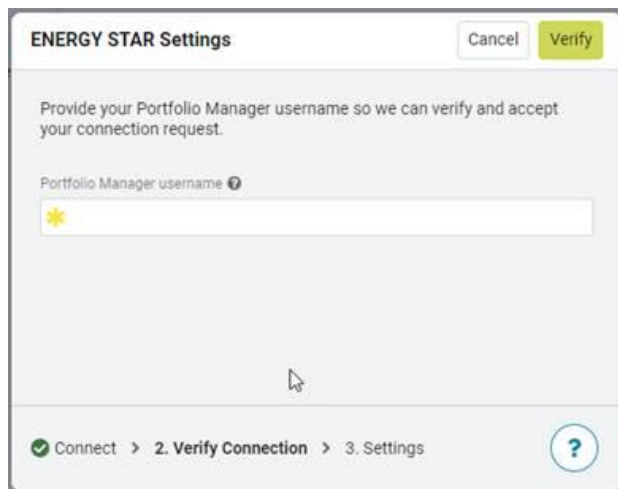


## EnergyCAP®: ENERGY STAR® Connection.

**For existing MyData customers** who did not provide PSE with “Share Forward” access prior to the MyData to EnergyCAP® changeover, customers should follow the EnergyCAP Wizard, the built-in, step-by-step process to link their database to ENERGY STAR® Portfolio Manager®. Customers can launch the Wizard from the ENERGY STAR tab, available on any building or organization within EnergyCAP. This Wizard will provide you with the following steps:

- **Send a connection request to EnergyCAP’s Portfolio Manager account named “EnergyCAP ENERGY STAR Admin”**
  - o Follow the Wizard step-by-step process in EnergyCAP to setup ENERGY STAR Portfolio Manager.
  - o Alternatively, here is a [direct link](#) that you can use to send a connection request to EnergyCAP via ENERGY STAR Portfolio Manager:
- **Enter your Portfolio Manager username into EnergyCAP to link your database to your Portfolio Manager account:**



ENERGY STAR Settings

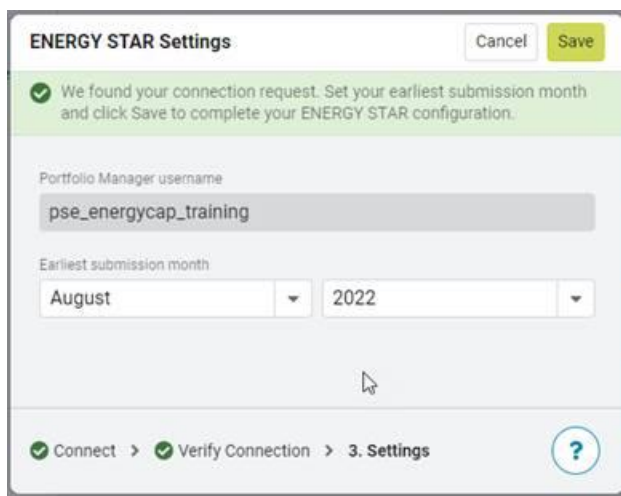
Cancel Verify

Provide your Portfolio Manager username so we can verify and accept your connection request.

Portfolio Manager username

Connect > 2. Verify Connection > 3. Settings

- **Set the “Earliest submission month” to August 2022 to ensure that there are no gaps between data previously submitted via MyData and data submitted via EnergyCAP.**



ENERGY STAR Settings

Cancel Save

✓ We found your connection request. Set your earliest submission month and click Save to complete your ENERGY STAR configuration.

Portfolio Manager username

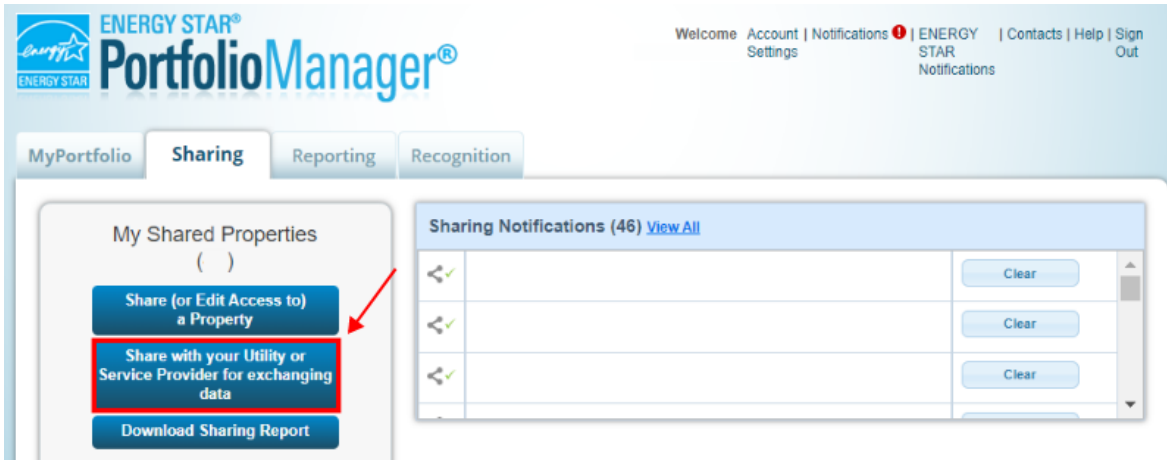
pse\_energycap\_training

Earliest submission month

August 2022

Connect > ✓ Verify Connection > 3. Settings

- **After completing these steps, you must share your properties with EnergyCAP in Portfolio Manager:**
  - o Click [here](#) for a direct link to the Sharing screen in Portfolio Manager:
    - Select the “EnergyCAP ENERGY STAR Admin” Account
    - Select all properties
    - Choose “Bulk Sharing (Simple Option)” and “Exchange Data Full Access” (picture included below)



**1** Select Web Services Provider (Account)

Which web-services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.

Select web-services provider from my contacts book:

EnergyCAP ENERGY STAR Admin (G: ▼)

**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: 7

**3** 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

Unlike "regular sharing," when you "bulk share" with a Web Service Provider, you can only pick one provider. This is because the bulk share depends on the requirements/settings of the provider.

After completing these steps, the buildings/meters migrated from MyData should be automatically matched with Portfolio Manager (you will NOT need to match buildings and meters). Data will begin submitting to ENERGY STAR automatically during the next nightly run.

Below are two EnergyCAP resources for your reference:

- [EnergyCAP Help Center](#): Configuring an ENERGY STAR connection in EnergyCAP.
- [EnergyCAP Guide](#): Additional EnergyCAP features.

# # #