

City of Seattle, Seattle City Light

Portfolio Manager Automated Benchmarking Authorization



AUTHORIZATION CREDENTIALS to be completed by Seattle City Light:

Please read our Terms and Conditions:	http://seattle.gov/light/accounts/energyusage/docs/abs_tcs.pdf
Meters included in profile:	Verify the meters listed in the attachment are accurate. If you do not agree with the meter list or if there wasn't an attachment, email scl_portfolio_manager@seattle.gov
Authorized Portfolio Manager Username:	(You must login to Portfolio Manager with this Username .)
Virtual Meter Name:	(In Portfolio Manager , use this as your meter's name .)
Service Order:	(In Portfolio Manager , this is your meter's unique Service Order .)

NEW! Customer Procedures for Portfolio Manager

Part 1 – Authorization, Connecting to SCL and Adding a Property

NOTE: Please be aware of the **Portfolio Manager** browser requirements, explained at <http://portfoliomanager.supportportal.com/ics/support/KBAnswer.asp?questionID=34354>

- Log in to **Portfolio Manager**, at <https://portfoliomanager.energystar.gov/pm/login.html>, with the **Authorized Portfolio Manager Username**, listed above.
- If you have **not** previously connected to SCL using the Username, above, you will need to establish a connection. To do so,
 - Click the **Contacts** link in the upper right hand corner, then, leaving the search box empty, click the **Search** button.
 - Under **Your Search Criteria**, enter “SCL” as **Name**, then press **Enter** or click **Search**.
 - From the list of contacts on the right-hand side, locate “SCL Portfolio_Manager.”
 - Click the **Connect** button to the right of the name. When prompted, enter your **Portfolio Manager Username** *in all upper case letters*, check the **Terms of Use** “Agreement” box, then choose the **Send Connection Request** button. This connection request should be accepted within approximately 1 hour.
- While you are waiting for your connection request to be accepted by SCL, you can add your property to **Portfolio Manager**. To set up your building, on the **MyPortfolio** tab, in the **My Properties** section,
 - Click the **Add a Property** button, which takes you to “Set up a Property: Let's Get Started!”
 - Answer the questions on this page, then proceed through the building setup by choosing the blue “**Get Started!**” or “**Continue**” buttons at the bottom of each page.

NOTE: If you are obtaining SCL usage data to comply with Seattle's Benchmarking Ordinance, please review the “**How to Comply**” steps at www.seattle.gov/energybenchmarking when setting up your property.

Part 2 – Connection Approval, Virtual Meter Setup and Sharing Your Property and Meter

Once you have received the connection approval, you may set up the virtual meter based upon the information provided by SCL, above. **NOTE:** If you are continuing immediately after completing **Part 1**, above, skip **Step 1**, below.

- In **Portfolio Manager**, on the **MyPortfolio** tab, under **My Properties** section, click on the **Building Name**, which will bring up that building's information.
- Still on **MyPortfolio** tab and under the building's information, click the **Meters** tab.
- Then, under the **Energy Meters** heading, click on the **Add Another Meter** button.
- In the **Get Started Setting Up Meters** section, answer the questions about the meters for your building:
 - Under “**Sources of Your Property's Energy**” check **Electric**, and then select **purchased from the grid**.
 - Under the **How Many Meters** field, always enter “1”
 - Scroll down and click on the **Get Started** button, below.
 - On this page, in the **Meter Name** column, click on the words “**Electric Grid Meter**” then
 - delete the existing name and replace it with the **Virtual Meter Name** we provided, above. **NOTE:** It is best to copy the “**Virtual Meter Name**” from this document, then paste it into **Portfolio Manager**.
 - under **Units**, select “**kWh (thousand Watt-hours)**”,

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- under **First Bill Date**, click on the calendar icon, and select today's date.
- Click **Continue**.
- e. On the next page, click the **Finish Meter Set Up** button.
 - When successful, on the next page you will receive the message, "**Congratulations! You have successfully associated meters to your property**" in a green box towards the top of the screen.
- f. In the **Property Totals** section, under **Energy Meters**,
 - in the **Meter Name** table, check the box next to this property's virtual meter name, then just under that select "**These meter(s) account for the total energy consumption for this property**" button.
 - At the bottom of the screen, click the button to **Apply Selections**.

Once your meter has been associated with your property, you will need to share your property with SCL, which will also share the virtual meter associated with the property.

- g. Click the "**Share**" button in the "**Sharing this Property**" section, to the right.
- h. Under the heading **Select Properties to Share**, using the drop-down list, select **One Property** and in the drop-down list to the right of that, select your building's name.
- i. Under the section "**Select People (Accounts) to Share With**", in the box below "**Select contacts from my contacts book**" click on "**Portfolio_Manager, SCL**" and select the **Continue** button. This takes you to the **Sharing** tab.
- j. In the table of properties, in the **Exchange Data** column, click the button, which will bring up a pop-up window.

NOTE: Next, you will enter the **Service Order** number, found above, in two places. At the top of the of the popup window AND in the table to the right of your **Meter Name**.
- k. Enter the following into the table,
 - for the **Property Information** row, choose the **Read Only Access** button
 - for the row containing your Virtual Meter name, choose the **Full Access** button
 - for any other meters listed, choose the **None** button
 - all other buttons should be left with **None** selected.
- l. Scroll down in the popup window, then click "**Apply Selections & Authorize Connection**"
- m. Next, choose the **Share Property(ies)** button, and you're done!

When successful, you will receive the message, "**Contratulations! You have successfully shared your property(ies) and you will receive a notification when your contact has accepted the share. See the [Sharing](#) tab for details.**" You should see data in your virtual meter within approximately four hours.

Steps to Comply with City of Seattle Benchmarking Ordinance

IMPORTANT: You must complete the **Steps to Comply** with City of Seattle Benchmarking Ordinance

By obtaining automated electric energy usage from City Light, you are on Step 3 of 6 **Steps to Comply**. Please visit www.seattle.gov/energybenchmarking and go to "**How to Comply**" to review Steps 1 & 2 and learn more about these final steps:

- If your building is also served by natural gas or steam, obtain usage data and set up meters in **Portfolio Manager** (Step 3).
- Confirm the **Energy Use Intensity (EUI)** of the building for the required year by printing a **Statement of Energy Performance** from **Portfolio Manager** (Step 4).
- Add **City of Seattle Annual Reporting** as a contact in **Portfolio Manager**. Contact requests are accepted hourly—look for a confirmation email (Step 5).
- **Share Property** to report the **EUI to City of Seattle Annual Reporting** (Step 6).
 - Choose **Exchange Data**.
 - Enter the **City of Seattle Building ID***.
 - Select **Read Only** (*not Full Access*) for the **Property Information, All Meter Information, and Goals, Improvements & Checklist**.

*If you don't know the City of Seattle Building ID, or need help, email energybenchmarking@seattle.gov or phone (206) 727-8484 (M-F 8am-5pm).

Questions regarding getting your data?
Email us at SCL_PORTFOLIO_MANAGER@SEATTLE.GOV or leave us a voice message at 206-684-7557

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