

ESPM User Guide

Local Law 97 How-to Guides

MAJOR Changes to Benchmarking



1. **Share Request is required instead of the template approach that has been used the last 10+ years for benchmarking.**
2. **Strict formatting on BBL and BIN. This key information must align with the LL97 CBL to transfer information from ESPM to BEAM. No dashes, slashes, spaces, etc.**
 - Search by BBL on the [LL97 CBL](#) and www.nyc.gov/dobnow.
 - **Standard ID – City/Town: NYC Borough, Block and Lot (BBL)** as it appears on the Covered Buildings List. The BBL should be in **10-digit number format** (NBBBBBLLLL) including any leading zeros for the block and lot with no symbols.
 - Manhattan = 1, Bronx = 2, Brooklyn = 3, Queens = 4, Staten Island = 5
 - A correct BBL entry for a building in **Queens**, with Block: 234, and Lot: 56, would be entered in the NYC Borough, Block and Lot (BBL) field as: **4002340056**.
 - **Campuses:** Use a semi-colon (;) as the separator without any spaces.
Example: **4002340056;4002340057;4002340058**
 - **Standard ID – Other: NYC Building Identification Number (BIN)** in a 7-digit number format (4079215).
 - **Campuses:** Use semi-colon (;) as the separator.
Example: **4079215;4079216;4079217**

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Step 1: Proceed to New Account Page



- To gain access to the ESPM tool, building **owners** must create an Energy Star Portfolio Manager (ESPM) account. Other professionals, including owner's representatives and service providers, must be added to an account later by the building owner.

Step 2: Fill Out Basic Information



- Fill out all basic personal contact, building, and organizational information.
- Each Portfolio Manager account must be associated with the building owner using an active email address, as NYC may reach out for data validation purposes.
- **Note:** The username cannot be changed, so it must be related to, or associated with the **building owner**.

Create an Account

Accessing Your Account

Username: *

Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

Confirm Password: *

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: *

Language:

Reporting Units: ☒ Conventional EPA Units (e.g., kBtu/ft²) ☐ Metric Units (e.g., GJ/m²)

Street Address: *

City/Municipality: *

State/Province: *

Postal Code: *

Step 2: Fill Out Basic Information



- Continued: Fill out organizational information and ensure that your username is searchable. Finalize your account by clicking the "Create My Account" button on the bottom right.

About Your Organization

Organization Name: *

Primary Business or Service of Your Organization: * [Select Primary Business or Service](#)

Is your organization an ENERGY STAR Partner? ☐ Yes ☒ No

Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?

Do you want your username to be searchable by other Portfolio Manager users? You must select "Yes" if you want to [connect](#) with other users to allow automatic upload of utility data or to share properties.

☒ Yes ☐ No

Confirm Your Identity

Please confirm that you are a human

☐ I'm not a robot

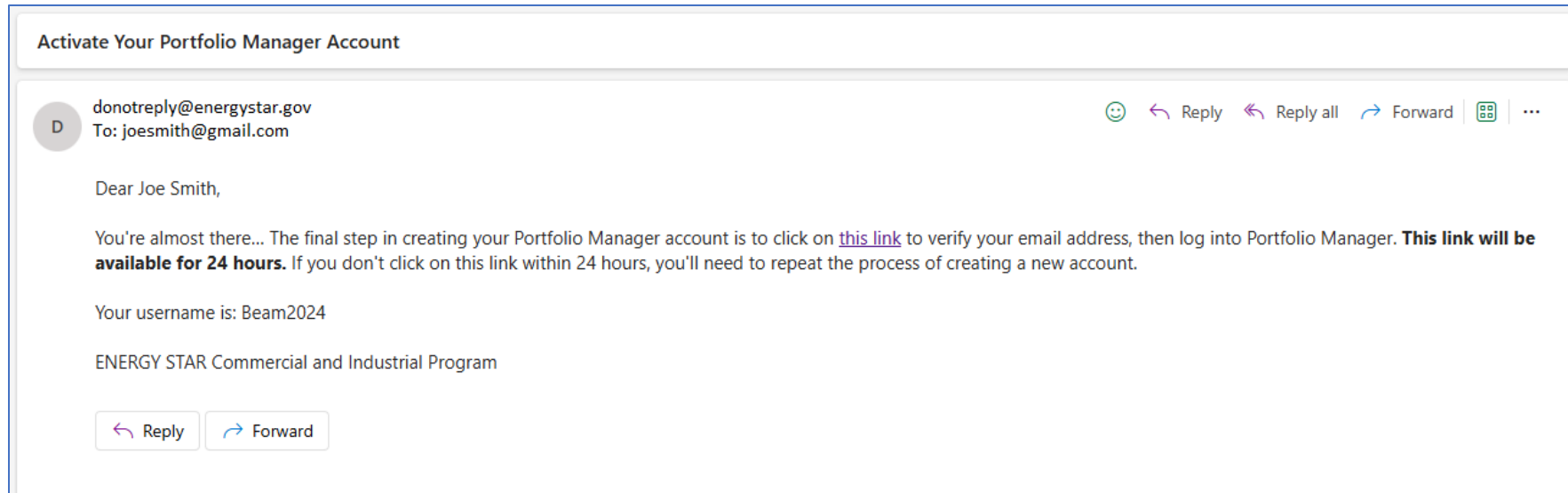
 reCAPTCHA
[Privacy](#) [Terms](#)

[Create My Account](#) [Cancel](#)

Step 3: Activate Account via Email



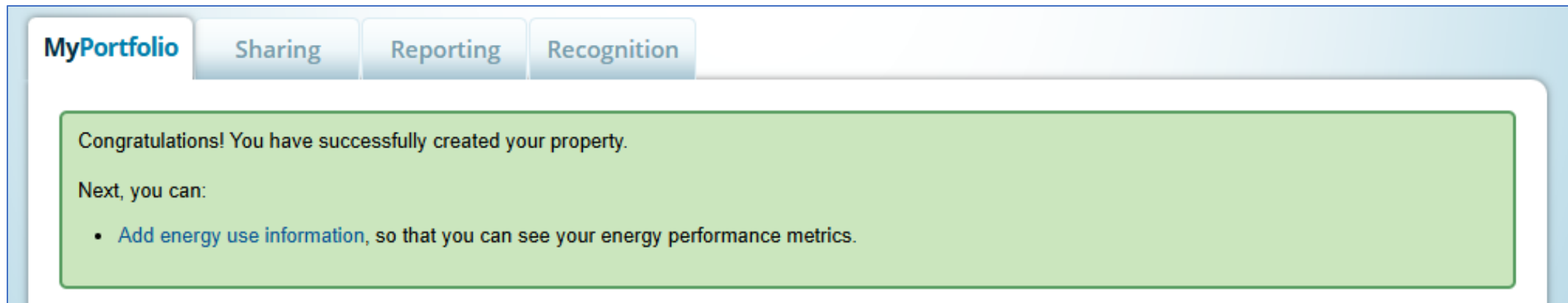
- Check the email used in the previous step and follow the activation link sent from donotreply@energystar.gov.



Step 4: Confirmation of Account Creation

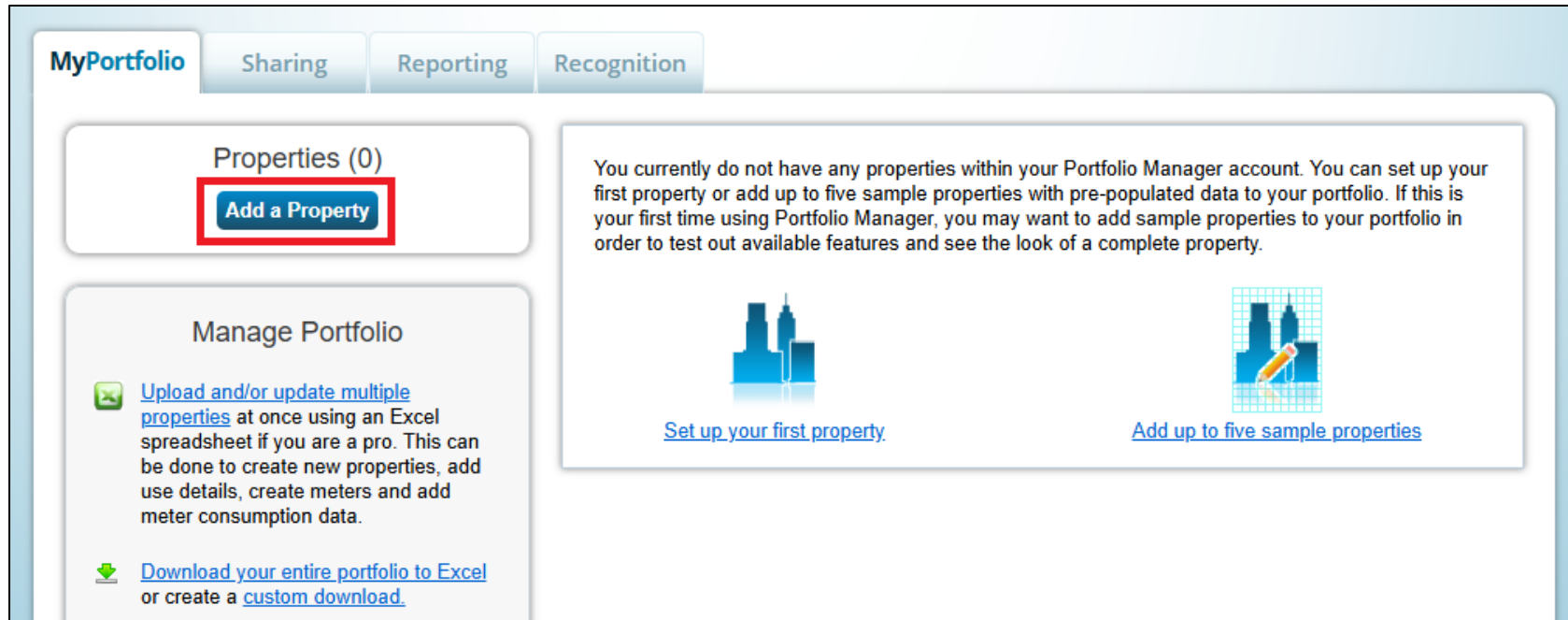


- After you validate the link from your email, you will receive the following notification in ESPM that shows your account is active:



Step 5: Add your Property Details

- Log into Energy Star Portfolio Manager at <https://portfoliomanager.energystar.gov/pm/login> and click **Add a Property** on the MyPortfolio tab.



Step 6: Set Up a Property



Users should follow the guidance below to identify property types in ESPM:

Property Type Requirements:

- Set up your ESPM account to generate a score (you will need to have 50% of your property as a **single property type that is eligible for ENERGY STAR score**).
- If your building does not generate a score, you may be subject to an audit.
- If you wish to add additional property types for your LL97 report, you may do so in BEAM.
- “Mixed Use” or “Other” may not be selected as property type.

Failing to follow the above guidance for entering property types in ESPM may result in a violation for:

- **Failing to generate an ENERGY STAR score**
- AND/OR
- **Failing to file the annual emissions report for Local Law 97 in BEAM.**

If your property is subject to Local Law 97 compliance **you may enter any additional LL97 required property types associated with your building in BEAM**, not ESPM.

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!



Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

[Learn more about Property Types.](#)



Your Property's Buildings

How many physical buildings do you consider part of your property?

☐ None: My property is part of a building (e.g., a Tenant Space)
☐ One: My property is a single building
☐ More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?



Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

☒ Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
☐ Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
☐ Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

[Get Started!](#)[Cancel](#)

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Tip
To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

Tip
Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

Test Properties
You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

Properties with Multiple Use Types

Some properties include multiple-use types, such as restaurants in hotels, salons in senior living communities, and cafeterias in hospitals. As a general rule, if a certain use commonly occurs in the type of property being benchmarked, do not break it out as a separate Property Use Type. Simply include its square footage with the building's primary use.

NYC
Buildings

ESPM User Guide

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Step 6: Set Up a Property



Your Property's Buildings:

- As a general rule, property owners should work to identify building-level data.
- Any building that is separately metered should have a unique property page.
- A property reporting as a campus must input the number of physical buildings under that parent property here.
- Buildings will be required to be reported separately under LL97 beginning in 2030 and must be sub-metered by that time to be considered in compliance with LL97.

Your Property's Construction Status:

- Select existing property.

Click **Get Started!**

Set up a Property: Let's Get Started!

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☐ **Design Project:** My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.

☐ **Test Property:** This is not a real property. I am entering it to test features, or for other purposes such as training.



Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).



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Get Started!

[Cancel](#)

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Properties with Multiple Use Types

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Step 7: Enter Basic Property Information



- Continue to add all **Basic Property Information**, such as the Address, Year Built, Gross Floor Area, and Occupancy.

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name:

Country:

Street Address:

City/Municipality:

County:

State/Province:

Postal Code:

Year Built:

Gross Floor Area: ☐ Temporary Value

Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. [Details on what to include.](#)

Irrigated Area:

Occupancy: %

Property Photo (optional): No file chosen

Select an image file on your computer with the format type of .jpg, .jpeg, .png or .gif; photos will be resized to fit a space of 2.78 inches wide x 2 inches tall.

Step 8: Confirm BBL and BIN Information



1. Confirm the **BBL on your Property Tax Bill** (publicly available at [DOF Property Tax Bill search](#)) matches the **BBL on the LL97 CBL**.

2. Standard ID – City/Town:

- Each BBL should be entered in ESPM as 10-digit number: NBBBBBLLLL
- N is your property's borough represented by a number. Borough numbers are as follows: Manhattan = 1, Bronx = 2, Brooklyn = 3, Queens = 4, Staten Island = 5

- BBBBBB; is the 5-digit Block number with additional leading zeros added to the left as needed

Example: 'Block: 845' = 00845

- LLLL is the 4-digit Lot number with additional leading zeros added to the left as needed

Example: 'Lot: 27' = 0027

- BBL Example: A correct BBL entry for a building in **Queens**, with **Block: 234**, and **Lot: 56**, would be entered in the NYC Borough, Block and Lot (BBL) field as: **4002340056**.

3. Standard ID – Other:

- Once you have entered your BBL, locate your property NYC Building Identification Number (BIN) at www.nyc.gov/dobnow and enter your building 7-digit BIN number.

Example: 4079215

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 - City/Town:
NYC Borough, Block and Lot (BBL) ID: 4002340056

Standard ID - County/District:
ID:

Standard ID - State/Province:
ID:

Standard ID - Other:
NYC Building Identification Number (BIN) ID: 4079215,4079215
[+ Add Another](#)

Step 9: Enter Standard IDs



In the **Standard IDs** section, enter your building's Borough, Block, and Lot (BBL) identifier and NYC Building Identification Number (BIN).

- Select the **Standard ID – City/Town** dropdown and select **NYC Borough, Block and Lot (BBL)**. Enter your property's BBL in the field.
- Select the **Standard ID – Other** dropdown and select **NYC Building Identification Number (BIN)**. Enter your property's BIN in the field.
- Note: These fields should ONLY include numbers. NO letters or special characters should be used, including slashes, dashes, etc.
- Exception: Multiple Standard IDs should be separated by semicolon without any spaces.

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 - City/Town:
NYC Borough, Block and Lot (BBL) ID: 1234567890

Standard ID - County/District:
ID:

Standard ID - State/Province:
ID:

Standard ID - Other:
NYC Building Identification Number (BIN) ID: 1234567 [+ Add Another](#)

Single BIN

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 - City/Town:
NYC Borough, Block and Lot (BBL) ID: 1234567890

Standard ID - County/District:
ID:

Standard ID - State/Province:
ID:

Standard ID - Other:
NYC Building Identification Number (BIN) ID: 1234567; 765432 [+ Add Another](#)

Multiple BINs

Step 10: Select All Applicable Options



- Select any appropriate boxes under **Do any of these apply?** Then, click **Continue**.

Do any of these apply?

- ☐ My property's energy consumption includes [parking](#) areas
- ☐ My property has a [Data Center](#) that requires a constant power load of 75 kW or more
- ☐ My property has one or more retail stores ([that are eligible for a Retail score](#)).
- ☐ My property has one or more restaurants/cafeterias
- ☐ My property has a trading floor

Step 11: Add Property

- On the next page, “Set Up a Property: How is it used?”, enter the Property Use Details, e.g., Operating Hours, which vary by Property Type. Avoid using any default values or temporary values and enter accurate data for your property. **NOTE: Hover the mouse over blue font section names to see a definition of that field.**
- To add another property type, click "Add Another Type of Use" on the top-right, then select a Property Type from the **Add Another Type of Use** dropdown menu. Click **Add**.
- Enter Use Details for the property, and then click **Save Use**.
- You may also do this step after creating your building by clicking the property’s **Details** tab.
- Click **Add Property**. Once you have successfully added your property, you will see the property’s **Summary** tab.

Add Another Type of Use

Add

Building Use

Edit Name

Museum refers to buildings that display collections to outside visitors for public viewing and enjoyment and for informational/educational purposes.

Gross Floor Area (GFA) should include all space within the building(s), including but not limited to public collection display areas, meeting rooms, restrooms, classrooms, gift shops, food service areas, administrative/office space, mechanical rooms, storage areas for collections, libraries, elevator shafts, stairwells and movie theatre space inside the museum. Do not include any outside space in the GFA, such as outdoor exhibits, open-air theaters, walkways, and landscaped areas.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	Sq. Ft. ▾	1/1/1846 	☐
Weekly Operating Hours		1/1/1846 	☐
Number of Workers on Main Shift	☐ Use a default	1/1/1846 	☐
Number of Computers		1/1/1846 	☐
Precision Controls for Temperature and Humidity	☐ Use a default	1/1/1846 	☐
Gross Floor Area that is Exhibit Space	Sq. Ft. ▾ ☐ Use a default	1/1/1846 	☐
Percent That Can Be Heated	☐ Use a default	1/1/1846 	☐
Percent That Can Be Cooled	☐ Use a default	1/1/1846 	☐

Back

Add Property

Cancel

Step 12: Complete your Profile

- Once you add all your **Property Use Details**, you can click the **Add Property** button to finish your profile.

Add Another Type of Use

Add

▼ Building Use

Edit Name

Museum refers to buildings that display collections to outside visitors for public viewing and enjoyment and for informational/educational purposes.

Gross Floor Area (GFA) should include all space within the building(s), including but not limited to public collection display areas, meeting rooms, restrooms, classrooms, gift shops, food service areas, administrative/office space, mechanical rooms, storage areas for collections, libraries, elevator shafts, stairwells and movie theatre space inside the museum. Do not include any outside space in the GFA, such as outdoor exhibits, open-air theaters, walkways, and landscaped areas.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	Sq. Ft. ▼	1/1/1846 	☐
Weekly Operating Hours		1/1/1846 	☐
Number of Workers on Main Shift	☐ Use a default	1/1/1846 	☐
Number of Computers		1/1/1846 	☐
Precision Controls for Temperature and Humidity	☐ Use a default	1/1/1846 	☐
Gross Floor Area that is Exhibit Space	Sq. Ft. ▼ ☐ Use a default	1/1/1846 	☐
Percent That Can Be Heated	☐ Use a default	1/1/1846 	☐
Percent That Can Be Cooled	☐ Use a default	1/1/1846 	☐

Back

Add Property

Cancel

Utility Web Services: Add Meters and Enter Utility Data



Whole building energy and water data can be automatically uploaded to the ESPM account by most utilities. Building owners must request whole building energy consumption data directly from the utility companies. Doing so will relieve you from obtaining usage information from individual tenants.

Consolidated Edison, Inc. (Con Edison) - [Visit](#)

- [User Guide](#)
- Contact Information: citybenchmarking@coned.com

National Grid - [Visit](#)

- [User Guide](#)
- [National Grid FAQs](#)
- Contact Information: energyefficiency@nationalgrid.com

NYC Department of Environmental Protection (DEP)

- [User Guide](#)
- Contact Information: waterbenchmarking@dep.nyc.gov.
- **NOTE:** DEP data is only required when a property is marked as "required to report water" on the Local Law 84 Covered Building List.

Manual Entry: Add Meters and Enter Utility Data



- If you are unable to receive energy use from the utilities, then you may upload data manually. Click on your property from your dashboard on the **MyPortfolio** tab, then, select the **Energy** tab and click **Add a Meter**.

The screenshot displays the Energy Star Portfolio Manager interface. On the left, the 'MyPortfolio' tab is active, showing a 'Properties (1)' section with an 'Add a Property' button. Below this is a 'Source Energy Use Trend (kBtu)' chart. The main dashboard area shows a table of properties with columns for Name, Energy Current Date, ENERGY STAR Score, Site EUI (kBtu/ft²), and Source EUI (kBtu/ft²). The first row, labeled 'Office' with ID 37471380, is highlighted with a red box. To the right, the 'Office' property details are shown, including the address '280 Broadway, New York City, NY 10007' and a 'Weather Normalized Source EUI (kBtu/ft²)' of 0.3. The 'Energy' tab is selected, showing a 'Meter Summary' section with a red box around the 'Add a Meter' button. A message from Consolidated Edison is also visible, encouraging users to connect their utility for automatic data entry.

Manual Entry: Add Meters and Enter Utility Data



- Select the type of utility used, and the number of meters to create, then click **Get Started!**
 - Make sure to include all fuel types for your building. For example, if you have a diesel generator that has delivered fuel, you will record this as a “Meter” to track your deliveries over time. All energy types used in your building must be entered.

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Settings Notifications

Get Started Setting Up Meters for Office

There are five ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. Fourth, you can [hire a company to update your data electronically](#). And finally, you can see if your [utility offers the service to update your energy data automatically](#).



Sources of Your Property's Energy

What kind of **energy** do you want to track? Please select all that apply.

- ☐ Electric
- ☐ Natural Gas
- ☐ Propane
- ☐ Fuel Oil (No. 2)
- ☐ Diesel
- ☐ District Steam
- ☐ District Hot Water
- ☐ District Chilled Water
- ☐ Fuel Oil (No. 4)
- ☐ Fuel Oil (No. 5 and No. 6)
- ☐ Coal (anthracite)
- ☐ Coal (bituminous)
- ☐ Coke
- ☐ Wood
- ☐ Kerosene
- ☐ Fuel Oil (No. 1)
- ☐ Other:



Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.



Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More.](#)



Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. [Learn more.](#)

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Manual Entry: Add Meters and Enter Utility Data



- On the **About Your Meters** page, click to select the type of units your meter uses and the date the meter became active. **Note:** Please be sure to select the correct unit for each fuel type.
 - If this meter reflects a bulk fuel purchase for an energy meter, select the **Enter as Delivery?** checkbox.
 - Click **Create Meters**.

About Your Meters for NYC Office

Enter the information below about your new meters. The meter's **Units** and **Date Meter became Active** are required. You can also change the meter's name.

2 Energy Meters for NYC Office (click table to edit)

☐	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom Met ID 1 Name
☐	Natural Gas	Natural Gas		ccf (hundred cubic feet)	01/01/2024	☒		☐	
☐	Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	01/01/2024	☒		☐	

[X Delete Selected Entries](#)
[+ Add Another Entry](#)

[Back](#) [Create Meters](#) [Cancel](#)

Manual Entry: Add Meters and Enter Utility Data



- Select the meters that total your property's energy or water use on the **Select Meters to Include in Metrics** page. Click **Apply Selections**.

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MyPortfolio | Sharing | Reporting | Recognition

Your meters have been created! Please indicate below if these meters should be included in your property's metrics.

Select Meters to Include in Metrics

Tell us which meters to include when calculating the metrics for [Office](#) so that we can provide you with the most accurate metrics possible.

Summary

2

Meters representing the total energy consumption for [Office](#) (a single building).

Energy Meters

Select all meters to be included in your metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

☐	Name Meter ID	Type
☒	Natural Gas 231645174	Natural Gas
☒	Electric Grid Meter 231645175	Electric - Grid

Total of 2 meter(s). Tell us what this represents:

☒ These meter(s) account for the total energy consumption for [Office](#) (a single building).

☐ These meter(s) do not account for the total energy consumption for [Office](#) (a single building).

Apply Selections

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Manual Entry: Add Meters and Enter Utility Data



- Click the blue arrow next to each meter to expand the section on the **Meter Entries** page.
- Select **Click to add an entry** under the meter and enter the Start Date, End Date, and Usage. You may also choose to record the Total Cost here, too, but you are not required to do so.
- Once you're finished adding entries, click **Save Bills**.

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Manage Bills (Meter Entries) for [Office](#)

Meter Selection: Natural Gas - 231645174

Basic Meter Information (***click on the arrow to the left to expand this section)

Monthly Entries

Display Year(s): Show All Years X

	Start Date	End Date	Usage ccf (hundred cubic feet)	Total Cost (\$)	Estimation	Last Updated
Click to add an entry						
Delete Selected Entries						
Add Another Entry						
Learn how to copy/paste						
Delete ALL Meter data for this meter						

Upload data in bulk for this meter:

Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

Choose File No file chosen Upload

Save Bills Cancel

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Excel Spreadsheet Uploads: Add Meters and Enter Utility Data



Energy usage can be uploaded to Portfolio Manager using an Excel spreadsheet template. To upload an energy usage spreadsheet, follow the steps below.

- Navigate to the **Energy tab** of the property you would like to upload data to. Select the meter that the data corresponds to.
- On the **Manage Bills (Meter Entries)** page, click the single-meter spreadsheet hyperlink to download a spreadsheet template to use for uploading.
- Populate the downloaded spreadsheet with the building's energy usage. Start Date, End Date, and Usage values are required. Be sure to keep existing spreadsheet formatting consistent.

	A	B	C	D	E	F	G
1	Start Date (Required)	End Date (Required)	Usage (Required)	Cost (Optional)	Estimation (Optional)	Demand (Optional)	Demand Cost (Optional)
2							
3							
4							
5							
6							
7							
8							
9							
10							

Excel Spreadsheet Uploads: Add Meters and Enter Utility Data



- On the meter entries page, click **Choose File**. Select the file you would like to upload from your computer library. Then, click **Upload**.
- The table will populate with the data from your spreadsheet. Confirm that the Start and End dates, Usage values, and Units are correct.

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Settings Notifications

Manage Bills (Meter Entries) for [Office](#)

Meter Selection: Natural Gas - 231645174

Basic Meter Information (**click on the arrow to the left to expand this section)

Monthly Entries

Display Year(s): [Show All Years](#)

Start Date	End Date	Usage ccf (hundred cubic feet)	Total Cost (\$)	Estimation	Last Updated
Click to add an entry					

[Delete Selected Entries](#)
[Add Another Entry](#)
[Learn how to copy/paste](#)
[Delete ALL Meter data for this meter](#)

Upload data in bulk for this meter:

Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

[Choose File](#) No file chosen [Upload](#)

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

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Critical Information for ESPM



- If your building has benchmarked in the past all Energy Star Portfolio Manager (ESPM) requirements are the same, except for **new modifications** for **standard IDs** formatting (inclusion of BIN) and method of reporting (**property sharing**).
- All Benchmarking requirements will remain in place for buildings that must **comply with Local Law 84** of 2009 (LL84) **and** Local Law 97 of 2019 (LL97). When adding property types in ESPM please continue to follow ESPM reporting guidelines for benchmarking. **BEAM has the option to break out property types more granularly for Local Law 97.**
- The **Property Data Administrator email** for your ESPM account should be the **building owner's email** when creating an ESPM account. If your account is already created on ESPM, we recommend that the **email be changed to the owner's.**
- ESPM data is pulled over from BEAM by BBL and BIN on a nightly basis.
- **Please plan ahead and allocate enough time to submitting a LL97 or LL88 report, as there are data exchanges that will prevent reporting from being done in one day.**

ESPM Connection: Connect with NYC DOB



Part 1: Connect with NYC DOB on ESPM

Welcome lydiashapiro: Account Settings | **Notifications** | ENERGY STAR Notifications | **Contacts** | Help | Sign Out

1. Log in to your ESPM account by [clicking here](#)
2. Click on **Contacts** in the upper right corner. Click on **Add New Contacts/Connections**.
3. Enter **NYCGOVLL84** as the username and search. Click **Connect**.
4. Once your connection request is accepted, you will receive an email with the subject “**Account Share Accepted.**” You will also see a **notification** in the top-right corner.

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.

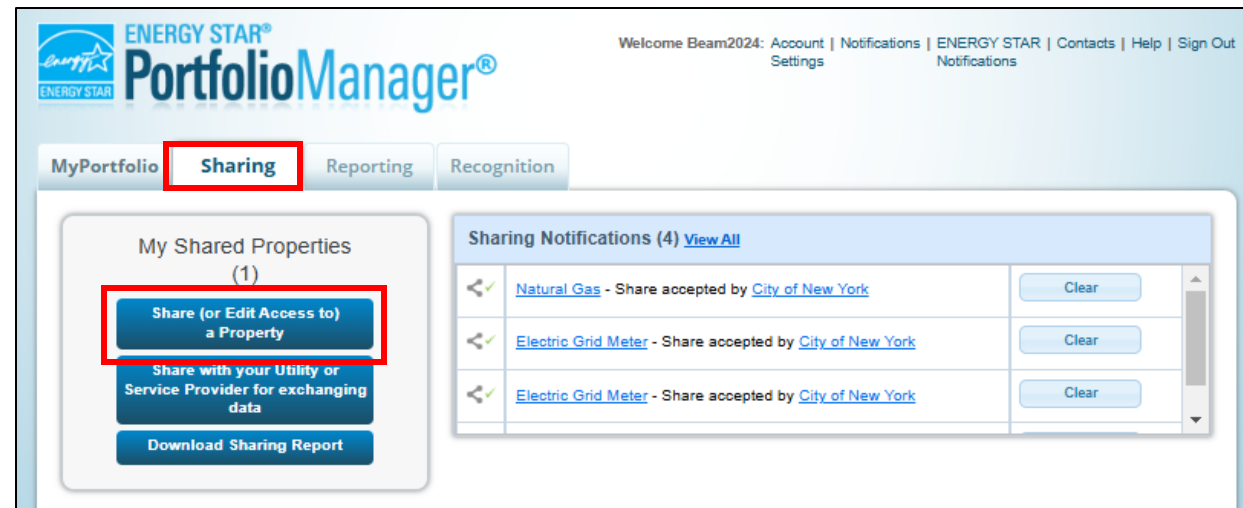
Your Search Criteria	City of New York (NYCGOVLL84) Department of Buildings with City of New York	Connect
Name:	Page 1 of 1	50
Organization:		
Username: NYCGOVLL84 		
Email Address:		
Search		

ESPM Connection: Share Property

Part 2: Share your property

Sharing your account does not mean that you are finished submitting energy use data. Now that your account is connected, the next step is to share your property.

- Go to the **Sharing** tab in Portfolio Manager.
- Click **Share (or Edit Access) to a property**.



ESPM Connection: Share Property

- Click on **Select Property(ies)**; a pop-up window with a list of properties will appear. Select the properties you'd like to share, then click **Apply Selection**.

- Please note:** If you are sharing a campus with multiple buildings, be sure to share both the parent property and all child buildings associated with the campus.

Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.



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?

Select Properties

Selected Properties: 0



Sharing with Accounts

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Contacts" page and search for them under "Add Contact" or "Add Organization" (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. When they accept your

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?

Search:

Selected Properties: 0 [View Selection](#)

☐	Name	Part of Larger Property	Property Type	State/Province
☐	SBC	Not Applicable: Single Building	Parking	NY
☐	Building 1	Howard	Multifamily Housing	NY
☐	Building 2	Not Applicable: Single Building	Multifamily Housing	NY
☐	Building 3	Not Applicable: Single Building	Multifamily Housing	NY
☐	Building 3	Not Applicable: Single Building	Multifamily Housing	NY
☐	Building 3	Not Applicable: Single Building	Multifamily Housing	NY
☐	Howard	Howard	Multifamily Housing	NY
☐	Midtown	Not Applicable: Single Building	Data Center	NY
☐	Property	Not Applicable: Single Building	Bank Branch	NY
☐	None	Not Applicable:	Detail Store	NY

Filter Properties (11)

Filter by Group [Create New Group](#)

☐ Campus (3)

Filter by Property Type

☐ Bank Branch (1)

☐ Data Center (1)

☐ Financial Office (1)

Filter by Construction Status

☐ Existing (5)

☐ Test (6)

Filter by State/Province

☐ New York (11)

Filter by Shared from

☐ None - My Properties (PDA) (11)

First Previous Page 1 of 1 Next Last 100

Selected Properties: 0 [View Selection](#)

Apply Selection [Cancel](#)

ESPM Connection: Share Property



- Under **Select People (Accounts)** click/highlight **City of New York (NYCGOVLL84)** as the recipient.
- Under **Choose Permissions**, select **Personalized Sharing & Exchange Data ("Custom Orders")**, then click **Continue**.

Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.

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?

[Select Properties](#)

[Selected Properties:](#) 0

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:

City of New York (NYCGOVLL84)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your [connected contacts](#) appear in this list.

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](#)

Sharing with Accounts

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Contacts" page and search for them under "Add Contact" or "Add Organization" (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. When they accept your connection request, they will show up on the list to the left.

Exchanging Data with Web Service Providers?

If you need to share your property(ies) with a Web Service Provider or Utility, use the ["Set Up Web Services/Data Exchange"](#) page.

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.

ESPM Connection: Share Property

- In the **Sharing** tab, select **Read Only Access** and **Exchange Data** for each property. A pop-up window will appear and allow you to specify the following permission levels per property:
 - Select **Read Only Access** for **Property Information** and **All Meter Information**.
 - Select **None** for **Goals, Improvements, & Checklists** and **Recognition**.
 - Select **No** for **Share Forward**
 - Click **Apply Selections & Authorize Exchange**.

Sort by: Property Name ▼

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Office (37471380)	☐	☒	☐		
City of New York	☐				☒ 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](#)

Select Access Permissions to [Office](#) for [City of New York](#).
The following information is required by [City of New York](#) in order to provide service to your property(ies).
Select the permission level below that you would like to grant [City of New York](#) for each category.

Item	None	Read Only Access	Full Access
Property Information	☐	☒	☐
▼ All Meter Information			
▼ Energy Meters			
Electric Grid Meter	☐	☒	☐
Goals, Improvements, & Checklists	☒	☐	☐
Recognition	☒	☐	☐

Additional Options:

Item	Yes	No
* Share Forward Allow City of New York to share this property with others and give them any permissions that he/she has, including the right to share with more people.	☐	☒

[Apply Selections & Authorize Exchange](#) [Cancel](#)

ESPM Connection: Share Property



- Once you've completed **Exchange Data** access for each property, click **Share Property(ies)**. DOB will then need to approve your share request.
- You will receive a **confirmation email within an hour** once the property share request has been accepted. If you do not receive an email, please check your "Spam" or "Junk" folder.

Sort by: Property Name ▼

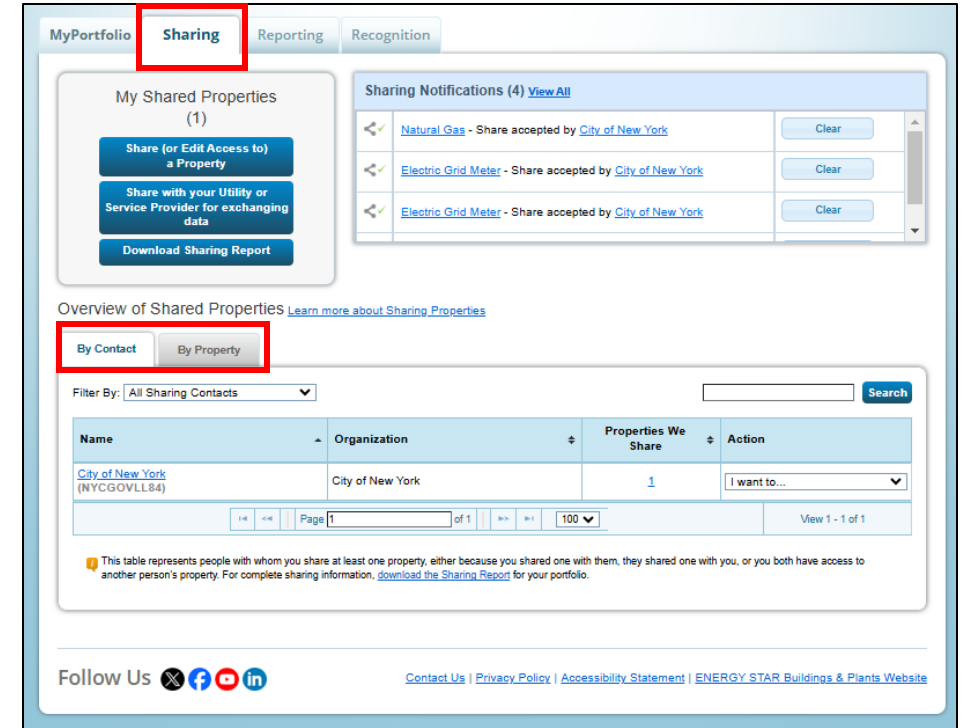
Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Office (37471360)					
City of New York	☐	☒	☐		☒ Edit

 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](#)

Manage Shared Properties

- Click on the **Sharing** tab to review/manage Sharing details:
 - View sharing requests in the **Sharing Notifications** section.
 - Manage your **Shared Properties** either **By Property** or **By Contact**.
 - Every user who has access to a property will be able to see the name of all other users who have access, regardless of their permission levels.



The screenshot shows the 'MyPortfolio' interface with the 'Sharing' tab selected. The 'Sharing' tab is highlighted with a red box. Below the tabs, there are two main sections: 'My Shared Properties (1)' and 'Sharing Notifications (4) View All'. The 'My Shared Properties' section has three buttons: 'Share (or Edit Access to) a Property', 'Share with your Utility or Service Provider for exchanging data', and 'Download Sharing Report'. The 'Sharing Notifications' section shows a list of notifications with columns for status, description, and a 'Clear' button. Below these sections is the 'Overview of Shared Properties' section, which has two tabs: 'By Contact' and 'By Property'. The 'By Contact' tab is selected and highlighted with a red box. Below the tabs, there is a 'Filter By' dropdown set to 'All Sharing Contacts' and a 'Search' button. A table displays the shared properties with columns for Name, Organization, Properties We Share, and Action. The table shows one entry for 'City of New York (NYCGOVLL84)' with 'City of New York' as the organization and '1' as the number of properties shared. The 'Action' column has a dropdown menu with 'I want to...' selected. Below the table, there is a pagination bar showing 'Page 1 of 1' and a 'View 1 - 1 of 1' link. At the bottom, there is a footer with 'Follow Us' and social media icons, and a link to 'Contact Us | Privacy Policy | Accessibility Statement | ENERGY STAR Buildings & Plants Website'.

MyPortfolio **Sharing** Reporting Recognition

My Shared Properties (1)

Share (or Edit Access to) a Property

Share with your Utility or Service Provider for exchanging data

Download Sharing Report

Sharing Notifications (4) [View All](#)

Natural Gas - Share accepted by [City of New York](#) Clear

Electric Grid Meter - Share accepted by [City of New York](#) Clear

Electric Grid Meter - Share accepted by [City of New York](#) Clear

Overview of Shared Properties [Learn more about Sharing Properties](#)

By Contact **By Property**

Filter By: All Sharing Contacts Search

Name	Organization	Properties We Share	Action
City of New York (NYCGOVLL84)	City of New York	1	I want to...

Page 1 of 1 View 1 - 1 of 1

This table represents people with whom you share at least one property, either because you shared one with them, they shared one with you, or you both have access to another person's property. For complete sharing information, [download the Sharing Report](#) for your portfolio.

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