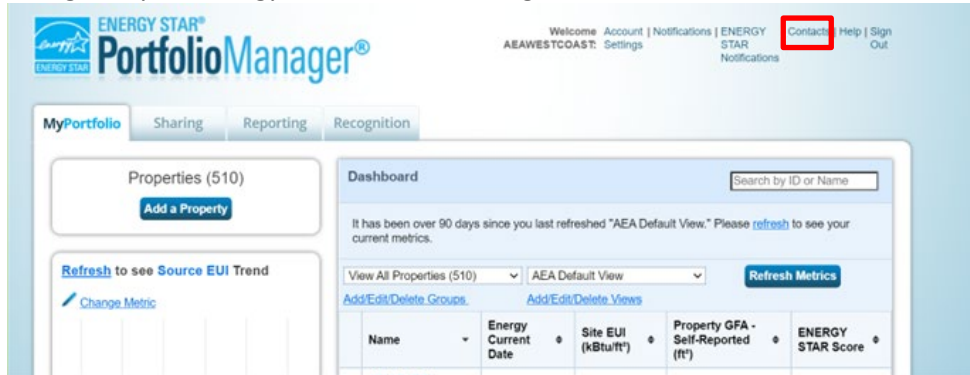
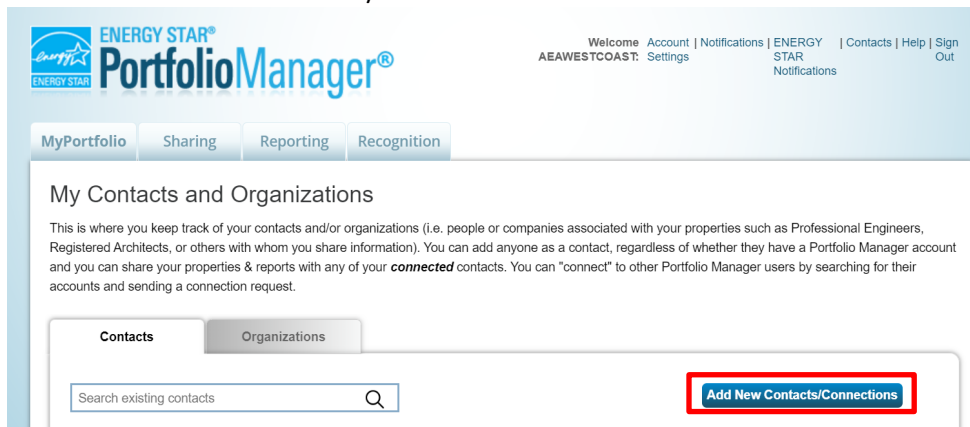


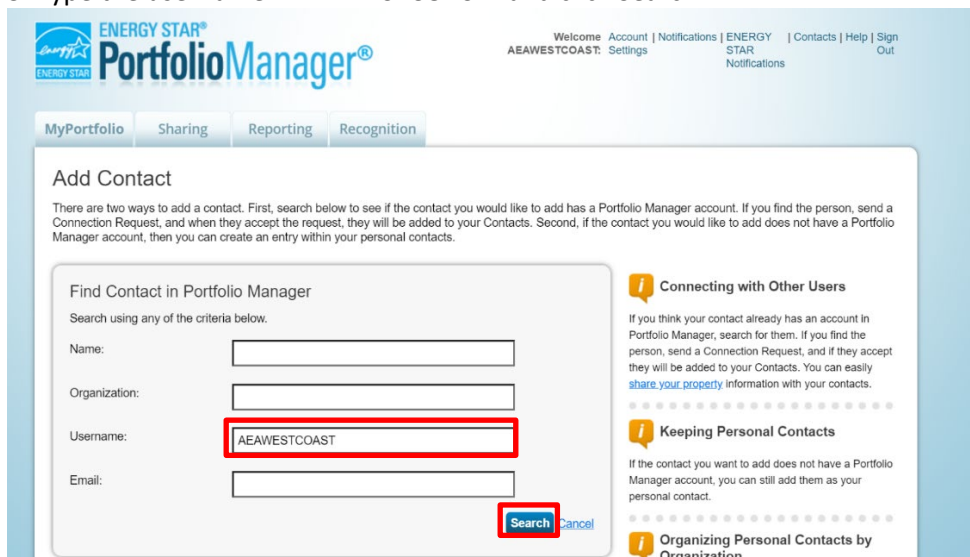
1. Log into your Energy Star Portfolio Manager account and click on “Contacts”.



2. Click on “Add New Contacts/Connections”.



3. Type the username: “AEAWESTCOAST” and click Search.



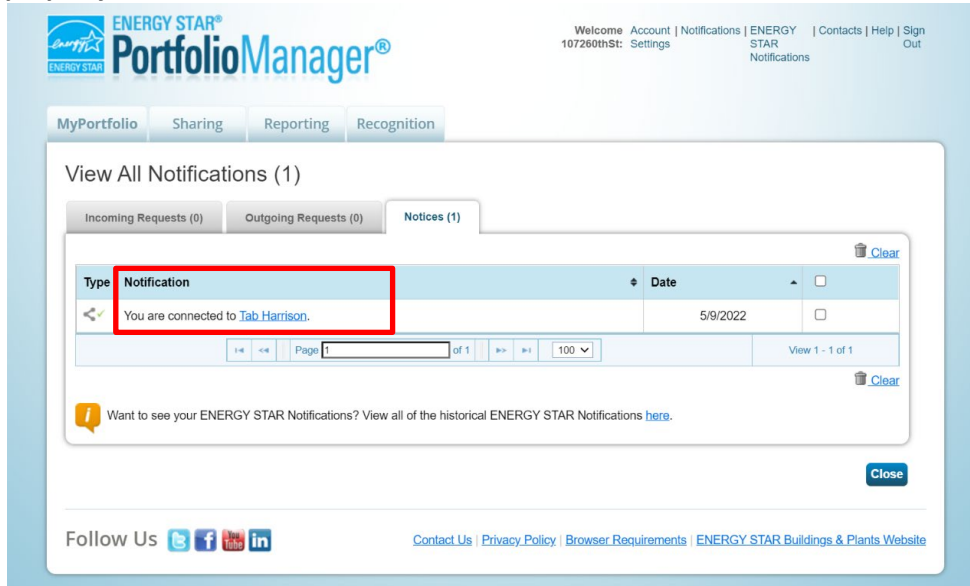
3a. The account name it is under is “Tab Harrison (AEAWESTCOAST).” Click Connect.

The screenshot shows the Energy Star Portfolio Manager interface. At the top, there is a navigation bar with links for Welcome, Account, Notifications, ENERGY STAR, Contacts, Help, and Sign Out. Below this is a secondary navigation bar with tabs for MyPortfolio, Sharing, Reporting, and Recognition. The main content area is titled "Search Results" and contains a search criteria form on the left and a list of search results on the right. The search criteria form includes fields for Name, Organization, Username (filled with "AEAWESTCOAST"), and Email Address, along with a Search button. The search results list shows one result: "Tab Harrison (AEAWESTCOAST) Energy Analyst with The Association for Energy Affordability". A red box highlights the "Connect" button next to this result. Below the search results is a pagination control showing "Page 1 of 1" and "1 - 1 of 1". At the bottom of the page, there are social media links for Twitter, Facebook, YouTube, and LinkedIn, along with links for Contact Us, Privacy Policy, Browser Requirements, and ENERGY STAR Buildings & Plants Website.

3b. This will pop up on your page, confirming that you have sent a connection request.

The screenshot shows the Energy Star Portfolio Manager interface after a connection request has been sent. The search criteria form and search results are still visible, but a yellow notification box has appeared in the center of the page. The notification box contains the text: "A connection request has been sent to Tab Harrison" and "When Tab accepts your request, you will be able to share property information." The notification box is highlighted with a red border. The rest of the interface, including the navigation bars and footer, remains the same as in the previous screenshot.

3c. Once we have accepted your connection request, you will receive a notice saying you're connected and can move onto the next step. However, if you are **not connected**, you will **not be able to share the property**.



4. To share the property, go to the property that you would need to share with us and at the very bottom of the Summary tab, click Share.

MyPortfolio | Sharing | Reporting | Recognition

1011 S. B St
 1011 S. B St, San Mateo, CA 94401 | [Map It](#)
 Portfolio Manager Property ID: 4735471
 Year Built: 1931

Weather Normalized Source EUI (kBtu/ft²)
 Current: 8.2 (93.05% lower than median)
 Baseline: 13.0 (89% lower than median)

Summary | Details | Energy | Water | Waste & Materials | Goals | Design

Metrics Summary

Metric	Nov 2013 (Energy Baseline)	Dec 2015 (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	13.4	8.2	-5.20 (-38.80%)
Site EUI (kBtu/ft ²)	12.3	7.5	-4.80 (-39.00%)
Energy Cost (\$)	1,072.56	814.64	-257.92 (-24.00%)
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	0.7	0.4	-0.30 (-42.90%)
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

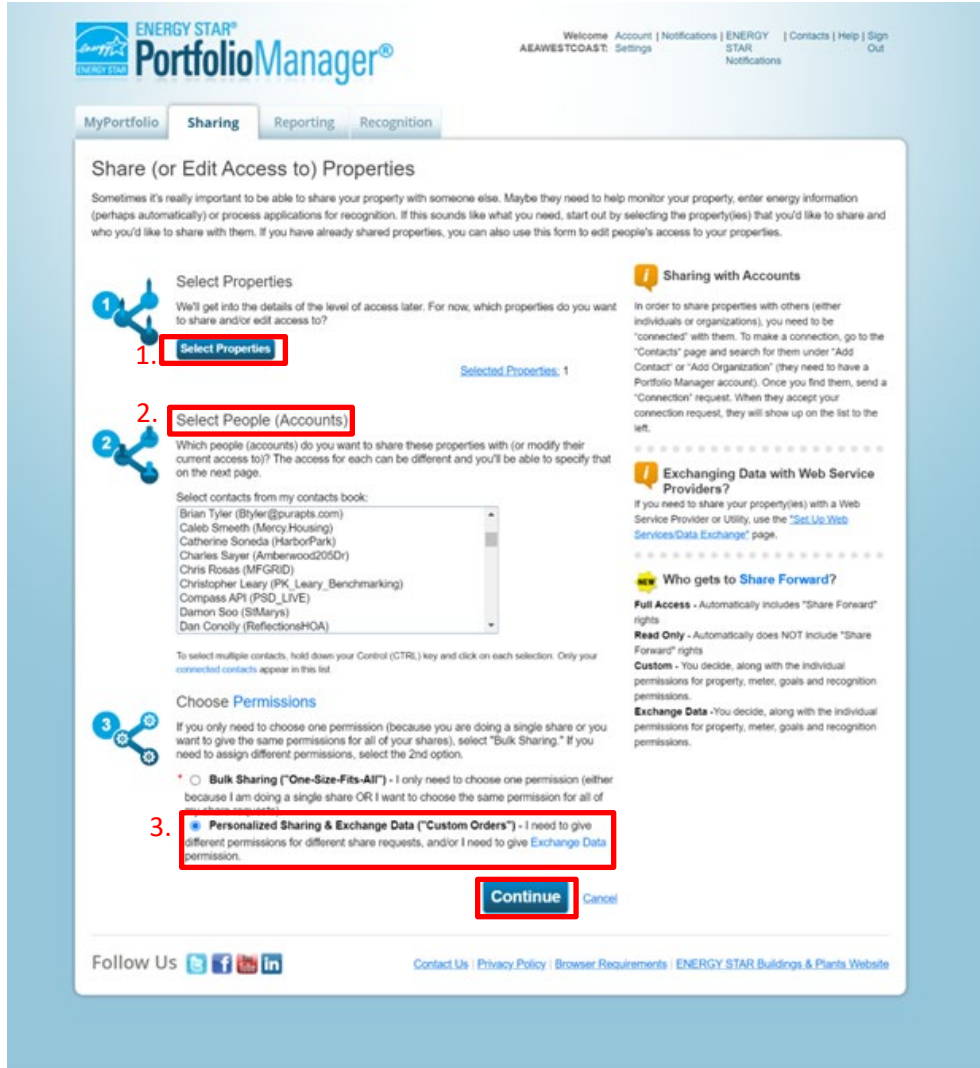
Sharing this Property

2 People Have Access to this Property

Name	Permissions	Action
Pacific Gas and Electric Company (PACIFICGASELECTRIC)	Exchange Data Shared by Tab Harrison	I want to...
Tab Harrison (AEAWEWESTCOAST)	Property Data Administrator	I want to...

[Copy Property](#) | [Transfer Ownership](#) | [Download Property to Excel](#)

5. Step one, "Select Properties," check to see that you selected the correct property.
- Step two, "Select People (Accounts)," select "Tab Harrison (AEAWESTCOAST)".
- Step three, "Choose Permissions," click on "Personalized Sharing & Exchange Data ("Custom Orders")" and click Continue.



Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out
AEAWESTCOAST: Settings Notifications

MyPortfolio **Sharing** Reporting Recognition

Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.

1. Select Properties

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

1. Select Properties

Selected Properties: 1

2. Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

- Brian Tyler (Btyler@purapts.com)
- Caleb Smeeth (Mercy.Housing)
- Catherine Soneda (HarborPark)
- Charles Sayer (Antberwood200Dr)
- Chris Rossas (MFGGRID)
- Christopher Leary (PK_Leary_Benchmarking)
- Compass API (PSD_LIVE)
- Damon Soo (SiMays)
- Dan Conolly (ReflectionsHOA)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.

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, 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 shares).

3. 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.

Continue Cancel

Sharing with Accounts

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Contacts" page and search for them under "Add Contact" or "Add Organization" (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. When they accept your connection request, they will show up on the list to the left.

Exchanging Data with Web Service Providers?

If you need to share your property(ies) with a Web Service Provider or Utility, use the "Set Up Web Services/Data Exchange" page.


Who gets to Share Forward?

Full Access - Automatically includes "Share Forward" rights

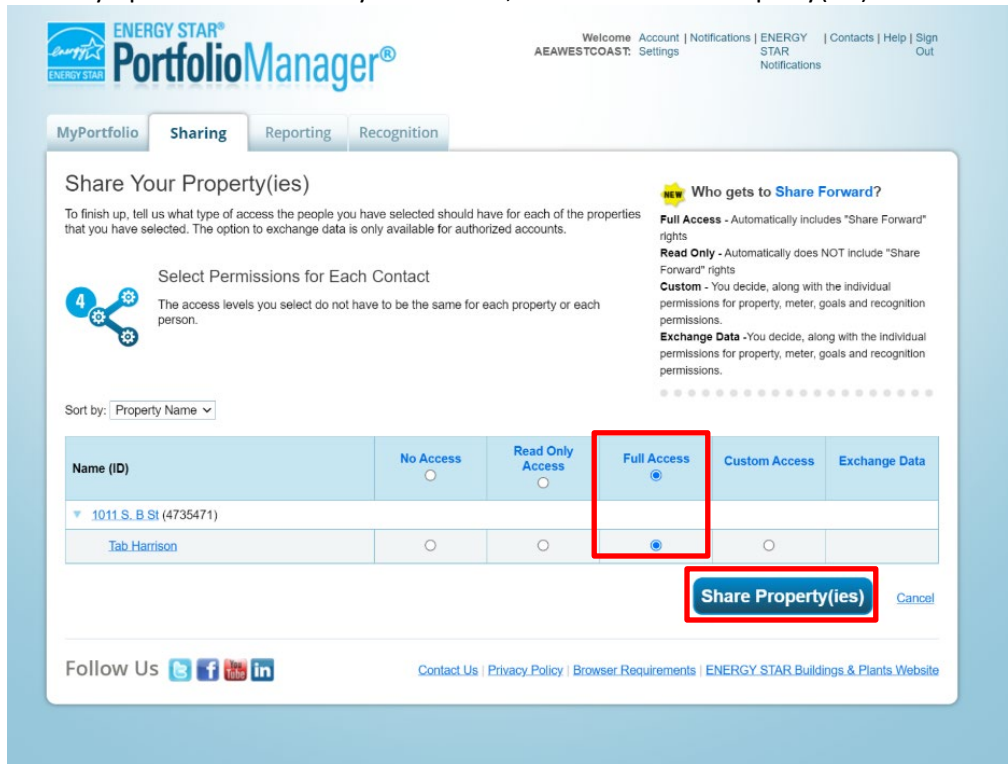
Read Only - Automatically does NOT include "Share Forward" rights

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.

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6. This will bring you to the next page. Be sure to click “Full Access,” which will give us full access to the monthly uploaded data from your utilities, then click Share Property(ies).



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: Property Name

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
1011 S. B St (4735471)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tab Harrison	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Share Property(ies) Cancel

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7. Once we have accepted the property share request, you will be able to see that it was successfully shared when you click in the property on the summary page, and you are done!