

Share Facilities

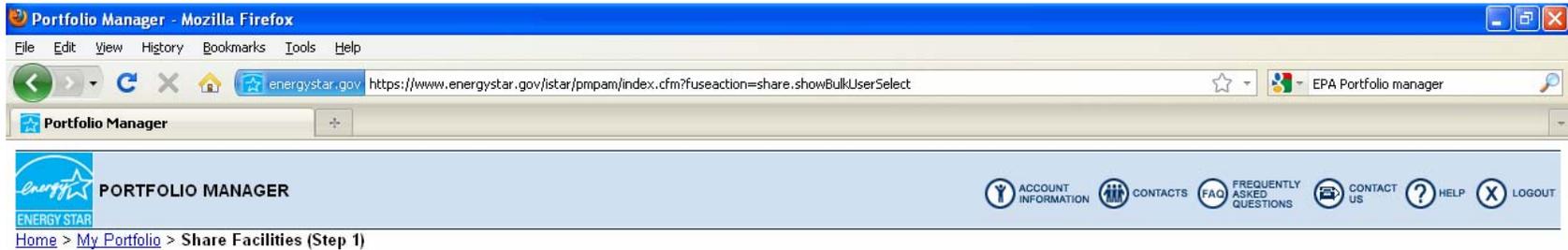
The screenshot shows the Energy Star Portfolio Manager interface. At the top, there's a navigation bar with the Energy Star logo and 'PORTFOLIO MANAGER'. Below that, a 'Home > My Portfolio' breadcrumb is visible. The main content area is divided into two columns. The left column contains 'Portfolio Averages' with a table showing Baseline Rating (74), Current Rating (79), and a 6.7% change in energy use. The right column lists various actions: 'Add a Property', 'Import Facility Data Using Templates', 'Work with Facilities' (with 'Share Facilities' circled in red and a red arrow pointing to it), 'Reporting and Analysis', 'Apply for Recognition', and 'Automated Benchmarking'. At the bottom, there's a table of facilities with columns for Facility Name, Current Rating, Change from Baseline, Total Floor Space, Energy Use Alerts, Current Energy Period Ending Date, Eligibility for the ENERGY STAR, and Last Modified. The first row shows '10 South' with a current rating of 91 and a change from baseline of -19.6%.

Facility Name	Current Rating (1-100)	Change from Baseline: Adjusted Energy Use (%)	Total Floor Space (Sq. Ft.)	Energy Use Alerts	Current Energy Period Ending Date	Eligibility for the ENERGY STAR	Last Modified
10 South	91	-19.6	705,404		12/31/2009	Eligible to Apply for the ENERGY STAR	02/05/2010

1) Click on "Share"



Share Facilities



Select User or Master Account

Users with whom you share facilities will now be able to see your name and e-mail address on their Facility Summary page for that shared facility. In addition, users will also have the option to select your name and email address to appear in their custom views. Select Cancel if you do not wish to share any facilities.

Portfolio Manager provides the ability to share multiple facilities from your account with other users of the system in a single transaction. Users with whom access is being shared or removed MUST have a Portfolio Manager user account. To share facilities, select a Portfolio Manger user in Step 1.

If you are only removing access to facilities in your account, select "Remove this User's Access" in Step 1 after selecting a user from the Current Access List or enter a username in the textbox. You will then be able to select all of the facilities from which you want to remove this user's access.

STEP 1: Select the account to which you want to grant access, modify existing access or remove access rights.

Portfolio Manager User:

Enter Portfolio Manager Username:

- OR -

Select a Portfolio Manager Master Account: [Learn more](#) about Master Accounts

ADD AND MODIFY **DELETE** **CANCEL**

2) Select "City of Houston-HOUSTONGREENOFFICECHALLENGE"

3) Click "ADD AND MODIFY"



Share Facilities



Select Access Rights for Heather Smith - City of Houston

STEP 2: Select the set of Access Rights you want to provide this User.

Access Role	Access Rights
<input type="radio"/> Facility/Profile Editor	(1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; (4) Create/Edit a Building Profile
<input type="radio"/> Facility Editor	1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; May NOT create/edit a Building Profile
<input type="radio"/> Profile Editor	1) Create/Edit a Building Profile; May NOT edit any other data for this facility, generate a Statement of Energy Performance or submit an ENERGY STAR Building Application
<input checked="" type="radio"/> Read Only	Read Access only; May NOT edit any data for this facility, generate a Statement of Energy Performance, submit an ENERGY STAR Building Application or create/edit a Building Profile

Optional Rights (rights that are added to the selected access role)

Can this user set a baseline for the shared facilities? Yes No
(Note: There is only one baseline date per facility.)

Can this user provide access to the shared facilities with other users? Yes No
(Note: A user cannot delegate any access role greater than their own. See table above. All users who are given this right will be able to assign this right to other users.)

Can this user delete the shared facilities from your account? Yes No
(Note: This right is reserved only for Facility/Profile Editors or Facility Editors.)

STEP 3: Specify the group from this user's account to place the shared facility(ies). [Learn more](#) about sharing into groups.

Main Portfolio ▼

4) Select "Read Only"

5) Select "No" to all Optional Rights

6) Click "Continue"

CANCEL CONTINUE



Share Facilities



Select Facilities to Share with Heather Smith - City of Houston

Select all facilities for which you would like to provide this user with access. To remove access, uncheck the checkbox next to that facility. Note: you will only be able to share facilities that you currently have access to share.

The access role and rights you selected in Step 2 are:

Access Role: **Portfolio Manager General User**

Able to Set Baseline? **No**

Able to Delegate Access? **No**

Able to Delete Facility? **No**

Accessible to User through: **Main Portfolio**

The "Current Access Level" columns allow you to see whether this user has already been provided access to this facility by you or another user. If you choose to change the access role here, your selection will replace the current access role.

If the access role or optional rights for a particular facility listed below in the "New Access Level" columns do not match those listed above, you do not have access to share that facility at the level you have chosen in Step 2. You can either choose to select the recommended access role/rights listed in the "New Access Level" columns below or provide a different level of access to that user at a later date.

STEP 4: Select all facilities in your account that you would like to share with Heather Smith.

Select Facilities to Share <small>(uncheck to Remove Access)</small>	Facility Name	Current Access Level		New Access Level	
		Access Role <small>(provided by)</small>	Optional Rights	Access Role	Optional Rights
<input type="checkbox"/> Select all <input checked="" type="checkbox"/>	Sample Facility	None	None	Portfolio Manager General User	Set Baseline? No Delegate? No Delete? No

7) Select the property or properties that you will “share” in the Houston Green Office Challenge

8) Click “Continue”



Share Facilities

The screenshot shows the EPA Portfolio Manager interface in a Mozilla Firefox browser. The page title is 'Portfolio Manager - Mozilla Firefox'. The address bar shows the URL 'https://www.energystar.gov/istar/pmpam/index.cfm'. The page header includes the Energy Star logo and 'PORTFOLIO MANAGER' text, along with navigation links for Account Information, Contacts, FAQ, Frequently Asked Questions, Contact Us, Help, and Logout. The breadcrumb trail is 'Home > My Portfolio > Share Facilities (Steps 1 and 2) > Share Facilities (Step 3) > Share Facilities (Step 4)'. The main content area is titled 'Confirmation' and contains the following text: 'You have identified the following facility access changes for **Heather Smith, City of Houston**. Please review these selections below. If you want to proceed with making these changes for this user, select "Save." The user will receive an e-mail confirming this change has been made to their account (along with a copy to you). Select "Cancel" to return to Step 4 to make any needed adjustments.'

STEP 5: Confirm that all access changes are correct

Access Provided to: **Heather Smith, City of Houston**
Accessible to User through: **Main Portfolio**

Access Role: **Portfolio Manager General User** Able to Set Baseline? **No** Able to Delegate Access? **No** Able to Delete Facility? **No**

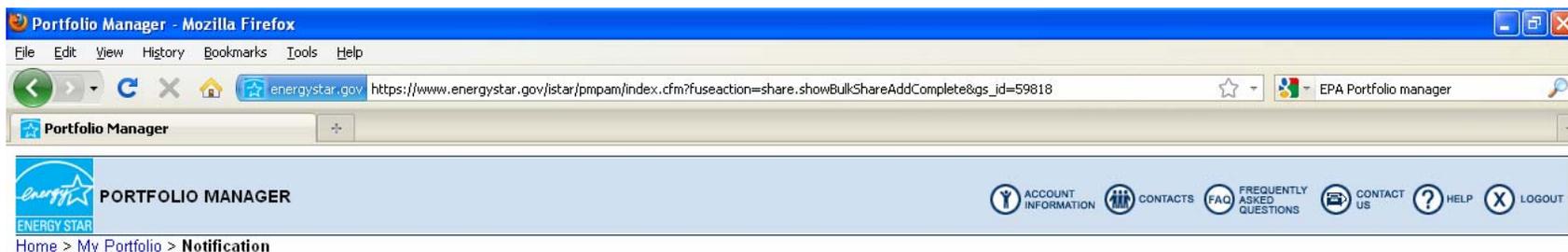
Facilities where Access is being granted	Facilities where Current Access Role/Rights are being changed	Facilities where Access is being removed
Sample Facility		

At the bottom of the form, there are two buttons: 'CANCEL' and 'SAVE'. A red circle highlights the 'SAVE' button, with a red arrow pointing to it from the right.

9) Review and confirm that all details are correct

10) Click "Save"

Share Facilities



Notification

An e-mail has been sent to Heather Smith indicating facilities have been shared. You will be notified by e-mail if Heather Smith accepts or rejects the facilities you shared.

[RETURN](#)

11) Click "Return"

12) Once the Master Account accepts your portfolio, you will receive 2 confirmation e-mails:

- "Confirmation of Facility Access Changes"
- "Shared Facilities Accepted"