



Portfolio Manager 201: Editing Property Details, Data Quality Checker, and Sharing Property Data



Learning Objectives

In this session, you will learn about EPA's ENERGY STAR Portfolio Manager tool and how to:

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

Portfolio Manager 101

If you're brand new to using Portfolio Manager, these resources are a good place to start:

- Portfolio Manager 101 webinar
- Portfolio Manager Quick Start Guide
- <https://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-quick-start-guide>

How To

- [Edit property data](#)
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

MyPortfolio

MyPortfolio | Sharing | Reporting | Recognition

Properties (4)

[Add a Property](#)

Source EUI Trend (kBtu/ft²)

[Change Metric](#)

(Chart current as of 05/16/2019 08:29 PM EDT) [Refresh Chart](#)

Manage Portfolio

[Transfer ownership](#) of a property that

Dashboard

(Metrics current as of 05/16/2019 09:30 PM EDT) [Refresh Metrics](#)

View All Properties (4) | Energy Highlights | [Add/Edit/Delete Groups](#) | [Add/Edit/Delete Views](#)

Search by ID or Name

Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft ²)	Source EUI (kBtu/ft ²)
ABC Office Building 6663053	01/31/2019	65	55.4	132.9
Sample K-12 School (US) 6663269	08/31/2018	85	55.1	104.4
Sample Library (US) 6663268	12/31/2017	NA	97.1	206.8
Sample Office (US) 6663253	12/31/2017	26	103.1	250.5

First Previous Page 1 of 1 Next Last 100 View 1 - 4 of 4

[Download Data Table](#)



Edit Property – Basic Information

Summary **Details** Energy Water Waste & Materials Goals Design

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
100,000 Sq. Ft.

Occupancy:
95%

[Edit](#)

Unique Identifiers (IDs)

Portfolio Manager ID:
5941103

Custom IDs: None

Standard IDs: None

You can select from Portfolio Manager's **Standard IDs** to provide information to others in data requests. Or you can create up to three **Custom IDs** so that you can cross reference your property in other systems.

[Edit](#)

Additional Information

Federal Property:
Not Set

Service & Product Provider:
None ([Find a SPP](#))

[Edit](#)

[Delete this Property](#)

Caution! Deleting your property is permanent.


Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft²	I want to...
Property GFA (Buildings):		100,000	(used to calculate EUI)
Property GFA (Parking):		0	

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Property GFA by Use



Office: 100 %

Property Type

Property Type - Self-Selected:
Office [Edit](#)

Property Type - EPA Calculated:
Office

The EPA-Calculated Property Type is used for your metrics. [Learn more about property types.](#)

Property Notes

Use the following area to keep notes on your property.

You have 1000 characters remaining for your notes.

[Save Notes](#)

Edit Property – Basic Information

ENERGY STAR® PortfolioManager™

Welcome | [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Français](#)

MyPortfolio | Sharing | Planning | Reporting

Edit Insurance Office

Address Information

* Name:

* Country:

* Street Address:

* City/Municipality:

* County:

* State/Province:

* Postal Code:

Property Use Detail

* What is the primary function of your property?

Property type defined by Portfolio Manager:
Portfolio Manager considers your property to be this type based on the uses you have entered. If this type doesn't look correct to you, please [edit your use information](#).

How many physical buildings do you consider part of your property?
 None: My property is part of a building
 One: My property is a single building
 More than One: My property includes multiple buildings

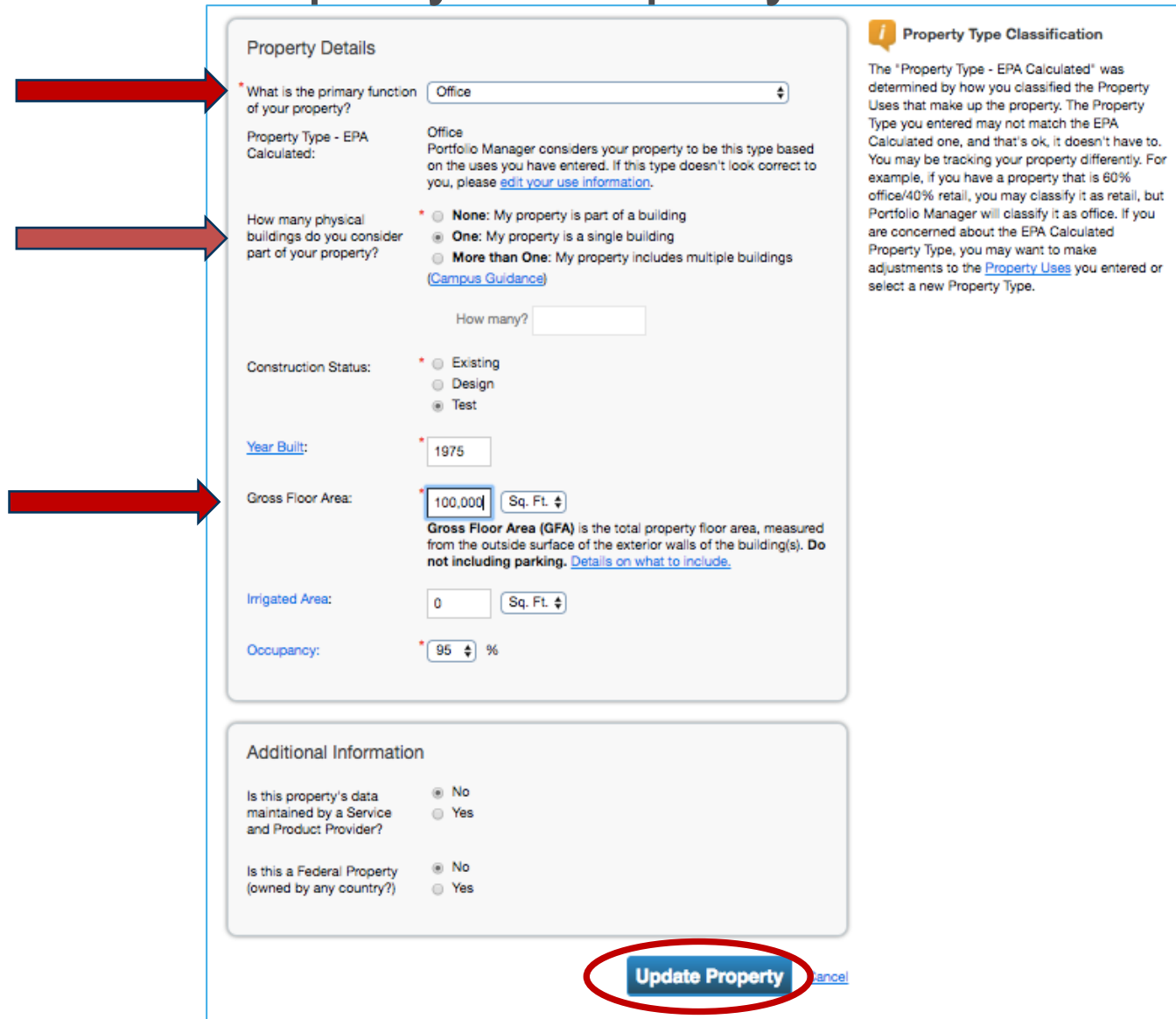
How many?

Property Type Classification

The "Property Type defined by Portfolio Manager" was determined by how you classified the uses that make up the property. The primary function you entered may not match the property type defined by Portfolio Manager. It is not required that these match. You may be tracking your property type differently. For example if you have a property that is 60% office, 40% retail, you may classify it as retail, but Portfolio Manager will classify it as office. If you are concerned about the Portfolio Manager determined property type, you may want to make adjustments to the [uses](#) you entered or select a new primary function for the property.



Edit Property – Property Details



Property Details

* What is the primary function of your property?

Property Type - EPA Calculated: Office
Portfolio Manager considers your property to be this type based on the uses you have entered. If this type doesn't look correct to you, please [edit your use information](#).

How many physical buildings do you consider part of your property?
 None: My property is part of a building
 One: My property is a single building
 More than One: My property includes multiple buildings ([Campus Guidance](#))
How many?

Construction Status:
 Existing
 Design
 Test

[Year Built:](#)

[Gross Floor Area:](#)

Gross Floor Area (GFA) is the total property floor area, measured from the outside surface of the exterior walls of the building(s). Do not include parking. [Details on what to include.](#)

[Irrigated Area:](#)

[Occupancy:](#) %

Additional Information

Is this property's data maintained by a Service and Product Provider?
 No
 Yes

Is this a Federal Property (owned by any country?)
 No
 Yes

Property Type Classification

The "Property Type - EPA Calculated" was determined by how you classified the Property Uses that make up the property. The Property Type you entered may not match the EPA Calculated one, and that's ok, it doesn't have to. You may be tracking your property differently. For example, if you have a property that is 60% office/40% retail, you may classify it as retail, but Portfolio Manager will classify it as office. If you are concerned about the EPA Calculated Property Type, you may want to make adjustments to the [Property Uses](#) you entered or select a new Property Type.

Update Property [Cancel](#)

Tip: Defining Property Use Types

- Identify your property's "Primary Function"
 - Pick the property use that best identifies your building
 - More than 80 property types available
- Add additional property uses only if:
 - It is a property use that can get an ENERGY STAR score
 - It accounts for more than 25% of the property's gross floor area (GFA)
 - It is a vacant/unoccupied Office or Medical Office (and is greater than 10% of the property's GFA)
 - The hours of operation differ by more than 10 hours from the main property use

Example: Adding a Separate Property Use for Vacant Space

Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft²	I want to...

Property GFA (Buildings): **100,000** (used to calculate EUI)
Property GFA (Parking): 0

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Property GFA by Use

Office: 100 %

Property Type

Property Type - Self-Selected: Office [Edit](#)

Property Type - EPA Calculated: Office

The EPA-Calculated Property Type is used for your metrics. [Learn more about property types.](#)

Property Notes

Use the following area to keep notes on your property.

You have 1000 characters remaining for your notes.

Scenario

Office Building with Gross Floor Area = 100,000 sq. ft.

Recently, 10,000 sq. ft. became vacant.

Click “Add” to add another use type (“Office”) to account for vacant space.

Example: Adding a Separate Property Use for Vacant Space

Add Property Use For Eden Park Test Two

Office refers to buildings used for the conduct of commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area (GFA) should include all space within the building(s) including offices, conference rooms and auditoriums, break rooms, kitchens, lobbies, fitness areas, basements, storage areas, stairways, and elevator shafts.

If you have restaurants, retail, or services (dry cleaners) within the Office, you should create a separate Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

- If it is a [Property Use Type that can get an ENERGY STAR Score](#) (note: Retail and Services are not eligible)
- If it accounts for more than 25% of the property's GFA
- If it is a vacant/unoccupied Office
- If the Hours of Operation differ by more than 10 hours from the main Property Use

[More on this rule.](#)

Name:

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	<input type="text" value="0"/> Sq. Ft. <input type="text"/>	<input type="text" value="1/1/1981"/> <input type="text"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text" value="0"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1981"/> <input type="text"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text" value="0"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1981"/> <input type="text"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text" value="0"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1981"/> <input type="text"/>	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1981"/> <input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text" value="50 or more"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1981"/> <input type="text"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

Enter Zero for these Use Details:

- Gross Floor Area = 0
- Weekly Operating Hours = 0
- Number of Workers on Main Shift = 0
- Number of Computers = 0



Example: Adding a Separate Property Use for Vacant Space

The screenshot displays a software interface for property management, specifically the 'Details' tab. The interface is divided into several sections:

- Basic Information:** Construction Status (Test property that is one single building), Property GFA - Self-Reported (100,000 Sq. Ft.), and Occupancy (95%).
- Unique Identifiers (IDs):** Portfolio Manager ID (5941103), Custom IDs (None), and Standard IDs (None). A note explains that users can select from Portfolio Manager's Standard IDs or create up to three Custom IDs for cross-referencing.
- Additional Information:** Federal Property (Not Set) and Service & Product Provider (None).
- Property Uses and Use Details:** A table with columns for Name, Property Use Type, Gross Floor Area, and Action. It lists 'Building Use' (Office, 100,000 ft²) and 'Vacant Office Use' (Office, 0 ft²). A red circle highlights this table and the 'Add Another Type of Use' button above it.
- Property GFA by Use:** A pie chart showing 100% Office.
- Property Type:** Property Type - Self-Selected (Office) and Property Type - EPA Calculated (Office). A note states that the EPA-Calculated Property Type is used for metrics.
- Property Notes:** A text area for keeping notes on the property.

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft²	I want to...
▶ Vacant Office Use	Office	0 ft²	I want to...

Property GFA (Buildings): 100,000 (used to calculate EUI)
Property GFA (Parking): 0

How To

- Edit property data
- [Correct or update property use details](#)
- Use the Data Quality Checker
- Share property data

Correct vs. Update

- If you need to make edits to your property use details, you can either “Correct Mistakes” or “Update with New Information”
- “Correct Mistakes” changes a value that was entered in error
 - No historical record of the old value will be kept or factored into your metrics
- “Update with New Information” tracks a value that is changing over time
 - Enter date as of which the new value took effect, so that the tool can account for this when calculating “time-weighted” metrics

Edit Property – Update with New Information


Scenario

10,000 sq. ft.
of space is
vacated

Property Uses and Use Details

[View as Diagram](#)

Name	Primary Function	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft ²	I want to... <input type="button" value="▼"/>
▶ Vacant Office Space	Office	0 ft ²	I want to... <input type="button" value="▼"/>
Property GFA (Buildings):		100,000 (used)	<input type="button" value="I want to..."/> <input type="button" value="Update with New Information"/> <input type="button" value="View Update History"/> <input type="button" value="Correct Mistakes"/> <input type="button" value="Delete use"/>
Property GFA (Buildings and Parking):		100,000	

 To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.



Edit Property – Update with New Information

Update Property Use Details

It is important to keep the information about how your property is used up to date since this information is used to calculate your performance metrics. Updates that you make here are tracked as part of the [History Log](#). To correct an error that you find, use the [History Log](#). Note: you do not need to provide any new information for details you aren't updating.

Property Use Name: *

Type of Use: Office

Detail	Current Value	Updated Value	Current As Of	Temporary Value
★ Gross Floor Area	0 Sq. Ft. (as of 01/01/1981)	<input type="text" value="10,000"/> Sq. Ft. <input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>
★ Weekly Operating Hours	0 (as of 01/01/1981)	<input type="text" value=""/> <input type="checkbox"/> Use a default	<input type="text" value=""/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	0 (as of 01/01/1981)	<input type="text" value=""/> <input type="checkbox"/> Use a default	<input type="text" value=""/>	<input type="checkbox"/>
★ Number of Computers	0 (as of 01/01/1981)	<input type="text" value=""/> <input type="checkbox"/> Use a default	<input type="text" value=""/>	<input type="checkbox"/>
Percent That Can Be Heated	50 % or more (as of 01/01/1981)	<input type="text" value=""/> <input type="checkbox"/> Use a default	<input type="text" value=""/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	50 % or more (as of 01/01/1981)	<input type="text" value=""/> <input type="checkbox"/> Use a default	<input type="text" value=""/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

🗨 If your property has more than one building, you need to update your Property Use Details (# Workers, Weekly Operating Hours of operation) for both the parent property (campus) and the child properties. It is not done automatically. [Learn more about keeping Use Details up to date](#)

[Cancel](#)

Edit Property – Update with New Information

The screenshot displays the 'Details' tab of a property management interface. The left sidebar contains sections for 'Basic Information', 'Unique Identifiers (IDs)', and 'Additional Information'. The main content area is divided into 'Property Uses and Use Details' and 'Property Type'. The 'Property Uses and Use Details' section features a table with columns for Name, Property Use Type, Gross Floor Area, and Action. A table below the main table shows summary statistics for Property GFA. The 'Property Type' section includes a pie chart for 'Property GFA by Use' and text for 'Property Type - Self-Selected' and 'Property Type - EPA Calculated'. A 'Property Notes' section is at the bottom.

Basic Information
Construction Status: Test property that is one single building
Property GFA - Self-Reported: 100,000 Sq. Ft.
Occupancy: 95% [Edit](#)

Property Uses and Use Details
[View as Diagram](#) Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft²	I want to...
▶ Vacant Office Use	Office	10,000 ft²	I want to...

Property GFA Summary
Property GFA (Buildings): **110,000 (used to calculate EU)**
Property GFA (Parking): 0

Property Type
Property Type - Self-Selected: Office [Edit](#)
Property Type - EPA Calculated: Office
The EPA-Calculated Property Type is used for your metrics. [Learn more about property types.](#)

Property GFA by Use
Office: 100 %

Additional Information
Federal Property: Not Set
Service & Product Provider: None [Find a SPP](#) [Edit](#)

Property Notes
Use the following area to keep notes on your property.

Edit Property – Update with New Information

Update Property Use Details

It is important to keep the information about how your property is used up to date since this information is used to calculate your performance metrics. Updates that you make here are tracked as part of the [History Log](#). To correct an error that you find, use the [History Log](#). Note: you do not need to provide any new information for details you aren't updating.

Property Use Name: *

Type of Use: [Office](#)

Detail	Current Value	Updated Value	Current As Of	Temporary Value
★ Gross Floor Area	100000 Sq. Ft. (as of 01/01/1981)	<input type="text" value="90,000"/> Sq. Ft. <input type="button" value="v"/>	<input type="text"/> <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Weekly Operating Hours	65 (as of 01/01/1981)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/> <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	140 (as of 01/01/1981)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/> <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Number of Computers	140 (as of 01/01/1981)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/> <input type="button" value="calendar"/>	<input type="checkbox"/>
Percent That Can Be Heated	50 % or more (as of 01/01/1981)	<input type="text"/> <input type="button" value="v"/> <input type="checkbox"/> Use a default	<input type="text"/> <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	50 % or more (as of 01/01/1981)	<input type="text"/> <input type="button" value="v"/> <input type="checkbox"/> Use a default	<input type="text"/> <input type="button" value="calendar"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

📌 If your property has more than one building, you need to update your Property Use Details (# Workers, Weekly Operating Hours of operation) for both the parent property (campus) and the child properties. It is not done automatically. [Learn more about keeping Use Details up to date](#)

[Cancel](#)



Edit Property – Update with New Information

Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use

Name	Property Use Type	Gross Floor Area	Action	
▼ Office	Office	97,479 ft ²	I want to... ▼	
		Value	Current As Of	Temporary Value?
★ Gross Floor Area		90000 ft ²	05/01/2018	No
★ Weekly Operating Hours		65	01/01/1981	No
★ Number of Workers on Main Shift		140	01/01/1981	No
★ Number of Computers		140	01/01/1981	No
Percent That Can Be Heated		50 % or more	01/01/1981	No
★ Percent That Can Be Cooled		50 % or more	01/01/1981	No
★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.				
▼ Vacant Space	Office	2,521 ft ²	I want to... ▼	
		Value	Current As Of	Temporary Value?
★ Gross Floor Area		10000 ft ²	05/01/2018	No

Updated
Gross Floor Area

Updated
Gross Floor Area



Edit Property – Update with New Information

The screenshot displays the 'Edit Property' interface with the following sections:

- Summary** (selected), Details, Energy, Water, Waste & Materials, Goals, Design
- Basic Information**: Construction Status (Test property that is one single building), **Property GFA - Self-Reported: 100,000 Sq. Ft.** (circled in red), Occupancy: 95% (with Edit button).
- Unique Identifiers (IDs)**: Portfolio Manager ID: 5941103, Custom IDs: None, Standard IDs: None. Includes a note about selecting IDs and an Edit button.
- Additional Information**: Federal Property: Not Set, Service & Product Provider: None (with Find a SPP link and Edit button).
- Property Uses and Use Details**: View as Diagram, Add Another Type of Use (dropdown), Add button. Table below:

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	90,000 ft²	I want to...
▶ Vacant Office Use	Office	10,000 ft²	I want to...

Property GFA (Buildings): **100,000** (used to calculate EUI) (circled in red)
Property GFA (Parking): 0

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.
- Property GFA by Use**: Pie chart showing Office: 100%.
- Property Type**: Property Type - Self-Selected: Office (with Edit button), Property Type - EPA Calculated: Office. Includes a note about EPA-Calculated Property Type and a link to learn more.
- Property Notes**: Use the following area to keep notes on your property. (Empty text box)


Example of a property accurately set up, accounting for vacant space

Edit Property – Correct Mistakes


Scenario

Incorrect sq. ft.
for vacant
space entered

Property Uses and Use Details

 [View as Diagram](#)

Name	Primary Function	Gross Floor Area	Action
▶ Building Use	Office	98,329 ft ²	I want to...
▶ Vacant Office Space	Office	1,671 ft ²	I want to...
Property GFA (Buildings):		100,000 (used f	I want to... Update with New Information View Update History Correct Mistakes Delete use
Property GFA (Buildings and Parking):		100,000	





Edit Property – Correct Mistakes

History Log for Vacant Office Space


Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (campus), you need to [update these Property Use Details in BOTH the parent and child properties.](#)

★ Gross Floor Area

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	08/01/2015  (to present)	20000 <input type="text"/> Sq. Ft. <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015
<input type="checkbox"/>	01/01/1985  (through 7/31/2015)	0 <input type="text"/> Sq. Ft. <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015


 [Delete Selected Entries](#)

★ Weekly Operating Hours

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/1985  (to present)	0 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015

 [Delete Selected Entries](#)

★ Number of Workers on Main Shift

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/1985  (to present)	0 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015

 [Delete Selected Entries](#)

Save Corrections

Edit Property – Correct Mistakes

The screenshot shows the 'Details' tab of a property management interface. The left sidebar contains sections for Basic Information, Unique Identifiers (IDs), and Additional Information. The main content area is titled 'Property Uses and Use Details' and includes a table of property uses, a pie chart for 'Property GFA by Use', and a 'Property Type' section.

Basic Information:

- Construction Status: Test property that is one single building
- Property GFA - Self-Reported: 100,000 Sq. Ft.** (Circled in red)
- Occupancy: 95%

Property Uses and Use Details:

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	90,000 ft²	I want to...
▶ Vacant Office Use	Office	20,000 ft²	I want to...
Property GFA (Buildings): 110,000 (used to calculate EUI)			
Property GFA (Parking): 0			

Property GFA by Use:

- Office: 100 %

Property Type:



- Property Type - Self-Selected: Office
- Property Type - EPA Calculated: Office

Edit Property – Correct Mistakes

History Log for Building Use



Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (campus), you need to [update these Property Use Details in BOTH the parent and child properties](#).

★ Gross Floor Area

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	08/01/2015  (to present)	80000 <input type="text"/> Sq. Ft. <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015
<input type="checkbox"/>	01/01/1985  (through 7/31/2015)	100000 <input type="text"/> Sq. Ft. <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015



 [Delete Selected Entries](#)

★ Weekly Operating Hours

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	08/01/2015  (to present)	55 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015
<input type="checkbox"/>	01/01/1985  (through 7/31/2015)	65 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015

 [Delete Selected Entries](#)

★ Number of Workers on Main Shift

<input type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	08/01/2015  (to present)	200 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015
<input type="checkbox"/>	01/01/1985  (through 7/31/2015)	229 <input type="text"/>	<input type="checkbox"/>	Eric	10/16/2015

Save Corrections

Edit Property – Correct Mistakes

Property Uses and Use Details

[View as Diagram](#)

Name	Primary Function	Gross Floor Area	Action
▼ Building Use	Office	96,658 ft ²	I want to... ▼
	Value	Current As Of	Temporary Value?
Gross Floor Area	80000 ft ²	08/01/2015	No
Weekly Operating Hours	55	08/01/2015	No
Number of Workers on Main Shift	200	08/01/2015	No
Number of Computers	200	08/01/2015	No
Percent That Can Be Heated	50 % or more	08/01/2015	No
Percent That Can Be Cooled	50 % or more	08/01/2015	No
▼ Vacant Office Space	Office	3,342 ft ²	I want to... ▼
	Value	Current As Of	Temporary Value?
Gross Floor Area	20000 ft ²	08/01/2015	No
Weekly Operating Hours	0	01/01/1985	No
Property GFA (Buildings):		100,000	(used to calculate EUI)
Property GFA (Buildings and Parking):		100,000	

Edit Property – Correct Mistakes

The screenshot shows the 'Edit Property' interface with the following sections:

- Summary** (selected tab)
- Details** (tab)
- Energy** (tab)
- Water** (tab)
- Waste & Materials** (tab)
- Goals** (tab)
- Design** (tab)

Basic Information

- Construction Status:** Test property that is one single building
- Property GFA - Self-Reported:** 100,000 Sq. Ft. (circled in red)
- Occupancy:** 95% [Edit](#)

Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	80,000 ft²	I want to...
▶ Vacant Office Use	Office	20,000 ft²	I want to...

Property GFA (Buildings): 100,000 (used to calculate EUI) (circled in red)
Property GFA (Parking): 0

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Unique Identifiers (IDs)

- Portfolio Manager ID:** 5941103
- Custom IDs:** None
- Standard IDs:** None
- You can select from Portfolio Manager's **Standard IDs** to provide information to others in data requests. Or you can create up to three **Custom IDs** so that you can cross reference your property in other systems. [Edit](#)

Additional Information

- Federal Property:** Not Set
- Service & Product Provider:** None ([Find a SPP](#)) [Edit](#)

Property GFA by Use

Property Type

- Property Type - Self-Selected:** Office [Edit](#)
- Property Type - EPA Calculated:** Office
- The EPA-Calculated Property Type is used for your metrics. [Learn more about property types.](#)

Property Notes

Use the following area to keep notes on your property.

Correcting/Updating Properties with Multiple Buildings (Campuses)

- When you have a property set up as a campus (e.g., “child” buildings that comprise a “parent” property), you will need to update/correct use details at both the building and property levels.
- If you make a change at the building level, it will not automatically “roll up” to the property level

Pop Quiz!

1. If you are editing your building record to indicate that the total number of building occupants had increased, you would use which of the following options?
 - A. Correct mistakes
 - B. Update with new information

2. If you are editing your building record because you had entered 10,000 ft² of floorspace instead of 100,000 ft², you would use which of the following options?
 - A. Correct mistakes
 - B. Update with new information

3. True or False: in a multi-tenant office building, you would enter each tenant as a separate property use within the building record.
 - A. True
 - B. False

Pop Quiz!

1. If you are editing your building record to indicate that the total number of building occupants had increased, you would use which of the following options?

- A. Correct mistakes
- B. Update with new information

An increase in building occupants is a meaningful change in a property use detail over time. You would want to treat this as an “update” so that Portfolio Manager can use the correct occupant count to calculate metrics before and after the change.

2. If you are editing your building record because you had entered 10,000 ft² of floorspace instead of 100,000 ft², you would use which of the following options?

- A. Correct mistakes
- B. Update with new information

Fixing a number you entered incorrectly doesn’t require a timestamp. You do not want the tool to use the incorrect value; you just want to correct it.

3. True or False: in a multi-tenant office building, you would enter each tenant as a separate property use within the building record.

- A. True
- B. False

In general, you should enter as few property use types as possible when setting up a property. You should benchmark the all of the floorspace within this property as a single “Office” entry unless any of the special cases on slide 9 are in place at your building. Only in that case would you break out the affected spaces as separate line items for property use.

How To

- Edit property data
- Correct or update property use details
- [Use the Data Quality Checker](#)
- Share property data

Address Data Quality Alerts

- Portfolio Manager includes built-in features to help users input data correctly, such as:
 1. Alerts
 2. Tips
 3. Easily accessible definitions
- Intended to help catch common data entry mistakes

Gross Floor Area Alert

The screenshot shows a software interface with tabs for Summary, Details, Energy, Water, Waste & Materials, Goals, and Design. The 'Details' tab is active. On the left, under 'Basic Information', the 'Property GFA - Self-Reported' is listed as 100,000 Sq. Ft. On the right, under 'Property Uses and Use Details', a table lists two uses: 'Building Use' (Office, 100,000 ft²) and 'Vacant Office Use' (Office, 10,000 ft²). Below the table, a summary row shows 'Property GFA (Buildings): 110,000 (Used to calculate EUI)'. Red circles and arrows highlight the original GFA value and the updated total GFA value.

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft²	I want to...
▶ Vacant Office Use	Office	10,000 ft²	I want to...

Property GFA (Buildings): 110,000 (Used to calculate EUI)

Gross Floor Area originally entered as 100,000 sq. ft. for this property


When “Vacant Space” was added, the Gross Floor Area went up to 110,000 sq. ft.


Edit primary building GFA to equal 90,000 sq. ft, to keep total floor area consistent

Meter Data Alerts

Manage Bills (Meter Entries) for [Supermarket A-1](#)

You may select one of your meters to get started. Or, if you are coming here from your meter list, a meter may already be selected.


 Electricity has an overlap where 09/01/2005 precedes 05/03/2006. Please remove the overlap by adjusting the dates of your energy bills. For help, see this [FAQ](#).

 Electricity has a gap of 35 days between the dates of 11/30/2005 and 01/05/2006. Please close the gap by adjusting the dates of your energy bills. For help, see this [FAQ](#).


Electricity

Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost (\$)	Estimation	Green Power	Last Updated
<input type="checkbox"/>	4/5/2005	5/3/2006	366,720		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 facciolo

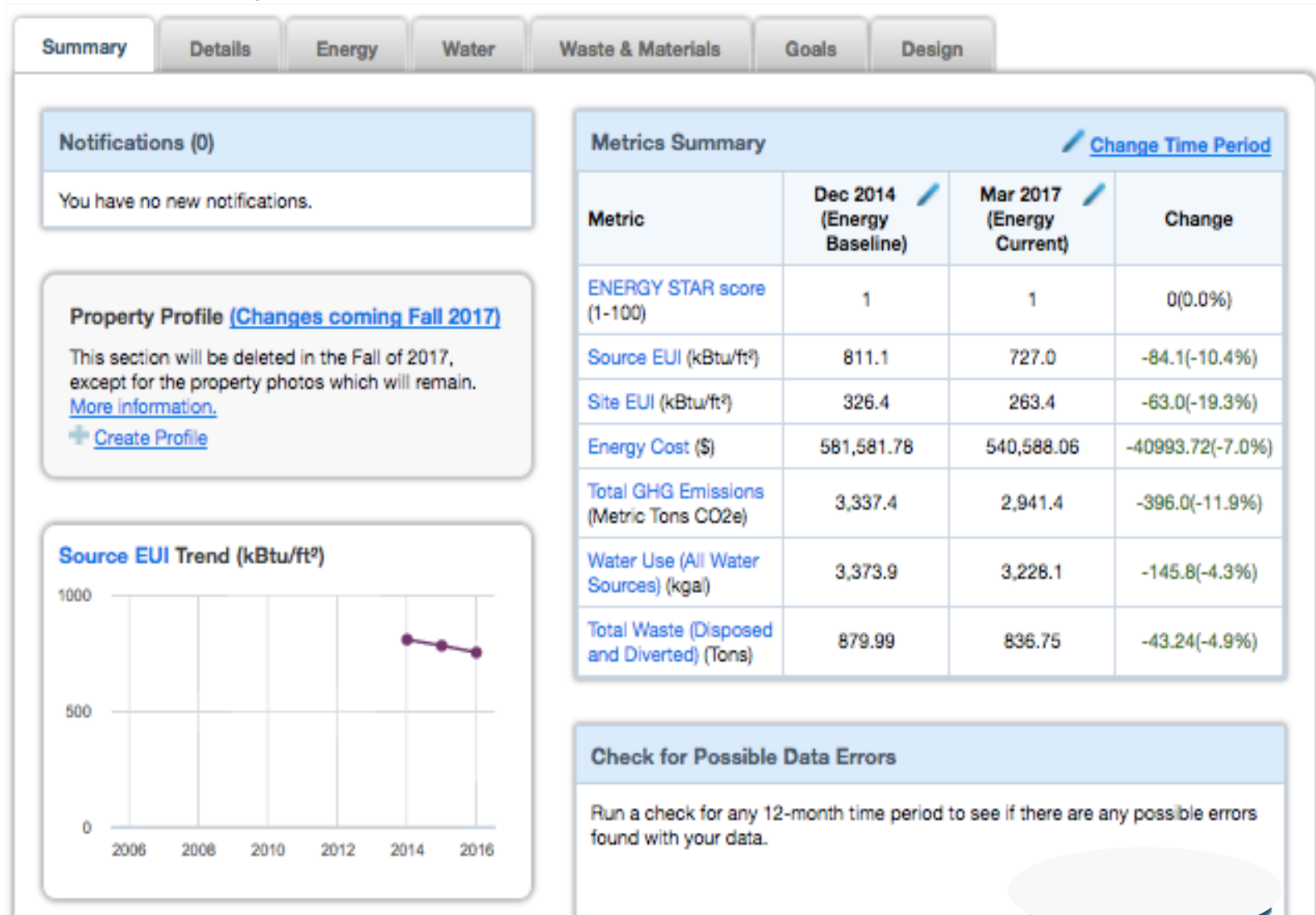
 Electricity has an overlap where 09/01/2005 precedes 05/03/2006. Please remove the overlap by adjusting the dates of your energy bills. For help, see this [FAQ](#).

<input type="checkbox"/>	9/1/2005	9/30/2005	427,920		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 facciolo
<input type="checkbox"/>	10/1/2005	10/31/2005	369,840		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 facciolo
<input type="checkbox"/>	11/1/2005	11/30/2005	384,960		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 facciolo

 Electricity has a gap of 35 days between the dates of 11/30/2005 and 01/05/2006. Please close the gap by adjusting the dates of your energy bills. For help, see this [FAQ](#).

<input type="checkbox"/>	1/5/2006	2/3/2006	354,960		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 facciolo
<input type="checkbox"/>	2/4/2006	3/6/2006	357,360		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 facciolo

Data Quality Checker



Data Quality Checker

MyPortfolio

Sharing

Reporting

Recognition

Data Quality Checker for [Portfolio Manager 201 Sample Building](#)

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your year of interest, review your alerts, and follow the links to view or correct your data as needed.

Select Timeframe & Run Checker

We check data for a full year (12 months) of meter consumption and Property Use Details (called a [Metric Year](#)). Select a [Year Ending Date](#) and click "run checker" to see possible data issues.

Year Ending:

*

[Re-Run Checker](#)



Congratulations! We did not find any incomplete or unusual data for the Metric Year ending 11/30/2021.

[Cancel](#)



About Timeframes

The Data Quality Checker needs one full calendar year of [Property Use Details](#) and [meter](#) information for most checks. Otherwise, we will show you basic alerts to let you know what's missing.

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Pop Quiz!

4. The Data Quality Checker does all of the following except:
- A. Identifies erroneous or anomalous data
 - B. Reviews all entries for an individual property for a given 12-month period
 - C. Fixes any data errors at your property
 - D. Runs the same checks used during the ENERGY STAR Certification process

Pop Quiz!

4. The Data Quality Checker does all of the following except:
- A. Identifies erroneous or anomalous data
 - B. Reviews all entries for an individual property for a given 12-month period
 - C. Fixes any data errors at your property
 - D. Runs the same checks used during the ENERGY STAR Certification process

The Data Quality Checker will alert you to potentially erroneous data, but it will not fix it for you. You will need to fix the item(s) in question, using the guidance provided by the Checker.

How To

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- [Share property data](#)

2 Steps to Sharing Properties

1. Confirm you are connected to the person you want to share with on the Contacts page. If needed, send a connection request by clicking on “Add Contact”
2. Share one or more of your properties with your connected contacts and specify the level of access the contacts will be granted to view and/or edit your properties

Note: You can reference the 5-minute video, “How to Share Properties in Portfolio Manager” at www.energystar.gov/buildings/training as a refresher, if needed.

Add and Connect with Contacts

Welcome gracevinsons: [Account Settings](#) **Contacts** | [Help](#) | [Sign Out](#)

MyPortfolio | [Sharing](#) | [Reporting](#) | [Recognition](#)

My Contacts and Organizations

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.

Contacts | [Organizations](#)

Search existing contacts

Add New Contacts/Connections

<input type="checkbox"/>	Name (title)	Organization	Connection Status	Username
<input type="checkbox"/>	Alice Bell Energy and Sustainability Researcher	ICE	Connected	PM101Demo
<input type="checkbox"/>	Rosemary Wallace Energy & Sustainability Researcher	ICE	Connected	RW_Processor
<input type="checkbox"/>	Sky_Scraper	201 Inc	Not connected	
<input type="checkbox"/>	Sky_Scraper	201 Inc	Not connected	
<input type="checkbox"/>	Sky_Scraper	201 Inc	Not connected	

First Previous Page 1 of 1 Next Last 25

1 - 5 of 5

[Delete selected entries](#) [Download all contact information](#)

[Share properties with selected connected contacts](#)

Find Contacts

MyPortfolio Sharing Reporting Recognition

Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account. If you find the person, send a Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact you would like to add does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:

Organization:

Username:

Email:

[Cancel](#)

i Connecting with Other Users

If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily [share your property](#) information with your contacts.

.....

i Keeping Personal Contacts

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

.....

i Organizing Personal Contacts by

Send Connection Request to Contact

MyPortfolio Sharing Reporting Recognition

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria


Name:

Organization:

Username:

Email Address:

Search

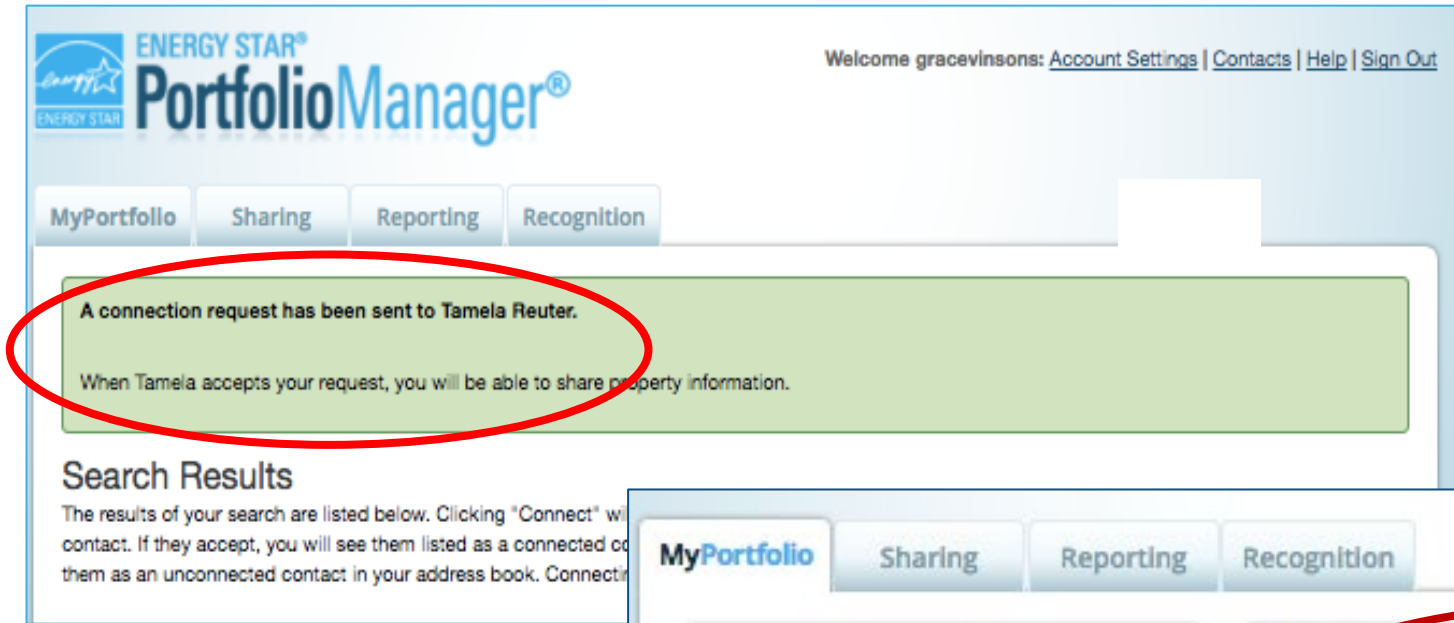
 Tamela Reuter
Consultant with The Clark Group, LLC

Connect

Page 1 of 1 50 1 - 1 of 1

i **Tip**
Can't find what you are looking for? Try adjusting your search criteria.

Connection Request Confirmed



ENERGY STAR®
PortfolioManager®

Welcome gracevinsons: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

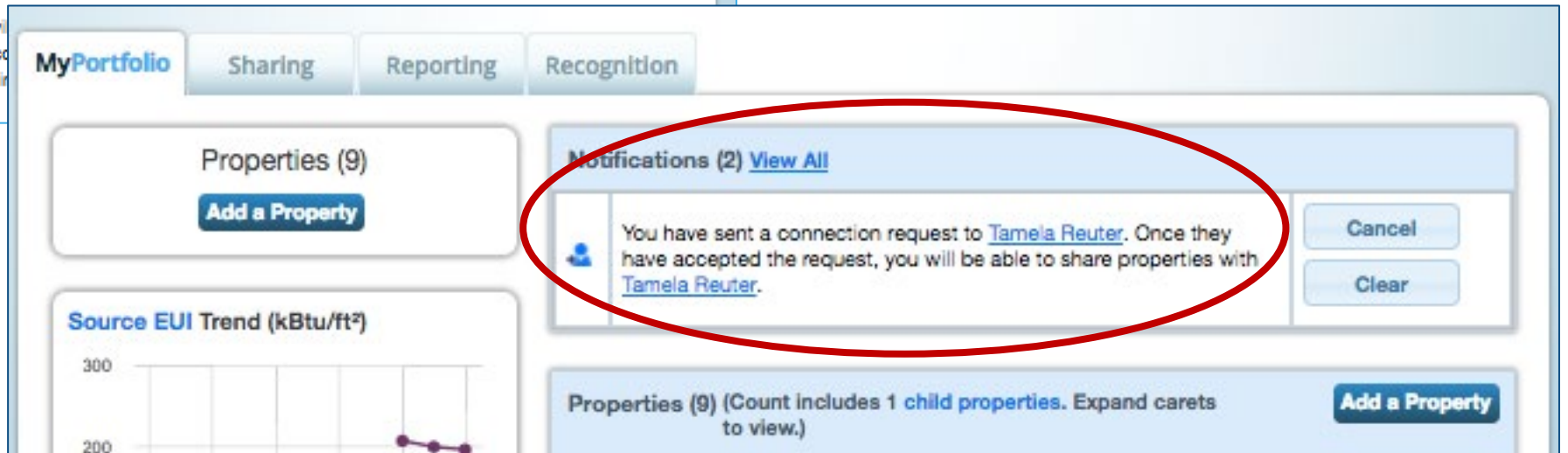
MyPortfolio | Sharing | Reporting | Recognition

A connection request has been sent to Tamela Reuter.

When Tamela accepts your request, you will be able to share property information.

Search Results

The results of your search are listed below. Clicking "Connect" will add a contact. If they accept, you will see them listed as a connected contact. If they do not, you will see them as an unconnected contact in your address book. Connect



MyPortfolio | Sharing | Reporting | Recognition

Properties (9)
[Add a Property](#)

Source EUI Trend (kBtu/ft²)

Notifications (2) [View All](#)

You have sent a connection request to [Tamela Reuter](#). Once they have accepted the request, you will be able to share properties with [Tamela Reuter](#).

[Cancel](#)
[Clear](#)

Properties (9) (Count includes 1 [child properties](#). Expand caret to view.) [Add a Property](#)

Contact Receives and Accepts Connection Request

The image displays two sequential screenshots of a web interface, illustrating the process of accepting a connection request. Both screenshots feature a top navigation bar with tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The left sidebar contains a 'Properties (1)' section with an 'Add a Property' button and a 'Source EUI Trend (kBtu/ft²)' section.

The top screenshot shows a 'Notifications (1)' section with a notification from 'Tamela Reuter' stating 'would like to connect with you.' To the right of the notification are two buttons: 'Accept' and 'Reject'. A large red arrow points from the 'Accept' button in this screenshot down to the 'Accept' button in the bottom screenshot.

The bottom screenshot shows the same interface after the request has been accepted. The 'Notifications (1)' section now contains a message: 'You have accepted a connection request from [Tamela Reuter](#). The connection has been made and will now show in your [Contacts list](#). If needed, you may now share property information with this contact.'


Connection Confirmed

MyPortfolio Sharing Reporting Recognition

Properties (1)

[Add a Property](#)

Notifications (1)

 You are connected to [Tamela Reuter](#).

[Clear](#)

Sharing Tab – Overview

MyPortfolio **Sharing** Reporting Recognition



My Shared Properties (2)

Share (or Edit Access to) a Property

Share with your Utility or Service Provider for exchanging data

Download Sharing Report

Sharing Notifications (2) [View All](#)

	Portfolio Manager 201 Sample Building - Sharing request sent to Rosemary Wallace	<input type="button" value="Cancel"/> <input type="button" value="Clear"/>
	Meter Issue Office Example - Share accepted by Rosemary Wallace	<input type="button" value="Clear"/>

Share Your Property: Multiple Properties

One Property
Multiple Properties
All Properties



Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.

1 Select Properties
We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

Multiple Properties **Select Properties**
[Selected Properties: 0](#)

2 Select People (Accounts)
Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

DATA REQUESTER, ENERGY STAR
ENERGY STAR TRAINING, ENERGY

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.

3 Choose Permissions
If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

* I am doing a single share OR I want to choose the same permissions for all of my share requests.
 I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permissions.

Continue [Cancel](#)

i Sharing with Accounts
In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

i Exchanging Data
To get started, first connect with an [organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left. **Note, you cannot share in bulk for "exchange data."**

NEW Who gets to Share Forward?
Full Access - Automatically includes "Share Forward" rights
Read Only - Automatically does NOT include "Share Forward" rights
Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
Data Exchange - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Share Your Property: Multiple Properties

The image shows two overlapping screenshots of the Energy Star Portfolio Manager 'Select Properties' dialog. A red arrow points from the 'Filter Properties (3)' section of the left screenshot to the right screenshot, where the 'Group 2 (2)' checkbox is checked.

Left Screenshot: Select Properties

<input type="checkbox"/>	Name	Primary Function	State/Province
<input type="checkbox"/>	Big Bank	Bank Branch	VA
<input type="checkbox"/>	Kids Daycare	Pre-school/Daycare	NC
<input type="checkbox"/>	Office 1	Office	DC

Selected Properties: 0 ([View Selection](#))

Filter Properties (3)

Filter by Group ([Create New Group](#))

- Group 1 (1)
- Group 2 (2)

Filter by Primary Function

- Bank Branch (1)
- Office (1)
- Pre-school/Daycare (1)

Filter by Construction Status

- Existing (2)
- Project (1)

Filter by State/Province

- District of Columbia (D.C.) (1)
- North Carolina (1)
- Virginia (1)

[Apply Selection](#) [Cancel](#)

Right Screenshot: Select Properties

<input type="checkbox"/>	Name	Primary Function	State/Province
<input type="checkbox"/>	Big Bank	Bank Branch	VA
<input type="checkbox"/>	Office 1	Office	DC

Selected Properties: 0 ([View Selection](#))

Filter Properties (3)

Filter by Group ([Create New Group](#))

- Group 1 (1)
- Group 2 (2)

Filter by Primary Function

- Bank Branch (1)
- Office (1)
- Pre-school/Daycare (1)

Filter by Construction Status


- Existing (2)
- Project (1)

Filter by State/Province

- District of Columbia (D.C.) (1)
- North Carolina (1)
- Virginia (1)

[Apply Selection](#) [Cancel](#)

Choose Permissions – Option 1



Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

* **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).

- Read Only Access
- Full Access
- Custom Access (meters are all shared at the same level)
- Exchange Data (You can share in bulk for exchanging data [here](#) or you can assign permissions one by one for each property using the radio button below.)
- Remove Access

Personalized Sharing & Exchange Data ("Custom Orders") - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

[Share Property\(ies\)](#) [Cancel](#)

Choose Permissions – Option 2



Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

- Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).
- Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

MyPortfolio | Sharing | Reporting | Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact
The access levels you select do not have to be the same for each property or each person.

Who gets to Share Forward?
Full Access - Automatically includes "Share Forward" rights
Read Only - Automatically does NOT include "Share Forward" rights
Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
Data Exchange - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Sort by:

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ 123 main street (4104902)					
ENERGY STAR TRAINING ENERGY STAR TRAINING	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
▼ Main Street Hospital (4101387)					
ENERGY STAR TRAINING ENERGY STAR TRAINING	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	

[Share Property\(ies\)](#) [Cancel](#)

Click arrow to show/hide permission options

Choose permissions



Sharing Notifications Appear in Both Accounts

User who shares a property receives a notification

The screenshot shows the 'Sharing' tab in the MyPortfolio interface. At the top, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. A green notification box at the top states: "You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required." Below this, there are three buttons: "Share (or Edit Access to) a Property", "Set Up Web Services/ Data Exchange", and "Download Sharing Report". To the right, under the heading "Sharing Notifications (1)", there is a notification for "Hotel Building 1 - Sharing request sent to ENERGY STAR TRAINING" with "Cancel" and "Clear" buttons. A red arrow points from the text on the left to the notification.

User with whom a property is shared also receives a notification

The screenshot shows the 'Sharing' tab in the MyPortfolio interface. At the top, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Below this, there are three buttons: "Share (or Edit Access to) a Property", "Set Up Web Services/ Data Exchange", and "Download Sharing Report". To the right, under the heading "Sharing Notifications (1)", there is a notification for "Hotel Building 1 - Shared from Andrew Schulte (Full Access)" with "Accept" and "Reject" buttons. A red arrow points from the text on the left to the notification.



Edit/Update Sharing Permissions

MyPortfolio
Sharing
Reporting
Recognition

My Shared Properties
(2)

Share (or Edit Access to) a Property

Share with your Utility or Service Provider for exchanging data

Download Sharing Report

Sharing Notifications (2) [View All](#)

↔	Portfolio Manager 201 Sample Building - Sharing request sent to Rosemary Wallace	<div style="background-color: #e6f2ff; padding: 2px 5px; margin-bottom: 2px;">Cancel</div> <div style="background-color: #e6f2ff; padding: 2px 5px;">Clear</div>
↔✓	Meter Issue Office Example - Share accepted by Rosemary Wallace	<div style="background-color: #e6f2ff; padding: 2px 5px;">Clear</div>

Overview of Shared Properties [Learn more about Sharing Properties](#)

By Contact
By Property

Filter By: All Sharing Contacts Search

Name	Organization	Properties We Share	Action
Rosemary Wallace (RW_Processor)	ICF	2	I want to... ▼

Page 1 of 1
View 1 - 1 of 1

! This table represents people with whom you share at least one property, either because you shared one with them, they shared one with you, or you both have access to another person's property. For complete sharing information, [download the Sharing Report](#) for your portfolio.



Sharing Rules: Granting and Editing Access

Access Level	Ability to Edit Share Permissions
Property Data Administrator	Can edit anyone's sharing permissions
Full Access	Can edit anyone's sharing permissions except for the Property Data Administrator
Read Only	Cannot edit anyone's access
Custom	Can only edit sharing permissions for those people with whom they directly shared
Exchange Data	Can only edit sharing permissions for those people with whom they directly shared

→ No other users can edit access for the Property Data Administrator

Share Forward

- Full Access
 - **Always** includes the ability to share forward
- Read Only Access
 - **Never** includes the ability to share forward
- Custom Access
 - Ability to share forward is an optional right
 - **You choose** if you want people to share forward
- Exchange Data
 - Ability to share forward is an optional right
 - **You choose** if you want people to share forward

Transfer Ownership

Summary
Details
Energy
Water
Waste & Materials
Goals
Design

Source EUI Trend (kBtu/ft²)

[Change Metric](#)

(Chart current as of 03/27/2023 01:51 PM EDT) [Refresh Chart](#)

[Change Metrics](#)

[Change Time Periods](#)

Metrics Summary

Metric	Sep 2020 (Energy Baseline)	Dec 2022 (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	98	N/A
Source EUI (kBtu/ft ²)	Not Available	5,878.3	N/A
Site EUI (kBtu/ft ²)	Not Available	2,099.4	N/A
Energy Cost (\$)	2,819,592.33	5,788,309.25	2968716.92 (105.30%)
Total (Location-Based) GHG Emissions Intensity (kgCO ₂ e/ft ²)	Not Available	174.8	N/A
Water Use (All Water Sources) (kgal)	0.0	0.0	0.00 (0.00001%)
Total Waste (Disposed and Diverted) (Tons)	Not Available	13.90	N/A

Data Quality Checker

Run a check for any 12-month time period to see if there are any possible errors found with your data.

[Check for Possible Errors](#)

Sharing this Property

[Share](#)

More About Sharing
 You haven't [shared your property](#) yet. Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)

[Copy Property](#)

[Download Property to Excel](#)



Transfer Ownership

The screenshot shows the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo and the text 'ENERGY STAR® PortfolioManager®'. At the top right, it says 'Welcome facciolos: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)'. Below the header are four tabs: 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main content area is titled 'Transfer Ownership of Your Property'. It contains an introductory paragraph: 'You may want to transfer ownership of your property to another person if you are no longer going to manage the property in Portfolio Manager. In order to transfer the property, the other person must have an account and be a connected contact.' Below this are two numbered steps: '1 Property to Transfer: Supermarket A-1' and '2 Select Person (Account) to Transfer to'. Under step 2, it asks 'Which person (account) do you want to transfer this property to?' and 'Select contact from my contacts book:'. There is a dropdown menu with the text '- Select a contact -'. To the right of the dropdown is an information icon (a yellow speech bubble with an 'i') and the heading 'Transfer to a Connected Contact'. Below this heading is a paragraph: 'The person that you are transferring your property to must be one of your connected contacts. If the person is not connected to you, you can always [connect with them](#).' At the bottom of the form are two buttons: a blue 'Transfer Property' button and a blue 'Cancel' link.



Pop Quiz!

5. True or False: in order to share a property record with another Portfolio Manager user, you must first be connected to them.

- A. True
- B. False

6. True or False: if you share a property record with another Portfolio Manager user, you must allow them full read/write access to your data.

- A. True
- B. False

Pop Quiz!

5. True or False: in order to share a property record with another Portfolio Manager user, you must first be connected to them.

- A. True
- B. False

Before you can “share” a property with another PM user, you must be “connected” at the account level.

6. True or False: if you share a property record with another Portfolio Manager user, you must allow them full read/write access to your data.

- A. True
- B. False

When you share with other PM users, you can provide varying levels of access, including read-only, or a combination of full access and read-only for various elements of your property.

Recap

In this training, we learned how to:

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

ENERGY STAR Help Desk

The screenshot shows the ENERGY STAR Help Desk website. At the top left is the ENERGY STAR logo. To the right are navigation links for 'ABOUT' and 'FOR PARTNERS', and a search bar with a magnifying glass icon. Below these are links for 'Find Products', 'Save at Home', 'New Homes', 'Commercial Buildings', and 'Industrial Plants'. A large banner image of a modern building with a search bar and 'SEARCH' button is positioned below the navigation. Underneath the banner are 'HOME' and 'CONTACT US' links. The main content area features a 'WELCOME!' heading and a sub-heading 'A place where you can easily find solutions and ask questions'. On the left, there is a 'Topics' section with a dropdown arrow and a list of categories: 'Portfolio Manager FAQs', 'Federal, State & Local Requirements', 'Account Basics', 'ENERGY STAR Certification', 'Metrics (Score, EUI, Etc)', 'Meters', 'Property Information', 'Property Types', 'Web Services', and 'Water And Waste Benchmarking'. On the right, there is a 'TRENDING ARTICLES' section with a list of article titles: 'How do I Copy and Paste Data into my Meter?', 'Standard IDs in Portfolio Manager', 'What should I include in my GFA?', 'Contacts for state/local compliance ordinances', and 'List of Utilities offering Web Services'. At the bottom right of the main content area is a blue button labeled 'CONTACT SUPPORT'.

On-demand user support at energystar.gov/buildingshelp



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
- **Ask the Expert**
 - Wednesdays at 12:00 noon ET. It's an open Q&A session for Portfolio Manager questions.
 - <https://energystar-mesa.force.com/PortfolioManager/s/article/When-are-the-Ask-The-Expert-webinars-1600088554111>
- **Register for regular webinars at: <https://esbuildings.webex.com/webappng/sites/esbuildings/meeting/home>**
- **Portfolio Manager Technical Reference Series: https://www.energystar.gov/buildings/tools-and-resources?f0=im_field_select_primary_category:1522**

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

