Better Buildings Data Sharing Instructions

Participation in the Better Buildings Challenge requires 1) managing your buildings energy data through the [EPA Portfolio Manager](#) free online system, and 2) sharing your data with US Department of Energy

If Partners are using Portfolio Manager, they can automatically submit facility-level data to DOE for program updates every six months through a sharing feature within Portfolio Manager. DOE will send out a reminder email two weeks in advance of each collection so that each Partner can confirm the accuracy and completeness of data before it is submitted for the Better Buildings Challenge program. If a Partner is not using Portfolio Manager, the Better Buildings Challenge program team can provide support to share facility and energy-use data.

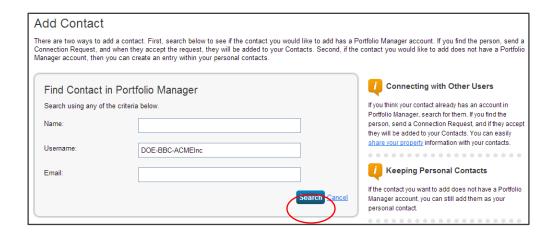Below are step-by-step instructions on how to share data using Portfolio Manager.

1. Log in to your Portfolio Manager account and locate the Contacts link on the top right corner of the page.
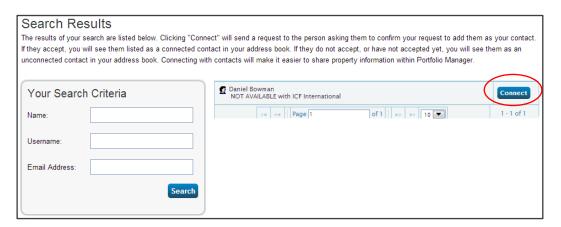

2. On the Contacts page, click the Add Contact button.

3. Enter the account name DOE-BBC-Milwaukee in the text box marked "Username:" in the Find Contact in Portfolio Manager section. Then click "Search."
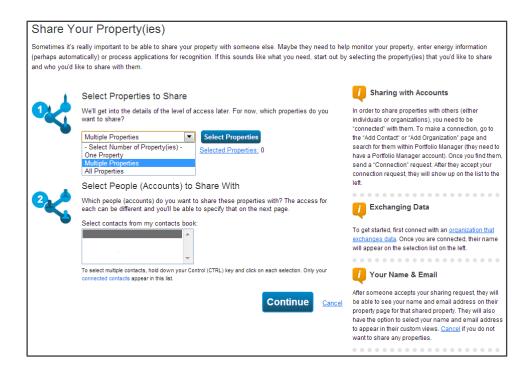
Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account. If you find the person, send a Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact you would like to add does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:

Username: DOE-BBC-ACMEInc

Email:

Search | Cancel

i Connecting with Other Users

If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily share your property information with your contacts.

i Keeping Personal Contacts

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

4. **DOE-BBC-Milwaukee** will appear in the Search Results section on the next page. Click the Connect button. A notification will be sent to DOE. Once the connection request is accepted, you will be able to share properties with the Challenge.
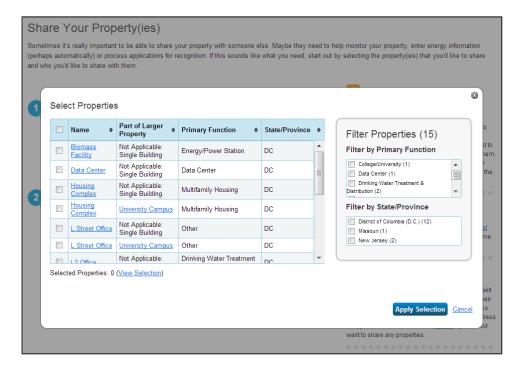
Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Username:

Email Address:

Search

Daniel Bowman
NOT AVAILABLE with ICF International

Connect

Page 1 of 1 | 10 | 1 - 1 of 1

5. Once the connection has been made, click on the Sharing tab and then click Share a Property.

ENERGY STAR®
PortfolioManager™

Welcome   Account Settings | Contacts | Help | Sign Out

MyPortfolio | **Sharing** | Planning | Reporting | Recognition

My Shared Properties (0)

Share a Property

Sharing Notifications (0)

You have no new notifications.

My Shared Properties (0)

6. Select the number of properties that you would like to share with the Challenge. It can be one, multiple, or all of the buildings in your organization's Portfolio Manager account.

7. If you select the multiple option, you will see a Select Properties button. Click the button and choose the properties that you would like to share. You can filter the properties by type or location. Click Apply Selection.

8. Choose the account name provided by DOE in the Select People (Accounts) to Share With section. Click Continue.

9. In the Select Permissions page, select "Read Only" for all properties. You can sort your properties by Property Name or by Contact Name. Since you will only be sharing with one Contact, it is easy to view by Contact Name.

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Sort by: Contact Name ▼
| Property Name |
| Contact Name |

Name	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Bowman, Daniel					
Biomass Facility (3430441)	○	◉	○	○	
Data Center (3507164)	○	◉	○	○	
Housing Complex (3388877)	○	◉	○	○	
L Street Office (3424054)	○	◉	○	○	

10. Select Share Properties to complete the share. You will receive a notification when your properties have been accepted by the Challenge.

Share Property(ies)

11. Repeat steps 3-10, sharing your data with the account name: CITY-OF-MILWAUKEE