SIEMENS

Data Sheet

Portfolio Manager

Building X



Portfolio Manager is a real-estate management tool that provides centralized access to real estate data across multiple locations. This application enhances configurability, transparency, and accuracy in performance and sustainability reporting in real estate management.

Portfolio Manager consolidates data from your entire real estate ecosystem, including third-party CRM systems, into a single trusted database that fully represents and comprehensively covers your portfolio using standardized and secure API connectivity. Portfolio Manager estimates or predicts values beyond the range of existing data, based on observed trends or patterns. It helps in filling the gaps in data for complete data analysis. Portfolio Manager enables users to monitor and manage KPIs, such as energy consumption, carbon emission, operational data, and so on from a single source, providing real-time insights, trend analysis, and outlier identification to drive action.

- Portfolio management
- Data visualization
- Seamless data integration
- Real-time insights and operational transparency
- Portfolio performance analysis and benchmarking
- Multi-stage workflow for data approvals

buildingx.siemens.com

Functions

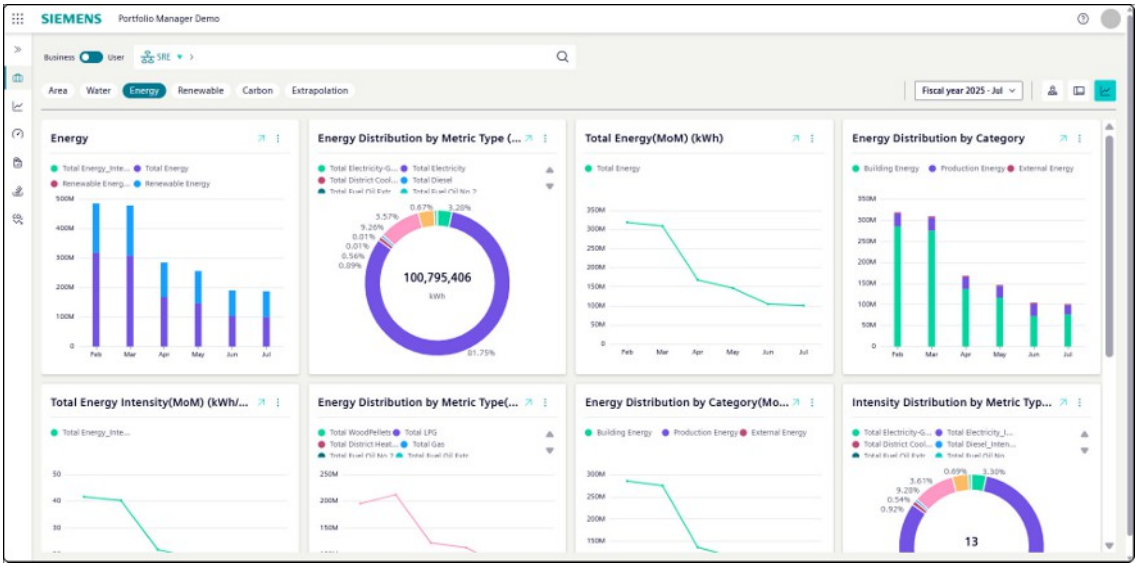
Admin Dashboard

Admin dashboard provides a centralized platform for configuring and managing various elements of the system. It allows Admin users to set up, configure, and monitor key aspects of the system, including configuring metrics and portfolios, Real Estate (RE) element types and RE elements, RE hierarchy, calculations, benchmarks, and data approval workflows.

User Dashboard

The User Dashboard provides a comprehensive view of portfolio performance, benchmarking, and reporting. It enables users to monitor, analyze, and compare key metrics of RE elements through various visualizations. It helps users in tracking progress, evaluating performance against the targets, and making informed decisions. In the User Dashboard business mode, Customer can choose from 3 available views: Split view, Map view and Chart view. In the user mode, Customer can create customized workspaces with preselected filters.

The User Dashboard also allows users to save their preferences for chart layouts and portfolio arrangements, enabling a setup that fits their individual workflow. Users can adapt their analysis on the fly by switching between different chart types instantly, providing the ability to explore data from multiple perspectives.



Configuring Element Types

Portfolio Manager allows Admin to create Virtual element Types, such as Country, Zones, Regions, and define hierarchy by assigning hierarchy orders to the element types. Configuring Buildings: The core elements in Portfolio Manager represent spaces, such as buildings, floor, or rooms, where the meters or sensors can be installed to measure data. Portfolio Manager allows users to create elements and configure them by assigning them to an element in the hierarchy, adding floors and rooms, linking data sources and metrics

Portfolio and Metric Administration

Administrators can define metric types representing parameters measured across portfolio elements, such as energy consumption, water consumption, PV generation, waste genera-tion, occupancy, or available space. Each metric can be configured with key presentation and processing attributes, including:

- Display name and identifier
- Unit of measurement
- Icon for visual identification
- Aggregation method, such as sum or average
- Sorting preference, such as ascending or descending
- Chart or visualization configuration

Metrics can be mapped to hierarchy elements and updated as portfolios or measurement sources change. Administrators can group metrics into configurable portfolios for specific business goals, such as energy. Portfolio metrics can be analyzed across the real-estate hierarchy, with access controlled through administration and permission scopes.

Data source and mapping

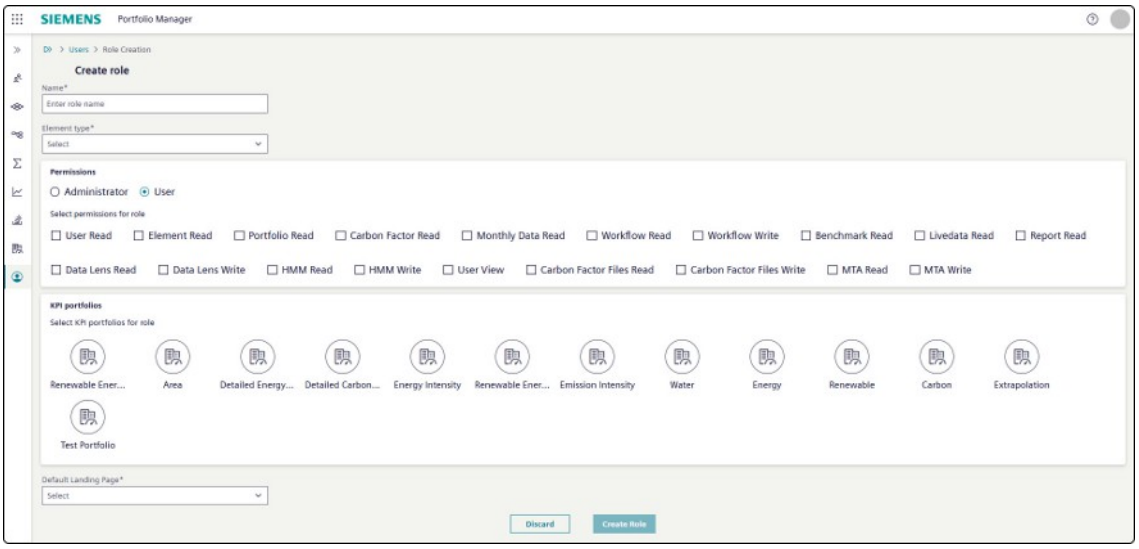
The Data Source and mapping administration helps to configure multiple sources for data retrieval. When using Building X data sources, users can aggregate information from multiple partitions into a single, unified hierarchy visualization. Hierarchy Mapping facilitates the normalization and alignment of source elements with predefined element types. Similarly, Metric Mapping synchronizes source data points with metrics to ensure consistent reporting. For information unavailable via automated systems, the Manual Data Entry Form allows for the creation of custom forms to support manual data input.

Hierarchy Administration

Portfolio Manager enables administrators to create flexible, metadata-driven hierarchies that reflect an organization’s operational structure, reporting model, or business requirements. Administrators can define the root elements such as an organization, campus, plant, or other top-level entity—and build a hierarchy with multiple levels of physical and virtual elements.

Role-Based Fine Grain Access Control

Portfolio Manager allows tailoring of user access by role, providing dedicated landing pages and module-specific permissions to match individual responsibilities. It controls data visibility so that each role only sees information related to their assigned hierarchy elements, ensuring relevant and secure access. Fine-grained access control is supported, enabling restrictions down to specific locations, buildings, or other element types as needed. The platform delivers personalized experiences by offering persona / role-based dashboards and data views, allowing every user to interact with data in a way that aligns with their personal or job function.



Custom and Predefined Calculation

The Calculation Configuration module enables authorized administrators to define and maintain the calculation logic used by Portfolio Manager’s computation engine. Administrators can configure formulas using metric types, operators, and constants, and map these definitions to the appropriate element metrics and data sources. The calculation engine applies these configurations to process source data consistently and generate derived metrics for downstream reporting and analysis. The module also includes predefined configurations like Extrapolation for handling missing or unavailable meter data, such as incomplete readings, meter failures, or offline devices. Extrapolation rules use available historical and contextual information—such as previous periods, comparable days, intensity patterns, and fallback benchmarks—to estimate the missing values.

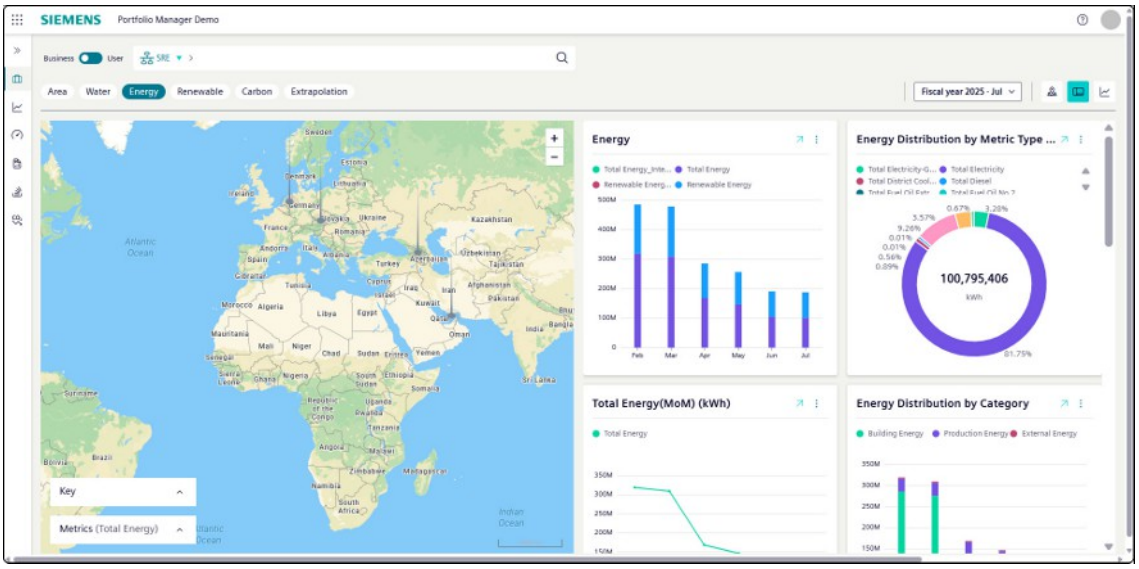
Event Hub

The Event Hub centralizes events from across Portfolio Manager, including user actions, workflows, reports, rules, data imports, and services. Users can search, filter, review, report, and export event data to CSV or Excel for analysis, auditing, and record keeping.

Event Actions allow administrators to define automated responses to events. Multiple actions, including notifications, emails, and tasks, can be executed in sequence based on event type and source, enabling consistent responses across application modules.

Data Visualization

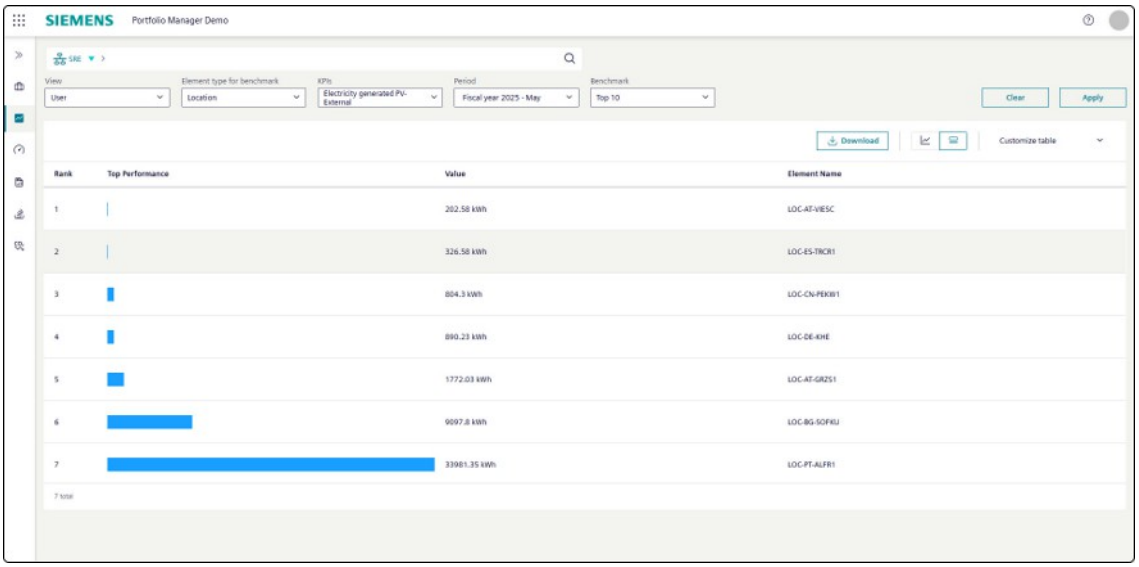
Portfolio Manager provides three different views to visualize data. Up to 20 charts can be compared to deep-dive into the data. All charts can be exported directly in PDF or CSV formats.



- **Split view**: Provides an overview of metrics, highlighting the RE elements on map in different colors according to the threshold levels and displaying metrics in the form of charts.
- **Map view**: Provides an overview of metrics, visually highlighting the RE elements on the map in different colors based on threshold levels, in the form of labels. It allows users to drill down into the RE elements from the root level to any sublevel on the map. Portfolio Manager allows users to select the metrics they want to view on the map and customize label visibility and content.
- **Chart view**: Displays metrics in the form of charts across two layers for detailed insights, including historical trends to support informed decision-making.

Configurable Benchmarking and Performance Ranking

Portfolio Manager provides the capability to create and manage benchmarks using various standards, including both preset and custom benchmarks. Preset benchmarks, such as Energy Star ratings and PV Efficiency, are defined standards used to evaluate performance against widely recognized metrics. In addition, the system supports custom benchmarks that allow users to tailor evaluations based on specific metrics and consumption or emission trends for various elements. It provides instant performance ranking by allowing users to compare Top 5, Top 10, or Bottom performers across selected metrics. Any hierarchy element can be benchmarked — from individual buildings to specific assets — using energy consumption, emissions, or other key performance indicators.



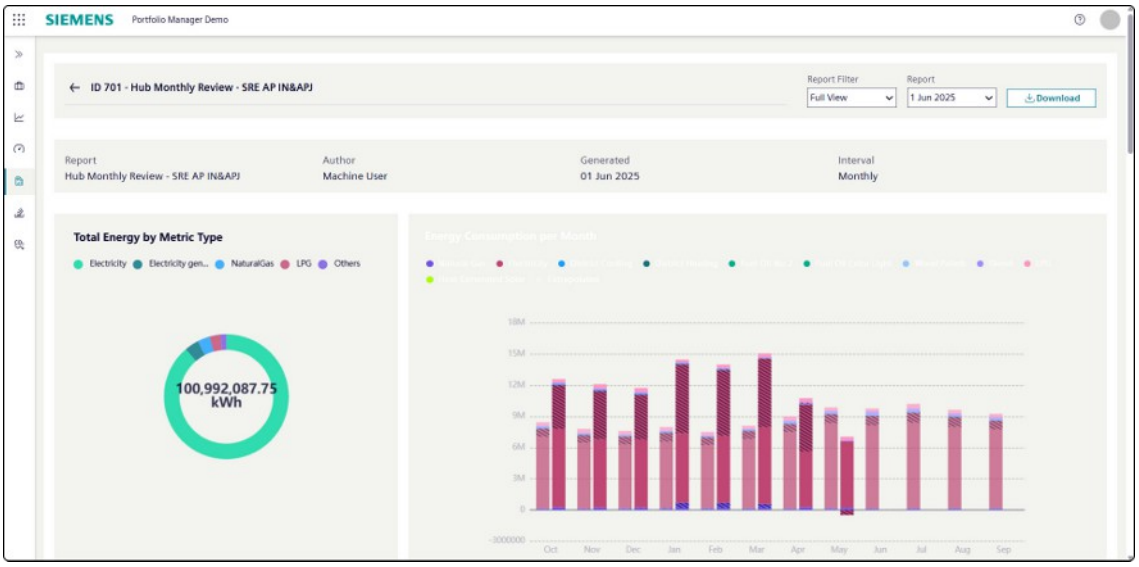
- **Chart view**: Provides benchmarking in the configured chart type, and it allows users to visualize the deviations as well in the chart.
- **List view**: Lists out all the elements based on the selected ranking and sorting order, with more details about the RE elements in a tabular format.

Near Real time Monitoring using WebSocket

The Near-Real-Time Monitoring feature enables users to view sensor and meter data directly. By enabling Live Mode, users can monitor equipment behavior through continuously updated data delivered via real-time WebSocket-based communication. The feature supports detailed analysis at the sensor/meter level, allowing users to view data at the source system's native scan frequency for high-resolution operational monitoring. Users can also switch to monthly intervals when a consolidated view of longer-term performance is required.

Reporting

Portfolio Manager generates various metric reports and the most-frequently visualized views. It also offers customized views based on user requirements. Users can download reports as well. Portfolio Manager helps users track trends and compare different aspects of their portfolio using different chart types. It simplifies the performance analysis over time, changes in values, and other key metrics.



Contextual Notifications and Task Management

The Notifications module provides a centralized mechanism for delivering timely, role-relevant information across Portfolio Manager. It converts configured system events into notifications, tasks, or emails based on the event type, source, and associated action, ensuring that users receive information relevant to their responsibilities. Users can view, filter, and manage their

notifications and assigned tasks from a unified interface. Notifications are designed to be actionable, helping users respond to operational events such as data-synchronization failures, processing delays, system bottlenecks, and other conditions requiring attention. The module also supports real-time alerts for critical events.

Data Entry Forms

The Data Entry Forms module enables administrators to design forms for capturing and maintaining portfolio data that is unavailable, incomplete, or requires manual update from connected source systems. It supports both the creation of new records and the correction or update of existing data. Administrators can configure forms for specific metrics and sub-metrics, define the applicable hierarchy levels, and determine where the data should be recorded within the real-estate hierarchy. This supports manual entry for values such as carbon factors, costs, and other business or operational metrics. Users can select the appropriate form, choose the relevant portfolio element or hierarchy level, and enter data for a defined month or month range. The captured information can then be incorporated into the Portfolio Manager data model for use in calculations, reporting, and analysis.

Manual Data Forms

Carbon Factor Management enables users to maintain Scope 1, Scope 2, biogenic, residual, and GHG factors using data forms. Factors can be entered for selected hierarchy elements and time periods, supporting global, national, and site-specific values.

Cost per Unit Management enables users to maintain unit costs for energy, water, and other commodities when source data is unavailable or incomplete. Administrators define the applicable metrics and hierarchy levels, while users enter costs by hierarchy element, commodity, and time period.

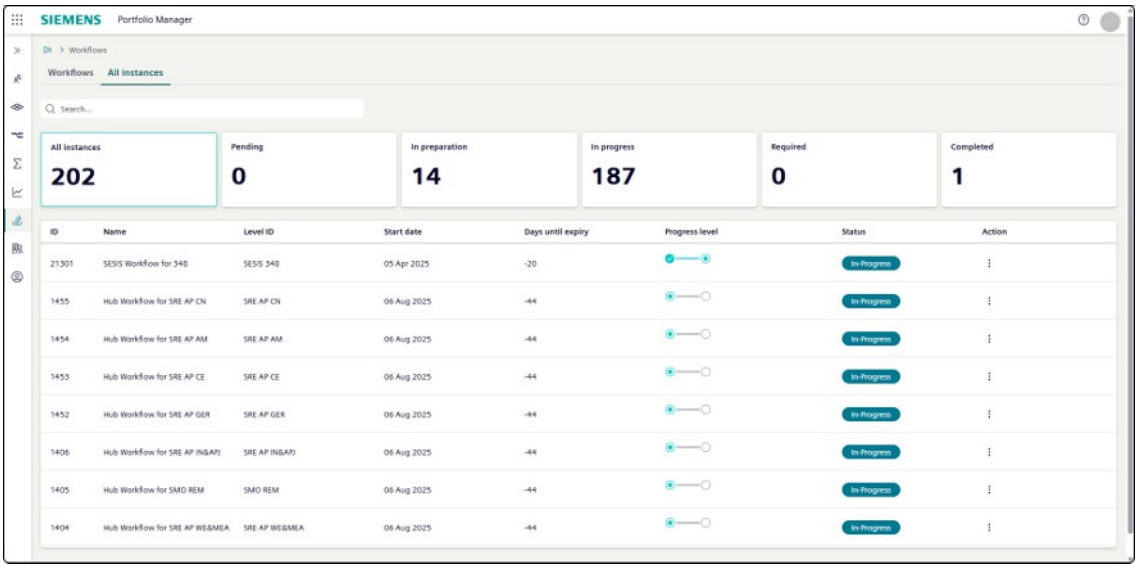
Metric Data Correction enables users to correct inaccurate, incomplete, or erroneous metric values from connected source systems using data forms. Administrators define the applicable metrics and hierarchy levels, while authorized users enter corrected values by hierarchy element and time period.

Time-Aware Meter/Sensor Mapping

The Meter and Sensor Mapping feature in the admin module enables administrators to associate meters and sensors with the appropriate physical or virtual elements within the real-estate hierarchy. Mappings can be configured at different hierarchy levels, including buildings, floors, rooms, sites, zones, and other reporting elements. The feature supports flexible onboarding and ongoing maintenance of meter configurations. Administrators can add new meters, deactivate or remove obsolete mappings, and remap meters or sensors when organizational structures, asset ownership, site configurations, or data-source arrangements change.

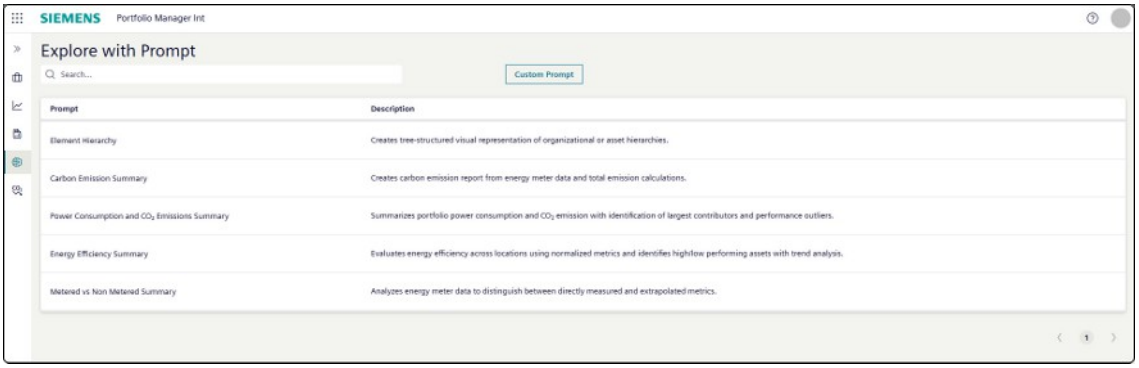
Workflow Management

Portfolio Manager streamlines and automates data approval workflows across multiple stages. It provides an efficient approval workflow system for timely reporting. Admin can create workflows, define multiple stages, and assign approvers for each stage in the workflow. Approvers can compare live data with historical snapshots for each instance and take actions, enabling informed decision-making. The workflows are created based on the scheduled events or manually by Admin. Key features include automatic notifications, customizable approval settings, advanced filters, actionable history, and the ability to handle issues efficiently. Whether triggered manually or by a scheduled event, Portfolio Manager ensures that the approval process is transparent, organized, and tailored to specific organizational needs.



Explore Data with GenAI

Portfolio Manager features an intelligent data analysis capability that leverages Generative AI to provide instant insights and visualizations across your data hierarchy. The feature supports both custom prompts tailored to specific business needs and pre-defined prompts for common analysis scenarios, which can be deployed at any level of your data structure for flexible scope control. Responses are delivered in two formats: descriptive textual insights that provide detailed summaries and recommendations, or visual analytics that automatically generate charts and plots to reveal data patterns and trends. This enables users to quickly transform raw data into actionable intelligence, supporting everything from data exploration and trend analysis to executive reporting and performance monitoring, ultimately accelerating decision-making and deepening understanding of information assets across the entire data ecosystem.



File service

File service provides a secure, document management solution that ensures data isolation and role-based access control. It features Folders for collaborative sharing, Personal Folders for private files. The system operates under granular permissions, facilitating secure organizational collaboration while explicitly excluding the storage of confidential documents.

Building X Platform

Accounts Application

Ability to manage users with a role-based access control. New users can be invited to access the Cloud Service and given appropriate access rights via user groups. Users can log in with two-factor authentication and manage their user account themselves. Data can be logically grouped into partitions and given access via user groups.

Portfolio Manager allows Admin to create multiple roles with different scopes and assign them to users to manage different portfolios. Portfolio Manager allows Admin to add a new customer, remove an existing customer, or edit the details of an existing customer. The customers can be onboarded at any level of the hierarchy.

Portfolio Manager supports multiple tenants and ensures that each tenant's configurations are isolated and managed independently. It provides a secure and customized experience for each tenant.

Data Hosting and Data Usage

Hosts and processes personal and non-personal data in data centers located in Europe. For information regarding processing of personal data and locations Customer may refer to the Data Privacy Terms: https://siemens.com/dpt

Subscription

The subscription plan depends on the agreement between Customer and Siemens.

1) Default Subscription Plan if the customer purchases the subscription via the Siemens online store

	Subscription name
Functions	
Building X Platform	✓
Admin & User dashboard	✓
Configuration of metrics, portfolio and element types	✓
Data source and mapping	✓
Hierarchy administration	✓
Role-based fine grain access control	✓
Custom and predefined calculation	✓
Event hub	✓
Data visualization	✓
Configurable benchmarking and performance ranking	✓
Near real-time monitoring using WebSocket	✓
Reporting	✓
Contextual notifications and task management	✓
Data entry forms	✓
Manual data forms	✓
Time-aware meter/sensor mapping	✓
Workflow management	✓
Explore data with GenAI	✓
File service	✓
Terms	

Subscription metric	per 50 / 200 / 1,000 data points per year
Subscription term	Annually, auto-renewal
Billing term	Annually, payment in advance
Upscale	Effective immediately, pro-rated billing
Downscale/Cancellation	Effective with end of subscription term
Connected Devices	To be purchased separately
Permitted Users	Unlimited, Extended Use

The Portfolio Manager subscription plan is the regular, scalable Offering for this Cloud Service. The subscription term is twelve (12) months with automatic renewal; the Cloud Service fee is paid in advance. The subscription plan can be upscaled at any time and Cloud Service fees for upscales are calculated on a pro-rated basis. The Customer can also scale down the Cloud Service effective with the end of the current subscription term. The subscription fee will be adjusted for the upcoming billing term. The Cloud Service can be cancelled any time, effective with the end of the current subscription term.

The Portfolio Manager subscription plan can be purchased in packages of 50 data points, 200 data points or 1,000 data points per year. A data point is a discrete unit of information, e.g. a temperature sensor value.

Customer may purchase required Connected Devices separately.

Extended Use entitles Customer to authorize its Affiliates and third parties to access and use the Cloud Services in accordance with the rights set out in the Terms and Conditions.

2) Custom Subscription Plan

Any subscriptions that are not purchased via a Siemens online store are Custom Subscription Plans. Under a Custom Subscription Plan the details regarding functions, subscription metric, term, billing, up- and downscaling, Connected Devices as well as Permitted Users are set out in the agreement between the Customer and Siemens.

Prerequisites

Supported Connected Devices

The Cloud Service is currently compatible with commercially available Connected Devices. Connected Devices enable the Cloud Service to exchange data with the technical building infrastructure. A description of the available Connected Devices is provided below.

	List of Supported Connected Devices
SIEMENS: Connect X200	The Connect X200 edge gateway is powered with DC 24V or AC 24V and may require an enclosure. The Connect X200 includes embedded software (for example, firmware and factory installed applications collectively referenced herein as Software) to supply building data to this Cloud Service.
SIEMENS: Connect X500	The Connect X500 edge gateway is powered with DC 24V and may require an enclosure. The Connect X500 includes embedded software (for example, firmware and factory installed applications collectively referenced herein as Software) to supply building data to this Cloud Service.
SIEMENS: Connect Software	Connect Software edge gateway is running on Windows 10 or Windows 11 Hyper-V and requires computer hardware. Connect Software includes multiple software applications collectively referenced herein as Software to supply building equipment data to this Cloud Service.
SIEMENS: Desigo CC	Desigo CC software product is running on Windows computer hardware. The supported software version is Desigo CC V7 or higher. Desigo CC includes multiple software extensions collectively referenced herein as Software to supply building data to this Cloud Service.
SIEMENS: Connect Box	Connect Box hardware is powered with DC 24 V. Connect Box includes Software and BSP version V5.x.x or higher to connect to this Cloud Service. The building management data hosted on the hardware can currently only be accessed in read-only mode.
SIEMENS: Desigo SLX (Niagara Framework)	Desigo SLX / Niagara Framework® running as Supervisor on a PC or JACE® is supported for this Cloud Service. The supported Niagara versions are 4.14 and 4.15. The Building X Connector for Niagara™ must be deployed on the Niagara Framework® to supply building data to this Cloud Service. The Tridium EULA is applicable, see https://www.tridium.com/us/en/eula. Niagara FIPS mode and web proxy configuration are not supported.

To use the Cloud Service, a Connected Device must be installed on site, fully operational and connected to the Internet. The Customer is responsible for the provision of the Connected Device on site and all associated costs for the provision of the Cloud Service in accordance with the associated documentation for the Connected Device.

Supported Third-Party Software Connectivity

The Cloud Service is currently compatible with commercially available Third-Party Software. Third-Party Software Connectivity enable the Cloud Service to exchange data with Third-Party Software. A description of the available Third-Party Software connectivity is provided below.

	List of Supported Third-Party Software
Building X Point Value Ingest API	REST API
Software Specific connectors	• Siemens Navigator • Snowflake Software • Planon Software

The customer is responsible for the Third-Party Software at the site and all associated costs for the provision of the cloud service in accordance with the associated documentation for the Third-Party Software.

Web browser and Viewing Devices

Chrome is recommended to use the Cloud Service, but other standard browsers might also serve this function. Screen resolution of 1920x1080 pixels or higher is recommended for best user experience.

Internet Connection

The bandwidth of Customer's internet connection determines the performance of the Cloud Service.

Ordering

To order a subscription plan and connected devices, Customer must request a quote from its Siemens sales representative.

Product Documentation

1) Product Documentation under a Standard Subscription Plan

General Contractual Documents	Links
Building X - Portfolio Manager Data Sheet	www.siemens.com/buildingx/data-sheet/portfolio-manager
Supplemental Terms for Buildings	www.siemens.com/buildingx/data-sheet/supplemental-terms
General Software Terms and Cloud Supplemental Terms	https://www.siemens.com/si/cloud/terms
Base Terms International	https://www.siemens.com/si/cloud/terms
Siemens Acceptable Use Policy	https://www.siemens.com/si/cloud/terms
Minimum Terms	www.siemens.com/buildingx/data-sheet/minimum-terms
Data Privacy Terms	https://www.siemens.com/dpt/si
Data Privacy Terms Annexes Building X	https://www.siemens.com/dpt/si
EU Data Act	https://www.siemens.com/buildingx/terms

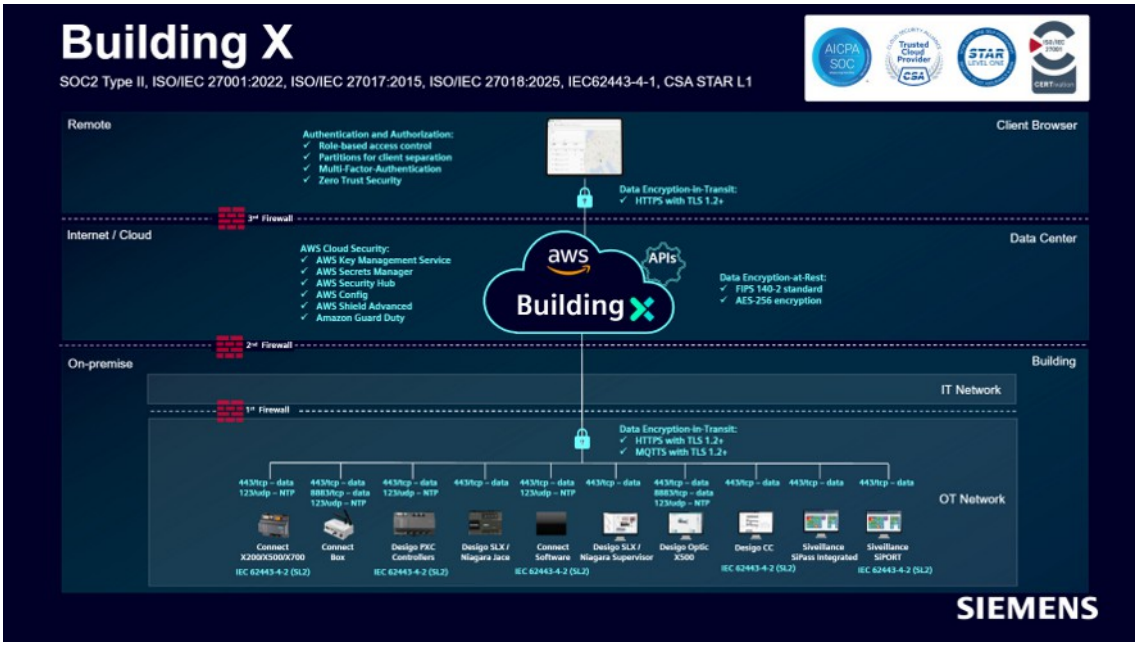
2) Product Documentation under a Custom Subscription Plan

The contractual documents and the Product Documentation are set out in Siemens' offer to the Customer.

3) Technical Documents

Technical Documentation	Link
Building X - Online help	www.siemens.com/buildingx/sid

Topology



The topology shows the superset of possibilities for connecting data to Building X. The options available for this Digital Service can be found in the list of supported connected devices and third-party software connectivity.

Data communication between the Connected Devices on-premises and the Cloud Service requires internet connectivity (to be provided by the Customer).

Specific Terms

High-Risk Use

Customer acknowledges and agrees that:

a) the Offerings are not designed to be used for the operation of or within a High-Risk System if the functioning of the High-Risk System is dependent on the proper functioning of the Offerings; and
b) the outcome from any processing of data through the use of the Offerings is beyond Siemens' control.

Service Level Agreement

Siemens shall use commercially reasonable efforts to make the Cloud Services available for a yearly uptime percentage of ninety-eight percent (98%).

Except for:

a) Planned downtime, agreed downtime, routine and emergency maintenance,
b) Cyberattacks,
c) the public, third party and/or customer's internet and communications networks,
d) data, software, hardware, telecommunications, infrastructure, power, build-packs or networking equipment not provided by Siemens,
e) Customers and Users negligence or failure in using the Cloud Service and/or in not following the instructions of published documentation,

f) system configurations and platforms not supported by Siemens,
g) system administrations, action, commands and file transfers of Customer or User,
h) modifications or alterations not made by Siemens,
i) unauthorized access via Customer's credentials and/or
j) any other failure outside of Siemens reasonable control.

Customer Support

Siemens offers helpdesk support. Customer may contact its local Siemens representative for support requests. Customers can also submit a support request online: https://www.siemens.com/support-request.

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