



Share Energy Performance Data with a Master Account in Portfolio Manager

A master account is a specially designated Portfolio Manager account into which several entities using Portfolio Manager can share building and energy information for one or more facilities. Follow the instructions below, along with any specific guidance provided by the master account administrator, to share your energy performance data in your Portfolio Manager account with the specified master account.

STEP	ACTIVITY	ACTION
	Access Portfolio Manager	www.energystar.gov/benchmark
	Access your account	<ul style="list-style-type: none"> • Create a new account • Login to an existing account
	Begin sharing facility with master account	<ul style="list-style-type: none"> • Click REGISTER next to "New User?" • Enter username and password. • From the "Welcome" page, click ACCESS MY PORTFOLIO • Add a new property: http://www.energystar.gov/ia/business/downloads/PM_QuickRefGuide.pdf OR • Use building(s) in existing account.
	Set access roles	<ul style="list-style-type: none"> • a.) On "My Portfolio" page, click on "Share Facilities." • b.) Select the LA BBC Account from the drop-down list. Click ADD AND MODIFY.
	Select facilities to share	<ul style="list-style-type: none"> • Review the "Access Rights" and make a selection. Select 'Read Only' • Review the "Optional Rights" and make any changes if wanted. • <i>Optional:</i> Select a "Group" from the drop-down list in which to share your facility, if applicable. • Click CONTINUE.
	Confirm settings	Review confirmation and click SAVE.

Under Optional Rights, select 'yes' to setting the baseline, and select 'yes' to 'provide access to shared facilities with other users. Select 'no' to user having access to delete facilities.'

The screenshots illustrate the following steps in the Portfolio Manager interface:

- 3a:** The "My Portfolio" page showing a table of facilities. A green arrow points to the "Share Facilities" link.
- 3b:** The "Share Facilities (Step 1)" page. A dropdown menu is open, showing "LA BBC Account" selected. A red arrow points from the instruction in the table to this selection.
- 4:** The "Share Facilities (Steps 2 and 3)" page. A table of access rights is shown, with "Read Only" selected. A red arrow points from the instruction in the table to this selection.
- 5:** The "Share Facilities (Steps 2 and 3)" page. A table of facilities is shown, with "Any Stadium" selected. A red arrow points from the instruction in the table to this selection.