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

January 26, 2021

Summary of Frequently Asked Questions

1. Setting up Your Portfolio Manager Account

- **What kind of property use type options are offered in PM?**
    - *FAQ: What Property Types are available in PM?*
- **How should a property with mixed uses report the different property use types?**
    - *FAQ: When should I create separate property uses?*
    - *FAQ: What property type should I use for my property?*
- **How should I benchmark a Data Center?**
    - *Please refer to the Data Center FAQ category*
- **How should I benchmark my campus property? What constitutes as a single property?**
    - *FAQ: What constitutes a single structure? What if multiple buildings are connected via walkways or common space?*
    - *FAQ: What constitutes a campus?*
- **How do I perform data quality checks in Portfolio Manager?**
    - *FAQ: What is the Data Quality Checker?*
- **How do I share properties in Portfolio Manager?**
    - *FAQ: How do I share properties?*

2. Energy Data and Metering in Portfolio Manager

- **How do I benchmark onsite solar energy in Portfolio Manager?**
    - *Please refer to the Onsite Green Power (that I Generate) FAQ category*
- **How do I benchmark water in Portfolio Manager? What kind of water is reported? (Hot, cold, potable, reclaimed)**
    - *FAQ: How Is water tracked In Portfolio Manager?*
- **Can I combine tenant meters into a single aggregate meter?**
    - *FAQ: Can I combine 30 meters into one?*
- **How do you set energy performance goals in Portfolio Manager?**
    - *FAQ: What is a target and how do I set one?*
- **What are my options for getting my energy data Into Portfolio Manager?**
    - *FAQ: What are the five options for entering meter data?*
- **How do I set up utility data sharing so that I don't need to manually enter utility bills?**
    - FAQ: *List of Utilities who offer data sharing*
- **If tenants pay their own utility bills, am I still responsible for reporting this energy consumption?**
    - *All Portfolio Manager metrics are calculated using whole-building data. In most cases, your jurisdiction will require you to report whole building energy consumption.*
    - *If you need help gathering whole-building data, see this FAQ.*

3. Ordinance Specific Questions

- **How do I reach out to my state/local jurisdiction if I have specific questions about compliance?**
    - *FAQ: Contacts for state/local compliance ordinances*
    - *FAQ: State & Local Benchmarking Requirements*

- **How do I find my Standard ID to enter into Portfolio Manager?**
    - *You will need to reach out to your benchmarking jurisdiction to obtain your Standard ID.*
    - *FAQ: Standard IDs in Portfolio Manager*
- **How do I know if I have successfully submitted a response to a local ordinance's Data Request?**
    - *FAQ: How do I find the receipt for the Data Request that I submitted?*
- **Are there companies-for-hire that can set up a property and submit on behalf of my property?**
    - *Often the easiest option to ensure successful compliance is to work with one of the many energy services companies in the market that are highly experienced in Portfolio Manager benchmarking and ordinance compliance.*
    - *These companies can help you to complete the compliance process start to finish including setting up your accounts and properties, obtaining whole-building energy and/or water consumption data for your building, and submitting the data to your local jurisdiction. If you want to learn more about working with a 3rd party energy services company, a good starting place is the list of "Service Providers That Exchange Data with Portfolio Manager." This list includes service providers who have been the most active in Portfolio Manager over the past year.*
    - *Link: Most Active Service & Product Providers*