

United Illuminating (UIL) Integration with ENERGY STAR Portfolio Manager

June 20, 2017

Agenda

Purpose and Objectives

Setup Portfolio Manager Account

- Setup Properties
- Add Meters

Setup Automatic Data Transfer with UIL Web Services

- Request to Connect with UIL Web Services
- Request to Share Properties/Meters

Monthly Bill Data Entries

UIL Contact Information

Questions

Purpose and Objectives

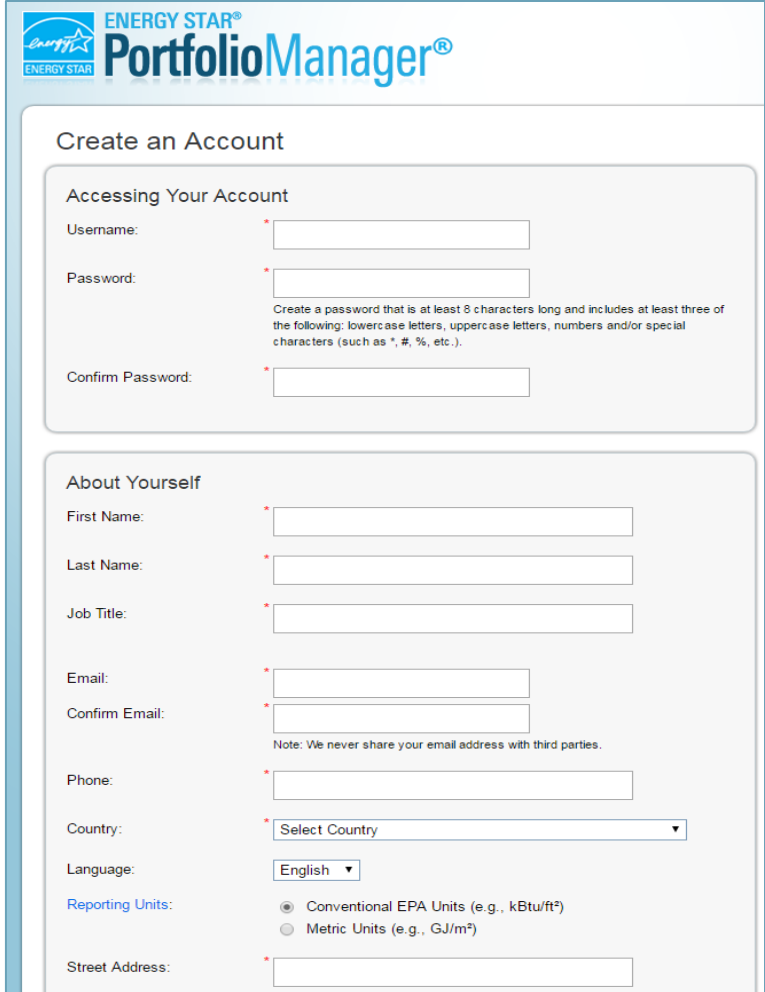
- **Guidance on how to setup your ENERGY STAR Portfolio Manager (ESPM) account**
- **Provide the steps on how to exchange data between ENERGY STAR Portfolio Manager and UIL**
- **Key Outcomes include:**
 - Your utility will automatically provide your electric and natural gas billing data to Portfolio Manager
 - Portfolio Manager will have up-to-date consumption information for calculating metrics and the ENERGY STAR score



SETUP PORTFOLIO MANAGER ACCOUNT

Setup Portfolio Manager Account

- 1) To register for an account with ENERGY STAR Portfolio Manager (ESPM) go to <https://portfoliomanager.energystar.gov/pm/signup> and complete the form.
- 2) Click **Create My Account** to complete your registration. You will receive an email confirmation within 24 hours with a link to activate your account.
- 3) Click on the link in your confirmation email to activate your account.
- 4) Enter your user name and password and click **Sign In**.



The screenshot shows the 'Create an Account' page for ENERGY STAR Portfolio Manager. The page is divided into two main sections: 'Accessing Your Account' and 'About Yourself'. The 'Accessing Your Account' section includes fields for Username, Password, and Confirm Password. A note specifies that the password must be at least 8 characters long and include lowercase letters, uppercase letters, numbers, and/or special characters. The 'About Yourself' section includes fields for First Name, Last Name, Job Title, Email, Confirm Email, Phone, Country (a dropdown menu), Language (a dropdown menu), Reporting Units (radio buttons for Conventional EPA Units and Metric Units), and Street Address. A note states that the email address will not be shared with third parties.

ENERGY STAR® Portfolio Manager®

Create an Account

Accessing Your Account

Username: *

Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

Confirm Password: *

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: * Select Country

Language: English

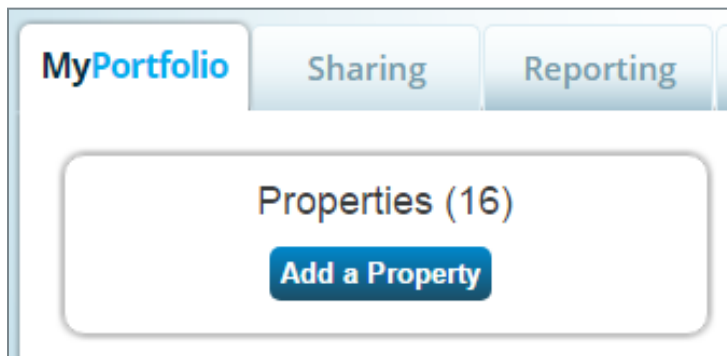
Reporting Units: Conventional EPA Units (e.g., kBtu/ft²) Metric Units (e.g., GJ/m²)

Street Address: *

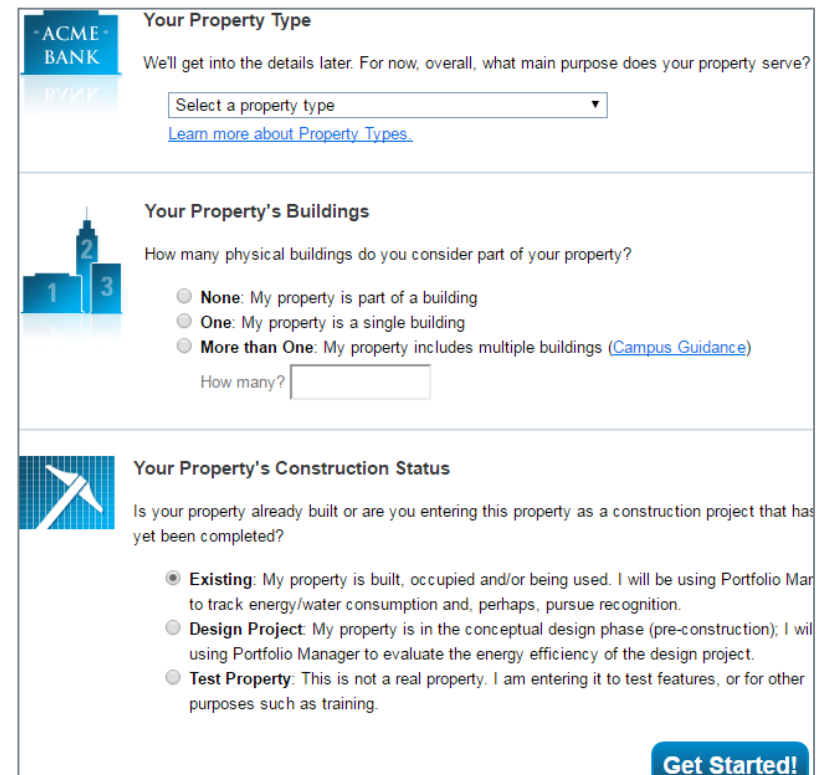
Setup Properties

Setup a Property

1) Click **Add a Property** on the MyPortfolio tab.



2) Enter the property information - property type, number of buildings on property, construction status – and click on **Get Started!**

A screenshot of the 'Your Property Type' form in the software. The form is titled 'ACME BANK' and 'RVPK'. It contains three main sections: 1. 'Your Property Type' with a dropdown menu for 'Select a property type' and a link 'Learn more about Property Types'. 2. 'Your Property's Buildings' with a bar chart showing 1, 2, and 3 buildings, and radio button options for 'None', 'One', and 'More than One' (with a 'Campus Guidance' link), plus a 'How many?' input field. 3. 'Your Property's Construction Status' with radio button options for 'Existing', 'Design Project', and 'Test Property'. A blue 'Get Started!' button is located at the bottom right of the form.

Property Information

Enter the basic property information and click on **Continue**.

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name: *

Country: *

Street Address: *

City/Municipality: *

State/Province: *

Postal Code: *

Year Built: *

Gross Floor Area: * Temporary Value
Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. [Details on what to include.](#)

Irrigated Area: %

Occupancy: * %

Do any of these apply?

My property's energy consumption includes [parking areas](#)

My property has athletic fields with exterior lighting

My property has a [heated swimming pool](#)

25% or more of the students attend the School exclusively for preschool/day care

Account Naming Protocol (*do NOT use spaces between words*):

K-12 Schools – use CTK12 and the following structure:

CTK12_[District Name]_[Building Name as Listed in Utility Tracking Records]
District Name

SD: School District

RSD: Regional School District + number

Examples: CTK12_AndoverSD_AndoverElementarySchool &

CTK12_RSD19_EOSmithHighSchool

Local Governments – use CTLG and the following structure:

CTLG_[Government Name]_[Building Name as Listed in Government Use Tracking Records]

Example for Fire House belonging to City of Hartford:

CTLG_Hartford_FireHouse_1100MainSt

State Agencies – use CT plus 3-letter agency abbreviations and the following structure:

CT[Agency Abbreviation]_[Town where building is located]_[Building Name as Listed in Agency Utility Use Tracking Records]_[Address]

Example for State Office Building owned by Dept of Administrative Services:

CTDAS_Hartford_StateOfficeBuilding_165CapitolAve

BOR Public Higher Education Institutions – use CTBOR and the following structure:

CTBOR_[Institution Abbreviation Campus Name]_[Town]_[Building Name as Listed in Utility Tracking Records]

Example for American Hall at Eastern Connecticut State University:

CTBOR_ECSU_Windham_AcademicHall

Uconn Public Higher Education Institutions – use CTUCONN and the following structure:

CTUCONN_[Town where campus is located]_[Building Name as Listed in Utility Tracking Records]

Example for Jones Hall at University of Connecticut Torrington Campus:

CTUCONN_Torrington_JonesHall

Property Usage Information

Enter usage details for property and click on **Add Property** to create property.

Reference <https://portfoliomanager.energystar.gov/pm/glossary> for Property Use Details definitions.

Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

Basic Information

Name: CTK12_TestISD_TestElementarySchool Country: US

Property Type: K-12 School Address: 123 Main St. Andover, MA 01810 [Map It](#)

Year Built: 1980

Property consists of: 2 buildings [Edit](#)

[Add Another Type of Use](#) [Add](#)

Building Use [Edit Name](#)

K-12 School refers to buildings or campuses used as a school for Kindergarten through 12th grade students. This does not include college or university classroom facilities/laboratories, or vocational, technical, trade, adult, or continuing education schools.

Gross Floor Area should include all space within the building(s), including classrooms, administrative space, conference rooms, kitchens used by staff, lobbies, cafeterias, gymnasiums, auditoriums, laboratory classrooms, portable classrooms, greenhouses, stairways, atriums, elevator shafts, small landscaping sheds, and storage areas.

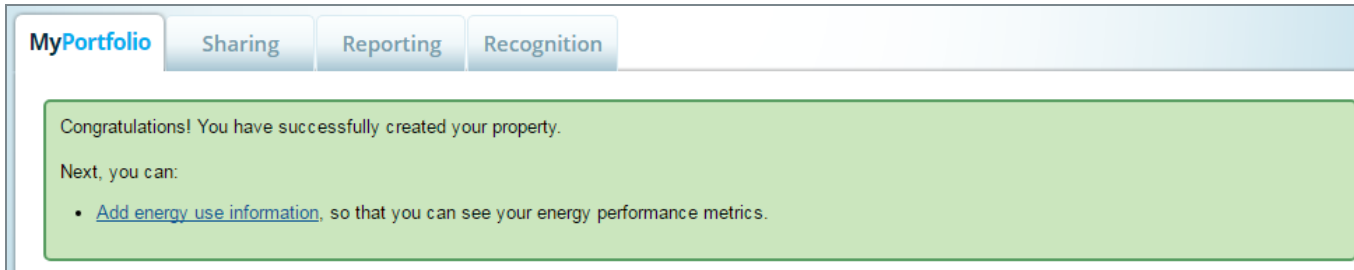
The ENERGY STAR score for K-12 School does not apply to preschool or day care buildings; in order to classify as K-12 school, more than 75% of the students must be in kindergarten or older.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	5,000 <input type="text"/> Sq. Ft. ▼	1/1/1980 <input type="text"/>	<input type="checkbox"/>
Gymnasium Floor Area	0 <input type="text"/> Sq. Ft. ▼ <input checked="" type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
★ High School	No ▼ <input checked="" type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
Number of Workers on Main Shift	3.85 <input type="text"/> <input checked="" type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
Student Seating Capacity	50 <input type="text"/> <input checked="" type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
Months in Use	<input type="text"/>	1/1/1980 <input type="text"/>	<input type="checkbox"/>
★ Weekend Operation	No ▼ <input checked="" type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>

★ All fields denoted with a blue star are required to calculate the ENERGY STAR score.

Property Creation Confirmation

System notifies user that property has been created.



The screenshot shows a user interface for 'MyPortfolio'. At the top, there are four tabs: 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Below the tabs is a green notification box with the following text:

Congratulations! You have successfully created your property.

Next, you can:

- [Add energy use information](#), so that you can see your energy performance metrics.

Reference the Portfolio Manager Quick Start Guide on additional details on how to add property and meter information:

https://www.energystar.gov/sites/default/files/tools/Portfolio%20Manager%20Quick%20Start%20Guide_0.pdf

Add Meters

Add a Meter

- 1) Click the property under the Properties section on the MyPortfolio tab to which you want to add a meter.

The screenshot shows the 'MyPortfolio' interface with tabs for 'Sharing', 'Reporting', and 'Recognition'. The 'Properties (10)' section is highlighted, featuring an 'Add a Property' button. Below it is a 'Source EUI Trend (kBtu/ft²)' line graph showing data points from 2006 to 2016. The 'Properties (10)' list includes 'Sample K-12 School (US)' and 'Sample Library (US)', each with an 'Add a Property' button and an 'Action' dropdown menu.

- 2) Select the Energy tab and click on Add A Meter.

The screenshot shows the 'MyPortfolio' interface with the 'Energy' tab selected. The 'Meter Summary' section displays '0 Energy Meters Total' and a warning message: 'There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. Enter information about your energy meters to begin tracking energy usage. After entering the meter, you will need to choose to include it in your metrics.' An 'Add A Meter' button is highlighted with a red box.

- 3) Select sources of the property's energy and click on Get Started!

The screenshot shows the 'Sources of Your Property's Energy' form. It asks 'What kind of energy do you want to track? Please select all that apply.' The form includes checkboxes for 'Electric' and 'Natural Gas', each with a 'How Many Meters?' input field. The 'Electric' section has sub-options: 'purchased from the grid' (checked), 'generated onsite with my own solar panels', and 'generated onsite with my own wind turbines'. The 'Natural Gas' section has a 'How Many Meters?' input field set to '1'.

Meter Information

Enter meter details and click on **Create Meters**.

About Your Meters for CTK12_TESTSD_TestElementarySchool

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

2 Energy Meters for CTK12_TESTSD_TestElementarySchool (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"/>	G-12345678901111-S CG Meter 1234567 SB Meter 123000	Natural Gas				<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	E-1234567890111-UI Meter 123456789	Electric - Grid				<input checked="" type="checkbox"/>		<input type="checkbox"/>

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

[Cancel](#)

Meter Naming Protocol:

Letter Designation

E – Electric grid meter
 G - Natural gas meter
 O – Oil delivery
 P – Propane delivery
 S - Solar electric meter
 W – Water meter
 X – Closed meter

Electric Utility Company Abbreviations

UI – United Illuminating
 WE – Wallingford Electric
 LP – Liberty Power Electric (3rd Party)
 TC – Transcanada Electric (3rd Party)
 DE – Direct Energy Electric (3rd Party)
 Noble – Noble Americans (3rd Party)
Natural Gas Utility Company Abbreviations
 SCG – Southern Connecticut Gas
 SB – Santa Buckley Gas (3rd Party)
Oil and Water Utility Companies
 East River – East River Energy (Oil)
 Aquarion - Aquarion (Water)
 RWA - Regional Water Authority (Water)

Utility Account Number

UI Example: 1221001108001 (no dashes) POD/ Legacy Account Number
 SCG Example: 500010776468 (no dashes) Contract Account Number

- Meter Name:
 - Electric Naming Convention: E-[POD ID]-[Electric Utility Abbreviation] Meter [UI Meter Number]
 - **Electric Example: E-1234567890111-UI Meter 123456789**
 - Gas Naming Convention: G-[Account Number]-[Gas Utility Abbreviation] Meter [Gas Meter Number]
 - **Gas Example: G-1234567890111-SCG Meter 1234567 SB Meter 123000**
- Units: Select from the dropdown menu; UIL bills in kWh for electric and ccf for natural gas
- Date Meter became Active*: UIL will only transmit data from the last 12 months from current date

*Enter current date and prior year for Date Meter became Active field.

Meter Usage Information

Only enter billing data here if you want to enter it manually.

Click on Continue to skip entering usage information manually.

Your Meter Entries for CTK12_TESTSD_TestElementarySchool

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!


2 Energy Meter(s) for CTK12_TESTSD_TestElementarySchool

▼ G-12345678901111-SCG Meter 1234567 SB Meter 123000

Start Date	End Date	Usage ccf (hundred cubic feet)	Cost (\$)	Estimation
Click to add an entry				

✖ [Delete Selected Entries](#)
+ [Add Another Entry](#)
📄 [Learn how to copy/paste](#)

Upload data in bulk for this meter:

 You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

▶ E-1234567890111-UI Meter 123456789

[Cancel](#)

Meters Included in Metrics

Verify the meters that should be included in your Energy metrics and click on **Apply Selections**.

Your meter entries have been added to your meters!

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for [CTK12_TESTSD_TestElementarySchool](#) so that we can provide you with the most accurate metrics possible.

Summary

2

Meters representing the total energy consumption for [CTK12_TESTSD_TestElem](#) (a campus of 4 buildings).

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 metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

.....

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 type="checkbox"/>	G-12345678901111-SCG Meter 1234567 SB Meter 123000 31251192	Natural Gas
<input checked="" type="checkbox"/>	E-1234567890111-UI Meter 123456789 31251193	Electric - Grid

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

- These meter(s) account for the total energy consumption for [CTK12_TESTSD_TestElementarySchool](#) (a campus of 4 buildings).
- These meter(s) do not account for the total energy consumption for [CTK12_TESTSD_TestElementarySchool](#) (a campus of 4 buildings).

Apply Selections [Cancel](#)

Meter Creation Confirmation

System notifies user that meter(s) has been associated to the selected property.

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

CTK12_TESTSD_TestElementarySchool
123 Main St., Andover, MA 01810 | [Map It](#)
Portfolio Manager Property ID: 5972885
Year Built: 1970
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/ft²) Why not source?
Current EUI: [N/A](#)
Baseline EUI: [N/A](#)

Summary | Details | **Energy** | Water | Waste & Materials | Goals | Design

Meter Summary
2 Energy Meters Total
2 - Used to Compute Metrics
[Add A Meter](#)
Current Energy Date Not Available
[Enter Your Bills](#)

Meters - Used to Compute Metrics (2) [Add A Meter](#)
[Change Meter Selections](#)
[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
E-1234567890111-UJ Meter 123456789 31251193	Electric - Grid		Yes
G-1234567890111-SCG Meter 1234567 123000 31251192	Natural Gas		Yes

[Download Annual Totals by Meter](#)

Four Ways to Enter Bill Data

Reference the Portfolio Manager Quick Start Guide on additional details on how to add property and meter information:

https://www.energystar.gov/sites/default/files/tools/Portfolio%20Manager%20Quick%20Start%20Guide_0.pdf



SETUP AUTOMATIC DATA TRANSFER

Overview

- Users must set up a connection with the UIL web services account to exchange data with ESPM. This will give users access to share their properties/meters with the utility company.
- In the first step, the user will add the UIL web services account as a “contact” and send the utility a connection request. After the utility employee accepts the connection, the user will have the ability to share properties/meters information with the UIL web services account. Once the meter(s) shares have been accepted, UIL will automatically send your billing data to Portfolio Manager so that benchmark scores stay current for the last 12-month period.
- This section outlines the connection and property/meter sharing steps.

Connect with UIL

Access and Add Contact

- 1) Click on the **Contacts** link in the upper right-hand corner to go to the My Contacts page.
- 2) Select **Add Contact** to search for the UIL web services account on the Add Contacts page.

Welcome Demo_Screenshots: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | Sharing | Reporting | Recognition

My Contacts

[Search for new 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.

[Share](#) [Edit](#) [Delete](#) [Add Contact](#) [Add Organization](#)

All	<input type="checkbox"/>	Name	Organization
T	<input type="checkbox"/>	Test Organization Energy Efficiency Program	Test Organization
U	<input type="checkbox"/>		
W	<input type="checkbox"/>	Demo UAT2 (Demo_UAT2) <small>Connected</small> Project Manager	Aclara Demo

Connect with UIL Web Services Account

- 1) Enter UILCEC in the Username field and click on **Search**.
- 2) Select the *United Illuminating Clean Energy Communities* organization and click **Connect**.

The screenshot shows a web interface with a navigation bar at the top containing 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Below this is a 'Search Results' section with a descriptive paragraph. On the left is a 'Your Search Criteria' form with fields for Name, Organization, Username (containing 'UILCEC'), and Email Address, along with a 'Search' button. On the right is a results table with one entry: 'UIL Web Service Portal' with the subtitle 'Web Services Account with United Illuminating Clean Energy Communities' and a 'Connect' button. Below the table is a pagination control showing 'Page 1 of 1' and a dropdown menu set to '50'.

UIL Web Service Portal		Connect
Web Services Account with United Illuminating Clean Energy Communities		
1 - 1 of 1		

Send Connection Request

- 1) Read the *Terms of Use* and check the box indicating agreement.
- 2) Click **Send Connection Request** to the UIL Web Services Account.

Send a Connection Request to [UIL Web Service Portal](#) to Begin Exchanging Data

[UIL Web Service Portal](#) 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 [UIL Web Service Portal](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use:

Terms and Conditions: You may use UIL's services to interface with EPA's Data Exchange Platform only if you are a customer of the utility and agree to the detailed Terms and Conditions set forth on our company's website

Agreement: I agree to my provider's ([UIL Web Service Portal](#)) Terms of Use.

Send Connection Request [Cancel](#)

Follow Us [t](#) [f](#) [v](#) [i](#)

[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

Once the connection request is accepted, you will receive a notification in the Notifications dashboard on the MyPortfolio tab.

Share Properties/Meters with UIL

Share Properties

Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.

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

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:

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

3 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.

Sharing with Accounts

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

Exchanging Data

To get started, first [connect with an organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left. **Note: you can now share in bulk for [exchanging data](#).**

Who gets to Share Forward?

Full Access - Automatically includes "Share Forward" rights
Read Only - Automatically does NOT include "Share Forward" rights
Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
Exchange Data - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

1) Click on the **Sharing** tab and select **Share (or Edit Access to) a Property**.

2) On the **Share (or Edit Access to) Properties** screen, the user:

- Selects the property(ies) that he/she would like to share
- Selects the UIL Web Services Account
- Selects the bubble for Personalized Sharing & Exchange Data ("Custom Orders") field

3) Click on **Continue**.

Setup Account Information to Exchange Data

Click the button under Exchange Data column to begin account verification for the meters under the specific property.

MyPortfolio | **Sharing** | Reporting | Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

4 **Select Permissions for Each Contact**
The access levels you select do not have to be the same for each property or each person.

Sort by: Property Name ▾

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
CTK12_TESTSD_TestElementarySchool (5972885)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Web Service Portal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Share Property(ies) [Cancel](#)

NEW Who gets to Share Forward?
Full Access - Automatically includes "Share Forward" rights
Read Only - Automatically does NOT include "Share Forward" rights
Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
Exchange Data - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Account Verification


Valid account information will be needed for each meter to verify the correct data is sent

- Enter the 14-digit **Account Number** (required)
 - Located at the top of your utility bill
 - Do NOT enter dashes
- Enter the 13-digit **POD Id** from your bill (if available)
 - Located on your bill under “New Charges & Credits”
 - Do not enter dashes
- Select **Full Access** for the level of access to be able to exchange data for a property and its meters

Select Access Permissions to [CTK12_TESTSD_TestElementarySchool](#) for [Web Service Portal](#).
how to complete this information, please contact them directly.

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

Item	None	Read Only Access	Full Access	Account Id ¹	POD Id ²
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
▼ All Meter Information					
▼ Energy Meters					
E-1234567890111-UI Meter 123456789	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="1234567890000"/>	<input type="text" value="1234567890111"/>
				<input type="text" value="1234567890111"/>	

Goals  **Residential Rate**

1 Account Number
000-0000000-0000

Call us anytime at 1-800-7-CALL UI (1-800-722-5664)
In the Greater New Haven calling area, dial 203-499-3333

RESIDENTIAL CUSTOMER
123 ANY ST
ANY TOWN, CT 00000

Please consider adding \$1 for Operation Fuel to your payment this month

Your Account Information

Customer Name Key: CUST	Account Number: 000-0000000-000
RESIDENTIAL CUSTOMER	Meter Number: 000000000
123 ANY ST	Trans and Dist Rate: R - Residential
ANY TOWN, CT 00000	Generation Rate: Standard Service
	Billing Period: 12/09/14 - 1/07/15
	Statement Date: 1/09/15
	Next Meter Reading (on or about): 2/06/15

Previous Charges & Credits

Amount of Previous Bill	12/10/14
Payment Received, Thanks!	12/29/14

Balance Forward

New Charges & Credits

POD 0000000000000 (CYCLE 04)

Account Verification

Select 'No' for Share Forward access and click **Apply Selections & Authorize Exchange**.

Select Access Permissions to [CTK12_TESTSD_TestElementarySchool](#) for [Web Service Portal](#).

G-12345678901111-SCG Meter 1234567 SB Meter 123000	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="12345678901111"/>	<input type="text"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Recognition	<input type="radio"/>		<input checked="" type="radio"/>		

1 Account Id: Example: 1234567890; The account id from your utility bill.; Between 1 and 14 Characters

2 POD Id: Example: 1234567890; The point of delivery for the meter(s).; Between 1 and 30 Characters

Additional Options:

Item	Yes	No
* Share Forward Allow Aclara Web Service Portal to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

Apply Selections & Authorize Exchange [Cancel](#)

Finalize the Data Exchange

Select **Full Access** button and click **Share Property(ies)** to share property/meter information with the UIL web services account.

MyPortfolio | **Sharing** | Reporting | Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

4 Select Permissions for Each Contact
The access levels you select do not have to be the same for each property or each person.

Sort by:

NEW Who gets to **Share Forward**?

- Full Access** - Automatically includes "Share Forward" rights
- Read Only** - Automatically does NOT include "Share Forward" rights
- Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
- Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
CTK12_TESTSD_TestElementarySchool (5972885)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Web Service Portal	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/> Edit

Share Property(ies) [Cancel](#)

Repeat the verification steps for any other properties on your account.

Property/Meter Share Confirmation

System generates notification below confirming that the share request went through

MyPortfolio **Sharing** Reporting Recognition

You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

If you edited web services Custom ID fields, [read this](#).

My Shared Properties (1)
[Share \(or Edit Access to\) a Property](#)

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

↔	CTK12_TESTSD_TestElementarySchool - Sharing request sent to Web Service Portal	Cancel Clear
---	--	---

Another notification will be available in the sharing notifications section once the share request is accepted or rejected by UIL web services account

Notifications (6) [View All](#)

↔	G-1234567890111-SCG Meter 1234567 SB Meter 123000 - Share declined by Aclara Web Service Portal because Your sharing request has been rejected	Clear
↔	E-1234567890111-UI Meter 123456789 - Share accepted by Aclara Web Service Portal because Your sharing request has been verified and accepted.	Clear
↔	CTK12_TESTSD_TestElementarySchool - Share accepted by Aclara	

Property/Meter Resubmission (if property/meter has been denied)

- 1) Click on the property link which you would like to re-submit the meters for on the MyPortfolio tab.
- 2) Click the Exchange Data link under the Sharing this Property section on the Summary tab.

Sharing this Property		
2 People Have Access to this Property		Share
Name	Permissions	Action
Web Service Portal (Test)	Exchange Data Shared by Demo Screenshots	I want to... ▼

- 3) Click on **Edit Permissions** to go to the Edit Permissions screen.

Item	Permissions
Property Information	Full
▼ All Meter Information	None
E-1234567890111-UI Meter 123456789	Full
G-1234567890111-SCG Meter 1234567 SB Meter 123000	None
Goals, Improvements, & Checklists	Full
Recognition	Full
Share With Others	No

[Edit Permissions](#) [Close](#)

- 4) Click on the **Edit** link under the Exchange Data column to re-enter the account number/POD ID.
- 5) Select **Full Access** for the meters and click on the **Apply Selections & Authorize Exchange** button.
- 6) Click on the **Edit Permissions** button to re-submit the share request.



MONTHLY BILL DATA ENTRIES

Monthly Bill Data

The last 12 months of historical billing data will be transferred on a nightly basis once the meter share request is accepted.

To view monthly entries click on the property link on the MyPortfolio Tab → Energy Tab → Meter Name Link:

To display all years, click in the Display Year(s) field and select 'Show All Years'

Monthly Entries							
	Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost (\$)	Display Year(s):		
<input type="checkbox"/>	12/12/2013	1/11/2014	46,713.9	3,503.54	Show All Years X		
						Show All Years	
<input type="checkbox"/>	1/11/2014	2/10/2014	48,286.1	3,621.46		2013	
						2014	
						2015	
<input type="checkbox"/>	2/10/2014	3/12/2014	45,337.6	3,400.32		2016	<input type="checkbox"/> 7/12/2017 Demo_Screenshots
						2017	<input type="checkbox"/> 7/12/2017 Demo_Screenshots
<input type="checkbox"/>	3/12/2014	4/11/2014	43,900.7	3,292.55			<input type="checkbox"/> 7/12/2017 Demo_Screenshots
<input type="checkbox"/>	4/11/2014	5/11/2014	45,554.9	3,416.62			<input type="checkbox"/> 7/12/2017 Demo_Screenshots
<input type="checkbox"/>	5/11/2014	6/10/2014	44,873.3	3,365.50			<input type="checkbox"/> 7/12/2017 Demo_Screenshots
<input type="checkbox"/>	6/10/2014	7/10/2014	51,241.9	3,843.14			<input type="checkbox"/> 7/12/2017 Demo_Screenshots
<input type="checkbox"/>	7/10/2014	8/11/2014	58,242.1	4,368.16			<input type="checkbox"/> 7/12/2017 Demo_Screenshots

Note: system will NOT overwrite any existing monthly entries that have been entered in ESPM

Contact Information

Need Help?

Enter UIL Contact Information

Questions?