ENERGY STAR® Property Sharing with ASHE Energy to Care

Introduction:

In order to participate in the ASHE Energy to Care system (EtC) and transfer information on buildings and utility data from the ENERGY STAR® PortfolioManager system (PM), participants must set up a contact connection and data exchange share to the *talisen_ashe* account in PM and the ASHE *ASHE_E2C* account in PM.

Please note connections may be set up one of two ways for Energy to Care data sharing:

1) An 'Exchange Data Read Only' connection would be used for an initial import of data to EtC if PM will be the 'master' for new utility data entries and/or changes in property/utility meter information. Participants will be required to ***enter/maintain data within the ENERGY STAR® PM system*** ONLY going forward with this option, although data will be viewable in either system. When modifying property/building sync information in EtC, this would be the option identified as *ENERGY STAR® Managed/Energy to Care Visible*.

2) An 'Exchange Data Full Access' connection would be used when EtC is desired to be the 'master' of data. In that case, PM would no longer be used to enter data. The full-access designation allows EtC to write utility data and some basic location information back to PM for the purposes of viewing the data in either EtC or PM. When modifying property/building sync information in EtC, this would be the option identified as *Energy to Care Managed/ENERGY STAR® Visible*.

Once property shares are in place and they appear in EtC, while editing the sync information in EtC there is a third option available…*Energy to Care Managed*, which is used if EtC will be the only system used to view/maintain property and utility data. ENERGY STAR® scores will still be viewable within EtC but information is not available to users in PM, allowing participants to use EtC and see ENERGY STAR® scores without requiring an ENERGY STAR® PM account. Users do not need to set up ENERGY STAR® connections for buildings that fall under this category. When buildings are defined within EtC using bulk upload or new building requests within EtC, they are placed in this category by default.

> *IMPORTANT*: Buildings/properties that are defined initially in Energy to Care can NOT be linked back to *existing* properties in ENERGY STAR®! If not initially imported using a connection/share in PM, buildings originally created within EtC can only be exported as *new* properties in a connected ENERGY STAR® PM account.
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> EXCEPTION TO THE ABOVE: Any pre-defined buildings in EtC that were initially imported from ENERGY STAR® as part of the latest release of EtC rolled out in July 2019 *should* be linked in a read-only manner (ENERGY STAR® Managed/Energy to Care Visible).

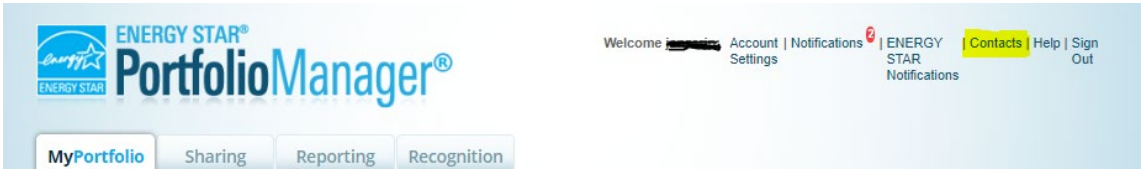
The remainder of this document outlines the steps to take both within the ENERGY STAR® PM system as well as ASHE's EtC system to set up the appropriate sharing of information after signing up for access to the EtC system. Please note, regardless of which method is used, PM participants must have share forward permissions within PM in order to set up a data sharing connection with EtC for the properties they will be sharing. Basically, if a user is able to add utility data within PM to the buildings they will be sharing, they should be able to set up a connection share, even if they were not the original defining user in PM of the property or utility

accounts under the property being shared with EtC. The sharing process must be done in 4 distinct separate stages.

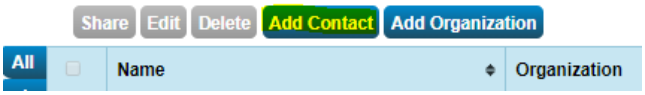
Stage 1: Set up Contact/Connection in PM with ASHE EtC PM data exchange account

This stage should only be performed once for a PM user prior to setting up an ENERGY STAR® connection within EtC.

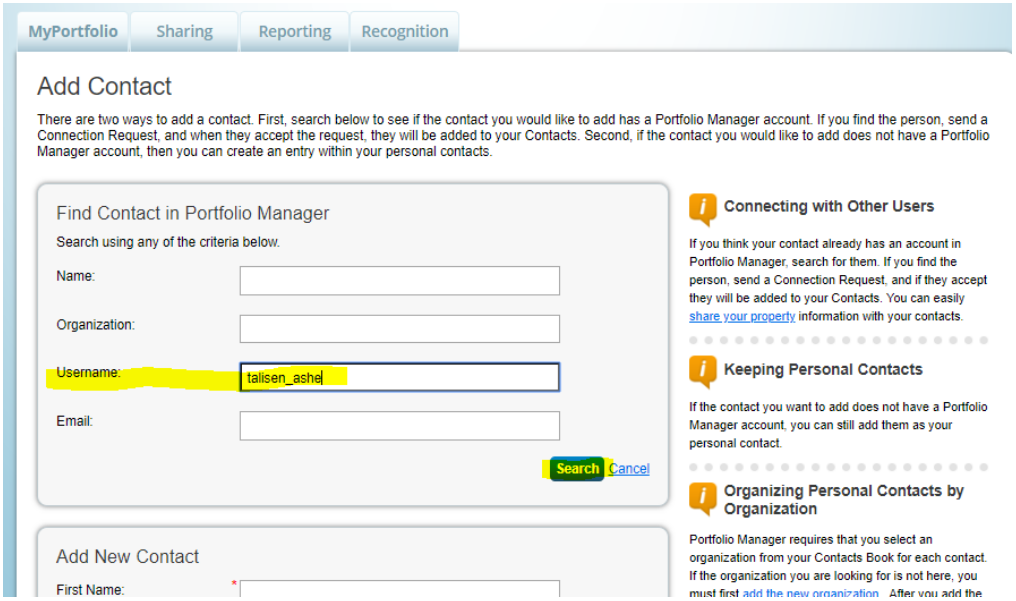
1) Log in to PM (https://portfoliomanager.energystar.gov/pm/). From the home page after logging in, select the 'Contacts' link from the top right of the page above the home panel (highlighted below).



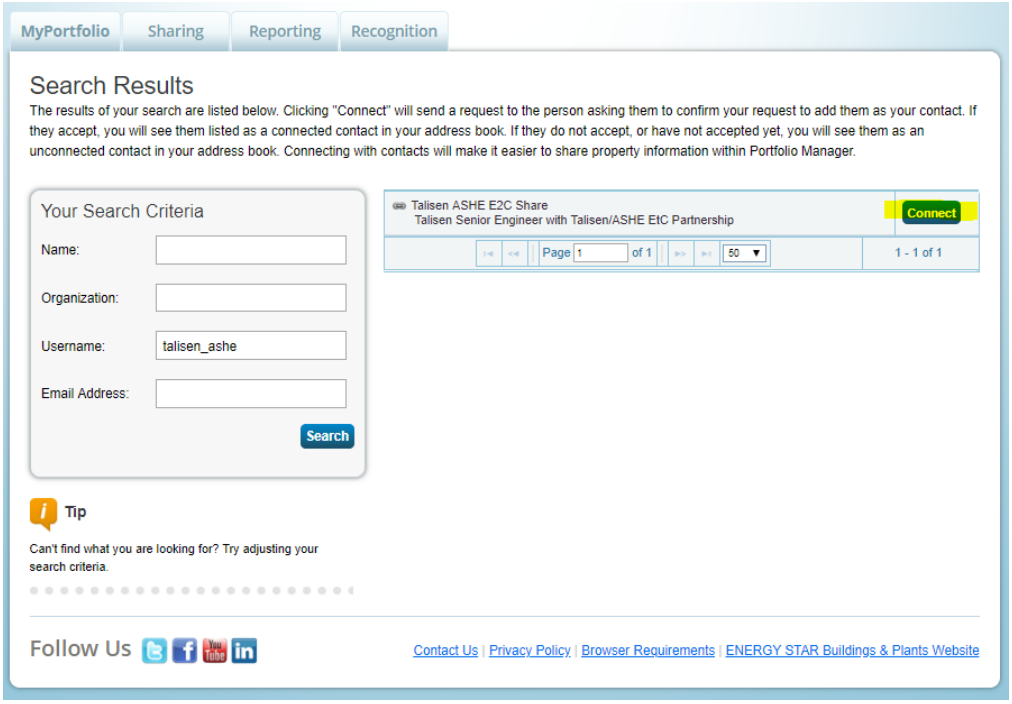
2) From the list of contacts that comes up, select the 'Add Contact' button that appears above or below the table listing your contacts:



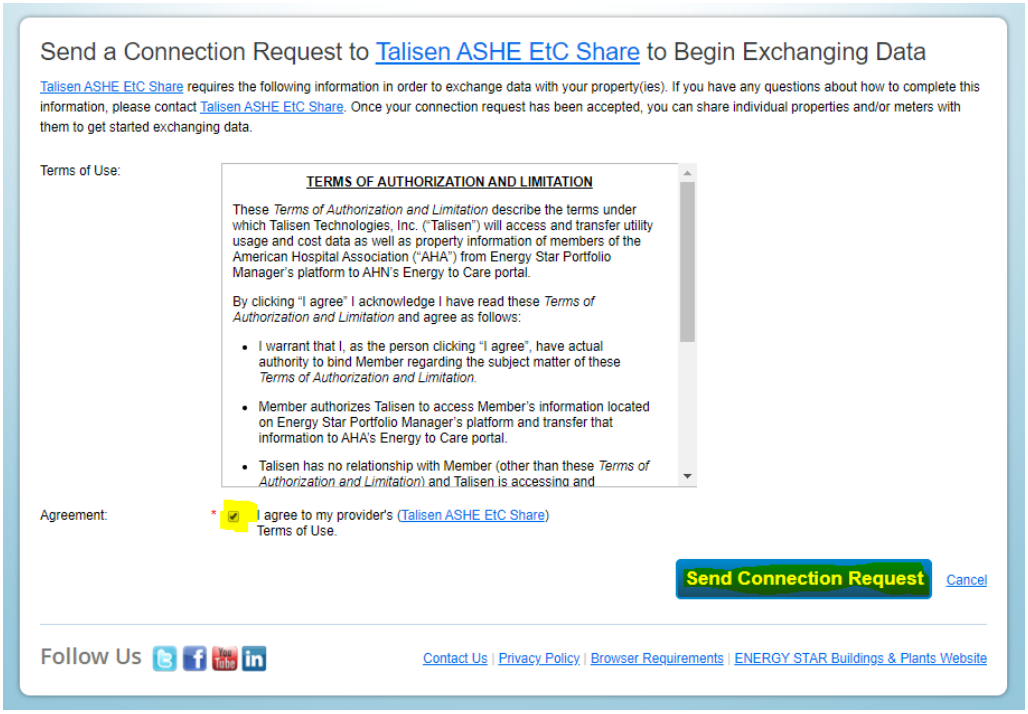
3) From the 'Find Contact in Portfolio Manager' section at the top of the page that comes up, enter 'talisen_ashe' as the Username field, then click the 'Search' button:



4) From the Search Results, click the 'Connect' button to initiate a connection request to the *Talisen ASHE E2C Share* account:



5) From the panel that comes up, review the terms of use and check the agreement checkbox, then select the 'Send Connection Request' button.



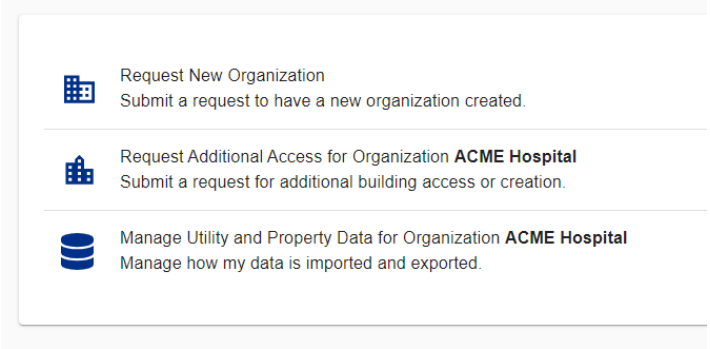
Stage 1 is complete. This stage only needs to be performed once, even if you are sharing multiple properties or need to set up a connections or additional property shares with EtC at some point in the future. Continue setup as directed in the Energy to Care system outlined in Stage 2 below before continuing with any additional PM changes.

Stage 2: Create/Define an ENERGY STAR® Connection in Energy to Care to your PM account.

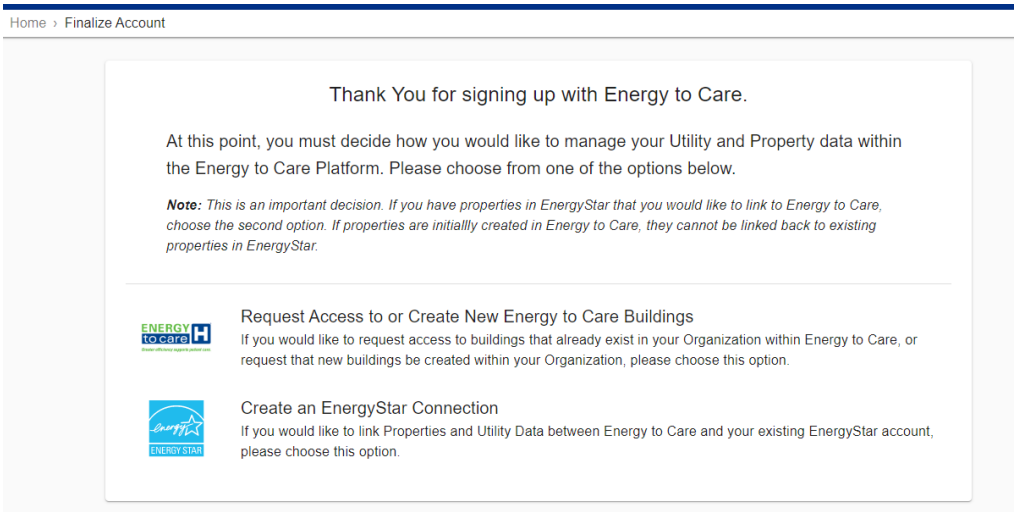
> NOTE: The connection request set up in Stage 1 will be accepted by the EtC system as part of Stage 2. Sharing properties within PM cannot be done until this connection is finalized (i.e., Stage 3 cannot occur until Stage 2 has been completed).

This stage should be performed at least once for a PM user prior to setting up property shares within PM. Separate connections will need to be defined in EtC for any PM accounts that are designated as the Property Data Administrator (PDA) of properties you attempt to share with EtC. If that user differs from your personal PM account, you MUST have 'share forward' access granted from the PDA in PM in order to define the ENERGY STAR® connection link in EtC and share those properties with EtC.

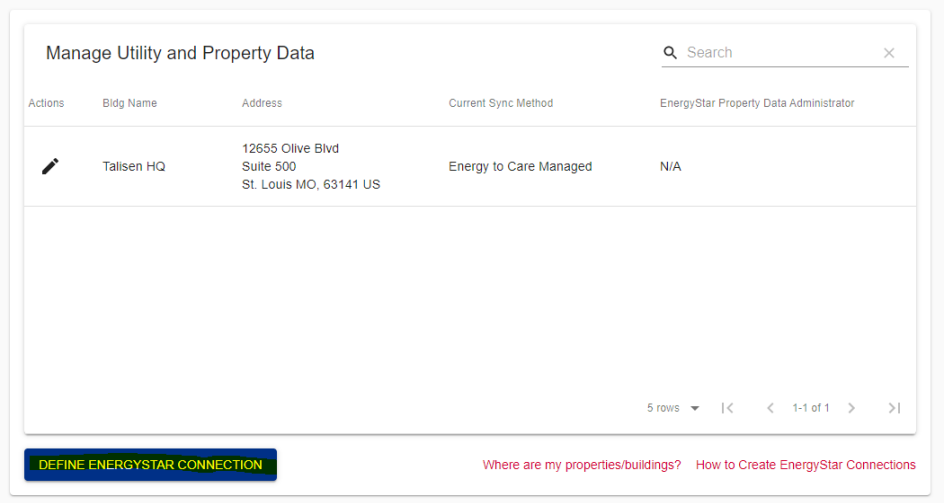
1) Log in to EtC (https://energytocare.talisenfim.com/acctreq/). From the home page after logging in, select the 'Manage Utility and Property Data for Organization XYZ' option (bottom one below).



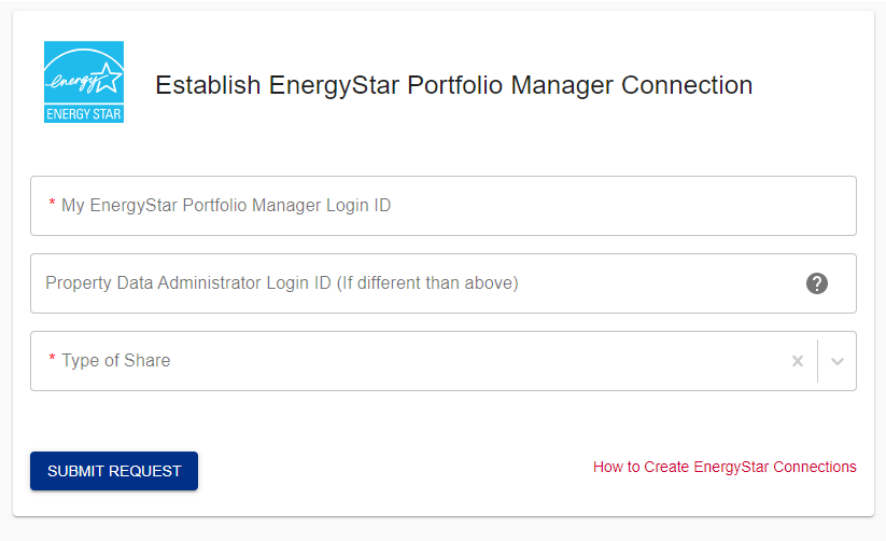
> NOTE: If you were redirected from an email for finalizing your account, you may see the panel below. In that case, select the 'Create an ENERGY STAR® Connection' option then continue with step 3.



2) From the Manage Utility and Property Data panel, click the Blue button at the bottom labeled “Define ENERGY STAR® Connection.”



3) Enter your PM username (login ID) in the top line. If you will be sharing properties that are administered by a different PM user (the PDA for the properties being shared with EtC), then include their username (PM login ID) on the middle line. If that user is you, leave the middle line blank. Select a type of share based on how you want to manage your data (as defined on page 1 of this document). Then submit your request by clicking the blue button at the bottom of the form.



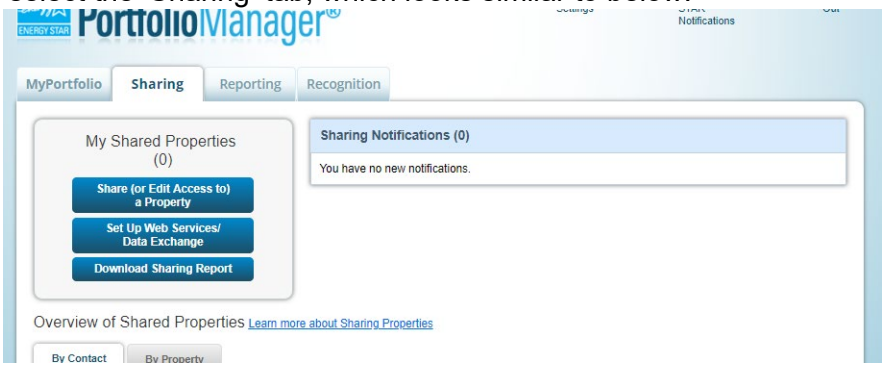
4) If the system finds your connection request, a successful message will be shown after a few seconds. Otherwise, an error message will appear. Follow the directions before re-submitting.

5) Upon successful completion, continue with Stage 3 to set up shares of properties within PM.

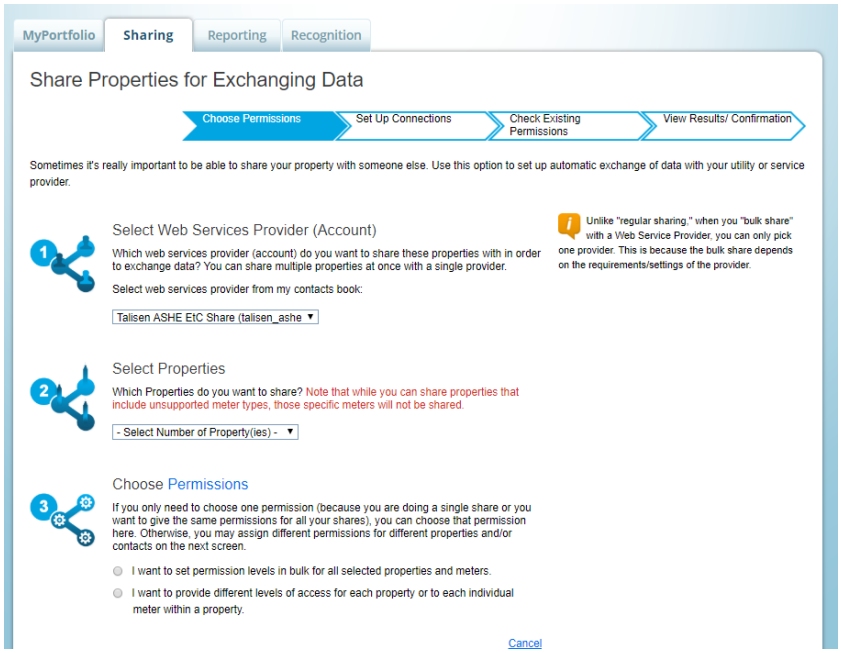
Stage 3: Set up Data Exchange of Properties/Utility Data with EtC

These steps should be taken any time you want to share one or more properties with EnergyToCare and be able to view data in either EtC or PM. This cannot be done until Stage 2 has completed successfully for connecting your PM account to EtC. You should be able to see a notification within PortfolioManager that your connection to the EnergyToCare 'talisen_ashe' user is in place before setting up properties for data exchange.

1) Log in to PM (https://portfoliomanager.energystar.gov/pm/). From the home page after logging in, select the 'Sharing' tab, which looks similar to below:



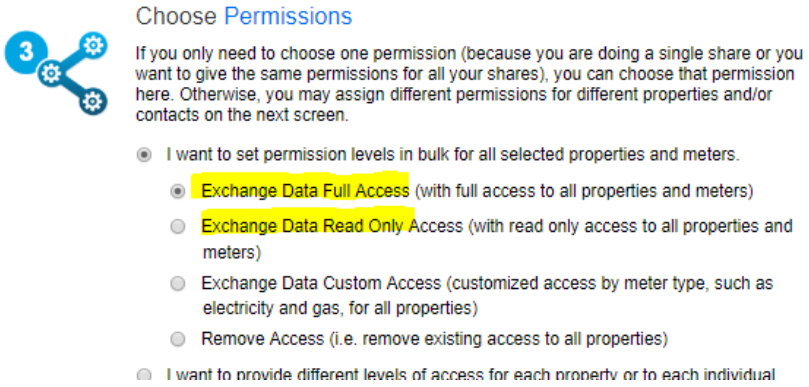
2) Click the middle button in the top left, labeled "Set up Web Services/Data Exchange." This will bring up the panel shown below:



3) If it is not pre-selected, select 'Talisen ASHE EtC Share (talisen_ashe)' as the Web Services Provider (Account) with which to set up a share. If you have set up other web service shares, there may be a different option pre-selected. If your connection request has not yet been accepted by EtC (performed as part of Stage 2), it will not be listed as an option and you will need to restart this stage at a later point in time after EtC has accepted the connection request.

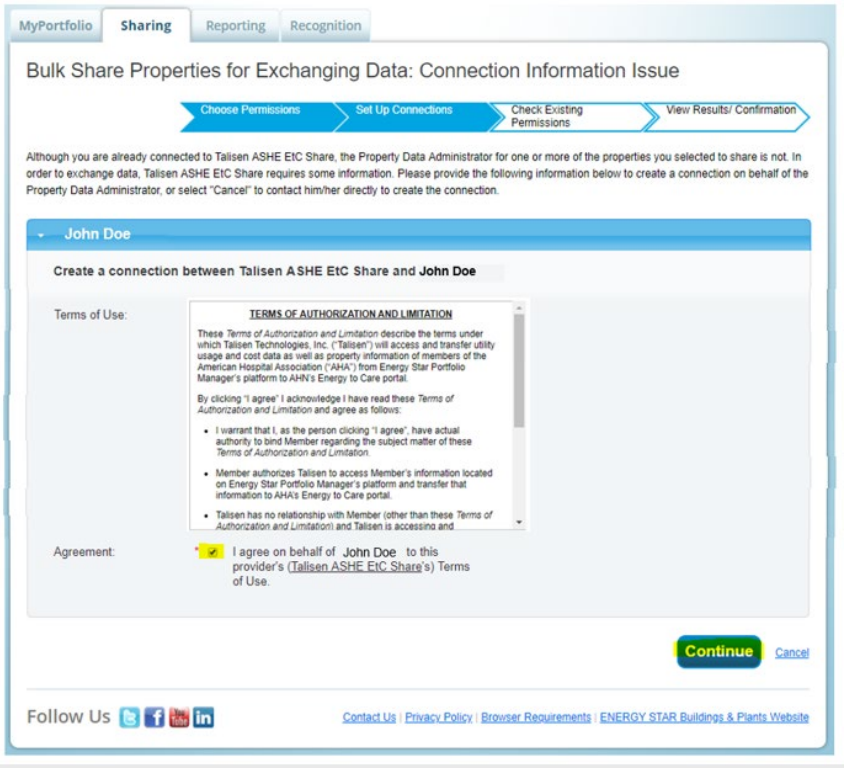
4) Select the ES PM properties you wish to share with the EtC system.

5) Under 'Permissions,' select the top option, which will bring up a sub-menu of options. Choose either the first or second Exchange option depending on how you specified/will specify sync'ing with PortfolioManager when you sign/signed up for access to the EnergyToCare system:

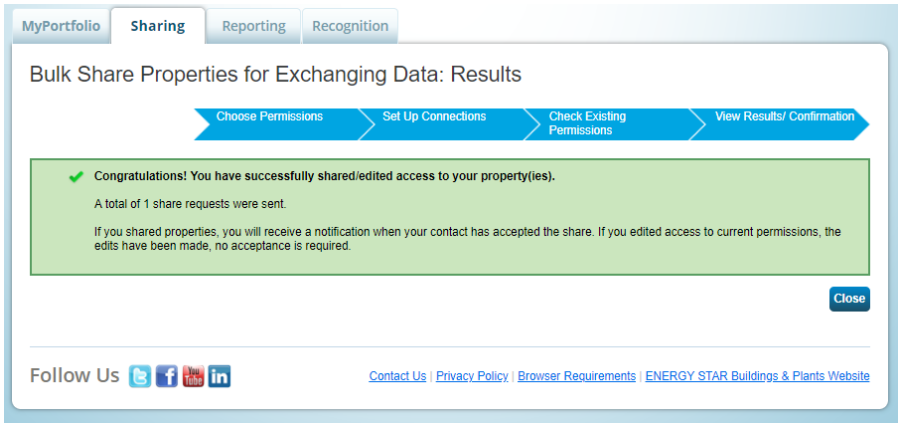


6) Once selections are in place, click the 'Authorize Exchange' button at the bottom of the panel.

7) At this point, if any one or more of the properties being shared is 'owned' by another user in PM, the screen below will appear, which requires you to set up a connection to the original owner/definer of the property in PM. That user will be notified of this request, but will not need to take any action….you are doing that for them in this step. Check the 'Agreement' checkbox and then select the 'Continue' button in that order.



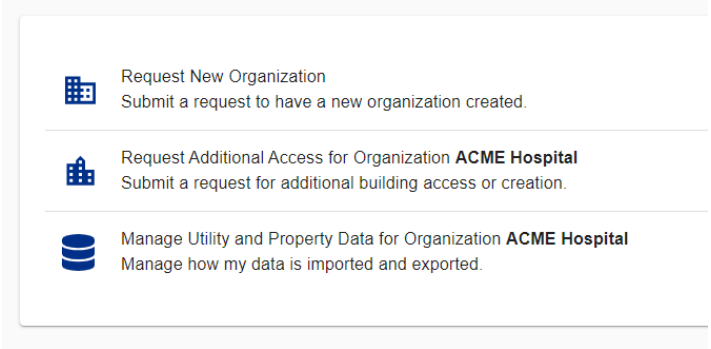
Once the continue button has been selected, or if all the properties being shared were originally created by you in PM after the conclusion of the prior step, the following panel should appear, indicating the conclusion of this stage.



Stage 4: Finalize/Verify Property Data Import within EtC

The final steps in setting up property shares between PM and EtC must be taken within EtC after completion of Stage 3. These final steps will import the information shared from PM into the EtC system.

1) Log in to EtC (https://energytocare.talisenfim.com/acctreq/). From the home page after logging in, select the 'Manage Utility and Property Data for Organization XYZ' option (bottom one below).



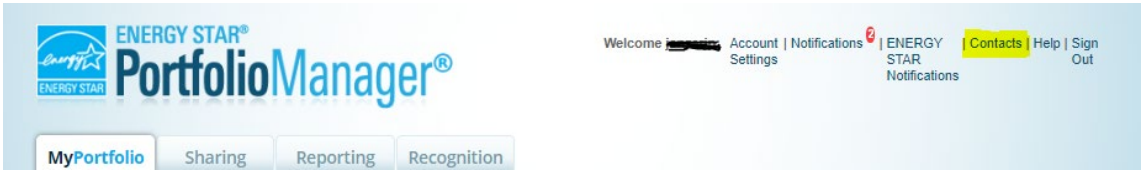
2) From the Manage Utility and Property Data panel, an additional blue button should now be seen at the bottom labeled "Refresh Properties From ENERGY STAR®." Click that button and wait a few seconds for the display to update. Shared properties that were successfully found will be added to the displayed list of buildings. If they do not appear, click on the "Where are my properties/buildings?" link and follow the action noted.

This completes the setup process. If you experience problems getting shares in place from ENERGY STAR® that are not resolvable by following this procedure, contact the Energy to Care Help Desk at (877)-317-7783.

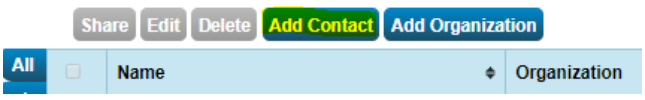
Stage 5: Utilize a similar process for connecting to ashe_e2c.

This stage should only be performed once for a PM user prior to setting up an ENERGY STAR® connection within EtC.

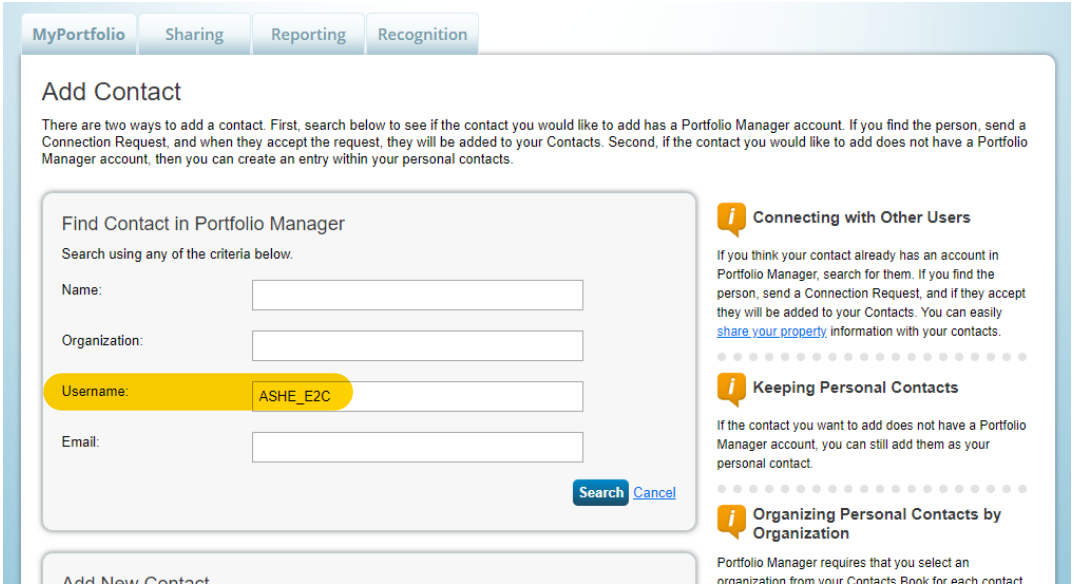
1) Log in to PM (https://portfoliomanager.energystar.gov/pm/). From the home page after logging in, select the 'Contacts' link from the top right of the page above the home panel (highlighted below).



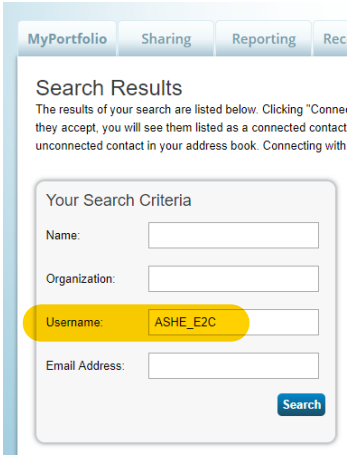
2) From the list of contacts that comes up, select the 'Add Contact' button that appears above or below the table listing your contacts:



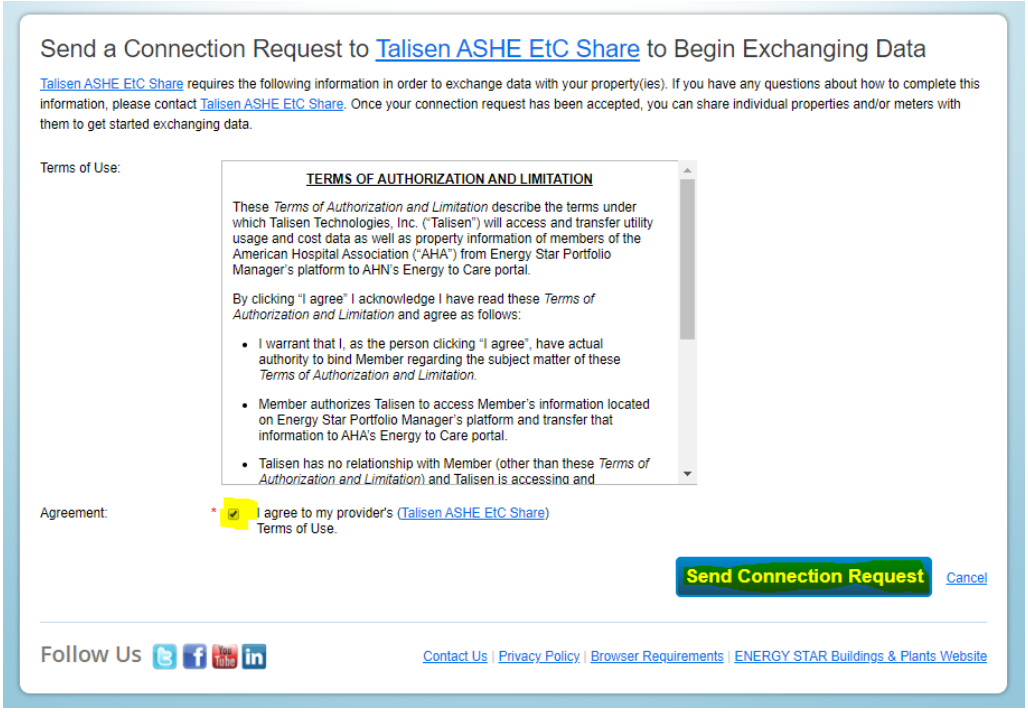
3) From the 'Find Contact in Portfolio Manager' section at the top of the page that comes up, enter 'ASHE_E2C' as the Username field, then click the 'Search' button:



4) From the Search Results, click the 'Connect' button to initiate a connection request to the *ASHE_E2C Share* account:



5) From the panel that comes up, review the terms of use and check the agreement checkbox, then select the 'Send Connection Request' button.

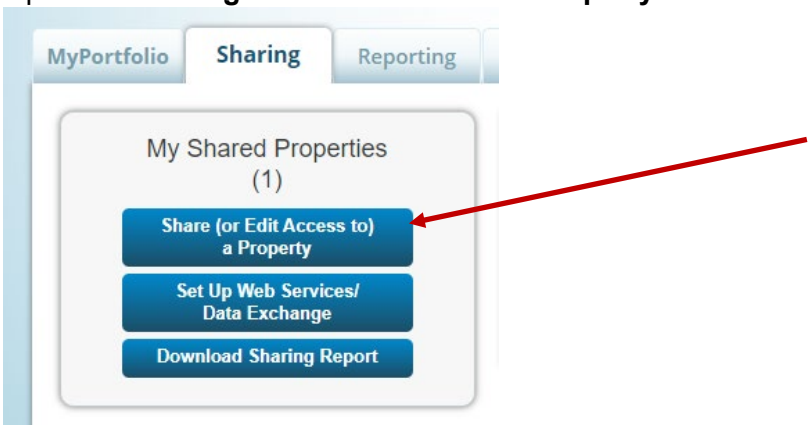


Stage 5 is complete. This stage only needs to be performed once, even if you are sharing multiple properties or need to set up a connections or additional property shares with EtC at some point in the future. Continue setup as directed in the Energy to Care system outlined in Stage 6 below before continuing with any additional PM changes.

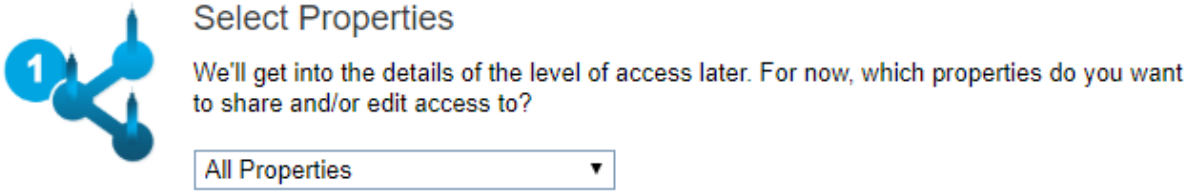
Stage 6: Sharing your property with ASHE_E2C

This stage should only be performed once for a PM to share data with the ASHE Energy to Care staff.

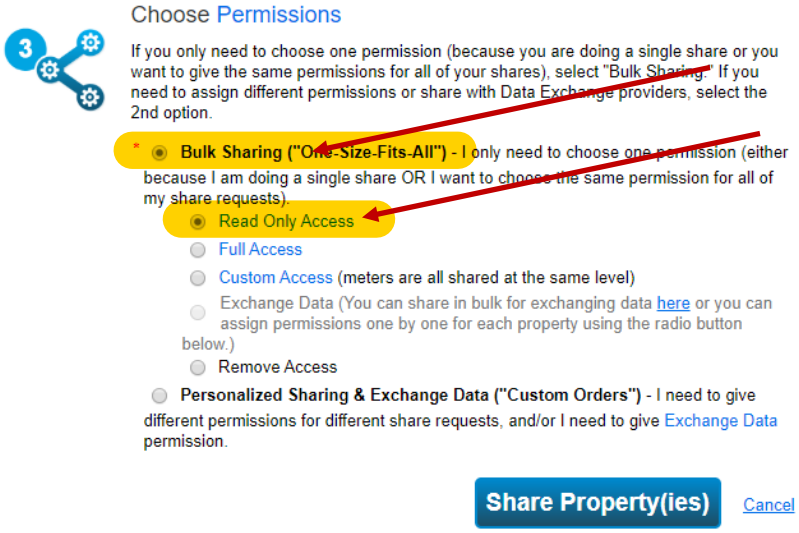
1) Open the **Sharing** tab and click **Share a Property**



2) Select **All Properties**, unless you have properties (i.e., facilities) that will not be participating in the Energy to Care program. In this case, choose one or multiple properties.



3) Select Accounts - Select **ASHE_E2C**
4) Choose Permissions - Select **Bulk Sharing**, **Read Only Access**



5) Click **Share Properties**.
6) This completes the setup process for sharing properties with ASHE. If you experience problems getting shares in place from ENERGY STAR® that are not resolvable by following this procedure, contact the Energy to Care Help Desk at (877)-317-7783.