CASCADE NATURAL GAS CORPORATION

A Subsidiary of MDU Resources Group, Inc.

In the Community to Serve®

Portfolio Manager How-To Guide for Customers

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

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 ⌄]

ℹ️ 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 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**

CLICK

Selected Properties: 0

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: [_____]

	Name ▲	Property Type ⬍	State/Province⬍
☑	Sample CNG Building	Mixed Use Property	WA
☐	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)

CLICK

Apply Selection Cancel

permissions

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8

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

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9

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

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10

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.

CLICK

Authorize Exchange Cancel

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	⦿	○

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.