

A woman wearing a blue hard hat and an orange safety vest over a blue and white striped shirt is looking down at a tablet computer. The background is a blurred industrial setting.

ENERGY BENCHMARKING SERVICES

USER GUIDE



TABLE OF CONTENTS

- Step 1: **Create an account in Portfolio Manager®**
- Step 2: **Create a property in Portfolio Manager**
- Step 3: **Create meters in Portfolio Manager**
- Step 4: **Set up account in the Xcel Energy Benchmarking Portal**
- Step 5: **Back in Portfolio Manager, connect your account with Xcel Energy**
- Step 6: **Share your property and meters with Xcel Energy**
- Step 7: **Xcel Energy will confirm your relationship with the building owner**
- Step 8: **Xcel Energy will compile your tenant list**
- Step 9: **Tenant to meter matching**
- Step 10: **Work through consent process**
- Step 11: **Initial upload**
- Step 12: **Ongoing processing**

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.



[Back to contents](#)

STEP 1

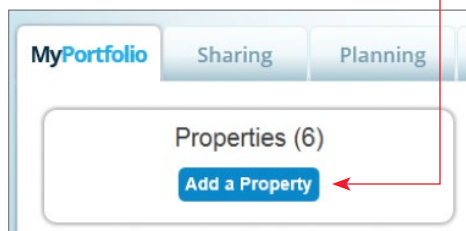
CREATE AN ACCOUNT IN PORTFOLIO MANAGER

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!**

Get Started!

4. Enter property information.

5. Click **Continue**.

Continue

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

7. Click on **Add Property**.

Add Property

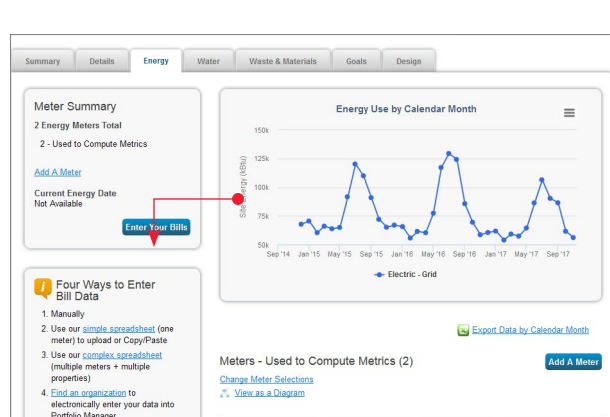
STEP 3

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!**

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>

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)								
<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"/>	Natural Gas	Natural Gas		therms	1/1/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	1/1/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>

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.](#)

☒ Electric Grid Meter

☒ Natural Gas

Total of 3 energy meter(s). Tell us what these meter(s) measure:

☒ 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.

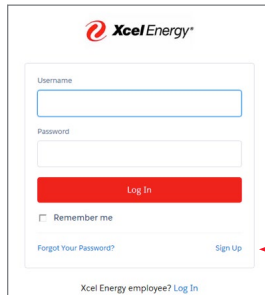
CONNECTING TO OUR ENERGY BENCHMARKING SERVICE

STEP 4

SET UP AN ACCOUNT IN THE XCEL ENERGY BENCHMARKING PORTAL

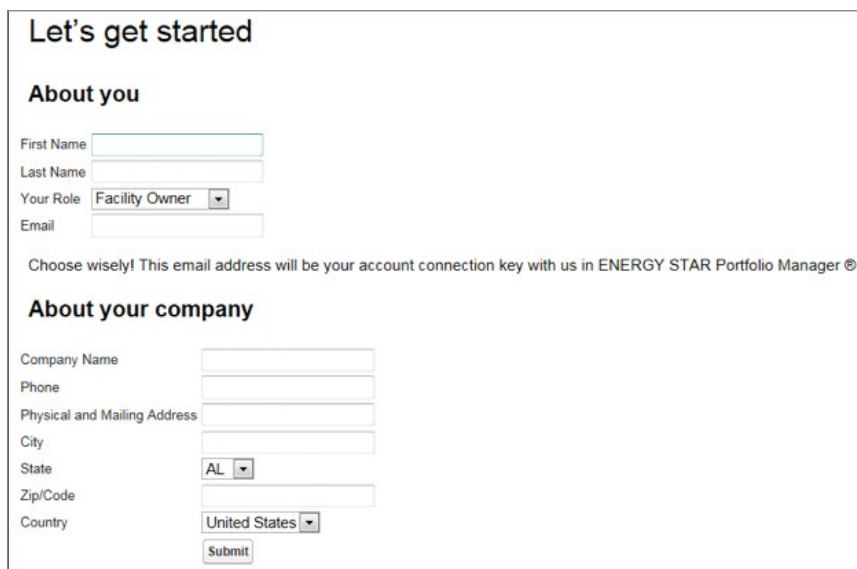
Xcel Energy Benchmarking portal: <https://xcelenergy.force.com/benchmarking>

1. Click on **Sign Up**.



The screenshot shows the Xcel Energy Benchmarking portal login/sign-up page. It features a login form with fields for Username and Password, a red 'Log In' button, a 'Remember me' checkbox, and a 'Forgot Your Password?' link. A 'Sign Up' link is located at the bottom right of the form. A red arrow points from the 'Sign Up' link in the instruction above to the 'Sign Up' link on the page.

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



The screenshot shows the 'Let's get started' registration form. It is divided into two sections: 'About you' and 'About your company'. The 'About you' section includes fields for First Name, Last Name, Your Role (a dropdown menu with 'Facility Owner' selected), and Email. Below these fields is a note: 'Choose wisely! This email address will be your account connection key with us in ENERGY STAR Portfolio Manager®'. The 'About your company' section includes fields for Company Name, Phone, Physical and Mailing Address, City, State (a dropdown menu with 'AL' selected), Zip/Code, and Country (a dropdown menu with 'United States' selected). A 'Submit' button is located at the bottom of the form.

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

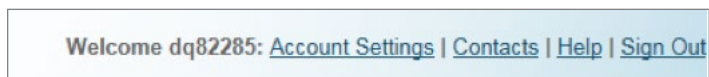
3. Click on the e-mail link you received from Xcel Energy and log in to the portal.



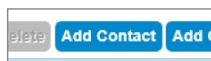
STEP 5

BACK IN PORTFOLIO MANAGER, CONNECT YOUR ACCOUNT WITH XCEL ENERGY

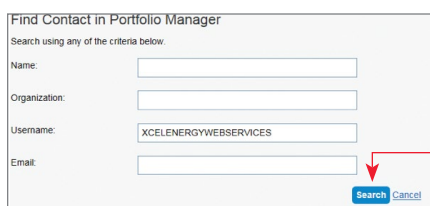
1. In Portfolio Manager, click on **Contacts**.



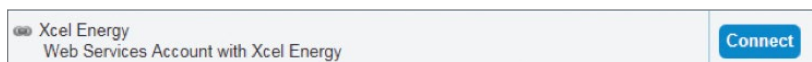
2. Click on **Add Contact**.



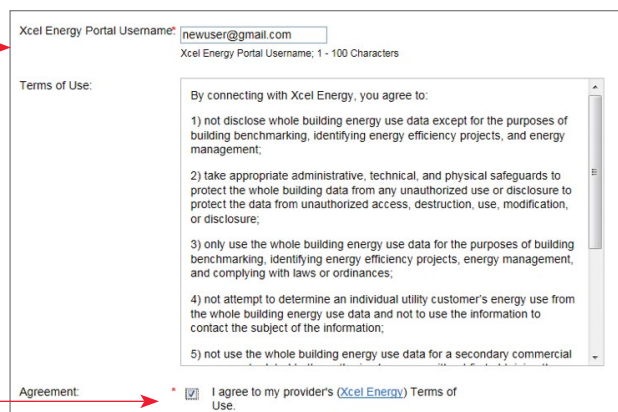
3. Under contact username, type: **XCELENERGYWEBSERVICES** and click on **Search**.



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**.

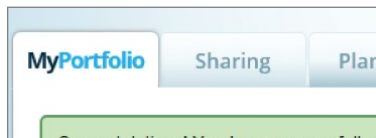
Send Connection Request

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.

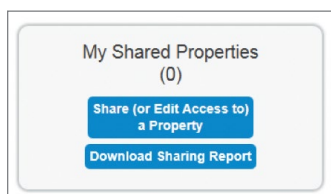
STEP 6

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**.

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?

[- Select Number of Property(ies) -]

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:

Xcel Energy (XCELENERGYWEBSERVICES)

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

Choose Permissions
If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

* ☐ Bulk Sharing ("One-Size-Fits-All") - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).

☒ **Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give **Exchange Data** permission.

Continue [Cancel](#)

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Test (6188684)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Xcel Energy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.

Select the permission level below that you would like to grant [Xcel Energy](#) for each category.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ All Meter Information			
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Recognition	<input type="radio"/>		<input checked="" type="radio"/>

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](#).

Apply Selections and Authorize Exchange

11. Scroll down, and click on [Share Property\(ies\)](#).

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.

Sharing Notifications (3) [View All](#)

 Ren Box Test - Sharing request sent to Xcel Energy	Cancel Clear
 Natural Gas - Sharing request sent to Xcel Energy	Cancel Clear

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.

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

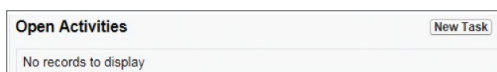
We will make an initial attempt to match tenants to the meters you shared in Step 3. If we have any questions, we'll reach out to you.

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



Open Activities	New Task
No records to display	

- b. Fill out the form, click on **Send**.

We will contact you if we have any additional questions.

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

STEP 12 ONGOING PROCESSING

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

