Portfolio Manager Meter Maintenance

After monthly consumption data has been uploaded to Portfolio Manager by Con Edison, a few tasks may be required within Portfolio Manager to ensure that the data is usable and included within Metrics.

Please note that meter maintenance within Energy Star Portfolio Manager, is not Con Edison's responsibility.

1. Monitor your meters within Energy Star portfolio Manager: If you have moved meter out of metrics, you will need to monitor them to ensure that consumption has not been uploaded to meters that are no longer being utilized for metrics. If Con Edison has uploaded consumption to a meter that is not included within metrics and the meter should be associated with the property, follow the steps to move meters into/out of metrics as needed. **Follow the instructions in Section 1 below.**

2. Ensure that there are no gaps or overlaps within consumption data: After meters are properly included within your metrics, there may be gaps and overlaps between the historical and aggregated meters. **Follow the instructions in Section 2 below.**

1. Including Meters in My Metrics

Within Energy Star Portfolio Manager (ESPM), on the Energy tab, you will find your Con Edison aggregated meters and consumption data. These meters may be located under the "Additional Meters – Not Used in Metrics" Section within the "Energy' Tab.

Meters located under the "Additional Meters – Not Used in Metrics" that are receiving consumption provided by Con Edison and should be part of the property will need to be recategorized to allow these meters to be used to Compute Metrics. Please follow these steps:

Step 1: Recategorize these meters manually by clicking on the "Change Meter Selections" link within the "Additional Meters – Not Used in Metrics" Section.

Step 2: After selecting "Change Meter Selections", select the meters that you want included within your metrics, along with selecting whether those meters account for all the property's energy. Most property managers will check the boxes for all meters and select the option stating that these meters account for the total energy consumption for the building.

Step 3: Click "Apply Selections".

Your meter(s) are now included in your metrics.

2. Handling Historical and Aggregated Meters

The meters generated by the Con Edison Building Energy Usage Portal are aggregated meters that reflect total consumption across multiple accounts, which allows reporting for whole-building consumption data. It is assumed that the customer's existing Portfolio Manager Account may contain existing/historical meters that are not the same as the newly generated aggregate meters. It is imperative to ensure that the transition from the historical meter to Con Edison's aggregate meter is captured cleanly in Portfolio Manager and that there are no instances of meter data gaps or instances of duplicate consumption being created.

To ensure that the transition is handled smoothly, within Energy Star Portfolio Manager, under the "Energy" Tab, find the date the aggregated meter became active. This can be found under "Basic Meter Information". This date will be used to inactivate the existing/historical meter(s).

Step 1: Start by going to the "Energy" tab and clicking on the name of the aggregated meter that you are needing to move to inactive. Click on the caret next to the Basic Meter Information header to display the following.

In this example, the aggregated meter became active on Dec 15, 2014. This will be the inactive date for any existing/historical meter(s) on the account.

Note: deleting consumption data is permissible, but you will want to verify that there is no active aggregated consumption that is being sent to these meters prior to deletion, and that the meters are not set up to receive aggregated consumption for any reason in the future.

Step 2: For the existing/historical meter(s), uncheck the "Still In Use" checkbox and add the active date from the aggregated meter as the inactive date for the historical meter(s). This will establish continuity between historical and aggregated meters.

Step 3: Click "Save Changes".

Step 4: Once this is completed, please review the data for any gaps or double-counting and make appropriate changes as required.