

Automated Benchmarking

Getting Started Guide

Sponsored by the Columbus Department of
Public Utilities

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About Automated Benchmarking

Automated Benchmarking is a no cost service for Columbus Department of Public Utilities commercial customers. Enrollment is simple - it should only take a few minutes - and provides you with 36 months of historical energy and water usage, data visualization, an established ENERGY STAR® profile (commercial) or Energy Utilization Index (EUI) (industrial) to benchmark your building performance, and tools to help you track and manage your energy and water use.

What to Expect

There are five main steps to enrolling in Automated Benchmarking:

1. Establish an account (email address, password, etc.)
2. Agree to the Terms and Conditions - most importantly, confirming that you are an authorized representative of the organization that you are enrolling
3. Link to an existing ENERGY STAR Portfolio Manager account or create a new one with an easy Automated Benchmarking set-up wizard
4. Provide details on your building(s) like the property use, square footage and year built
5. Connect with your Columbus Department of Public Utility accounts by providing account information and verifying billing data to start importing your energy usage history

Getting Started

Before you begin, please make sure to have the following information ready to go for each utility account:

1. One current and one previous utility bill
2. The account number
3. The account service address

This information will allow you to enroll in the program, view 36 months of historical energy usage and visualize data usage trends.

In order to obtain an ENERGY STAR score and benchmark your performance against other similar buildings, you will also need:

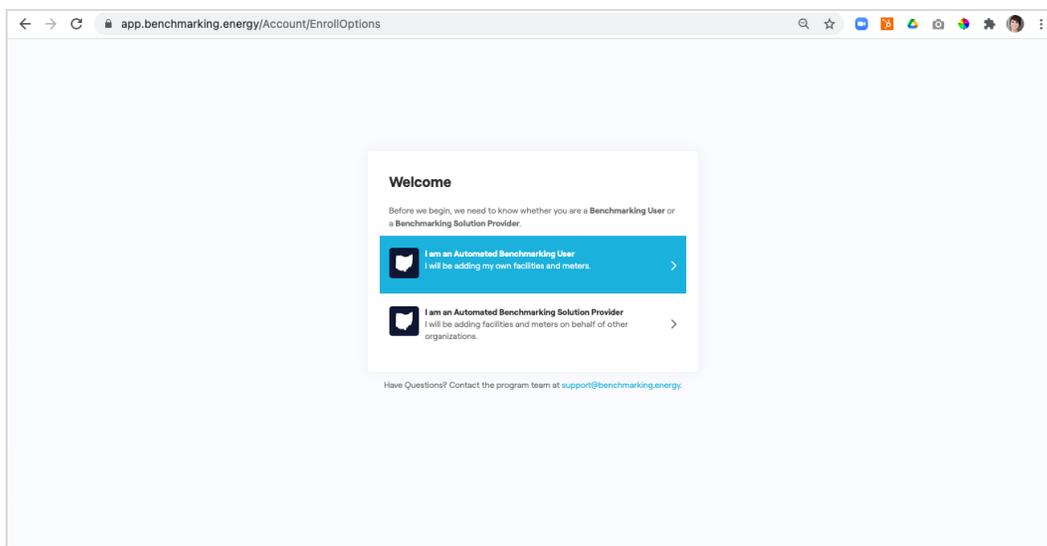
1. Property information
 - a. Building type (e.g. office, retail, etc.)
 - b. Name, street address, ZIP/postal code

2. Property type data¹
 - a. Gross floor area
 - b. Year built
 - c. Optional: Use details (e.g., number of workers, operating hours, etc.)

1. Establish an Account on Automated Benchmarking

This section describes the process for a utility account owner to establish an account and link to their utility accounts. If you are a third party acting on behalf of an account owner, please visit the section on Solution Providers.

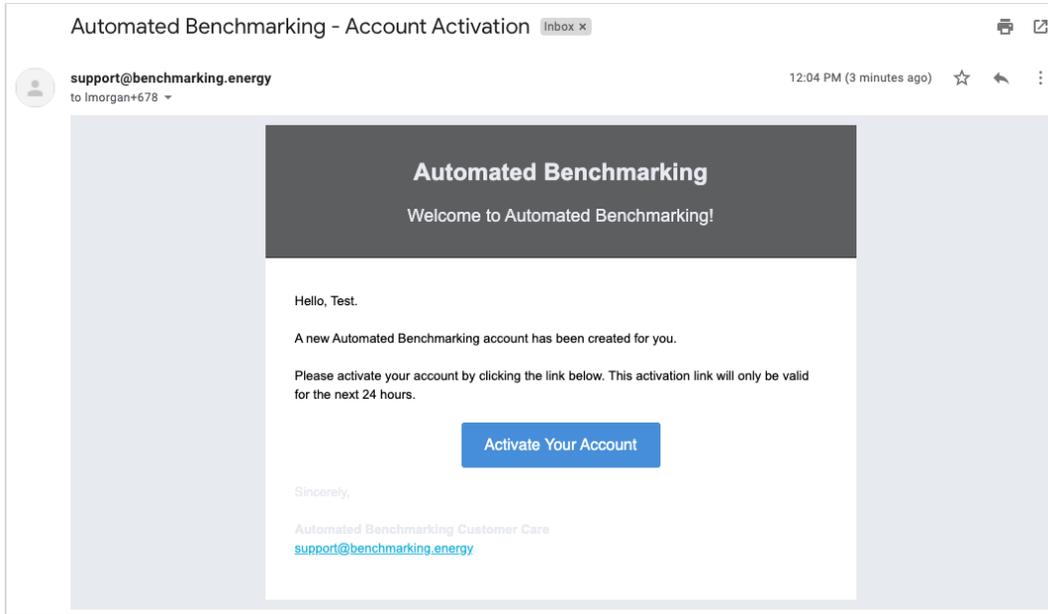
1. Navigate to <https://www.benchmarking.energy/>. Click on the “Sign Up” button on the top right corner of the landing page. Select the “I am an Automated Benchmarking User” option and fill out the enrollment form. Be sure to check the “I agree to the Terms of Use and Privacy Policy.” You can review the Terms of Use and Privacy Policy by clicking directly on the blue text. Once complete click the “Create a New Account” button. You should receive a notification saying, “Your new account was successfully created. You will receive an Account Activation email shortly.”



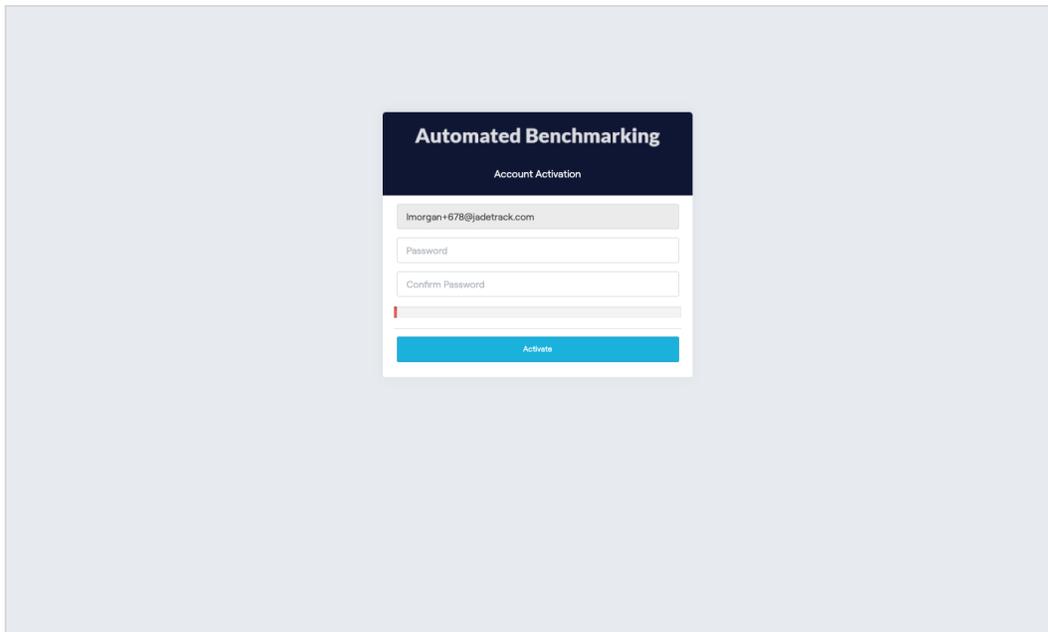
2. Check your email account for an email from support@benchmarking.energy with the subject, “Automated Benchmarking - Account Activation.” Click on the “Activate Account” button. Be sure to check your spam or junk folder if you cannot find the email.

¹ For a full list of building-specific data needed, visit <https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet>

This link is only valid for 24 hours. If you have passed the activation window, click on the “Need to reset your password?” link on the sign-in page and follow the prompts.



3. You will be taken to a screen to create a password. Passwords must contain at least 8 characters, one uppercase character, one lowercase character, one number and one special symbol. Enter your password twice to confirm there aren't any typos and click the “Activate” button.

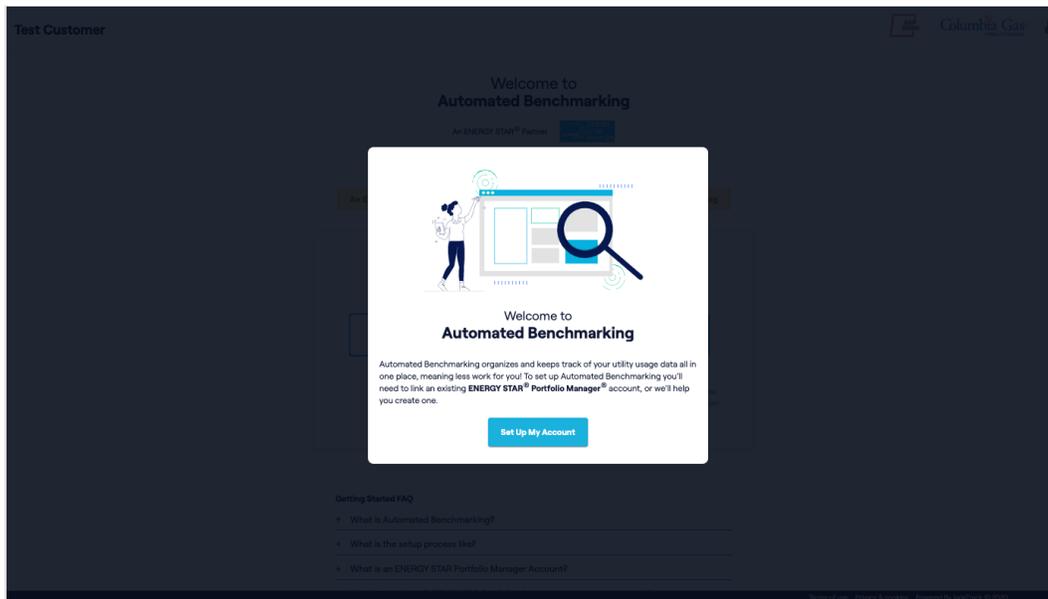


2. Connect with ENERGY STAR Portfolio Manager

Once you've established an account, you'll be taken through a set-up wizard to connect to a Portfolio Manager account. The options below describe two paths:

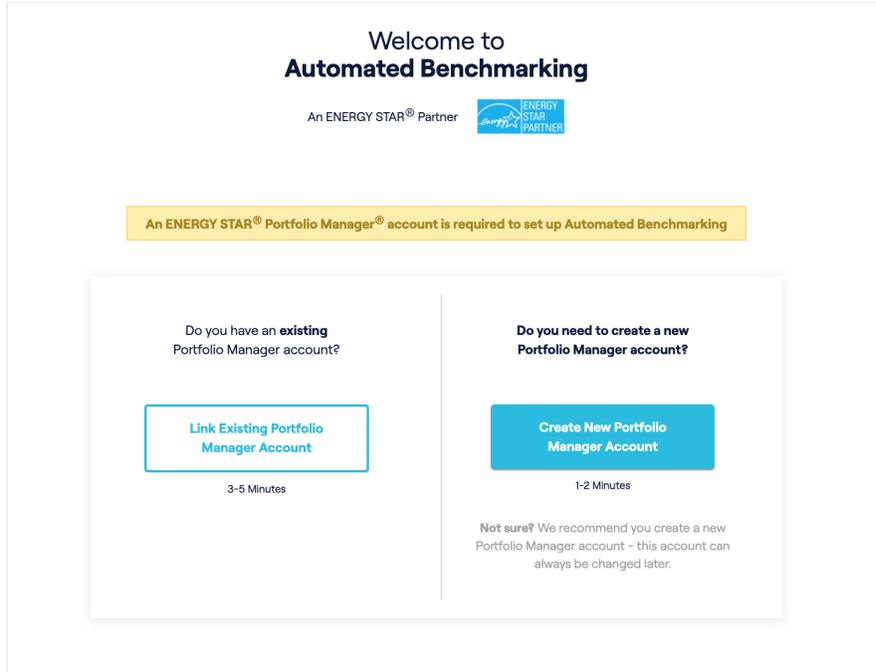
- A. Link an existing Portfolio Manager account
- B. Create a new Portfolio Manager account

To get started, click the "Set Up My Account" button.

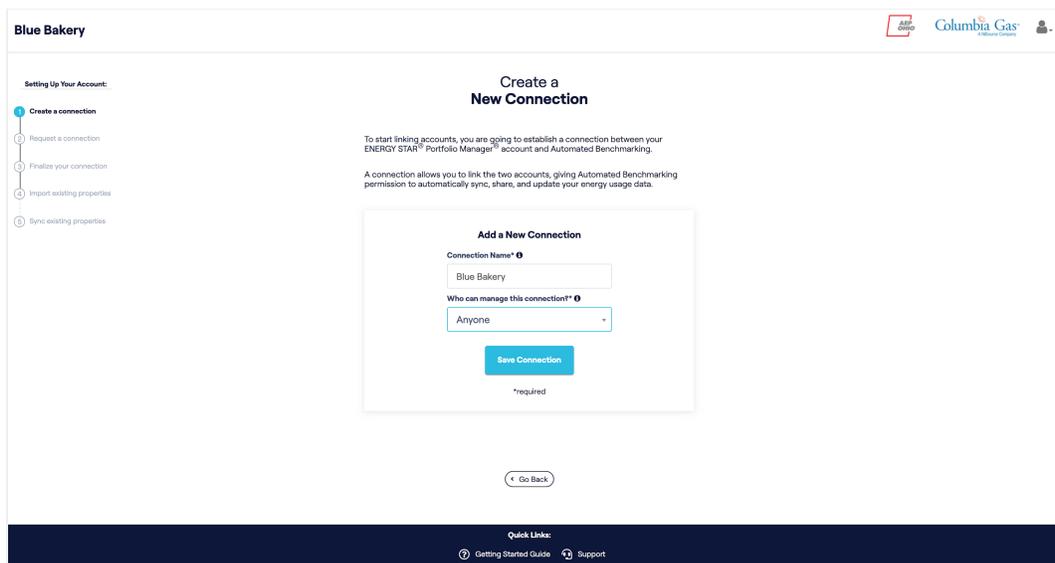


A. Link to an Existing Portfolio Manager Account

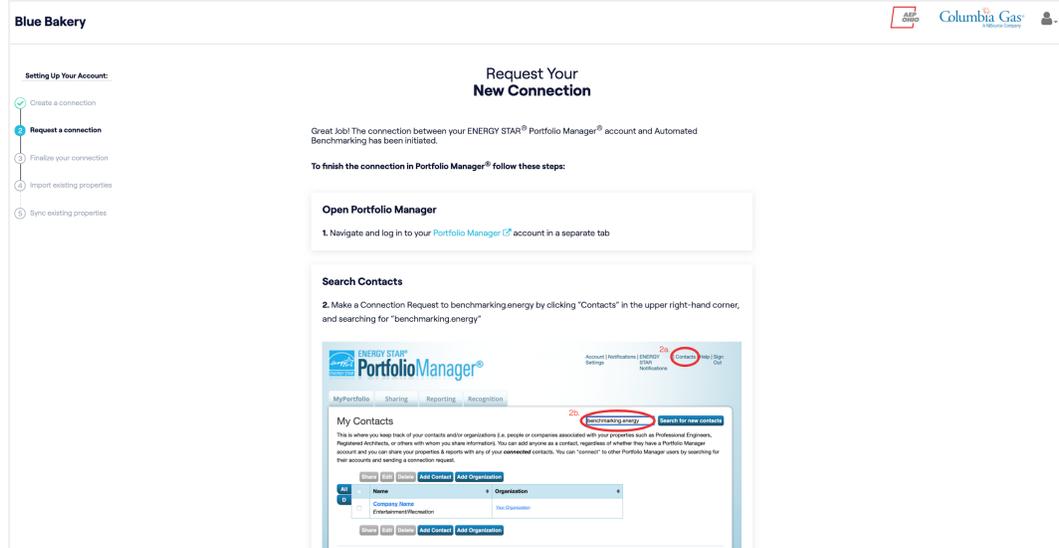
1. If you have an existing ENERGY STAR Portfolio Manager account, click on the white “Link Existing Portfolio Manager Account” button.



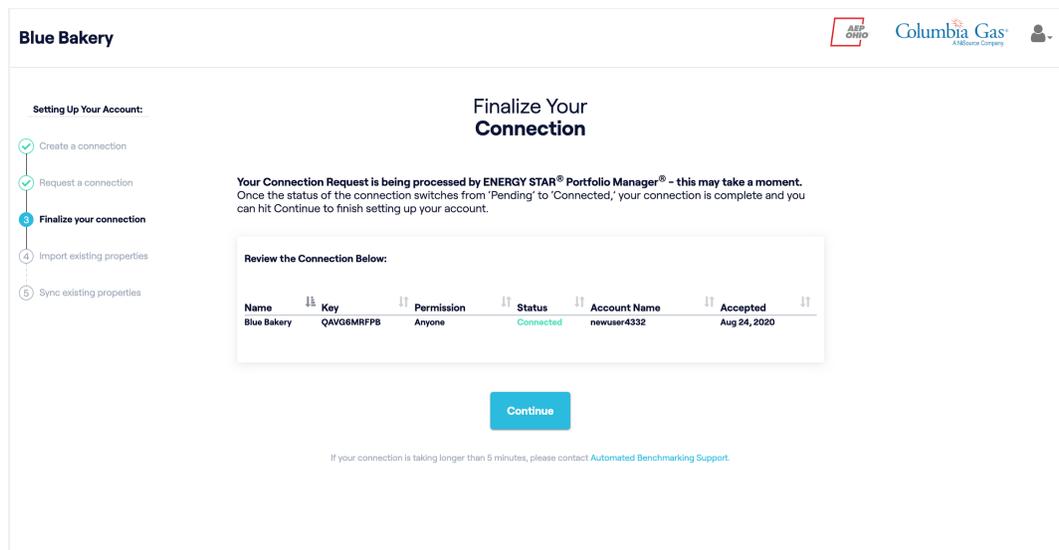
2. To start linking accounts, you need to establish a connection between your ENERGY STAR Portfolio Manager account and Automated Benchmarking. The Connection Name and Management settings are pre-populated, but you can adjust them if needed before clicking the blue “Save Connection” button.



- Open a new tab and log into your Portfolio Manager account. Follow the instructions listed in the setup wizard to accept the connection with Automated Benchmarking. Once complete, return to the Automated Benchmarking tab but keep the Portfolio Manager tab open as you may return to it in step 6.

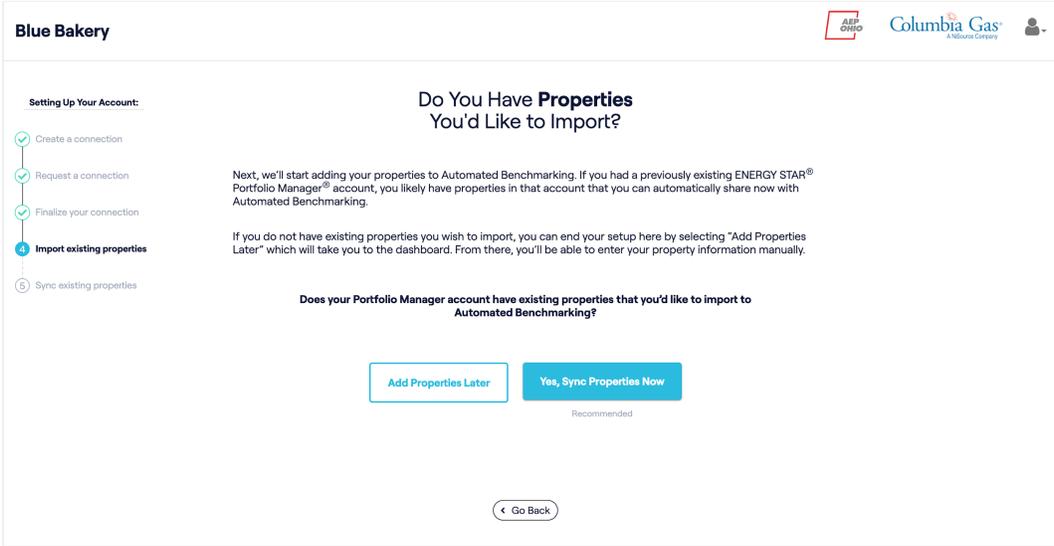


- Return to the Automated Benchmarking tab. Wait for the status of the Portfolio Manager connection to switch from 'Pending' to 'Connected.' Once complete, click the blue "Continue" button. If the connection takes longer than 5 minutes to complete, please contact support@benchmarking.energy.

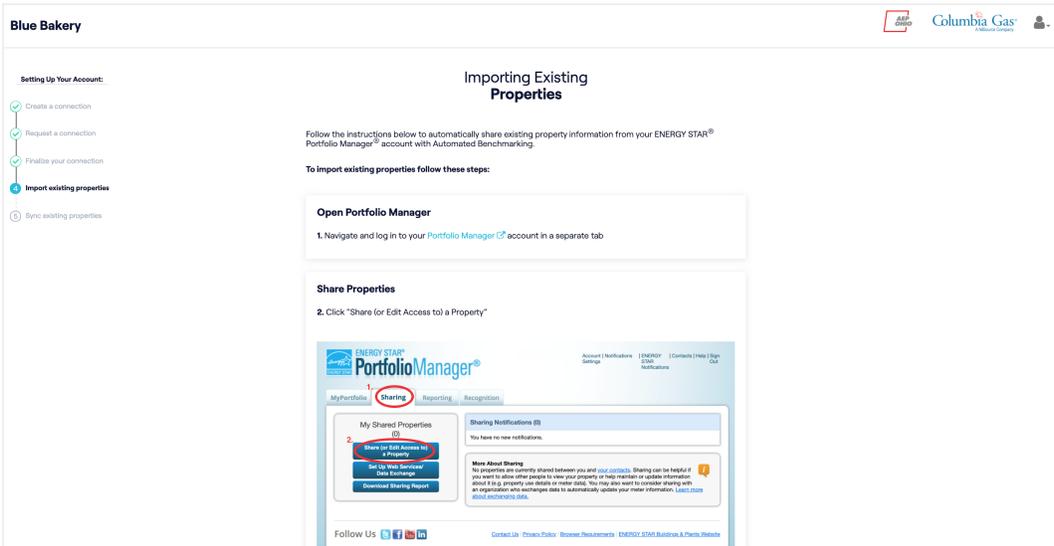


- If you had a previously existing Portfolio Manager account, you likely have properties in that account that you can automatically share with Automated

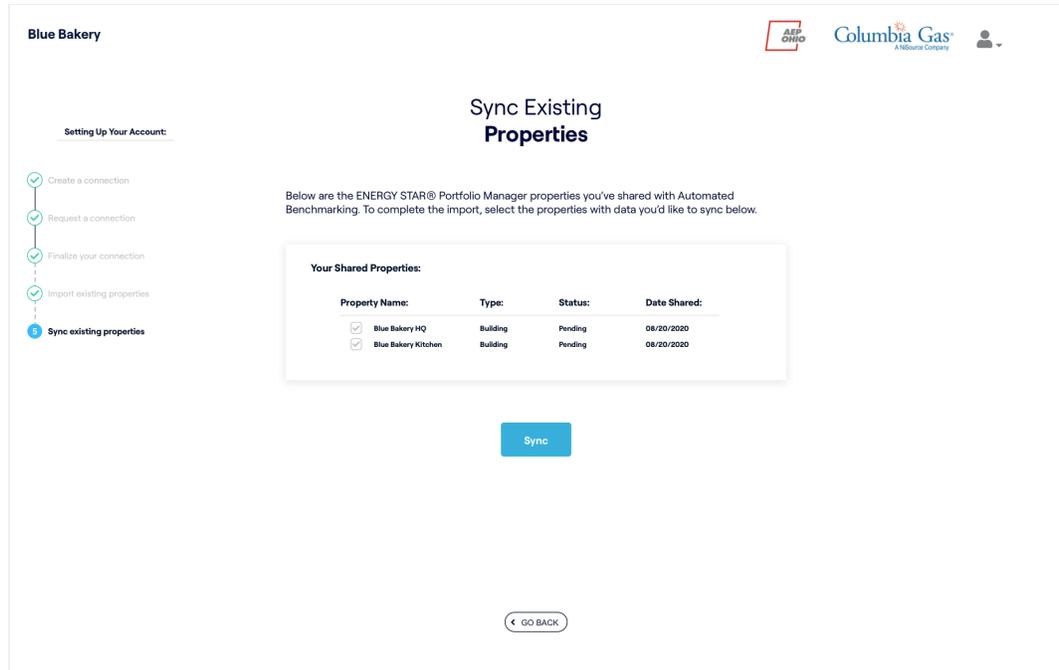
Benchmarking. If so, click the blue, “Yes, Sync Properties Now” button. If you do not have existing properties you wish to import, you can end your setup here by selecting “Add Properties Later,” which will take you to the dashboard. From there, you’ll be able to enter your property information manually.



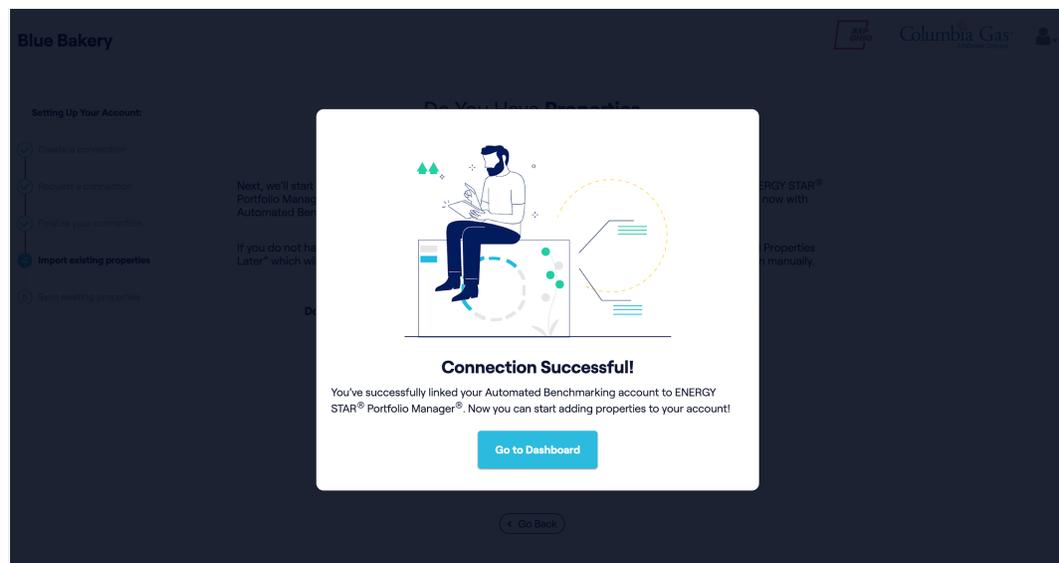
- Return to the tab with your Portfolio Manager account. Follow the instructions listed in the setup wizard to share your properties with Automated Benchmarking. Once complete, close the Portfolio Manager tab and return to the Automated Benchmarking tab.



- A list of properties shared from Portfolio Manager will appear. Select the ones with data that you would like to sync with Automated Benchmarking and click the blue “Sync” button.



- You have successfully linked to your Portfolio Manager account and synced your existing properties with Automated Benchmarking. Click “Go to Dashboard” to view your dashboard and begin linking your properties to your utility accounts.



B. Create a New Portfolio Manager Account

1. If you do not have an existing ENERGY STAR Portfolio Manager account, click on the blue “Create New Portfolio Manager Account” button.

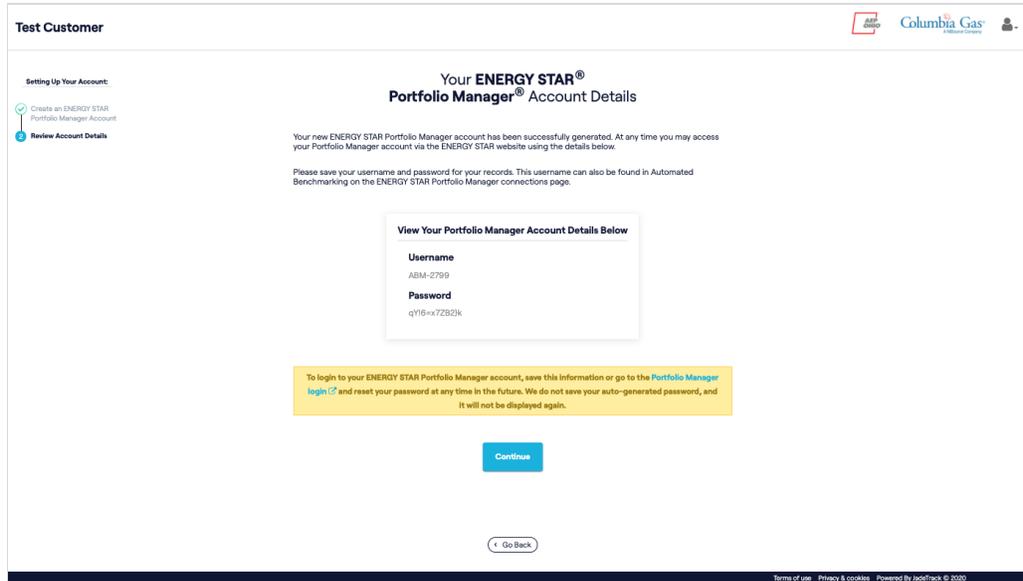
The screenshot shows the 'Automated Benchmarking' welcome page for a 'Test Customer'. At the top right, there are logos for 'JadeTrack' and 'Columbia Gas of Ohio'. The main heading is 'Welcome to Automated Benchmarking' with a sub-heading 'An ENERGY STAR® Partner' and the ENERGY STAR logo. A yellow banner states: 'An ENERGY STAR® Portfolio Manager® account is required to set up Automated Benchmarking'. Below this, there are two columns of options. The left column asks 'Do you have an existing Portfolio Manager account?' and features a blue button 'Link Existing Portfolio Manager Account' with a '3-5 Minutes' timer. The right column asks 'Do you need to create a new Portfolio Manager account?' and features a blue button 'Create New Portfolio Manager Account' with a '1-2 Minutes' timer. Below the buttons, a note says: 'Not sure? We recommend you create a new Portfolio Manager account - this account can always be changed later.' At the bottom, there is a 'Getting Started FAQ' section with three expandable items: 'What is Automated Benchmarking?', 'What is the setup process like?', and 'What is an ENERGY STAR Portfolio Manager Account?'. The footer contains 'Terms of Use', 'Privacy & Cookies', and 'Powered by JadeTrack © 2020'.

2. Your company name and email address are pre-populated. Simply add your business address and click the “Create Account” button.

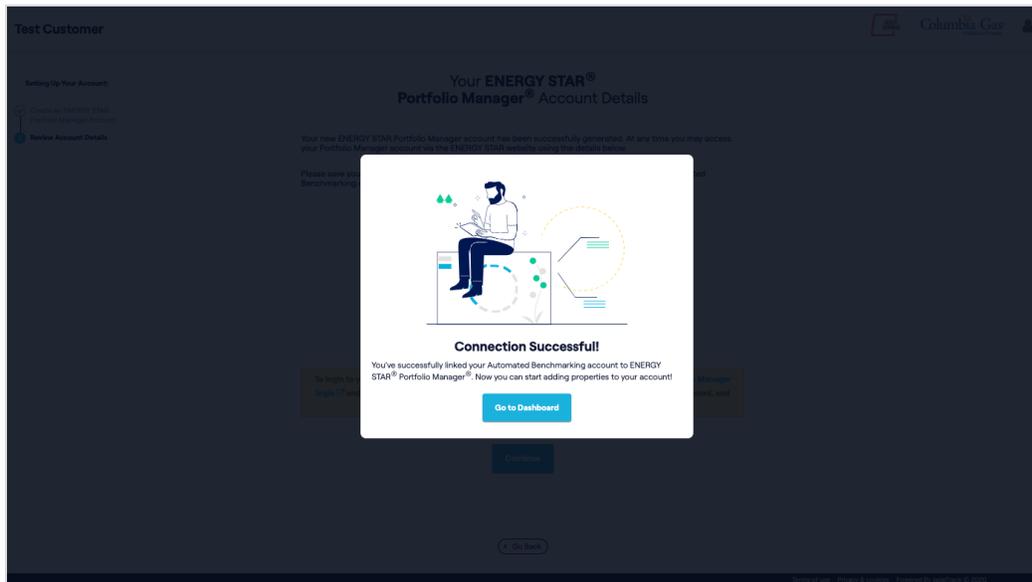
The screenshot shows the 'Create an ENERGY STAR Portfolio Manager Account' form. At the top right, there are logos for 'JadeTrack' and 'Columbia Gas of Ohio'. The main heading is 'Create an ENERGY STAR® Portfolio Manager® Account'. Below the heading, there is a progress indicator with two steps: '1 Create an ENERGY STAR Portfolio Manager Account' (active) and '2 Review Account Details'. A note states: 'Automated Benchmarking can create a Portfolio Manager® account for you automatically. To create a new Portfolio Manager account, please enter your details below. You will notice some fields have been pre-populated using your account information.' Below this, there is a prompt: 'Enter the details below to automatically generate an ENERGY STAR Portfolio Manager account'. The form fields are: 'Company Name*' (pre-filled with 'Test Customer'), 'Email*' (pre-filled with 'lmorgan@jadetrack.com'), 'Business Address*' (with fields for 'Street Address Line 1', 'Street Address Line 2', 'City', 'OHIO' (state dropdown), and 'Zip'). A '*required' note is at the bottom left of the form. A blue 'Create Account' button is at the bottom right. The footer contains 'Terms of Use', 'Privacy & Cookies', and 'Powered by JadeTrack © 2020'.

- Automated Benchmarking will create a Portfolio Manager account for you. Please record the Username and Password. Click “Continue” once you’ve saved this information.

NOTE: You will be able to view your Username from Automated Benchmarking, but your auto-generated password will not be recorded. To reset it at any time in the future, simply visit the [login page for Portfolio Manager](#) and follow the prompts for “I forgot my password.”



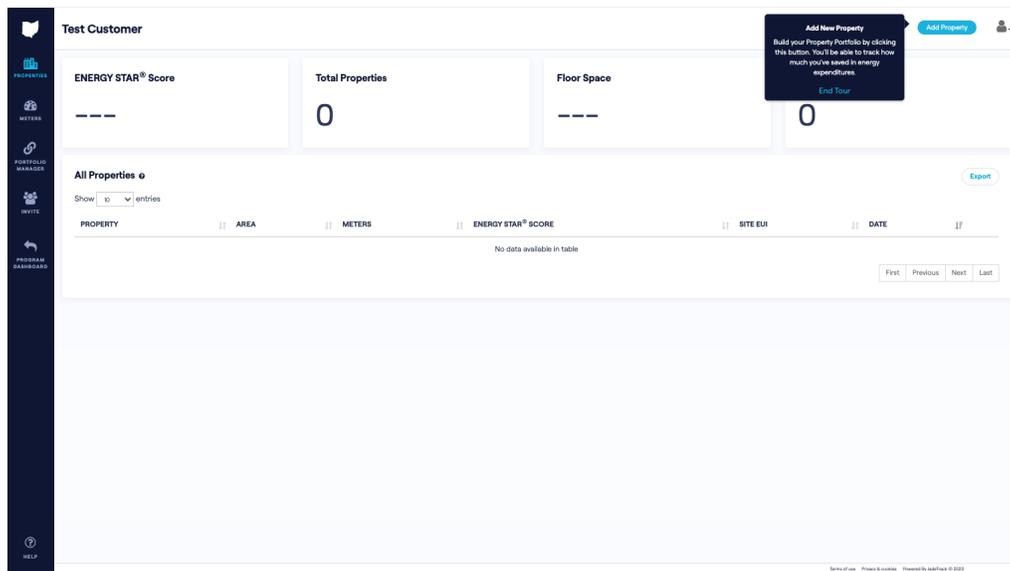
- You have successfully created a Portfolio Manager account. Click “Go to Dashboard” to view your dashboard and begin adding building details.



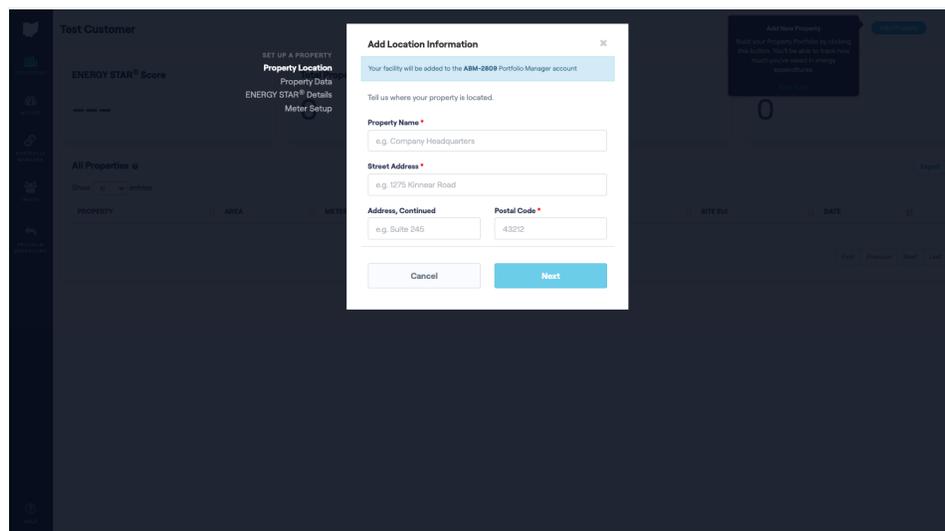
3. Add a Property

Once you have established an Automated Benchmarking account and connected with a Portfolio Manager account, you can begin adding the details of your facility.

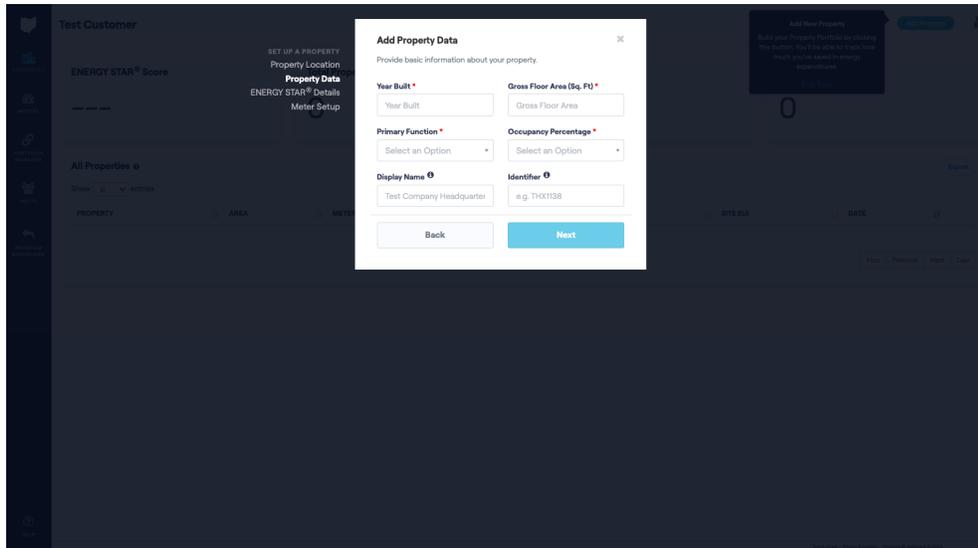
1. From your main dashboard, click the blue 'Add Property' button in the top right corner to begin adding your buildings.



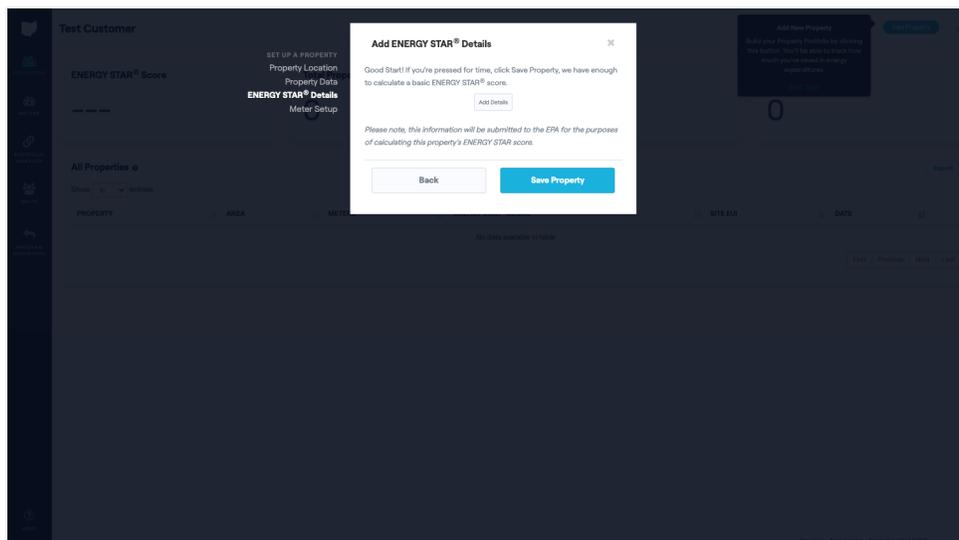
2. Begin by adding basic information about your property, including the name, street address and zip code. Click the "Next" button to save the information and move to the next step.



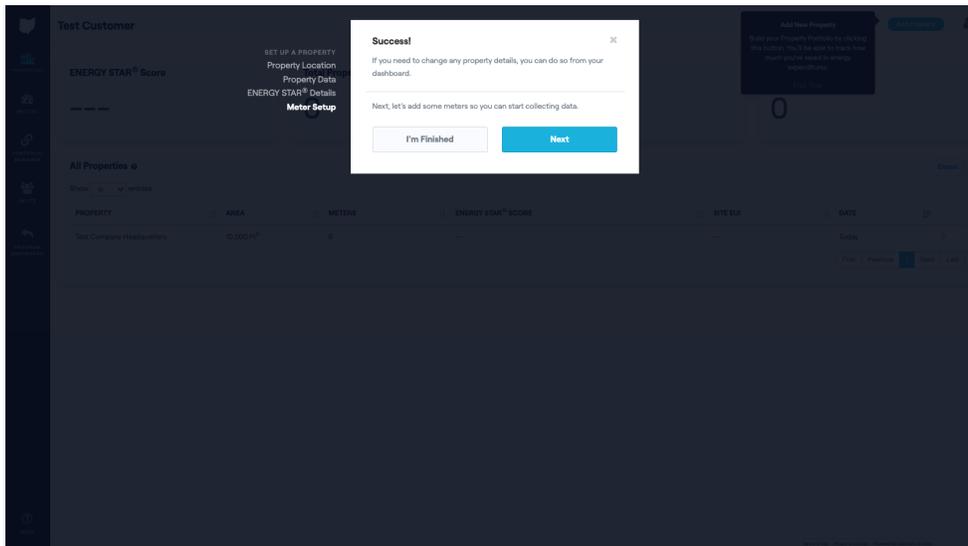
3. Add property data, including the year built and gross floor area (square footage). Select the building's Primary Function from the dropdown menu. The "Display" field is the name of the building you are describing, which will be displayed throughout the tool. The "Identifier" field is optional and can be used to reference a facility identifier or code you may use internally at your organization. Click the "Next" button to save the information and move to the next step.



4. Click "Add Details" to enter additional information about your property, such as the number of workers, operating hours, etc. These details are specific to the Primary Function selected in the previous step. Once complete, click the "Save Facility" button to save the information and move to the next step.



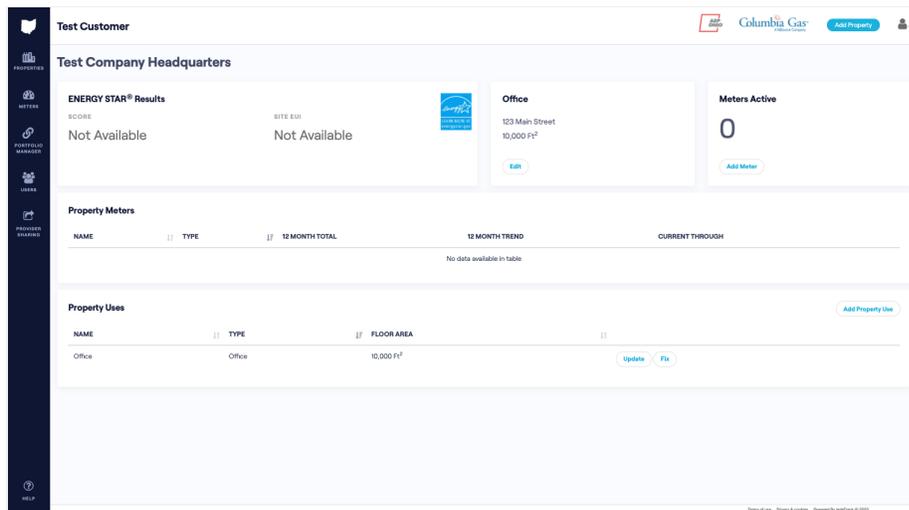
5. Click the “Next” button to add a meter to this property.



4. Link Meters to Your Property

Now that you’ve added property details to Automated Benchmarking, you can link meters from the Columbus Department of Public Utilities so usage data will be updated automatically.

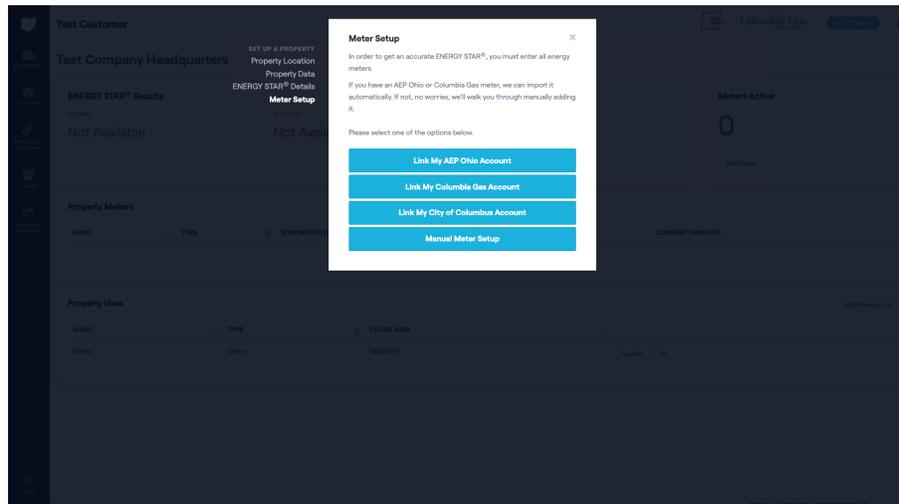
- A. From the main dashboard, click on property associated with the meter you want to link. From the property page, click the “Add Meter” button under the “Meters Active” section (You may also reach this page as the last step of setting up a new facility, as described above).



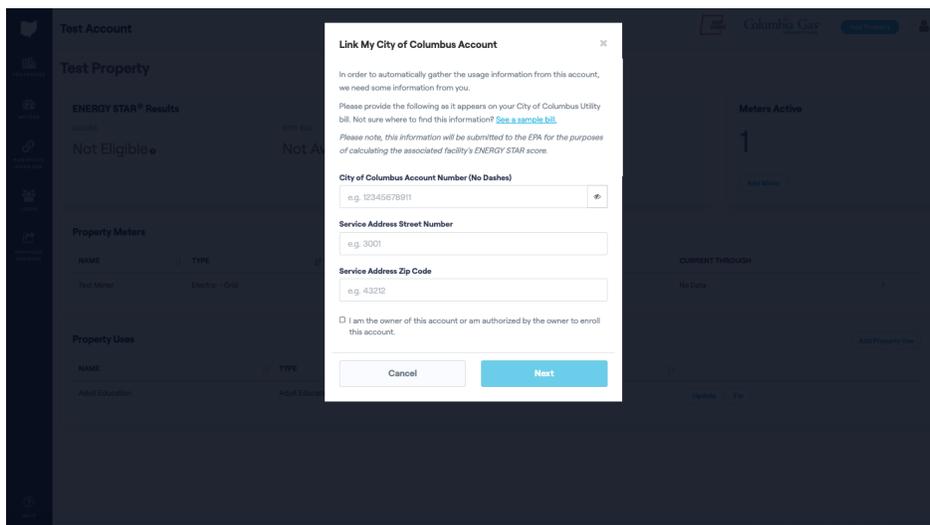
B. Adding a Columbus Department of Public Utilities Meter

Follow these instructions to add a Columbus Department of Public Utilities electric or water meter to Automated Benchmarking. You will need two recent bills.

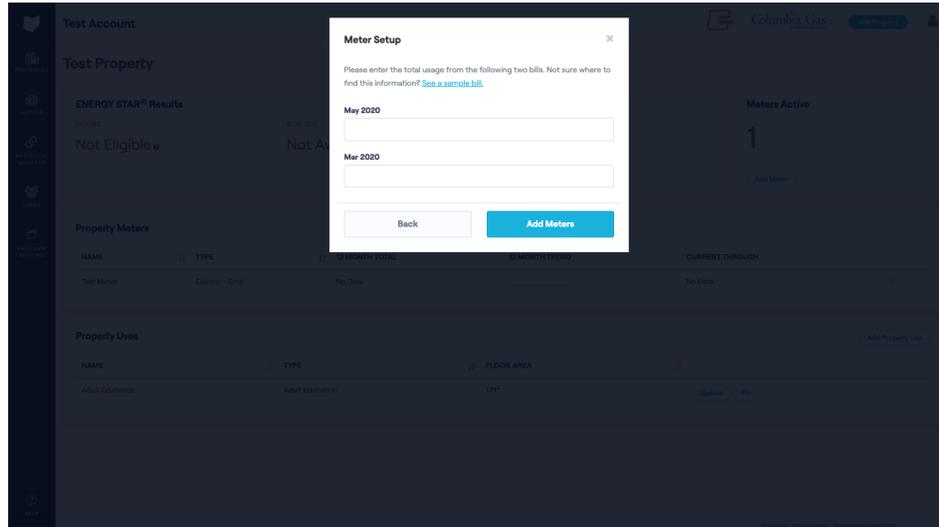
1. Click on the “Link My City of Columbus Account” button.



2. Enter your Columbus Department of Public Utilities Account number without any dashes or spaces, the Service Address Street Number as it appears on your bill, and the Service Address Zip Code. If you are not sure where to find this information on your bill, click the blue “See a sample bill” text to see an example. Check the box to confirm that you are the owner of the account or authorized by the owner to enroll the account. Click the “Next” button to save the information and move to the next step.



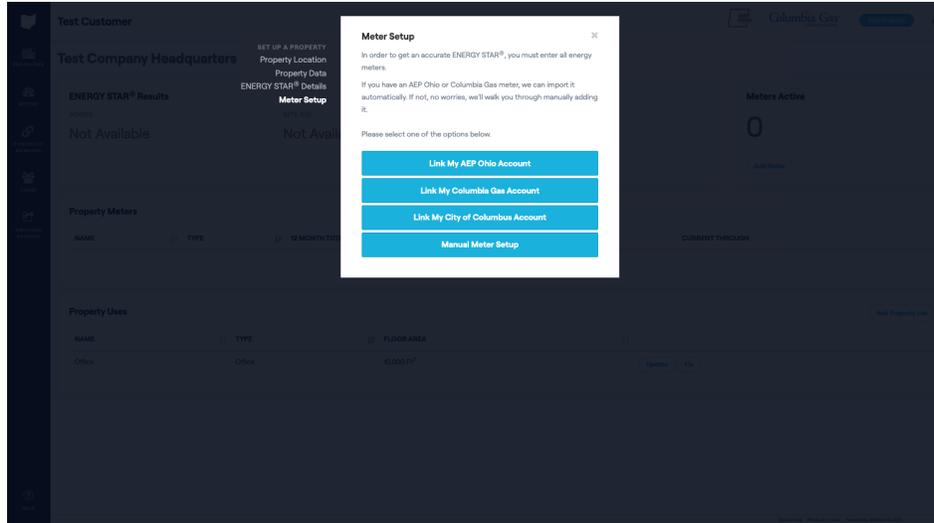
3. Enter the usage from the two months listed, which are three months apart. If you are not sure where to find this information on your bill, click the blue “See a sample bill” text to see an example. Click the “Add Meter” button to save the information and connect with your Columbus Department of Public Utilities meter data.



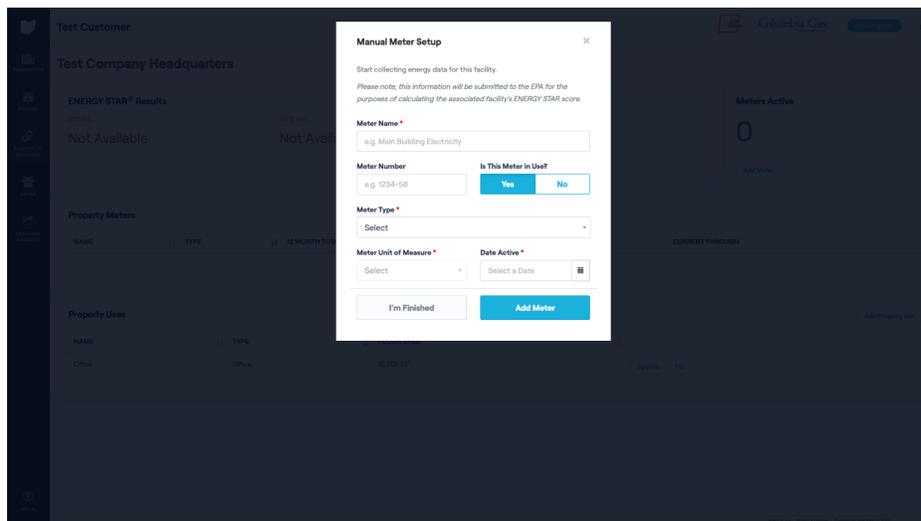
C. Adding a Meter Manually

Follow these instructions to add a utility account that is not tracked through a participating utility provider described above. You will need to manually enter usage information for these accounts so you will need enough bills to enter the historic information you would like to capture.

1. Click on the “Manual Meter Setup” button.



2. Enter your Meter Name, Meter Number, Type, Unit of Measurement and Date Active date. Click the “Add Meter” button to save the information and complete the meter setup.



5. Add Meter Data to Automated Benchmarking Manually

Follow these instructions if you need to add energy data to Automated Benchmarking (from a utility source outside of the participating utilities).

1. Once you have added a meter manually following the steps described above, navigate to that meter page from the “Meters” button on the left side of the screen, or from the “Property Meters” list on the main property page. Click on the name of the meter you wish to update with historic data.
2. Click on the “Add Meter Usage” button.
3. Select the reporting period for the usage. Energy data provided by the Columbus Department of Public Utilities corresponds to your actual bills, and therefore the same meter read and bill dates. When manually entering meter data, you have the option for a “quick entry” that uses simple monthly inputs - “By Month” - (Jan, Feb, Mar etc..) and a true date range entry - “By Custom Range.” Using the Custom Date Range entry is preferred, and gives you the ability to enter actual billing dates.
4. For “By Month” entry, simply select the month from the menu and add the usage in the relevant unit of measurement.
5. For “By Custom Range” entry, select the start and end date of the billing period, as well as the month of the billing cycle for a reference (for example, a billing cycle may run January 12 through February 11 - you could refer to this as a January or a February bill. Whichever you select is fine as long as you use the same naming strategy with each bill). Add the usage in the relevant unit of measurement. Click the “Add Another Range” button to add additional months of data, or the “Save Usage” button to save the information and complete the meter data entry.

6. Invite Solution Providers

If you have a third-party vendor - a “Solution Provider” - who supports your energy management efforts, you can use Automated Benchmarking to easily share your usage and benchmarking data with them.

To do so, you must still establish an Automated Benchmarking account and link to your Portfolio Manager account (completing the “Establishing an Account on Automated Benchmarking” and “Connecting with ENERGY STAR Portfolio Manager” steps above), at a minimum. After these steps, you may invite your Solution Provider to join your account, giving them access to complete the remainder of the process on your behalf, if needed, and add additional data.

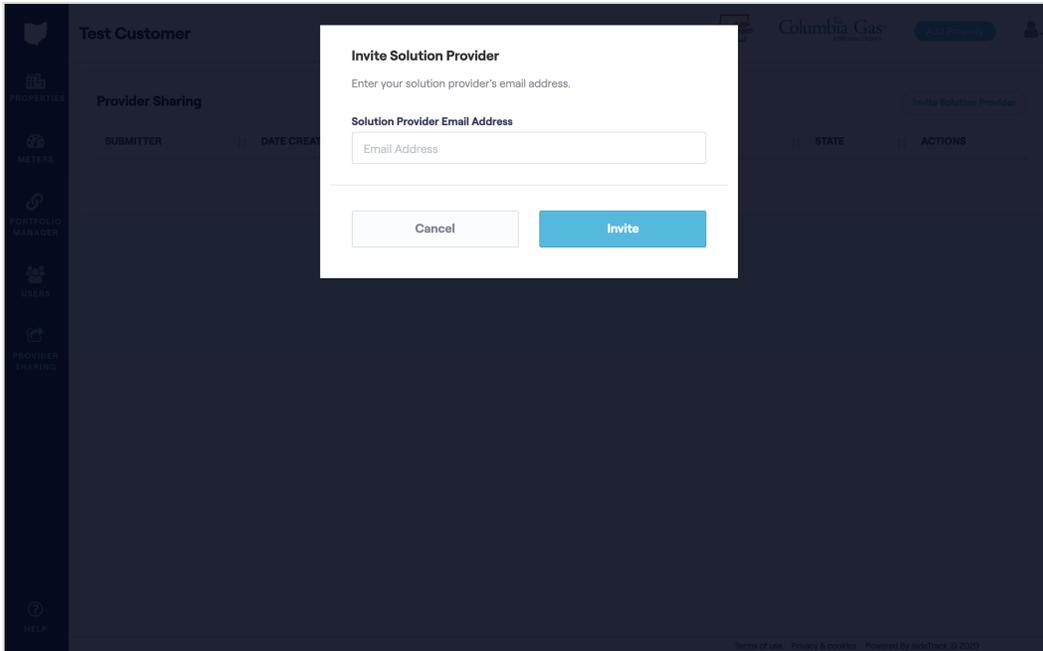
1. Ask your Solution Provider to sign up for a Solution Provider account on Automated Benchmarking. Instructions can be found in the Solution Provider section of this document.
2. Click on the “Provider Sharing” button on the left side of the screen.

The screenshot shows the 'Test Customer' dashboard. At the top right, there are logos for 'ASP OHIO' and 'Columbia Gas' with an 'Add Property' button. The dashboard features four summary cards: 'ENERGY STAR® Score' (100 AVG.), 'Total Properties' (1), 'Floor Space' (48k ft²), and 'Meters Active' (1). Below these is a section titled 'All Properties' with a table listing one property: 'Test Building' with an area of 48,000 Ft², 1 meter, and an Energy Star score of 100. The table has columns for PROPERTY, AREA, METERS, ENERGY STAR® SCORE, SITE EUI, and DATE. A pagination bar at the bottom shows '1' of 1 entries.

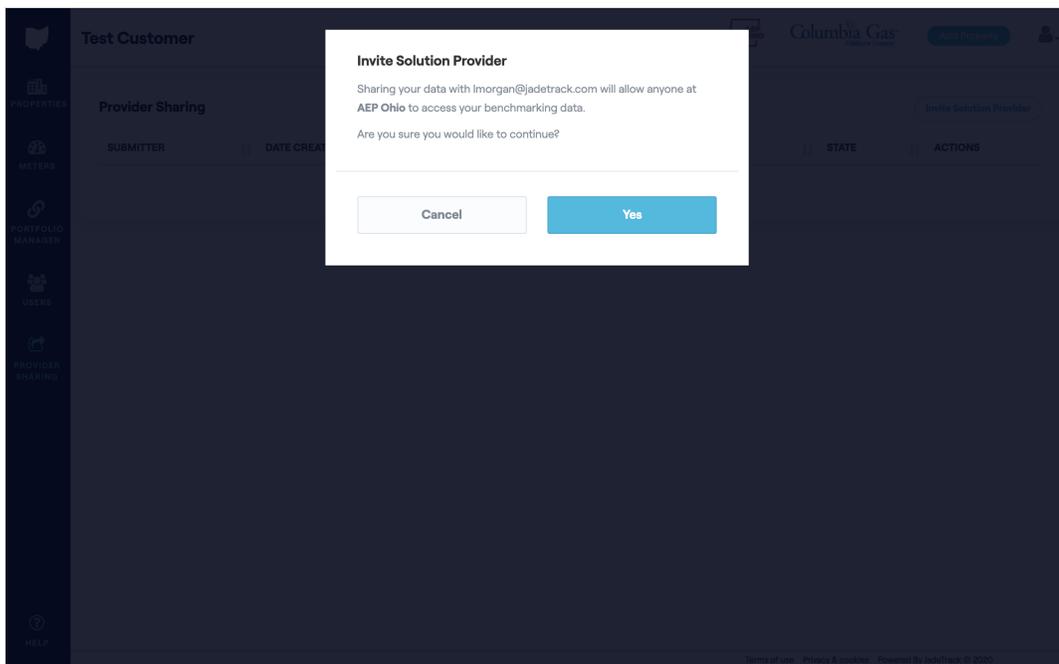
3. Click on the “Invite Solution Provider” button on the top right corner.

The screenshot shows the 'Provider Sharing' page. At the top right, there is an 'Add Property' button and a user profile icon. The main content area is titled 'Provider Sharing' and contains a table with columns: SUBMITTER, DATE CREATED, SOLUTION PROVIDER, EXPIRES, STATE, and ACTIONS. The table is currently empty, displaying the message 'No matching records found'. A blue button labeled 'Invite Solution Provider' is located in the top right corner of the table area.

4. Enter the email address of the Solution Provider enrolled in Automated Benchmarking and click the blue “invite” button.



5. Click the blue “yes” button to agree to sharing your benchmarking information with the Solution Provider.



6. The status will be listed as pending. Your Solution Provider will receive an email to accept your invitation. This status will switch to Accepted once your Solution Provider has completed their process.

Automated Benchmarking for Solution Providers

Automated Benchmarking was intended to be a self-service tool for commercial and industrial business customers. However, many customers have third-party vendors - "Solution Providers" - who support their energy management efforts and may want to utilize Automated Benchmarking on their customers' behalf.

To do so, the account owner must still establish an Automated Benchmarking account and link to their Portfolio Manager account (completing the "Establishing an Account on Automated Benchmarking" and "Connecting with ENERGY STAR Portfolio Manager" steps above), at a minimum. After these steps, the account owner may invite their Solution Provider to their account, giving the Solution Provider access to complete the process and add additional data.

If you are a Solution Provider, please follow the steps below to establish an account and connect with your customers.

1. Establish a Solution Provider Account

- A. Navigate to <https://www.benchmarking.energy/>. Click the button on the top right to Sign Up and select the "I am an Automated Benchmarking Solution Provider" option.
- B. Complete the enrollment form. Be sure to check the "I agree to the Terms of Use and Privacy Policy." You can review the Terms of Use and Privacy Policy by clicking directly on the blue text. Once complete click the "Create a New Account" button. You should receive a notification saying, "Your new account was successfully created. You will receive an Account Activation email shortly."
- C. Check your email account for an email from support@benchmarking.energy with the subject, "Automated Benchmarking - Account Activation." Click on the "Activate Account" button. Be sure to check your spam or junk folder if you cannot find the email. This link is only valid for 24 hours. If you have passed the activation window, click on the "Need to reset your password?" link on the sign-in page and follow the prompts.
- D. You will be taken to a screen to create a password. Passwords must contain at least 8 characters, one uppercase character, one lowercase character, one number and one special symbol. Enter your password twice to confirm there aren't any typos and click the "Activate" button.
- E. Your dashboard will be populated with data once your customers have established their accounts and invited you to connect.

