

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.