

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 most current version 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@se.com.

PORTFOLIO MANAGER AND RESOURCE ADVISOR – EXCHANGING DATA

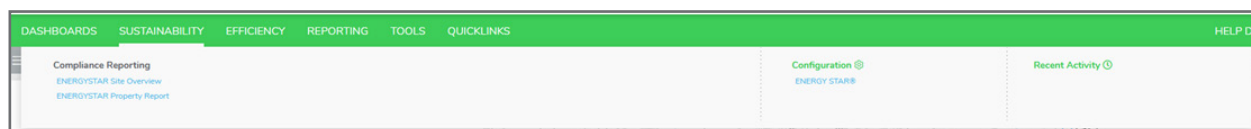
It will be necessary to establish a connection in your existing ENERGY STAR Portfolio Manager (PM) account to Schneider Electric's Web Services account. This process establishes the “electronic handshake” between the two platforms and creates a connection between your PM account and Schneider Electric's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

In the steps below, portions of the process will take place in Portfolio Manager and, others in Resource Advisor.

STEP 1

Start Connection Setup In Resource Advisor

1. Login to Resource Advisor and navigate to the Sustainability Tab. Click ENERGY STAR under Configuration.



- 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.

Dashboard / Home » Energy Star Data Exchange Program Setup

Energy Star Data Exchange Program Setup

Connection Manager Program Setup

In order for Resource Advisor to provide Data Exchange services to Portfolio Manager, you must already have a Portfolio Manager account. Resource Advisor will then map to your existing properties and begin sending data. If you need to set up a new account, [click here](#)

To set up Data Exchange between Resource Advisor and Portfolio Manager, you will need to set up the connection and share your account so that Resource Advisor has access to your account and properties. Please [click here](#) for detailed instructions on how to connect to your Portfolio Manager account.

Connection Setup Collapse

Step 1: Share Account

Name your Connection: * Generate Key

Filter Connections Expand

Connections

Connection Name	Connection Complete	Setup Complete	Shared Properties	Created By	Status
There are no record(s) to display.					

Page 1 of 1 | 1 | 0 Total Records View: 25 # of rows

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

Dashboard / Home » Energy Star Data Exchange Program Setup

Energy Star Data Exchange Program Setup

Connection Manager Program Setup

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Connection Setup Collapse

Step 1: Share Account

Name your Connection: * Generate Key

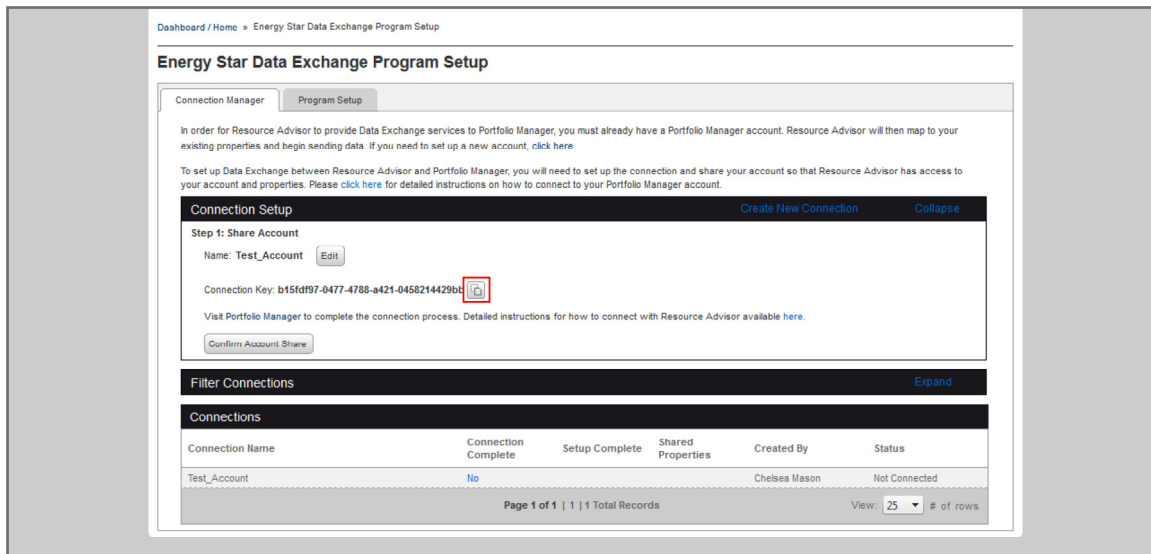
Filter Connections Expand

Connections

Connection Name	Connection Complete	Setup Complete	Shared Properties	Created By	Status
There are no record(s) to display.					

Page 1 of 1 | 1 | 0 Total Records View: 25 # of rows

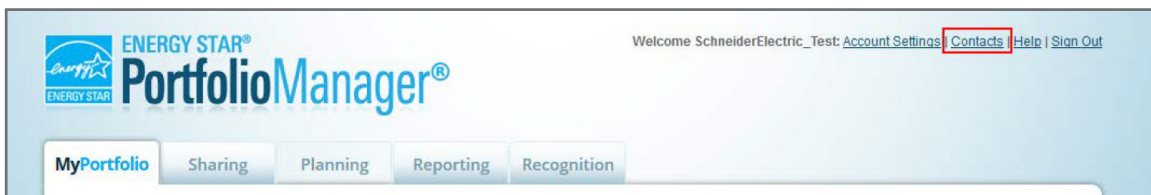
- When the Connection Key appears, copy it by clicking the copy icon. Follow the instructions to copy the entire Connection Key. **Leave this page/connection open.**



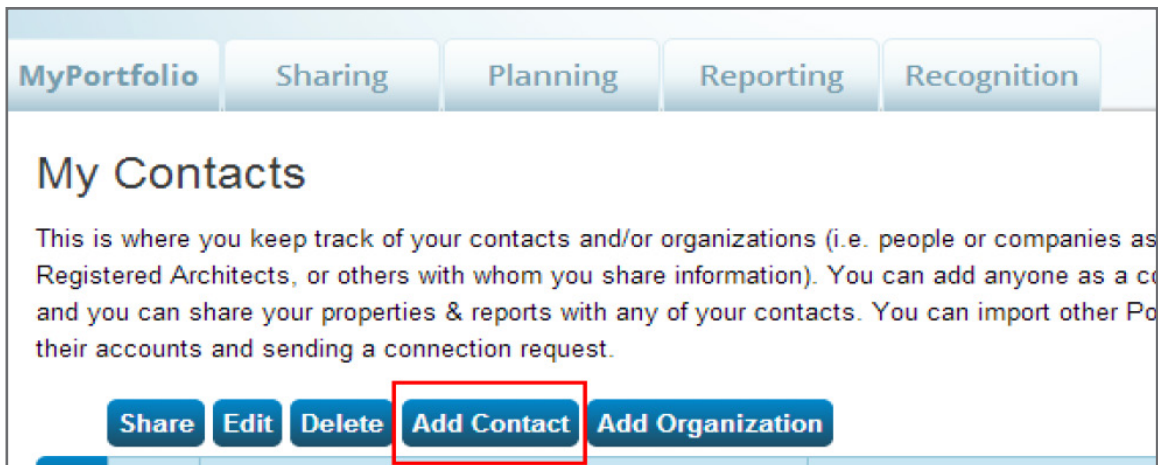
STEP 2

Add Schneider Electric as a Contact to your Portfolio Manager Account

- Log in to your Portfolio Manager account.
 - Note:** If you do not have an existing PM account please follow the sign-up instructions outlined at [EnergyStar.gov/PortfolioManager](https://www.energystar.gov/PortfolioManager).
- Within your PM page select the **Contacts** link.



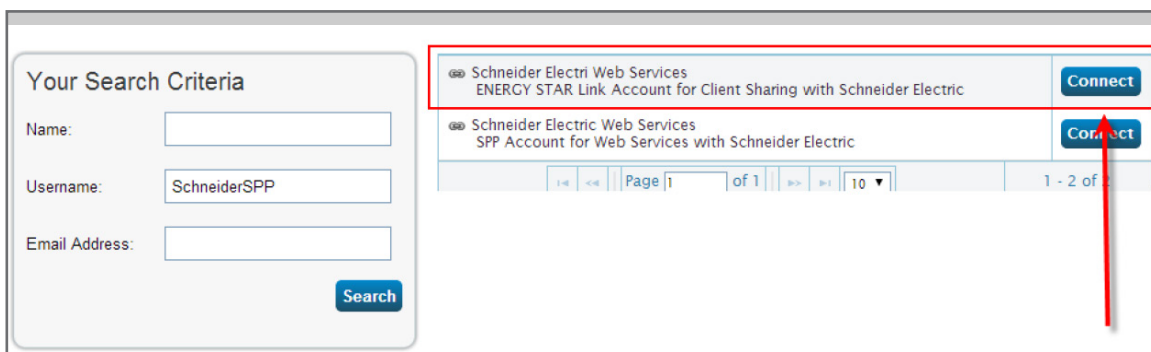
3. Next, select **Add Contact**.



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

The screenshot shows the 'Find Contact in Portfolio Manager' search form. It includes the instruction 'Search using any of the criteria below.' and three input fields: 'Name:', 'Username:', and 'Email:'. The 'Username:' field contains the text 'SchneiderSPP'. At the bottom right, there are 'Search' and 'Cancel' buttons.

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



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

Send a Connection Request to [Schneider Electric Web Services](#) to Begin Exchanging Data

[Schneider Electric Web Services](#) requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please [contact Schneider Electric Web Services](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

ConnectionKey: Example: 55a83eb0-2d33-44dc-a0cb-76a2e866f7e9
This is used in Schneider Electric's Resource Advisor data exchange set up process; 1-300 Characters

Terms of Use: ☐ None Provided

Agreement: ☒ I agree to my provider's ([Schneider Electric Web Services](#)) Terms of Use.

[Send Connection Request](#) [Cancel](#)

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STEP 3

Confirm share in Resource Advisor

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

Dashboard / Home » Energy Star Data Exchange Program Setup

Energy Star Data Exchange Program Setup

Connection Manager Program Setup

In order for Resource Advisor to provide Data Exchange services to Portfolio Manager, you must already have a Portfolio Manager account. Resource Advisor will then map to your existing properties and begin sending data. If you need to set up a new account, [click here](#)

To set up Data Exchange between Resource Advisor and Portfolio Manager, you will need to set up the connection and share your account so that Resource Advisor has access to your account and properties. Please [click here](#) for detailed instructions on how to connect to your Portfolio Manager account.

Connection Setup

[Create New Connection](#) [Collapse](#)

Step 1: Share Account

Name: Test_Account [Edit](#)

Connection Key: b15fdf97-0477-4788-a421-0458214429bb [Copy](#)

Visit Portfolio Manager to complete the connection process. Detailed instructions for how to connect with Resource Advisor available [here](#).

[Confirm Account Share](#)

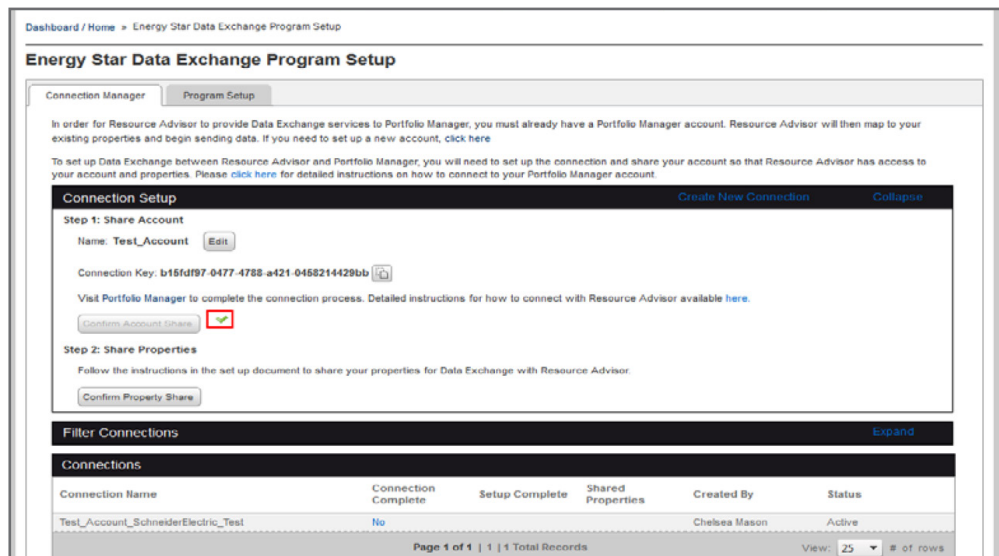
Filter Connections

[Expand](#)

Connections	Connection Complete	Setup Complete	Shared Properties	Created By	Status
Test_Account	No			Chelsea Mason	Not Connected

Page 1 of 1 | 1 | 1 Total Records View: 25 # of rows

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**.



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

Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the properties you want to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit access.




Select Properties

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

One Property ▾

- Select Property - ▾




Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

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**.



Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

☐ Bulk Sharing ("One-Size-Fits-All") - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).

☒ **Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

Continue

[Cancel](#)

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

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
<div>▼ [Redacted]</div> Web Services: Schneider Electric	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

3. In the menu that pops up (see below), select Full Access for:

- Property Information
- All meters
- Goals, Improvements, & Checklists
- Recognition
- 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.

Select Exchange Data Access Permissions to [Redacted] for [Schneider Electric Web Services](#).

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ All Meter Information			
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Recognition	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>


Additional Options:

Item	Yes	No
Share Forward Allow Schneider Electric Web Services to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

Apply Selections & Authorize Exchange [Cancel](#)

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

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
<div>▼ [REDACTED]</div> Web Services_Schneider Electric	<input type="radio"/>				<input checked="" type="radio"/> Edit



**Share Property(ies)** [Cancel](#)

STEP 5

Confirming Property Share in Resource Advisor

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

Connection Setup [Create New Connection](#) [Collapse](#)

Step 1: Share Account
Name: **Test_Account2** [Edit](#)
Connection Key: **8418c328-896f-438c-b076-876e5d08d563** 
Visit [Portfolio Manager](#) to complete the connection process. Detailed instructions for how to connect with Resource Advisor available [here](#).
[Confirm Account Share](#) 



Step 2: Share Properties
Follow the instructions in the set up document to share your properties for Data Exchange with Resource Advisor.

[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.

Connection Setup [Create New Connection](#)

Step 1: Share Account
Name: **Test_Account2** [Edit](#)
Connection Key: **8418c328-896f-438c-b076-876e5d08d563** 
Visit [Portfolio Manager](#) to complete the connection process. Detailed instructions for how to connect with Resource Advisor available [here](#).
[Confirm Account Share](#) 

Step 2: Share Properties
Follow the instructions in the set up document to share your properties for Data Exchange with Resource Advisor.

[Confirm Property Share](#) 

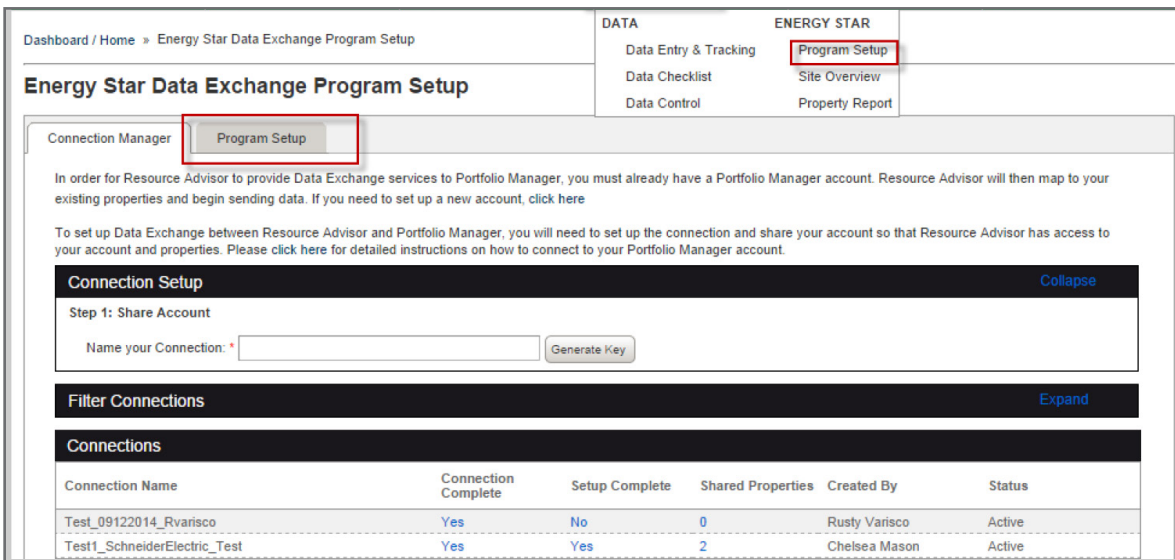
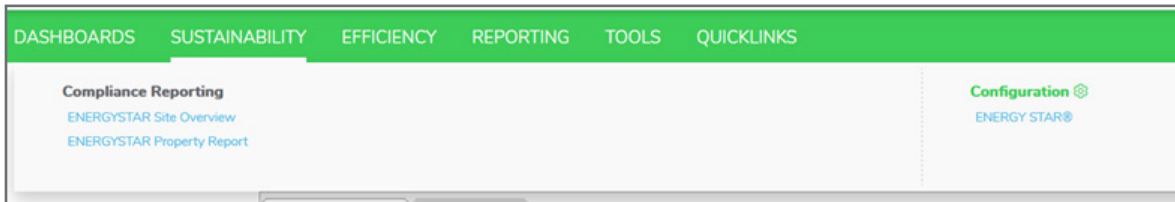
Step 3: Share Complete
Set up the details of your connection on the [Program Setup page](#) or [Create New Connection](#).

STEP 6

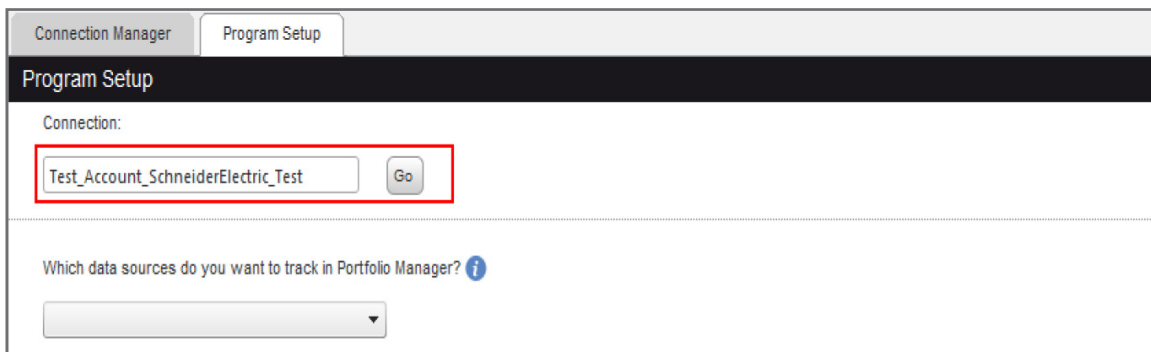
Program Setup in Resource Advisor

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

1. Navigate to **Sustainability > Configuration > ENERGY STAR**.
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.



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

Dashboard / Home » Energy Star Data Exchange Program Setup

Energy Star Data Exchange Program Setup

Program Setup

Which data sources do you want to track in Portfolio Manager? ⓘ

- ☐ District Chilled Water - Engine-Driven Chiller using Natural Gas
- ☐ District Chilled Water - Other
- ☐ District Hot Water
- ☒ **Electric**
- ☐ Electric on Site Solar
- ☐ Electric on Site Wind
- ☐ Fuel Oil No 1
- ☐ Fuel Oil No 2
- ☐ Fuel Oil No 4
- ☐ Fuel Oil No 5 or 6

sources to map to each Portfolio Manager service: ⓘ

Resource Advisor Services	UOM	Send Data
		<input checked="" type="checkbox"/>

ing to service months beginning: ⓘ

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

Please designate how you want Resource Advisor sources to map to each Portfolio Manager service: ⓘ

Mapped Services

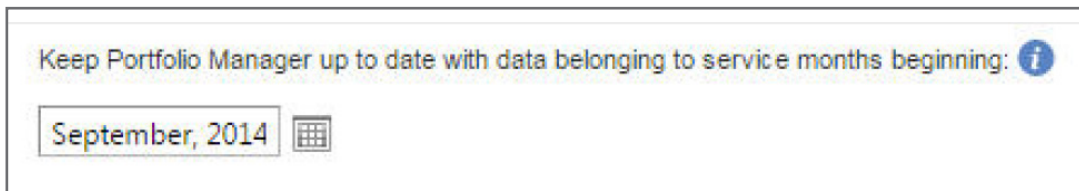
Portfolio Manager Data Sources	Resource Advisor Services	UOM	Send Data
Electric	Electric Power	kWh	<input checked="" type="checkbox"/>
Natural Gas		Select UOM	<input checked="" type="checkbox"/>

☒ **Site Level Data** ☐ Account Level Data

☐ Send Cost data

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.

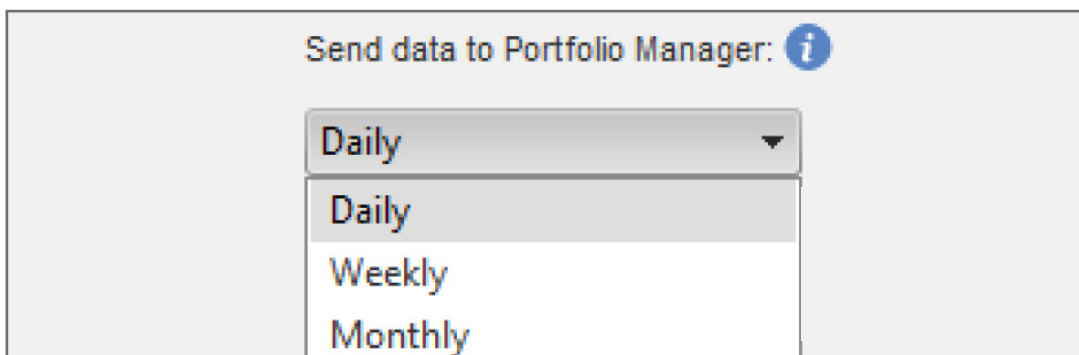
9. Next, select the Program Setup Date after which data will be tracked and synced from Portfolio Manager to Resource Advisor.
- a. **Note:** The Setup Date for this program will be 9/1/2014. If you have data in Portfolio Manager that you do not want overridden by historical data provided by Rocky Mountain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




Keep Portfolio Manager up to date with data belonging to service months beginning: i

September, 2014 

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.



Send data to Portfolio Manager: i

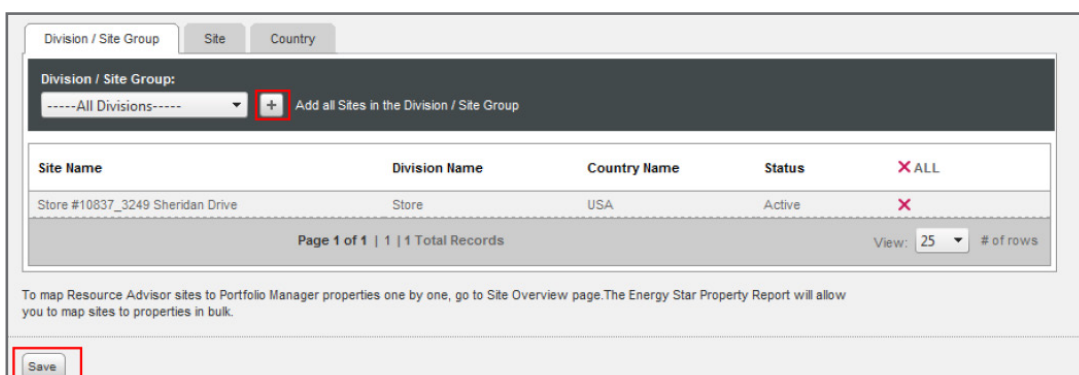
Daily 

Daily

Weekly

Monthly

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.



Division / Site Group Site Country

Division / Site Group: -----All Divisions----- + Add all Sites in the Division / Site Group

Site Name	Division Name	Country Name	Status	<input checked="" type="checkbox"/> ALL
Store #10837_3249 Sheridan Drive	Store	USA	Active	<input checked="" type="checkbox"/>

Page 1 of 1 | 1 | 1 Total Records View: 25 # of rows

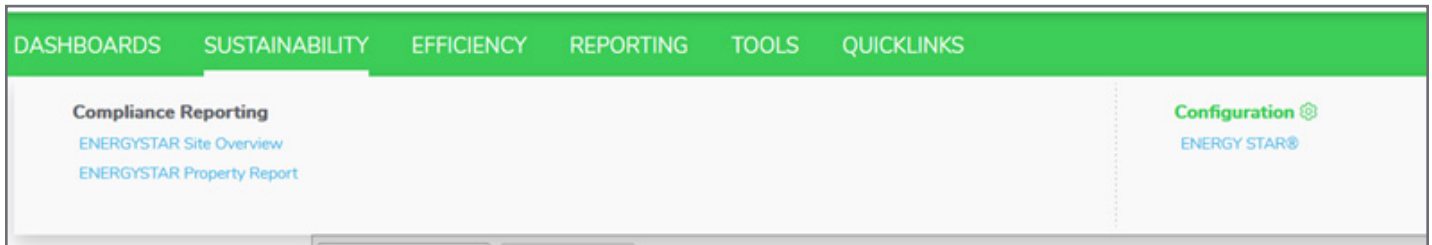
To map Resource Advisor sites to Portfolio Manager properties one by one, go to Site Overview page. The Energy Star Property Report will allow you to map sites to properties in bulk.

Save

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.

Sustainability Tab > Compliance Reporting > ENERGY STAR Property Report



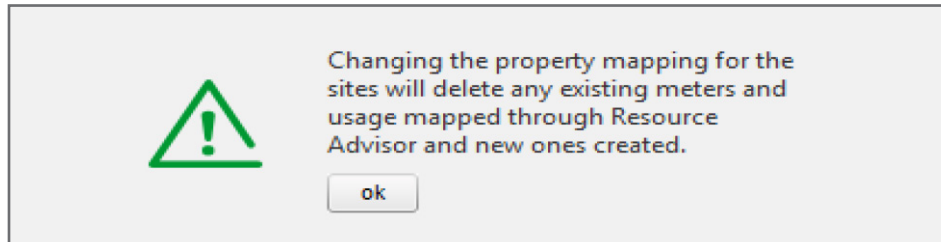
1. Filter to the connection that houses the appropriate properties. Each connection must be mapped separately. Click **Apply Filter**.

A screenshot of the 'Filter Data' form. It contains several input fields and dropdown menus. The 'Connection' field is highlighted with a red box and contains the text 'Test_Account_SchneiderElectric_Test'. Below it, there are dropdowns for 'Division/Group' (set to 'All Divisions'), 'Site' (with a 'Click or Begin Typing' prompt), 'Property' (with a 'Click or Begin Typing' prompt), 'Mapping Status' (set to 'All'), and 'State' (set to 'All'). There are also input fields for 'Score <=' and 'Score >=' (both set to '1 to 100'), and dropdowns for 'Eligibility' (set to 'All'), 'Certification Status' (set to 'All'), 'Sync Status' (set to 'All'), and 'Property Access' (set to 'All'). At the bottom left, the 'Apply Filter' button is highlighted with a red box.

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

A screenshot of the 'Energy Star Property Report' table. The table has columns for Site, Site Address, Property, Sync, Property Address, Area, Score, Score as of, EUI, Eligible, and Certified. The first row of data shows a site with the address '3249 Sheridan Drive' and a score of '10637'. At the bottom left of the table, the 'Edit' button is highlighted with a red box. The table also includes a 'Download PDF | Excel' link at the top right and a 'Page 1 of 1 | 1 Total Records' footer.

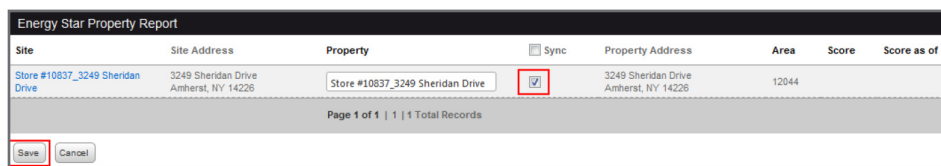
3. The following warning will appear. Please note that once you have created RA meters in PM, any remapping will **delete** these previous meters and add new ones based on any new mapping. This allows for easy editing of new meters.
 - a. If this is your first time setting up a connection with PM please click “ok” and proceed.
 - b. If you have any questions about this warning screen, please contact PortfolioManagerSupport@se.com.



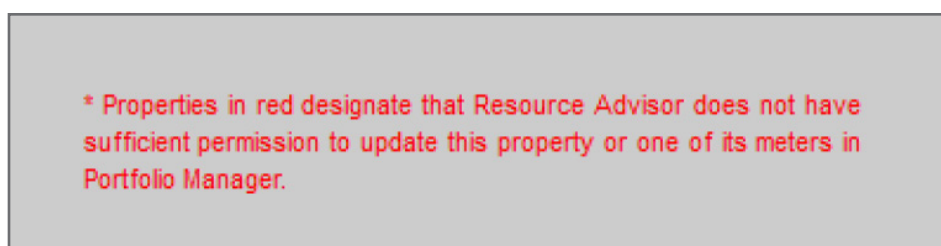
4. On the next screen, you can begin typing any portion of the property name in the box to call up the name of the Portfolio Manager property.



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 PortfolioManagerSupport@se.com.



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.

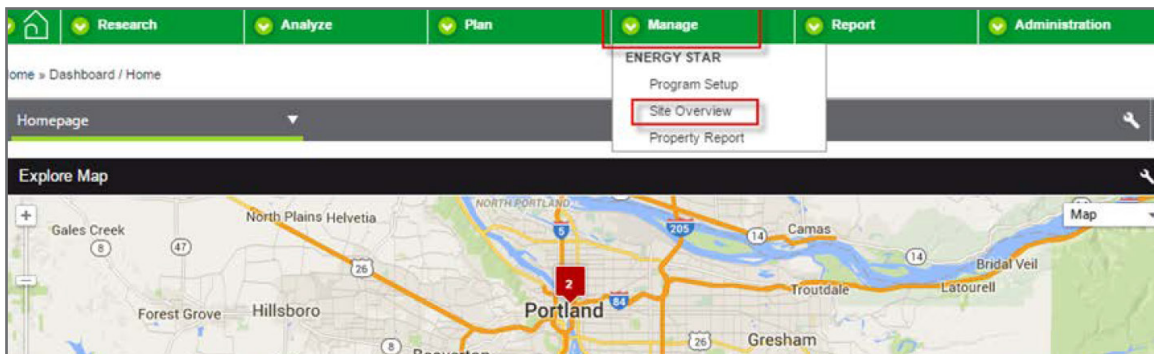
If you encounter any issues with either the program setup or navigating Resource Advisor, please contact Portfolio Manager Support by email at PortfolioManagerSupport@se.com.

NAVIGATION AND 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.

Sustainability > ENERGY STAR 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.

A screenshot of the 'Site Overview' section of the Resource Advisor interface. It features a search input field with the text 'Store #10837_3249 Sheridan Drive' entered. To the right of the input field is a 'Go' button. Below the input field, the address '3249 Sheridan Drive, Amherst, NY 14226' is displayed. A red box highlights the input field and the Go button.

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.

Select Exchange Data Access Permissions to [redacted] for [Schneider Electric Web Services](#).

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ All Meter Information			
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Recognition	<input type="radio"/>		<input checked="" type="radio"/>

Additional Options:

Item	Yes	No
Share Forward Allow Schneider Electric Web Services to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

Apply Selections & Authorize Exchange [Cancel](#)

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

Site Overview

Store #10837_3249 Sheridan Drive [Go](#)

3249 Sheridan Drive, Amherst, NY 14226

Meter Level Data : [i](#) ☒ Site Level Data ☐ Account Level Data

Portfolio Manager Property : [Map](#)

Store #10837_3249 Sheridan Drive

3249 Sheridan Drive, Amherst, NY 14226, US

[Unmap](#) [i](#)

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

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.

Property Use(s) of Store #10837_3249 Sheridan Drive 	
Retail Space	
Property Use Type	retail
Total Gross Floor Area	12044
Weekly Operating Hours	87
Number Of Workers	8
Number Of Computers	9
Percent Heated	100
Percent Cooled	100
Number Of Cash Registers	5
Number Of Walk In Refrigeration Units	0
Number Of Open Refrigeration Units	4

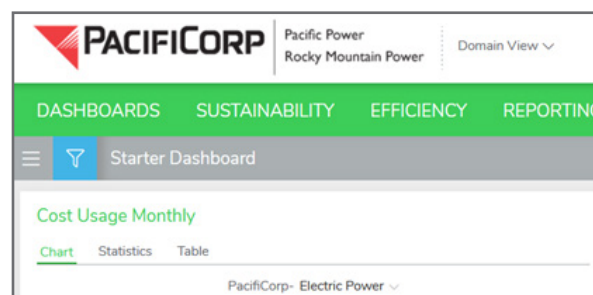
This page will show the ENERGY STAR Score or EUI for the property in the ENERGY STAR Site Benchmarking Report.

Client Level Widget

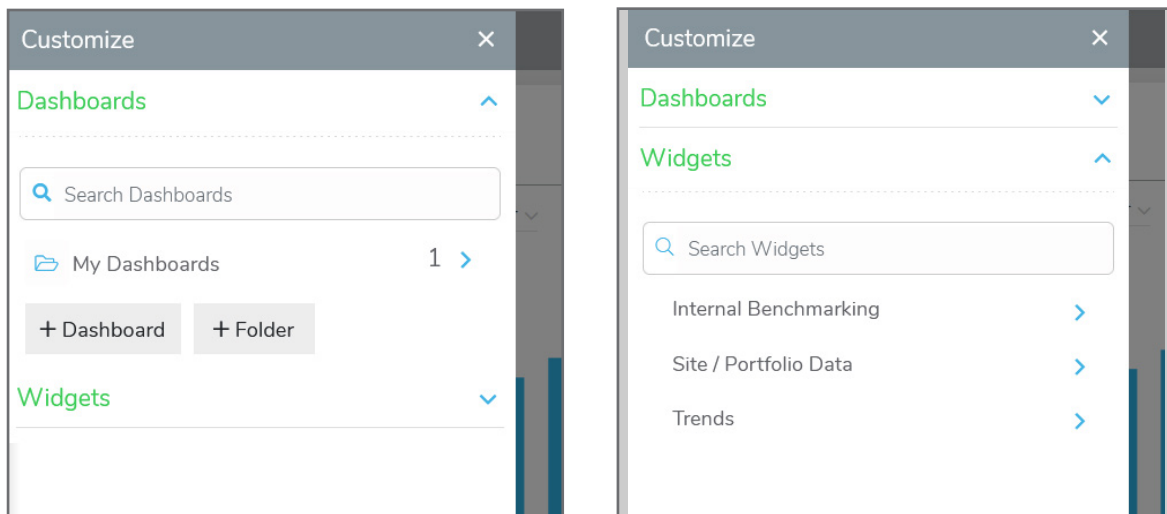
The Energy Star Client Benchmarking Widget allows you to see a broad overall view of ENERGY STAR Portfolio Manager.

Add Widget

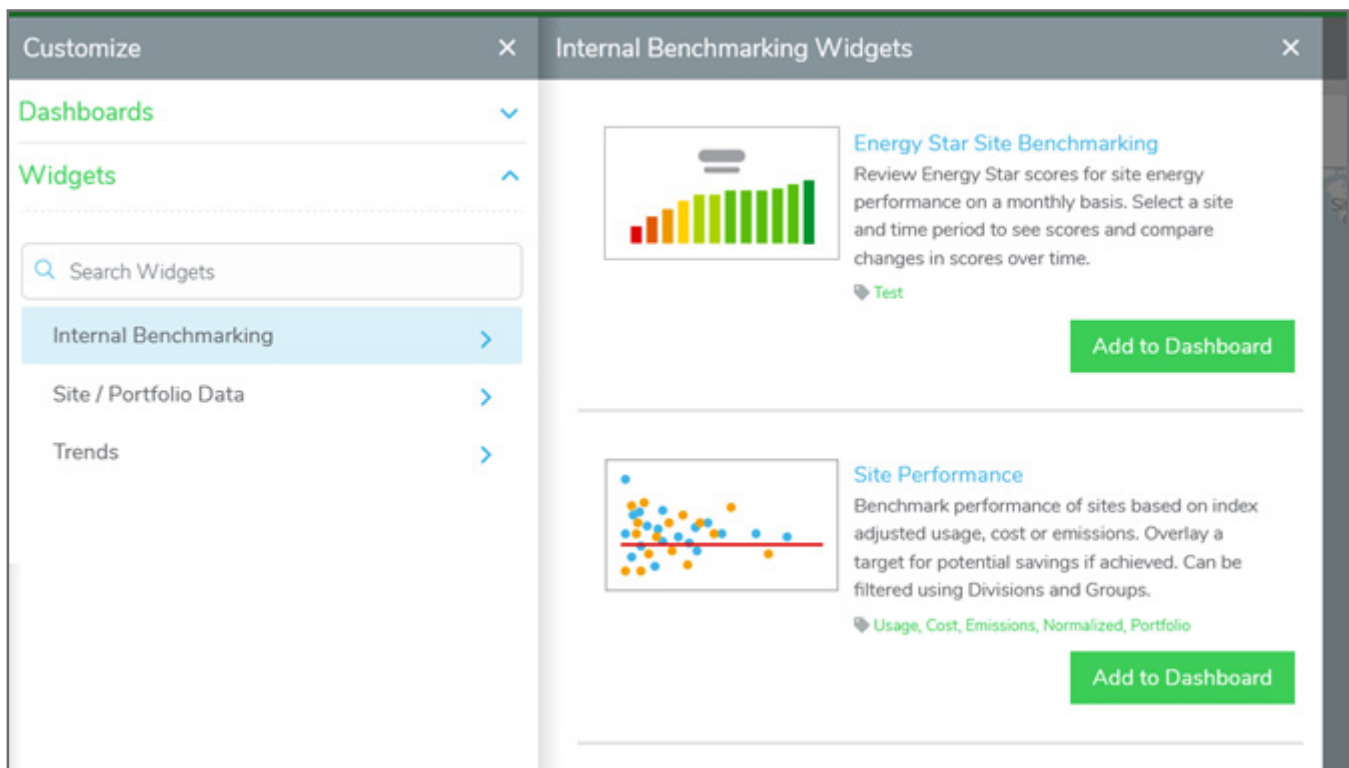
To add a widget, navigate to the Dashboard and click the top left “Hamburger” icon to open the menu..



Then click the “Widget” dropdown from the Flyout menu. Then select the Internal Benchmarking group



And then click Add to Dashboard

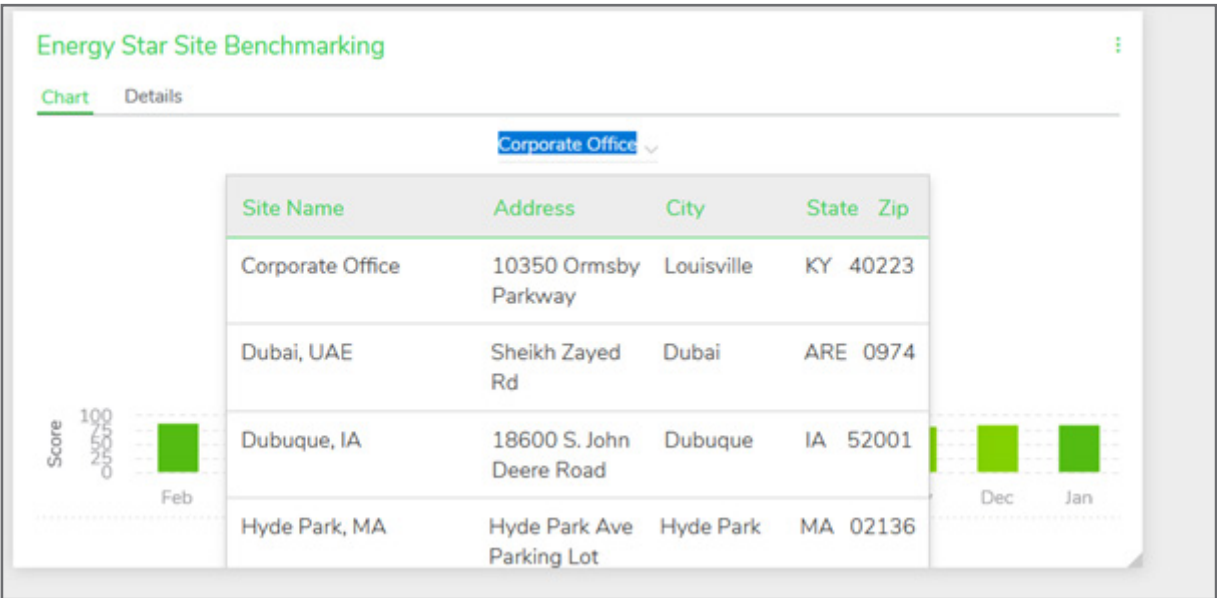


Information Shown on Widget

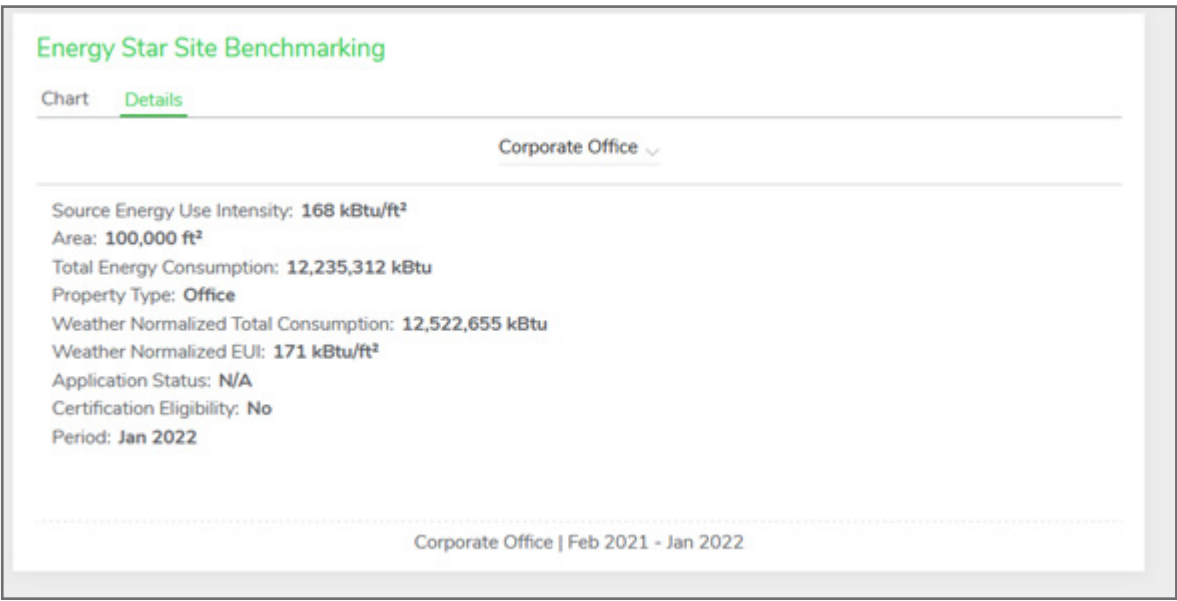
The widget will show information related to the most recent month of data. Therefore if you have a score for a month in progress, it will be shown as “UnScored” below. The Leaders and Laggards sections will show properties with the highest “green” scores (greater than 75) and lowest “red” scores (less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



Users can choose the site via the dropdown above the Score, which will show available sites



Details tab will show the site information from the Energy Star Portfolio Manager



Users can repeat this process for all sites they'd like to have on their dashboard.

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