

## 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.

ENERGY STAR® Portfoli	oManag	ler®	Welcome Account   Notifications   ENERGY arc_skoru_test_acco Settings STAR unt: Notification	Out
MyPortfolio Sharing	Reporting	Recognition		
My Shared Pro	operties		fications (90) <u>View All</u> K Potable Outdoor Meter - Share accepted by USGBC LEED	Clear
Share (or Edit Ad a Propert			S - Well Water Outdoor - Share accepted by USGBC LEED	Clear
Set Up Web Se Data Excha	nge	<	ble: Mixed Indoor/Outdoor Meter - Share accepted by USGBC	Clear
Download Sharin	g Heport			

Overview of Shared Properties Learn more about Sharing Properties

2. Click on 'Share a Property' button.

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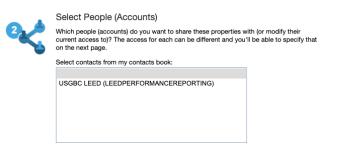
Overview of Shared Properties Learn more about Sharing Properties

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

MyPortfolio	Sharing	Reporting	Recognition	
Share (or	r Edit Acco	ess to) Pro	perties	
(perhaps autom	atically) or process	s applications for re	ecognition. If this s	omeone else. Maybe they need to hel; ounds like what you need, start out by erties, you can also use this form to ec
				or now, which properties do you
	✓ - Select Num One Property Multiple Prop All Properties	erties	) -	
		o)? The access for		properties with (or modify their ent and you'll be able to specify that



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



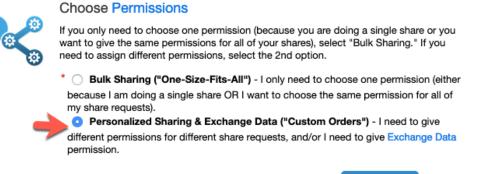
Select contacts from my contacts book:

USGBC LEED (LEEDPERFORMANCEREPORTING)

Continue

Cancel

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



6. Click on Continue button



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

4 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	Select Permission The access levels you s person.	Lo Ioi Edoii -	oomaot	each property or each	Forward* i Custom - permission permission Exchange permission permission	You decide, along with ns for property, meter, g ns. • Data -You decide, alo ns for property, meter, g	the individual poals and recognition ng with the individual poals and recognition
Name (ID)			No Access	Read Only Access	Full Access	Custom Access	Exchange Data
Sample Eng	gineering Laboratory (Car	nada) (15935260)	)				·
USGBC	LEED		$\circ$				O Edit
Sample Libr	rary (US) (15832424)						
USGBC	LEED		$\circ$				O Edit
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Sample Offi	i <u>ce (US</u> ) (15703786)					-	
USGBC	LEED		0				O Edit
Sample Uni	iversity (including one chi	ld building) (Can	ada) (15935259)				
USGBC	LEED		0				Edit



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

elect Access Permissions to <u>Sample Librr</u> he following information is required by <u>US</u> omplete this information, please contact t elect the permission level below that you	GBC LEED hem directly	in order to provide sen		
Item	None	Read Only Access	Full Access	
Property Information	0	0	0	
All Meter Information				
Energy Meters				
District Hot Water	0	0	0	
Electric Grid Meter-AMULYA	0	0	•	
Electric Solar Meter	0	0	•	
Natural Gas	0	0	0	
Natural Gas-DELETE	0		•	

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

Select Access Permissions to Sample Library (	US) for I	USGBC LEED.				
Potable: Mixed Indoor/Outdoor Meter	0	0	0			
S Waste Meters						
Goals, Improvements, & Checklists	0	0	0			
Recognition	0		0			
Additional Options:						
Additional Options: Item					Yes	No
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Item * Share Forward Allow USGBC LEED to share this property	with ot	hers and give them	any permissions t	hat he/she has, including the right to share Apply Selections & Authorize Ex	0	G
Item * Share Forward Allow USGBC LEED to share this property	with ot	hers and give them	any permissions t		0	G

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

lame (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
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USGBC LEED	0				O Edit
Sample Library (US) (15832424)					
USGBC LEED	0				O Edit
Sample Library (US) (15832425)					
USGBC LEED	0				O Edit
Sample Office (US) (15703786)		1		1	
USGBC LEED	0				O Edit
Sample University (including one child building) (Can	ada) (15935259)	1		1	
USGBC LEED	0				O Edit
Some of your contacts already have access to the p accpetance is required.	properties you select	ed. When you select		heir access levels wil	



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

MyPortfolio Sharing	Reporting	Recognition		
	to current permissions	, the edits have be	you shared properties, you will receive a notification when your con en made, no acceptance is required.	tact has accepted the
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12. Once the share request is accepted by the USGBC team, you will get the notifications in the 'Sharing Notifications' tab.

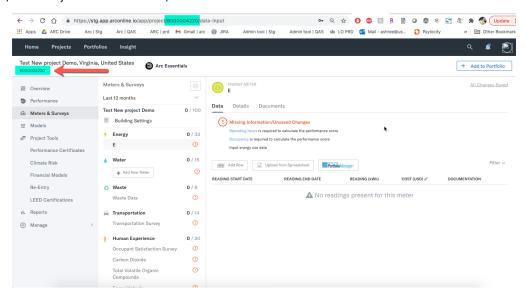
MyPortfolio	Sharing	Reporting	Recognition	
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	(5)		KGal - UK Potable Outdoor Meter - Share accepted by USGBC LEED	Clear
Sha	re (or Edit Acce a Property	ss to)	GAL - US - Well Water Outdoor - Share accepted by USGBC LEED	Clear
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Dow	nload Sharing F	leport		



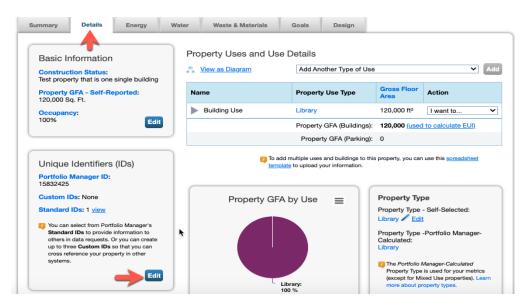
Once the Property is shared successfully, please use the below steps to sync your Arc Project ID into ENERGY STAR® Portfolio Manager®. These steps can also be performed before sharing your Property.

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.

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dard ID(s):		
	ndard ID(s):	
EED US Project ID VID: 8000004220		V ID: 8000004220



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

88 Rose Street, Portland, OR Portfolio Manager Property ID		Not currently eligible for ENERGY STAR Certificat	tion Weat Source	ther Normalized we ce EUI (kBtu/ft²) 🔤
Year Built: 2002			(33382. Base	51% higher than median.)
Summary Details Energy W	ater Waste & Materials	Goals Design		
Basic Information	Property Uses and Us	e Details		
Construction Status: Test property that is one single building	View as Diagram	Add Another Type of Use	e	✓ Ac
Property GFA - Self-Reported: 120,000 Sq. Ft.	Name	Property Use Type	Gross Floor Area	Action
Occupancy:	Building Use	Library	120,000 ft <sup>2</sup>	I want to 🗸
100%		Property GFA (Buildings):		to calculate EUI)
		Property GFA (Parking):	. 0	
Custom IDs: 1 view Standard IDs: 1 view Vou 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 crease reference your property in other systems.	Property GF	A by Use ≡ Library: 100 %	Library <u>Edi</u> Property Type Calculated: Library The Portfolio . Property Type	- Self-Selected: -Portfolio Manager- Manager-Calculated Is used for your metrics xed Use properties). Learn
Standard IDs Standard IDs are typically used with benchmarking laws. If you fill this in. See this FAQ if you r Standard ID(s): LEED US Project ID:	r property is covered I	by a benchmarking la	iw, you pro	move ID
				Save Can

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  $\rightarrow$  Edit button.

					- Detelle			
Basic Ir	nformation		Pro	operty Uses and Us	e Detalls			
	tion Status:	single building		View as Diagram	Add Anot	her Type of Use		•
	GFA - Self-Re	• •	Na	ame	Propert	y Use Type	Gross Floor Area	Action
Occupan	cy:			Building Use	Office		275,000 ft <sup>2</sup>	I want to
95%		Edit			Property	y GFA (Buildings)	: 275,000 ( <u>used</u>	d to calculate EUI)
					Prope	rty GFA (Parking)	: 0	
Portfolio	Manager ID:							
Portfolio 15703786	Manager ID:							
				Property GF	A by Use	=	Property Typ	ре
15703786 Custom II				Property GF	A by Use	=	Property Type	- Self-Selected:
15703786 Custom II Standard	Ds: None	folio Manager's		Property GF	A by Use	=		- Self-Selected:
15703786 Custom II Standard () You can Standard	Ds: None IDs: 1 <u>view</u> select from Ports d IDs to provide	information to		Property GF	A by Use	=	Property Type Office <u>Edit</u> Property Type	- Self-Selected:
15703786 Custom II Standard You can Standar others in up to thr	Ds: None IDs: 1 view select from Portt d IDs to provide data requests. ( ree Custom IDs s	information to Dr you can create so that you can		Property GF	A by Use	=	Property Type Office / Edit	- Self-Selected:
15703786 Custom II Standard You can Standar others in up to thr	Ds: None IDs: 1 view select from Portt d IDs to provide d data requests. ( ree Custom IDs ference your prop	information to Dr you can create so that you can		Property GF	A by Use	=	Property Type Office Edit Property Type Calculated: Office	- Self-Selected:
15703786 Custom II Standard You can Standar others in up to thr cross ref	Ds: None IDs: 1 view select from Portt d IDs to provide d data requests. ( ree Custom IDs ference your prop	information to Dr you can create so that you can		Property GF	A by Use	≡	Property Type Office Edit Property Type Calculated: Office The Portfolio I Property Type	- Self-Selected: -Portfolio Manager-

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

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: replace this id with new id
ID:
Save Cancel

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

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:	Id replaced	8000004269 X Remove IC	<u>)</u>	
		ID:  Add Another		