United Illuminating (UIL) Integration with ENERGY STAR Portfolio Manager

June 20, 2017

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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

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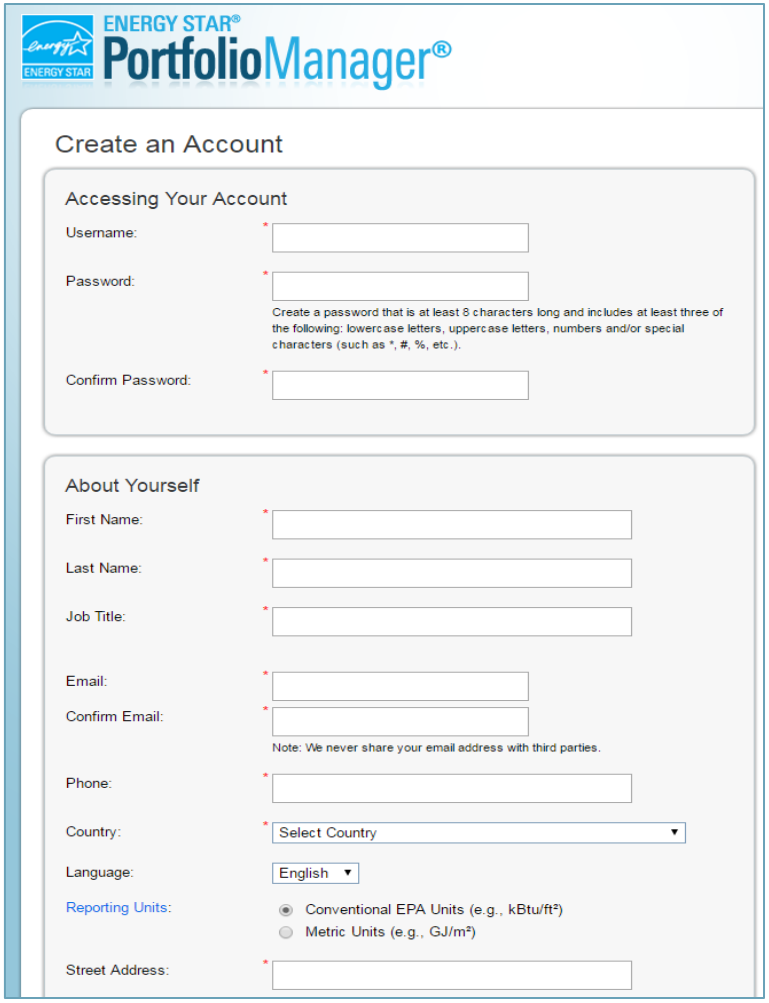
Setup Portfolio Manager Account

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.**



Setup Properties

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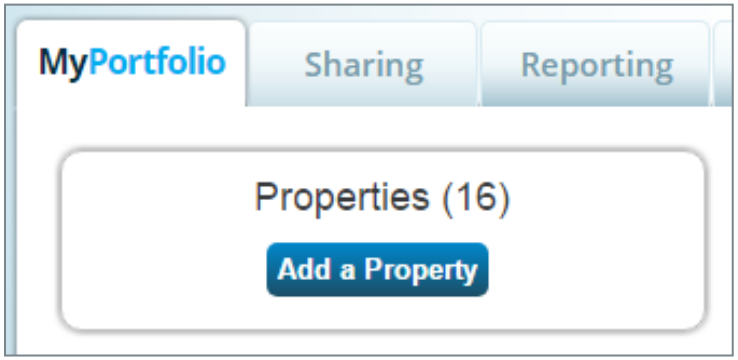
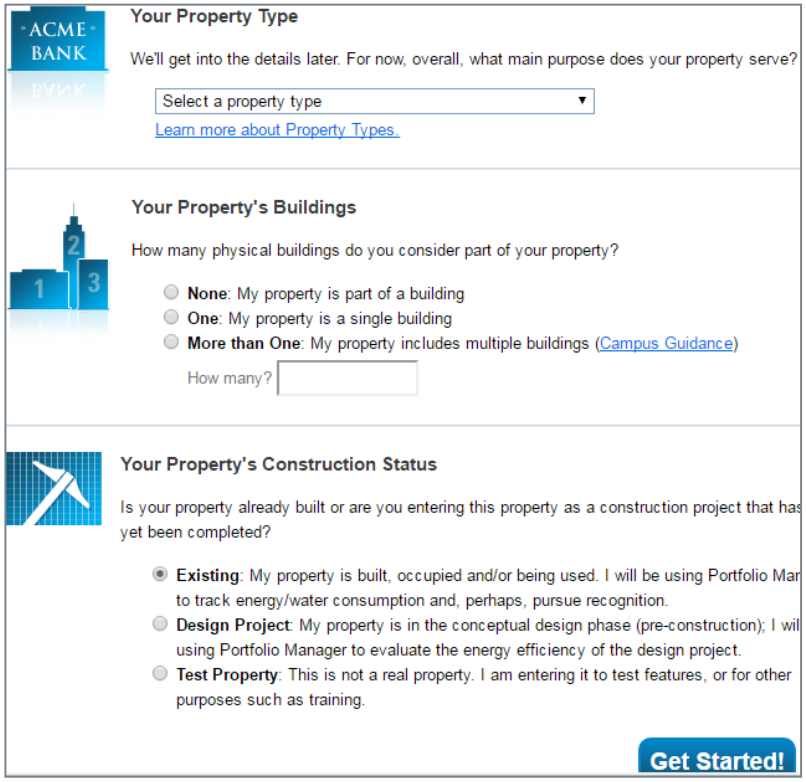
Setup a Property

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

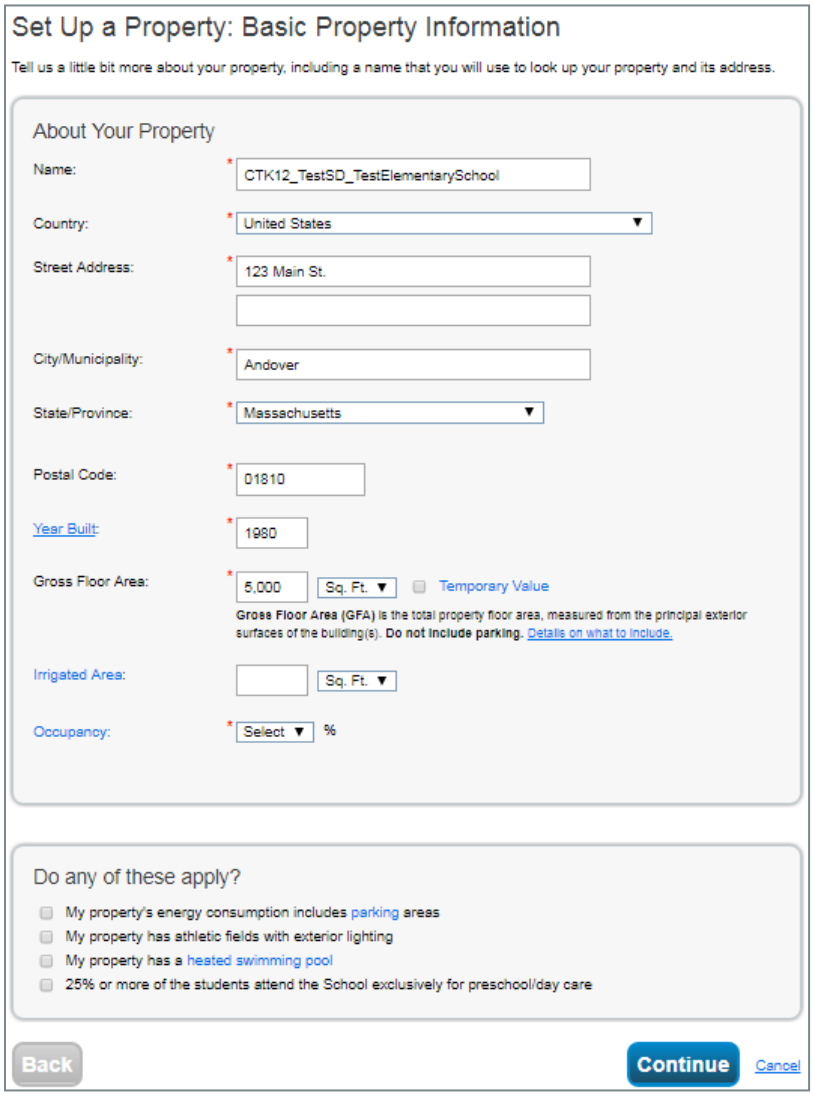


2) Enter the property information - property type, number of buildings on property, construction status – and click on **Get Started!**



Property Information

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



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

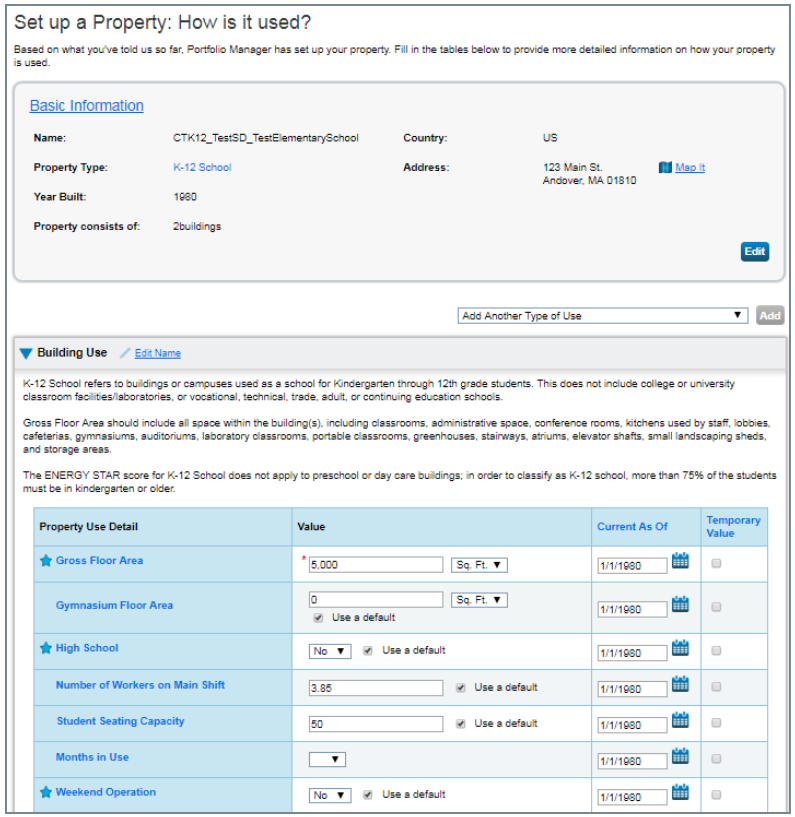
BOR Public Higher Education Institutions – use CTBOR and the following structure:
CTBOR_[Institution Abbreviation Campus Name]_[Town]_[Building Name as Listed in Utility Tracking Records]
Example for American Hall at Eastern Connecticut State University: CTBOR_ECSU_Windham_AcademicHall

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 Connectinut 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.



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

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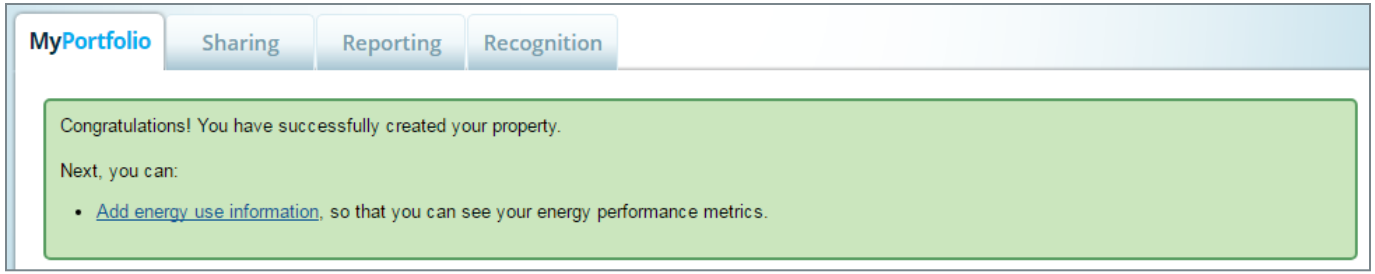
Property Creation Confirmation

System notifies user that property has been created.



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

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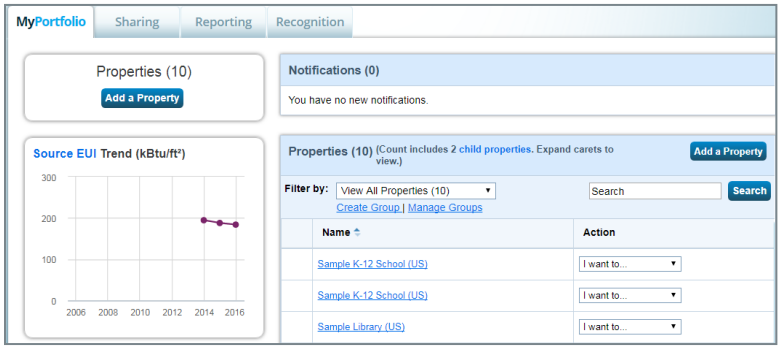
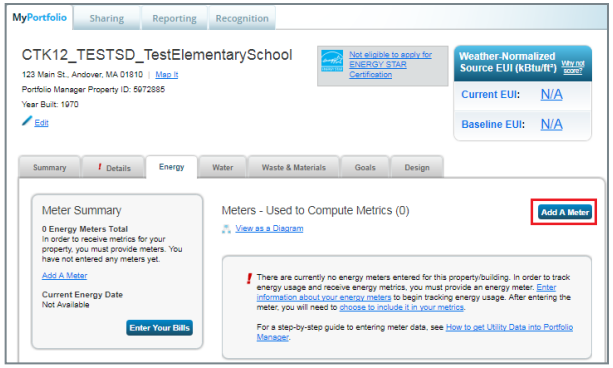
Add a Meter

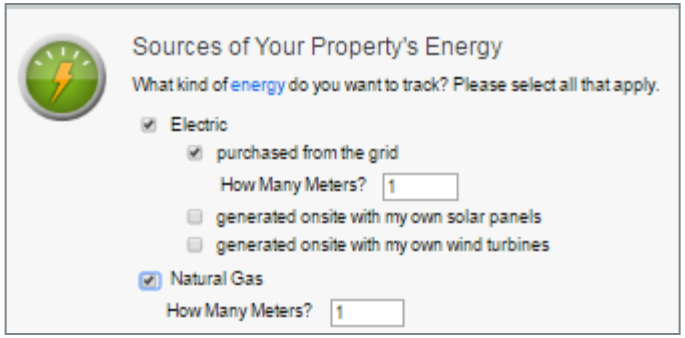
1) Click the property under the Properties section on the MyPortfolio tab to which you want to add a meter.



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

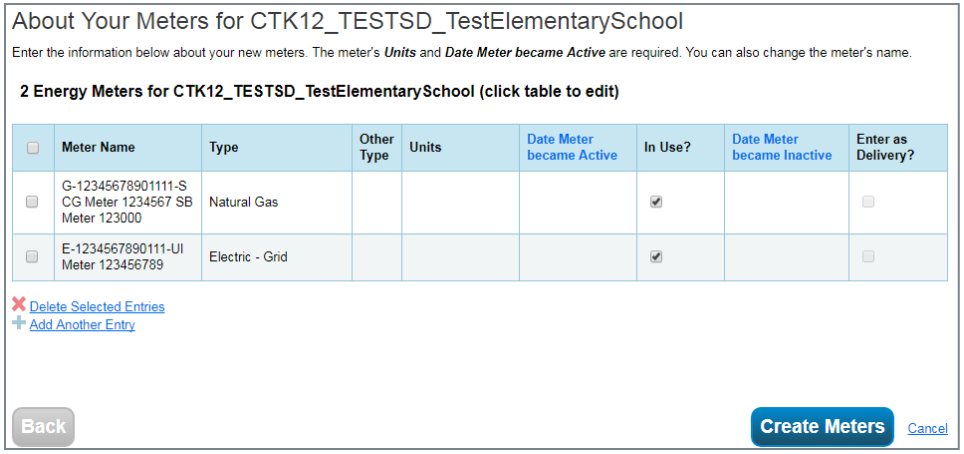


3) Select sources of the property's energy and click on **Get Started!**



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)

	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
☐	G-12345678901111-SCG Meter 1234567 SB Meter 123000	Natural Gas				☑		☐
☐	E-1234567890111-UI Meter 123456789	Electric - Grid				☑		☐

Delete Selected Entries
Add Another Entry

Back | Create Meters | 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

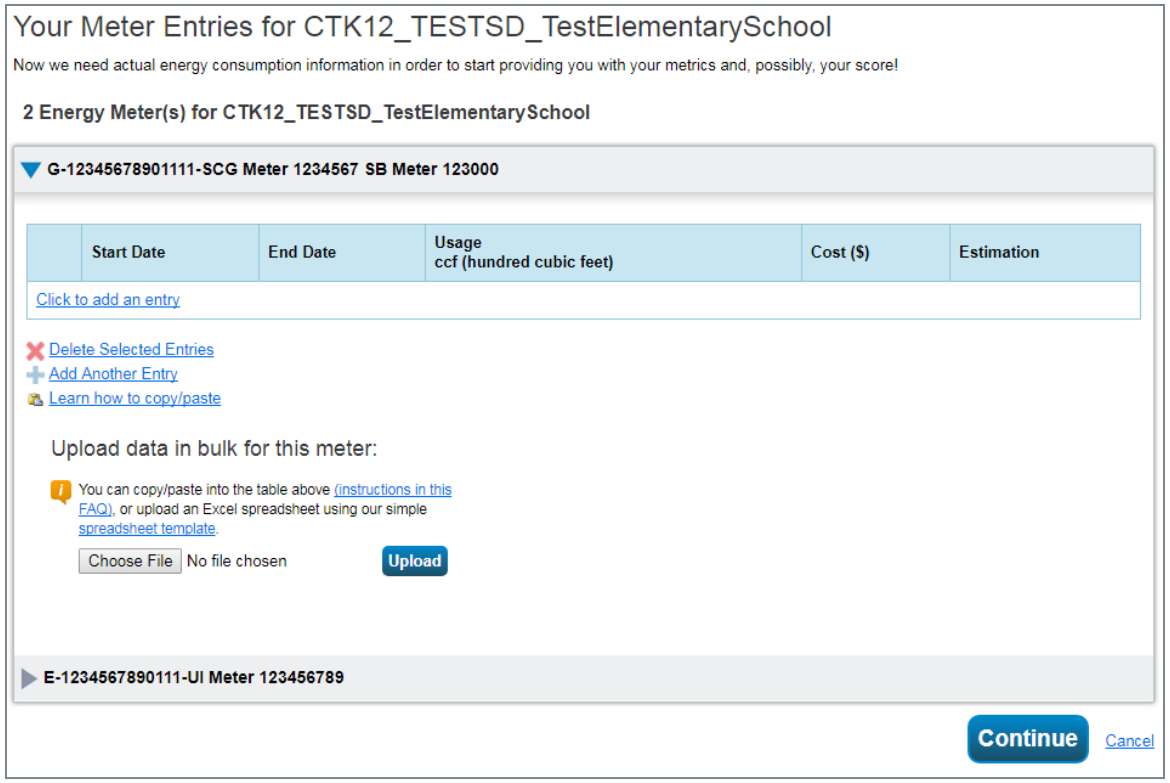
- *Meter Name:*
  - Electric Naming Convention: E-[POD ID]-[Electric Utility Abbreviation] Meter [UI Meter Number]
  - **Electric Example: E-1234567890111-UI Meter 123456789**
  - Gas Naming Convention: G-[Account Number]-[Gas Utility Abbreviation] Meter [Gas Meter Number]
  - **Gas Example: G-12345678901111-SCG 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.



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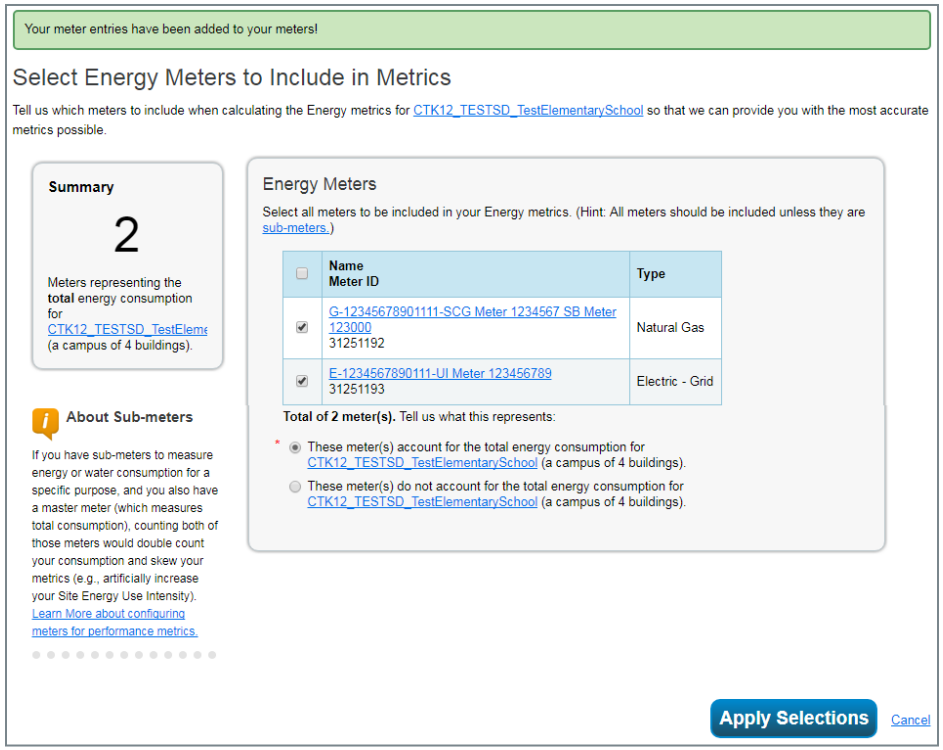
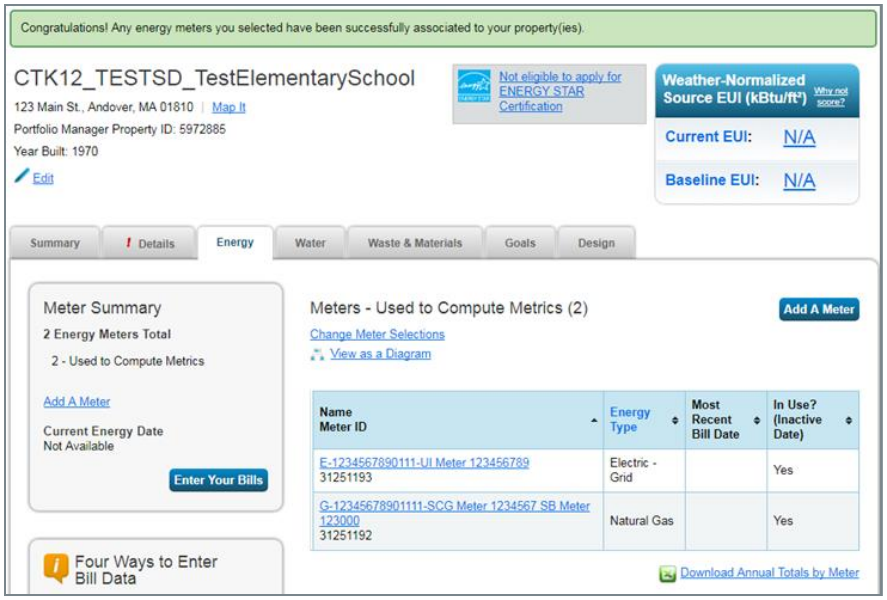
Meters Included in Metrics

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



Meter Creation Confirmation

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



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

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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

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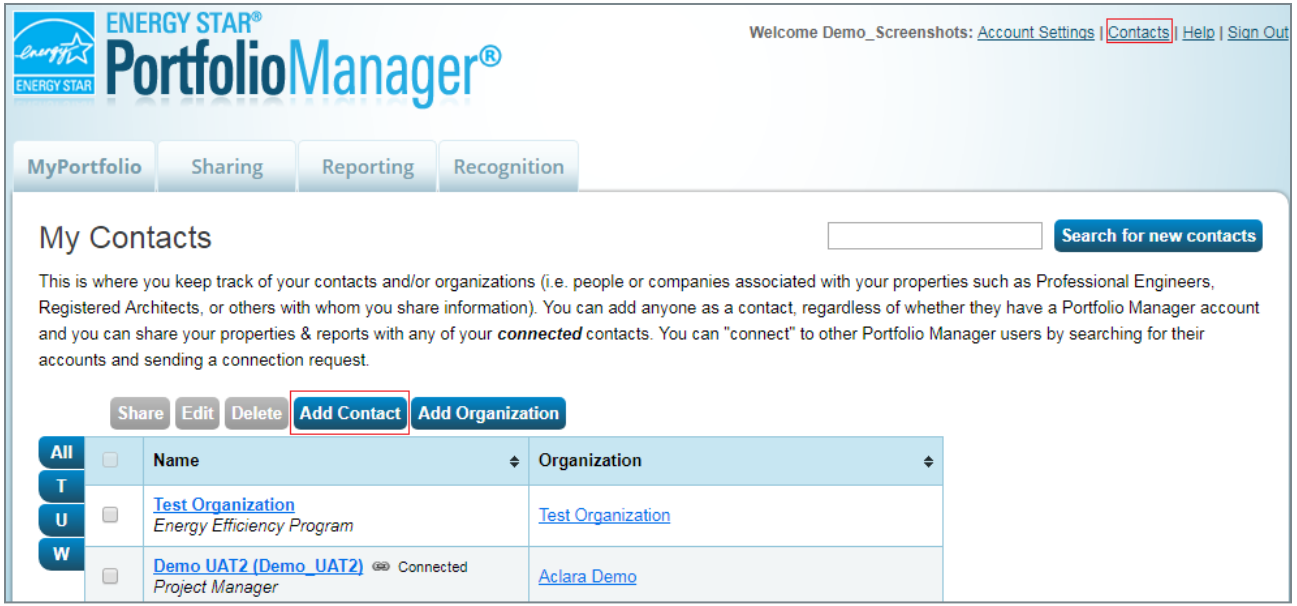
Access and Add Contact

1) Click on the Contacts link in the upper right-hand corner to go to the My Contacts page.

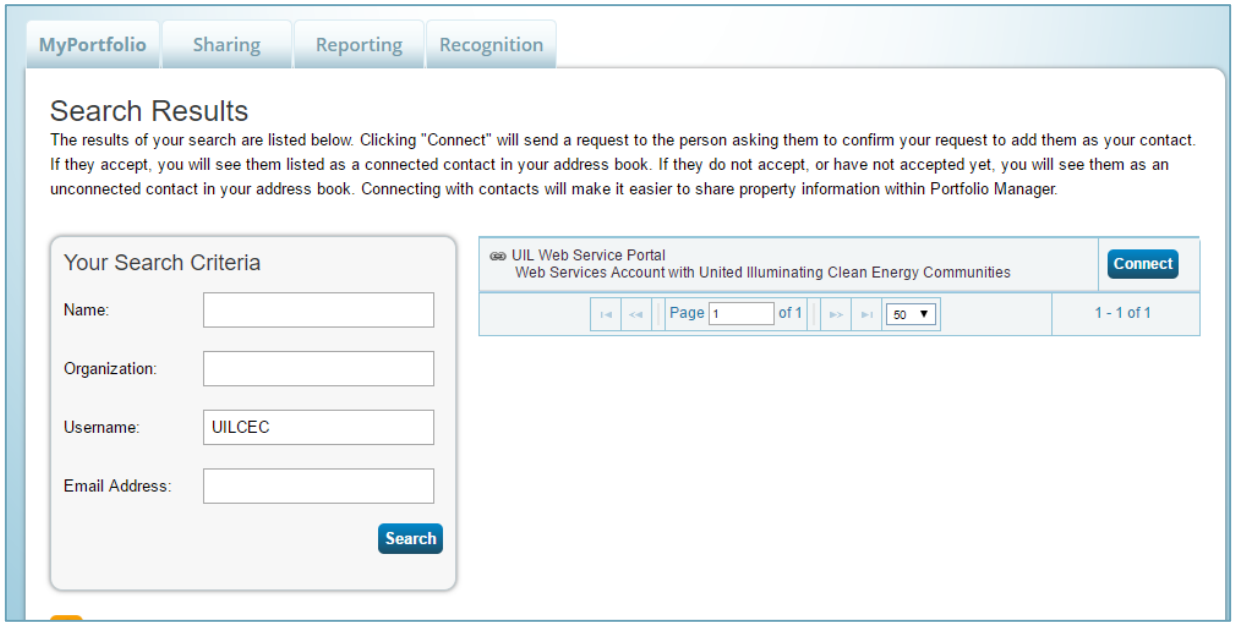
2) Select **Add Contact** to search for the UIL web services account on the Add Contacts page.



Connect with UIL Web Services Account

1) Enter UILCEC in the Username field and click on **Search**.

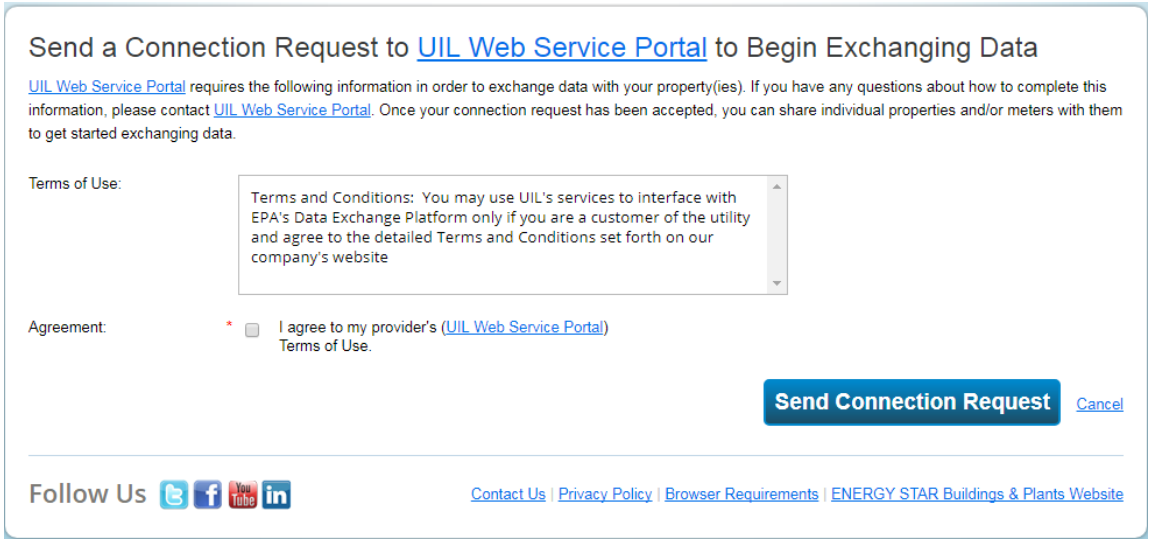
2) Select the *United Illuminating Clean Energy Communities* organization and click **Connect**.



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.



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

Share Properties/Meters with UIL

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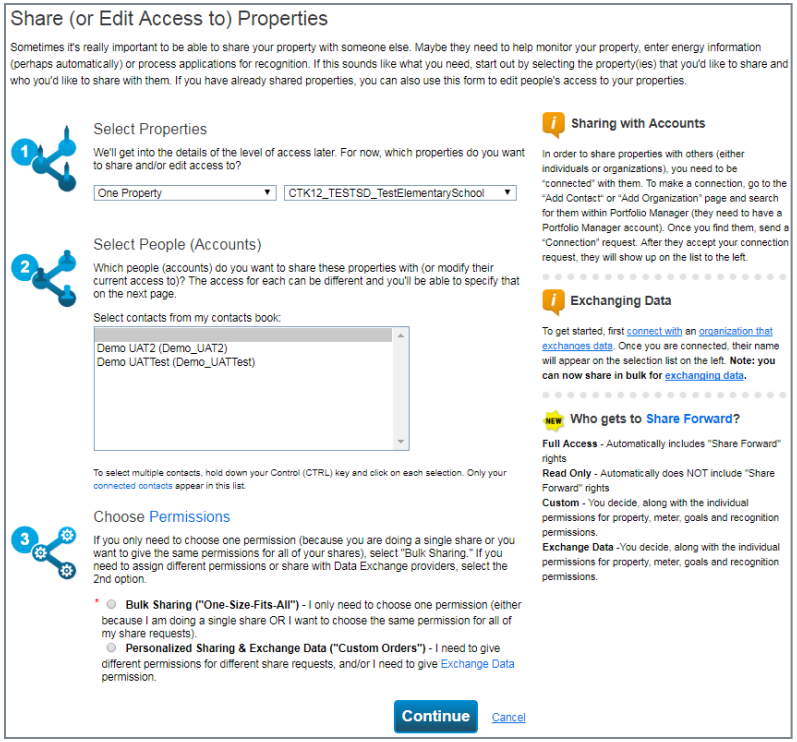
Share Properties



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

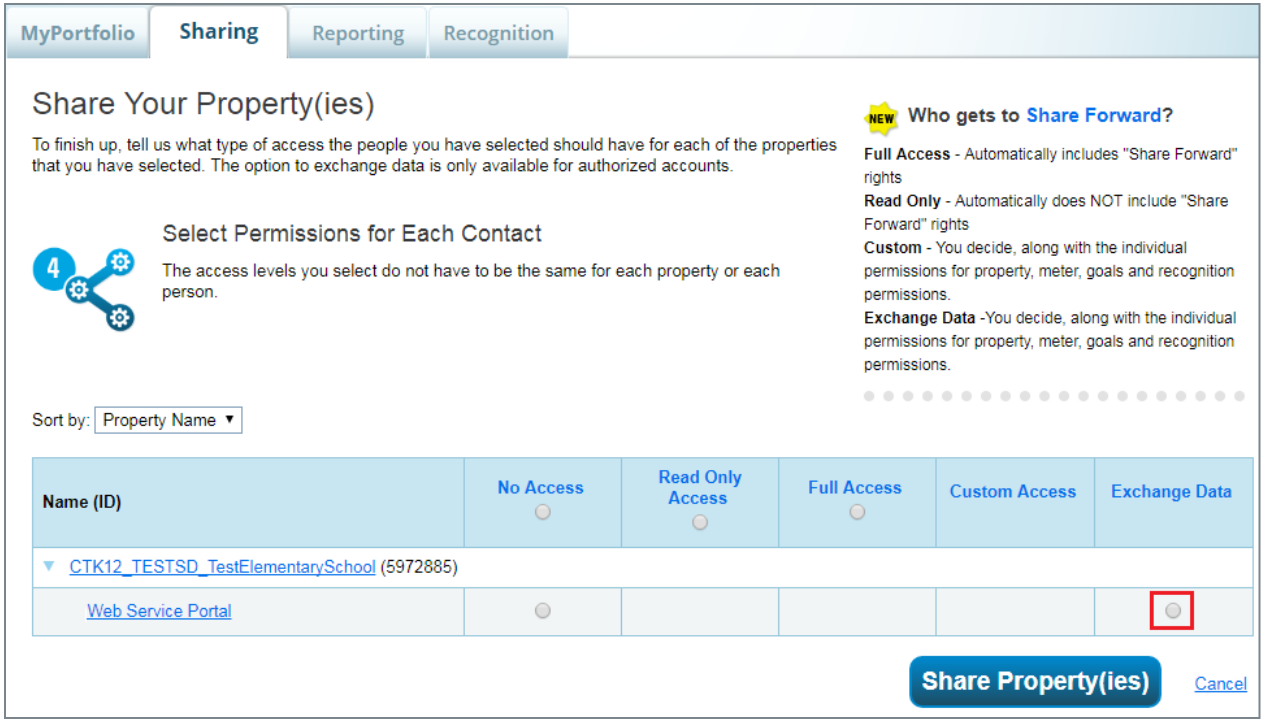
2) On the **Share (or Edit Access to) Properties** screen, the user:

- 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

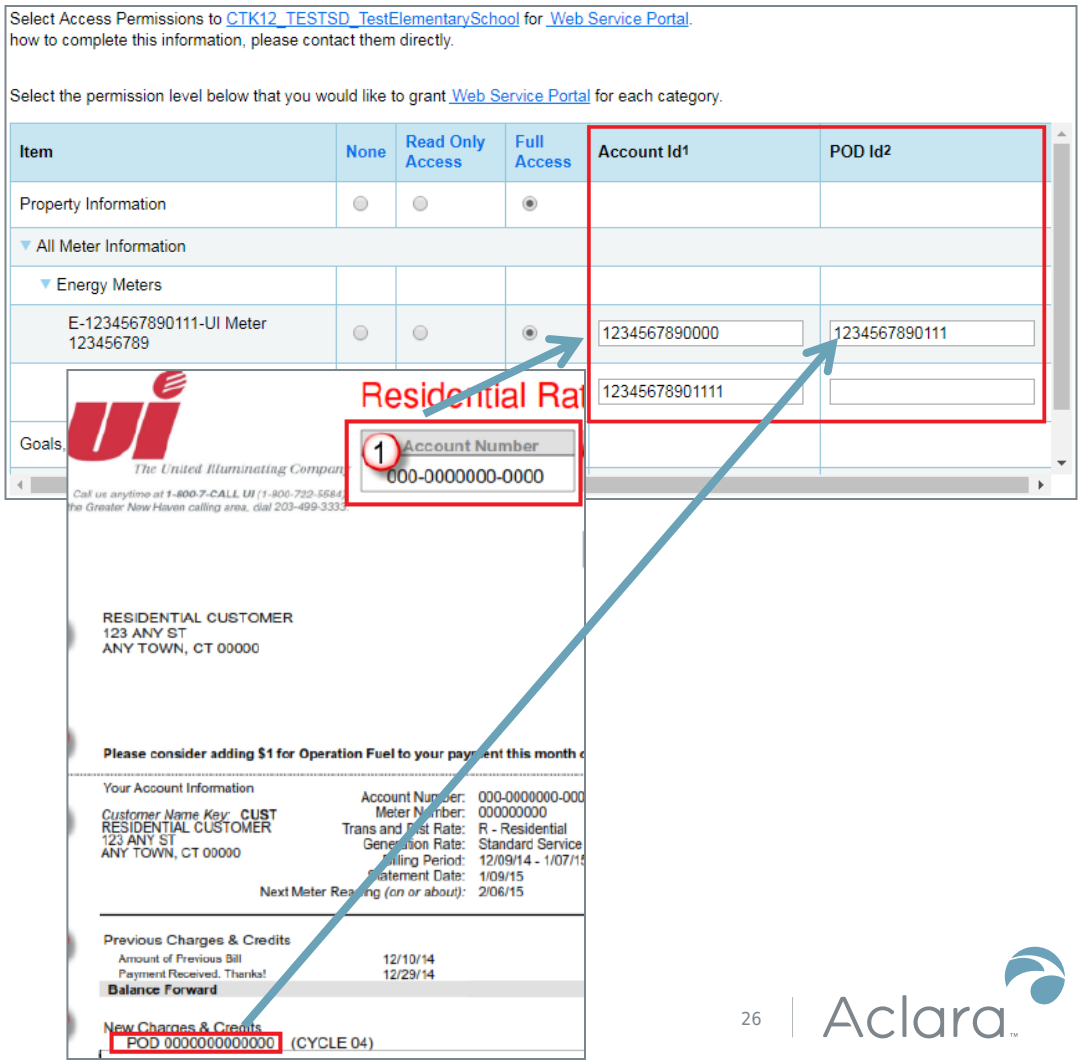
Click the button under Exchange Data column to begin account verification for the meters under the specific property.



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



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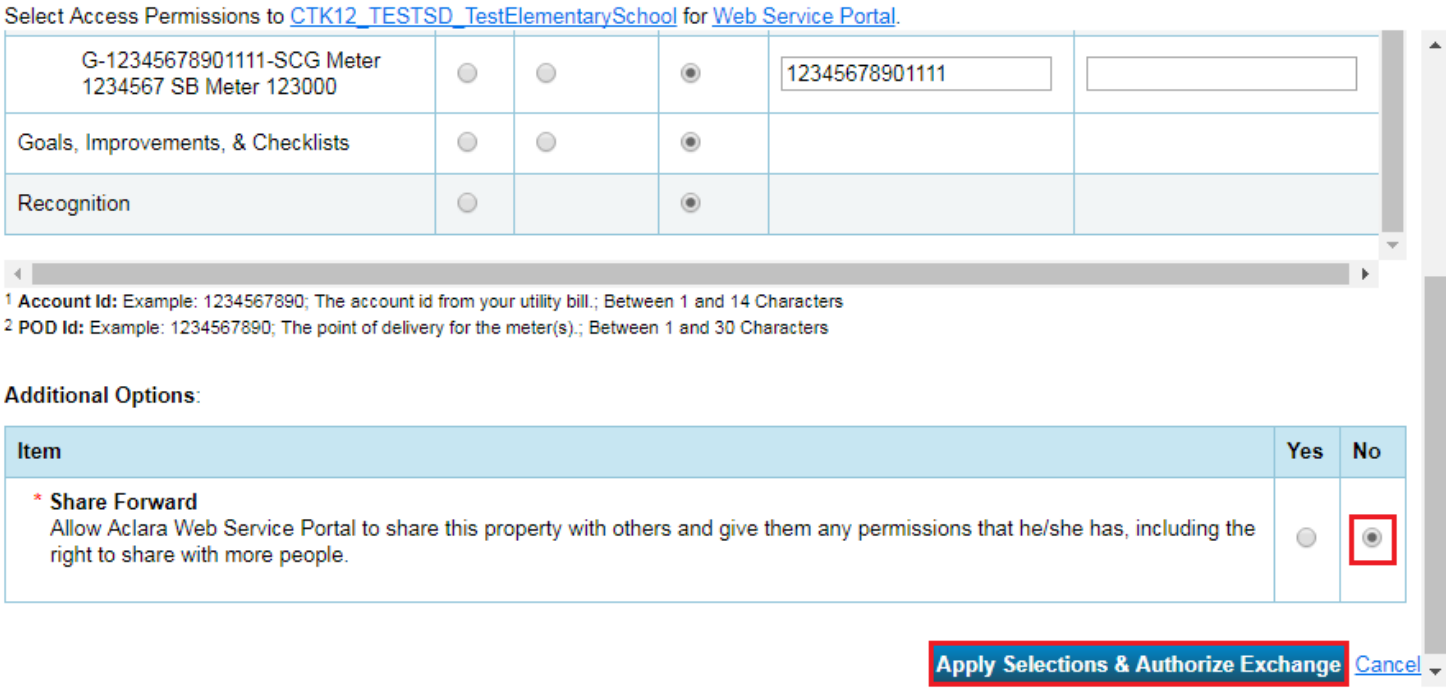
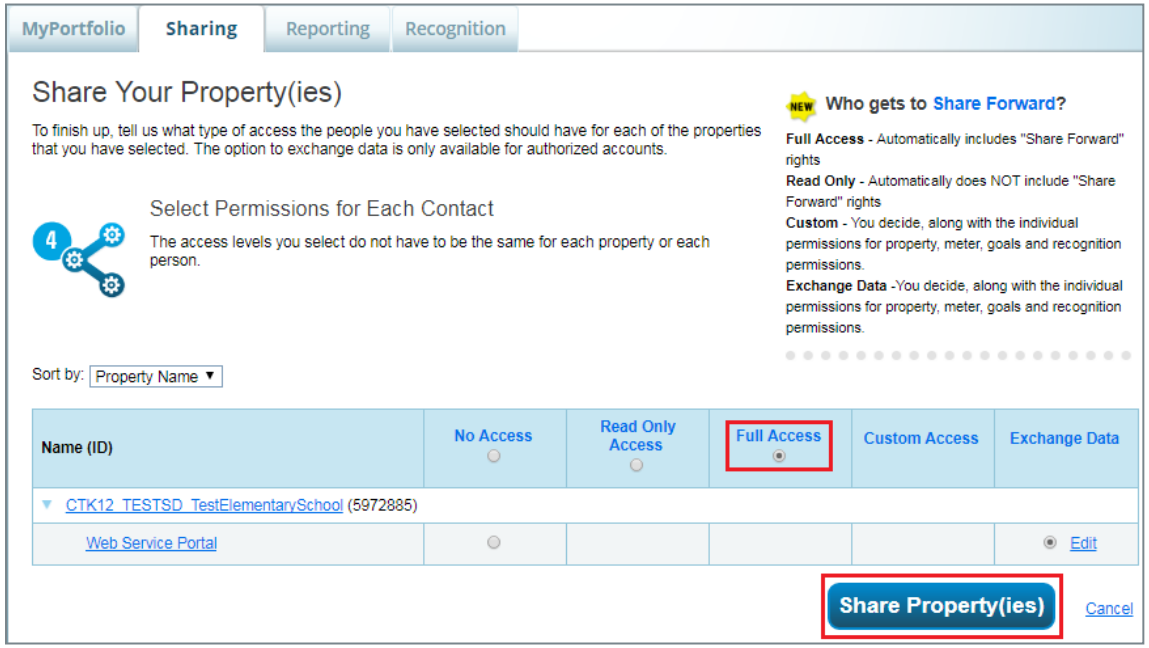
Account Verification

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



Finalize the Data Exchange

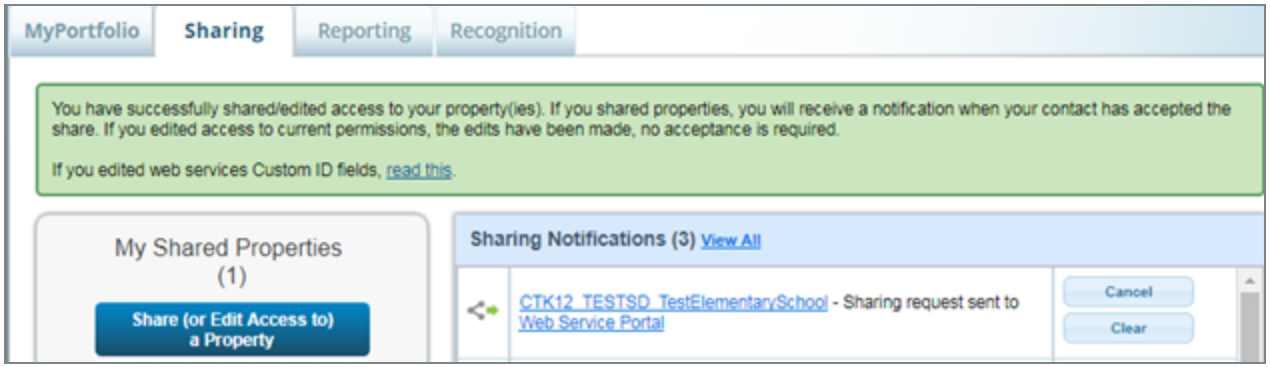
Select ***Full Access*** button and click **Share Property(ies)** to share property/meter information with the UIL web services account.



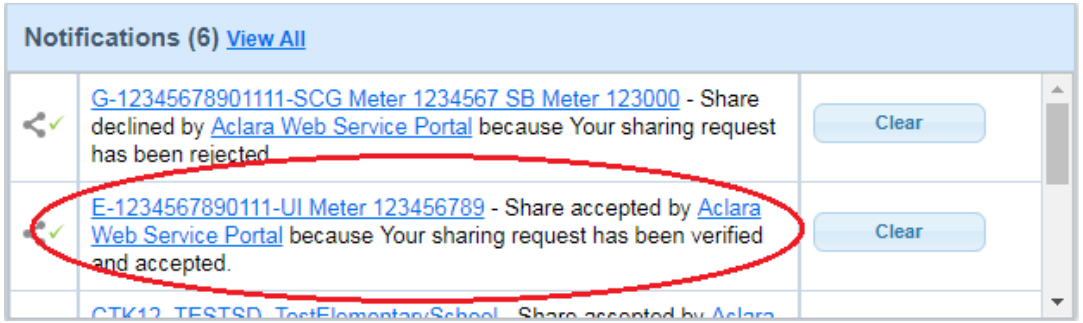
Repeat the verification steps for any other properties on your account.

Property/Meter Share Confirmation

System generates notification below confirming that the share request went through



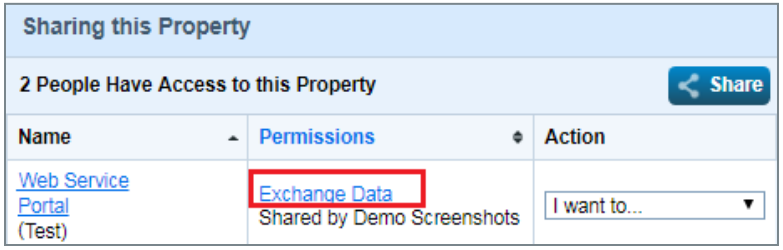
Another notification will be available in the sharing notifications section once the share request is accepted or rejected by UIL web services account



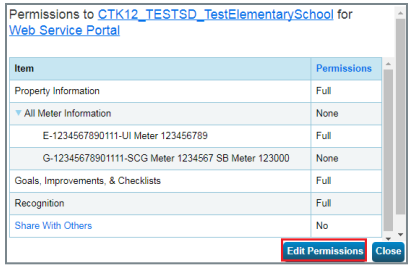
Property/Meter Resubmission (if property/meter has been denied)

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.



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



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

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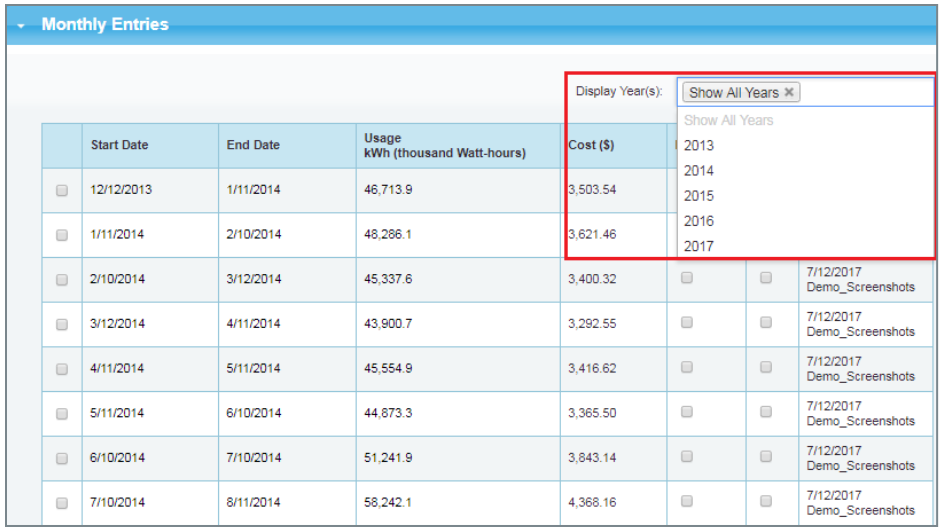
Monthly Bill Data

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'



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

Contact Information

Need Help?

Enter UIL Contact Information

Questions?
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