



We've been busy over the winter, working on a variety of improvements to Portfolio Manager to help make benchmarking energy and water use easier. This Trainer Community update focuses on these improvements, and those that are upcoming. We always appreciate hearing your feedback and ideas for future improvements at [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp)

- **Updated upload spreadsheets and new video.** The upload spreadsheets have been updated to be more user friendly! This includes color coding for required and optional data, more help text within the spreadsheets, and an updated instruction tab. Also, the spreadsheet to Add Bills no longer adds rows for inactive meters. Along with these new additions, keep an eye out for a new short video on how to upload meter consumption information to existing meters, to be posted at [www.energystar.gov/buildings/training](http://www.energystar.gov/buildings/training)
- **Accept or reject a building transfer.** Prior to this change, property transfers were automatic and happened literally at the click of a button. Now, you must accept a transfer for it to go through. If you do not accept, the property stays in its original account. Furthermore, if web services are associated with the transferred building and you aren't connected to the provider, Portfolio Manager will prompt you to send a connection request to the provider to continue receiving web services. If you don't do this, the connection between the provider and the transferred building will be severed.
- **Label "test" buildings in your account.** Many people use Portfolio Manager partly as a test environment to assess building performance, or for other purposes such as training others. We recently added the ability to designate a property as a test property when you create it. You can also designate an existing property as a test by editing the property's basic information on the Details tab. Marking properties as "test" will exclude them from your reports and Portfolio-wide graphics. More information is available [here](#).
- **Improved data request functionality.** A data request is used to request data from other Portfolio Manager account holders. We have improved the request functionality to make sure the data you submit in response to data requests is as complete as possible. There is now a new alert report if the data you're submitting has at least one property within the response which cannot receive an annual site EUI or water use metric for the performance period. If this is the case, an

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alert box will appear on the Reporting tab through which you can read more about the flagged issues and choose whether or not you want to correct them before submitting your data.

- **New guidance on how to benchmark district energy and negative meters.** We are providing more granularity on how to benchmark district energy and report negative meter entries to help guide people who are generating energy and transferring it to multiple buildings. Check out the new FAQs at [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp)

We look forward to bringing you ENERGY STAR news throughout 2015! Until next time, please direct any questions to [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp). You can also follow us on Twitter at #EnergyStarBldgs.

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