



BEUDO Reporting Guide

CITY OF
CAMBRIDGE
Office of
Sustainability

This step-by-step guide helps you set up your ENERGY STAR Portfolio Manager account and share your Covered Property’s energy data with the City of Cambridge

Energy use in buildings accounts for about 80% of GHG emissions in Cambridge, with two-thirds of the total related to commercial, institutional, and large multifamily buildings. The Building Energy Use Disclosure Ordinance (BEUDO), enacted by the Cambridge City Council on July 28, 2014, is a key step in efforts to reduce Cambridge's greenhouse gas (GHG) emissions. For more information, visit the Cambridge Building Energy Use Disclosure Ordinance website, linked [here](#).

BEUDO requires building owners to benchmark their energy use and water use using the EPA’s [ENERGY STAR Portfolio Manager tool](#) and share this data with Cambridge.

The following steps provide an overview of how to obtain property utility data from Eversource, upload data into Portfolio Manager and share data with Cambridge.

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1. Obtain energy and water data for your building(s)

If you already have an ENERGY STAR Portfolio Manager account set up with your property because of previous years' reporting, you will only need to update your meter entries for the most recent calendar year and confirm that your property(ies) is being shared with the City. Please see instructions below on creating a Portfolio Manager Account if this is the first year that you are reporting.

1a. If Eversource is your utility, request electricity and natural gas data through the [Eversource Data Portal](#). You will need to request data for the previous calendar year. For example: If you are submitting a report in 2023, you will need to request data for calendar year 2022. It may take Eversource several days to process your request for annual energy usage. They will email you spreadsheets for each fuel type with aggregate usage information. Alternatively, you can use your own copies of energy bills to update each meter for your property.

- If you submit multiple requests for the same property, please compare your data to previous years to make sure there is no data duplication.
- If your meters have changed or you have new meters, make sure to create a new search within the Eversource portal instead of using a prepopulated search from previous years. The next page contains procedures for adding a new meter in Portfolio Manager.

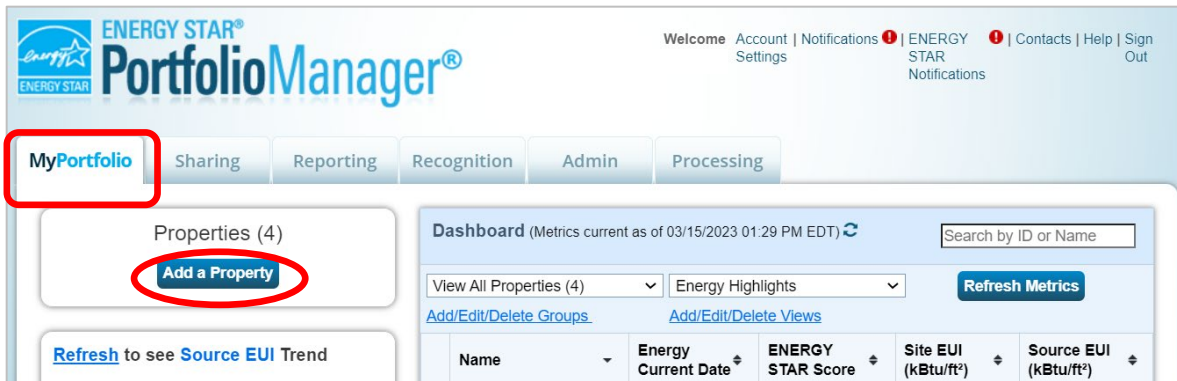
1b. If your property is receiving bills from another utility or if you would like to enter your Eversource bills, you may manually enter your data. Please proceed to the next section for the process of inputting data from these bills.

2. Set up an ENERGY STAR Portfolio Manager Account and your property(ies)

To create a Portfolio Manager account, go to: [Portfolio Manager Login](#), then click, "Create Account." Once you fill out an Account Information form and provide the requested information, an email will be sent to you with a link to activate the account. Please be aware that the email may go to your spam account.

The screenshot shows the ENERGY STAR Portfolio Manager login interface. At the top left is the ENERGY STAR logo. The main heading is 'PortfolioManager®'. Below this, on the left, is a section for new users: 'New to Portfolio Manager? Create a free account.' A blue button labeled 'CREATE ACCOUNT' is circled in red. Below this button are links for 'Contact us', 'Privacy policy', and 'Browser requirements'. On the right side, there are input fields for 'Username' and 'Password', followed by a 'Forgot username? Forgot password?' link and a blue 'LOGIN' button. At the bottom, a disclaimer states: 'You are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and subject to criminal and civil penalties. Use of the system indicates consent to monitoring and recording.'

To create a property, log in to Portfolio Manager and click on the “MyPortfolio” tab. Then click, “Add a Property” to be directed through pages that ask for Basic Property Information.



NOTE: The [ENERGY STAR Portfolio Manager FAQ site](#) and [Commercial Buildings Training](#) contain resources that detail steps and tips for creating an account and property(ies) including:

- [How do I create a Portfolio Manager account?](#)
- [How do I setup a new property?](#)
- [How to Set up a Property in Portfolio Manager \(YouTube Demo Video\)](#)
- [What are best practices for an organization to manage its properties?](#)

3. Upload energy data into Portfolio Manager

Log in to Portfolio Manager and go to the Energy tab on your property page.



Upload energy data into Portfolio Manager. If you need to add a newly installed meter or you have not set up your property's meter(s), begin at step 3a. If you have existing meters set up in Portfolio Manager, see steps 3b and 3c.

3a. If you need to add a newly installed meter or you are setting up your property's meter(s) for the first time, first confirm that the box on the left side of this page is marked that, "You Are Tracking: Total energy consumption for your property." Then click on the "Add a Meter" button on the Energy tab and follow the prompts to the usage entry page.

Your Property is: [Edit](#)

☒ A Single Building
☐ Part of a Building
☐ A Campus of Multiple Buildings

You Are Tracking: [Edit](#)
☒ Total energy consumption for your property
☐ Partial energy consumption for your property

Meters - Used to Compute Metrics (5)

[Change Meter Selections](#)
[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Diesel 154510240	Diesel		Yes
Electric Grid Meter 154518350	Electric - Grid	02/01/2023	Yes
Electric Grid Meter 154083895	Electric - Grid		Yes

Add A Meter

3b. If you are manually entering data from bills mailed to you, click on the meter that you will be uploading data for, and you will be directed to a page that lists all of your historic entries. Then click on “Add Another Entry” within the meter to add the dates and usage for each month. Be careful to enter data without gaps or overlaps in dates. Once you have filled in all new entries, scroll to the bottom of the page, and click, “Save Bills.” Follow these instructions for all meters which you need to update.

✗ [Delete Selected Entries](#)

+ [Add Another Entry](#)

 [Learn how to copy/paste](#)

✗ [Delete ****ALL**** Meter data for this meter](#)

3c. If you are using spreadsheets obtained from Eversource, click on the meter that you will be uploading data for, and you will be directed to a page that lists all of your historic entries. Before using the bulk upload tool, you will need to edit the values in the last column titled, “Estimated Value”. **Please replace the word “False” with “No” for each entry, and do so for as many meter spreadsheets you have.** Be sure to save the spreadsheets in a place where you will easily be able to find them for upload into Portfolio Manager.

	A	B	C	D	E	I
1	Start Date	End Date	Usage	Cost	Estimated Value	
2	9/1/2015	9/30/2015	4564		FALSE	
3	10/1/2015	10/31/2015	4536		FALSE	
4	11/1/2015	11/30/2015	5436		FALSE	
5	12/1/2015	12/31/2015	2343		FALSE	

Scroll to the bottom of the page to where it says, "Upload data in bulk for this meter" and click on "Choose File." Select the spreadsheet for your meter, and then click, "Upload." Once your new entries appear, scroll to the bottom of the page, and click, "Save Bills." Follow these instructions for all meters which you need to update.

Upload data in bulk for this meter:

 Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- [Copy and Paste the data into the table above](#)

No file chosen

[Cancel](#)



NOTE: If there are gaps or overlaps in the data received from Eversource, reach out to the Eversource helpdesk (EnergyDisclosure@eversource.com) to identify why there are gaps or overlaps in the data.



NOTE: If your account is already connected with the City of Cambridge Building Energy Use Disclosure Ordinance from past reporting years, you may be asked to share your new meter data. Please choose, "Read Only" access. See the section titled "[6. Share your property\(ies\) with the City of Cambridge](#)" for additional methods of sharing your property with the City of Cambridge. If your account has not yet connected with the City of Cambridge's Portfolio Manager account, these steps will be provided in step 6 of this document.

Select the permission levels you would like to grant each web services provider below:

City of Cambridge Building Energy Use Disclosure Ordinance

The following information is required by [City of Cambridge Building Energy Use Disclosure Ordinance](#) in order to provide service to your property(ies). If you have questions about how to complete this information, please contact them directly.

Meter Name	None	Read Only	Full Access
Electric Grid Meter	☐	☒	☐

Apply Selections and Authorize Exchange

Cancel

4. Upload water data into Portfolio Manager

You can collect your water bill values from the Cambridge Water Department's [Invoices Portal](#), which can also be accessed through the Finance Department's [online payments site](#). Account numbers are needed to access the bills. Please note that though the City starts pulling data on March 1st, water data for the end of the calendar year in question may not be available by that date. Please submit data for the months for which you have data; you can go back and update your water data with the remaining months when it becomes available.

You will need to manually enter each quarterly usage value into Portfolio Manager on the Water tab. To begin this process, click, "Add A Meter" on the top right-hand corner of the page. You will be prompted to select the type of water your building uses. It is OK to enter values that extend back to the previous year or go into the next reporting year, as Portfolio Manager will pro-rate the data to include only usage for the current reporting year.



Your Property's Water Usage

What kind of [water](#) do you want to track? Please select all that apply.

☐ Municipally Supplied Potable Water
☐ Municipally Supplied Reclaimed Water
☐ Well Water
☐ Other:



NOTE: If your account is already connected with the City of Cambridge Building Energy Use Disclosure Ordinance from past reporting years, you may be asked to share your new meter data. Please choose, “Read Only” access. See the section titled “[6. Share your property\(ies\) with the City of Cambridge](#)” for more details.

Select the permission levels you would like to grant each web services provider below:

City of Cambridge Building Energy Use Disclosure Ordinance

The following information is required by [City of Cambridge Building Energy Use Disclosure Ordinance](#) in order to provide service to your property(ies). If you have questions about how to complete this information, please contact them directly.

Meter Name	None	Read Only	Full Access
Potable: Mixed Indoor/Outdoor Meter	☐	☒	☐

Apply Selections and Authorize Exchange

[Cancel](#)

5. Check your data before submission

Portfolio Manager has built-in quality checks to make sure that your data are complete.

5a. Select a property from the “MyPortfolio” page. On the property’s “Summary” tab, locate the “Check for Possible Data Errors” box in the middle-right of the page. Click, “Check for Possible Errors” button.

5b. On the Data Quality Checker screen, select, “Dec 31” and choose the reporting year from the “Year Ending” fields.



NOTE: The reporting year should be the year prior to the year you are submitting. For example: If you are submitting your data in 2023, you will select 2022 in the “Year Ending Field.” This will tell Portfolio Manager to run its checks on the data for the calendar year in which you are reporting. Click, “Run Checker.”

Select Timeframe & Run Checker

We check data for a full year (12 months) of meter consumption and Property Use Details (called a [Metric Year](#)). Select a [Year Ending Date](#) and click "run checker" to see possible data issues.

Year Ending:

*

Run Checker

5c. The data quality results will generate for the time frame selected. Evaluate the results and adjust any of the errors that the data quality checker identifies for the respective property.



NOTE: For a property to show complete annual data for all meters entered in Portfolio Manager, the energy meters must span from January 1 to December 31 of the reporting year. The image below shows an example of missing meter data. You can access data specific to each meter directly from this message by clicking on the links.



There is not 12 full months of meter data.

Problem: The following meters do not have 12 full calendar months of meter entries for the year selected (01/01/2022 - 12/31/2022).

- [Electric Grid Meter](#) (missing bills for 01/01/2022 - 01/01/2023)
- [Meter 2](#) (missing bills for 01/01/2022 - 01/01/2023)

What to do:

- If you think this is a mistake, click the links above to review the entries for each meter and make corrections if necessary.

6. Share your property(ies) with the City of Cambridge

To streamline the transfer of data into the new BEUDO management platform, the City of Cambridge uses ENERGY STAR Portfolio Manager's third-party data sharing capabilities. Owners and managers are **asked to provide read-only access of their Portfolio Manager data for covered properties** with an account managed by City of Cambridge to report BEUDO data. The City **will not** have access to edit or directly view any of the building owner data.

This section contains the specific steps you need to take to connect your account to the City.



NOTE: If you have reported in past years, your account may already be connected with the City of Cambridge. See step 6d, "Check your connections," to determine if you are already connected and if your property(ies) data has already been shared.

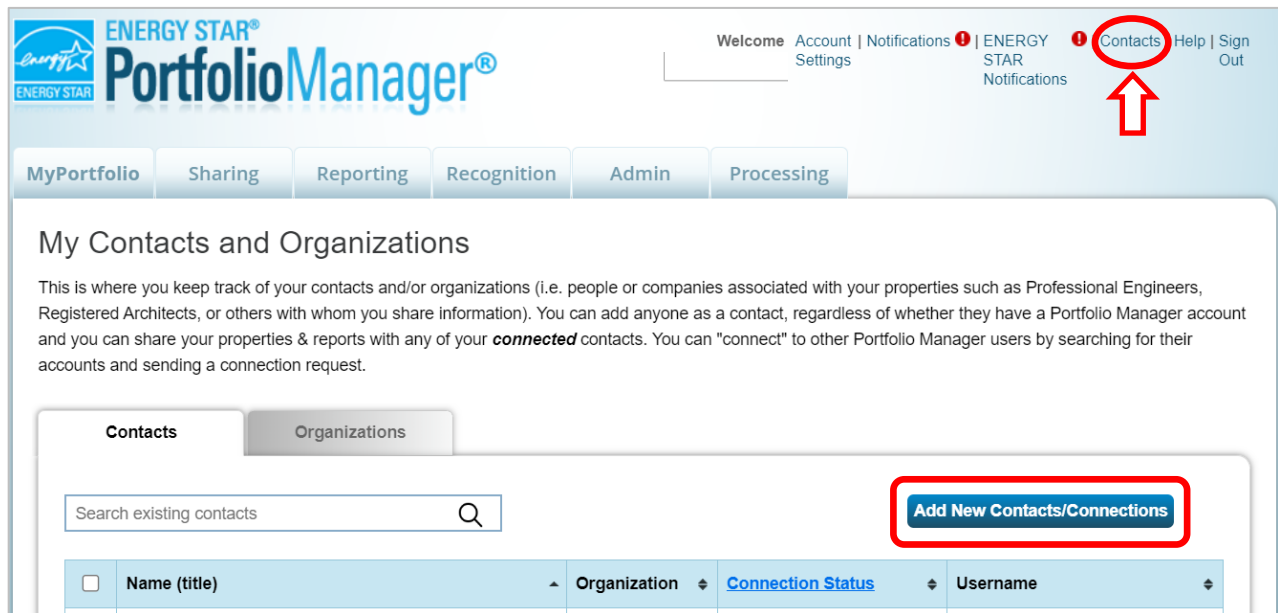
6a. Verify your account information

Before proceeding with the steps to share your data, check to ensure:

- The unique Cambridge Building IDs are entered and correct for all of your covered properties.
 - In your Homepage, click the individual property names to open their profile.
 - Under the Details Tab, scroll to the IDs box to click and view the Standard ID for that building.
- Your contact email address in Portfolio Manager is correct.
 - Go to Account Settings in the top right menu, update your email address.

6b. Connect your account to the City of Cambridge

1. Click, "Contacts" in the upper right-hand corner of the screen.
2. Click the "Add New Contacts" button.
3. Search for the username "CambridgeEnergy" with name/title "City of Cambridge Building Energy Use Disclosure Ordinance."
4. Click the blue "Connect" button.



NOTE: All connection requests must be approved before you can continue to the next step.

Portfolio Manager will approve these requests in cycles of 30 minutes. If you have not received a notification in Portfolio Manager within one hour of submitting a request, please contact the Help Desk at BEUDO@cambridgema.gov

6c. Share your property(ies)

Building owners should only share buildings which are subject to the BEUDO ordinance. Please check the City BEUDO page to verify which of your buildings are subject to reporting requirements: www.cambridgema.gov/BEUDO

1. Go to the Sharing tab:

- Click, **"Share (or Edit Access) to a property"** button.
- On the next screen: Select the properties to share and Apply Selection.
- Select, **"City of Cambridge Building Energy Use Disclosure Ordinance"** as the recipient.
- Select the **"Personalized Sharing & Exchange Data ("Custom Orders")"** option and click **"Continue."**

2. For each property that you wish to share with the City, click the button under “Exchange Data”.

Please note that this must be done for each individual property row.

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
City of Cambridge Building Energy Use Disclosure Ordinance	☐	☐	☐	☐	☒ Edit

 Some of your contacts already have access to the properties you selected. When you select "Share Property(ies)" their access levels will be changed. No acceptance is required.

[Share Property\(ies\)](#) [Cancel](#)

On the next screen, selecting the properties will open a menu allowing to specify which data attributes to share.

The City is requesting “Read Only Access” to “Property Information” and “All Meter Information.” Reporters should not share “Goals, Improvements, & Checklists” or “Recognition” information.

Select the permission level below that you would like to grant [City of Cambridge Building Energy Use Disclosure Ordinance](#) for each category.

Item	None	Read Only Access	Full Access
Property Information	☐	☒	☐
▶ All Meter Information			
Goals, Improvements, & Checklists	☐	☐	☐
Recognition	☐	☐	☐

3. Select the **“Share Forward”** option.
4. **Click**, “Apply Selections and Authorize Exchange.”
5. Exit the pop-up menu and **click**, **“Share Property(ies) to complete the data exchange.”**

Additional Options:

Item	Yes	No
* Share Forward Allow City of Cambridge Building Energy Use Disclosure Ordinance to share this property with others and give them any permissions that he/she has, including the right to share with more people.	☒	☐

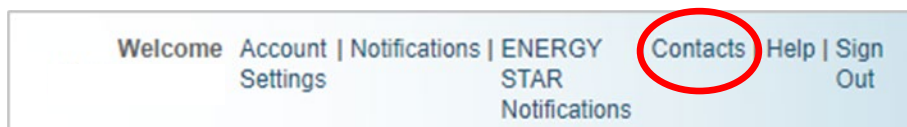
[Apply Selections & Authorize Exchange](#) [Cancel](#)

You will receive an automated message in Portfolio Manager once we receive your account connection.

6d. Check your connections

If you have reported your property(ies) energy and water data to BEUDO in past years, you may have already established a connection with the City of Cambridge and your property(ies) data may already be available to the City of Cambridge. **Please note that each covered property must be shared. If you manage several properties in your Portfolio Manager account, check that they have all been shared.**

1. Check that your Portfolio Manager account is connected to the City. Click, "Contacts" in the upper right corner. Check that the City of Cambridge Building Energy Use Disclosure Ordinance is one of your contacts and organizations.



☐	Name (title)	Organization	Connection Status	Username
☐	City of Cambridge Building Energy Use Disclosure Ordinance Environmental Planner	City of Cambridge	Web Services Connection	CambridgeEnergy

Check that all covered properties are being shared. Click, "Contacts" in the upper right corner. Click on "City of Cambridge Building Energy Use Disclosure Ordinance." Check that all properties covered by BEUDO can be accessed by Cambridge and your Portfolio Manager account. You can also edit your Contact's Permissions from this page if needed.

☐	Name (title)	Organization	Connection Status	Username
☐	City of Cambridge Building Energy Use Disclosure Ordinance <i>Environmental Planner</i>	City of Cambridge	Web Services Connection	CambridgeEnergy

[Your Name]

Properties City of Cambridge have Access to

Owned By (PDA): [Anyone](#) Shared By: [Anyone](#) In Group: [All Properties](#) [Search](#)

Name	Property Data Administrator	My Permissions	City of Cambridge's Permissions	Action
[Your Property Name]	Juliana Arroyo	Property Data Administrator	Exchange Data	I want to... View Contact's Permissions View My Permissions Edit Contact's Permissions Remove Contact's Access to Property

Page 1 of 1 100

This table represents all properties that you and City of Cambridge both share. If you wish, you can remove all of City of Cambridge's access to your properties on the [Sharing](#) tab.

7. Contact Information

The City of Cambridge hosts the BEUDO Help Desk, operated by ClearlyEnergy, to assist building owners and their agents to comply with the ordinance.

Questions related to benchmarking in Portfolio Manager, accessing energy data, and/or accessing building attribute information can be directed to the help desk by contacting: BEUDO@cambridgema.gov and (888) 506-5334.