



Syncing a New Property with Arc

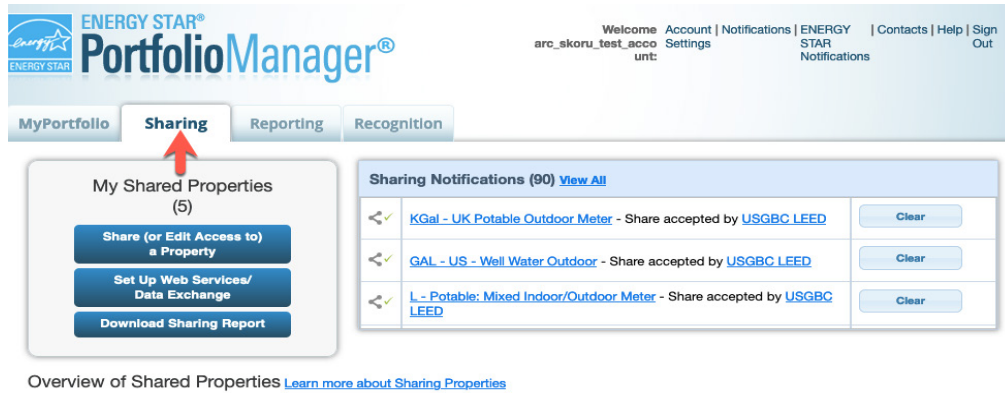
6/9/2021

This guidance is to assist you with the steps to sync a Property from ENERGY STAR® Portfolio Manager® to Arc platform.

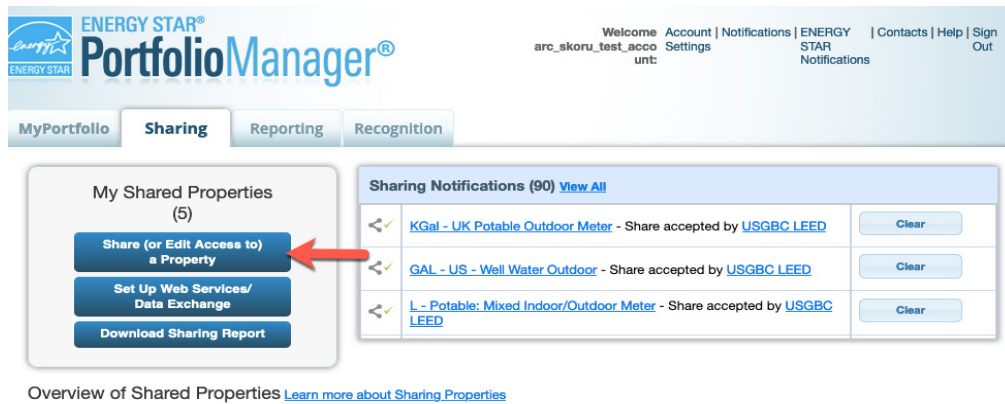
Before a Property and its meter can be synced with Arc, it has to be shared with existing Arc account in ENERGY STAR® Portfolio Manager®.

To get started with Property and meter sharing, follow the below steps.

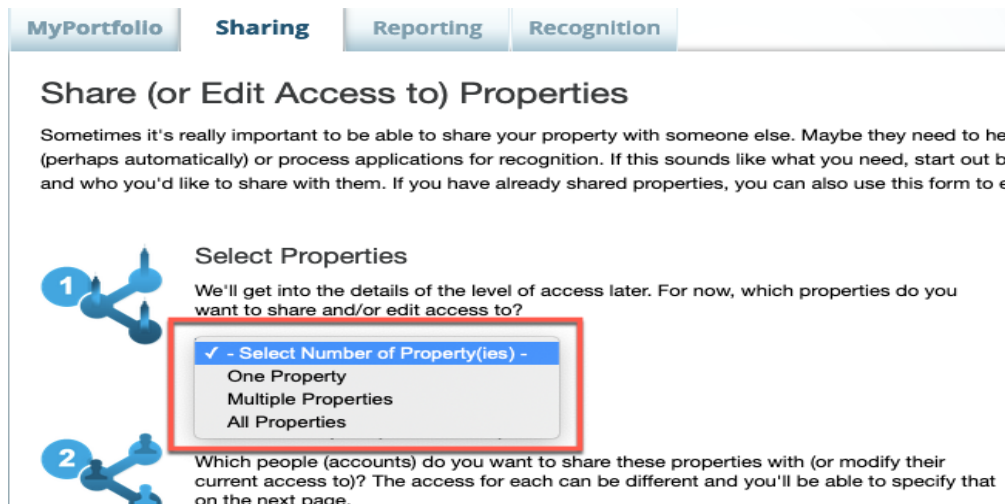
1. Go to ENERGY STAR® Portfolio Manager®, login to your account and select the 'Sharing' Tab.



2. Click on 'Share a Property' button.



3. Select the number of Properties from the 'Select Properties' dropdown.



- Select people accounts 'USGBC LEED (LEEDPERFORMANCEREPORTING)'. You can add this from your contact book.

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:

USGBC LEED (LEEDPERFORMANCEREPORTING)

Select contacts from my contacts book:

USGBC LEED (LEEDPERFORMANCEREPORTING)

- In the choose Permissions section select appropriate Sharing option. We recommend Personalized Sharing.

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](#)

- Click on Continue button



- Click on 'Edit' Under 'Exchange data' Column, to set the permissions for your Property(ies).

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
▼ Sample Engineering Laboratory (Canada) (15935260)					
USGBC LEED	<input type="radio"/>				Edit
▼ Sample Library (US) (15832424)					
USGBC LEED	<input type="radio"/>				Edit
▼ Sample Library (US) (15832425)					Edit
USGBC LEED	<input type="radio"/>				Edit
▼ Sample Office (US) (15703786)					
USGBC LEED	<input type="radio"/>				Edit
▼ Sample University (including one child building) (Canada) (15935259)					
USGBC LEED	<input type="radio"/>				Edit

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.

.....

8. Allow access for all the meters, we recommend 'Full Access'.

Select Access Permissions to [Sample Library \(US\)](#) for [USGBC LEED](#).
The following information is required by [USGBC LEED](#) in order to provide service to your property(ies). If you have any q complete this information, please contact them directly.

Select the permission level below that you would like to grant [USGBC LEED](#) for each category.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ All Meter Information			
▼ Energy Meters			
District Hot Water	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Electric Grid Meter-AMULYA	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Electric Solar Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Natural Gas	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Natural Gas-DFI FTF	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

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

9. Once the permissions are set, click on 'Apply Selections & Authorize Exchange' button.

Select Access Permissions to [Sample Library \(US\)](#) for [USGBC LEED](#).

Potable: Mixed Indoor/Outdoor Meter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Waste Meters			
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Recognition	<input type="radio"/>		<input checked="" type="radio"/>

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

Additional Options:

Item	Yes	No
* Share Forward Allow USGBC LEED to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

Apply Selections & Authorize Exchange [Cancel](#)

10. Click on 'Share Property(ies)' button.

Sort by: [Property Name](#)

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Sample Engineering Laboratory (Canada) (15935260)			<input checked="" type="radio"/>		
USGBC LEED	<input type="radio"/>				Edit
▼ Sample Library (US) (15832424)			<input checked="" type="radio"/>		
USGBC LEED	<input type="radio"/>				Edit
▼ Sample Library (US) (15832425)			<input checked="" type="radio"/>		
USGBC LEED	<input type="radio"/>				Edit
▼ Sample Office (US) (15703786)			<input checked="" type="radio"/>		
USGBC LEED	<input type="radio"/>				Edit
▼ Sample University (including one child building) (Canada) (15935259)			<input checked="" type="radio"/>		
USGBC LEED	<input 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](#)

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11. You will receive a success message for successful sharing.

MyPortfolio **Sharing** Reporting Recognition

You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.
If you edited web services Custom ID fields, [read this](#).

My Shared Properties (5)

Share (or Edit Access to) a Property

Set Up Web Services/ Data Exchange

Download Sharing Report

Sharing Notifications (90) View All

✓	KGal - UK Potable Outdoor Meter - Share accepted by USGBC LEED	Clear
✓	GAL - US - Well Water Outdoor - Share accepted by USGBC LEED	Clear
✓	L - Potable: Mixed Indoor/Outdoor Meter - Share accepted by USGBC LEED	Clear

12. Once the share request is accepted by the USGBC team, you will get the notifications in the 'Sharing Notifications' tab.

MyPortfolio **Sharing** Reporting Recognition

My Shared Properties (5)

Share (or Edit Access to) a Property

Set Up Web Services/ Data Exchange

Download Sharing Report

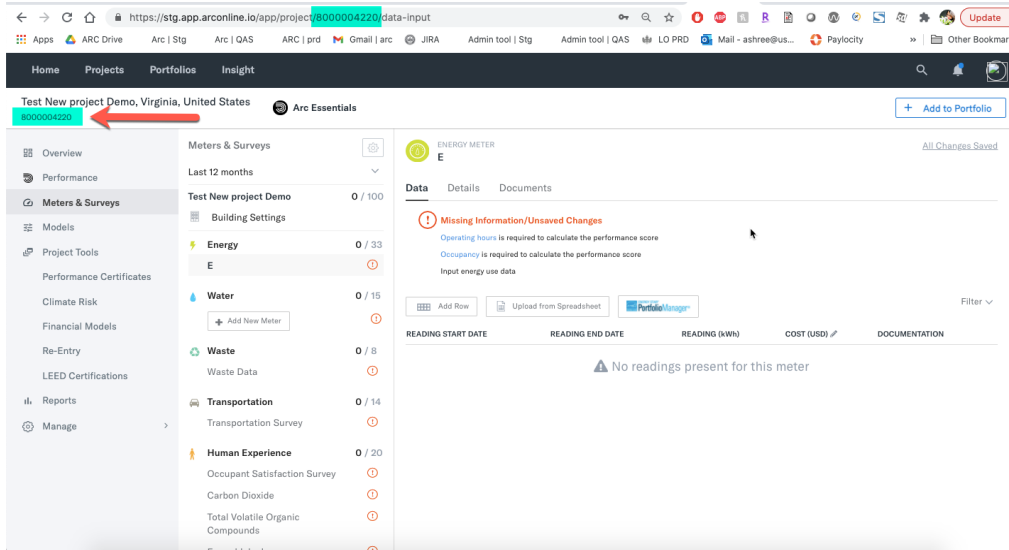
Sharing Notifications (90) View All

✓	KGal - UK Potable Outdoor Meter - Share accepted by USGBC LEED	Clear
✓	GAL - US - Well Water Outdoor - Share accepted by USGBC LEED	Clear
✓	L - Potable: Mixed Indoor/Outdoor Meter - Share accepted by USGBC LEED	Clear

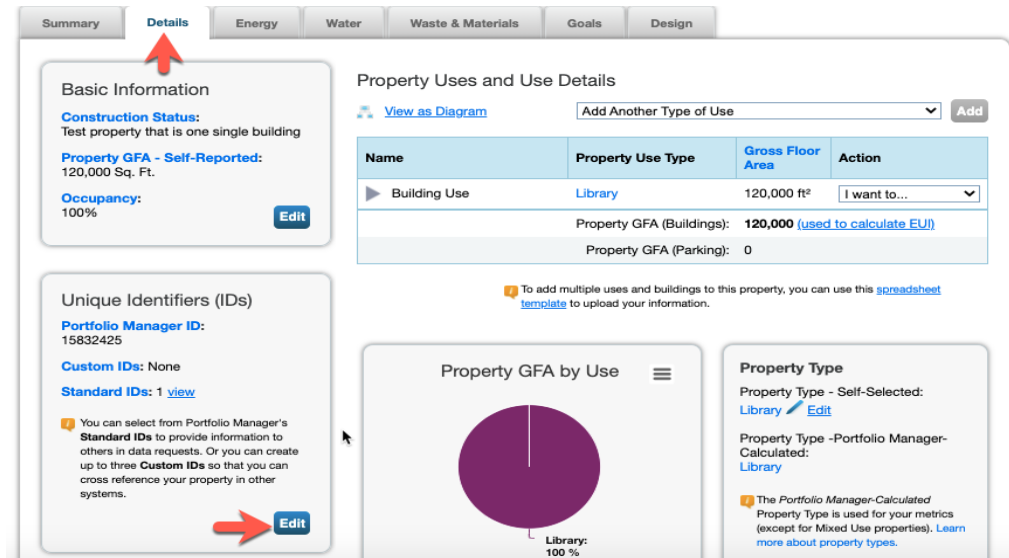
Once the Property is shared successfully, please use the below steps to sync your Arc Project ID into ENERGY STAR® Portfolio Manager®. These steps can also be performed before sharing your Property.

The below guidance is to assist you with the steps to configure an Arc Project ID into ENERGY STAR® Portfolio Manager®

1. Copy the Project ID from Arc platform



2. Under ENERGY STAR® Portfolio Manager® Property, Go to Details tab and select 'Edit':



3. Select option 'LEED US Project ID' from the Standard Id dropdown and add your Arc Project ID and click 'Save' Button to sync the data between ENERGY STAR® Portfolio Manager® and Arc platform.

Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

Standard ID(s):

ID:

[+ Add Another](#)

Save [Cancel](#)

Atlanta Building ID
Austin Building ID
Austin Property ID
Berkeley Building ID
BOMA BEST Building ID
Boston Energy Reporting ID
Boulder Energy Reporting ID
British Columbia - Building Benchmark BC ID
California Building ID
Cambridge Building Energy Reporting ID
Chicago Energy Benchmarking ID
Columbus Building ID
CoStar Property ID
Denver Building ID
Des Moines Building ID
District of Columbia Building Unique ID
District of Columbia Real Property Unique ID
Evanston Building ID
Fort Collins Building ID
Green Globes CIEB Project ID
Green Globes NC Project ID
HUD Property AMP ID
HUD Property REMS ID
Kansas City Building Reporting ID
LEED Canada Project ID
LEED US Project ID
Longmont CO Energy Benchmarking Building ID
Los Angeles Building ID
Minneapolis Building ID
Minneapolis Property ID
MN Efficient Buildings Collaborative ID
Montgomery County, MD Building ID (MBID)
NYC Borough, Block and Lot (BBL)
NYC Building Identification Number (BIN)
NYC PACE ID
Ontario EWRB ID

...names. Only people who have

ID:

ID:

ID:

...most state and local governments
benchmarking law, you probably need to

ID:

[+ Add Another](#)

Save [Cancel](#)

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Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

Standard ID(s):

ID:

[+ Add Another](#)

Save [Cancel](#)

- To check if your ID is successfully added, go to Details → Unique Identifiers → Click the link 'view' and check if your Arc Project ID is added, Click Save button.

Sample Library (US)
 88 Rose Street, Portland, OR 97202 | [Map It](#)
 Portfolio Manager Property ID: 15832424
 Year Built: 2002
[Edit](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?
Current: 48,091.6
(33382.51% higher than median.)
Baseline: 46,662.6
(32387.61% higher than median.)

Summary | **Details** | Energy | Water | Waste & Materials | Goals | Design

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
120,000 Sq. Ft.

Occupancy:
100% [Edit](#)

Unique Identifiers (IDs)

Portfolio Manager ID:
15832424

Custom IDs: None

Standard IDs: 1 [view](#)

You can select from Portfolio Manager's Standard IDs to provide information to others in data requests. Or you can create up to three Custom IDs so that you can cross reference your property in other systems. [Edit](#)

Property Uses and Use Details

[View as Diagram](#) | Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Library	120,000 ft²	I want to...

Property GFA (Buildings): **120,000** (used to calculate EUI)
 Property GFA (Parking): 0

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Property GFA by Use

Library: 100%

Property Type

Property Type - Self-Selected:
[Library](#) [Edit](#)

Property Type -Portfolio Manager-Calculated:
[Library](#)

The Portfolio Manager-Calculated Property Type is used for your metrics (except for Mixed Use properties). [Learn more about property types.](#)

Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

Standard ID(s):
LEED US Project ID: [Remove ID](#)

ID: [Add Another](#)

[Save](#) [Cancel](#)

Please note, for the first-time sync, the user will have to wait for 24-48 hours after the Property share request is accepted by USGBC account or Standard ID is updated whichever is later.

Created new Arc Project ID that needs to be configured into existing ENERGY STAR® Portfolio Manager® Property?

In Case, the project team creates a new Arc Project ID, and if they wish to sync the data from ENERGY STAR® Portfolio Manager® Property ID to newly created Arc Project ID, they need to go and update the Arc Project ID by following the below mentioned steps-

1. In the Details tab → Edit button.

2. Under Standard Id section, Replace the existing Arc Project ID with the newly created Arc Project ID and click Save button.

3. New Arc Project ID will overwrite the old Arc Project ID.