

Asset Score Data Entry: Import building data from ESPM

ENERGY STAR Portfolio Manager (ESPM) users may import basic building information via a link in the Asset Scoring Tool to avoid repetitive data entry. *Note: Presently, there are only a limited amount of inputs that are common between ESPM and Asset Score, and only the building name, address, use type, gross floor area, and year of construction may be imported. We hope to expand the capability to import additional inputs in the future.*

Select the 'Import Buildings' link from the 'Building' pull down list on the menu bar to display a table of any buildings that have been shared with your Asset Score account from an ESPM account. Asset Score will only display and attempt to import buildings that have been given permission to share in ESPM.

To give permission to share in ESPM:

1) Add Asset Score to your list of contacts in an ESPM account

- a. Select the Contacts link from the top of the screen
- b. Enter 'asset score' and select the 'Search for new contacts' button
- c. Select the 'Connect' button next to 'Building Energy Asset Score Tool' when it appears
- d. Enter the email address of your Asset Score account, and check the 'Agreement' box
- e. Select the 'Send Connection Request' button

2) Wait for approval. View the connection request in the Notifications box of the My Porfolio page. Verification and acceptance should be given within one minute. Refresh the screen for request updates.

3) Share buildings with Asset Score

- a. Select the Sharing tab
- b. Select the Share a property button
- c. Select one, multiple, or all properties from the Select Properties pull down menu, and choose a property(ies)
- d. Select 'Building Energy Asset Score Tool' from the list of contacts
- e. Select 'Personalized Sharing' then the 'Continue' button
- f. Select the 'Exchange Data' radio button
- g. Select Full Access for all radio button options
- h. Select 'Yes' for Share Forward, then the 'Apply Selections' button
- i. Select the Share Property(ies) button

4) Wait for approval. View the connection request in the Notifications box of the My Porfolio page. Verification and acceptance should be given within one minute. Refresh the screen for request updates.

Import buildings into Asset Score:

Once a sharing request has been accepted in ESPM, log in to (or return to) Asset Score and open or refresh the Import Buildings page, and your buildings(s) should then be visible and available to import.

Select a building or buildings for import and choose a building type and assessment type from the pull down menus, and select the 'Import' button. Return to the Buildings page to view and/or edit the newly imported building(s).