Xcel Energy®

ENERGY BENCHMARKING SERVICES

USER GUIDE

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CONNECTING TO OUR ENERGY BENCHMARKING SERVICE

Our Energy Benchmarking service gives you access to a direct feed of whole-building energy usage data from our metered data repository right to your ENERGY STAR® Portfolio Manager® account. If you haven't already, set up a Portfolio Manager account following Steps 1 through 3. If you're already set up in Portfolio Manager, skip down to Step 4.

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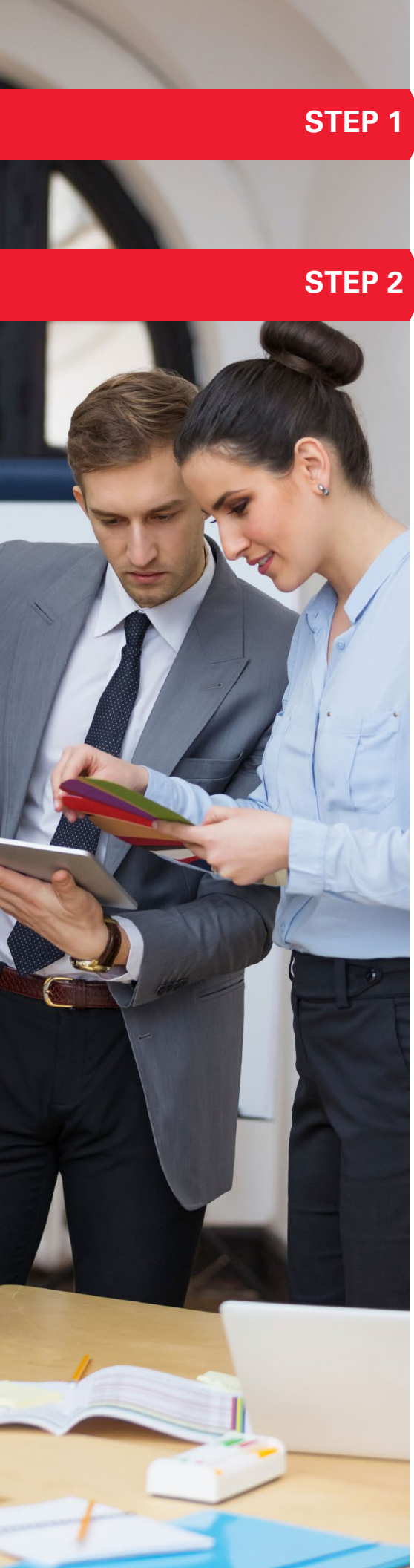
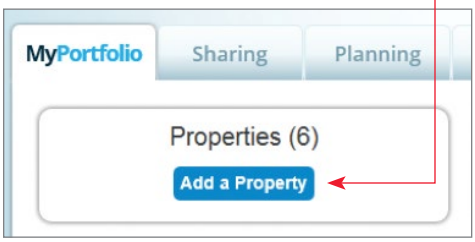


STEP 1 CREATE AN ACCOUNT IN PORTFOLIO MANAGER

Portfolio Manager website: **https://portfoliomanager.energystar.gov/pm/**

STEP 2 CREATE A PROPERTY IN PORTFOLIO MANAGER

1. Click Add a Property.



2. Enter general property characteristics.

3. Click on Get Started!

4. Enter property information.

5. Click Continue.

6. Enter values or leave blank for now (optional).

7. Click on Add Property.

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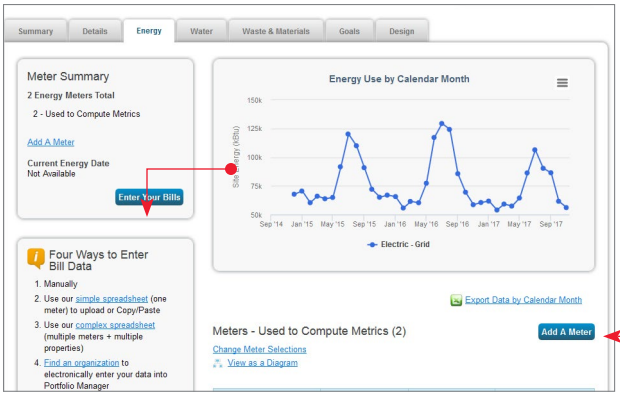
STEP 3 CREATE METERS IN PORTFOLIO MANAGER

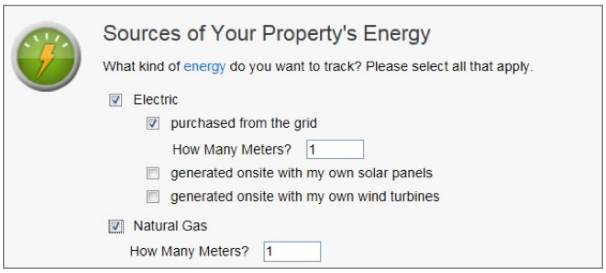
Once you have created your property in Portfolio Manager, you have the ability to create a virtual meter. Xcel Energy requires you to create one virtual meter for each utility type Xcel Energy serves.

Xcel Energy's Energy Benchmarking team will identify premises, accounts and physical meters on the property. The aggregated whole building energy data will then be uploaded into the meter you created for each energy type.

1. Click on the Energy tab. Once you are in this tab select Add A Meter.



2. Select all energy sources for your property.



3. Click on Get Started!

Note that Xcel Energy only supports the transfer of electricity purchased from the grid and natural gas at this time.

Gas transportation customers
If you receive your natural gas from a third-party provider, we are not currently able to transfer this data to Portfolio Manager for you. Please work directly with your third-party provider in order to access this information.

District steam and chilled water customers
If you receive district steam and chilled water, we are not currently able to transfer this data to Portfolio Manager for you. Please work directly with your district steam and chilled water provider to access this information.

*for Xcel Energy district steam and chilled water customers, configure your meters in Portfolio Manager as follows:

District service meter type units

Steam district steam kLbs. (thousand pounds)

Chilled water district chilled water from an electric-driven chiller ton hours

Onsite solar or wind generation customers
For customers with a solar photovoltaic (PV) system or wind turbine, Xcel Energy currently is not able to transfer the electricity generation data to Portfolio Manager for you. Please refer to your Xcel Energy billing statements to access this information. Note that Xcel Energy will transfer the gross electricity provided to the site from the grid under the electric grid meter in Portfolio Manager. You will need to create an additional electric solar meter or electric wind meter for the onsite generation system and enter the production data for that system with that meter. More information can be found at https://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-technical-reference-green-power

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4. Enter fields for meters.

   NOTE: To set up meters, you need to enter units and the date when the meter became active. Enter values in these fields by clicking in the black space under that field heading.

   Xcel Energy will provide natural gas consumption data in "therms" and electric data in "kWh." **It is very important that you use these measurement units when setting up your meters in Portfolio Manager.**

2 Energy Meters for Ren Box Test (click table to edit)

	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
☐	Natural Gas	Natural Gas		therms	1/1/2013	☑		☐
☐	Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	1/1/2013	☑		☐

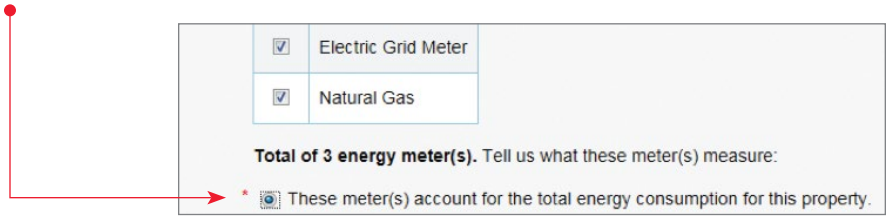
5. Click on Create Meters.

Create Meters

6. Skip usage entries, and click on Continue.

Continue

7. Select These meter(s) account for the total energy consumption for this property.



8. Click on Apply Selections.

Apply Selections

Congratulations, you've successfully set up your property and meters in Portfolio Manager. Now you're ready to connect to our benchmarking service.

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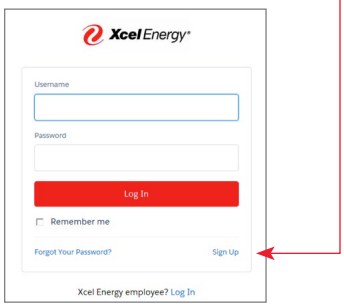
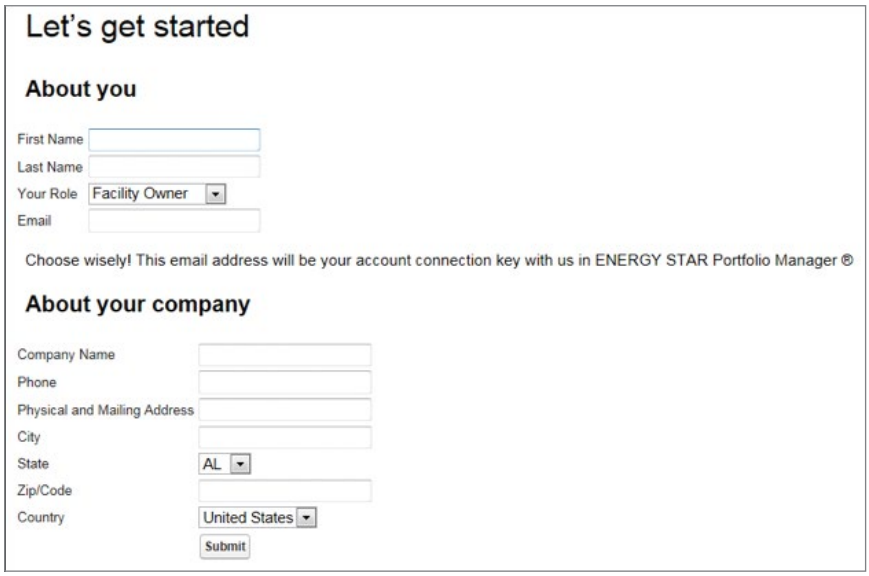
STEP 4 SET UP AN ACCOUNT IN THE XCEL ENERGY BENCHMARKING PORTAL

Xcel Energy Benchmarking portal: **https://xcelenergy.force.com/benchmarking**

1. Click on Sign Up.



2. Enter your information. Make sure to use the same email as the one you used in Portfolio Manager®.



Once you have clicked Submit, you will receive an email from **noreply@benchmarking.com** indicating you need to log in and change your password.

3. Click on the e-mail link you received from Xcel Energy and log in to the portal.

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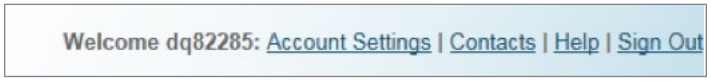
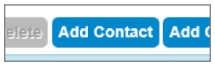
STEP 5 BACK IN PORTFOLIO MANAGER, CONNECT YOUR ACCOUNT WITH XCEL ENERGY

1. In Portfolio Manager, click on Contacts.



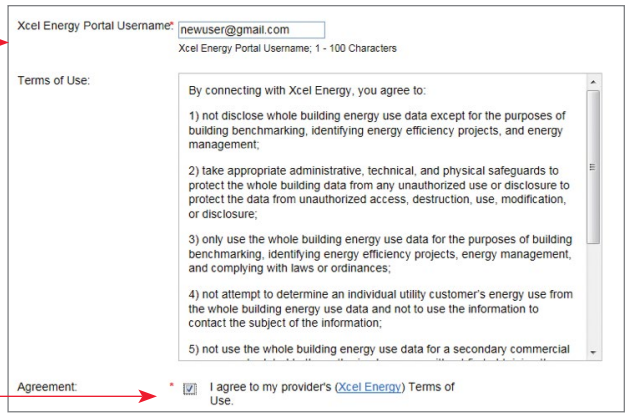
2. Click on Add Contact.



3. Under contact username, type: **XCELENERGYWEBSERVICES** and click on Search.

4. When the contact shows up, click on Connect.

5. Type in your log-in email you set up for the Xcel Energy Benchmarking portal. (You must use the same email address used to create your account in Step 4, on page 6 of this user guide.) Then agree to Terms of Use by checking the box.



6. Click on Send Connection Request.

7. Xcel Energy will notify you via email when your account connection request has been received and connected. **Allow 30 minutes.**

8. When the email arrives, log back in to your Portfolio Manager account.

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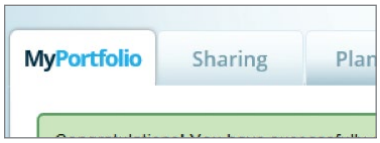
STEP 6 SHARE YOUR PROPERTY AND METERS WITH XCEL ENERGY

1. Click on the Sharing tab.



2. Click on Share (or Edit Access to) a Property.

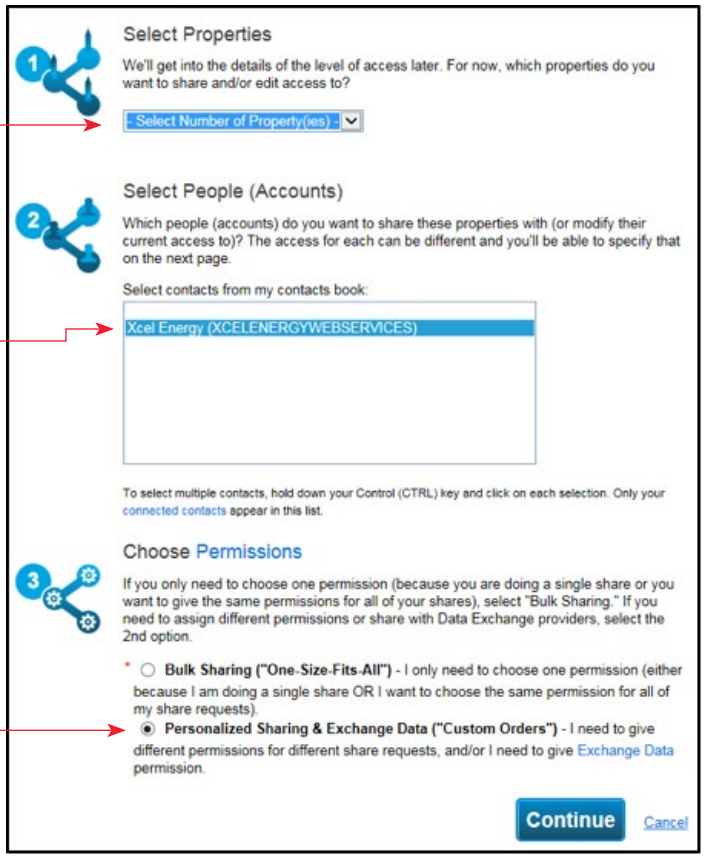
3. Select the properties that you would like to share.

4. Select people: Indicate Xcel Energy.

5. Choose permissions – Select the button Personalized Sharing and Exchange Data.

6. Click on Continue.

7. Select Exchange Data.



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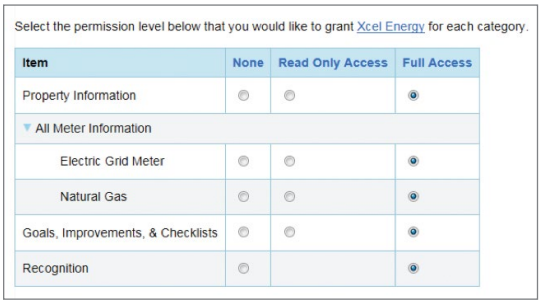
8. Give full access to property information as well as all Xcel Energy delivered fuel meters**

If you do not share with full access, Xcel Energy will not be able to update your property.



9. Make a selection regarding "Share forward."

(This gives Xcel Energy permission to share the property with others). If you're participating in an Xcel Energy program or plan to at some point in the future, this may be beneficial, but is not required.

10. Click on Apply Selections and Authorize Exchange.

11. Scroll down, and click on Share Property(ies).

12. Verify Sharing Requests have been sent.

Your sharing notifications will automatically appear in the Sharing Notifications section of the Sharing Tab under your Portfolio Manager account.

13. Xcel Energy retrieves connection requests.

When Xcel Energy has retrieved the share requests, they will be automatically accepted and an email will be sent to you. **Allow 30 minutes.** If your requests were declined for any reason, go back to Step 6 and ensure that the appropriate permission levels have been set for both the Property and Meters.

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STEP 7 BACK IN PORTFOLIO MANAGER, CONNECT YOUR ACCOUNT WITH XCEL ENERGY

We require that if anyone other than the building owner is requesting data on the building owner's behalf, that requester needs to obtain authorization from the building owner before proceeding. If you are the building owner, this step will not require any action from you. If you are not, this authorization can be completed using the customer energy usage data release forms found at the following link: xcelenergy.com/DataConsent

Use the following instructions when completing the consent form:

1) Specify your (the third party's) contact information, including identifying a contact person who the customer may contact with questions related to the data release request.

2) Describe the purpose(s) of the proposed use of customer energy usage data. Be sure to include Energy Benchmarking in your description of the purpose.

3) Provide the consent form to the customer of record and have the customer enter their account number, service address and name in the customer section of the consent form, and sign and date the form.

4) Submit the completed release request consent form to Xcel Energy, by sending an email to datarequest@xcelenergy.com and copying benchmarking@xcelenergy.com. Invalid or incomplete forms will be returned, and their request for information release will not be honored.

STEP 8 XCEL ENERGY WILL COMPILE YOUR TENANT LIST

This may take up to five business days, depending on the complexity of the building. We will send you an e-mail if we get stuck. No action is required of you at this stage.

STEP 9 TENANT TO METER MATCHING

We will make an initial attempt to match tenants to the meters you shared in Step 3. If we have any questions, we'll reach out to you.

The system will analyze the configuration to see if individual customer consent forms are required. At this point, you will receive an email from us indicating one of the following:

a. Individual tenant consent is required (Step 10)

b. Consumption data was successfully published to your Portfolio Manager account (Step 11)

If you need to adjust the tenant list for any reason, create a task for Xcel Energy within the Benchmarking Portal.

a. Scroll down to open activities and click on New Task

b. Fill out the form, click on Send.

We will contact you if we have any additional questions.

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STEP 10 WORK THROUGH CONSENT PROCESS

Note that if you chose option 1 when setting up your meters, this step may not apply to you. Depending on the number of tenants in your building, you may require consent from individual tenants.

1. Receive notification from Xcel Energy telling you that consent forms are required from one or more tenants.

1. Click on the link embedded in the notification email to download a copy of the customer consent form.

2. Complete the consent form with the required tenants according to the directions in Step 7.

3. Email consent form to benchmarking@xcelenergy.com

2. Xcel Energy will validate the consent form and notify you if more information is needed.

STEP 11 INITIAL UPLOAD

1. Property status should be set to "Ready for Processing."

Xcel Energy will begin processing your property. If additional questions arise, we will contact you. But if not, you should see 36 months of energy data populated to your meters in Portfolio Manager within two business days.

2. Data is automatically uploaded into Portfolio Manager.

Monthly Entries

Display Year(s): Show All Years

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost ($)	Estimation	Green Power	Last Updated
	7/1/2012	7/31/2012	585,882.83				12/6/2015 Xcel Energy
	8/1/2012	8/31/2012	900,432.41				12/6/2015 Xcel Energy
	9/1/2012	9/30/2012	833,855.09				12/6/2015 Xcel Energy
	10/1/2012	10/31/2012	1,317,613.65				12/6/2015 Xcel Energy
	11/1/2012	11/30/2012	1,377,222.37				12/6/2015 Xcel Energy
	12/1/2012	12/31/2012	1,661,248.03				12/6/2015 Xcel Energy

STEP 12 ONGOING PROCESSING

After a month has passed, ongoing processing will display new or updated usage totals.

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