![CenterPoint Energy logo]

Energy Data Portal Benchmarking User Guide

For CenterPoint Energy Customers

Automated Benchmarking Process Overview:

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

Step 1
In ENERGY STAR Portfolio Manager® (ESPM)

Prepare your ESPM property
- Create your ESPM property

Step 2:
In Energy Data Portal (EDP)

Register your EDP user and link all accounts
- Register for EDP
- Add all CenterPoint accounts that YOU pay for your building

Step 3:
In EDP

Create property
- Request whole-building data (if applicable)
- Verify that the correct number of meters are present
- If necessary, request required additional authorizations

Step 4:
In EDP

Send Data from EDP to ESPM
- Complete Contact connection with CenterPoint Energy Web Services
- Enable property sharing for Data Exchange
- Link your EDP buildings with ESPM Building IDs
- Confirm usage data transfer

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Step **1**: Prepare your property in ENERGY STAR Portfolio Manager®

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 can be found at:

https://www.energystar.gov/buildings/tools-and-resources/how_set_your_property_portfolio_manager

Helpful Hint - 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®.
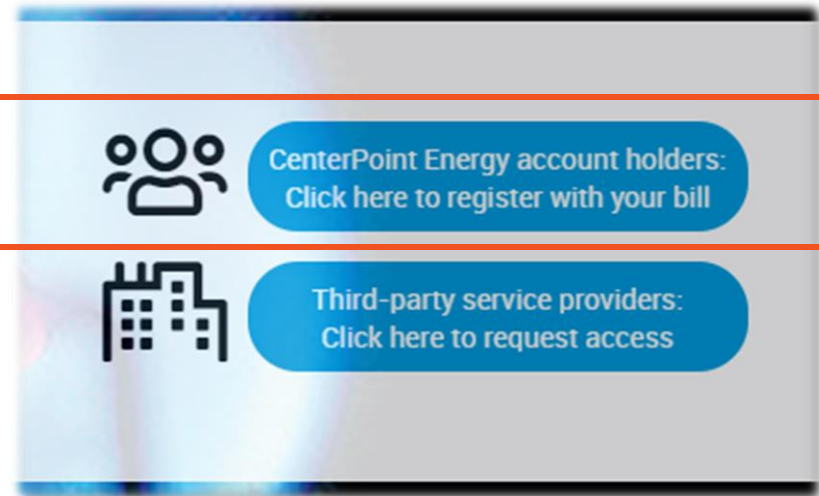
Step 2: Register your EDP user and link all accounts

Step 2.1 Access the EDP here:
https://energydataportal.centerpointenergy.com/

2.1.1 Select registration link:

- Click the option to register with your CenterPoint Energy account

- Note: If you do not pay any CenterPoint Energy bills at this property, please contact us for assistance at:
  cnpbenchmarking@icf.com

CenterPoint Energy account holders:
Click here to register with your bill

Third-party service providers:
Click here to request access

Step 2.2 Register to use the EDP

- Use your commercial CenterPoint Energy bill and an email address to register for the EDP
- Gather the CenterPoint Energy bills that you pay for the property

Helpful Hint – Pick any of your commercial bills, you can add more later.

DO NOT use individual apartment unit or residential accounts to register; use commercial or common/house meter accounts.

DO organize large building portfolios by matching accounts and meters to specific properties.

- Use the following from your bill to register to use the EDP
- See the following pages for guidance and special instructions on locating required information for the registration form fields:

  - **ACCOUNT NUMBER**

  - **STREET NUMBER (from your Street Address)**

  - **CUSTOMER NAME**

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*

WHAT TYPE OF BILL DO I HAVE?

Single Account Bill ➔ *Use Next Page*   *Multiple Accounts Summary Bill* ➔ *Use Page 8*

If only one account appears on each bill: SEE NEXT PAGE OF THIS DOCUMENT

If multiple account numbers appear on one bill: SEE PAGE 8 OF THIS DOCUMENT

- Look at the first page of your bill to determine which type you have
- Then, use the Single Account Bill Guide (next page) or a Multiple Accounts Bill Guide (Page 8) to find the information required to register for an EDP account

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Single Account Bill

STREET NUMBER

Use the **street number** listed in the service address at the top of the bill.

Helpful Hint - Do not enter the street name, only the numbers. E.g. enter only "311" if your address is 311 Walnut St.

Do not use the address listed in the mailing address (noted below with a red **X**). This number may cause an error in the Energy Data Portal Tool.

ACCOUNT NUMBER

Use the account number listed at the top of the bill for registration.

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

CUSTOMER NAME

Use the Customer Name listed in the mailing address.

Helpful Hint - **Use the top line only**, if the customer name appears in two separate lines.

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Multiple Accounts Summary Bill

ACCOUNT NUMBER

Use the listed account for the service location you would like to register.

Helpful Hint- Do not use the account number listed at the top of the bill (noted at right with a red **X**). This number may cause an error in the Energy Data Portal Tool.

CUSTOMER NAME

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

Helpful Hint - **Use the top line only,** if the customer name appears in two separate lines.

STREET NUMBER

Use the street number from the service address affiliated with the account number selected from the list of accounts.

Helpful Hint – Do not enter the street name, only the numbers. E.g. enter only "1234" if your address is 1234 Main Street.

Do not use the street number/service address listed in the mailing address (noted at left with a red **X**). This number may cause an error in the Energy Data Portal Tool.

Step 2.3 Get oriented to the EDP Dashboard
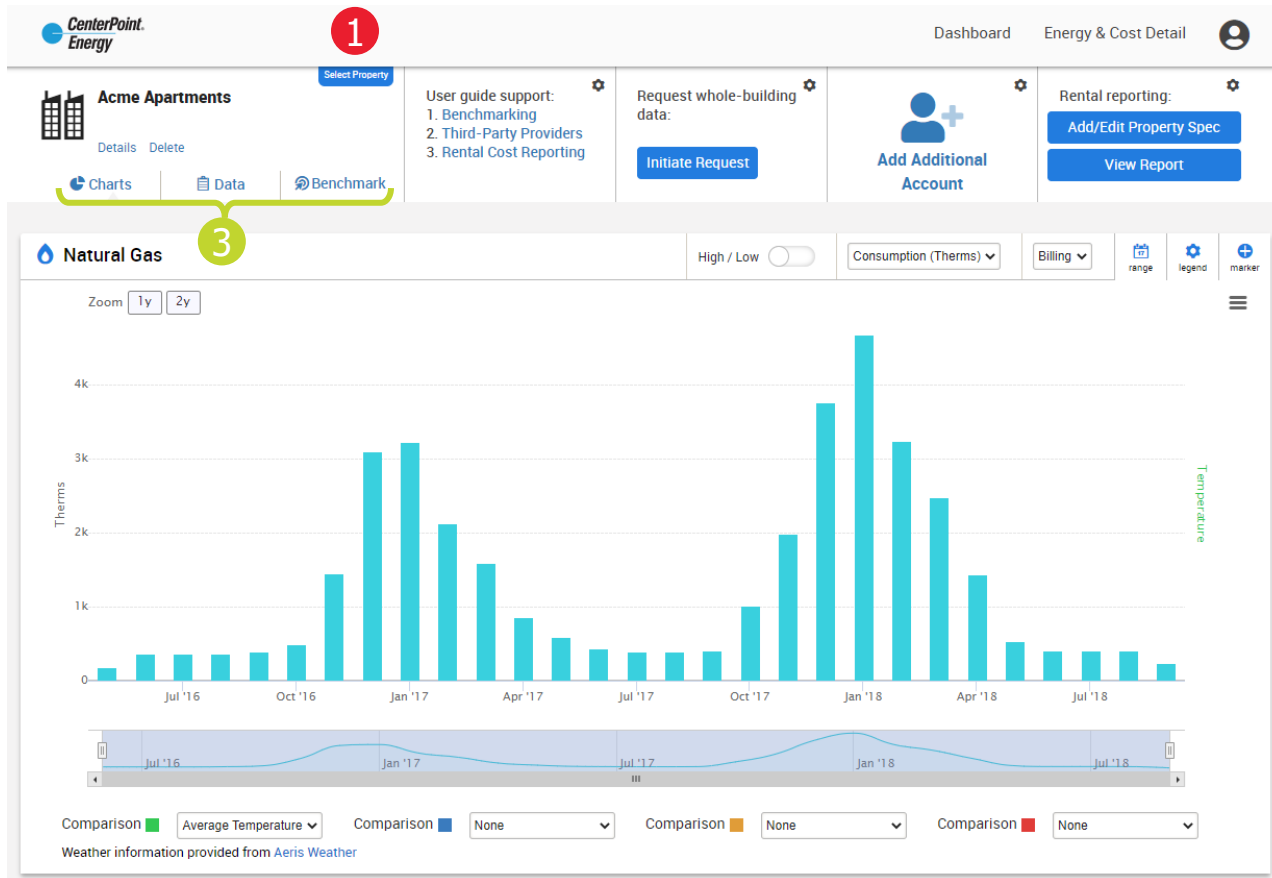
1 • Use 'Select Property' drop down control to select and view properties and accounts

2 • Use Widget panels to add accounts, request whole-building data and initiate rental cost reporting access

3 • Toggle between Charts (usage presentation), Data (data, download) and Benchmark (ENERGY STAR benchmarking) dashboard pages

4 • Use charting and data dashboard pages to visualize/explore usage and cost trends and make comparisons to weather variables and historical usage

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Step 2.4 Add additional accounts (if applicable)

- If you are the account holder for more than one natural gas commercial meter at a property (i.e., house or common meters), follow the directions to add the account information to the property for **each additional meter**. If you have tenants at your building, you do not need to add these accounts; they will be handled in the next step

- Click on "Add Additional Account" widget area:
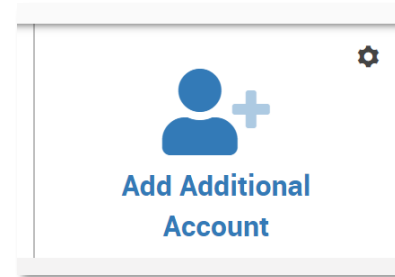
- Enter required information as instructed

Helpful Hint - For apartment buildings, *you* only have to add *house meter/common meter accounts*, you do not have to add individual apartment unit or residential accounts; these will be handled in the next step.

Helpful Hint - If you do not see this "Add Account" button, click on the gear ⚙ symbol on any of the widgets to display all available options, and select the "Add Account" widget.

The system will preserve your widget setting preferences for future login sessions.

Add Additional Account

See USER GUIDE for a visual guide of where to find this information on your bill.

Name on Account:

From CenterPoint Energy Bill, see instructions above

Street Address #

From CenterPoint Energy Bill, see instructions above

Account Number:

From CenterPoint Energy Bill, see instructions above

Linked Accounts:

Add Account

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Step 3: Create your Energy Data Portal Property

Step 3.1 Create your EDP Property

Helpful Hint - Whole-building data will transfer aggregated energy use data for **all meters** at the selected service address(es) – including any tenant meters.

Option 1 - SIMPLIFIED WHOLE - BUILDING BENCHMARKING (RECOMMENDED)

- Click on the "Initiate Request" button from the "Request whole-building data" widget

Request whole-building data:

Initiate Request

- Complete the whole-building data access form:

  - Assign a name in the "Building Name" field

  - Click each relevant service address that comprises the building, from the "My Service Addresses" list and confirm unit count details.

  - Use the "Add Other Locations" tab to search for and select service addresses where you do not have an authenticated account.
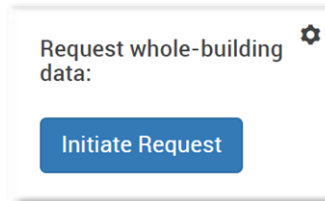
  Helpful Hint - In some cases for buildings with multiple accounts/meters, there may be more than one service address associated with a single building – please refer to your CenterPoint Energy bills to confirm relevant service addresses.

  - Clicking 🗑 will remove selected locations from the target list
  - Clicking 🔽 will show additional service address unit details

My Service Addresses: Add Other Locations:

Search 🔍

123 4FA St, Minneapolis, MN, 55401|888888002

123 MM St, Minneapolis, MN, 55401|888888006

Service addresses comprising target building:

Total count of meters: 4

🗑 345 P St, Minneapolis, MN, 55401|888888005 - 4 meter(s)   🔽

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Option 1 - (CONTINUED)

Service addresses comprising target building:

Total count of meters: 4

🗑 **345 P St, Minneapolis, MN, 55401|888888005 -**
4 meter(s)

345 P - Apt 101

345 P - Apt 102

345 P - Apt 103

345 P - Apt 104

- Confirm the expected number of meters at the property

Helpful Hint – In some multi-tenant buildings, a meter will be shown for each individual unit or meter at a property. If you're not sure, consider: Does each unit/suite have its own gas meter (this is likely if tenants pay their own gas bill)? Or is there a master/house meter(s) for the whole building?

- Click "Submit" to complete the whole-building data access request

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 building. 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 Group

    - 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

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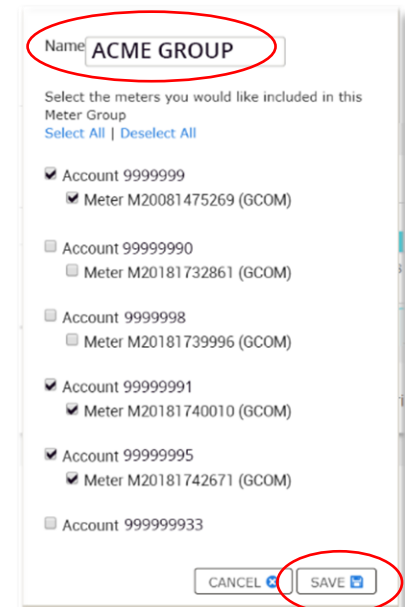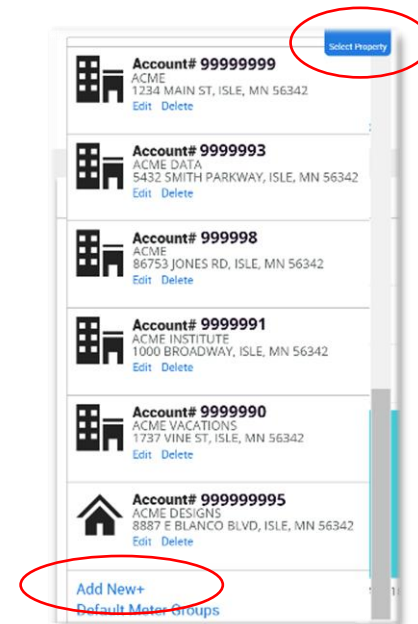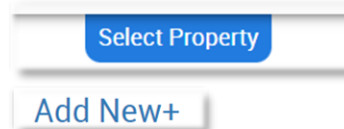
Step 3.2 (If applicable) Request further authorizations

- You will see the below message if further authorization is required. Follow the instructions on the screen to make applicable requests. **If you do not see this message, skip to Step 4**

- CenterPoint Energy is bound by regulatory policy to require additional authorizations prior to disclosure if either:

1) There are fewer than four customer/tenant accounts at the building service location, OR

2) More than 50% of the service location usage is attributable to any one non-authenticated account

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Step 3.3 (If applicable) Request additional account holder consent to aggregate whole-building energy use data

- When required, consent is needed from current account holders (i.e., renters or tenants) at the service location

- Complete and send requests to all account holders required to provide access to aggregated whole building data

Step 3.4 (If applicable) Account holders receive Consent Request email

- Identified account holder contacts will receive a Consent Request email, with copies sent to the Requestor and the EDP Team, including a link for contacts to complete the online authorization process

Helpful Hint - EDP generated emails can be flagged as Spam, the data requestor should follow-up with the account holder contact to ensure the Consent Request was received.

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Step 3.5 (If applicable) Account holders provide consent to release aggregated whole-building data in EDP

- Additional account holders, such as renters, complete the following form to provide their consent to release aggregated whole-building data to requestors
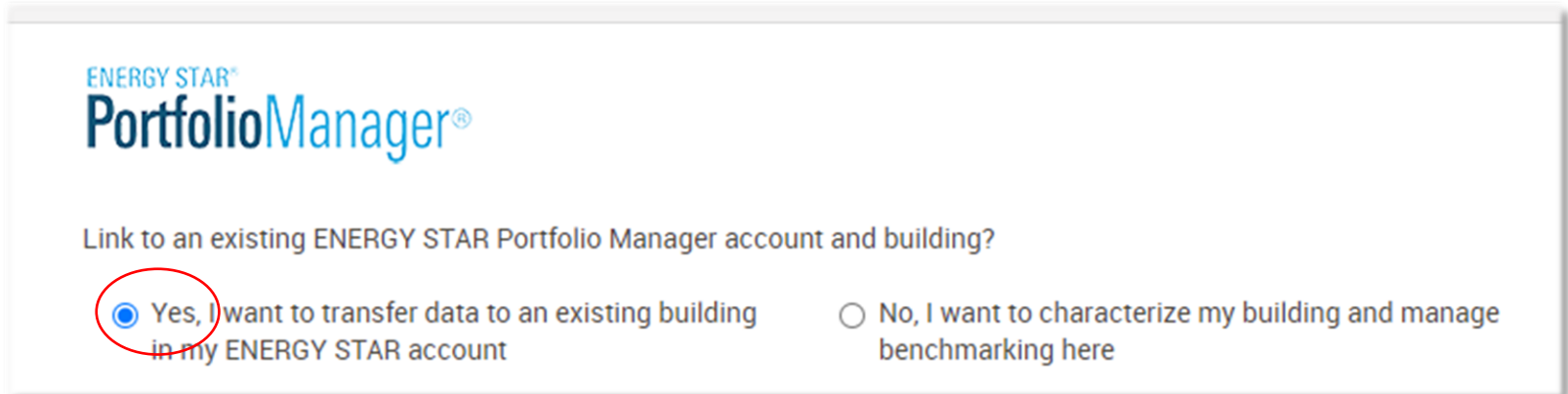
Helpful Hint - If you have any questions related to the account holder authorization request process, please contact the EDP support group at **cnpbenchmarking@icf.com**

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Step 4: Send Data from EDP to ESPM

In order to transfer monthly billing data from the EDP you must first establish a connection between your Energy Star Portfolio Manager (ESPM) account and CenterPoint Energy's web services account on ESPM. After the connection is in place you will be able to share your ESPM Property with the EDP and initiate automated data transfer

Step 4.1 Initiate connection to your ESPM account

- Select **Benchmark** from the EDP dashboard

- Select the radio button to answer 'Yes'
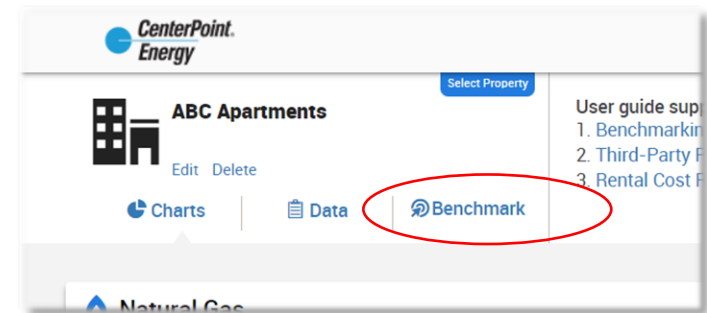
Step 4.2 Send and check for Contact connection request

- Click on the 'Request Connection' button to link to the EDP's Contact page on the ENERGY STAR web site (opens as a new tab on your web browser)

Helpful Hint - In the case that you are not currently logged on to the ESPM site, you may first be prompted to enter your username and password before you are transferred to the Contact connection page.

- Click on the 'Send Connection Request' button

Link to an existing ENERGY STAR Portfolio Manager account and building?

⦿ Yes, I want to transfer data to an existing building in my ENERGY STAR account

○ No, I want to characterize my building and manage benchmarking here

Link this property to an existing ENERGY STAR Portfolio Manager Property to initiate automated data tranfer:

1. First, from your Portfolio Manager account, you must request to Connect with the CenterPoint Energy web services account Contact

   Request Connection

2. Click the button below to have your ENERGY STAR Contact connection request accepted

   Check for My Contact Request

3. From your ENERGY STAR Portfolio Manager account, now select to enable Sharing for the Property where you would like billing data to transfer - requires Share Properties for Exchanging Data to be completed

   Initiate Sharing

4. Toggle control below to enter your ENERGY STAR Property ID and initiate meter data transfer

   ⬤ Link with Property ID

ENERGY STAR®
PortfolioManager®

Welcome mbtesting923:   Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out
Settings   Notifications

Send a Connection Request to <u>CenterPoint Energy</u> to Begin Exchanging Data

<u>CenterPoint Energy</u> 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 <u>CenterPoint Energy</u>. Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use: None Provided

Agreement: * ☐ I agree to my provider's (<u>CenterPoint Energy</u>) Terms of Use.

Send Connection Request   Cancel

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• Return to the EDP (by selecting the tab on your web browser) and click on the 'Check for My Contact Request' button

Helpful Hint - A green checkmark will appear to indicate that the system has accepted any submitted and pending contact connection requests.

Link to an existing ENERGY STAR Portfolio Manager account and building?

◉ Yes, I want to transfer data to an existing building in my ENERGY STAR account

○ No, I want to characterize my building and manage benchmarking here

Link this property to an existing ENERGY STAR Portfolio Manager Property to initiate automated data tranfer:

1. First, from your Portfolio Manager account, you must request to Connect with the CenterPoint Energy web services account Contact

Request Connection

2. Click the button below to have your ENERGY STAR Contact connection request accepted

Check for My Contact Request

3. From your ENERGY STAR Portfolio Manager account, now select to enable Sharing for the Property where you would like billing data to transfer - requires Share Properties for Exchanging Data to be completed

Initiate Sharing

4. Toggle control below to enter your ENERGY STAR Property ID and initiate meter data transfer

○ Link with Property ID

Step 4.3   Initiate ESPM property sharing

• Click on the 'Initiate Sharing' button to link to the Share Properties for Exchanging Data page on the ENERGY STAR web site

Check for My Contact Request

3. From your ENERGY STAR Portfolio Manager account, now select to enable Sharing for the Property where you would like billing data to transfer - requires Share Properties for Exchanging Data to be completed

Initiate Sharing

4. Toggle control below to enter your ENERGY STAR Property ID and initiate meter data transfer
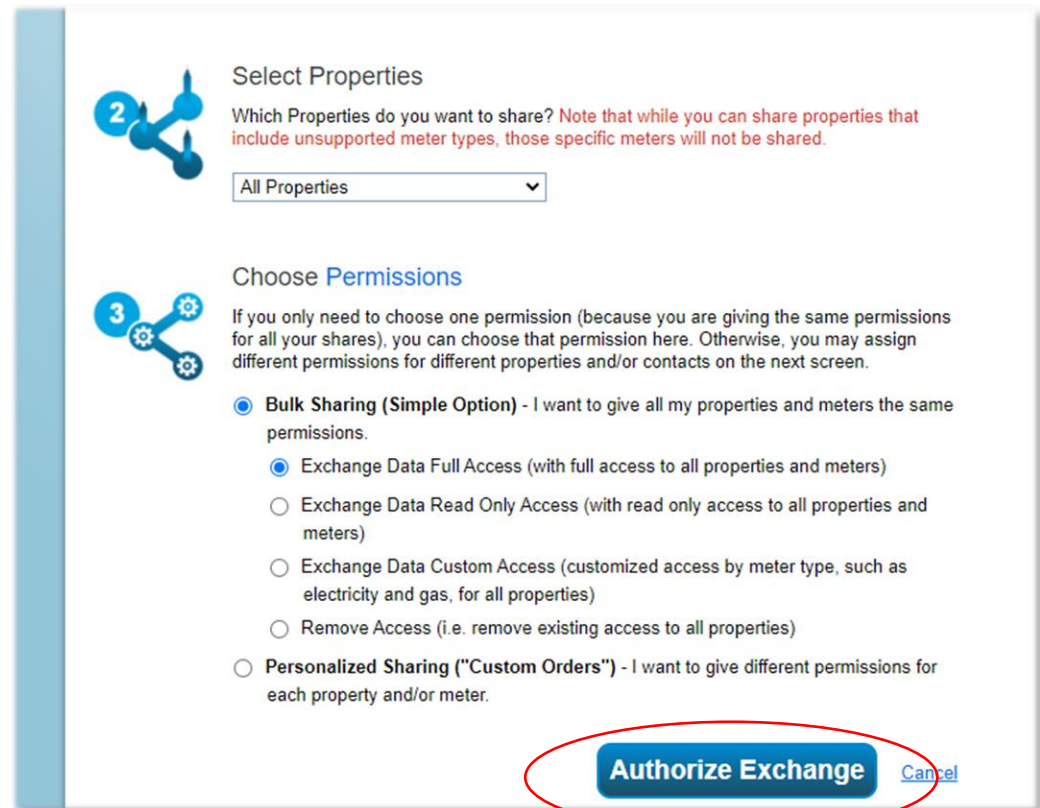
○ Link with Property ID

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- Complete form to select 'One Property' or 'All Properties' to share with CenterPoint Energy

Step 4.4 Set ESPM access permissions

Helpful Hint - The easiest option to ensure successful data transfer is to opt for 'Bulk Sharing' and assign 'Exchange Data Full Access' permission.

Custom settings may be applied if desired. At a minimum, the CenterPoint Energy contact needs to be assigned 'Exchange Data Full Access' permission to Natural Gas Energy Meters and Property Information in order to transfer data to ESPM.

- Click the 'Authorize Exchange' button to complete the sharing process

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.

All Properties ▼

Choose Permissions

If you only need to choose one permission (because you are giving 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.

- ● **Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.
  - ● Exchange Data Full Access (with full access to all properties and meters)
  - ○ Exchange Data Read Only Access (with read only access to all properties and meters)
  - ○ Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)
  - ○ Remove Access (i.e. remove existing access to all properties)
- ○ **Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

Authorize Exchange Cancel

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Step 4.5 Link ESPM Property ID to EDP property

- Click on the 'MyPortfolio' tab to view your ESPM building list

- Find and copy the Property ID for the ESPM property you are trying to link to your EDP property

- Return to the EDP and toggle the 'Link with Property ID' slider control

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• Enter your building's ESPM Property ID and click 'Submit'

• Confirm your property's information and click 'Yes'

• Confirm the meter data to be transferred and click 'Submit' to initiate data transfer process
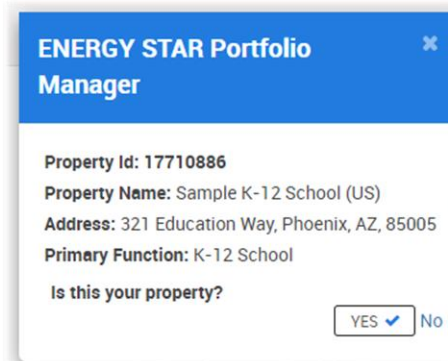
Congratulations! You have now established ongoing automated data transfer to ESPM to facilitate your building benchmarking.

Step 4.6 Confirm data transfer to ESPM

- Return to your ESPM account and select your target property from the MyPortfolio dashboard

- Select the 'Energy' tab for your property to confirm that the new EDP meter is showing with recent bill information in the 'Meters' table

Helpful Hint - In the case that your CenterPoint Energy account billed natural gas usage had been previously entered manually on a separate ESPM natural gas meter, because the EDP will transfer a full history of billing data it may be necessary to use the 'Change Meter Selections' to only include the new EDP meter and avoid double entry of historical usage.

FREQUENTLY ASKED QUESTIONS

Problem: I am trying to add an account but the Energy Data Portal keeps giving me an error message (e.g. "account number, street number or customer name does not match our records").

> **Solution:**
> - Check that you are using the correct information on your bills – see Pages 6-8 of user guide for a visual guide for where to find the correct information.
> - Check that you are following the special instructions for account authentication – see Step 2.2 on Page 5 of this User Guide.
> - Street Number: Make sure there is no space after the street number.

Problem: I do not see my building's service address in the list.

> **Solution:** You must first add all of your CenterPoint Energy accounts associated with the building – see Step 2.4 on Page 10 of this User Guide.

Problem: I am getting a "consent needed" message after I request whole building data, but I do not have any tenants in my building.

> **Solution:**
> - There is an additional account at the building that must be added to the Energy Data Portal before proceeding.
> - Check that all accounts associated with the building have been added – see Step 2.4 on Page 10 of this User Guide. After adding the additional account, you may have to wait for up to 20 minutes before the data will display.

Problem: I am getting a "consent needed" message for my building. I have tenants, but no unit or suite numbers are shown in the consent needed list, so I can't tell which unit the consent is needed from.

> **Solution:** Contact energydataportal@centerpointenergy.com for assistance in identifying the correct unit.

FREQUENTLY ASKED QUESTIONS (CONTINUED)

Problem: I have a mixed use property. My tenant pays their own CenterPoint bill, and are designated as a separate service address – how do I ensure that their energy use data is included in my aggregated data?

Solution: Contact energydataportal@centerpointenergy.com for assistance in adding your tenant's additional service address.

Problem: Energy Data Portal does not recognize my ENERGY STAR Portfolio Manager® property.

Solution: Check that you have shared the ENERGY STAR Portfolio Manager® property with CenterPoint Energy. See Step 4.3 on Page 20 of this User Guide.

Problem: CenterPoint Energy has not accepted my PROPERTY SHARE request in ENERGY STAR Portfolio Manager®.

Solution: 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 in Step 4.

Problem: After I click submit when sending my property's energy use data to ESPM, the screen freezes. No meters were created in ESPM, or I see that a meter was created, but no usage data was transferred.

Solution: The transfer process was interrupted and you must correct it by following these steps: 1) In ESPM, delete any meters that have been created by the Energy Data Portal. 2) In Energy Data Portal, on the property tab, toggle the "Use Existing Account" slider back to the left. 3) Restart Step 4. After clicking "submit", 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.

CONTACT INFORMATION AND USEFUL LINKS

User Support:

Email: cnpbenchmarking@icf.com

Phone: 507-315-1195 (8AM – 5PM CST)

Energy Data Portal:

https://www.CenterPointEnergy.com/EnergyDataPortal

THANK YOU!