

RPU Connect Benchmarking User Guide

RPU

CONNECT

WELCOME!

This guide is designed to help RPU business customers utilize the automated ENERGY STAR[®] Portfolio Manager[®] (ESPM) data transfer and benchmarking features available through the RPU Connect Portal.

For users new to ESPM, additional resources on registering for an account and creating properties can be found here: <u>https://www.energystar.gov/buildings/benchmark</u>

Please contact our team with any questions or support requests: RPUPrograms@RPU.org



ACCOUNT HOLDERS	NON-ACCOUNT HOLDERS	STEP 2:
STEP 1A:	STEP 1B:	Define Yo
RPU Connect	/ RPU Connect	/ Meter Gr
Portal Access	/ Portal Access	/

EP 2: Tine Your ter Group STEP 3: Create an ESPM Account STEP 4: Connect to ESPM STEP 5: Send Data from RPU Connect to ESPM

STEP 1A: RPU Connect Portal Access Instructions for Account Holders:

- If you are the owner of the building and own all the account data for the building, you can create an account or log into the RPU Connect portal at https://my.rpu.org.
- Proceed to Step 2: Define Your Meter Group (page 5).



STEP 1B: RPU Connect Portal Access

For property managers, building owners, third parties, or account holders who do not have ownership of all residences in a property, the following instructions will guide you through the Whole-Building Benchmarking data request process:

- To get started, follow the instructions and provide all required information on the online "Request for Whole-Building Energy Usage Data" form at: <u>my.rpu.org/WholeBuilding/RequestOwnerPermission</u>
- Define your building request using the **address search** function:
 - » Enter street number/name to display available service location groups.
 - » Click each relevant service address that comprises the building, from the "My Service Addresses" list and confirm unit count details.
 - » Select your relationship to the building (Building Owner, Property Manager, Third-Party, Other).

Helpful Hint: For buildings with multiple accounts or meters, there may be more than one service address linked to a single building. Be sure to check your **RPU bills** to confirm the correct service addresses.

PUBLIC UTILITIE	5							
		Request for	Whole-Bu	ilding Energy	Usage Data			
Instructions: Click on each se definition by clic address options	rvice address to add to the sking on the red trash icon. ' by typing in the 'Search' fie	building definiti View unit details Id. Once form is	on and cont s by clicking complete,	firm the unit/m g on the arrow is click Submit bu	eter count. Remove a con to right of select tton at bottom of for	i service addres ed service addre m to complete r	s from the building ess. Limit service equest.	
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Building Name								
Please indicate	your relationship to the bui	lding: •						
Building Owne	er Property Manager	Third-Party	Other					
Requestor Atte First Name •	estation	Last Nam	e •					
Employer/Orga	anization •	Title •						
Address •		Email •	Email +		Phone *	Phone +		
rt T	est	Search	Bui	Iding Name *			• Required	
			Ple	ase indicate your	relationship to the bui	lding: •		
	Test Ave		В	uilding Owner	Property Manager	Third-Party	Other	
			Fi	irst Name *			Last Name *	
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			B	y signing belov	ı, I attest that the ab	ove information	n is true and accurat	

ACCOUNT HOLDERS STEP 1A: RPU Connect Portal Access STEP 2: Define Your Meter Group STEP 5: Send Data from RPU Connect to ESPM

STEP 1B: RPU Connect Portal Access (continued)

After submitting the request, a new user account is created for the requestor's email address. If the email has not been registered before, the user will receive a "Forgot Password" email with instructions on how to log in for the first time.

After creating an account and signing into the RPU Connect Portal, the user will receive a notification indicating that tenant consent is required before access to aggregated building usage data can be granted.

As a non-account holder, or as a user who does not own the data for all accounts associated with a building, the user must request consent for any properties they do not have data ownership of.

When prompted with the Tenant Consent module, select the **blue "click here" link**.

- Not the account holder for any of the listed service addresses? No problem! Just click the **Request** button(s) under the **Request Consent** header to send data requests to each account holder.
- Are you the account holder for one of the listed service addresses? Click the blue "here" link and provide your account credentials to fulfill the consent requirement.
 - » To fulfill the consent requirement, please enter the account name exactly as it appears on your RPU Billing Statements, along with your account number.

Due to customer privacy requirements, you will need tenant consent to receive aggregated usage for this building.

If you are a third-party service provider or building owner/manager with tenants:

If you are NOT the customer of record for all accounts at the building, you will need to request consent from the current account holder(s); click here for the consent form to provide to the account holder(s). All requested information must be provided for the consent to be valid. Once completed, form(s) will need to be returned to Rochester Public Utilities. You will be notified via email once the aggregated data can be released and the property will be added to your Building Energy Benchmarking Portal profile. Your energy use data will display once all data privacy requirements are satisfied.

Address 🗢	Status 🗢	Request Consent
Test Ave , ROCHESTER, MN, 55901	No Request Sent	Request
Test Ave , ROCHESTER, MN, 55901	No Request Sent	Request
Test Ave , ROCHESTER, MN, 55901	No Request Sent	Request

Consent is required from the account holders at the following service addresses

Note: Unit/Suite/Apartment numbers will appear within the addresses below if they are available in our system. If unit numbers do not appear, or you do not recognize the unit numbers presented, please contact us using the links below.

IMPORTANT: This consent process is required only if you are not the account holder for these services address. If you do not have tenants and/or are the account holder for any of the listed service addresses, you can authenticate additional accourts HERE using information from your bill for that address.

Address 🗢	Status 🗢	Request Consent
Test Ave , ROCHESTER, MN, 55901	No Request Sent	Request

Connect Additional Rochester Public Utilities Account	×
Name on Account	
Exactly as it appears on your statement	
Account Number	
Exactly as it appears on your statement	

ACCOUNT HOLDERS STEP 1A: RPU Connect Portal Access NON-ACCOUNT HOLDERS STEP 1B: RPU Connect Portal Access	STEP 2: Define Your Meter Group	STEP 3: Create an ESPM Account	STEP 4: Connect to ESPM	
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STEP 1B: RPU Connect Portal Access (continued)

- · You will be prompted to enter the Building Owner information.
- · Complete the form and click "Send Request."
- A request will be generated and sent to both the building owner and the requester. The building owner will receive an email with the request details and instructions on how to approve it.
- The requester can log into the portal, but will not have access to the requested whole-building data until the owner grants approval.
- If the request is approved, the requester will receive an Owner Permission Approval email confirming access to aggregated building data. Once logged into the RPU Connect portal, the requester can access the Dashboard.
- After fulfilling the tenant consent requirements, the user will gain access to the aggregated building usage data.
- After logging in, proceed to the next page of these instructions.

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ACCOUNT HOLDERS STEP 1A: RPU Connect Portal Access NON-ACCOUNT HOLDERS STEP 1B: RPU Connect Portal Access STEP 2: Define Y Meter G	Your roup Acc	P 3: ate SPM ount	STEP 4: Connect to ESPM	
STEP 2: Define Your Meter Group After logging in, verify that all accounts you are benchmarking are linked to your RPU Connect	PUBLIC UTILIT	IES	Select Property	⇒ ¢
profile.	Test 123 Test Ave, F	OCHESTER, MN 559	01	_ +
 If you need to link additional accounts, use the Account Linking widget. 	Charts	📋 Data	? Property	Add Additional Account
» Click on the "Add Additional Account" icon*.	ſ			
» Fill out information in pop-up and click "Add Account."		Connect Add Account	itional Rochest	er Public Utilities X
		Name on Account	t .	

*If the "Add Additional Account" or "Request Whole-Building Data" options are not visible, click the gear icon in any widget.

Then, select "Add Additional Account" or "Request Whole-Building Data" to add the widget to your dashboard.



Exactly as it appears on your statement

Exactly as it appears on your statement

Account Number

Select Your Widgets	
Billing Information	
Billed Usage Last Month	Highest Billed Usage
216.0 kWh	216.0 kWh
Last Bill (05/05 - 06/06)	Highest Bill (Jun 2023)
↑ 31% from previous	last 12 months
Property	
Connect Additional Accounts	Property Profile Progress
Add Additional Account	O _% Profile Complete

Add Account

ACCOUNT HOLDERS STEP 1A: RPU Connect Portal Access NON-ACCOUNT HOLDERS STEP 1B: RPU Connect Portal Access Meter Group	STEP 3: Create an ESPM Account	STEP 4: Connect to ESPM	
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STEP 2: Define Your Meter Group (continued)

- If a user needs to request building data, they can initiate a new request using the "Request Whole-Building Data" widget.
- The user can go to the "Add Other Locations" tab to submit a new data request.
- If the user indicates they are not the building owner (submitting the "Whole-Building Data" request as a Property Manager, Third-Party, or Other), building owner consent is required before access to the requested data is granted.
 - » The whole-building data request will be generated and sent to the **building owner**, who will receive an email with the request details and instructions on how to approve it.
 - » Once approved, the property will be added to the user's Building Energy Benchmarking Portal profile. At that point, refer to Page 7 to continue with the instructions.
- If tenant consent is needed: A form will display instructing the user to obtain tenant consent.
 - » Refer to Pages 3 and 4 to complete the tenant consent request.
- If tenant consent is not required, the dashboard will refresh and display the Whole-Building meter group with aggregated usage data.
 - » Continue to Page 7 of these instructions.



Phone

Due to customer privacy requirements, you will need tenant consent to receive aggregated usage for this building.

If you are a third-party service provider or building owner/manager with tenants:

If you are NOT the customer of record for all accounts at the building, you will need to request consent from the current account holder(s); click here for the consent form to provide to the account holder(s). All requested information must be provided for the consent to be valid. Once completed, form(s) will need to be returned to Rochester Public Utilities. You will be notified via email once the aggregated data can be released and the property will be added to your Building Energy Benchmarking Portal profile. Your energy use data will display once all data privacy requirements are satisfied.

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PortfolioManager®

Welcome to Portfolio Manager

You are accessing a U.S. G

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STEP 3: Create an ENERGY STAR® Portfolio Manager (ESPM) Account

Navigate to ENERGY STAR's website to create a new account for your property in the ENERGY STAR Portfolio Manager (ESPM) platform.

 Log in or create a new account at: portfoliomanager.energystar.gov/pm

Helpful Hint: After logging in, there is no need to set up electric meters manually. They will be automatically created when you send data to ENERGY STAR Portfolio Manager[®] from your RPU Connect portal.

STEP 4: Connect to ESPM

To upload data to the Energy Star Portfolio Manager Database:

- Click the ENERGY STAR tab in the Property section.
- Select "Yes" to enable automated data transfers to your existing ENERGY STAR Portfolio Manager properties*.
- Click on the "Request Connection" button to link to Rochester Public Utilities' Contact page on the ENERGY STAR[®] Portfolio Manager (this will open a new tab in web browser).

Helpful Hint: While selecting "No, I want to characterize my property and manage benchmarking here" will provide an energy score, this option does not comply with the Minnesota Benchmarking Statute. To ensure compliance, you must select "Yes", as it is the only allowable path under the statute.

- · When the Energy Star Portfolio Manager page opens:
 - » Check Agreement box and click on the "Send Connection Request" button.
 - » After submitting the Connection Request, please allow time for the RPU Benchmarking system administrator to review and approve it.



REY STAR	lioiVianage	er®	Settings	Notifications
Send a Conne RPU Benchmarking requir information, please contac get started exchanging dat	ction Request to es the following information i t <u>RPU Benchmarking</u> . Once a.	O RPU Benchmarkin n order to exchange data with your p your connection request has been a	ng to Begin Exch roperty(ies). If you have any q ccepted, you can share individ	anging Data questions about how to complete this qual properties and/or meters with them to
Terms of Use: Agreement:	https://www.rpu.org/tem I agree to my prov Terms of Use.	ns-conditions.php vider's (<u>RPU Benchmarking</u>)		
			Send	Connection Request

Help Language: <u>English | Français | E</u>t

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ENERGY STAR Buildings Home

Take a Training

Learn More About Portfolio Manager

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STEP 4: Connect to ESPM (continued)

- To verify if your connection request has been accepted, click the "Check for My Contact Request" button.
- If the request has been approved, a green checkmark will appear.
- Once the green checkmark appears, the user can proceed with sharing data with the RPU Benchmarking ENERGY STAR Portfolio Manager web services account!

• After clicking the "**Initiate Sharing**" button, a new ENERGY STAR Portfolio Manager tab will open, allowing the property to establish data sharing.



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STEP 4: Connect to ESPM (continued)

• After completing the property data sharing form, the user will receive a confirmation message stating "Successfully Shared/Edited Access to Your Property(ies)."

- After authorizing data sharing with RPU Benchmarking, the final step to successfully upload data is to link the user's RPU data with ENERGY STAR using their Property ID.
- In the ENERGY STAR Portfolio Manager platform, the user can find their Property ID by navigating to their property in ESPM.

	instead and a second
Bulk Share Properties for Exc	hanging Data: Results
Choose Permission	ns Set Up Connections Check Existing View Results/ Confirmation
Congratulations! You have successfully A total of 1 share requests were sent. If you shared properties, you will receive a edits have been made, no acceptance is re	sharediedited access to your property(les). notification when your contact has accepted the share. If you edited access to current permissions, the quired.
Follow Us 📴 f 🛗 in	Contact Us Privacy Policy Accessibility Statement ENERGY STAR Buildings & Plants Website
MyPortfolio Sharing Reporting	Recognition
Tou nave removed the selected properties from you	
Add a Property	Dashboard Search by ID or Name
	Please refresh to see your current metrics.
Refresh to see Source EUI Trend	View All Properties (1) Energy Highlights Kerresh Metrics Add/Edit/Delete Groups Add/Edit/Delete Views Kerresh Metrics
Change Meinc	Name - Energy Current Date Score Site EUI (kBtu/ft²) + Source EUI (kBtu/ft²) + Source EUI (kBtu/ft²) + Source EUI
	W Test 48861594
	First Previous Page 1 of 1 Next Last 100 v View 1 - 1 of 1
MyPortfolio si	haring Reporting Recognition
	124 Test Ave. Deskaster MN 55004 U Mars Is
	124 Test Ave, Rochester, MN 55901 Map It
	Portfolio Manager Property ID: 48861594
	Year Built: 1990
Summary	Details Energy Water Waste

ACCOUNT HOLDERS STEP 1A: RPU Connect Portal Access NON-ACCOUNT HOLDERS STEP 1B: RPU Connect Portal Access STEP 1B: Portal Access	ar up STEP 3: STEP 4: Connect to ESPM Account STEP 5: Send Data from RPU Connect to ESPM
STEP 5: Send Data from RPU Connect to ESPM After retrieving the Property ID information, the "Link with Property ID" switch can be clicked in the RPU Connect portal.	Property Profile ENERGY STAR Link to an existing ENERGY STAR Portfolio Manager account and property? @ Yes, I want to transfer data to an existing property in my ON, I want to characterize my property and manage benchmarking here Link this property to an existing ENERGY STAR Portfolio Manager Property to initiate automated data transfer Initiate State Link this property to an existing ENERGY STAR Portfolio Manager Property to initiate automated data transfer Initiate State Link this property to an existing ENERGY STAR Portfolio Manager Property to initiate automated data transfer Initiate State Click the button below to have your ENERGY STAR Contact connection request accepted Initiate State Description Initiate State Promy our ENERGY STAR Portfolio Manager account, now select to enable Sharing for the Property where you would be builting data to transfer - requires Share Properties for Exchanging Data to be completed Initiate Sharing Initiate Sharing Initiate Sharing Initwith Property ID
 After the user has toggled the "Link With Property ID" box, an entry form will populate to allow the user to enter their Property ID. 	Establish Automated Benchmarking × Property Id : Cancel Submit
 Upon successful entry of the Property ID, a summary table will appear to validate the data the user has entered. 	ENERGY STAR Portfolio Manager × Property Id: 48861594 Property Name: W Test Address: 124 Test Ave, Rochester, MN, 55901 Primary Function:

- After successfully validating the Property ID entry, the user
- After successfully validating the Property ID entry, the user will be prompted to submit usage data for each meter to the Portfolio Manager web portal.

Service Type	Start Date	End Date	Months of data being sent
Electric (kWh)	03/01/2024	10/25/2024	8
Electric (kWh)	02/01/2023	02/29/2024	13
Water (CCF)	02/01/2023	10/25/2024	21
omatically create ne	ew usage records in Port	folio Manager as additio	onal billed usage data becomes available.
omatically create ne nis transfer may res Manager or change	ew usage records in Port ult in duplication of exist e meter selections in Por	folio Manager as additic ing usage records. If ne tfolio Manager for whicl	onal billed usage data becomes available. cessary, assign an appropriate meter deactiva h meters are included in the calculation of

Is this your property?

Supermarket/Grocery Store

ACCOUNT HOLDERS STEP 1A: RPU Connect Portal Access	NON-ACCOUNT HOLDERS STEP 1B: RPU Connect Portal Access	STEP 2: Define Your Meter Group		STEP 3: Create an ESPM Account	STEP Conne to ESP	4: ct M	STEP 5: Send Data from RPU Connect to ESPM
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Once the data is up score within the RP	loaded, the user will receive U Connect portal.	e an energy	Score Date Last Bill Dat	: 02-29-202 e : 10-25-202	94 94 STAB Portfolio N		CS
			Yes, I want ENERGY STAF Link this prop	to transfer data to an exist account erty to an existing ENERG	sting property in my	No, I want to c benchmarking h	haracterize my property and manage ree tilate automated data tranfer.

services account Contact Request Connection

Initiate Sharing 📀

Link with Property ID

M. David Bar at 1

Check for My Contact Request 🥝

- After receiving an energy score in the RPU Connect portal, the user can verify their usage data has been uploaded to ENERGY STAR Portfolio Manager by navigating to their Property.
- Within their Property, the user can navigate to the Energy tab to view their newly uploaded data.
- At this point, the user has successfully uploaded their data to the Energy Star Portfolio Manager platform, and this process has been completed.

Properties (1)	Dashboard			9	Search by ID or Name
Add a Property	Please refresh to see	e your current m	etrics.		
Refresh to see Source EUI Trend	View All Properties (1) 🗸 E	nergy Highlights	~	Refresh Metrics
Change Metric	Add/Edit/Delete Group Name - Ener Date	s <u>Ad</u> gy Current _{\$}	ENERGY STAR Score	Site EUI (kBtu/ft²)	Source EUI (kBtu/ft ²)
	Firs	t Previous P	age 1 of 1 Next Las	t 100 🗸	View 1 - 1
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W Test	124 Test Av Portfolio Ma Year Built:	ve, Rock anager 1990	hester, MN Property I	V 55901 D: 4886	Map It 61594
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W Test	124 Test Av Portfolio Ma Year Built: <u>Edit</u>	ve, Rock anager 1990	hester, MN Property I	1 55901 D: 4886	61594

1. First, from your Portfolio Manager account, you must request to Connect with the Rochester Public Utilities web

 From your ENERGY STAR Portfolio Manager account, now select to enable Sharing for the Property where you would like billing data to transfer - requires Share Properties for Exchanging Data to be completed

2. Click the button below to have your ENERGY STAR Contact connection request accepted

4. Toggle control below to enter your ENERGY STAR Property ID and initiate meter data transfer

Thank you!

User Support Email: RPUPrograms@RPU.org RPU Connect Login/Registration: <u>https://my.rpu.org</u>



RPU CONNECT

Thank you!

User Support Email: RPUPrograms@RPU.org RPU Connect Login/Registration: <u>https://my.rpu.org</u>

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