# Appendix E

# Submitting Seattle City Light Data Exchange Authorization

Fill out the SCL Consumption Request Form included in the last page of this appendix and email the form to SCL Portfolio Manager@seattle.gov

### How to Fill out the Form:

Select New Request for all new buildings OR

Select Add/Remove/Change Meters for buildings you've already submitted this form for that need to be either corrected or updated with new information (NOTE: You will select New Request if prior owner or management firm submitted the request form in the past and you are now benchmarking under a new Portfolio Manager Username Account).

Portfolio Manager Username: This is the Username you created to log in to Portfolio Manager account

Building Name: Name of the building that is listed in Portfolio Manager

**Primary Address:** Main address of the building

Alternate Address: Please include all other street addresses that are part of your property. These include all residents and commercial space addresses as well. Attach a separate Word Doc if the list is too long.

Recent Construction: Yes if it's within the last 3 years and No if it's older

Is there more than one electric utility account associated w/building? Select Yes if there are multiple SCL account holders from the building (for example, apartment or retail buildings with 2 or more SCL accounts). And select No if there is only 1 SCL account holder (example: commercial building with one 1 tenant).

Owner/Authorized Management Firm: Enter your contact information here. The email address you list here will be where SCL will send the Authorization Credentials form and Meter List to.

**Authorized Consultant:** Mark N/A unless you are hiring a third party consultant to benchmark the property for you. If yes, have them fill out this section.

Account Holder Signature: You will only need the Account Holder signature if you've answered "NO" for the question, "Is there more than one electric utility account associated w/building?" If you have multiple SCL account holders for the building, you can skip to Owner or Authorized Agent Signature Section.

Owner or Authorized Agent Signature: You can either have the Owner of the building sign the form OR select the Authorized Agent box and sign the form yourself. The person that will be benchmarking this property is considered the "Authorized Agent".

Once submitted, your request form will be processed within five business days. Look in your email for the Automated Benchmarking Authorization form (Word Doc) AND Meter List (Excel) from SCL. If you do not hear back within the timeframe, email Gwen at <a href="mailto:SCL\_Portfolio\_Manager@seattle.gov">SCL\_Portfolio\_Manager@seattle.gov</a> for your status update.

NOTE: Please wait to complete below steps until AFTER you receive your email attachments from SCL.

Once you have received your Automated Benchmarking Authorization form (Word Doc) AND Meter List (Excel) from SCL :

Confirm that your meter list is accurate. If you have 100 residential units and see less numbers of
meters listed on the Excel spreadsheet, that is an obvious indicator that some meters are
missing. Email Gwen at <u>SCL\_Portfolio\_Manager@seattle.gov</u> to get your meter list corrected.

	Α	В	С	D	E	F	G	Н		
1	Filtered b	y Premise	ID 3744506	912	12 SAMPLE METER LIST					
2										
3	Premise	Meter	Status	Service Ad	ddress					
4	40153643	446055	ACTIVE	1234 5TH /	AVE NE AP	Γ 101, SEAT	TLE, WA, 9	8105-6454		
5	7.1E+08	446022	ACTIVE	1234 5TH /	AVE NE AP	Γ 102, SEAT	TLE, WA, 9	8105-6454		
6	8.01E+08	445991	ACTIVE	1234 5TH /	AVE NE AP	Γ 103, SEAT	TLE, WA, 9	8105-6454		
7	1.39E+09	446058	ACTIVE	1234 5TH /	AVE NE AP	Γ 104, SEAT	TLE, WA, 9	8105-6454		
8	2.92E+09	446015	ACTIVE	1234 5TH	AVE NE AP	Γ 105, SEAT	TLE, WA, 9	8105-6454		
9										

2. Once your Meter List is accurate, log in to Portfolio Manager account with the Authorized Portfolio Manager Username listed on your Seattle City Light Authorization form.

### City of Seattle, Seattle City Light

Portfolio Manager Automated Benchmarking Authorization

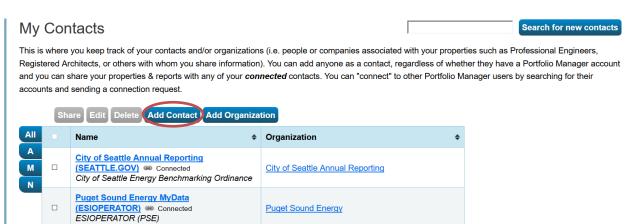


+						
	PART 1: Authorization Cre	edentials (Information provided by Seattle City Light)				
	Please read our Terms and Conditions:	http://seattle.gov/light/accounts/energyusage/docs/abs_tcs.pdf				
	Meters included in profile:	Verify the meters listed in the attachment are accurate. If you do not agree with the meter list or if there was no attachment, email scl_portfolio_manager@seattle.gov				
	Authorized Portfolio Manager Username:	USERNAME (SAMPLE)				
	Virtual Meter Name:	1234_5th_ave_ne_sampleapts_11092017ppi3744506912 (SAMPLE)				
	Parent Premise ID:	3744506912 (SAMPLE)				
	Parent Premise ID:	3744506912 (SAMPLE)				

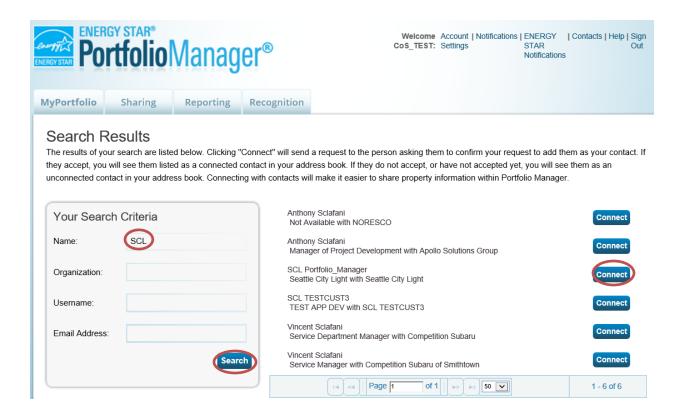
- " If you have not previously added SCL as a contact, you will need to add them:
  - 1. Click the contacts link in the upper right hand corner when you log in to Portfolio Manager.



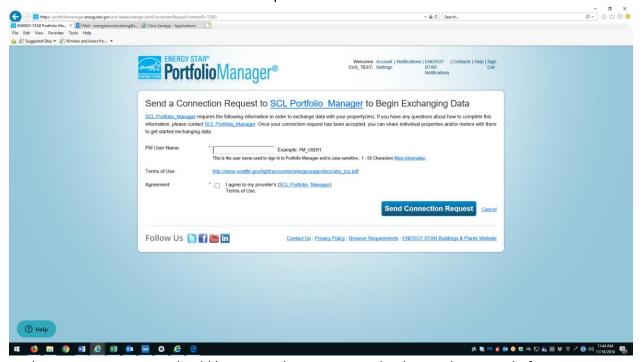
2. Click on Add Contact



- 3. Under Your Search Criteria, enter SCL as Name. Enter or click Search.
- 4. From the list of contacts, locate SCL Portfolio\_Manager.
- 5. Click the Connect button to the right of the name.

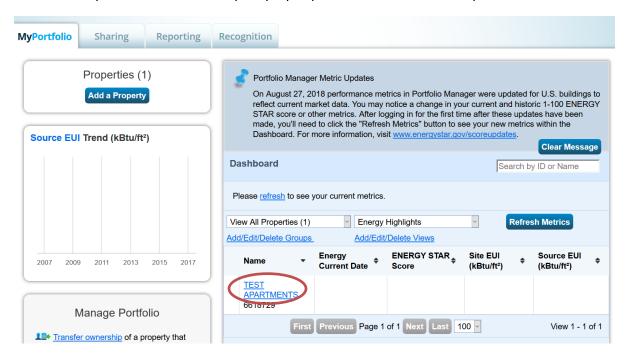


6. When prompted, enter your Portfolio Manager Username in all uppercase letters, check the Terms of Use and then Send Connection Request button.

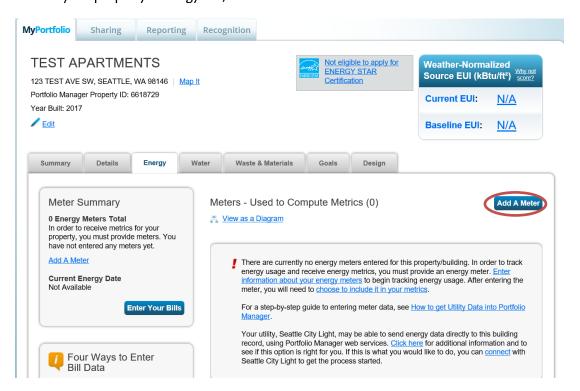


7. This connection request should be accepted in approximately 1 hour. Please wait before proceeding.

- 3. Connection Approval and Virtual Meter Setup
- " Log in to Portfolio Manager.
- -Under the MyPortfolio tab, click on your property name that is listed under your Dashboard.



"Go to your property's Energy tab, then click Add A Meter.



In the Get Started Setting Up Meters section, answer the questions:

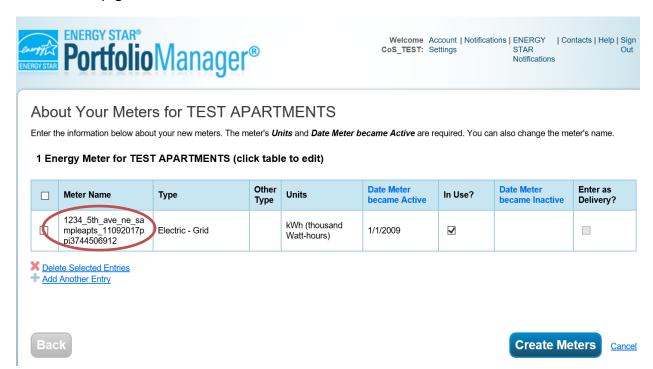
- 1. Under Sources of Your Property's Energy check Electric and purchased from the grid.
- 2. For How Many Meters? Enter 1.

□ Natural Gas

3. Scroll down below the Water Usage section and click Get Started!

#### Get Started Setting Up Meters for TEST APARTMENTS There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically. **Tracking Energy** Sources of Your Property's Energy What kind of energy do you want to track? Please select all that apply. To track your energy, create an energy meter for each source of energy from a ✓ Electric utility, a neighboring building, or an ✓ purchased from the grid onsite solar or wind panel. If you How Many Meters? 1 purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or generated onsite with my own solar panels chilled water), you only need a meter for generated onsite with my own wind turbines

" 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.

the fuel you purchased (e.g. gas), and

not for the fuel you produce.

### City of Seattle, Seattle City Light

Portfolio Manager Automated Benchmarking Authorization



#										
	PART 1: Authorization Credentials (Information provided 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 was no attachment, email scl_portfolio_manager@seattle.gov								
	Authorized Portfolio Manager Username:	USERNAME (SAMPLE)								
	Virtual Meter Name.	1234_5th_ave_ne_sampleapts_11092017ppi3744506912 (SAMPLE)								
	Parent Premise ID:	3744506912 (SAMPLE)								

- 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.)
- 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 Meters to Include in Metrics

Tell us which meters to include when calculating the metrics for TEST APARTMENTS so that we can provide you with the most accurate metrics possible.

# Meters representing the total energy consumption for TEST APARTMENTS (a single building).



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

### **Energy Meters**

Select all meters to be included in your metrics. (Hint: Most meters should be included unless they are <a href="mailto:sub-meters"><u>sub-meters.</u>)</a>

	Name Meter ID	Туре
<b>✓</b>	1234 5th ave ne sampleapts 11092017ppi37445 06912 49776541	Electric - Grid

Total of 1 meter(s). Tell us what this represents:

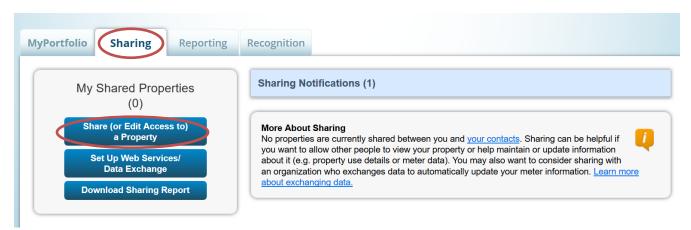
- \* 

  These meter(s) account for the total energy consumption for <u>TEST APARTMENTS</u> (a single building).
- These meter(s) do not account for the total energy consumption for <u>TEST APARTMENTS</u> (a single building).

- 4. Select Permission Levels for Other Web Services Providers
- >If you are using other automated data services (such as Puget Sound Energy), then you will be given the option to allow other utilities to view your Seattle City Light 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.

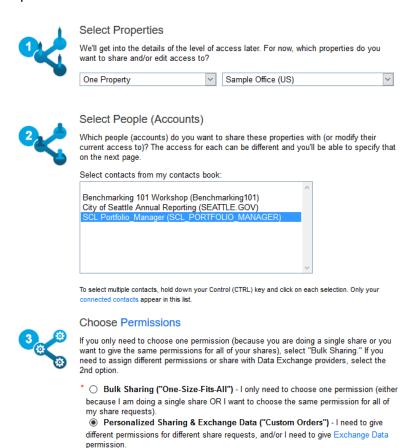


- 5. Share Property with Seattle City Light
- "Go to the Sharing Tab and click Share (or Edit Access to) a Property.



- 1. Select One Property and then choose the building to connect to SCL.
- 2. Select contact, Portfolio\_Manager, SCL.

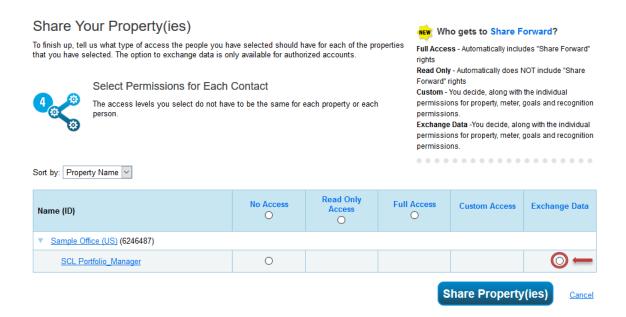
- 3. Under Choose Permissions, select the second option: "Personalized Sharing & Exchange Data."
- 4. Click Continue.



" On the next screen, select the Exchange Data button, which will pop-up the Access Permissions window

Continue

Cancel



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 Sample Office (US) 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 ho complete this information, please contact them directly.

PremiseID:

\$\frac{3744506912}{2} \text{Example: 1234567890} \text{Example: 1234567890}

Parent Premise ID associated with the property and is provided by SCL Portfolio Manager or SCL Representative.; 1 - 10 Characters Monager or SCL Representative.

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

Item	None	Read Only Access	Full Access	PremiseID1						
Property Information	0	•	0							
▼ All Meter Information	All Meter Information									
▼ Energy Meters										
1234_5th_ave_ne_sampleapts_11092017ppi3744506912	0	0	<b>•</b>	3744506912						

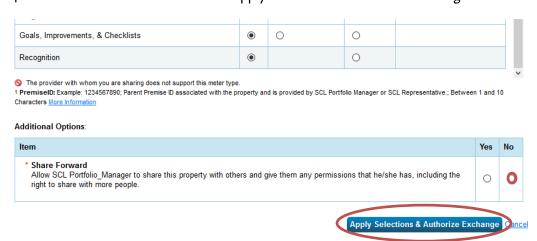
### 2.IMPORTANT: Set the Access Permissions exactly as follows:

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.

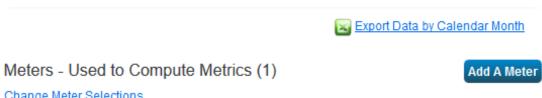


"This will open the Sharing window again. Click on the Share Property(ies) button to finish.



"You should see data in your Virtual Meter in about four hours. Thereafter, SCL will update this meter monthly

To verify SCL data in your Portfolio Manager account, log in to your Portfolio Manager account and go to your property's Energy tab. Scroll down and click on your SCL meter as shown below:



Change Meter Selections

Niew as a Diagram



Download Annual Totals by Meter

If you have January 1st - Dec 31st data from the reporting year, you have full data to report to the City of Seattle. (NOTE: You will see a 3-month lag with all SCL Automated Consumption Data.)

I	ı	I	ı	I	 1	
5/1/2017	5/31/2017	23,587.7	2,106.93			12/5/2018 SCL Portfolio Manager
6/1/2017	6/30/2017	22,994.08	2,056.12			12/5/2018 SCL Portfolio Manager
7/1/2017	7/31/2017	24,884.02	2,239.90			12/5/2018 SCL Portfolio Manager
8/1/2017	8/31/2017	24,655.42	2,208.97			12/5/2018 SCL Portfolio Manager
9/1/2017	9/30/2017	22,936.97	2,012.92			12/5/2018 SCL Portfolio Manager
10/1/2017	10/31/2017	24,925.37	2,179.30			12/5/2018 SCL Portfolio Manager
11/1/2017	11/30/2017	27,522.35	2,384.99			12/5/2018 SCL Portfolio Manager
12/1/2017	12/31/2017	29,100.35	2,563.06			12/5/2018 SCL Portfolio Manager
1/1/2018	1/31/2018	32,014.22	3,011.43			12/5/2018 SCL Portfolio Manager
2/1/2018	2/28/2018	28,905.62	2,730.40			12/5/2018 SCL Portfolio Manager
3/1/2018	3/31/2018	27,304.97	2,555.25			12/5/2018 SCL Portfolio Manager
4/1/2018	4/30/2018	25,773.05	2,410.27			12/5/2018 SCL Portfolio Manager
5/1/2018	5/31/2018	21,052.55	1,964.90			12/5/2018 SCL Portfolio Manager
6/1/2018	6/30/2018	20,464.22	1,911.50			12/5/2018 SCL Portfolio Manager
7/1/2018	7/31/2018	22,209.5	2,074.82			12/5/2018 SCL Portfolio Manager
8/1/2018	8/31/2018	22,492.37	2,091.22			12/5/2018 SCL Portfolio Manager
						40/5/0040

RETURN TO HOW TO GUIDE STEP 3B IF YOUR BUILDING HAS NATURAL GAS -IF NOT-PROCEED TO STEP 4 OF THE HOW TO GUIDE TO COMPLETE THE BENCHMARKING PROCESS

### City of Seattle, Seattle City Light

## Portfolio Manager Automated Benchmarking Consumption Request\*



### **Instructions**

- 1. Typing is preferred, so the information is legible.
- 2. Before filling out this form, setup your User Account in Portfolio Manager.

New Request

- 3. Do not setup your meter in Portfolio Manager. We will supply your meter information.
- 4. Read our Terms and Conditions: http://seattle.gov/light/accounts/energyusage/docs/abs\_tcs.pdf
- 5. You do not need the Account Holder signature, if there is more than one account holder in the building.

N	ew Reques	st 🗌		Add/Re	emov	e/Chai	nge N	lete	ers 🗌	]		
To be completed by l	Building C	owner or A	uthorized	d Property	Mana	ageme	ent Ag	gen	it:			
Portfolio Manager Username	(Carefully o	choose your L	Jserid. We s	strongly discou	ırage o	changes	in Use	erids	s, unle	ss a	bsolutely	necessary.)
Building Name			Prima	Primary Address							Zip	
Alternate Address(es)												
Recent Construction?	Yes 🗌 No 🔲			nore than one ount associat				es 0**	_ `	If No, Account Holder's signature required, below.)		
Additional Comments	List any ad	ditional inform	nation that w	vill help Seattle	o City	Liaht wit	h vour	roa	uoet			
Owner/Authorized Management Firm	List arry au	ullional illioni	iation that v	viii Heip Seatti	City	Ligiti wii	Tel	(	)	-	x	
Mailing Address			City				State	Э			Zip	
Email		ı										
Authorized Consultant?	N/A 🗌					Tel	(	)	-	X		
Mailing Address			City				State	Э			Zip	
Email											1	
Account Holder**  (Required, if there is only one electric utility account associated w/building.)	Building Ov	vner/Authorize Seattle harmle such data.	ed Agent. I a ess from an	ase the energy agree to relea y liability, clair ign	se and	I hold So	eattle (	City	Light a	e and	Date	
Owner  or Authorized Agent		Sign								Date		
EMAIL THIS FORM TO SCL PORTFOLIO MANAGER@SEATTLE.GOV OR FAX TO 206.287.5305												
New Req *Add/Rer	uests: move/Chang	ne Meters:		ow 5 business ow 5 business	•	•	•		hange	S.		
	<u>*NO1</u>	E: Actual dat	a changes v	von't occur un	til the	<u>monthly</u>	updat	<u>'e.</u>				