Step-by-Step Instructions for State Agencies, Colleges and Universities Benchmarking Buildings

GA Energy Program
ENERGY STAR Portfolio Manager

1. **Start by [viewing the animated training session](http://www.energystar.gov/ia/business/benchmarking_training/benchmarking.html)** (http://www.energystar.gov/ia/business/benchmarking_training/benchmarking.html) on the Energy Star Portfolio Manager website.
There is audio, so be ready to turn down the volume. This training session sometimes takes a few minutes to load. Review the [Frequently Asked Questions (FAQ) for Washington State Agencies](http://www.ga.wa.gov/energy/EnergyStarFAQ.pdf) (http://www.ga.wa.gov/energy/EnergyStarFAQ.pdf), which contains answers to questions asked by agencies and colleges at the first training sessions in Washington State.

2. **Talk to your [agency, college or university point of contact](http://www.ga.wa.gov/energy/ListOfAgenciesAndContactsForPortfolioManager.pdf)** (http://www.ga.wa.gov/energy/ListOfAgenciesAndContactsForPortfolioManager.pdf) **for instructions on using your agency master account**, and sharing with others in your agency. Until we have successfully reported on our first year of energy use, please continue to use the password provided with the account. This will make it easier for EPA to provide us with technical assistance. Your agency point of contact may instruct you to use the established master account which bears your agency name, or may instruct you to create an account and share access with the agency master account.   Each agency will organize their accounts according to their need to manage and access information internally. Your account will have a user name and password. You control access to your account. You can share your account with other users, and you define what level of access they have (read only, entering utility data, and/or updating facilities characteristics). Determine who in your agency needs access, and what type, when deciding how to share your account access.

3. **Follow the instructions in the animated training session (see #1 above) to create facilities in your Portfolio Manager account.** The Portfolio Manager, like OFM, calls a building a "Facility." (OFM will provide each facility with a unique identifier called the OFM FIS number, sometime in 2010. For now, leave space for the number to be added to the Facility Name later.) Here is the format for every state agency or higher education Facility Name in Portfolio Manager: **agency abbreviation, campus (if applicable), building name, OFM FIS number. For example, DOC MICC Admin Building FA12345O or WSU Vancouver Library FA98765O**. You can use as many as 60 characters for your Facility Name, but it is probably more practical to keep it short. It is very important that the OFM FIS number is at the end of the Facility Name (when you

have it), because General Administration (GA) will be selecting the last 6 or more digits in the Facility Name to sort and associate that building with its characteristics in the OFM Facilities database. If you have difficulty entering you facility into the Portfolio Manager, see the Frequently Asked Questions and other resources on the GA Energy Program ENERGY STAR webpage (http://www.ga.wa.gov/energy/EnergyStar.htm). If you are unable to resolve your problem, use the contacts provided to call or email for assistance.

4. **Follow instructions in the animated training session to create meters and enter utility data into your Portfolio Manager account.** If you have difficulty, see the Frequently Asked Questions and other resources on the GA Energy Program ENERGY STAR webpage (http://www.ga.wa.gov/energy/EnergyStar.htm). If you are unable to resolve your problem, use the contacts provided to call or email for assistance.

5. **Share the facilities in your account with General Administration (GA)** (http://www.ga.wa.gov/energy/HowToShareAFacilityWithGeneralAdministration.pdf), giving read-only access, before July 2010, so that GA can post the energy use of your facilities for public viewing, and create reports.