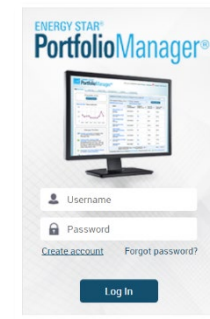


Share Forward Instructions for PSE MyData Migration to Energy CAP

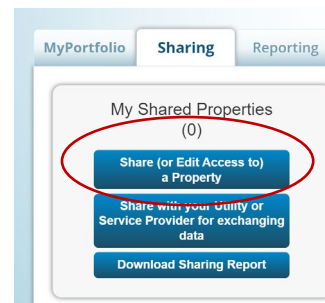
For account holders with only one building reporting to City of Seattle

Follow the steps below to update permission settings if you benchmark a single building for City of Seattle Annual Reporting, and are enrolled in PSE MyData for reporting of natural gas. If you have multiple properties in your portfolio for City of Seattle Annual Reporting, see the instructions on page 5.

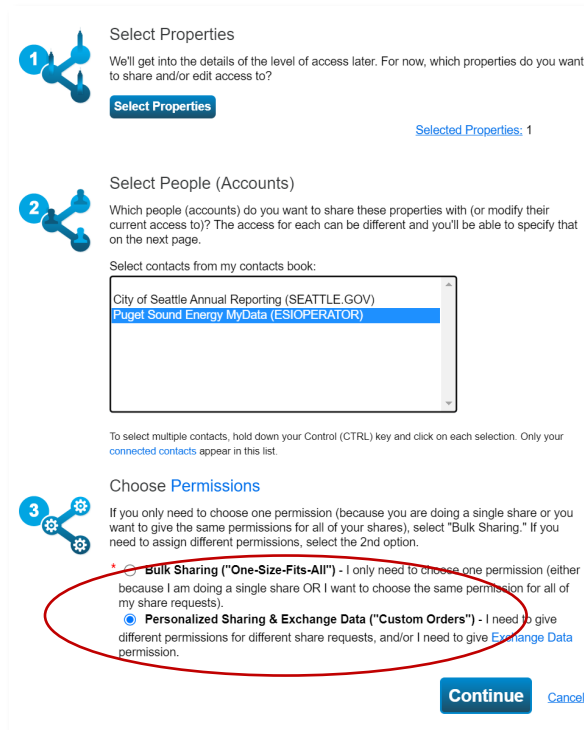
1. **Log in** to your Portfolio Manager account: www.energystar.gov/benchmark



2. Select the **Sharing** tab, then click on the “**Share (or Edit Access to) a Property**” button within the “**My Shared Properties**” box.



3. Scroll down to the **"Choose Permissions"** section and ensure the **"Personalized Sharing & Exchange Data"** button is selected. Once selected, click the **Continue** button.

The screenshot shows a three-step process. Step 1, 'Select Properties', is completed. Step 2, 'Select People (Accounts)', shows a list of contacts with 'Puget Sound Energy MyData (ESIOperator)' selected. Step 3, 'Choose Permissions', is the current step. It contains two radio button options. The first option, 'Bulk Sharing ("One-Size-Fits-All")', is unselected. The second option, 'Personalized Sharing & Exchange Data ("Custom Orders")', is selected and circled in red. Below the options is a 'Continue' button and a 'Cancel' link.

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?

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:

City of Seattle Annual Reporting (SEATTLE.GOV)

Puget Sound Energy MyData (ESIOperator)

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

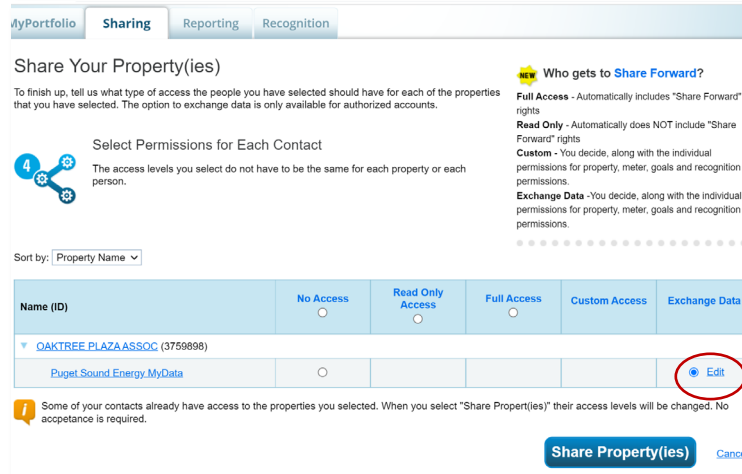
If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions, select the 2nd option.

* ☐ 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 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.

Continue Cancel

- On the next screen, select the **“Exchange Data”** button then select **“Edit,”** which opens the **Access Permissions** window.



MyPortfolio | **Sharing** | 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.

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 |
|---------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|--|
| ▼ OAKTREE PLAZA ASSOC (3759898) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Puget Sound Energy MyData | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> Edit |

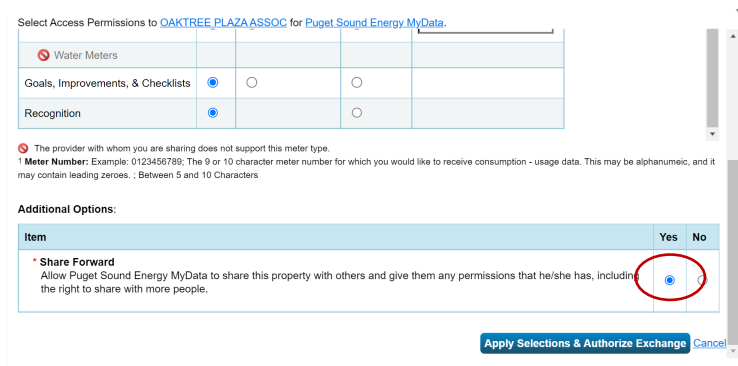
Who gets to Share Forward?

- 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

- Scroll down to the **“Additional Options”** section at the bottom of the window and select **“Yes”** within the **Share Forward** box.



Select Access Permissions to OAKTREE PLAZA ASSOC for Puget Sound Energy MyData.

| Item | Yes | No |
|-----------------------------------|----------------------------------|-----------------------|
| Water Meters | <input checked="" type="radio"/> | <input type="radio"/> |
| Goals, Improvements, & Checklists | <input type="radio"/> | <input type="radio"/> |
| Recognition | <input type="radio"/> | <input type="radio"/> |

Additional Options:

| Item | Yes | No |
|--|----------------------------------|-----------------------|
| Share Forward Allow Puget Sound Energy MyData 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 Selections & Authorize Exchange Cancel

6. Finally, click the **“Apply Selections & Authorize Exchange”** button. This will open the **“Share Your Property(ies)”** window. Click on the **“Share Property(ies)”** button and you’re done. This completes the Share Forward process.

MyPortfolio
Sharing
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) | No Access | Read Only Access | Full Access | Custom Access | Exchange Data |
|--|-----------------------|-----------------------|-----------------------|-----------------------|---------------------------------------|
| <div> OAKTREE PLAZA ASSOC (3759898) </div> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Puget Sound Energy MyData | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> Edit |

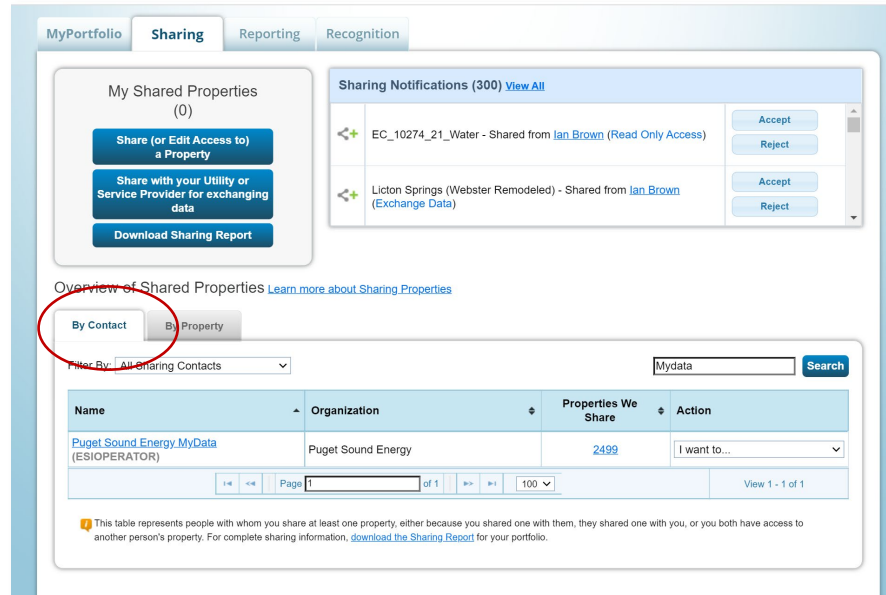
i

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

For account holders of large portfolios and multiple buildings reporting to City of Seattle

1. From the sharing tab, instead of going to a property, you would stay on the **Contact** tab and find **PSE**.



My Shared Properties (0)

Share (or Edit Access to) a Property

Share with your Utility or Service Provider for exchanging data

Download Sharing Report

Sharing Notifications (300) [View All](#)

| | | |
|--|--------|--------|
| EC_10274_21_Water - Shared from Ian Brown (Read Only Access) | Accept | Reject |
| Linton Springs (Webster Remodeled) - Shared from Ian Brown (Exchange Data) | Accept | Reject |

Overview of Shared Properties [Learn more about Sharing Properties](#)

By Contact By Property

Filter By: All Sharing Contacts

Mydata [Search](#)

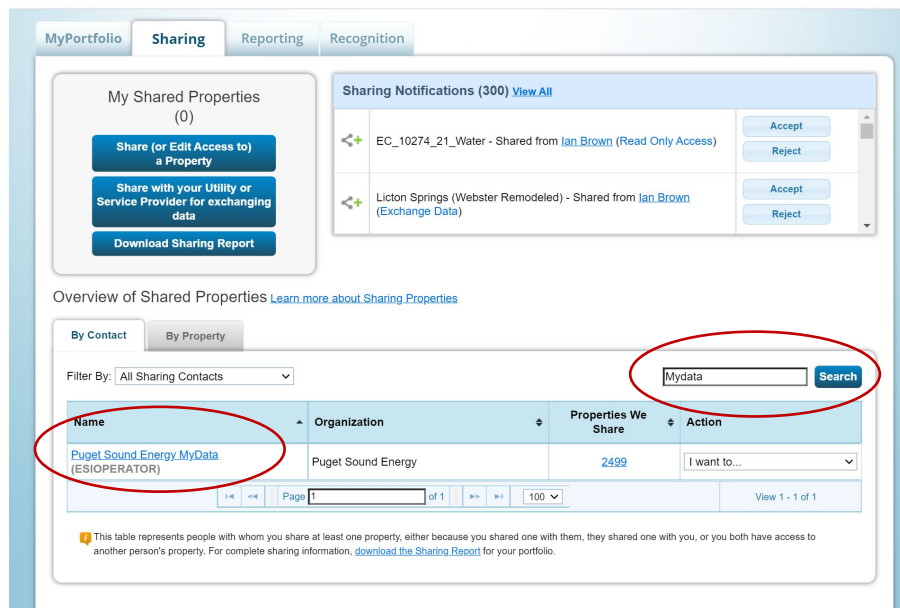
| Name | Organization | Properties We Share | Action |
|---|--------------------|---------------------|--------------|
| Puget Sound Energy MyData (ESIOperator) | Puget Sound Energy | 2499 | I want to... |

Page 1 of 1

View 1 - 1 of 1

ⓘ This table represents people with whom you share at least one property, either because you shared one with them, they shared one with you, or you both have access to another person's property. For complete sharing information, [download the Sharing Report](#) for your portfolio.

2. Search for **Puget Sound Energy MyData (ESIOPERATOR)**.



MyPortfolio **Sharing** Reporting Recognition

My Shared Properties (0)

Share (or Edit Access to) a Property

Share with your Utility or Service Provider for exchanging data

Download Sharing Report

Sharing Notifications (300) [View All](#)

EC_10274_21_Water - Shared from [Jan Brown](#) (Read Only Access)

Accept Reject

Lifton Springs (Webster Remodeled) - Shared from [Jan Brown](#) (Exchange Data)

Accept Reject

Overview of Shared Properties [Learn more about Sharing Properties](#)

By Contact By Property

Filter By: All Sharing Contacts

Mydata Search

| Name | Organization | Properties We Share | Action |
|---|--------------------|---------------------|--------------|
| Puget Sound Energy MyData (ESIOPERATOR) | Puget Sound Energy | 2499 | I want to... |

Page 1 of 1

This table represents people with whom you share at least one property, either because you shared one with them, they shared one with you, or you both have access to another person's property. For complete sharing information, [download the Sharing Report](#) for your portfolio.

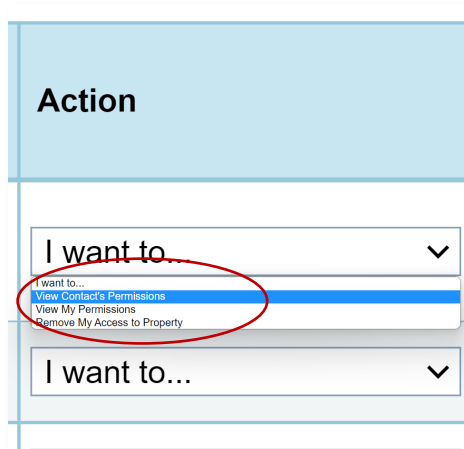
3. Click on **“Properties We Share”** link.

| Name | Organization | Properties We Share | Action |
|---|--------------------|---------------------|--------------|
| Puget Sound Energy MyData (ESIOPERATOR) | Puget Sound Energy | 2499 | I want to... |

4. You should see the **following header** pop up:

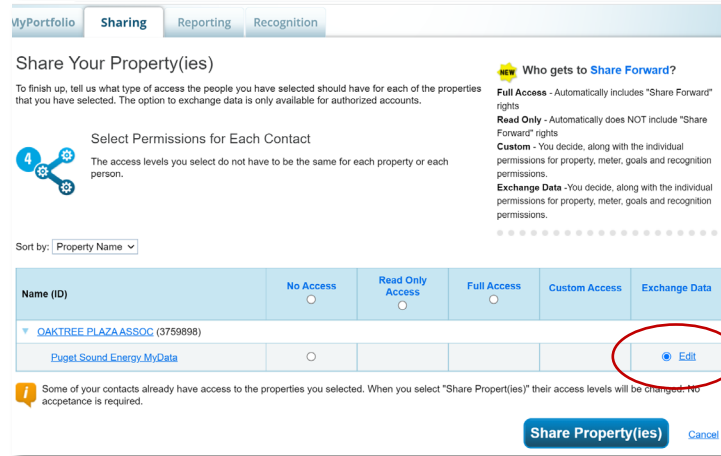
Properties Puget Sound Energy and I Both have Access to

5. From the **Properties**, you then select from the **Action drop-down**, I want to...**View Contacts Permissions**



The screenshot shows a light blue header box labeled "Action". Below it is a dropdown menu with the text "I want to..." and a downward arrow. The dropdown is open, showing three options: "View Contact's Permissions" (highlighted in blue), "View My Permissions", and "Remove My Access to Property". A red circle is drawn around the "View Contact's Permissions" option. Below the dropdown is another dropdown menu with the text "I want to..." and a downward arrow.

6. Click on **Edit Share Permissions**.



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.

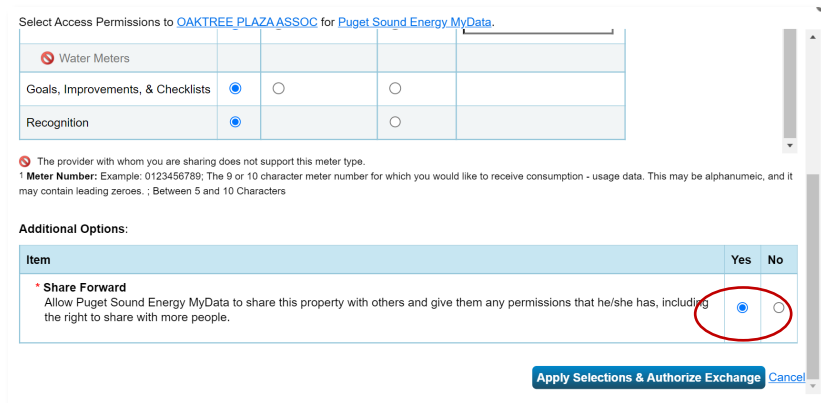
Sort by: Property Name

| Name (ID) | No Access | Read Only Access | Full Access | Custom Access | Exchange Data |
|---------------------------------|-----------------------|-----------------------|-----------------------|-----------------------|--|
| ▼ OAKTREE PLAZA ASSOC (3759898) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Puget Sound Energy MyData | <input type="radio"/> | | | | <input checked="" type="radio"/> Edit |

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](#)

7. Use the outside bar to scroll down to **Additional options, Share Forward**, then select **Yes**. Once selected, click **Apply Selections and Authorize Exchange**, then **Save Changes**.



Select Access Permissions to OAKTREE PLAZA ASSOC for Puget Sound Energy MyData.

| | | | |
|-----------------------------------|----------------------------------|-----------------------|-----------------------|
| Water Meters | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Goals, Improvements, & Checklists | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Recognition | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

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

¹ **Meter Number:** Example: 0123456789; The 9 or 10 character meter number for which you would like to receive consumption - usage data. This may be alphanumeric, and it may contain leading zeroes. ; Between 5 and 10 Characters

Additional Options:

| Item | Yes | No |
|--|----------------------------------|-----------------------|
| * Share Forward Allow Puget Sound Energy MyData 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 Selections & Authorize Exchange [Cancel](#)