Instructions for Sharing Data for Port of San Diego Utility Data Aggregation

Sharing data through ENERGY STAR® Portfolio Manager® is a three step process: (1) connect with the data aggregator, (2) the aggregator accepts the connection, and (3) share your property.

1. Connect
   a. **Login** into ENERGY STAR® Portfolio Manager® at:  
      https://portfoliomanager.energystar.gov/pm/login.html
   b. On the upper right hand side of the page, click on **Contacts**.
   c. In the search field box, enter `sdport-edisonenergy` and click **Search for new contacts**
   d. Click on the **Connect** button to the right of Port Benchmarking Account Port of San Diego with Edison Energy
   e. Select Agreement check box “I agree …”, then click **Send Connection Request**.
      You should get a new page with a green box near the top that reads “You have successfully sent a connection request …”

2. Aggregator accepts connection
   a. Edison Energy will accept your connection request within X business days.
   b. When the connection request is accepted, you will have a Notification on your Portfolio Manager home screen (MyPortfolio screen) which states “You are connected to Port Benchmarking Account.”
   Now you can proceed to step 3.

3. Share property
   a. **Login** into ENERGY STAR Portfolio Manager.
   b. Click on the **Sharing** tab.
   c. Click on the **Share (or Edit Access to) a Property** button.
   d. Share Properties (Three Options):
      i. Share **One Property**
         On the **Select Number of Property(ies)** dropdown menu, select **One Property**.  
         A second dropdown menu will appear. Select your Port property.
      ii. Share **Multiple Properties**
         On the **Select Number of Property(ies)** dropdown menu, select **Multiple Properties**.
         Then click on **Select Properties**. A pop-up screen will appear that allows you to select your Port properties and then click **Apply Selection**.
      iii. Share **All Properties**
         e. Under **Select People (Accounts)**, click on **Port Benchmarking Account (SDPort-EdisonEnergy)**.
         f. Under **Choose Permissions**, click the button next to **Personalized Sharing & Exchange Data (Custom Orders)”, then click **Continue**.
         g. Select the **Exchange Data** column button for your first property. A pop up window will appear.
         h. Click **all buttons** in the **Read Only Access** column. In the **Recognition** row, click the **None** button.  
            In the **Additional Options** section, click **No** for **Share Forward**. Note that Edison Energy will not share the property with any Portfolio Manager users outside of Edison Energy.
         i. Click the **Apply Selections & Authorize Exchange** button.
         j. Repeat steps g-i for all remaining properties.
         k. Then click the **Share Property(ies)** button.
         l. You will see a message on the next screen that says “You have successfully shared …”

Thank you, you have now successfully shared the property and its utility data with the data aggregator.