Using ENERGY STAR® Portfolio Manager®

A Workshop for Property Owners & Managers

Use EPA’s Platform to Manage Energy Use and 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 Public Library
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

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

John Bolduc, Environmental Planner
617-349-4628
jbolduc@cambridgema.gov

Bronwyn Cooke, Sustainability Planner
617-349-4604
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
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

<table>
<thead>
<tr>
<th>Year</th>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>City of Boston buildings</td>
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</tr>
<tr>
<td>2014</td>
<td>Nonresidential buildings over 50,000 square feet</td>
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<tr>
<td>2015</td>
<td>Residential buildings over 50,000 square feet or 50 units</td>
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<tr>
<td>2016</td>
<td>Nonresidential buildings over 35,000 square feet</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>Residential buildings over 35,000 square feet or 35 units</td>
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</tr>
</tbody>
</table>

- 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
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.

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)

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<td>FALSE</td>
</tr>
</tbody>
</table>
James Cater
Utility Program Liaison
City of Boston
Eversource Energy
james.cater@eversource.com
Boston BERDO Support – Requesting Usage from National Grid

February 2, 2015
BERDO Support Webpage

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.
Ezra McCarthy
Lead Analyst, C&I Program Strategy, MA

ezra.mccarthy@nationalgrid.com

or

BERDOSupport@nationalgrid.com
Using ENERGY STAR® Portfolio Manager®

A Workshop for Property Owners & Managers

Use EPA’s Platform to Manage Energy Use and 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
Cambridge Public Library
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
• **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](http://www.energystar.gov/benchmark)
Benchmarking with ENERGY STAR is the industry standard.

Cumulative through 2014:
- Over 75,000 active Portfolio Manager accounts nation-wide
- More than 400,000 properties benchmarking energy use
- More than 90,000 properties benchmarking water use in Portfolio Manager
- More than 165,000 properties benchmark energy/water using web services
- More than 25,000 properties are ENERGY STAR certified
State and local programs leverage Portfolio Manager.
Value of Benchmarking

Consistent benchmarking in buildings results in energy savings and improved performance

Access EPA’s Data Trends report series at [www.energystar.gov/datatrends](http://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 Recognition

- ENERGY STAR Certification for Buildings
- Designed to Earn the ENERGY STAR
- EPA’s National Building Competition
- ENERGY STAR Partner of the Year
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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
Getting Help with Portfolio Manager
Where to go for Help

- Portfolio Manager Help Page

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

Sign up at [http://www.energystar.gov/buildings/training](http://www.energystar.gov/buildings/training)
Service & Product Providers- A Useful Resource

• ENERGY STAR Service and Product Providers (SPPs) are businesses and other organizations that use ENERGY STAR tools & resources to help customers:
  – benchmark their buildings
  – achieve energy performance improvements
  – earn ENERGY STAR recognition

• See our list of most active SPPs
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/
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
How To

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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

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
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
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– 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
Get Data In: 2. Spreadsheet Upload

Upload and/or Update Multiple Properties

What do you want to upload first?
- Add new properties to my account
- Edit/upload my existing properties

Add Properties
You can create new properties in Portfolio Manager by filling in the spreadsheet which requires basic property information, including name, address, gross floor area, Property ID's, and Federal Information (if applicable).

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 the size.

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.

Follow Us
Get Data In: Working with a 3rd Party to Exchange Data via “Web Services”

• XML “web services” enable energy service companies and utilities to exchange data with Portfolio Manager 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
Add a Property (Manually)
Add a Property

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
Add a Property

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**

- ACME Bank
- 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

**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.

**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!](#)
Basic Property Information

Set Up a Property: Basic Property Information

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

About Your Property

- **Name:**
- **Country:**
- **Street Address:**
- **City/Municipality:**
- **State/Province:**
- **Postal Code:**
- **Year Built:**
- **Gross Floor Area:**
  - **Sq. Ft.**
  - **Temporary Value**
- **Occupancy:**
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.

Follow Us

Contact Us | Privacy Policy | Browser Requirements | ENERGY STAR Buildings & Plants Website
Enter Values for Property Use Details

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.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
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</thead>
<tbody>
<tr>
<td>Gross Floor Area</td>
<td>12000</td>
<td>01/01/1992</td>
<td></td>
</tr>
</tbody>
</table>

Weekly Operating Hours

Number of Workers on Main Shift

Number of Computers

Number of Cash Registers

Cooking Facilities

Number of Open or Closed Refrigeration/Freezer Units

Number of Walk-in Refrigeration/Freezer Units

Percent That Can Be Heated

Percent That Can Be Cooled

Number of Workers on Main Shift
MyPortfolio: Property Summary Tab

Supermarket A-1
1234 Main St., Arlington, VA 22201
Portfolio Manager Property ID: 5000066
Year Built: 1992

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.

Summary

Source EUI Trend

Notifications
You have no new notifications.

Sharing this Property
Shared with: 0 Contacts (ABS)
Enter name

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

Use to enter a campus or other collection of non-submetered buildings
Multi-Building Properties (e.g. a Campus)

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.
How To

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– 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: 5001066 | Primarily: Supermarket/Grocery Store
Year Built: 1992 EXISTING

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)

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

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 (724850)

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

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 Recycled Water
- Alternative Water Generated On-Site
- Other

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
  - generated on site with my own solar panels
  - generated on site with my own wind turbines
- Natural Gas
  - How Many Meters?
  - 1

- 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?
    - 1
  - Outdoor
  - All
- Municipally Supplied Reclaimed Water
- Alternative Water Generated On-Site
- Other
# About your Meters

## 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)

<table>
<thead>
<tr>
<th>Meter Name</th>
<th>Type</th>
<th>Units</th>
<th>First Bill Date</th>
<th>In Use?</th>
<th>End Date</th>
<th>Enter as Delivery?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural Gas</td>
<td>Natural Gas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electric Grid Meter</td>
<td>Electric - Grid</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Delete Selected Entries
- Add Another Entry

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

<table>
<thead>
<tr>
<th>Meter Name</th>
<th>Type</th>
<th>Units</th>
<th>First Bill Date</th>
<th>In Use?</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potable Indoor Meter</td>
<td>Potable Indoor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Delete Selected Entries
- Add Another Entry

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Click in Table to Edit Meter Information

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)

<table>
<thead>
<tr>
<th>Meter Name</th>
<th>Type</th>
<th>Units</th>
<th>First Bill Date</th>
<th>In Use?</th>
<th>End Date</th>
<th>Enter as Delivery?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural Gas</td>
<td>Natural Gas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electric Grid Meter</td>
<td>Electric Grid</td>
<td>kWh (thousand)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Delete Selected Entries
Add Another Entry

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

<table>
<thead>
<tr>
<th>Meter Name</th>
<th>Type</th>
<th>Units</th>
<th>First Bill Date</th>
<th>In Use?</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Potable Indoor Meter</td>
<td>Potable Indoor</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Delete Selected Entries
Add Another Entry

Follow Us

Continue
Add Energy Consumption Information

Expand meter by clicking arrow
Add Meter Entries and Fill in Data

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:

<table>
<thead>
<tr>
<th>Meter Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Electricity</td>
</tr>
<tr>
<td>Natural Gas</td>
</tr>
<tr>
<td>Fuel Oil (No. 2)</td>
</tr>
</tbody>
</table>

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:

<table>
<thead>
<tr>
<th>Meter Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Water</td>
</tr>
</tbody>
</table>

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
Property Meters Tab: Meters Added and Displayed

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: 6000071 | Primarily: Supermarket/Grocery Store
Year Built: 1992 EXISTING

Energy & Water Consumption
Manage/Enter My Bills

Meters for Total Consumption
View/Edit

Energy Meters (2)

<table>
<thead>
<tr>
<th>Name</th>
<th>Energy Type</th>
<th>Most Recent Bill Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Natural Gas</td>
<td>Natural Gas</td>
<td>04/30/2012</td>
<td>I want to...</td>
</tr>
<tr>
<td>Electric Grid Meter</td>
<td>Electric - Grid</td>
<td>03/31/2012</td>
<td>I want to...</td>
</tr>
</tbody>
</table>

Water Meters (1)

<table>
<thead>
<tr>
<th>Name</th>
<th>Water Meter</th>
<th>Most Recent Bill Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Water Meter</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
View Meter Data and Manage Bills for your Property

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:

| Start Date | End Date | Usage       | Cost    | Estimation | Green Power?
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>8/23/2004</td>
<td>9/22/2004</td>
<td>50400 kWh</td>
<td>4010.43</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9/23/2004</td>
<td>10/22/2004</td>
<td>36320 kWh</td>
<td>2271.72</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/23/2004</td>
<td>12/22/2004</td>
<td>114720 kWh</td>
<td>3949.8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/23/2004</td>
<td>1/22/2005</td>
<td>159520 kWh</td>
<td>5228.96</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1/23/2005</td>
<td>2/22/2005</td>
<td>103200 kWh</td>
<td>3609.94</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/23/2005</td>
<td>3/22/2005</td>
<td>63840 kWh</td>
<td>2451.61</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5/23/2005</td>
<td>6/22/2005</td>
<td>30560 kWh</td>
<td>1117.29</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6/23/2005</td>
<td>7/22/2005</td>
<td>18400 kWh</td>
<td>674.58</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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:
City-Specific Energy Reporting ID

- 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 (UF1)
- U.S. Agency Designated Covered Facility ID
- U.S. Federal Real Property Unique Identifier
Enter the number provided by the City for your building or parcel.
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

Save  Cancel
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
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.
Responding to Data Requests

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.

Create and generate Reports & respond to Data Requests.
Data Request Preview

Reporting Tab

Data Request displays in “Templates & Reports” list

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

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:  
   * 

   [E-Sign Response]  

   [Send Data]  

   [Cancel]
Automatic Confirmation of Data Submittal

*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
– 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
Evaluating Results: Reporting Tools

Choose from Pre-set Chart & Graph options

Create and generate Templates & Reports

Download Performance Documents
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
- 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

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.

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

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.
Spreadsheet Upload/Update: Overview

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).

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

Type of Upload: Please select type
Upload Template: Choose File: No file chosen
Upload

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

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

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

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 filing in this spreadsheet which requires basic property information, including name, address, gross floor area, Property ID, and federal information if applicable.

[Add Property 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: Please select type

Upload Template: Choose File: No file chosen

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

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

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Add New Properties: Fill Out Spreadsheet Template

<table>
<thead>
<tr>
<th></th>
<th>Property Name</th>
<th>Street Address</th>
<th>City/Municipality</th>
<th>State/Province</th>
<th>Postal Code</th>
<th>Country</th>
<th>Year Built</th>
<th>Primary Function</th>
<th>Construction Status</th>
<th>Gross Floor Area</th>
<th>GFA Units</th>
<th>Occup. [%]</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Sample 1</td>
<td>1 Walnut Street</td>
<td>Detroit</td>
<td>NY</td>
<td>85772</td>
<td>United States</td>
<td>1980</td>
<td>Financial Office</td>
<td>Existing</td>
<td>100,000</td>
<td>Sq. Ft.</td>
<td>100</td>
</tr>
<tr>
<td>3</td>
<td>Sample 2</td>
<td>128 Main Street</td>
<td>Arlington</td>
<td>AK</td>
<td>22201</td>
<td>United States</td>
<td>2012</td>
<td>Financial Office</td>
<td>Existing</td>
<td>100,000</td>
<td>Sq. Ft.</td>
<td>100</td>
</tr>
</tbody>
</table>

- Complete rows in Excel spreadsheet with information for your properties: name, address, floor area, etc.
Add New Properties: Upload Completed Spreadsheet

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).

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: Please select type
- Upload Template: Choose File

Select "Browse" to locate the file on your computer and then select "Upload."
Depending on internet speeds, files larger than XX may not be able to be successfully uploaded to the server the session times out. We advise files smaller than...

Add New Properties
Add Bills to Existing Meters
Add Meters to Existing Properties
Edit Basic Information for Existing Properties

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Add Meters / Add Bill Data / Edit Basic Property Info

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.

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: *Please select type

Upload Template: *Choose File No file chosen

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

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

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).

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 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: All Properties

3. Select Detailed Information to Include
   - Meter Types:
     - Electric
     - Gas
     - Fuel Oil
     - Municipally Supplied Potable Water
     - Other
   - How many bills for this type of meter? 3

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
Add Bills to Existing Meters: Fill Out Spreadsheet Template

- 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
APPENDIX 3A

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**

**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 01/01/2008 precedes 01/02/2008. 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.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Usage</th>
<th>Cost</th>
<th>Estimation</th>
<th>Green Power?</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/1/2005</td>
<td>9/30/2005</td>
<td>42702.0 kWh (thousand Watt-hours)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10/1/2005</td>
<td>10/31/2005</td>
<td>36984.0 kWh (thousand Watt-hours)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/1/2005</td>
<td>11/30/2005</td>
<td>38496.0 kWh (thousand Watt-hours)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **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.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Usage</th>
<th>Cost</th>
<th>Estimation</th>
<th>Green Power?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/5/2006</td>
<td>2/3/2006</td>
<td>35496.0 kWh (thousand Watt-hours)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/4/2006</td>
<td>3/6/2006</td>
<td>35736.0 kWh (thousand Watt-hours)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **Electricity** has a gap of 35 days between the dates of 11/30/2005 and 01/05/2006. Please close the gap.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Usage</th>
<th>Cost</th>
<th>Estimation</th>
<th>Green Power?</th>
</tr>
</thead>
<tbody>
<tr>
<td>4/5/2006</td>
<td>5/3/2006</td>
<td>36672.0 kWh (thousand Watt-hours)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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
Gross Floor Area Alert

This Property’s Overall Use

<table>
<thead>
<tr>
<th>Name</th>
<th>Primary Function</th>
<th>Gross Floor Area</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parking Use</td>
<td>Parking</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vacant Space</td>
<td>Office</td>
<td>10000</td>
<td></td>
</tr>
<tr>
<td>Building Use</td>
<td>Office</td>
<td>100000</td>
<td></td>
</tr>
</tbody>
</table>

To add multiple uses and buildings to this property, you can use this spreadsheet template to upload your information.

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
APPENDIX 3B

Troubleshooting Responses to a City Data Request
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”…
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.
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