



In the Community to Serve[®]

Portfolio Manager How-To Guide for Customers

2 I need to Benchmark, Now What?

Sharing Properties!

1. Once connected, you'll need to share permissions with Cascade.
2. Under the **Sharing** Tab select the **SHARE WITH YOUR UTILITY or SERVICE PROVIDER FOR EXCHANGING DATA**

The screenshot shows the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo and the text "ENERGY STAR® PortfolioManager®". To the right, there is a navigation menu with links: "Welcome Account | Notifications | ENERGY STAR Notifications | CascadeNaturalGas: Settings | Contacts | Help | Sign Out". Below the header are four tabs: "MyPortfolio", "Sharing", "Reporting", and "Recognition". The "Sharing" tab is selected and highlighted with a yellow arrow. The main content area is divided into two columns. The left column is titled "My Shared Properties (0)" and contains three blue buttons: "Share (or Edit Access to) a Property", "Share with your Utility or Service Provider for exchanging data", and "Download Sharing Report". A yellow arrow labeled "CLICK" points to the second button. The right column is titled "Sharing Notifications (0)" and contains the text "You have no new notifications." Below this is a section titled "More About Sharing" with an information icon. The text in this section reads: "No properties are currently shared between you and [your contacts](#). Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)" At the bottom of the page, there are social media icons for Twitter, Facebook, YouTube, and LinkedIn, followed by the text "Follow Us". To the right of these icons are links for "Contact Us", "Privacy Policy", "Browser Requirements", and "ENERGY STAR Buildings & Plants Website".

2 I need to Benchmark, Sharing Properties

1. Select **Cascade Natural Gas (CascadeNaturalGas Benchmarking)** from the Web Services Provider Account in Step 1
2. Next Select *Multiple Properties* if you have non gas properties in your portfolio.
 1. If you only have one property or all of your properties have gas accounts, you can select ONE or ALL from the dropdown menu
3. Click **Select Properties** to access a pop up of available properties

MyPortfolio **Sharing** Reporting Recognition

Share Properties for Exchanging Data

Choose Permissions Set Up Connections Check Existing Permissions View Results/ Confirmation

Sometimes it's really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

1  **Select Web Services Provider (Account)**
Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.
Select web services provider from my contacts book:
Cascade Natural Gas (CascadeNatural) ▼

2  **Select Properties**
Which Properties do you want to share? Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.
Multiple Properties ▼ **Select Properties**
 [Selected Properties: 0](#)

 Unlike "regular sharing," when you "bulk share" with a Web Service Provider, you can only pick one provider. This is because the bulk share depends on the requirements/settings of the provider.

2 I need to Benchmark, Sharing Properties

1. Select only the properties with gas accounts that you would like usage data
2. If you only have one property or all of your properties have gas, you can select ONE or ALL
3. Click **Apply Selection**

Select Properties

Search:

<input type="checkbox"/>	Name	Property Type	State/Province
<input checked="" type="checkbox"/>	Sample CNG Building	Mixed Use Property	WA
<input type="checkbox"/>	TEST Kristin Forck	Mixed Use Property	WA

Filter Properties (2)

Filter by Property Type

Mixed Use Property (2)

Filter by Construction Status

Test (2)

Filter by State/Province

Washington (2)

Filter by Shared from

None - My Properties (PDA) (2)

First Previous Page 1 of 1 Next Last 100 ▼

Selected Properties:1 ([View Selection](#))

Apply Selection [Cancel](#)

2 I need to Benchmark, Sharing Properties

1. Step 3: Choose Permissions should be **BULK SHARING**
2. Then **Exchange Data Custom Access** to access the pop up screen



Select Properties

Which Properties do you want to share? **Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.**

Multiple Properties



Select Properties

[Selected Properties: 0](#)



Choose Permissions

If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.
 - Exchange Data Full Access (with full access to all properties and meters)
 - Exchange Data Read Only Access (with read only access to all properties and meters)
 - Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)
 - Remove Access (i.e. remove existing access to all properties)
- Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

Authorize Exchange

[Cancel](#)

2 I need to Benchmark, Sharing Properties

1. The **Exchange Data Custom Access** will direct to the **SELECT CUSTOM ACCESS PERMISSIONS** pop up
2. For **PROPERTY INFORMATION**, select **Exchange Data Full Access**, then **Natural Gas** under **ENERGY METERS**
 1. If the building only offers the option for **Energy Meters** rather than selecting the type, please grant **Exchange Data Full Access**
3. Cascade does not need the option to **Share Forward**
4. Then **Apply Selection**

Share Properties for Exchanging Data

Choose Permissions | Set Up Connections | Check Existing | View Results/ Confirmation

Sometimes it's r provider.

Select Custom Access Permissions for **Cascade Natural Gas**

Select the permission level below that you would like to grant **Cascade Natural Gas** for each category.

Item	None	Exchange Data Read Only	Exchange Data Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ All Meter Information			
▼ Energy Meters			
⊘ Electric - Grid	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
⊘ Water Meters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
⊘ Waste Meters	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Goals, Improvements & ...			

⊘ The provider with whom you are sharing does not support this meter type.

Additional Options:

Item	Yes	No
* Share Forward Allow Cascade Natural Gas to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

⊘ Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)

About Permissions
Select permissions for each category. You must provide Read Only or Full Access to the Property Information to share a property.

Property Information
Includes access to everything on Summary, Details, and Design tabs and all metrics for this property through the Reporting tab, even if you choose None for some of the other options.

- If you want someone to add & delete meters, you need to choose "Full Access" for Property Information

All Meter Information
Includes access to the Meters tab.

- None – suppresses access to the Meters tab, so the person can't see your individual meters & bill entries. But annual metrics (based on the sum of these bills) are still accessible via Reporting.
- Read Only – provides access to view meter entries, but not make any edits.
- Full Access – provides the

Apply Selection Cancel

2 I need to Benchmark, Sharing Properties

1. Once selections are chosen, it will redirect back to the previous page
2. Next **Authorize Exchange**



Choose Permissions

If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.
 - Exchange Data Full Access (with full access to all properties and meters)
 - Exchange Data Read Only Access (with read only access to all properties and meters)
 - Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties) [Edit](#)
 - Remove Access (i.e. remove existing access to all properties)
- Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.



Authorize Exchange

[Cancel](#)

2 I need to Benchmark, Sharing Properties

1. If data has been previously entered, Portfolio Manager will double check that possible overwriting to Share for data automation is okay.
2. Here you can go back and edit if necessary.
3. You can reach out to Cascade staff at EnergyReporting@cngc.com with questions.

MyPortfolio
Sharing
Reporting
Recognition

Bulk Share Properties for Exchanging Data: Review of Existing Permissions

Choose Permissions
Set Up Connections
Check Existing Permissions
View Results/ Confirmation

Issues were found with the selections you made. If you select "Continue", the following will occur:

2 share requests will overwrite existing permissions. Please review the list and confirm or cancel the shares in the table below.

A total of 2 share requests will be sent if you continue. If this is not what you wish to do, select "Cancel" to go back and modify your selections.

Confirm or Cancel Shares for Each Property (2):

Property Name	Your Permissions	Cascade Natural Gas's permissions		Continue with Share and Overwrite	Cancel Share
		Existing	Proposed		
Sample CNG Building	Full Access	Exchange Data	Exchange Data - Custom	<input checked="" type="radio"/>	<input type="radio"/>

Need Help? Email: EnergyReporting@cngc.com Call: 360-788-2349

12

2 I need to Benchmark, Sharing Properties

1. After **Authorize Exchange** or **Continue with Share** a Confirmation Notice will pop up that your Bulk Share Properties for Exchanging Data was sent to Cascade Natural Gas.

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top left is the ENERGY STAR logo and the text "ENERGY STAR® PortfolioManager®". At the top right, there is a navigation menu: "Welcome CNGCEE: Account Settings | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out". Below the logo is a navigation bar with tabs: "MyPortfolio", "Sharing" (selected), "Reporting", and "Recognition". The main content area is titled "Bulk Share Properties for Exchanging Data: Results". Below the title is a progress bar with four steps: "Choose Permissions", "Set Up Connections", "Check Existing Permissions", and "View Results/ Confirmation". The "View Results/ Confirmation" step is highlighted in blue. Below the progress bar is a green confirmation box with a checkmark icon and the text: "Congratulations! You have successfully shared/edited access to your property(ies). A total of 2 share requests were sent. If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required." A "Close" button is located at the bottom right of the confirmation box. At the bottom of the page, there is a "Follow Us" section with social media icons for Twitter, Facebook, YouTube, and LinkedIn. To the right of the social media icons are links for "Contact Us", "Privacy Policy", "Browser Requirements", and "ENERGY STAR Buildings & Plants Website".