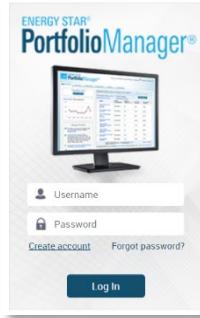


Share Forward Instructions for PSE MyData Migration to Energy CAP

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

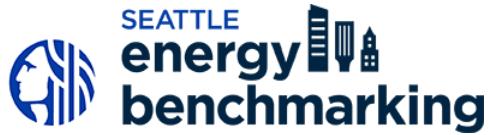
Follow the steps below to update permission settings if you benchmark a single building for City of Seattle Annual Reporting, and are enrolled in PSE MyData for reporting of natural gas. If you have multiple properties in your portfolio for City of Seattle Annual Reporting, see the instructions on page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

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

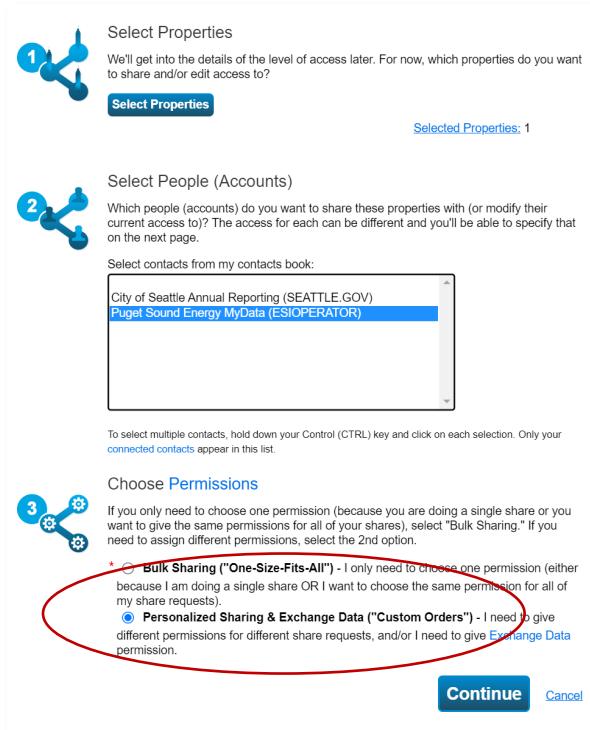


2. Select the **Sharing** tab, then click on the **“Share (or Edit Access to) a Property”** button within the **“My Shared Properties”** box.





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





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

A screenshot of the "Access Permissions" window. At the top, there are tabs for "MyPortfolio", "Sharing" (which is selected), "Reporting", and "Recognition". The main title is "Share Your Property(ies)". Below it, a sub-section titled "Select Permissions for Each Contact" shows a gear icon with the number 4. A note says: "The access levels you select do not have to be the same for each property or each person." To the right, a "Who gets to Share Forward?" section defines "Full Access", "Read Only", "Custom", and "Exchange Data". A table lists properties with checkboxes for these permissions. The "Exchange Data" column for "Puget Sound Energy MyData" has a radio button selected and is circled in red. A note at the bottom says: "Some of your contacts already have access to the properties you selected. When you select "Share Prop(ies)" their access levels will be changed. No acceptance is required." At the bottom right are "Share Property(ies)" and "Cancel" buttons.

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

A screenshot of the "Additional Options" window. It shows a table for selecting access permissions for "OAKTREE PLAZA ASSOC" for "Puget Sound Energy MyData". The table has columns for "Water Meters", "Goals, Improvements, & Checklists", and "Recognition", each with radio buttons. Below the table, a note says: "The provider with whom you are sharing does not support this meter type." Another note says: "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." At the bottom, there is an "Additional Options:" section with a table. The first row has columns for "Item", "Yes", and "No". The second row, labeled "Share Forward", has a note: "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." The "Yes" radio button in this row is circled in red. At the bottom right are "Apply Selections & Authorize Exchange" and "Cancel" buttons.

- 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.

Select Permissions for Each Contact

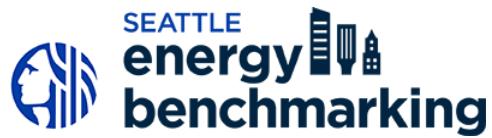
The access levels you select do not have to be the same for each property or each person.

Sort by:

Name (ID)	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 checked="" type="radio"/> Edit
Puget Sound Energy MyData	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<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



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.

The screenshot shows the "Sharing" tab of the Seattle Energy Benchmarking interface. The top navigation bar includes "MyPortfolio", "Sharing" (which is active and highlighted in blue), "Reporting", and "Recognition".

The main content area is divided into two main sections:

- My Shared Properties (0)**: Contains buttons for "Share (or Edit Access to) a Property", "Share with your Utility or Service Provider for exchanging data", and "Download Sharing Report".
- Sharing Notifications (300) [View All](#)**: A table showing notifications with columns for "Sharing Contact" (with icons), "Details", and "Actions" (Accept or Reject). Two notifications are listed:
 - EC_10274_21_Water - Shared from [ian.Brown](#) (Read Only Access)
 - Licton Springs (Webster Remodeled) - Shared from [ian.Brown](#) (Exchange Data)

Below these sections is a table titled "Overview of Shared Properties" with a "Learn more about Sharing Properties" link. The table has two tabs: "By Contact" (which is selected and highlighted in red) and "By Property".

The table includes the following columns: Name, Organization, Properties We Share, and Action. One row is shown for "Puget Sound Energy MyData (ESIOPERATOR)", which is associated with "Puget Sound Energy" and "2499" properties. The "Action" column contains a dropdown menu with "I want to..." and a "Search" button.

At the bottom of the table, there is a note: "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." There is also a page navigation bar with "Page 1 of 1" and a "View 1 - 1 of 1" link.



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

A screenshot of the Seattle Energy Benchmarking web interface. The top navigation bar includes tabs for "MyPortfolio", "Sharing" (which is selected and highlighted in blue), "Reporting", and "Recognition".

The main content area is divided into two sections:

- My Shared Properties (0)**: Contains buttons for "Share (or Edit Access to) a Property", "Share with your Utility or Service Provider for exchanging data", and "Download Sharing Report".
- Sharing Notifications (300) [View All](#)**: A list of notifications with "Accept" and "Reject" buttons. Two notifications are visible:
 - EC_10274_21_Water - Shared from [ian.Brown](#) (Read Only Access)
 - Licton Springs (Webster Remodeled) - Shared from [ian.Brown](#) (Exchange Data)

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

Filter By: All Sharing Contacts [Search](#)

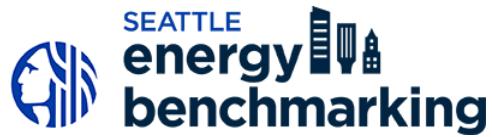
Name	Organization	Properties We Share	Action
Puget Sound Energy MyData (ESIOPERATOR)	Puget Sound Energy	2499	I want to...

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.

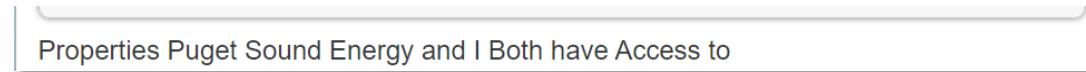
3. Click on “Properties We Share” link.

A zoomed-in view of the "Properties We Share" table from the previous screenshot. The table has columns for "Name", "Organization", "Properties We Share", and "Action".

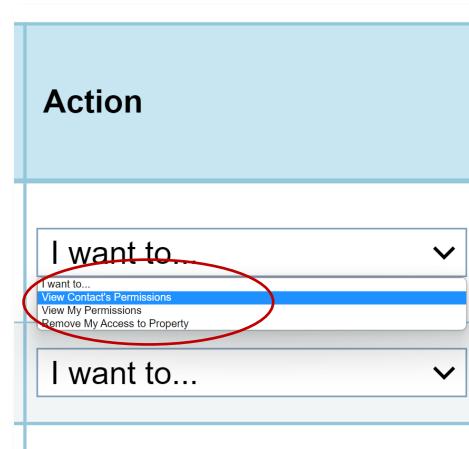
Name	Organization	Properties We Share	Action
Puget Sound Energy MyData (ESIOPERATOR)	Puget Sound Energy	2499	I want to...



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



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





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 checked="" type="radio"/> Edit
Puget Sound Energy MyData	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/> Edit

Some of your contacts already have access to the properties you selected. When you select "Share Prop(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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Goals, Improvements, & Checklists	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recognition	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

✖ 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	<input checked="" type="radio"/>	<input type="radio"/>

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.

Apply Selections & Authorize Exchange **Cancel**