

# **SGS PORTAL USERS GUIDE**

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# SGS Portal Users Guide

## What is the SGS Portal?

The Smart Grid as a Service (SGS) Portal provides you, the consumer, with a way to view information about your use of energy resources, which could include electricity, water and/or natural gas. This information helps you manage your energy consumption and potentially reduce your energy costs. For example, through the SGS Portal, you can view the amount of energy resources used per month for the past year as well as the estimated cost of these resources.

## What Do I Need to Get Started?

The SGS Portal is designed to be compatible with most computers, tablets, and smartphones; as well as most internet web browsers and web browser versions. Generally speaking, there are no hard-and-fast requirements for a computer used to access the SGS Portal. In order to establish your account and use the SGS Portal, you must have the following:

- › Access to a computer, tablet, or smartphone

*Your local library may provide free access to a computer with internet access.*

- › Internet connection and browser

*Suggested programs include Microsoft Internet Explorer 10 or 11, Google Chrome, Mozilla Firefox, and Apple Safari.*

- › A service account with the utility and your service account number

*Your service account number is listed on your utility bill.*

- › A four-digit personal identification number (PIN) that will be provided by the utility

The SGS Portal is separate from your utility website and requires a separate account and access information (username and password). Any portal account login information you may have established with your utility cannot be used to sign in to the SGS Portal.

## How Do I Set Up My Account?

The seven steps to set up your SGS Portal account are as follows: Each of these steps is described in greater detail below.

1. Confirm that you have a service account
2. Obtain your utility-specific SGS Portal internet address
3. Bring up the SGS Portal website
4. Create an SGS Portal account

5. Sign in to the SGS Portal
6. Choose a challenge question
7. Add a utility account

### Step 1. Confirm that you have a service account

If energy resources are distributed to you by a utility company and you are billed for them, you have a service account. Your service account number appears upon your utility bill. Please have your utility account number handy while creating an SGS Portal account.

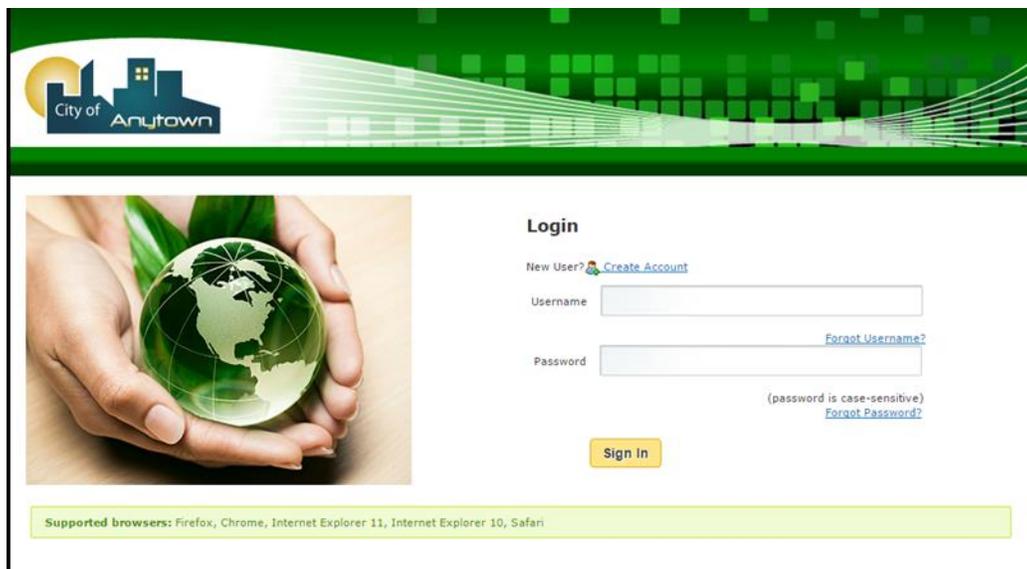
### Step 2. Obtain your utility-specific SGS Portal internet address

Your utility has a unique SGS Portal internet address that may be listed on the utility's primary web site or can be obtained by contacting the utility's customer service.

### Step 3. Bring up the SGS Portal website

Bring up your web browser and type the SGS Portal internet address provided by your utility into the address bar. The SGS Portal **Login** page is displayed:

SGS Portal Login Page



### Step 4. Create an SGS Portal account

Click the **Create Account** link on the SGS Portal **Login** page:

Create Account Link

Login

New User?  [Create Account](#)

Username

[Forgot Username?](#)

Password

(password is case-sensitive)

[Forgot Password?](#)

**Sign In**

The **Create an Account** page is displayed:

Create an Account Page

**Create an Account**

**All Fields are Required** Save Cancel

**First Name**

**Last Name**

**Email**

**Confirm Email**

**Online Account Information**

**Username**  
  
Username must not contain spaces  
Username must not contain any special characters (for example !=\$%^&)

**Password**

**Confirm Password**  
  
Passwords are case-sensitive  
Password must be between 8 and 16 characters long  
Password must contain at least 1 alphabetic character  
Password must contain at least 1 numeric value  
Password must contain at least 1 special character (for example !=\$%^)



Enter the text as it appears in the box:

Save Cancel

The **Create an Account** page asks you to enter three types of information:

- › Information that identifies you
- › SGS Portal account access information
- › A verification number, which is randomly generated by the SGS Portal

*NOTE: This page does not ask you to enter your utility account information. You will enter that information during Step 7.*

### Information That Identifies You

The information that identifies you is entered in the top portion of the page:

**Your Information**

**First Name**

**Last Name**

**Email**

**Confirm Email**

*NOTE: Each SGS Portal account must be assigned to a unique, valid e mail address. When more than one user needs to be associated with a single utility service account, each user must set up a separate SGS Portal account, be assigned a username, and use a unique email address. This function is useful for a business account for which more than one person may need to view energy usage.*

However, if you have more than one service account within your utility’s service territory, the SGS Portal established with your email address will display all of those accounts.

*NOTE: Additional information regarding multiple utility accounts is provided under Step 7.*

### Account Access Information

The next step is to create your SGS Portal account access information. Your username may be a combination of numbers and letters, but cannot contain spaces. The system will let you know if the username you request is already in use. If it is, simply try an alternative username.

To enhance your account security, your password must conform to the password complexity rules listed. These include:

- › Passwords are case sensitive (S is different than s)

- › Passwords must be between 8 and 16 characters long
- › Passwords must contain at least 1 alphabetic character (a letter)
- › Passwords must contain at least 1 numeric value (a number)
- › Passwords must contain at least 1 special character (the special character may NOT be \$, <, >, or \)

#### Account Access Information

**Username**

Usernames must not contain spaces  
 Usernames must not contain any special characters (for example !=\$%^&)

**Password**

**Confirm Password**

Passwords are case-sensitive  
 Passwords must be between 8 and 16 characters long  
 Passwords must contain at least 1 alphabetic character  
 Passwords must contain at least 1 numeric value  
 Passwords must contain at least 1 special character (for example !=\$%^&)

#### Verification Number

The verification number at the bottom of the page is a randomly generated number used to ensure that a person, not an automated program, is creating the account.

#### Verification Number

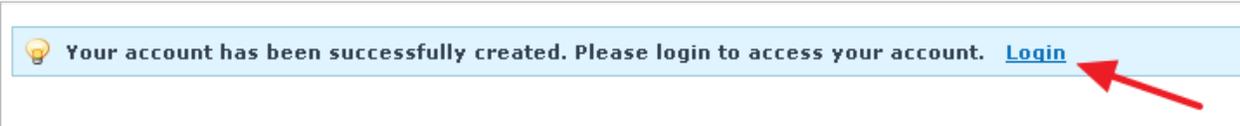


Enter the text as it appears in the box:

Type the number that you see into the empty box provided. If you cannot read the number, leave the box empty and click the **Save** button. You will see a message that says that you did not provide the verification number and a new verification number for you to type into the box will be generated and displayed.

After you have entered all of the information on the page, click the **Save** button. The SGS Portal checks the information and notifies you if there are any problems (such as your username already being in use). If the SGS Portal does not find any problems, your account is created and the following message is displayed:

Portal Account Created Message

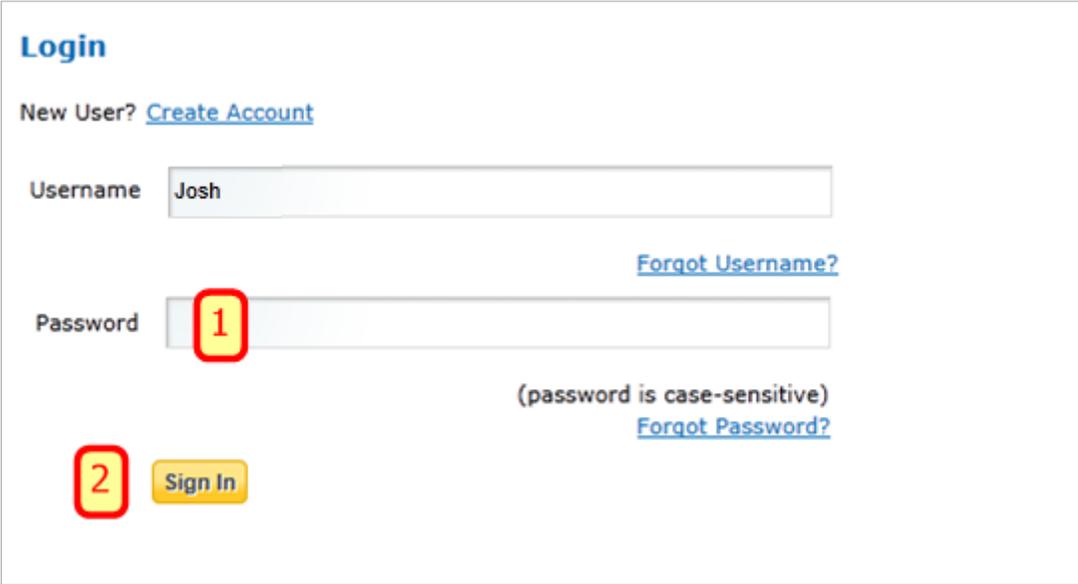


Click the **Login** link to sign in to the SGS Portal. The **Login** page will then be displayed.

Step 5. Sign in to the SGS Portal

The **Login** page is displayed with your username already filled in. Enter your password then click the **Sign In** button:

Login Page



Step 6. Choose a challenge question

The first time you sign in to the SGS Portal, the **Password Reminder** page is displayed, which requires you to select a challenge question and provide an answer.

## Challenge Question Page

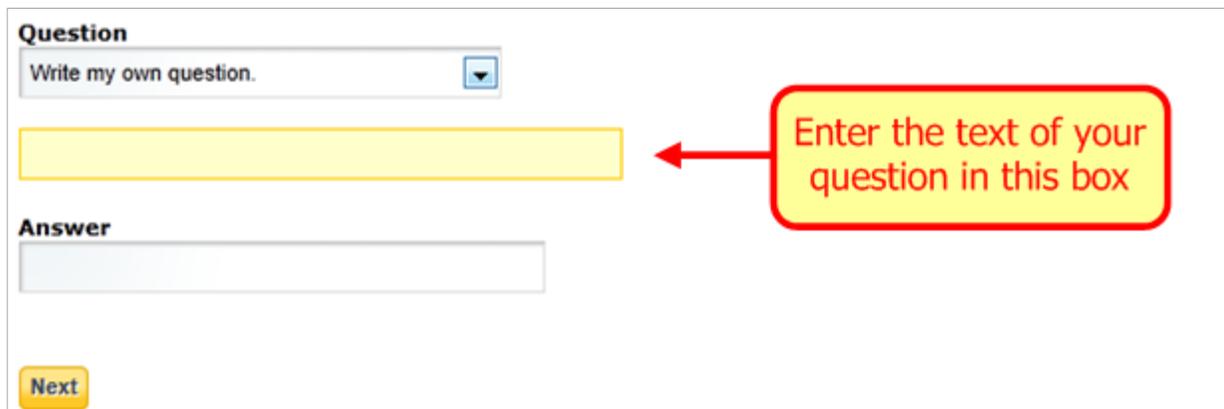


The SGS Portal uses the challenge question to confirm your identity if you forget your password. You will be unable to use the SGS Portal until you provide this information.

Select a question from the **Question** drop-down list. Type an answer for the question in the **Answer** box. The answer is case-sensitive, so be careful to select an answer that you can remember exactly. When you are asked for the answer, you will be required to enter it exactly as you enter it on this page, including upper and lower case.

As an alternative, you can create your own question. To do so, select “**Write my own question**” from the **Question** drop-down list. A new box appears above the **Answer** box for you to type the text of your custom question.

## Custom Challenge Question



After you have selected a question and provided an answer, click the **Next** button.

The **Associated Accounts** panel is displayed. Step 7 will guide you through this process.

#### Associated Accounts Panel

**Associated Accounts**

Add Account Below

---

**Add an Account**

**All Fields are Required**  
**If you don't know your 4 digit PIN, please contact your utility.**

4 Digit PIN

Account # (numbers only)

**Add Account**

### Step 7. Add a utility account

The **Utility Accounts** tab on the **My Profile** page allows you to add/associate and delete/dissociate your utility service accounts with your SGS Portal account. Once you add a utility account to your SGS Portal account, you will be able to view information about your energy resources use.

To add a utility account to your SGS Portal account, use the **Add an Account** controls on the **Utility Accounts** tab.

## Add an Account

### My Profile

The screenshot shows the 'My Profile' page with three tabs: 'Personal Data', 'Online Account', and 'Utility Accounts'. The 'Utility Accounts' tab is selected. Below the tabs is the 'Associated Accounts' section, which contains a table with one row: 'Consumer Account #' with the value '7411' and a 'Delete' button. Below this is the 'Add an Account' section, which has a heading 'Add an Account', a note 'All Fields are Required. If you don't know your 4 digit PIN, please contact your utility.', and two input fields: '4 Digit PIN' and 'Account # (numbers only)'. An 'Add Account' button is at the bottom of this section. Red arrows point to the 'Utility Accounts' tab and the 'Add an Account' section header.

To add a utility account, follow the process below.

1. Type the utility-provided, four-digit security code in the **4 Digit PIN** box.
2. Type your utility service account number in the **Account #** box. Your utility service account number is listed on your utility bill.
3. Click the **Add Account** button. The SGS Portal verifies that you own the utility account and associates the utility account with your SGS Portal account.

### Multiple Utility Accounts

If you have more than one service account within your utility's service territory, you can associate multiple utility accounts with a single SGS Portal account. After you have added the utility account(s) to your SGS Portal account following the process above, a list of **Associated Accounts** appears above the **4 Digit PIN** box as in the following example:

## Associated Accounts List

### Associated Accounts

Consumer Account #	
7411	<a href="#" style="background-color: #ffc107; color: #000; padding: 5px 10px; border-radius: 3px;">Delete</a>

### Add an Account

**All Fields are Required**  
If you don't know your 4 digit PIN, please contact your utility.

4 Digit PIN

Account # (numbers only)

[Add Account](#)

Once you have added a utility account(s) to your SGS Portal account, the SGS Portal displays the **Home** page when you sign in. After selecting the **My Consumption** page, you can view your energy consumption as described in the next section.

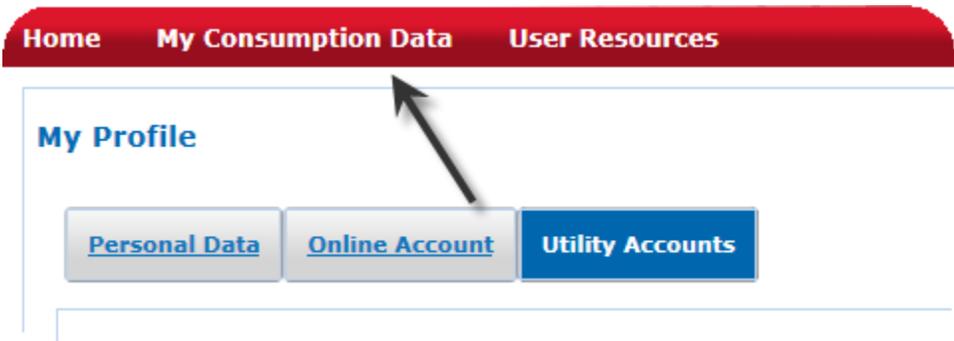
## How do I Use the SGS Portal?

- › Review your energy consumption
- › Update SGS Portal account information
- › Sign out of the SGS Portal
- › Solve sign-in issues

### Review your energy consumption

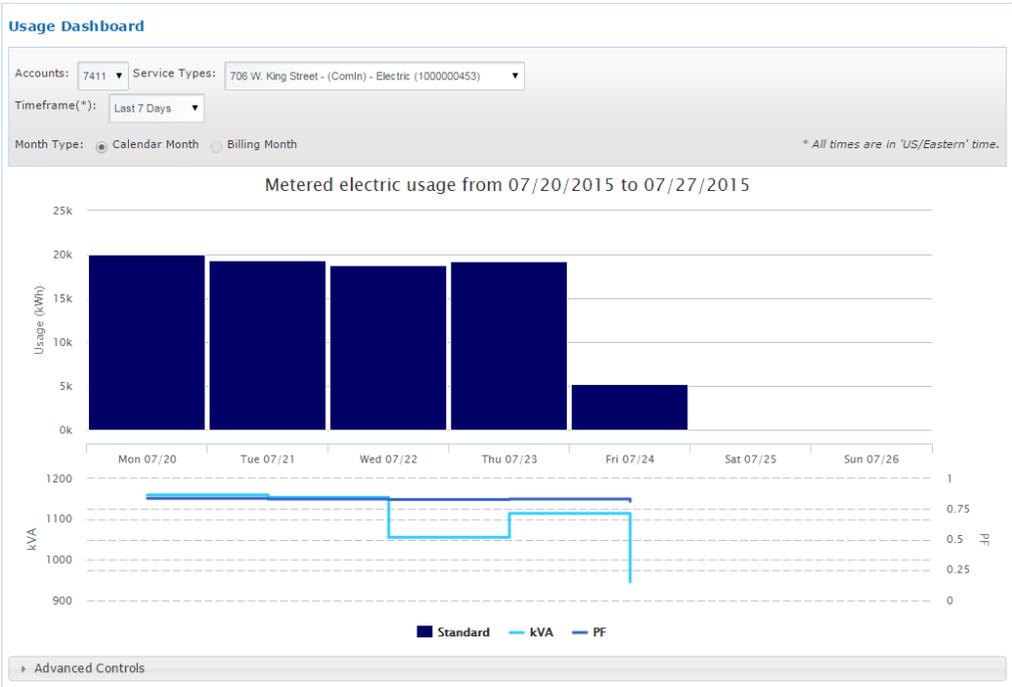
Now that your SGS Portal account is associated with a utility service account, you can use the **My Consumption Data** page on the SGS Portal to review information about your use of energy resources. Simply click **My Consumption Data** on the main menu of the webpage, just under your utility logo.

My Consumption Data Page



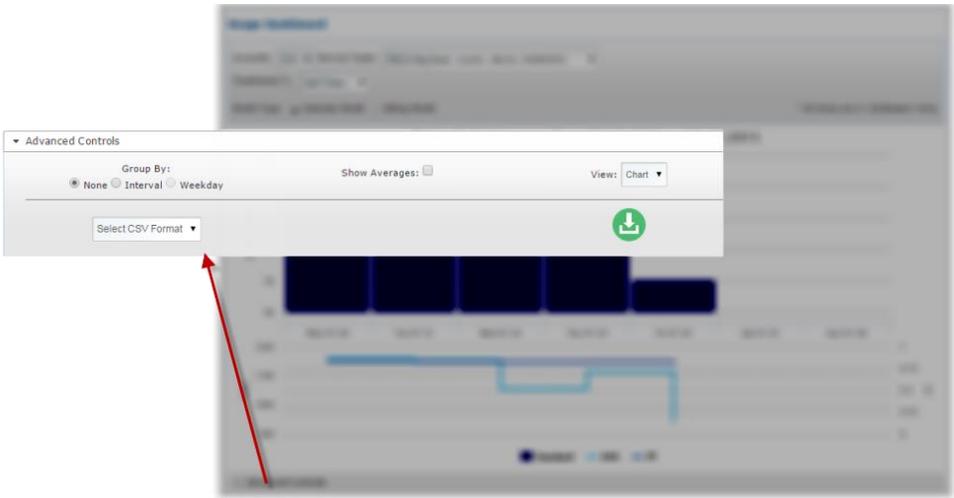
The My Consumption Data page, featuring the Usage Dashboard, is displayed:

My Consumption Data Page



The **Advanced Controls** options allow you to further refine the data displayed on your **Usage Dashboard**.

### My Consumption Data Page



**Advanced Controls** allows you to view data in different arrangements. Using **Group By:**, the data can be displayed by Interval or Weekday. **Interval** shows the total daily usage during each 15 minute interval for the time frame selected. **Weekday** totals the usage for each day of the week for the time frame selected. For example, if your timeframe covered four weeks, four values would be added together to compile the total value for each day.

**Show Averages** draws a straight line across the chart representing the average value of the data being reviewed.

**View** will switch the display between a graph and a chart based on the time frame selected.

When downloading the data represented in the graph or chart, the drop down menu allows you to select the format for the output. This allows you to work with the data offline, if you desire.

The green button is provided for customers that interact with additional Smart Grid third party applications. Pushing this button creates an output file of your consumption that can be ported and uploaded, as needed. At this point in time, there are very few users who will ever need to use this function.

### Update SGS Portal account information

You can modify your account and challenge question information on the **Online Account** tab.

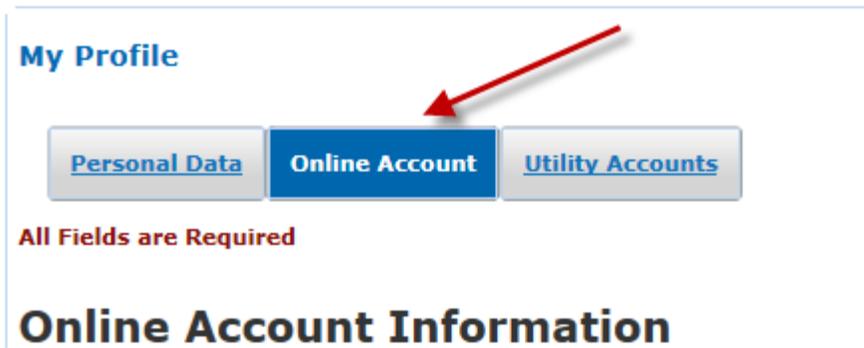
Click on **My Profile** in the upper right corner of your webpage.

#### My Profile Link



The My Profile page will display the tabs **Personal Data**, **Online Account**, and **Utility Accounts**.

My Profile Page, Online Account Tab



The **Online Account** tab allows you to update your password, challenge question, and answer.

The image shows a screenshot of the 'Online Account Information' form. At the top left, the text 'My Profile' is displayed in blue. Below this, there are three tabs: 'Personal Data', 'Online Account', and 'Utility Accounts'. The 'Online Account' tab is highlighted in blue. Below the tabs, the text 'All Fields are Required' is written in red. Underneath, the heading 'Online Account Information' is shown in a large, bold, black font. The form contains the following fields: 'Username:' followed by a text input field; 'Password' followed by a text input field; a list of password requirements: 'Passwords are case-sensitive', 'Passwords must be between 8 and 16 characters long', 'Passwords must contain at least 1 alphabetic character', 'Passwords must contain at least 1 numeric value', and 'Passwords must contain at least 1 special character (for example !=%^&, excluding \$<>)'; 'Challenge Question' followed by a dropdown menu with the text 'What is your city of birth?'; and 'Answer' followed by a text input field.

Online Account

To change the **Password**, enter a new password that meets the criteria stated. To change the **Challenge Question**, either replace the answer to the existing question or select another question from the **Challenge Question** drop down list then enter the appropriate response in the **Answer** box.

Once all changes are complete, click **Save Changes**. If you decide not to make any changes, selecting **Cancel** will disregard any edits.

Save or Cancel



## Sign out of the SGS Portal

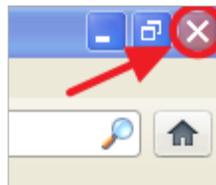
When you are done using the SGS Portal, please sign out by clicking the **Sign Out** link on the upper right of any page:

Sign Out Link



We recommend closing your web browser window after signing out of the SGS Portal. The method varies by web browser and operating system. For example, on a computer running the Microsoft Windows operating system, an Internet Explorer web browser window may be closed by clicking the “X” in the upper right corner. Please refer to on-line help, specific to your web browser or operating system, for more information.

Microsoft Windows “X” with Internet Explorer



## Solve sign-in issues

If you do not remember your password or username when you return to the SGS Portal, select either the **Forgot Username?** Or **Forgot Password?** link for assistance. The system will send temporary login information to the email address provided during the setup, if needed.

### Forgot Username? and Forgot Password? Links

**Login**

New User? [Create Account](#)

Username

Password

(password is case-sensitive)

[Forgot Username?](#)

[Forgot Password?](#)

