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

<table>
<thead>
<tr>
<th>December 31st, 2014</th>
<th>May 1st, 2015</th>
<th>May 1st, 2016 (and every May 1st thereafter)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Municipal buildings</strong>&lt;br&gt;10,000 sq ft or greater</td>
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</tr>
<tr>
<td><strong>Parcels with non-residential buildings</strong>&lt;br&gt;singly or together contain 50,000 sq ft or greater</td>
<td><strong>Parcels with non-residential buildings</strong>&lt;br&gt;singly or together contain 25,000 sq ft or greater</td>
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<tr>
<td><strong>Parcels with residential buildings</strong>&lt;br&gt;singly or together with 50 units or more</td>
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</tr>
</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
• 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
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>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>City of Boston buildings</td>
</tr>
<tr>
<td>2014</td>
<td>Nonresidential buildings over 50,000 square feet</td>
</tr>
<tr>
<td>2015</td>
<td>Residential buildings over 50,000 square feet or 50 units</td>
</tr>
<tr>
<td>2016</td>
<td>Nonresidential buildings over 35,000 square feet</td>
</tr>
<tr>
<td>2017</td>
<td>Residential buildings over 35,000 square feet or 35 units</td>
</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.
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<thead>
<tr>
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<th>Cost</th>
<th>Estimated Value</th>
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<td></td>
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</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.
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Lead Analyst, C&I Program Strategy, MA

ezra.mccarthy@nationalgrid.com

or

BERDOSupport@nationalgrid.com
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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
Cambridge City Hall Annex
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
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

Join at: [www.energystar.gov/join](http://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
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

**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:**

<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>427920 kWh (thousand Watt-hours)</td>
<td></td>
<td></td>
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<tr>
<td>10/1/2005</td>
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<td>369840 kWh (thousand Watt-hours)</td>
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<tr>
<td>11/1/2005</td>
<td>11/30/2005</td>
<td>384960 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 04/06/2006. Please close the gap.

**Don't see the meter you are looking for? Add another meter.**

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
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<th>Cost</th>
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</tr>
</thead>
<tbody>
<tr>
<td>1/5/2006</td>
<td>2/3/2006</td>
<td>354960 kWh (thousand Watt-hours)</td>
<td></td>
<td></td>
<td></td>
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</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 04/06/2006. Please close the gap.
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

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.

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
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**
Getting Help with Portfolio Manager
Where to go for Help

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

- Create an account
- Navigate Portfolio Manager
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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

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

Property level
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
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 - 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

Depending on Internet speed, files larger than 20 MB may not be able to be successfully uploaded to the server before the session times out. We advise files smaller than 20 MB.
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](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

Standard User
Facility/Operations Manager

Retrieve reporting metrics

Portfolio Manager Account

Share access to existing properties

Input energy and property data

Manual Entry
~10 properties

Retrieve reporting metrics: energy performance ratings, EUIs, emissions

Portfolio Manager Database

Import/Update Templates
~100 properties

Software Developer
Energy Information Software and Services

Retrieve customer lists and reports

Manage account and sharing

Input energy and property data

REST-based Web Services
>100 properties

Machine-to-machine data exchange

High frequency transactions and integration with third-party software
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.

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

- 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 setup 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!
Basic Property Information

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.

EPA
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.

Continue  Cancel

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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

Continue  Cancel

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Enter Values for Property Use Details

Building Use

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>
</tr>
</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/Units

Number of Walk-in Refrigeration/Freezer/Units

Percent That Can Be Heated

Percent That Can Be Cooled

Number of Workers on Main Shift

Add Property
MyPortfolio: Property Summary 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

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

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

Energy Meters (0)
* View as a Diagram

Meters for Total Consumption
* View/ed

Utility & Weather
Electric Distribution Utility (EDU):
Virginia Electric & Power Co [Dominion Resources Inc]
Regional Power Grid:
Virginia/Carolina
Weather Station:
WASHINGTON/NATIONAL (724850)

Water Meters (0)
* View as a Diagram

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: 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/Carolinas
Weather Station:
WASHINGTON/NATIONAL (724050)

Energy Meters (0)
View as a Diagram

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

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.
- Municpally Supplied Potable Water
- Municpally Supplied Reclaimed Water
- Alternative Water Generated On-Site
- Other

Get Started!  Cancel
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? 1
  - 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](#)

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

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

Back

Continue

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Add Energy Consumption Information

Your Meter Entries for Supermarket A-1

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

2 Energy Meter(s) for Supermarket A-1

- **Natural Gas**
  - Edit
  - Delete Meter

- **Electric Grid Meter**
  - Edit
  - Delete Meter

1 Water Meter(s) for Supermarket A-1

- **Potable Indoor Meter**
  - Edit

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

Click the “+” to add entries. You can upload an excel spreadsheet with your basic bill information using our spreadsheet template. Click the “Finish Meter Set Up” button to complete the setup.

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:

- [ ] Electricity
- [x] Natural Gas
- [x] 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:

- [ ] 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
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
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

Utility & Weather
- Electric Distribution Utility (EDU):
  Virginia Electric & Power Co. [Dominion Resources Inc]
  Regional Power Grid:

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

Energy Meters (2)
- View as a Diagram

<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)
- View as a Diagram

<table>
<thead>
<tr>
<th>Name</th>
<th>Water Meter</th>
<th>Most Recent Bill Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portable Indoor</td>
<td></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:

<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>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:

[Image showing the MyPortfolio page with an example building information and the Details tab highlighted]

[Image showing the Unique Identifiers (IDs) section with options to select Standard or Custom IDs and an edit button]
City-Specific Energy Reporting ID

• Scroll down to:
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 (UFI)
- U.S. Agency Designated Covered Facility ID
- U.S. Federal Real Property Unique Identifier
City-Specific Energy Benchmarking ID

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

Add Another

Save
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

Responding to Data Requests

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
Properties: Select Number of Property(ies)

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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

A preview for your response to the data request "Data Request: Test" on behalf of Mary Brown (Energy Star) 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 13 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.

Energy Star Performance Documents

- Statement of Energy Performance
- Statement of Design Intent
- Site Verification Checklist
- Progress & Targets Reports
- ENERGY STAR Dashboard

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

Your new response preview(s) has been generated.

<table>
<thead>
<tr>
<th>Name</th>
<th>Data</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Request: Test (Request from Jon Smith)</td>
<td>Response Preview Generated: 5/13/2013 3:43 PM</td>
<td>I want to...</td>
</tr>
<tr>
<td>Sample EPA Report #2</td>
<td>No Spreadsheet Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Sample EPA Report #1</td>
<td>No Spreadsheet Generated</td>
<td>I want to...</td>
</tr>
</tbody>
</table>
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

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:

Send Data
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
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– Enter the Energy Reporting ID number for Boston or Cambridge
– Respond to data requests
– Set Goals and Evaluate Results
### Evaluating Results: Reporting Tools

#### Charts & Graphs

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

#### Templates & Reports (8)

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Water Performance</td>
<td>No Report Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Sustainable Buildings Checklist Report</td>
<td>No Report Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Performance Highlights</td>
<td>No Report Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Partner of the Year Report</td>
<td>No Report Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Fuel Performance</td>
<td>No Report Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>ENERGY STAR Certification Status</td>
<td>No Report Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Energy Performance</td>
<td>No Report Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Emissions Performance</td>
<td>No Report Generated</td>
<td>I want to...</td>
</tr>
</tbody>
</table>

#### Download Performance Documents

- Statement of Energy Performance
- Statement of Energy Design Intent
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Score Card

#### Choose from Pre-set Chart & Graph options

#### 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

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).

#### 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.

### 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 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: 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 the box below.
- Edit/Upload my existing properties - To do this you will need to tell us which properties you want to upload 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 the spreadsheet which requires basic property information, including name, address, gross floor area, Property ID(s), 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: 
- Please select

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 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>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td><strong>Property Name</strong></td>
<td><strong>Street Address</strong></td>
<td><strong>City/Municipality</strong></td>
<td><strong>State/Province</strong></td>
<td><strong>Postal Code</strong></td>
<td><strong>Country</strong></td>
<td><strong>Year Built</strong></td>
<td><strong>Primary Function</strong></td>
<td><strong>Construction Status</strong></td>
<td><strong>Gross Floor Area</strong></td>
<td><strong>GFA Units</strong></td>
<td><strong>Occup [%]</strong></td>
<td></td>
</tr>
<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>
<td></td>
<td></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>
<td></td>
<td></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. 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

Follow Us: Energy Star

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

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 ID's, and Federal Information (if applicable).

Add Properties Template

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.
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
     - Natural Gas
     - Fuel Oil (No. 2)
     - 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

<table>
<thead>
<tr>
<th>Property ID</th>
<th>Property Name</th>
<th>Meter Name</th>
<th>Meter Type</th>
<th>Start Date</th>
<th>End Date</th>
<th>Usage</th>
<th>Meter Unit</th>
<th>Cost</th>
<th>Estimation</th>
<th>PowerT</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Mill Store</td>
<td>Electricity</td>
<td>Electricity - Grid Purchase</td>
<td>Last Bill 1/2/2011, 1/30/2012</td>
<td>73360 kWh (thousand Whistle-hours)</td>
<td>7281.02</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Mill Store</td>
<td>Electricity</td>
<td>Electricity - Grid Purchase</td>
<td>Last Bill 1/2/2011, 1/30/2012</td>
<td>73360 kWh (thousand Whistle-hours)</td>
<td>7281.02</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Federal Building</td>
<td>Electricity</td>
<td>Electricity - Grid Purchase</td>
<td>Last Bill 1/2/2011, 1/30/2012</td>
<td>73360 kWh (thousand Whistle-hours)</td>
<td>7281.02</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Federal Building</td>
<td>Electricity</td>
<td>Electricity - Grid Purchase</td>
<td>Last Bill 1/2/2011, 1/30/2012</td>
<td>73360 kWh (thousand Whistle-hours)</td>
<td>7281.02</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Insurance Office</td>
<td>Electricity</td>
<td>Electricity - Grid Purchase</td>
<td>Last Bill 1/2/2011, 1/30/2012</td>
<td>73360 kWh (thousand Whistle-hours)</td>
<td>7281.02</td>
<td>No</td>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- 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