

Benchmarking energy and water with ENERGY STAR

It is possible to obtain points associated with performance metrics in the BOMA BEST questionnaire. Specifically, points can be awarded for the ability to calculate a weather-normalized site energy use intensity, water intensity and ENERGY STAR Score.

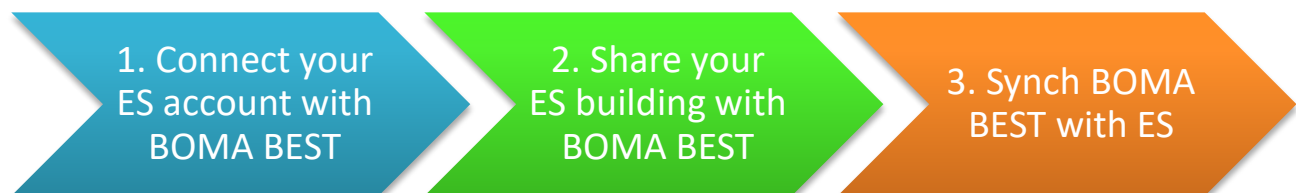
Energy and water consumption data can be entered in the BOMA BEST Online Portal or in an existing ENERGY STAR (or ES) account. In either case, it is necessary to specify your synchronization preference in the BOMA BEST Online Portal so that ENERGY STAR methodology can be used to calculate performance metrics.

Follow the instructions in this present document if you prefer to enter your energy and water consumption data in an existing ES account. Once you have synchronized your accounts, all the data you have entered in ES will be auto-populated in BOMA BEST. It may take up to 72 hours for this to occur. The steps listed in this document are only required for the initial set up.

If you prefer to enter your data directly in BOMA BEST instead, follow [these instructions](#).

Overview

There are 3 steps¹:



1. In ENERGY STAR: Connect your ES account with the main BOMA BEST ES account
2. In ENERGY STAR: Share your building with the main BOMA BEST ES account
3. In BOMA BEST: Synch your BOMA BEST building to Pull data from ES

¹ The steps in this document pre-suppose that energy and water consumption data (24 months for energy; 12 months for water) has already been entered in ES. For more details on completing your ES account:

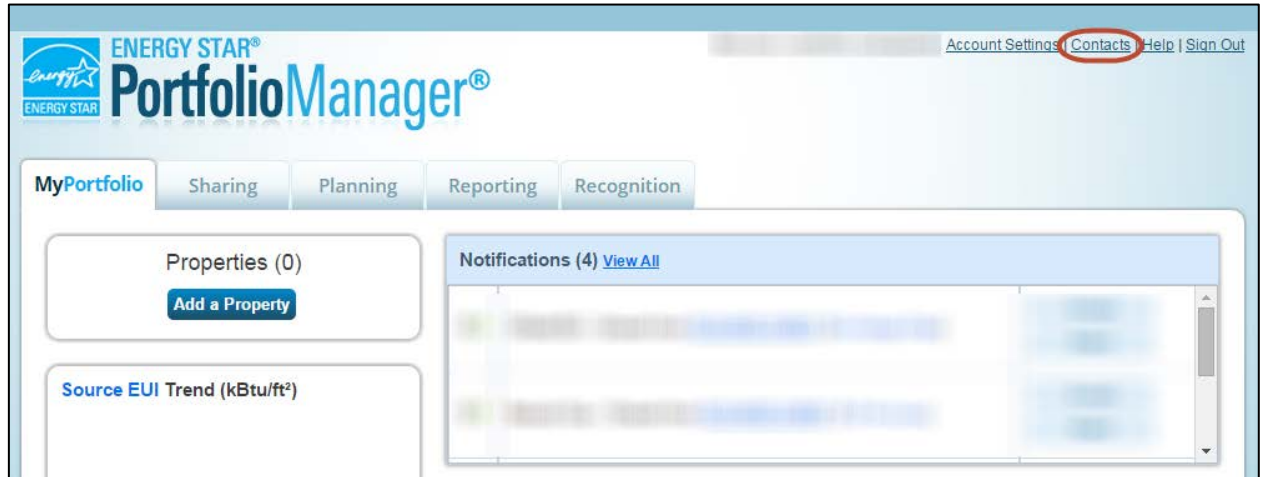
- ENERGY STAR Quick Start Guide: https://www.energystar.gov/sites/default/files/tools/Portfolio%20Manager%20Quick%20Start%20Guide_0.pdf
- Comprehensive guidelines on ENERGY STAR Portfolio Manager: <https://portfoliomanager.zendesk.com/hc/en-us>



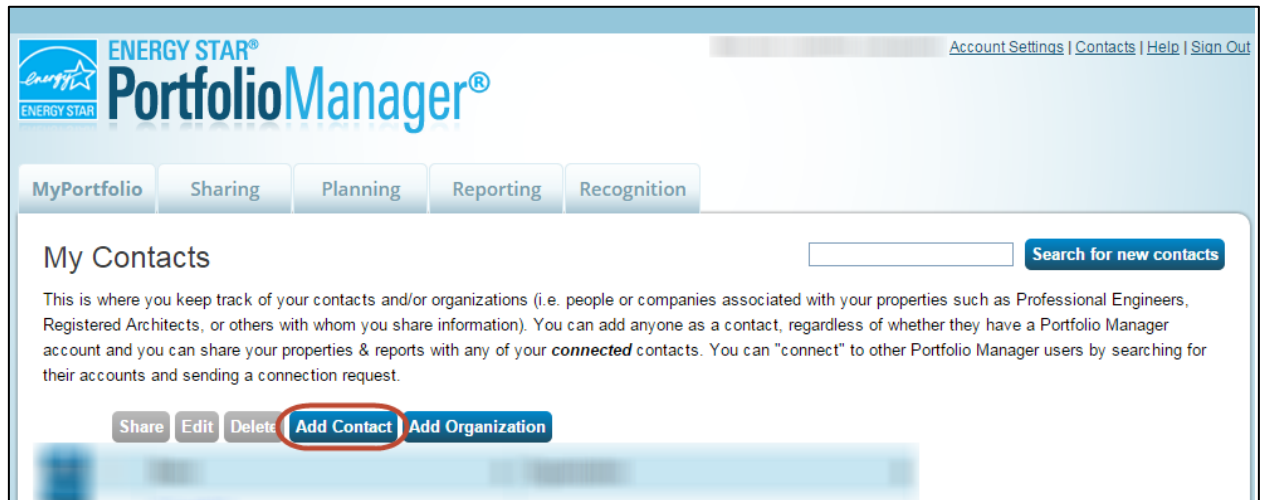
1. Connect your ES account with BOMA BEST ES account

Just like you have an account in ENERGY STAR (ES), does BOMA BEST too. Before doing anything in the BOMA BEST Online Portal, you must begin in your ES account and *connect* your account with the BOMA BEST ES main account.

- 1.1. Visit www.energystar.gov and log in to your ES account.
- 1.2. At the top right of the homepage, click **Contacts**.



- 1.3. The My Contacts page is displayed. Click **Add Contact**.





1.4. The Add Contact page is displayed. In the **Organization** box type *BOMA BEST* and click **Search**.

Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account, and when they accept the request, they will be added to your Contacts. Second, if the contact does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:

Organization:

Username:

Email:

Search [Cancel](#)

1.5. Find **BOMA BEST** in the search results and click **Connect**.

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

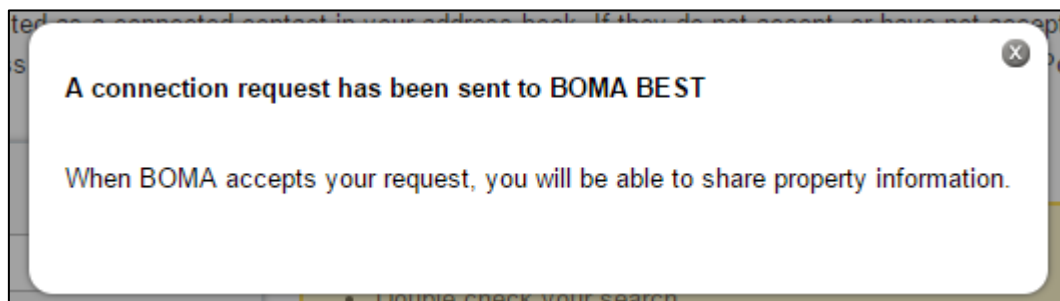
Name:

Organization:

BOMA BEST
BOMA BEST with BOMA BEST **Connect**

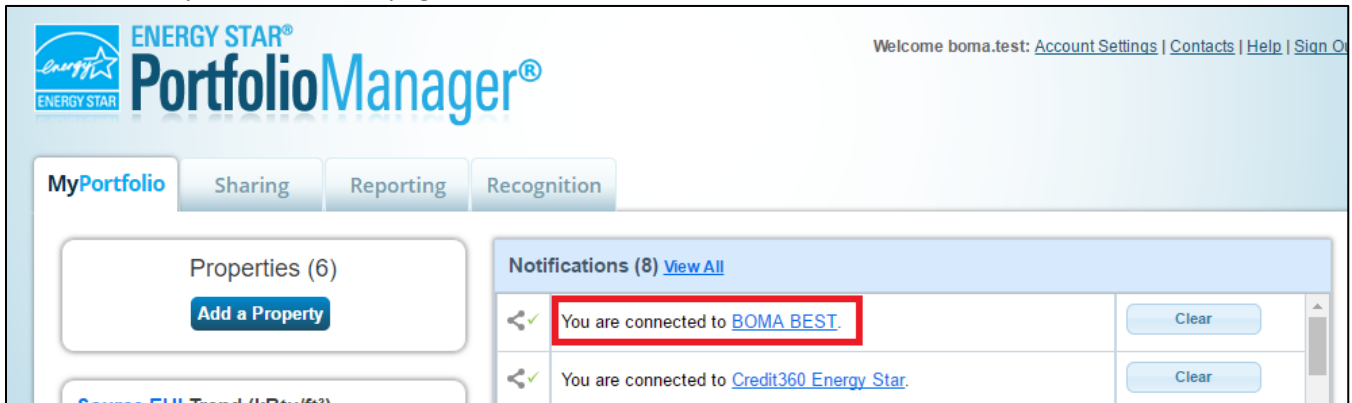
Page 1 of 1 | 50 | 1 - 1 of 1

1.6. You will receive a confirmation from the system. Please allow at least 24 hours for the request approval process to be completed.





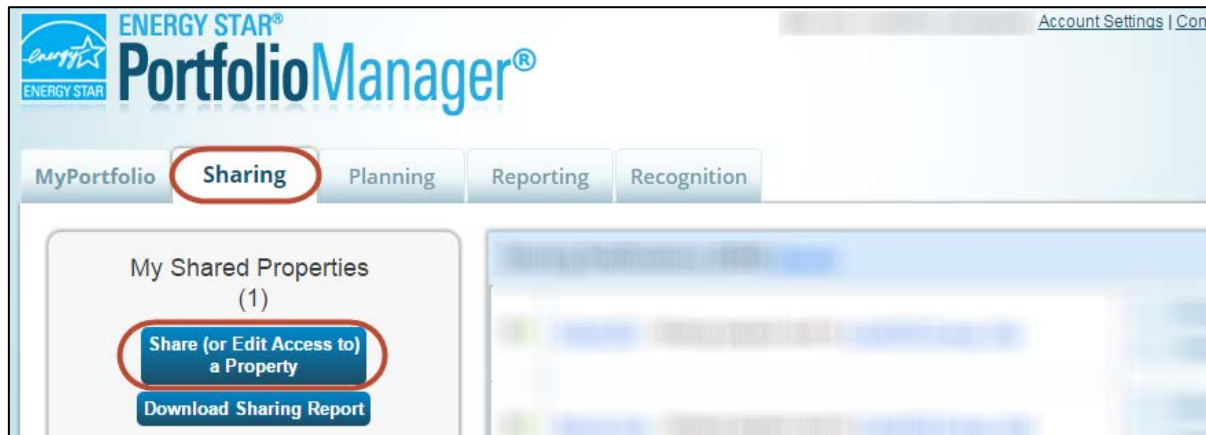
1.7. When your connection request has been approved, a notification appears on your ES homepage or on your notification page.



2. Share your buildings with the BOMA BEST ES account

Now that you've connected your account, it is time to *share* your building with the BOMA BEST ES account.

- 2.1. Visit www.energystar.gov and log in to your ES account.
- 2.2. Open the **Sharing** tab and click **Share (or Edit Access to) a Property**.





2.3. The **Sharing** page is displayed.

MyPortfolio **Sharing** Reporting Recognition

Share (or Edit Access to) Properties

1 **Select Properties**
We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

a.

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:

b.

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 or share with Data Exchange providers, 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 shares, accounts).

c. 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.

d. [Cancel](#)

- a. Under "Select Properties", specify whether you want to share a single property, multiple properties or all properties (TIP: If you have many building that exist in BOMA BEST, select **All Properties**).
- b. Under "Select People (Accounts)", select **BOMA BEST (BOMA BEST)**.
- c. Under "Choose Permissions", select **Personalized Sharing & Exchange Data ("Custom Orders")**.
- d. Click **Continue**.



2.4. The **Share Your Property(ies)** page is displayed. For each property, set the permission for **BOMA BEST** to **Full Access** (TIP: Click on the Full Access button at the top of the table to automatically select all buildings).

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

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:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Heath Care (5869093)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
BOMA BEST	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Who gets to Share Forward?

- Full Access** - Automatically includes "Share Forward" rights
- 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.

2.5. Click **Share Properties**.

▼ [Universal Test](#) (5859532)

BOMA BEST	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
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[Share Property\(ies\)](#) [Cancel](#)

2.6. Once BOMA BEST ES has accepted your request, it will be forwarded to *Credit360 Energy Star* (the IT provider for BOMA BEST). This may take up to 48 hours. Once complete, you will see the following notification on your homepage:

Sharing Notifications (11) [View All](#)

← ✓ Light Industrial Test - Share accepted by BOMA BEST	Clear
← ✓ Light Industrial Test - Share accepted by Credit360 Energy Star because Connection request accepted by automated system.	Clear
← ✓ Office Test - Share accepted by BOMA BEST	Clear

2.7. You can now proceed with Step 3.



3. Preparing your BOMA BEST account to receive the data

Caution: By following these steps, the system will automatically override any consumption data that was entered directly in the BOMA BEST Portal. It will be replaced with the data that exists in your building's ES account. To avoid confusion, we recommend selecting only one portal in which to enter your data – either ES or BOMA BEST. Continue with these instructions if you choose ES as your central database. If you prefer to use BOMA BEST, follow [these instructions](#).

3.1. Log in to you BOMA BEST account (<https://boma.credit360.com>)

3.2. Click on **Property** to show the My Properties list.

DATA ENTRY **PROPERTY** ANALYSIS AUDIT MANAGEMENT FORMS ADMIN

My Properties | Status | Create new | Fund types | Funds | Management companies | Benchmarking

Properties

Create property | Edit users | Export | Load/Save report | Clear filter

Test Showing properties that are Active Add filter criteria Results per page

Building Name	ID	Street Address	Town	Gross...	Asset ty...	Status	Managm...	Pro...	Me...	Cer...	Cer...	Da
02_test3 (Nova Scotia) (Energy star Push test 18.09.2016) 22:27UKtime	402...	Church Street	Kings	1,000,...	Health Care	Payment overdue / Paiement en retard	To be assigned users/cor... company	Man...	Mem..	Bro...	25	2007

Property characteristics **Change...**

Address:

Property Type: **Office - Office**

3.3. Click on the building name.

3.4. You are now on the building's **Property Characteristics** page. Click **Change**. (Tip: you cannot do this if your building is in "Pending" status. Contact BOMA for more details)



3.5. Scroll down to the ENERGY STAR section.

Energy Star

No synchronization Pull from Energy Star Push to Energy Star

Data will be pulled from Energy Star into cr360 for this property.
Not yet synchronized

Portfolio Manager ID:

3.6. Select **Pull from ENERGY STAR** to pull data about the property from ES into BOMA BEST.

Energy Star

No synchronization Pull from Energy Star Push to Energy Star

Data will be pulled from Energy Star into cr360 for this property.
Not yet synchronized

Portfolio Manager ID:

3.7. Enter the ENERGY STAR ID for the property in the **Portfolio Manager ID** box.

You can find this ID on your building's ENERGY STAR homepage:

ENERGY STAR®
PortfolioManager®

MyPortfolio | Sharing | Reporting | Recognition

Light Industrial Test
Light Industrial Test Avenue, Quebec, QC J0V 1L0 | [Map It](#)
Portfolio Manager Property ID: 5859258
Year Built: 2001



3.8. When you have completed these steps, click **Save** at the bottom of the page. This may take a few moments. Please **do not refresh or close** the page until it has finished saving.

The first time your accounts synchronize, it may take up to 48 hours. Moving forward, it will refresh automatically every 24 hours. If there is sufficient, and correctly entered, data in ES the Weather-normalized Site EUI, Water Use Intensity and ENERGY STAR Score (if applicable) will appear in the grey box on your building's **Property Characteristics** page. These are pulled directly from ENERGY STAR.

Office Energy Test

Property characteristics [Change...](#)

	Address:	26 Sammon Avenue, Toronto, ON, M4J 1Y6, Canada
	Property Type:	Office - Office
	Gross Floor Area (for ENERGY STAR):	200,000 Square Feet
	ENERGY STAR Score:	100
	Total GHG emissions:	250 Metric Tons CO₂e
	Water Use Intensity :	1.25 m³/m²
	Weather-normalized Site Energy Use Intensity:	0.27 GJ/m²

Have questions about this process? Refer to the FAQ on the following pages.



FAQ

1. What kind of information is necessary to obtain the weather-normalized site Energy Use Intensity (EUI), Water Use Intensity (WUI) and ENERGY STAR Score (if applicable)?

Consult the ENERGY STAR Portfolio Manager FAQ for BOMA BEST buildings [here](#).

In short, to obtain a weather-normalized site EUI you must provide 24 consecutive months of energy consumption data, at a minimum. Consumption must be entered for each month (cannot be a bulk amount representing the complete 24-month timeframe). Enter consumption information for all fuel types used in the building. The entered data must not be any older than the past 36 months.

To obtain a WUI, enter water consumption data representing 12 consecutive months, at a minimum, for all meters (indoor and outdoor). The entered data must not be any older than the past 18 months nor should it represent consumption during periods of major renovations.

To obtain an ENERGY STAR Score, your building must be eligible (see the above FAQ) and your account must contain energy consumption data for 12 consecutive months, at a minimum.

2. What data is pulled from my ENERGY STAR account into my BOMA BEST account?

When you set the interface to “Pull” (as per instructions in this document), the following information is also auto-populated:

- The ENERGY STAR Gross Floor Area
- Meter reading data for any meters that have been shared (these are automatically updated in BOMA BEST when a new entry is entered in ENERGY STAR)
- Any Spaces that have been created in ENERGY STAR

If you add a new meter to your ENERGY STAR account after following these steps, the meter will not be automatically synchronized with your BOMA BEST account unless you specifically share it. See FAQ #6 for instructions.

3. What steps are necessary if I want to share another building?

Once your account is connected (Step 1) you do not need to repeat this step ever again. You can share as many buildings as you like that exist in your account by repeating Step 2 and 3 with each building.

4. How do I add a new entry for energy or water in BOMA BEST?

If synchronisation is set to *Pull* – the data and meters in BOMA BEST become READ ONLY. All new data must be entered directly in ENERGY STAR. Your BOMA BEST account will be refreshed automatically every 24 hours once the initial synch has occurred.

If you wish to add entries using the BOMA BEST account instead of ENERGY STAR moving forward, change the synchronization to *Push* instead. All the data that was auto-populated will remain and you will be able to start making edits. If you decided to return to *Pull*, any spaces or meters that exist in your BOMA BEST



account, but have not been added to your ENERGY STAR account, are added automatically to the ENERGY STAR account.

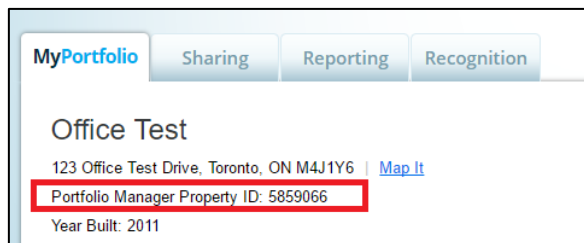
In general, we recommend that you only edit the property details:

- In ENERGY STAR if the synchronisation is set to **Pull**
- In BOMA BEST account if the synchronisation is set to **Push**

5. Why hasn't my data auto-populated in BOMA BEST?

There could be a few reasons for this:

- a) From your ENERGY STAR account, you have not *connected* your ENERGY STAR account with the BOMA BEST account. Follow the instructions in Step 1 of this document.
- b) You have performed the connection steps (Step 1 of this document) but your request for connection has not yet been accepted by BOMA BEST. This may take up to 24 hours.
- c) From your ENERGY STAR account, you have not *shared your building* with the BOMA BEST account in ENERGY STAR. Follow the instructions in Step 2 of this document.
- d) You have performed Step 2 in this document but your share request has not yet been accepted by "Credit 360 in Energy Star". This may take up to 48 hours.
- e) You did not perform Step 1 and Step 2 before performing Step 3. If you try to synch your account from the BOMA BEST portal before sharing and connecting in ENERGY STAR, the synch will not be successful. Ensure you have performed Step 1 (connecting) and Step 2 (sharing).
- f) From the BOMA BEST Portal, you did not enter the correct Portfolio Manager ID for your building's ENERGY STAR account. You can find the Portfolio Manager ID here in your ENERGY STAR account:



- g) Errors have been found with the synching. Sometimes errors will appear in the ENERGY STAR section of the BOMA BEST Portal (in the "Change" page of the Property Characteristics). If you see an error, click on it. Follow the instructions to resolve them then click "refresh".



Energy Star

No synchronization Pull from Energy Star Push to Energy Star

Data will be pulled from Energy Star into cr360 for this property.
Last synchronization: July 19, 2017 12:41:04 PM
1 errors

h) If it none of the above have resolved the issue, and you have waited 24 hours since the last “Refresh”, email info@bomabest.org (include the name of your building as it appears in the BOMA BEST portal).

6. Someone has shared their building data with me in ENERGY STAR. Can I link that building with a building in BOMA BEST?

In the case where you would like to populate your BOMA BEST account with data from properties that have been shared with you, ensure that you have “Share Forward” permission on the property (in ENERGY STAR) then share it with the “BOMA BEST” account as described in Step 1 and 2 of this document. As long as you have share forward permission for these properties, the original account holder does not need to perform these steps.

7. Will meters that are added after I have performed all the steps in this document be automatically synched with my BOMA BEST account?

No. If a meter is added after all these steps have been followed, that particular meter has not been shared. It will be necessary to specifically share that meter with BOMA BEST. Follow these steps:

a) On your ENERGY STAR Homepage, click on “Sharing”.

b) Click on “Credit360_Energy Star”

Name	Organization	Properties We Share	Action
BOMA Canada BOMA BEST (BOMA Canada - BOMA BEST)	BOMA Canada	4	I want to...
Credit360_Energy Star (credit360_energystar)	CRedit360	1	I want to...



- c) This will bring you to a screen where you can manage Credit 360’s permissions for your buildings. Find the building in question. In the dropdown, select “Edit Contact’s Permissions”

Name	Property Data Administrator	My Permissions	Credit360's Permissions	Action
Light Industrial Test		Property Data Administrator	Exchange Data Shared by BOMA Canada BOMA BEST	I want to... I want to... View Contact's Permissions View My Permissions Edit Contact's Permissions Remove Contact's Access to Property

This table represents all properties that you and Credit360 both share. If you wish, you can remove all of Credit360's access to...

- d) Click on “Edit” on the far right of the screen.

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Light Industrial Test (5859258)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Credit360 Energy Star	<input type="radio"/>				<input checked="" type="radio"/> Edit

Edit Permissions [Cancel](#)

- e) Find the meter that was added after the original synch. Click on “Full Access” for this particular meter (all meters must be Full Access for synching to occur correctly).

Select Access Permissions to [Light Industrial Test](#) for [Credit360 Energy Star](#).

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 Steam	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ Water Meters			
Potable Indoor	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

- f) Scroll down on the pop up screen and click “Apply selections & Authorize exchange”. The information should populate in the BOMA BEST portal within 24 hours.

8. Why does my ENERGY STAR account tell me I’m also connected to Credit360?

Credit360 is the software that manages the BOMA BEST Online Portal. As such, in order to connect your data to your BOMA BEST account, BOMA BEST must have an intermediary connection with Credit360.



9. Where can I obtain more information about sharing properties with ENERGY STAR Portfolio Manager?

Refer to the Portfolio Manager documentation: www.energystar.gov/buildings/tools-and-resources/how-share-data-other-users-portfolio-manager

10. I have more questions about ENERGY STAR and BOMA BEST

Much more information on benchmarking in BOMA BEST is available in the [ENERGY STAR FAQ](#).