FAQ

Portfolio Manager 301 Frequently Asked Questions

Contents

Other questions?

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Benchmarking and Reporting

Q1: How do I benchmark an onsite solar field?

To enter the energy used on site and the energy exported to the grid, there are multiple calculations and steps you should take to ensure the highest accuracy. The EPA has created a three-part guide to help you through these calculations:

- [Part 1: How do I enter onsite green power (solar/wind)? Part 1- Create Meters](#)

- [Part 2: How do I enter onsite green power (solar/wind)? Part 1- Create Meters](#)

- [Part 3: How do I enter onsite green power (solar/wind)? Part 3 - Net-Metering](#)

Q2: How do I benchmark a multifamily property?

First, you should determine whether or not you will benchmark all buildings separately, or as a campus. If there are multiple buildings on the property, it must be benchmarked as a campus. Benchmarking as a campus will allow you to analyze the data for the entire property as a whole. To benchmark as a campus, you have three options in designating the "parent" property against the "child" property. See here for more information: [How do I benchmark a campus?](#)

To benchmark a multifamily property, you must enter complete energy date, listed here: [What information do I need to receive a score for Multifamily property?](#)

Q3: Can space types be designated as landlord or tenant controlled?

If you are benchmarking specifically a tenant space within a building, then you can designate the property as tenant controlled. This space can include all spaces within a single building that is leased by a singular tenant, even if the spaces are not contiguous. However, a smaller space type within a larger property record cannot be designated as tenant controlled.

Q4: Can I select the units the meter data is downloaded in?

Yes, at any point during the benchmarking process you are able to change the units associated with your meter. To do this, you will first go into the property record you would like to modify. From the Energy or Water Tab, select the meter you want to change the units for. You should see a "Basic Meter Information" bar above the Monthly Entries. Edit the Units, and then save the changes.

Q5: Can I share report templates with someone I am not connected to?

If you want to share the report template within Portfolio Manager, you must be connected to the Portfolio Manager user in order to share the report template.

However, if you want to share the report template by email, then you can create a URL within Portfolio Manager to send out. In this case, you do not have to be connected to each recipient in Portfolio Manager to share the report template.

Setting Baselines and Targets

Q6: Can I share report templates with someone I am not connected to?

Can I set portfolio targets and property specific targets?

You can set portfolio targets and property specific targets for your property, but you must set them one at a time. To set portfolio-wide targets, you will start in the MyPortfolio Tab in Portfolio Manager, and select "Set a Portfolio Baseline and/or target" from the "Manage Portfolio" box in the bottom left:

Set a portfolio baseline and/or target to help measure progress.

To set a property specific target, you will click into the property record from the dashboard in the MyPortfolio Tab, navigate to the goals tab within the property record, and select the blue "Set Baselines or Target" button located in the Baselines & Targets box:

Set Baselines or Target

Q7: How do I establish a baseline?

The baseline year, at default, will be the first year for which your property has 12 full months of data. However, the baseline year can always be changed. To set the baseline, follow the steps listed in question 1.

Q8: Why do I need to establish a baseline?

The baseline is a historic point of comparison you can use to track changes and improvements at your property over time.

Q9: Do I need complete energy data for the baseline year?

Yes, you need 12 full calendar months of energy data to establish the baseline.

Q10: What is the date range of my baseline if I enter "December 31, 2022"

The baseline year looks back 12 months from the date entered. So if December 31, 2022 is entered, the baseline year will range from January 1, 2022-December 31, 2022. See here for more information: What does "12 full months" mean? (site.com)

Q11: How do I know what targets I should set?

Portfolio Manager provides a number of metrics that you can use as targets for your property. These are:

- Target ENERGY STAR Score

- Target % Better Than Median Source EUI

- Target Site Energy Use (kBtu)

- Target Source Energy Use (kBtu)

- Target Site EUI (kBtu/ft²)

- Target Source EUI (kBtu/ft²)

- Target Total GHG Emissions (Metric Tons CO2e)

- Target Energy Cost ($)

- Target Water/Wastewater Site EUI (kBtu/gpd)

- Target Water/Wastewater Source EUI (kBtu/gpd)

If you need guidance on what number to use for your target, you can refer to the CBECS consumption data here: Energy Information Administration (EIA)- Commercial Buildings Energy Consumption Survey (CBECS) Data

Q12: What steps can I take in my building to reach my targets?

EPA's ENERGY STAR Program has a number of resources available to help building owners and managers and save energy and money. There is guidance on upgrading your lighting, operations & maintenance best practices, reducing IT energy use, and more. See here for more information: Ways to Save | ENERGY STAR