## Automated Benchmarking

# Getting Started Guide

Sponsored by the Columbus Department of Public Utilities

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## **About Automated Benchmarking**

Automated Benchmarking is a no cost service for Columbus Department of Public Utilities commercial customers. Enrollment is simple - it should only take a few minutes - and provides you with 36 months of historical energy and water usage, data visualization, an established ENERGY STAR® profile (commercial) or Energy Utilization Index (EUI) (industrial) to benchmark your building performance, and tools to help you track and manage your energy and water use.

### What to Expect

There are five main steps to enrolling in Automated Benchmarking:

- 1. Establish an account (email address, password, etc.)
- 2. Agree to the Terms and Conditions most importantly, confirming that you are an authorized representative of the organization that you are enrolling
- 3. Link to an existing ENERGY STAR Portfolio Manager account or create a new one with an easy Automated Benchmarking set-up wizard
- 4. Provide details on your building(s) like the property use, square footage and year built
- 5. Connect with your Columbus Department of Public Utility accounts by providing account information and verifying billing data to start importing your energy usage history

## **Getting Started**

Before you begin, please make sure to have the following information ready to go for each utility account:

- 1. One current and one previous utility bill
- 2. The account number
- 3. The account service address

This information will allow you to enroll in the program, view 36 months of historical energy usage and visualize data usage trends.

In order to obtain an ENERGY STAR score and benchmark your performance against other similar buildings, you will also need:

- 1. Property information
  - a. Building type (e.g. office, retail, etc.)
  - b. Name, street address, ZIP/postal code

- 2. Property type data<sup>1</sup>
  - a. Gross floor area
  - b. Year built
  - c. Optional: Use details (e.g., number of workers, operating hours, etc.)

## 1. Establish an Account on Automated Benchmarking

This section describes the process for a utility account owner to establish an account and link to their utility accounts. If you are a third party acting on behalf of an account owner, please visit the section on Solution Providers.

 Navigate to <u>https://www.benchmarking.energy/</u>. Click on the "Sign Up" button on the top right corner of the landing page. Select the "I am an Automated Benchmarking User" option and fill out the enrollment form. Be sure to check the "I agree to the Terms of Use and Privacy Policy." You can review the Terms of Use and Privacy Policy by clicking directly on the blue text. Once complete click the "Create a New Account" button. You should receive a notification saying, "Your new account was successfully created. You will receive an Account Activation email shortly."

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			We Brid e Bri e Bri Bri Bri Bri Bri Bri Bri Bri Bri Bri	elcome or we begin, source of to know whether you are a Benchmarking User or instructional source of the source of										

2. Check your email account for an email from support@benchmarking.energy with the subject, "Automated Benchmarking - Account Activation." Click on the "Activate Account" button. Be sure to check your spam or junk folder if you cannot find the email.

<sup>1</sup> For a full list of building-specific data needed, visit <u>https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet</u>

This link is only valid for 24 hours. If you have passed the activation window, click on the "Need to reset your password?" link on the sign-in page and follow the prompts.

Automated Benchma	rking - Account Activation Inbox x		ē	Ø
support@benchmarking.energy to Imorgan+678 👻	12:04 PM (3 minutes ago)	☆	*	:
to imorgan+678 +	Automated Benchmarking Welcome to Automated Benchmarking! Hello, Test. A new Automated Benchmarking account has been created for you. Please activate your account by clicking the link below. This activation link will only be valid for the next 24 hours			
	Activate Your Account Sincerely, Automated Benchmarking Customer Care support@benchmarking.energy			

3. You will be taken to a screen to create a password. Passwords must contain at least 8 characters, one uppercase character, one lowercase character, one number and one special symbol. Enter your password twice to confirm there aren't any typos and click the "Activate" button.

Automated Benchmarking
Account Activation
Imorgan+678@jadetrack.com
Password
Confirm Password
Activate

## 2. Connect with ENERGY STAR Portfolio Manager

Once you've established an account, you'll be taken through a set-up wizard to connect to a Portfolio Manager account. The options below describe two paths:

- A. Link an existing Portfolio Manager account
- B. Create a new Portfolio Manager account

To get started, click the "Set Up My Account" button.

Test Customer	Columbia Gas 🛔
Automated Benchmarking organizes and keeps track of your utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace, meering leas work for your Dis tot your Utility usage data all non palace.	

#### A. Link to an Existing Portfolio Manager Account

1. If you have an existing ENERGY STAR Portfolio Manager account, click on the white "Link Existing Portfolio Manager Account" button.

An ENERGY STAR	Partner
An ENERGY STAR <sup>®</sup> Portfolio Manager <sup>®</sup> acc	ount is required to set up Automated Benchmarking
Do you have an <b>existing</b> Portfolio Manager account?	Do you need to create a new Portfolio Manager account?
Link Existing Portfolio Manager Account	Create New Portfolio Manager Account
3-5 Minutes	1-2 Minutes
	<b>Not sure?</b> We recommend you create a new Portfolio Manager account - this account can always be changed later.

2. To start linking accounts, you need to establish a connection between your ENERGY STAR Portfolio Manager account and Automated Benchmarking. The Connection Name and Management settings are pre-populated, but you can adjust them if needed before clicking the blue "Save Connection" button.

Blue Bakery		AEP OHIO	Columbia Gas
Setting Up Your Account:	Create a New Connection		
Request a connection	To start finling accounts, you are going to establish a connection between your ENERGY STAR <sup>®</sup> Portfolio Manager <sup>®</sup> account and Automated Benchmarking. A connection allows you to link the two eccounts, giving Automated Benchmarking permission bautomated/by inc, safety, and performance data.		
port existing properties	Add a New Connection Connection Nam <sup>a</sup> <b>0</b>		
	Blue Bakary Who can manage this connection* • • Anyone •		
	Seve Connection required		
	( Go Back		
	Quick Linka: (2) Getting Started Guide 🕢 Support		

3. Open a new tab and log into your Portfolio Manager account. Follow the instructions listed in the setup wizard to accept the connection with Automated Benchmarking. Once complete, return to the Automated Benchmarking tab but keep the Portfolio Manager tab open as you may return to it in step 6.

Blue Bakery		AEP ONIO	Columbia Gas	<b>.</b>
Setting Up Your Account	Request Your New Connection			
2 Request a connection	Great Jobi The connection between your ENERGY STAR <sup>®</sup> Portfolio Manager <sup>®</sup> account and Automated Benchmarking has been initiated.			
3 Finalize your connection	To finish the connection in Portfolio Manager $^{\circledast}$ follow these steps:			
Types existing properties	Open Portfolio Manager 1. Navigate and log in to your Portfolio Manager (2 account in a separate tab			
	Search Contacts 2. Make a Connection Request to benchmarking energy by clicking "Contacts" in the upper right-hand corner, and searching for "benchmarking energy"			
	<image/>			

4. Return to the Automated Benchmarking tab. Wait for the status of the Portfolio Manager connection to switch from 'Pending' to 'Connected.' Once complete, click the blue "Continue" button. If the connection takes longer than 5 minutes to complete, please contact support@benchmarking.energy.

Blue Bakery		AEP OHIO	Columbia Gas*	•
Setting Up Your Account:	Finalize Your <b>Connection</b>			
Request a connection     Finalize your connection	Your Connection Request is being processed by ENERGY STAR® Portfolio Manager® - this may take a moment. Once the status of the connection switches from 'Pending' to 'Connected,' your connection is complete and you can hit Continue to finish setting up your account.			
<ul> <li>(4) Import existing properties</li> <li>(5) Sync existing properties</li> </ul>	Review the Connection Below:			
	Blue Bakery QAVG6MRFPB Anyone Connected newuser4332 Aug 24, 2020			
	Continue If your connection is taking longer than 5 minutes, please contact Automated Benchmarking Support.			

5. If you had a previously existing Portfolio Manager account, you likely have properties in that account that you can automatically share with Automated

Benchmarking. If so, click the blue, "Yes, Sync Properties Now" button. If you do not have existing properties you wish to import, you can end your setup here by selecting "Add Properties Later," which will take you to the dashboard. From there, you'll be able to enter your property information manually.

Blue Bakery	Columbia Gas*
Setting Up Your Account:	Do You Have <b>Properties</b> You'd Like to Import?
Request a connection     Finalize your connection	Next, we'll start adding your properties to Automated Benchmarking. If you had a previously existing ENERGY STAR® Portfolio Manager® account, you likely have properties in that account that you can automatically share now with Automated Benchmarking.
4 Import existing properties	If you do not have existing properties you wish to import, you can end your setup here by selecting "Add Properties Later" which will take you to the dashboard. From there, you'il be able to enter your property information manually.
(5) Sync existing properties	Does your Portfolio Manager account have existing properties that you'd like to import to Automated Benchmarking?
	Add Properties Later Yes, Sync Properties Now Recommended
	( Go Back)

 Return to the tab with your Portfolio Manager account. Follow the instructions listed in the setup wizard to share your properties with Automated Benchmarking. Once complete, close the Portfolio Manager tab and return to the Automated Benchmarking tab.

Blue Bakery		AEP OHIO	Columbia Gas	<b>.</b>
Betting Up Your Account:           If Instance a connection         Fold           If Inspaced a connection         Fold           If Instance your connection         To in	Importing Existing Properties with instructions below to automatically there existing property information from your ENERGY STAR® not existing properties follow these steps:			
Import existing properties     () Sync existing properties     1	Open Portfolio Manager Navigate and log in to your Portfolio Manager (3' account in a separate tab			
8	Inter Properties Click "Share for Edit Access to) a Property"  PortfolioManager®  Market State Click State S			
	A constraint of a constraint o			
	Follow Us 💽 🚰 🛅 🗖 Gentectial (Press/Prior) Booter Previewsets   INSTRUY STAR Buildrow & Parts Weinte			

7. A list of properties shared from Portfolio Manager will appear. Select the ones with data that you would like to sync with Automated Benchmarking and click the blue "Sync" button.

Blue Bakery		AEP OHIO	Columbia Gas"	•
Setting Up Your Account:	Sync Existing <b>Properties</b>			
Create a connection     Request a connection	Below are the ENERGY STAR® Portfolio Manager properties you've shared with Automa Benchmarking. To complete the import, select the properties with data you'd like to syn	ited ic below.		
Finalize your connection	Your Shared Properties:			
Sync existing properties	Property Name: Type: Status: Data Shand: Blue Bakery HQ Building Pending 08/20/2020 Blue Bakery Kitchen Building Pending 08/20/2020			
	Sync			
	( GO BACK )			

8. You have successfully linked to your Portfolio Manager account and synced your existing properties with Automated Benchmarking. Click "Go to Dashboard" to view your dashboard and begin linking your properties to your utility accounts.



#### B. Create a New Portfolio Manager Account

1. If you do not have an existing ENERGY STAR Portfolio Manager account, click on the blue "Create New Portfolio Manager Account" button.

Test Customer			ARP OHIO	Columbia Gase &
	Weld Automated an energy star®			
	Do you have an estisting Portfolio Manager account? Link Estating Portfolio Manager Account 3-9 Minutes	Do you need to create a new Petfolio Manger account? Create New Portfolio Manger Account 12 Moutes Netion surface a new Portfolio Manger account - the account can elways be changed later.		
	Detting Blanted FAQ + What is Automated Benchmarking? + What is the setup process like? + What is an ENERGY STAR Portfolio Manage	r Account?	Berns of use - Polacy & couldan - Polacy	red by addTeck © 2020

2. Your company name and email address are pre-populated. Simply add your business address and click the "Create Account" button.

Test Customer		AEP	Columbia Gas.	<b>.</b>
Setting Up Your Account Oracle on INDROY EDA Petrolie Manager Account Petrolie Manager Account Petrolie Manager Account	Create an ENERGY STAR <sup>®</sup> Portfolio Manager <sup>®</sup> Account Automated Benchmarking can create a Porfolio Manager <sup>®</sup> account for you automatically. To create a new Porfolio Manager account; Information. Line the details below to automatically generate an ENERGY STAR Porfolio Manager account			
	Company Name* Test Customer Email*			
	Imorgan@jadetrack.com Business Address*			
	Street Address Line 1 Street Address Line 2			
	City           OHIO			
	Zp *required			
	Create Account	isofuse Privscy&cookies Pov	vered By JadeTrack © 2020	

3. Automated Benchmarking will create a Portfolio Manager account for you. Please record the Username and Password. Click "Continue" once you've saved this information.

NOTE: You will be able to view your Username from Automated Benchmarking, but your auto-generated password will not be recorded. To reset it at any time in the future, simply visit the <u>login page for Portfolio Manager</u> and follow the prompts for "I forgot my password."

Test Customer		AEP OMIO	Columbia Gas	<b>.</b>
Setting Up Your Account	Your <b>ENERGY STAR</b> <sup>®</sup> <b>Portfolio Manager<sup>®</sup></b> Account Details			
2 Review Account Details	Your new ENERGY STAR Portfolio Manager account has been successfully generated. At any time you may access your Portfolio Manager account via the ENERGY STAR website using the details below.			
	Please save your username and password for your records. This username can also be found in Automated Benchmarking on the ENERGY STAR Portfolio Manager connections page.			
	View Your Portfolio Manager Account Details Below			
	Username			
	ABM-2799 Password			
	qYI6=x7Z82)k			
	To login to your ENERGY STAR Portfolio Manager account, save this information or go to the Portfolio Manager			
	It will not be displayed again.			
	Centinus			
	( Gobsek)			

4. You have successfully created a Portfolio Manager account. Click "Go to Dashboard" to view your dashboard and begin adding building details.

Test Customer	
reaching and the province of the first of the province of the	

## 3. Add a Property

Once you have established an Automated Benchmarking account and connected with a Portfolio Manager account, you can begin adding the details of your facility.

1. From your main dashboard, click the blue 'Add Property' button in the top right corner to begin adding your buildings.

۲	Test Customer			Ac Build your Pri this button	Id New Property operty Portfolio by clicking	Add Property
PROPERTIES	ENERGY STAR <sup>®</sup> Score	Total Properties	Floor Space	much y	ou've saved in energy expenditures. End Tour	
METERS.		0		0		
	All Properties e					Export
	Show 0 ventries	⊥† METERS		11 SITE EUI	11 DATE	IJ
PROGRAM DASHBOARD			No data available in table		First Prev	lous Next Last
(?) HELP						

2. Begin by adding basic information about your property, including the name, street address and zip code. Click the "Next" button to save the information and move to the next step.

	Test Customer	PET UP & BROBERTY	Add Location Informati	on	ж	Add New Property Build your Property Pottfolio by clicking this button, You'll be able to track how	Add Property
-MOTENTIES		Property Location Property Data	Your facility will be added to the A	BM-2809 Portfolio Manager account			
60		ENERGY STAR® Details Meter Setup	Tell us where your property is I	ocated.			
o cros			Property Name *				
PORTFOLIO MANAGER			e.g. Company Headquarte	rs			
-			e.g. 1275 Kinnear Road				
DEVITE		17 AREA 11 METER	Address, Continued	Postal Code *			
PROCRAM			e.g. Suite 245	43212			
LATITECARS			Cancel	Next			
NLLP ()							

3. Add property data, including the year built and gross floor area (square footage). Select the building's Primary Function from the dropdown menu. The "Display" field is the name of the building you are describing, which will be displayed throughout the tool. The "Identifier" field is optional and can be used to reference a facility identifier or code you may use internally at your organization. Click the "Next" button to save the information and move to the next step.



4. Click "Add Details" to enter additional information about your property, such as the number of workers, operating hours, etc. These details are specific to the Primary Function selected in the previous step. Once complete, click the "Save Facility" button to save the information and move to the next step.

Contractions	Test Customer	SET UP A PROPERTY Property Location Property Data ENERGY STAR® Details Mater Setup	Add ENERGY STAR <sup>®</sup> Details X Good Start If you're pressed for time, click Swe Poperty, we have enough to calculate a basic DNERGY STAR <sup>®</sup> acces.  Rational Preser nots, information well be automitted to the EPA for the purposes of calculate tip the proposes for StarSY Star Box.	Add New Preparty Buld you Property Particles by dicking this studies. Not Die alse to track how much you're ward of newry operational East Tour O	i (dilinger)
			Back Save Property		Expert
Footaat Alexandra					Product Next Last
() HELP					

5. Click the "Next" button to add a meter to this property.



## 4. Link Meters to Your Property

Now that you've added property details to Automated Benchmarking, you can link meters from the Columbus Department of Public Utilities so usage data will be updated automatically.

A. From the main dashboard, click on property associated with the meter you want to link. From the property page, click the "Add Meter" button under the "Meters Active" section (You may also reach this page as the last step of setting up a new facility, as described above).

Test Customer					l	Columbia Gas	Add Property
Test Company Headqua	arters						
ENERGY STAR® Results score Not Available	site eui Not Avai	lable	Anna Maria	Office 123 Main Street 10,000 Ft <sup>2</sup> Edit		Meters Active	
Property Meters		JTAL.	12 MOI No data availa	VTH TREND	CURRENT THE	юлан	
Property Uses							Add Property Use
NAME	IT TYPE	IF FLOOR AREA					
Office	Office	10,000 Ft <sup>2</sup>			Update Fix		
	est Customer Test Company Headque ENERGY STAR <sup>®</sup> Results score Not Available Property Meters Property Uses MAXE Once Once	est Customer  Test Company Headquarters  ENERGY STAR® Results score Not Available  Property Meters  MAKE  II TYPE II TYPE II TYPE  MAKE II TYPE Office Office	est Customer	est Customer	est Customer	est Customer	est Customer

#### B. Adding a Columbus Department of Public Utilities Meter

Follow these instructions to add a Columbus Department of Public Utilities electric or water meter to Automated Benchmarking. You will need two recent bills.

1. Click on the "Link My City of Columbus Account" button.

	RET UP & BRODERTY	Meter Setup 🛛			
PROPERTIES	S Property Location Property Data	In order to get an accurate ENERGY STAR®, you must enter all energy meters.			
ALC CONS.	ENERGY STAR <sup>®</sup> Details Meter Setup	If you have an AEP Ohio or Columbia Gas meter, we can import it automatically. If not, no worries, we'll walk you through manually adding it.			
<i>8</i>	Not Availa	Please select one of the options below.			
205		Link My AEP Ohio Account			
00000		Link My Columbia Gas Account			
e		Link My City of Columbus Account			
PROVIDER STARTES	]/ 12 MONTH TOT	Manual Meter Setup	CURRENT		
()					
nite -				Terms of Law . Privacy & contrine . It	corrective intelligence of 1920

2. Enter your Columbus Department of Public Utilities Account number without any dashes or spaces, the Service Address Street Number as it appears on your bill, and the Service Address Zip Code. If you are not sure where to find this information on your bill, click the blue "See a sample bill" text to see an example. Check the box to confirm that you are the owner of the account or authorized by the owner to enroll the account. Click the "Next" button to save the information and move to the next step.

		Link Mu City of Columbus Account		ATP COND			
		In order to automatically gather the usage information from this account	ount,				
<u>an</u>		we need some information from you. Please provide the following as it appears on your City of Columbus I bill Not sure where to find this information? See a sample bill	Jtility				
S	sive eui Not Av	Please note, this information will be submitted to the EPA for the pury of calculating the associated facility's ENERGY STAR score.	poses				
MANAGER		City of Columbus Account Number (No Dashes)	ø				
usens pro-		Service Address Street Number					
PROVIDER	μ	e.g. 3001 Service Address Zip Code		CURRENT THRO			
		e.g. 43212		No Data			
		□ I am the owner of this account or am authorized by the owner to e this account.	anroll				
		Cancel Next		41			
	Adult Educati			Update			
HELP					Terres of Las. Photosyl & analysis Pro-	and by indefinit © 2020	

3. Enter the usage from the two months listed, which are three months apart. If you are not sure where to find this information on your bill, click the blue "See a sample bill" text to see an example. Click the "Add Meter" button to save the information and connect with your Columbus Department of Public Utilities meter data.

W	Test Account		Meter Setun		x	ATP	Columbia Gas	Add Property
PROFESSION			Please enter the total usage from	the following two bills. Not sure w	here to			
20 		SITE EUI	May 2020	<u> </u>	_			
Ø PORTFOLIO MANAGER		Not Av	Mar 2020					
205								
C.			Back	Add Meters				
SHARING		11	12 MONTH TOTAL	12 MONTH TREND				
() HELP								

#### C. Adding a Meter Manually

Follow these instructions to add a utility account that is not tracked through a participating utility provider described above. You will need to manually enter usage information for these accounts so you will need enough bills to enter the historic information you would like to capture.

1. Click on the "Manual Meter Setup" button.



2. Enter your Meter Name, Meter Number, Type, Unit of Measurement and Date Active date. Click the "Add Meter" button to save the information and complete the meter setup.



## 5. Add Meter Data to Automated Benchmarking Manually

Follow these instructions if you need to add energy data to Automated Benchmarking (from a utility source outside of the participating utilities).

- Once you have added a meter manually following the steps described above, navigate to that meter page from the "Meters" button on the left side of the screen, or from the "Property Meters" list on the main property page. Click on the name of the meter you wish to update with historic data.
- 2. Click on the "Add Meter Usage" button.
- 3. Select the reporting period for the usage. Energy data provided by the Columbus Department of Public Utilities corresponds to your actual bills, and therefore the same meter read and bill dates. When manually entering meter data, you have the option for a "quick entry" that uses simple monthly inputs - "By Month" - (Jan, Feb, Mar etc..) and a true date range entry - "By Custom Range." Using the Custom Date Range entry is preferred, and gives you the ability to enter actual billing dates.
- 4. For "By Month" entry, simply select the month from the menu and add the usage in the relevant unit of measurement.
- 5. For "By Custom Range" entry, select the start and end date of the billing period, as well as the month of the billing cycle for a reference (for example, a billing cycle may run January 12 through February 11 you could refer to this as a January or a February bill. Whichever you select is fine as long as you use the same naming strategy with each bill). Add the usage in the relevant unit of measurement. Click the "Add Another Range" button to add additional months of data, or the "Save Usage" button to save the information and complete the meter data entry.

## 6. Invite Solution Providers

If you have a third-party vendor - a "Solution Provider" - who supports your energy management efforts, you can use Automated Benchmarking to easily share your usage and benchmarking data with them.

To do so, you must still establish an Automated Benchmarking account and link to your Portfolio Manager account (completing the "Establishing an Account on Automated Benchmarking" and "Connecting with ENERGY STAR Portfolio Manager" steps above), at a minimum. After these steps, you may invite your Solution Provider to join your account, giving them access to complete the remainder of the process on your behalf, if needed, and add additional data.

- 1. Ask your Solution Provider to sign up for a Solution Provider account on Automated Benchmarking. Instructions can be found in the Solution Provider section of this document.
- 2. Click on the "Provider Sharing" button on the left side of the screen.

V	Test Customer			AE OH	Columbia (	Gas* Add Pr	roperty
	ENERGY STAR <sup>®</sup> Score	Total Prope	rties	Floor Space	Me	ters Active	
<b>METERS</b>	100 AVG.	1		48k ft <sup>2</sup>	1		
	All Properties o Show 10 v entries						Export
USERS	PROPERTY J1 A	REA ↓↑ METERS	ENERGY STAF	R <sup>®</sup> SCORE ↓↑	SITE EUI	J↑ DATE	17
PROVIDER SHARING	Test Building 44	8,000 Ft <sup>2</sup> 1	• 100		1.7 Fi	Today rst Previous 1	> Next Last
(?) HELP				Ter	ms of use Privacy & cookies	Powered By JadeTrack @	9 2020

3. Click on the "Invite Solution Provider" button on the top right corner.

	Те	st Customer						AEP OHIO	Columbia Gas <sup>®</sup>	Add Property	•
		Provider Sharing								Invite Solution Provider	
		SUBMITTER	ţţ	DATE CREATED	JF SOLUTION PR	OVIDER	ţţ	EXPIRES			.
ଜ					No	matching records foun	d				
PORTFOLIO MANAGER											
USERS											
Ċ											
PROVIDER SHARING											
?											
HELP								Terms of	use Privacy & cookles Power	ed By JadeTrack © 2020	

4. Enter the email address of the Solution Provider enrolled in Automated Benchmarking and click the blue "invite" button.

Test Customer	Invite Solution Provider	Columbia Gas.	Add Property
Provider Sharing	Enter your solution provider's email address. Solution Provider Email Address Email Address		Invite Solution Provider
	Cancel Invite		
			l By JadeTrack © 2020

5. Click the blue "yes" button to agree to sharing your benchmarking information with the Solution Provider.

		haite Caletina Develop		Add Property
	() DATE CREAT	Invite Solution Provider Sharing your data with Imorgan@jadetrack.com will allow anyone at AEP Ohio to access your benchmarking data. Are you sure you would like to continue?		Invite Solution Provider
		Cancel Yes		
HELP		Ter	ms of use Privacy & cookies Powered	By ladeTrack © 2020

6. The status will be listed as pending. Your Solution Provider will receive an email to accept your invitation. This status will switch to Accepted once your Solution Provider has completed their process.

## **Automated Benchmarking for Solution Providers**

Automated Benchmarking was intended to be a self-service tool for commercial and industrial business customers. However, many customers have third-party vendors - "Solution Providers" - who support their energy management efforts and may want to utilize Automated Benchmarking on their customers' behalf.

To do so, the account owner must still establish an Automated Benchmarking account and link to their Portfolio Manager account (completing the "Establishing an Account on Automated Benchmarking" and "Connecting with ENERGY STAR Portfolio Manager" steps above), at a minimum. After these steps, the account owner may invite their Solution Provider to their account, giving the Solution Provider access to complete the process and add additional data.

If you are a Solution Provider, please follow the steps below to establish an account and connect with your customers.

#### 1. Establish a Solution Provider Account

- A. Navigate to <u>https://www.benchmarking.energy/</u>. Click the button on the top right to Sign Up and select the "I am an Automated Benchmarking Solution Provider" option.
- B. Complete the enrollment form. Be sure to check the "I agree to the Terms of Use and Privacy Policy." You can review the Terms of Use and Privacy Policy by clicking directly on the blue text. Once complete click the "Create a New Account" button. You should receive a notification saying, "Your new account was successfully created. You will receive an Account Activation email shortly."
- C. Check your email account for an email from support@benchmarking.energy with the subject, "Automated Benchmarking Account Activation." Click on the "Activate Account" button. Be sure to check your spam or junk folder if you cannot find the email. This link is only valid for 24 hours. If you have passed the activation window, click on the "Need to reset your password?" link on the sign-in page and follow the prompts.
- D. You will be taken to a screen to create a password. Passwords must contain at least 8 characters, one uppercase character, one lowercase character, one number and one special symbol. Enter your password twice to confirm there aren't any typos and click the "Activate" button.
- E. Your dashboard will be populated with data once your customers have established their accounts and invited you to connect.

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