



Energy Data Portal User Guide

For CenterPoint Energy Customers

Process Overview

A high-level overview of the steps in the process covered in depth in this User Guide.

In ENERGY STAR Portfolio Manager®

If you do not want to Benchmark your buildings, skip this.

1. Set up your property in ENERGY STAR Portfolio Manager®.
2. Add CenterPoint Energy Web Services as a contact.
3. Share your ENERGY STAR Portfolio Manager® property with CenterPoint Energy Web Services.
4. Note your ENERGY STAR Portfolio Manager® property IDs for each building.

In Energy Data Portal

1. Register and add all of your CenterPoint Energy Accounts.
2. Create your Energy Data Portal property.
3. View your building's energy use data.
4. Send your building's energy use data to ENERGY STAR Portfolio Manager®.

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Need support? Help is available! Please contact energydataportal@centerpointenergy.com with any questions you have as you go through this User Guide and as you prepare your property, add accounts, and create and use your Energy Data Portal.

Step 1: Prepare your property in ENERGY STAR Portfolio Manager® (if you do not want to benchmark using ENERGY STAR Portfolio Manager®, skip to Step 2)

Step 1.1 Log in to ENERGY STAR Portfolio Manager

- Login or create a new account at <https://portfoliomanager.energystar.gov/pm>

Step 1.2 Create your property in ENERGY STAR Portfolio Manager®

- If you have not previously benchmarked, set up your property in ENERGY STAR Portfolio Manager®. Instructions for this can be found at https://www.energystar.gov/buildings/tools-and-resources/how_set_your_property_portfolio_manager.
- You do NOT need to set up gas meters as these will be automatically created when you send the data to ENERGY STAR Portfolio Manager®.

Step 1.3 Add CenterPoint as a contact

- If this is your first time benchmarking with CenterPoint, add CenterPoint as a contact. You will only need to do this once. If you have previously completed this step, skip to Step 1.4.

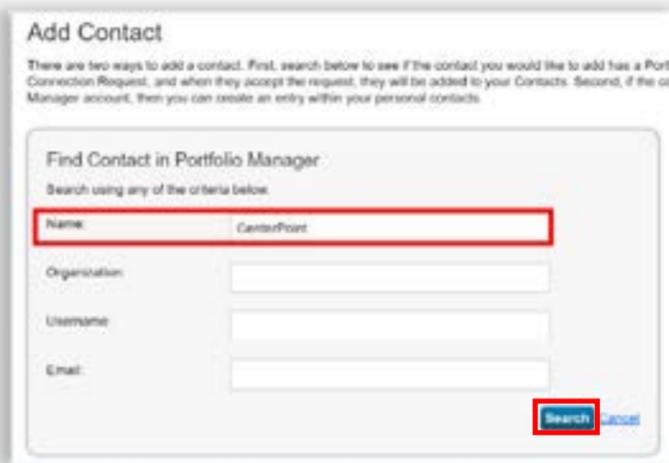


From the home screen in ENERGY STAR® Portfolio Manager® go to the top right corner and:

- Click on the “Contacts” link, and a new screen called “My Contacts” will appear.

On the “My Contacts” screen:

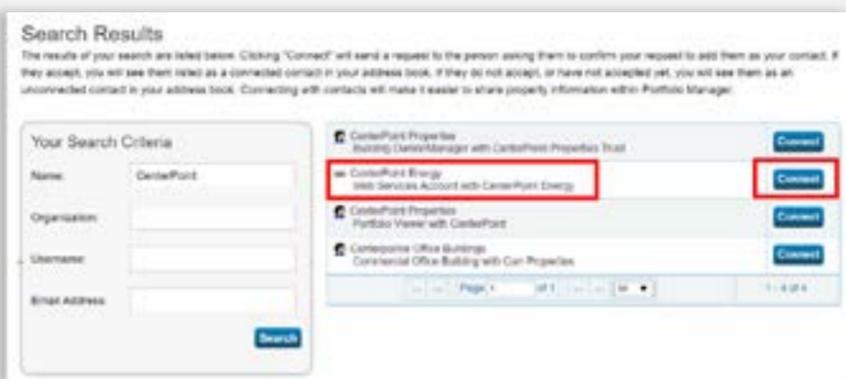
- Click on the blue “Add Contact” button to prompt the next overlay to appear.



On the “Add Contact” overlay screen:

- Search for CenterPoint by typing it into the “Name:” field.

Click the blue “Search” button to prompt the next screen to appear.



On the “Search Results” screen:

- Click on the blue “Connect” button on the right of the **“CenterPoint Energy Web Services Account with CenterPoint Energy”** to connect you with Energy Data Portal.

This will prompt a new screen to pop up to send the connection request.



On the “Send Connection Request” screen, send a connection request:

- Check the check box for the Terms of Use Agreement, and
- Click on the blue “Send Connection Request” button.



From here, Energy Data Portal will accept the connection and you will receive a notification (example shown at left) which states: “You are connected to Energy Data Portal web portal from CenterPoint Energy”.

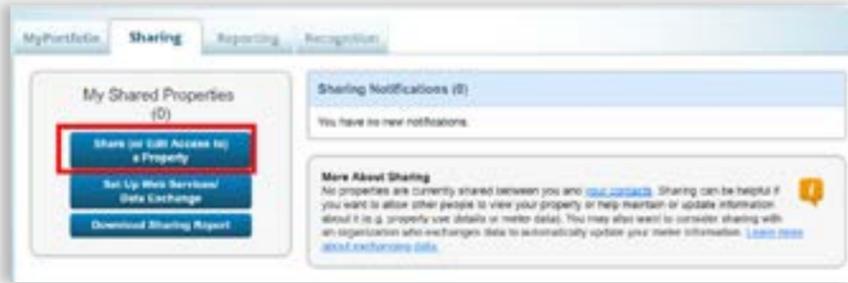
Please allow up to 24 hours for your request to be accepted. You will have to wait for the connection to be accepted before completing Step 1.4.

Please note: As you go through the process, if you have any questions, contact an Energy Data Portal Team member at energydataportal@centerpointenergy.com. And, be sure to always check your data to ensure it appears as it should.

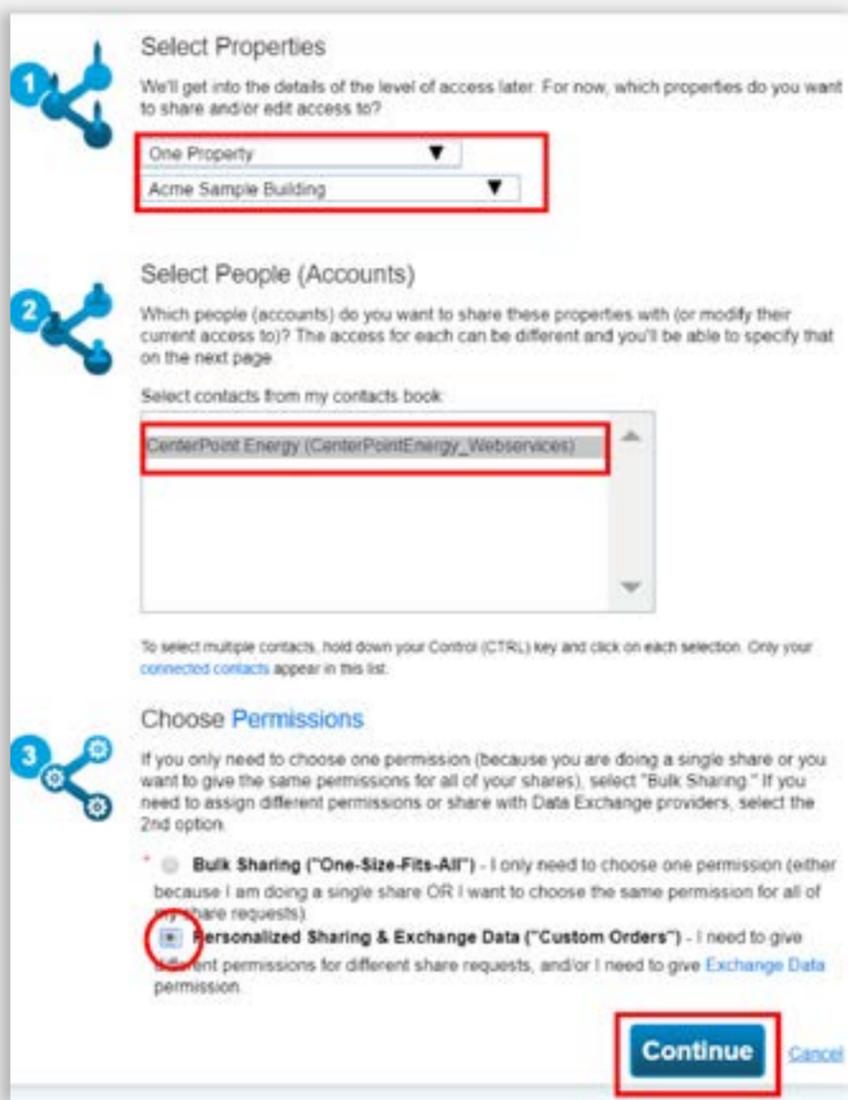
Need support? Help is available! Please contact energydataportal@centerpointenergy.com with any questions you have as you go through this User Guide and as you prepare your property/properties, add accounts, and create and use your Energy Data Portal.

Step 1.4 Share your property with CenterPoint Energy

To share data with Energy Data Portal, go to the home screen in ENERGY STAR Portfolio Manager® and click on the “Sharing” tab and then click on the blue “Share (or Edit Access to) a Property” button, shown below:



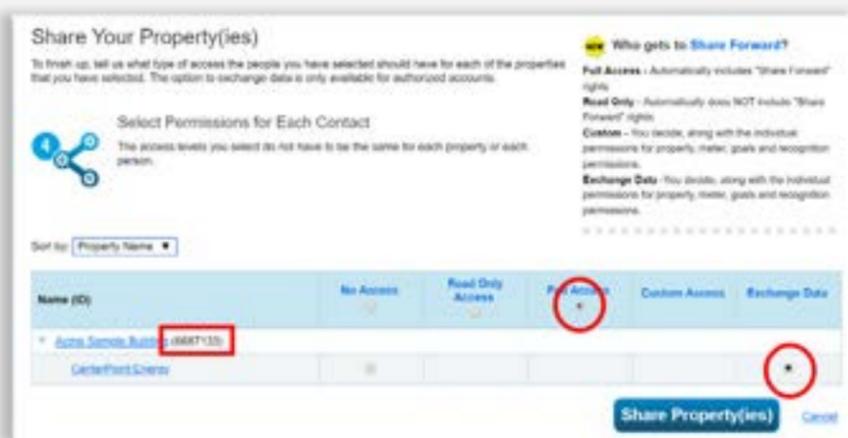
When you click on the blue “Share (or Edit Access to) a Property” button, a new screen titled “Select Properties” will appear that will allow you to select which properties to share.



To select the properties:

- First, under “Select Properties”, use the drop down menu to select your property.
- Next, under “Select People (Accounts)”, select “CenterPoint Energy (CenterPointEnergy_Webservices).”
- Then, under “Choose Permissions”, mark the “Personalized Sharing & Exchange Data (“Custom Orders”)” radio button, and then click the blue “Continue” button.

When you click on the blue “Continue” button, a new overlay will appear.



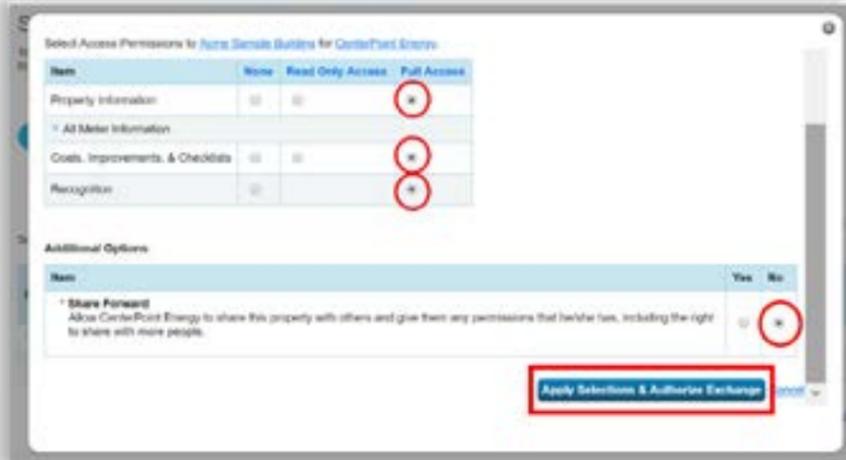
On the “Share Your Property screen:

- Take note of the number in parentheses next to your building name - shown at left with a red rectangle border - this is your Portfolio Manager Property ID.
- Mark both the “Full Access” and “Exchange Data” radio buttons.
- Click the blue “Share Property” button to prompt the next overlay to appear.

Please note: As you go through the process, if you have any questions, contact an Energy Data Portal Team member at energydataportal@centerpointenergy.com. And, be sure to always check your data to ensure it appears as it should.

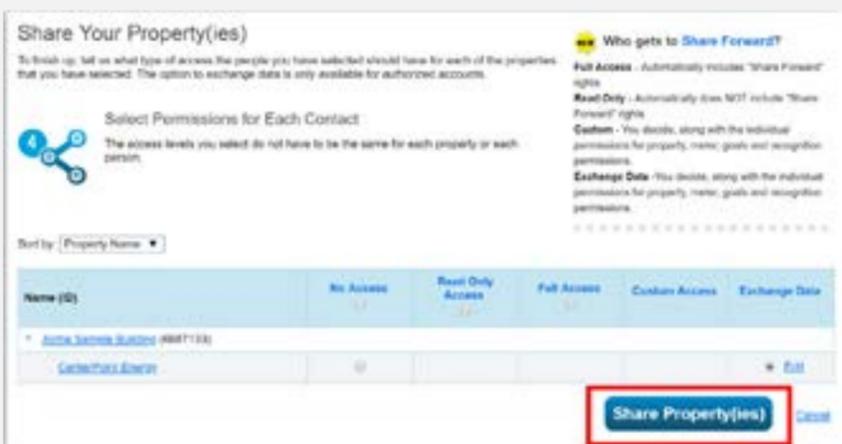
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Step 1.4 Share your property with CenterPoint Energy (continued)

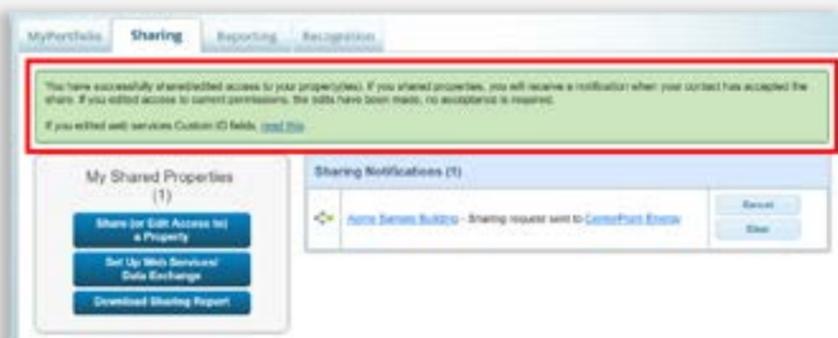


On this “Select Access Permissions” overlay:

- Mark the “Full Access” radio buttons for all of the items in the top table.
- Please note: Under “Additional Options”, you do not need to need to grant Energy Data Portal access to “Share Forward”.
- Click the blue “Apply Selections & Authorize Exchange” button to accept the access permissions you just set and to close the overlay.



You are now back on the “Share Your Property” screen, where you will select the blue “Share Property” button on the bottom of the screen.



The next screen (example shown at left) appears, under the “Sharing” tab. You will see a message in a green box confirming that your property was successfully shared.

You do NOT need to wait for the property share request to be accepted; you can move on immediately to the next step and your share request will be accepted automatically when you establish automated benchmarking from the Energy Data Portal.

Energy Data Portal User Guide

For CenterPoint Energy Customers

Need support? Help is available! Please contact energydataportal@centerpointenergy.com with any questions you have as you go through this User Guide and as you prepare your property/properties, add accounts, and create and use your Energy Data Portal.

Step 2: Add all of your CenterPoint accounts associated with the property

Step 2.1 Organize your CenterPoint account information

- Gather all of the CenterPoint Energy bills that you pay for the property.
- Make sure you gather bills for *all commercial* accounts relevant to the building(s) you are benchmarking. Customers with a large portfolio of many buildings or many accounts may want to map or group all of your accounts and meters to buildings, as the first step.



Using the guide below, take note of your account authentication information:

- Account Number
- Street Number
- Specific Customer Name

First, identify which bill type you are viewing, then follow the instructions for that type of bill. Note that if you receive multiple bills from CenterPoint Energy, you may receive one or both bill types, depending on the account.

Note: The system does not allow for authentication with residential unit accounts. Owners of apartment buildings do not need to gather bills for each apartment unit.

Single Account Bill

ACCOUNT NUMBER

If you receive a summary bill with **multiple accounts**, select the listed account for the service location you would like to authenticate. **IMPORTANT - Do not use the account number listed at the top of the bill (noted here with a red X). This will not connect correctly in the Energy Data Portal.**

If you receive a bill with a **single account**, use the account number listed at the top of the bill for registration.

IMPORTANT - Only enter the numbers before the dash, not the dash or the number after it.

STREET NUMBER

If you receive a summary bill with **multiple accounts**, use the street number from the service address affiliated with the account number selected from the list of accounts.

IMPORTANT - Do not use the street number/service address listed in the mailing address. This may not connect correctly in the Energy Data Portal Tool.

If you receive a bill with a **single account**, use the street number listed in the service address at the top of the bill.

IMPORTANT - Do not use the service address listed in the mailing address. This may not connect correctly in the Energy Data Portal Tool.

CUSTOMER NAME

If you receive a summary bill with **multiple accounts**, use the account name listed in the mailing address on the bill.

IMPORTANT - If the customer name appears in two separate lines, use the top line only.

If you receive a bill with a **single account**, use the Customer Name listed in the mailing address.

IMPORTANT - If the customer name appears in two separate lines, use the top line only.

Multiple Accounts Summary Bill

ACCOUNT NUMBER	ACCOUNT NAME	SERVICE ADDRESS	BILLING PERIOD	USAGE	CURRENT CHARGES
1 9909101	ACME	1234 Main Street Isle, MN56342	05/02/09 - 05/31/09	0 THM	\$15.98
2 9909108	ACME DATA	5432 Smith Parkway Isle, MN 56342	05/02/09 - 05/31/09	8 THM	21.78
3 9909099	ACME DANCE COMPANY	86753 Jones Road Isle, MN 56342	05/02/09 - 05/31/09	140 THM	126.57
4 5151515	ACME INSTITUTE	100 Broadway Isle, MN 56342	05/02/09 - 05/31/09	23 THM	60.72
5 9911990	ACME DANCE COMPANY	86753 Jones Road Isle, MN 56342	05/02/09 - 05/31/09	1031 THM	587.65
6 8675309	JENNY	1427 Paradise Highway Isle, MN 56342	05/02/09 - 05/31/09	45 THM	48.96
7 1234567	ACME DESIGNS	8887 E Blanco Blvd Isle, MN 56342	05/02/09 - 05/31/09	46 THM	72.71
8 3216548	YANNY AND LAUREL	20002 W Whidway Ave Isle, MN 56342	05/02/09 - 05/31/09	216 THM	161.60

Please note: As you go through the process, if you have any questions, contact an Energy Data Portal Team member at energydataportal@centerpointenergy.com. And, be sure to always check your data to ensure it appears as it should.

Need support? Help is available! Please contact energydataportal@centerpointenergy.com with any questions you have as you go through this User Guide and as you prepare your property/properties, add accounts, and create and use your Energy Data Portal.

Step 2.2 Register for Energy Data Portal

- If this is your first time using Energy Data Portal, you will need to register using information from your CenterPoint Energy Bill. You can use any of your CenterPoint Energy accounts to register; you will be able to add additional accounts in Step 2.3.



Energy Data Portal:
CenterPointEnergy.com/EnergyDataPortal

- Click on “Register”

Street Number From CenterPoint Energy Bill, see instructions above

Customer Name From CenterPoint Energy Bill, see instructions above

User First Name First Name

User Last Name Last Name

Account Number From CenterPoint Energy Bill, see instructions above

Email Address name@domain.com

- Fill out all registration fields, taking care to follow the special instructions for the fields marked in red in the image to the left, (which require specific information from your bill).

Street Number: Enter ONLY the numeric digits at the start of service address, no other text (Example: Enter 123 for service address 123 Main Street)

Customer Name: Enter exact text from bill shown on the first line of the to: address – see bill examples on previous page.

Account Number: DO NOT enter the dash or number after the dash (Example: Enter 123456 for Account Number 123456-7)

Upon successful registration, your account’s energy use data will be displayed.



Step 2.3 Add all relevant CenterPoint Energy accounts

- Before you set up your property, add all CenterPoint Energy accounts associated with the building. This is ONLY for accounts that you pay the bill for. Tenant accounts do not need to be added.



Note: If you do not see this “Authenticate Now” button, click on the gear symbol on any of the widgets to display all available widgets, and select the “Authenticate Now” widget.

- Click on “Authenticate Now” under “Add Additional account/properties”.

- On Connect Additional CenterPoint Energy Account overlay, enter required information, making sure you follow special instructions in red below.

Connect Additional CenterPoint Energy Account

Name on Account: From Bill

Street Number: From CenterPoint Energy Bill, see instructions above

Account Number: From CenterPoint Energy Bill, see instructions above

Add Account

Name on Account: Enter exact text from bill shown on the first line of the to: address – see bill examples on previous page.

Street Number: Enter ONLY the numeric digits at the start of service address, no other text (Example: Enter 123 for service address 123 Main Street)

Account Number: DO NOT enter the dash or number after the dash (Example: Enter 123456 for Account Number 123456-7)

Depending on how your accounts were set up with CenterPoint Energy, some or all of your other accounts may already appear in the authenticated accounts list. Similarly, authenticating a single account may add one or more additional accounts.

The Energy Data Portal recognizes authentication for all accounts under one CenterPoint Energy “customer”. If all of your accounts were set up under the same customer, your additional accounts may already be added. The best way to ensure that all relevant accounts are linked is to work through them one by one as you are setting up your property.

Please note: As you go through the process, if you have any questions, contact an Energy Data Portal Team member at energydataportal@centerpointenergy.com. And, be sure to always check your data to ensure it appears as it should.

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Step 3: Create your Energy Data Portal Property

Step 3.1 Assemble and name your property

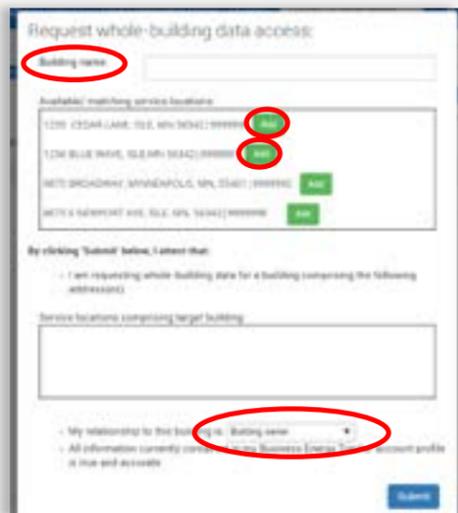
- Energy Data Portal allows for two options to assemble your property - Simplified and Detailed, both laid out below.

Option 1 - SIMPLIFIED WHOLE -BUILDING BENCHMARKING

(RECOMMENDED – this is best for most users who simply want to understand their building’s total energy use and requires the least maintenance for on-going benchmarking). *Note: Whole building data will transfer aggregated energy use data for all meters at the selected service address(es) - including any tenant meters - and is the simplest approach for accessing data for the purposes of benchmarking ordinance compliance.*



- Click on the “Initiate Request” button from the “Request whole-building data” widget.



- On the “Request whole-building data access” form, you will:
 - Assign a name in the “Building Name” field.
 - Click “Add” for ALL RELEVANT service addresses from the “Available/ matching service locations” list.
 - Confirm your relationship with the building and click “Submit”.
 - On the next screen, confirm that the number of units/meters displayed is consistent with your expectations. Important for multi-family buildings and commercial real estate with multiple tenants: For this verification step, consider how units are metered. Does each unit have its own gas meter, or is there a master account/house meter(s) for the entire building? Make sure that all expected meters are accounted for in the confirmation list. (If not, click “Back” and make sure that all relevant service addresses are selected, then click “Submit”).

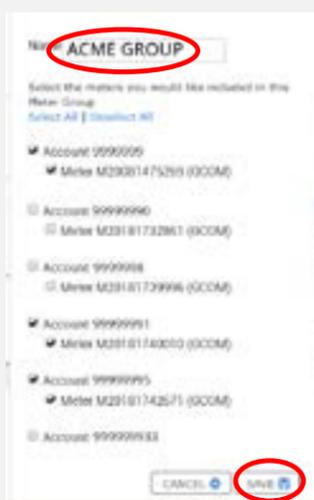
Note: This step is especially important for buildings with commercial/retail tenants that may have their own distinct service address. If you do not see all required addresses, please contact energydataportal@centerpointenergy.com for assistance in locating all meters at the building.

Option 2 - DETAILED METER LEVEL DATA

(Choose this option only if you wish to have detailed energy use for each of your building’s’ meters, rather than aggregated totals for your buildings. This option should only be used if you pay all of the CenterPoint Energy Bill(s) for your building, and want to track energy use data individually for each meter. This option can require more on-going maintenance. This option can also be used to create customized grouping of accounts, such as a grouping of all accounts at a campus of buildings, or a grouping of all accounts to track total energy use.)



- Create New Meter Groups
 - Determine which accounts are relevant to your building or customized grouping of accounts, and note each account number/meter number.
 - Click on “Select Property”.
 - Click on “Add New+”.
 - Enter a name for the building or grouping of accounts.
 - Select applicable accounts.



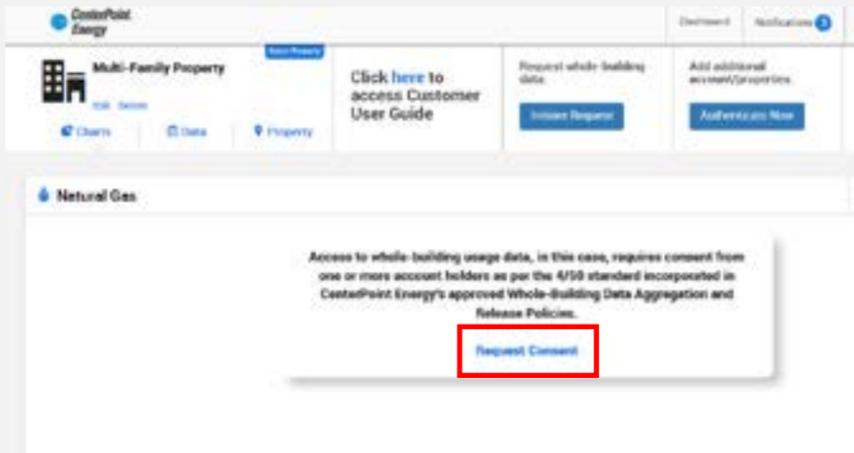
- Click “Save” at the bottom of the account listings to create the new meter group and return to dashboard access displaying multiple accounts and associated meters together.

Please note: As you go through the process, if you have any questions, contact an Energy Data Portal Team member at energydataportal@centerpointenergy.com. And, be sure to always check your data to ensure it appears as it should.

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Step 3.2 Tenant Consent Process (if required)

- Energy Data Portal will evaluate whether Tenant Consent is required, as specified by CenterPoint Energy privacy policies.
- If you do not need tenant consent, your energy use will display, and you can skip to Step 5.
- If consent is required you will see the message below.



- Click “Request Consent” to display the address(es) that require consent from its CenterPoint Energy account-holder. You will need the email address for this tenant.

Unit/Suite/Apartment numbers will be shown if they are available in the CenterPoint Energy system. If unit numbers do not appear, or you do not recognize the unit numbers presented, please email us at energydataportal@centerpointenergy.com to request assistance with identifying the tenant(s) from whom consent is required.



For each unit/suite shown:

- Click “Request Consent” and fill out the form - all fields are required.

The form contains the following fields: Tenant Email, Tenant First Name, Tenant Last Name, Organization/Trade Name, Title, First Name, Last Name, Physical and Mailing Address, Phone, and Email. At the bottom, there is a blue button labeled 'Send Request' highlighted with a red box, and a 'Close' button next to it.

- Click “Send Request” to initiate a system-generated email that will provide information and instructions to the tenant contact(s) at the email address you provide.

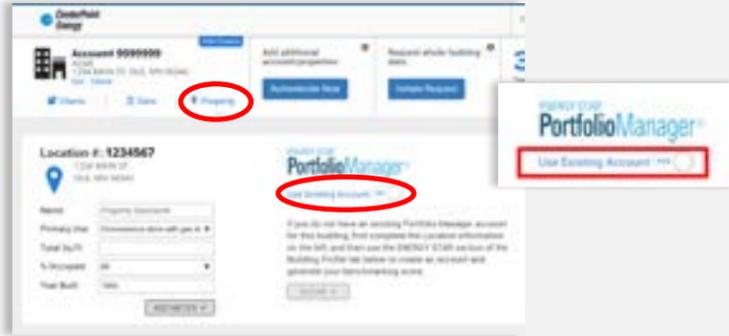
You will also be copied on this email and can forward it on to a different contact if necessary.

Upon successful completion of each tenant contact’s authorization, you’ll receive an email notification. Once all consent has been received, your energy use data becomes available and you can proceed with the next steps in this guide.

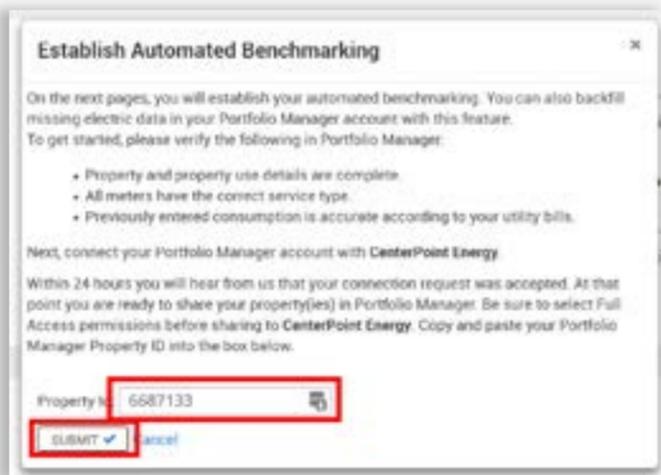
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Step 4: Send your Property Energy Use Data to ENERGY STAR Portfolio Manager®

Step 4.1 Establish the connection between Energy Data Portal and ENERGY STAR Portfolio Manager®



- Click “Select Property” and select your newly-created property whose data you would like to send to Portfolio Manager.
- Click on the “Property” dashboard tab
- Toggle the “Use Existing Account” slider in the middle of the dashboard to view the “Establish Automated Benchmarking” overlay.



- On the “Establish Automated Benchmarking” overlay, enter your existing building’s **Portfolio Manager Property ID** and click the “Submit” button to initiate the matching process.



When the Property is found, a separate a separate “ENERGY STAR Portfolio Manager®” confirmation overlay with the Property Id, Name, Address and end use information will display.

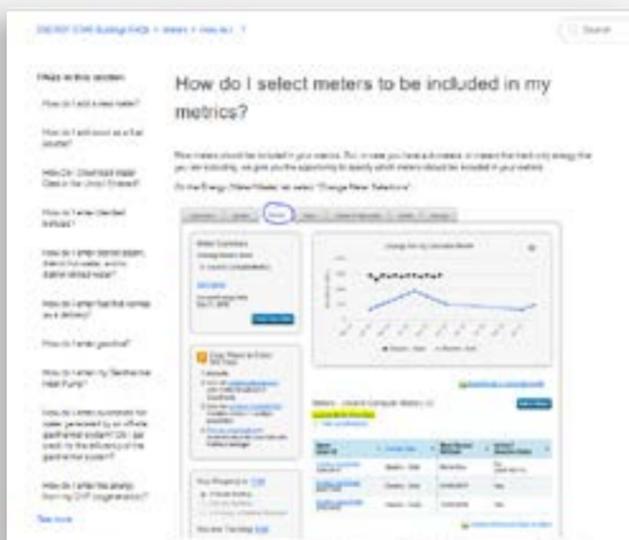
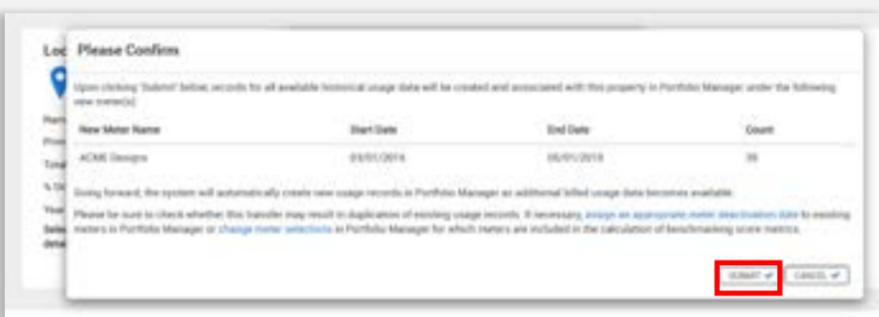
- Click the “Yes” button to confirm and initiate the confirmation process.

The “Please Confirm” confirmation overlay will identify the new meter name, and the count of usage records to be transferred, including the start and end date.

- Click the “Submit” button to complete the process and execute usage data transfer to Portfolio Manager. **PLEASE BE PATIENT AS THE DATA TRANSFERS AND DO NOT REFRESH YOUR SCREEN, EVEN IF THE SCREEN APPEARS TO BE FROZEN.** Depending on the size of your building, the transfer process make take up to 10 minutes.

Note: Please check in ENERGY STAR Portfolio Manager® that the data has been transferred and ensure that the meter is included in your building’s Energy Star score metrics.

Visit: <https://portfoliomanager.zendesk.com/hc/en-us/articles/211697387-How-do-I-select-meters-to-be-included-in-my-metrics->



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Step 4.2 Account for any Existing Energy Use Data in ENERGY STAR Portfolio Manager®

- IF YOU ARE SWITCHING to Energy Data Portal (from a previous method of benchmarking): Adjust for any existing energy use data.
- The Energy Data Portal will transfer all available usage history going back to April of 2016. The system will not account for any historical individual meter data that is already present for the building in ENERGY STAR Portfolio Manager®. In order to avoid double counting usage when converting to using whole building data, and adverse/inaccurate impacts on your ENERGY STAR Portfolio Manager® score, you will need to set a deactivation date for each historical individual meter to correspond with the beginning month date for the usage data series for the new meter that is connected to Energy Data Portal.

To set the individual meter deactivation dates, for each individual meter:

- From your building's Property page, navigate to the Energy tab
- Click on the meter you'd like to deactivate, which takes you to its Basic Meter Information page

Here, expand the "Basic Meter Information" bar and:

- Uncheck the "Still in Use" box found underneath the "Date Meter became Active"
- Enter 4/1/2016 for the "Date Meter became Inactive", then Click "Save Changes".

More information can be found at: <https://portfoliomanager.zendesk.com/hc/en-us/articles/211027748-How-do-I-deactivate-a-meter->

