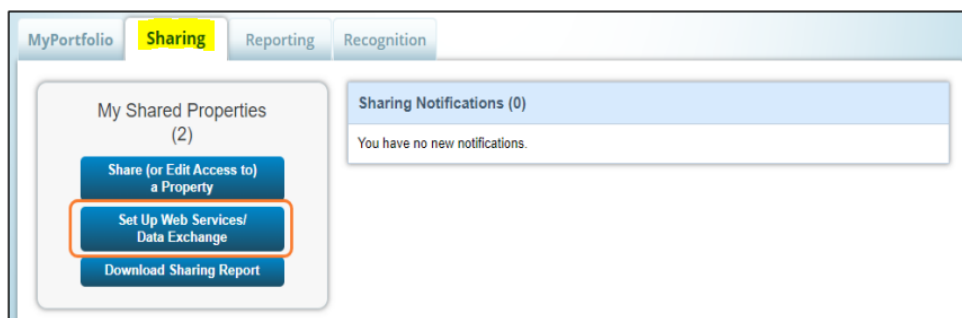


Guide 4: Configuring Share Access for EnergyCAP in Energy Star Portfolio Manager

In order for data to flow smoothly from ECAP to ESPM, we need to make sure the EnergyCAP contact within ESPM has full permission access. After you receive the email confirmation from EnergyCAP that your account is connected to EnergyCAP's Portfolio Manager account, the next step is to share your property(ies) with EnergyCAP's account.

Step 1: Select the Sharing tab within PM. Select the Set Up Web Services/Data Exchange option from your account's Sharing tab.



Step 2:

A new screen will appear called "Share Properties for Exchanging Data":

- Select EnergyCAP ENERGY STAR Admin (GSS_ENERGYCAP) as the Web Services Provider
- Select One Property, Multiple Properties, or All Properties to be shared with EnergyCAP
- Select Bulk Sharing (Simple Option) and Exchange Data Full Access (with full access to all properties and meters)
- Click the Authorize Exchange button. In most cases when a building or meter is shared with EnergyCAP, the connection should be approved with 5-10 minutes.

Share Properties for Exchanging Data Screen:

MyPortfolio

Sharing

Reporting

Recognition

Share Properties for Exchanging Data

Choose Permissions

Set Up Connections

Check Existing Permissions

View Results/Confirmation

Sometimes it's really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

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...)

!

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.

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.**

All Properties

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

A green banner confirms that you have successfully shared access to your properties. Click Close. NOTE: This process may take some time to complete. After EnergyCAP has accepted your sharing request, your PM properties and meters will be available for linking within EnergyCAP. This process typically takes 5-10 minutes. You will not receive an email when this type of connection request is accepted.

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MyPortfolio

Sharing

Reporting

Recognition

Bulk Share Properties for Exchanging Data: Results

Choose Permissions

Set Up Connections

Check Existing Permissions

View Results/Confirmation

✓

Congratulations! You have successfully shared/edited access to your property(ies).

A total of 2 share requests were sent.

If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

Close

