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.

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!
Share Properties

Now you can share your propert(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 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. 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 propert(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.

   b. If you need to give different levels of access, select the I need to give different permissions... radio button, 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, 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.
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.

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.

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### 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 or not 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 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 to grant ability to Share Forward or not. 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.*
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.

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, shown below.

Sharing Report

View details on all of 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.
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.

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### 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.

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### 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).