

PART 1: Authorization Credentials *(Information provided by Seattle City Light)*

Please read our Terms and Conditions:	<a href="https://seattle.gov/city-light/business-solutions/business-billing-and-account-information-building-energy-consumption-data">seattle.gov/city-light/business-solutions/business-billing-and-account-information-building-energy-consumption-data</a>
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 was no attachment, email <a href="mailto:scl_portfolio_manager@seattle.gov">scl_portfolio_manager@seattle.gov</a>
Authorized Portfolio Manager Username:	
Virtual Meter Name:	
Parent Premise ID:	

## PART 2 - Customer Procedures for Portfolio Manager

**A. Connecting to Seattle City Light (SCL)**

In order to comply with the City's [Energy Benchmarking and Reporting Ordinance](#), it is necessary to create a pathway for Seattle City Light to send your energy usage data to the [U.S. EPA's Portfolio Manager](#). The following steps will walk you through how to create this connection.

1. Log in to **Portfolio Manager**, at <https://portfoliomanager.energystar.gov/pm/login.html>, with the **Authorized Portfolio Manager Username**, listed in **Part 1**, above.
2. If you have previously created a connection to SCL using this username, proceed to **Step B**. Otherwise, if you have not previously connected to SCL using this username, you will need to establish a connection. To do so,
  - a. In the upper right corner, click the **Contacts** link. The **My Contacts** screen will appear.
  - b. Leaving the search box empty, click the **Search** button.
  - c. In the **Your Search Criteria** panel, enter "SCL" in the **Name** field, then click the **Search** button.
  - d. From the list of contacts on the right, locate "SCL\_Portfolio\_Manager" and click the **Connect** button to the right of the name. **NOTE:** If you don't see SCL\_Portfolio\_Manager in the list, you are already connected and should proceed to **Step B**.
  - e. On the **Connection Request** screen, enter the username from **Part 1**, above, in all uppercase letters, check the **Terms of Use** "Agreement" box, then click the **Send Connection Request** button. This connection request should be accepted within approximately 1 hour.

**B. Adding a Property**

While you are waiting for your connection request to be accepted by SCL, you can add your property to **Portfolio Manager** if it is not already created. (If it has been created, skip to Part C).

**To set up a property:**

**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](http://www.seattle.gov/energybenchmarking) when setting up your property.

1. Click on the **MyPortfolio** tab.
2. In the **My Properties** panel, click on the **Add a Property** button. The **Set up a Property: Let's Get Started!** screen will appear.
3. Answer the questions on this screen, then proceed through the building setup by choosing the **Get Started!**, **Continue** or **Add Property** buttons at the bottom of each screen. When complete, the "Congratulations! You have successfully created your property..." message will appear.

**C. Setting Up Your Virtual Meter**

Once you have received the connection approval from SCL, you may set up the virtual meter based on the information provided in **Part 1**, above. **NOTE:** If you are continuing immediately after adding your property, skip **Step 1**, below.

1. Click on the **MyPortfolio** tab. In the **My Properties** panel, click on the **Building Name**. The property **Summary** screen will appear.

Questions regarding sharing your data?

Email us at [scl\\_portfolio\\_manager@seattle.gov](mailto:scl_portfolio_manager@seattle.gov) or leave us a voice message at 206-684-7557



## PART 2 - Customer Procedures for Portfolio Manager *(Continued)*

2. Below the **MyPortfolio** tab is a second set of tabs. Click the **Energy** tab.
3. Under the **Energy Meters** heading, click on the **Add a Meter** button. The **Get Started Setting Up Meters** screen will appear.
4. Answer the questions about the meters for your building:
  - a. Under **Sources of Your Property's Energy** check **Electric**, then select **purchased from the grid**.
  - b. In the **How Many Meters** field, always enter "1".
  - c. At the bottom of the screen, click the **Get Started** button, which brings up the **About Your Meters** screen.
5. In the **Meter Name** column, click on the words "**Electric Grid Meter**."
  - a. Delete the existing name, replacing it with the **Virtual Meter Name** provided in **Part 1**, above.  
**NOTE: It is best to copy the Virtual Meter Name from this document, then paste it into Portfolio Manager.**
  - b. Under **Units**, select **kWh (thousand Watt-hours)**.
  - c. Under **Date Meter Became Active**, enter "**01/01/2009**". Leave **Inactive** date blank and "**Enter as Delivery**" unchecked.
  - d. Leave **In Use?** Box Check-marked.
  - e. Click the **Create Meters** button.
  - f. On the **Your Meter Entries** screen, click the **Continue** button. This brings you to a new screen, which displays the message, "**Your meter entries have been added to your meters.**"
6. In the **Energy Meters** table,
  - a. Check the box next to this property's virtual meter name, then select the "**These meter(s) account for the total energy consumption for this property.**" button.
  - b. At the bottom of the screen, click the **Apply Selections** button.

### D. Sharing Your Property and Meter with SCL

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.

1. Go to the **Sharing Tab** and click **Share (or Edit Access to) a Property**.
2. In the **Select Properties to Share** section,
  - a. Use the drop-down list to select **One Property**, which brings up another drop-down box.
  - b. In the second drop-down list, choose your property's name.
3. Select contact, **SCL\_Portfolio\_Manager**
4. Under **Choose Permissions**, select the second option, "Personalized Sharing & Exchange Data (Custom Orders), Click **Continue**.
5. In the table of properties, click the button under the **Exchange Data** column, which brings up a pop-up window.
  - a. "You will enter the **Parent Premise ID** provided in **Part 1**, in two places: 1) in the **Premise ID** field near the top of the popup window and 2) in the **Premise ID** column to the right of the **Virtual Meter Name**".
  - b. On the **Property Information** row, choose the **Read Only Access** button.
  - c. On the **Virtual Meter Name** row, choose the **Full Access** button.
  - d. For any other meters listed, choose the **None** button.
  - e. All other buttons should be left with **None** selected.
  - f. Scroll down. For **Share Forward**, select "No".
  - g. Click **Apply Selections & Authorize Connection**.

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- h. This will open the **Sharing** window again. Click on the **Share Property(ies)** button to finish.
6. When successful, you will receive the message, *"You have successfully shared your property(ies) ...."*
7. You should see data in your virtual meter within approximately four hours.

### PART 3 - 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 Seattle City Light, you are on the 3rd of 6 **Steps to Comply**. Please visit [www.seattle.gov/energybenchmarking](http://www.seattle.gov/energybenchmarking) and go to **How to Comply** to review Steps 1 & 2 and learn more about these final steps:

1. If your building is also served by natural gas or steam, obtain usage data and set up meters in **Portfolio Manager** (Step 3).
2. Confirm the **Energy Use Intensity (EUI)** of the building for the required year (Step 4).
3. Add **City of Seattle Annual Reporting** as a contact in **Portfolio Manager**. Contact requests are accepted hourly—look for a confirmation email (Step 5).
4. **Share Property** to report the **EUI to City of Seattle Annual Reporting** (Step 6).
  - a. Choose **"Personalized Sharing & Exchange Data"**.
  - b. Enter the **City of Seattle Building ID\***.
  - c. Select **Read Only** (*not Full Access*) for the **Property Information, All Meter Information**, and Goals, Improvements & Checklist. For share Forward, Select **"No"**.

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