

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.

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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

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

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.



ENERGY STAR **PortfolioManager**[®]

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 Name Organization

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



ENERGY STAR **PortfolioManager**[®]

: [Account Settings](#) | [Notifications](#) | [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 Name Organization

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".

MyPortfolio | **Sharing** | **Reporting** | **Recognition**

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

Cheri Davis Not Available with Sacramento Municipal Utility District	Connect
Don Keefer Energy Advisor with Sacramento Municipal Utility District	Connect
Ryan Hammond Senior Energy Advisor with Sacramento Municipal Utility District (SMUD)	Connect
Sacramento Municipal Utility District SMUD Web Services with smud-electric	Connect

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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".

ENERGY STAR PortfolioManager®

Welcome EEFG_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 California Government Agency? Reply Y or N: Example: N

Terms of Use:

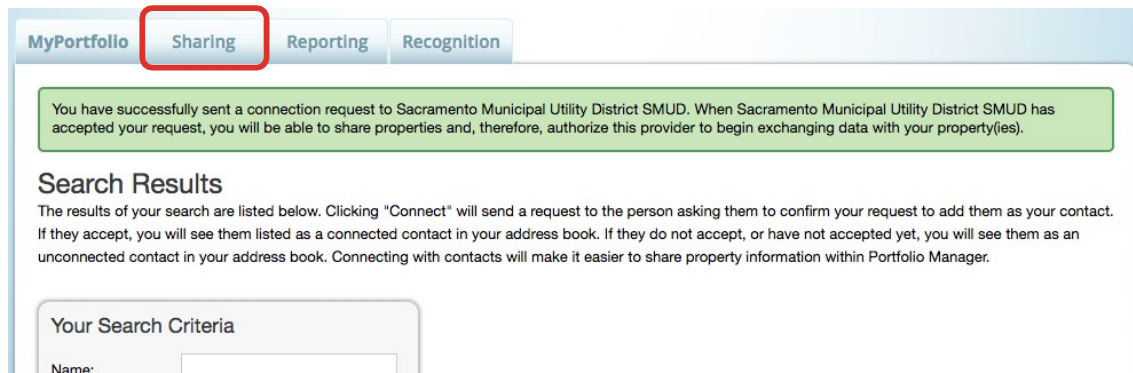
I am the owner or owner's agent or operator ("Owner") for the above referenced covered building. I wish to participate in the U.S. Environmental Protection Agency's ("EPA") national energy performance benchmarking program, an element of the ENERGY STAR program. I am or have obtained consent from, the 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 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 to have 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 [Cancel](#)

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



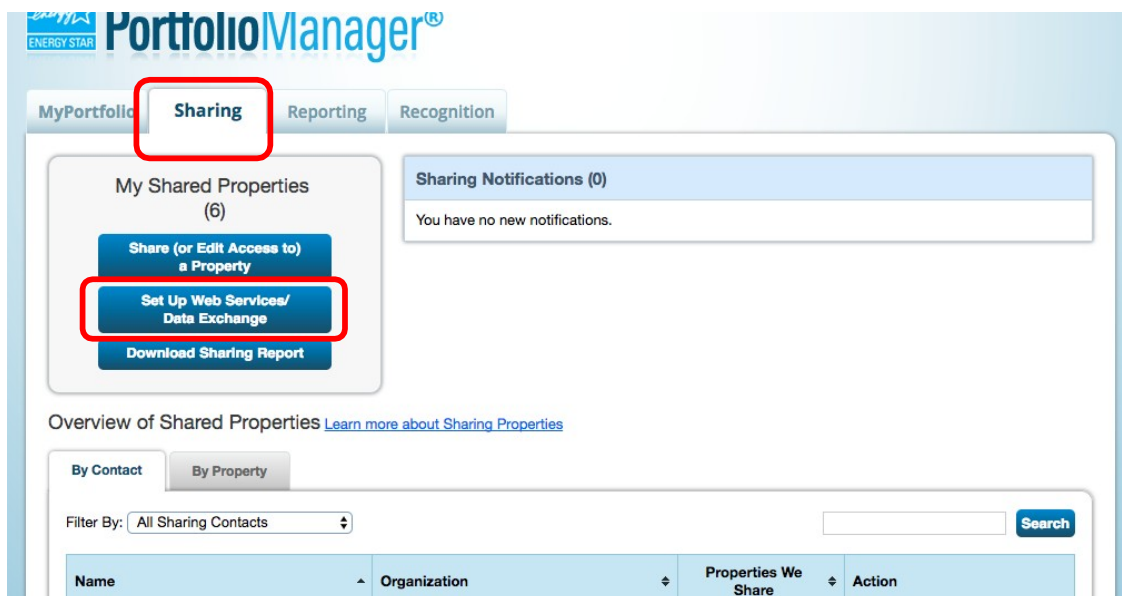
Note: You are not yet Contact Connected to SMUD. You will receive a connection Notification in Portfolio Manager when your request to connect with SMUD has been accepted. Look for Notifications in the top toolbar, next to Contacts. This process typically takes less than 24 hours.

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.

MyPortfolio | **Sharing** | Reporting | Recognition

Share Properties for Exchanging Data

Choose Permissions | Set Up Connections | Check Existing Permissions | View Results/Confirmation

Sometimes it's really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

1 **Select Web Services Provider (Account)**

Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.

Select web services provider from my contacts book:

Sacramento Municipal Utility District SM

2 **Select Properties**

Which Properties do you want to share? Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.

One Property | Demo Office Building

Choose [Permissions](#)

i Unlike "regular sharing," when you "bulk share" with a Web Service Provider, you can only pick one provider. This is because the bulk share depends on the requirements/settings of the provider.

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.

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 your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

I want to set permission levels in bulk for all selected properties and meters.

I want to provide different levels of access for each property or to each individual meter within a property.

Set Permissions [Cancel](#)

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.

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.

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:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Demo Office Building (5945543)					
Sacramento Municipal Utility District SMUD	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Share Property(ies) Cancel

For Property Information select Full Access.

Select Access Permissions to [Demo Office Building](#) for [Sacramento Municipal Utility District SMUD](#).
The following information is required by [Sacramento Municipal Utility District SMUD](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Select the permission level below that you would like to grant [Sacramento Municipal Utility District SMUD](#) for each category.

Item	None	Read Only Access	Full Access	One-Time Aggregated Energy Usage Data ¹	Account Number ²	Location Number ³
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
▼ All Meter Information						
▼ Energy Meters						
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
⊘ Natural Gas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

⊘ The provider with whom you are sharing does not support this meter type.

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.

Column 1 Column 2 Column 3

Select Access Permissions to [Demo Office Building](#) for [Sacramento Municipal Utility District SMUD](#).
 The following information is required by [Sacramento Municipal Utility District SMUD](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Select the permission level below that you would like to grant [Sacramento Municipal Utility District SMUD](#) for each category.

Item	None	Read Only Access	Full Access	One-Time Aggregated Energy Usage Data ¹	Account Number ²	Location Number ³
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
▼ All Meter Information						
▼ Energy Meters						
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="radio"/> Natural Gas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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.

Column 1 Column 2 Column 3

Select the permission level below that you would like to grant [Sacramento Municipal Utility District SMUD](#) for each category.

Item	None	Read Only Access	Full Access	One-Time Aggregated Energy Usage Data ¹	Account Number ²	Location Number ³
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
▼ All Meter Information						
▼ Energy Meters						
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	N	123456	876543
<input checked="" type="radio"/> Natural Gas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			

N Account # Location #

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.

Column 1 Column 2 Column 3

Item	None	Read Only Access	Full Access	One-Time Aggregated Energy Usage Data ¹	Account Number ²	Location Number ³
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
▼ All Meter Information						
▼ Energy Meters						
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	Y	3456789	3456789
<input checked="" type="radio"/> Natural Gas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			

Y Meter # Meter #

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.

Select Access Permissions to **Demo Office Building** for **Sacramento Municipal Utility District SMUD**.

Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
Recognition	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		

Additional Options:

Item	Yes	No
* Share Forward Allow Sacramento Municipal Utility District SMUD 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](#)

Finally, to submit your building and meter share, you must click Share Properties.

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.

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
▼ Demo Office Building (5945543)					
Sacramento Municipal Utility District SMUD	<input type="radio"/>				<input checked="" type="radio"/> Edit

Share Property(ies) [Cancel](#)

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A green banner will appear confirming your successful site and meter share with SMUD.

The screenshot shows a web interface with a navigation bar containing 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Below the navigation bar is a green success banner with the following text: '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](#).' Below the banner are two main sections. The left section, titled 'My Shared Properties (7)', contains three buttons: 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. The right section, titled 'Sharing Notifications (2) View All', contains a table with two rows of notifications. Each row has a double-headed arrow icon, a text description of the sharing request, and two buttons: 'Cancel' and 'Clear'.

Sharing Notifications (2) View All	
Electric Grid Meter - Sharing request sent to Sacramento Municipal Utility District SMUD	<input type="button" value="Cancel"/> <input type="button" value="Clear"/>
Demo Office Building - Sharing request sent to Sacramento Municipal Utility District SMUD	<input type="button" value="Cancel"/> <input type="button" value="Clear"/>

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.

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

Four Ways to Enter Bill Data

1. Manually
2. Use our [simple spreadsheet](#) (one meter) to upload or Copy/Paste
3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)
4. [Find an organization](#) to electronically enter your data into Portfolio Manager

Your Property is: [Edit](#)

- A Single Building
- Part of a Building

Energy Use by Calendar Month

Site Energy (kBu)

Apr '15 Jul '15 Oct '15 Jan '16 Apr '16 Jul '16 Oct '16 Jan '17 Apr ...

Electric - Grid

[Export Data by Calendar Month](#)

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)
Aggregated Electric Grid Meters	30676635	Electric - Grid	04/30/2017	Yes
Natural Gas	30676634	Natural Gas		Yes

Monthly Entries

Display Year(s): 2017 x

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Updated
<input type="checkbox"/>	1/1/2017	1/31/2017	821,578	85,367.29	<input type="checkbox"/>	<input type="checkbox"/>			4/24/2017 Sacramento Municipal Utility District SMUD
<input type="checkbox"/>	2/1/2017								4/24/2017 Sacramento Municipal Utility District SMUD
<input type="checkbox"/>	3/1/2017								4/24/2017 Sacramento Municipal Utility District SMUD
<input type="checkbox"/>	4/1/2017	4/30/2017	826,777	87,012.85	<input type="checkbox"/>	<input type="checkbox"/>			4/24/2017 Sacramento Municipal Utility District SMUD

Customers receive up to 24 months of historical, calendarized aggregated data.

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, reshare 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.

Summary Details Energy Water Waste & Materials Goals Design

Property Profile [\(Future enhancements\)](#)
This section will be deleted in 2018, except for the property photos which will remain. [More information.](#)
[+ Create Profile](#)

Source EUI Trend (kBtu/ft²)

Year	Source EUI (kBtu/ft ²)
2014	~120
2015	~125
2016	~130

Total GHG Emissions Trend (Metric Tons CO₂e)

Year	Total GHG Emissions (Metric Tons CO ₂ e)
2014	~230
2015	~240
2016	~250

Metrics Summary [Change Metrics](#) [Change Time Periods](#)

Metric	Feb 2015 (Energy Baseline)	Jan 2017 (Energy Current)	Change
ENERGY STAR Score (1-100)	70	72	2.00 (2.90%)
Source EUI (kBtu/ft ²)	130.4	129.4	-1.00 (-0.80%)
Site EUI (kBtu/ft ²)	42.1	41.5	-0.60 (-1.40%)
Energy Cost (\$)	181,294.29	183,013.28	1718.99 (0.90%)
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	3.2	3.1	-0.10 (-3.10%)
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Check for Possible Data Errors
Run a check for any 12-month time period to see if there are any possible errors found with your data.
[Check for Possible Errors](#)

Sharing this Property [Share](#)

More About Sharing
You haven't [shared your property](#) yet. Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)

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.

MyPortfolio **Sharing** Reporting Recognition

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:

- Roye Mbarah (royeumba)
- Ruzwa Cooper (RCCOOPER)
- Sacramento Municipal Utility District SMUD (SMUD-ELECTRIC)**
- Sam Noori (Evergood)
- Samantha Whitmore (swhitmore)
- Sameer Behere (sameer.behere)
- Samuel Herzberg (SM County Parks)
- Saul Armian (armian)
- SDGE Benchmarking (SDGE)

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.

Continue [Cancel](#)

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.

Sharing this Property

4 People Have Access to this Property [Share](#)

Name	Permissions	Action
Beth Gucciardi (BETHGUCCIARDI)	Full Access Shared by	I want to...
Pacific Gas and Electric Company (PACIFICGASELECTRIC)	Exchange Data Shared by	I want to...
	Property Data Administrator	I want to...
Sacramento Municipal Utility District SMUD (SMUD-ELECTRIC)	Exchange Data Shared by	✓ I want to... View Contact's Permissions Edit Contact's Permissions Remove Contact's Access to Property Share Properties With Contact

[Copy Property](#) [Download Property to Excel](#)

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.

Sharing this Property		
2 People Have Access to this Property		
Name	Permissions	Action
	Property Data Administrator	I want to...
Beth Gucciardi (BETHGUCCIARDI)	Full Access	I want to...

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.

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 | Demo Office Building

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:

- Roye Mbarah (royeumba)
- Ruzwa Cooper (RCCOOPER)
- Sacramento Municipal Utility District SMUD (SMUD-ELECTRIC)**
- Sam Noori (Evergood)
- Samantha Whitmore (switmore)
- Sameer Behere (sameer.behere)
- Samuel Herzberg (SM County Parks)
- Saul Arman (arman)
- SDGE Benchmarkina (SDGE)

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.

Continue Cancel

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).

The screenshot shows the "Sharing this Property" section with a table of contacts. The contact "Sacramento Municipal Utility District SMUD (SMUD-ELECTRIC)" is highlighted with a red box. To its right, an "I want to..." dropdown menu is open, with "Edit Contact's Permissions" selected and highlighted in blue. Other options in the menu include "View Contact's Permissions", "Remove Contact's Access to Property", and "Share Properties With Contact".

Name	Permissions	Action
Beth Gucciardi (BETHGUCCIARDI)	Full Access Shared by	I want to...
Sacramento Municipal Utility District SMUD (SMUD-ELECTRIC)	Exchange Data Shared by	I want to...

On the next page, click the blue word Edit, NOT the blue button.

The screenshot shows the "Edit Sharing Permissions" page. It features a table with columns for "Name (ID)", "No Access", "Read Only Access", "Full Access", "Custom Access", and "Exchange Data". The row for "Sacramento Municipal Utility District SMUD" has an "Edit" link in the "Exchange Data" column, which is circled in red and pointed to by a red arrow. Below the table are "Edit Permissions" and "Cancel" buttons. The page also includes a "Who gets to Share Forward?" section with definitions for "Full Access", "Read Only", "Custom", and "Exchange Data".

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
Sacramento Municipal Utility District SMUD	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/> Edit

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.

Select Exchange Data Access Permissions to [Demo Office Building Three](#) for [Sacramento Municipal Utility District SMUD](#).

[Sacramento Municipal Utility District SMUD](#) requires the following information in order to provide services to your property(ies). If you have any questions about how to complete this information, please contact [Sacramento Municipal Utility District SMUD](#).

Please select the permission level you would like to grant [Sacramento Municipal Utility District SMUD](#) for [Demo Office Building Three](#) for each category. If "None" is selected for all items, [Sacramento Municipal Utility District SMUD](#) will not receive any access to this property.

Item	None	Read Only Access	Full Access	One-Time Aggregated Energy Usage Data ¹	Account Number ²	Location Number ³
Property Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
▼ All Meter Information						
00000001	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text" value="N"/>	<input type="text" value="1231456"/>	<input type="text" value="12345"/>
District Steam	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Goals, Improvements & ...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			

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

Select Exchange Data Access Permissions to [Demo Office Building Three](#) for [Sacramento Municipal Utility District SMUD](#).

[Sacramento Municipal Utility District SMUD](#) requires the following information in order to provide services to your property(ies). If you have any questions about how to complete this information, please contact [Sacramento Municipal Utility District SMUD](#).

Please select the permission level you would like to grant [Sacramento Municipal Utility District SMUD](#) for [Demo Office Building Three](#) for each category. If "None" is selected for all items, [Sacramento Municipal Utility District SMUD](#) will not receive any access to this property.

Item	None	Read Only Access	Full Access	One-Time Aggregated Energy Usage Data ¹	Account Number ²	Location Number ³
Property Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
▼ All Meter Information						
00000001	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="N"/>	<input type="text" value="1231456"/>	<input type="text" value="12345"/>
District Steam	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Goals, Improvements & ...	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			

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?

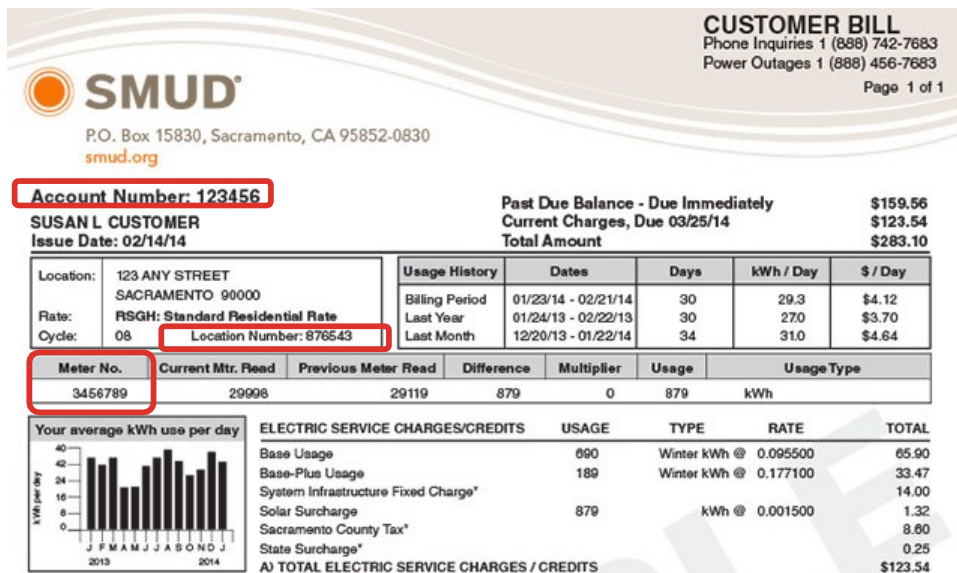
A – Most building owners or property managers have access to the meters at their site. Refer to the instructions for requesting Aggregated data on page 10 of this Guide. You will only need one Meter Number for each Location Number at the site. Buildings with multiple addresses often have more than one 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 with 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?

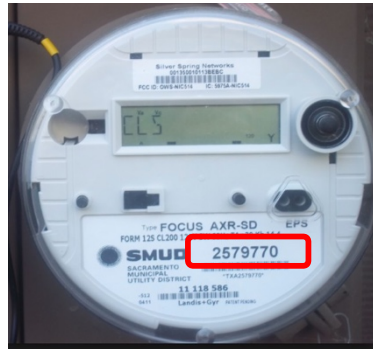
A – To find out how many Location Numbers are associated with your building, use the following procedure to request help from SMUD. Write to benchmark@smud.org and provide a list of addresses at the site. For every address associated with your property, please specify a full postal address, including 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.



A2 - For Property Owners: The Meter Number is likely more accessible for you. Record the Meter Numbers found on the physical meters located at your property, referencing the image 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?

A - 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:

- SMUD’s Business web page: <https://www.smud.org/en/business/save-energy/>
- SMUD’s Rebates, Financing, and Incentives page: <https://www.smud.org/en/Business-Solutions-and-Rebates/Manage-My-Energy>

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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