

>> SEATTLE CITY LIGHT DATA EXCHANGE



Phone: (206) 684-7557

Email: scl_portfolio_manager@seattle.gov

Website: www.seattle.gov/light/accounts/energyusage

Tip See Appendix Submitting Seattle City Light Data Exchange Authorization for more detailed instructions on how to complete and submit the Automated Benchmarking Authorization form.

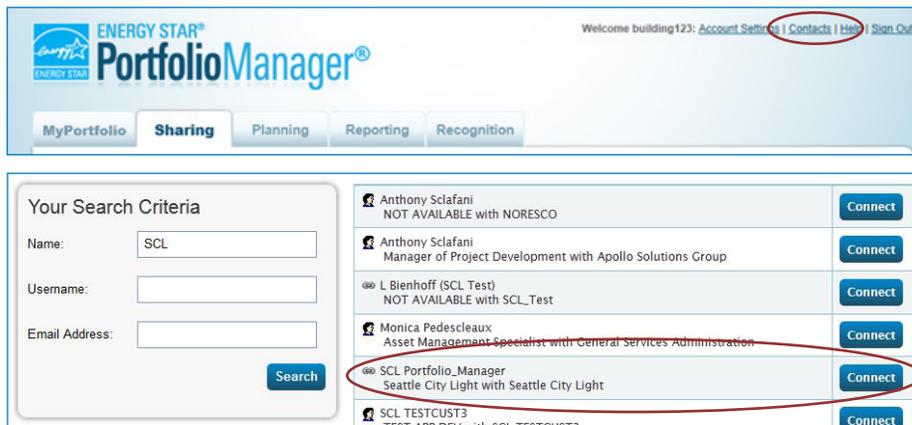
1. Fill Out & Submit Consumption Request Form

- Visit www.seattle.gov/light/accounts/energyusage to complete and send the **Portfolio Manager Automated Benchmarking Consumption Request** form and agree to the **Terms and Conditions**.
- Your Request form will be processed within four business days. Look in your email for the **Automated Benchmarking Authorization** form from SCL.

2. Authorization and Connecting to SCL

IMPORTANT: These screenshots supplement the instructions provided on SCL's **Automated Benchmarking Authorization** form, which you must have to proceed.

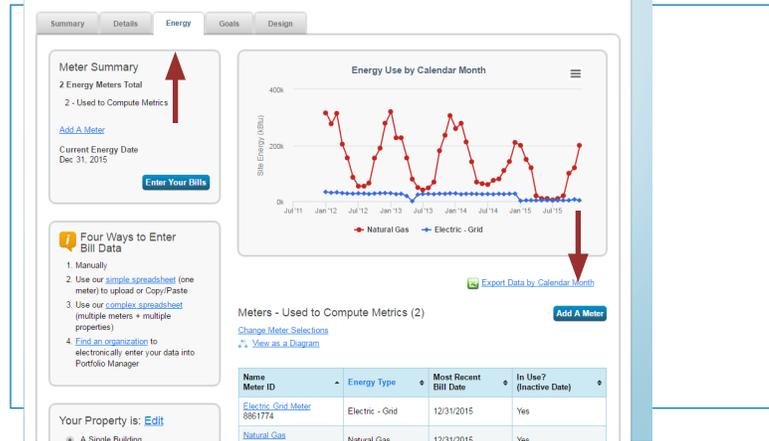
- Log in to Portfolio Manager with the **Authorized Portfolio Manager Username** listed on your **Seattle City Light Authorization form**.
- If you **have not previously added SCL** as a contact, you will need to add them:
 1. Click the **contacts** link in the upper right hand corner, then, leaving the search box empty, click the Search button.



2. Under **Your Search Criteria**, enter **SCL** as Name. Enter or click Search.
3. From the list of contacts, locate **SCL Portfolio_Manager**.
4. Click the **Connect** button to the right of the name.
5. When prompted, enter your **Portfolio Manager Username in all uppercase letters**, check the Terms of Use and then **Send Connection Request** button.
6. This connection request should be accepted in approximately 1 hour. **Please wait before proceeding.**

3. Connection Approval and Virtual Meter Setup

- ❑ In Portfolio Manager, on the **MyPortfolio** tab, under the **My Properties** section, click on the name of the building that has the meter you are setting up.
- ❑ Still on **MyPortfolio** tab, click the **Energy** tab, then click **Add A Meter**.



- ❑ In the **Get Started Setting Up Meters** section, answer the questions:
 1. Under **Sources of Your Property's Energy** check **Electric** and **purchased from the grid**.
 2. For **How Many Meters?** Enter **1**.
 3. Scroll down below the Water Usage section and click **Get Started!**

- ❑ On the next page, in the **Meter Name** column, click on the words: **Electric Grid Meter**.
 1. Replace the words: **Electric Grid Meter** with the **Virtual Meter Name** that SCL provided on the authorization form.
 2. Under **Units**, select **kWh (thousand kilowatt hours)**.
 3. Under **Date Meter Became Active**, type in: **01/01/2009**. (Leave "Inactive" date blank and "Enter as Delivery" un-checked.)

Tip: Copy the Virtual Meter name directly from the SCL authorization form and paste it to reduce typos.

1 Energy Meter for 1234 Broadway St (click table to edit)								
<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
<input type="checkbox"/>	1234_broadway_st_0	Electric - Grid		kWh (thousand)	09/25/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>

[Delete Selected Entries](#)
[Add Another Entry](#)

4. Click **Create Meters**.
 5. Click **Continue**.
- On **Select Energy Meters to Include in Metrics** page:
 1. Check all of the meters.
 2. Select: **These meter(s) account for the total energy consumption for this property.**
 3. At the bottom of the screen, click the **Apply Selections** button.

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for [85 Unit WS Building](#) so that we can provide you with the most accurate metrics possible.

Summary

2

Meters representing the total energy consumption for [85 Unit WS Building](#) (a single building).

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your

Energy Meters

Select all meters to be included in your Energy metrics. (Hint: All meters should be included unless they are [sub-meters](#).)

	Name Meter ID	Type
<input checked="" type="checkbox"/>	Natural Gas 25794037	Natural Gas
<input checked="" type="checkbox"/>	Electric Grid Meter 25794064	Electric - Grid

Total of 2 meter(s). Tell us what this represents:

These meter(s) account for the total energy consumption for [85 Unit WS Building](#) (a single building).

These meter(s) do not account for the total energy consumption for [85 Unit WS Building](#) (a single building).

4. Select Permission Levels for Other Web Services Providers

If you are using other automated data services (such as Seattle City Light), then you will be given the option to allow other utilities to view your PSE meter data.

- On the **Share Additional Meters with Web Services Provider** page, select “None” on the **Puget Sound Energy MyData** tab.
- Select **Apply Selections and Authorize Exchange**.

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Welcome TOSCANO: Account Settings | Contacts | Help | Sign Out

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

Share Additional Meters with Web Services Provider

You have successfully created additional meters for your property. We notice that your property is shared with companies that exchange data directly through Portfolio Manager web services. If you want these companies to be able to access/view your new meters, you must share these meters directly with them. If you do not wish to grant access to this meter, please select "None" as the permissions level and the meter(s) will not be shared at this time. To share in the future you will need to select "Edit Contact's Permissions" from the Sharing table on the Summary tab for your property.

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

Puget Sound Energy MyData

The following information is required by [Puget Sound Energy MyData](#) 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	Meter Number ¹
907_warron_ave_n_tosciano_01202017_ppi6793934148	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

¹ Meter Number: Example: 0123456789. The 9 or 10 character meter number for which you would like to receive consumption - usage data. This may be alphanumeric, and it may contain leading zeroes. - Between 5 and 10 Characters

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

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5. Share Property with Seattle City Light

- Go to the **Sharing Tab** and click **Share (or Edit Access to) a Property**.
 1. Select **One Property** and then choose the building to connect to SCL.
 2. Select contact, **SCL Portfolio Manager**
 3. Under **Choose Permissions**, select the second option: “Personalized Sharing & Exchange Data.”
 4. Click **Continue**.

1 Select Properties

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

One Property - Select Property -

2 Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

- City of Seattle Annual Reporting (SEATTLE.GOV)
- SCL Portfolio Manager (SCL_PORTFOLIO_MANAGER)**

? Help To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.

- On the next screen, select the **Exchange Data** button, which will pop-up the Access Permissions window.
 1. In the pop-up window, enter the **Premise ID number** found at the top of your **SCL Authorization Form**. You need to enter the Premise ID number in **TWO** places as shown below.

Select Access Permissions to 1234 Broadway St for SCL Portfolio Manager.

The following information is required by SCL Portfolio Manager in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

PremiseID: * Example: 1234567890

Parent Premise ID associated with the property and is provided by SCL Portfolio Manager or SCL Representative.; 1 - 10 Characters [More information](#)

Select the permission level below that you would like to grant SCL Portfolio Manager for each category.

Item	None	Read Only Access	Full Access	PremiseID ¹
Property Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
▼ All Meter Information				
▼ Energy Meters				
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>

2. IMPORTANT: Set the Access Permissions exactly as follows:

Property Information: **Read Only Access**

SCL Virtual Meter Name: **Full Access**

For any other meters listed: **None**

Goals, Improvements: **None**

Recognition: **None**

3. Scroll down. For **Share Forward**, select "No".

4. Scroll down the window and click **Apply Selections & Authorize Exchange**.

- This will open the Sharing window again. Click on the **Share Property(ies)** button to finish.
- You should see data in your Virtual Meter in about four hours.
Thereafter, SCL will update this meter monthly.