

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 results to identify under-performing buildings, set investment priorities and verify efficiency improvements.

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 to 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” with 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!

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Share Properties

You can now 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 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 by state/province.
2. Select contacts to share your 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**.
 - i. Select permissions for each property and contact. You can sort the table by Property Name or by Contact Name.

Permissions

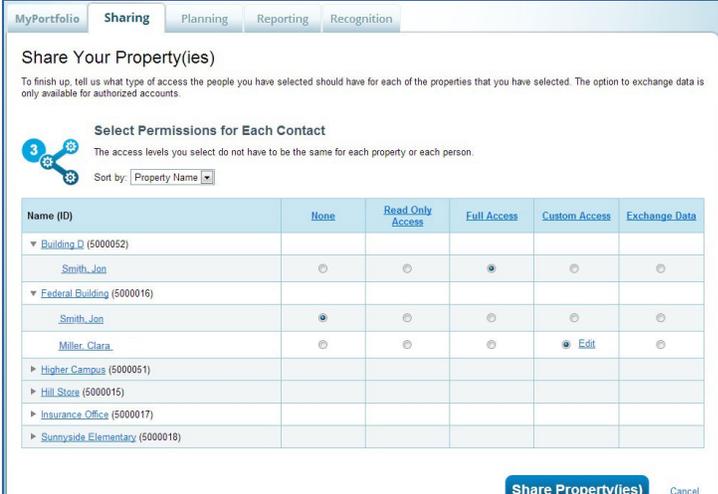
Read Only Access allows others to view your property data.

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.



The screenshot shows the 'Share Your Property(ies)' interface. At the top, there are tabs for 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. Below the tabs, the title is 'Share Your Property(ies)'. A sub-header reads 'Select Permissions for Each Contact'. Below this, there is a note: 'The access levels you select do not have to be the same for each property or each person.' and a 'Sort by: Property Name' dropdown menu. The main part of the interface is a table with columns: 'Name (ID)', 'None', 'Read Only Access', 'Full Access', 'Custom Access', and 'Exchange Data'. The table contains several rows, each representing a property and its associated contacts. For example, under 'Building D (5000052)', there is a contact 'Smith, Jon' with radio buttons for 'None', 'Read Only Access', 'Full Access', 'Custom Access', and 'Exchange Data'. The 'Full Access' radio button is selected for this contact. Other properties listed include 'Federal Building (5000016)', 'Higher Campus (5000051)', 'Hill Store (5000015)', 'Insurance Office (5000017)', and 'Sunnyside Elementary (5000018)'. At the bottom right of the table, there is a 'Share Property(ies)' button and a 'Cancel' link.

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Building D (5000052)					
Smith, Jon	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
▼ Federal Building (5000016)					
Smith, Jon	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Miller, Clara	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/> Edit	<input type="radio"/>
▶ Higher Campus (5000051)					
▶ Hill Store (5000015)					
▶ Insurance Office (5000017)					
▶ Sunnyside Elementary (5000018)					

- 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 that the contact 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 Meter Information.

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

* At the launch of Share Forward, users with Full Access were given Custom Access WITHOUT the ability to Share Forward. Property Data Administrators must edit permission to include this capability for shares that existed 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 from the **Sharing** tab, and shows basic property information, contact information, permission levels, and Share Forward permissions.

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.

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 the Property Data Administrator.
- ✓ Those with **Custom Access** or **Exchange Data** permissions 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 to see if your utility or service provider can 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.nrcan.gc.ca/energystarportfoliomanager.

To get answers to your questions, e-mail info.services@nrcan-rncan.gc.ca or phone 1-877-360-5500 (toll-free) / 613-992-3245 in the National Capital Region.