User Guide to the Con Edison Portal for NYC Benchmarking & EPA’s Portfolio Manager

The NYC Benchmarking Law (Local Law 84) requires owners of large buildings to annually measure their energy and water consumption in a process called benchmarking. The law standardizes this process by requiring building owners to enter their annual energy and water use in the U.S. Environmental Protection Agency's (EPA) online tool, ENERGY STAR Portfolio Manager® and use the tool to submit data to the City. This data informs building owners about a building’s energy and water consumption compared to similar buildings, and tracks progress year over year to help in energy efficiency planning.

The Con Edison Portal for NYC Benchmarking is Con Edison’s state of the art solution which handles the request and approval of an owner’s authorized agent, self authorization of building owners and aggregated consumption data requests. And after creating a Portfolio Manager account, connecting with Con Edison and sharing your property, Con Edison will automatically upload the building’s energy consumption to your account via Portfolio Manager Data Exchange which allows you to benchmark your building’s energy performance.

The User Guide will step you through this request process by detailing the setup of accounts on the Con Edison Portal and Portfolio Manager as well as detailing the interdependency between these two online tools. Please follow the instructions carefully.

Additional assistance is available at:

Help Center for Con Edison Portal for NYC Benchmarking
Mon – Fri  7am – 3:30pm
Phone: 646.899.1923
Email:  citybenchmarking@coned.com

NYC Benchmarking Help Center
Mon - Fri  9am – 5pm
Phone: 212.566.5584
Email:  questions@benchmarkinghelpcenter.org
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1. Quick Start Guide

1.1 **Con Edison Portal for NYC Benchmarking Setup**
(See pages 4-19)

*For Authorized Requestor or Self Requestor accounts:*
1. Set up a Con Edison Portal Account. Be sure to select the appropriate account type: Authorized Requestor or Self Requestor. Be sure to note the Requestor ID. You will need this in Portfolio Manager.
2. Set up authorization requests. Authorizations are by Block and Lot. For each Service Address, enter the Property ID number from Portfolio Manager.
3. Submit for Customer Approval. Authorizations are automatically approved for Self Requestor accounts.

*For Customer accounts:*
1. Set up a Con Edison Portal Account. Be sure to select the appropriate account type: Customer.
2. Approve or Reject any pending authorization requests.

1.2 **Connect with Con Ed in Portfolio Manager**
(See pages 20-34)

1. This guide assumes that you have a Portfolio Manager account with created properties. If this is not the case, please refer to the Portfolio Manager Setup Guide for details.
2. Add Con Edison’s web service account as a contact. Agree to Terms and Conditions. Enter Requestor ID from the Con Edison Portal. Send Connection Request.
3. After Connection is accepted, select all Properties to be shared with Con Ed. Select Full Access. Share Property(ies). Property ID’s must be pre-populated in the Con Edison Portal or the Property Share request will fail.

1.3 **Request Aggregated Data**
(See pages 35-36)

*For Authorized Requestor or Self Requestor accounts only:*
1. Login to the Con Edison Portal.
2. Click on Request. Select any or all Properties for aggregation. Only Approved authorizations will appear. The two previous calendar years will be available for aggregation. Click Submit. Data will be automatically posted to Portfolio Manager using the provided Property ID.
2. Con Edison Portal for NYC Benchmarking Setup
https://apps.coned.com/NYCBENCHMARK/

Welcome to the Con Edison Portal for NYC Benchmarking. The Portal utilizes Multi-Factor Authentication in order to ensure the confidentiality of your login credentials and data requests. The authentication process consists of registration, verification of email address and device as well as profile creation and is outlined below.

2.1 Registration
Use the link above and click on the Register link on the home page.

You will be asked for your name and email address. Click on Submit.
2.2 Verification of email address

Now check your email in order to verify your email address. Click on the Verify Email Address link. This verification link is active for 7 days only.
2.3 Create Your Profile

You will be requested to create and confirm a password. The password requirements are:

- 8 – 30 characters
- At least 1 uppercase letter
- Does not contain part of the username as the password
- At least 1 number (0-9)

You will be required to perform a second verification. There are multiple authentication options and whichever one you choose will be used indefinitely, cannot be changed and will be used to provide a verification code. The Text Verification option was used in the example below but the same process is used regardless of the authentication option.
Click **Get Code**. A verification code will be sent to your mobile device via text messaging.

Enter the verification code and click **Submit**.
SUCCESS! Your registration is complete, now login with your credentials to verify your device/computer and to setup your profile type.

2.4 Verify Device/Computer

After logging into your account, you will be required to authorize your computer or device with the system. Enter the verification code sent to your mobile device via text messaging and click Submit.
If the following screen appears, use this link to login:  [https://apps.coned.com/NYCBENCHMARK/](https://apps.coned.com/NYCBENCHMARK/)

Once logged in, you will now be able to choose a Profile Type.
2.5 Choose a Profile Type

The multi-factor security and validation process is complete. Now choose your user profile type. It is extremely important that you choose the correct profile type since it will determine the functionality available to you. So please review the following:

- **Authorized Requestor**: Select Authorized Requestor if you are a third party firm requesting the aggregated data for a building owner/manager and not for your own accounts. The Authorization will require approval from the Customer who owns/manages the properties.

- **Customer**: Select Customer if you are authorizing a third party (Authorized Requestor) to retrieve aggregated data on your behalf and post that data to Portfolio Manager. As a Customer you have no ability to request or post data. All you can do is Approve or Reject Authorizations from Authorized Requestors. This account allows the Customer to have total control over who requests the aggregated data on your behalf.

- **Self Requestor**: Select Self Requestor if you are requesting the aggregated data for your own portfolio of buildings (Con Edison accounts). As a Self-Requestor, no Customer approval is required. The Authorizations are automatically self-approved but can be rejected.

You will notice that the system has pre-populated the remaining fields on the screen for you. When your profile selection has been made and you have entered and/or verified all information, click **Save**.
After registering as an Authorized Requestor or Self Requestor, you will be assigned a Requestor ID. This ID is required when connecting to the Con Edison Web Services Account in Portfolio Manager. The Requestor ID can be found by clicking on Edit User in the upper right hand corner of the Navigation bar.

And it is this Requestor ID that will be used as identification when requesting a connection to the Con Edison Web Services Account in Portfolio Manager (this screenshot is for reference, please see Connect with Con Ed in Portfolio Manager for more details).
2.6 Authorized Requestor Accounts

2.6.1 How to Create a New Authorization

As an Authorized Requestor, it is your responsibility to submit authorizations for approval by the customer. Once approval has been received, you may continue with the request process. To begin, select the New Authorization Request link as demonstrated below.

![New Authorization Request](image)

You will need the 15 digit Account Number from your customer’s bill along with the block, lot and customer’s email address (this is the email that your customer is using to set up their Con Edison Portal account). All other data is optional. If you happen to know the Property ID that is related to this authorization, enter it now. However, you will be entering the Property ID of the primary service address only. If there are multiple service addresses associated with this account, they will be displayed after submission and you will be able to update all Property IDs at that time. Make sure you check the LL84 checkbox and then click Submit.

![Authorizations](image)
2.6.2 How to Update Property IDs
Upon submission of your authorization, the system will display all service addresses associated with the BBL (borough, block and lot) entered. Enter Property IDs for all addresses that are your responsibility. Remember, the Property IDs can be modified whether the authorization is Pending or Approved. This can be done by clicking on the Details link and within the Details popup window, enter the Property IDs into the appropriate service addresses and click Submit. The same Property ID can be added to multiple service addresses if appropriate.

The Property ID can be found in Portfolio Manager on the Property page (see below):
2.6.3 Special Considerations
There are a few rules to follow when entering authorizations. The system will fail duplicate authorizations (same BBL submitted by the same Authorized Requestor) when the system attempts to validate the information. If validation is successful, the authorization’s status will be updated to Pending waiting for the Customer’s approval. While the status is Pending, the Authorized Requestor can delete the authorization but once approved, deletion is no longer an option. If the Customer rejects the authorization, the status is updated to Rejected.
2.7 Customer Accounts

2.7.1 Approving and Rejecting Authorizations
As a Customer, it is your responsibility to control who posts data on your behalf to your properties in Portfolio Manager. At this time, you as a Customer, have no ability to post data for yourself. All you can do is Approve and/or Reject authorizations from Authorized Requestors. Your approval is required. Without it, authorizations will stay in a Pending state and the Authorized Requestors will not be able to request consumption data on your behalf. To begin, select the Authorization link on the navigation bar as demonstrated below.

![Authorization Page](image1.png)

The Authorization page displays all the authorizations that have been assigned to the customer’s email. You can review the Service Address and Requestor’s Name for all authorizations awaiting approval or rejection. Make your selection and then click Submit. The status will be updated and the Authorized Requestor will be able to view the status change upon login.

![Authorization Page](image2.png)
2.7.2 Special Considerations

There are a few rules to follow when approving/rejecting authorizations. Usually a Customer should only approve one authorization for each Borough, Block and Lot (BBL). But there can be a scenario when multiple Authorized Requestors share reporting responsibilities for multiple properties on the same BBL. In that case, a Customer can approve multiple Requestors for the same BBL dividing the reporting for the properties between the multiple Requestors. The responsibility for reporting aggregate consumption data to Portfolio Manager is yours and you should be careful about approving authorizations and controlling data reporting for your properties.
2.8 Self Requestor Accounts
2.8.1 How to Create a New Authorization
As a Self Requestor, it is your responsibility to submit authorizations and request consumption data for your own accounts and properties. Your authorizations are automatically approved upon submission and only require that you update the authorizations with Property IDs before requesting aggregated consumption data. Select the **New Authorization Request** link as demonstrated below.

You will need your 15 digit Account Number from your bill along with the block and lot. Your email has been pre-populated. All other data is optional. If you happen to know the Property ID that is related to this authorization, enter it now. However, you will be entering the Property ID of the primary service address only. If there are multiple service addresses associated with this account, they will be displayed after submission and you will be able to update all Property IDs at that time. Make sure you check the LL84 checkbox and then click **Submit**.
2.8.2 How to Update Property IDs

Upon submission of your authorization, the system will display all service addresses associated with the BBL entered. Enter Property IDs for all addresses. This can be done by clicking on the Details link and within the Details popup window, enter the Property IDs into the appropriate service addresses and click Submit. The same Property ID can be added to multiple service addresses if appropriate.

![Screenshot of Con Edison Portal with details of updating Property IDs](image.png)

The Property ID can be found in Portfolio Manager on the Property page (see below):

![Screenshot of Portfolio Manager displaying Property ID](image.png)
2.8.3 How to Reject Authorizations
As a Self Requestor, you can reject your own authorizations. Once rejected, you can no longer request consumption data for those authorizations.

TIP: The selection of the Reject checkbox requires a two-click process. The first click should be within the gray shaded area in order to activate the checkbox. The checkbox will display with rounded edges. Then click inside the check box and you should see the following:

2.8.4 Special Considerations
There are a few rules to follow when submitting your own authorizations. Primarily, the authorizations are self-approved, so there is no Pending status. Self Requestor can reject and re-create new authorizations as needed.
3. Connect with Con Ed in Portfolio Manager

https://www.energystar.gov/portfoliomanager

Now you can connect your authorizations in the Con Edison Portal to your account and properties in Portfolio Manager. These connections must be made in order for Con Edison to send your aggregated consumption data to Portfolio Manager. You will need your Requestor ID from the Con Edison Portal and your Property IDs from Portfolio Manager.

3.1 Connecting Accounts

First, you must connect with the Con Edison Web Services Account by adding it as a contact in Portfolio Manager.

Search on “Consolidated Edison” and click on Search for new contacts.
You want to share your data with “Con Edison – NYC Benchmarking with Consolidated Edison” Web Services Account by clicking on Connect.
Enter your Requestor ID from the Con Edison Portal and accept the Terms and Conditions with regard to sharing your data with Con Edison of New York by clicking **Send Connection Request**.
You should receive notification that a connection request has been sent to Con Edison. You can check in the following places like here...

![Con Edison Portal for NYC Benchmarking & Portfolio Manager User Guide | 10/22/2018](image-url)
Or here...

Or here...
Once Con Edison has accepted your request, as shown below, you can move on to connecting your properties between the Con Edison Portal and Portfolio Manager.
3.2 Connecting Properties

Before you give permission to share your property with Con Edison, you must add your Property IDs into the Con Edison Portal to all appropriate authorizations/service addresses. This can be done by clicking on the Details link and within the Details popup window, enter the Property IDs into the appropriate service address(es) and click Submit. The same Property ID can be added to multiple service addresses within the same authorization if appropriate.

Your property share will fail within Portfolio Manager if you attempt to share your property without entering the Property IDs into the Con Edison Portal. If it fails, you will have to add the Property IDs as outlined above and attempt to re-share the property.
Go to Portfolio Manager to share your property with Con Edison. You can use the Sharing Tab or you can access Sharing on the Property page of the building that you are sharing with Con Edison. So you can share from here...
Or here...
Be sure to grant full access to your property to Con Edison so that Con Edison can post its aggregated consumption data to your account. Be mindful that Con Edison requires full access to your Property Information only. You can grant access to other information as you see fit but it is optional for you and not required by Con Edison.

Select your property (the one who’s ID was entered into the Con Edison Portal), select the Con Edison Web Services Account and grant permissions (Personalized Sharing & Exchange Data) to Con Edison and click **Continue**.
Select the **Exchange Data** radio button and click **Share Property(ies)**.
The following popup appears and you must allow Full Access for the Property Information or the process will fail. The popup requires that all meters have an access method defined. “None” is acceptable for all meters EXCEPT Property Information. Again, you can grant access to other information as you see fit but it is optional for you and not required by Con Edison.

<table>
<thead>
<tr>
<th>Item</th>
<th>None</th>
<th>Read Only Access</th>
<th>Full Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Property Information</td>
<td>☐</td>
<td>☐</td>
<td>☑</td>
</tr>
<tr>
<td>All Meter Information</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Energy Meters</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Water Meters</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Potable Indoor Meter</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Goals, Improvements, &amp; Checklists</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Recognition</td>
<td>☐</td>
<td></td>
<td>☐</td>
</tr>
</tbody>
</table>

Share forwarding is not required either. Click Apply Selections & Authorize Exchange.

Additional Options:

<table>
<thead>
<tr>
<th>Item</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share Forward</td>
<td>☐</td>
<td>☑</td>
</tr>
</tbody>
</table>

Allow Con Edison TEST ONLY to share this property with others and give them any permissions that he/she has, including the right to share with more people.

Apply Selections & Authorize Exchange
Click **Share Property(ies)** again. The Exchange Data radio button should have been activated by the popup menu.
Upon completion, you will receive a notification of your share request.
Once your Property Share Request has been accepted by the Con Edison Web Services Account, you can now send your aggregated consumption requests from the Con Edison Portal to Portfolio Manager.
4. Request Aggregated Data

https://apps.coned.com/NYCBENCHMARK/

Click the **Requests** link on the navigation bar, all approved authorizations will be displayed. Select any or all Properties for aggregation. The two previous calendar years will be available. Data will be automatically posted to Portfolio Manager using the provided Property ID.

**TIP:** The selection of the calendar year requires a two-click process. The first click should be within the gray shaded area in order to activate the checkbox. The checkbox will display with rounded edges. Now click inside the check box and you should see the following:

Click **Submit** to request consumption data for those selections that you have made.
Once submitted, you will be able to expand the authorization to see the status of your request. It will detail the year of data that you requested, the status, the creation and completion dates. The Status can be New, Pending or Completed.

**NEW:** A newly submitted request. It is awaiting aggregation.

**PENDING:** The system has started the aggregation process.

**COMPLETED:** The process has completed and your aggregated details are contained in the Aggregation Detail Report on this portal and in Portfolio Manager assigned to the property id specified in the authorization.
5. Additional Guides

There are additional guides to assist you in the Benchmarking process.


**Bulk Authorizations Guide** gives details on how to upload multiple authorizations without typing each one in one at a time.

**Portfolio Manager Setup Guide** gives details on how to setup a Portfolio Manager account and create properties.

**Portfolio Manager Meter Maintenance Guide** gives details on how to include the Con Edison aggregated meters in your performance metrics, how to connect these meters to your existing historical meters and considerations for rerunning your data request if necessary.