



How to Use a Portfolio Manager Master Account

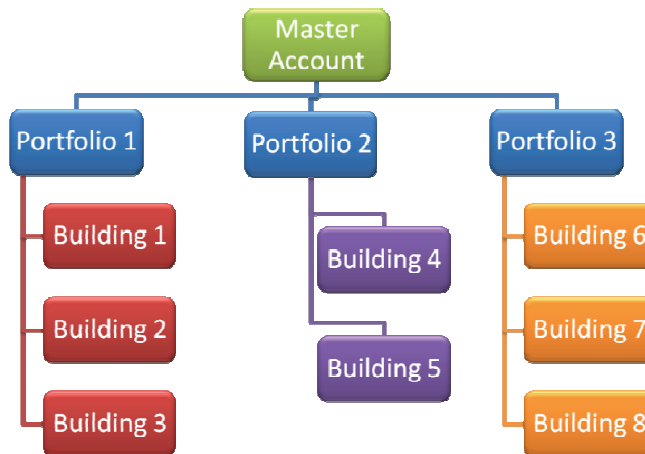
What is a Master Account?

A master account is a designated Portfolio Manager account into which multiple Portfolio Manager users can share building and energy information.

Who typically uses a Master Account and how are they used?

- An organization with separately managed facilities that are geographically dispersed that would like to centralize energy consumption tracking
- Industry associations or organizations launching a benchmarking competition
- A state/local government or related entity implementing an energy efficiency policy/initiative
- Facility managers of building types that are not eligible for energy performance scores wishing to collect data from peers in order to identify an average weather-normalized energy intensity

Example Master Account Structure in Portfolio Manager



How does a Master Account work?

- A master account is typically administered by one Portfolio Manager account holder.
- When first creating the master account, the administrator should create an organization name that is easily recognized by others who will be sharing into the account.
- Any number of users can use the “Share” feature in Portfolio Manager to share data from their Portfolio Manager account with the master account. Also, users can share into more than one master account at a time.
 - Each user can designate the level of sharing rights (e.g. read-only, facility editor) provided to the master account.
 - After sharing a building with the master account, anytime a user updates that building in their individual Portfolio Manager account, it will also be updated in the master account.
 - A user can remove their building from a master account by ending the sharing rights granted to the account.
- Only the master account administrator can view data that has been shared into the account.
 - Participants sharing into the master account cannot view other participants’ data in Portfolio Manager.
- The administrator can use the reporting/graphing feature in Portfolio Manager to analyze the data, export the data into a variety of output formats, and even communicate aggregate performance metrics back to participants.