How to Enroll in Web Services

User Guide for setting up Automated Data Uploads with SMUD’s Web Services
This document is a reference guide for enrolling in Sacramento Municipal Utility District’s (SMUD) Web Services. For additional help, please refer to the resources available on SMUD’s EPA Portfolio Manager page, on SMUD’s Benchmarking help website, and in the Portfolio Manager Online Help library.

OVERVIEW

ENERGY STAR Portfolio Manager, an online service created by the Environmental Protection Agency (EPA), allows you to track the energy consumption of your facilities and compare them to similar buildings nationwide. Web Services makes it easier to use this tool by uploading meter data automatically to your Portfolio Manager account.

This guide will walk you through the process of enrolling in Web Services. The Frequently Asked Questions section will help you correct problems you encounter using Web Services. Find detailed answers for many more frequently asked questions on SMUD’s Benchmarking Help website at https://smudbenchmarkinghelp.com/.

Before getting started, you may want to locate a recent SMUD billing statement for your building. If you don’t have access to billing data for all meters at your site, SMUD can help.

TABLE OF CONTENTS

SECTION 1 | How to Enroll in SMUD’s Web Services | 3
SECTION 2 | Changing Web Services Authorizations | 14
SECTION 3 | Frequently Asked Questions | 20
SECTION 4 | Additional Resources | 22
Section 1 – How to Enroll in SMUD’s Web Services

Web Services is a free tool provided by SMUD that uploads energy usage data directly into your Portfolio Manager property record.

Before enrolling in SMUD’s Web Services, if possible:

- Add all the meters of interest to the property profile in Portfolio Manager. If you want SMUD to upload individual meter data, add one electric meter for each electric meter at the site. If you want SMUD to upload aggregated data (meters are grouped and summed by Location ID), add one electric meter for each Location ID at the site.
- Obtain a recent SMUD energy statement (recommended but not required).
- For individual meter data uploads, identify the Account Number and Location Number for each meter.
- For aggregated data uploads, identify one Meter Number per Location Number at the site.
- Delete any manually entered Portfolio Manager meter data, if having up to 24 months of historical meter data uploaded from SMUD is preferred. Web Services will not populate meter entries prior to the most recent existing data entry, so leaving existing meter data in a meter will effectively block older data from uploading. Existing data can be downloaded in spreadsheet form prior to deletion for safekeeping, if desired.

Tip: If you are missing some information, and can’t follow the above guidelines, SMUD can help. Reach out to us for support at benchmark@smud.org.

See the SMUD User Guide to Benchmarking posted on the SMUD’s Benchmarking Help website for guidance setting up energy meters in Portfolio Manager in accordance with your Web Services enrollment goals. Meter set ups are different for individual meter and aggregated data upload types.

Steps for enrolling in SMUD’s Web Services using Portfolio Manager.

1. Establish a Contact Connection with SMUD in Portfolio Manager. Wait until SMUD accepts your connection request (~24 hours).

2. Share both the property and its meters with SMUD in Portfolio Manager. SMUD will accept your share request and upload the data directly into your Portfolio Manager meter(s) within 2 business days.
Step 1 – Establish a Contact Connection with SMUD in Portfolio Manager

To set up Web Services, the first step is to connect with SMUD as a Portfolio Manager contact. Click on the Contacts link found on the top right corner of every page in Portfolio Manager.

Clicking Contacts opens your My Contacts list.

Search for SMUD by entering “Sacramento Municipal Utility District” in the “Search for new contacts” field. Click “Search for new contacts”.

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**My Contacts**

This is where you keep track of your contacts and/or organizations (i.e., people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your connected contacts. You can “connect” to other Portfolio Manager users by searching for their accounts and sending a connection request.
When the page refreshes, “Sacramento Municipal Utility District SMUD Web Services with smud-electric” will appear as a choice on the right of the page. Click “Connect”.

Indicate whether you are benchmarking for a State of California Government Agency by inserting Y or N. (If benchmarking a building currently occupied by a State of California Government Agency, select Y here.) Next, read and agree to SMUD’s Terms of Use. Finally, click “Send Connection Request”.

Welcome BEFM, HELP: Account Settings | Notifications | Contacts | Help | Sign Out

Send a Connection Request to Sacramento Municipal Utility District SMUD to Begin Exchanging Data

Sacramento Municipal Utility District SMUD requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact Sacramento Municipal Utility District SMUD. Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Are you Benchmarking a building for a State of CA Government Agency? Reply Y or N

Terms of Use:

I am the owner or owner's agent or operator ("Owner") for the above referenced covered building. I wish to participate in the U.S. Environmental Protection Agency's ("EPA") national energy performance benchmarking program, an element of the ENERGY STAR program. I am or have obtained consent from, the above identified commercial customer / customer of record ("Customer") of the Sacramento Municipal Utility District ("Utility"), to have the Utility provide aggregate energy usage data or, where applicable, Customer usage information to the Owner's account on the EPA's ENERGY STAR Portfolio Manager. I understand that the EPA requires information about Owner's facilities (which Owner may be required to provide directly to the EPA), and also Customer's monthly utility billing usage data and other data as may be required in order to calculate the Customer's benchmarking score and other energy information that will help Owner track the energy usage and efficiency of its facilities. I understand that it is convenient and desirable for Utility automatically release such data on Customer's behalf directly to the EPA, so that Customer's benchmarking information will remain up-to-date. I also understand, on behalf of Customer, that it is desirable for Utility to have access to Customer's benchmarking information, so that Utility may better

Agreement:

I agree to my provider's Sacramento Municipal Utility District SMUD Terms of Use.

Send Connection Request

Follow Us
A green banner confirms your Contact Connection request was sent to SMUD.

Note: You are not yet Contact Connected to SMUD. You will receive a connection notification in Portfolio Manager when your request to connect with SMUD has been accepted. Look for Notifications in the top toolbar, next to Contacts. This process typically takes less than 24 hours.

After you have received a notification that SMUD has accepted your connection request, the next step is to share your property and meter(s) with SMUD.

Step 2 – Share Both the Property and its Meter(s) with SMUD in Portfolio Manager

To get started, click the Sharing tab.

Once on the Sharing tab, click on “Set Up Web Services / Data Exchange” as shown.
First, select Sacramento Municipal Utility District SMUD (SMUD Electric) as the Web Services Provider (Account).

Next, for Select Properties, choose One Property. Once you make that selection, a new drop-down menu will appear at right to help you choose the specific building you would like to share with SMUD. Make your selection.

Third, Choose Permissions. For SMUD Web Services, select “I want to provide different levels of access…”.

Click Set Permissions to move on to the next step.

On the next page, click the small circle under Exchange Data, found at right on the grey row that reads Sacramento Municipal Utility District SMUD.
This action opens a pop-up box.

For Property Information select Full Access.

Tip: This box has three grey scroll bars. Scroll both side to side and up and down to fully review the entire pop up box.

For Electric Meters supplied by SMUD, choose Full Access.
Meters not supplied by SMUD are greyed out, and you can’t make a permissions selection on those rows. See the Natural Gas meter below for an example of how a non-SMUD meter will appear.

For Electric Meters supplied by SMUD, fill out columns 1, 2, and 3 using one of the two options provided on the following page, to request either individual meter data, or aggregated data, according to your preference.

Tip: Make a mental note of the pop-up box column headings in blue, because scrolling down causes these headings to disappear. If you have multiple SMUD meters to work on, noting the column headings before continuing will be helpful.

Tip: If you want aggregated data, but are unsure of how many aggregated data meters to create in Portfolio Manager because you don’t know how many SMUD Location Numbers are associated with your property, see the Frequently Asked Questions section at the end of this document. The steps you should use to request this information from SMUD are provided in the FAQs.
Option 1 – Individual Meter Data. Establish a continuous monthly flow of single meter data from SMUD into each individual meter in Portfolio Manager, as well as a one-time transfer of up to 24 months of historical data, as follows. For each SMUD Meter: Insert “N” in column 1, indicating that you are not requesting a One-time Aggregated Energy Usage Data transfer. Insert the Account Number in column 2. Insert the Location Number in column 3. Be sure to select Full Access at left. Repeat for additional SMUD meters.

<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>Account #</td>
<td>Location #</td>
</tr>
</tbody>
</table>

Option 2 – Aggregated Meter Data. Establish a one-time transfer of up to 24 months of data summed per Location Number into dedicated aggregated meter(s) in Portfolio Manager. Insert “Y” into column 1, indicating that you are requesting a One-time Aggregated Energy Usage Data transfer. Insert a Meter Number into column 2. Insert this same Meter Number into column 3. Repeat this process in additional rows, if needed, using a Meter Number associated with the other Location Number(s) at the site. Be sure to select Full Access at left.

<table>
<thead>
<tr>
<th>Column 1</th>
<th>Column 2</th>
<th>Column 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Meter #</td>
<td>Meter #</td>
</tr>
</tbody>
</table>
Continue filling out the required fields in the pop-up box.

Insert a permissions level for Goals, Improvements, & Checklists, selecting None, Read Only, or Full. Select a permission level for Recognition as well, selecting either None or Full. Note: These two rows are requesting your consent for SMUD to count your building in tallies, on an anonymous basis. For example, a count of the number of ENERGY STAR labeled buildings in the SMUD territory.

Scroll down further and select No for Share Forward.

Click Apply Selections & Authorize Exchange to close the pop-up box.

Finally, to submit your building and meter share, you must click Share Properties.
A green banner will appear confirming your successful site and meter share with SMUD.

SMUD will transmit the requested billing data directly into your meter or meters in Portfolio Manager within 2 business days.

Your Web Services enrollment is complete!

**SMUD Automated Data Upload Facts**

The amount of data transferred depends on the specifics of your request.

**Aggregated Data**: Up to 24 months of historical calendarized* data will be uploaded on a one-time basis. Note: Accounts on Campus Billing can only get aggregated data.

**Individual Meter Data**: Up to 24 months of historical data will be uploaded, and monthly uploads will be provided going forward.

Both scenarios specify “up to 24 months” for two reasons:

1. If the account has been in service for less than 24 months, SMUD will provide only the consumption data on record for the account.
2. If meter entries are already present in your Portfolio Manager meter, SMUD will not overwrite this information. SMUD will only provide data going forward, beyond the most recent existing entry. If you prefer to receive a full 24 months of data directly from SMUD, delete any meter entries in your meter within this date range. You can download this meter data to a spreadsheet prior to deletion, if desired.

*Calendarized Data has been mathematically reallocated from the original meter billing schedule into uniform periods which run from the first day of a month to the last day of a month.
Successful Historical Data Upload

Here is an example of a historical aggregated data upload in Portfolio Manager. To view, go to the Energy Tab, and click on the meter name.
Section 2 – Changing Web Services Settings: Sharing Additional Properties and Meters, Re-setting Meter Shares using Unshare/Re-share, and Changing Permissions

Once you are connected with SMUD at the contact level in Portfolio Manager, you can then share additional properties and meters with SMUD, re-share a meter with SMUD, or adjust permissions settings, all in just a few easy steps.

Sharing Additional Properties and Meters with SMUD

Start on the My Portfolio Tab. Click on the building name of interest. This action will take you to the Summary tab for that property. In the lower right corner of the Summary tab, in the Sharing this Property section, click Share.
Sharing Additional Properties and Meters with SMUD (continued)

Clicking the Share button opens this page.
The selections in 1 are already set for the building of interest.
In 2, select Sacramento Municipal Utility District.
In 3, choose Personalized Sharing & Exchange Data.
Then click Continue.
Sharing Additional Properties and Meters with SMUD (continued)

Fill out the pop-up box as illustrated on page 10 of this Guide, then click Share Properties, to connect the property and its meters with SMUD’s Web Services.

Note: In cases where a property and some meters are already shared with SMUD, but you need to share additional meters, you should go through the unshare/reshare sequence, described next. You will add in the meters you missed the first time when resharing the site and meters with SMUD.

Re-setting Meter Shares using Unshare/Re-share

Certain scenarios can result in an interruption in the regular flow of meter data from SMUD, such as changes in customer account information. Or, in other cases, the data flow from SMUD was established correctly, but only for some of the SMUD meters at the site. To resolve these issues, removing SMUD’s access to the site and meters, then setting up a fresh share is recommended. This sequence is referred to as Unshare/Re-share. Before you get started, obtain a recent SMUD energy billing statement.

UNSHARE - From the My Portfolio Tab, click on the building name of interest. This action takes you to the Summary Tab for the property. Look for the Sharing this Property section at the lower right of the Summary tab. This section lists all the accounts with access to this property. Locate SMUD in this list. In the “I want to…” Action dropdown at right of Sacramento Municipal Utility District SMUD (SMUD-ELECTRIC), select Remove Contact’s Access to Property, as shown. A pop-up will prompt you to confirm your request to remove access. Click Continue.

After the screen refreshes, SMUD will no longer appear in the list of accounts with access to the site.
Re-setting Meter Shares using Unshare/Re-share (continued)

RE-SHARE - In this same section, “Sharing this Property”, at lower right on the Summary Tab, click the blue Share box.

Clicking the Share button opens a new page.

The selections in 1 are already set for the building of interest.

In 2, select Sacramento Municipal Utility District SMUD (SMUD-ELECTRIC).

In 3, choose Personalized Sharing & Exchange Data.

Then click Continue.

On the next page, click the Exchange Data button, and fill out the pop-up box as illustrated on page 10 of this Guide. Finally, click Share Properties, to connect the property and all its meters with SMUD’s Web Services.

Data should transfer over from SMUD within two business days.
Changing permissions on an existing site/meter share with SMUD

From the Summary tab for the property profile you want to adjust, go to the “Sharing this Property” section found in the lower right corner of the page. Choose “Edit Contact’s Permissions” in the “I want to…” Action drop down to the right of Sacramento Municipal Utility District SMUD (SMUD-ELECTRIC).

On the next page, click the blue word Edit, NOT the blue button.
Changing permissions on an existing site/meter share with SMUD (continued)

Clicking on the blue word “Edit” under the heading Exchange Data will cause a pop-up box to open. Remove or Add access to a meter by adjusting permissions as shown.

To Remove Permissions: Set permissions from Full Access to None.

To Add Permissions: Set Permissions from None to Full Access.

Then, save your changes by first scrolling down to select “Apply Selections & Authorize Exchange” which closes the pop-up box. Lastly, click on “Edit Permissions” to finalize your changes.
Section 3 – Frequently Asked Questions

Q - I own or manage a multi-tenant building. How do I benchmark my building when some SMUD accounts aren’t in my name?

A – Most building owners or property managers have access to the meters at their site. Refer to the instructions for requesting Aggregated data on page 10 of this Guide. You will only need one Meter Number for each Location Number at the site. Buildings with multiple addresses often have more than one Location Number. SMUD will validate the meter number, locate all other meters at the same address/Location Number, and upload aggregated data for the building, all while maintaining your individual tenant’s privacy. Note: If the building has two separate addresses (such as a building located on a corner), some meters are associated with the second address. To obtain whole building data, you must provide one Meter Number for each address/Location Number associated you’re your property when sharing your meters with SMUD. To do that, create one meter in Portfolio Manager for each Location Number, and use a Meter Number associated with that Location Number when submitting your meter share requests to SMUD.

Q – I own or manage a multi-tenant building. I have access to the meter numbers at my property, but I don’t know how many Location Numbers are associated with my site. How many aggregated data meters should I set up in Portfolio Manager?

A – To find out how many Location Numbers are associated with your building, use the following procedure to request help from SMUD. Write to benchmark@smud.org and provide a list of addresses at the site. For every address associated with your property, please specify a full postal address, including suite numbers or apartment numbers and zip. SMUD will provide you with one Meter Number per Location ID so that you may request aggregated data properly.

Q - Where can I find the Account Number, Service Agreement ID and Meter ID for my meters?

A1 - For SMUD Customers: Refer to your monthly energy statement. A sample billing statement is provided below.
Q - How do I set up my meters for aggregated vs individual meter data?

A - Individual Meter Data – If you set up Web Services using this option, you should create the same number of electric meters in Portfolio Manager as there are physical electric meters at the property. SMUD will transfer over the billing data into these meters on an individual basis, meter by meter. The energy consumption and cost data added to Portfolio Manager will match the energy use information you see on your billing statements from SMUD for each meter at the site. When you first connect to SMUD using this Web Services option, you will receive up to 24 months of historical meter data. Then, going forward, your Portfolio Manager meters will get data every month from SMUD. (Note – this option is not available for those SMUD customers on Campus Billing.)

Aggregated Data – If you set up Web Services using this option, you should create one meter in Portfolio Manager for each address/Location Number at the site. SMUD will aggregate the monthly energy consumption for all electric meters at the site address and import the summed energy and cost data into Portfolio Manager. In cases with only one Location Number, this single Portfolio Manager meter will contain energy and cost data for the whole building. Sites with more than one address can have more than one Location Number. In that case, each Location Number is associated with a subset of the physical meters at the site. You should create one meter in Portfolio Manager for each Location Number at the site, and share each of these meters with SMUD in order to request Whole Building Data for your site. See the FAQs at the end of this document for more information.

Customers opting to receive Aggregated Data will receive a one-time transmission of up to 24 months of data from SMUD. No monthly updates can be provided. Instead, customers need to request a new batch of aggregated data periodically.

Q - My account is set up on SMUD’s Campus Billing. I went through the steps to request individual meter data, but nothing happened. Why am I not receiving my data?
For customers on Campus Billing, SMUD can only upload the aggregated energy usage data that appears on your bill. However, a custom solution may be available to those Campus-billed customers who require energy consumption data by individual meter in Portfolio Manager to fulfill state reporting requirements. Please contact SMUD for details.

To access answers to many more Frequently Asked Questions, visit https://smudbenchmarkinghelp.com/pages/web-services-faqs

Section 4 – Additional Resources

How can I improve my ENERGY STAR score?

SMUD wants to help you save energy and improve your score! To find out more about the many programs that can help you save energy and money, check out:


Where can I get more help with Benchmarking and Web Services questions?

- Visit this SMUD-sponsored website to find helpful hints and troubleshooting tips to help you benchmark your building and connect with Web Services: https://smudbenchmarkinghelp.com/
- ENERGY STAR Portfolio Manager offers extensive help resources to assist users. Explore resources designed to empower you to find solutions on your own.
- ENERGY STAR encourages users to explore the Portfolio Manager Frequently Asked Questions (FAQs) archive here: https://portfoliomanager.zendesk.com/hc/en-us.
- You can contact SMUD at Benchmark@SMUD.org or (916) 732-7399.

Helpful Websites:

ENERGY STAR Portfolio Manager Login page: www.energystar.gov/portfoliomanager
California Energy Commission: http://www.energy.ca.gov/benchmarking/

To keep up to date about the CA Benchmarking Mandate via email, subscribe to the "Benchmarking" list serve by completing the subscription box found on the right of this webpage.

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