



Sharing and Transferring Facility Data

To make it easier to manage energy performance across your organization, Portfolio Manager allows you to share or transfer access to facility data with other Portfolio Manager users.

Take advantage of the following features to better manage energy information throughout your organization.

Benefits

Sharing data allows you to:

- Share facility data with other Portfolio Manager users who may need access to the information.
- Control the list of people who have access to your facility data.

Transferring data allows you to:

- Transfer the ability to edit facility data to someone else on a facility-by-facility basis.
- Consolidate multiple facilities from several accounts into one account.

How to Share or Transfer a Facility

From the "My Portfolio" page, follow these steps to share access to your facility's data or transfer the data to another Portfolio Manager user.

1. Click the name of the facility.
2. Within the Sharing Data section of the page, click one of the two following links:
 - Add User to Share this Facility; or
 - Transfer Facility to Another User.
3. Enter the Portfolio Manager username of the person with whom you want to share or transfer facility data. NOTE: The person must already have a Portfolio Manager account.
4. Click CONTINUE.
5. Confirm that the correct person is listed on the screen and click CONTINUE.
6. Select the appropriate access role and any additional rights the user should be granted. Click SAVE. (See the back of this page for access levels.)
7. Review the list.
8. Click DONE. You will be returned to the Facility Summary page.

**For more information,
select HELP or CONTACT US
from the top of any
Portfolio Manager screen.**

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Assigning Access to Facility Data

When sharing facility data, you choose the level of access to grant to other Portfolio Manager users.

Levels of Access

- **Facility/Profile Editor**—Allows full access for a user to edit facility data, including the ability to: generate a Statement of Energy Performance; submit a Label application; and create and edit Building Profiles for labeled facilities.
- **Facility Editor**—Allows limited access for a user to edit facility data, but does not allow the user to create or edit a Building Profile.
- **Profile Editor**—Allows limited access for a user to create and edit a Building Profile, but does not allow the user to edit facility data.
- **Read Only**—Most restricted access, which only allows a user to view facility data, but not edit it.

You can also control access to facility data by making use of the following two features:

- **Provide Access to Others**—Allows a user to give access to facility information to other Portfolio Manager users. A user cannot grant access rights higher than their own (e.g., someone with Read Only access cannot grant Profile Editor access to another user).
- **Access to Delete Facility**—Allows a user to delete a facility from the system. This access can only be granted to Facility/Profile Editors and Facility Editors.

To get started, determine who in your organization should have access to your facility data and which level of access is appropriate. You may want to draw an organizational chart to identify key stakeholders who need the information provided in Portfolio Manager. From there, you can decide how much authority they should be given to edit, create, and delete information associated with each facility.

The following is an example of how one might assign access rights across a company.

