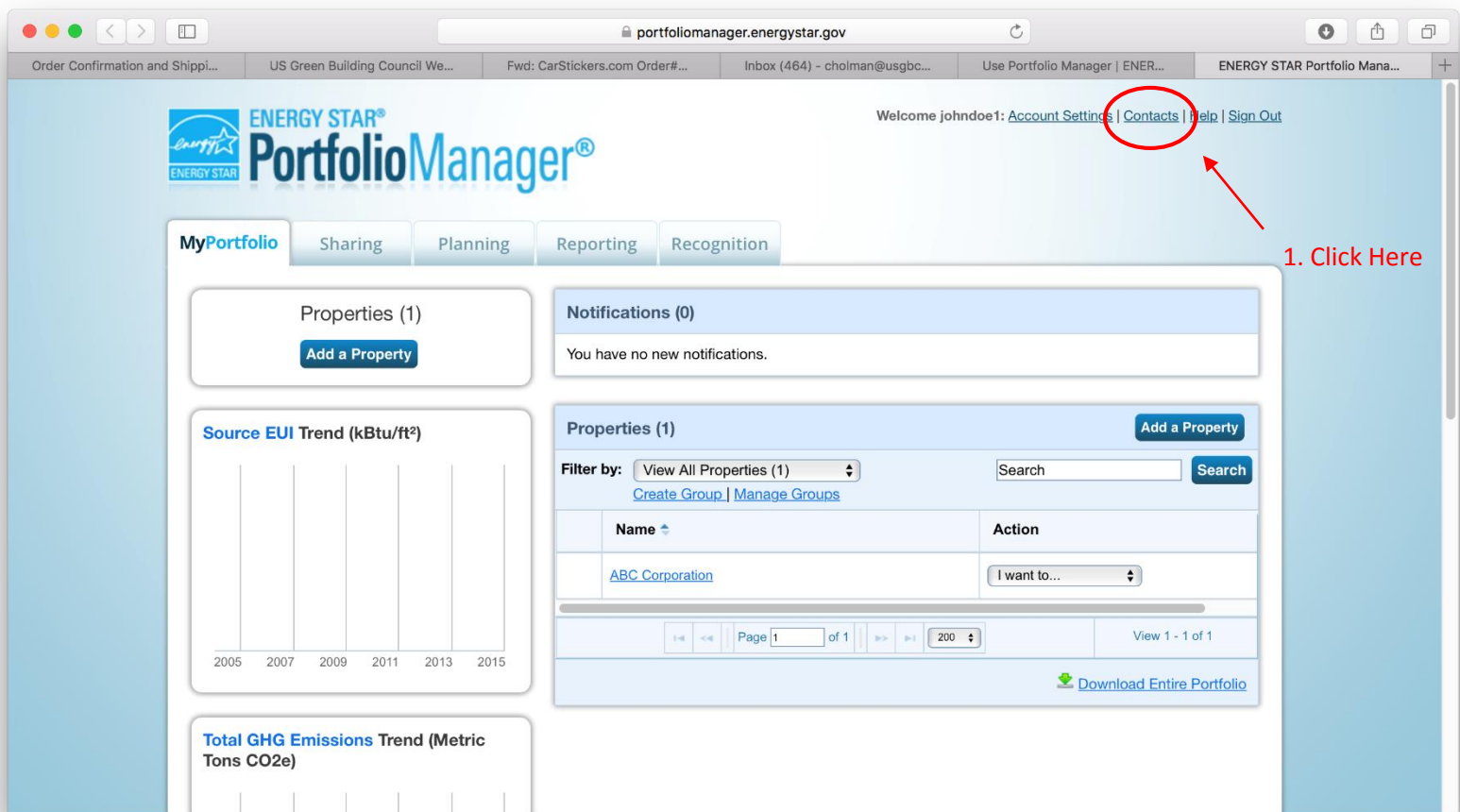


How to Share your Building with the Grand Rapids 2030 District in Portfolio Manager

Log into Energy Star Portfolio Manager (PM).

1. On your main page, in the upper right hand corner click on the contacts tab.



The screenshot shows the Energy Star Portfolio Manager web application. The browser address bar displays 'portfoliomanager.energystar.gov'. The top navigation bar includes links for 'Account Settings', 'Contacts', 'Help', and 'Sign Out'. The 'Contacts' link is circled in red, and a red arrow points to it with the text '1. Click Here'. Below the navigation bar, the 'MyPortfolio' section is visible, featuring tabs for 'Sharing', 'Planning', 'Reporting', and 'Recognition'. The main content area displays a 'Properties (1)' section with a table listing one property, 'ABC Corporation', and a 'Total GHG Emissions Trend' chart.

Welcome johndoe1: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | [Sharing](#) | [Planning](#) | [Reporting](#) | [Recognition](#)

Properties (1) | [Add a Property](#)

Notifications (0)
You have no new notifications.

Source EUI Trend (kBtu/ft²)
2005 2007 2009 2011 2013 2015

Properties (1) | [Add a Property](#)

Filter by: [View All Properties \(1\)](#) | Search | [Create Group](#) | [Manage Groups](#)

Name	Action
ABC Corporation	I want to...

Page 1 of 1 | 200 | View 1 - 1 of 1

[Download Entire Portfolio](#)

2. Once in the “My Contacts” page you will need to search for GR2030 in the upper right hand search bar.
3. Click search for new contacts

Welcome USGBCWM: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

ENERGY STAR® **PortfolioManager**®

MyPortfolio | Sharing | Planning | Reporting | Recognition

My Contacts

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can “connect” to other Portfolio Manager users by searching for their accounts and sending a connection request.

Share Edit Delete Add Contact Add Organization

All	Name	Organization
2	Grand Rapids 2030 District (GR2030)	U.S. Green Building Council West Michigan Chapter
A	Connected Executive Director	
B	Progressive AE (Michigan Battle of the Buildings Verification)	ProgressiveAE
C	Verified	
D	Grand Rapids Art Museum (GRARTMUSEUM)	Grand Rapids Art Museum
E	Connected	
F	Facilities Manager	

4. Results of search will appear
5. Press connect

Welcome USGBCWM: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

ENERGY STAR® **PortfolioManager**®

MyPortfolio | Sharing | Planning | Reporting | Recognition

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:

Organization:

Username:

Email Address:

Grand Rapids 2030 District
Executive Director with U.S. Green Building Council West Michigan Chapter

Page 1 of 1 1 - 1 of 1

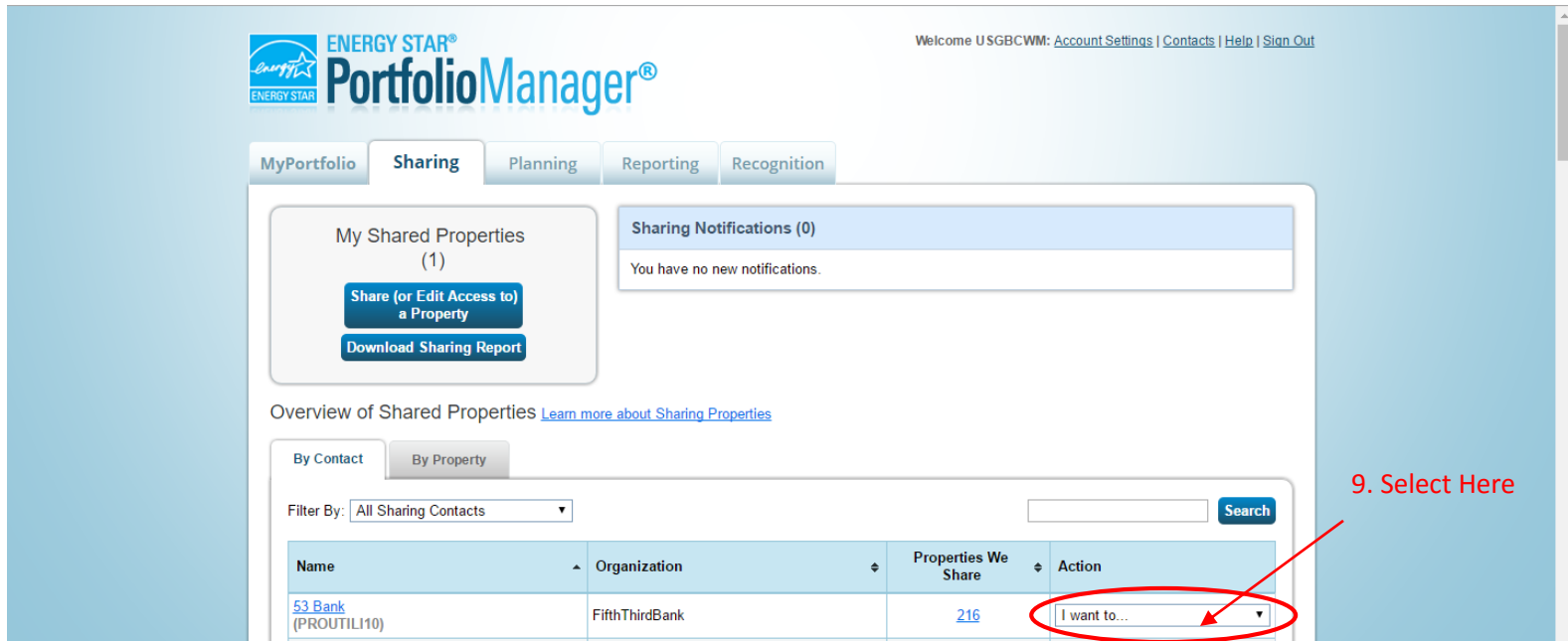
- You will then wait (24-48 hours) for GR203 to accept you as a connection.
- You will know the connection has been accepted by GR2030 the next time you log in and see a notification on your home page.

The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top, there is a navigation bar with tabs for MyPortfolio, Sharing, Planning, Reporting, and Recognition. The MyPortfolio tab is active. Below the navigation bar, there are several sections: Properties (374) with an 'Add a Property' button, a Notifications section (circled in red) showing a message 'You are connected to Grand Rapids 2030 District.', a Properties (374) section with a search bar and a table of properties, and a Manage Portfolio section with a 'Transfer ownership' link. The table of properties has columns for Name and Action, with entries for 1131 Church, 1390, and 1425 Michigan, each with an 'I want to...' dropdown menu.

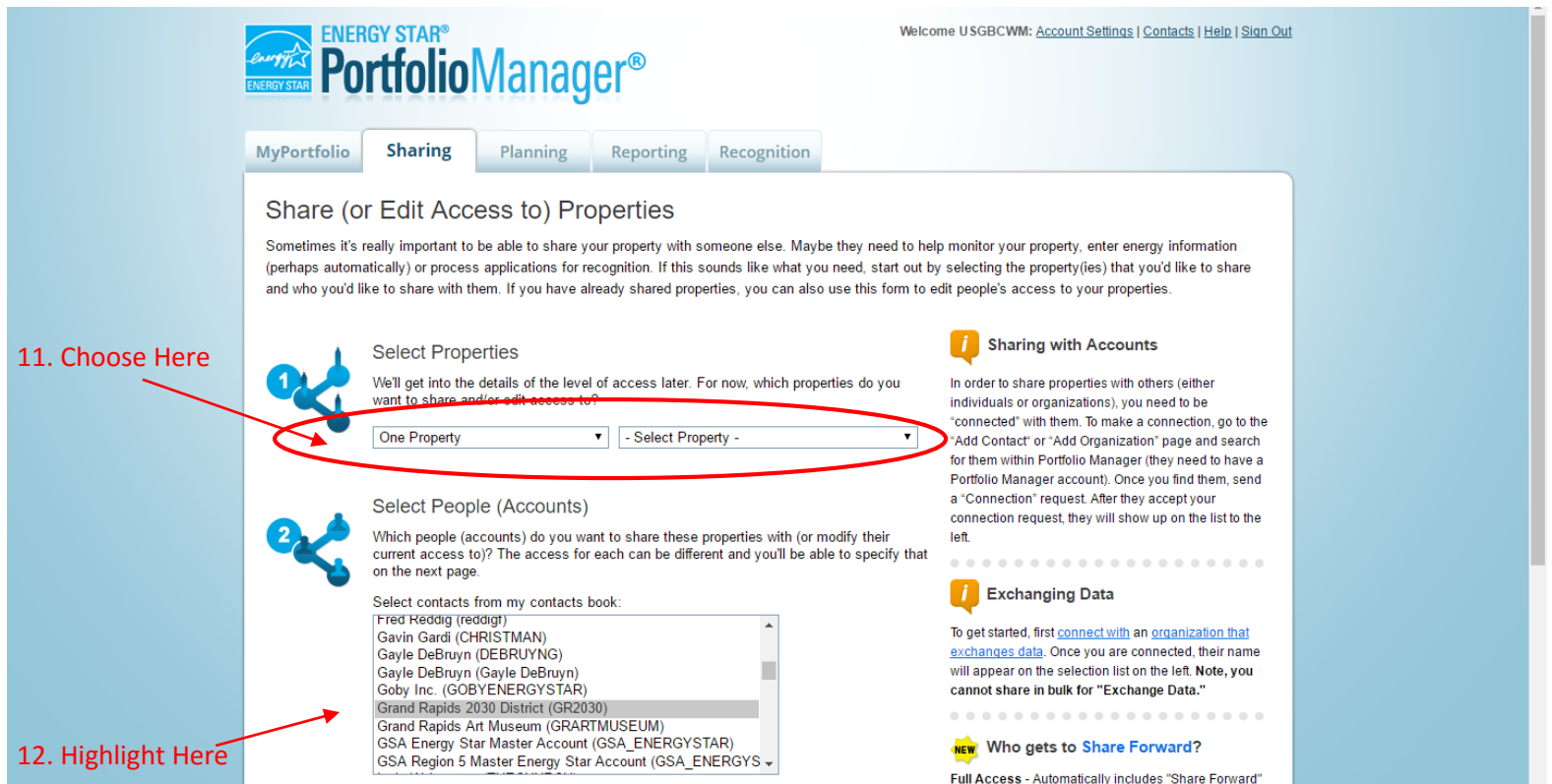
- Now for sharing. Click on the share tab on the top of your homepage.

The screenshot shows the ENERGY STAR Portfolio Manager interface, similar to the previous one, but with the Sharing tab highlighted in red. A red arrow points from the text '8. Click Here' to the Sharing tab. The Notifications section is no longer visible. The Properties (374) section is still present, along with a Source EUI Trend (kBtu/ft²) chart showing data from 2005 to 2015. The table of properties is also visible, with entries for 1131 Church, 1390, and 1425 Michigan.

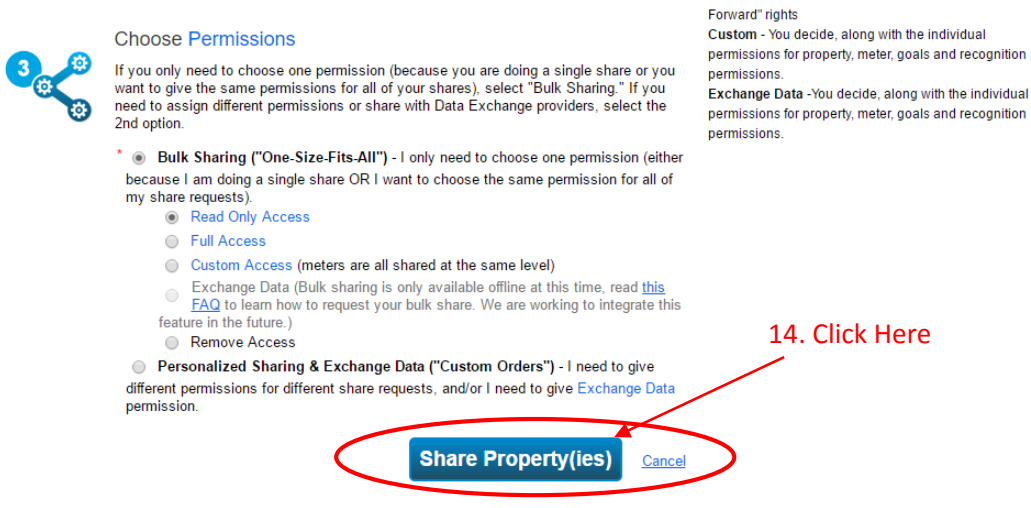
9. The sharing page will show a list with all of your properties. Choose any property and select the “I Want To” tab located on the right hand side of the screen.
10. Scroll to the bottom and choose “Share Properties with Contact”



11. Under “Select Properties” choose how many and which properties you’d like to share
12. Highlight GR2030



13. Under “Choose Permission” select bulk sharing, and then select read only access
14. Click share property to finish



3 Choose **Permissions**

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

* **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).

- Read Only Access**
- Full Access**
- Custom Access** (meters are all shared at the same level)
- Exchange Data** (Bulk sharing is only available offline at this time, read [this FAQ](#) to learn how to request your bulk share. We are working to integrate this feature in the future.)
- Remove Access**

Personalized Sharing & Exchange Data ("Custom Orders") - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

Forward rights
Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
Exchange Data - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

14. Click Here

Share Property(ies) [Cancel](#)

Thank you for sharing your property with the Grand Rapids 2030 District. We appreciate the time and effort you have put forward to help us reach our goals.