



# Benchmarking with ENERGY STAR®

*U.S. Environmental Protection Agency (EPA)*  
*2009*



Learn more at [energystar.gov](http://energystar.gov)

# Washington Climate Change and Energy Efficiency Legislation

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- **ESSSB 5854**
  - Climate Pollution Reduction - Energy Efficiency, an act aimed at reducing climate pollution in the built environment
- **ESSSB 5560**
  - State Agencies - Emission Reduction, an act related to state agency climate leadership
- **Executive Order 05-01**
  - Establishes Sustainability and Efficiency Goals for State Operations
- **Executive Order 07-02**
  - Washington Climate Change Challenge
- **Executive Order 09-05**
  - Washington's Leadership on Climate Change

# ESSSB 5854: Climate Pollution Reduction - Energy Efficiency



## Summary of Main Portfolio Manager-related requirements:

- By 1/1/2010, GA shall establish a state Portfolio Manager master account.
- By 7/1/2010, each qualifying public agency shall:
  - Create energy benchmark for each public facility using Portfolio Manager
  - Report to GA, the EPA national energy performance rating
  - Link all accounts to the state Portfolio Manager master account
- By 7/1/2010, GA shall:
  - Make reports available through the Portfolio Manager Web site
  - Develop a technical assistance program to facilitate energy audits
- Beginning 12/1/2012, GA shall prepare a biennial report summarizing the statewide Portfolio Manager master account data.
- By 7/1/2012, qualifying public agencies must undertake a preliminary energy audit.

# Benchmarking



- Benchmarking through ENERGY STAR allows you to:
  - Compare one building against a national sample of similar buildings
  - Compare all of your buildings of a similar type to each other
  - Set priorities for use of limited staff time and/or investment capital



# Benchmarking



## Portfolio Manager

- Benchmark the energy use of all of your buildings – receive an energy use intensity (EUI). Many buildings are eligible to receive energy performance ratings on a 1-100 scale.
- Track changes in energy and water use over time in single buildings, groups of buildings, or entire portfolios.
- Track and report cost savings and CO<sub>2</sub> emissions.
- Apply for the ENERGY STAR.
- [www.energystar.gov/benchmark](http://www.energystar.gov/benchmark)



# Ratable Space Types



## K-12 Schools



## Offices



## Hospitals



## Supermarkets



## Hotels



## Retail Stores

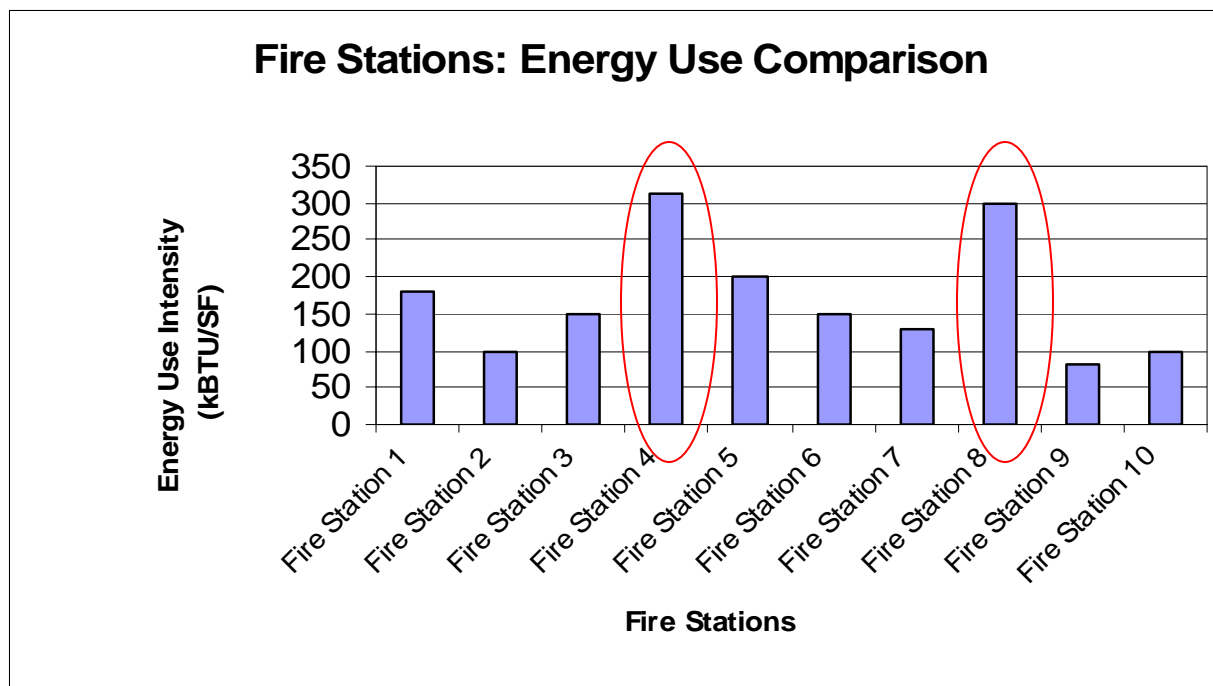


**Others include: Warehouse, Residence Halls, Courthouses, Medical Offices, Financial Centers/Banks, and Wastewater Treatment Plants**

# Identify Best Opportunities and Set Improvement Goals



- Identify under-performing buildings to target for energy efficiency improvements.
- Establish baselines to set goals and measure progress





# Track Progress Over Time

- Set a baseline and monitor energy efficiency improvements over time
- View percent improvement in weather-normalized energy use intensity.
- Track reductions in greenhouse gas emissions.
- Monitor energy and water costs

Facility Name ☑	Current Source Energy Intensity (kBtu/Sq. Ft.) i	Change from Baseline: Adjusted Energy Use (%) i	Change from Baseline: Energy Use Intensity (kBtu/Sq. Ft.) i	Change from Baseline: GHG Emissions (MtCO <sub>2</sub> e) i	Total Energy Cost per Sq. Ft. (US Dollars (\$)) i
<a href="#">Fire Station 1</a>	160.1	-12.3	-6.1	-275.86	\$0.30
<a href="#">Fire Station 2</a>	172.6	-18.3	-10.7	-488.62	\$0.37

[Download](#) in Excel





# Document Savings Results

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- Provide *transparency* and *accountability* to help demonstrate strategic use of capital improvement funding.
- Quickly and accurately demonstrate savings for an individual building or entire portfolio:
  - Energy use
  - GHG emissions
  - Water use
  - Energy costs
- Download performance metrics from Portfolio Manager into Excel.
- Generate a Statement of Energy Performance (SEP) for each building, summarizing important performance indicators, including energy intensity and CO<sub>2</sub> emissions.
- Generate an Energy Performance Report showing reductions in key indicators over a user-specified time period.

Visit [www.energystar.gov/benchmark](http://www.energystar.gov/benchmark) to get started



# Before You Start



## Collect building information

- **Building Identifiers**

Name, street address, zip code for weather normalization

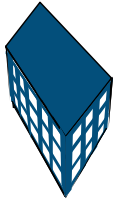
- **Space Type Data**

- Other Space Types (space types that do not currently receive a rating such as museums, fire stations, etc.): Square footage
- Office: Square footage, hours of operation, Number of workers on main shift , # of PC's, Percent of gross floor area that is air conditioned, heated
- See [Benchmarking Toolkit](#) for space data required for other ratable space types

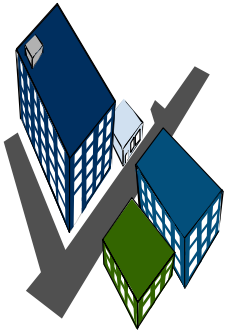
- **Energy Use**

- Building specific invoice information from all purchased energy. Begin with at least 11 consecutive months for each fuel type for the same period and update with monthly usage data.

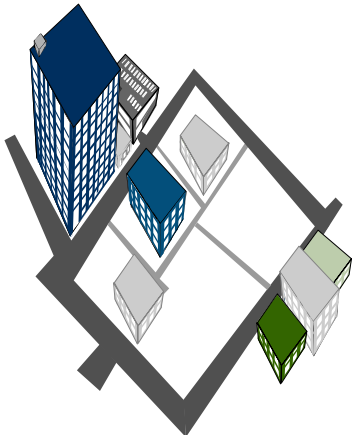
# How to Access Portfolio Manager



- **Single Building Manual Entry**
  - Enter building and energy consumption information into Portfolio Manager.



- **Bulk Data Upload**
  - Upload large sets of building data in Portfolio Manager using an Excel template.



- **Automated Benchmarking Services**
  - Use Service and Product Provider to have the rating automatically integrated into your energy information and bill handling system
- **Utility-based Automated Benchmarking**
  - Option 1: Provide utility data
  - Option 2: Provide automated benchmarking services

# Portfolio Manager

## Four Simple Steps

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1. Create a Portfolio Manager account
2. Add a property
3. Add a space
4. Add energy meters



# Creating, Editing and Accessing a Portfolio Manager Account


# Creating an Account




Visit [www.energystar.gov](http://www.energystar.gov)

# Creating an Account





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**SUPERIOR ENERGY MANAGEMENT  
CREATES ENVIRONMENTAL LEADERS**  
U.S. Environmental Protection Agency

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**Millard Fillmore Gates Hospital**  
3 Gates Circle  
Buffalo, NY 14209

## Buildings & Plants

Improving the energy efficiency of the places where we work, play and learn helps us save energy, save money, and fight global warming. Look for facilities that have earned the ENERGY STAR – the national mark of excellence in energy performance – and know with confidence that the facilities are energy efficient and have a smaller carbon footprint.

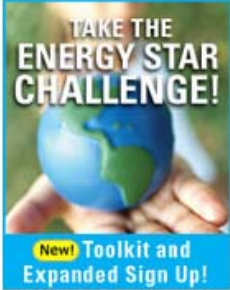
[View All Labeled Facilities](#)

## Strategy

**[Guidelines for Energy Management](#)**  
Get started by applying our proven strategy to set performance goals, create and implement action plans, assess performance and progress, and recognize your organization's achievements.

**[Commercial Building Design](#)**  
Make energy performance a priority in your next building's design. Use [Target Finder](#) to set your energy performance target.

**[Green Buildings and Energy Efficiency](#)**  
Make sure your buildings deliver environmental and financial results.



**TAKE THE  
ENERGY STAR  
CHALLENGE!**  
**New! Toolkit and  
Expanded Sign Up!**


### Quick Finder

- [Portfolio Manager Login](#)
- [Target Finder](#)
- [ENERGY STAR Challenge](#)
- [ENERGY STAR Leaders](#)
- [Earn the ENERGY STAR](#)
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# Creating an Account



**PORTFOLIO MANAGER**  
EPA's system for helping you track and improve energy efficiency across your entire portfolio of buildings.

[FAQ](#) [FREQUENTLY ASKED QUESTIONS](#) [CONTACT US](#) [HELP](#)

**WHAT'S NEW IN PORTFOLIO MANAGER**

**ENERGY STAR Labeled Building Press Release Announcement** [Learn More](#)

**Water Treatment and Distribution Facilities**  
The EPA is pleased to announce the addition of Water Treatment and Distribution Facilities to Portfolio Manager. [Learn More](#)

**Portfolio Manager Enhancements (Spaces Not Eligible to Receive a Rating)**  
Portfolio Manager now provides users the ability to manage buildings that are eligible to receive a rating as well as those that are not – all within the same online platform. [Learn More](#)

Username:   
[Forgot your username?](#)

Password:   
[Forgot Your Password?](#)

**New User? [Register](#)** [Login](#)



**About Portfolio Manager**

- [Learn](#) what Portfolio Manager can do for your organization
- [Take](#) the Portfolio Manager Tour
- [Explore](#) some Frequently Asked Questions about our October 1, 2007 Updates
- [Train](#) on how to use Portfolio Manager
- [Review](#) eligibility requirements to benchmark your facility
- [Import](#) facility data

**Success through ENERGY STAR**

- [Learn](#) about ENERGY STAR Leaders that have improved organization-wide
- [Take](#) the ENERGY STAR Challenge – improve your buildings' energy efficiency by 10%
- [Find](#) buildings that have earned the ENERGY STAR

**ENERGY STAR Labeled Buildings**

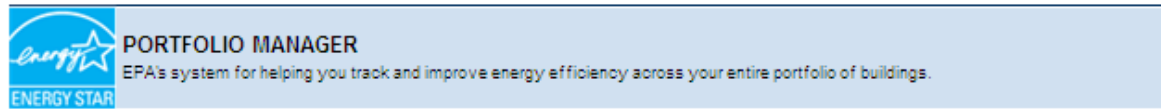


**Ada County Courthouse & Administration Bldg**  
200 W Front Street  
Boise, ID 83702  
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[Buildings & Plants](#)



# Creating an Account



## Account Information

Please complete the following information to set up your account in Portfolio Manager.

☐ REQUIRED

\*Username:

Your password must be between 8 and 32 characters in length (letters and numbers only; no special characters)

\*Enter Password:

\*Re-Enter Password:

\*First Name:

\*Last Name:

\*E-mail:

Title:

Organization:

Address:

City:

State:

ZIP Code:

Country:

Phone:



# Creating an Account



Indicate your organization's annual activity for each commercial facility area:

*Manage/Upgrade:	<input type="text"/>	▼
*Own:	<input type="text"/>	▼
*Develop/Build:	<input type="text"/>	▼

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## (Optional) Master Account Feature (for [Sharing Facilities](#) )

By selecting the checkbox below, you will add your username and organization name to the Portfolio Manager Master Account registry. Master Accounts are intended to help users who need to track a large number of facilities managed by other Portfolio Manager users. Examples of appropriate use of the Master Account designation include:

- An association running an energy efficiency campaign might use a Master Account to track the progress of its members.
- A local or state government running an energy efficiency campaign might use a Master Account to track the progress of its constituents.
- A company or organization that is benchmarking a large number of facilities might create a Master Account to track the performance of its entire organizational portfolio.

By identifying your account as a "Master Account", your user and organization name will display for ALL Portfolio Manager users who wish to share facilities. Users who want to share facilities with you will be able to view and select your user and organization name during this process.

Those needing to share only a small number of buildings are encouraged to use Portfolio Manager's regular sharing feature and are asked NOT to set up a Master Account. [Learn more](#) about Master Accounts.

☐ Display my user and organization name to ALL Portfolio Manager users who wish to share facilities with my account.



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CANCEL SAVE PROFILE


# Editing an Account



[Home](#) > [My Portfolio](#) > Account Information

## Account Information

Please complete the following information to set up your account in Portfolio Manager.

 **REQUIRED**

\*Username: COOKBOOK2

If you wish to change your password, do so [here](#). Your new password must be between 8 and 32 characters in length (letters and numbers only; no special characters). Otherwise, leave these fields blank.

Enter Password:

Re-Enter Password:



# Accessing Your Account



PORTFOLIO MANAGER

Home



ACCOUNT  
INFORMATION



CONTACTS



Frequently  
Asked  
Questions



CONTACT  
US



HELP



LOGOUT

## Welcome to Portfolio Manager

[Access My Portfolio >](#)

☒ Skip this page on next login

You're in good company when you use EPA's Portfolio Manager to manage the energy performance of properties you own, manage, or hold for investment. Thousands of organizations have used Portfolio Manager to benchmark the energy performance of their buildings, track improvement, and apply for recognition from EPA:

- Top-performing buildings can earn the ENERGY STAR, the national symbol for protecting the environment through energy efficiency; and
- Organizations with building portfolios that show a 10%, 20%, 30% (or more) reduction in normalized energy use or achieve a 75 rating average, can earn ENERGY STAR Leaders recognition.

Portfolio Manager provides a secure environment for centralized and decentralized organizations to share facility-specific energy information, with features that allow you to group buildings, view average ratings across a group, control access to building data, and more.

Building Types eligible for energy performance rating include:

- Offices
- Bank/Financial Institutions
- Courthouses
- K-12 Schools
- Hospitals (Acute Care and Children's)
- Hotels
- Retail Stores
- Supermarkets
- Residence Halls/Dormitories
- Warehouses
- Medical Offices



### News and Announcements

#### ANNOUNCEMENT:

##### **\*Important Notice\* Portfolio Manager System Down Time**

Portfolio Manager will be UNAVAILABLE intermittently for maintenance on Saturday, March 1st, 2008.

#### Water Treatment and Distribution Facilities

The EPA is pleased to announce the addition of Water Treatment and Distribution Facilities to Portfolio Manager. Water Utilities will now be able to track and improve energy consumption and emissions by entering and managing data in Portfolio Manager.

[Learn More](#)

#### Portfolio Manager Enhancements (Spaces Not Eligible to Receive a Rating)

Portfolio Manager now provides users the ability to manage buildings that are eligible to receive a rating as well as those that are not – all within the same online platform. [Learn More](#)

#### Applying for the ENERGY STAR just got easier!

Portfolio Manager now allows you to apply for the ENERGY STAR for a single building or multiple buildings at once. [Learn More](#)



# Adding a Property

# Adding a Property



 **PORTFOLIO MANAGER**

 ACCOUNT INFORMATION  CONTACTS  FAQ FREQUENTLY ASKED QUESTIONS  CONTACT US  HELP  LOGOUT

[Home](#) > My Portfolio

Portfolio Averages	
Baseline Rating: 40 Facilities Included: 6	Current Rating: 14 Facilities Included: 7
Portfolio Adjusted Percent Energy Reduction: No Reduction Facilities Included: 9	
Averages are weighted by Total Floor Space. <a href="#">More about Baselines</a> <a href="#">More about Adjusted Percent Energy Reduction</a>	
Portfolio Averages (for all Water Utilities and Wastewater Treatment Facilities)	
Baseline Rating: 61 Facilities Included: 5	Current Rating: 61 Facilities Included: 5
Portfolio Adjusted Percent Energy Reduction: No Reduction Facilities Included: 5	
Averages are weighted by Average Daily Flow. <a href="#">More about Wastewater</a>	

[Add a Property](#)

## Work with Facilities

[Import](#) Facility Data Using Templates

[Update](#) Multiple Meters

[Share](#) Facilities

[Request](#) Energy Performance Report

## Apply for Recognition

[Apply](#) for the ENERGY STAR

[ENERGY STAR Leaders](#)

My Facilities

My Campuses

GROUP: All Facilities

[Create Group](#) | [View All](#)

VIEW: NADA VIEW

[Create View](#) | [Edit View](#) | [View All](#)

[Download](#) in Excel

Results 1 - 31 of 31

Search Facility Name:

Search

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

# Adding a Property



## Add a Property

### Property Type

What kind of property would you like to add?

- ☒ A single facility for which my organization owns or manages 90% or more of the floor area.
- ☐ A portion of a single facility for which my organization owns or manages less than 90% of the floor area.
- ☐ A hospital composed of a single facility or collection of facilities.
- ☐ A municipal wastewater treatment plant or water treatment and distribution utility
- ☐ A campus or other collection of multiple facilities at the same geographic location. [What is this?](#)

CANCEL

CONTINUE

# Adding a Property



[Home](#) > [My Portfolio](#) > Add General Facility Information

## Add General Facility Information

Use the form below to provide general information concerning your facility.

☒ **REQUIRED**

\*Type of Facility:

- ☒ A single facility for which my organization owns or manages 90% or more of the floor area.
- ☐ A portion of a single facility for which my organization owns or manages less than 90% of the floor area.
- ☐ A hospital composed of a single facility or collection of facilities.
- ☐ A municipal wastewater treatment plant or water treatment and distribution utility

Add this facility to a Campus:

Not in Campus

Date facility became part of a campus:  
(MM/DD/YYYY)

\*Country:

United States

\*Facility Name:

☐ Use Campus Address:

\*Address:





# Adding a Property



\*Country:

\*Facility Name:

☐ Use Campus Address:

\*Address:

\*City:

\*State:

County:

\*ZIP Code:

\*Year Built:

Select the Organization that owns this facility:

[Add/Edit Contacts and Organizations](#)

Select a primary Service and Product Provider for this facility:


[Add/Edit Contacts and Organizations](#)







CANCEL

SAVE

# Editing a Property



**PORTFOLIO MANAGER**

 ACCOUNT INFORMATION  CONTACTS  FAQ FREQUENTLY ASKED QUESTIONS  CONTACT US  HELP  LOGOUT

[Home](#) > [My Portfolio](#) > New Facility

**Facility Summary: New Facility**  
[How do I use this page?](#)

Building ID: 1393050  
Level of Access: Building Administrator

Electric Distribution Utility: Virginia Electric & Power Co  
Regional Power Grid: [SERC Virginia/Carolina](#)  
[Select my Power Generation Plant](#) to calculate my emissions rate  
Electric CO<sub>2</sub> Emissions Rate (lbs/MWh): 1146.386 ([what is this?](#))

**General Information** [Edit](#)

Address: 123 N. Main  
Arlington , VA 22209

Year Built: 1983

Property Type: Single Facility

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

**Eligibility for the ENERGY STAR**

N/A

[Generate a Statement of Energy Performance](#) for uses other than applying for the ENERGY STAR.

**Facility Performance** [Set Baseline Period](#) | [Set Energy Performance Target](#)

Select View:  [Create View](#) | [Edit View](#)

12 Months Ending	Baseline Site Electric Use (kWh (thousand Watt-hours))	Baseline Site Natural Gas Use (therms)	Current Site Electric Use (kWh (thousand Watt-hours))	Current Site Natural Gas Use (therms)	CO2 Reduced (pounds)	Energy Reduction (kBtu (thousand Btu))
Select Date <input type="text"/>						
Select Date <input type="text"/>						
Change						

REFRESH VIEW





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## Adding and Editing a Space

# Adding a Space



Electric Distribution Utility: Niagara Mohawk  
Regional Power Grid: [NJPCC Update NY](#)  
[Select my Power Generation Plant](#) to calculate my emissions rate  
Electric CO<sub>2</sub> Emissions Rate (lbs/MVh): 819.684 ([what's this?](#))

Property Type: Single Facility	
Baseline Rating: <a href="#">N/A</a>	Current Rating: <a href="#">N/A</a>
Eligibility for the ENERGY STAR	
N/A	

[Generate a Statement of Energy Performance](#) for uses other than applying for the ENERGY STAR.

Facility Performance <a href="#">Set Baseline Period</a>   <a href="#">Set Energy Performance Target</a>						
Select View: <a href="#">climate</a> <a href="#">Create View</a>   <a href="#">Edit View</a>						
12 Months Ending	Baseline Site Electric Use (kWh (thousand Watt-hours))	Baseline Site Natural Gas Use (therms)	Current Site Electric Use (kWh (thousand Watt-hours))	Current Site Natural Gas Use (therms)	CO2 Reduced (pounds)	Energy Reduction (kBtu (thousand Btu))
<a href="#">Select Date</a>						
<a href="#">Select Date</a>						
Change						
<a href="#">REFRESH VIEW</a>						

Space Use <a href="#">Add Space</a>					
Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	
No Space Defined					
Due to rounding, the % Floor Area Total may not always equal 100%.					

**General Facility Administration**  
[Track](#) Energy Performance Improvements  
[Delete](#) this Facility from Portfolio Inventory  
[Contact](#) us  
  
**Sharing Data**  
[Add](#) user to share this Facility  
[Modify](#) list of users  
[Transfer](#) Facility to another user  
[View](#) entire Access List for this Facility

Space Use <a href="#">Add Space</a>					
Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	
No Space Defined					

Due to rounding, the % Floor Area Total may not always equal 100%.



# Adding a Space



 **PORTFOLIO MANAGER**

 ACCOUNT INFORMATION  CONTACTS  FAQ FREQUENTLY ASKED QUESTIONS  CONTACT US  HELP  LOGOUT

[Home](#) > [My Portfolio](#) > [New Building](#) > Add a Facility Space

## Add a Facility Space

This facility must have at least one defined space and all defined space(s) must account for 100% of the facility's floor area combined. Define more than one space if:

- 1) A portion of the facility is unique (e.g., a restaurant within a building predominantly used as a hospital).
- 2) Usage patterns are unique (e.g., one tenant uses the facility much longer hours than others).

Note: If your space is not listed below, please select "Other." You will have an opportunity to further define this space on the following page. [More information about selecting space types](#)

☒ **REQUIRED**

**\*Enter a Name for this Space:**

**\*Select a Space Type:**

**\*Enter the Effective Date (MM/DD/YYYY) for this Space.**  
The Effective Date is used by Portfolio Manager to determine the starting date for including this Space's attributes in the overall calculation of the facility's energy performance rating:

CANCEL

CONTINUE

**Enter a Name for this Space:**

**Space Type:**   

Select a Space Type

Bank/Financial Institution  
Courtthouse  
Hotel/Motel  
K-12 School  
Medical Office  
Office  
Residence Hall/Dormitory  
Retail  
Supermarket/Grocery  
Warehouse and Storage  
Computer Data Center  
Other  
Parking  
Swimming Pool

**Effective Date:**   
The Effective Date is used by Portfolio Manager to determine the starting date for including this Space's attributes in the overall calculation of the facility's energy performance rating:

# Adding a Space



**PORTFOLIO MANAGER**

Home > My Portfolio > New Building > Add Office Space

**Add Office Space: My Office**

Please provide values for each required attribute below. Values for optional attributes can also be provided, but they will not be used to generate an Energy Performance Rating. If the value you are providing is a temporary value, select the "For Temporary Use" checkbox. Once the actual value is known, deselect this checkbox and provide the actual value. Facilities with temporary values may still apply for the ENERGY STAR.

If you wish for Portfolio Manager to provide default values, select the "Use Default Checkboxes" for that attribute. Facilities that use default values cannot apply for the ENERGY STAR.

☒ **REQUIRED**

Space Name:

Space Attribute	Space Attribute Value (Temporary values should only be used if an Actual value is not currently known) <small>What is this?</small>	Use Default Value	Units	Effective Date (when this Attribute Value was first true) <small>What is this?</small> (MM/DD/YYYY)
*Gross Floor Area	<input type="text"/> <input type="checkbox"/> For Temporary Use?	N/A	Sq. Ft. <input type="text" value=""/>	<input type="text" value="01/01/1983"/>
*Operating Hours/Week	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	Hours <input type="text" value=""/>	<input type="text" value="01/01/1983"/>
*Workers on Main Shift	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="01/01/1983"/>
*Number of PCs	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="01/01/1983"/>
*What percent of this space is air-conditioned?	Select <input type="text" value=""/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="01/01/1983"/>
*What percent of this space is heated?	Select <input type="text" value=""/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="01/01/1983"/>

Space Name:

*Required for Benchmarking <small>What is this?</small>				
Space Attribute	Space Attribute Value (Temporary values should only be used if an Actual value is not currently known) <small>What is this?</small>	Use Default Value	Units	Effective Date (when this Attribute Value was first true) <small>What is this?</small> (MM/DD/YYYY)
*Gross Floor Area	<input type="text"/> <input type="checkbox"/> For Temporary Use?	N/A	Sq. Ft. <input type="text" value=""/>	<input type="text" value="01/01/1889"/>
*Weekly operating hours	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	Hours <input type="text" value=""/>	<input type="text" value="01/01/1889"/>
*Workers on Main Shift	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="01/01/1889"/>
*Number of PCs	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="01/01/1889"/>
*What percent of this space is air-conditioned?	Select <input type="text" value=""/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="01/01/1889"/>
*What percent of this space is heated?	Select <input type="text" value=""/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="01/01/1889"/>



# Editing a Space




Space Use <a href="#">Add Space</a>					
Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	
<a href="#">My Office</a>	Office	100,000	100		<a href="#">Delete Space</a>
Total		100,000	100 %		
More than 50% of your building is defined as Office. This building cannot be rated. You will be compared to the national average of Office. <a href="#">Click to learn more.</a>					

# Editing a Space



## Edit Office Space: My Office

To edit a space attribute, please select the "Edit" link at the far right of each row.

 REQUIRED

\*Space Name:

CANCEL

SAVE

### Current Space Attribute Values [What is this?](#)

Space Attribute	Space Attribute Value (Temporary values should only be used if an Actual value is not currently known) <a href="#">What is this?</a>	Use Default Value	Units	Effective Date (when this Attribute Value was first true) <a href="#">What is this?</a> (MM/DD/YYYY)	Last Updated By
Gross Floor Area (required for benchmarking)	100000.0000	N/A	Sq. Ft.	01/01/1983	COOKBOOK2 <a href="#">Edit</a>
Operating Hours/Week (required for benchmarking)	65.0000		Hours	01/01/1983	COOKBOOK2 <a href="#">Edit</a>
Workers on Main Shift (required for benchmarking)	20.0000			01/01/1983	COOKBOOK2 <a href="#">Edit</a>
Number of PCs (required for benchmarking)	20.0000			01/01/1983	COOKBOOK2 <a href="#">Edit</a>
What percent of this space is air-conditioned? (required for benchmarking)	50% or more			01/01/1983	COOKBOOK2 <a href="#">Edit</a>
What percent of this space is heated? (required for benchmarking)	50% or more			01/01/1983	COOKBOOK2 <a href="#">Edit</a>





# Editing a Space



[Home](#) > [My Portfolio](#) > [WA Test Office](#) > Edit Office Space Attribute

## Edit Office Space Attribute: Test Office

Please provide a value for the attribute below. If the value you are providing is a temporary value, select the "For Temporary Use?" checkbox. Once the actual value is known, deselect this checkbox and provide the actual value. Facilities with temporary values may still apply for the ENERGY STAR.

Do you want to update this attribute value with new data, or correct data mistakes?

Use this option if the attribute's value has changed recently.

☐ **Update:** This attribute changed recently.

Use this option if you entered an incorrect value by mistake and need to correct it.

☐ **Correct:** This attribute was entered in error.

Space Attribute	* Space Attribute Value (Temporary values should only be used if an Actual value is not currently known) <a href="#">What is this?</a>	Use Default Value	Units	* Effective Date (when this Attribute Value was first true) <a href="#">What is this?</a> (MM/DD/YYYY)
Gross Floor Area (required for benchmarking)	50000 <input type="checkbox"/> For Temporary Use?	N/A	Sq. Ft. ▾	01/01/1959

CANCEL

SAVE



---

## Adding and Editing Energy Meters

# Adding Energy Meters



**PORTFOLIO MANAGER**

[Home](#) > [My Portfolio](#) > New Building

**Facility Summary: New Building**  
[View as List](#) [View as Map](#)

Building ID: 1393832  
Level of Access: Building Administrator

Electric Distribution Utility: Niagara Mohawk  
Regional Power Grid: [NRC Update NY](#)  
Select my Power Generation Plant to calculate my emissions rate  
Electric CO<sub>2</sub> Emissions Rate (lb/MWh): 319.884 [View as List](#)

**General Information**

Address: 123 Main St  
Yountown, VA 12345

Year Built: 1983

Property Type: Single Facility

Baseline Rating: [N/A](#) | Current Rating: [N/A](#)

Eligibility for the ENERGY STAR

N/A

[Generate a Statement of Energy Performance](#) for uses other than applying for the ENERGY STAR.

**Facility Performance** | [Set Baseline Period](#) | [Set Energy Performance Target](#)

Select View: [Climate](#)

12 Months Ending	Baseline Site Electric Use (kWh (thousand Watt-hours))	Baseline Site Natural Gas Use (therms)	Current Site Electric Use (kWh (thousand Watt-hours))	Current Site Natural Gas Use (therms)	CO <sub>2</sub> Reduced (pounds)	Energy Reduction (kBtu (thousand Btu))
<a href="#">Select Date</a>						
<a href="#">Select Date</a>						
<a href="#">Change</a>						
<a href="#">REFRESH VIEW</a>						

**Space Use** | [Add Space](#)

Space Name	Space Type	Floor Area (Sq. Ft.)	%Floor Area	Alerts
No Space Defined				

Due to rounding, the % Floor Area Total may not always equal 100%.

**Energy Meters** | [Add Meter](#) | [Update Multiple Meters](#) | [View All Meter Data in Excel](#)

Meter Name	Energy Type	Space(s)	Last Meter Entry (End Date)	Alerts
No Meter Defined				

**General Facility Administration**

[Tags](#) | [Energy Performance Improvements](#) | [Delete this Facility from Portfolio Manager](#) | [Contact Us](#)

**Sharing Data**

[App](#) | [User](#) | [List of Users](#) | [Add User](#) | [Facility to another user](#) | [Remove Access List for this Facility](#)

**Applying for the ENERGY STAR**

[Apply for the ENERGY STAR](#) | [View Status of ENERGY STAR Applications](#)

**Building Profiles**

[Building Profile](#) can be created when an ENERGY STAR label application is submitted.



**Energy Meters** | [Add Meter](#) | [Update Multiple Meters](#) | [View All Meter Data in Excel](#)

Meter Name	Energy Type	Space(s)	Last Meter Entry (End Date)	Alerts
No Meter Defined				

# Adding Energy Meters



**Add Energy Meter**

\*Enter the Meter Name:

\*Apply this meter to the following (check all that apply):

☒ Tire facility  
☐ Office

Select the Meter Type:

\*Energy Type:

\*Units:

\*Add this Meter to Total Facility Energy Use?

☒ Yes, calculate this facility's total energy use by including this meter  
☐ No, adding this meter to this facility's total energy use will inflate the actual value

Is this meter currently active?  
☒ Yes ☐ No

\*Will an Energy Service Provider provide data for this meter through Automated Benchmarking Services? ([what is this?](#))  
☒ Yes ☐ No

\*Select the Energy Service Provider:

What is the meter ID given by the Energy Service Provider?  
(Please contact the Energy Service Provider for further instructions)

**Temporary Energy Data**

\* Are temporary values being used for energy data? ([what is this?](#))  
☐ Yes  
☒ No

Temporary values for meter readings used from to

**Select an Energy Type**

- Electricity
- Natural Gas
- Fuel Oil (No. 2)
- District Steam
- District Chilled Water - Electric-Driven Chiller
- District Chilled Water - Absorption Chiller using Natural Gas
- District Chilled Water - Engine-Driven Chiller using Natural Gas
- Wood
- Propane
- Liquid Propane
- Other
- Kerosene
- Fuel Oil (No. 1)
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Diesel (No. 2)
- Coal (anthracite)
- Coal (bituminous)
- Coke

**Select Units**

- ccf (hundred cubic feet)
- cf (cubic feet)
- Gallons
- kBtu (thousand Btu)
- kcf (thousand cubic feet)
- KLbs. (thousand pounds)
- kWh (thousand Watt-hours)
- MBtu (million Btu)
- MCF (million cubic feet)
- MLbs. (million pounds)
- MWh (million Watt-hours)
- pounds
- therms
- ton hours
- tons

# Adding Energy Meters



PORTFOLIO MANAGER

ACCOUNT INFORMATION

CONTACTS

FAQ FREQUENTLY ASKED QUESTIONS

CONTACT US


HELP


LOGOUT

[Home](#) > [My Portfolio](#) > [New Building](#) > Add Meter Entries

## Add Meter Entries: E1

Please select the number of meter entries to add and enter the start date for these meter entries.

 REQUIRED

Select Number of Meter Entries to be added and Start Date for first entry:			
Meter Entries to Add	* Start Date (MM/DD/YYYY)	Energy Type	Units
12  Month(s)	<input type="text"/>	Electricity	kWh (thousand Watt-hours)

CANCEL

CONTINUE

# Entering Energy Use



 **PORTFOLIO MANAGER**

 ACCOUNT INFORMATION  CONTACTS  FREQUENTLY ASKED QUESTIONS  CONTACT US  HELP  LOGOUT

[Home](#) > [My Portfolio](#) > [New Building](#) > Enter Energy Use

## Enter Energy Use: E1

Please enter the energy use for each meter entry below. Portfolio Manager requires that entries are for consecutive time periods; only one day of overlap or one day of gap can exist between meter entries to be eligible to generate an Energy Performance Rating.

If you are accounting for "sold" energy, indicate this by entering a negative energy use for the appropriate time period.

### Meter Information

Fuel Type: Electricity (kWh (thousand Watt-hours))  
Space(s): Entire Facility

### Add Energy Use:

Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Energy Use (kWh (thousand Watt-hours))	Cost - US Dollars (optional)
<input type="text" value="10/29/2008"/>	<input type="text" value="11/28/2008"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="11/29/2008"/>	<input type="text" value="12/28/2008"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="12/29/2008"/>	<input type="text" value="01/28/2007"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="01/29/2007"/>	<input type="text" value="02/28/2007"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="03/01/2007"/>	<input type="text" value="03/28/2007"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="03/29/2007"/>	<input type="text" value="04/28/2007"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="04/29/2007"/>	<input type="text" value="05/28/2007"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="05/29/2007"/>	<input type="text" value="06/28/2007"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="06/29/2007"/>	<input type="text" value="07/28/2007"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="07/29/2007"/>	<input type="text" value="08/28/2007"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="08/29/2007"/>	<input type="text" value="09/28/2007"/>	<input type="text"/>	\$ <input type="text"/>
<input type="text" value="09/29/2007"/>	<input type="text" value="10/28/2007"/>	<input type="text"/>	\$ <input type="text"/>

CANCEL

SAVE



# Editing Energy Meters



Energy Meters <a href="#">Add Meter</a>   <a href="#">Update Multiple Meters</a>   <a href="#">View All Meter Data in Excel</a>					
Meter Name	Energy Type	Space(s)	Last Meter Entry (End Date)	Alerts	
<a href="#">Meter 1</a>	Electricity (kWh (thousand Watt-hours))	My Office	12/31/2005	Data > 120 days old. Less than one year of data. <a href="#">more</a>	<a href="#">Delete Meter</a>

# Editing Energy Meters



 **PORTFOLIO MANAGER**

 ACCOUNT INFORMATION  CONTACTS  FAQ FREQUENTLY ASKED QUESTIONS  CONTACT US  HELP  LOGOUT

[Home](#) > [My Portfolio](#) > [New Building](#) > [Edit Energy Use](#)

## Edit Energy Use: E1

Please enter the energy use for each meter entry below. Portfolio Manager requires that entries are for consecutive time periods; only one day of overlap or one day of gap can exist between meter entries to be eligible to generate an Energy Performance Rating.

If you are accounting for "sold" energy, indicate this by entering a negative energy use for the appropriate time period.

### Meter Information [Edit](#)

Fuel Type: Electricity (kWh (thousand Watt-hours))  
Space(s): Entire Facility

[Download Meter Data in Excel](#)

### Edit Energy Use:

[Add Meter Entries](#)

Remove Entry	Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Energy Use (kWh (thousand Watt-hours))	Cost - US Dollars (optional)	Last Updated By
<input type="checkbox"/>	03/01/2007	03/28/2007	2000.00	\$ 100	COOKBOOK2
<input type="checkbox"/>	01/29/2007	02/28/2007	1000.00	\$ 50.00	COOKBOOK2
<input type="checkbox"/>	12/29/2006	01/28/2007	2500.00	\$ 125.00	COOKBOOK2
<input type="checkbox"/>	11/29/2006	12/28/2006	2000.00	\$ 100.00	COOKBOOK2
<input type="checkbox"/>	10/29/2006	11/28/2006	1000.00	\$ 50.00	COOKBOOK2

[CANCEL](#) [SAVE](#)





# Adding Meter Entries



PORTFOLIO MANAGER



ACCOUNT  
INFORMATION



CONTACTS



FREQUENTLY  
ASKED  
QUESTIONS



CONTACT  
US



HELP



LOGOUT

[Home](#) > [My Portfolio](#) > [HED Focus Test](#) > [Edit Energy Use](#)

## Edit Energy Use: 1345678912-E

Please enter the energy use for each meter entry below. Portfolio Manager requires that entries are for consecutive time periods; only one day of overlap or one day of gap can exist between meter entries to be eligible to generate an Energy Performance Rating.

If you are accounting for "sold" energy, indicate this by entering a negative energy use for the appropriate time period.

### Meter Information [Edit](#)

Fuel Type: Electricity (kWh (thousand Watt-hours))

Space(s): Entire Facility

[Download Meter Data in Excel](#)

### Edit Energy Use:

[Add Meter Entries](#)

Remove Entry	Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Energy Use (kWh (thousand Watt-hours))	Cost - US Dollars (optional)	Last Updated
<input type="checkbox"/>	03/16/2008	04/15/2008	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	02/16/2008	03/15/2008	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	01/16/2008	02/15/2008	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	12/16/2007	01/15/2008	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	11/16/2007	12/15/2007	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	10/16/2007	11/15/2007	80000.00	\$ 6000	08/27/2008 by COOKBOOK2



# Removing Data



[Download Meter Data in Excel](#)

Edit Energy Use:

[Add Meter Entries](#)


Remove Entry	Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Energy Use (kWh (thousand Watt-hours))	Cost - US Dollars (optional)	Last Updated
<input checked="" type="checkbox"/>	03/16/2008	04/15/2008	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	02/16/2008	03/15/2008	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input checked="" type="checkbox"/>	01/16/2008	02/15/2008	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input checked="" type="checkbox"/>	12/16/2007	01/15/2008	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	11/16/2007	12/15/2007	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	10/16/2007	11/15/2007	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input checked="" type="checkbox"/>	09/16/2007	10/15/2007	80000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	08/16/2007	09/15/2007	70000.00	\$ 6000	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	07/16/2007	08/15/2007	70000.00	\$	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	06/16/2007	07/15/2007	70000.00	\$	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	05/16/2007	06/15/2007	70000.00	\$	08/27/2008 by COOKBOOK2
<input type="checkbox"/>	04/16/2007	05/15/2007	70000.00	\$	08/27/2008 by COOKBOOK2







CANCEL

SAVE

# Example



 **PORTFOLIO MANAGER**

 ACCOUNT INFORMATION  CONTACTS  FREQUENTLY ASKED QUESTIONS  CONTACT US  HELP  LOGOUT

[Home](#) > [My Portfolio](#) > Courthouse Test

## Facility Summary: Courthouse Test

[How do I use this page?](#)

Building ID: 1416155

Level of Access: Building Data Administrator

Electric Distribution Utility: Virginia Electric & Power Co ([change](#))

Regional Power Grid: [SERC Virginia/Carolina](#)

[Select my Power Generation Plant](#) to calculate my emissions rate

Electric CO<sub>2</sub> Emissions Rate (lbs/MWh): 1146.386 ([what is this?](#))

### General Information [Edit](#)

#### Address:

Herndon, VA 20120

**Year Built:** 2005

**Property Type:** Single Facility

**Baseline Rating:** 88

**Current Rating:** 88

#### Eligibility for the ENERGY STAR

Eligible to [Apply for the ENERGY STAR](#)

[Generate a Statement of Energy Performance](#) for uses other than applying for the ENERGY STAR.

### Facility Performance [Set Baseline Period](#) | [Set Energy Performance Target](#)

Select View: Summary: Energy Use [Create View](#) | [Edit View](#)

12 Months Ending	Current Rating (1-100)	Current Site Energy Intensity (kBtu/Sq. Ft.)	Current Source Energy Intensity (kBtu/Sq. Ft.)	Energy Reduction per Sq. Ft. (kBtu/Sq. Ft.)	Adjusted Energy Reduction per Sq. Ft. (kBtu/Sq. Ft.)	Energy Use Alerts
December 2007 (Current)	88	50.3	117.5	1.3	0.8	
August 2007 (Baseline)	88	51.7	119.2	No Savings	No Savings	
Change	0	1.4	1.7	-1.3		

REFRESH VIEW












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# Sharing Facilities

# Sharing Facilities with Another User, Master Account, or SPP



**PORTFOLIO MANAGER**

 ACCOUNT INFORMATION  CONTACTS  FAQ FREQUENTLY ASKED QUESTIONS  CONTACT US  HELP  LOGOUT

[Home](#) > **My Portfolio**

Portfolio Averages	
<b>Baseline Rating: 100</b> Facilities Included: 1	<b>Current Rating: 100</b> Facilities Included: 2
<b>Portfolio Adjusted Percent Energy Reduction: 0%</b> Facilities Included: 1	
Averages are weighted by Total Floor Space. <a href="#">More about Baselines</a> <a href="#">More about Adjusted Percent Energy Reduction</a>	

[Add](#) a Property

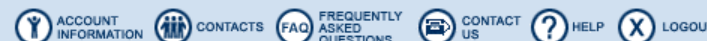
**Work with Facilities**  
[Import](#) Facility Data Using Templates  
[Update](#) Multiple Meters  
**[Share](#) Facilities**  
[Request](#) Energy Performance Report

**Apply for Recognition**  
[Apply](#) for the ENERGY STAR  
[ENERGY STAR Leaders](#)

# Sharing Facilities with Another User, Master Account, or SPP



## PORTFOLIO MANAGER



[Home](#) > [My Portfolio](#) > [Share Facilities \(Step 1\)](#)

### Select User or Master Account

Users with whom you share facilities will now be able to see your name and e-mail address on their Facility Summary page for that shared facility. In addition, users will also have the option to select your name and email address to appear in their custom views. Select Cancel if you do not wish to share any facilities.

Portfolio Manager provides the ability to share multiple facilities from your account with other users of the system in a single transaction. Users with whom access is being shared or removed MUST have a Portfolio Manager user account. To share facilities, select a Portfolio Manager user in Step 1.

If you are only removing access to facilities in your account, select "Remove this User's Access" in Step 1 after selecting a user from the Current Access List or enter a username in the textbox. You will then be able to select all of the facilities from which you want to remove this user's access.

#### STEP 1: Select the account to which you want to grant access, modify existing access or remove access rights.

Portfolio Manager User:

User from my current access list:

- OR -

Enter Portfolio Manager Username:

- OR -




Select a Portfolio Manager Master Account:



# Sharing Facilities with Another User, Master Account, or SPP



**PORTFOLIO MANAGER**

 ACCOUNT INFORMATION  CONTACTS  FREQUENTLY ASKED QUESTIONS  CONTACT US  HELP  LOGOUT

[Home](#) > [My Portfolio](#) > Share Facilities (Steps 2 and 3)

## Select Access Rights for State of H Clean Energy

**STEP 2: Select the set of Access Rights you want to provide this User.**

Access Role	Access Rights
<input checked="" type="radio"/> Facility/Profile Editor	(1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; (4) Create/Edit a Building Profile
<input type="radio"/> Facility Editor	1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; May NOT create/edit a Building Profile
<input type="radio"/> Profile Editor	1) Create/Edit a Building Profile; May NOT edit any other data for this facility, generate a Statement of Energy Performance or submit an ENERGY STAR Building Application
<input type="radio"/> Read Only	Read Access only; May NOT edit any data for this facility, generate a Statement of Energy Performance, submit an ENERGY STAR Building Application or create/edit a Building Profile

**Optional Rights (rights that are added to the selected access role)**

Can this user set a baseline for the shared facilities? ☒ Yes ☐ No  
(Note: There is only one baseline date per facility.)

Can this user provide access to the shared facilities with other users? ☐ Yes ☒ No  
(Note: A user cannot delegate any access role greater than their own. See table above. All users who are given this right will be able to assign this right to other users.)

Can this user delete the shared facilities from your account? ☐ Yes ☒ No  
(Note: This right is reserved only for Facility/Profile Editors or Facility Editors.)


**STEP 3: Specify the group from this user's account to place the shared facility(ies).** [Learn more](#) about sharing into groups.

Main Portfolio ▼

CANCEL CONTINUE

# Sharing Facilities with Another User, Master Account, or SPP



**PORTFOLIO MANAGER**

ACCOUNT INFORMATIONCONTACTSFAQFREQUENTLY ASKED QUESTIONSCONTACT US?HELPXLOGOUT

Home > My Portfolio > Share Facilities (Step 1) > Share Facilities (Steps 2 and 3) > Share Facilities (Step 4)

### Select Facilities to Share with State of H Clean Energy

Select all facilities for which you would like to provide this user with access. To remove access, uncheck the checkbox next to that facility. Note: you will only be able to share facilities that you currently have access to share.

The access role and rights you selected in Step 2 are:

Access Role: **Facility/Profile Editor**  
Able to Set Baseline? **Yes**  
Able to Delegate Access? **No**  
Able to Delete Facility? **No**  
Accessible to User through: **Main Portfolio**

The "Current Access Level" columns allow you to see whether this user has already been provided access to this facility by you or another user. If you choose to change the access role here, your selection will replace the current access role.

If the access role or optional rights for a particular facility listed below in the "New Access Level" columns do not match those listed above, you do not have access to share that facility at the level you have chosen in Step 2. You can either choose to select the recommended access role/rights listed in the "New Access Level" columns below or provide a different level of access to that user at a later date.

**STEP 4: Select all facilities in your account that you would like to share with State of H Clean Energy.**

Select Facilities to Share (uncheck to Remove Access)	Facility Name	Current Access Level		New Access Level	
		Access Role (provided by)	Optional Rights	Access Role	Optional Rights
<input type="checkbox"/> select all					
<input type="checkbox"/>	Corbin's School	None	None	Facility/Profile Editor	Set Baseline? Yes Delegate? No Delete? No
<input type="checkbox"/>	Sample Facility	None	None	Facility/Profile Editor	Set Baseline? Yes Delegate? No Delete? No


CANCELCONTINUE





# Sharing Facilities with Another User, Master Account, or SPP



 **PORTFOLIO MANAGER**

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US ? HELP X LOGOUT

[Home](#) > [My Portfolio](#) > [Share Facilities \(Steps 1 and 2\)](#) > [Share Facilities \(Step 3\)](#) > [Share Facilities \(Step 4\)](#)

## Confirmation


You have identified the following facility access changes for **State of H Clean Energy**. Please review these selections below. If you want to proceed with making these changes for this user, select "Save." The user will receive an e-mail confirming this change has been made to their account (along with a copy to you). Select "Cancel" to return to Step 4 to make any needed adjustments.

**STEP 5: Confirm that all access changes are correct**

Access Provided to: **State of H Clean Energy**  
Accessible to User through: **Main Portfolio**

Access Role: **Facility/Profile Editor**   Able to Set Baseline? **Yes**   Able to Delegate Access? **No**   Able to Delete Facility? **No**

Facilities where Access is being granted	Facilities where Current Access Role/Rights are being changed	Facilities where Access is being removed
Sample Facility		

 **PORTFOLIO MANAGER**

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US ? HELP X LOGOUT

[Home](#) > [My Portfolio](#) > [Notification](#)

## Notification

An e-mail has been sent to State of H Clean Energy indicating facilities have been shared. You will be notified by e-mail if State of H Clean Energy accepts or rejects the facilities you shared.





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# The Campus Feature of EPA's Portfolio Manager

# Portfolio Manager's Campus Feature

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- Get started at [www.energystar.gov/benchmark](http://www.energystar.gov/benchmark)
- Provides a central view of all campus facilities
- Calculates combined energy usage based on combined floor space
- Energy usage can be derived from both campus-level meters (used by multiple facilities) and separate meters for individual facilities

# Process for Creating Campuses

---



- Add a property (individual buildings, campus, etc.)
- Add space types
- Add utility meters
- Create a campus
- Add meter associations

# Create a Campus



1) Add a Property:  
From the My  
Portfolio page, click  
Add a Property.

**PORTFOLIO MANAGER**

[Home](#) > My Portfolio

**Group Averages**

Baseline Rating: N/A Facilities Included: 0	Current Rating: N/A Facilities Included: 0
Group Adjusted Percent Energy Reduction: No Reduction Facilities Included: 5	
Averages are weighted by Total Floor Space. <a href="#">More about Baselines</a> <a href="#">More about Adjusted Percent Energy Reduction</a>	

[Add a Property](#)

**Work with Facilities**

- [Share](#) Facilities
- [Update](#) Multiple Meters
- [Request](#) Energy Performance Report

**Apply for Recognition**

[ENERGY STAR Leaders](#)

**My Facilities** **My Campuses**

**GROUP:** Campus: Test Campus [Create Group](#) | [Edit Group](#) | [View All](#)

**VIEW:** MyView [Create View](#) | [Edit View](#) | [View All](#)

[Download](#) in Excel

Results 1 - 6 of 6

Search Facility Name:  [Search](#)

All # A B C D **E** F G H I J K L M N O P Q R S T U V W X Y Z

Facility Name	Current Site Energy Intensity (kBtu/Sq. Ft.)	Current Rating (1-100)	Baseline Site Energy Intensity (kBtu/Sq. Ft.)	Target Rating (1-100)	Energy Reduction (kBtu (thousand Btu))	Energy Reduction per Sq. Ft. (kBtu/Sq. Ft.)
<a href="#">EPA Classroom Residence Hall</a>	2.6	N/A	0.0	N/A	No Savings	No Savings



# Add a Property



1) Select the last option: A campus or other collection of multiple facilities at the same geographic location.

2) Click the Continue button. The Add General Campus Information page will open.



## Add a Property

**Property Type**

What kind of property would you like to add?

- ☐ A single facility for which my organization owns or manages 90% or more of the floor area.
- ☐ A portion of a single facility for which my organization owns or manages less than 90% of the floor area.
- ☐ A hospital composed of a single facility or collection of facilities.
- ☐ A municipal wastewater treatment plant or water treatment and distribution utility
- ☐ A campus or other collection of multiple facilities at the same geographic location. [What is this?](#)

CANCEL CONTINUE

# Add General Campus Information



1) Complete the form by selecting a campus type and entering full address information.

2) Click Continue.

If the campus type is not Higher Education/University, the Add Campus Facilities screen will open (skip to Slide 6).

A screenshot of the Energy Star Portfolio Manager web application. The header includes the Energy Star logo, "PORTFOLIO MANAGER", and links for "ACCOUNT INFORMATION", "CONTACTS", and "FREQUENTLY ASKED QUESTIONS". The breadcrumb trail shows "Home > My Portfolio > Add A Campus". The main heading is "Add General Campus Information". Below it, a note says "Use the form below to provide general information concerning your campus." A red star icon and the word "REQUIRED" are shown. The form fields are: "\*Campus Type:" with a dropdown menu showing "Select a Campus Type", "Higher Education/University" (highlighted), "Office Park", "Other", and "Retail Campus/Strip Mall"; a link "what is this?"; "\*Country:" with a dropdown; "\*Name:" with a text input; "\*Address:" with two stacked text inputs; "\*City:" with a text input; "\*State:" with a dropdown showing "Select a State"; and "\*Zip Code:" with a text input. At the bottom are "CANCEL" and "CONTINUE" buttons. A large red bracket on the right side of the form, spanning from the "Campus Type" dropdown down to the "CONTINUE" button, is labeled with a large red "1)" and "2)".



# Add General Campus Information



1) Enter attribute values and effective dates (attribute data is optional, and there are no default values).

2) Click Continue.

**PORTFOLIO MANAGER** ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US ? HELP X

[Home](#) > [My Portfolio](#) > [Test University Campus](#) > Add Campus Attributes

## Add Higher Education/University Campus Attributes: Test University Campus

Enter general attributes about the campus.

Add Campus Attributes (Optional)			
Campus Attribute	Value	Units	Effective Date (when this Attribute Value was first true) <a href="#">What is this?</a> (MM/DD/YYYY)
Enrollment	<input type="text"/>	Students	<input type="text"/>
Grant Dollars	<input type="text"/>	US Dollars (\$)	<input type="text"/>
Number of Employees	<input type="text"/>		<input type="text"/>

**CANCEL CONTINUE**



# Add Campus Facilities








1) Check the facilities to be associated with this campus, and enter the date the facilities became part of the campus.

2) Click Continue (not shown here).

Note: You can continue without any facilities selected and choose to add facilities later. If facilities were selected, and if the facilities have energy or water meters, the “Add Campus Facilities: Add Meter Associations” page displays.



1)

**PORTFOLIO MANAGER**  ACCOUNT INFORMATION  CONTACTS  FAQ FREQUENTLY ASKED QUESTIONS  CONTACT US

[Home](#) > [My Portfolio](#) > [Test University Campus](#) > Add Campus Facilities

## Add Campus Facilities: Test University Campus

Select Facilities

From the list of available facilities below, please select all facilities that will be added to this campus. (that are part of another campus are not eligible.)

[Add New Facility](#)

Select all Facilities that are part of your campus:					
<input type="checkbox"/>	Date Facility Became Part of Campus	Facility Name	Address	Total Floor Space (Sq. Ft.)	Building Type
<input type="checkbox"/>	<input type="text"/>	ABC Courthouse	123 Justice St. Sample, IL 12345	100000	
<input type="checkbox"/>	<input type="text"/>	ABC K-12 School	123 Children Dr. Sample, IL 12345	100000	K-12 School
<input checked="" type="checkbox"/>	<input type="text"/>	ABC Residence Hall	123 University Dr.	0	

# Add Campus Meter Associations








1) Indicate which facility meters should be added to the campus total.

NOTE: **Yes** should be selected if the facility is on a separate meter, and the meter should be added to the campus total in order to generate accurate energy usage for the entire campus. **No** should be selected if the facility is sub-metered and the energy usage is duplicative of a campus-wide energy meter.

2) Click Save.



**PORTFOLIO MANAGER**  ACCOUNT INFORMATION  CONTACTS  FAQ FREQUENTLY ASKED QUESTIONS  CONTACT US

[Home](#) > [My Portfolio](#) > [Test University Campus](#) > [Add Campus Facilities](#) > [Add Meter Association](#)

## Add Campus Facilities: Test University Campus

### Add Meter Associations

You have indicated that the following facilities should be added to the campus. Please indicate:  
1) Which Campus-level meters (if any) each new facility should be associated with, and  
2) Which Facility-level meters (if any) should be added to the Campus total.

Add Facility Meters To Campus Totals		
Facility Name	Facility Meters	Add To Campus Total?
My Buildings 1	Elec1	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
	NGas1	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
My Office Building	Electir1	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
Office Sample #1	12	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
	one	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
Other Test Space	Electric-1	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No

**2)**

# Campus Summary Page



This page is an executive summary of all energy performance-related data for a campus. The page displays the following:

1) **General Information:** Displays Campus Type, address, and Percent Energy Reduction calculation. Also provides an Edit link to Edit General Campus Information.

2) **Campus Performance:** Compares campus data from two different time periods.



**PORTFOLIO MANAGER** ACCOUNT INFORMATION CONTACTS FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

[Home](#) > [My Portfolio](#) > Test University Campus

### Campus Summary: Test University Campus

[How do I use this page?](#)

Campus ID: 821  
Level of Access: Building Data Administrator

Electric Distribution Utility: Potomac Electric Power Co  
Regional Power Grid: [RFC East](#)  
[Select my Power Generation Plant](#) to calculate my emissions rate  
Electric CO<sub>2</sub> Emissions Rate (lbs/MWh): 1095.533 ([what is this?](#))

**General Information** [Edit](#)

Campus Type: Higher Education/University  
123 College St  
Washington, DC 20037

**Campus Percent Energy Reduction:**  
No Reduction

**Campus Performance** [Set Baseline Period](#)

Select View:

12 Months Ending	Current Site Energy Intensity (kBtu/Sq. Ft.)	Current Rating (1-100)	Baseline Site Energy Intensity (kBtu/Sq. Ft.)	Target Rating (1-100)	Energy Reduction (kBtu (thousand Btu))	Energy Reduction per Sq. Ft. (kBtu/Sq. Ft.)
May 2005	1.3	N/A	0.0	N/A	N/A	N/A
May 2004	19.9	N/A	0.0	N/A	N/A	N/A
Change	-18.6		0.0			

[REFRESH VIEW](#)



# Campus Summary Page (continued)

Higher Education/University Campus Attributes (Optional)			
Attribute	Value	Units	Effective Date
<a href="#">Enrollment</a>	10000	Students	01/01/2000
<a href="#">Grant Dollars</a>		US Dollars (\$)	
<a href="#">Number of Employees</a>	3000		01/01/2000

1)

## General Campus Administration

[View](#) Campus Facilities  
[Add](#) Campus Facilities  
[Remove](#) Campus Facilities  
[Delete](#) Campus  
[Contact Us](#)

## Sharing Data

[Share](#) this campus with another user  
[Modify](#) user permissions  
[Transfer](#) this campus to another user

Campus Energy Meters <a href="#">Add Meter</a>   <a href="#">View All Meter Data in Excel</a>			
Meter Name	Energy Type	Last Meter Entry (End Date)	Alerts
No Meters Defined			

2)

Campus Water Meters <a href="#">Add Meter</a>   <a href="#">View All Meter Data in Excel</a>				
Meter Name	Units	Use	Last Meter Entry (End Date)	Alerts
No Meters Defined				

2) Utility Meters: This is a summary of data related to the energy use of the facility. From these sections you can Edit Campus Energy Meters, Edit Campus Water Meters, delete meters, or view all meter data in Excel.



1) Campus Attributes: This section only displays if the Campus Type is Higher Education/University and displays current values.

Click on an attribute to go to the Edit Higher Education/University Attributes page.



# Campus Summary Page (continued)



Higher Education/University Campus Attributes (Optional)			
Attribute	Value	Units	Effective Date
<a href="#">Enrollment</a>	10000	Students	01/01/2000
<a href="#">Grant Dollars</a>		US Dollars (\$)	
<a href="#">Number of Employees</a>	3000		01/01/2000

## General Campus Administration

[View](#) Campus Facilities  
[Add](#) Campus Facilities  
[Remove](#) Campus Facilities  
[Delete](#) Campus  
[Contact Us](#)

## Sharing Data

[Share](#) this campus with another user  
[Modify](#) user permissions  
[Transfer](#) this campus to another user

Campus Energy Meters <a href="#">Add Meter</a>   <a href="#">View All Meter Data in Excel</a>			
Meter Name	Energy Type	Last Meter Entry (End Date)	Alerts
No Meters Defined			

Campus Water Meters <a href="#">Add Meter</a>   <a href="#">View All Meter Data in Excel</a>				
Meter Name	Units	Use	Last Meter Entry (End Date)	Alerts
No Meters Defined				

1)

1) General Campus Administration: These links allow a user access to perform high-level functions for the facility, including Viewing Campus Facilities, Adding Campus Facilities, Removing Campus Facilities, and Deleting Campuses.

# View Campus Facilities Page



1) This page shows one table for active facilities and another for inactive facilities. Click on a facility name to go to the Facility Summary page.

2) Click the Done button. You will be returned to the Campus Summary page.

**PORTFOLIO MANAGER**

ACCOUNT INFORMATION
 CONTACTS
 FREQUENTLY ASKED

[Home](#) > [My Portfolio](#) > [Test University Campus](#) > View Campus Facilities

**View Campus Facilities: Test University Campus**

[Add Campus Facilities](#)  
[Remove Campus Facilities](#)

**ACTIVE FACILITIES**

Facility Name	Date Facility became part of Campus	Building Type	Current Energy Period Ending Date	Current Rating (1-100)	Adjusted Percent Energy Reduction	Total Floor Space (Sq. Ft.)	Current Total Site Energy Use (kBtu)	Current Site Energy Intensity (kBtu/Sq. Ft.)
<a href="#">ABC Residence Hall</a>	01/01/2004		N/A	N/A		0	0.00	0.0
<a href="#">My Buildings 1</a>	01/01/2004	Office	02/29/2004	90	No Reduction	100,000	7,843,704.95	78.4
<a href="#">My Office Building</a>	01/01/2004	Office	04/30/2004	100	No Reduction	100,000	2,829,400.99	28.3
<a href="#">Office Sample #1</a>	01/01/2004	Office	05/31/2001	84	No Reduction	200,000	14,176,089.55	70.9
<a href="#">Other Test Space</a>	01/01/2004		06/30/2005	N/A	No Reduction	20,000	614,160.00	30.7

**INACTIVE FACILITIES**

Facility Name	Dates Facility was part of Campus	Building Type	Current Energy Period Ending Date	Current Rating (1-100)	Adjusted Percent Energy Reduction	Total Floor Space (Sq. Ft.)	Current Total Site Energy Use (kBtu)	Current Site Energy Intensity (kBtu/Sq. Ft.)
No Facilities								

**DONE**





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## Additional Resources

# Learn More at **ENERGY STAR.GOV**

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- ENERGY STAR Home Page  
[www.energystar.gov](http://www.energystar.gov)
- ENERGY STAR for Buildings  
[www.energystar.gov/buildings](http://www.energystar.gov/buildings)
- Portfolio Manager  
[www.energystar.gov/benchmark](http://www.energystar.gov/benchmark)
- Portfolio Manager Login Page  
<https://www.energystar.gov/istar/pmpam/>



# Benchmarking Starter Kit



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- Industrial
- K-12
- Real Estate
- Retail
- Small Business
- Congregations
- Service & Products Providers
- Utilities & Energy Efficiency Program Sponsors
- Water/Wastewater Utilities

Home > Buildings & Plants > Portfolio Manager Overview > **ENERGY STAR Benchmarking Starter Kit**

## ENERGY STAR Benchmarking Starter Kit

Benchmarking your buildings' energy performance is a key first step to understanding and reducing energy consumption and your carbon footprint. All buildings can assess their energy performance, water efficiency, and carbon emissions using Portfolio Manager.

You can [login to Portfolio Manager](#) to:

- Track energy and water consumption
- Identify under-performing buildings
- Set priorities
- Monitor progress
- Verify improvements
- Receive EPA recognition

Once you have collected the necessary data, benchmarking is quick and simple. It requires only a few minutes a month and provides many valuable results.

The following resources will help a first-time Portfolio Manager user get started with benchmarking. After reviewing these resources, try benchmarking a single building to better understand the value of measuring your performance.

### Getting Started

- Use the [ENERGY STAR Portfolio Manager Data Collection Worksheet](#) to identify and gather all the data you'll need to benchmark your building.
- Print the [Portfolio Manager Quick Reference Guide](#) (1.3 MB) for a handy, at-a-glance guide to the basic steps of using Portfolio Manager.
- View [animated training](#) providing step-by-step benchmarking instructions.

### Beyond Benchmarking

Utilize the strategic [Guidelines for Energy Management](#) to learn how your organization can improve its energy and financial performance and be an environmental leader.

Upgrade your building to realize energy savings by using EPA's strategic 5-stage approach in the [Building Upgrade Manual](#).

View a [quick list](#) (2.9 MB) of ENERGY STAR resources for buildings.

**Portfolio Manager Data Collection Sheet**

**Portfolio Manager Quick Reference Guide**

**Animated Portfolio Manager Training**



# Downloading Import Templates




- (1) Click the Import Facility Data link, and on the next screen, right click on the desired template link. Select “Save Target As,” and follow the instructions.

**PORTFOLIO MANAGER**  
EPA's system for helping you track and improve energy efficiency across your entire portfolio of buildings.

[FAQ](#) [FREQUENTLY ASKED QUESTIONS](#) [CONTACT US](#) [HELP](#)

**WHAT'S NEW IN PORTFOLIO MANAGER**  
**Water Treatment and Distribution Facilities**  
The EPA is pleased to announce the addition of Water Treatment and Distribution Facilities to Portfolio Manager. Water Utilities will now be able to track and improve energy consumption and emissions by entering and managing data in Portfolio Manager. [Learn More](#)  
**Portfolio Manager Enhancements (Spaces Not Eligible to Receive a Rating)**  
Portfolio Manager now provides users the ability to manage buildings that are eligible to receive a rating as well as those that are not – all within the same online platform. [Learn More](#)

**Username:**   
[Forgot your username?](#)  
**Password:**   
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New User? [Register](#)

**ENERGY STAR Labeled Buildings**  
  
  
**Ada County Courthouse & Administration Bldg**  
200 W Front Street  
Boise, ID 83702  
[Read Profile](#)

**About Portfolio Manager**

- [Learn](#) what Portfolio Manager can do for your organization
- [Take](#) the Portfolio Manager Tour
- [Explore](#) some Frequently Asked Questions about our October 1, 2007 Updates
- [Train](#) on how to use Portfolio Manager
- [Review](#) eligibility requirements to benchmark your facility
- [Import](#) facility data

**Success through ENERGY STAR**

- [Learn](#) about ENERGY STAR Leaders that have improved organization-wide
- [Take](#) the ENERGY STAR Challenge – improve your buildings' energy efficiency by 10%
- [Find](#) buildings that have earned the ENERGY STAR

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[Buildings & Plants](#)

# Training Opportunities

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- EPA offers free online interactive training with WebEx, including:
  - ENERGY STAR Overview
  - Benchmarking Energy and Water Use
  - Financing Energy Efficiency Improvements
  - And many more!
- Visit [www.energystar.gov/buildingstraining](http://www.energystar.gov/buildingstraining) for a detailed list of training opportunities.

# For More Information

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Visit [www.energystar.gov/government](http://www.energystar.gov/government)

E-mail [buildings@energystar.gov](mailto:buildings@energystar.gov)

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