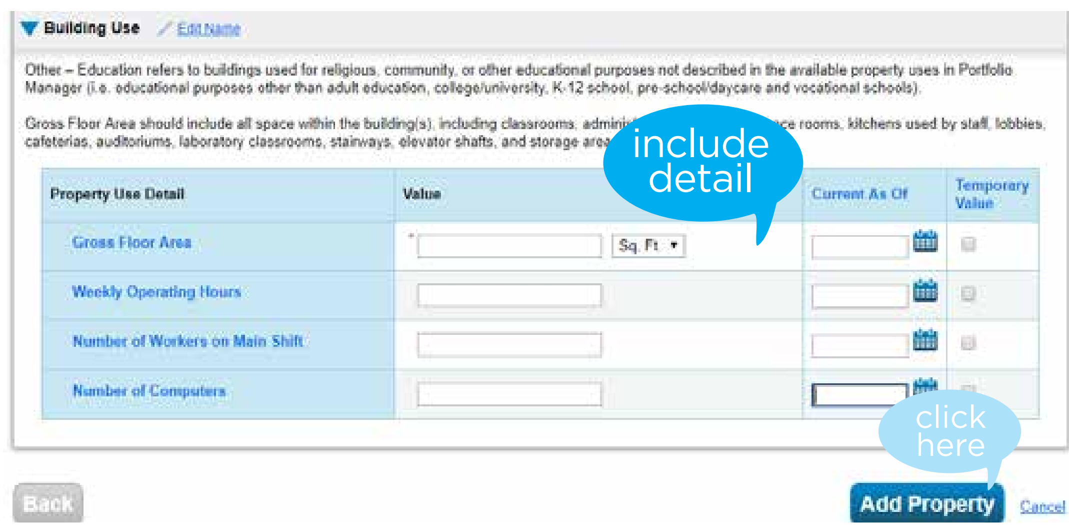
Test Properties

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 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.

4 Enter specific details about your property.



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



6 You should receive an on-screen confirmation message.

Next step:

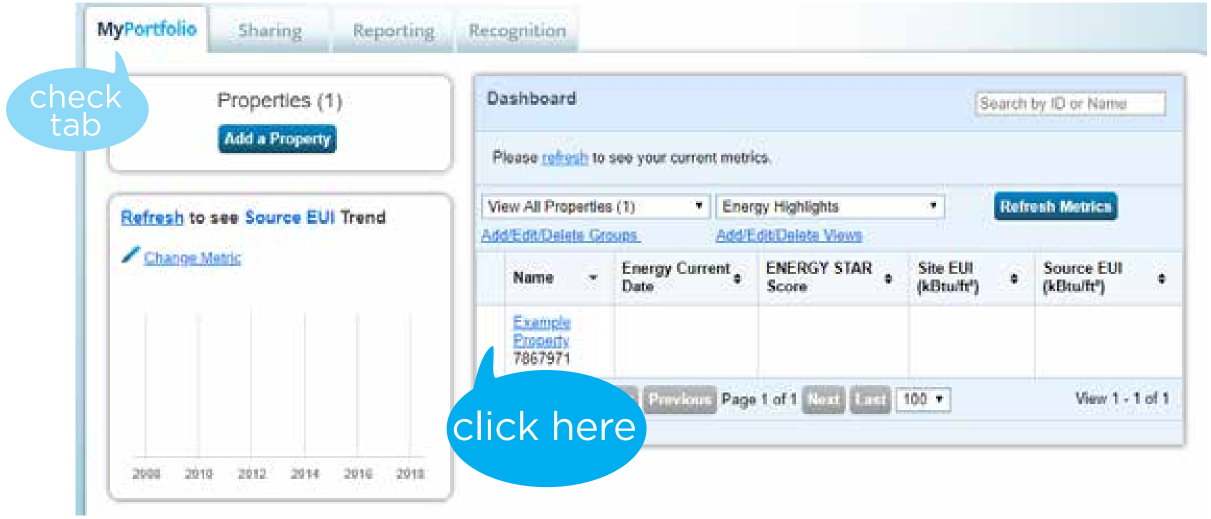
Share a Meter in Portfolio Manager

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.

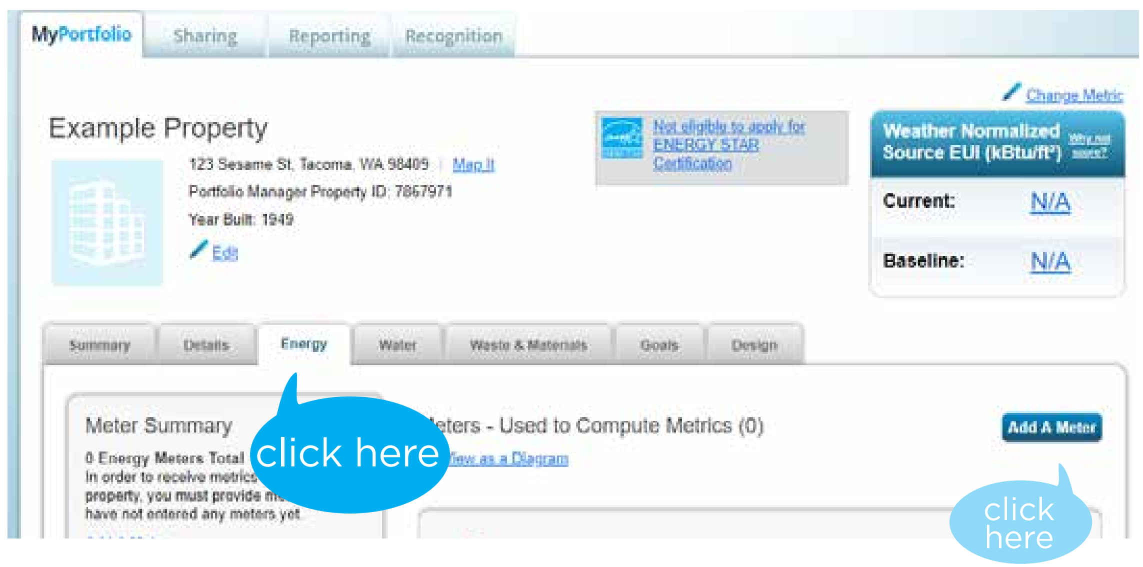
Add a meter

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



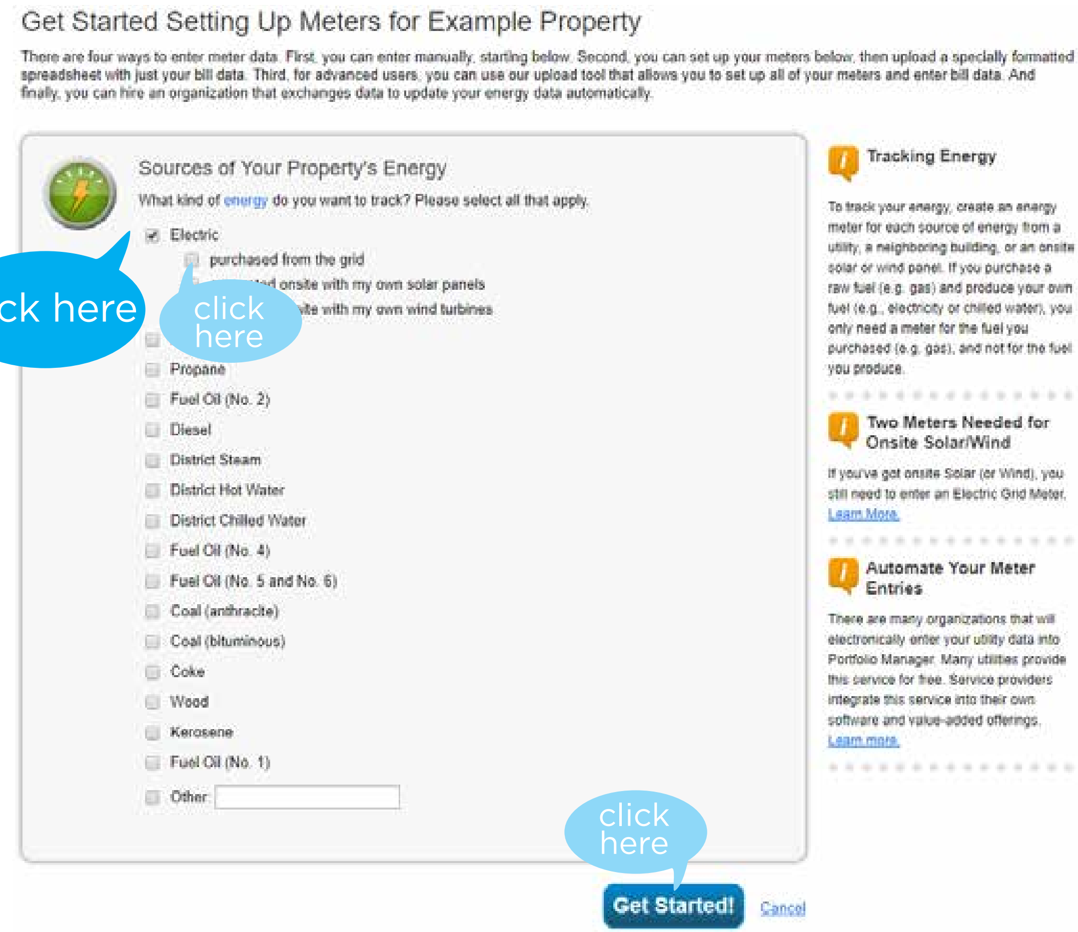
2. Click on the property name.

3. Click on the "Energy" tab in the middle of the page.



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

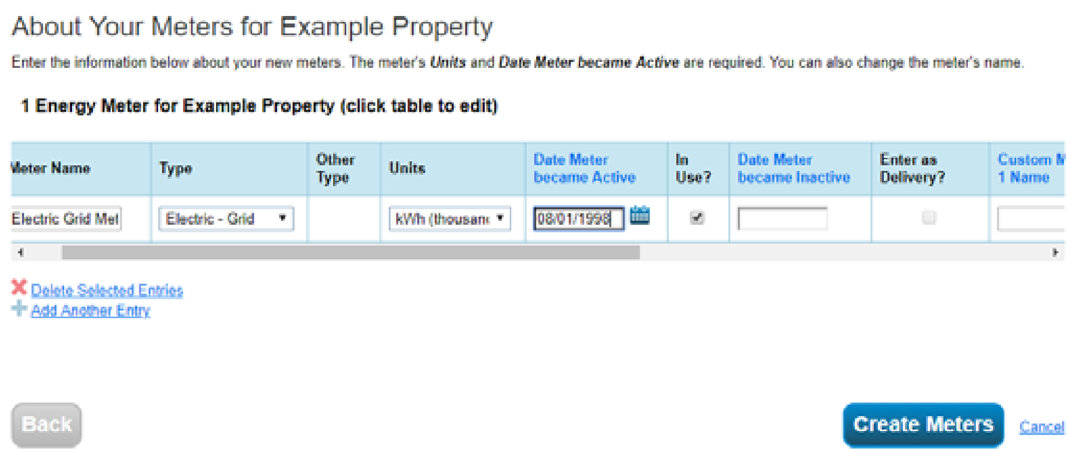
5 Enter details about your power meter. For the source of your property’s energy, select “Electric” from the menu.



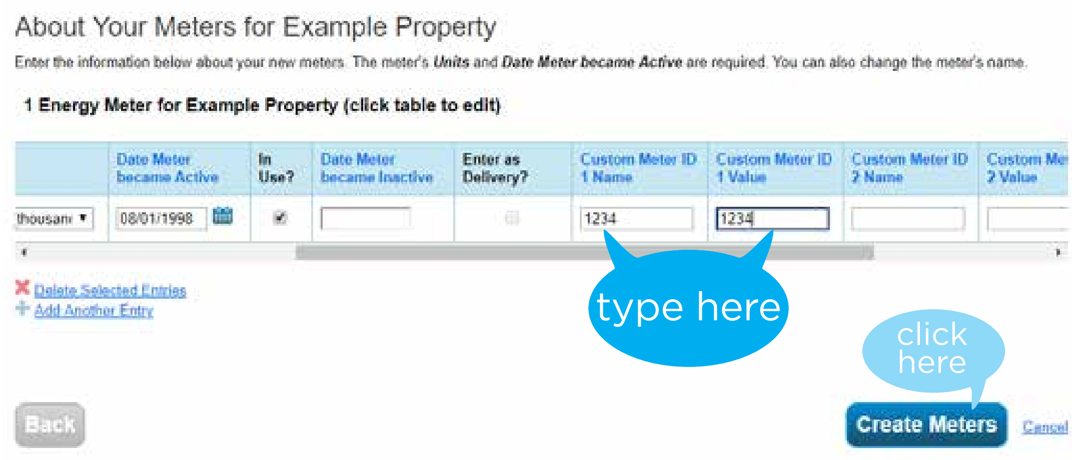
6 Select the style of electric energy. In most cases, it should be “purchased from the grid.” Click “Get Started!”

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

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.

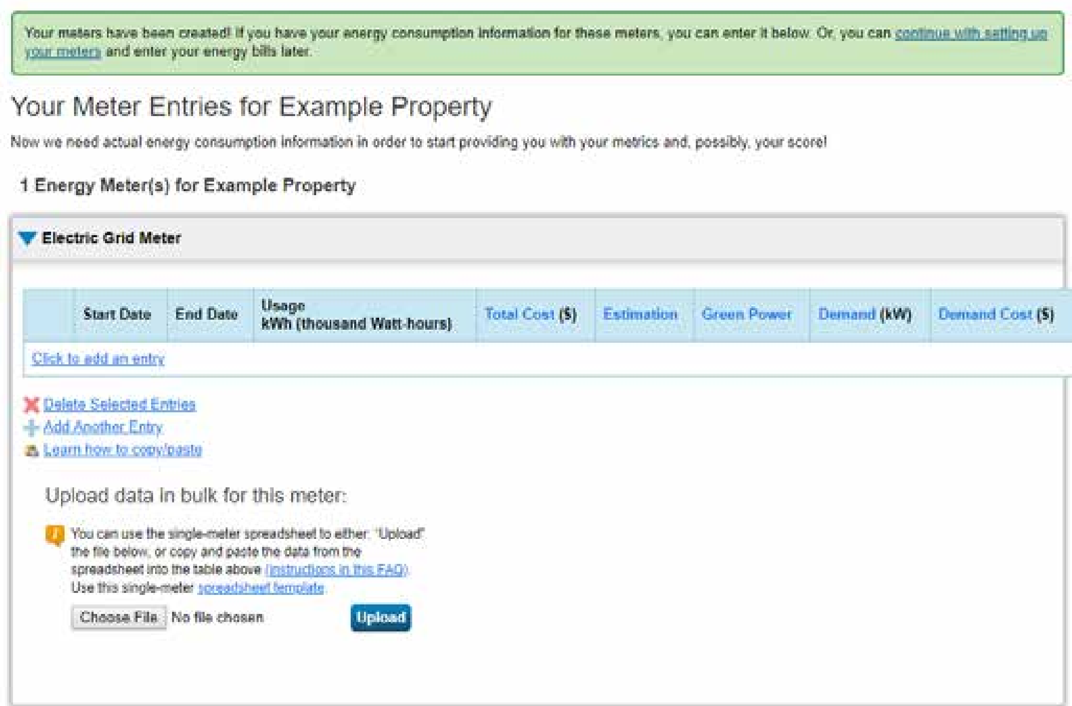


9 In the Meter ID 1 Name and the Meter ID 1 Value, enter your power meter number. Select “Create Meters.”

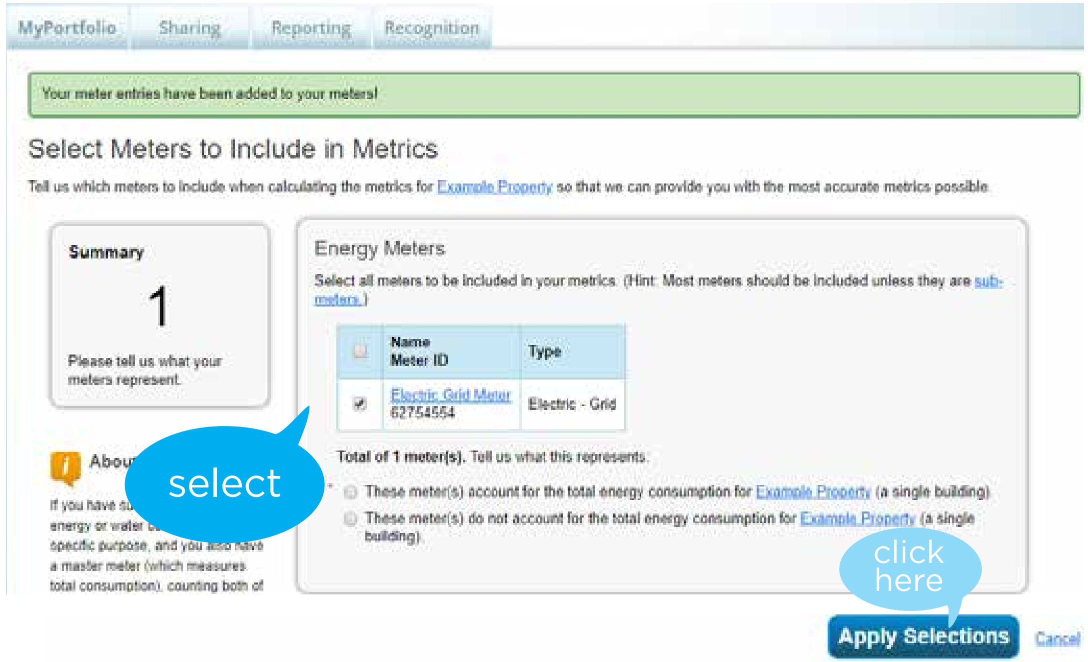


10 Enter your power usage.

Select “Click to add an entry” and fill in the applicable information.”



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



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.”

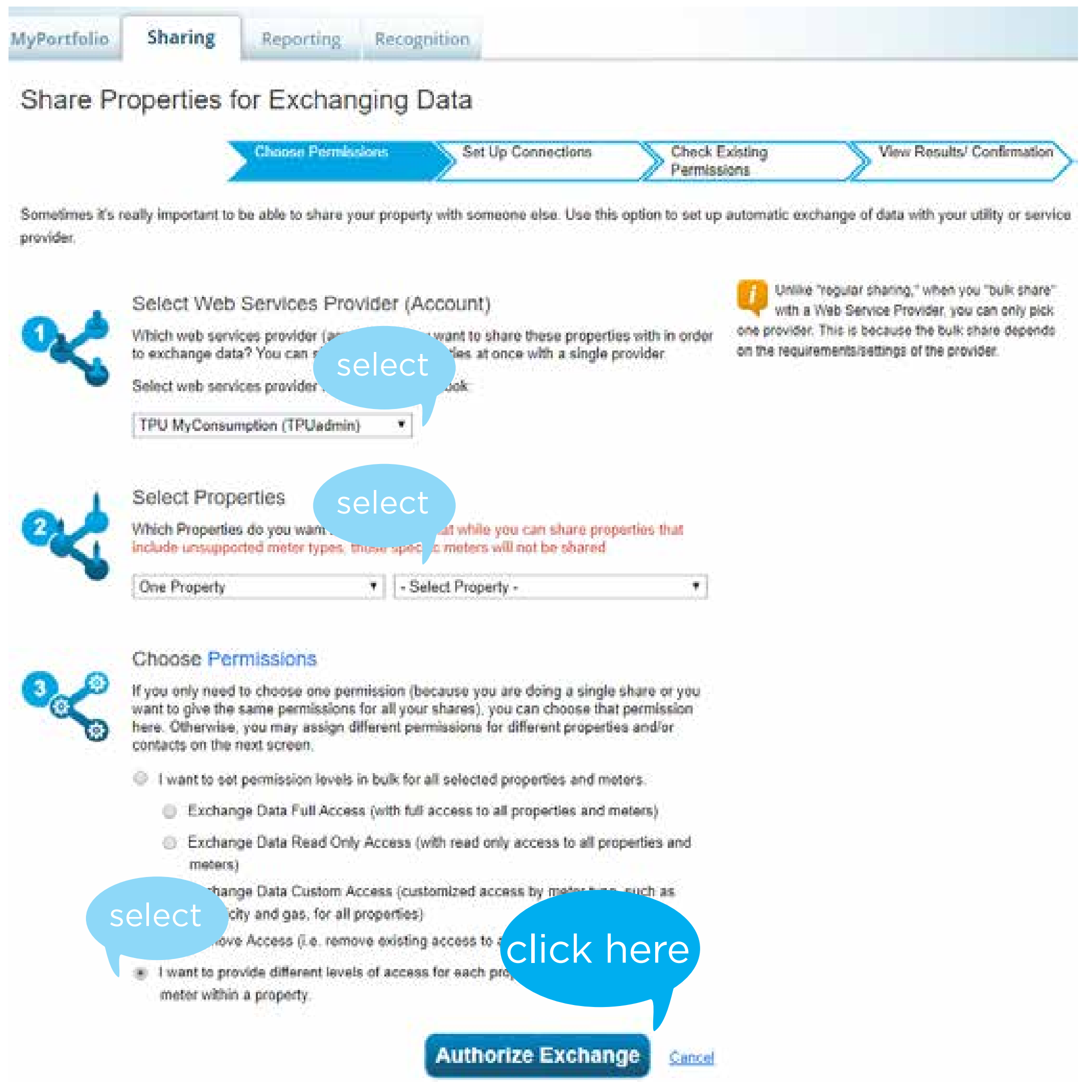
14 Under "Share properties for Exchanging Data:"

1) **Select Web Services Provider:**
   choose "TPU MyConsumption (TPUadmin)"

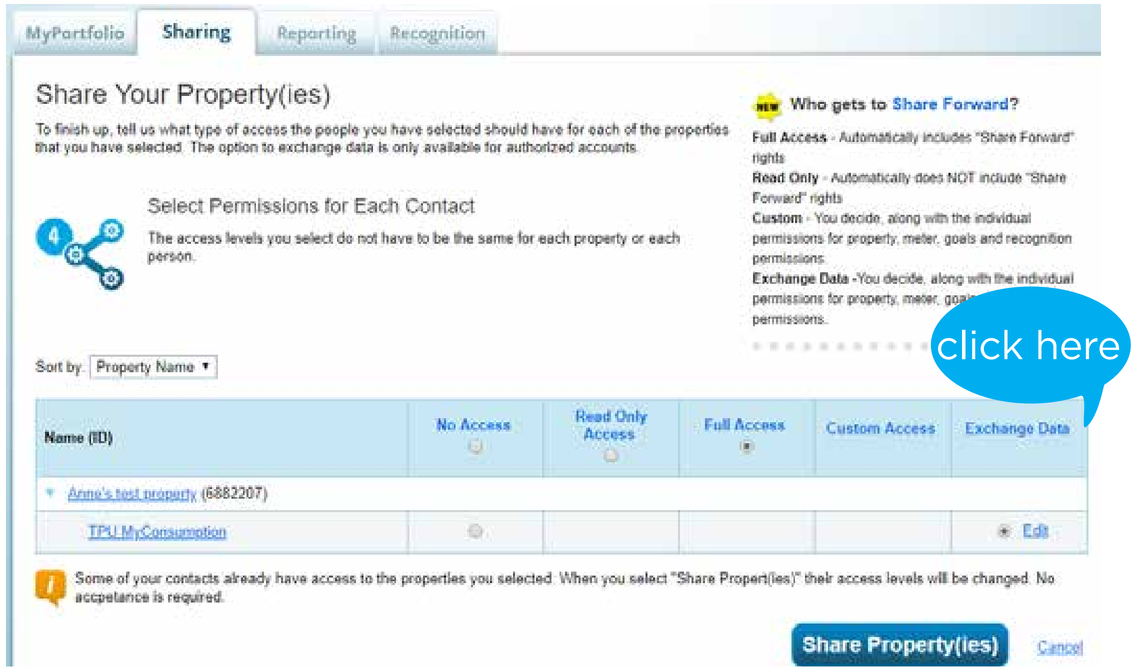
2) **Select Properties:**
   choose which properties you'd like to share.

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"



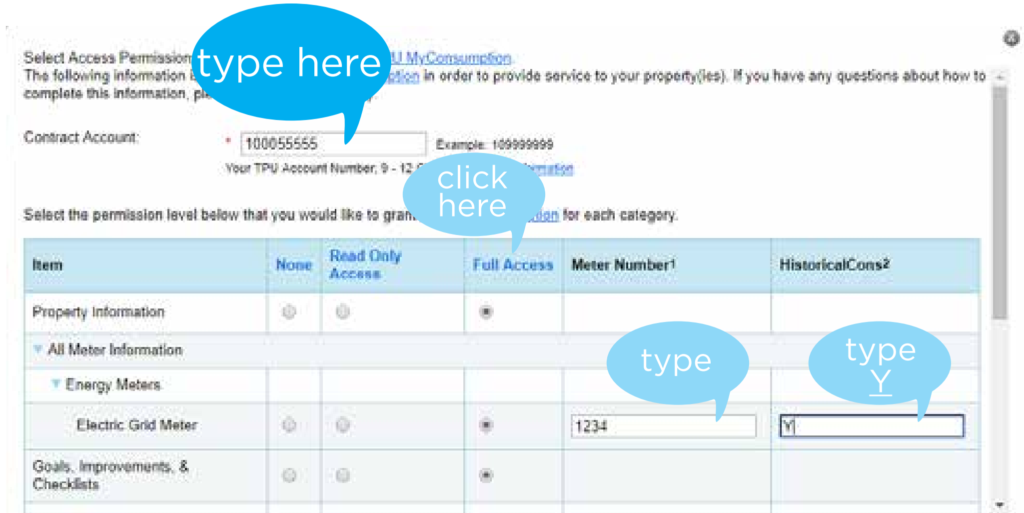
15 Under “Share Your Property (ies), select “Exchange Data” radio button.



16 Enter your TPU “Contract Account” number at the top of the pop-up screen. Select all three “Full Access” Radio buttons.

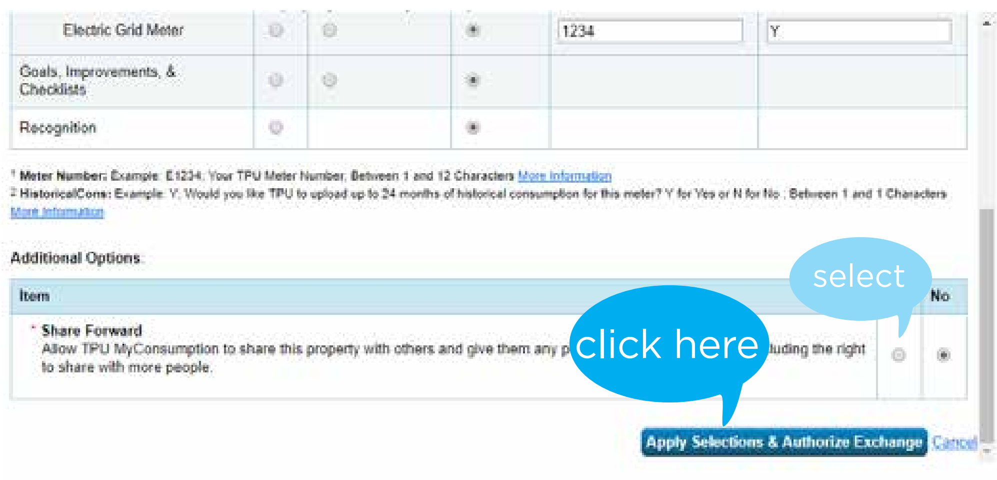
In the open “Meter Number” boxes, enter your meter number.

For “HistoricalCons2,” enter “Y.” It must be a capital “Y” or else the program will not pull in historical data.



17 Scroll down and select the “Share forward” permissions you would like TPU to have. Either option is valid.

Select “Apply Selections & Authorize Exchange.”



Energy Star score

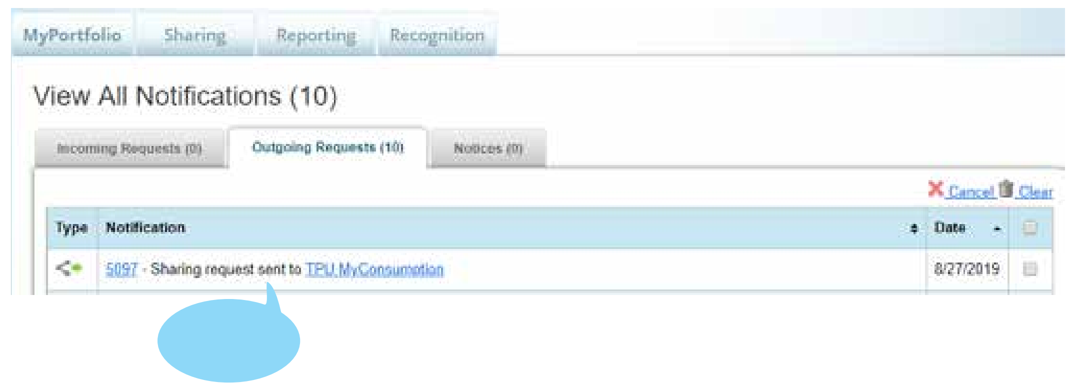
After the share request is complete, you receive an Energy Star score for your building and can view metrics if it meets the Portfolio Manager guidelines.

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**