

## How to Share Properties with Other Portfolio Manager® Users

EPA’s ENERGY STAR Portfolio Manager tool helps you measure and track the energy use, water use, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the tool to identify under-performing buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance.

Sharing your properties is an important task. There are many reasons you may want to share access to your property, such as providing information to colleagues or other partners who are helping you improve the performance of your portfolio. Follow these steps to share your properties.

### **Process for Sharing**

1. Connect with Others
2. Share Properties
3. Manage Your Shared Properties

## **1** Connect with Others

In order to share a property with others, you must first be “connected” to them in Portfolio Manager. To send a connection request (or confirm that you’re already connected) go to the **Contacts** page:

1. Click **Contacts** in the upper right-hand corner of the screen. The directory shows your current list of contacts, including those with whom you are currently “connected.”
2. Click **Add Contact**.
3. Find a Portfolio Manager user by searching for their name, Portfolio Manager username, or email address. **NOTE:** You can only “connect” with users who are searchable in Portfolio Manager. On the **Account Settings** page, you can change your “**Searchability**” setting.
4. When you find the person you want to connect with on the **Search Results** page, click “**Connect**” to send them a connection request. **NOTE:** If you are connecting with another user to begin exchanging data via web services, you will be prompted to read and acknowledge the organization’s Terms of Use.

When a connection request is sent, the other person will get a “Notification” on their **MyPortfolio** tab. They can accept the request directly from the notification. Once they accept your request, you will receive a confirmation. You are now connected and can share properties with your contact!

## 2

## Share Properties

You can now share your property(ies) with your connected contact(s) and specify the level of permission they have to view and/or edit your properties. You can share properties that you have created (you are the Property Data Administrator), or **Share Forward** properties that have been shared with you to your contacts. You can only share a property that has been shared with you if the person who shared it has assigned you that permission (refer to the *Permissions* and *Share Forward* information boxes below for more information). To start sharing, click the **Sharing** tab.

Click: **Share** (or **Edit Access to**) a **Property**, and then follow these steps:

1. Select the properties you want to share from the drop-down menu. You can select a single property, multiple properties, or all properties in your account. You can also select properties by using filters by primary function or state/province.
2. Select contacts to share these property(ies) with by clicking on their names. You can select multiple contacts or accounts by holding down **Ctrl** as you make each selection. If you do not see a specific contact in your list, check to see if they are listed on your **Contacts** page and have accepted your connection request.
3. If you are sharing properties with multiple users, you can choose to share with the same permission level or with different permission levels.
  - a. If you choose to give all users the same permission level, you will see a new list of radio buttons that allows you to select **Read Only**, **Full**, or **Custom Access** (where the same level of Custom Access would be given to all users). Once you have chosen the correct access level, click **Share Property(ies)** to send the sharing request.

### **Permissions**

**Read Only Access** allows others to view your property data.

**Full Access** allows others to view and edit your property data, and also re-share it with others.

**Custom Access** allows you to designate read-only or full access levels for distinct property data (e.g., property information, meter information, goals).

**Exchange Data** allows you to share your property with an organization that exchanges data with Portfolio Manager through web services.

**NOTE:** You (as the Property Data Administrator) are the only one who may delete or transfer ownership of your property.

#### 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), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

\*  I am doing a single share OR I want to choose the same permissions for all of my share requests.

- Read Only Access**
- Full Access**
- Custom Access** (meters are all shared at the same level)
- Exchange Data (Not available at this time to be set from here. Please select the other option to assign permissions one by one for each property.)
- None

I need to give different permissions for different share requests, and/or I need to give Exchange Data permissions.

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

- b. If you need to give different levels of access, select the **I need to give different permissions...** radio button, and then click **Continue**.

- i. Select permissions for each property and contact. You can sort the table by Property Name or by Contact Name.
- ii. Click the radio button at the top of each column, to select a permission level for all contacts and properties. If you choose **None**, the property will not be shared with the specified contact. If you choose **Custom Access**, you can provide separate levels of access for property information, each individual meter, goal setting, and recognition. Within Custom Access, you also have the ability to grant Share Forward permission.
- iii. Click **Share Property(ies)** to send the sharing request.

Sort by: Contact Name

| Name              | None                  | Read Only Access                 | Full Access                      | Custom Access                         | Exchange Data |
|-------------------|-----------------------|----------------------------------|----------------------------------|---------------------------------------|---------------|
| Clara Miller      | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input type="radio"/>                 |               |
| Bank Branch       | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> Edit |               |
| Federal Building  | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/>            | <input type="radio"/>                 |               |
| University Campus | <input type="radio"/> | <input type="radio"/>            | <input checked="" type="radio"/> | <input type="radio"/>                 |               |
| Jon Smith         | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input type="radio"/>                 |               |
| Bank Branch       | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> Edit |               |
| Federal Building  | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> Edit |               |
| University Campus | <input type="radio"/> | <input type="radio"/>            | <input type="radio"/>            | <input checked="" type="radio"/> Edit |               |

Some of your contacts already have access to the properties you selected. Note that by changing their access level here, you will be revoking their current access to the property and they will need to accept a new property share request from you in order to access the property again.

**Share Property(ies)** Cancel

Select Custom Access Permissions to Bank Branch for Clara Miller

Please select the permission level you would like to grant Clara Miller for Bank Branch for each category. If "None" is selected for all items, Clara Miller will not receive any access to this property.

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

Additional Options:

| Item   | Yes                   | No                               |
|--|-----------------------|----------------------------------|
| * Share Forward? Granting this permission means Cara Bastoni can share my property with others and can give them any permissions that he/she has, including the right to share with more people. | <input type="radio"/> | <input checked="" type="radio"/> |

After you share your property, you will see notifications on your **MyPortfolio** and **Sharing** tabs that the sharing request was sent, as well as notifications when the contact(s) has accepted your sharing request.

## Share Forward

The ability to **Share Forward** allows a user to share properties that have been shared with them. When you first share a property, you decide whether or not to grant Share Forward permission.

**Full Access:** This option automatically includes the ability to Share Forward. The contact will then be able to share the property with their contacts, who may or may not be connected to you. This contact can also select whether or not to grant Share Forward permission to their contacts.

**Read Only Access:** This option does NOT automatically include the ability to Share Forward.

**Custom Access:** You decide whether or not to grant the ability to Share Forward. If you grant Share Forward permission, your contact may only re-share the property with the same permission levels that they have, or less (more restricted). For example, if given Read Only Access to Property Information and Full Access to Meter Information, the contact could not share this property with another user with Full Access to the Property Information, but could share it with Read Only Access to the Meter Information.

**Exchange Data:** You decide whether or not to grant to ability to Share Forward. The same conditions as "Custom" apply.

\*At the launch of Share Forward, users with Full Access will be given Custom Access WITHOUT the ability to Share Forward. Property Data Administrators must edit permissions to include this capability for shares that already exist at that time.

## 3 Manage Your Shared Properties

Review properties you have shared with others and properties that have been shared with you.

On the **Sharing** tab:

- ✓ View sharing requests in the **Sharing Notifications** section. This includes sharing requests you have sent to others, and requests others have sent to you.
- ✓ View all of your sharing contacts and the properties you have shared in the table at the bottom of the page.
  - Click on a contact's name to view their account information and the list of properties that you both have access to.
  - Click on a property name to go to the property's Summary tab. The **Sharing this Property** table shows a list of all users with access to the property. **NOTE:** Everyone who has access to a property will be able to see the names of all others who have access, regardless of their permission levels.

### **Sharing Report**

View details on all of your shared properties and properties shared with you by downloading the **Sharing Report**. This report is accessible on the **Sharing** tab and shows basic property information, contact information, permission levels, and Share Forward permission.

**Edit permissions or remove access to shared properties.**

On the property's **Summary** tab:

- ✓ View the **Sharing this Property** table and use the **Action** drop-down menu to edit a user's permissions.
- ✓ To edit sharing permissions for all users with access to this property, click **Edit Multiple Permissions**. This will load the Edit Sharing Permissions table.

| Sharing this Property                          |                                    |                       |
|--|------------------------------------|-----------------------|
| 3 People Have Access to this Property          |                                    | <a href="#">Share</a> |
| Name   | Permissions                        | Action                |
| <a href="#">Clara Miller</a><br>(Clara_Miller) | Full Access<br>Shared by Jon Smith | I want to...          |
| <a href="#">Mary Brown</a><br>(MBrown123)      | Full Access<br>Shared by Jon Smith | I want to...          |
| Jon Smith<br>(Jon_G_Smith)                     | Property Data Administrator        | I want to...          |
| <a href="#">Edit Multiple Permissions</a>      |                                    |                       |

Sort by: [Property Name](#)

| Name (ID)   | None   | Read Only Access                 | Full Access           | Custom Access                         | Exchange Data          |
|---|--|----------------------------------|-----------------------|---------------------------------------|------------------------|
| Federal Building (4078156)  |  |                                  |                       |                                       |                        |
| <a href="#">Mary Brown</a>  | <input type="radio"/>  | <input type="radio"/>            | <input type="radio"/> | <input checked="" type="radio"/> Edit |                        |
| <a href="#">Clara Miller</a>  | <input type="radio"/>  | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/>                 |                        |
| <a href="#">Jon Smith</a>   | <b>Contact is Property Data Administrator.</b> This contact is the Property Data Administrator for this property and therefore you cannot edit their permissions. If you continue, these particular shares will not be sent. |                                  |                       |                                       |                        |
|  Some of your contacts already have access to the properties you selected. When you select "Share Property(ies)" their access levels will be changed. No acceptance is required. |  |                                  |                       |                                       |                        |
| <a href="#">Edit Permissions</a>  |  |                                  |                       |                                       | <a href="#">Cancel</a> |

## Who can edit Permissions?

- ✓ As the Property Data Administrator, you can edit the permissions of anyone with access to your property.
- ✓ Those with **Full Access** can edit anyone else's sharing permissions except for the Property Data Administrator
- ✓ Those with **Custom Access** or **Exchange Data** permission can only edit the permissions of those with whom they have directly shared the property.
- ✓ Those with **Read Only Access** cannot edit the permissions of anyone else.

**NOTE:** When you disconnect from someone, any shared properties will remain intact. If you do not want that person to have access to your properties, you will need to remove access by going to the property's **Summary** tab to remove their access.

### **Data Exchange with Web Services Providers**

A number of third party organizations (e.g., utilities, energy service providers) use web services to exchange data with their customers' Portfolio Manager accounts. Click **Search for organizations that exchange data** on the left-hand side of the **Sharing** tab if you are interested in contracting with your utility or service provider to help manage your account via web services.

To initiate web services, send a connection request to your utility or service provider. After the provider accepts the request, follow the steps in this document to share properties with the provider. Select **Exchange Data** as the access level, and follow prompts to choose specific properties and/or meters that will be managed via web services. **NOTE:** You may be required by your provider to enter further identifiers for your organization, properties, and/or meters.

### **Learn More!**

To learn more about Portfolio Manager, visit [www.energystar.gov/benchmark](http://www.energystar.gov/benchmark).  
To get answers to your questions, visit [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp).