

Instructions for sharing your facility with BOMA Austin

Log into Portfolio Manager use your username and password-

Under the header “Working with Facilities” click on **Share Facilities-**

Step 1-

Select User or Master Account

Users with whom you share facilities will now be able to see your name and e-mail address on their Facility Summary page for that shared facility. In addition, users will also have the option to select your name and email address to appear in their custom views. Select Cancel if you do not wish to share any facilities.

Portfolio Manager provides the ability to share multiple facilities from your account with other users of the system in a single transaction. Users with whom access is being shared or removed MUST have a Portfolio Manager user account. To share facilities, select a Portfolio Manger user in Step 1.

If you are only removing access to facilities in your account, select "Remove this User's Access" in Step 1 after selecting a user from the Current Access List or enter a username in the textbox. You will then be able to select all of the facilities from which you want to remove this user's access.

STEP 1: Select the account to which you want to grant access, modify existing access or remove access rights.

Portfolio Manager User:

User from my current access list:

- OR -

Enter Portfolio Manager Username:

- OR -

Select a Portfolio Manager Master Account:

[Learn more about Master Accounts](#)

- OR -

Energy Service Provider: [Learn more about Energy Service Provider](#)

ADD AND MODIFY **DELETE** **CANCEL**

Step 2 select the read only tab, under options select “Yes” for Baseline and “No” for all others.

STEP 2: Select the set of Access Rights you want to provide this User.	
Access Role	Access Rights
<input type="checkbox"/> Facility/Profile Editor	(1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; (4) Create/Edit a Building Profile
<input type="checkbox"/> Facility Editor	1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; May NOT create/edit a Building Profile
<input type="checkbox"/> Profile Editor	1) Create/Edit a Building Profile; May NOT edit any other data for this facility, generate a Statement of Energy Performance or submit an ENERGY STAR Building Application
<input type="checkbox"/> Read Only	Read Access only; May NOT edit any data for this facility, generate a Statement of Energy Performance, submit an ENERGY STAR Building Application or create/edit a Building Profile

Optional Rights (rights that are added to the selected access role)

Can this user set a baseline for the shared facilities?



Yes



No

(Note: There is only one baseline date per facility.)

Can this user provide access to the shared facilities with other users?



Yes



No

(Note: A user cannot delegate any access role greater than their own. See table above. All users who are given this right will be able to assign this right to other users.)

Can this user delete the shared facilities from your account?



Yes



No

(Note: This right is reserved only for Facility/Profile Editors or Facility Editors.)

STEP 3: Specify the group from this user's account to place the shared facility(ies). [Learn more](#) about sharing into groups.

Select Facilities to Share with Jack Drummond - Boma Austin

Select all facilities for which you would like to provide this user with access. To remove access, uncheck the checkbox next to that facility. Note: you will only be able to share facilities that you currently have access to share.

The access role and rights you selected in Step 2 are:

Access Role: **Portfolio Manager General User**

Able to Set Baseline? **Yes**

Able to Delegate Access? **No**

Able to Delete Facility? **No**

Accessible to User through: **Main Portfolio**

The "Current Access Level" columns allow you to see whether this user has already been provided access to this facility by you or another user. If you choose to change the access role here, your selection will replace the current access role.

If the access role or optional rights for a particular facility listed below in the "New Access Level" columns do not match those listed above, you do not have access to share that facility at the level you have chosen in Step 2. You can either choose to select the recommended access role/rights listed in the "New Access Level" columns below or provide a different level of access to that user at a later date.

STEP 4: Select all facilities in your account that you would like to share with Jack Drummond.

Select Facilities to Share	Facility Name	Current Access Level	New Access Level
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		Access Role (provided by)	Optional Rights	Access Role	Optional Rights
<input checked="" type="checkbox"/>	301 Sundance	Read Only	Set Baseline? Yes Delegate? No Delete? No	Portfolio Manager General User	Set Baseline? Yes Delegate? No Delete? No

Confirmation

You have identified the following facility access changes for **Jack Drummond, Boma Austin**. Please review these selections below. If you want to proceed with making these changes for this user, select "Save." The user will receive an e-mail confirming this change has been made to their account (along with a copy to you). Select "Cancel" to return to Step 4 to make any needed adjustments.

STEP 5: Confirm that all access changes are correct		
Access Provided to: Jack Drummond, Boma Austin		
Accessible to User through: Main Portfolio		
Access Role: Portfolio Manager General User Able to Set Baseline? Yes Able to Delegate Access? No Able to Delete Facility? No		
Facilities where Access is being granted	Facilities where Current Access Role/Rights are being changed	Facilities where Access is being removed
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