Connecting Portfolio Manager to Resource Advisor

The following describes the process for connecting a Rocky Mountain Power customer with an existing ENERGY STAR® Portfolio Manager® account to Resource Advisor, using ENERGY STAR link functionality. *Please note, this connection process will work best when you use the <u>most current version</u> of your preferred Internet Browser (Microsoft Internet Explorer, Google Chrome, Mozilla Firefox, etc.)*

Rocky Mountain Power partners with Schneider Electric to provide electrical usage data to Portfolio Manager via Resource Advisor. If you need assistance with this process, please reach out for support to portfoliomanagersupport@ems.schneider-electric.com.

Portfolio Manager and Resource Advisor – Exchanging Data

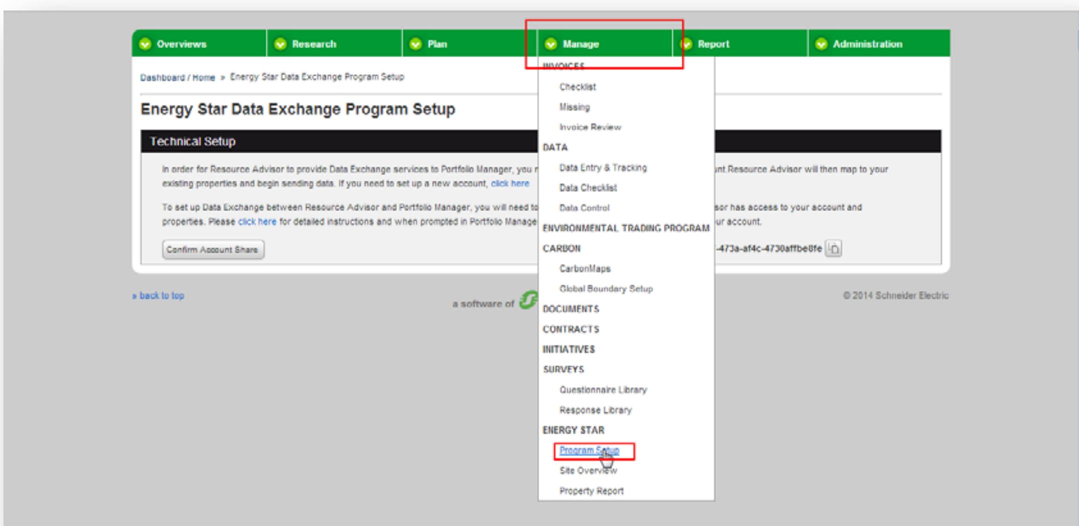
It will be necessary to establish a connection in your existing ENERGY STAR Portfolio Manager (PM) account to Schneider Electric's Web Services account. This process establishes the "electronic handshake" between the two platforms and creates a connection between your PM account and Schneider Electric's Resource Advisor platform.

In the steps below, portions of the process will take place in Portfolio Manager and, others in Resource Advisor. Steps undertaken by the customer in Portfolio Manager are denoted with blue headings and those taking place within Resource Advisor will be denoted by green headings.

Step 1

Start Connection Setup in Resource Advisor

1. Login to Resource Advisor and navigate to the **Manage** tab. Click **Program Setup** under the ENERGY STAR heading.



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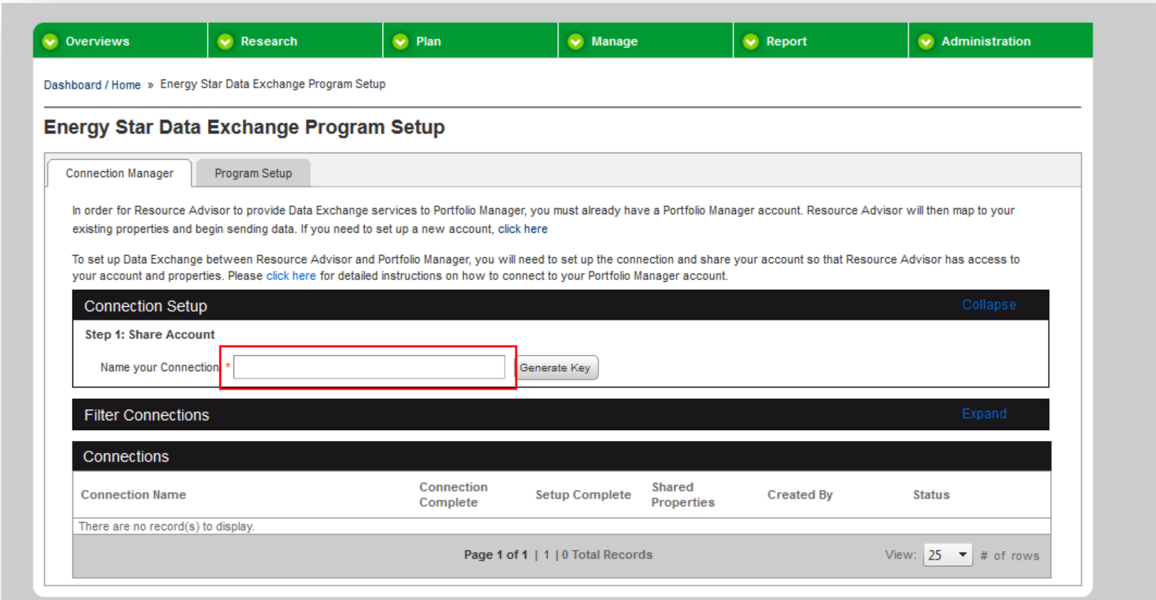
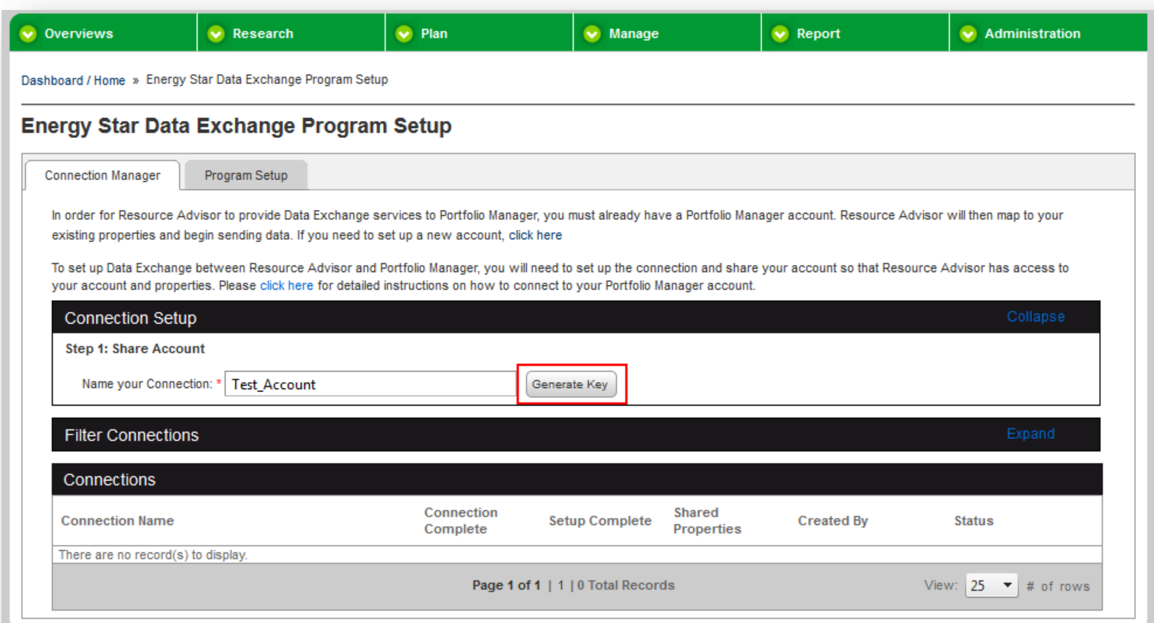
Connecting Portfolio Manager to Resource Advisor

2. You'll want to name your connection with a name you will recognize. It can be the same as your Portfolio Manager login, or something that makes sense to your organization – for example a building name or some other identifier.



3. Click **Generate Key** after typing in a name.



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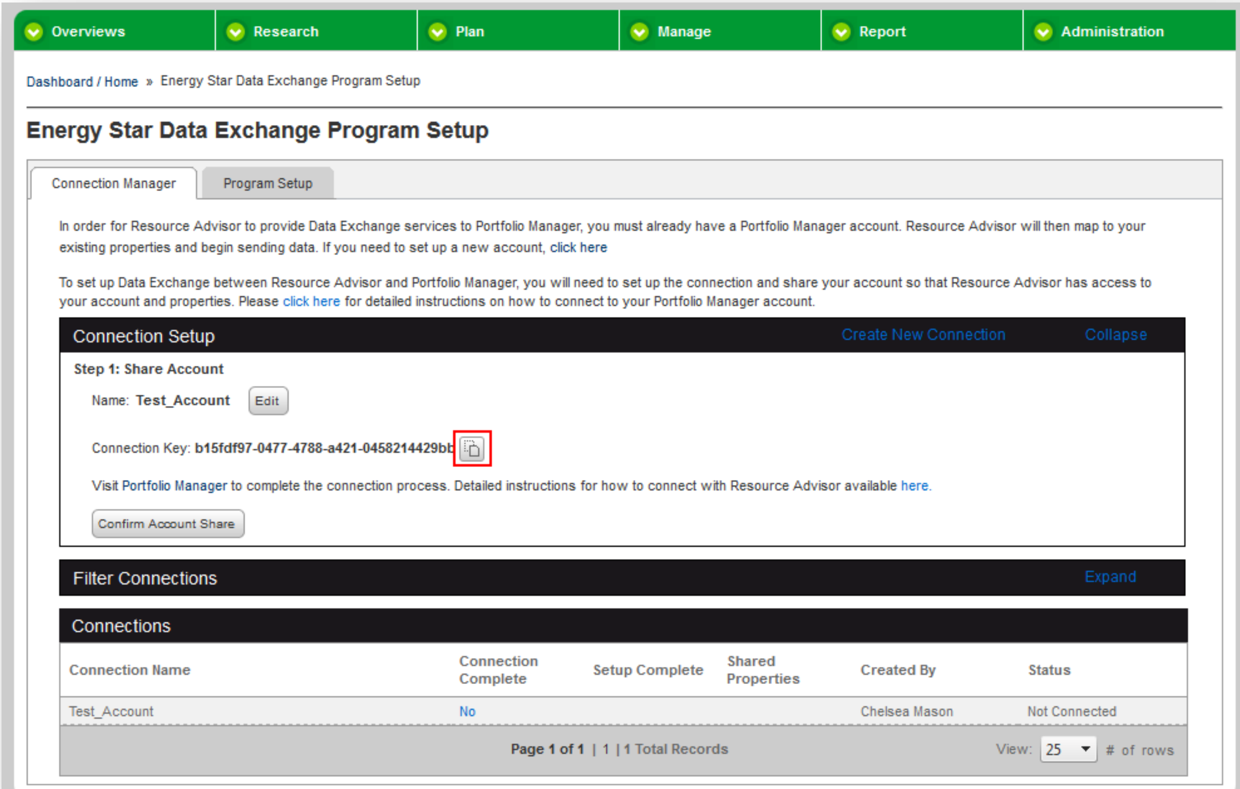
Connecting Portfolio Manager to Resource Advisor

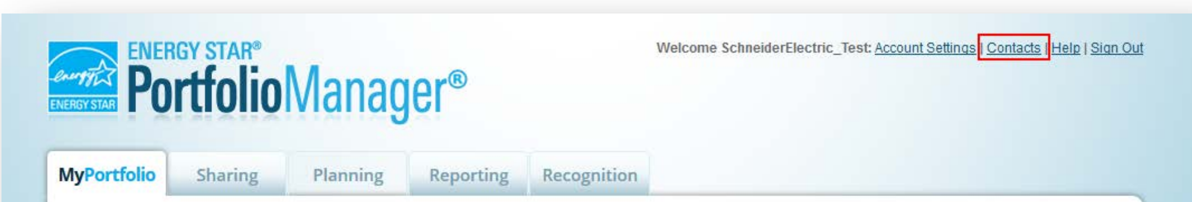
4. When the Connection Key appears, copy it by clicking the **copy icon**. Follow the instructions to copy the entire Connection Key. Leave this page/connection open.



Step 2

Add Schneider Electric as a Contact to your Portfolio Manager Account

1. Log in to your Portfolio Manager account.
    a. Note: If you do not have an existing PM account please follow the sign-up instructions outlined at EnergyStar.gov/PortfolioManager.
2. Within your PM page select the **Contacts** link.



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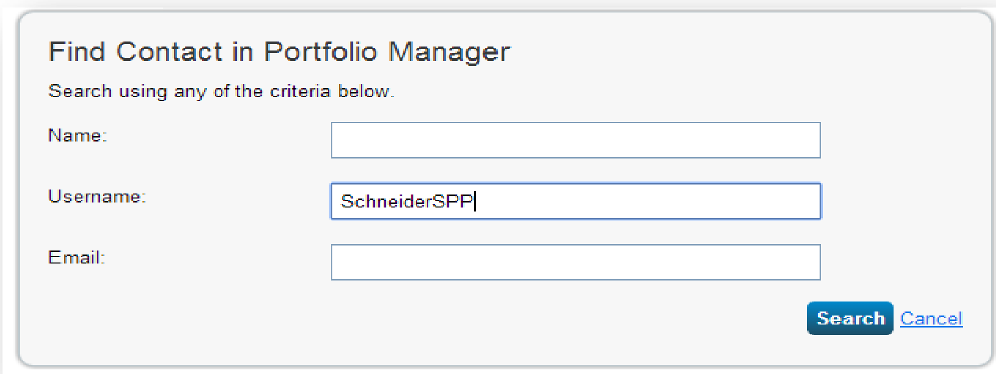
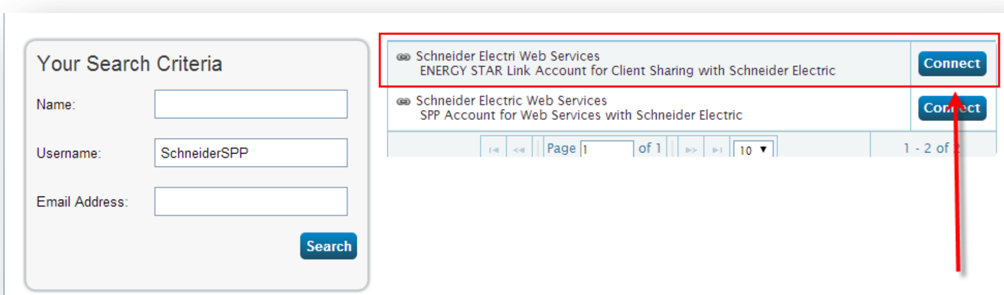
Connecting Portfolio Manager to Resource Advisor

3. Next, select **Add Contact**.

4. Search for username **SchneiderSPP** within the **Username** box.



5. Once PM locates the SchneiderSPP account, select the one that references ENERGY STAR and click **Connect**.



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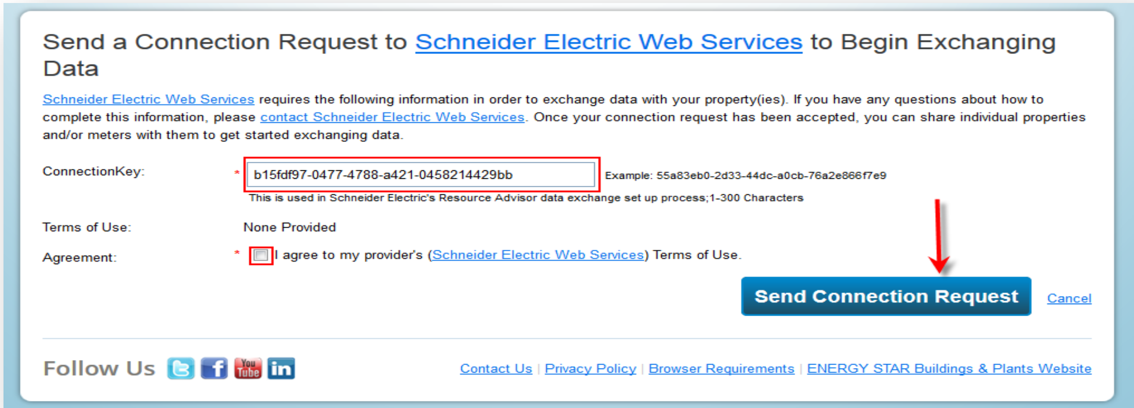
Connecting Portfolio Manager to Resource Advisor

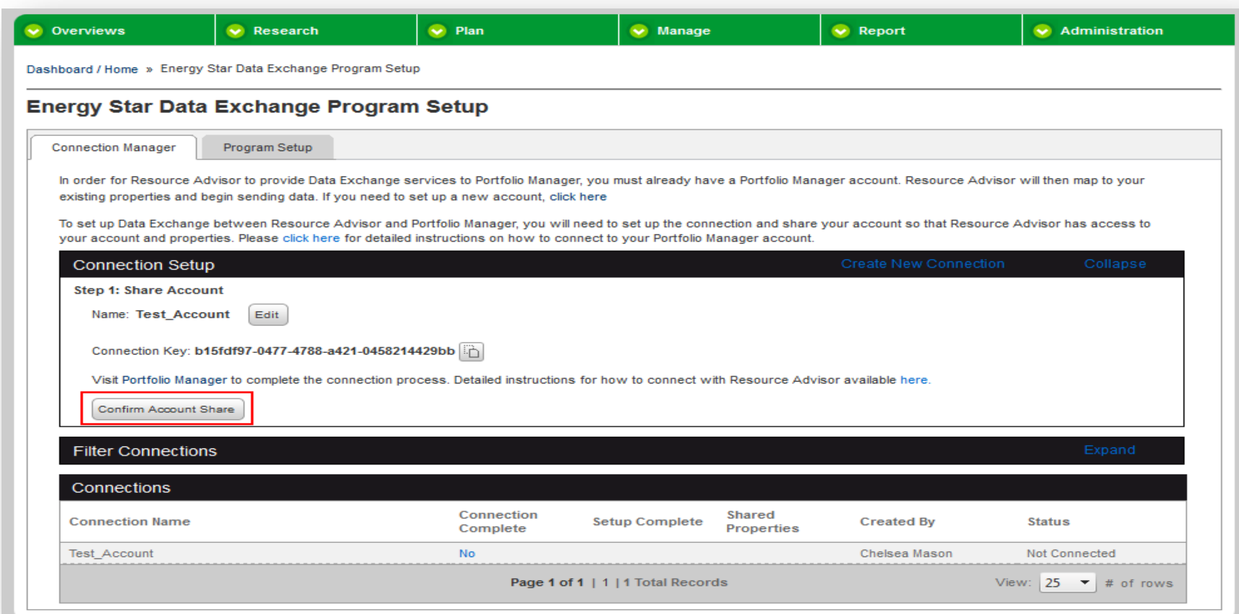
6. Paste **Connection Key** from Resource Advisor program setup page in Portfolio Manager's Connection Request page.
7. Check **"I agree to my provider's Terms of Use."**
8. **Send Connection Request**.



Step 3

Confirm share in Resource Advisor

1. Return to your Resource Advisor session and click **Confirm Account Share**.



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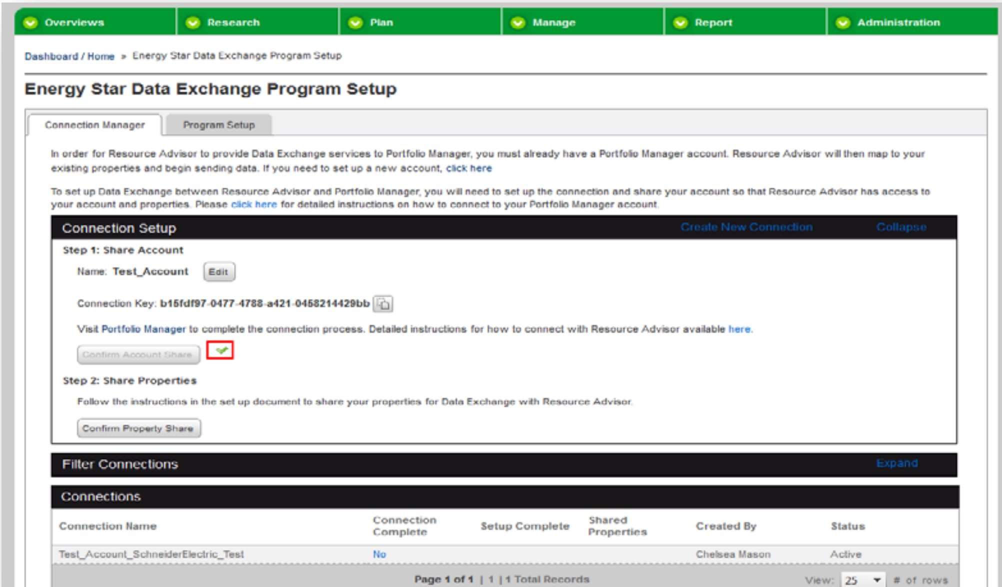
Connecting Portfolio Manager to Resource Advisor

2. A green check mark will appear to show the Portfolio Manager account has been accepted by Resource Advisor. This process may take up to five minutes.



Step 4

Sharing Properties in Portfolio Manager

Once the link between your Portfolio Manager account and your data in Resource Advisor has been made, it is then necessary to begin sharing properties within Portfolio Manager to the Resource Advisor Data Exchange connection.

1. In Portfolio Manager, share properties with Schneider Electric
   a. **Login** to your PM account.
   b. Go to the **Sharing** tab.
   c. Click **Share a Property**.

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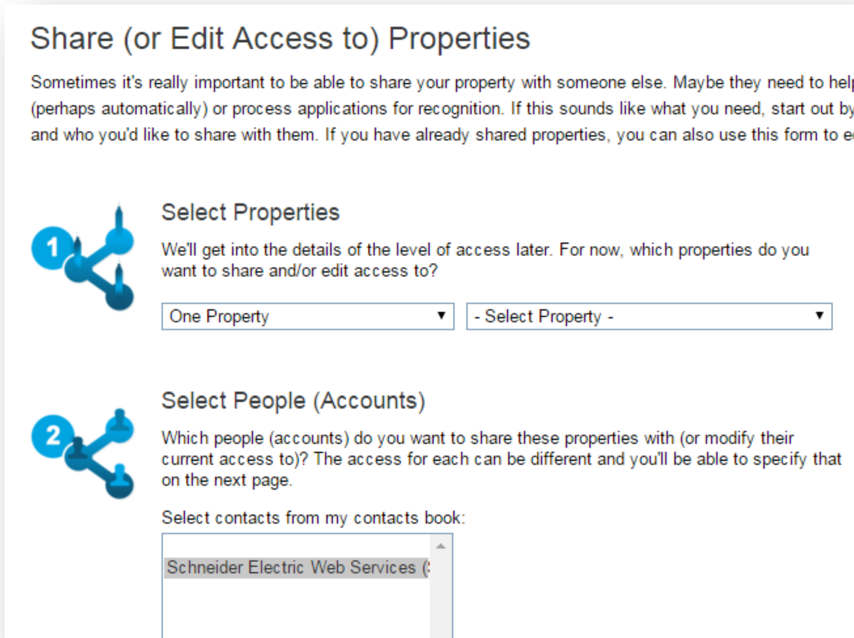
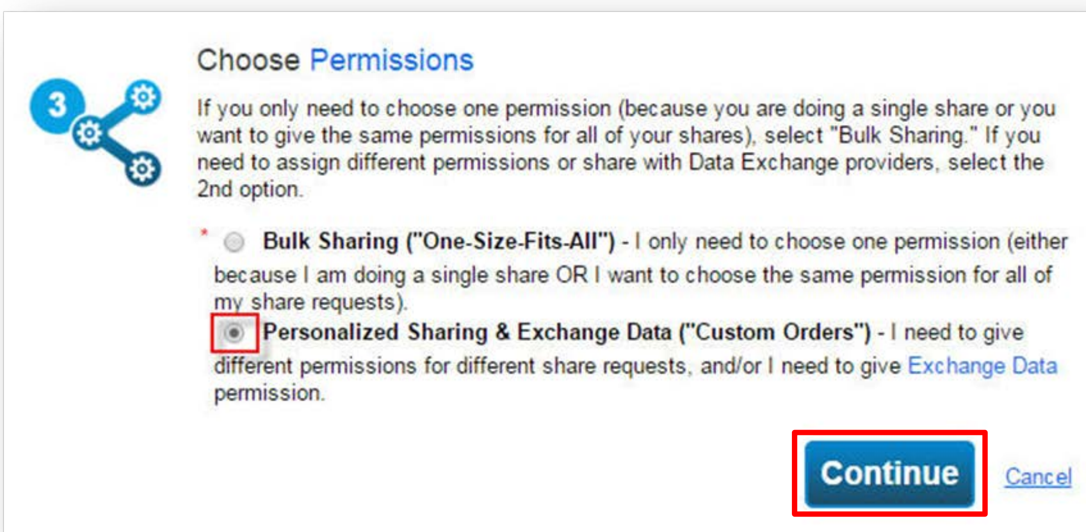
d. Select your **Property(ies) to share from the dropdown menu**.
e. Select to share with **Schneider Electric Web Services**.



f. Once the property is selected, choose the second permission option as indicated below: **"Personalized Sharing & Exchange Data ("Custom Orders")**
g. Click **Continue**.



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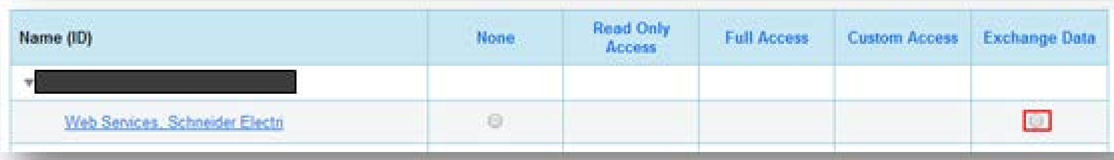
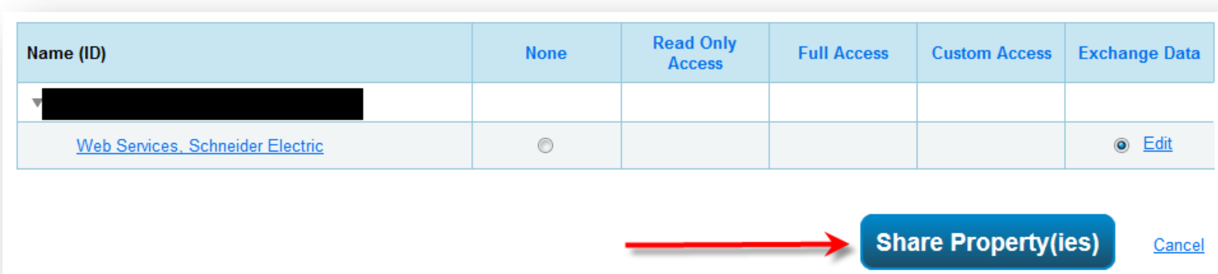
2. Click **Exchange Data** for each site.



3. In the menu that pops up (see below), select **Full Access** for:
    a. **Property Information**
    b. **All meters**
    c. **Goals, Improvements, & Checklists**
    d. **Recognition**
    e. You may have to use the vertical scroll bar to see all the options.
4. Choose **No** for allowing Share Forwards.
5. Click **Apply Selections & Authorize Exchange**. Please note this will need to be done **for every property**. At this time there is no bulk share option in Portfolio Manager.

6. Once the sections have been applied, click **Share Property(ies)**



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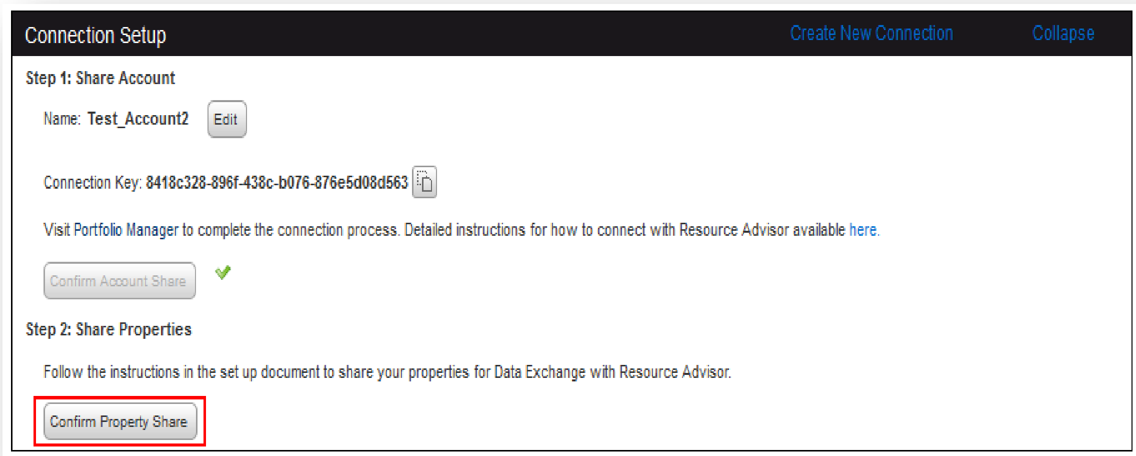
Connecting Portfolio Manager to Resource Advisor

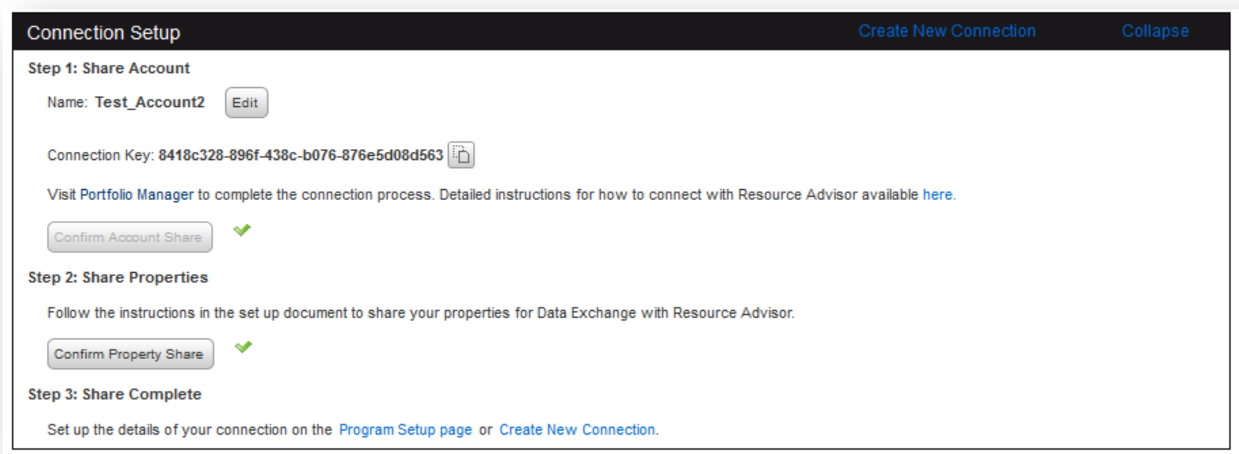
Step 5

Confirming Property Share in Resource Advisor

1. Returning to Resource Advisor, click **Confirm Property Share**.



2. A green check mark will appear to confirm the properties are being shared and you will be asked to **click ok** to confirm.
    a. Note: It will take a few minutes to accept the property shares from Portfolio Manager.



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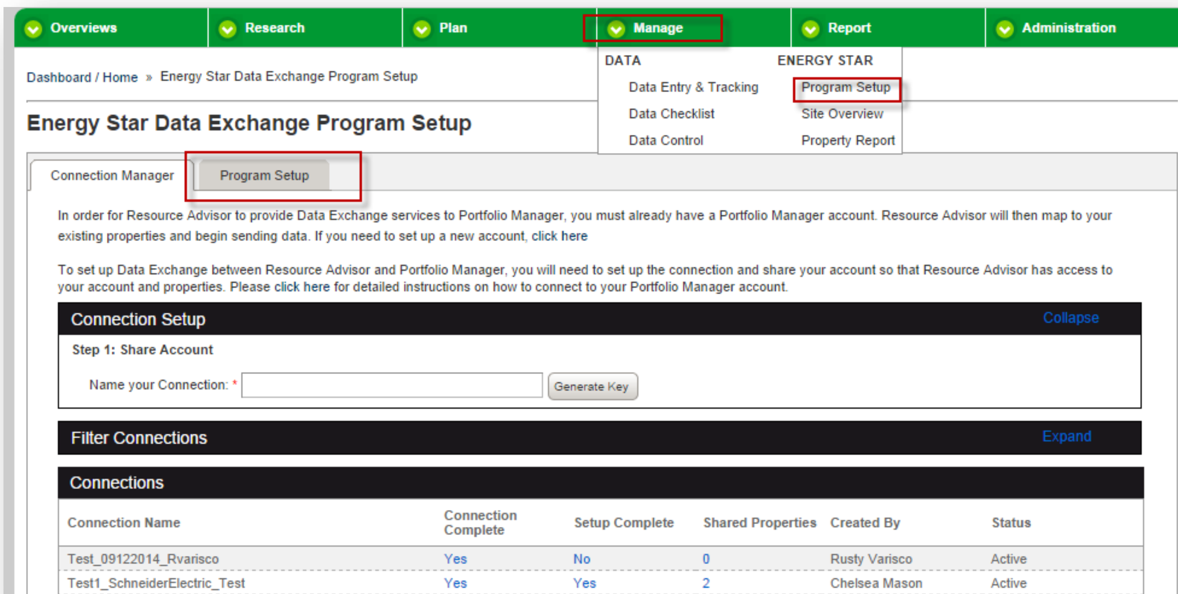
Connecting Portfolio Manager to Resource Advisor

Step 6

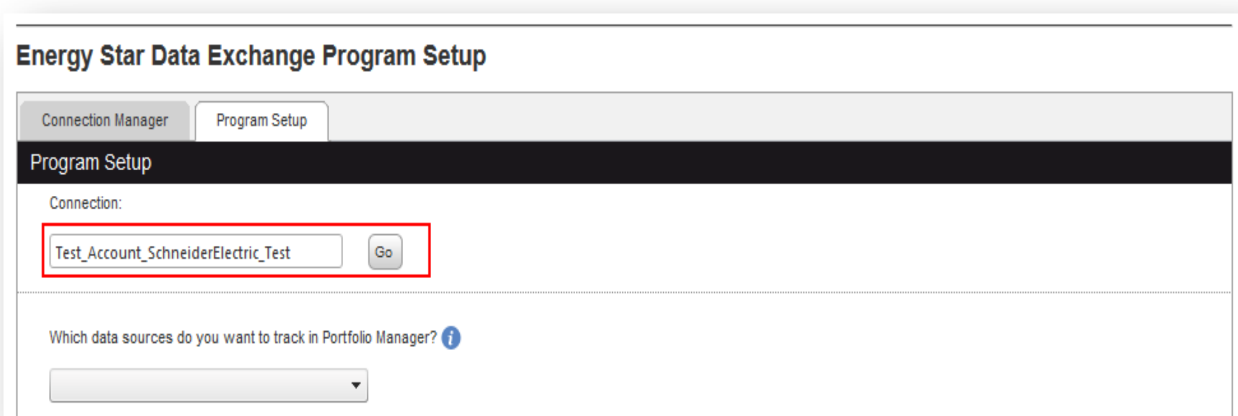
Program Setup in Resource Advisor

Once you've completed the previous steps, you now need to return to Resource Advisor and finish the setup process.

1. Navigate to **Manage tab > ENERGY STAR > Program Setup**.
2. Click on the **Program Setup** tab.



3. Filter to the connection you would like to set up. Type in the name of the connection and the filter will bring up all options with those words in the name. All connections must be set up individually.



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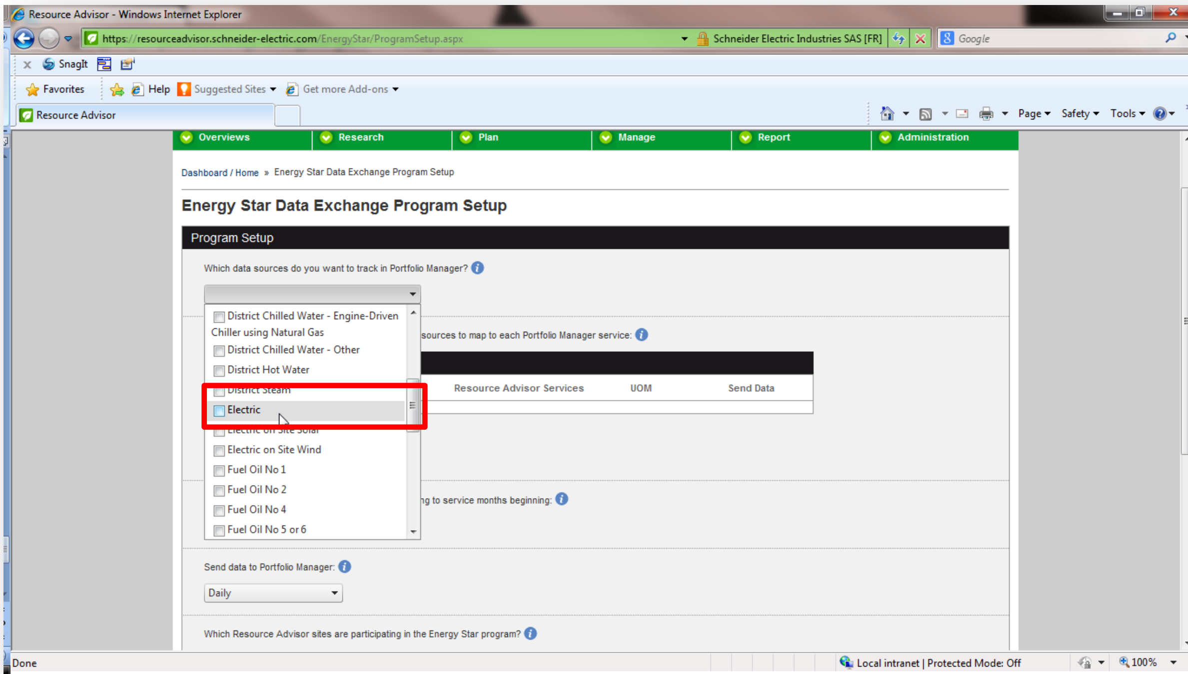
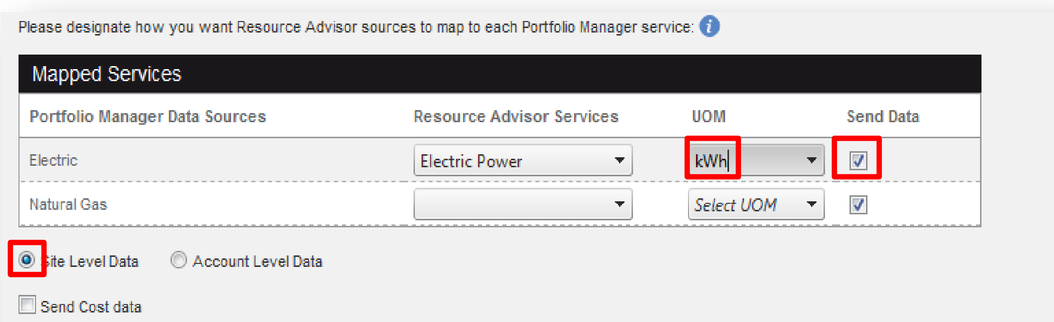
Connecting Portfolio Manager to Resource Advisor

4. On the **Program Setup** screen, you will select the applicable data sources to track in Portfolio Manager (choose **Electric** for this program).



5. Map Portfolio Manager Data Sources to Resource Advisor services by selecting which service corresponds to which Data Source from the dropdown.



6. Once a service is selected, you will be able to select the appropriate unit of measure (**kWh**) for this program.
7. To the right, check **Send Data** for sources you would like to transfer.
8. At the bottom please select the **Site Level Data** button.
   a. Note: Rocky Mountain Power provided data will be at the site/building level (aggregated for all meters, etc.) monthly.

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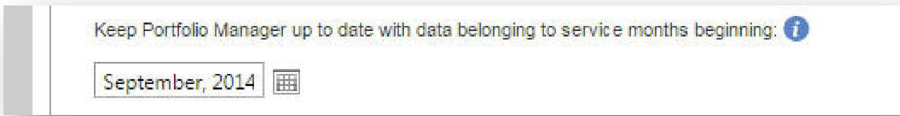
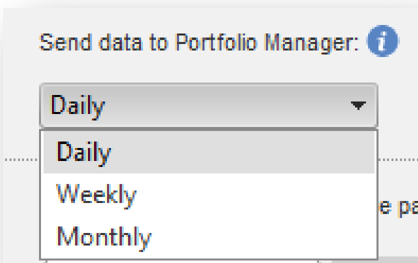
Connecting Portfolio Manager to Resource Advisor

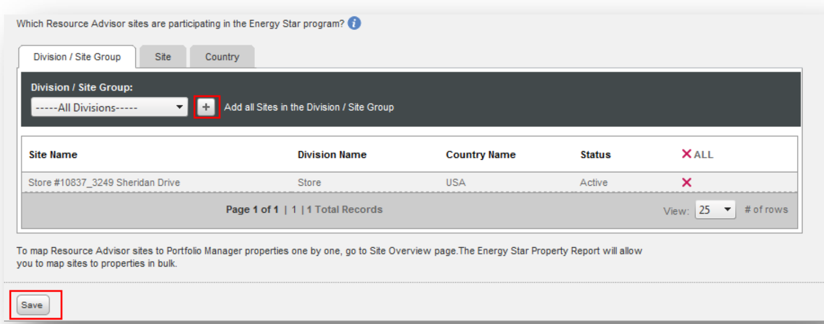
9. Next, select the **Program Setup Date** after which data will be tracked and synced from Portfolio Manager to Resource Advisor.
    a. Note: The Setup Date for this program will be 9/1/2014. If you have data in Portfolio Manager that you do not want overridden by historical data provided by Rocky Mountain Power, please choose today's date.



10. Currently Rocky Mountain Power is providing data to Resource Advisor on a monthly basis. However, please select **Daily** data exchange.
    a. Note: Scores and other attributes are brought back into RA on the same frequency, so if monthly is selected, PM metrics will not be seen in RA until the 1st of the following month. It is recommended to initially select daily, and then later switch to monthly or weekly once all portfolio details have synced.



11. The last step is to **select your site(s)** from the Resource Advisor site list that you would like to map to Portfolio Manager properties.
12. Then click **Save**.
    a. This process will take up to one hour. You can close your browser during this time.



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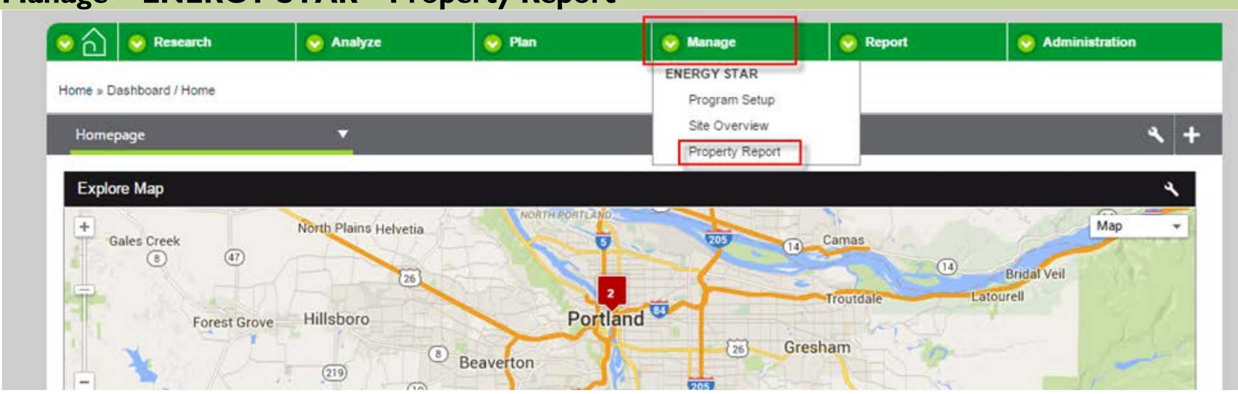
Connecting Portfolio Manager to Resource Advisor

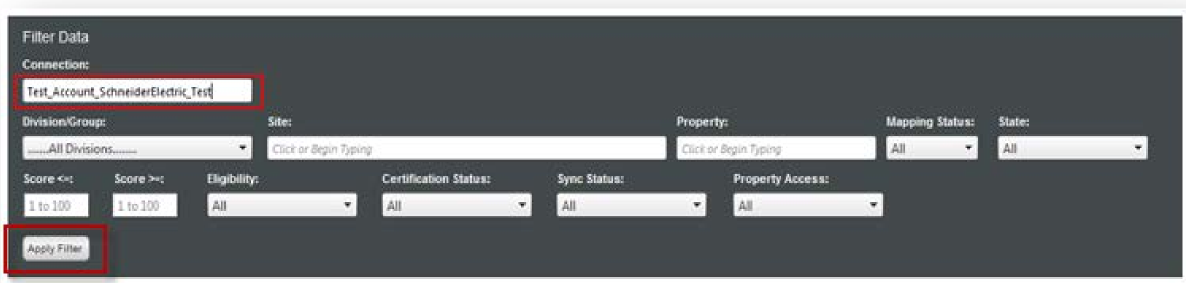
Property Report

The next step in the process is to map properties (PM) to sites (RA). This page will only allow you to map one property to one site at a time. If you need to map multiple properties to one site, use the Site Overview page. This page can be accessed at the bottom of the Program Setup page, or through the Manage tab.

Manage > ENERGY STAR – Property Report



1. Filter to the connection that houses the appropriate properties. Each connection must be mapped separately. Click **Apply Filter**.



2. On the next screen, click **Edit** in the bottom left-hand corner to map properties.

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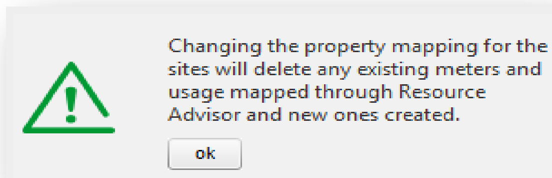
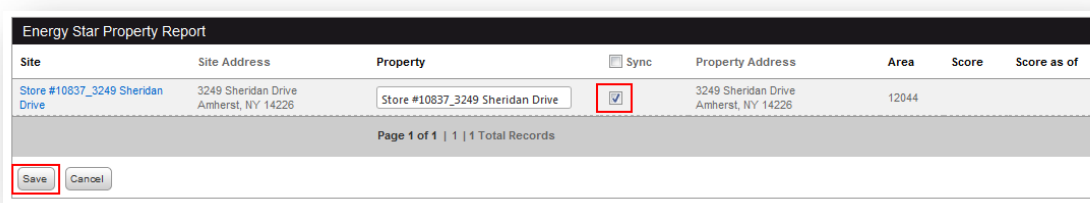
Connecting Portfolio Manager to Resource Advisor

3. The following warning will appear. Please note that once you have created RA meters in PM, any remapping will **delete** these previous meters and add new ones based on any new mapping. This allows for easy editing of new meters.
    a. If this is your first time setting up a connection with PM please click "ok" and proceed.
    b. If you have any questions about this warning screen, please contact [Portfolio Manager Support](#).

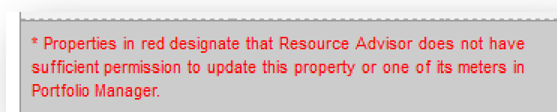


4. On the next screen, you can begin typing any portion of the property name in the box to call up the name of the Portfolio Manager property.

5. Next, check **Sync** to complete the mapping.
6. Lastly, click **Save** to complete this step.



Note: There is a note at the bottom of the page that helps troubleshoot potential problems. Properties will turn red if appropriate access levels are not granted. If you run into issues, please contact [Portfolio Manager Support](#).



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Connecting Portfolio Manager to Resource Advisor

Summary

Congratulations! You've successfully setup your Resource Advisor and Portfolio Manager connection and initiated the process of sharing data between the two platforms.

Sharing data is an overnight process. When you login to Resource Advisor tomorrow you should be able to view your current Portfolio Manager Score/EUI and other shared information. Details on how to quickly view that information can be found in the "Resource Advisor Overview" document provided by Rocky Mountain Power.

If you encounter any issues with either the program setup or navigating Resource Advisor, please contact Portfolio Manager Support by email at portfoliomanagersupport@ems.schneider-electric.com

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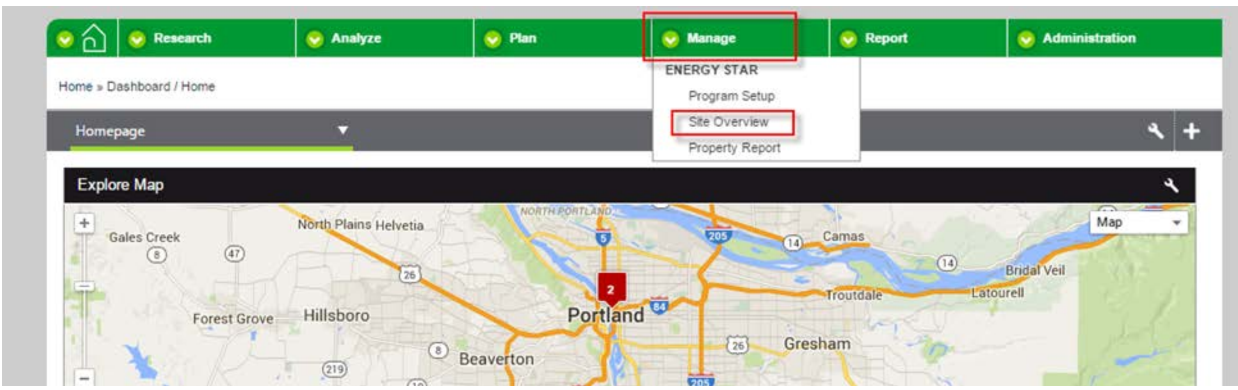
Navigation & Customization of your Portfolio Manager Data within Resource Advisor

Now that you've successfully made the Portfolio Manager and Resource Advisor connection(s), learn how to customize and navigate your Portfolio Manager data within Resource Advisor.

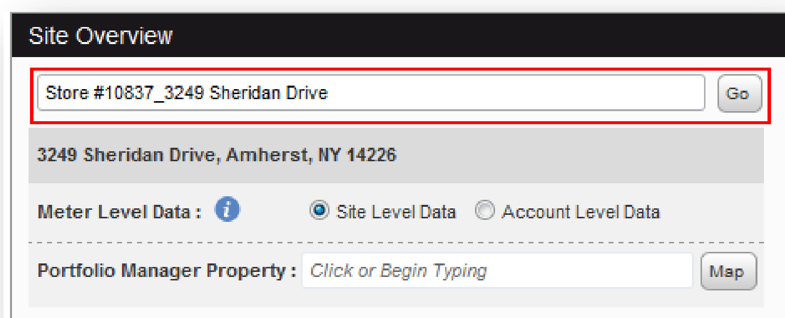
Manage > Site Overview

This page provides detailed information about your properties and sites based on Portfolio Manager and Resource Advisor shared data. This page will show property attributes from Portfolio Manager (e.g., Number of Workers, Number of Computers, Total Gross Floor Area, etc.). You can also do additional mapping that may be needed (e.g., if there are two PM properties for one RA site).



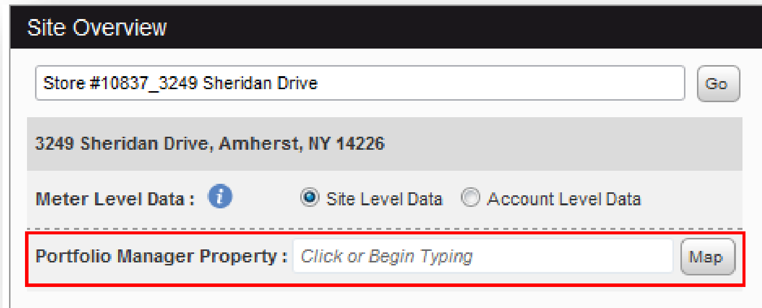
Mapping Sites

1. To view sites, type the site name into the box directly below Site Overview and click **Go**.

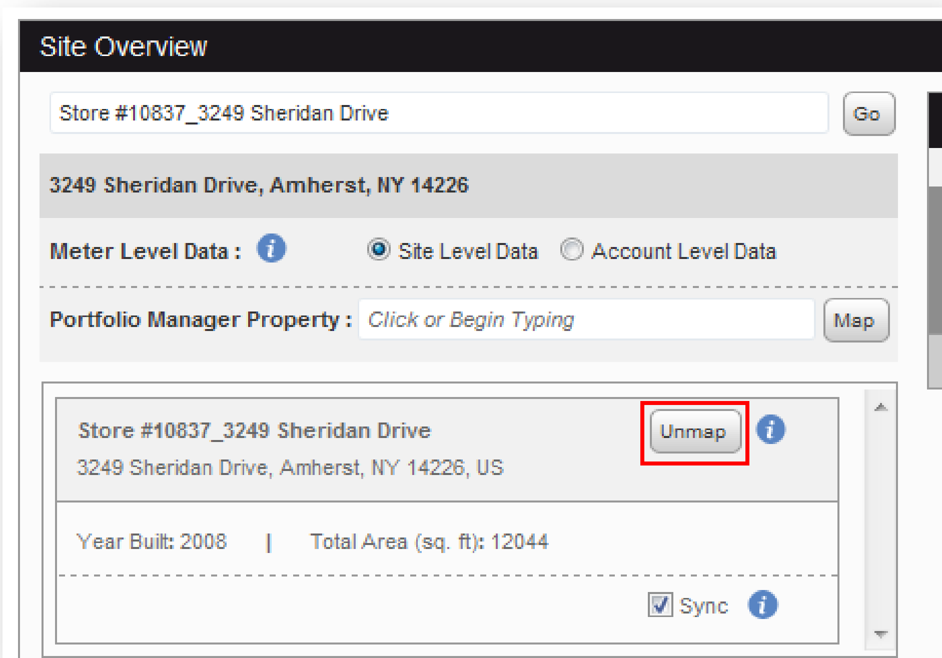


Connecting Portfolio Manager to Resource Advisor

2. To map a property, type the property name into the **Portfolio Manager Property** field and click **Map**.
   a. This will map an additional property to the Resource Advisor site selected in the exact same way as on the Property Report page. This will add Resource Advisor meters to PM and sync data.



3. To un-map a specific property, click **Un-map** next to the property name.



4. If a site is mapped to multiple connections, you must filter to the appropriate connection before you can edit the property.

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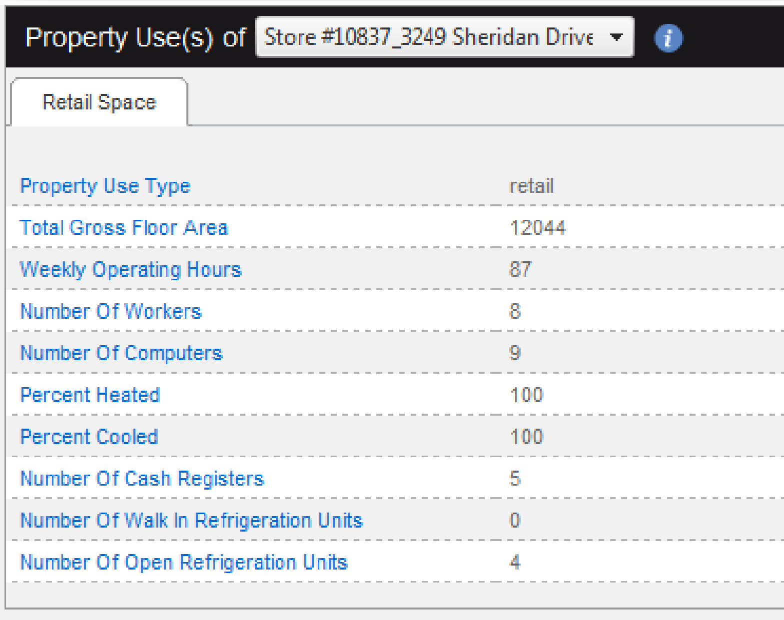
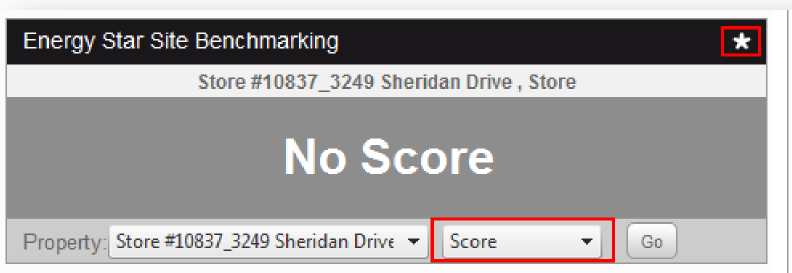
Connecting Portfolio Manager to Resource Advisor

Additional Information
This page gives you the most detail about the properties in one location. It includes all property attribute information for each Property Use as seen below.



This page will show the ENERGY STAR Score or EUI for the property in the ENERGY STAR Site Benchmarking Report. This can be placed on the Homepage using the **Star** icon.



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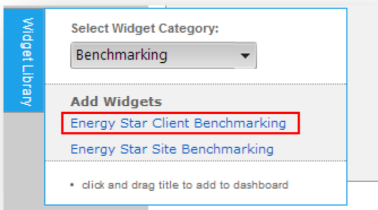
Client Level Widget

The Energy Star Client Benchmarking Widget allows you to see a broad overall view of ENERGY STAR Portfolio Manager.

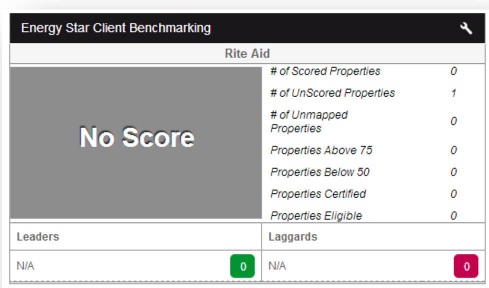
Add Widget

To add the client level widget, go to **Widget Library** choose **Benchmarking** and select **Energy Star Client Benchmarking** to drag and drop.



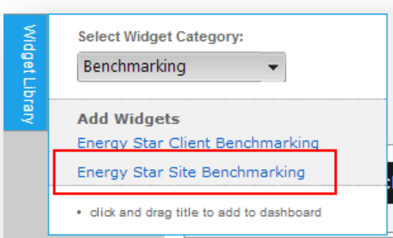
Information Shown on Widget

The widget will show information related to the most recent month of data. Therefore if you have a score for a month in progress, it will be shown as "UnScored" below. The Leaders and Laggards sections will show properties with the highest "green" scores (greater than 75) and lowest "red" scores (less than 50). This widget is helpful to gauge the general standing of your properties in ENERGY STAR Portfolio Manager.



Site Level Widget

The **Energy Star Site Benchmarking** widget provides a quick view of a specific site.



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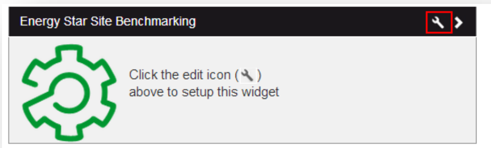
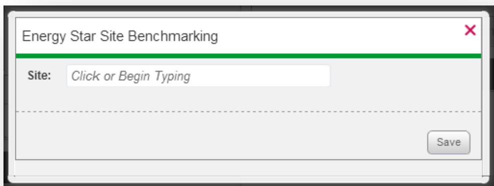
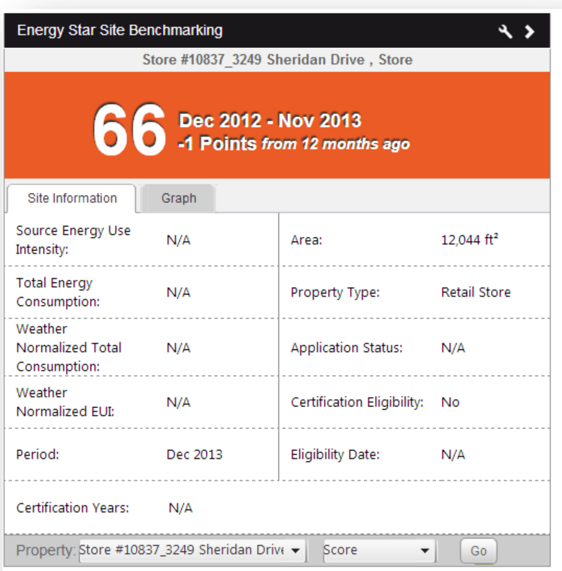
Information shown on Energy Star Site Benchmarking
To see site information, choose a specific site. Click the **Wrench** in the toolbar and select **Edit**.



Type in the site you want information for in the box that appears and click **Save**.



The widget will then populate with the appropriate site details on your dashboard.



This concludes the initial connection setup between Resource Advisor and Portfolio Manager. Direct Portfolio Manager Support can be reached at portfoliomanagersupport@ems.schneider-electric.com. To learn more about Portfolio Manager, visit EnergyStar.gov/PortfolioManager.

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