



Using ENERGY STAR® Portfolio Manager®

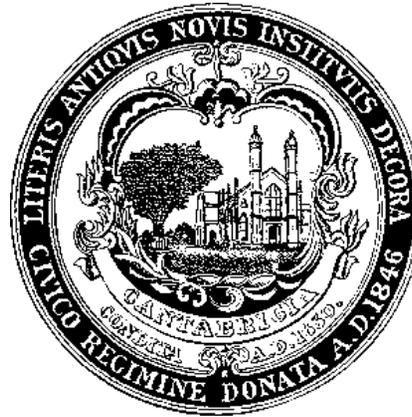
A Workshop for Energy Services Providers

Manage Energy Use and Help Your Clients Meet Building Energy Reporting Requirements in Boston and Cambridge

U.S.EPA ENERGY STAR Program
City of Cambridge
City of Boston

February 3, 2015
Cambridge City Hall Annex

CAMBRIDGE BUILDING ENERGY USE DISCLOSURE ORDINANCE



February 3, 2015



Background on Cambridge BEUDO

- Energy use and greenhouse gas emissions remain high.
- Energy use in commercial, institutional, and large residential buildings accounts for the bulk of energy consumption in Cambridge.
- Energy use in buildings is not transparent; there is not enough information available to the market about building energy performance to drive improvement
- Without comparative data, it is difficult for building owners and tenants to understand how efficient or inefficient their building is
- Annual tracking of energy use enables building owners and tenants to see the trend in their energy use and better understand it.
- The City lacks good energy use data for policy and planning purposes

BEUDO is a foundational policy

- 2014 Climate Protection Goals & Objectives
- Getting to Net Zero Task Force
- Kendall Square Ecodistrict
- Community Compact for a Sustainable Future
- Climate Change Preparedness & Resilience Plan
- Citywide Plan



City of Cambridge

Energy Use Disclosure Ordinance Basics

- ▶ Benchmarking, reporting, and disclosure only
- ▶ Report annually through Energy Star® PortfolioManager™
- ▶ Municipal buildings report first (10,000 s.f. and larger)
- ▶ Staged implementation phases: non-residential buildings 25,000-50,000 sf start reporting in 2016.
- ▶ First year of data is reported but not disclosed. Second year of data will be posted on City website.
- ▶ Review progress by end of 2018; are buildings improving?



BEUDO Applies to Properties

Buildings Subject to the Ordinance and Deadlines for Compliance

December 31st, 2014	May 1st, 2015	May 1st, 2016 (and every May 1st thereafter)
Municipal buildings 10,000 sq ft or greater	Municipal buildings 10,000 sq ft or greater	Municipal buildings 10,000 sq ft or greater
	Parcels with non-residential buildings singly or together contain <u>50,000</u> sq ft or greater	Parcels with non-residential buildings singly or together contain <u>25,000</u> sq ft or greater
	Parcels with residential buildings singly or together with 50 units or more	Parcels with residential buildings singly or together with 50 units or more



How to Complete Reporting

- ▶ Collect energy and water data for 2014
 - Utilize utility data services
- ▶ Set up your building in Portfolio Manager: area, uses, occupancy, etc.
- ▶ Upload energy and water data
- ▶ Include unique building ID number supplied by the City and any contextual information
- ▶ Submit report through Portfolio Manager to City



What's Next

- ▶ Community Development Department is working with stakeholders to develop approach to building energy data disclosure.
 - What kinds of contextual information is needed?
 - How to ensure users understand meaning of energy use intensity
 - If you want to participate, email jbolduc@cambridgema.gov
- ▶ Analyze 2014 data and issue report
- ▶ In 2018, the Community Development Department is required to assess progress on building energy performance to determine if additional actions needed
- ▶ Net Zero Task Force recommendations related to BEUDO data



Contact

For more information, contact:

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jbolduc@cambridgema.gov

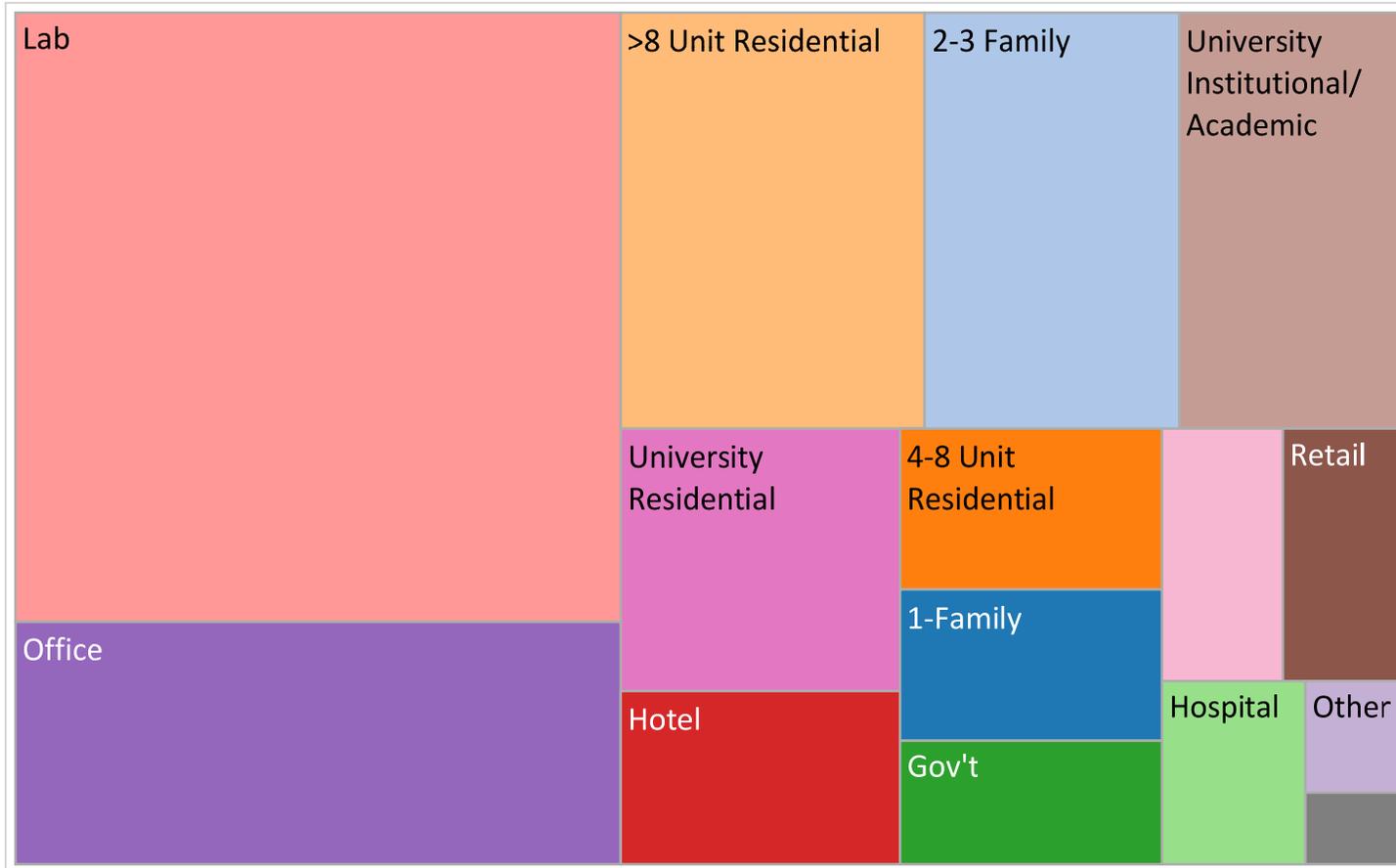
Bronwyn Cooke, Sustainability Planner

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bcooke@cambridgema.gov



Choosing Thresholds



- Past studies indicate energy use is highly concentrated and that larger buildings account for most energy use; laboratories are energy intensive
- Residential buildings with 50 or more units will be professionally managed



What will the City do with the Data and Information?

- ▶ Make the individual data and attribute information available to the marketplace for consideration by owners, tenants, prospective buyers, prospective tenants
- ▶ Annual analysis of data to understand energy use patterns and trends in Cambridge and identify opportunities to make the city more efficient
- ▶ Plan education and policy initiatives
- ▶ Track the City's progress toward reducing our contribution to climate change



Boston's Building Energy Reporting and Disclosure Ordinance

Nikhil Nadkarni

City of Boston

Environment Department



CITY OF BOSTON
Martin J. Walsh, Mayor



Today's Key Points

- Requires large buildings to annually report energy and water use
- Reports due May 15, 2015
- Today: go over the tools and resources available
 - Utility data services to provide whole-building data
 - EPA's Portfolio Manager tool to track, understand, and report energy use
- With data in hand, process takes ~2 hours



Background

- 2010: Climate Action Leadership Committee & Community Advisory Committee
 - Achieve Boston’s greenhouse gas reduction targets for 2020 and beyond
- Recommendation for an energy reporting and disclosure ordinance
- Objective of helping owners, residents, and efficiency programs better understand efficiency opportunities
- Included in Boston’s Climate Action Plan in 2011
- Enacted by City Council in May 2013; seventh city to implement
- Advisory Committee of building owners helped develop regulations



Key Elements of the Ordinance

- Annual reporting of energy and water use

2013	City of Boston buildings
2014	Nonresidential buildings over 50,000 square feet
2015	Residential buildings over 50,000 square feet or 50 units
2016	Nonresidential buildings over 35,000 square feet
2017	Residential buildings over 35,000 square feet or 35 units

- 2014-5: includes multiple buildings on one lot over 100k sf or 100 units
- Five year action or assessment requirement
- Metrics on energy use made publicly available in fall 2015



How To Complete Your Reporting

- Collect energy and water data for 2014
 - Utilize utility data services
- Set up your building in Portfolio Manager: area, uses, occupancy, etc.
- Upload energy and water data
- Include 10-digit tax parcel number and any contextual information
- Submit report through Portfolio Manager to City



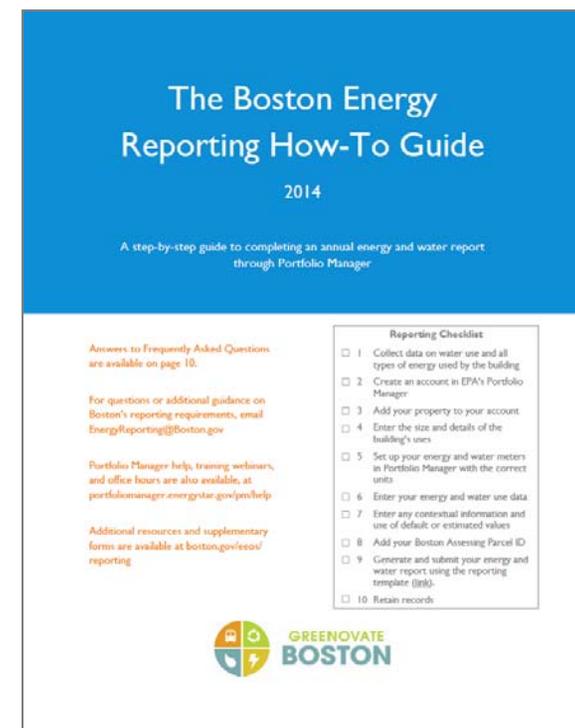
Important Points to Remember

- Any building over 50,000 sf (gross) or 50 units
 - Or multiple buildings totaling 100,000 sf or 100 units
- Whole building energy and water use
- Year 2014 data
- Buildings will have access to whole-building data from NSTAR, National Grid, and Veolia
 - If entering your own bills: cover the whole year – January 1 to December 31
- Get started early



Additional Resources

- Visit boston.gov/eeos/reporting
- List of parcels that must report
- Step-by-step guide to reporting
- Links to EPA resources and videos, and utility data services
- Calendar of future training, including ENERGY STAR online training



Last Year's Outcomes

- Over 880 buildings reported
- Includes offices, warehouses, retail stores, convents, private high schools, and hotels
- Completed by facilities managers, accountants, property managers, and third-party providers
- Feedback collected for process improvements



Contact Us

- Visit boston.gov/eeos/reporting
- Send questions to EnergyReporting@boston.gov
- Call the Environment Department at (617) 635-3850



GREENOVATE
BOSTON

Whole Building Energy Portal



Boston and Cambridge : Building Energy Disclosure Ordinances (BERDO/BEUDO)

- Owners and managers of large buildings required to annually report their energy and water use and greenhouse gas emissions
 - Annual reporting deadline of May 1 for Cambridge
 - Reporting deadline of May 15 for Boston
- In Boston, buildings required to conduct assessment or action every five years, with exemptions for highly efficient buildings and buildings making significant progress

Whole Building Energy Portal

- Web portal set up by NSTAR.
- Developed for building owners to comply with City Energy Reporting and Disclosure Ordinances.
 - <https://www.nu.com/ccberdoapps/EnergyDisclosureReporting/EnergyDisclosureLogin.aspx>



Exception Processing

- Buildings that have 3 or less tenants or have a tenant with the majority of energy use in the building (<50%).
- Building owners that do not have a common meter in their buildings.
- The utilities have provided a joint form for both of these exceptions.

Raw data file (.csv format)

Start Date	End Date	Usage	Cost	Estimated Value
1/1/2013	1/31/2013	5600		FALSE
2/1/2013	2/28/2013	5570		FALSE
3/1/2013	3/31/2013	4900		FALSE
4/1/2013	4/30/2013	4700		FALSE
5/1/2013	5/31/2013	4029		FALSE
6/1/2013	6/30/2013	3900		FALSE
7/1/2013	7/31/2013	4502		FALSE
8/1/2013	8/31/2013	5000		FALSE
9/1/2013	9/30/2013	4100		FALSE
10/1/2013	10/31/2013	3800		FALSE
11/1/2013	11/30/2013	3925		FALSE
12/1/2013	12/31/2013	4660		FALSE

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nationalgrid

HERE WITH YOU. HERE FOR YOU.

Boston BERDO Support – Requesting Usage from National Grid



February 2, 2015



BERDO Support Webpage

nationalgrid

HERE WITH YOU. HERE FOR YOU.

nationalgrid
HERE WITH YOU. HERE FOR YOU.

Sign in | Register | Massachusetts [Change region] | Report a gas emergency | Report a power outage

Type your question here

Massachusetts gas service | Bills and payments | Products and services for home | **Products and services for business** | Energy efficiency services | For business partners | Customer support

Boston Building Energy Reporting and Disclosure Ordinance Support

National Grid's Boston Building Energy Reporting and Disclosure Ordinance Support provides Boston building owners the building usage information they need to comply with BERDO.

Requesting gas usage data

Follow these simple steps to request your building's gas usage data

[Learn more](#) 
[Tenant Authorization Form](#) 
[Property Owner Verification Form](#) 

Important information

Helpful links and resources to help you comply with BERDO.

[NSTAR Energy Reporting and Disclosure Portal](#)
[EnergyStar Portfolio Manager Trainings](#)

Review the ordinance

Check the City of Boston's latest BERDO news and training opportunities.

[Learn more](#)

Other energy efficiency solutions

National Grid is committed to improving the energy performance of Massachusetts homes and businesses. View a list of the other energy efficiency solutions that we offer to our residential, commercial, and industrial customers.

[View energy efficiency solutions](#)

<http://www2.nationalgridus.com/psbusiness/berdosupport.jsp>

BERDO Usage Request Options

1. Email: BERDOSupport@nationalgrid.com
 - In subject line put BERDO Usage Request
 - In the email, please be sure to include:
 - Your Name & Building Owner Name
 - The Service Address and 10 digit National Grid Account Number of each account being requested
 - Number of Tenants
 - A signed copy of Tenant Authorization Form(if required)
 - For use when fewer than 4 tenants/accounts per property or a single tenant's usage exceeds 50% of Property annual energy usage
 - A signed copy of the Property Owner Verification Form
 - Contact Telephone Number
 - File Format requested (.xls or .csv)
 - Email address you would like the file sent
2. Call National Grid's Customer Assistance at: **1-800-732-3400**
 - Please let the Representative know you are calling regarding BERDO
 - Be prepared to provide the same information as listed above.

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or

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Using ENERGY STAR® Portfolio Manager®

A Workshop for Energy Services Providers

Manage Energy Use and Help Your Clients Meet Building Energy Reporting Requirements in Boston and Cambridge

Leslie Cook, EPA ENERGY STAR

Nils Klinkenberg, The Cadmus Group, in support of EPA

February 3, 2015

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Agenda

- Welcome from Cambridge and Boston
- Getting Whole-Building Data from Energy Utilities
- **ENERGY STAR Overview from the U.S. EPA**
- Interactive Training: ENERGY STAR Portfolio Manager & Reporting Data to the Cities
- Q&A/Wrap-Up



products
4.8 billion

commercial buildings
24,000

homes
1.5 million

industrial plants
130





ENERGY STAR

Commercial Buildings Program

- Offers a strategic approach to energy management
- Enables building owners, managers, and tenants to save money & protect the environment
- Provides organizations with measurable information on energy savings and greenhouse gas emissions reductions from commercial buildings
- Builds on strong ENERGY STAR brand recognition
- ENERGY STAR on a building = Superior Energy Performance
- Benchmarking is the first step



ENERGY STAR® PortfolioManager®

- **Management Tool** – Helps business and organizations by offering a platform to:
 - Assess whole building energy and water consumption
 - Track changes in energy, water, greenhouse gas emissions, and cost over time
 - Track green power purchase
 - Share/report data with others
 - Create custom reports
 - Apply for ENERGY STAR certification
- **Metrics Calculator** – Provides key performance metrics to integrate into a strategic management plan
 - Energy consumption (source, site, weather normalized)
 - Water consumption (indoor, outdoor)
 - Greenhouse gas emissions (indirect, direct, total, avoided)
 - ENERGY STAR 1-to-100 score (available for many building types)

→ **Accessible in a free, online secure platform:** www.energystar.gov/benchmark



State and local programs leverage Portfolio Manager.

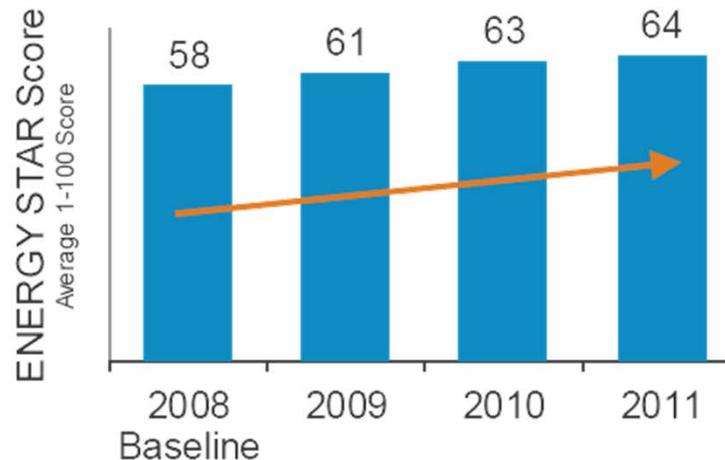
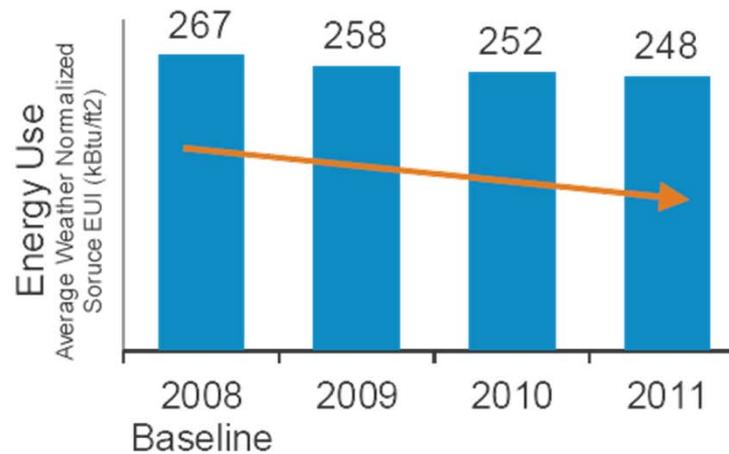




Value of Benchmarking

Energy Savings in Portfolio Manager

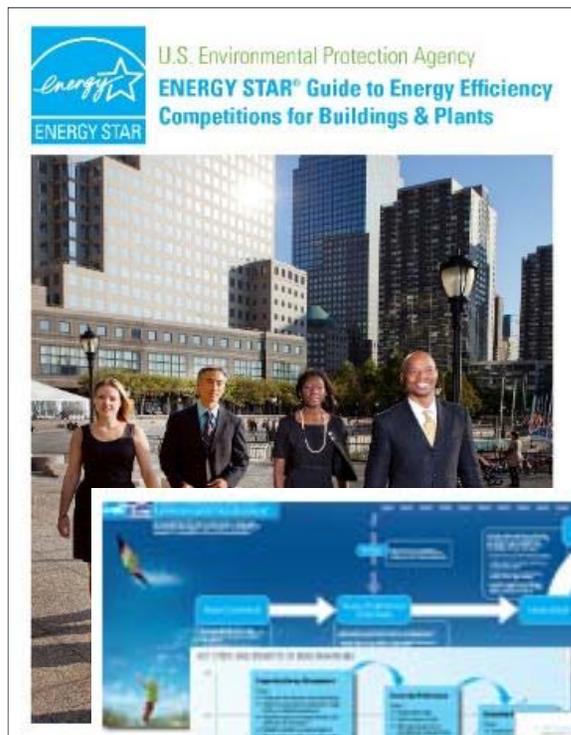
Consistent benchmarking in buildings results in energy savings and improved performance



Access EPA's Data Trends report series at www.energystar.gov/datatrends



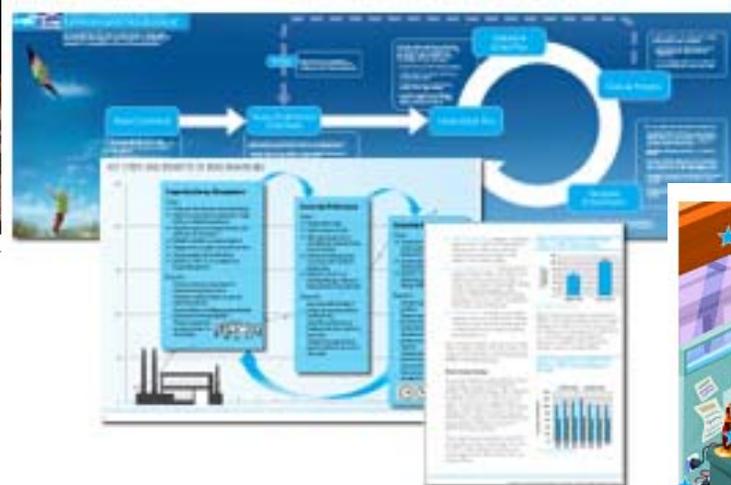
ENERGY STAR Resources that Make Benchmarking *Actionable*



- Guidelines for Energy Management
- Energy Efficiency Competition Planning Guide
- Success Stories: Landlords and Tenants
- Communications Strategy Planning Guide
- “Bring Your Green to Work” Engagement Kit
- Action Workbooks for Congregations and Small Businesses

....much more!

energystar.gov/buildings/tools-and-resources





ENERGY STAR Partnership

- ENERGY STAR partners can co-brand with ENERGY STAR, a brand recognized by 85 percent of Americans
- Partners also gain access to a rich variety of promotional materials
- ENERGY STAR partners commit to:
 - Measure/track/benchmark building energy use
 - Implement a plan to improve energy performance
 - Educate and communicate others about energy efficiency

www.energystar.gov/join



ENERGY STAR Partnership for Service & Product Providers (SPPs)

- EPA's free and voluntary partnership for energy service providers
 - Access technical support, guidance & training from EPA
 - Use ENERGY STAR logo and off-the-shelf marketing materials
- Differentiate yourself through EPA recognition
 - [Get added to EPA's directory of most active partners](#)
 - [Publish EPA service and product provider success stories](#)
 - [Include your activity in profiles of ENERGY STAR certified buildings](#)
 - [Earn ENERGY STAR Partner of the Year](#)
- Requirements to Join
 - Benchmark at least 10 customer buildings in the last 12 months using Portfolio Manager, and/or
 - Earn the ENERGY STAR certification for at least 1 customer building in the last 12 months





ENERGY STAR Recognition

- ENERGY STAR Certification for Buildings
- Designed to Earn the ENERGY STAR



- EPA's National Building Competition



- ENERGY STAR Partner of the Year



Energy Disclosure Laws Create Opportunities for Energy Service Providers

- **Promote Market Awareness of Programs**
 - Reach out to existing customers to encourage understanding, participation and compliance with legislation
 - Demonstrate your expertise to potential clients by being a source of useful information about program requirements
 - Support local government messaging, emphasizing that these initiatives create jobs and stimulate the local economy



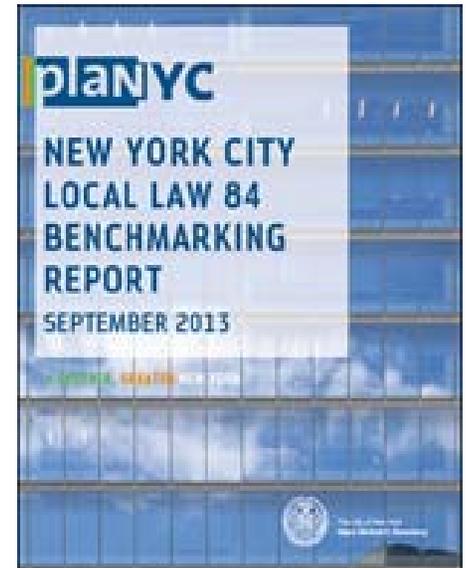
Energy Disclosure Laws Create Opportunities for Energy Service Providers

- **Assist Clients with Compliance**
 - Market and deliver benchmarking services
 - Sharpen your skills by attending ENERGY STAR benchmarking training
 - Encourage local professional associations to set up benchmarking support hotlines and training networks
- **Expand Business Opportunities through Enhanced Market Visibility**
 - Create a directory of local energy service providers available to assist building owners in your market
 - Encourage building owners to track and improve their energy performance – achieving long term goals of improved building competitiveness, reduced carbon footprint and job creation



Case Study: Energy Service Providers & Compliance with NYC's LL84

- New York City's Local Law 84 requires all private buildings over 50,000 sq. ft. to report their energy use via Portfolio Manager
 - 12,000+ buildings
 - 2 billion+ SF
- **More than 50% of the City's first year of required benchmarking was done by energy service providers.**
- Professional associations such as the Urban Green Council, City University of NY and the NY chapter of the Association of Energy Engineers provided crucial training and outreach.





Agenda

- Welcome from Boston and Cambridge
- Getting Whole-Building Data from Energy Utilities
- ENERGY STAR Overview from the U.S. EPA
- **Interactive Training: ENERGY STAR Portfolio Manager & Reporting Data to the Cities**
- Q&A/Wrap-Up



To Get Started Benchmarking in Portfolio Manager

Required data

- Property Information
 - Primary Function (*Office, Retail, Multifamily Residential*)
 - Name, street address, ZIP/postal code
- Details for each type of property use (*Office, Retail,...*)
 - Gross floor area
 - Use details (*weekly operating hours, number of computers, number of workers on the main shift, etc.*)
- Energy (& water) consumption data
 - Property-specific information
 - All purchased and on-site-generated energy, for all fuel types (*electricity, natural gas, fuel oil #2, ...*)



Live Demonstration

See Appendix 1 for screenshots & walkthrough



Troubleshooting



Address Data Quality Alerts

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



Meter Data Alerts



Welcome

[Account Settings](#) |
 [Contacts](#) |
 [Help](#) |
 [Sign Out](#)
 Language: [English](#) | [Français](#)

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

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.

Tell us which meter you would like to enter or manage bill information for:

Electricity has a gap of 35 days between the dates of 11/30/2005 and 01/05/2006. Please close the gap.
 Electricity has a gap of 29 days between the dates of 03/06/2006 and 04/05/2006. Please close the gap.
 Electricity has an overlap where 01/01/2009 precedes 01/02/2009. Please remove the overlap.
 Electricity has an overlap where 03/07/2011 precedes 04/01/2011. Please remove the overlap.
 Electricity has an overlap where 04/01/2011 precedes 04/04/2011. Please remove the overlap.

Electricity

▼

Select Meter

Don't see the meter you are looking for? [Add another meter](#)

<input type="checkbox"/>	Start Date	End Date	Usage	Cost	Estimation	Green Power?
<input type="checkbox"/>	9/1/2005	9/30/2005	427920 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	10/1/2005	10/31/2005	369840 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	11/1/2005	11/30/2005	384960 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
Electricity has a gap of 35 days between the dates of 11/30/2005 and 01/05/2006. Please close the gap.						
<input type="checkbox"/>	1/5/2006	2/3/2006	354960 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2/4/2006	3/6/2006	357360 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
Electricity has a gap of 29 days between the dates of 03/06/2006 and 04/05/2006. Please close the gap.						
<input type="checkbox"/>	4/5/2006	5/3/2006	366720 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>



Meter Alerts

- Alert will appear when gaps or overlapping dates are detected in meter entries. Users now have two options:
 - Fix errors that have been identified
 - Accept and continue. Gaps/overlaps in historic data will not affect current benchmarking period

Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost (\$)	Estimation	Green Power
1/1/2013	2/1/2013	42000		<input type="checkbox"/>	<input type="checkbox"/>
2/1/2013	2/28/2013	42000		<input type="checkbox"/>	<input type="checkbox"/>
3/1/2013	3/31/2013	42000		<input type="checkbox"/>	<input type="checkbox"/>
4/1/2013	4/30/2013	42000		<input type="checkbox"/>	<input type="checkbox"/>
5/1/2013					<input type="checkbox"/>
6/1/2013					<input type="checkbox"/>
7/1/2013					<input type="checkbox"/>
8/1/2013					<input type="checkbox"/>
9/1/2013	9/30/2013	42000		<input type="checkbox"/>	<input type="checkbox"/>

The **Date Meter became Active** that you entered for D2654 1/1/2011 creates a gap of missing bills for this meter. There is a gap between your **Date Meter became Active** and the earliest bill you entered. If you continue, your metrics may not be able to be calculated until this missing information is entered. Are you sure you want to continue?



Gross Floor Area Alert

This Property's Overall Use

[View as Diagram](#)

Name	Primary Function	Gross Floor Area	Action
▶ Parking Use	Parking		I want to...
▶ Vacant Space	Office	10000	I want to...
▶ Building Use	Office	100000	I want to...

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

Gross Floor Area Comparison

! The total of the [Gross Floor Area](#) for your uses does not equal the Gross Floor Area for your property. [Learn more.](#)



i Keeping Your Property Information up to date

If your property has more than one building, it is important that you keep your use details updated at both the property and building levels so that your ENERGY STAR score and other metrics are accurate. [Learn more about keeping use details up to date.](#)

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

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

Need to edit main “Building Use” to equal 90,000 sq. ft, to keep total floor area consistent



Data Quality Checker

- Added ability to detect errors in meter data or property information
 - Automated alerts for common data issues
 - Run for a specific 12-month period
 - Save time during application process

Demonstration Office

444 Efficiency Blvd, West Palm Beach, FL 33401 | [Map It](#)
Portfolio Manager Property ID: 3493688 | Primarily: Office
Year Built: 1990

 Not eligible to apply for
ENERGY STAR
Certification

ENERGY STAR Score (1-100)

Current Score: 100

Baseline Score: [N/A](#)

Summary Details Meters Goals Design

Property Profile

You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about your property, including a photo.

[+ Create Profile](#)

Source EUI Trend (kBtu/ft²)



Year	Source EUI (kBtu/ft ²)
2012	175

Notifications

You have no new notifications.

Data Quality for this Property

The metrics that Portfolio Manager calculates depend on your [use details](#) and your energy bills. The data quality checker inspects the information you have entered to identify possible errors. If a property is shared with you as "Read Only," you will not be able to run the Data Quality Checker.

Date checker last run: 01/24/2014

On data for the year ending: 12/31/2012

Result: ✖ 1 Alerts Found [View Alerts](#)

[Check Data Quality](#)



Troubleshooting Responses to a City Data Request



https://portfoliomanager.energystar.gov/pm/reports

MyPortfolio | Sharing | Planning | **Reporting** | Recognition

Charts & Graphs

Weather Normalized Site EUI
How much energy would be reported on my bills, under average weather conditions?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Score Card](#)

Templates & Reports (75)

[Create a New Template](#)

Your new response preview(s) has been generated, however basic metrics could not be calculated for one or more properties in the request. [Read more](#)

A response to a data request was created. This new message alerts the user that metrics could not be computed for one or more properties. Then they click “Read more” ...



MyPortfolio

Sharing

Planning

Reporting

Recognition

Data Request Response Has Missing Metrics (N/A's)

⚠ Your data response contains 32 properties where **Site EUI** could not be calculated.

When **Site EUI** cannot be calculated, typically it means there is not 12 full months of complete meter data or there is a problem with your property's Gross Floor Area. These metrics are the basis for other more complicated metrics (such as the **ENERGY STAR Score**), so other metrics may also be unavailable as a result.

Properties With Missing Metrics (N/A's) (32) (response preview generated 01/21/2015 03:33 PM EST)

4230803	Atlanta Design Demo	12/31/2013	This property does not have any Property Uses (ex: Office, Restaurant). Please add at least one Property Use with complete Use Details (ex: Number of Workers, Number of Computers).
3954907	Cambridge Design	12/31/2012	This property does not have any Property Uses (ex: Office, Restaurant). Please add at least one Property Use with complete Use Details (ex: Number of Workers, Number of Computers).
3954907	Cambridge Design	12/31/2013	This property does not have any Property Uses (ex: Office, Restaurant). Please add at least one Property Use with complete Use Details (ex: Number of Workers, Number of Computers).
1423620	Courthouse test	12/31/2012	The meter 123245 does not have 12 full calendar months of bills for the selected year. Please enter bills for the full 12 months.
1423620	Courthouse test	12/31/2013	The meter 123245 does not have 12 full calendar months of bills for the selected year. Please enter bills for the full 12 months.

After clicking “Read more” the user sees a detailed list where “N/A” is present in the Site EUI field (N/A in the Site EUI field indicates data issues). The links in the list take the user to the specific screen where the data problem can be fixed.





What Would You Like To Do?



I Want to Review/Edit these Properties

You can review individual properties/meters by using the links in the table above or [download it to Excel](#) in order to begin troubleshooting these issues.



I Thought I Fixed These Problems- I Want to [Generate an Updated Response](#)

If you have made changes to your data since your response was generated (01/21/2015 03:34 PM EST), you will need to re-generate the report in order for these changes to be reflected.

[Generate Updated Response](#)



I Want to Submit Anyway

If you have verified that any issues listed in the table above are not the result of a mistake, you can continue submitting your response. Note that an incomplete request could be considered invalid or non-compliant by the requestor so it is strongly encouraged that you fix any issue before proceeding.

[Send Response](#)

(You will confirm your response in the next screen.)

The user has three options when N/As have been found:

- 1. Review and edit properties (using hotlinks or Excel)**
- 2. Generate an updated response (they fixed the underlying data problems but didn't complete this step in the process)**
- 3. Submit the response with N/As**



Getting Help with Portfolio Manager



Where to go for Help

- Portfolio Manager Help link (in upper-right on every page):

[Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

Portfolio Manager Help



[Learn More about Portfolio Manager](#)

Get fact sheets, quick reference guides and other information about how the tool works.



[Search the Knowledge Base](#)

Browse or search our Frequently Asked Questions.



[Check the Glossary](#)

Look up terms used throughout Portfolio Manager.



[Take or View a Training](#)

Sign up for a session or view a recording on a wide variety of topics.



[Ask a Question](#)

Send a question or comment to our staff.



[Web Service Documentation](#)

If you exchange data via web services, check out the documentation or get email updates.



Where to go for Help

- ENERGY STAR Buildings & Plants – Help Portal:
www.energystar.gov/buildingshelp
- Portfolio Manager resources available at:
portfoliomanager.energystar.gov
 - Step-by-step documents (PDF)
 - Recorded webinars, short training videos
 - Regular live webinars and online “Office Hours” sessions
www.energystar.gov/buildings/training



Where to go for Help

- Do you train others on how to use Portfolio Manager? Join the **ENERGY STAR Trainer Community**

GET MORE OUT OF ENERGY STAR TRAINING

Get [monthly emails](#) listing upcoming training sessions.

Want to train others? Join the [ENERGY STAR Trainer Community](#) to access exclusive resources.

Sign up at

<http://www.energystar.gov/buildings/training>



Where to go for Help

Ordinance websites

Boston:

<http://www.cityofboston.gov/eeos/reporting/>

Cambridge:

<http://www.cambridgema.gov/beudo>



APPENDIX 1

Live Demonstration

<http://www.energystar.gov/benchmark/>

The screenshot shows the Energy Star Portfolio Manager website. The top navigation bar includes the Energy Star logo, a search bar, and social media icons for Facebook, Twitter, YouTube, and a blog. Below the navigation bar, there are several menu items: "ENERGY EFFICIENT products", "ENERGY SAVINGS at home", "ENERGY EFFICIENT new homes", and "ENERGY STRATEGIES FOR buildings & plants". There are also links for "ABOUT ENERGY STAR" and "PARTNER RESOURCES".

The main content area is titled "Use Portfolio Manager" and includes a sub-header "IN THIS SECTION" with a list of links: "Learn the benefits", "Get started", "Use Portfolio Manager" (expanded to show sub-links like "The new ENERGY STAR Portfolio Manager", "How Portfolio Manager helps you save", "The benchmarking starter kit", "Identify your property type", "Enter data into Portfolio Manager", "The data quality checker", "How Portfolio Manager calculates metrics", "Interpret your results", "Verify and document your savings", "Share and request data"), and "Save energy".

The "Use Portfolio Manager" section contains the following text:
Use Portfolio Manager
You've heard it before: you can't manage what you don't measure. That's why EPA created ENERGY STAR Portfolio Manager®, an online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions. Use it to benchmark the performance of one building or a whole portfolio of buildings, all in a secure online environment.

Not sure if Portfolio Manager is for you? It is!
You can use Portfolio Manager to manage the energy and water use of any building. Seriously. Any building. K-12 school? Check. Office building? Check. Stadium? Check. We could keep going.

All you need are your energy bills and some basic information about your building to get started.

Join the rest of the industry.
When you add your buildings, you'll be joining 40 percent of U.S. commercial building space that's already benchmarked in Portfolio Manager – making it the industry-leading benchmarking tool. You'll also be joining 35 percent of the Fortune 500®, half of the largest U.S. healthcare organizations, major league sports teams, colleges and universities, and entire cities.

Login to your account

Username:

[forgot username?](#)

Password:

[forgot password?](#)

[New user? Register](#)

SIGN UP

Current Portfolio Manager Users

[Forgot password?](#)





How To

- Create an account
- Navigate Portfolio Manager
- Add a property and enter details about it
- Enter energy and water consumption data
- Enter the Energy Reporting ID number for Boston or Cambridge
- Respond to data requests
- Set Goals and Evaluate Results



Create an Account

The screenshot shows the Energy Star website interface. At the top, there is a navigation bar with the Energy Star logo and several menu items: "ENERGY EFFICIENT products", "ENERGY SAVINGS at home", "ENERGY EFFICIENT new homes", and "ENERGY STRATEGIES FOR buildings & plants". To the right of these items are social media icons for search, Facebook, Twitter, YouTube, and a blog icon. Below the navigation bar, there is a search bar and a "portfolio manager login" link. The main content area features a large banner with the text "Environmental protection and financial value. Achieve them both with help from ENERGY STAR." and a background image of a city skyline. A login form is overlaid on the right side of the page, highlighted with a red circle. The form is titled "Login to your account" and contains fields for "Username:" and "Password:". Below the password field are links for "forgot username?" and "forgot password?". At the bottom of the form are a "Login" button and a link for "New user? Register".



How To

- Create an account
- **Navigate Portfolio Manager**
- Add a property and enter details about it
- Enter energy and water consumption data
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Navigating Portfolio Manager

Five portfolio level tabs



Five property tabs



Intuitive navigation – multiple ways to get to the same place



Navigating Portfolio Manager

Portfolio level



Welcome

[Account Settings](#) |
 [Contacts](#) |
 [Help](#) |
 [Sign Out](#)
 Language: [English](#) | [Français](#)

MyPortfolio | [Sharing](#) | [Planning](#) | [Reporting](#) | [Recognition](#)

Properties (5)

Add a Property

Notifications (0)

You have no new notifications.

Source EUI Trend

My Properties (5) Add a Property

Filter by: View All Properties (5) Search Search

[Create Group](#) | [Manage Groups](#)

Name	Action
Federal Building	I want to... ▼
Higher Campus	I want to... ▼
Hill Store	I want to... ▼
Insurance Office	I want to... ▼
Sunnyside Elementary	I want to... ▼

Page 1 of 1 View 1 - 5 of 5

[Download Entire Portfolio](#)

Total GHG Emissions Trend

! If you're a pro, you may want to [upload and/or update multiple properties](#) at once using an Excel spreadsheet. This can be done to create new properties, add use details, create meters and add meter consumption data.





Navigating Portfolio Manager

The screenshot shows the Energy Star Portfolio Manager interface for a property named "Insurance Office". The interface includes a navigation menu with tabs for "MyPortfolio", "Sharing", "Planning", "Reporting", and "Recognition". The "MyPortfolio" tab is active, displaying property details: "5201 Blue Lagoon Dr, Arlington, VA 20221", "Map It EXISTING", "Portfolio Manager Property ID: 5000003", "Primarily: Office", and "Year Built: 1995 EXISTING". A "Finish your application for ENERGY STAR Certification" button is visible. The "ENERGY STAR Score" section shows a "Current Score: 94" and a "Baseline Score: 83". Below the property details are tabs for "Summary", "Details", "Meters", "Goals", and "Design". The "Summary" tab is selected, showing a "Source EUI Trend" line graph from 2002 to 2012. The graph shows a general downward trend in EUI over the period. To the right of the graph are sections for "Notifications" (stating "You have no new notifications.") and "Sharing this Property". The "Sharing this Property" section shows the property is shared with 1 contact (ABS) and includes a table for permissions. The table lists "Miller, Clara" with "Full Access" and an "Action" dropdown menu set to "I want to...". An "Edit Multiple Permissions" button is at the bottom of the sharing section.

Property level

Summary Details Meters Goals Design

Source EUI Trend

Name	Permissions	Action
Miller, Clara	Full Access	I want to...

Edit Multiple Permissions



How To

- Create an account
- Navigate Portfolio Manager
- **Add a property and enter details about it**
- Enter energy and water consumption data
- Enter the Energy Reporting ID number for Boston or Cambridge
- Respond to data requests
- Set Goals and Evaluate Results



Get Data In

- 3 ways to enter data for your property or portfolio:
 1. Enter data manually
 2. Upload data using spreadsheet templates
 3. Work with 3rd party providers that exchange data directly with Portfolio Manager via web services



Get Data In: 1. Manually with the help of Portfolio Manager prompts

The screenshot shows the Energy Star Portfolio Manager interface. At the top, there is a navigation bar with tabs for 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. Below this, there are three main sections: 'Properties (5)', 'Notifications (0)', and 'My Properties (5)'. The 'Properties (5)' section contains a red circle around the 'Add a Property' button. The 'Notifications (0)' section shows a message: 'You have no new notifications.' The 'My Properties (5)' section has a 'Filter by:' dropdown set to 'View All Properties' and a table with one row for 'Federal Building'. Below the 'Add a Property' button is a 'Source EUI Trend' chart showing a line graph with data points over time. The y-axis ranges from 500 to 1,000. The x-axis has 10 grid lines. The data points are approximately: (1, 500), (2, 480), (3, 490), (4, 450), (5, 400), (6, 850), (7, 400), (8, 400), (9, 400), (10, 400).



Get Data In: 2. Spreadsheet Upload

The screenshot shows the ENERGY STAR Portfolio Manager interface. On the left, there are two line graphs: 'Source EUI Trend' and 'Total GHG Emissions Trend'. The 'My Properties (5)' table lists the following properties:

Name	Action
Federal Building	I want to...
Hooper Campus	I want to...
Hill Stone	I want to...
Insurance Office	I want to...
Sunnyside Elementary	I want to...

A red circle highlights a link in the bottom left corner of the screenshot that reads: "If you're a pro, you may want to [upload and/or update multiple properties](#) once you have a spreadsheet. This can be done to [create new properties](#), [add use details](#), [create meter consumption data](#)."

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet than [entering each property manually](#) or adding bills manually. There are specific steps to use these spreadsheets. Learn more below.

What do you want to upload first?

- Add new properties to my account** - To get started fill in [this spreadsheet](#) and upload it in the box below.
- Edit/Upload my existing properties** - To do this you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in your template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are finished entering information in your upload template (either standard or custom), upload it here. Processing time could be affected by file size.

Type of Upload:

Upload Template: No file chosen

Select "Browse" to locate the file on your computer and then select "Upload."

! Depending on internet speeds, files larger than XX MG may not be able to be successfully uploaded to the server before the session times out. We advise files smaller than XX MG.

[Close](#)

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)



Get Data In: 3. Exchanging Data with Portfolio Manager

- Portfolio Manager XML “web services” API* allows service providers to develop software to transfer data into and out of Portfolio Manager automatically
 - Easy upload & efficient management of data for large portfolios
- **Over 150 organizations** have software that is actively exchanging data with Portfolio Manager via web services
- **Over 65 percent of properties benchmarked in Portfolio Manager** in 2013 were benchmarked via web services
- More information is available at:
<http://portfoliomanager.energystar.gov/webservices/home>

**Application Programming Interface*



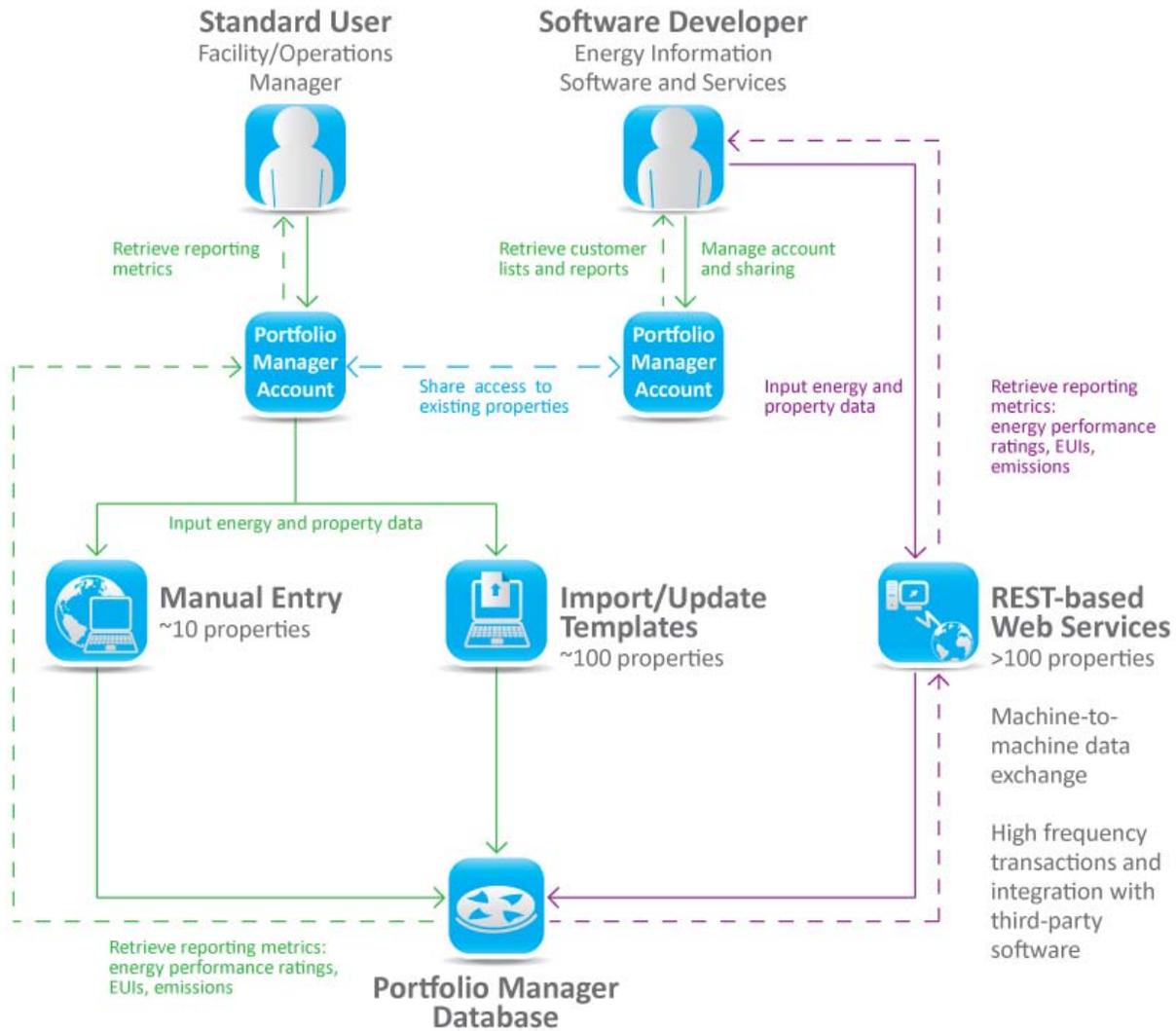
Get Data In: Using XML Web Services to Exchange Data

- Enables energy service companies and utilities to exchange data with Portfolio Manager (post and retrieve) to
 - Manage building and energy data for customers
 - Access the ENERGY STAR score and other performance metrics from Portfolio Manager
- Users taking advantage of web services must “connect” and “share” with their web service provider



How Web Services Work

Portfolio Manager Data Entry/Reporting Options





Add a Property (Manually)

The screenshot shows the Energy Star Portfolio Manager interface. At the top, there is a navigation bar with tabs for 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. Below this, the main content area is divided into several sections. On the left, there is a 'Properties (5)' section with a red circle around the 'Add a Property' button. Below this is a 'Source EUI Trend' chart showing a line graph with data points. On the right, there is a 'Notifications (0)' section with the text 'You have no new notifications.' and a 'My Properties (5)' section with a filter dropdown set to 'View All Properties' and a table listing properties, with 'Federal Building' visible.



Add a Property



Welcome [User Name] : [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

Language: [English](#) | [Franca](#)

Set up a Property: Let's Get Started!

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



Your Property's Primary Function

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

Select a function ▼

[Learn more about functions](#)



Your Property's Buildings

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

How many?



Your Property's Construction Status

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

Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.

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

Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#). You can use our handy [data collection worksheet](#), in advance, to prepare the information that you will need to complete this process.

Tip

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

Get Started!

Cancel

78



Add a Property

ENERGY STAR® **PortfolioManager™**

Welcome : [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Franca](#)

Set up a Property: Let's Get Started!

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

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

Select a function

Select a function

Banking/Financial Services
Bank Branch
Financial Office

Education
Adult Education
College/University
K-12 School
Pre-school/Daycare
Vocational School
Other

Entertainment/Public Assembly
Convention Center
Movie Theater
Museum
Performing Arts
Recreation
Social/Meeting Hall
Stadium
Other

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

Get Started! [Cancel](#)

Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#). You can use our handy [data collection worksheet](#), in advance, to prepare the information that you will need to complete this process.

Tip

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



Basic Property Information

 **ENERGY STAR®**
PortfolioManager™

Welcome : [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Français](#)

Set Up a Property: Basic Property Information

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

About Your Property

Name: *

Country: * --- Select --- ▼

Street Address: *

City/Municipality: *

State/Province: * --- Select --- ▼

Postal Code: *

Year Built: *

Gross Floor Area: * Sq. Ft. ▼ [Temporary Value](#)

Gross Floor Area is the total floor area, expressed in square feet or square meters, measured from the principal exterior surfaces of the building(s) and not including parking area(s).

[Occupancy](#): * Select ▼ %

 **Tip**
The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.
.....



Check the Statements that Apply

Do any of these apply?

My property's energy consumption includes [parking](#) areas

Tip
Answering these simple questions will help us guide you in entering your property correctly.

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

Follow Us [t](#) [f](#) [You Tube](#) [in](#) [Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

Do any of these apply?

My property's energy consumption includes [parking](#) areas

My property has a [Data Center](#) that requires a constant power load of 75 kW or more

My property has one or more retail stores

My property has one or more restaurants/cafeterias

Tip
Answering these simple questions will help us guide you in entering your property correctly.

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

Follow Us [t](#) [f](#) [You Tube](#) [in](#) [Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)



Enter Values for Property Use Details

Add Another Type of Use ▼ Add

▼ Building Use / [Edit Name](#)

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the on-site preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

Characteristic	Value	Current As Of	Temporary Value
Gross Floor Area	<input type="text" value="12000"/> Sq. Ft. ▼	<input type="text" value="01/01/1992"/>	<input type="checkbox"/>

▼ Building Use / [Edit Name](#)

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the on-site preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

Characteristic	Value	Current As Of	Temporary Value
Gross Floor Area	<input type="text" value="12000"/> Sq. Ft. ▼	<input type="text" value="01/01/1992"/> ...	<input type="checkbox"/>
Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="01/01/1992"/> ...	<input type="checkbox"/>
Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="01/01/1992"/> ...	<input type="checkbox"/>

Back
Add Property Cancel



MyPortfolio: Property Summary Tab

ENERGY STAR® PortfolioManager™

Welcome : [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Français](#)

MyPortfolio | [Sharing](#) | [Planning](#) | [Reporting](#) | [Recognition](#)

Congratulations! You have successfully created your property. Next, would you like to:
Continue by [adding energy use information](#), so that I can see my energy performance metrics.

Supermarket A-1

1234 Main St., Arlington, VA 22201 | [Map It](#) EXISTING
Portfolio Manager Property ID: 5000066 | Primarily: [Supermarket/Grocery Store](#)
Year Built: 1992 EXISTING

Weather- Normalized Source EUI

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

Summary | [Details](#) | [Meters](#) | [Goals](#) | [Design](#)

Source EUI Trend

Notifications

You have no new notifications.

Sharing this Property

Shared with: 0 [Contacts](#) ([ABS](#)) [Share](#)

More About Sharing

You haven't [shared your property](#) yet. Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. operational characteristics or meter data).





Add and Set up a Property: More than One Building



ENERGY STAR PortfolioManager™
Welcome | Account Settings | Contacts | Help | Sign Out
Language: English | Français

Set up a Property: Let's Get Started!

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

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

Select a function

[Learn more about functions](#)

Your Property's Buildings
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

How many?

Your Property's Construction Status
Is your property already built or are you entering this property as a construction project that has not yet been completed?

Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
 Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.

Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#). You can use our handy [data collection worksheet](#), in advance, to prepare the information that you will need to complete this process.

Tip

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

Get Started! [Cancel](#)

Use to enter a campus or other collection of non-submetered buildings





Multi-Building Properties (e.g. a Campus)

The screenshot shows the ENERGY STAR Portfolio Manager interface for a multi-building property named "Campus X". The page includes a navigation menu with "MyPortfolio", "Sharing", "Planning", "Reporting", and "Recognition". A green notification bar states "Campus X has been updated." The property details for "Campus X" are: 1234 Campus St., Arlington, VA 22201 | [Map It](#) EXISTING; Portfolio Manager Property ID: 5000068 | Primarily: [College/University](#); Year Built: 1975 EXISTING. A "Weather-Normalized Source EUI" box shows "Current EUI: N/A" and "Baseline EUI: N/A". Below the details are tabs for "Summary", "Details", "Meters", "Goals", and "Design". The "Summary" tab is active, showing a "Source EUI Trend" chart with a blank grid for the years 2002, 2004, 2006, 2008, and 2010. A "Total GHG Emissions Trend" chart is also visible. A large text box is overlaid on the chart area, providing instructions on how to track individual buildings.

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](#) EXIT ↗

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](#) EXIT ↗



How To

- Create an account
- Navigate Portfolio Manager
- Add a property and enter details about it
- Enter energy and water consumption data
- Enter the Energy Reporting ID number for Boston or Cambridge
- Respond to data requests
- Set Goals and Evaluate Results



MyPortfolio: Property Meters Tab

Supermarket A-1

1234 Main St., Arlington, VA 22201 | [Map It](#) EXISTING
Portfolio Manager Property ID: 5000066 | Primarily: [Supermarket/Grocery Store](#)
Year Built: 1992 EXISTING

Weather- Normalized Source EUI
Current EUI: N/A
Baseline EUI: N/A

Summary Details **Meters** Goals Design

Energy & Water Consumption

[Manage/Enter My Bills](#)

Meters for Total Consumption

[View/Edit](#)

Utility & Weather

Electric Distribution Utility (EDU):
Virginia Electric & Power Co [Dominion Resources Inc]
Regional Power Grid:
Virginia/Carolina
Weather Station:
WASHINGTON/NATIONAL (724050)

Your [electric distribution utility \(EDU\)](#) and [weather station](#) selections affect the calculation of your energy metrics.

Energy Meters (0)

[View as a Diagram](#) [Add Another Meter](#)

In order to receive a score for your property, you must provide an energy meter. You have not entered any meters yet. After [entering the meter](#), you will need to [associate](#) it in order to receive a score.

Water Meters (0)

[View as a Diagram](#) [Add Another Meter](#)

In order to receive a score for your property, you must provide water meters. You have not entered any meters yet. After [entering the meter](#), you will need to [associate](#) it in order to receive a score.



Add Meters

Supermarket A-1

1234 Main St., Arlington, VA 22201 | [Map It](#) EXISTING
Portfolio Manager Property ID: 5000066 | Primarily: [Supermarket/Grocery Store](#)
Year Built: 1992 EXISTING

Weather- Normalized Source EUI
Current EUI: N/A
Baseline EUI: N/A

Summary Details **Meters** Goals Design

Energy & Water Consumption

[Manage/Enter My Bills](#)

Meters for Total Consumption

[View/Edit](#)

Utility & Weather

Electric Distribution Utility (EDU):
Virginia Electric & Power Co [Dominion Resources Inc]
Regional Power Grid:
Virginia/Carolina
Weather Station:
WASHINGTON/NATIONAL (724050)

Your [electric distribution utility \(EDU\)](#) and [weather station](#) selections affect the calculation of your energy metrics.

Energy Meters (0)

[View as a Diagram](#)

[Add Another Meter](#)

In order to receive a score for your property, you must provide an energy meter. You have not entered any meters yet. After [entering the meter](#), you will need to [associate](#) it in order to receive a score.

Water Meters (0)

[View as a Diagram](#)

[Add Another Meter](#)

In order to receive a score for your property, you must provide water meters. You have not entered any meters yet. After [entering the meter](#), you will need to [associate](#) it in order to receive a score.





Answer Questions about Energy Use in Your Property



Welcome | Account Settings | Contacts | Help | Sign Out

Language: English | Français

Get Started Setting Up Meters for Supermarket A-1

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.



Sources of Your Property's Energy

How does your property acquire energy? Please select all that apply.

- Electric
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water

Don't see your energy sources?
+ [See more energy sources?](#)



Your Property's Water Usage

How does your property use water? Please select all that apply.

- [Municipally Supplied Potable Water](#)
- [Municipally Supplied Reclaimed Water](#)
- [Alternative Water Generated On-Site](#)
- [Other](#)

Tracking Energy

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

Entering Your Meters in Bulk

For advanced users, you may prefer to use the upload tool to [set up all of your meters with one click](#).

Automate Your Meter Entries

If you have a lot of meters, you may want to consider hiring an organization that exchanges data to automatically update your energy consumption. [Learn more](#)

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

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Enter Additional Information

Sources of Your Property's Energy

How does your property acquire energy? Please select all that apply.

- Electric**
 - purchased from the grid
How Many Meters?
 - generated on site with my own solar panels
 - generated on site with my own wind turbines
- Natural Gas**
How Many Meters?
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water

Don't see your energy sources?
+ [See more energy sources?](#)

Your Property's Water Usage

How does your property use water? Please select all that apply.

- Municipally Supplied Potable Water**
 - Indoor
How Many Meters?
 - Outdoor
 - All
- Municipally Supplied Reclaimed Water**
- Alternative Water Generated On-Site**
- Other**

Tracking Energy

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

Entering Your Meters in Bulk

For advanced users, you may prefer to use the upload tool to [set up all of your meters with one click](#)

Automate Your Meter Entries

If you have a lot of meters, you may want to consider hiring an organization that exchanges data to automatically update your energy consumption. [Learn more](#)

90



About your Meters



[Welcome](#) | [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
 Language: [English](#) | [Français](#)

About Your Meters for Supermarket A-1

Enter the information below about your new meters. The meter's units and first bill date are required. You can also change the meter's name.

2 Energy Meters for Supermarket A-1 (click anything in the table to edit)

<input type="checkbox"/>	Meter Name	Type	Units	First Bill Date	In Use?	End Date	Enter as Delivery?
<input type="checkbox"/>	Natural Gas	Natural Gas			<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid			<input checked="" type="checkbox"/>		<input type="checkbox"/>

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

1 Water Meter for Supermarket A-1 (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Units	First Bill Date	In Use?	End Date
<input type="checkbox"/>	Potable Indoor Meter	Potable Indoor			<input checked="" type="checkbox"/>	

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

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

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Click in Table to Edit Meter Information


Welcome
Account Settings | Contacts | Help | Sign Out

Language: English | Français

About Your Meters for Supermarket A-1

Enter the information below about your new meters. The meter's units and first bill date are required. You can also change the meter's name.

2 Energy Meters for Supermarket A-1 (click anything in the table to edit)

<input type="checkbox"/>	Meter Name	Type	Units	First Bill Date	In Use?	End Date	Enter as Delivery?
<input type="checkbox"/>	Natural Gas	Natural Gas			<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	<input type="text" value="Electric Grid Meter"/>	<input type="text" value="Electric - Grid"/>	<input type="text" value="kWh (thousand)"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>

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

1 Water Meter for Supermarket A-1 (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Units	First Bill Date	In Use?	End Date
<input type="checkbox"/>	Potable Indoor Meter	Potable Indoor			<input checked="" type="checkbox"/>	

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

Follow Us



[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)



Add Energy Consumption Information

Expand meter by clicking arrow

The screenshot shows the Energy Star Portfolio Manager interface for 'Supermarket A-1'. The page title is 'Your Meter Entries for Supermarket A-1'. Below the title, there is a message: 'Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score! [Learn more about entering energy consumption information.](#)'

Under the heading '2 Energy Meter(s) for Supermarket A-1', there are two entries:

- Natural Gas** [Edit](#) ✖ Delete Meter
- Electric Grid Meter** [Edit](#) ✖ Delete Meter

The 'Natural Gas' entry is circled in red, and a red arrow points to the right-pointing triangle icon next to it. Below these entries is a section for '1 Water Meter(s) for Supermarket A-1' with one entry:

- Potable Indoor Meter** [Edit](#)

At the bottom of the meter list, there are two buttons: 'Back' and 'Finish Meter Set Up' (with a 'Cancel' link next to it).

At the very bottom of the page, there is a 'Follow Us' section with social media icons for Twitter, Facebook, YouTube, and LinkedIn, and a footer with links for 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.



Add Meter Entries and Fill in Data

The screenshot shows the Energy Star Portfolio Manager interface for 'Supermarket A-1'. It displays two energy meter categories: 'Natural Gas' and 'Electric Grid Meter'. The 'Natural Gas' section includes a table with columns for Start Date, End Date, Usage, Cost, and Estimation. Below the table, there are options to 'Delete Selected Entries' and 'Add Another Entry'. A red arrow points to the 'Add Another Entry' link. To the right, there is a message about uploading an Excel spreadsheet with a 'Choose File' button and an 'Upload' button. Another red arrow points to the 'Upload' button. At the bottom, there is a 'Finish Meter Set Up' button circled in red, with a 'Cancel' button next to it.

Click the “+” to add entries

Upload a spreadsheet, using template





Meters to Add to Total Consumption

Meters to add to Total Consumption for Federal Building

Tell us which meters to include when calculating the total usage for this property so that we can provide you with the most accurate metrics possible.

Property Totals

Energy Meters
Check the boxes for the meters that should be included in the energy metrics:

<input type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	Electricity
<input checked="" type="checkbox"/>	Natural Gas
<input checked="" type="checkbox"/>	Fuel Oil (No. 2)

Total of 3 energy meter(s). Tell us what these meter(s) measure:

These meter(s) account for the total energy consumption for this property.
 These meter(s) do not account for the total energy consumption for this property.

Water Meters
Check the boxes for the meters that should be included in the water metrics:

<input type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	Total Water

Total of 1 water meter(s). Tell us what these meter(s) measure:

These meter(s) account for the total water consumption for this property.
 These meter(s) do not account for the total water consumption for this property.

Apply Selections [Cancel](#)



Property Meters Tab: Meters Added and Displayed

Notification



Congratulations! You have successfully added meters to your property.

Supermarket A-1

1234 Main St., Arlington, VA 22201 | [Map It](#) EXISTING
Portfolio Manager Property ID: 5000071 | Primarily: [Supermarket/Grocery Store](#)
Year Built: 1992 EXISTING

Weather-Normalized Source EUI

Current EUI: N/A

Baseline EUI: N/A

Summary Details **Meters** Goals Design

Energy & Water Consumption

Manage/Enter My Bills

Meters for Total Consumption

View/Edit

Utility & Weather

Electric Distribution Utility (EDU):
Virginia Electric & Power Co [Dominion Resources Inc]

Regional Power Grid:

Energy Meters (2)

[View as a Diagram](#)

Add Another Meter

Name	Energy Type	Most Recent Bill Date	Action
Natural Gas	Natural Gas	04/30/2012	I want to...
Electric Grid Meter	Electric - Grid	03/31/2012	I want to...

Water Meters (1)

[View as a Diagram](#)

Add Another Meter

Name	Water Meter	Most Recent Bill Date	Action
Potable Indoor			

Click for details





View Meter Data and Manage Bills for your Property

Welcome [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
 Language: [English](#) | [Français](#)

Manage Bills (Meter Entries) for [Hill Store](#)

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.

Tell us which meter you would like to enter or manage bill information for:

Electricity

▼

Select Meter

!
Don't see the meter you are looking for? [Add another meter](#)

<input type="checkbox"/>	Start Date	End Date	Usage	Cost	Estimation	Green Power?
<input type="checkbox"/>	8/23/2004	9/22/2004	50400 kWh (thousand Watt-hours)	4010.43	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9/23/2004	10/22/2004	36320 kWh (thousand Watt-hours)	2271.72	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	10/23/2004	11/22/2004	81920 kWh (thousand Watt-hours)	3017.24	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	11/23/2004	12/22/2004	114720 kWh (thousand Watt-hours)	3949.8	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	12/23/2004	1/22/2005	159520 kWh (thousand Watt-hours)	5228.96	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1/23/2005	2/22/2005	103200 kWh (thousand Watt-hours)	3609.94	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2/23/2005	3/22/2005	63840 kWh (thousand Watt-hours)	2451.61	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3/23/2005	4/22/2005	50880 kWh (thousand Watt-hours)	2286.12	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4/23/2005	5/22/2005	40320 kWh (thousand Watt-hours)	1565.92	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5/23/2005	6/22/2005	30560 kWh (thousand Watt-hours)	1117.29	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	6/23/2005	7/22/2005	18400 kWh (thousand Watt-hours)	674.58	<input type="checkbox"/>	<input type="checkbox"/>



How To

- Create an account
- Navigate Portfolio Manager
- Add a property and enter details about it
- Enter energy and water consumption data
- Enter the Energy Reporting ID number for Boston or Cambridge
- Respond to data requests
- Set Goals and Evaluate Results



Boston/Cambridge Energy Reporting ID

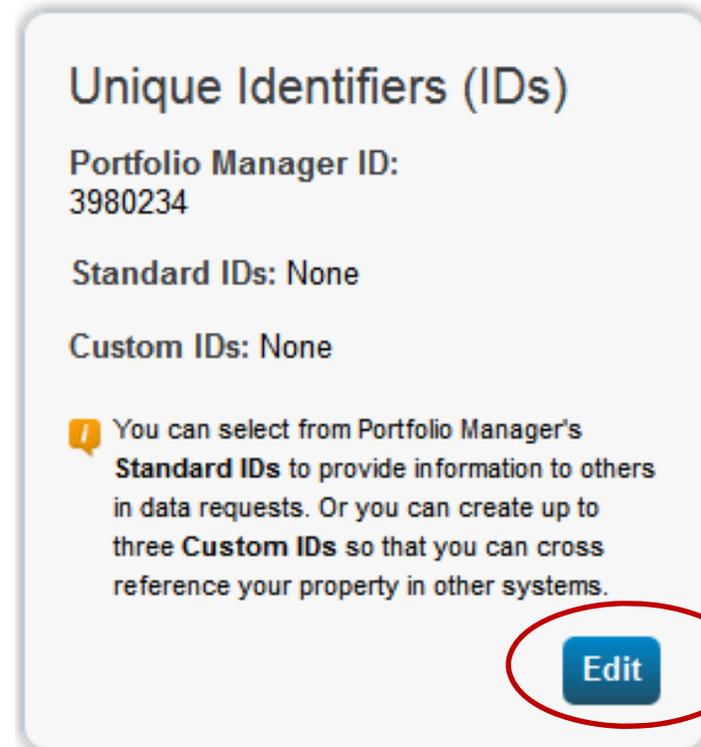
- Every building has a unique number
- Designate this in Portfolio Manager – building-by-building or with a spreadsheet template



City-Specific Energy Reporting ID



- Click a property name
- Details tab
- Scroll down to:





City-Specific Energy Reporting ID

- Scroll down to:

Standard IDs

Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

Standard ID(s):

ID: [+ Add Another](#)



City-Specific Energy Reporting ID

St
Sta
loc
nee
Sta

- Austin Building ID
- Austin Property ID
- BOMA BEST Building ID
- Boston Energy Reporting ID**
- Cambridge Building Energy Reporting ID
- Chicago Energy Benchmarking ID
- CoStar Property ID
- District of Columbia Building Unique ID
- District of Columbia Real Property Unique ID
- Green Globes CIEB Project ID
- Green Globes NC Project ID
- LEED Canada Project ID
- LEED US Project ID
- Minneapolis Building ID
- NYC Borough, Block and Lot (BBL)
- NYC Building Identification Number (BIN)
- Philadelphia Building ID
- REALPac Energy Benchmarking Program Building Name
- San Francisco Building ID
- Seattle Building Energy Benchmarking Reporting ID
- State of Washington Unique Facilities Identifier (UFI)
- U.S. Agency Designated Covered Facility ID
- U.S. Federal Real Property Unique Identifier

ID:

[+ Add Another](#)



City-Specific Energy Benchmarking ID

Enter the number provided by the City for your building or parcel

Standard IDs

Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

Standard ID(s):

Boston Energy Reporting ID ID:

[+ Add Another](#)

Save

[Cancel](#)



City-Specific Energy Reporting ID

Standard IDs

Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

Standard ID(s):

Boston Energy Reporting ID



ID:

1234567890

[+ Add Another](#)

Save

[Cancel](#)



How To

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Submitting Properties to a Data Request

- **Click the Data Request link** sent by the requestor (e.g. City of Boston/City of Cambridge), which will lead to a separate Portfolio Manager login page

A screenshot of the Energy Star Portfolio Manager login page. The page has a light blue header with the Energy Star logo and the text "ENERGY STAR® PortfolioManager®". Below the header, the text "Welcome to Portfolio Manager" is displayed, followed by the subtitle "Helping you track and improve energy efficiency across your entire portfolio of properties." The login form consists of two input fields: "Username:" and "Password:", each with a red asterisk to its right. Below the password field are two links: "[I forgot my password.](#)" and "[I forgot my username.](#)". To the right of these links is a dark blue "Sign In" button. At the bottom right of the form area is a dark blue "Create a New Account" button.



Responding to Data Requests

MyPortfolio | Sharing | Planning | Reporting | Recognition

Complete this form to respond to the "Data Request: Test" for Jon Smith. This response has also been added to your Data Spreadsheet list your Reporting tab.

Respond to Data Request: Data Request: Mary Brown

from Jon Smith (EnergyStar)

About this Data Request

Data Requested By: Jon Smith
For help, contact: Jon Smith at JonS@mybuilding.com

About Your Response

Who is this data being submitted on behalf of?

myself
 someone else

Your Response

Select Information to Include:

Timeframe: * Current Period Ending Date ▾
If the data requestor has specified a timeframe for the request, you will not be able to change it. [Learn more about data requests.](#)

Properties: * - Select Number of Property(ies) - ▾
The data requestor may have asked for one or more [standard IDs](#) to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response. [Learn more about standard IDs.](#)

[Generate Response Preview](#) [Cancel](#)

About this Data Request

Data Requested By: Jon Smith
For help, contact: Jon Smith at JonS@mybuilding.com

About Your Response

Who is this data being submitted on behalf of?

myself
 someone else

Your Response

Select Information to Include:

Timeframe: * Current Period Ending Date ▾
If the data requestor has specified a timeframe for the request, you will not be able to change it. [Learn more about data requests.](#)

Properties: * - Select Number of Property(ies) - ▾
The data requestor may have asked for one or more [standard IDs](#) to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response. [Learn more about standard IDs.](#)

[Generate Response Preview](#) [Cancel](#)

Property Managers & Service Providers can submit on behalf of others





Data Requests Available on the Reporting Tab

After the first login through the separate login page, Data Requests will be listed on the Reporting tab

MyPortfolio | Sharing | Planning | **Reporting** | Recognition

Charts & Graphs

Source EUI
What is the total energy footprint of my properties, including raw fuel associated with generation and transmission?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Score Card](#)

Templates & Reports (8) Create a New Template

Name	Status	Action
Water Performance	No Report Generated	I want to...
Sustainable Buildings Checklist Report	No Report Generated	I want to...
Performance Highlights	No Report Generated	I want to...
Partner of the Year Report	No Report Generated	I want to...
Fuel Performance	No Report Generated	I want to...
ENERGY STAR Certification Status	No Report Generated	I want to...
Energy Performance	No Report Generated	I want to...
Emissions Performance	No Report Generated	I want to...

Create and generate Reports & respond to Data Requests





Data Request Preview

MyPortfolio | Sharing | Planning | **Reporting** | Recognition

A preview for your response to the data request "Data Request: Test" on behalf of Mary Brown (EnergyStar) is being generated.

You may view your response preview using the action menu in the table below by selecting "View Response Preview" or for really large spreadsheets, "Download Response Preview." Large responses may take a long time to prepare. After you have viewed your response, you must select "Send Response" in order for your data to be released.

Please note that each property you included must have a full 12 months of information for each timeframe you included. Otherwise, the metrics you selected may not be able to be calculated. When this happens, "N/A" will be displayed in your spreadsheet.

Charts & Graphs

Site EUI
Based on the energy consumption measured by my meters, how much energy are my properties consuming relative to their sizes?

[Learn More About Using Charts & Graphs](#)

ENERGY STAR Performance Documents

- Statement of Energy Performance
- Statement of Design Intent
- Data Verification Checklist
- Progress & Target Reports
- ENERGY STAR Scorecard

[Learn More About Report Downloads](#)

[Create a New Template](#)

Templates & Reports (3)

Your new response preview(s) has been generated.

Name	Date	Action
Data Request: Test (Request from Jon Smith)	Response Preview Generated: 5/13/2013 5:43 PM	I want to...
Sample EPA Report #2	No Spreadsheet Generated	I want to...
Sample EPA Report #1	No Spreadsheet Generated	I want to...

Reporting Tab

Data Request displays in "Templates & Reports" list

I want to...

- I want to...
- Edit Properties and Timeframe
- Preview Response
- Download Preview in Excel
- Generate an Updated Response
- Send Response
- Delete Response



Respond to Data Request

MyPortfolio | Sharing | Planning | Reporting | Recognition

Confirm Response to Data Request from Mary Brown(EnergyStar)

By clicking Send Data, you will release data to Mary Brown (EnergyStar). You will receive a confirmation email with a receipt and a copy of the data attached.

1 Who (besides you) should we send a confirmation email to?
Select contacts from your contacts book:

Miller, Clara
Smith, Paul

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

2 What format would you like your data in for the email attachment?

Excel
 XML

3 E-Sign your Data Response

I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Mary Brown with EnergyStar.

Your username: *

Your password: *

About Releasing Your Data
Once you have selected to release your data, there is no way to retract it. Please [preview](#) your report to identify any data issues before sending to avoid incomplete or incorrect data being released.

About Signing Your Response
Please provide login credentials (username and password) to electronically sign your response.



Automatic Confirmation of Data Submittal

From: donotreply@energystar.gov <donotreply@energystar.gov>
Sent: Thursday, February 27, 2014 7:28 AM
To: Nils Klinkenberg
Subject: Receipt for Data Request Submittal

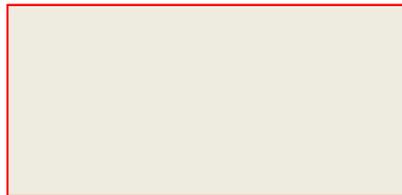
Dear Nils Klinkenberg;

This is to confirm the receipt of the following Data Request:

Response sent: 02/27/2014 7:28 AM

Response includes: 1 properties

Response sent to:



Response sent by:
Nils Klinkenberg
The Cadmus Group, Inc.,
7700 Old Georgetown Rd
Bethesda, MD 20814

Response sent on behalf of:
Nils Klinkenberg

*Includes spreadsheet attachment of the data submitted.

“Response sent to” field will indicate **City of Boston** or **City of Cambridge**, with an address.



How To

- Create an account
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- Respond to data requests
- **Set Goals and Evaluate Results**



Evaluating Results: Reporting Tools

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Charts & Graphs

Source EUI
What is the total energy footprint of my properties, including raw fuel associated with generation and transmission?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Score Card](#)

Templates & Reports (8)

[Create a New Template](#)

Name	Status	Action
Water Performance	No Report Generated	<input type="text" value="I want to..."/>
Sustainable Buildings Checklist Report	No Report Generated	<input type="text" value="I want to..."/>
Performance Highlights	No Report Generated	<input type="text" value="I want to..."/>
Partner of the Year Report	No Report Generated	<input type="text" value="I want to..."/>
Fuel Performance	No Report Generated	<input type="text" value="I want to..."/>
ENERGY STAR Certification Status	No Report Generated	<input type="text" value="I want to..."/>
Energy Performance	No Report Generated	<input type="text" value="I want to..."/>
Emissions Performance	No Report Generated	<input type="text" value="I want to..."/>

Choose from Pre-set Chart & Graph options

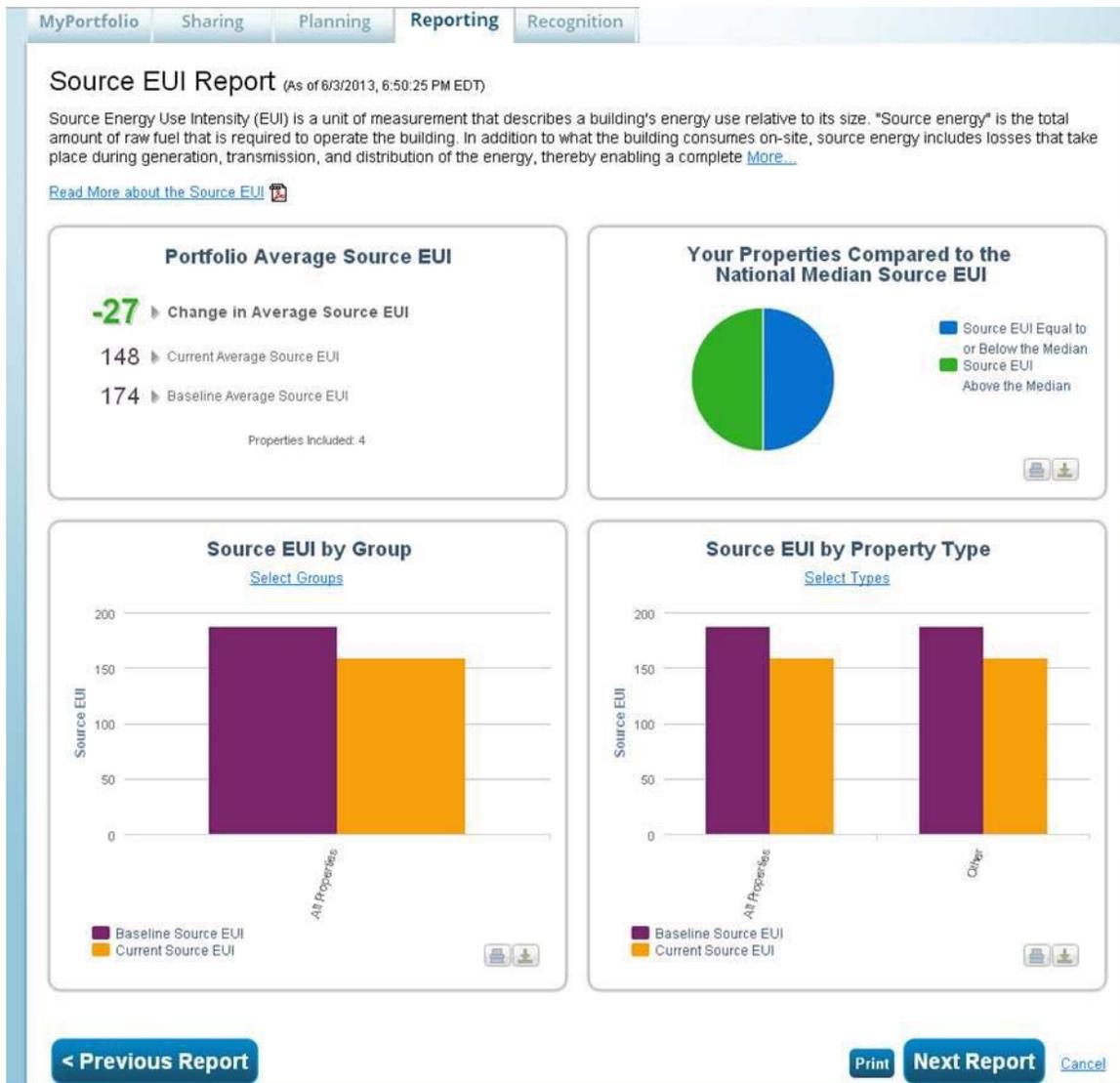
Download Performance Documents

Create and generate Templates & Reports





Reporting: Charts & Graphs



- Each figure can be printed or downloaded for easy insertion into a presentation or document
- Scroll down to view and export raw data for charts & graphs



Standard Templates & Reports

- Performance Highlights
- Energy Performance
- Emissions Performance
- Water Performance
- Fuel Performance
- ENERGY STAR Certification Status
- Partner of the Year Report
- Sustainable Buildings Checklist Report
- **Custom Reports** with >1000 possible metrics



Setting Goals & Tracking Progress: Property-Level

Goals tab at the Property level in MyPortfolio

MyPortfolio | Sharing | Planning | Reporting | Recognition

Hill Store
 602 Highway 6 West, Arlington, VA 20221 | [Map It](#) EXISTING
 Portfolio Manager Property ID: 5000020 | Primarily: [Retail Store](#)
 Year Built: 1995 EXISTING

ENERGY STAR Score
 Current Score: 95
 Baseline Score: 94

Summary | Details | Meters | **Goals** | Design

Energy Performance

Metric	Baseline (Jul 2006)	Current (Aug 2012)
Source EUI	~95	~75
Site EUI	~25	~22

Current Baselines & Targets

Selected Baselines: Energy: Not Set | Water: Not Set
Earliest Baselines: Energy: Jul 2006 | Water: Jul 2006
Operational Target: Target ENERGY STAR Score 80
Design Target: Not Set

[Set Baselines or Target](#)

Generate & Download Performance Reports for this Property

- [Statement of Energy Performance \(SEP\)](#)
- [Score Card](#)
- [Progress & Goals Report](#)
- [Data Verification Checklist](#)

Metrics Comparison for Your Property & Your Target

Metric	Baseline (Jul 2006)	Current (Aug 2012)	Target*	Median Property*
ENERGY STAR score (1-100)	94	95	80	50
Source EUI (kBtu/Sq. Ft./yr)	83.7602304	75.0742056	124.8814	194.8585
Site EUI (kBtu/Sq. Ft./yr)	25.1718121	22.5744176	37.55117510858	58.59291819995

Total Project Investment

Create and generate Templates & Reports

Set Baseline & Targets

Table provides more detail about current and past performance





Add/Edit Baselines or Targets

Choose baselines or let Portfolio Manager select automatically

Target Options

- Target ENERGY STAR Score
- Target % Better than Baseline
- Target % Better than Median

MyPortfolio
Sharing
Planning
Reporting
Recognition

Set Performance Baseline & Target

To establish a performance target, you must first set a baseline for comparison. Then, you can establish an average performance target by either defining a target rating or a target reduction (%). The energy use and costs displayed reflect required levels to meet either the target rating or percent reduction goal for this property.

Baselines

Energy Baseline: Select a baseline: Let Portfolio Manager automatically set my baselines

Water Baseline: Select a baseline: Let Portfolio Manager automatically set my baselines

Operational Target

Target Metric:

Target Value: 1-100 value

Select "Calculate Other Metrics" to refresh the table after making changes to "Target Metric" and "Target Value"

Metric	Baseline (Jul 2006)	Current (Aug 2012)	Target*	Median Property*
ENERGY STAR score (1-100)	94	95	80	50
Source EUI (kBtu/Sq. Ft./yr)	83.7602304	75.0742056	124.8814	194.8585

Selecting Baselines

A [baseline](#) is made up of 12 full calendar months of use information as well as energy or water consumption. It is defined by selecting the last month in the time frame (also known as the [Year Ending Date](#)). Portfolio Manager can automatically determine your baseline by calculating the earliest eligible year ending date.

About Design Targets

Your operational target can be used to track your goals for your property after it has become operational. If your property is in the design stages and has not yet become fully operational, you can use the design features to [set design targets](#). [Learn more about targets](#).

If you are seeing "Not Available"...

Metrics in the Current and Baseline columns require 12 full months of energy consumption and property use information. Depending on which target metric you have selected, baseline information may be required. Median property metrics are 12 full months of operational energy consumption and property use information. If you are seeing "Not Available", then





Portfolio-Level Targets: The 'Planning' Tab

Choose one target or baseline for all properties

View graphs with portfolio-wide information



MyPortfolio | Sharing | **Planning** | Reporting | Recognition

Properties with Targets (5)
[Set One Target for All](#)

Properties That Have Met Set Targets

Yes 14%
No 86%

Properties with Baselines (5)
[Set One Baseline for All](#)

Properties with at Least 12 Months of Information (required for metrics)

Yes 71%
No 29%

My Properties' Targets & Baselines

Name	Energy Baseline	Water Baseline	Target	Target Met	Action
Federal Building	12/31/2003	09/30/2011	Target ENERGY STAR Score of 80		I want to ...
Higher Campus	Not Available	Not Available	Not Set		I want to ...
Hill Store	07/31/2006	07/31/2006	Target ENERGY STAR Score of 80	✓	I want to ...
Insurance Office	04/30/2007	01/31/2009	Target ENERGY STAR Score of 80		I want to ...
Sunnyside Elementary	08/31/2005	07/31/2006	Target ENERGY STAR Score of 80		I want to ...
Supermarket A-1	Not Available	Not Available	Not Set		I want to ...

Page 1 of 1 View 1 - 7 of 7

Want this information in a report? Use EPA's standard spreadsheet template to [select properties](#) and [export this information from your portfolio](#).

I want to ...
 View Property Goals & Improvements
 Add/Edit Baselines or Target
 Add Performance Improvement
 Open Sustainability Checklist

View property-specific details on targets



APPENDIX 2

Bulk Data Uploads with Spreadsheet Templates



Update Data for Many Properties at Once with the Spreadsheet Upload Feature

- Add *new properties* to your account
 - Download spreadsheet
 - Fill in property information
 - Upload spreadsheet
- *For existing properties:* Add meters / edit meter data / edit basic property details / edit property use details
 - Select properties
 - Download custom spreadsheet
 - Fill in data
 - Upload spreadsheet



Bulk Data Entry: Spreadsheet Uploads

Scroll to the bottom of the front page of MyPortfolio tab





Spreadsheet Upload/Update: Overview

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Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet than [entering each property manually](#) or adding bills manually. There are specific steps to use these spreadsheets. Learn more below.

What do you want to upload first?

- **Add new properties to my account** - To get started fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in your template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are finished entering information in your upload template (either standard or custom), upload it here. Processing time could be affected by file size.

Type of Upload:

Upload Template: No file chosen

Select "Browse" to locate the file on your computer and then select "Upload."

Depending on internet speeds, files larger than XX MG may not be able to be successfully uploaded to the server before the session times out. We advise files smaller than XX MG.

[Close](#)

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

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Add New Properties: Download Spreadsheet Template

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Add New Properties: Fill Out Spreadsheet Template

data-import-template_en (3).xls [Compatibility Mode] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	*Property Name	*Street Address	Street Address 2	*City/Municipality	*State/Province	**Other State/Province	*Postal Code	*Country	*Year Built	*Primary Function	*Construction Status	*Gross Floor Area	*GFA Units	*Occup (%)
2	Sample 1	1 Walnut Street		Detroit	NY		65772	United States	1980	Financial Office	Existing	100,000	Sq. Ft.	100
3	Sample 2	123 Main Street		Arlington	AK		22201	United States	2012	Financial Office	Existing	100,000	Sq. Ft.	100
4														
5														
6														
7														
8														
9														
10														
11														

- Complete rows in Excel spreadsheet with information for your properties: name, address, floor area, etc.



Add New Properties: Upload Completed Spreadsheet

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[Close](#)

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them.

Please select type

Please select type

Add New Properties

Add Bills to Existing Meters

Add Meters to Existing Properties

Edit Basic Information for Existing Properties

Upload filled out templates:

- **Select Type**
- **Upload**

Add Meters / Add Bill Data / Edit Basic Property Info

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[Create an Upload Template](#)

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Add Bills to Existing Meters: Create Custom Upload Template

Create a Custom Upload Template

If you want to add property use or meter information for multiple properties, you can do this by using an Excel spreadsheet. First tell us some information about what you are trying to upload to Portfolio Manager so we can create a spreadsheet template for you to use. Then simply fill it in with your information and upload it!

1 Select the Task You are Performing

- Add Meters to Existing Properties
- Add Bills to Existing Meters (i.e., meter consumption information)
- Edit Basic Property Information for Existing Properties (such as name and address)

2 Select Properties to Include

Properties: *

3 Select Detailed Information to Include

Meter Types:

- Electric
 - purchased from the grid
 - How many bills for this type of meter?
- Natural Gas
- Fuel Oil (No. 2)
- Municipally Supplied Potable Water
- Other

Warning - Don't Change Columns!

In order for your upload to work you cannot Add, Delete or Re-Order columns in the custom spreadsheet. We create the template based on your data, and we need a specific format in order for your upload to succeed.

Creating New Properties?

If you need to add new properties, you do not need to create a custom upload template. You can add new properties [manually](#) or by using the [Add Property Excel Template](#).

Selecting Details

The choices provided here correspond to the properties you have selected in Step 2. If you don't see what you are looking for, take a look at the property and make sure that the use or meter types are set up.

Create & Download Template

[Cancel](#)



Add Bills to Existing Meters: Fill Out Spreadsheet Template

	C	D	E	F	G	H	I	J	K	L	M
1	*Property ID	*Property Name	*Meter Name	*Meter Type	*Start Date	*End Date	*Usage	*Meter Unit	Cost	*Estimation	*Green Power?
2	5000017	Hill Store	Electricity	Electricity - Grid Purchase	Last Bill 12/1/2011	12/30/2012	75360	kWh (thousand Watt-hours)	7231.02	No	No
3	5000017	Hill Store	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
4	5000017	Hill Store	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
5	5000018	Federal Building	Electricity	Electricity - Grid Purchase	Last Bill 12/1/2011	12/30/2012	75360	kWh (thousand Watt-hours)	7231.02	No	No
6	5000018	Federal Building	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
7	5000018	Federal Building	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
8	5000019	Insurance Office	Electricity	Electricity - Grid Purchase	Last Bill 1/2/2013	2/1/2013	304080	kWh (thousand Watt-hours)		No	No
9	5000019	Insurance Office	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
10	5000019	Insurance Office	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			

- Complete rows in Excel spreadsheet with new bill data for each meter
- Be sure not to add/delete rows or columns, or to change any formatting