

Portfolio Manager[®] 101



- Hello everyone and welcome to today's ENERGY STAR webinar, "Portfolio Manager 101," which will provide an overview of the tool. Thank you for joining us.



Learning Objectives

In this session, you will become familiar with EPA's ENERGY STAR Portfolio Manager tool and learn how to:

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Analyze progress using performance documents, charts and graphs and reports

Note: ENERGY STAR also has short 5 minute videos on these introductory topics available for quick view at www.energystar.gov/buildings/training

- Today we will demonstrate the core functionality of Portfolio Manager. You will learn all of the essential "how to" information you need to get up and running with Portfolio Manager, so you can start to track your buildings' energy, water, and waste & materials performance.
- Learning objectives include: how to navigate Portfolio Manager, how to add a single property and enter details, how to enter energy, water, and waste & materials data, and how to generate reports and track progress.
- Note that we have short 5 minute videos on many of these basic steps to using Portfolio Manager available at www.energystar.gov/buildings/training. These videos include "How to Set Up a Property in Portfolio Manager" and "How to Set Up Energy, Water, and Waste Meters in Portfolio Manager".

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ENERGY STAR®
PortfolioManager® Understand whole building use and cost for
 1 Energy 2 Water 3 Waste & Materials
 for all commercial spaces

Management Tool

- Compare, measure and track over time
- Set baselines, goals and targets
- Identify under performers
- Track the impact of management strategies
- Create custom reports and charts
- Share data with others
- Apply for ENERGY STAR certification
- Save energy and water + reduce waste = avoid \$

Metrics Calculator


- More than 300 metrics for all bldg. types
- Energy (source, site, weather normalized etc.)
- ENERGY STAR 1-to-100 score (for many building types)
- Greenhouse gas emissions (indirect, direct, total, avoided)
- Green power
- Water (indoor, outdoor by type)
- Waste & materials (trash, recycling, compost etc.)

Free, online secure platform:
www.energystar.gov/portfolio manager

EPA

- EPA’s ENERGY STAR, measurement and tracking tool, Portfolio Manager, is a free, online, secure resource for gaining valuable perspective about whole building energy and water consumption and waste and materials and costs for all types of commercial properties. Access Portfolio Manager via the URL shown on the slide – www.energystar.gov/portfolio manager.
- Portfolio Manager helps to organize and inform your resource management strategy. Use it for all commercial properties to compare, measure and track energy water and waste over time, to set baselines, goals and targets, and set investment priorities by identifying under performing buildings. Resources are limited and the tool can help you be strategic in how you allocate them to get the greatest benefit from your energy and other projects and also track the impact of the projects and management strategies.
- Portfolio Manager comes replete with a standard and custom reporting feature and these reports and charts can be shared with other Portfolio Manager users along with your Portfolio Manager building records, should you want to share benchmarking duties with your co-workers, for example.
- Part of any good energy management strategy is to acknowledge and reward accomplishments. Certain property types are eligible for special recognition through ENERGY STAR Certification when you use Portfolio Manager.
- However, the ENERGY STAR Score is only 1 of over 300 hundred metrics to measure performance, such as source, site and weather normalized energy use and energy use intensity. Greenhouse gas emission and green power metrics associated with energy purchases and production are also available. For water, Portfolio Manager tracks indoor and outdoor water by type, for example, municipally supplied water and alternative water. For waste and materials, 29 different types of waste and their disposal methods can be tracked, for example, trash, recycling and compost.
- Bottom line: Portfolio Manager is both a management tool and a metrics calculator for tracking and benchmarking any building’s energy, water, and waste, which can help identify areas to save and avoid unnecessary spending.

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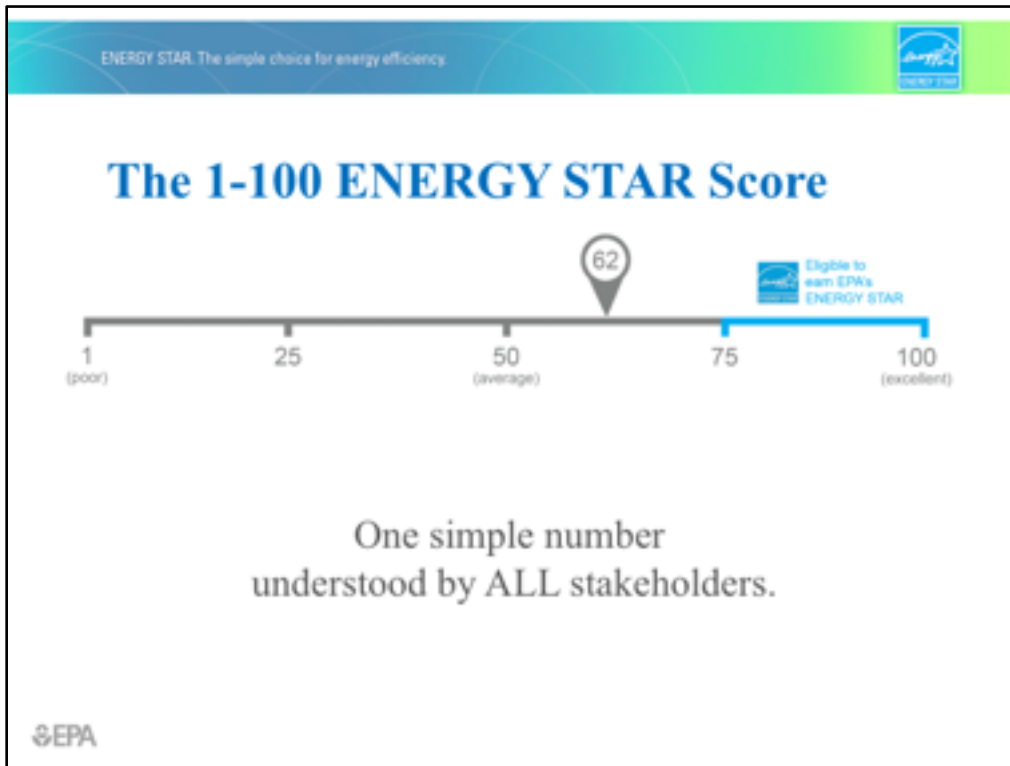


Benchmarking is the process of comparing use to gain valuable perspective about building performance

Use Portfolio Manager to:	Energy	Water	Waste & Materials
Set baseline	✓	✓	✓
Set target reduction goal	✓		
Compare against median of national sample of similar buildings (some space types)	✓		
Compare against normalized national sample of similar buildings (ENERGY STAR Score, some space types; Multifamily 1-100 Water Score)	✓	✓	
Compare building/s over time to goals and identify potential problems by looking at monthly trends	✓	✓	✓
Compare buildings in your portfolio to each other	✓	✓	✓
Apply for recognition (eligible space types)	✓		


SEPA 4

- So, what do we mean by “benchmarking”? Benchmarking is the process of comparing use to gain valuable perspective about building performance; Portfolio Manager offers several ways to compare energy and water use and waste and materials amounts.
- For all three of these things a baseline can be established in Portfolio Manager. The baseline is the starting point, a 12 month period, against which to measure use.
- There are different ways to compare back to the baseline. First, for energy, you can establish a target reduction in Portfolio Manager to compare against a baseline that is the median energy use of a national sample of similar buildings. Second, you can establish a target reduction based on your desired ENERGY STAR Score which reflects your performance when compared to a normalized national sample of similar buildings. Or, third, you can set a target for energy use to be a desired percentage lower than the energy use for the baseline you established. In other words, you can compare a building/s performance—its energy, water and waste and materials use—over time to measure change and assess goals AND to identify problems by looking at monthly trends.
- Buildings can also be grouped in Portfolio Manager and compared to each other.
- And, certain property types, those eligible for the ENERGY STAR Score, can apply for special recognition if the Score is 75 or higher.
- Now there is a water score for multifamily building types as well.
























So, what is the ENERGY STAR Score? The Score is a percentile ranking of your building compared to similar buildings nationwide. The Score was developed more than 15 years ago now, to offer context for assessing the relative performance of a building compared to its peers and to provide one simple number understood by all stakeholders. On this scale, 50 represents median performance. A score of 62 means that the property performs better than 62% of its peers and a 75 means that the property performs better than 75% of similar buildings nationwide, and is the minimum score required to earn ENERGY STAR Certification.

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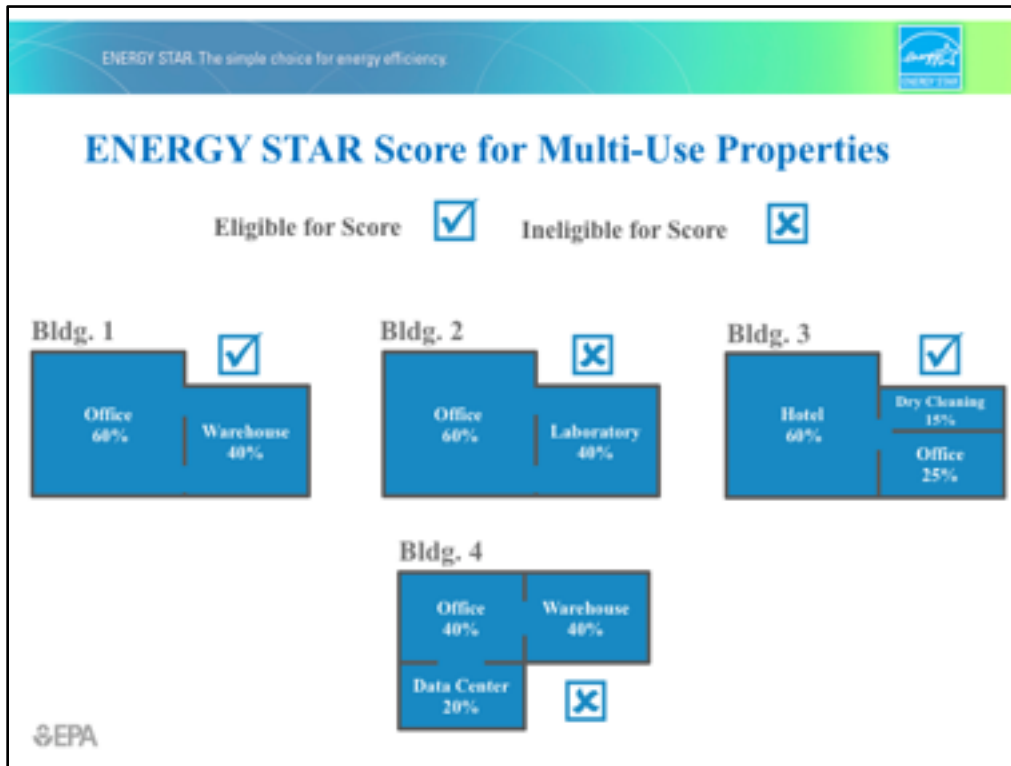


Property types with 1-100 ENERGY STAR scores

				
Bank Branch	Barracks*	Courthouses	Data Centers	Distribution Centers
				
Financial Offices	Hospitals	Hotels	K-12 Schools	Office Buildings
				
Medical Offices*	Multifamily Housing	Residence Hall/Dormitory*	Retail Stores	Senior Care Communities
				
Supermarkets	Warehouses	Wastewater Treatment Plants*	Wholesale club/ Supercenters	Worship Facilities

 *Not eligible for ENERGY STAR Certification

- These are the property types eligible for the ENERGY STAR Score. They are eligible for the score because there is a robust reference data set for these space types where EPA has found meaningful relationships between space types and how they use energy. So, when you enter a property in PM as one of these types, your actual data can be compared to the reference data set to generate the ENERGY STAR Score. If you don't see a particular space type on this list it means that an ENERGY STAR Score for that type is not available. Common examples include museums, libraries, police stations and convention centers. But keep in mind that while there is no Score for these property types, their performance overtime can still be tracked in Portfolio Manager using other metrics, like weather normalized energy use, for example.
- For properties noted with an asterisk (barracks, medical offices, residence halls, and wastewater treatment plants) there is an ENERGY STAR Score, but these properties are not eligible for certification at this time.
- For more information about eligibility:
<http://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager/understand-metrics/eligibility>



It is not uncommon for a property to have multiple property types within it. A multi-use property can receive the ENERGY STAR Score and receive certification, but these two conditions apply: 1) Seventy-five percent (75%) of the property's Gross Floor Area (GFA) must be comprised of property types that are eligible for an ENERGY STAR Score; and, 2) More than fifty percent (50%) of the GFA must be comprised of one eligible property type (excluding parking).

For example, Building 1 on the slide depicts a property that is 60% office and 40% warehouse. This space is eligible for a Score and certification because both property types are eligible for a Score, and because the office is more than 50% of the total GFA.

In Building 2, even though the office is more than 50% of the GFA, this building is ineligible for the Score because it doesn't meet the 75% minimum requirement. In other words, 40% of the space is comprised of lab, which is an ineligible property type.

Building 3 is eligible for a Score because it does meet the 75% minimum requirement—hotel and office are both eligible space types and combined make up 85% of the building GFA. This building is also eligible because the hotel is more than 50%.

Finally, Building 4 is not eligible for the Score, even though all three space types within it are eligible property types. This is because no one eligible property type is more than 50% of the total GFA.

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ENERGY STAR Portfolio Manager - Canada

- The tool has been adapted to include Canadian weather data, postal codes, both official languages, the metric system and other data specific to Canada.
- Property types Include:
 - Financial Office
 - K-12 School
 - Hospitals
 - Medical Office
 - Office
 - Residential Care Facility
 - Senior Care Community
 - Supermarket/Grocery Store
- Scores are based on a model developed by Natural Resources Canada using data from Canadian buildings.

 8

The Canadian property types on this slide can earn the ENERGY STAR Score now that tool has been adapted in partnership with Natural Resources Canada to include Canadian weather data, postal codes, both official languages, the metric system, and other Canadian data.

For more information about benchmarking Canadian properties, please see these FAQs:

[https://portfolio.manager.zendesk.com/hc/en-us/articles/211696987-Which-property-types-can-get-a-score-in-Canada-](https://portfolio.manager.zendesk.com/hc/en-us/articles/211696987-Which-property-types-can-get-a-score-in-Canada)

<https://portfolio.manager.zendesk.com/hc/en-us/articles/211027228-What-is-Canada-s-role-in-Portfolio-Manager->

<https://portfolio.manager.zendesk.com/hc/en-us/articles/215876957-Can-I-get-certification-for-my-Canadian-properties->

Please direct all questions about Canadian properties to Natural Resources Canada at:

Toll free: 1-877-360-5500

Ottawa local: 613-992-3245

Email: info.services@nrca-nrcan.gc.ca

Website: <http://www.nrcan.gc.ca/energy/efficiency/buildings/energy-benchmarking/13603>



To Get Started in Portfolio Manager you will need:

- 1 Property information:
 - Primary function
 - Name, address, postal code
 - Year built
 - Gross floor area
- 2 Property use details, e.g.:
 - Operating hours
 - No. of computers
 - No. of workers, etc.
- 3 At least 12 mos. of consumption data for resource/s you want to track:
 - Property-specific utility bills for all purchased and on-site generated energy and water
 - Quantity of waste and materials recycled, disposed, donated etc.

Use Portfolio Manager's **data collection wizard** to gather data upfront for your property type/s

<https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet>



- To create a record in Portfolio Manager, all you need are the items listed under number 1 on this slide: the property's primary function, name, address and postal code, the year built and the gross floor area. Enter those details and you have a record.
- If you are interested in generating the ENERGY STAR Score, you will also need property use details. The details are considered in Portfolio Manager to be the drivers of energy use in buildings. They will change according to the property type you are entering and Portfolio Manager will prompt you accordingly. The drivers of energy use in an office building will differ from those of a hotel, for example.
- Lastly, you will need consumption data for the resources you're interested in tracking. To generate metrics you will need at least 12 mos. of data because all metrics in Portfolio Manager are annualized. For energy and water this information typically comes from utility bills which you will need for all purchased and on site generated energy, and the same for water. And for waste, you will need the quantity of waste and materials recycled, disposed, donated, etc. The information may come from a measurement from your waste hauler, or from the size of the bin.
- The ENERGY STAR Program offers a very handy data collection wizard that creates a PDF or a Word document with all of the necessary inputs for the property type or types you wish to enter in Portfolio Manager. You can use the wizard, then collect the necessary data, so that you have everything you need when you sit down at your computer to create the Portfolio Manager record. The collection wizard helps reduce the amount of time you go back and forth to get the data you'll need.
- Find the data collection wizard here:
<https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet>



How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Generate reports to assess progress

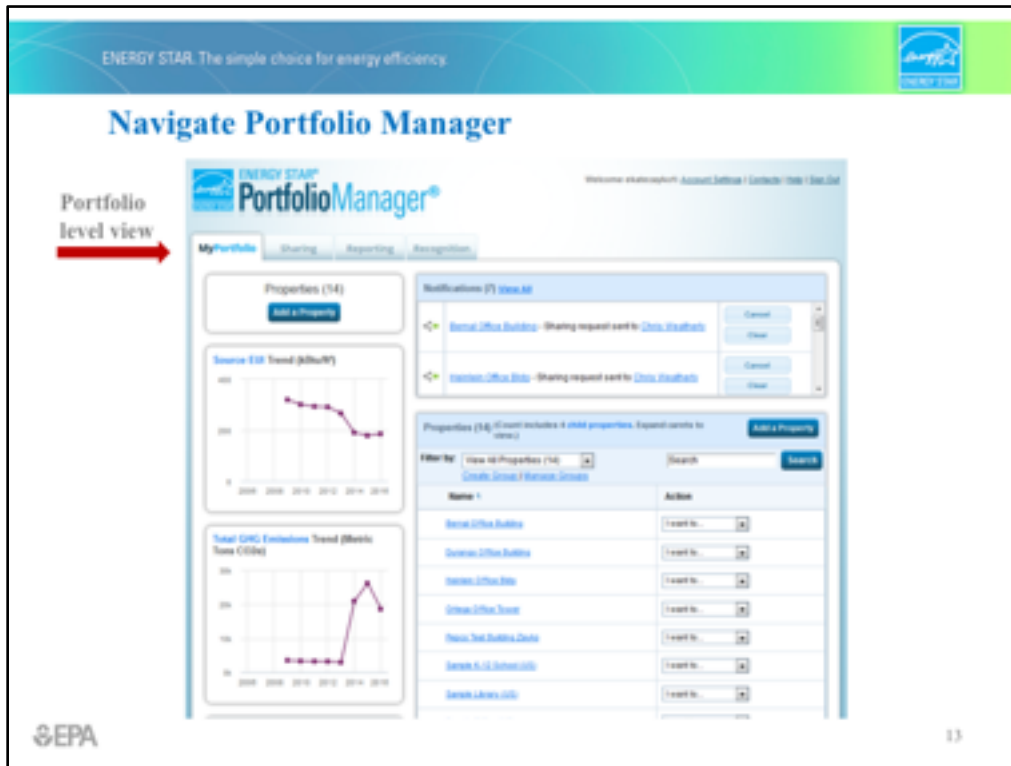
- With this background in mind, let's start with navigating Portfolio Manager.



- Portfolio Manager's navigation is very intuitive. It uses a tabbed structure that makes it easy to find your way around the tool. There are four tabs at the portfolio level and 7 tabs at the property level.



To create username and password and to login go to www.energystar.gov/portfoliomanager and follow the prompts on the screen – creating a new account is very simple.



- The point of this slide is to orient you to Portfolio Manager’s basic navigation.
- The portfolio-level tabs are listed across the top of the screen. We are looking at the MyPortfolio page here. You can also click on Sharing, Reporting, or Recognition from this page.
- The portfolio page automatically loads with your list of properties, two charts on the left hand side, and a list of notifications. These can be requests to connect with other users, notices that someone accepted a property that you shared, or others.
- The Help button in the top right corner will bring you to the Portfolio Manager help menu.

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Navigate Portfolio Manager

MyPortfolio | Sharing | Reporting | Recognition

Bernal Office Building
 110 Hibernia Lane, San Antonio, TX 78213 | [View](#)
 Portfolio Manager Property ID: 1004101
 Year Built: 1990
[Edit](#)

COMPLIANCE INFORMATION
 ENERGY STAR CERTIFICATION

ENERGY STAR Score (1-100)
Current Score: 89
Baseline Score: 43

Property level view →

Summary | Details | Energy | Water | Waste & Materials | Costs | Design

Notifications (1)
 Bernal Office Building - Sharing required user is Chris Scuderi
 Cancel | Clear

Property Profile (Changes coming Fall 2017)
 This section will be deleted in the Fall of 2017, except for the property photos which will remain.
[View information](#)
[Create Profile](#)

Source EUI Trend (kBtu/ft²)

Metric	Dec 2014 (Energy Benchmark)	Mar 2017 (Energy Current)	Change
ENERGY STAR score (1-100)	48	89	+183.4%
Source EUI (kBtu/ft ²)	328.0	108.7	-157.13.08.0%
Site EUI (kBtu/ft ²)	289.2	103.0	-173.36.08.0%
Energy Cost (\$)	4,099.00	\$0.000000	N/A
Total GHG Emissions (Metric Tons CO2e)	999.0	306.7	-291.36.08.0%
Water Use (All Water Sources) (gpd)	876.0	\$0.000000	N/A
Total Water Consumed and Discharged (gpd)	\$0.000000	\$0.000000	N/A

Check for Possible Data Errors
 Run a check for any 12-month time periods to see if there are any possible errors found with your data.
[Check for Possible Errors](#)

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14

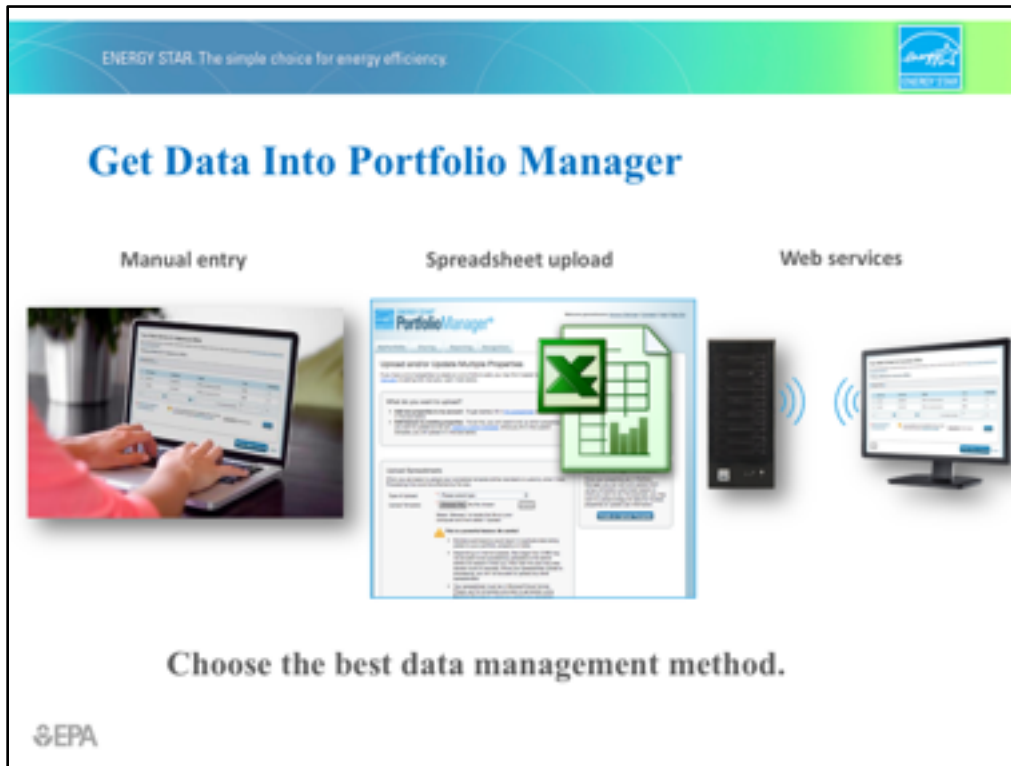
- After you click on a property name, you will see another set of property-level tabs. With these tabs, you can navigate between a summary of the property, property details, and meter data. You can also set and track progress against specific performance goals, and compare a building's current energy performance against its initial design.
- Clicking on the Portfolio Manager logo in the top left-hand corner will always take you back to the MyPortfolio page to see the list of all of your properties.



How To

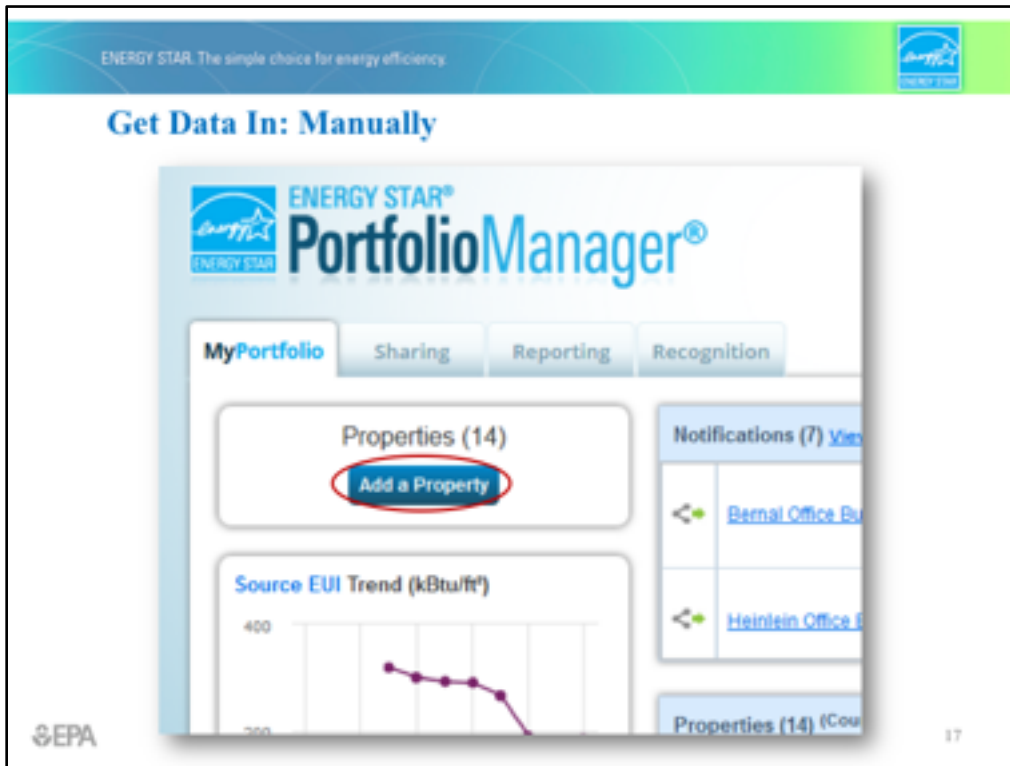
- Navigate Portfolio Manager
- **Add a property and enter its use details**
- Enter energy, water, and waste & materials data
- Generate reports to assess progress

- This completes our first objective, navigating portfolio manager. Now, we will discuss adding a property and entering details about it.

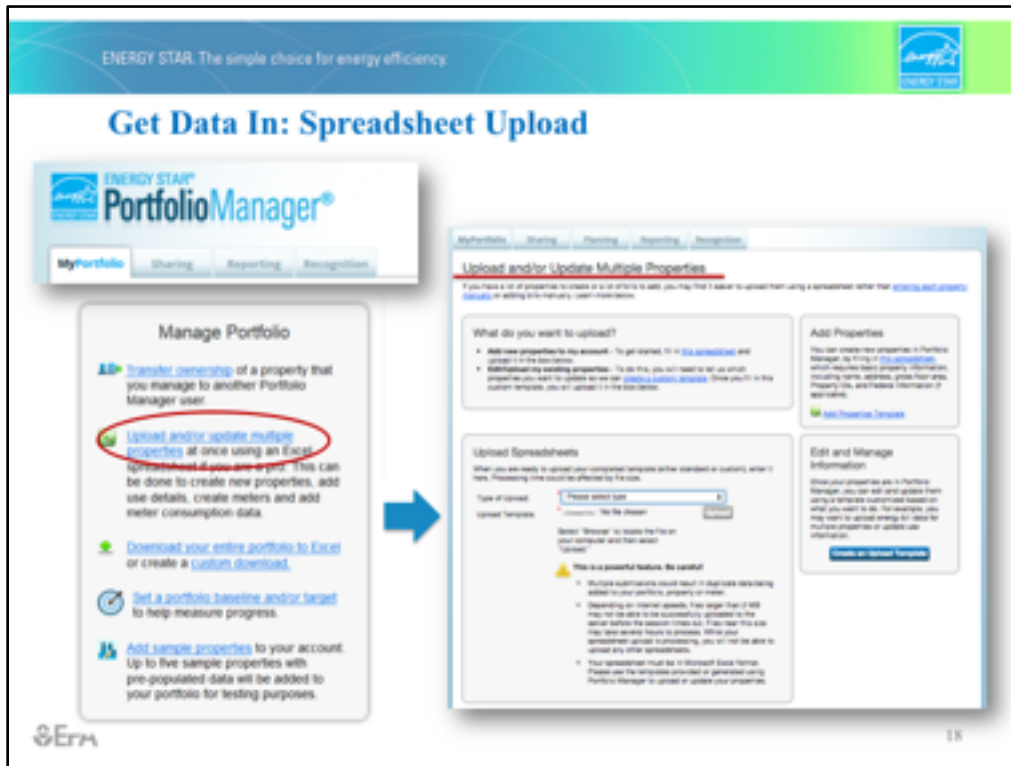


There are three ways to enter data for your property or portfolio:

1. The most basic approach is to enter data manually (create/update one property or meter at a time). This presentation walks through the steps of how to manually create a property record.
2. Another way is to upload data using spreadsheet templates to enter one building or multiple buildings, use details about the building or buildings, and meters and consumption data for meters.
3. The third way is to work with third-party providers that exchange data directly with Portfolio Manager via web services




- To add a building manually, select “Add a Property” from the top left corner of the MyPortfolio page. Entering data manually is easier than ever because multiple prompts and tips will guide you in entering your property’s information correctly.



- To use spreadsheet uploads, select “Upload and/or update multiple properties” from the Manage Portfolio menu on the bottom left of the MyPortfolio page. Then, from the page Upload and/or Update Multiple Properties, select the type of upload you would like to perform. Your options include adding properties, adding meters, adding meter consumption and updating property information. Portfolio Manager will generate a spreadsheet based on your selection. Fill out the spreadsheet and save it to your computer. Then, return to the Upload and/or Update Multiple Properties page and upload the spreadsheet. The data in your spreadsheet will be added to Portfolio Manager.
- **The spreadsheet upload feature is powerful, so be careful:**
 - Multiple uploads could result in duplicate data being added to your property.
 - Depending on internet speeds, files larger than 2 MG may not successfully upload to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
 - Your spreadsheet must be in Microsoft Excel format. Please use the templates in Portfolio Manager as they are, don’t edit the format of the spreadsheets.
- Portfolio Manager 301 demonstrates how to use spreadsheet uploads in more details, and for more information there is a very handy 5 minute instructional video here: at www.energystar.gov/buildings/training.

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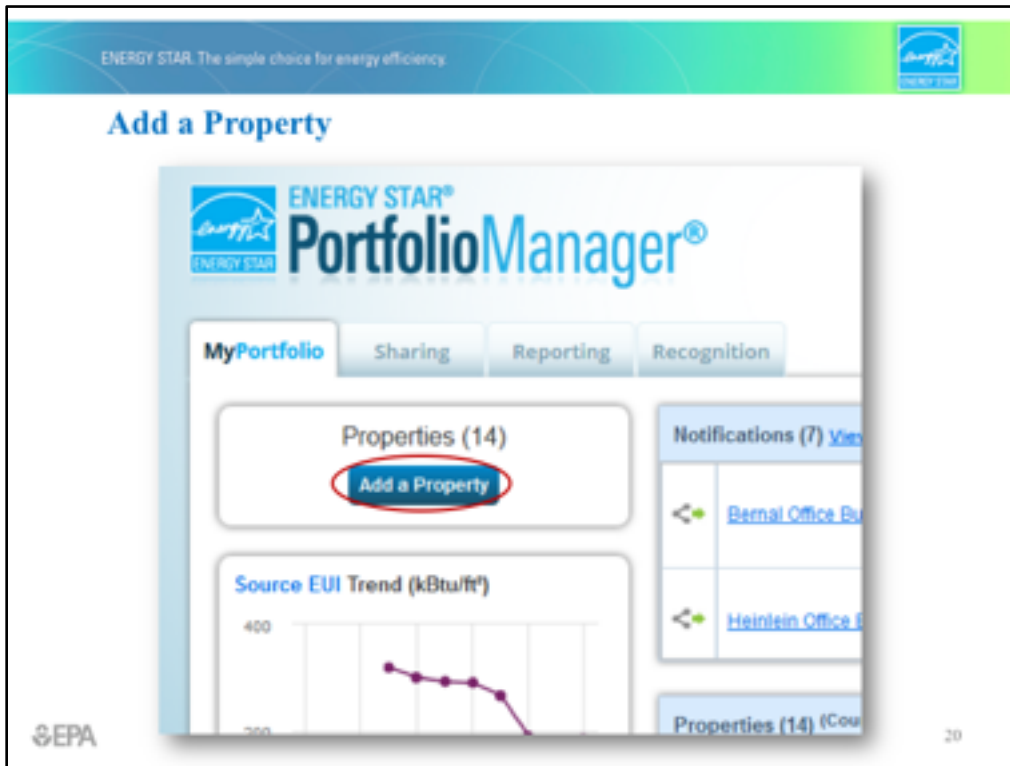


Get Data In: ENERGY STAR Web Services

- Enables energy service companies and utilities to exchange data with Portfolio Manager to:
 - Manage building and utility data for customers
 - Access the ENERGY STAR score and other performance metrics
- If you are using web services, you must “connect” and “share” your properties with your web service provider.

EPA 19

- The 3rd option for entering data is to utilize the services of ENERGY STAR partners that are set up to exchange data directly with Portfolio Manager via web services. This will be an energy service company or a utility. Web services provide the advantage of avoiding manual entry. The third party service provider or utility does that for you digitally.
- To utilize web services, it is necessary to connect and share with your provider. We discuss how to connect and share in Portfolio Manager 201 and there is very handy 5-minute video available on this topic here: at www.energystar.gov/buildings/training
- Your utility or third party provider will also have a set of instructions for enabling web services. Check with your provider for more details.
- Finally, there is a list of third party providers and utilities who can exchange data located towards the bottom of this page:
<https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager/enter-data-portfolio-manager>.



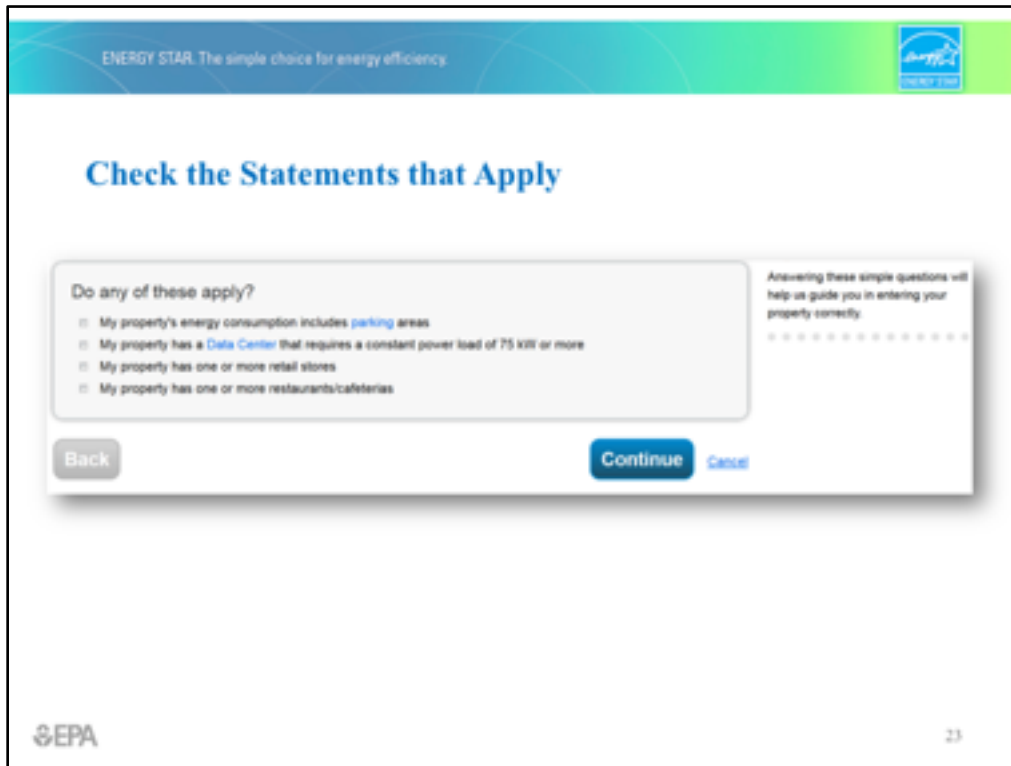
- Now, let's walk through the process of manually entering a building. To start, click the "Add Property" button in the top left-hand corner of the "My Portfolio" tab to access a wizard to "Set up a Property."



- This wizard is the first of many prompts that will help you correctly benchmark your property.
- From here, select the best property type. There are 85 options. Not all of these 85 types are eligible to earn the ENERGY STAR Score. However, as we noted earlier, benchmarking is valuable for all properties, so select the property type that best reflects your property. This will help you analyze the performance of the building and compare it to similar buildings in your portfolio.
- Next, designate the number of physical buildings located on your property, either none, one, or more than one. Choose “None” if you are benchmarking part of building (a space within a building) or “One” if you are benchmarking a single building and “More than one” if you are benchmarking a campus. In the case of the latter, make sure to review the Campus Guidance for tips on entering properties with multiple buildings. Also note that spaces within a building, say a single story for example, will generate an ENERGY STAR Score but are not eligible for ES Certification. The unit for ENERGY STAR Certification is individually metered single buildings, and in some cases campuses for the property types Hotel, Multifamily, Senior Care Center, Hospital or K-12 School.
- Finally, select the Construction Status of your property. Most properties will be “existing,” but properties could also be entered as “Design” for buildings that have not yet been constructed. Use the design option to evaluate the energy efficiency of the design project, to apply for Designed to Earn the ENERGY STAR Certification, and to compare designed energy use against actual use once the building is occupied and operational. “Test Property” is another option here, if your entering a fictitious property to test Portfolio Manager’s features. You can test a building in the design phase or as an existing building.
- Click “Get Started” to move to the next page.



- On the next page, enter general information, including property address, size, gross floor area and occupancy percentage.
- There are different ways of measuring gross floor area but in Portfolio Manager, it is the total property floor area, measured from the principal exterior surfaces of the building. Select the link next to Gross Floor Area on this page for more information.
- Irrigated area is not a required field. It is used in calculating the Water Score for Multifamily housing.
- Occupancy is the percentage of your property's Gross Floor Area (GFA) that is occupied and operational. For example, if you have a 10 story office building, that on average has 9 of its 10 floors fully leased and occupied, the occupancy would be 90%. If there are people working in all floors or areas of the building then it is 100% occupied. Also, there is only one occupancy rate for each property as a whole. The occupancy rate is not used in calculating the ENERGY STAR Score or other metrics, however, there are minimum occupancy requirements for ENERGY STAR Certification for certain property types. Offices, banks, courthouses, and financial centers need to be at least 50% occupied to apply for ES Certification. Hotels require 55% occupancy. Multifamily requires 75% occupancy.



- You will also be prompted to provide answers to a few additional questions that will help Portfolio Manager to guide you in entering your property correctly. The selection choices for “Do any of these apply?” varies depending on which primary function you choose.
- For all property types, there will be a question about parking. If your parking areas are separately metered from the building, you do not need to check this box. However, it is very common for parking areas and buildings to share a meter. If this is the case, check the box. On the next screen, Portfolio Manager will prompt you to enter more information about parking. Then, because the ES Score is an assessment of building performance not parking area performance, Portfolio Manager will estimate the amount of energy parking uses and subtract that out before calculating the building’s performance.
- Parking refers to buildings and lots used for parking vehicles. This includes open parking lots, partially enclosed parking structures, and completely enclosed (or underground) parking structures. Parking structures may be free standing or physically connected to the property.



- Next, you will be asked to provide more details for your primary property type. Each property type will have different use details. As you pass your mouse over each use detail, the definition will appear and the glossary will open if you click on the link.
- You may also want to edit the name of your property type to something more specific like Office Space 1, or Occupied Office Space.
- If you are in the middle of benchmarking and realize that you don't have certain pieces of information in front of you, you can always use Default/Temporary values. However, to ensure the accuracy of your metrics and if you're interested in applying for ES Certification, remember to update these default values with actual information once you have it.
- You can also use the drop down menu on this page to "Add another type of use" for multi-use properties where the additional use type isn't already included in Portfolio Manager's definition of your primary property type. A good rule of them is to enter as few property types as possible. There are 4 exceptions to this rule when you should create a separate Property Use:
 - If it is a [Property Use Type that can get an ENERGY STAR Score](#) (note: Retail can only get a score if it is greater than 5,000 square feet):
 - If it accounts for more than 25% of the property's GFA
 - If it is a vacant/unoccupied Office
 - If the Hours of Operation differ by more than 10 hours from the main Property Use
- Select "Add Property" when you are done entering use details.

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Property Summary Tab

MyPortfolio | Sharing | Reporting | Recognition

Supermarket A-1
 1214 Main Street, Arlington, VA 22201 | [Map](#)
 Portfolio Manager Property ID: 5999575
 Year Built: 1992
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/ft²) (No net meter)

Current EUI: **N/A**
 Baseline EUI: **N/A**

Summary | Details | Energy | Water | Waste & Materials | Goals | Design

Notifications (0)
 You have no new notifications.

Property Profile [Changes coming Fall 2017](#)
 This section will be deleted in the Fall of 2017, except for the property photos which will remain. [View Information](#)
[Create Profile](#)

Source EUI Trend (kBtu/ft²)

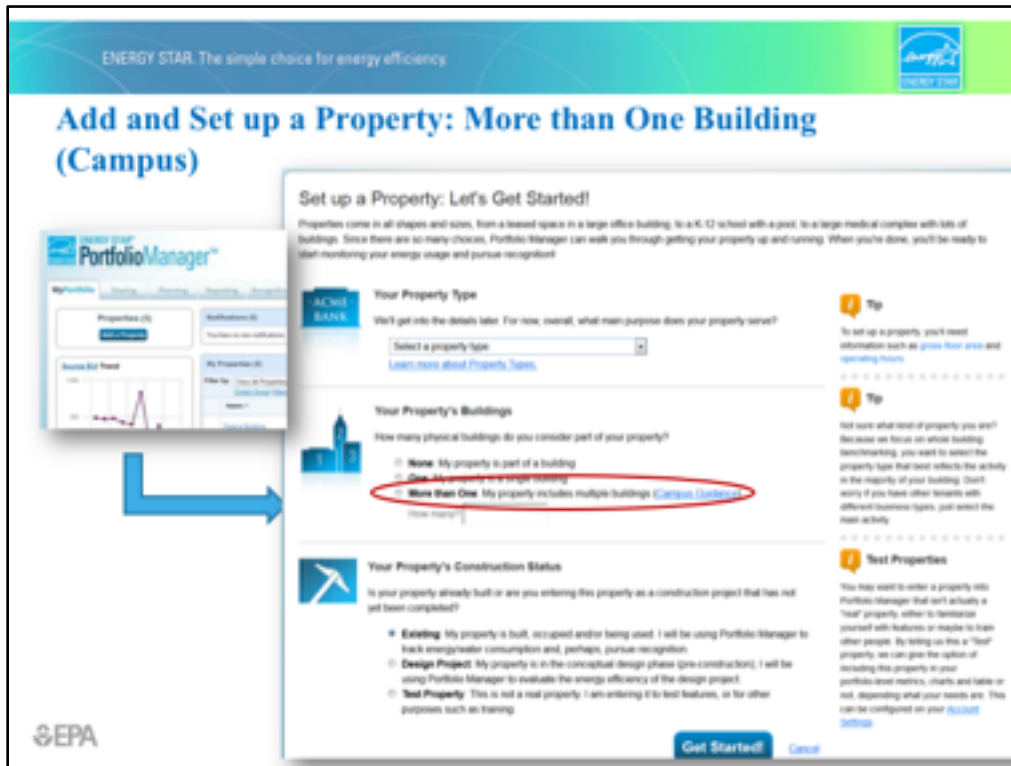
Metrics Summary

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions (Metric Tons CO2e)	Not Available	Not Available	N/A
Water Use (ft ³ /Water Sources (gpd))	Not Available	Not Available	N/A
Total Waste (Disposed and Recycled) (tons)	Not Available	Not Available	N/A

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25

- Now the property is created! This is the property Summary tab. From here you can view the property's details, enter data for energy, water and waste, and set goals.
- Notice that there are no summary metrics displayed in the box in the top right. This is because there's no meter and consumption data entered for the property. So, next, we will cover how to set up meters.



- Before moving on, here is some additional information about campuses. Campuses are entered as a single “parent” property with multiple “child” buildings. This allows you to report on metrics at the campus level, while still being able to track performance of the individual buildings that make up this campus (assuming that you have the necessary building-level energy, water, and waste & materials data). For properties with multiple buildings, only Hotel, Hospital, K-12 School, Multifamily, and Senior Care Communities are eligible to receive a 1-100 ENERGY STAR score at the campus level.
- For more information about how to benchmark a campus, visit <http://www.energystar.gov/buildings/tools-and-resources/how-benchmark-campus>

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Campus Configurations

MyPortfolio | Sharing | Reporting | Recognition

Campus
 6780 Main Street, Arlington, VA 22201 | [View](#)
 Portfolio Manager Property ID: 5829582
 Year Built: 1995
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/sqft)
 Current EUI: **N/A**
 Baseline EUI: **N/A**

Summary | Details | Energy | Water | Waste & Materials | Goals | Design

Notifications (0)
 You have no new notifications.

Metrics Summary
 Not Available (Energy) | Not Available (Energy)

More About Individual Buildings
 This property is a multi-building property. But you haven't added any individual buildings. This is optional. You don't have to add individual buildings unless you would like to track performance separately. This will only be possible if you have your buildings metered individually. Also keep in mind that if you enter individual buildings, you will still need to keep use and meter information about the property as a whole up to date in order to receive accurate metrics about your property (and, in some cases, to apply for the ENERGY STAR). [Learn more about tracking multi-building properties.](#)

Property Profile
 This section will be used for the property photos and information.
[+ Create Profile](#)

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27

- Once you define the campus as the main property there's flexibility in how you benchmark it. You can either benchmark the campus in aggregate, benchmark individually-metered buildings on the campus, or both.
- If you enter individual buildings, you will need to keep use and meter information up to date at both the building and campus level.



How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Generate reports to assess progress

- This completes our second objective, adding a property and details. Next, we will learn about entering energy, water, and waste & materials data.

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Meters Tabs

MyPortfolio | Sharing | Reporting | Recognition

Supermarket A-1
 1214 Main Street, Arlington, VA 22201 | [Map](#)
 Portfolio Manager Property ID: 8898375
 Year Built: 1982

Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/ft²)
 Current EUI: N/A
 Baseline EUI: N/A

Summary | Details | **Energy** | Water | Waste & Materials | Goals | Design

Notifications (2)
 You have no new notifications.

Property Profile (Changes coming Fall 2017)
 This section will be deleted in the Fall of 2017, except for the property photos which will remain. [More](#)
[S&P/Global](#)
[Create Profile](#)

Source EUI Trend (kBtu/ft²)

Metric	Net Available (Energy Baseline)	Net Available (Energy Current)	Change
ENERGY STAR score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions (Metric Tons CO2e)	Not Available	Not Available	N/A
Water Use (All Water Sources) (gallons)	Not Available	Not Available	N/A
Total Waste Disposed and Diverted (tons)	Not Available	Not Available	N/A

Check for Possible Data Errors

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29

- In the property record, there are property-level tabs for energy, water and waste & materials. For each resource you would like to benchmark you will use the tabs to set up meters and enter utility data to receive related performance metrics for your property.
- Next, we'll give an overview of each meter. Then we'll walk through the entire process of setting up a meter using the energy meter as an example.



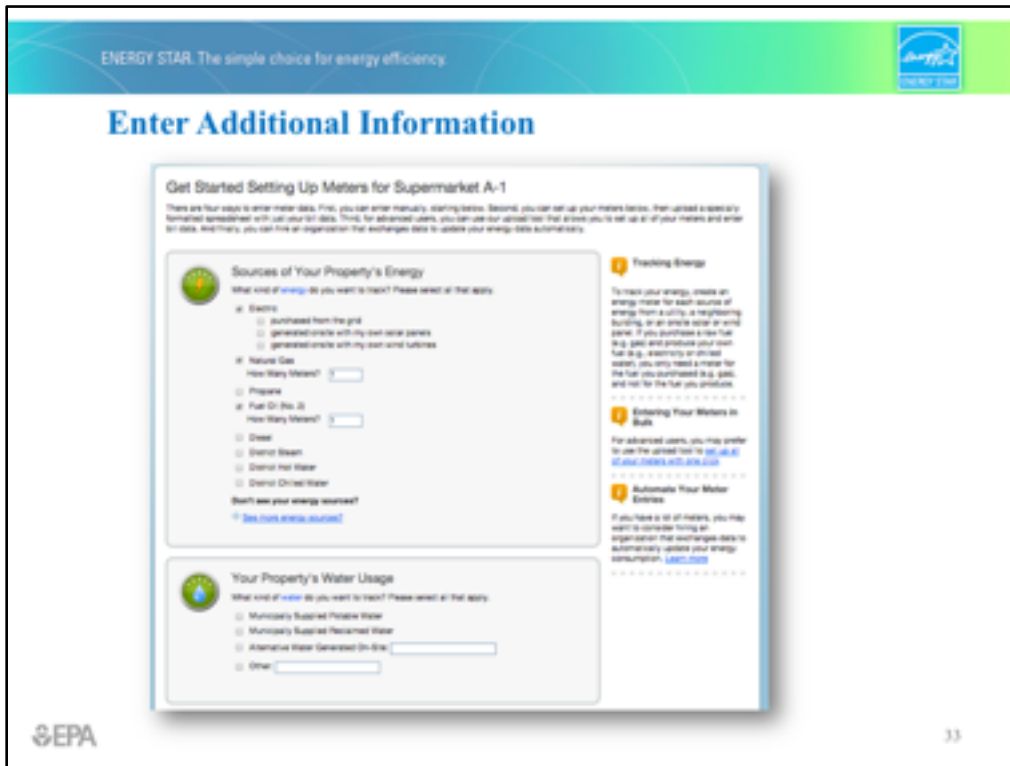
- Use the Water tab to enter water meters and water consumption.
- To get started, click ‘Add a Meter’ and follow the prompts offered by the handy wizard to enter water meters and then consumption data.
- Portfolio Manager tracks water meters based on the water source. There are four types: Municipally Supplied Potable or Reclaimed Water, Well Water and Other water (e.g., condensate or rainfall collection). The metrics for each of these water sources are tracked as Indoor, Outdoor or Mixed.
- Once water meters and consumption data are entered, the water metric display on the left will display water use intensity representing all sources of water entered. For multifamily properties it will display the Water Score for Multifamily if irrigated area has also been entered.



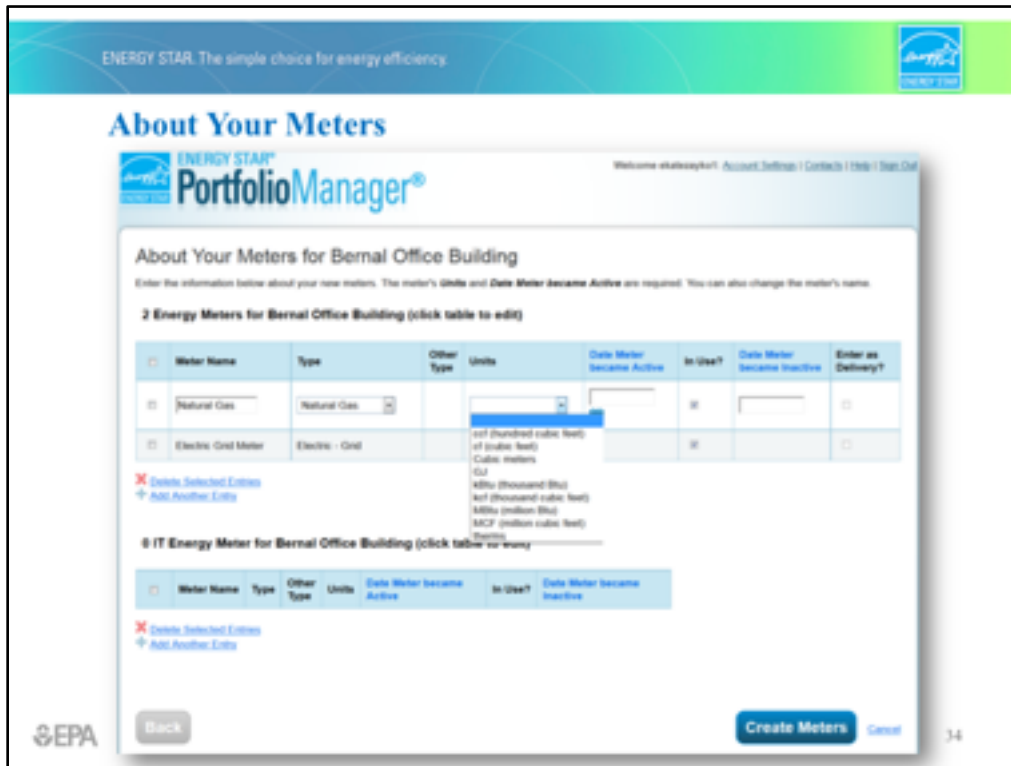
- Use the Waste and Materials tab to create meters and enter waste and materials, for example, trash, recyclables, composting, and 29 others like building materials and electronics.
- To get started, click ‘Add a Meter’ and follow the prompts offered by the handy wizard to enter waste and materials.
- You will be prompted to select what type of waste or material you would like to track, and then whether it is recycled, composted, donated/reused or disposed, and how often it is collected. Finally you are prompted to provide the weight and volume of what is collected, or Portfolio Manager provides an estimate based on the container size.
- You can further categorize your disposed waste by its destination, whether it ends up in a landfill, gets incinerated, or is converted to energy.
- You can also track waste or material according to whether it is picked up on a regular basis (like trash or recycling), or if the pick up is “intermittent” or one-time only like a donation of old office furniture.
- Next, let’s walk through the entire process of setting up a meter using the energy meter as an example.



- Use the Energy tab to create meters and enter energy consumption.
- To get started, click ‘Add a Meter’ and follow the prompts offered by the handy wizard to enter energy meters and then consumption data.



- On the “Getting Started Setting Up Meters” page, you will be prompted to identify all sources of energy consumed at the property, as well as the number of meters for each fuel source. Make sure to include every fuel consumed.
- For electricity, you will be asked to indicate whether the energy was purchased from the grid, or generated onsite via solar or wind power.



- On the “About Your Meters” page, click anywhere in the table to add data about your meters
- To enter units, select the accurate unit from the drop down menu.
- The “Date Meter Became Active” can be the date the building was built--typically, your meter becomes active when construction is complete and the building starts operating—or it can be the first day of the first bill for the first 12 mos. period you wish to benchmark.
- You only need to enter a date the meter became inactive if you want to note that a meter has been decommissioned.
- If your fuel is delivered in bulk (like fuel oil or propane) then check “Enter as Delivery.”
- You can also add an additional meter from this page, if on the previous page you forgot one.
- Once you have defined the general characteristics of each meter, select “Create Meters” to begin entering your bills.

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Expand meter by clicking arrow

ENERGY STAR Portfolio Manager®

Your meters have been created. If you have your energy consumption information for these meters, you can enter it below. Or you can [get your data](#).

[METERS USE THESE](#) and enter your energy data now.

Your Meter Entries for Supermarket A-1

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

Energy Meter(s) for Supermarket A-1

- ▶ Natural Gas [Edit](#)
- ▶ Fuel Oil (No. 2) [Edit](#)
- ▶ Electric Grid Meter [Edit](#)

[Back](#) [Continue](#) [Cancel](#)

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EPA 35

- On the next page, you will see the meters you have established. To expand each meter record, click the arrow to the left of the meter you would like to edit.
- All meters will be presented on the same page. This allows you to add data to multiple meters at the same time (no need to click through multiple meter entry pages).

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Add Meter Entries and Fill in Data

How To Guide: Electric Demand Tracking
https://www.energystar.gov/buildings/tools-and-resources/how_track_electric_demand_portfolio_manager

Add another entry

Start Date	End Date	Usage (kWh (thousand Watt-hours))	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Upload data in bulk for this meter:

You can copy/paste into the table above, [download a CSV file](#), or upload an Excel spreadsheet using our simple [spreadsheet uploader](#).

Choose File No file chosen

Save Bills Cancel

Use a spreadsheet to upload or copy and paste

SEPA 36

- Next, enter consumption data for each meter by selecting “Add Another Entry” to enter the start and end date, usage, and cost. As with the prior page, you can click anywhere in the table to edit the corresponding data field. When you enter a start date, Portfolio Manager auto-populates the end date. Portfolio Manager will also auto-populate the next start date when you select “Add Another Entry” again.
- **A quick note that PM now tracks demand and includes these three metrics in custom reports: Annual Maximum Demand (kW), Annual Maximum Demand (MM/YYYY), and Annual Maximum Demand (Meter Name (Meter ID)).** We have a How to Guide on this topic: https://www.energystar.gov/buildings/tools-and-resources/how_track_electric_demand_portfolio_manager.
- “Usage” is required. Cost is not required. However it is a best practice to enter cost to have access to handy metrics like energy cost per sq. foot, for example. Use “Estimation” whenever you make an estimation when the value you are entering comes directly from your utility bill, you do not need to check estimated, even though some utility bills are marked this way when they contain small estimates based on how the utility read your meter.
- To generate accurate metrics, enter at least 12 consecutive months of data for all fuels consumed in the building. For the most accurate metrics, enter the start and end dates on your utility bill. If the start and end dates fall in the middle of the month, you will need to enter 13 billing periods in order to get a complete 12 calendar months of data. For more information about acceptable meter entry time frames, see this FAQ: <https://portfoliomanager.zendesk.com/hc/en-us/articles/211027768-Can-I-enter-energy-bills-that-are-not-monthly-Can-I-enter-one-energy-bill-for-the-entire-year>
- You can also enter purchased solar and wind power by checking the “Green Power” box, which will then prompt additional questions about where the energy was purchased and what type of green power it is. Tracking green power purchases will affect the greenhouse gas emissions metrics for your property. More information about entering both purchased and onsite generated green power is available here: <http://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-technical-reference-green-power>.
- Another option is to use a spreadsheet to upload consumption data, which is available on this page. It’s a simple spreadsheet; there are only 5 columns. Once you have filled in the necessary data, you can upload the spreadsheet back into Portfolio Manager via this page, OR even easier, Cut and Paste into the first box.
- Make sure to select “Continue” after you populate the page.



- The next step is to select meters to include in metrics. This page is important for Portfolio Manager to understand which meters should be applied to the total property energy consumption, and therefore should be used for calculations. Indicate that the meters do account for total energy consumption or that they do not account for total energy consumption.
- A note about campuses: If you are setting up a multi-building campus, and want to roll up any building-level meters to the larger property, this is where you will do it. In the campus scenario, be aware that you need to define the meters at the building level first, before you can associate them to the property level. To avoid double counting any energy, do not add sub-meters to property totals if the energy consumption they are tracking is also captured by the main meter.
- When you are done, click “Apply Selections.”

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Energy Meters Tab: Meters Added and Displayed

MyPortfolio | Sharing | Reporting | Recognition

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

Supermarket A-1
 1214 Main Street, Arlington, VA 22201 | [Map](#)
 Portfolio Manager Property ID: 8038175
 Year Built: 1992
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/sq ft)

Current EUI: [N/A](#)
 Baseline EUI: [N/A](#)

Notification

Add or update bills

Summary | Details | **Energy** | Water | Waste & Materials | Goals | Design

Meter Summary
 3 Energy Meters Total
 2 - Used to Compute Metrics
[Add A Meter](#)
 Current Billing Date: Not Available
[Enter Your Bills](#)

Meters - Used to Compute Metrics (3)
[Change Meter Selection](#)
[View All Meters](#)

Name	Meter ID	Energy Type	Most Recent Bill Date	In Use? (Positive Date)
Electric Grid Meter	30621300	Electric - Grid		Yes
Fuel Oil (No. 2)	30621302	Fuel Oil (No. 2)		Yes
Natural Gas	30621301	Natural Gas		Yes

Download Annual Totals by Meter

SEPA

38

- Now, your meters are set up and you will see a note of congratulations back on the Energy tab.
- Here you can review a summary of and access the energy meters that are set up for the building.
- If you want to add your latest bills or update past entries, select “Enter Your Bills” or select the relevant meter.

View Meter Data and Manage Bills for Your Property

Monthly Entries

Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Updated
<input type="checkbox"/>	12/1/2013	1/1/2014	532,173	38,912.96	<input type="checkbox"/>	<input type="checkbox"/>	1,280.48	13,304.33	6/1/2017 Sample Data_Demand
<input type="checkbox"/>	1/1/2014	2/1/2014	518,833	38,912.49	<input type="checkbox"/>	<input type="checkbox"/>	1,261.26	12,870.63	6/1/2017 Sample Data_Demand
<input type="checkbox"/>	2/1/2014	3/1/2014	516,486	38,737.16	<input type="checkbox"/>	<input type="checkbox"/>	1,255.37	12,812.39	6/1/2017 Sample Data_Demand
<input type="checkbox"/>	3/1/2014	4/1/2014	538,123	37,559.25	<input type="checkbox"/>	<input type="checkbox"/>	1,218.58	12,503.06	6/1/2017 Sample Data_Demand
<input type="checkbox"/>	4/1/2014	5/1/2014	518,871	38,932.86	<input type="checkbox"/>	<input type="checkbox"/>	1,261.39	12,874.29	6/1/2017 Sample Data_Demand
<input type="checkbox"/>	5/1/2014	6/1/2014	511,207	38,340.56	<input type="checkbox"/>	<input type="checkbox"/>	1,242.52	12,782.19	6/1/2017 Sample Data_Demand

- After selecting “Enter Your Bills” or clicking on the relevant meter you can add billing periods or make any necessary edits.



How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Analyze progress using performance documents, charts and graphs and reports

- That completes our third objective, entering energy, water, and waste & materials data. Now, we will discuss how to generate performance documents, charts and graphs and reports to analyze performance.

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Reporting Tab

MyPortfolio | Sharing | **Reporting** | Recognition

Charts & Graphs

Choose from pre-set chart & graph options

Weather Normalized Source EUI
How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

Download performance documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Process & Goals Report
- ENERGY STAR Score Card

Templates & Reports (14)

Create and generate templates & reports

Name	Status	Action
Data Request(Data Request 1 Request from Owner Grid)	Response/Preview Generated 5/13/2017 1:02 PM	Download
Data Request(Data Request 1 Request from Owner Grid)	Response/Preview Generated 5/13/2017 12:58 PM	Download
Weather Normalized Data?	No Report Generated	Download
Weather Normalized Data	No Report Generated	Download
Weather Normalized Data?	No Report Generated	Download
Water Performance	No Report Generated	Download

SEPA

41

- Benchmarking can only drive action if you can clearly access and interpret the data you have entered into Portfolio Manager. The features on the Reporting tab will help you do this. From this tab you can download Performance Documents, generate charts and graphs and create pre-loaded and custom reports to export useful energy, water and waste and materials metrics to analyze building performance across a variety of measures.
- Today we'll provide an overview of these items and we discuss them in more details during Portfolio Manager 301.



- Performance Documents reflect details and performance about individual properties you have entered. There are five Performance Documents to choose from:
 - Statement of Energy Performance
 - Statement of Energy Design Intent
 - Data Verification Checklist
 - Progress and Goals Report
 - ENERGY STAR Scorecard
- Click on the one you'd like to generate and follow the additional prompts to select which property to include in the report which downloads in .PDF format.
- To save the Performance Document save the .PDF on your computer. Generated Performance Documents are not saved in Portfolio Manager.

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Charts & Graphs

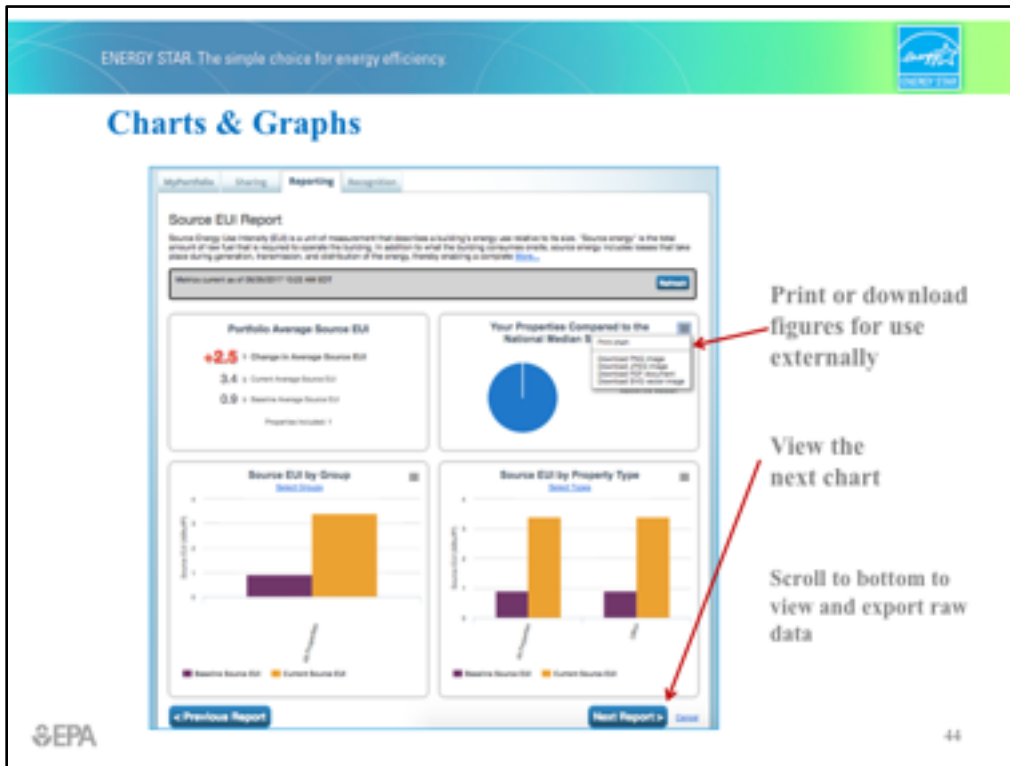
- Source EUI
- Site EUI
- ENERGY STAR score
- Weather normalized source EUI
- Weather normalized site EUI
- Total GHG emissions intensity
- Energy cost intensity
- Indoor water intensity
- Indoor water cost intensity

Scroll through to see available Charts & Graphs.

SEPA

43

- The charts & graphs feature is a pre-defined collection of metrics for at-a-glance results for your entire portfolio. Generate these charts by selecting the name of the chart or its icon. There are nine to choose from:
 - **Source EUI** - Based on the total amount of raw fuel required to operate my properties, how much energy are my properties consuming relative to their sizes?
 - **Site EUI** - Based on the energy consumption measured by my meters, how much energy are my properties consuming relative to their sizes?
 - **ENERGY STAR Score** - What are the average ENERGY STAR scores of my properties?
 - **Weather normalized source EUI** – source energy use intensity adjusted for weather
 - **Weather normalized site EUI** – site energy use intensity adjusted for weather
 - **Total GHG emissions intensity** – emissions intensity based on fuel mix
 - **Energy cost intensity** – cost per square foot based on user-entered cost data
 - **Indoor water intensity** – water consumption per square foot
 - **Indoor water cost intensity** – cost per square foot based on user-entered cost data



- Here's an example of the "Source EUI" report. It includes portfolio averages, comparison to the national median, and energy use intensity by group and property type.
- You can select a specific group and specific property types to view.
- Each chart and graph in the reports can be printed or exported in a variety of formats (PDF, JPEG, PNG, SVG) for easy integration into external reports and presentations.
- At the bottom of this page, you can also view and export the raw data used to create each chart/graph.



Towards the bottom of the Reporting tab, you will see a set of nine standard reports (listed on next slide).

- These reports contain key metrics and information that you can use to easily assess your portfolio's performance and progress across a variety of parameters.
- To generate any of these reports, go to the "Action" drop-down menu and select "I want to... Generate New Report." You will be asked to select the timeframe for this report, as well as the properties to include.
- Once you generate the report, you will be able to view it from the "Action" drop-down menu. You can also download the report in Excel and XML formats, update the report to include additional properties and/or new timeframes, and generate a new report.
- In the third training, Portfolio Manager 301, we will discuss how to use the custom reporting feature to further tailor the specific reports that you can generate for your properties.

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Standard Reports

- Performance Highlights
- Energy Performance
- Emissions Performance
- Water Performance
- Fuel Performance
- Waste Performance
- ENERGY STAR Certification Status
- Partner of the Year Report
- Sustainable Buildings Checklist Report

 EPA 46

- Here is a list of the 9 standard reports that are pre-loaded with popular combinations of metrics.
- EPA has also developed a PDF document that summarizes each of these reports, as well as the list of metrics delivered for each report, available here:
<https://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-standard-reports>



Recap

We learned how to:

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Analyze progress using performance documents, charts and graphs and reports

- In conclusion, these are the topics we discussed today.
- We hope that you will attend the follow-on training session, “Portfolio Manager 201.” In that session, you will take a deeper dive into more advanced Portfolio Manager functionalities such as:
 - editing existing property data
 - correcting and updating historical information
 - using the Data Quality Checker
 - sharing property data



Extra Help

- Visit www.energystar.gov/buildingshelp
 - Extensive list of FAQs
 - Online form to submit technical questions or comments
- Additional Portfolio Manager training resources available at:
www.energystar.gov/buildings/training
 - Step-by-step documents (PDF)
 - Access to recorded trainings and short videos
 - Information on upcoming trainings
- Register for regular webinars at: <http://esbuildings.webex.com>
- Portfolio Manager Technical Reference Series:
http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_model_tech_desc

- Please be aware of these additional resources, which will help you as you get started in Portfolio Manager.



Thank you for attending!

Questions?

If you have any questions on Portfolio Manager or the ENERGY STAR program, contact us at:

www.energystar.gov/BuildingsHelp

Portfolio Manager[®] 201



ENERGY STAR[®]
PortfolioManager[®]

- Hello to everyone and welcome to today's ENERGY STAR webinar, "Portfolio Manager 201," which will provide a closer look at some of the more advanced features of the tool. Thank you for joining us.



Learning Objectives

In this session, you will learn about EPA's ENERGY STAR Portfolio Manager tool and how to:

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

- Today we'll dive a little deeper and look at how to maintain accurate data in Portfolio Manager. These are today's learning objectives.



Portfolio Manager 101

If you're brand new to using Portfolio Manager, these resources are a good place to start:

- Portfolio Manager 101 webinar
- Portfolio Manager Quick Start Guide

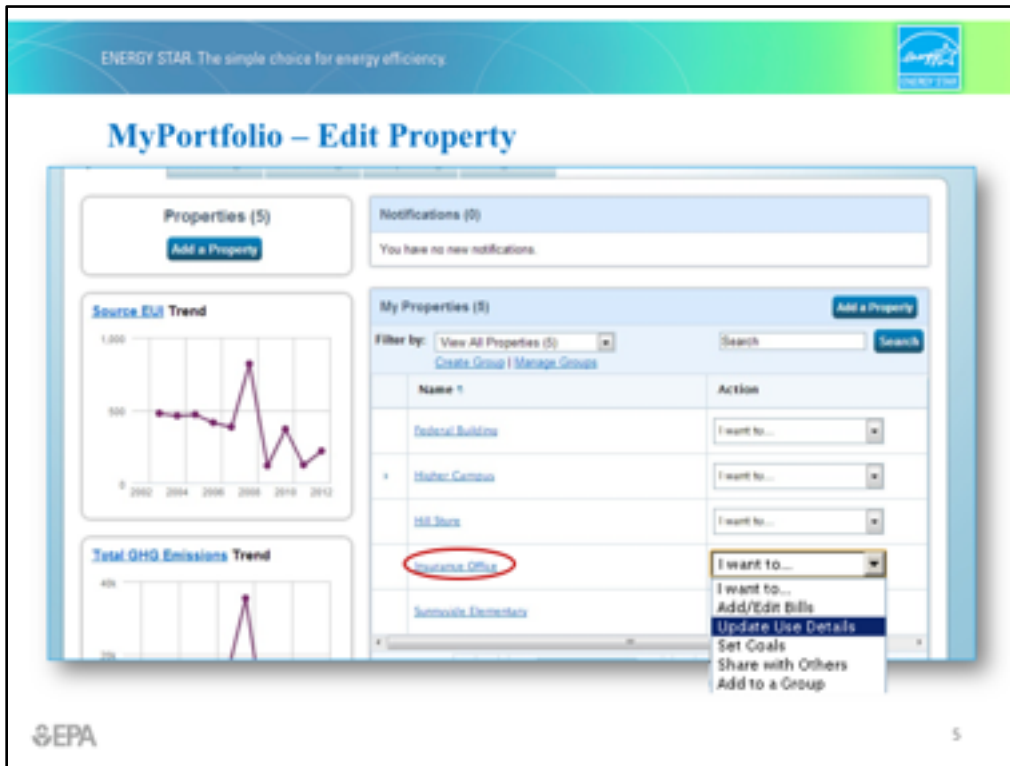
- We'll jump right into these learning objectives, assuming that you're already familiar with the initial step of creating records in Portfolio Manager.
- If not, please take a look at PM 101 to learn how to enter a property.
- Another great resource is the PM Quick Start Guide. It's a 3-page pdf that walks through the steps of entering a building for the first time. It's available at:
<https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager/get-started-benchmarking>



How To

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

- Let's start with editing property data.



- Now that you have your building set up and you've entered the essential information in the tool, you should ensure that the property is set up in a way that best reflects how it actually functions. If necessary, you can correct or update your property's information.
- From the MyPortfolio page, you can click on the name of the building that you would like to edit, and then navigate to the Details tab. Or you can select "Update Use Details" from the drop-down list next to the building's name.



- From the “Details” page, you will be able to:
 - Edit basic property information
 - Edit Property IDs
 - Designate a Service and Product Provider (SPP)
 - Edit Property Use Details (number of hours/workers)
 - Add an additional Property Use (if necessary)
- To edit basic property information, select “Edit”



- From here, you will be able to edit the property's address, though the country cannot be changed (for more info see: <https://portfoliomanager.zendesk.com/hc/en-us/articles/211029098-Can-I-change-my-property-s-country-location->)
- Then, you will be able to edit additional property information.

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Edit Property – Property Use Detail

Property Details

What is the primary function of your property?

Property Type – EPC Calculated: Office
Portfolio Manager estimated your property to be this type based on the uses you have entered. If this type doesn't best describe your property, click [edit](#).

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

- None: My property is part of a building.
- One: My property is a single building.
- More than One: My property includes multiple buildings. [Learn More](#)

How many?

Construction Status:

- Drafting
- Design
- Not

Not Built?

Gross Floor Area:

Gross Floor Area (GFA) is the total property floor area, measured from the outside surface of the exterior walls of the building. See [this link](#) for more information.

Reported Area:

Occupancy: %

Property Type Classification

The "Property Type – EPC Calculated" was determined by how you entered the Property Use for this and all the property. The Property Type you entered may not match the EPC Calculated one, and that's ok. It doesn't mean you may be having your property differently for analysis. If you have a company that is EPC affiliated, you may consider to be used, but Portfolio Manager will report your office. If you are concerned about the EPC Calculated Property Type, you may want to make adjustments to the [Property Use](#) you entered or select a new Property Type.

Additional Information

Is this property data maintained by a Service and Product Provider? No Yes

Is this a Federal Property (owned by any country)? No Yes

[Update Property](#) [Cancel](#)

- Under “Property Use Detail,” you can edit all of the basic information that you initially entered for your building, including:
 - Primary function
 - Whether the property is part of a larger building, is a single building, or includes multiple buildings
 - Change the total Gross Floor Area for the property
 - Change the reported occupancy
 - Identify whether the property’s data is maintained by a service and product provider (if it is, you will be prompted to indicate the SPP, who must be in your contacts list. This is important, as it allows SPPs that are ENERGY STAR partners to get credit for assisting with the benchmarking of a building).
 - Indicate whether or not the building is a Federal property
- If you make any changes on this page, click **Update Property** at the bottom



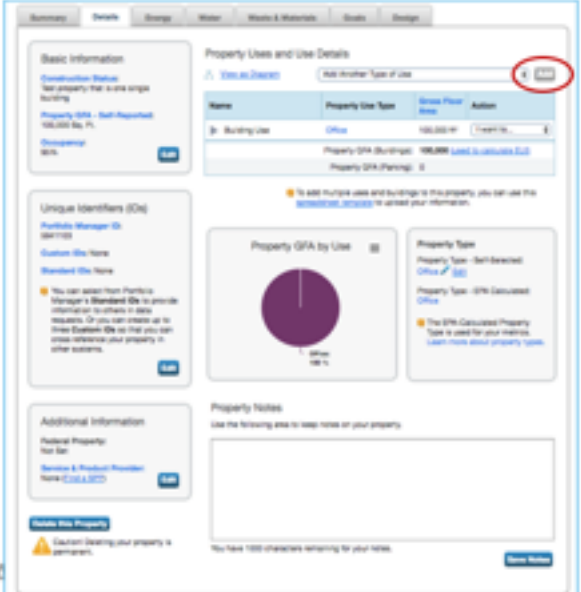
Tip: Defining Property Use Types

- Designate your property's "Primary Function"
 - Pick the property type that you most closely identify with
 - More than 80 property types to choose
- Add additional property uses only if:
 - It is a property use that can get an ENERGY STAR score
 - It accounts for more than 25% of the property's GFA
 - It is a vacant/unoccupied Office or Medical Office (at greater than 10% of the property's GFA)
 - The hours of operation differ by more than 10 hours from the main property use

- The Primary Function is the Property type with which the building most closely identifies. You can change it at any time. If you have a property that is half hotel, half office, which do you think of it as? Refer to the glossary for Property Use definitions if you are unsure what category your building falls under. Typically, a building's primary function will be represented by a majority of the building's square footage.
- And, depending on the property type you selected when setting up the building, and how you responded to specific prompts, the tool may have already guided you in setting up additional property-specific use types, such as parking, data centers, and/or swimming pools.
- You may wonder if it is necessary to add additional Property Uses to your building. For example, if you have an Office with ground floor retail, do you add the retail as a separate Property Use? The short answer is probably not. In general, the goal is to add as few Property Uses as possible. But there are 4 exceptions to this rule listed here. You would not break out a ground floor retail shop unless it met one of the exceptions.
- Another example are the supporting spaces in office buildings such as conference rooms, common areas, and mechanical rooms. The definition for the property type "office" in Portfolio Manager's glossary says to include these spaces within the gross floor area for office, therefore they do not need to be added as additional property types.

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Example: Adding a Separate Use Type for Vacant Space



Scenario

Office Building with Gross Floor Area = 100,000 sq. ft.

At time of property set-up, 10,000 sq. ft. are vacant.

Click "Add" to add another use type ("Office") to account for vacant space.

- Let's use the example of vacant space to demonstrate how to add an additional property use type. If you have an office or medical building where vacancy fluctuates over time, it is necessary to break out the vacant space as a separate property use, in order to get an accurate ENERGY STAR Score.
- In this example, there is currently 10,000 sq ft of vacant space that recently came open. We're going to add this vacant space as if it existed when we first started tracking the building.
- To add a new vacant space go the Property Use drop down menu on the Details tab, choose the Property Use that best matches the vacant space (typically, this would be the same as the primary building function), and then click "Add."
- "How Do I Add A New Property Use to An Existing Property."

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Example: Adding a Separate Use Type for Vacant Space

Add Property Use For Durango Office Building
 Office refers to buildings used for the conduct of commercial or governmental business activities.

Gross Floor Area (GFA) should include all space within the building(s) including offices, conference rooms, basements, storage areas, stairways, and elevator shafts.

If you have restaurants, retail, or services (dry cleaning) within the Office, you should not use this use type. There are 4 exceptions to this rule when you should separate out a separate Property Use:

- If it is a Property Use Type that can get an ENERGY STAR Score (note: Retail can only get a score if it is greater than 1,000 square feet)
- If it accounts for more than 20% of the property's GFA
- If it is a vacant/unoccupied Office
- If the hours of operation differ by more than 10 hours from the main Property Use

Click on Property Use

Use Name: **Vacant Office Space**

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	0	1/1/1888	
Weekly Operating Hours	0	1/1/1888	
Number of Workers on Main Shift	0	1/1/1888	
Number of Computers	0	1/1/1888	
Percent That Can Be Heated	50 % or more	1/1/1888	
Percent That Can Be Cooled	50 % or more	1/1/1888	

Save Use

11

- The first thing you may want to do is to rename the space to distinguish it as vacant space and then, “Save Use.”
- When defining the Property Use Details for vacant space, you will enter zero for gross floor area, weekly operating hours, number of computers, number of workers. Select the appropriate percent of the vacant space floor area that can be heated and cooled, typically 50% or more.
- The “Current as Of” date will default to the year built. Do not change this date.

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Example: Adding a Separate Use Type for Vacant Space

The screenshot displays the 'Property Uses and Use Details' section of the ENERGY STAR Property Manager interface. It features a table with the following data:

Name	Property Use Type	Gross Floor Area	Action
Building Use	Office	100,000 SF	Learn More
Vacant Office Use	Office	0 SF	Learn More

Below the table, the 'Property GFA (Buildings)' is 100,000 and the 'Property GFA (Plants)' is 0. A pie chart titled 'Property GFA by Use' shows 100% for 'Office'. The 'Property Type' section shows 'Property Type - Self-Reported: Office' and 'Property Type - GFA Calculated: Office'. The EPA logo is in the bottom left corner, and the number 12 is in the bottom right corner.

- The result is a record that includes both property uses, the occupied office space and the vacant office space. Now that the vacant space is added, the next step will be to update the vacant space with the correct square footage. We'll do this next.
- But first, note that we have focused on the specific example of adding another Property Use to reflect vacant space in a building. But the same process holds any time you need to add an additional Property Use: first, make sure that you really need to break out that Property Use; next, use the "Add Another Type of Use" function to set up the new Property Use; and finally, do a double-check to make sure that the gross floor area of your uses ("Property GFA (Buildings)") matches the Gross Floor Area you initially entered when setting up the building ("Property GFA – Self-Reported"). In this example, there is no discrepancy because we've entered "0" for the vacant space square footage. As we update the square footage to reflect the fluctuation in vacant space, a discrepancy will occur. If there is a discrepancy, an alert will appear and will prompt you to make sure to update or correct the record as necessary. We'll talk about this in the next section.



How To

- Edit property data
- **Correct or update property use details**
- Use the Data Quality Checker
- Share property data

Now, we will discuss correcting and updating Property Use Details.



Correct vs. Update

- If you need to make edits to your property use details, you can either “Correct Mistakes” or “Update with New Information”
- “Correct Mistakes” changes a value that was entered in error
 - No historical record of the old value will be kept or factored into your metrics
- “Update with New Information” tracks a value that is changing over time
 - Enter date as of which the new value took effect, so that the tool can account for this

- If you need to make edits to your Property Use Details, you can either “Correct Mistakes” or “Update with New Information.”
- The key difference is that you would use “Correct Mistakes” to change a value that was entered in error. No historical record of the old value will be kept or factored into your metrics.
- You would use “Update with New Information” to track a value that has changed over time. When updating a value, you indicate the date as of which the new value took effect, so that the tool can account for this. Updating information like parking areas works the same way as updating any other space type.

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Edit Property – Update with New Information

Scenario
10,000 sq. ft. of space is vacated

Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use

Name	Primary Function	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft ²	I want to...
▶ Vacant Office Space	Office	0 ft ²	I want to...
Property GFA (Buildings):		100,000	Update with New Information
Property GFA (Buildings and Parking):		100,000	View Update History
			Correct Mistakes
			Delete use

[To add multiple uses and buildings to this property, you can use this spreadsheet template to upload your information.](#)

SEPA

15

- We're going to start with "Update with New Information" to correctly account for the vacant space we added in the last step.
- From the Action drop down menu next to the Property Use that needs to be changed, select "Update with new Information."

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Edit Property – Update with New Information

Update Property Use Details

It is important to keep the information about how your property is used up-to-date since this information is used to calculate your performance metrics. Updates that you make here are tracked as part of the [History Log](#). To correct an error that you find, use the [History Log](#). Note: you do not need to provide any new information for details you aren't updating.

Property Use Name:

Type of Use:

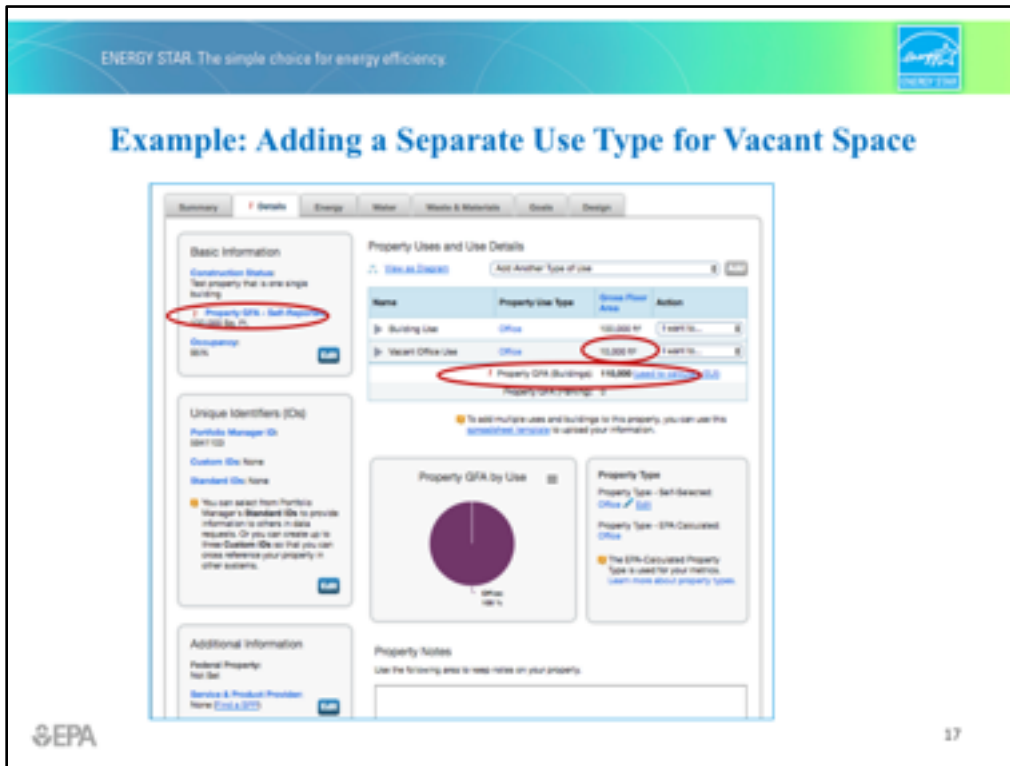
Detail	Current Value	Updated Value	Current As Of	Temporary Value
Gross Floor Area	0 Sq. Ft. (as of 01/01/1980)	10000 <input type="text"/> Sq. Ft.	01/01/1980 <input type="text"/>	<input type="checkbox"/>
Weekly Operating Hours	0 (as of 01/01/1980)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
Number of Workers on Main Shift	0 (as of 01/01/1980)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
Number of Computers	0 (as of 01/01/1980)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
Percent That Can Be Heated	0% or more (as of 01/01/1980)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
Percent That Can Be Cooled	0% or more (as of 01/01/1980)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>

This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

If your property has more than one building, it is important that you keep your property use details (if workers, hours of operation) updated at both the property and building/levels so that your ENERGY STAR score and metrics are accurate. [Learn more about property use details on 1-100.](#)

SEPA 16

- Next, select the “Updated Value” box to update the gross floor area to reflect the amount of vacant space. For “Current as Of” note the date the space became vacant.
- No change is required to the value or date for weekly operating hours and number of workers and computers if these remain “0”, which is likely for vacant space.
- Then select, “Save Update.”



- Once the update is saved, you will notice that Portfolio Manager displays a gross floor area that is different from the number you entered. This is not an error. The difference occurs because the gross floor area is a time weighted average of the varying sq. ft. over the selected period. For more information: <https://portfoliomanager.zendesk.com/hc/en-us/articles/211696587-What-does-time-weighted-mean->
- You will also notice that your property now appears to have more floor area than you originally indicated when setting up the property. This is indicated by the red exclamation point alerts next to “Property GFA (Buildings)” and “Property GFA – Self-Reported”. To address this error, a second update must be made to the main property use type to account for the loss of occupied space. In essence, you are “moving” square footage from one Property Use to another, so you need to reflect this in both property uses.

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Example: Adding a Separate Use Type for Vacant Space

Update Property Use Details

It is important to keep the information about how your property is used up-to-date since this information is used to calculate your performance metrics. Updates that you make here are tracked as part of the [ENERGY STAR](#) [History Log](#). To correct an error that you find, use the [ENERGY STAR](#) [History Log](#). Note: you do not need to provide any new information for details you aren't updating.

Property Use Name:

Type of Use:

Detail	Current Value	Updated Value	Current As Of	Temporary Value
Gross Floor Area	100000 Sq. Ft. (As of 01/01/1980)	<input type="text" value="90000"/> Sq. Ft.	3/1/2015	<input type="checkbox"/>
Weekly Operating Hours	60 (As of 01/01/1980)	<input type="text" value="55"/> <input type="checkbox"/> Use a default	3/1/2015	<input type="checkbox"/>
Number of Workers on Main Shift	220 (As of 01/01/1980)	<input type="text" value="200"/> <input type="checkbox"/> Use a default	3/1/2015	<input type="checkbox"/>
Number of Computers	200 (As of 01/01/1980)	<input type="text" value="200"/> <input type="checkbox"/> Use a default	3/1/2015	<input type="checkbox"/>
Percent That Can Be Heated	50 % or more (As of 01/01/1980)	<input type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	3/1/2015	<input type="checkbox"/>
Percent That Can Be Cooled	50 % or more (As of 01/01/1980)	<input type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	3/1/2015	<input type="checkbox"/>

This Use Detail is used to calculate the ENERGY STAR Score.


If your property has more than one building, it is important that you keep your property use details (if workers, hours of operation) updated at both the property and building levels so that your ENERGY STAR score and metrics are accurate. [Learn More About Building Use Details](#)

SEPA

18

- To make the second needed update to the main property use, select “Update with New Information” from the drop down box for the main property use type.
- On this screen, select the “Updated Value” box to update the gross floor area to reflect the accurate sq. ft. of occupied space. In this case, the gross floor for occupied space is 90,000, since 10,000 sq. ft. is now vacant. For “Current as Of” note the date that the value changed, which should be the same as the date that vacant space came open.
- The reduction in occupied space likely means the reduction of weekly operating hours, number of workers, and number of computers. Update these values and the “Current As Of” date accordingly.
- Then select, “Save Update.”

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Edit Property – Update With New Information

Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use Add

Name	Primary Function	Gross Floor Area	Action
▼ Building Use	Office	98,329 SF	I want to...
Value Current As Of Temporary Value?			
Gross Floor Area	90000 SF	08/01/2015	No
Weekly Operating Hours	55	08/01/2015	No
Number of Workers on Main Shift	200	08/01/2015	No
Number of Computers	200	08/01/2015	No
Percent That Can Be Heated	50 % or more	08/01/2015	No
Percent That Can Be Cooled	50 % or more	08/01/2015	No
▼ Vacant Office Space	Office	1,671 SF	I want to...
Value Current As Of Temporary Value?			
Gross Floor Area	10000 SF	08/01/2015	No
Weekly Operating Hours	0	01/01/1985	No
Property GFA (Buildings):		100,000	used to calculate EUI
Property GFA (Buildings and Parking):		100,000	

SEPA

19

Updated Gross Floor Area

Updated Gross Floor Area

- On the property details page, use the arrow to expand the spaces and notice that your updates have been accepted and the “current as of dates” are reflected in your Property Use Details.

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Example: Adding a Separate Use Type for Vacant Space

Example of a property accurately set up, accounting for vacant space

The screenshot displays the 'Property Uses and Use Details' section of the ENERGY STAR Property Manager. It features a table with the following data:

Name	Property Use Type	Gross Floor Area	Action
Building Use	Office	10,000 SF	▼ + Add SF
Vacant Office Use	Office	10,000 SF	▼ + Add SF

Below the table, a pie chart titled 'Property GFA by Use' shows 'Office' at 100%. To the right, the 'Property Type' is listed as 'Self-Reported Office'.

Red circles in the original image highlight the 'Property GFA - Self-Reported' field in the 'Basic Information' section and the 'Property GFA (Buildings)' row in the table, which shows a value of 10,000. The 'Property GFA - Self-Reported' field also shows 10,000 SF.

SEPA

20

- Once you have edited your Property Uses to reflect the appropriate Gross Floor Area and other use details, you will have an accurate record of occupied and vacant space. Note that the red exclamation point alerts are gone and that “Property GFA (Buildings)” and “Property GFA – Self-Reported” now match.
- As time goes on and more floor space gets leased, you can go through this process again to update vacant and occupied space accordingly.
- If your property becomes fully rented with no vacancies, keep the Vacant Property Use, just change the GFA to 0.

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Edit Property – Correct Mistakes

Scenario: Incorrect sq. ft. for vacant space entered

Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use Add

Name	Primary Function	Gross Floor Area	Action
▶ Building Use	Office	96,329 sq ft	I want to...
▶ Vacant Office Space	Office	1,671 sq ft	I want to...
Property GFA (Buildings):		100,000 (Used)	I want to...
Property GFA (Buildings and Parking):		100,000	I want to...

Update with new information
View Update History
Correct Mistakes
Delete use

SEPA 21

- Now, let's say that we need to correct data that was entered in error. For example, let's say that instead of just 10,000 sq. ft., we actually have 20,000 sq. ft. of vacant space.
- To fix the error, select "Correct Mistakes" next to Vacant Office Space.

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Edit Property – Correct Mistakes

History Log for Vacant Office Space

Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (pump), you need to [update these Property Use Details in BOTH the parent AND child properties.](#)

Gross Floor Area

Current As Of	Value	Temporary Value?	Revised By	Revised Date
08/01/2015 (to present)	10000 Sq. Ft.	<input type="checkbox"/>	Eric Smith	10/16/2015
01/01/1985 (through 7/31/2015)	0 Sq. Ft.	<input type="checkbox"/>	Eric Smith	10/16/2015

[Delete Selected Entries](#)

Weekly Operating Hours

Current As Of	Value	Temporary Value?	Revised By	Revised Date
01/01/1985 (to present)	0	<input type="checkbox"/>	Eric Smith	10/16/2015

[Delete Selected Entries](#)

Number of Workers on Main Shift

Current As Of	Value	Temporary Value?	Revised By	Revised Date
01/01/1985 (to present)	0	<input type="checkbox"/>	Eric Smith	10/16/2015

[Delete Selected Entries](#)

 [Save Corrections](#) 22

- Next, correct the “Value” for the gross floor area, in this case from 10,000 to 20,000 sq. ft. The “Current as Of” date will not change, nor will any of the other property use details.
- Then select, “Save Corrections.” The old value will not be saved and the new, correct value will be in effect.

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Edit Property – Correct Mistakes

Summary Details Energy Water Waste & Materials Costs Design

Basic Information
 Construction Status
 Not a property that is one single building
 Construction Start Date
 12/22/2017
 Occupancy
 88%

Property Uses and Use Details
 View All Details Add Another Type of Use Add

Name	Property Use Type	Gross Floor Area	Action
Building Use	Office	90,000 SF	1 edit icon
Vacant Office Use	Office	29,888 SF	1 edit icon
Property GFA (Buildings)		119,888 sq ft	1 exclamation point icon
Property GFA - Self-Reported		0	1 exclamation point icon

To add multiple uses and buildings to this property, you can use the [add multiple buildings](#) to extend your information.

Property GFA by Use

Property Type
 Property Type - Self-Reported
 Office ✓
 Property Type - EPA-Calculated
 Office
 The EPA-Calculated Property Type is used for your metrics. [Learn more about property types.](#)

Additional Information
 Federal Property
 Yes
 Service & Product Provider
 None (EPA 2023)

Property Notes
 Use the following area to keep notes on your property.

SEPA 23

- You will notice again that your property now appears to have more floor area than you originally indicated when setting up the property. This is indicated by the red exclamation point alerts next to “Property GFA (Buildings)” and “Property GFA – Self-Reported”. To address this error, a second correction must also be made to the main property use type.

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Edit Property – Correct Mistakes

History Log for Building Use

Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (multiple), you need to [update these Property Use Details in 2021 for the parent and child properties](#).

Gross Floor Area

Current As Of	Value	Temporary Value?	Revised By	Revised Date
08/01/2015 (to present)	90000 <input type="text"/> Sq. Ft.	<input type="checkbox"/>	Eric Smith	10/16/2015
01/01/1985 (through 7/31/2015)	100000 <input type="text"/> Sq. Ft.	<input type="checkbox"/>	Eric Smith	10/16/2015

Weekly Operating Hours

Current As Of	Value	Temporary Value?	Revised By	Revised Date
08/01/2015 (to present)	55 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015
01/01/1985 (through 7/31/2015)	55 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015

Number of Workers on Main Shift

Current As Of	Value	Temporary Value?	Revised By	Revised Date
08/01/2015 (to present)	200 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015
01/01/1985 (through 7/31/2015)	200 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015

Save Corrections

- To make the second correction to the main property use, select “Correct Mistakes” from the drop down box for the main property use type.
- On this screen, correct the “Value” for the gross floor area for the most recent value, in this case from 90,000 to 80,000 sq. ft. of occupied space because 20,000 sq. ft. is vacant. The “Current as Of” date will not change, though you may need to correct the other use details if they were also entered in error.
- Then select, “Save Corrections.” The old value will not be saved and the new, correct value will be in effect.

Edit Property – Correct Mistakes

Property Uses and Use Details

[View as Diagram](#)

Name	Primary Function	Gross Floor Area	Action
▼ Building Use	Office	96,658 sq'	I want to...
	Value	Current As Of	Temporary Value?
Gross Floor Area	80000 sq'	06/01/2015	No
Weekly Operating Hours	55	06/01/2015	No
Number of Workers on Main Shift	200	06/01/2015	No
Number of Computers	200	06/01/2015	No
Percent That Can Be Heated	50 % or more	06/01/2015	No
Percent That Can Be Cooled	50 % or more	06/01/2015	No
▼ Vacant Office Space	Office	3,342 sq'	I want to...
	Value	Current As Of	Temporary Value?
Gross Floor Area	20000 sq'	06/01/2015	No
Weekly Operating Hours	0	01/01/1985	No
Property GFA (Buildings):		100,000	(click to calculate EUI)
Property GFA (Buildings and Parking):		100,000	

- On the property details page, use the arrow to expand the space use types and notice that the corrections have replaced the old values.



- Once you have corrected your Property Uses to reflect the correct Gross Floor Area and other use details, note that the red exclamation point alerts are gone and that “Property GFA (Buildings)” and “Property GFA – Self-Reported” now match.
- As you update and correct information in Portfolio Manager, make sure that you address alerts noting discrepancies between the “Property GFA (Buildings)” and “Property GFA – Self-Reported.”
- And remember, if you need to make edits to your property use details like we’ve done in these examples, you can either “Correct Mistakes” or “Update with New Information.” The key difference is that you will use “Correct Mistakes” to change a value that was entered in error. No historical record of the old value will be kept or factored into your metrics. You would use “Update with New Information” to track a value that has changed over time. When updating a value, you indicate the date as of which the new value took effect, so that the tool can account for this.



Correcting/Updating Properties with Multiple Buildings (Campuses)

- In a campus setting, you will need to update/correct use details at both the property level and at the building level
- If you make a change at the building level, it will not automatically “roll up” to the property level

- One thing to note if you are benchmarking a campus is that you will need to make any updates or corrections at both the individual building level, as well as at the property level. If you make a change to data at the building level, it will not automatically roll up to the property level.
- So if you have a property in a campus layout, be sure to check the details at the property level each time you make a building-level edit to Use Details.
- For more information, please see the related FAQ at <http://portfoliomanager.supportportal.com/ics/support/KBAnswer.asp?questionID=34488>. Also, see the “How to Benchmark a Campus” guide, available at <http://www.energystar.gov/buildings/tools-and-resources/how-benchmark-campus>.



How To

- Edit property data
- Correct or update property use details
- [Use the Data Quality Checker](#)
- Share property data

Now we will take a look at some of the “alert” functionalities in the tool.



Address Data Quality Alerts

- Portfolio Manager includes built-in features to help users input data correctly, such as:
 - Alerts
 - Tips
 - Easily accessible definitions
- Intended to help catch common data entry mistakes

- You have likely noticed that Portfolio Manager provides guidance in the form of alerts, tips and easily accessible definitions that are intended to prevent common data entry mistakes.

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Gross Floor Area Alert

Summary Details Energy Water Waste & Materials Goals Design

Basic Information
 Construction Status:
 Test property that is one single building

! Property GFA - Self-Reported: 100,000 Sq. Ft.

Occupancy: 95%

Property Uses and Use Details

Virtual Design Add Another Type of Use Add

Name	Property Use Type	Gross Floor Area	Action
Building Use	Office	100,000 sq ft	I want to...
Vacant Office Use	Office	10,000 sq ft	I want to...

! Property GFA (Buildings): 110,000 Edit to reconcile GFA

Gross Floor Area originally entered as 100,000 sq. ft. for this property

When "Vacant Space" was added, the Gross Floor Area went up to 110,000 sq. ft.

Edit Property GFA to equal 110,000 sq. ft. to keep total floor area consistent

EPA 30

- For example, if the Gross Floor Area that you entered for the property when setting it up initially is different than the sum of the Gross Floor Area of the Property Uses, then an exclamation point will indicate the Gross Floor Area Alert in Basic Information and in Property Uses and Use Details.
- You can continue to work with your property without immediately addressing this discrepancy – however, if you go to apply for the ENERGY STAR label and there is still an inconsistency in your Gross Floor Area, you will need to fix this.

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Meter Data Alerts

Manage Bills (Meter Entries) for **Supermarket A-1**

You may select one of your meters to get started. Or, if you are coming here from your meter list, a meter may already be selected.

Electricity has an overlap where 10/1/2020 precedes 10/10/2020. Please remove the overlap by adjusting the dates of your energy bills. For help, see this [FAQ](#).

Electricity has a gap of 20 days between the dates of 11/30/2020 and 01/05/2021. Please close the gap by adjusting the dates of your energy bills. For help, see this [FAQ](#).

Electricity

Display Years: 2020 21 Show All Years 21


Start Date	End Date	Usage kWh (Thousand Watt Hours)	Cost (\$)	Estimation	Green Power	Last Updated
8/1/2020	8/9/2020	388,700				8/10/2020 Not a bill
Electricity has an overlap where 10/1/2020 precedes 10/10/2020. Please remove the overlap by adjusting the dates of your energy bills. For help, see this FAQ .						
8/1/2020	8/30/2020	427,800				8/10/2020 Not a bill
10/1/2020	10/31/2020	388,840				8/10/2020 Not a bill
11/1/2020	11/30/2020	384,360				8/10/2020 Not a bill
Electricity has a gap of 20 days between the dates of 11/30/2020 and 01/05/2021. Please close the gap by adjusting the dates of your energy bills. For help, see this FAQ .						
1/5/2021	2/3/2021	354,360				8/10/2020 Not a bill
2/4/2021	3/3/2021	357,360				8/10/2020 Not a bill

SEPA

31

- Similarly, Portfolio Manager will identify issues with your meter data. Specifically, any gaps or overlaps in your meter entries will be called out.
- Alerts will be shown at the top of the page as well as below the row that needs to be edited.
- To address these alerts, simply click on the table to make the changes or at the bottom of the page click “add an entry” to enter a new line of information.
- You will be able to move on from this page even if the data alerts have not been addressed. If gaps and overlaps exist in a meter, you will see a yellow alert next to the meter name on the Meters tab. This is intended to call out to users which meters have errors. This saves you the trouble of going in to each meter and searching for data issues.

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Data Quality Checker

Summary Details Energy Water Waste & Materials Goals Design

Notifications (0)
You have no new notifications.

Property Profile [\(Changes coming Fall 2017\)](#)
This section will be deleted in the Fall of 2017, except for the property photos which will remain. [View information.](#)
[Create Profile](#)

Source EUI Trend (kBtu/ft²)



Metrics Summary [Change Time Period](#)

Metric	Dec 2014 (Energy Baseline)	Mar 2017 (Energy Current)	Change
ENERGY STAR score (1-100)	1	1	00.0%
Source EUI (kBtu/ft ²)	811.1	727.0	-84.1% (-10.4%)
Site EUI (kBtu/ft ²)	326.4	263.4	-63.0% (-19.3%)
Energy Cost (\$)	\$81,581.78	\$40,588.06	-4092.73% (-7.5%)
Total GHG Emissions (Metric Tons CO2e)	3,337.4	2,941.4	-396.0% (-11.9%)
Water Use (All Water Sources) (gpd)	3,373.9	3,228.1	-145.8% (-4.3%)
Total Waste (Recycled and Diverted) (lbs)	879.99	836.75	-43.24% (-4.9%)

Check for Possible Data Errors

Run a check for any 12-month time period to see if there are any possible errors found with your data.

[Check for Possible Errors](#)

SEPA

32

- Another feature to identify erroneous or anomalous data is the Data Quality Checker. This tool reviews all entries for an individual property to identify problems with meter data, property use details, and property information.
- From the Summary tab of any property record, select “Check for Possible Errors” to get started.



- The Data Quality Checker checks a “Metric Year” which is a 12-month time period because all metrics are based on 12 months of data.
- Select the Year Ending date using the drop down options and click Run Checker.
- The checker will scan your property and immediately return the results. Expand each alert using the dropdown arrow to see a summary of the issue and a description of how to fix it:
 - A green thumbs up means there are no issues.
 - An exclamation point and yellow yield sign indicates atypical data, e.g., unusually high or low values. If you receive an alert like this, but you know the information is correct, you can ignore the alert.
 - An exclamation point and red stop sign indicates that data is incomplete or missing. This type of alert will likely prevent metrics from calculating and the issue should be resolved as soon as possible.
- The checker runs the same checks that are used during the ENERGY STAR Certification process so it’s a good idea to use the Data Quality Checker if you’re interested in certification and, generally to have more confidence in your building metrics.



How To

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

That complete are third objective. Now, we will learn how to connect and share data with other Portfolio Manager users.



3 Steps to Sharing Properties

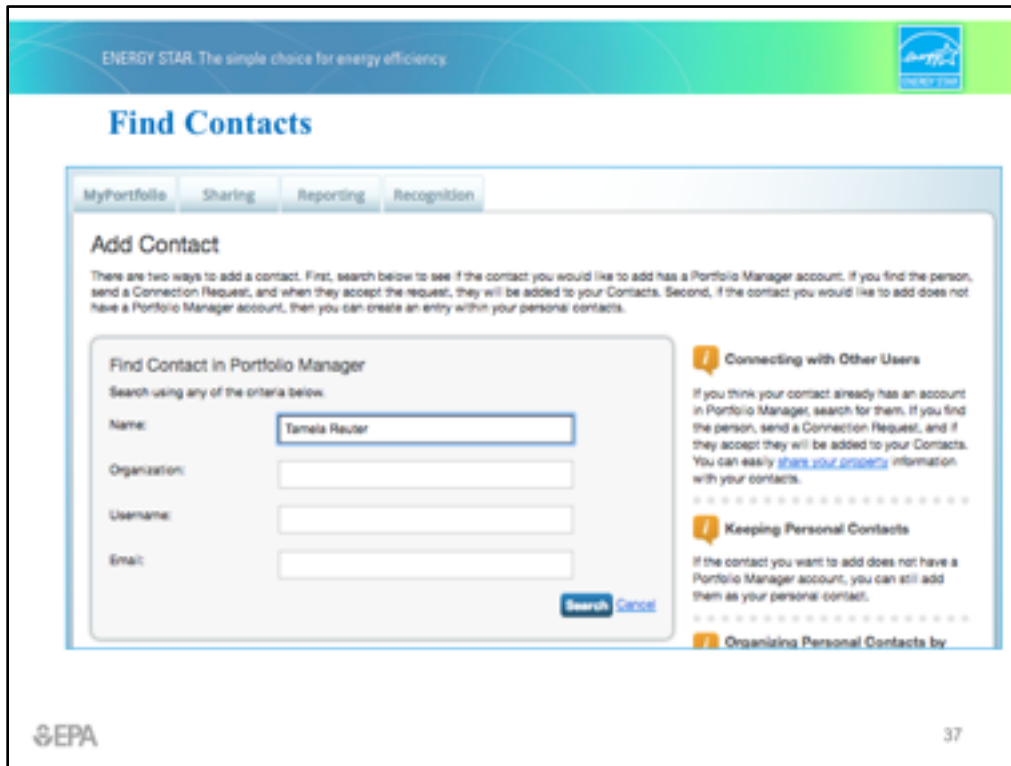
1. Confirm you are connected to the person you want to share with on the Contacts page. If needed, send a connection request by clicking on "Add Contact"
2. Share one or more of your properties with your connected contacts & specify the level of access the contacts have to view and edit your properties
3. Review shared properties on the **Sharing** tab

Note: You can reference the 5 minute video, "How to Share Properties in Portfolio Manager" at www.energystar.gov/buildings/training as a refresher, if needed.

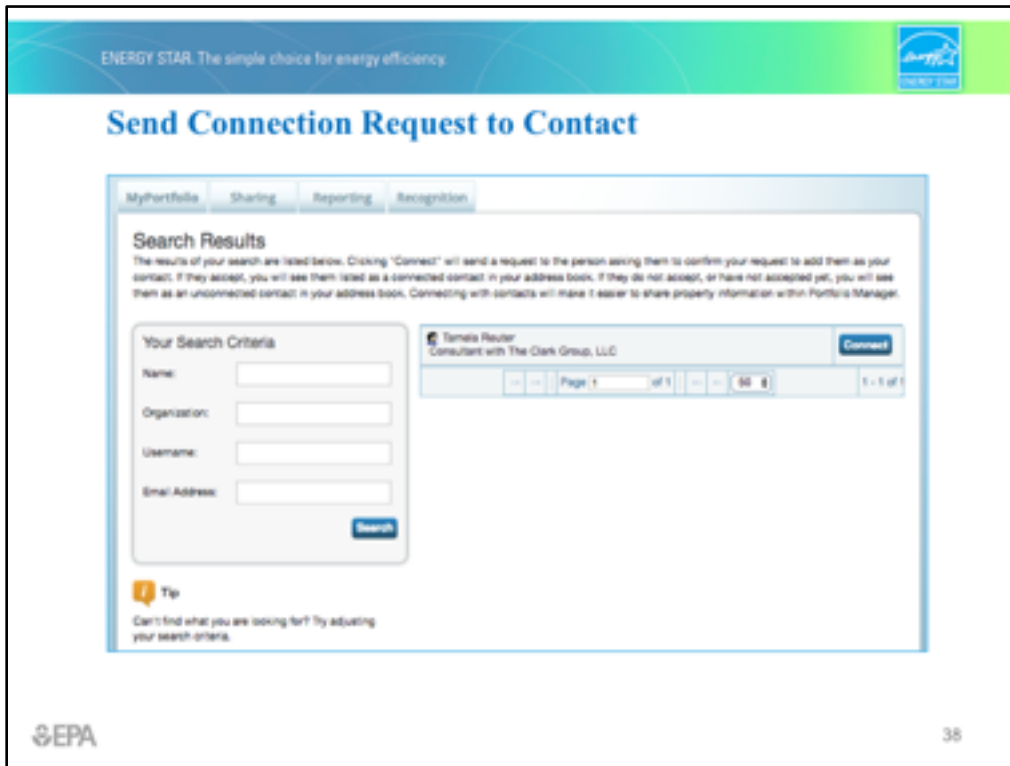
- Sharing allows you to share a property record with another Portfolio Manager for viewing, reporting, and in some cases editing.
- Sharing is broken up into 3 steps: (1) connect with a Portfolio Manager user; (2) share one or more properties with one or more connected contacts, at a specified level of access; and (3) easily check/review your sharing settings for every building in your portfolio – and make changes/edits as necessary.



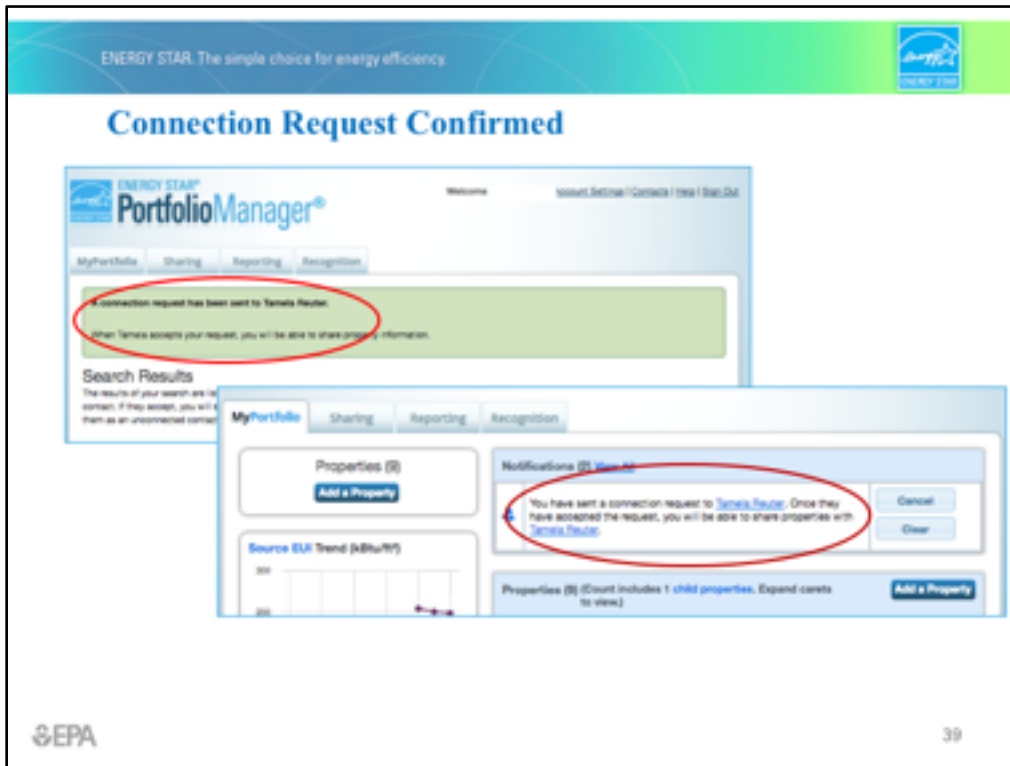
- The first step is to “connect” with the PM user with whom you wish to share. To do this, go to the “contacts” link in top right corner of any Portfolio Manager page.
- The “My Contacts” page will display your current contact list. The list includes two types of contacts: contacts you have manually added to your contacts list and contacts with whom you are connected via Portfolio Manager. “Connected” contacts are indicated by a chain link icon.
- Select “Add a Contact” to search for users to connect with.



- From this page, you will be able to search for other Portfolio Manager users (i.e., established PM accounts) by name, organization, username or email.
- If you are trying to connect to a user and they are not coming up in the search, please ask them to look at the Preferences tab under Account Settings to make sure that they are “searchable.” The default setting for all existing Portfolio Manager accounts is to be “searchable.” However, this can be changed under Account Settings in the top right hand corner of any Portfolio Manager page.
- On the bottom of the Add Contact page, you can also simply add a contact to your address book by typing in their name and contact information, however, this is not the same thing as making a connection request. One example of a situation where you may want to add a contact without actually connecting with them is if you’re working with a licensed professional to obtain ENERGY STAR Certification. Adding them to your address book will allow you to select the provider when completing the online application.



- After searching for a user to make a connection in order to share a property record, from the “Search Results” page, select the user with whom you wish to connect.
- The search results will display the users’ name above their title and organization. It does not display their username.
- To send a connection request, click the “connect” button next to your contact’s name.



- Once the connection request has been sent, you will receive a confirmation notice.
- But, you can't share a property until the contact accepts your request.



- Here is what your contact will see upon receiving a sharing request. They will have the opportunity to accept or reject your request and you will receive a confirmation of the action that they took.



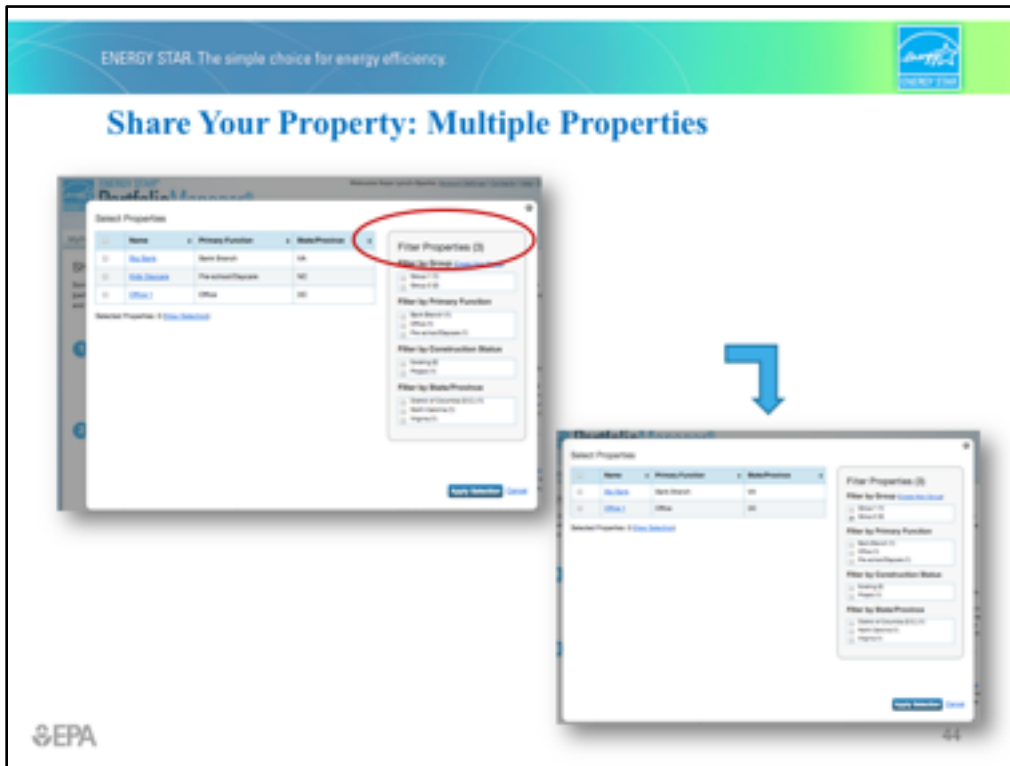
- Once your contact has accepted your connection request, you will receive a confirmation.



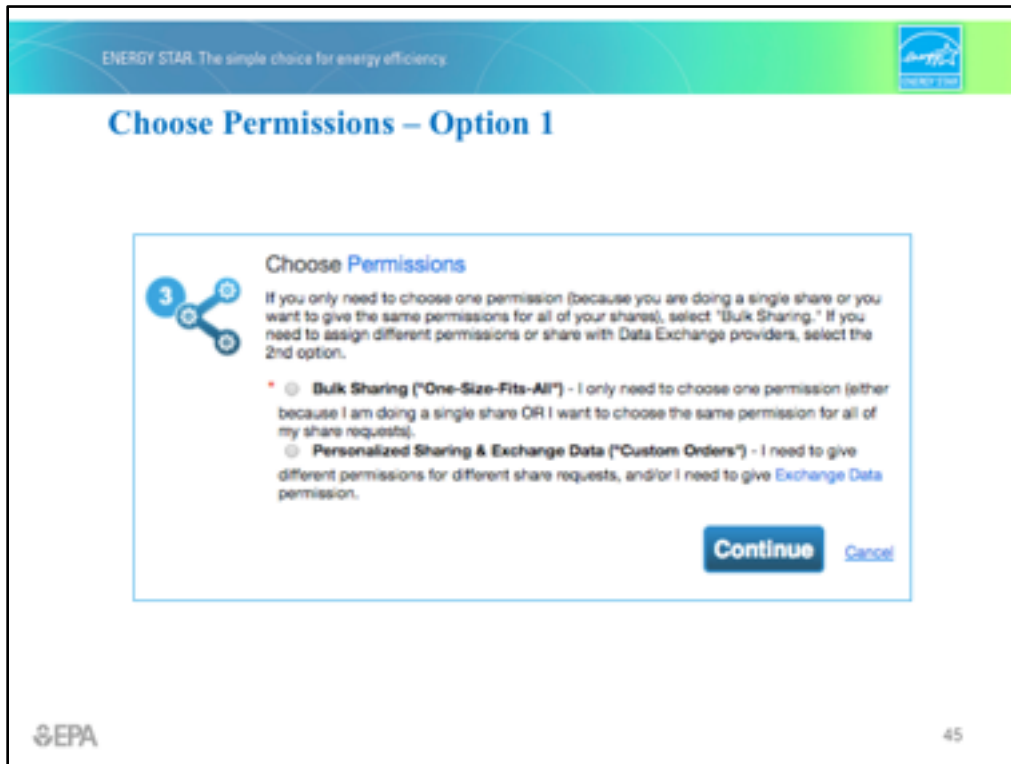
- Once you are connected with your contact, click on the “Sharing” tab and start by clicking “Share (or Edit Access to) a Property.”
- Or, if you are interested exchanging data via web services with a third party service provider or utility, select “Set Up Web Services/Data Exchange”.



- Next, you will be taken to the “Share Your Properties” page.
- From here, you will choose from a drop down menu which properties you wish to share. You have the option to share one property, to select multiple properties, or to share all properties.
- On this page, you will also be asked to select one or more connected contacts with whom you would like to share. You can select multiple names at once by holding the “Control” key as you click names.



- If you select multiple properties, a pop up window will allow you to filter and select the specific properties you want to share.
- You can filter by region or building type, or use the check boxes to select one property at a time. You can also “Filter By Group,” if you have created one or more groups and assigned properties to these groups
- When you are done, click “Apply Selection.”



- After selecting which properties and contacts, the next step is to assign permissions, in other words, to assign users a particular level of access to the property record.
- You can choose “Bulk Sharing” if you have a single share OR if you’re giving the same permissions for all of your shares.
- With this option, you will choose one of 3 access levels (read-only, full, or custom).
- Read only access means that your contact can look at your property data and include the property in their reports, but they will not be able to edit or update any of the Property Use Details or meter consumption details.
- Full access allows your contact to make any edits to property.
- Custom access allows you to select different levels of access for different aspects of your property record. For example, you can specify full access for some meters but not others; or can provide full access to meters, but read-only access to Goals.

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Choose Permissions – Option 2

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 to shares with different recipients, select the "Personalized Sharing" option.

Bulk Sharing (One-Size-Fits-All) – only need to choose one permission (either because you're doing a single share OR want to choose the same permission for all of your shares)
 Personalized Sharing (Exchange Data / Custom-Share) – need to give different permissions for different share recipients, and/or need to give [exchange data](#) permission.

Click arrow to show/hide permission options

Choose permissions

MyPortfolio | Sharing | Reporting | Recognition

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.

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.
- Data Exchange** – You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Name (2)	None	Read Only Access	Full Access	Custom Access	Exchange Data
Real Estate (Private)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ENERGY STAR TRAINING ENERGY STAR (Training)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
ENERGY STAR TRAINING ENERGY STAR (Training)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Share Property(ies) Cancel

SEPA 46

- Choose “Personalized Sharing” if you need to assign different access rights across different properties/contacts. This option allows you to assign specific access rights across each property record and user.
- “None” is offered as an option you have selected multiple contacts to share multiple properties, but certain contacts don’t need access to certain properties.
- “Custom Access” allows you to grant different permissions for different parts of each property record, e.g., the property information, meter information, goals, improvements, and recognition. It’s also here where you will find the option to allow the shared user to “share forward.” We’ll talk more about this is just a bit.

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Sharing Notifications Appear in Both Accounts

The image shows two screenshots of the Energy Star MyPortfolio interface. The top screenshot is from the perspective of the user who shares a property. It shows a 'My Shared Properties (0)' section with buttons for 'Share on All Access to Property', 'Get My Web Services Data Exchange', and 'Download Sharing Report'. To the right, a 'Sharing Notifications (1)' box contains a notification for 'Hotel Building 1 - Sharing request sent to ENERGY STAR TRAINING' with 'Cancel' and 'Clear' buttons. A red arrow points from the text 'User who shares a property receives a notification' to this notification. The bottom screenshot is from the perspective of the user with whom a property is shared. It shows a 'My Shared Properties (1)' section with the same buttons. To the right, a 'Sharing Notifications (1)' box contains a notification for 'Hotel Building 1 - Shared from Andrew Schulte (Full Access)' with 'Accept' and 'Reject' buttons. A red arrow points from the text 'User with whom a property is shared also receives a notification' to this notification. The EPA logo is in the bottom left, and the number 47 is in the bottom right.

User who shares a property receives a notification

User with whom a property is shared also receives a notification

47

- Once you've completed your sharing request, sharing notifications appear in both accounts (sharer and recipient).
- Sharer will see a confirmation that request was sent.
- Recipient has option to accept or reject.
- NOTE: if you share a property and then "clear" the notification telling you that you have shared, it will be removed from your Notifications box. You can later cancel this share (or remove access if they have already accepted), from that property's Summary tab, in the "Sharing This Property" box.



- Once your contact has accepted your sharing request, they will show up in your list of shared properties on the “Sharing” tab.
- You can sort the Sharing Table by contact or by property. Either way, you will be able to view information regarding the sharing status of every property, including who has access to the property, what specific permissions they have.
- Using the “Action” drop-down menu, you will be able to view and (in some cases) edit the sharing settings that have been assigned to each contact for each building. Your ability to edit another user’s permission levels will depend on the access rights that you have. [See next slide]
- Everyone who has access can see the names of *everyone else* with access, regardless of your specific permissions



Sharing Rules: Granting and Editing Access

Access Level	Ability to Edit Share Permissions
Property Data Administrator	Can edit anyone's sharing permissions
Full Access	Can edit anyone's sharing permissions except for the Property Data Administrator
Read Only	Cannot edit anyone's access
Custom	Can only edit sharing permissions for those people with whom they directly shared
Exchange Data	Can only edit sharing permissions for those people with whom they directly shared

→ *No one can edit access for the Property Data Administrator*

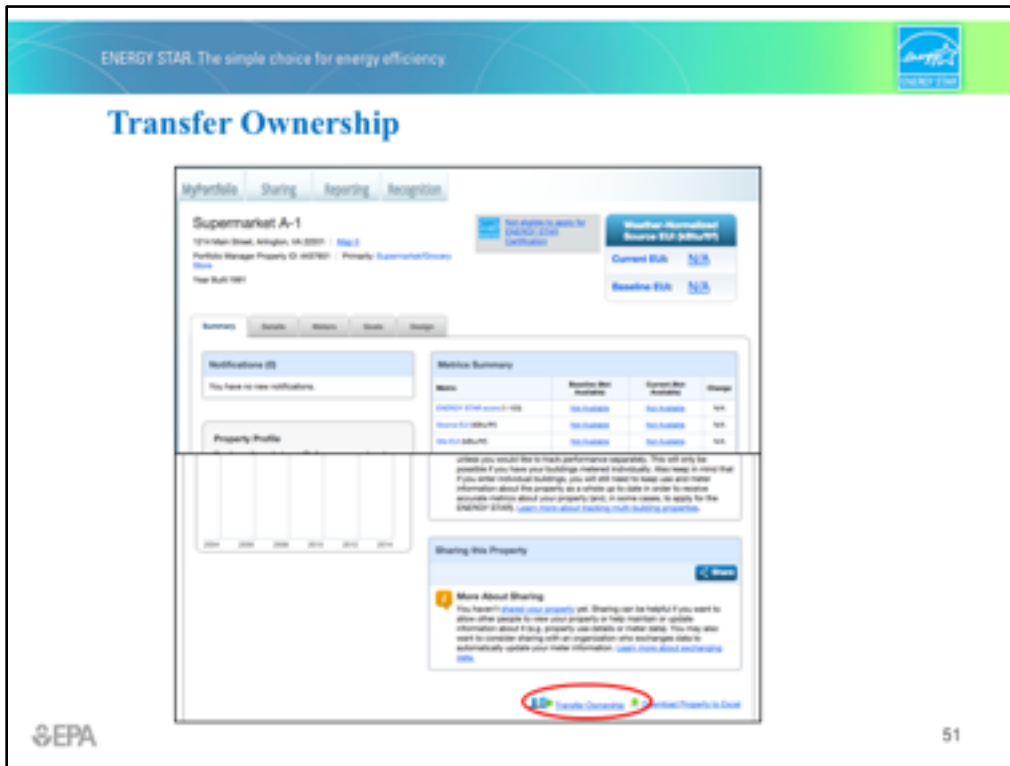
- This information is provided within Portfolio Manager, but is summarized here for your convenience.



Share Forward

- Full Access
 - *Always* includes the ability to share forward
- Read Only Access
 - *Never* includes the ability to share forward
- Custom Access
 - Ability to share forward is an optional right
 - *You choose* if you want people to share forward
- Exchange Data
 - Ability to share forward is an optional right
 - *You choose* if you want people to share forward

- You can “re-share” or “share forward” a property that has been shared with you – as long as you have the right permission. This slide summarizes the “share forward” capability associated with each sharing access level. When sharing a property with a recipient, consider whether they may need to share the property forward, and take this into account when assigning access levels.



- The Transfer Ownership link, located at the bottom of the Property Summary tab, allows users to transfer individual properties between accounts. This is not the same as sharing a property with Full Access. Transferring ownership removes a building from one account and places it in another user's complete control. You can only transfer ownership of a building if you are its Property Data Administrator – essentially the “owner” of the building in Portfolio Manager.
- There is also a link to transfer ownership in the Manage Portfolio menu in the bottom left corner of the MyPortfolio tab.



- Note: when you transfer ownership of a property all of the “shares” for that property will stay intact.
- One last note about sharing and transferring: If you need access to an existing building record in Portfolio Manager, but the property data administrator for that record is unknown or cannot be reached, EPA can transfer the properties on behalf of the former owner **IF** we can verify in the database that both accounts are registered under the same company. If not, the property record may need to be recreated. Contact the help desk using the link in the top right hand corner to inquire as to your options. These FAQs provide more information:

<https://portfoliomanager.zendesk.com/hc/en-us/articles/211028858-Someone-left-my-company-how-can-I-get-access-to-their-buildings-in-Portfolio-Manager->

<https://portfoliomanager.zendesk.com/hc/en-us/articles/211698277-How-do-I-get-access-to-a-property-my-organization-has-recently-acquired->



Recap

- In this training, we learned how to:
 - Edit property data
 - Correct or update property use details
 - Use the Data Quality Checker
 - Share property data

- In conclusion, we have touched on the following topics today: [read slide]



- At any time, you can click on “Help” in the upper right-hand corner of any Portfolio Manager screen to be taken to the help page. From here you can access:
 - “How To” guides and other printed resources
 - FAQs
 - The Portfolio Manager Glossary
 - Registration for live trainings/webinars
 - Recorded trainings
 - Form to submit questions & technical issues
 - Portfolio Manager technical references/documentation
 - Web services documentation



Extra Help

- Visit www.energystar.gov/buildingshelp
 - Expanded list of FAQs
 - Online form to submit technical questions or comments
- Additional Portfolio Manager training resources available at: www.energystar.gov/buildings/training
 - Step-by-step documents (PDF)
 - Access to recorded trainings
 - Information on upcoming trainings
- Register for regular webinars at: <http://esbuildings.webex.com>
- Portfolio Manager Technical Reference Series:
http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfolio_omanager_model_tech_desc

- You can also access many of these resources from the links provided above. You don't have to be logged in to Portfolio Manager to access this information.



Thank you for attending!

Questions?

If after this webinar you have any questions on Portfolio Manager, contact us at:

www.energystar.gov/BuildingsHelp