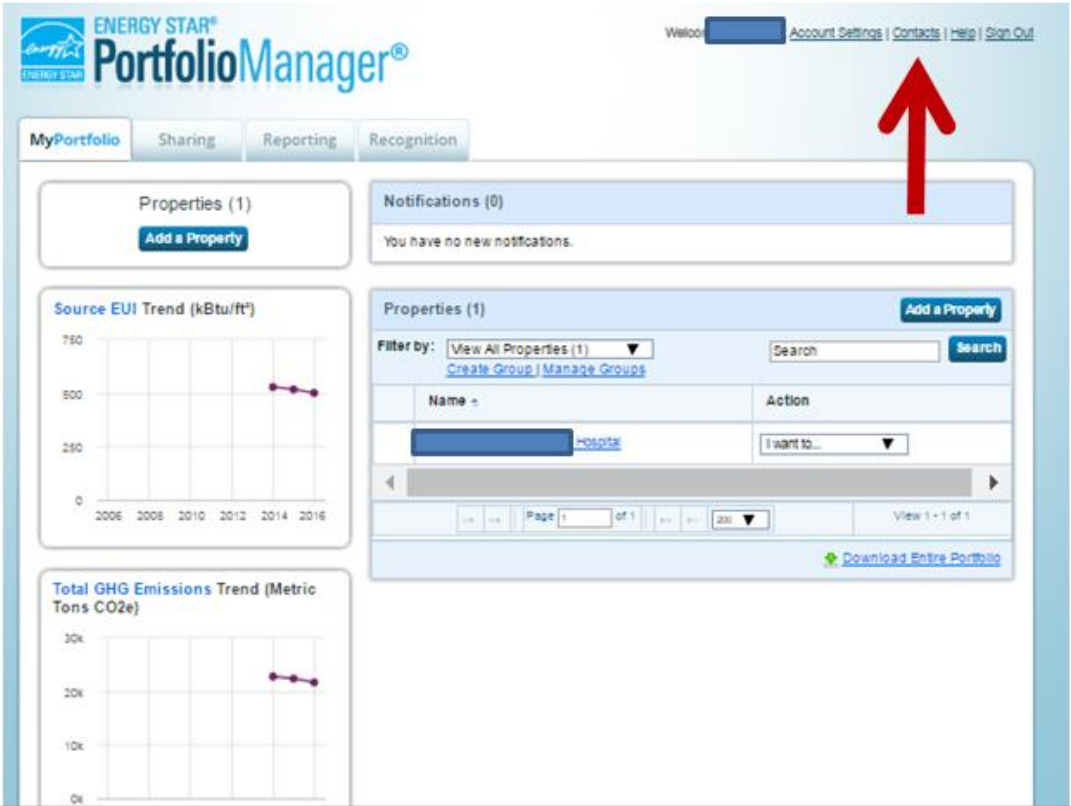


Compete in the 2017 KSHE Energy Derby

To sign up, contestants will need to share their Portfolio Manager account with KSHE. Follow these steps to share your account!

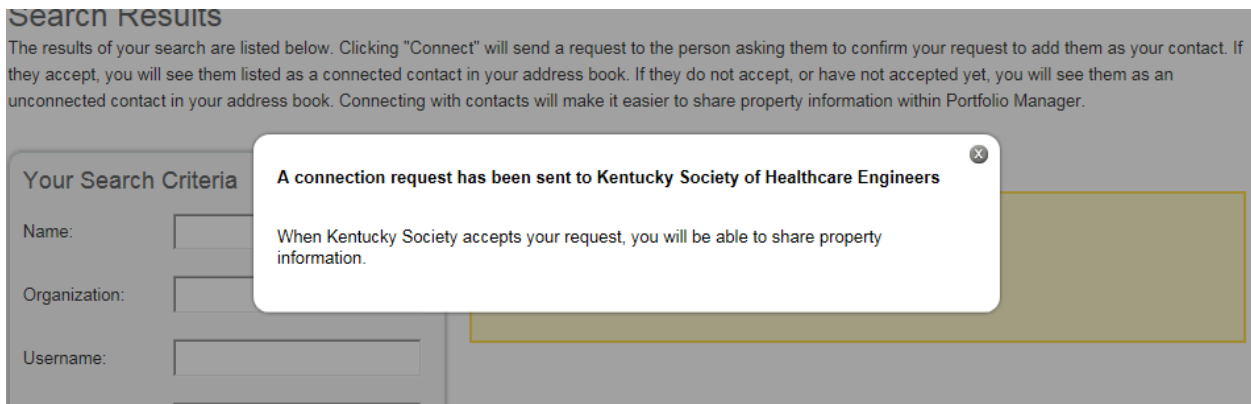
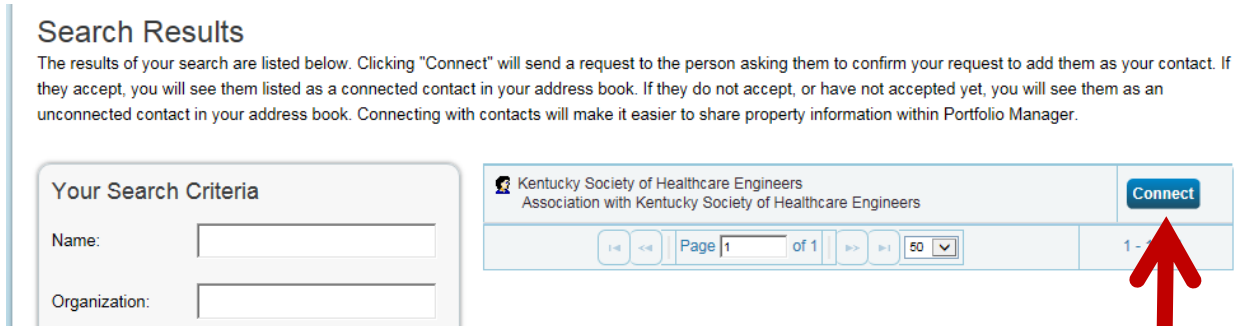
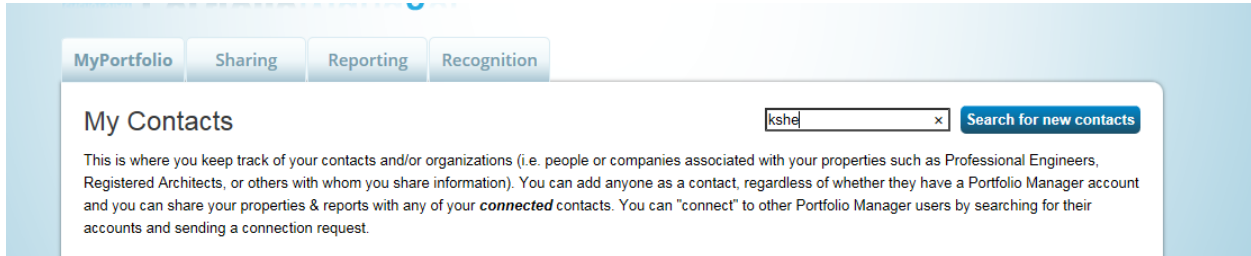
Sharing your Portfolio Manager account with KSHE

Step 1: Go to the “**Contacts**” link in upper right-hand corner from your landing page in Portfolio Manager.



The screenshot shows the ENERGY STAR Portfolio Manager interface. In the top right corner, there is a navigation bar with the following links: [Account Settings](#), [Contacts](#), [Help](#), and [Sign Out](#). A red arrow points to the [Contacts](#) link. Below the navigation bar, there are several sections: "MyPortfolio" with sub-tabs for "Sharing", "Reporting", and "Recognition"; "Properties (1)" with an "Add a Property" button; "Notifications (0)" with the message "You have no new notifications."; "Source EUI Trend (kBtu/ft²)" with a line graph showing data from 2006 to 2016; "Total GHG Emissions Trend (Metric Tons CO2e)" with a line graph showing data from 2006 to 2016; and a "Properties (1)" table with a search bar, filter dropdown, and table columns for "Name" and "Action". The table contains one entry with a redacted name and an "I want to..." dropdown. At the bottom of the table, there is a "Download Entire Portfolio" link.

Step 2: Type in “Kentucky Society of Healthcare Engineers” in the Search engine. Portfolio Manager will retrieve this name and give you the ability to connect. Hit the “Connect” button next to the name and Portfolio Manager will send a connection request to KSHE.



KSHE must accept the request before you can share into the KSHE account. You can see the status of your connection requests from the “Sharing” tab.

Step 3: Portfolio Manager will notify you when KSHE accepts your connection request. Once you are connected, click the button “Share a (or Edit Access to) Property”

A connection request has been sent to Kentucky Society of Healthcare Engineers.

When Kentucky Society accepts your request, you will be able to share property information.

My Shared Properties
(0)

Share (or Edit Access to)
a Property

Set Up Web Services/
Data Exchange

Download Sharing Report

Sharing Notifications (0)


You have no new notifications.

Step 4: Select properties to enroll in the KSHE Energy Derby. Find Kentucky Society of Healthcare Engineers from your contacts book. Choose "Personalized Sharing & Exchange Data". Click "Continue".

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?

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.


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 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).
- 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.

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 "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

Exchanging Data
To get started, first connect with an organization that exchanges data. Once you are connected, their name will appear on the selection list on the left. Note: you can now share in bulk for exchanging data.

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.

Continue [Cancel](#)

Step 5: Change the default “read only access” to the new “Custom Access”.

ENERGY STAR® PortfolioManager® Welcome CREED5: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio **Sharing** Planning Reporting Recognition

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.

4 **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:

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
<input type="checkbox"/> Hospital (1025346)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input checked="" type="checkbox"/> Kentucky Society of Healthcare Engineers	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

NEW **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.

Some of your contacts already have access to the properties you selected. When you select "Share Property(ies)" their access levels will be changed. No acceptance is required.

Share Property(ies) [Cancel](#)

Step 6: Select "Read Only Access" for Property Information and All Meter Information. Select "None" for "Recognition" and "Goals, Improvements and Checklists". Select "Yes" for Share Forward*. Then click "Apply Selection".

Select Custom Access Permissions to [redacted] Hospital for [redacted] Kentucky Association of Healthcare Engineers

Please select the permission level you would like to grant [redacted] hospital for each category. If "None" is selected for all items, [redacted] will not receive any access to this property.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
▼ All Meter Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
electric	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Gas	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Computer Center -- IT Energy Apply Estimates	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Outdoor	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Main	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

About Permissions
You can select, create, read, update or delete permissions for each category of information about your property. Providing these levels of access differs based on the category you select.

Property Information
Includes access to the "My Property" page, as well as access to the information about how the property is used.

All Meter Information
Includes the ability to add, delete, and edit meter (bill) data, but not add NEW meters (or delete meters, edit information about meters, or change the associations for the meters). If you want someone to be able to add & delete meters, you must choose "Full Access" for Property Information.

Recognition
Includes access to let you apply for certification for that property (and view the application history).

Goals, Improvements, & Checklists

Additional Options:

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

Apply Selection [Cancel](#)

Step 7: Confirm that Kentucky Society of Healthcare Engineers has “Custom Access”. Click “Share Property(ies)”. You’re done!

ENERGY STAR® PortfolioManager®

Welcome CREED5: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio **Sharing** Planning Reporting Recognition

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.

4 **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)	None	Read Only Access	Full Access	Custom Access	Exchange Data
Hospital (1025346)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Kentucky Society of Healthcare Engineers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/> Edit	<input type="radio"/>

NEW 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.

! Some of your contacts already have access to the properties you selected. When you select "Share Property(ies)" their access levels will be changed. No acceptance is required.

Share Property(ies) [Cancel](#)