



## Share Your Building Data for New & Existing Users

by BOMA Dallas Green Task Force

1. From your building's Facility Summary page on the ENERGY STAR website select the “**Add** user to share this Facility” link toward the bottom right-hand side of the screen.

Sample view:

### General Facility Administration

[Track](#) Energy Performance Improvements  
[Delete](#) this Facility from Portfolio Manager  
[Contact](#) us

### Sharing Data

[Add](#) user to share this Facility  
[Modify](#) list of users  
[Transfer](#) Facility to another user  
[View](#) entire Access List for this Facility

### Applying for the ENERGY STAR

[Apply](#) for the ENERGY STAR  
[View](#) status of ENERGY STAR Applications

Please note that if you log on to ENERGY STAR with an individual user ID but your building rolls up under your company's ENERGY STAR Portfolio Manager, you may not see the option to “**Add** user to share this Facility.” In this case, you will need to contact your company's assigned Portfolio Manager administrator to ask that they share your building data.

2. The **Select User and Master Account** page will open. Select the Portfolio Manager Master Account dropdown menu. Scroll down to **BOMA Dallas**. Then select "Continue."

#### Share Your Facilities with a User or Master Account

Users with whom you share facilities are able to see your name and e-mail address on their Facility Summary page for that shared facility. Users 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 this facility.

Select the Portfolio Manager user account to which you want to grant access or modify existing access rights.

Select user from my current access list:

- OR -

Enter Portfolio Manager Username:

- OR -

Select a Portfolio Manager Master Account:  [Learn more](#) about Master Accounts

3. The **Select Access Rights** page will open. Select only the following as indicated and then choose **Save** at the bottom of the screen.

Read Only

Can this user set a baseline for the shared facility? - NO

Can this user provide access to the shared facilities with other users? - NO

Can this user delete the shared facilities from your account? - NO

	create/edit a Building Profile
<input type="radio"/> 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 checked="" type="radio"/> 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**

Can this user set a baseline for this facility?  Yes  No  
(Note: There is only one baseline date per facility.)

Can Joe Marchant provide access to this facility's data 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 Joe Marchant delete this facility from your account?  Yes  No  
(Note: This right is reserved only for Facility/Profile Editors or Facility Editors.)

**Specify the group from this User's account in which to place the shared facilities.** [Learn more](#) about sharing into groups.

Main Portfolio ▾

**Select a Building Profile Account for this user (available for Profile Editor Access Roles only):**

**Facility Owner/Service and Product Provider Accounts**

Facility Owner (Primary Profile Account)

CANCEL SAVE

4. Finally, the **Notification** page will open. You will be notified that an e-mail has been sent on your behalf to the user you have just shared facilities with. Select **Return** and you will be returned to the **My Portfolio** page.