# Pre-Webinar Polling Question

**How much experience do you have with using Portfolio Manager?**

- **A.** None (don't have an account created)
- **B.** Beginner (created account, just getting started benchmarking)
- **C.** Intermediate
- **D.** Advanced

# A Beginner's Guide to Using Portfolio Manager for Benchmarking Law Compliance

# "Basics of Building Benchmarking for Ordinance Compliance" Webinar Series

- **Part 1** (April 10 and May 9)

*A Beginner's Guide to Using Portfolio Manager for Benchmarking Law Compliance*

- **Part 2** (April 24 and May 22 )

*Using Benchmarking Results to Understand your Building's Performance*

- **Part 3** (May 8 and June 6)

*To Efficiency and Beyond! How to Benefit from Benchmarking Compliance with Strategies for Improving your Energy Performance*

**https://www.energystar.gov/buildings/training/complying_ordinances**

# Learning Objectives

- Understanding the role of EPA's Portfolio Manager tool in benchmarking law compliance
- Getting started using Portfolio Manager
- Successfully submitting building data to your local jurisdiction

**Note:** ENERGY STAR also has short videos on introductory topics related to Portfolio Manager available at www.energystar.gov/buildings/training

# Learning Objectives

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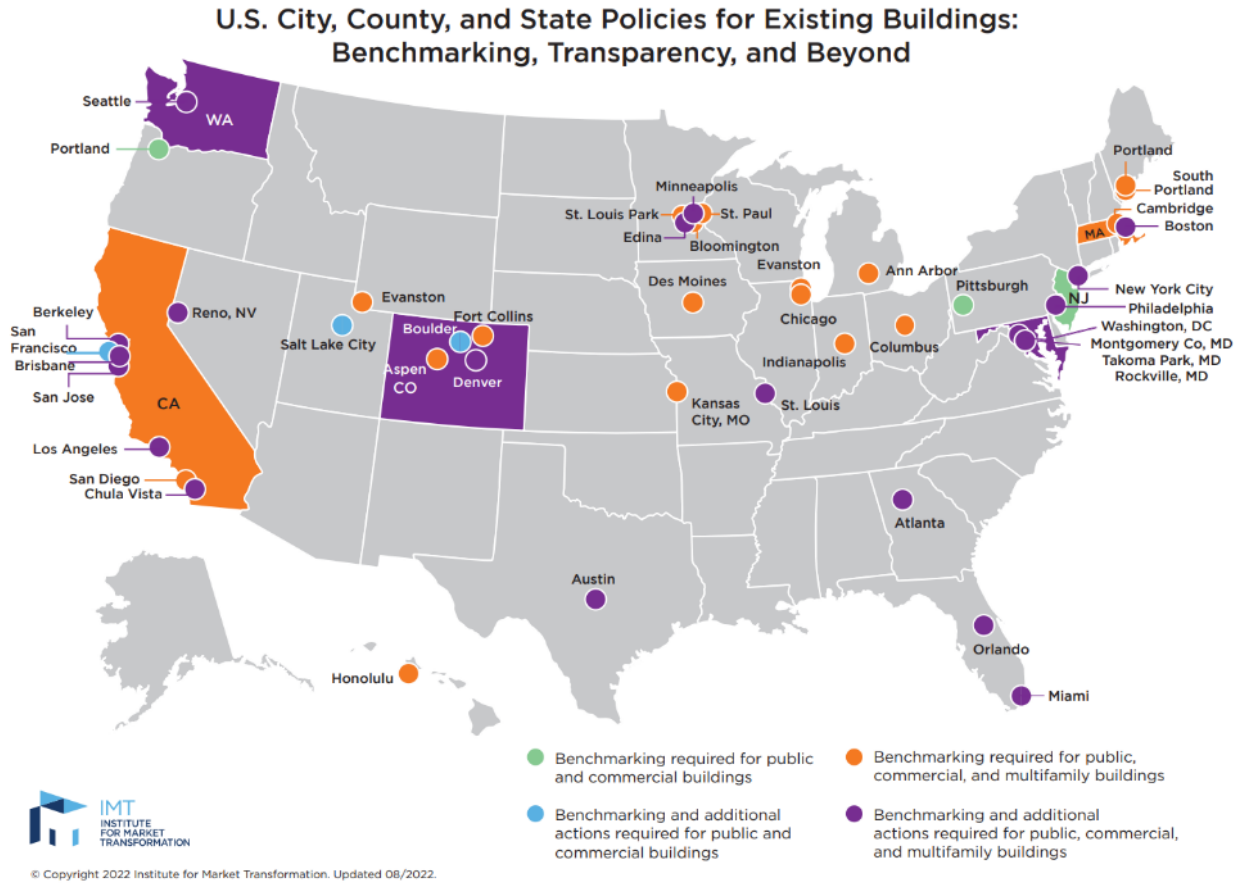
# What is a Benchmarking Law?




Map: U.S. City, County, and State Policies for Existing Buildings: Benchmarking, Transparency and Beyond - IMT

# EPA vs. Jurisdiction Responsibilities

## The EPA and ENERGY STAR can answer questions about…

- How to use Portfolio Manager
- Portfolio Manager metrics such as the ENERGY STAR score
- Portfolio Manager alerts and data quality checks
- How to connect with other Portfolio Manager users including utilities and 3rd party service providers

## Your state or local jurisdiction can answer questions about…

- Which buildings are subject to the benchmarking law
- Which data and time periods are required for reporting
- Due dates for submission and fines
- Confirmation that your report was received and/or complete

# Portfolio Manager and Benchmarking Laws in Canada

Please direct all questions about Canadian benchmarking laws to Natural Resources Canada:

- **Toll free**: 1-877-360-5500
- **Ottawa local**: 613-992-3245
- **Email**: buildings-batiments@nrcan-rncan.gc.ca
- **Website:** https://www.nrcan.gc.ca/energy-efficiency/energy-star-canada/18953

Natural Resources Canada

Ressources naturelles Canada

Canada

ENERGY STAR

# Online List of Service Providers

## Most Active Service & Product Providers

ENERGY STAR Service and Product Providers (SPPs) have demonstrated their expertise and achievements by meeting strict ENERGY STAR program requirements for benchmarking customer buildings using Portfolio Manager and gaining ENERGY STAR certification for buildings. Use this directory to find SPPs that have done the most for their clients through ENERGY STAR in the past 12 months.

**Also see these additional provider partners:** Most Active Service Providers That Exchange Data with Portfolio Manager via Web Services, Most Active Architecture & Engineering Firms, and Most Active Industrial Service & Product Providers.

**This list shows SPP activity for the past 12 months, updated quarterly.**

Benchmarked properties located in Canada are not included in the totals. For information on Canadian benchmarking, please contact nrcan.buildings-batiments.rncan@canada.ca.

Please note, the links below leave the energystar.gov domain. For more information visit our Exit Disclaimer.

**1 - 276** of 276 Show: 25 | 50 | 100 | All

1

| Company Name EXIT | Company Type | Contact | Benchmark | ENERGY STAR Certifications |
|---|---|---|---|---|
| Schneider Electric | Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management | Erik Mohn<br>502-614-2348 (phone)<br>erik.mohn@se.com | 48200 | 506 |
| ENGIE Impact | Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management | Paige Janson<br>800-767-4197 (phone)<br>info@engieimpact.com | 46444 | 376 |
| Conservice, LLC | Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management;Energy Information and Data Management | Brett Kraus<br>435-713-2136 (phone)<br>bkraus@conservice.com | 29724 | 1298 |
| Measurabl, Inc. | Energy Information and Data Management | Measurabl Team<br>619-719-1716 (phone)<br>info@measurabl.com | 25980 | 1609 |
| Bright Power, Inc. | Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management | Jeffrey Perlman<br>212-803-5868 (phone)<br>jperlman@brightpower.com | 21997 | 202 |
| WegoWise | Energy or Architecture Related Professional, Consulting or Procurement Services;Energy Management | Dan Teague<br>617-367-9346 (phone)<br>dteague@wegowise.com | 20393 | 45 |

**View the list online here: https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/save-energy/expert-help/find-spp/most_active**

ENERGY STAR

# Learning Objectives

- Understanding the role of EPA's Portfolio Manager tool in benchmarking law compliance
- **Getting started using Portfolio Manager**
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**Note:** ENERGY STAR also has short videos on introductory topics related to Portfolio Manager available at www.energystar.gov/buildings/training

# To get started benchmarking in Portfolio Manager you will need…

1. Property information:
   - Primary function
   - Name, address, zip/postal code
   - Year built
   - Gross floor area

2. Property use details, e.g.:
   - Operating hours
   - No. of computers
   - No. of workers, etc.

3. Consumption data for all resources that you need to report for the duration of the compliance period

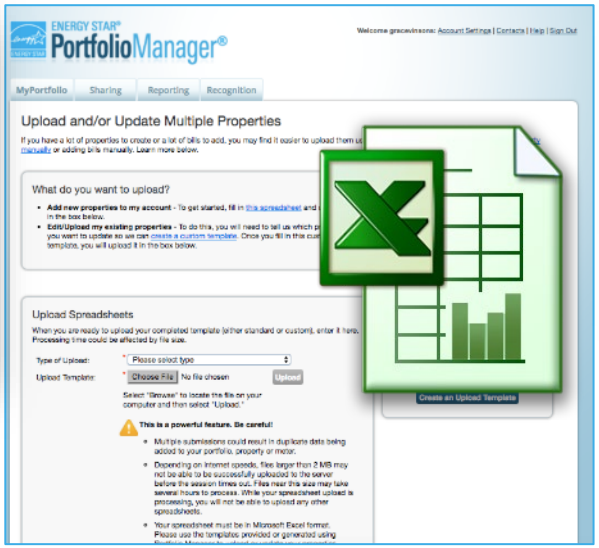
Use Portfolio Manager's **data collection worksheet** to gather data upfront for your property type/s

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

# Get Data Into Portfolio Manager

**Manual entry**

**Spreadsheet upload**



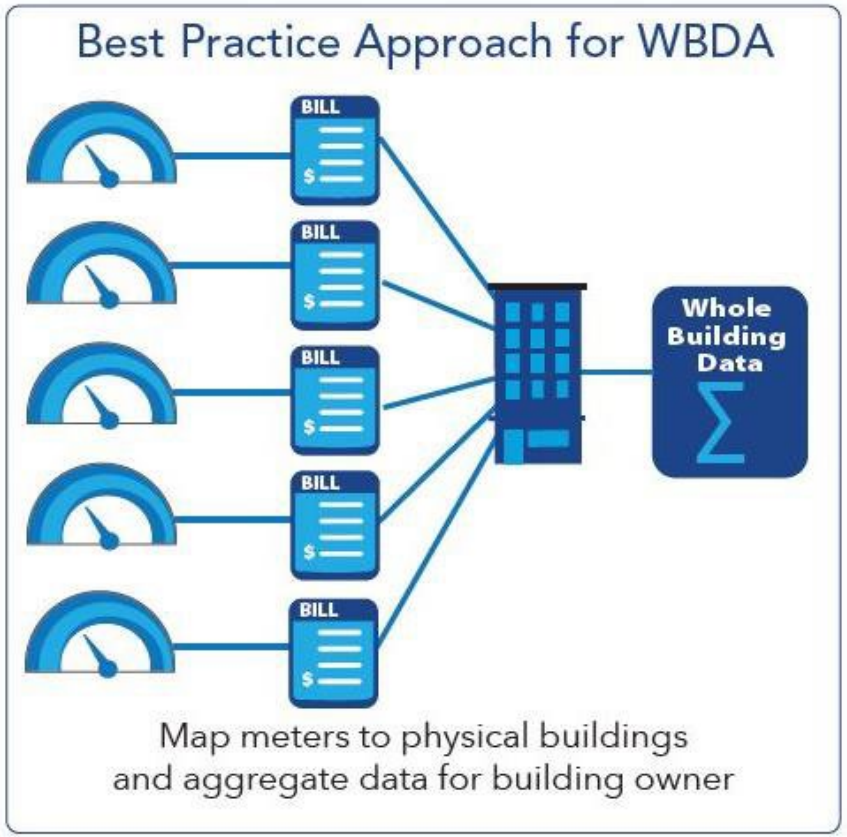

**Automated data uploads**

Choose the best data management method.

**More on how to get utility data into Portfolio Manager:**
**https://www.energystar.gov/buildings/tools-and-resources/how-get-data-portfolio-manager**

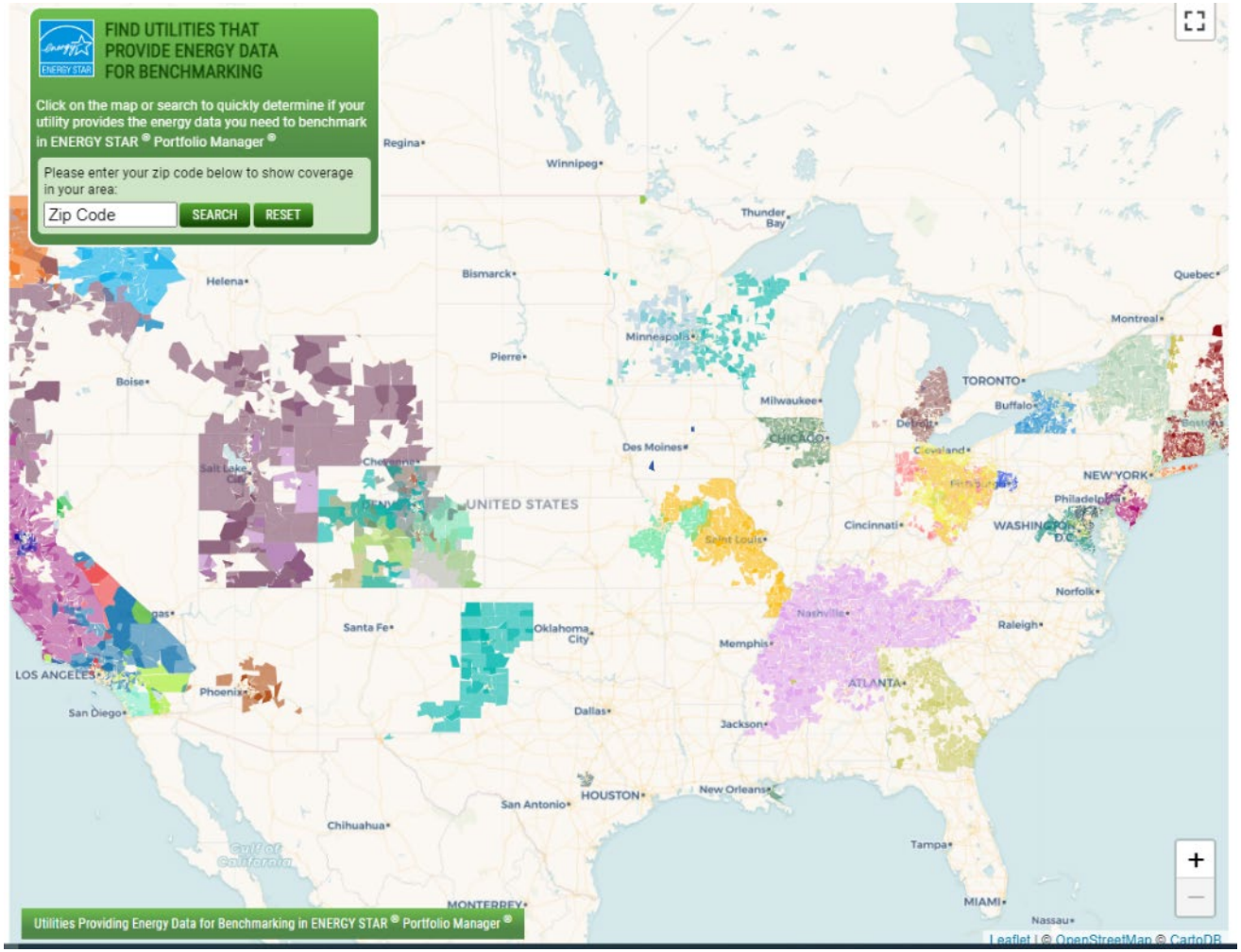
# Utility Data Access and the Benefits of Aggregate Data

- Without complete, whole-building consumption data (all fuels, all meters), benchmarking results will not be accurate.
- Obtaining complete consumption data can be difficult for some multi-tenant/multi-family scenarios.
- Many utilities can provide aggregate whole-building consumption data (i.e., a single consumption value for each fuel for each month).

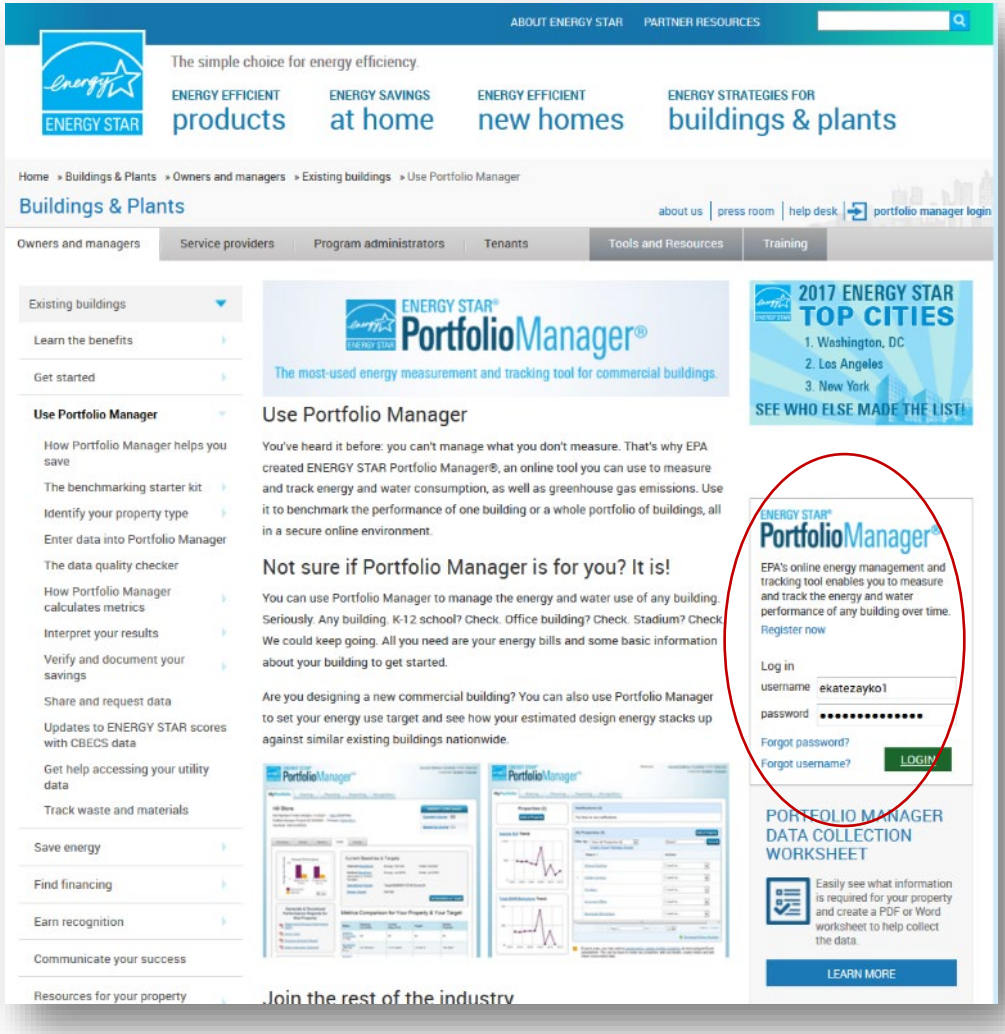



*Credit: US Department of Energy*

# Utility Data Access Map




Website: [https://www.energystar.gov/utilitydata](https://www.energystar.gov/utilitydata)

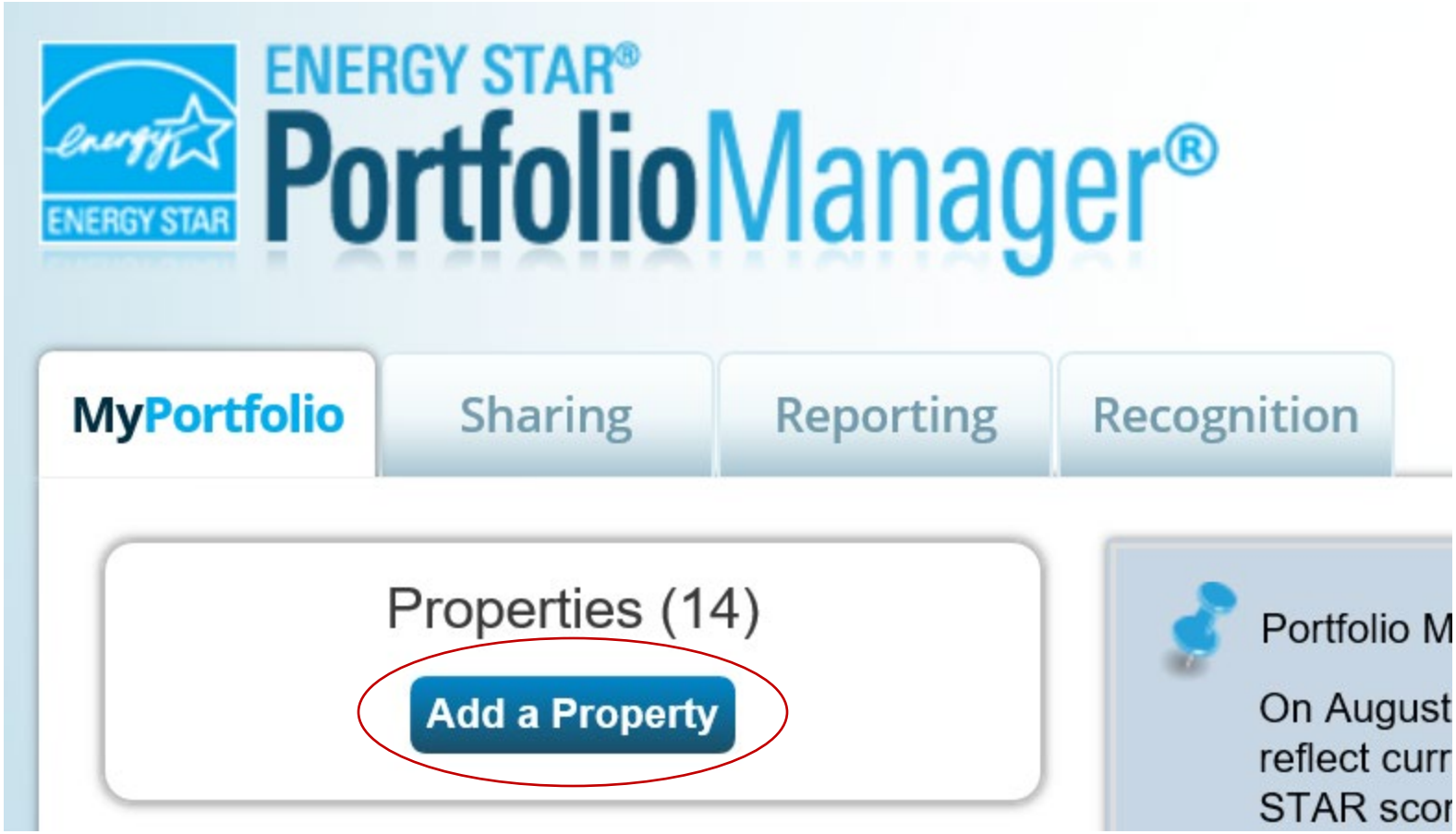



ENERGY STAR®
# PortfolioManager®

**Select "Register Now"**

Free, online secure platform: [www.energystar.gov/portfoliomanager](www.energystar.gov/portfoliomanager)

# Add a Property

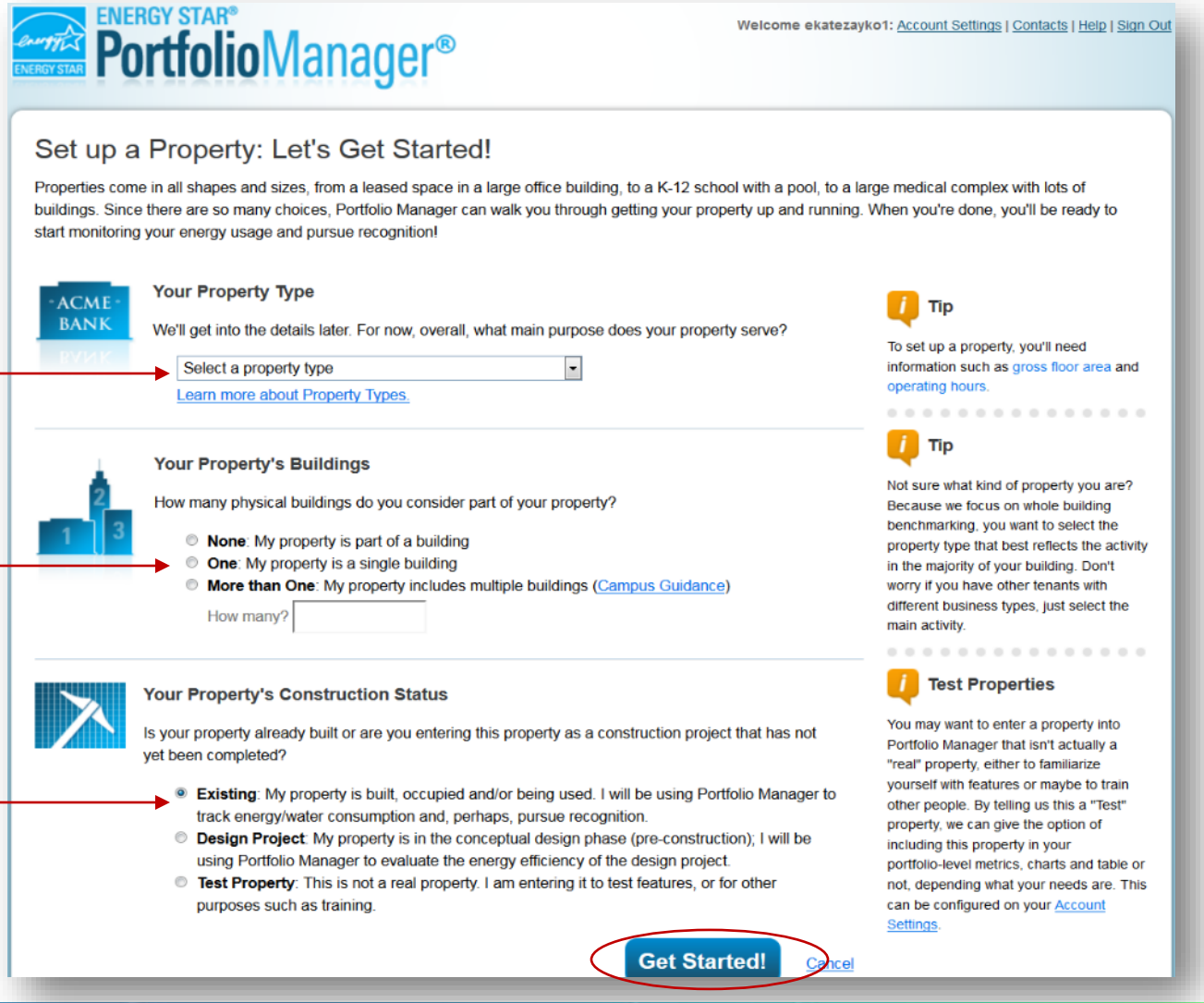


# Add a Property: Existing Property

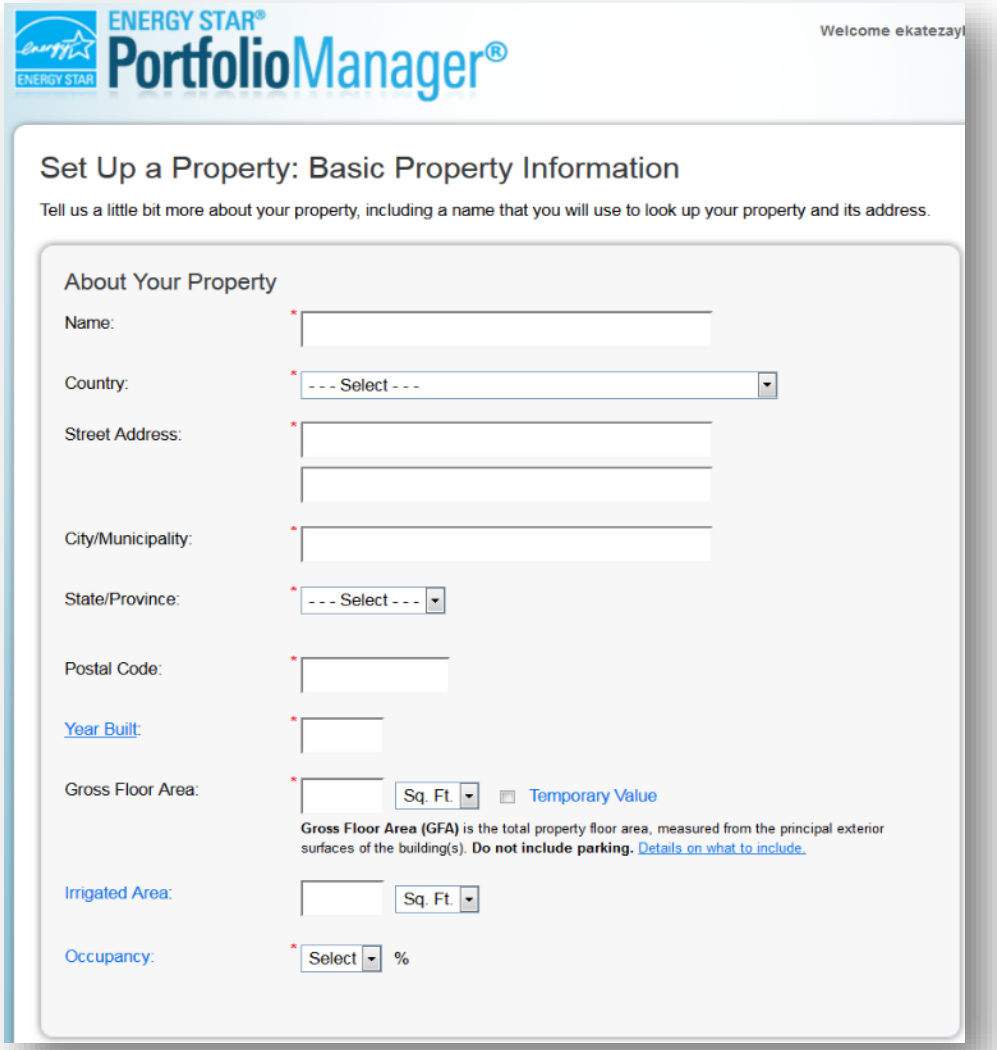
Select Property Type

Select number of buildings

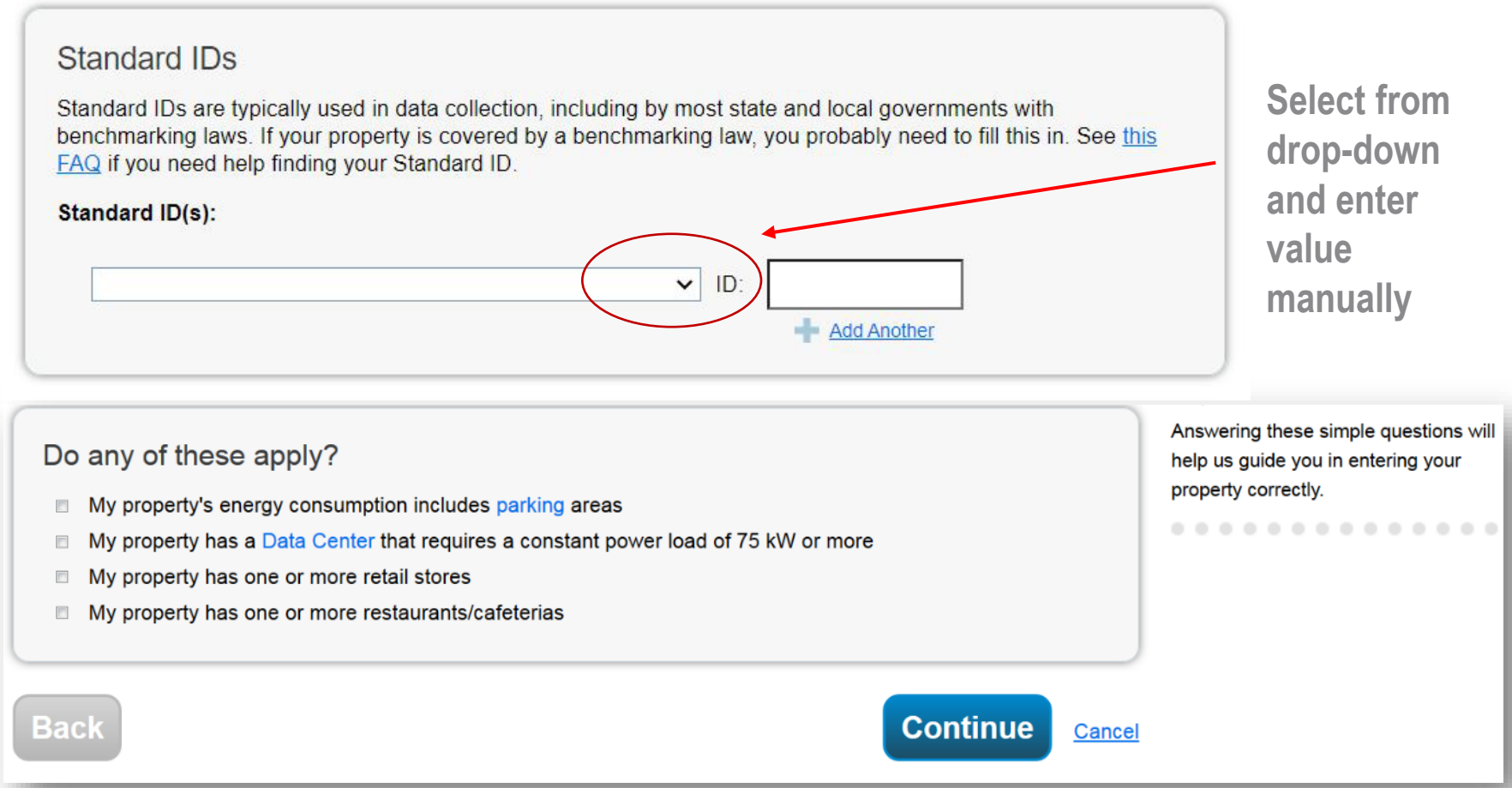
Select construction status



# Basic Property Information

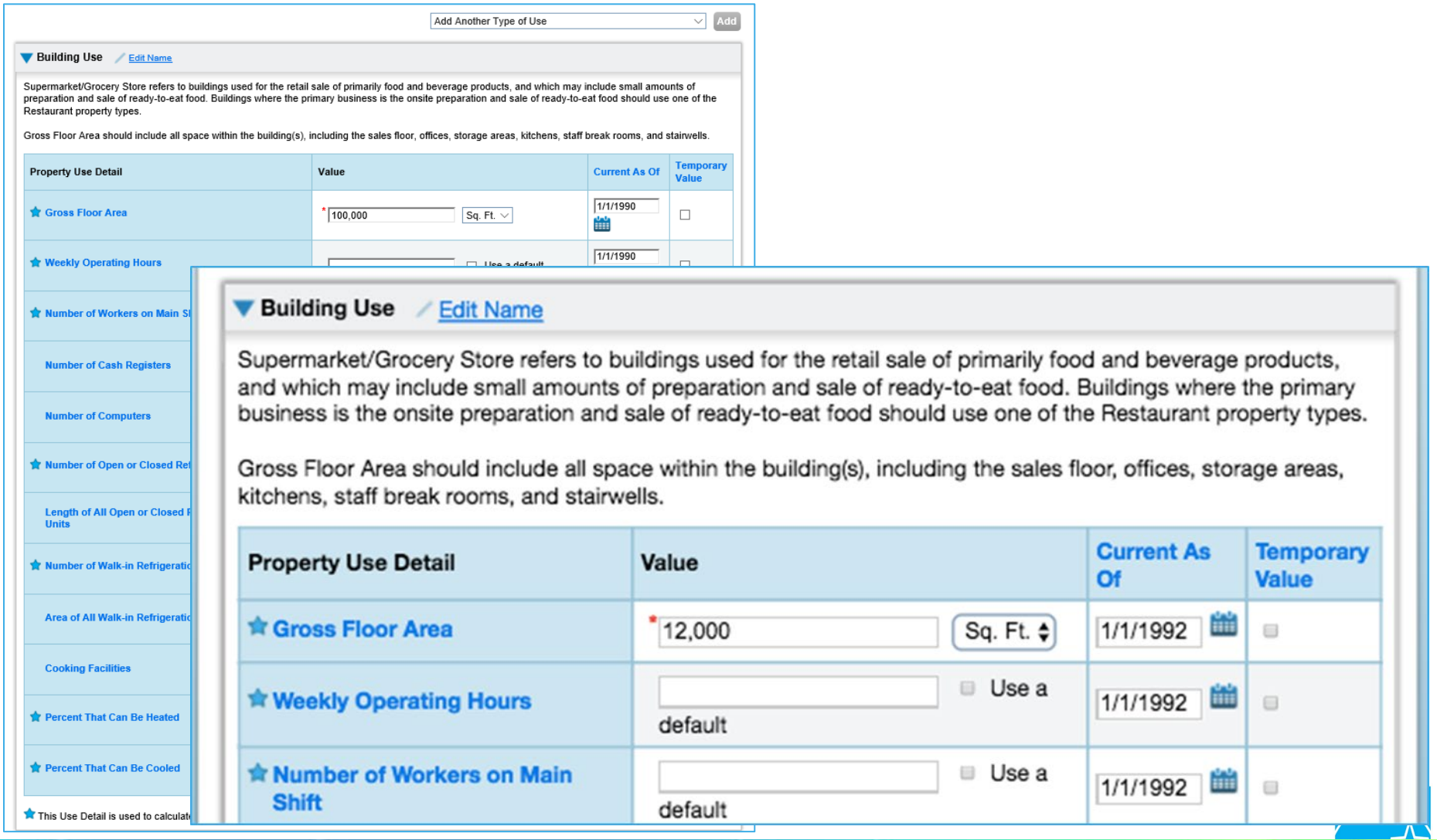


# Basic Property Information

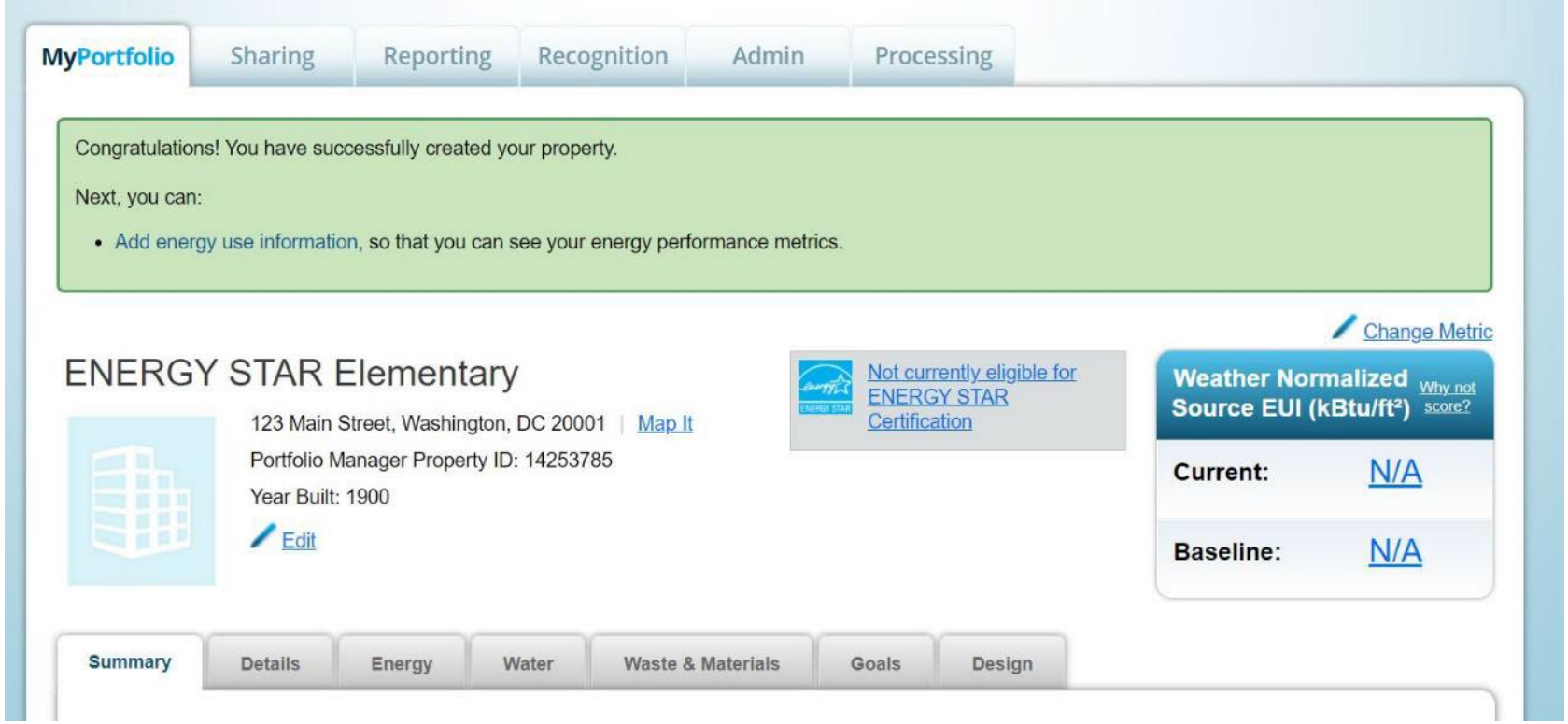



Need help figuring out your standard ID? Click here: https://sforce.co/3a2Fixh

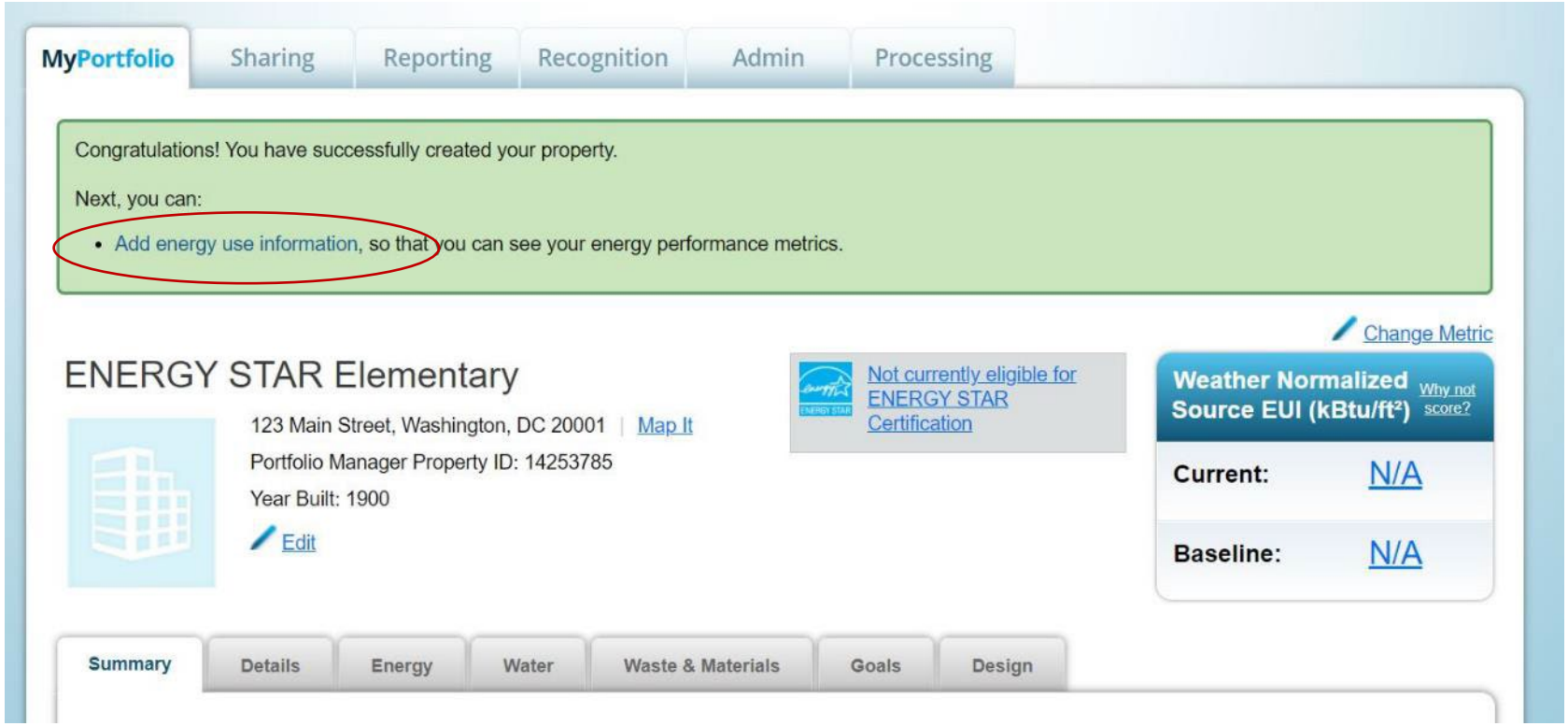
# Enter Values for Property Use Details



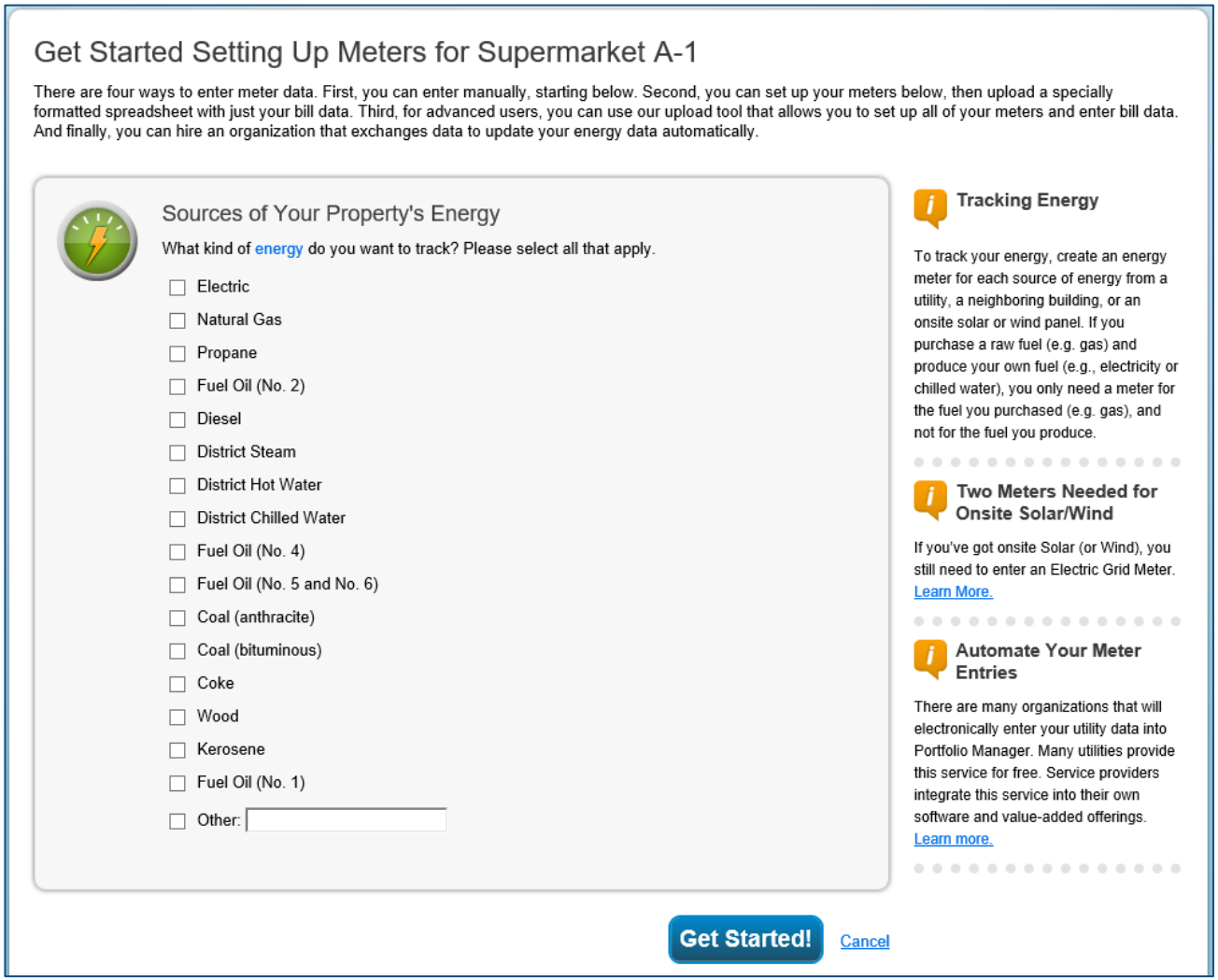
# Property Summary Tab



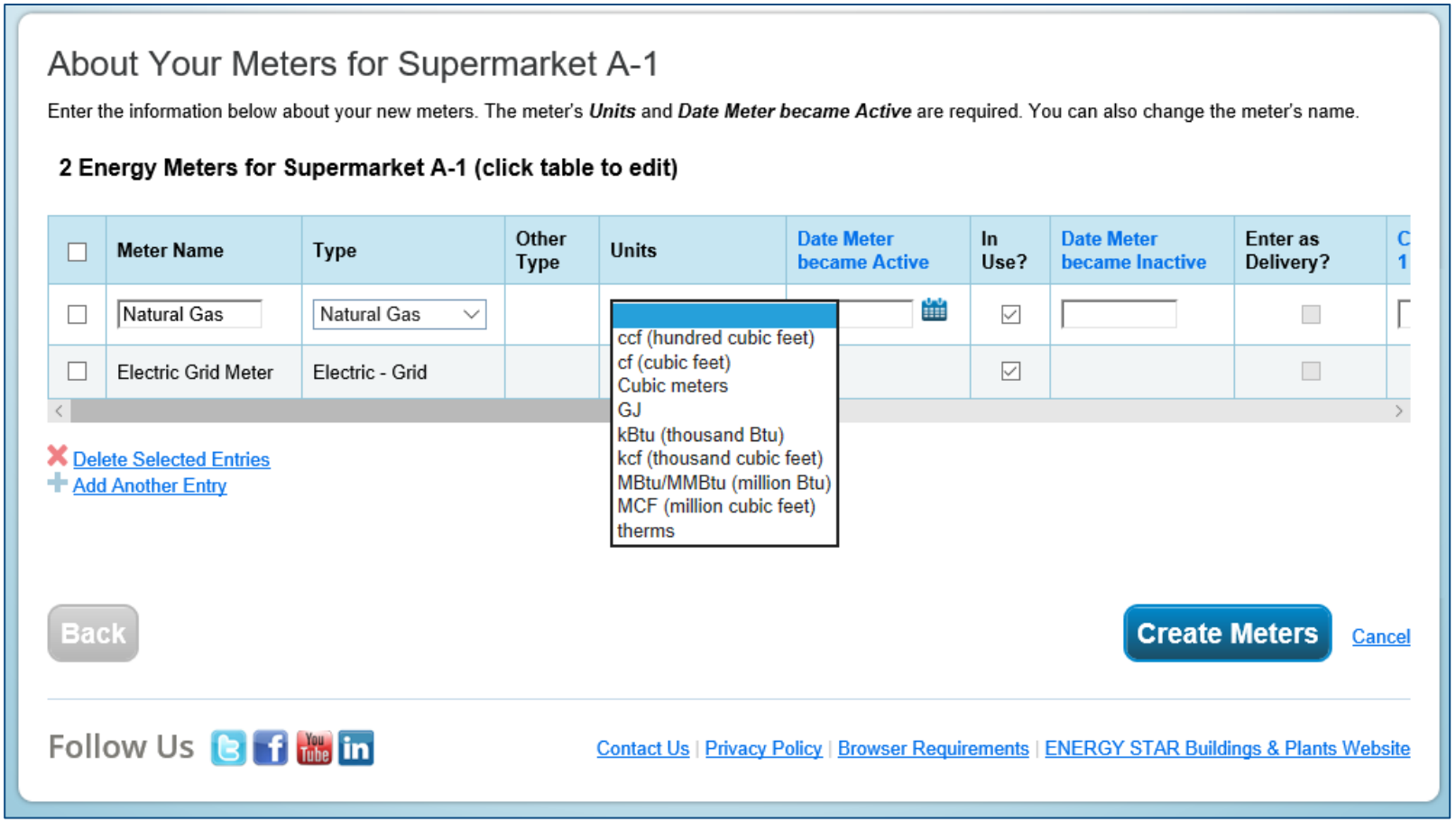
# Manual Data Entry – Energy Meters



# Enter Additional Information

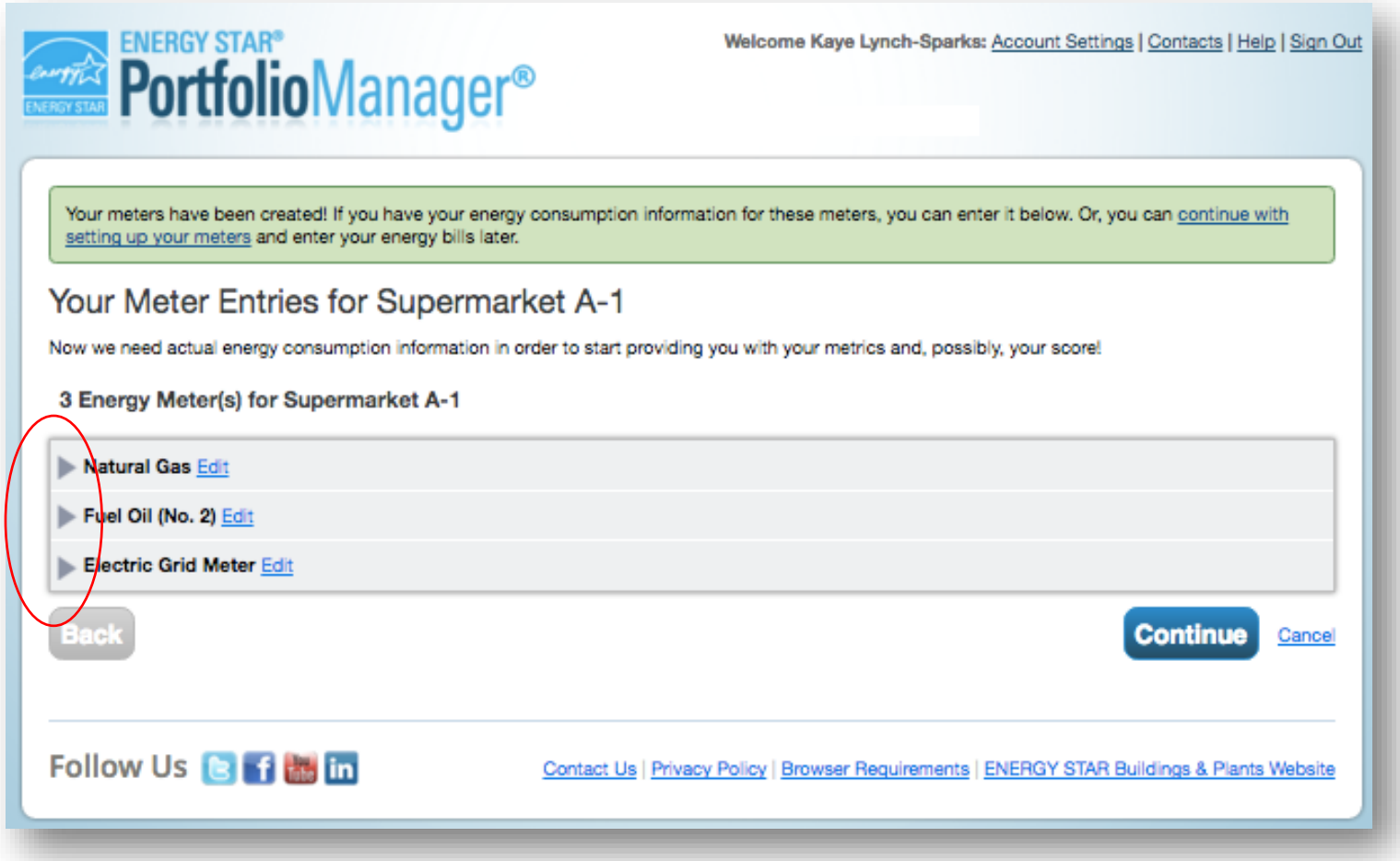


# About Your Meters



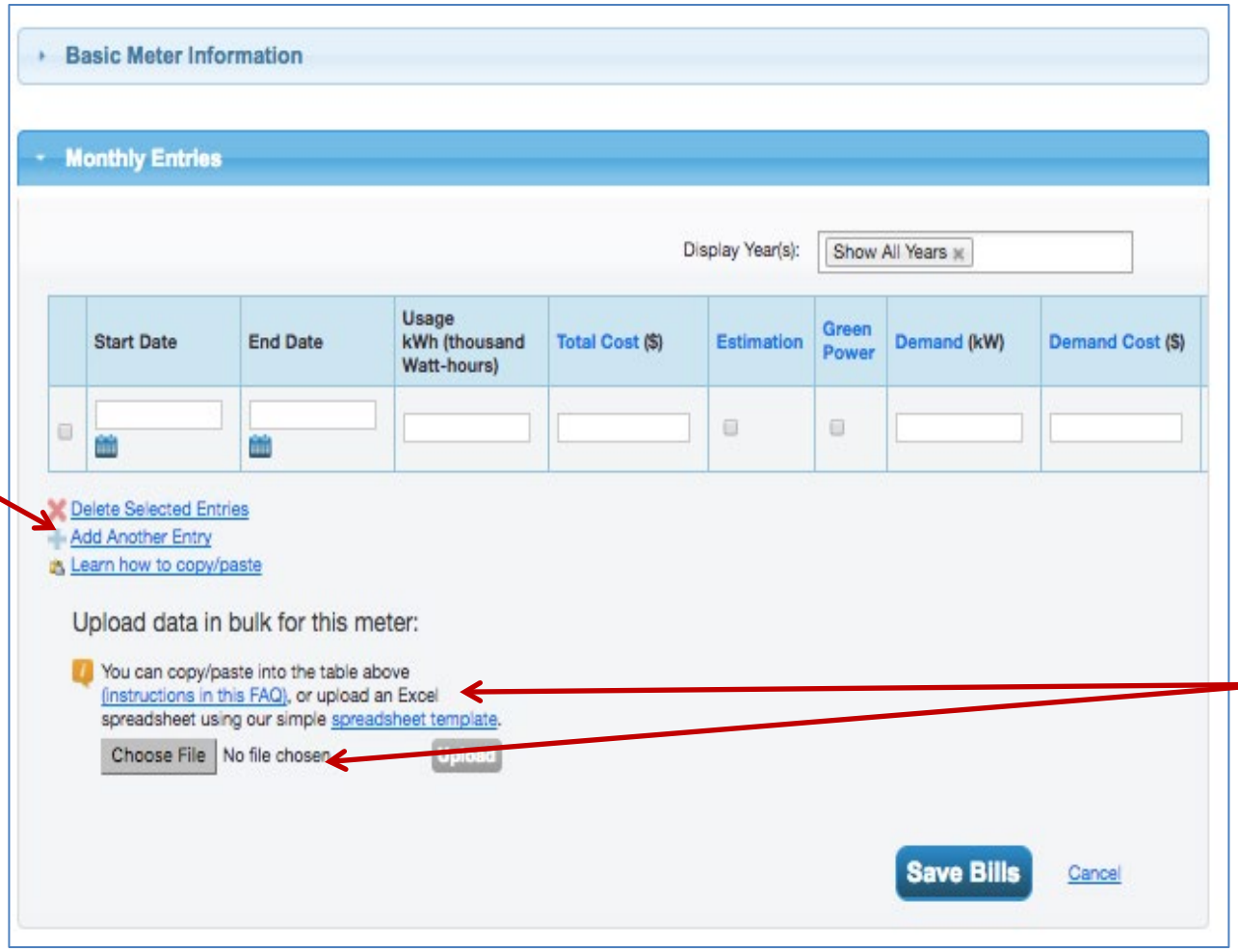
# Add Energy Consumption Information

Expand meter by clicking arrow



# Add Meter Entries and Fill in Data

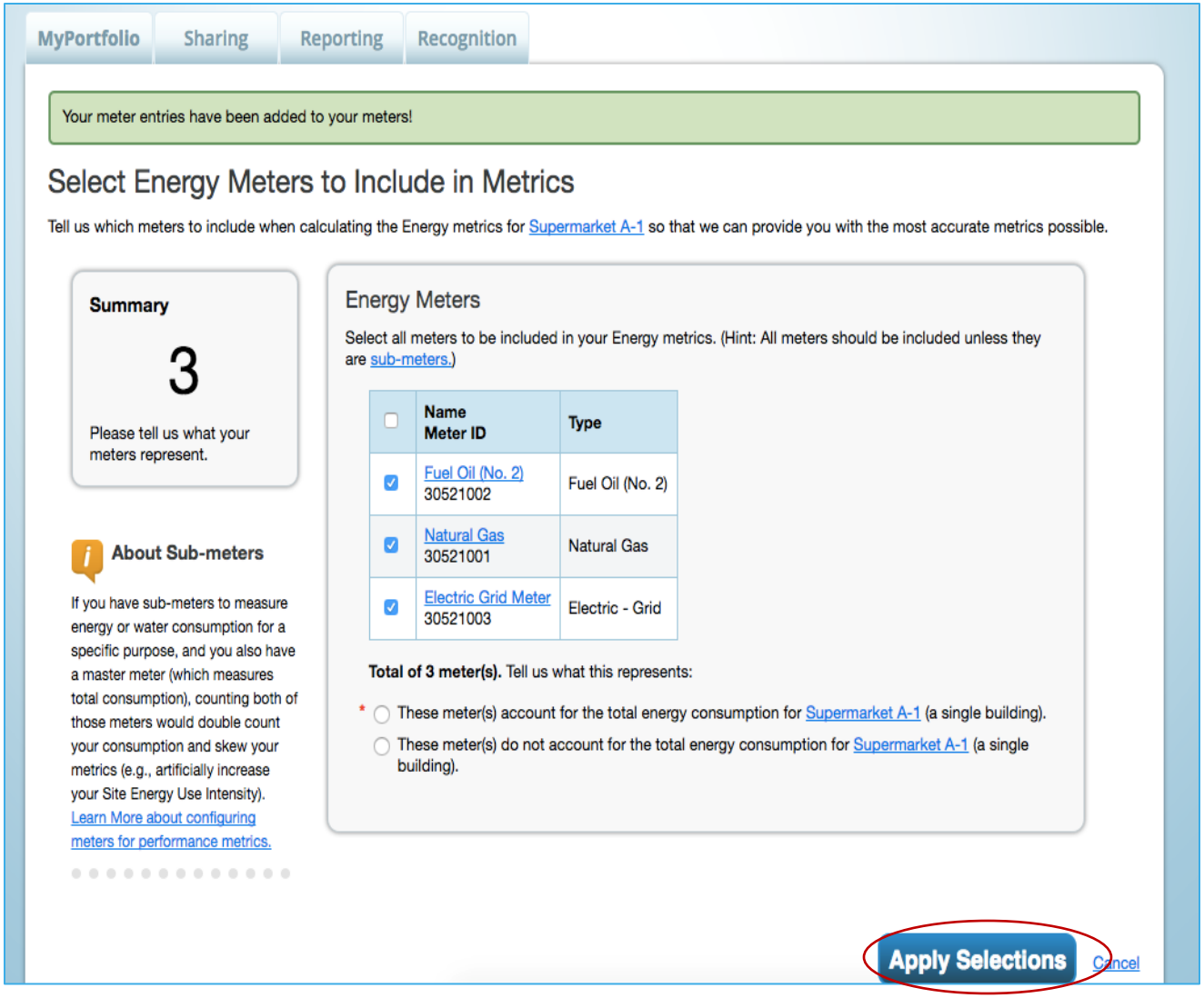
Add another entry




How To Guide: Electric Demand Tracking https://www.energystar.gov/buildings/tools-and-resources/how_track_electric_demand_portfolio_manager.

Use a spreadsheet to upload or copy and paste

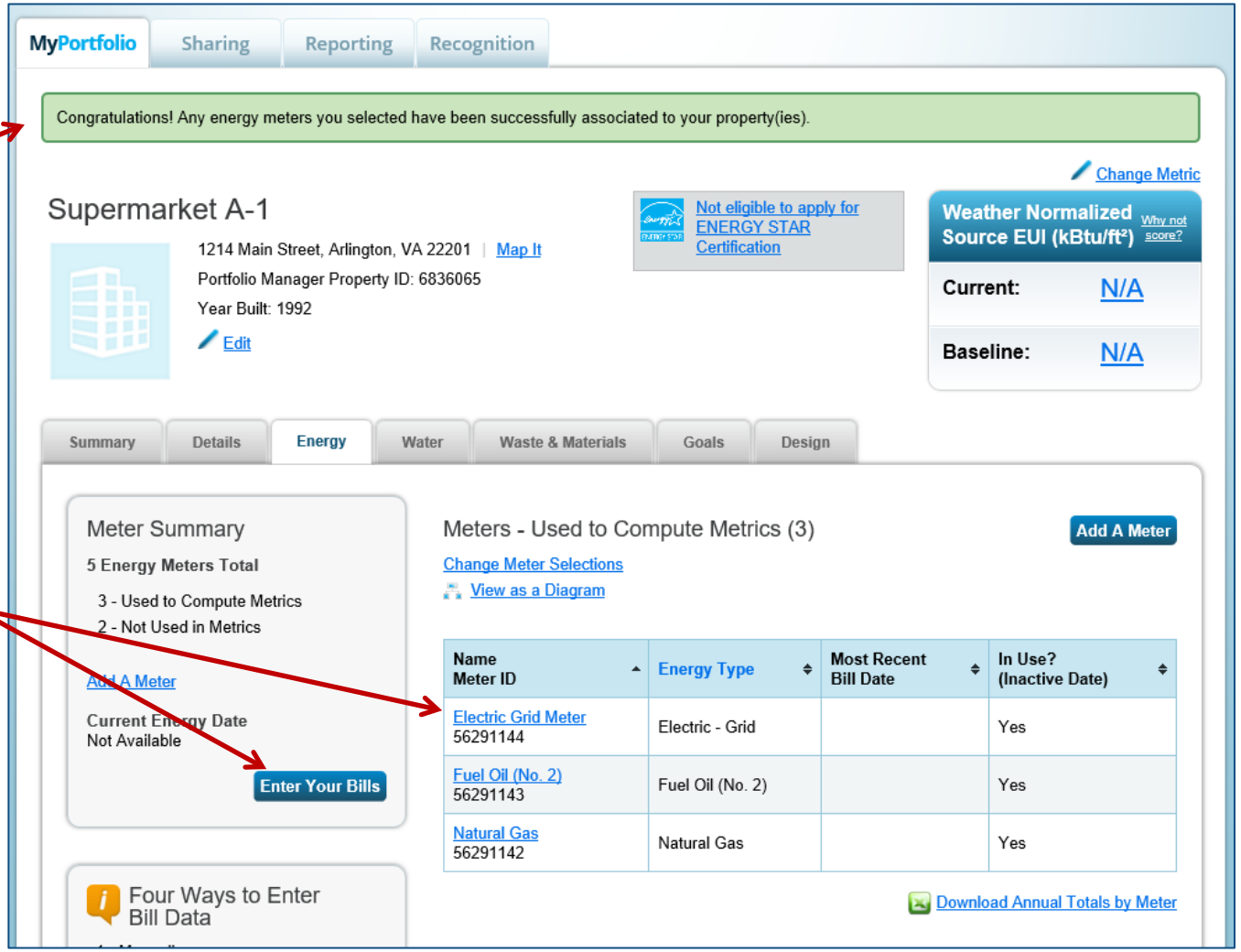
# Meters to Add to Total Consumption



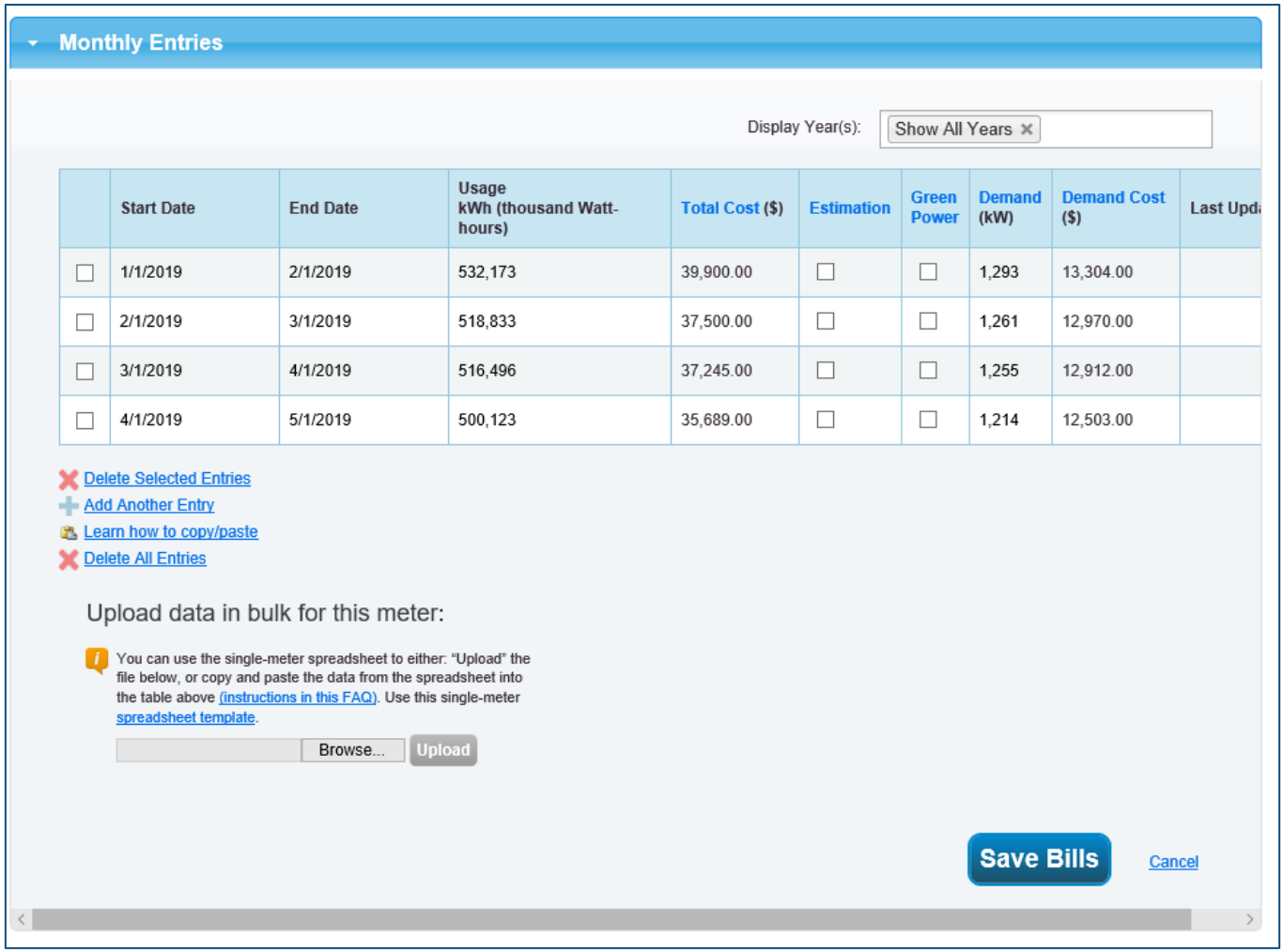
# Energy Meters Tab: Meters Added and Displayed

Notification

Add or update bills



# View Meter Data and Manage Bills for Your Property



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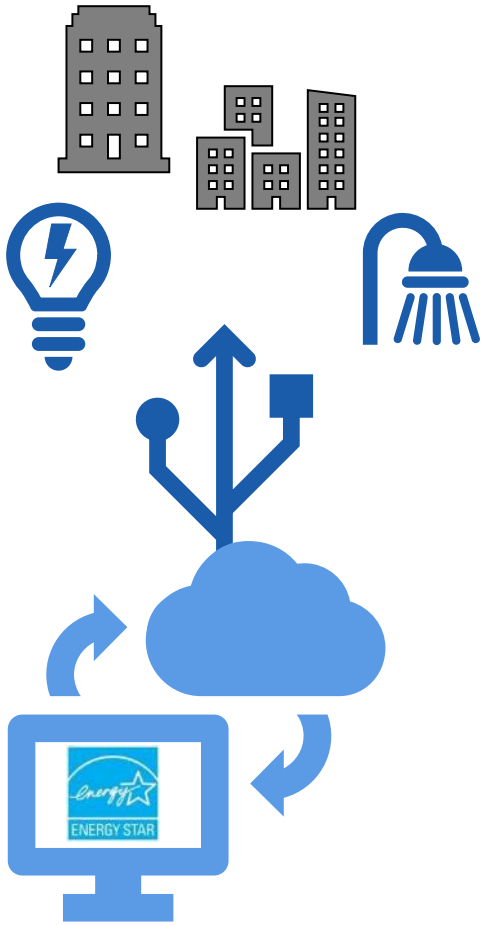
# Common Data Collection Methods

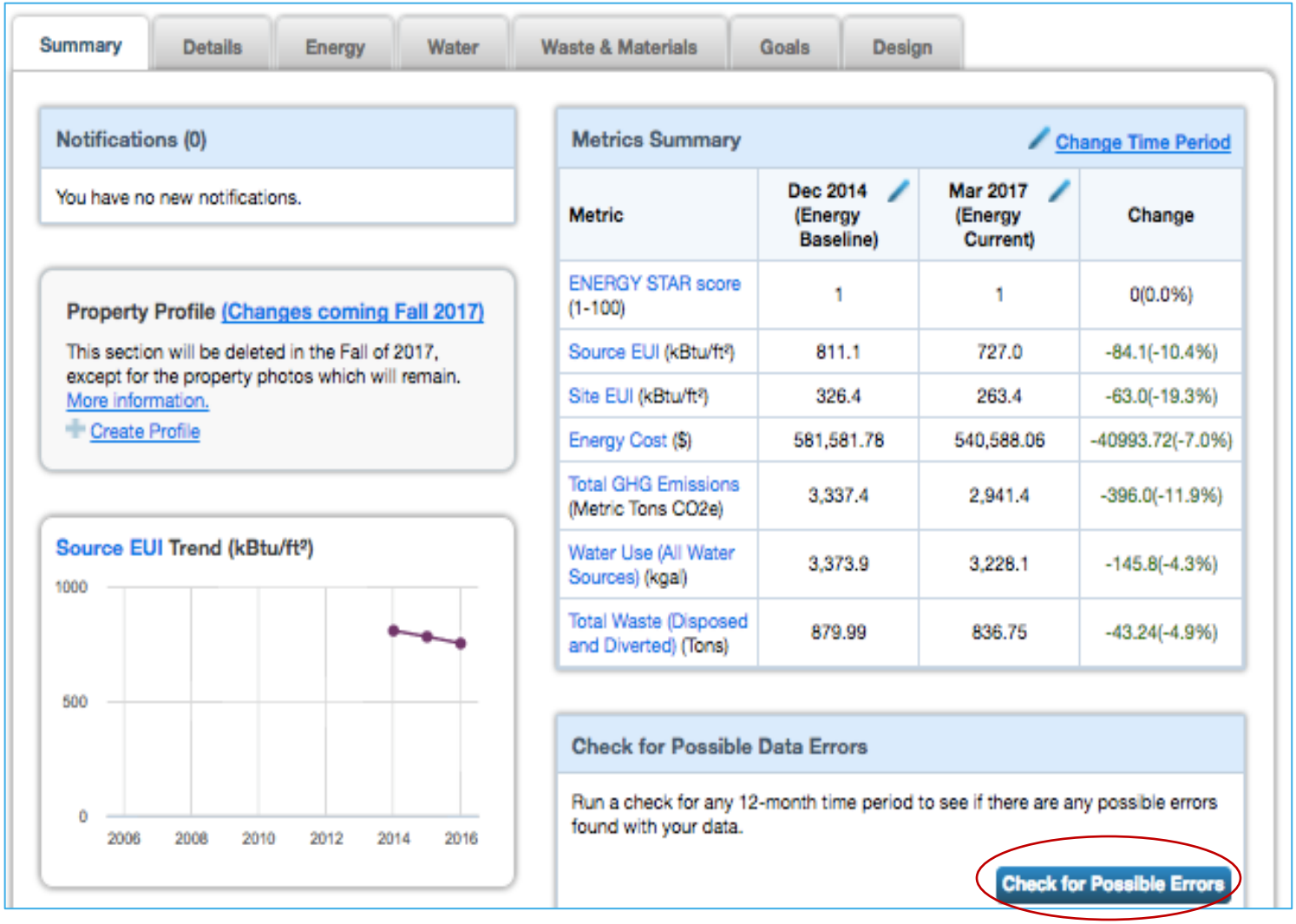
- Your local jurisdiction will likely collect the required data in one of two ways:

1. **Property Share** - a property share requires you to share your property record and data with your jurisdiction's Portfolio Manager account directly

2. **Data Request** - a Portfolio Manager Data Request that is accessed through a unique link and only requires you to share data for a specific time period

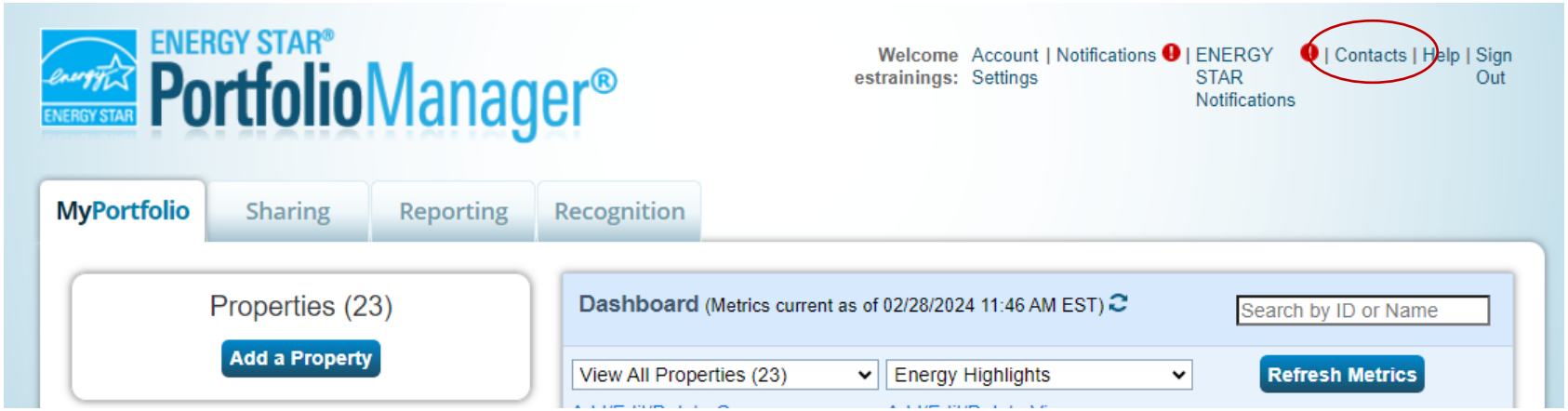


# Data Quality Checker

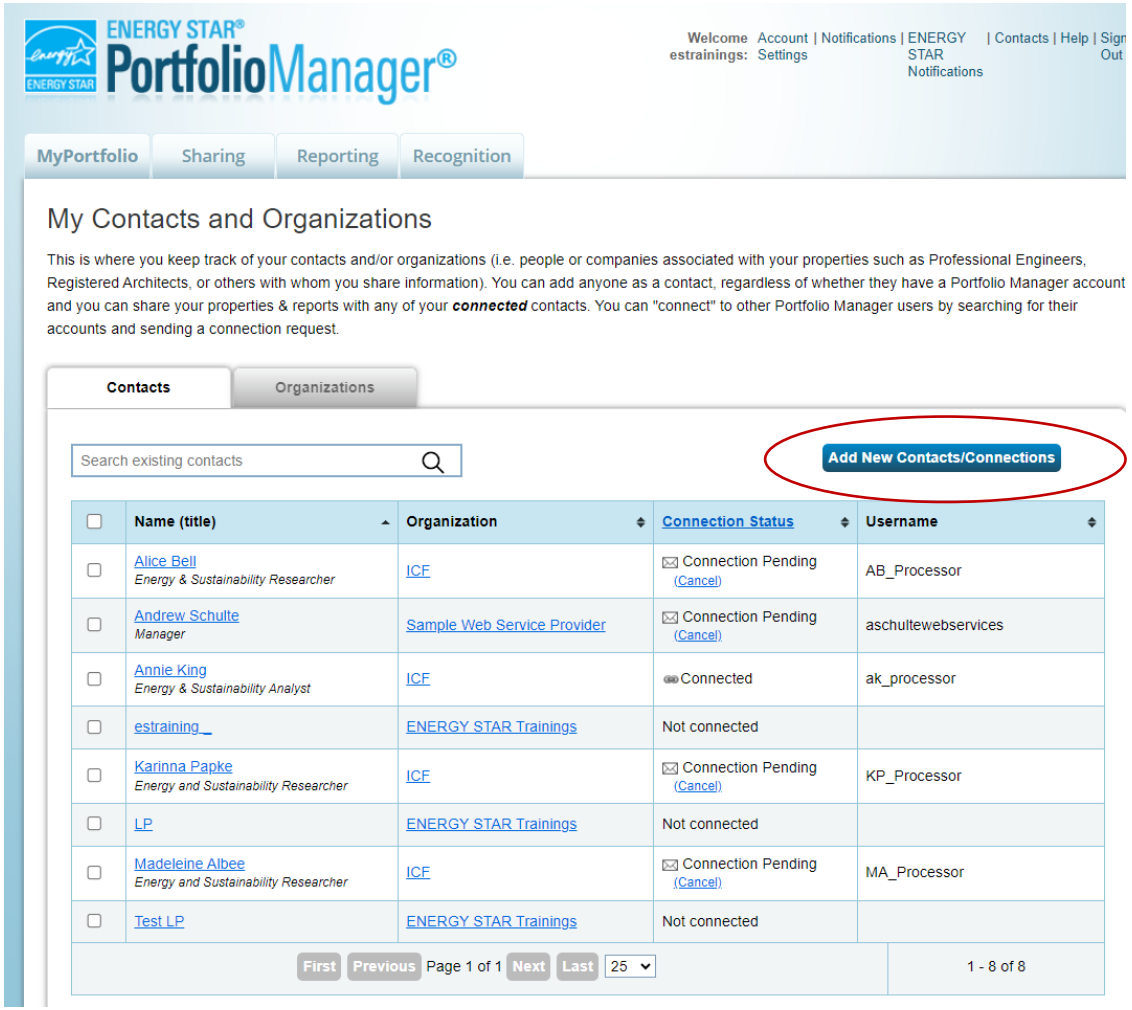


# Data Collection Method 1: Property Share

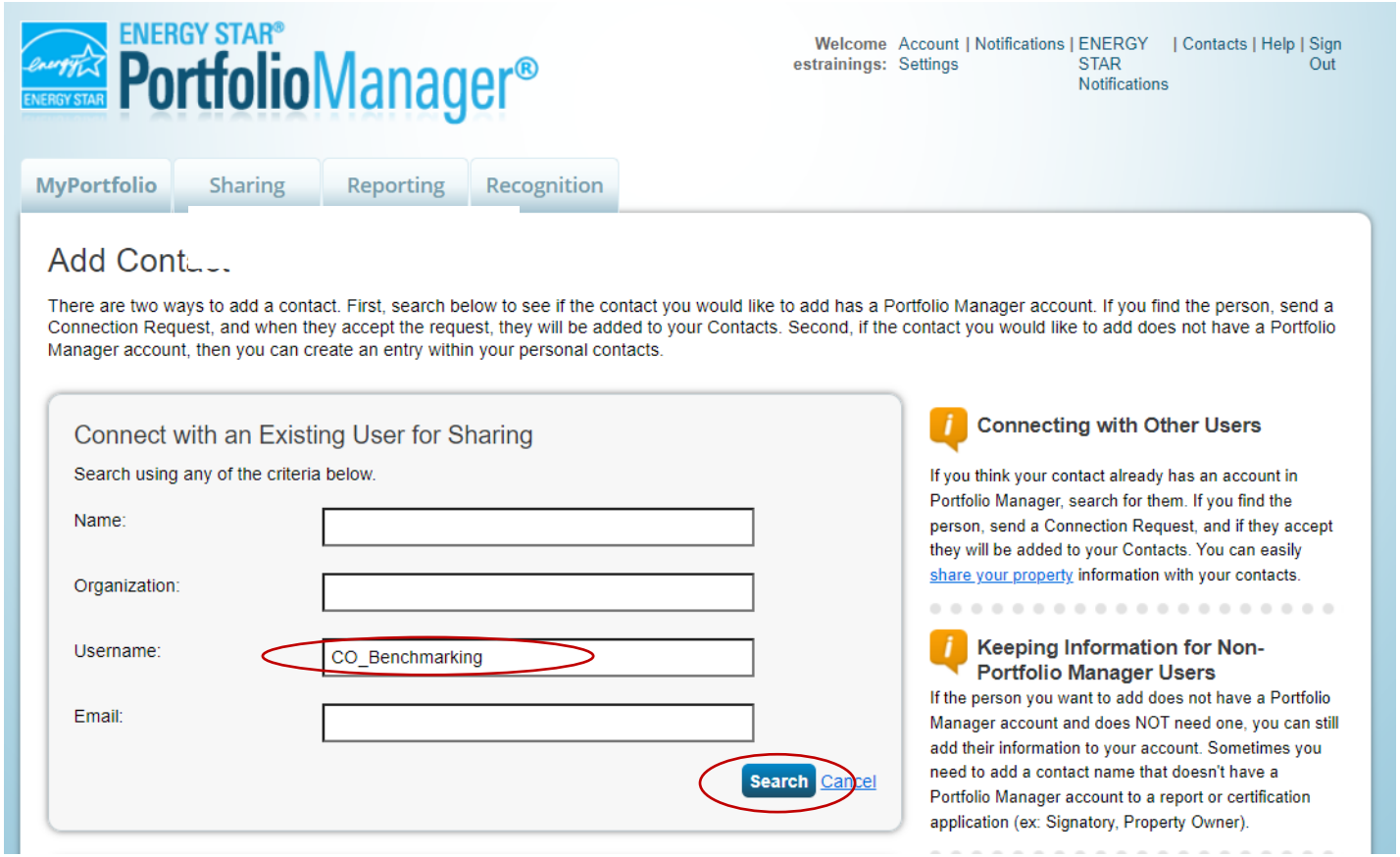
# Click on “Contacts” in the upper right corner



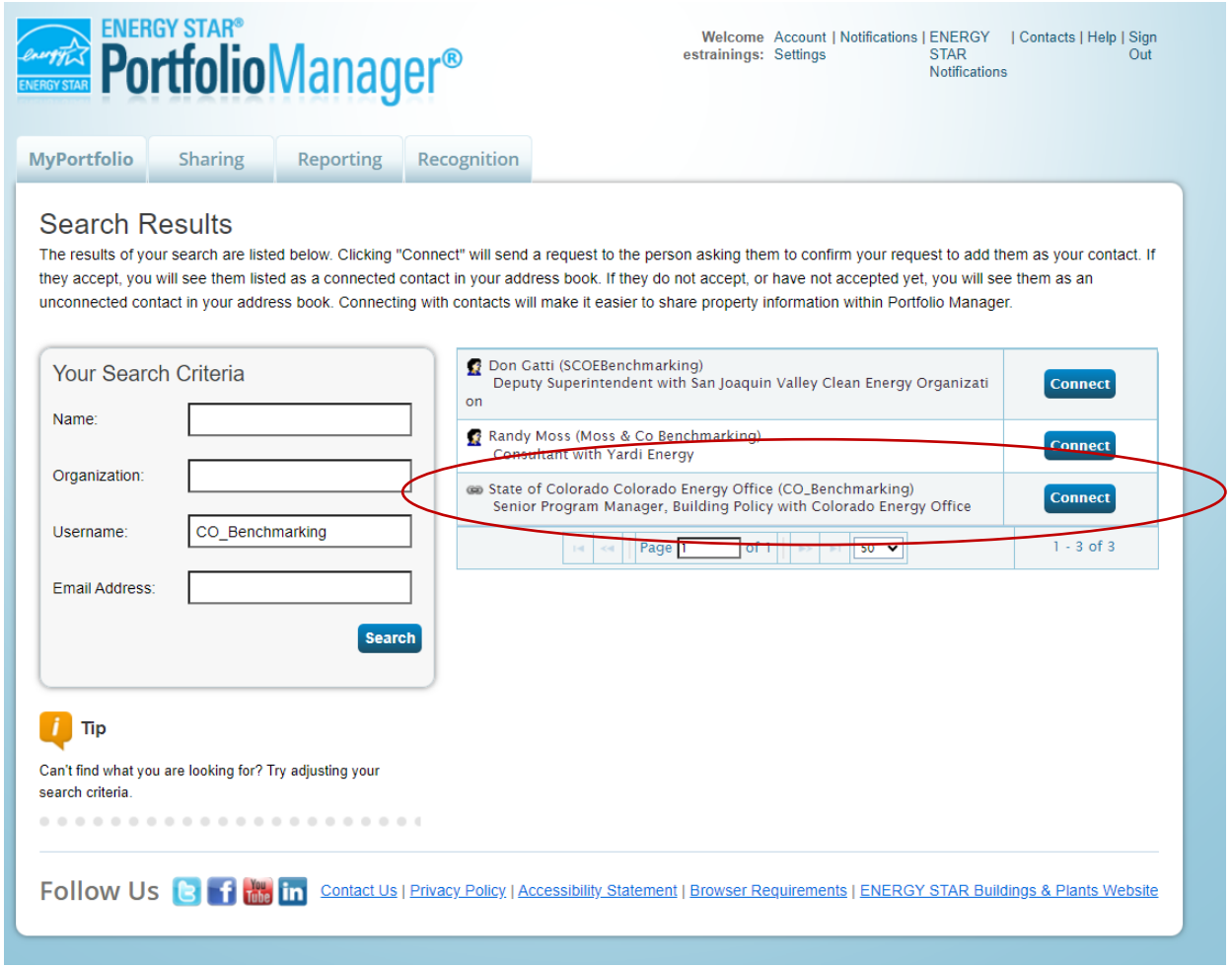
## Click on “Add New Contacts/Connections”



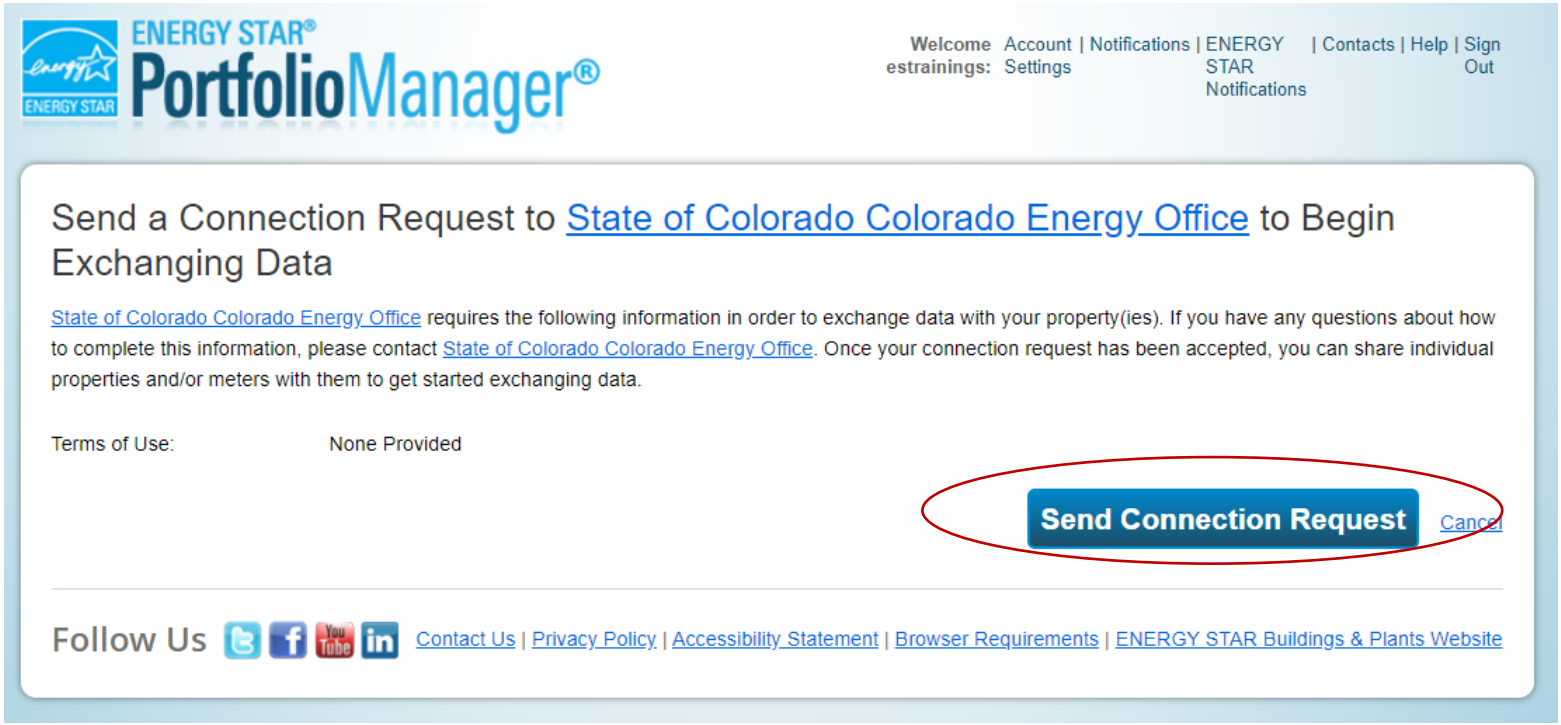
# Enter your state energy office's username and search



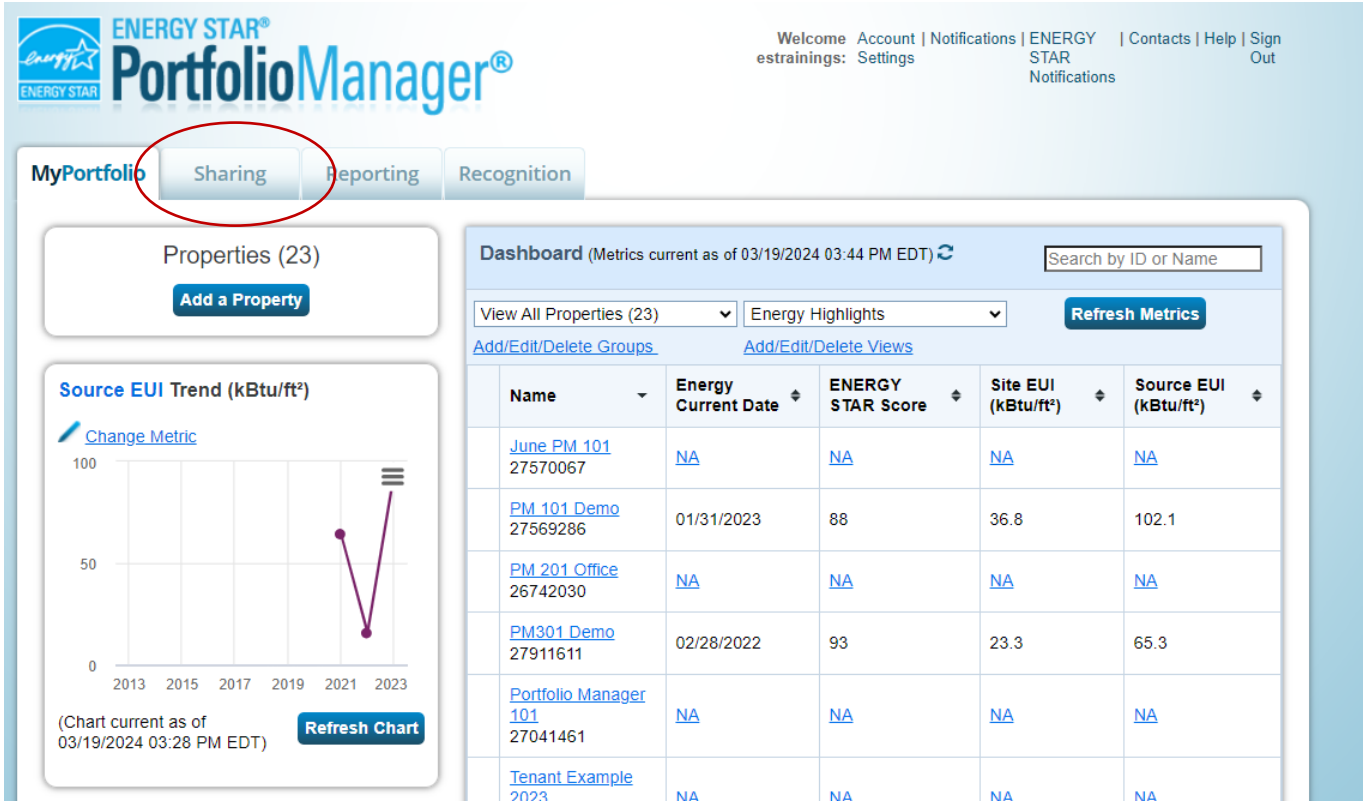
**Click "Connect" for the State Energy Office**



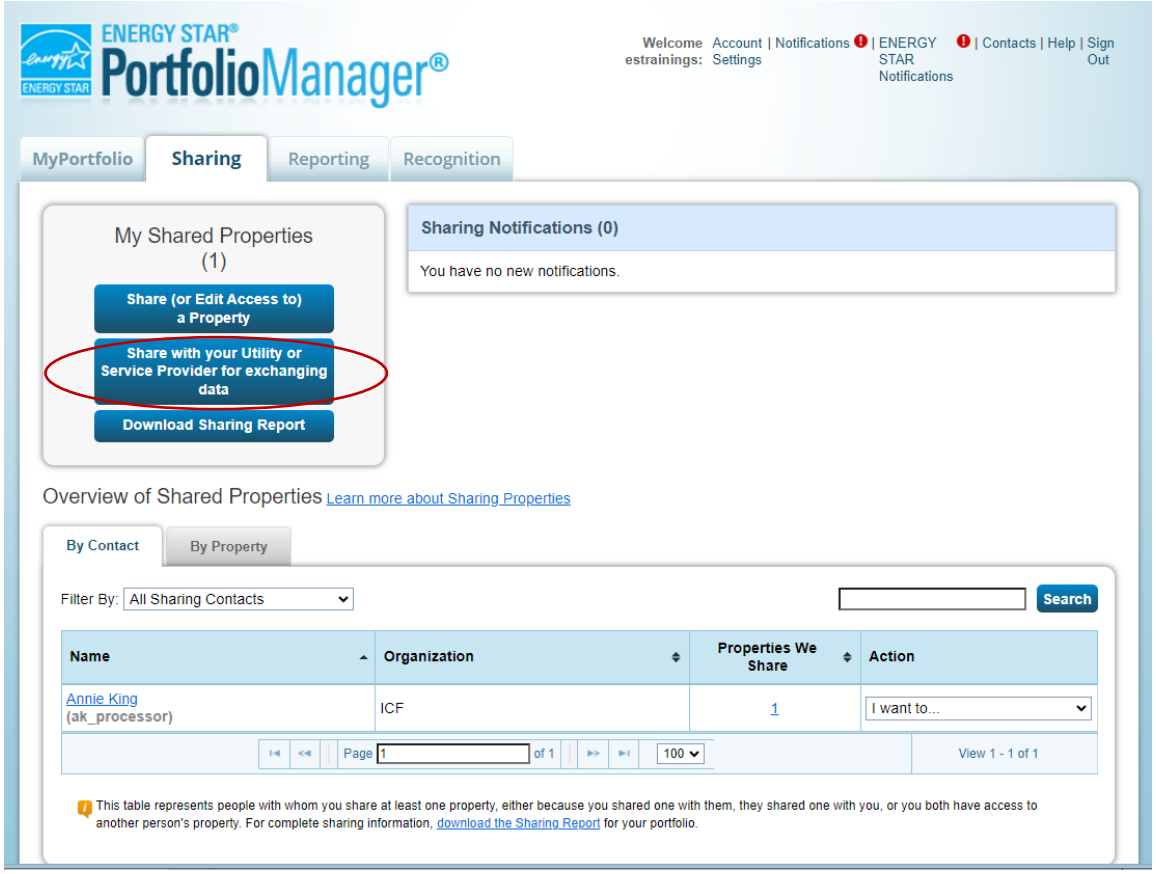
# Click “Send Connection Request”



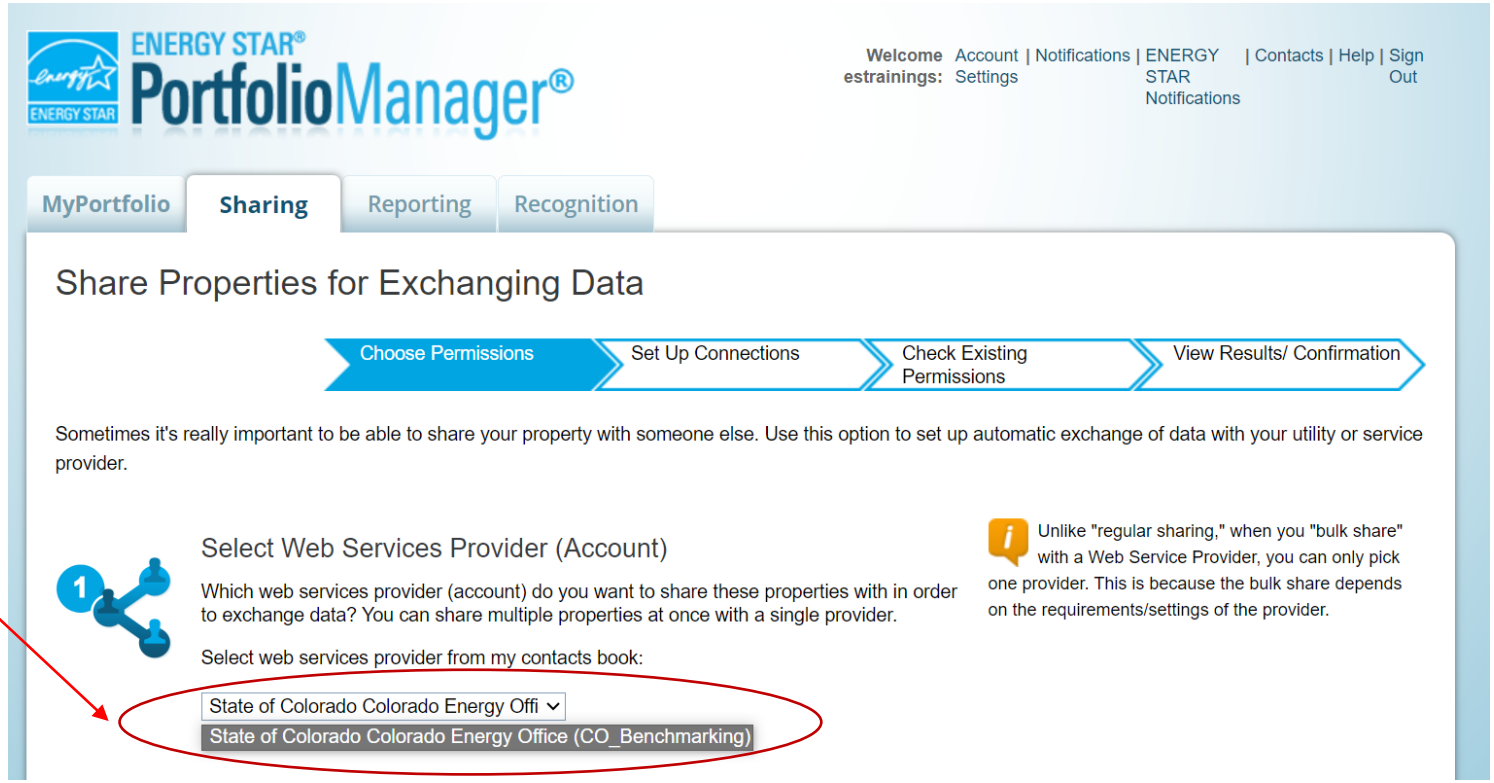
# Click on the Sharing Tab in Portfolio Manager



# Select “Share (or Edit Access to) a Property”

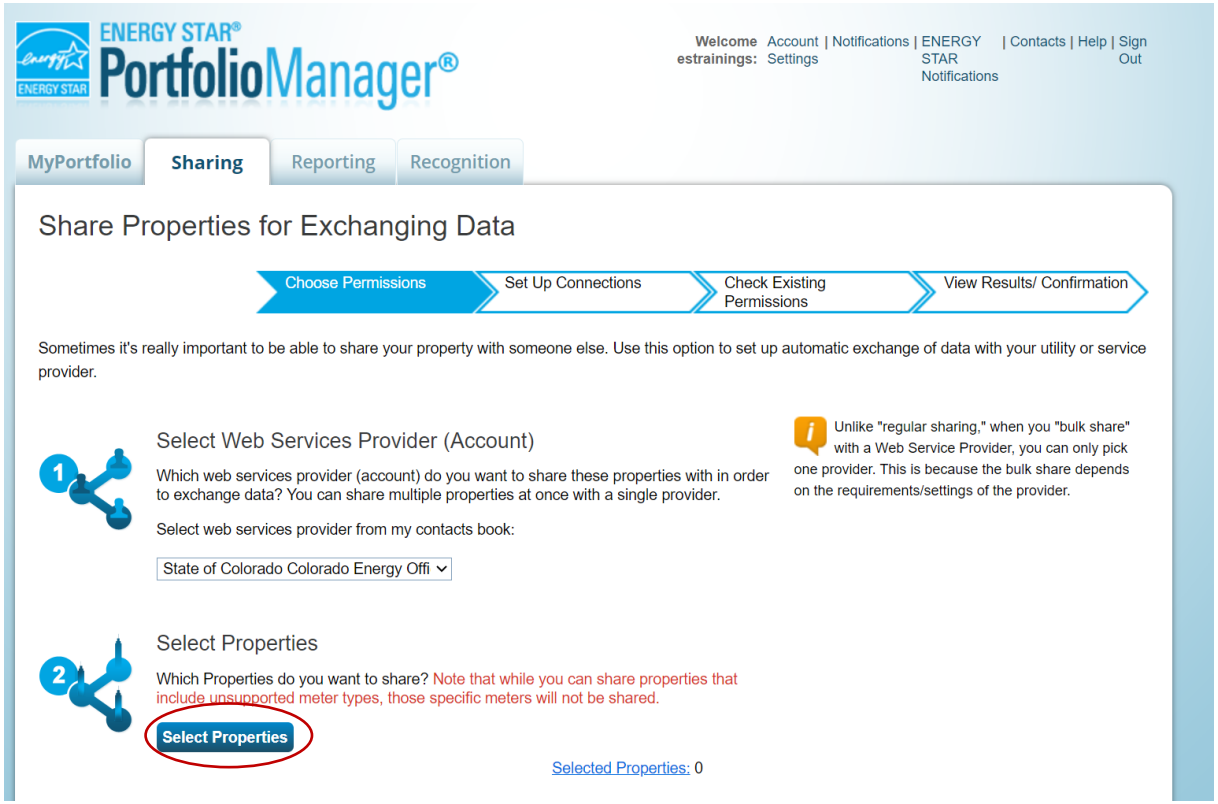


# Select the Contact to Share With




Select the Colorado Energy Office

# Select Properties to share



# Choose Permissions

## Choose Permissions

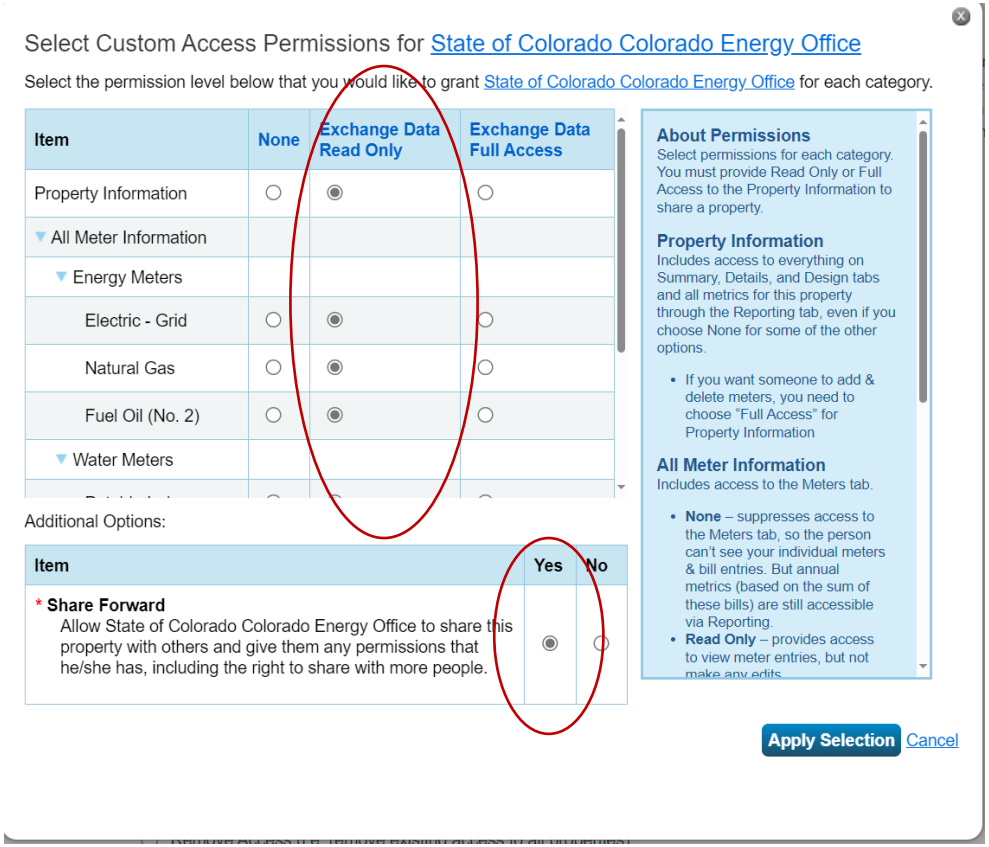
If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- (●) **Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.
  - ( ) Exchange Data Full Access (with full access to all properties and meters)
  - ( ) Exchange Data Read Only Access (with read only access to all properties and meters)
  - ( ) Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)
  - ( ) Remove Access (i.e. remove existing access to all properties)
- ( ) **Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

**Authorize Exchange** Cancel

ENERGY STAR

# Select “Exchange Data” for each property



# Submit share

## Choose Permissions

If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- (●) **Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.
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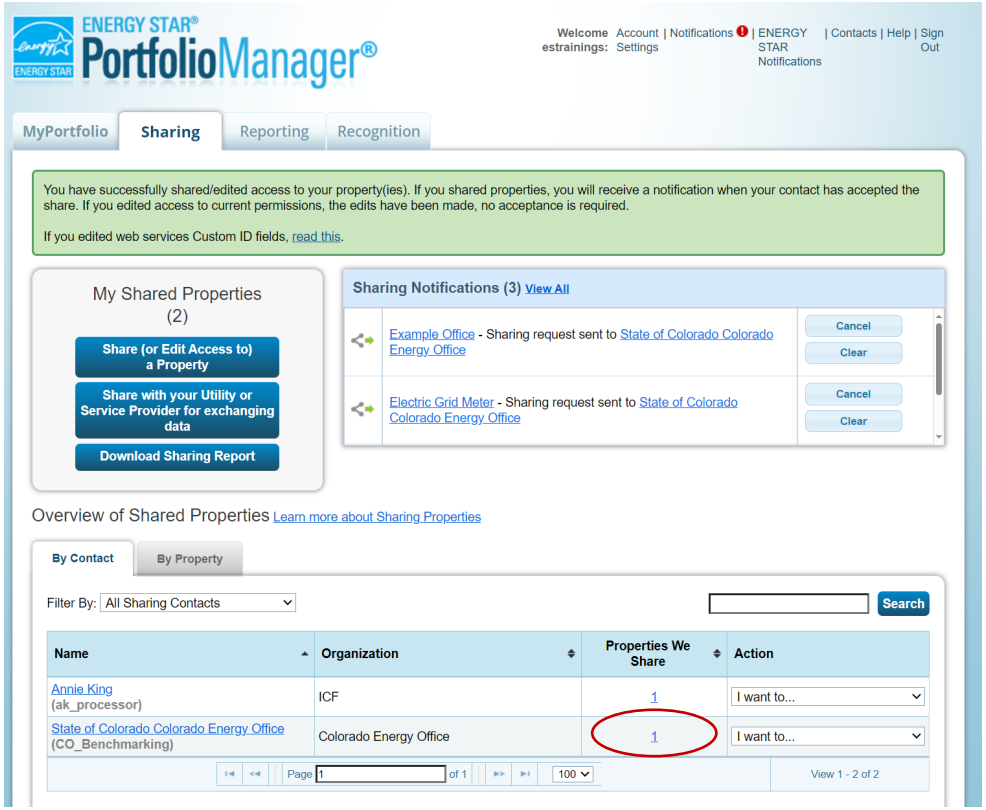
- ( ) **Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

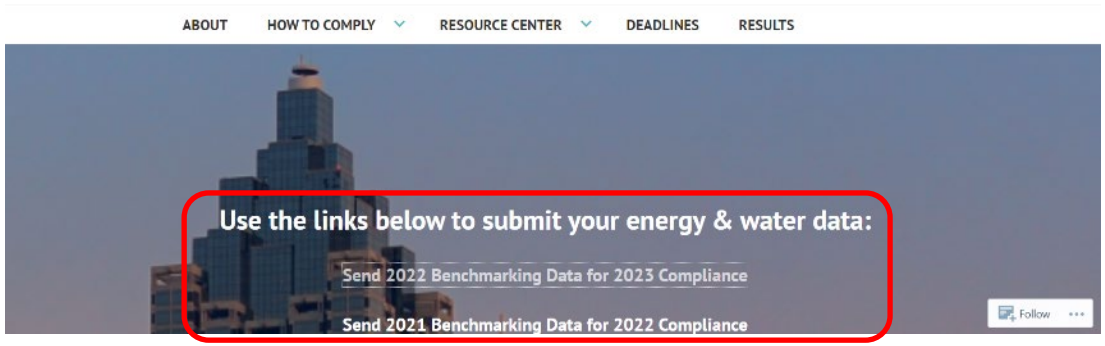
**Authorize Exchange** Cancel

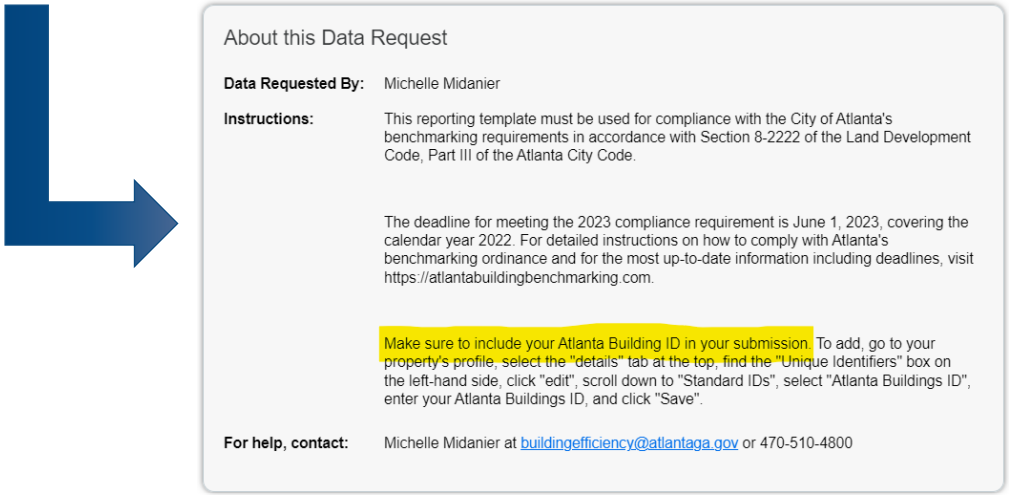
# Confirm that the properties were shared



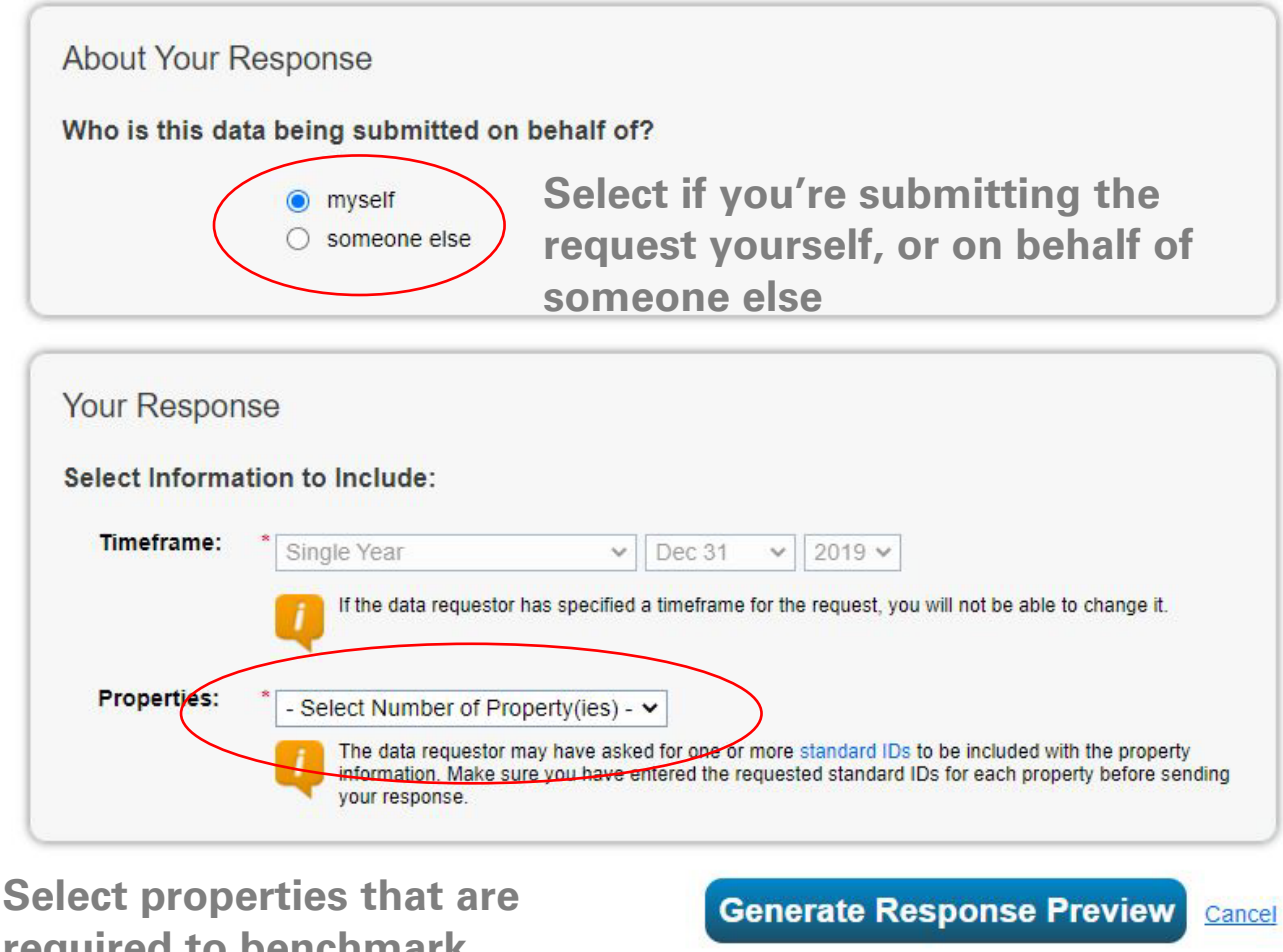
# Data Collection Method 2: Data Request

# Accessing a Data Request



# Accessing a Data Request




**Submitting Data for Someone Else**

Sometimes people delegate their responsibilities for responding to data requests to other people. If you are responding on behalf of someone else, please select their name from your Contacts Book so that they will be attributed to the response.

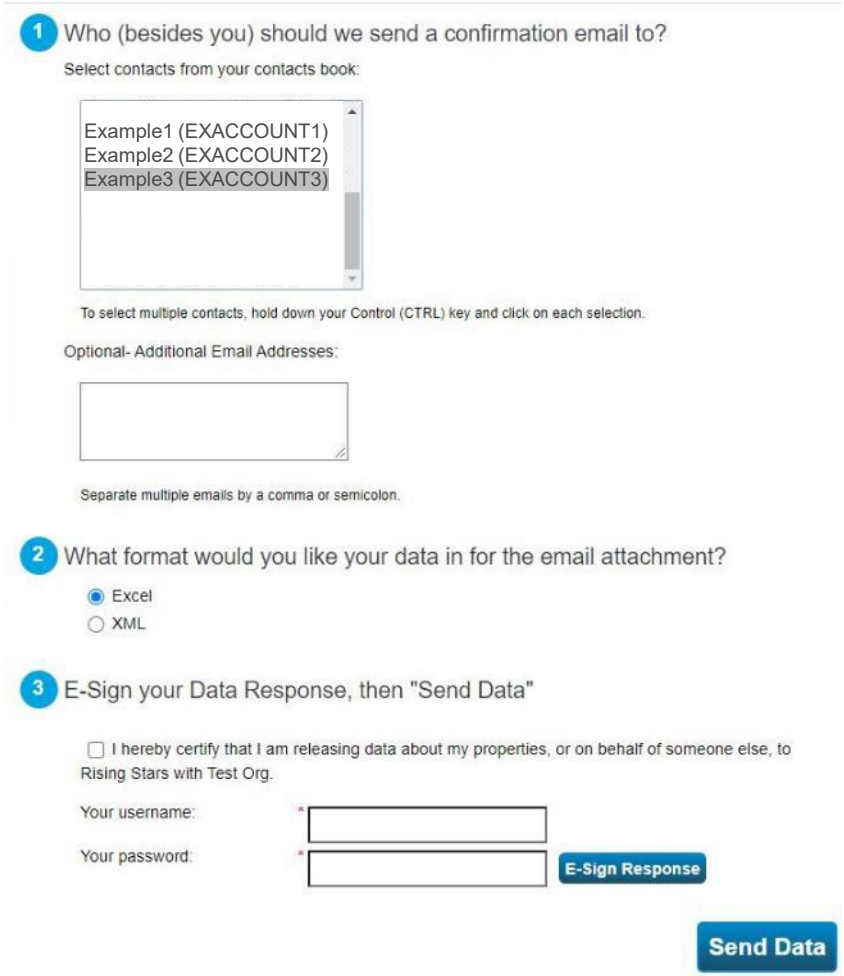
**Previewing Reports**

Making selections here will include specific properties and timeframes in your response. You may preview your response before you send it. However, Portfolio Manager will need to prepare the preview in order for you to view it. Large responses may take more time to prepare. Your response preview will be available from the "Templates & Reports" section on the Reporting tab when it is ready.

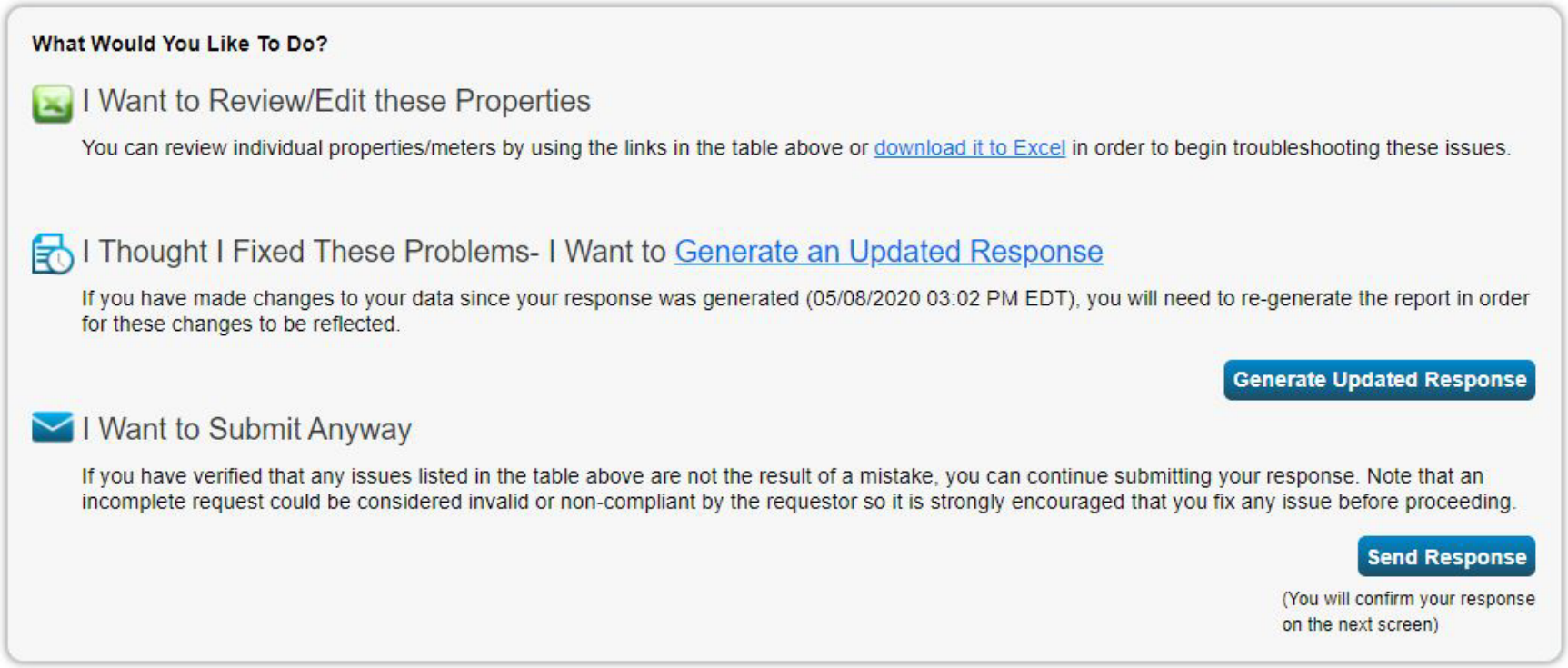
# Preview Your Response

# Preview Your Response

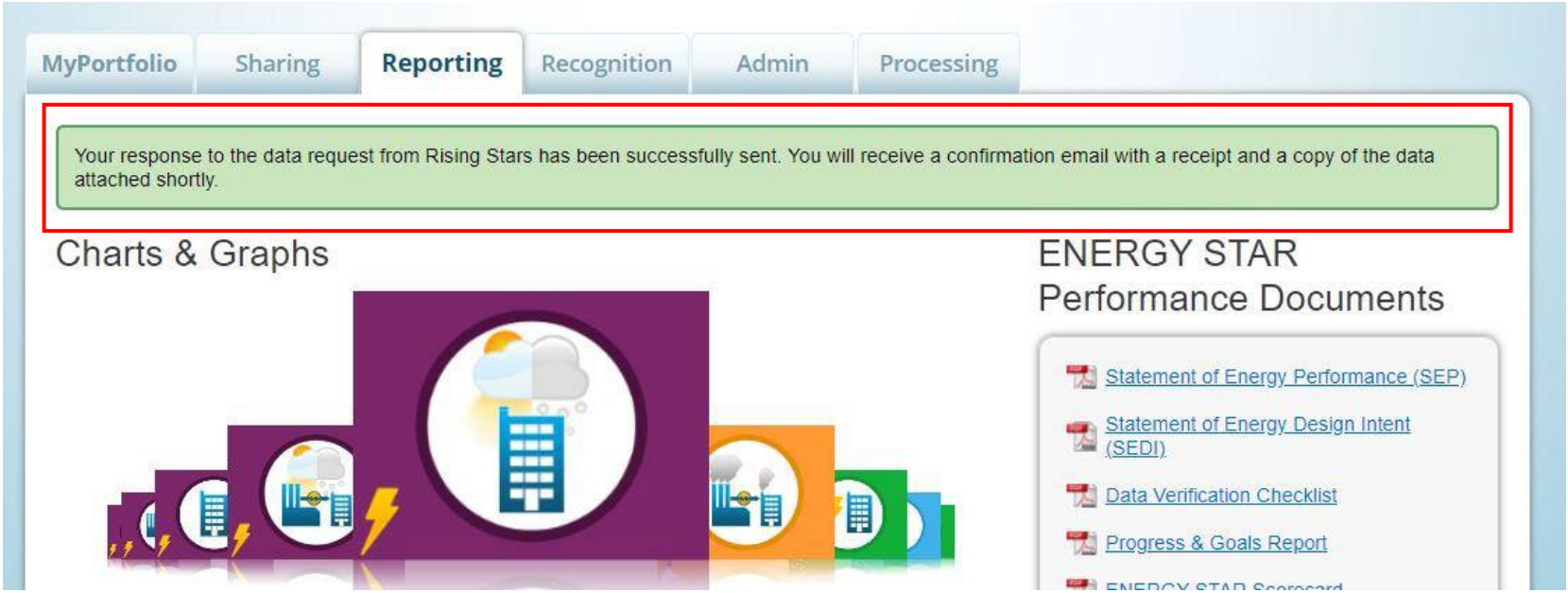
# Send the Response to Complete Compliance



# Send the Response to Complete Compliance



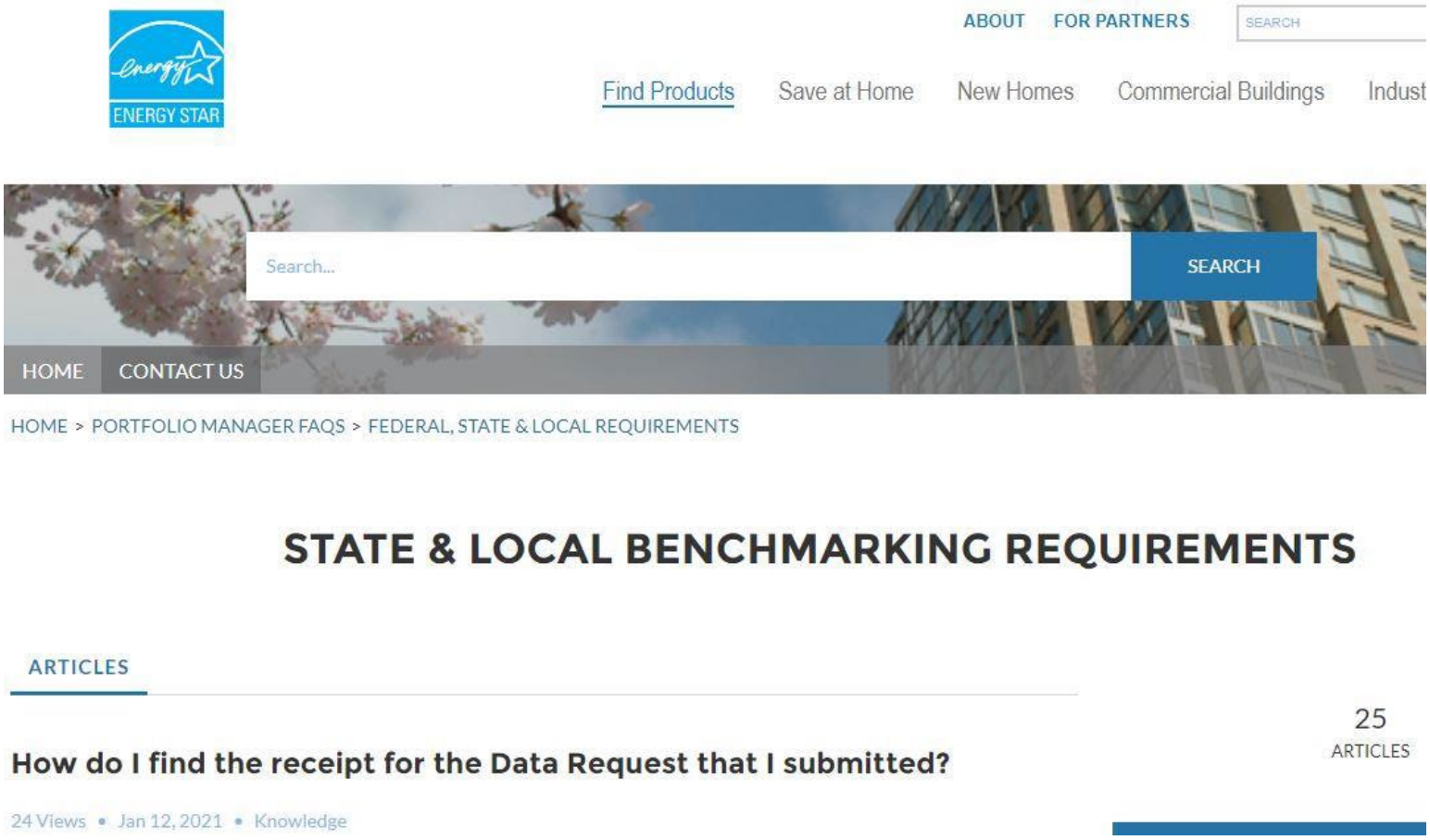
# Send the Response to Complete Compliance



# Benchmarking Law Compliance Resources

- Contacts for state and local benchmarking ordinances:
  - https://energystar-mesa.force.com/PortfolioManager/s/article/Contacts-for-state-local-compliance-ordinances-1600088543441
- Utility data access map: https://energystar.gov/utilitydata
- List of services providers that perform Portfolio Manager benchmarking services:
  - https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/save-energy/expert-help/find-spp/most_active
- Finding your Standard ID:
  - https://energystar-mesa.force.com/PortfolioManager/s/article/Standard-IDs-in-Portfolio-Manager-1600088552120
- How to respond to Data Requests in Portfolio Manager:
  - https://www.energystar.gov/buildings/tools-and-resources/how-respond-data-requests-portfolio-manager
- How to share properties in Portfolio Manager:
  - https://www.energystar.gov/buildings/tools-and-resources/how-share-data-other-users-portfolio-manager

# Benchmarking Law Compliance FAQs




FAQs are available at [www.energystar.gov/buildingshelp](www.energystar.gov/buildingshelp)

# "Basics of Building Benchmarking for Ordinance Compliance" Webinar Series

✓ **Part 1** (register for April 27 session **here**)

*A Beginner's Guide to Using Portfolio Manager for Benchmarking Law Compliance*

- **Register for Part 2 here** (March 28) or **here** (May 10)

*Using Benchmarking Results to Understand your Building's Performance*

- **Register for Part 3 here** (April 4) or **here** (June 8)

*To Efficiency and Beyond! How to Benefit from Benchmarking Compliance with Strategies for Improving your Energy Performance*

**https://www.energystar.gov/buildings/training/complying_ordinances**

# Extra Help

- Visit www.energystar.gov/buildingshelp
  - Extensive list of FAQs
  - Online form to submit technical questions or comments
- Additional Portfolio Manager training resources available at: www.energystar.gov/buildings/training
  - Step-by-step documents (PDF)
  - Access to recorded trainings and short videos
  - Information on upcoming trainings
- Register for regular webinars at: http://esbuildings.webex.com
- Portfolio Manager Technical Reference Series: https://www.energystar.gov/buildings/benchmark/understand_metrics/score_details

Thank you for attending!

# Questions?

**Slides will be sent to all webinar registrants after today's session**

If you have any questions on Portfolio Manager
or the ENERGY STAR program, contact us at:
www.energystar.gov/BuildingsHelp