How to Share Properties with Other Portfolio Manager Users

EPA's ENERGY STAR Portfolio Manager tool helps you measure and track the energy and water use, waste and materials, 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 for many users. 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

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1 Connect with Others

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 New Contacts/Connections**.

3. Find a Portfolio Manager user by searching for their name, organization, Portfolio Manager username, or email. **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 **My**Portfolio** 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

Now you can share your property(ies) with your connected contact(s) and specify the level of permission that the contact has 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, go to the **Sharing** tab.

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

1. Click **Select Properties.** Select the properties you want to share from the pop-up menu. You can select a single property, multiple properties, or all properties in your account. You can also select properties by using filters by property type or state/province. Click **Apply Selection** after the properties of choice have been selected.

2. Select contacts with whom to share these properties 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 are seeking to give all users the same permission level, click on "Bulk Sharing," which will present you with an additional list of radio buttons from which you can select **Read Only**, **Full**, or **Custom Access**. Once you have chosen the correct access level, click **Share Property(ies)** to send the sharing request.

    b. If you need to give different levels of access to different contacts, select the "Personalized Sharing" options and then click **Continue**.

Permissions

Read Only Access allows others to view your property data.

Full Access allows others to view and edit your property data, as well as to 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.

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 will be asked to provide separate levels of access for property information, each individual meter, goal setting, and recognition. Within Custom Access, you can also grant Share Forward permission.

iii. Click **Share Property(ies)** to send the sharing request.

After you share your property, you will see notifications on your **My**Portfolio 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 to grant Share Forward permission or not.

Full Access: 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 to grant Share Forward permission to their contacts.

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

Custom Access: You decide whether to grant the ability to Share Forward or not. If you grant Share Forward permission, your contact may only re-share the property at the same or lower (more restricted) permission levels. 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; they could only share it with Read Only Access to the Meter Information.

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

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 your sharing contacts and the properties you have shared in the table at the bottom of the page.

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

- o Click on a contact's name to view their account information and the list of properties that you both have access to.

- o 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.

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.

Sharing this Property		
3 People Have Access to this Property		⇗ Share
Name ▲	**Permissions** ⇕	**Action**
Clara Miller (Clara_Miller)	Full Access Shared by Jon Smith	I want to… ▼
Mary Brown (MBrown123)	Full Access Shared by Jon Smith	I want to… ▼
Jon Smith (Jon_G_Smith)	Property Data Administrator	I want to… ▼
		✎ Edit Multiple 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, shown below.

Sort by: Property Name ▼					
Name (ID)	**None** ◯	**Read Only Access** ◯	**Full Access** ◯	**Custom Access**	**Exchange Data**
▼ Federal Building (4078156)					
Mary Brown	◯	◯	◯	◉ Edit	
Clara Miller	◯	◉	◯	◯	
Jon Smith	⛔ Contact is Property Data Administrator- 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 Propert(ies)" their access levels will be changed. No accpetance is required.					
				Edit Permissions	Cancel

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 as detailed above.

💬 *Data Exchange with Web Services Providers*

A number of third-party organizations (e.g., utilities, energy service providers) use web services to exchange data directly between their databases and their customers' Portfolio Manager accounts. Web service providers must be approved by EPA before they are able to receive incoming shares at the "Exchange Data" level. For this reason, the "Exchange Data" sharing option will not be available if you are trying to share a property with a Portfolio Manager user that is not an approved web services provider.

To learn whether your utility offers the ability to exchange data via Portfolio Manager web services, please visit our [Find Utilities Page](#) and view the interactive map and fact sheet. An additional list of software companies and other third parties that offer data exchange via Portfolio Manager can be found [here](#). You can also go to the "ENERGY STAR Notifications" link at the top of any Portfolio Manager page, which will let you know if you have buildings located in the service territory of utilities that offer web services. Before sending a connection to a utility, please be sure to click through on the provided link for more guidance about the utility's specific process by which customers will initiate web services/data exchange shares. For instance, some utilities require Portfolio Manager users to share access to both properties and meters, while others require property-level shares only. Furthermore, some utilities may require users to begin the process via a separate online portal, before initiating the actual property/meter share through Portfolio Manager. And finally, you may be required by your utility to enter further identifiers specific to your organization, properties, and/or meters.

To initiate web services, you will need to send a connection request to your utility or service provider. After the provider accepts the request, go to the **Sharing** tab, and select "Share with your Utility or Service Provider for exchanging data". This sharing pathway involves the same basic steps outlined in Section 2 above. However, the process is optimized for the specific case of web services/data exchange shares.

💬 *Learn More!*

To learn more about Portfolio Manager, visit www.energystar.gov/benchmark.

To get answers to your questions, visit www.energystar.gov/buildingshelp.