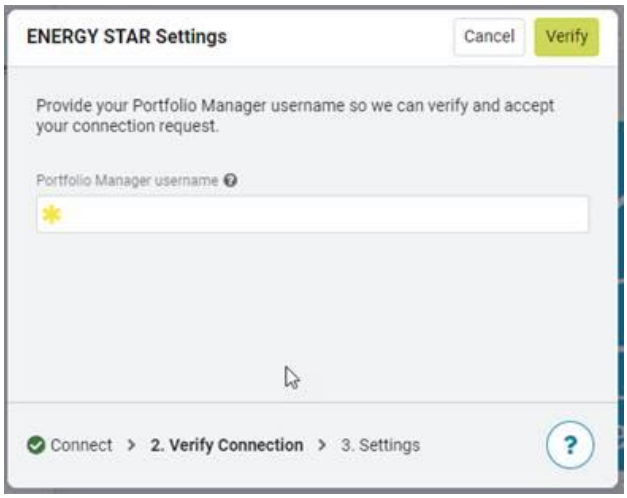
EnergyCAP®: ENERGY STAR® Connection.

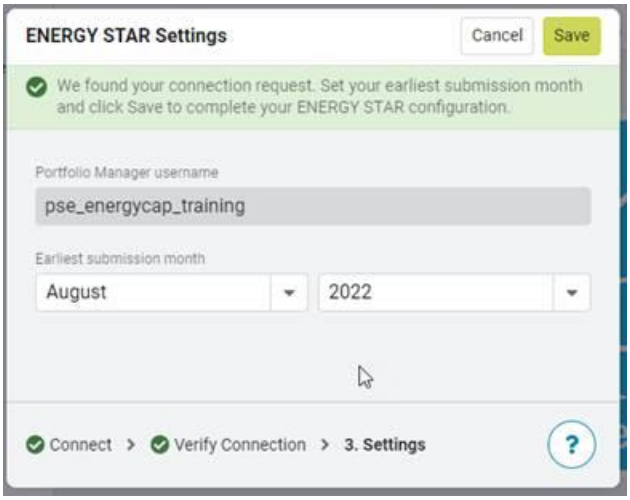
For existing MyData customers who did not provide PSE with "Share Forward" access prior to the MyData to EnergyCAP® changeover, customers should follow the EnergyCAP Wizard, the built-in, step-by-step process to link their database to ENERGY STAR® Portfolio Manager®. Customers can launch the Wizard from 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"**
    - Follow the Wizard step-by-step process in EnergyCAP to setup ENERGY STAR Portfolio Manager.
    - Alternatively, here is a direct link that you can use to send a connection request to EnergyCAP via ENERGY STAR Portfolio Manager:

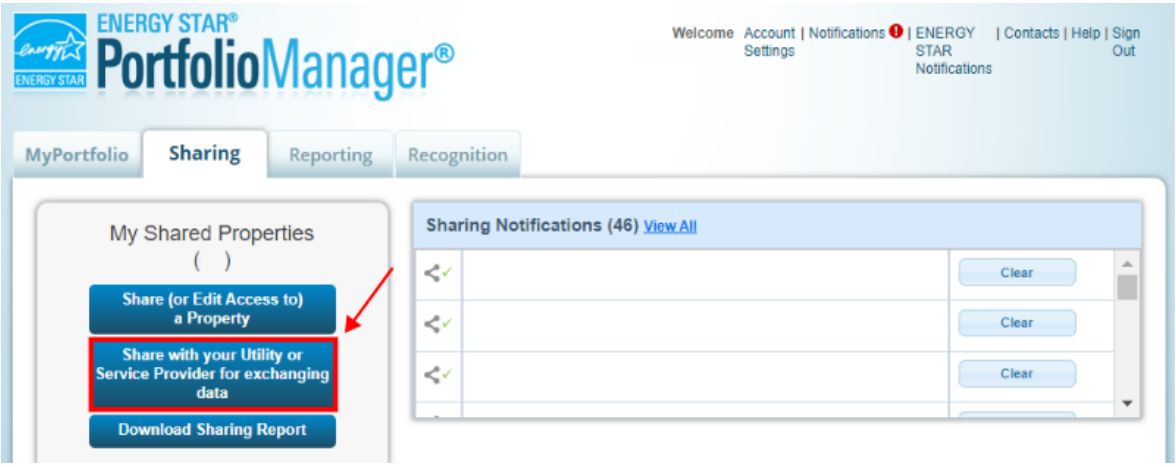
- **Enter your Portfolio Manager username into EnergyCAP to link your database to your Portfolio Manager account:**

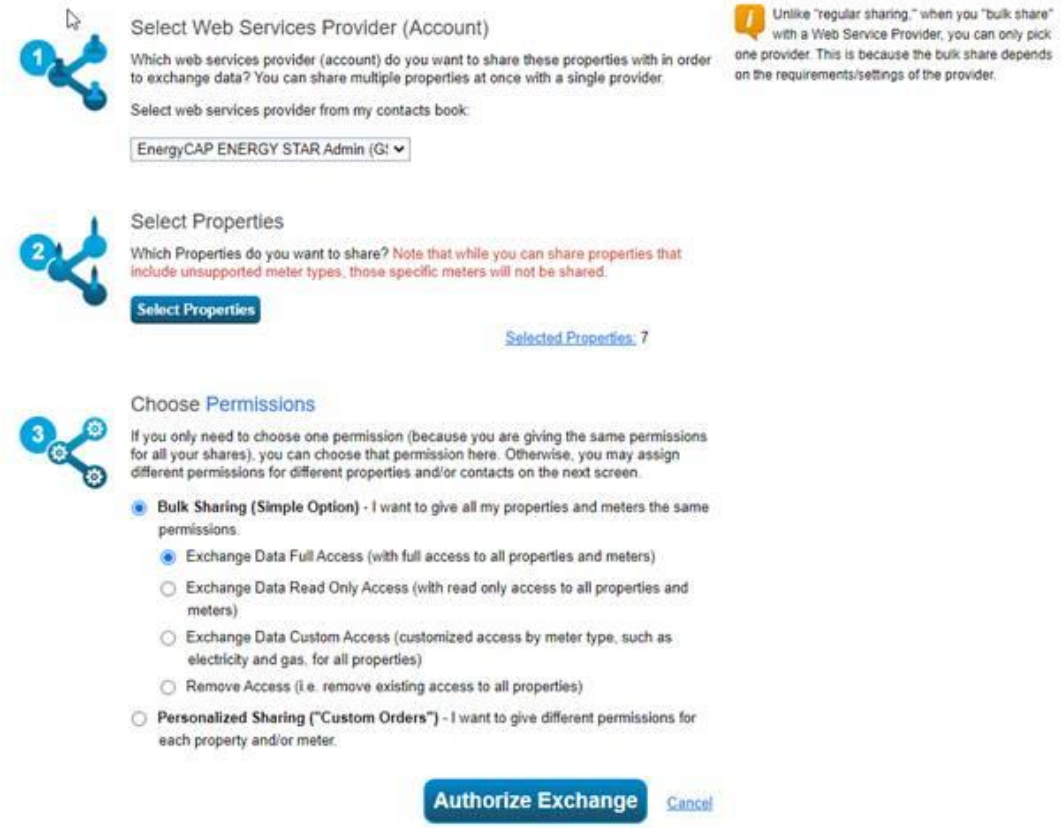


- **Set the "Earliest submission month" to August 2022 to ensure that there are no gaps between data previously submitted via MyData and data submitted via EnergyCAP.**



- **After completing these steps, you must share your properties with EnergyCAP in Portfolio Manager:**
    - 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)





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.

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