



Share Your Energy Management Progress with BOMA International

BOMA International recognized early on the need to make commercial buildings more energy efficient and has rolled out several programs to help our members achieve this goal. A critical step in these programs is benchmarking your commercial building's energy performance using EPA ENERGY STAR's Portfolio Manager and sharing your building's data with BOMA International. By sharing your energy management progress and leadership with BOMA, you will help us to highlight our industry's dedication to reducing greenhouse gas emissions.

Throughout your career, BOMA has managed your confidential operating expense data with the Experience Exchange Report. As your trusted partner, we will continue to apply the same confidentiality standards to your ENERGY STAR data.

How to Share your facilities with BOMA International Establish a user account in Portfolio Manager

Go to www.energystar.gov/benchmark and login to Portfolio Manager. If you do not have a user account in Portfolio Manager, click the New User link on the Portfolio Manager login page and follow the instructions. Enter your building(s) information and begin tracking energy performance with Portfolio Manager.

Get Started:

From the My Portfolio page, choose "Share Facilities"

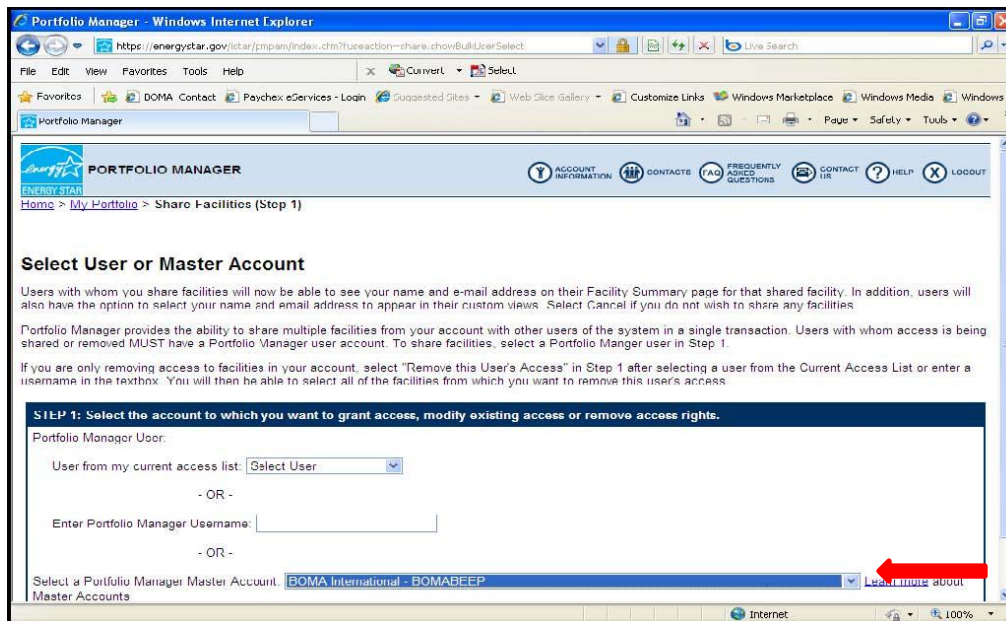
The screenshot shows the ENERGY STAR Portfolio Manager interface. The top navigation bar includes links for ACCOUNT INFORMATION, CONTACTS, FREQUENTLY ASKED QUESTIONS, CONTACT US, HELP, and LOGOUT. The main content area is titled "My Portfolio" and displays "Portfolio Averages" for 2 facilities. The baseline rating is 44 and the current rating is 48, with a change from baseline of -2.0% in adjusted energy use. A table below shows the following data:

Facility Name	Current Rating (1-100)	Change from Baseline: Adjusted Energy Use (%)	Total Floor Space (Sq. Ft.)	Energy Use Alerts	Current Energy Period Ending Date	Eligibility for the ENERGY STAR	Last Modified

The interface also includes a search bar for facility names, a "Download in Excel" button, and a "Share Facilities" link in the "Work with Facilities" section.

Step 1:

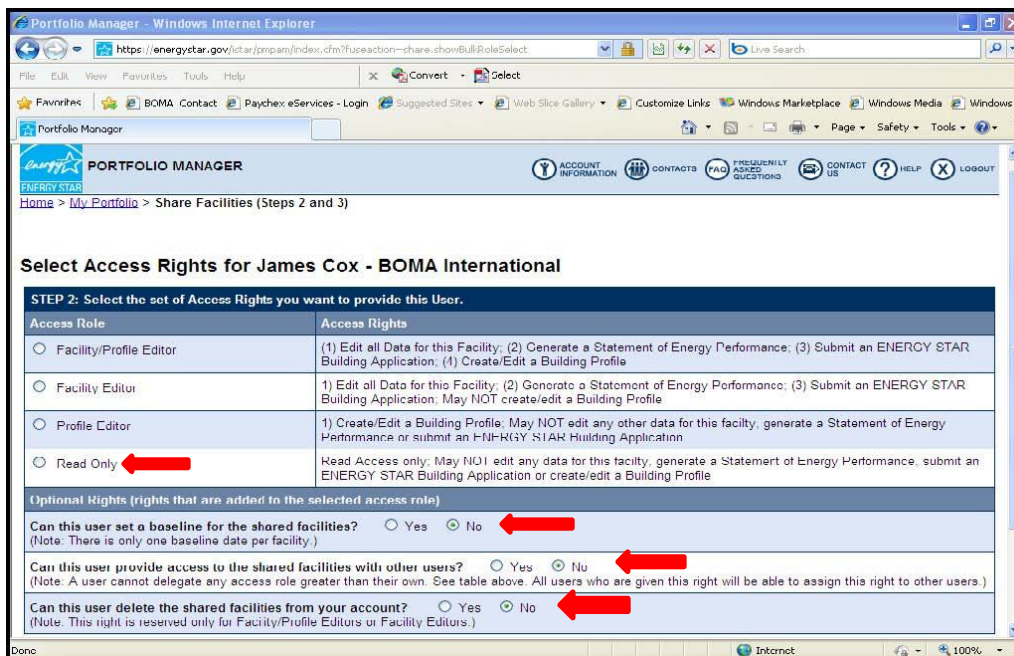
From the drop down menu labeled “Select a Portfolio Manager Master Account”, look for BOMA International/BOMABEEP and select it from the Master Account Registry. Click CONTINUE.



Step 2:

Select the access role “Read Only” and “No” for all optional rights.

Note: Sharing your account with BOMA International will only allow access to your account for you and the BOMA International Account holder, not for others who share with the BOMA International account.



Step 3:

If appropriate, choose the Facility Group within the BOMA International/BOMA BEEP Account. Click CONTINUE.

The screenshot shows the 'STEP 2: Select the set of Access Rights you want to provide this user.' section of the Portfolio Manager interface. It includes a table of access roles and their corresponding rights, followed by optional rights settings. A red arrow points to the 'Main Portfolio' dropdown menu in the 'STEP 3: Specify the group from this user's account to place the shared facility(ies)' section.

Access Role	Access Rights
<input type="radio"/> Facility/Profile Editor	(1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; (4) Create/Edit a Building Profile
<input type="radio"/> Facility Editor	1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; May NOT create/edit a Building Profile
<input type="radio"/> Profile Editor	1) Create/Edit a Building Profile; May NOT edit any other data for this facility, generate a Statement of Energy Performance or submit an ENERGY STAR Building Application
<input type="radio"/> Read Only	Read Access only; May NOT edit any data for this facility, generate a Statement of Energy Performance, submit an ENERGY STAR Building Application or create/edit a Building Profile

Optional Rights (rights that are added to the selected access role)

Can this user set a baseline for the shared facilities? Yes No
(Note: There is only one baseline date per facility.)

Can this user provide access to the shared facilities with other users? Yes No
(Note: A user cannot delegate any access role greater than their own. See table above. All users who are given this right will be able to assign this right to other users.)

Can this user delete the shared facilities from your account? Yes No
(Note: This right is reserved only for Facility/Profile Editors or Facility Editors.)

STEP 3: Specify the group from this user's account to place the shared facility(ies). [Learn more](#) about sharing into groups.

Main Portfolio

CANCEL CONTINUE

Step 4:

Select the Facilities to share with BOMA International. You may select all or some of your facilities to share by checking the box to the left of the facility. Click CONTINUE.

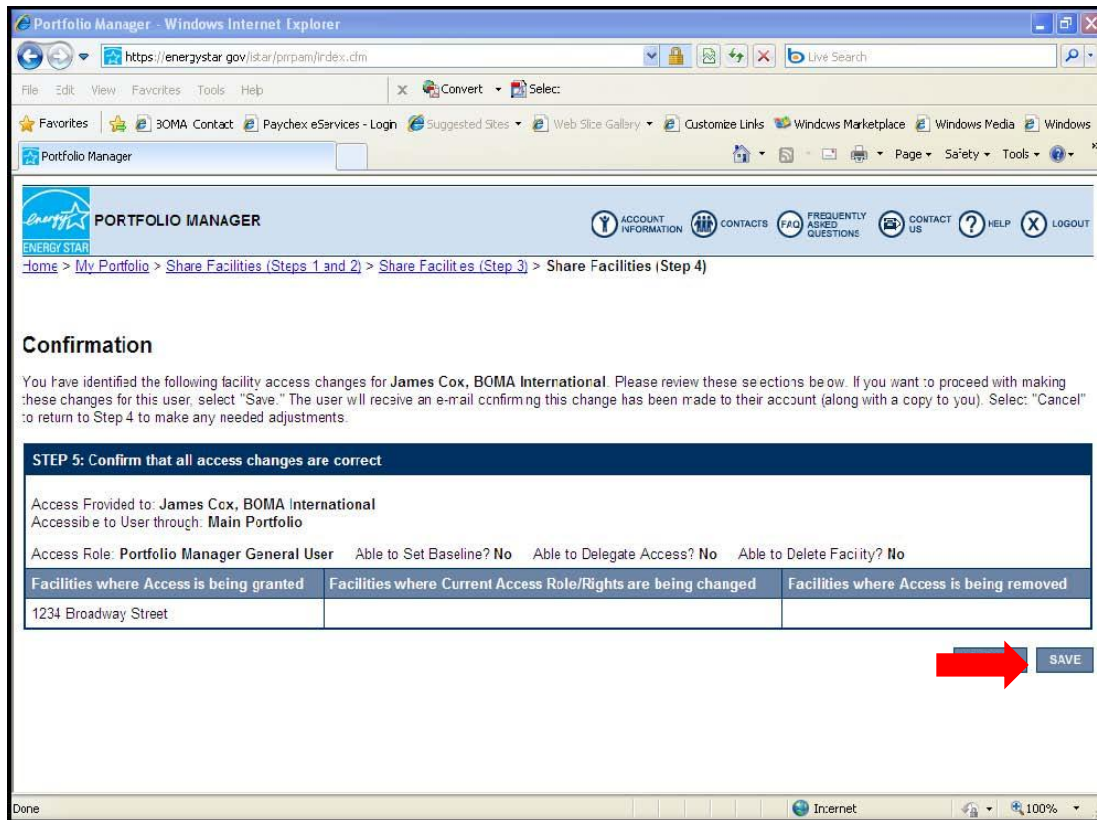
The screenshot shows the 'STEP 4: Select all facilities in your account that you would like to share with James Cox.' section of the Portfolio Manager interface. It displays a table with columns for 'Select Facilities to Share', 'Facility Name', 'Current Access Level', 'New Access Level', and 'Optional Rights'. A red arrow points to the checkbox in the 'Select Facilities to Share' column for the facility '1234 Rimadway Street'.

Select Facilities to Share (uncheck to Remove Access)

Select Facilities to Share	Facility Name	Current Access Level		New Access Level	
<input type="checkbox"/> select all		Access Role (provided by)	Optional Rights	Access Role	Optional Rights
<input type="checkbox"/>	1234 Rimadway Street	None	None	Portfolio Manager General User	Set Baseline? No

Step 5:

Confirm that all access changes are correct. Review the list of facilities shared and access privileges granted. If facilities or access changes are incorrect, you may return to the previous screen(s) by selecting CANCEL. Once you have reviewed the changes, click SAVE.



After Sharing

Continue to update your facility information.

As you input new information for your facility(ies) into Portfolio Manager, the BOMA International/BOMA BEEP Account holder will be able to track the performance of your facility(ies)/portfolio and recognize your successes.

Apply for recognition from BOMA and EPA.

Continue to use Portfolio Manager to track your facilities' energy performance and demonstrate improvements over time.

Your facility(ies) may be eligible to receive the ENERGY STAR label and the BOMA International 360 designation. If you have any questions, please contact benchmarking@boma.org.