A Beginner’s Guide to Using Portfolio Manager for Benchmarking Law Compliance
“Basics of Building Benchmarking for Ordinance Compliance” Webinar Series

• **Part 1** (January 25)
  *A Beginner’s Guide to Using Portfolio Manager for Benchmarking Law Compliance*

• **Part 2** (February 10)
  *Using Benchmarking Results to Understand your Building’s Performance*

• **Part 3** (March 10)
  *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, 5-minute videos on introductory topics related to Portfolio Manager available at www.energystar.gov/buildings/training
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
What is a Benchmarking Law?

Interactive Map Available at: https://www.energystar.gov/buildings/program-administrators/state-and-local-governments/see-federal-state-and-local-benchmarking-policies

Find another benchmarking ordinance map at: https://www.imt.org/resources/map-u-s-building-benchmarking-policies/
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**: info.services@nrcan-rncan.gc.ca
- **Website**: [https://www.nrcan.gc.ca/energy-efficiency/energy-star-canada/18953](https://www.nrcan.gc.ca/energy-efficiency/energy-star-canada/18953)
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.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Company Type</th>
<th>Contact</th>
<th>Benchmark</th>
<th>ENERGY STAR Certifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENGIE Impact</td>
<td>Energy or Architecture Related Professional, Consulting or Procurement Services, Energy Management</td>
<td>Paige Janson 800-767-4197 (phone) <a href="mailto:info@engieimpact.com">info@engieimpact.com</a></td>
<td>51319</td>
<td>250</td>
</tr>
<tr>
<td>Schneider Electric</td>
<td>Energy or Architecture Related Professional, Consulting or Procurement Services, Energy Management</td>
<td>Erik Mohn 502-614-2348 (phone) <a href="mailto:erik.mohn@se.com">erik.mohn@se.com</a></td>
<td>43915</td>
<td>416</td>
</tr>
<tr>
<td>WegoWise</td>
<td>Energy or Architecture Related Professional, Consulting or Procurement Services, Energy Management</td>
<td>Dan Teague 617-367-9346 (phone) <a href="mailto:dteague@wegowise.com">dteague@wegowise.com</a></td>
<td>18658</td>
<td>55</td>
</tr>
<tr>
<td>Bright Power, Inc.</td>
<td>Energy or Architecture Related Professional, Consulting or Procurement Services, Energy Management</td>
<td>Jeffrey Perlman 212-803-5868 (phone) <a href="mailto:jperlman@brightpower.com">jperlman@brightpower.com</a></td>
<td>18374</td>
<td>146</td>
</tr>
<tr>
<td>Measurabl, Inc.</td>
<td>Energy Information and Data Management</td>
<td>Measurabl Team 619-719-1716 (phone) <a href="mailto:info@measurabl.com">info@measurabl.com</a></td>
<td>17641</td>
<td>1287</td>
</tr>
<tr>
<td>Willdan Group, Inc.</td>
<td>Energy or Architecture Related Professional, Consulting or Procurement Services, Energy Management</td>
<td>Jason Steinbock 515.271.9908 (phone) <a href="mailto:jsteinbock@willdan.com">jsteinbock@willdan.com</a></td>
<td>15698</td>
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</tbody>
</table>

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
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.

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
Select “Register Now”

Free, online secure platform: www.energystar.gov/portfoliomanager
Add a Property
Add a Property: Existing Property

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition.

Select Property Type

Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

Learn more about Property Types.

Select number of buildings

Your Property's Buildings

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?

Select construction status

Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

- Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
- Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
- Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

Get Started!
Basic Property Information

Set Up a Property: Basic Property Information
Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name: 

Country: 

Street Address: 

City/Municipality: 

State/Province: 

Postal Code: 

Year Built: 

Gross Floor Area: Sq Ft

Temporary Value

Irrigated Area: Sq Ft

Occupancy: %
Basic Property Information

Standard IDs
Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See this FAQ if you need help finding your Standard ID.

Standard ID(s):

Select from drop-down and enter value manually

Do any of these apply?
- My property's energy consumption includes parking areas
- My property has a Data Center that requires a constant power load of 75 kW or more
- My property has one or more retail stores
- My property has one or more restaurants/cafeterias

Need help figuring out your standard ID? Click here: https://sforce.co/3a2Fjxh
Enter Values for Property Use Details

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the onsite preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Floor Area</td>
<td>100,000 Sq. Ft</td>
<td>1/1/1990</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Workers on Main Shift</td>
<td>default</td>
<td>1/1/1992</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gross Floor Area</td>
<td>12,000 Sq. Ft</td>
<td>1/1/1992</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
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<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
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<tbody>
<tr>
<td>Weekly Operating Hours</td>
<td>default</td>
<td>1/1/1992</td>
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<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Open or Closed Refrigerators</td>
<td>default</td>
<td>1/1/1992</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Cash Registers</td>
<td>default</td>
<td>1/1/1992</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Computers</td>
<td>default</td>
<td>1/1/1992</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Walk-in Refrigerators</td>
<td>default</td>
<td>1/1/1992</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Area of All Walk-in Refrigerators</td>
<td>default</td>
<td>1/1/1992</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooking Facilities</td>
<td>default</td>
<td>1/1/1992</td>
<td></td>
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<table>
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<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent That Can Be Heated</td>
<td>default</td>
<td>1/1/1992</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Property Use Detail</th>
<th>Value</th>
<th>Current As Of</th>
<th>Temporary Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent That Can Be Cooled</td>
<td>default</td>
<td>1/1/1992</td>
<td></td>
</tr>
</tbody>
</table>
Property Summary Tab

Congratulations! You have successfully created your property.

Next, you can:

- Add energy use information, so that you can see your energy performance metrics.

ENERGY STAR Elementary

123 Main Street, Washington, DC 20001 | Map It
Portfolio Manager Property ID: 14253785
Year Built: 1900

Not currently eligible for ENERGY STAR Certification

Weather Normalized Source EUI (kBtu/ft²)

Current: N/A
Baseline: N/A
Manual Data Entry – Energy Meters

Congratulations! You have successfully created your property.

Next, you can:

- Add energy use information, so that you can see your energy performance metrics.
Enter Additional Information

Get Started Setting Up Meters for Supermarket A-1

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.

Sources of Your Property's Energy
What kind of energy do you want to track? Please select all that apply.

- Electric
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Coal (anthracite)
- Coal (bituminous)
- Coke
- Wood
- Kerosene
- Fuel Oil (No. 1)
- Other: ___________________________

Tracking Energy
To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g., gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g., gas), and not for the fuel you produce.

Two Meters Needed for Onsite Solar/Wind
If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. Learn More.

Automate Your Meter Entries
There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. Learn more.
# About Your Meters

**About Your Meters for Supermarket A-1**

Enter the information below about your new meters. The meter’s *Units* and *Date Meter became Active* are required. You can also change the meter’s name.

## 2 Energy Meters for Supermarket A-1 (click table to edit)

<table>
<thead>
<tr>
<th></th>
<th>Meter Name</th>
<th>Type</th>
<th>Other Type</th>
<th>Units</th>
<th>Date Meter became Active</th>
<th>In Use?</th>
<th>Date Meter became Inactive</th>
<th>Enter as Delivery?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Natural Gas</td>
<td>Natural Gas</td>
<td></td>
<td>ccf (hundred cubic feet)</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>2</td>
<td>Electric Grid Meter</td>
<td>Electric - Grid</td>
<td></td>
<td>cf (cubic feet)</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

**Actions:**
- Delete Selected Entries
- Add Another Entry

[Back] [Create Meters] [Cancel]
Add Energy Consumption Information

Your Meter Entries for Supermarket A-1

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

3 Energy Meter(s) for Supermarket A-1

- Natural Gas Edit
- Fuel Oil (No. 2) Edit
- Electric Grid Meter Edit

Follow Us [Icons]
Add Meter Entries and Fill in Data

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Usage kWh (thousand Watt-hours)</th>
<th>Total Cost ($)</th>
<th>Estimation</th>
<th>Green Power</th>
<th>Demand (kW)</th>
<th>Demand Cost ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Add another entry

Use a spreadsheet to upload or copy and paste
Meters to Add to Total Consumption

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for Supermarket A-1 so that we can provide you with the most accurate metrics possible.

Summary

3

Please tell us what your meters represent.

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). Learn More about configuring meters for performance metrics.

Energy Meters

Select all meters to be included in your Energy metrics. (Hint: All meters should be included unless they are sub-meters.)

- Name Meter ID: Fuel Oil (No. 2) 30521002
- Type: Fuel Oil (No. 2)
- Name Meter ID: Natural Gas 30521001
- Type: Natural Gas
- Name Meter ID: Electric Grid Meter 30521003
- Type: Electric - Grid

Total of 3 meter(s). Tell us what this represents:

- These meter(s) account for the total energy consumption for Supermarket A-1 (a single building).
- These meter(s) do not account for the total energy consumption for Supermarket A-1 (a single building).

Apply Selections
Energy Meters Tab: Meters Added and Displayed

Notification

Add or update bills

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

Supermarket A-1
1214 Main Street, Arlington, VA 22201 | Map It
Portfolio Manager Property ID: 6836165
Year Built: 1992
Edit

Weather Normalized Source EUI (kBtu/ft²)
Current: N/A
Baseline: N/A

Energy Meters Tab: Meters Added and Displayed
View Meter Data and Manage Bills for Your Property

### Monthly Entries

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Usage kWh (thousand Watt-hours)</th>
<th>Total Cost ($)</th>
<th>Estimation</th>
<th>Green Power</th>
<th>Demand (kW)</th>
<th>Demand Cost ($)</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2019</td>
<td>2/1/2019</td>
<td>532.173</td>
<td>39,900.00</td>
<td></td>
<td></td>
<td>1,293</td>
<td>13,304.00</td>
<td></td>
</tr>
<tr>
<td>2/1/2019</td>
<td>3/1/2019</td>
<td>518.833</td>
<td>37,500.00</td>
<td></td>
<td></td>
<td>1,261</td>
<td>12,970.00</td>
<td></td>
</tr>
<tr>
<td>3/1/2019</td>
<td>4/1/2019</td>
<td>516.496</td>
<td>37,245.00</td>
<td></td>
<td></td>
<td>1,255</td>
<td>12,912.00</td>
<td></td>
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<tr>
<td>4/1/2019</td>
<td>5/1/2019</td>
<td>500.123</td>
<td>35,689.00</td>
<td></td>
<td></td>
<td>1,214</td>
<td>12,503.00</td>
<td></td>
</tr>
</tbody>
</table>

- [Delete Selected Entries](#)
- [Add Another Entry](#)
- [Learn how to copy/paste](#)
- [Delete All Entries](#)

Upload data in bulk for this meter:

You can use the single-meter spreadsheet to either: "Upload" the file below, or copy and paste the data from the spreadsheet into the table above (Instructions in this FAQ). Use this single-meter spreadsheet template:

[Browser... Upload]

[Save Bills]
[Cancel]
Learning Objectives

• Understanding the role of EPA’s Portfolio Manager tool in benchmarking ordinance compliance
• Getting started using Portfolio Manager
• Successfully submitting building data to your local jurisdiction
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

Notations (0)
You have no new notifications.

Property Profile (Changes coming Fall 2017)
This section will be deleted in the Fall of 2017, except for the property photos which will remain.

Metrics Summary

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ENERGY STAR score</td>
<td>1</td>
<td>1</td>
<td>0(0.0%)</td>
</tr>
<tr>
<td>Source EUI (kBtu/ft²)</td>
<td>811.1</td>
<td>727.0</td>
<td>-84.1(-10.4%)</td>
</tr>
<tr>
<td>Site EUI (kBtu/ft²)</td>
<td>326.4</td>
<td>263.4</td>
<td>-63.0(-19.3%)</td>
</tr>
<tr>
<td>Energy Cost ($)</td>
<td>581,581.78</td>
<td>540,588.06</td>
<td>-40,993.72(-7.0%)</td>
</tr>
<tr>
<td>Total GHG Emissions (Metric Tons CO2e)</td>
<td>3,337.4</td>
<td>2,941.4</td>
<td>-396.0(-11.9%)</td>
</tr>
<tr>
<td>Water Use (All Water Sources) (kga)</td>
<td>3,373.9</td>
<td>3,228.1</td>
<td>-145.8(-4.3%)</td>
</tr>
<tr>
<td>Total Waste (Disposed and Diverted) (Tons)</td>
<td>879.99</td>
<td>836.75</td>
<td>-43.24(-4.9%)</td>
</tr>
</tbody>
</table>

Check for Possible Data Errors
Run a check for any 12-month time period to see if there are any possible errors found with your data.
Accessing a Data Request

About this Data Request

Data Requested By: City of Atlanta

Instructions: This reporting template must be used for compliance with the City of Atlanta’s benchmarking requirements in accordance with Section 8-2222 of the Land Development Code, Part III of the Atlanta City Code.

The deadline for meeting the 2021 compliance requirement is June 1, 2021, covering the calendar year 2020. For detailed instructions on how to comply with Atlanta’s benchmarking ordinance and for the most up-to-date information including deadlines, visit www.atlantabuildingefficiency.com.

Make sure to include your Atlanta Building ID in your submission. To add, go to your property’s profile, select the "details" tab at the top, find the "Unique Identifiers" box on the left-hand side, click "edit", scroll down to "Standard IDs", select "Atlanta Buildings ID", enter your Atlanta Buildings ID, and click "Save".

For help, contact: City of Atlanta at buildingefficiency@atlantaga.gov or Unavailable

Responding to Data Requests

You are viewing this screen because someone has asked you to provide data to them in the form of a data request. To respond, simply fill out the information on this screen and select what properties you wish to include (some decisions may have been made by the data requestor.)

Also see the How to Respond to Data Requests guide.
Accessing a Data Request

About Your Response

Who is this data being submitted on behalf of?

- myself
- someone else

Select if you’re submitting the request yourself, or on behalf of someone else

Your Response

Select Information to Include:

Timeframe: Single Year – Dec 31 – 2019

If the data requestor has specified a timeframe for the request, you will not be able to change it.

Properties: - Select Number of Property(ies) -

The data requestor may have asked for one or more standard IDs to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response.

Select properties that are required to benchmark

Generate Response Preview

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.

Cancel
Preview Your Response

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Request: Test (Request from Jon Smith)</td>
<td>Response Preview Generated: 5/13/2013 5:43 PM</td>
<td>I want to:</td>
</tr>
<tr>
<td>Sample EPA Report #2</td>
<td>No Spreadsheet Generated</td>
<td>Edit Properties and Timetable</td>
</tr>
<tr>
<td>Sample EPA Report #1</td>
<td>No Spreadsheet Generated</td>
<td>Preview Response</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Download Preview in Excel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Generate an Updated Response</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Send Response</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Delete Response</td>
</tr>
</tbody>
</table>

Your new response preview(s) has been generated.
Preview Your Response

The image shows the interface of the ENERGY STAR Portfolio Manager. It displays a report titled "View Report: Atlanta 2020 Transparency Report." The report is generated from a report template and includes information and metrics for properties included in the report. The table below shows the data for one property:

<table>
<thead>
<tr>
<th>Property Id</th>
<th>Property Name</th>
<th>Year Ending</th>
<th>Atlanta Building ID</th>
<th>Address 1</th>
<th>Address 2</th>
<th>City</th>
<th>Cour</th>
</tr>
</thead>
<tbody>
<tr>
<td>13502081</td>
<td>ICF HQ - Building II</td>
<td>12/31/2019</td>
<td>Not Available</td>
<td>9306 Lee Hwy</td>
<td>Not Available</td>
<td>Fairfax</td>
<td>Not Av</td>
</tr>
</tbody>
</table>
Send the Response to Complete Compliance

1. Who (besides you) should we send a confirmation email to?
   Select contacts from your contacts book:

   Example1 (EXACCOUNT1)
   Example2 (EXACCOUNT2)
   Example3 (EXACCOUNT3)

   To select multiple contacts, hold down your Control (CTRL) key and click on each selection.

   Optional: Additional Email Addresses:

   Separate multiple emails by a comma or semicolon.

2. What format would you like your data in for the email attachment?
   - Excel
   - XML

3. E-Sign your Data Response, then "Send Data"

   ☐ I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Rising Stars with Test Org.

   Your username:

   Your password:

   E-Sign Response

   Send Data
Send the Response to Complete Compliance

**What Would You Like To Do?**

I Want to Review/Edit these Properties

You can review individual properties/meters by using the links in the table above or download it to Excel in order to begin troubleshooting these issues.

I Thought I Fixed These Problems- I Want to **Generate an Updated Response**

If you have made changes to your data since your response was generated (05/08/2020 03:02 PM EDT), you will need to re-generate the report in order for these changes to be reflected.

I Want to Submit Anyway

If you have verified that any issues listed in the table above are not the result of a mistake, you can continue submitting your response. Note that an incomplete request could be considered invalid or non-compliant by the requestor so it is strongly encouraged that you fix any issue before proceeding.

 Generate Updated Response

Send Response

(You will confirm your response on the next screen)
Send the Response to Complete Compliance

Your response to the data request from Rising Stars has been successfully sent. You will receive a confirmation email with a receipt and a copy of the data attached shortly.
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:

- 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:

- How to share properties in Portfolio Manager:
Benchmarking Law Compliance FAQs

FAQs are available at www.energystar.gov/buildingshelp

STATE & LOCAL BENCHMARKING REQUIREMENTS

How do I find the receipt for the Data Request that I submitted?

24 Views • Jan 12, 2021 • Knowledge

FAQs are available at www.energystar.gov/buildingshelp
“Basics of Building Benchmarking for Ordinance Compliance” Webinar Series

✓ Part 1 (January 25)
A Beginner’s Guide to Using Portfolio Manager for Benchmarking Law Compliance

• Register for Part 2 here (February 10)
Using Benchmarking Results to Understand your Building’s Performance

• Register for Part 3 here (March 10)
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:
  oliomanager_model_tech_desc
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