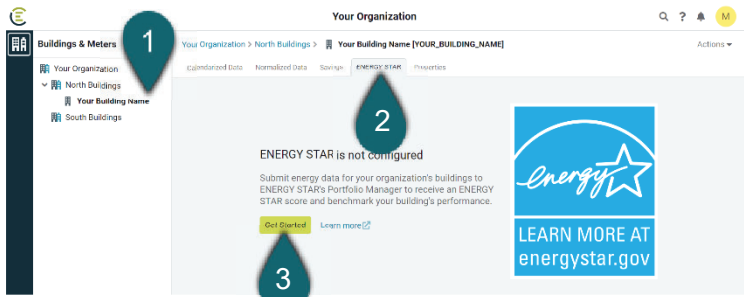
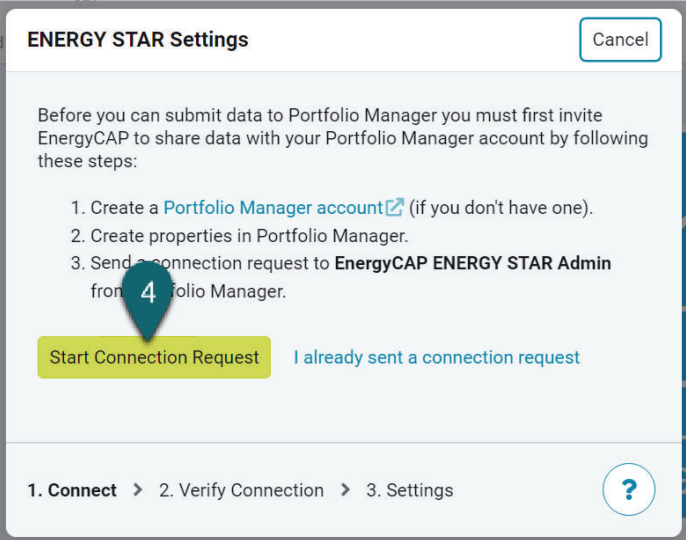


EnergyCAP: Link an account and a building to ENERGY STAR® Portfolio Manager®

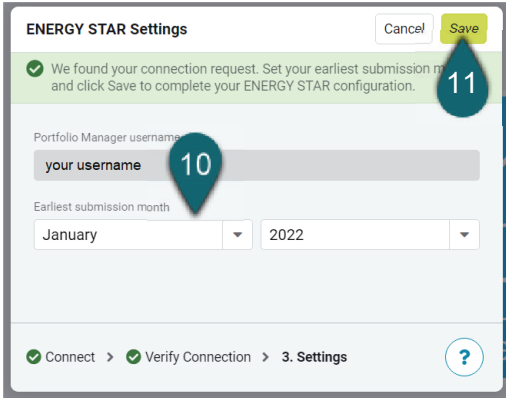
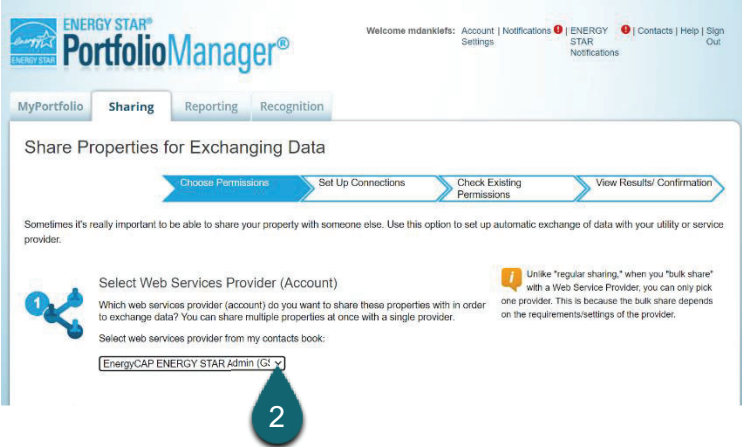
Purpose	By the end of this job aid you will be able to link an account and building in EnergyCAP to an account and building in ENERGY STAR® Portfolio Manager®.
Audience	EnergyCAP customers and PSE users.

	<p>Link an EnergyCAP account to an ENERGY STAR® Portfolio Manager® account</p>
	<p>1 Select a building in EnergyCAP.</p> <p>2 Click the building's ENERGY STAR tab.</p> <p>3 Click the Get Started button.</p>
	<p>4 Click the Start Connection Request button.</p> <p>(Note: If you do not yet have an ENERGY STAR® Portfolio Manager® account, follow the steps shown to Create a Portfolio Manager Account.</p> <p>Or see 2a_JobAid_EnergySTAR-AddProperty to add a property in Energy Star.)</p>

EnergyCAP: Link an account and a building to ENERGY STAR® Portfolio Manager®, continued

	<p>5</p>	<p>Enter your username and password.</p>
	<p>6</p> <p>7</p>	<p>Click the Agreement Terms of Use check box.</p> <p>Click the Send Connection Request button.</p>
	<p>8</p> <p>9</p>	<p>In EnergyCAP, enter your ENERGY STAR® Portfolio Manager® username.</p> <p>Click Verify.</p>

EnergyCAP: Link an account and a building to ENERGY STAR® Portfolio Manager®, continued

	<p>10</p>	<p>Select the Earliest submission month and year for which you would like EnergyCAP to submit data.</p>
	<p>11</p>	<p>Click Save.</p>
		<p>Link an EnergyCAP building to an ENERGY STAR® Portfolio Manager® building</p>
	<p>1</p>	<p>Click the Share Properties button.</p>
	<p>2</p>	<p>On the Share Properties for Exchanging Data page, select EnergyCAP ENERGY STAR Admin from the Web Services Provider drop-down menu.</p>

EnergyCAP: Link an account and a building to ENERGY STAR® Portfolio Manager®, continued

2 Select Properties

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

Select Properties

Selected Properties: 0

3

3 Click Select Properties.

Select Properties

Search

<input checked="" type="checkbox"/>	Name	Property Type	State/Province
<input checked="" type="checkbox"/>	Building 1	Retail Store	WA
<input checked="" type="checkbox"/>	Building 2	Restaurant	WA
<input checked="" type="checkbox"/>	Building 3	Fast Food Restaurant	WA
<input checked="" type="checkbox"/>	Building 4	Pre-school/Daycare	WA
<input checked="" type="checkbox"/>	Building 5	Personal Services (Health/Beauty, Dry Cleaning, etc.)	WA
<input checked="" type="checkbox"/>	Building 6	Restaurant	WA
<input checked="" type="checkbox"/>	Building 7	Personal Services (Health/Beauty, Dry Cleaning, etc.)	WA
<input checked="" type="checkbox"/>	Building 8	Other - Recreation	WA
<input checked="" type="checkbox"/>	Building 9	Retail Store	WA

Filter Properties (9)

Filter by Property Type

- Fast Food Restaurant (1)
- Other - Recreation (1)
- Personal Services (Health/Beauty, Dry Cleaning, etc.)

Filter by Construction Status

- Existing (3)
- Test (6)

Filter by State/Province

- Washington (9)

Filter by Shared from

- None - My Properties (PDA) (9)

First Previous Page 1 of 1 Next Last 100

Selected Properties 9 (View Selection)

Apply Selection Cancel

4

5

4 Select all properties.

5 Click Apply Selection.

Selected Properties: 1

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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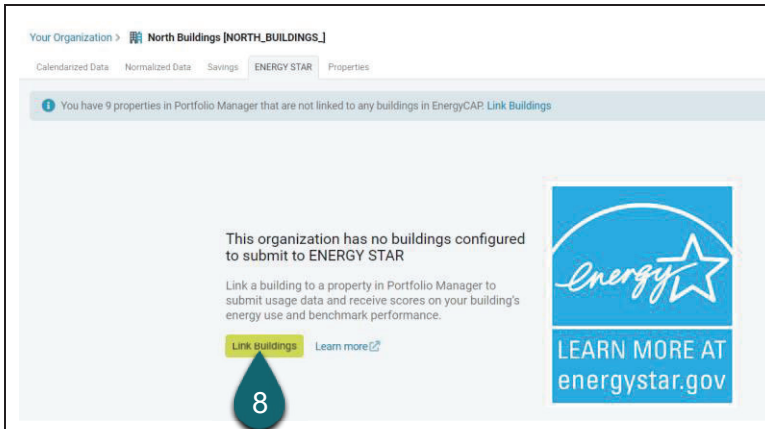
6

7

6 Select Bulk Sharing, Exchange Data Full Access.

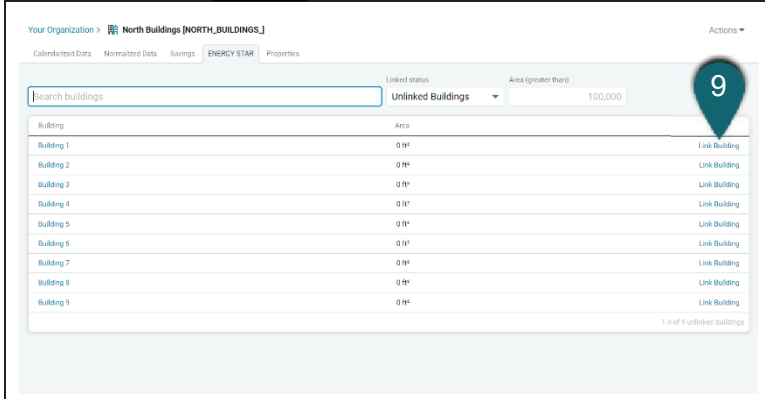
7 Click Authorize Exchange.

EnergyCAP: Link an account and a building to ENERGY STAR® Portfolio Manager®, continued



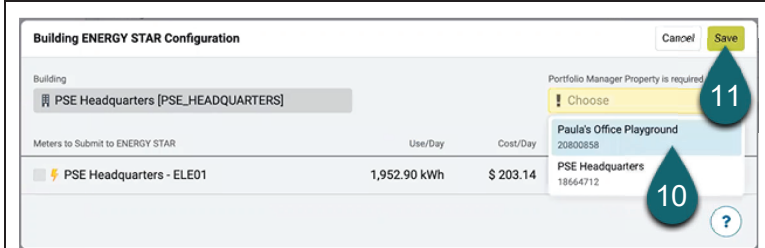
8

Click the **Link buildings** button.



9

Locate the building you are linking in the list and click **Link Building**.



10

Select the property in the Portfolio Manager drop down list on the right.

11

Click **Save**.