



How-To Guide: ENERGY STAR® Portfolio Manager Setup and NW Natural Data Sharing

This guide walks you through setting up your ENERGY STAR® Portfolio Manager account, linking your property to NW Natural, and sharing your data to start automated building benchmarking.

For additional guidance, visit <https://www.energystar.gov/buildings/benchmark/get-started>.

Step 1. Create Your ENERGY STAR Portfolio Manager Account

- a. Go to the ENERGY STAR Portfolio Manager website to create an account:

<https://portfoliomanager.energystar.gov/pm/signup>

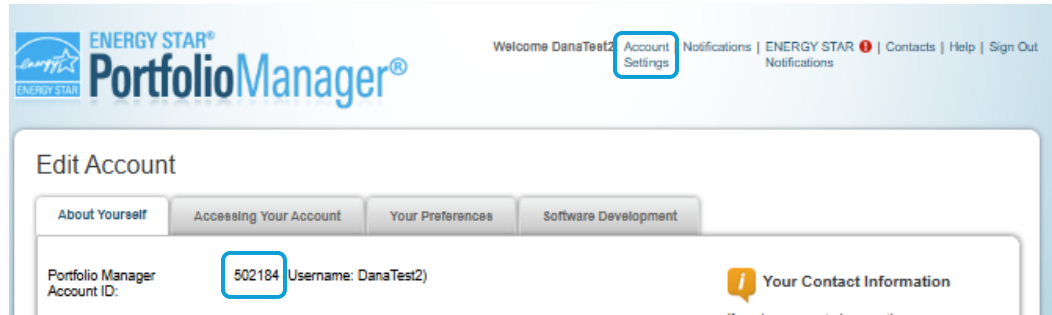
A screenshot of the "Accessing Your Account" form. It contains three input fields: "Username:" with the value "DanaTest2" and a green checkmark indicating "Name Available!"; "Password:" with a masked password "*****" and a green checkmark indicating "Secure"; and "Confirm Password:" with a masked password "*****" and a green checkmark indicating "Passwords Match". Below the password fields, there is a note: "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.)."

- b. Enter your professional or business contact information.
- c. Fill out the "About Your Organization" fields and select "Yes" to make your Account and Usernames searchable by other Portfolio Manager users.

A screenshot of the "About Your Organization" form. It contains three input fields: "Organization Name:" with the value "Energy Masters"; "Primary Business or Service of Your Organization:" with a dropdown menu showing "Service and Product Provider/Consultant"; and "Is your organization an ENERGY STAR Partner?" with radio buttons for "Yes" and "No", where "No" is selected.

- d. When prompted for an Account Name, use your company or property management organization name. This name should be recognizable and searchable.
- e. Complete the identity confirmation steps and create the account.

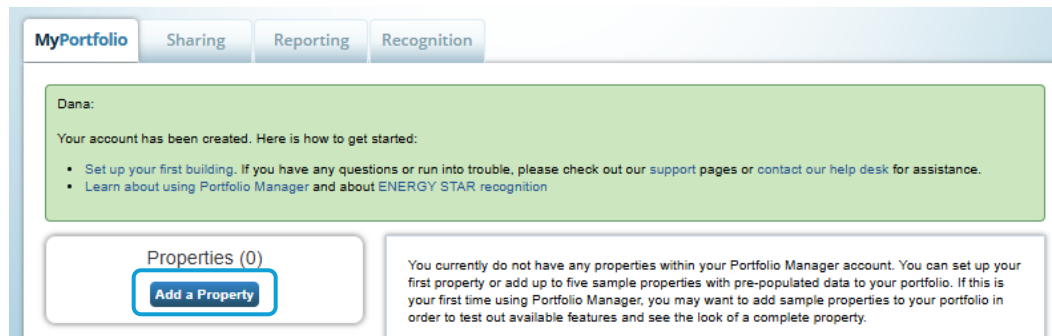
- f. Check your email and confirm your account.
- g. **After logging in, go to Account Settings and make a note of your Portfolio Manager Account ID. You will be asked to provide this to NW Natural later.**



Step 2. Add Your Property

Each property or building that will be benchmarked must be entered separately.

- a. From the main menu, select My Portfolio.
- b. Choose Add a Property.



- c. Enter the property name and address.
 - If your site has multiple buildings and each requires separate benchmarking, create one property per building.
 - Example: Tracy Campus has ten buildings, and the owner wants an aggregate of each building. Set up an account named Tracy Campus building 1, Tracy Campus building 2, etc.
 - If you are benchmarking the entire site together, create a single property for the full campus.
- d. Complete the required property details, such as Gross Floor Area (GFA), Year Built, Occupancy, etc.

- You can use default or temporary values at this time and enter more accurate data later.
Note: Hover the mouse over or click the Use Detail to see a definition.

e. Input Standard IDs, if applicable.

- For City, only Portland
- For County, none
- For State, State of Washington
- Standard ID, e.g. HUD Property, LEED, etc.

f. Save the property.

g. You are finished with this step when the property appears in your portfolio.

Step 3. Create an Aggregate Natural Gas Meter

An aggregate meter is required for NW Natural benchmarking.

- Open the property you just created.
- Go to the Energy section and select Meters.
- Choose Add a Meter.
- Select Natural Gas. Enter “1” in the “How Many Meters?” field.

Sources of Your Property's Energy

What kind of energy do you want to track? Please select one.

Electric

Natural Gas

How Many Meters?

e. Name the meter exactly “NWN AGGREGATE”. It must be in uppercase.

About Your Meters for Tracy Condos East

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 Tracy Condos East (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Meter ID 1 Name
<input type="checkbox"/>	NWN AGGREGATE	Natural Gas		therms	5/01/2009	<input checked="" type="checkbox"/>		<input type="checkbox"/>	

- f. Select the meter again, and navigate to Manage Bills (Meter Entries).
- g. Enter the basic meter information.
- h. Select the option indicating this is an aggregate meter.

Meter Selection:

Basic Meter Information (Click on the arrow to the left to expand this section)

Name: [Delete Meter](#)

Meter ID: 25741988

Type: Natural Gas [Need to change?](#)

Units:

Date Meter became Active: [Calendar](#)

Still In Use

Date Meter became Inactive: [Calendar](#)

Is this an Aggregate Meter?: No Yes

[View/Edit Individual Meters](#)

Custom Meter IDs: None [Add Another Custom Meter ID](#)

- i. Do not enter individual tenant or premise meters. This meter represents combined usage only.
- j. You are finished when the NWN AGGREGATE meter appears under the property.

Step 4. Connect With NW Natural

This step allows NW Natural to associate the correct service locations with your aggregate meter.

- a. Select Add New Contacts/Connections.
- b. Search for "NW Natural" in Contacts within Portfolio Manager. Make sure to choose NW Natural Admin Web Services (NWNWEBSRV).
- c. Select Connect to request a connection with NW Natural.

Your Search Criteria

Name:

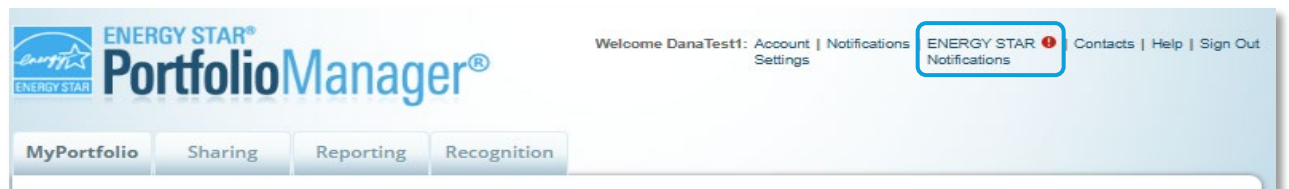
Organization:

Username:

Email Address:

NW Natural Admin Web Services Account (NWNWEBSRV) Developer with NW Natural		<input type="button" value="Connect"/>
<input type="button" value="Previous"/>	Page 1 of 1	<input type="button" value="Next"/>
		1 - 1 of 1

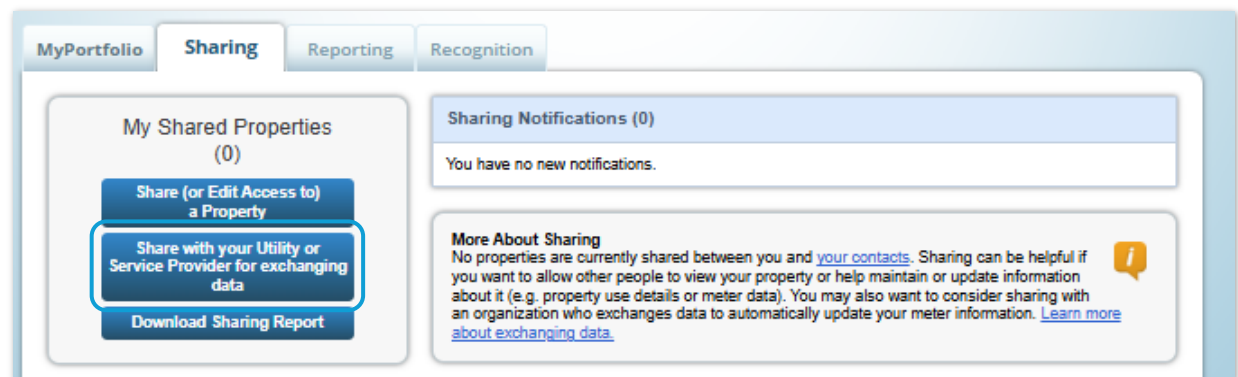
- d. Select Send Connection Request.
- e. NW Natural will review and accept the request. You will receive a notification once it is approved in your Portfolio Manager account.
- f. **PAUSE HERE: Do not proceed with step #5 until you have received notification that NW Natural has approved your connection request.**




Step 5. Share Your Property with NW Natural

Once you have received notification that NW Natural has approved your connection request, you may proceed to sharing your property. Sharing enables automated data exchange.

- a. Open your property.
- b. Go to the Sharing section.



- c. Select Share a Property.
- d. Choose NW Natural from your contacts.
- e. Grant the requested permissions, including energy use data, meters, and property details.



Choose Permissions

If you only need to choose one permission (because you are giving 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.

- Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.
 - 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)
- Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

Authorize Exchange
Cancel

- f. Submit the sharing request.
- g. You are finished when NW Natural appears as having access to the property and you receive a notification that the share was accepted.

Choose Permissions

Set Up Connections

Check Existing Permissions

View Results/ Confirmation


✔ **Congratulations!** You have successfully shared/edited access to your property(ies).

A total of 1 share requests were sent.

If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

Step 6. Complete and Submit Usage Data Request and Tenant Release Forms (if applicable)

- a. Complete and submit the [Natural Gas Usage Data Request Form](#).
 - You will need the property address, your ENERGY STAR Portfolio Manager Account ID number, and the property ID for each property associated with that account.



Tracy Campus

456 Main St, Gresham, OR 97030 | [Map It](#)

Portfolio Manager Property ID: 19957356

Year Built: 2009

[Edit](#)

- h. Property owners with 1-2 separately metered commercial tenants or 1-4 separately metered residential tenants must submit a signed [Tenant Release Authorization Form](#) from each tenant in order for NW Natural to release their natural gas usage information.
- i. Once you complete the form(s), save them for your records and email them to BenchmarkingBuilding@nwnatural.com to receive aggregated energy data through your ENERGY STAR Portfolio Manager Account.

Providing this information ensures the correct data is associated with your property.

Final Confirmation

- ✓ Before considering setup complete, confirm that: You can log in to ENERGY STAR Portfolio Manager.
- ✓ Your property or properties are set up correctly
- ✓ Each property has a meter named NWN AGGREGATE
- ✓ The property is shared with NW Natural
- ✓ NW Natural has accepted the share

Once these steps are complete, no further action is required. The first energy usage data exchange will occur within 30 days of NW Natural accepting your property share. Going forward, NW Natural will automatically exchange data with ENERGY STAR Portfolio Manager on a monthly basis.