Portfolio Manager 301: Spreadsheet Uploads, Setting Goals, and Creating Custom Reporting Templates

Learning Objectives

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

- Update data using the spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reporting templates
- Use the Sustainable Buildings Checklist

How To

- Update data using the spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reporting templates
- Use the Sustainable Buildings Checklist

ENERGY STAR® Portfolio Manager®

Building Emissions Calculator

[Click here to be taken to the Buildings Emissions Calculator]

- Past, Current, and Future GHG Calculations
- Estimate your building's GHG emissions
- Support GHG emissions inventories

Click below to get started!

IMPORT DATA FROM PORTFOLIO MANAGER ACCOUNT

Simplest option for retrieving your data

UPLOAD REPORT FROM PORTFOLIO MANAGER

Best option if you use groups or other filters in Portfolio Manager

ENTER THE DATA MANUALLY

Use this option if you don't have building data in Portfolio Manager

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Update data using the spreadsheet upload feature

Action

1. Create property records (add new records to account)
2. Create meters
3. Add consumption to meters
4. Edit basic property information
5. Update property use details

Process

For action 1:

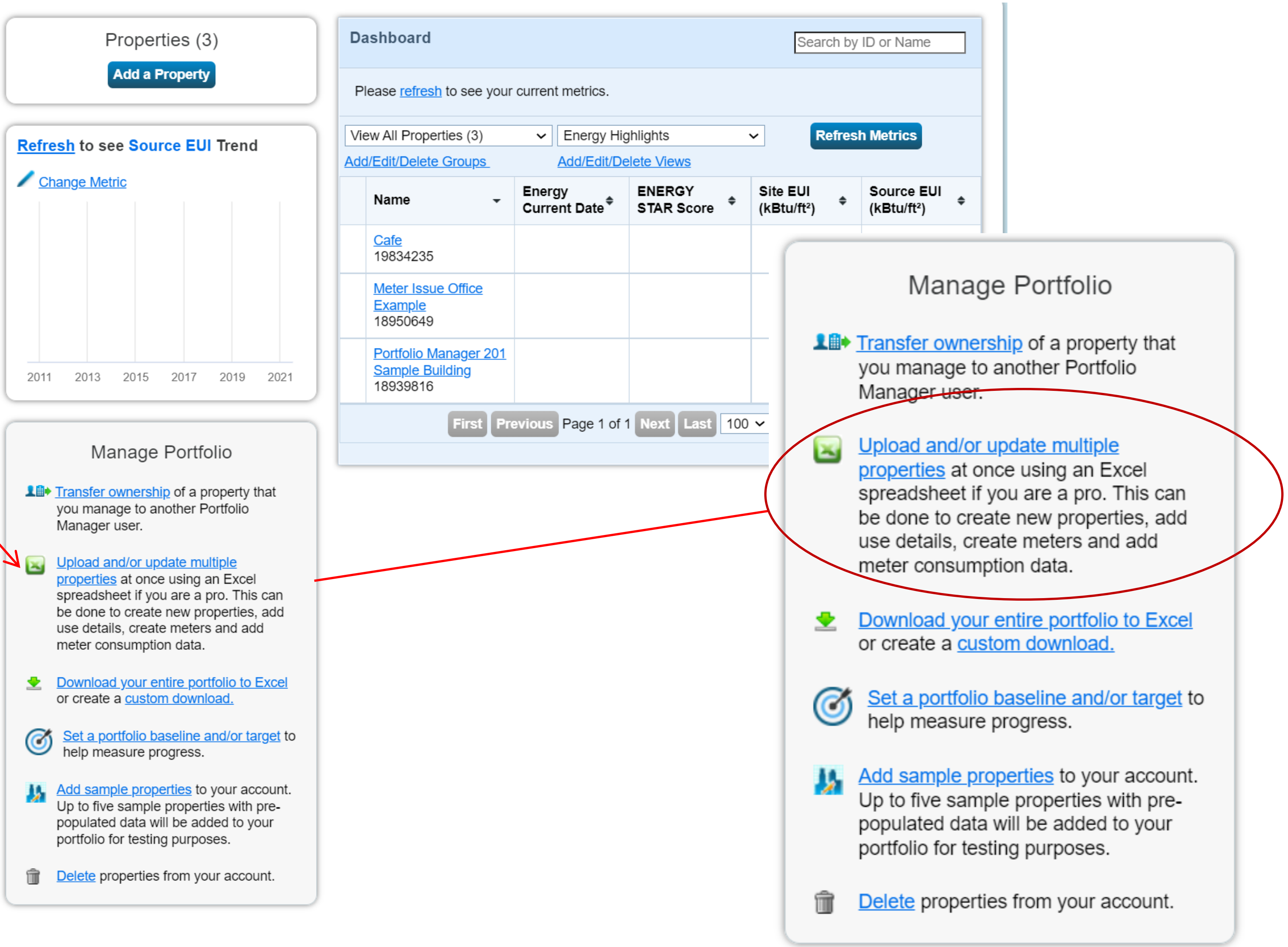
a) Download spreadsheet
b) Fill in data
c) Upload to PM

For actions 2–5:

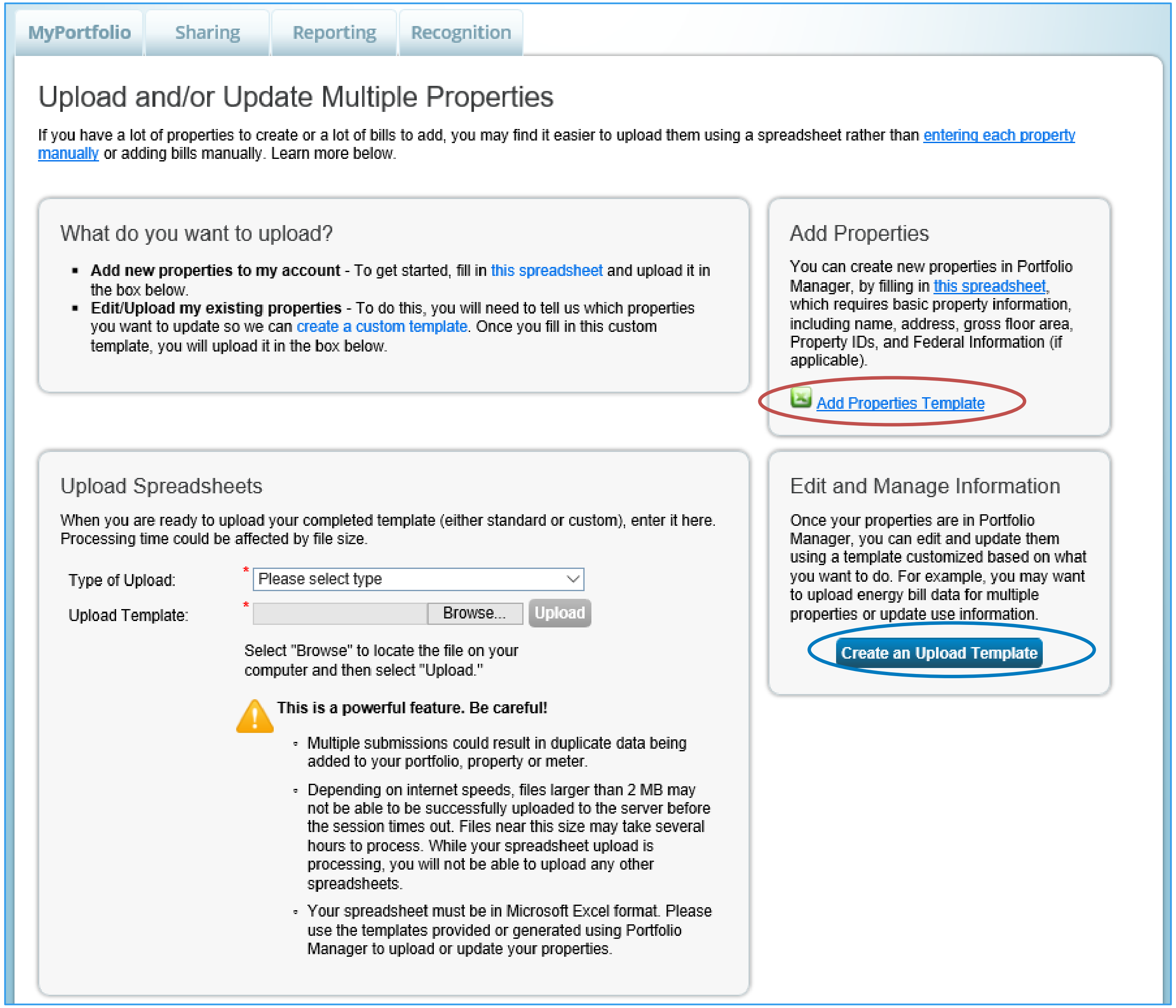
a) Select properties to update
b) Download custom spreadsheet
c) Fill in data
d) Upload to PM

Update data using the spreadsheet upload feature

Scroll to Manage Portfolio menu



Spreadsheet Upload Overview



Property Name (Required)	Street Address (Required)	Street Address 2 (Optional)	City/Municipality (Required)	State/Province (Required)	Other State/Province (Required for Non-US-or-Canada)	Postal Code (Required)	Country (Required)	Year Built/Year Planned for Construction Completion (Required)	Primary Function (Required)
Main Warehouse	714 W. Camargo		San Antonio	TX		78205	United States	1975	Non-Refrigerated W
Office Tower	716 W. Huisache		San Antonio	TX		78212	United States	1994	Office
Sunshine School	800 Flores St.		San Antonio	TX		78212	Unites	1980	Adult Education

Instructions | Properties | US or CA Federal Property Info | Property IDs | Uses | Parking | Swimming Poo ...

- Read the Instructions tab.
- At a minimum, complete the green required fields on the Properties tab.
- Don’t make any format changes to the spreadsheet.

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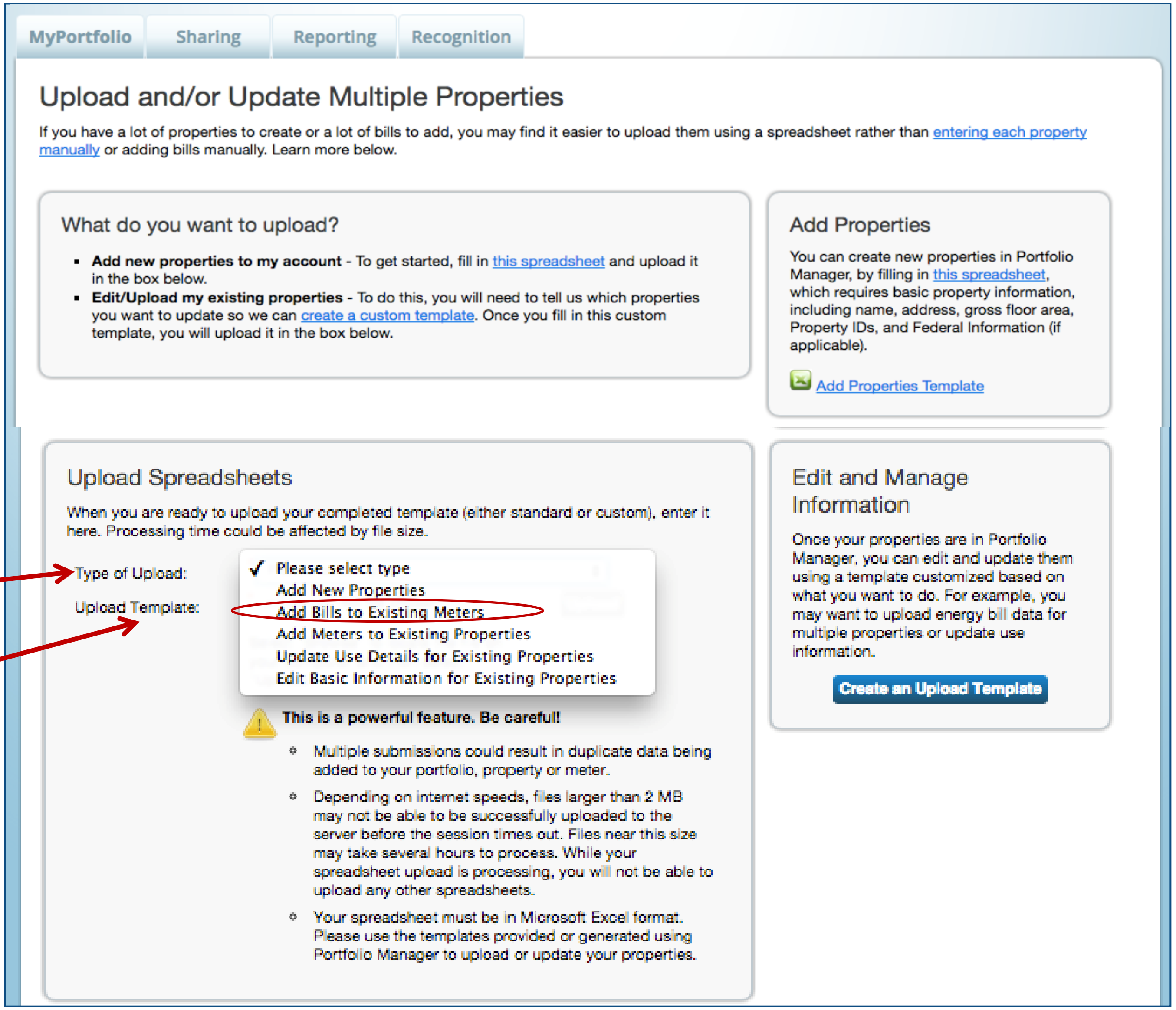
Add New Properties: Upload Completed Spreadsheet

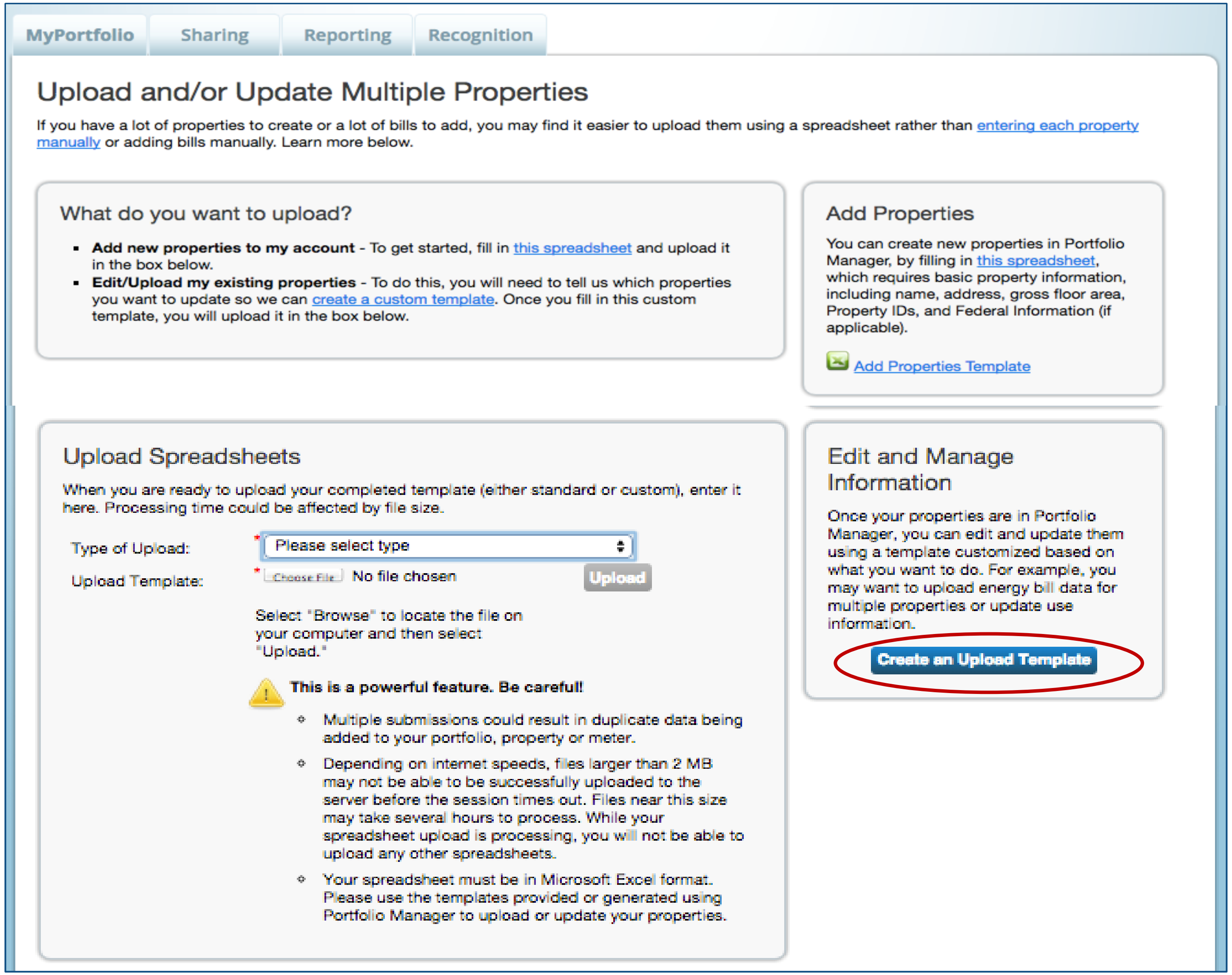
Upload filled out templates:

Select Template

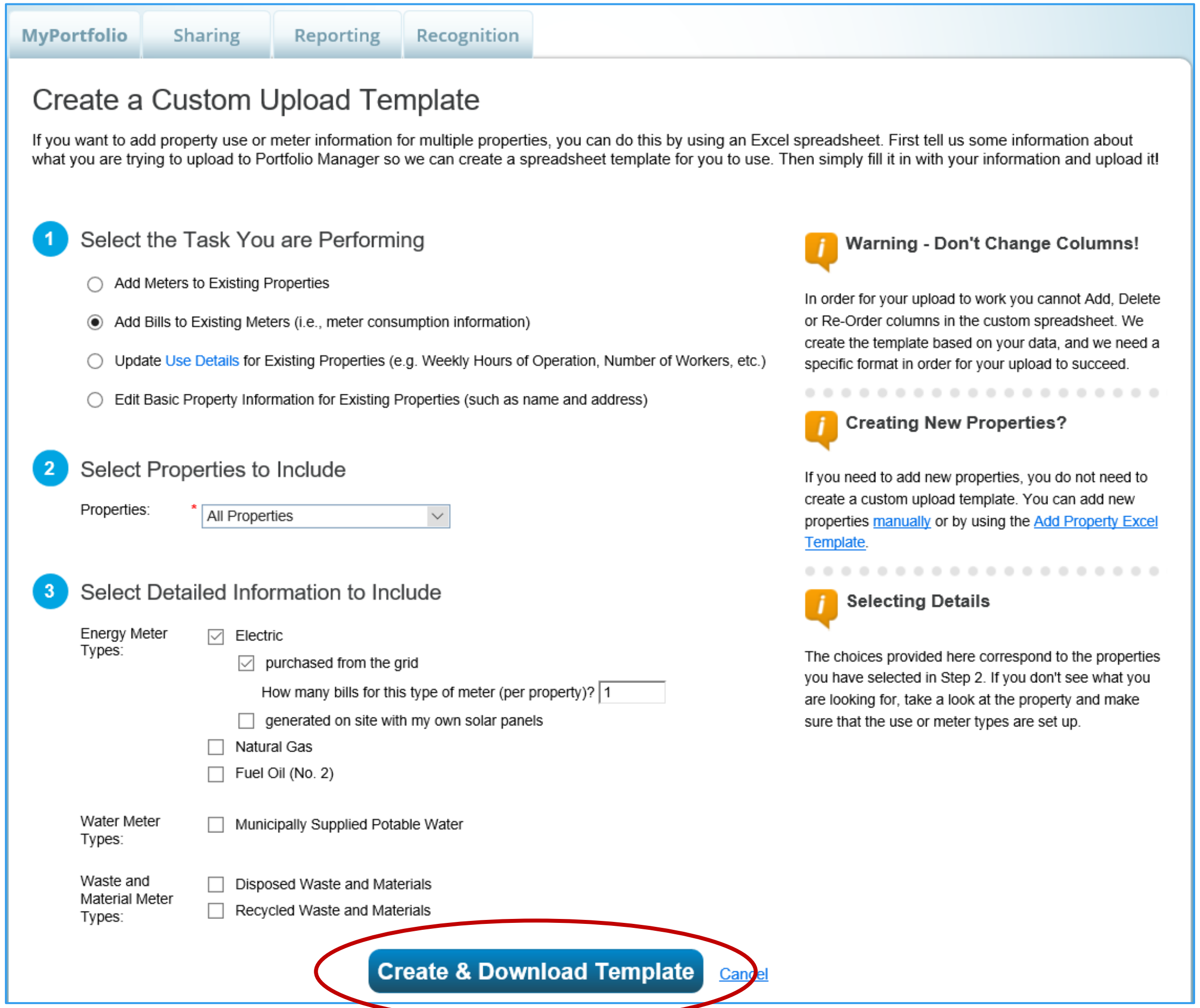
Upload



Add Meters/Add Bill Data/Edit Basic Property Info



Add Bills to Existing Meters: Create Custom Upload Template



MyPortfolio | Sharing | Reporting | Recognition

Create a Custom Upload Template

If you want to add property use or meter information for multiple properties, you can do this by using an Excel spreadsheet. First tell us some information about what you are trying to upload to Portfolio Manager so we can create a spreadsheet template for you to use. Then simply fill it in with your information and upload it!

1 Select the Task You are Performing

- ○ Add Meters to Existing Properties
- ◉ Add Bills to Existing Meters (i.e., meter consumption information)
- ○ Update Use Details for Existing Properties (e.g. Weekly Hours of Operation, Number of Workers, etc.)
- ○ Edit Basic Property Information for Existing Properties (such as name and address)

2 Select Properties to Include

Properties: * All Properties

3 Select Detailed Information to Include

Energy Meter Types:
- ☑ Electric
  - ☑ purchased from the grid
    - How many bills for this type of meter (per property)? 1
  - ☐ generated on site with my own solar panels
- ☐ Natural Gas
- ☐ Fuel Oil (No. 2)

Water Meter Types:
- ☐ Municipally Supplied Potable Water

Waste and Material Meter Types:
- ☐ Disposed Waste and Materials
- ☐ Recycled Waste and Materials

Create & Download Template Cancel

Warning - Don't Change Columns!

In order for your upload to work you cannot Add, Delete or Re-Order columns in the custom spreadsheet. We create the template based on your data, and we need a specific format in order for your upload to succeed.

Creating New Properties?

If you need to add new properties, you do not need to create a custom upload template. You can add new properties manually or by using the Add Property Excel Template.

Selecting Details

The choices provided here correspond to the properties you have selected in Step 2. If you don't see what you are looking for, take a look at the property and make sure that the use or meter types are set up.

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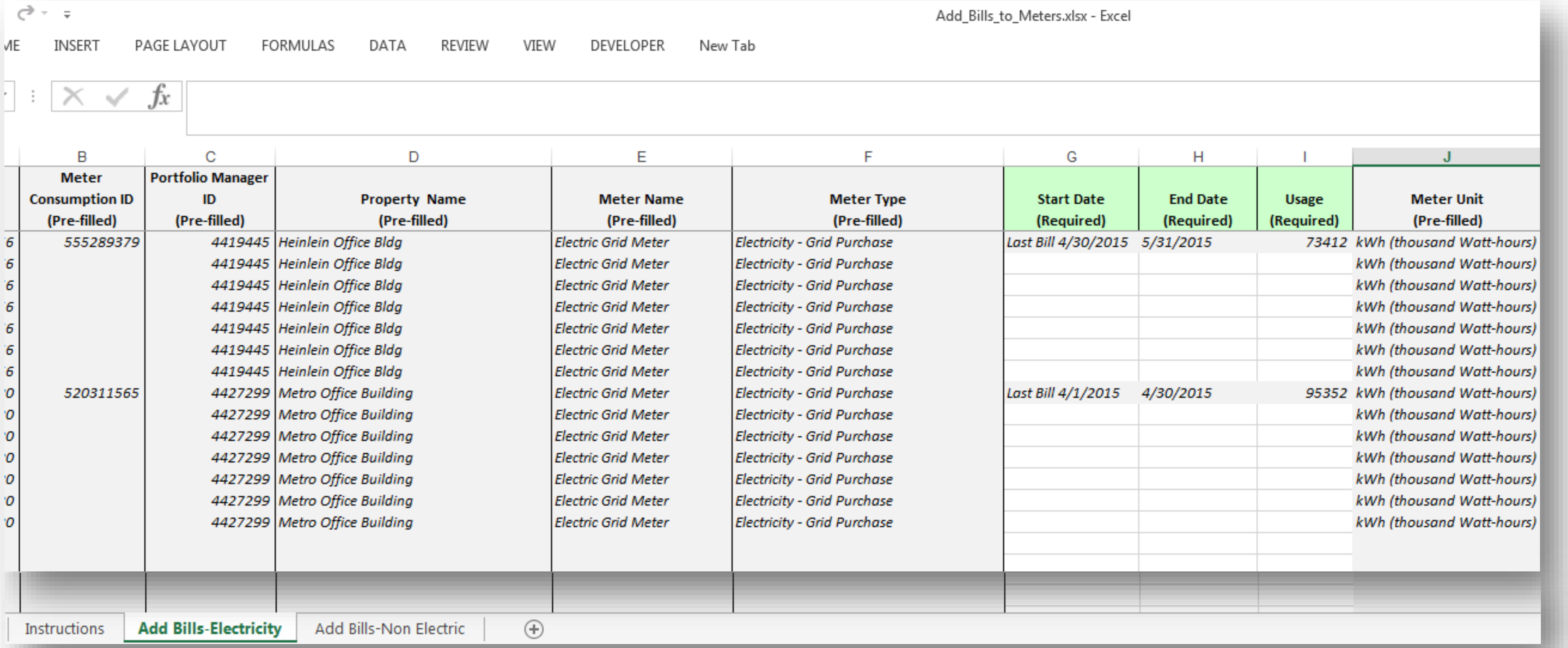

Add_Bills_to_Meters.xlsx - Excel

ME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW DEVELOPER New Tab

	Meter Consumption ID (Pre-filled)	Portfolio Manager ID (Pre-filled)	Property Name (Pre-filled)	Meter Name (Pre-filled)	Meter Type (Pre-filled)	Start Date (Required)	End Date (Required)	Usage (Required)	Meter Unit (Pre-filled)
6	555289379	4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase	Last Bill 4/30/2015	5/31/2015	73412	kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0	520311565	4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase	Last Bill 4/1/2015	4/30/2015	95352	kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)

Instructions | Add Bills-Electricity | Add Bills-Non Electric

- Read the Instructions tab.
- At a minimum, complete the green required fields.
- Don’t make any format changes to the spreadsheet.

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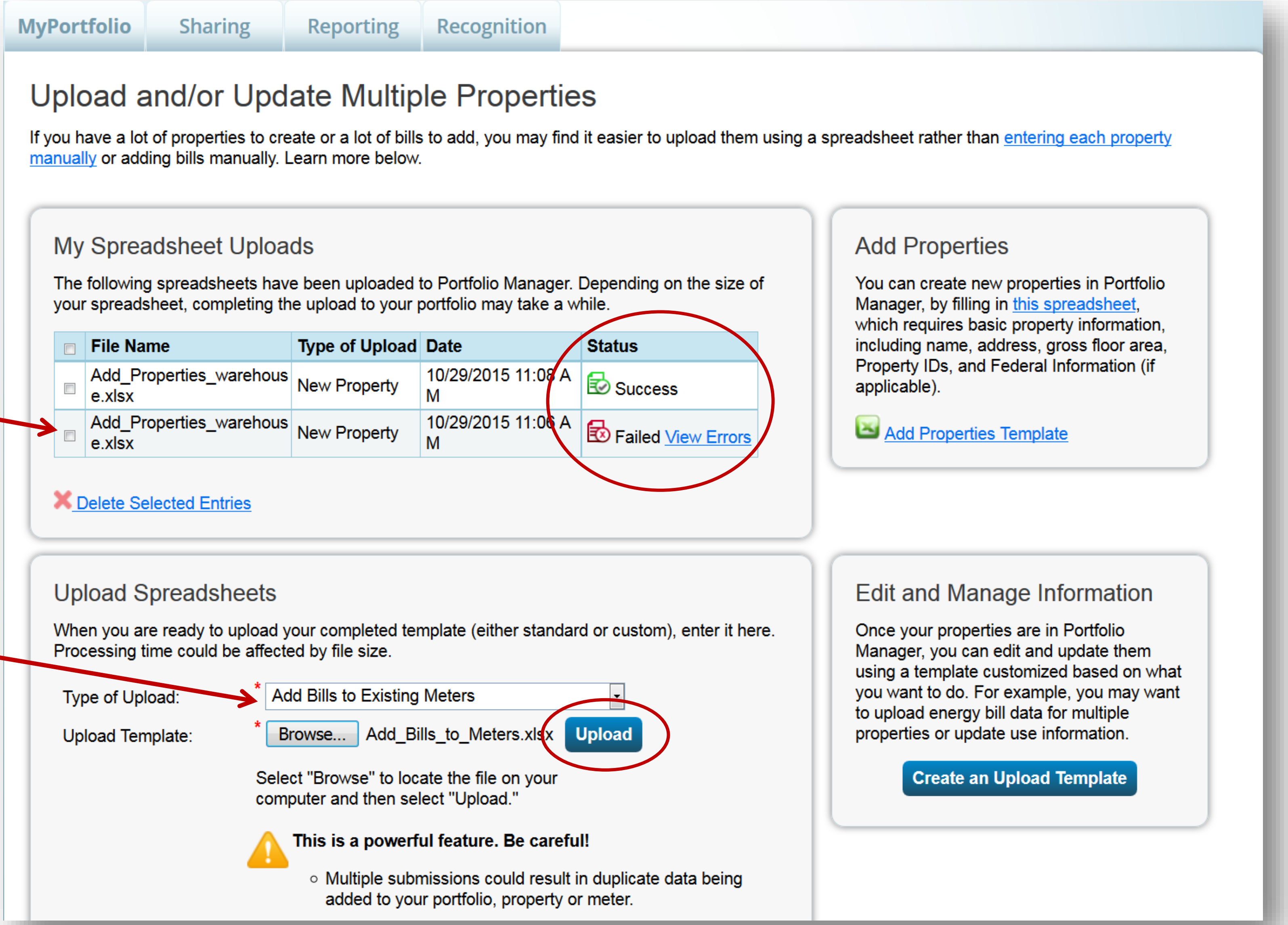
Status of upload appears here

Select the upload type then "Upload"



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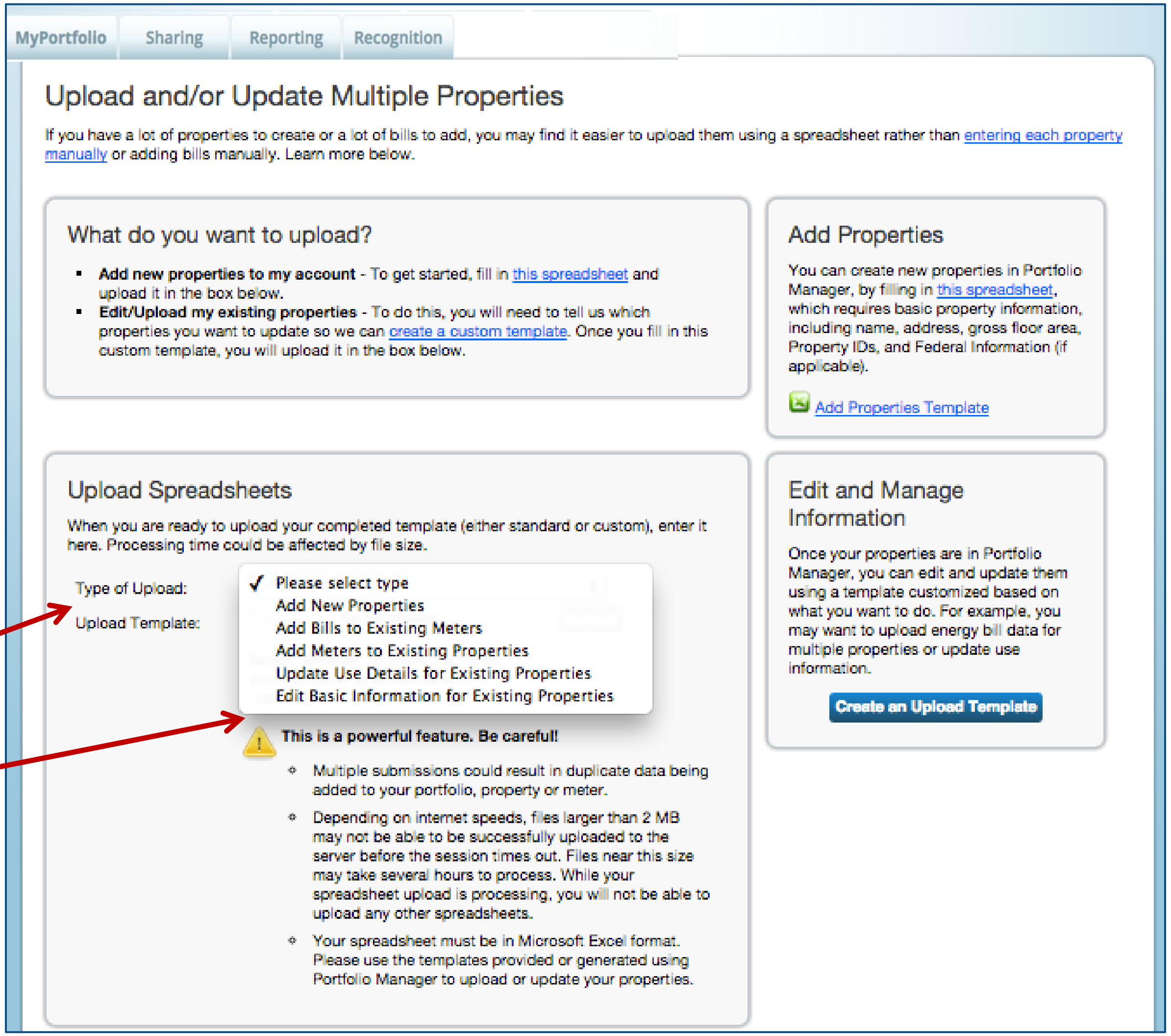
Add Bills to Existing Meters: Upload Spreadsheet



Upload filled out templates:

Select Template

Upload

Pop Quiz!

1. When using the spreadsheet upload feature, you should do which of the following?
   a. Use the template provided in Portfolio Manager without making any changes to the format of the spreadsheet
   b. Use your own template
   c. Only fill out some of the required fields
   d. Use formulas for numeric values

Pop Quiz!

1. When using the spreadsheet upload feature, you should do which of the following?
   a. Use the template provided in Portfolio Manager without making any changes to the format of the spreadsheet
   b. Use your own template
   c. Only fill out some of the required fields
   d. Use formulas for numeric values

Using a different template, only filling out some required fields, or changing formatting or formulas can prevent your upload from being successful.

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Set a Portfolio Baseline and/or Target

Manage Portfolio

Transfer ownership of a property that you manage to another Portfolio Manager user.

Upload and/or update multiple properties at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.

Download your entire portfolio to Excel or create a custom download.

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

Add sample properties to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.

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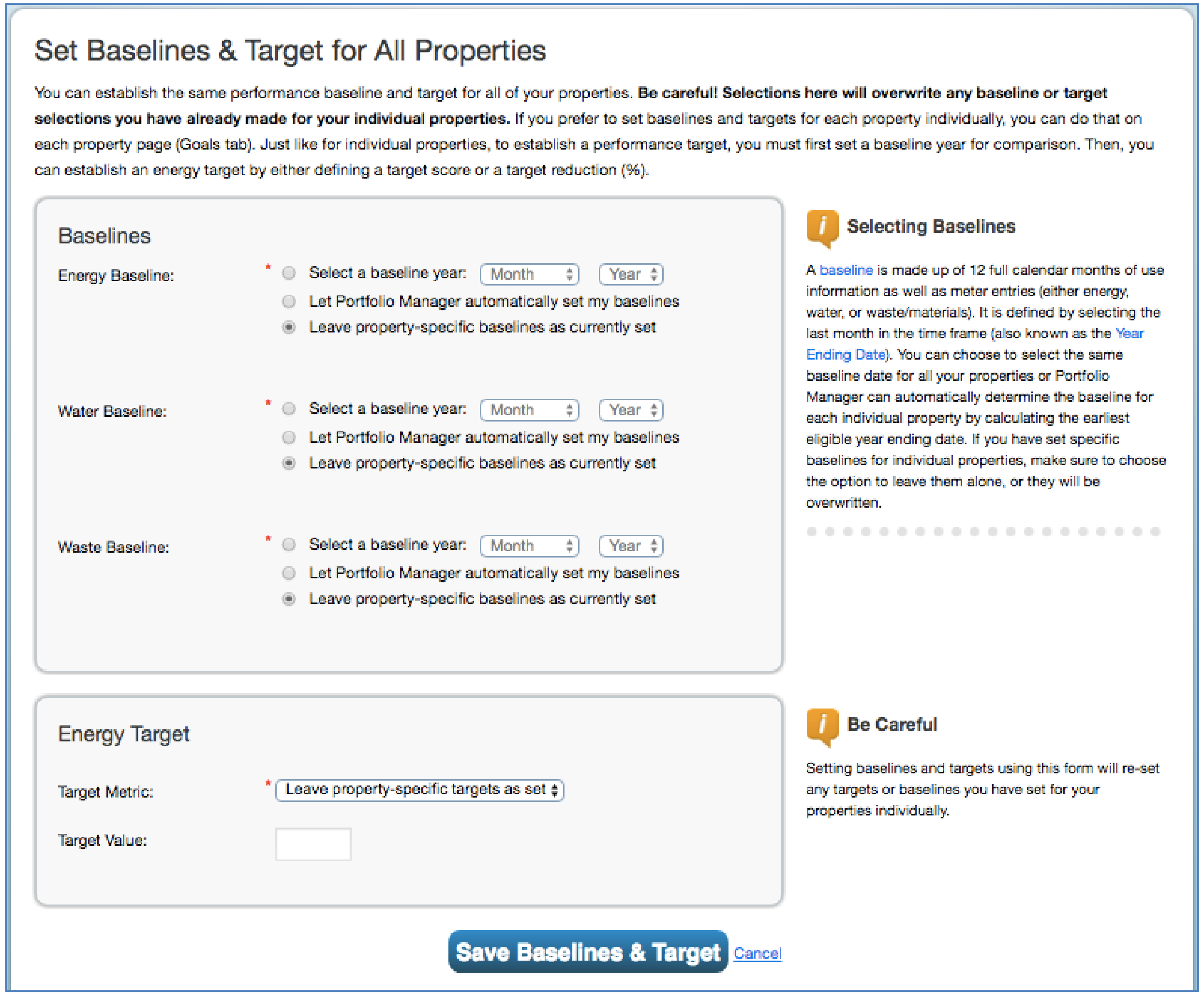
Set One Baseline and Target for All Properties



Set Baselines & Target for All Properties

You can establish the same performance baseline and target for all of your properties. **Be careful! Selections here will overwrite any baseline or target selections you have already made for your individual properties.** If you prefer to set baselines and targets for each property individually, you can do that on each property page (Goals tab). Just like for individual properties, to establish a performance target, you must first set a baseline year for comparison. Then, you can establish an energy target by either defining a target score or a target reduction (%).

Baselines

Energy Baseline: *
- Select a baseline year: Month Year
- Let Portfolio Manager automatically set my baselines
- Leave property-specific baselines as currently set

Water Baseline: *
- Select a baseline year: Month Year
- Let Portfolio Manager automatically set my baselines
- Leave property-specific baselines as currently set

Waste Baseline: *
- Select a baseline year: Month Year
- Let Portfolio Manager automatically set my baselines
- Leave property-specific baselines as currently set

Selecting Baselines

A baseline is made up of 12 full calendar months of use information as well as meter entries (either energy, water, or waste/materials). It is defined by selecting the last month in the time frame (also known as the Year Ending Date). You can choose to select the same baseline date for all your properties or Portfolio Manager can automatically determine the baseline for each individual property by calculating the earliest eligible year ending date. If you have set specific baselines for individual properties, make sure to choose the option to leave them alone, or they will be overwritten.

Energy Target

Target Metric: * Leave property-specific targets as set

Target Value:

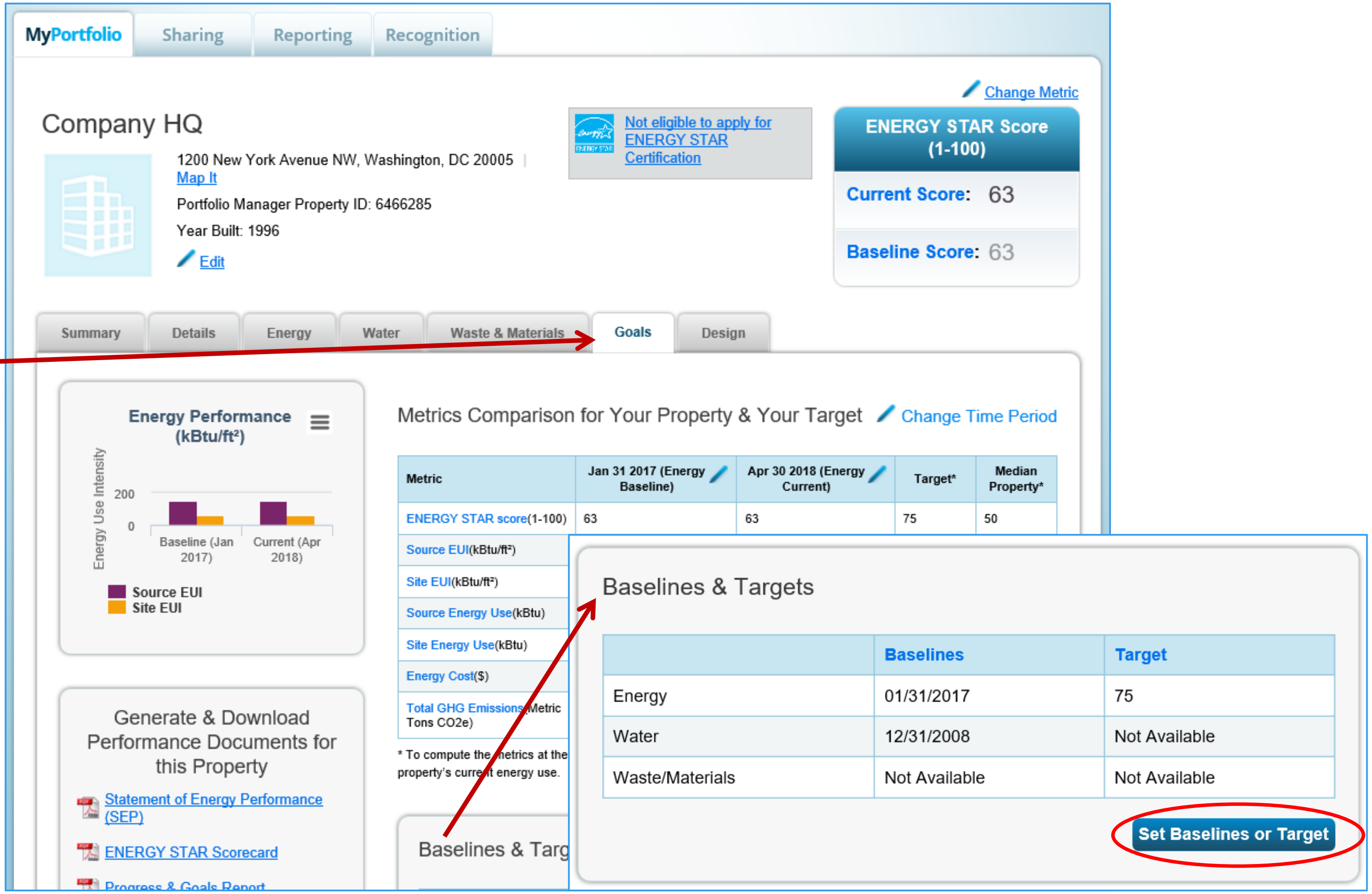
Be Careful

Setting baselines and targets using this form will re-set any targets or baselines you have set for your properties individually.

Save Baselines & Target Cancel

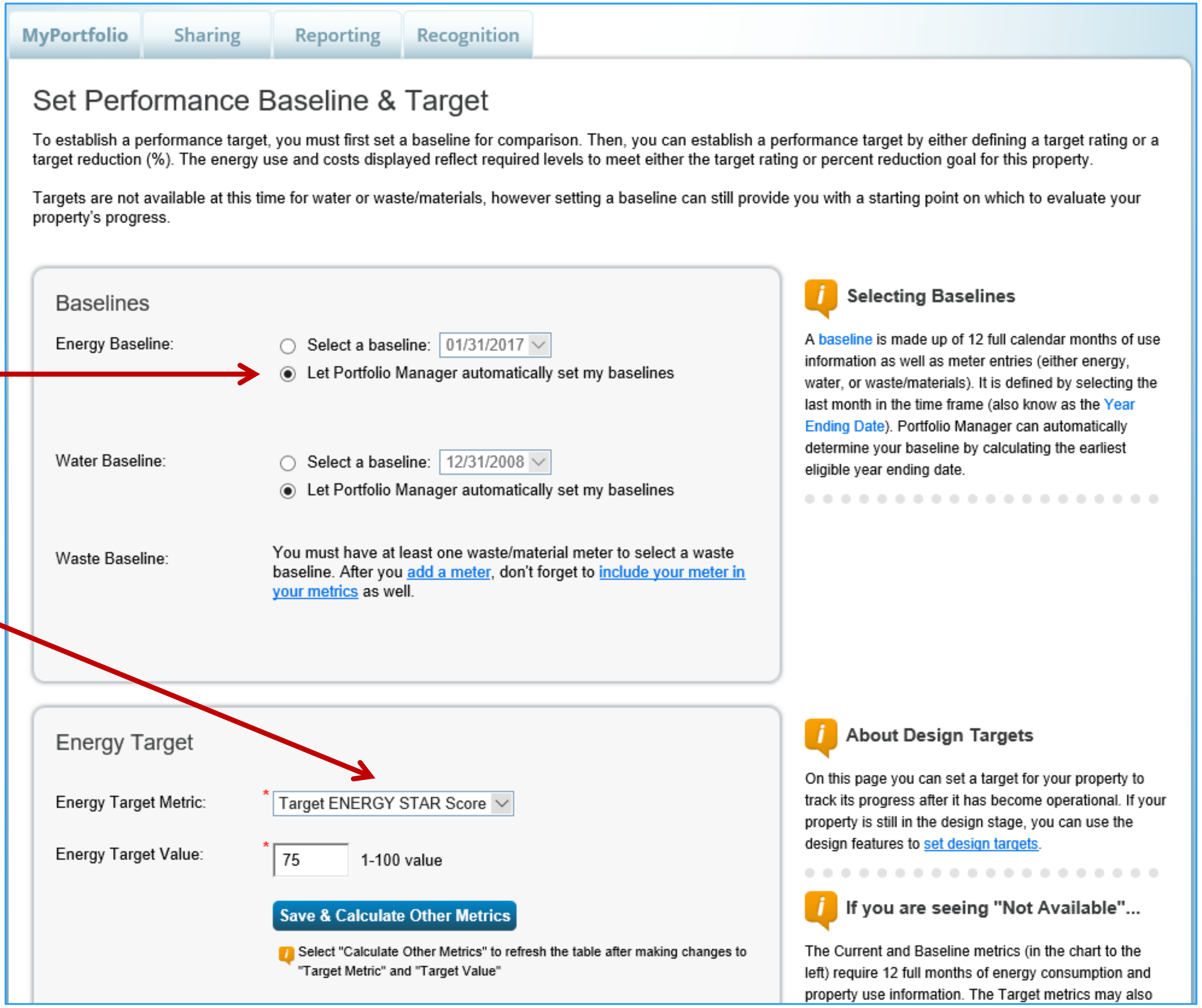
Property Goals Tab: View Specific Property Goals & Improvements

Goals tab at the Property level



Add/Edit Baselines or Targets

Choose baselines or let Portfolio Manager select automatically



<u>Target Options</u>

- **Target ENERGY STAR Score**
- **Target % Better than Baseline Source EUI**
- **Target % Better than Median Source EUI**

Pop Quiz!

2. True or False: When setting energy and water baselines, you must select the same date for all properties in your Portfolio Manager account.
    a. True
    b. False

Pop Quiz!

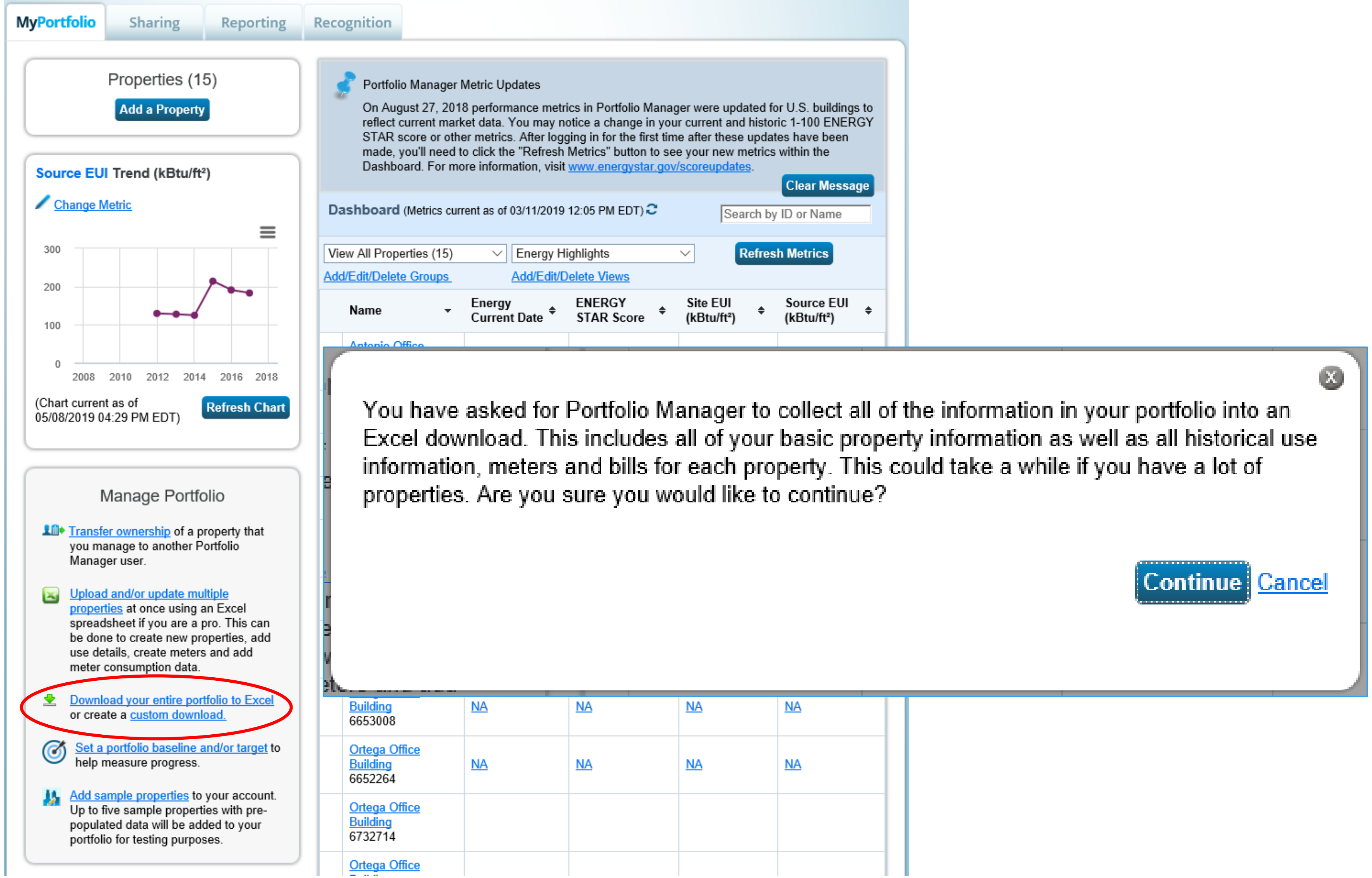
2. True or False: When setting energy and water baselines, you must select the same date for all properties in your Portfolio Manager account.
   a. True
   b. False

You can choose to set baselines across your entire portfolio, or individually at the property level! At the portfolio level, you can select "Let Portfolio Manager automatically set my baselines" or "Leave property-specific baselines as currently set," which will apply different baselines according to what is in each property record.

How To

- Update data using spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reporting templates
- Use the Sustainable Buildings Checklist

Download Entire Portfolio



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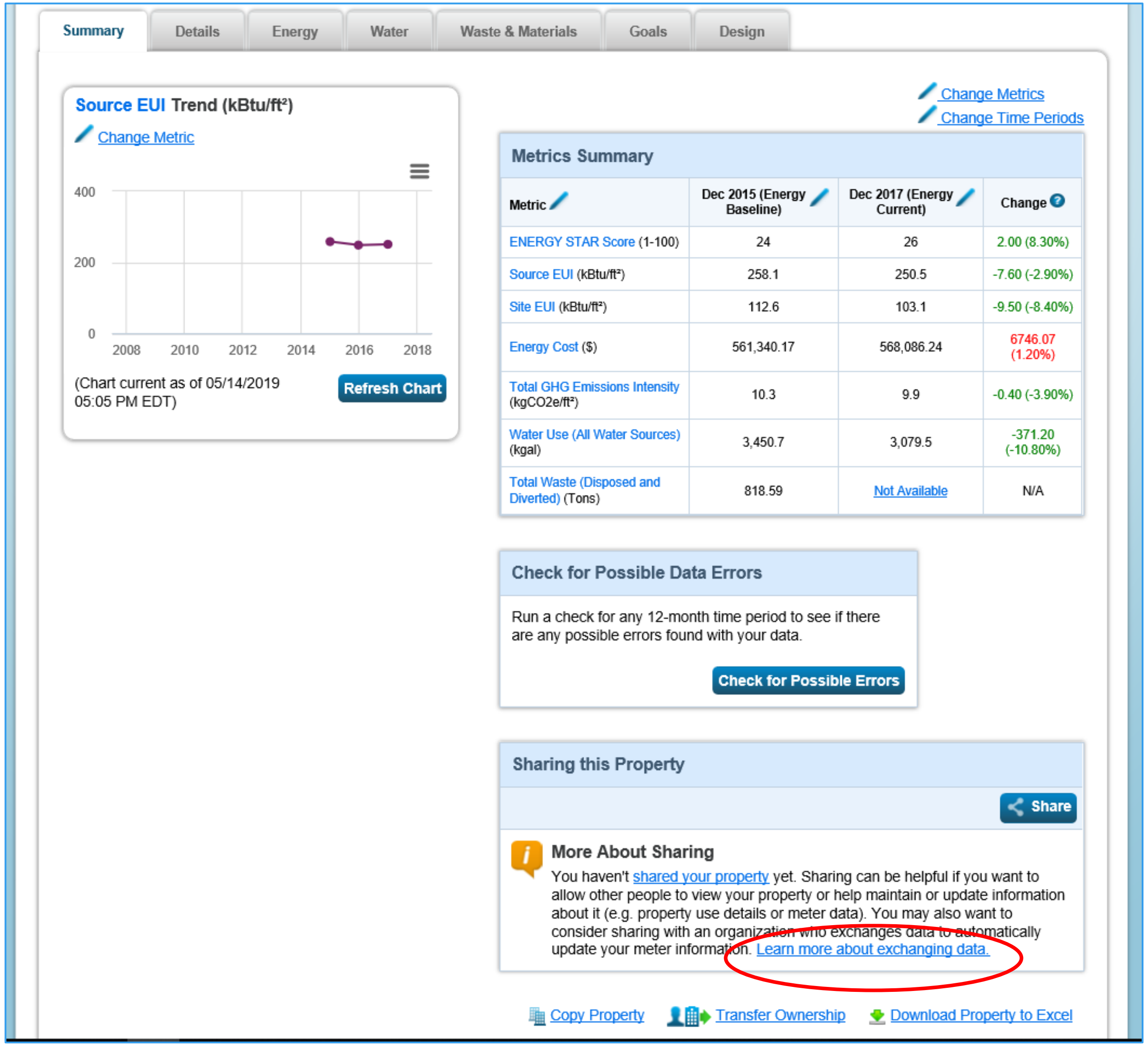
Download Property to Excel



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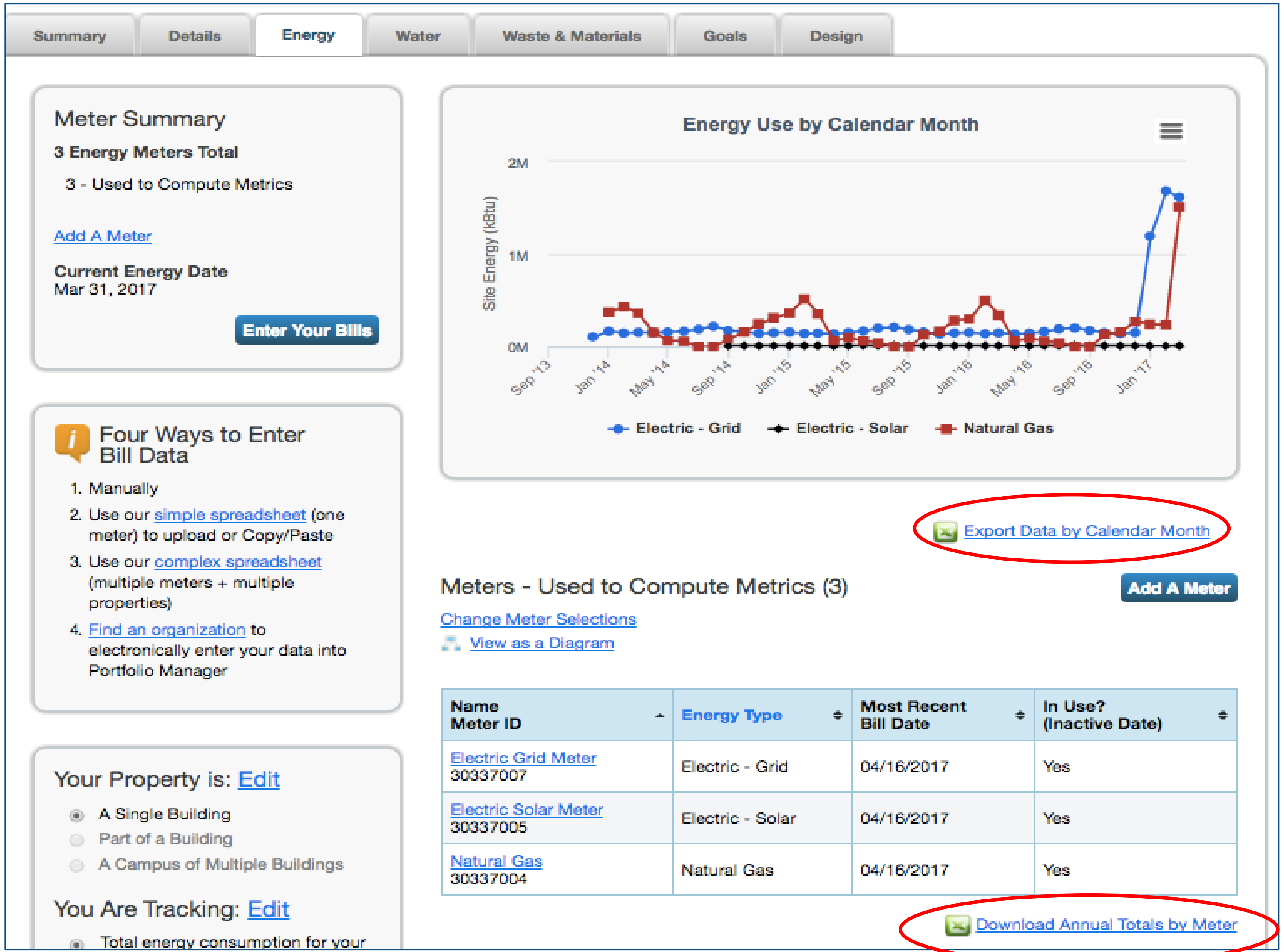
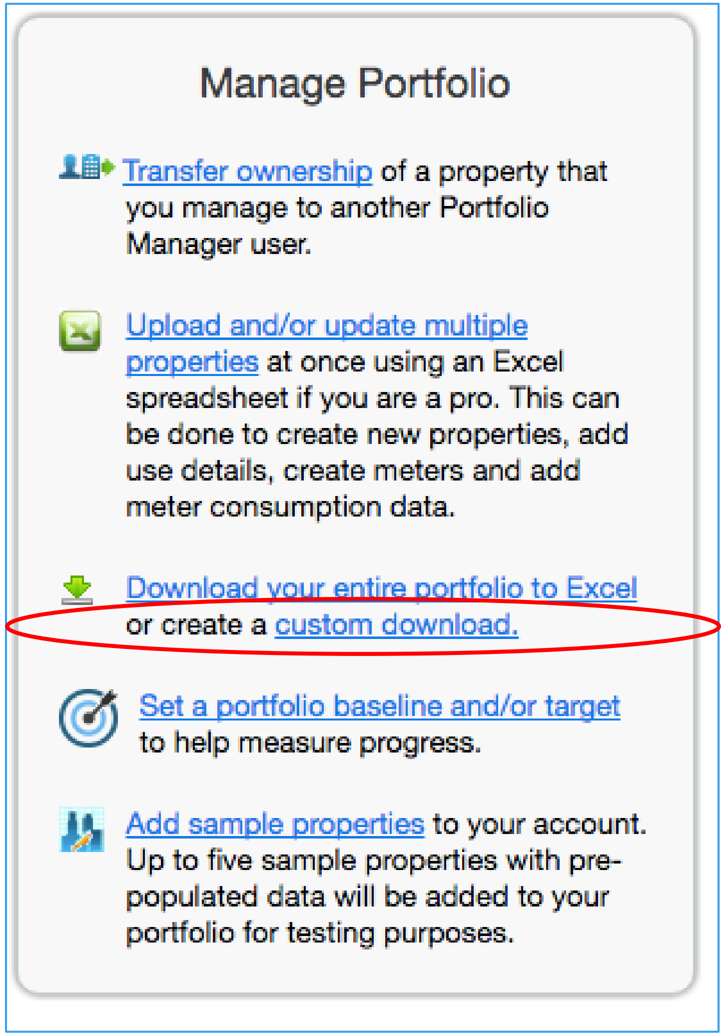
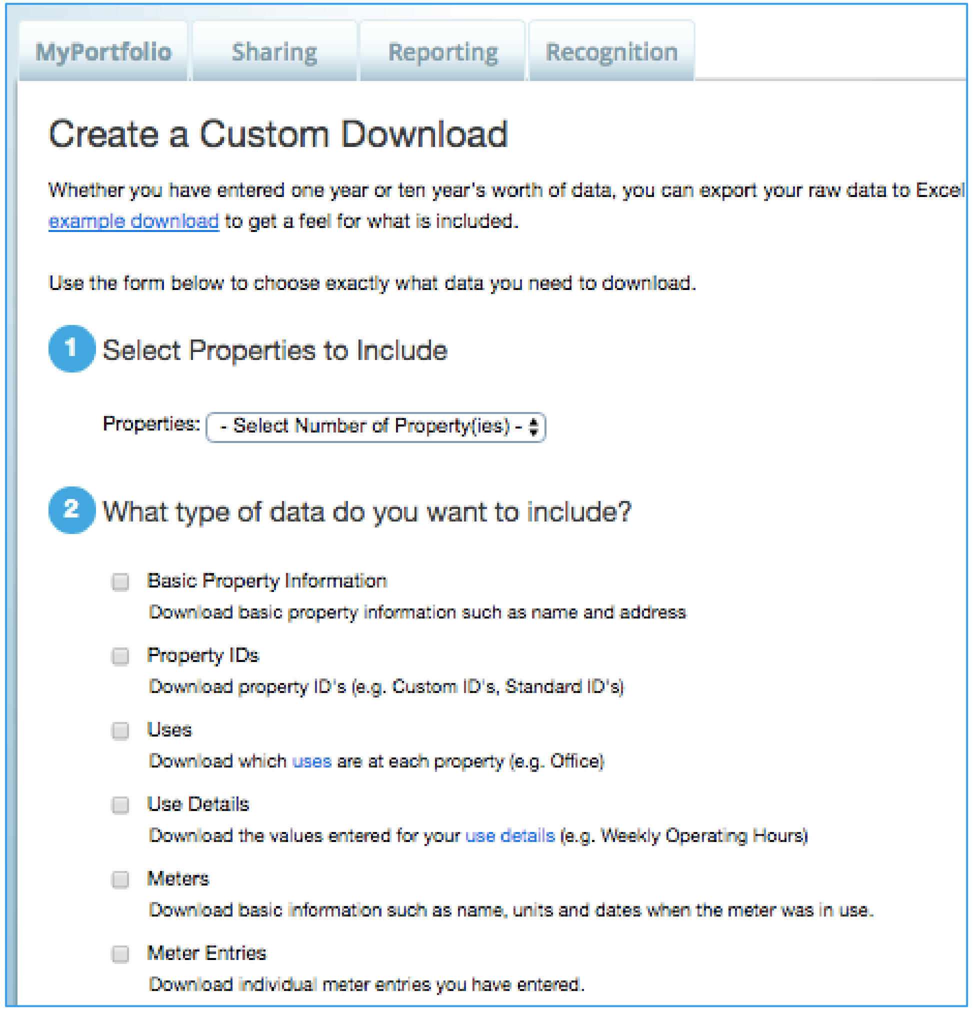
Energy Meter Tab



Manage Portfolio



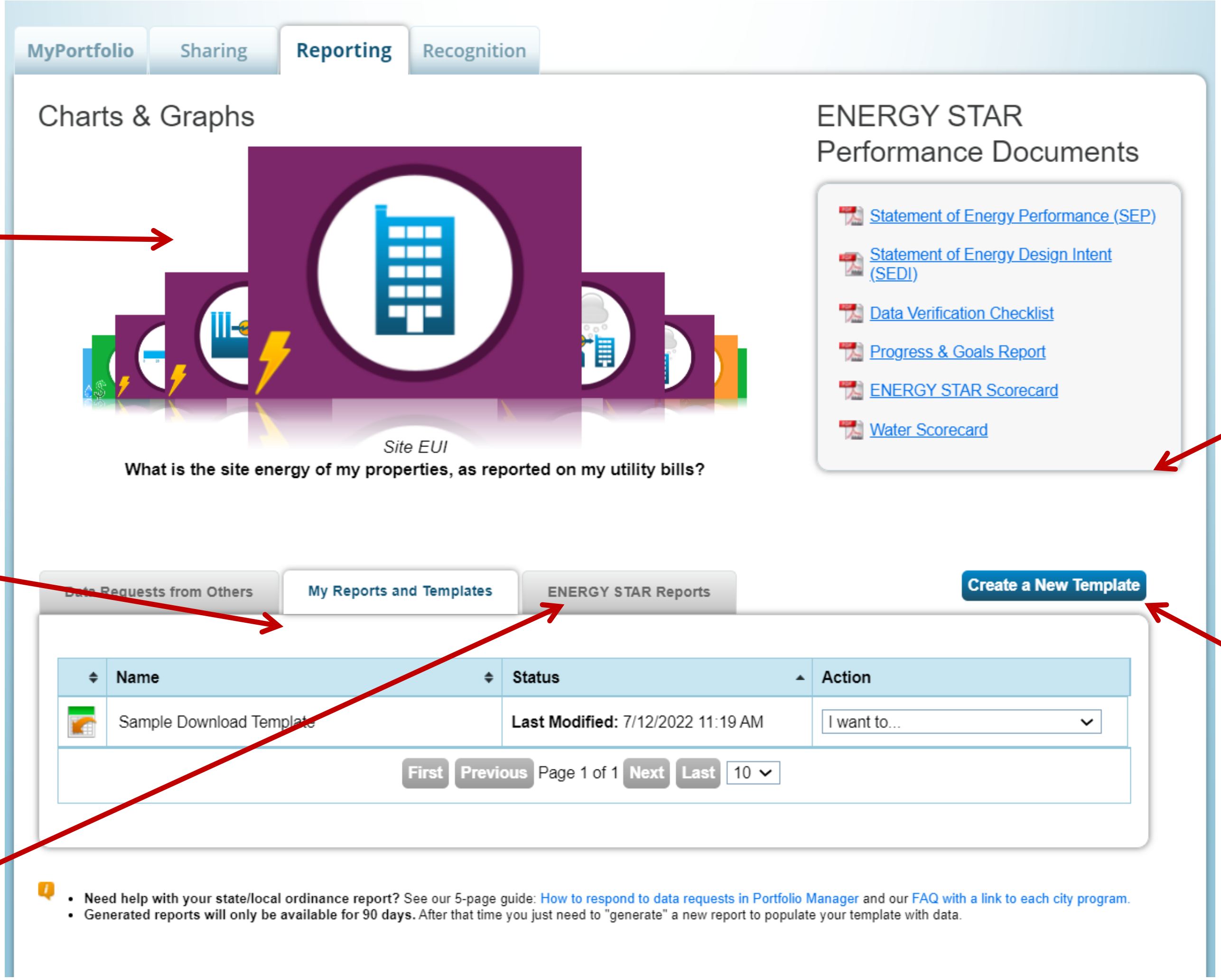


Analyze Progress and Performance on the Reporting Tab

Choose from Pre-set Chart & Graph Options

View and Use Custom Report Templates

View and Use Standard Reports

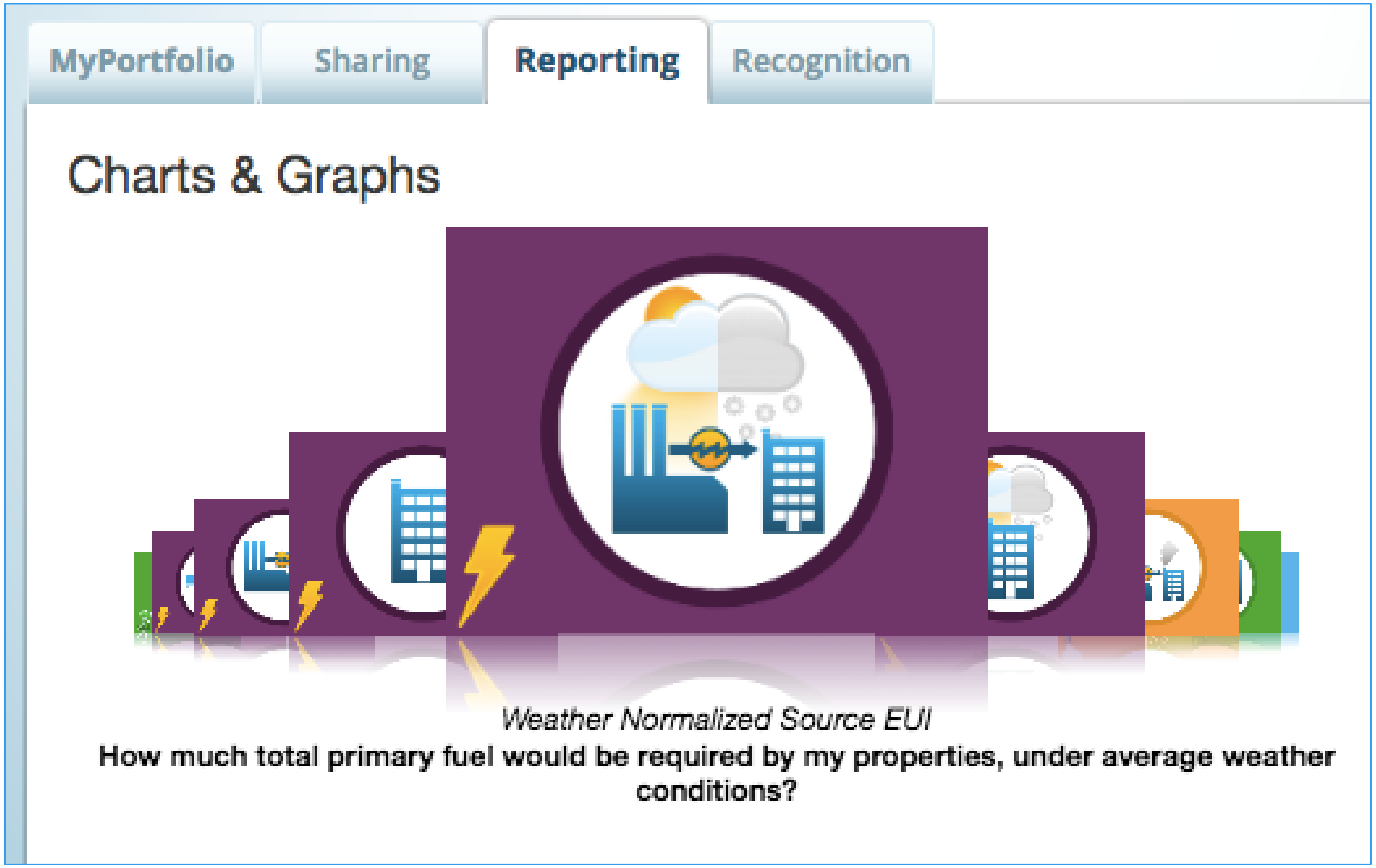


View and Download Performance Documents

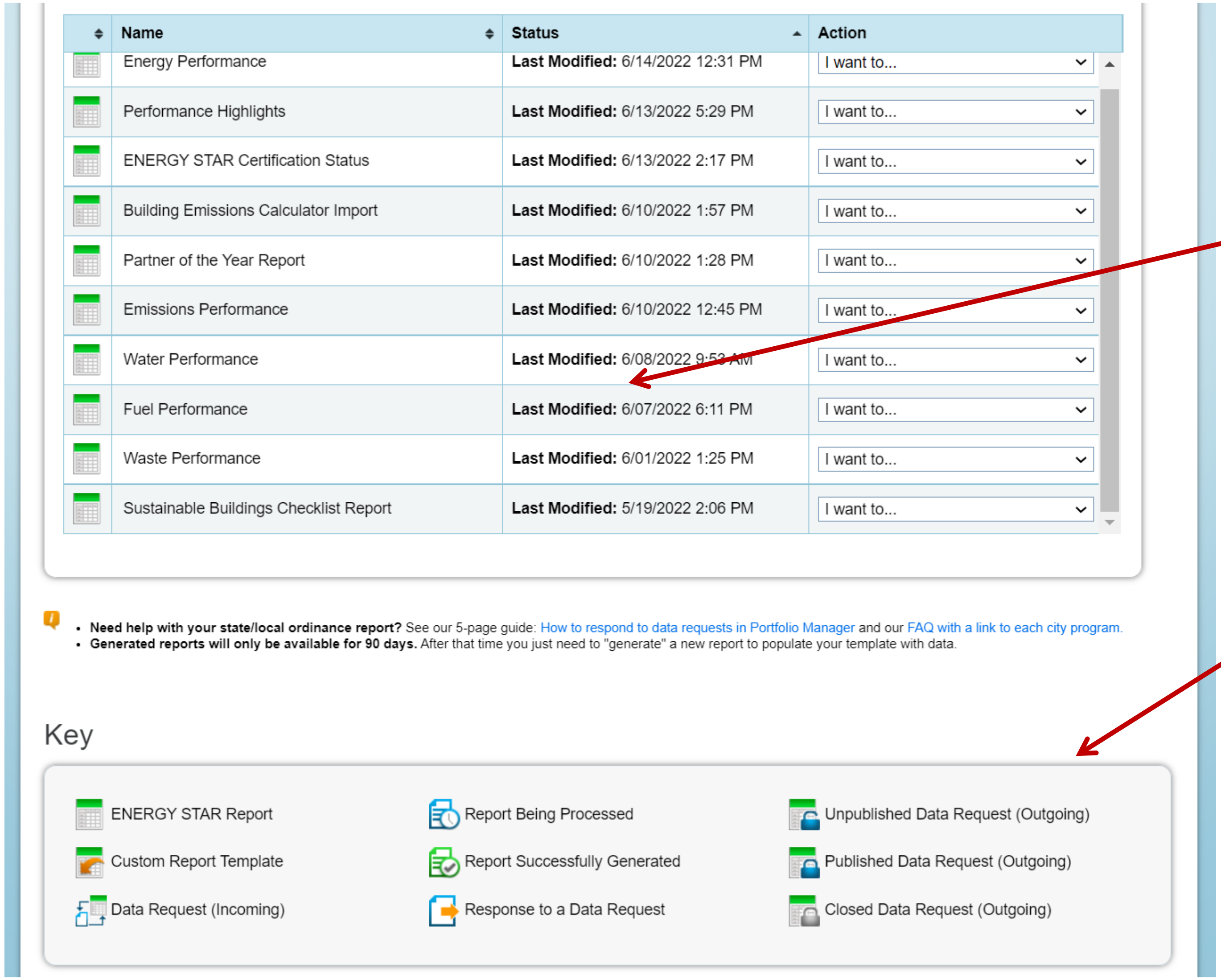
Generate Custom Report Templates

ENERGY STAR Performance Documents

Charts & Graphs



“Standard” ENERGY STAR Reports



	Name	Status	Action
	Energy Performance	**Last Modified:** 6/14/2022 12:31 PM	I want to...
	Performance Highlights	**Last Modified:** 6/13/2022 5:29 PM	I want to...
	ENERGY STAR Certification Status	**Last Modified:** 6/13/2022 2:17 PM	I want to...
	Building Emissions Calculator Import	**Last Modified:** 6/10/2022 1:57 PM	I want to...
	Partner of the Year Report	**Last Modified:** 6/10/2022 1:28 PM	I want to...
	Emissions Performance	**Last Modified:** 6/10/2022 12:45 PM	I want to...
	Water Performance	**Last Modified:** 6/08/2022 9:53 AM	I want to...
	Fuel Performance	**Last Modified:** 6/07/2022 6:11 PM	I want to...
	Waste Performance	**Last Modified:** 6/01/2022 1:25 PM	I want to...
	Sustainable Buildings Checklist Report	**Last Modified:** 5/19/2022 2:06 PM	I want to...

- **Need help with your state/local ordinance report?** See our 5-page guide: How to respond to data requests in Portfolio Manager and our FAQ with a link to each city program.
- **Generated reports will only be available for 90 days.** After that time you just need to "generate" a new report to populate your template with data.

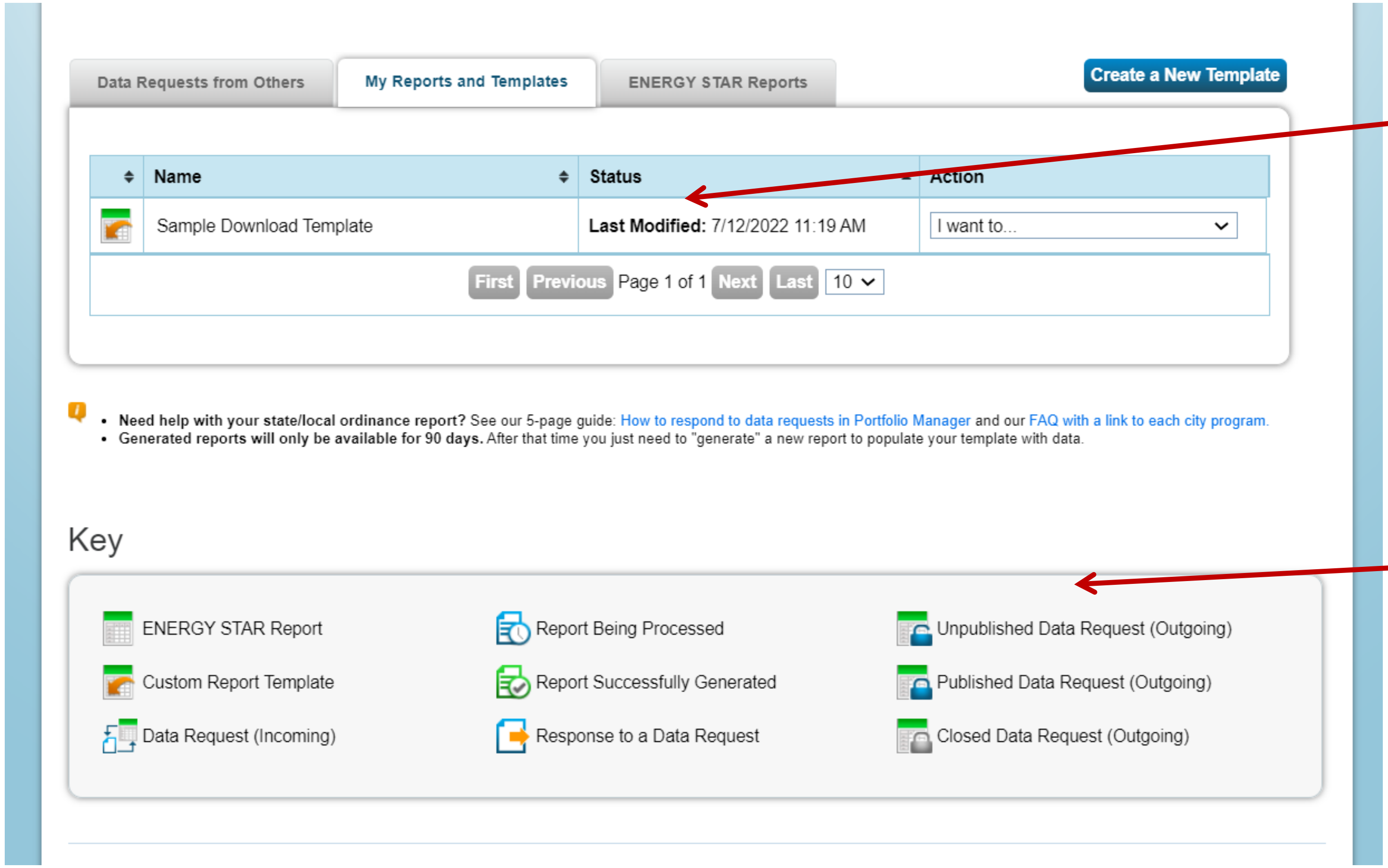
Key

ENERGY STAR Report	Report Being Processed	Unpublished Data Request (Outgoing)
Custom Report Template	Report Successfully Generated	Published Data Request (Outgoing)
Data Request (Incoming)	Response to a Data Request	Closed Data Request (Outgoing)

Important Information Called Out in Bold

New Key Explains Report Icons

Custom Reports

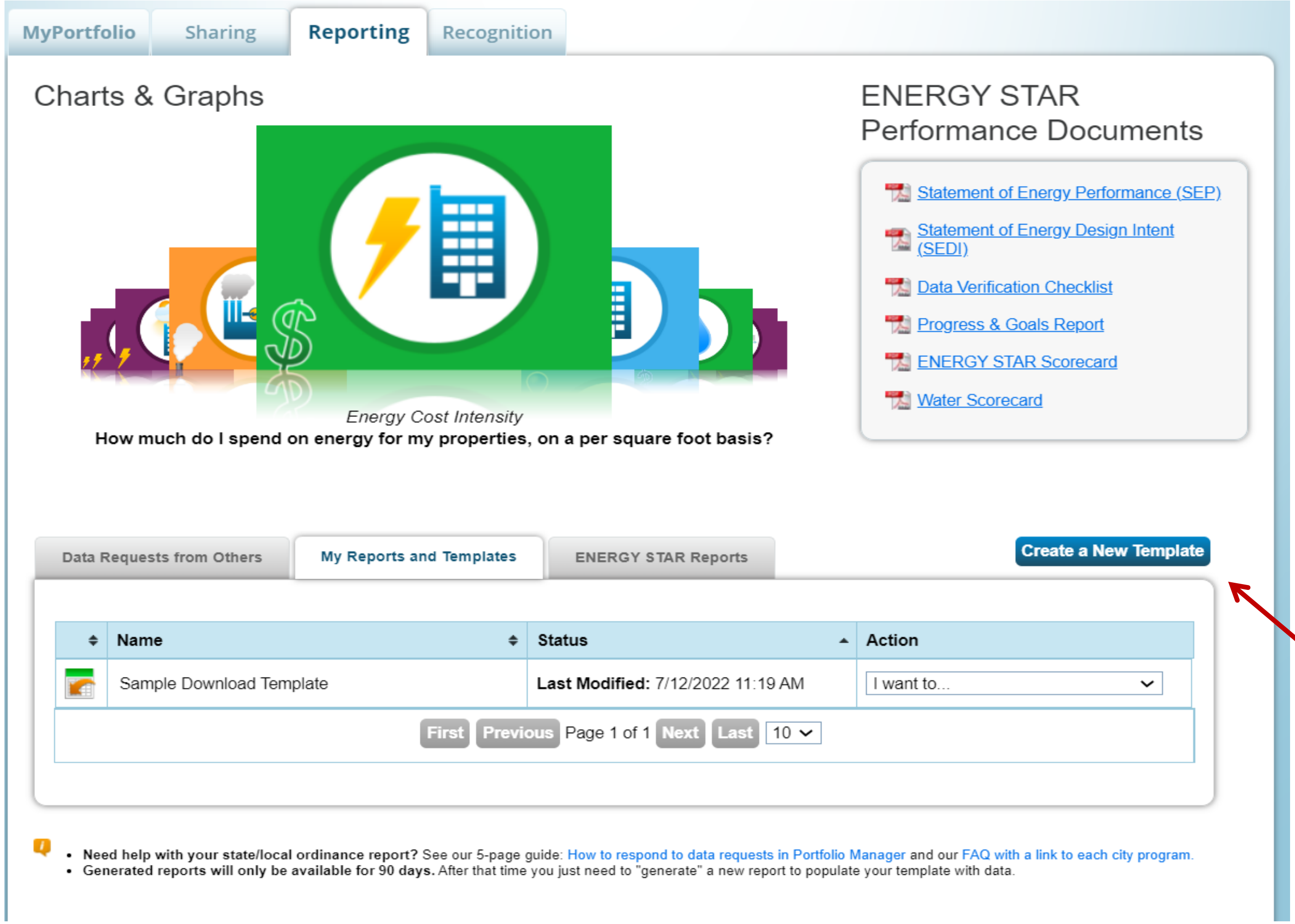


Important Information Called Out in Bold

New Key Explains Report Icons

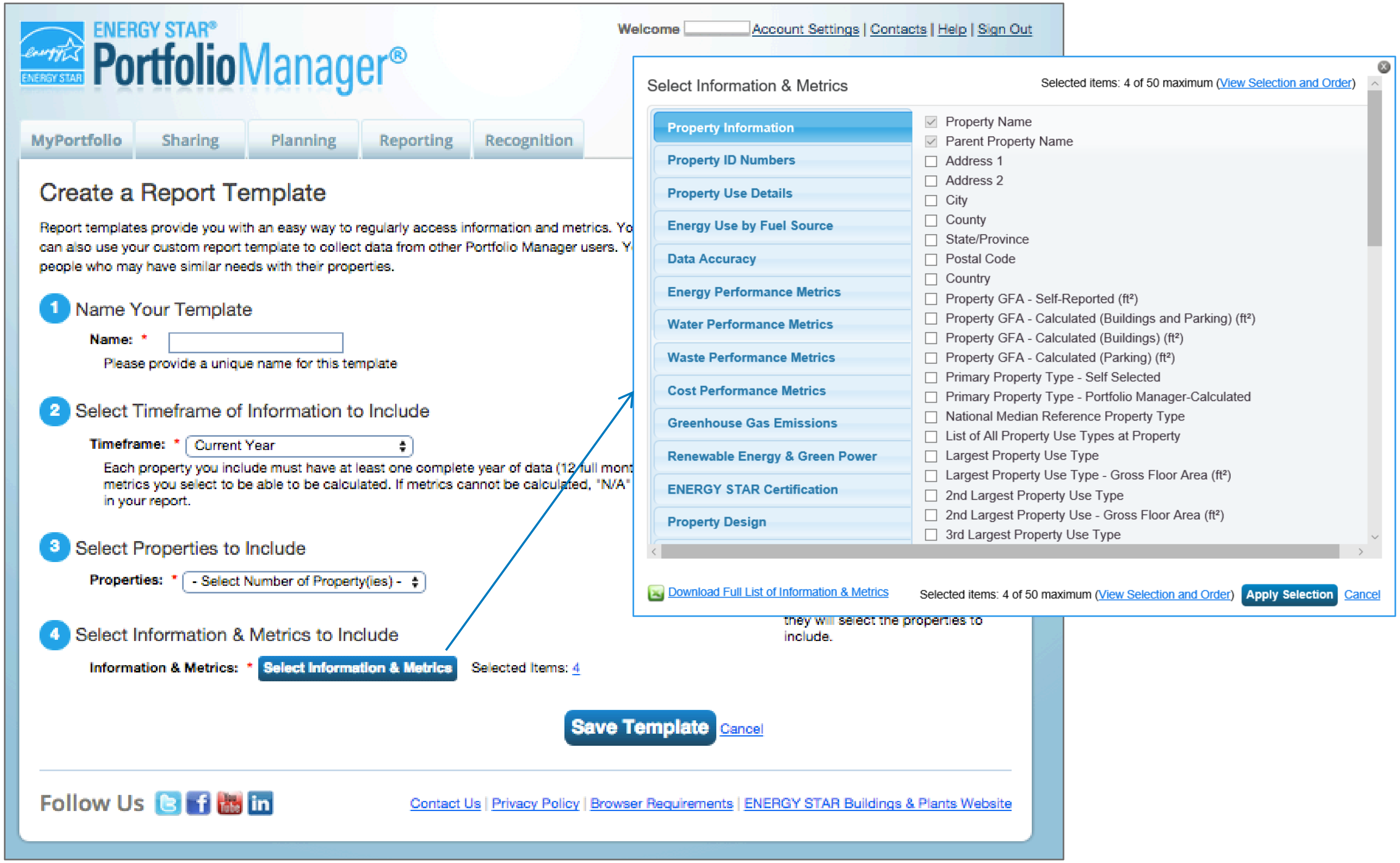
ENERGY STAR

Custom Reporting

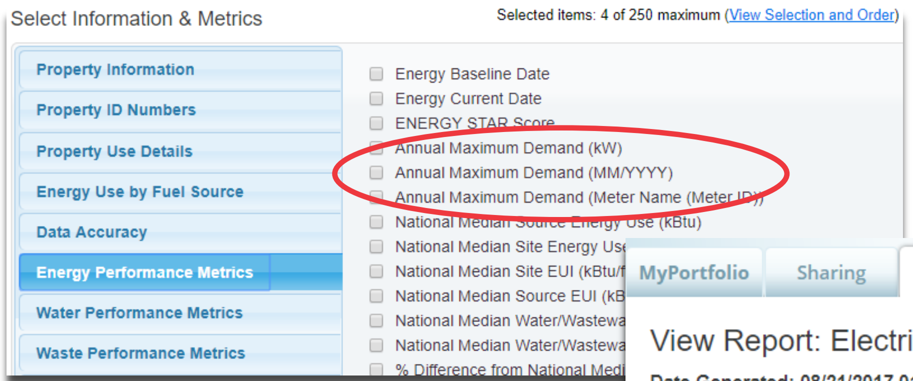


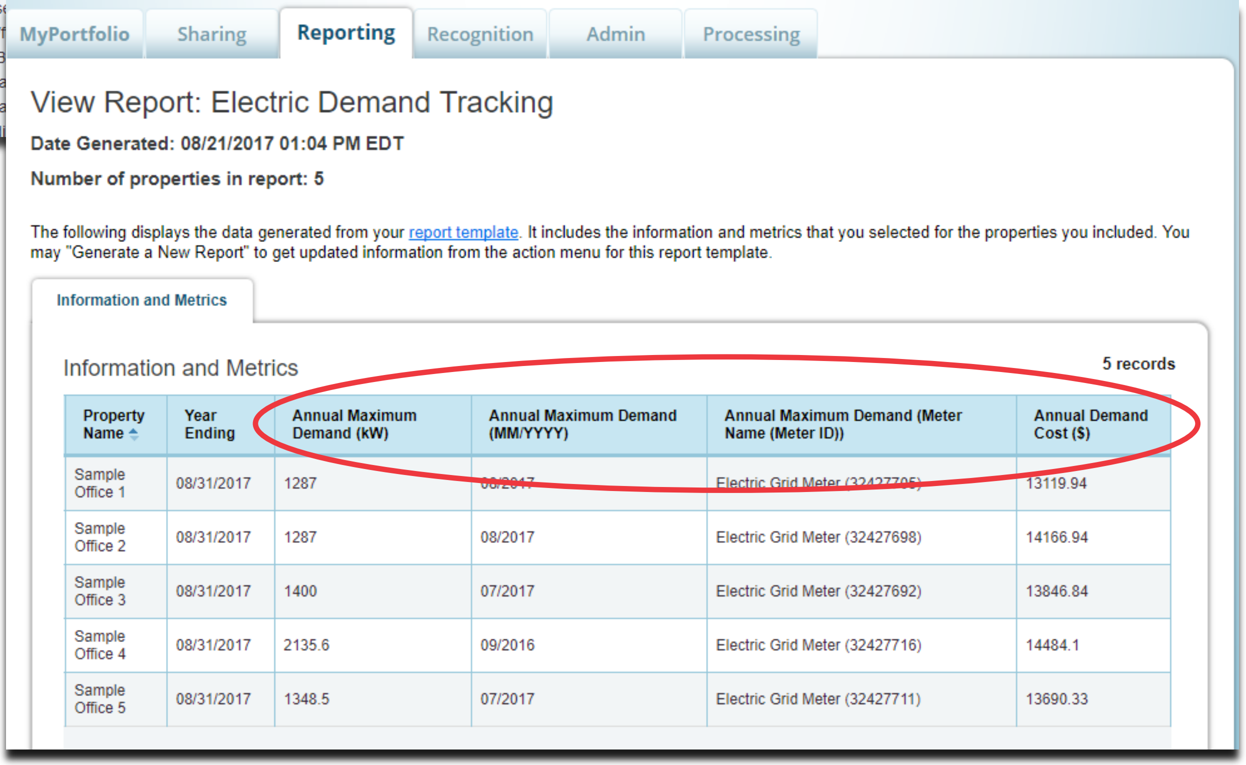
Generate Custom Report Templates

Custom Templates



Electric Demand Metrics also available in custom reports





View Report: Electric Demand Tracking

Date Generated: 08/21/2017 01:04 PM EDT

Number of properties in report: 5

The following displays the data generated from your report template. It includes the information and metrics that you selected for the properties you included. You may "Generate a New Report" to get updated information from the action menu for this report template.

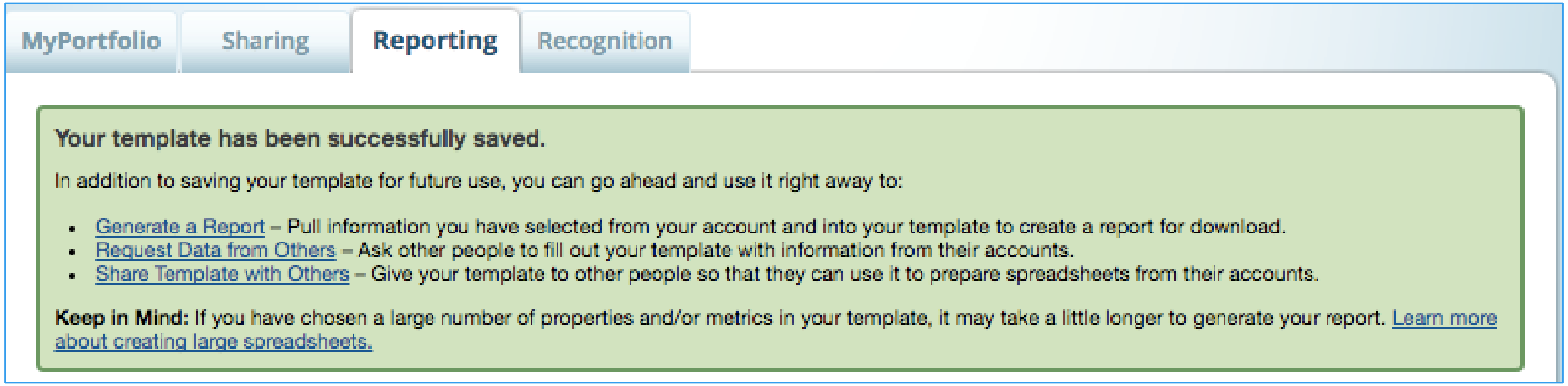
Information and Metrics

Information and Metrics

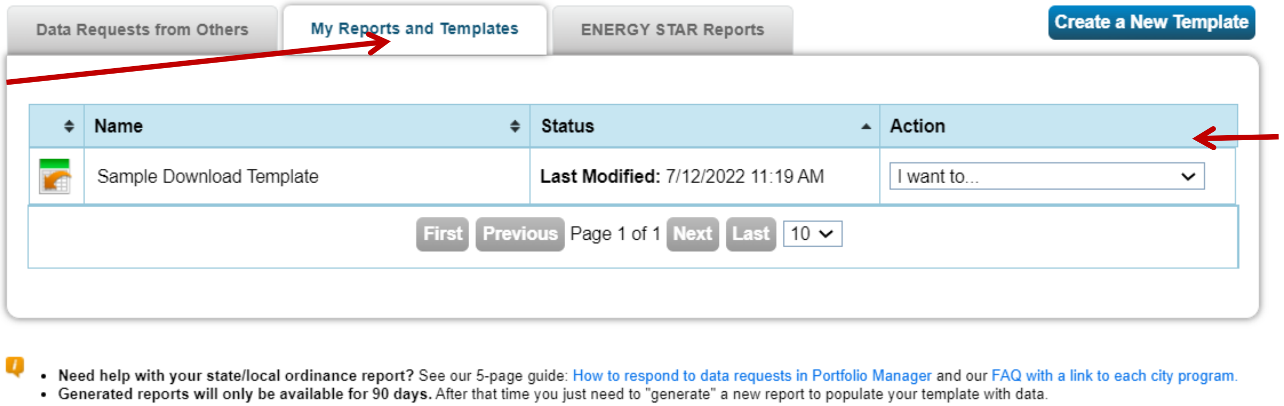
5 records

Property Name	Year Ending	Annual Maximum Demand (kW)	Annual Maximum Demand (MM/YYYY)	Annual Maximum Demand (Meter Name (Meter ID))	Annual Demand Cost ($)
Sample Office 1	08/31/2017	1287	08/2017	Electric Grid Meter (32427705)	13119.94
Sample Office 2	08/31/2017	1287	08/2017	Electric Grid Meter (32427698)	14166.94
Sample Office 3	08/31/2017	1400	07/2017	Electric Grid Meter (32427692)	13846.84
Sample Office 4	08/31/2017	2135.6	09/2016	Electric Grid Meter (32427716)	14484.1
Sample Office 5	08/31/2017	1348.5	07/2017	Electric Grid Meter (32427711)	13690.33

Use Your Template

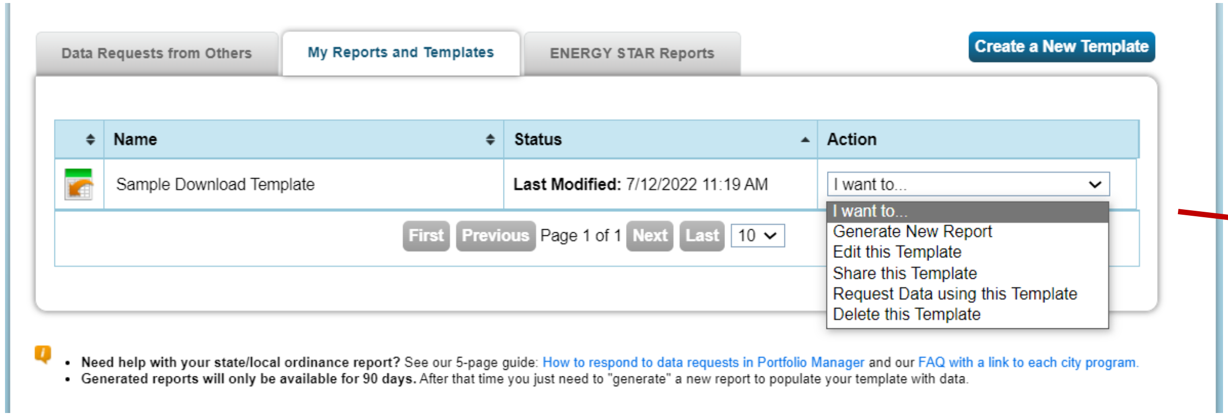


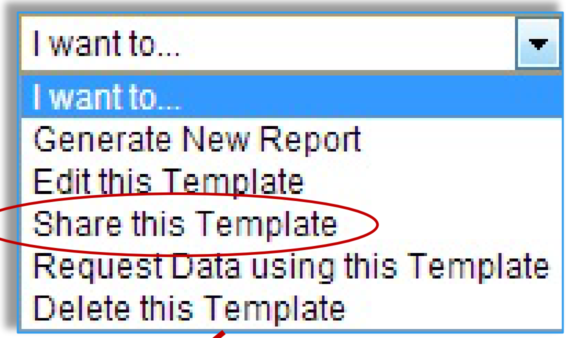
New template appears on "My Reports and Template" tab



Click links or use drop-down menu to share your template with others, request data from other users, or generate a spreadsheet

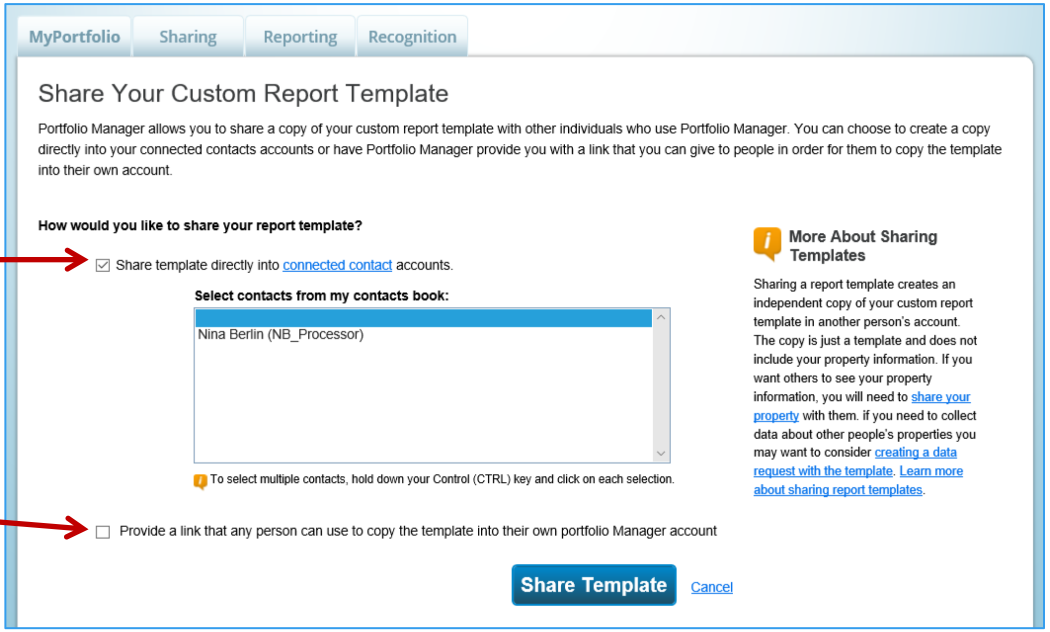
Share Template



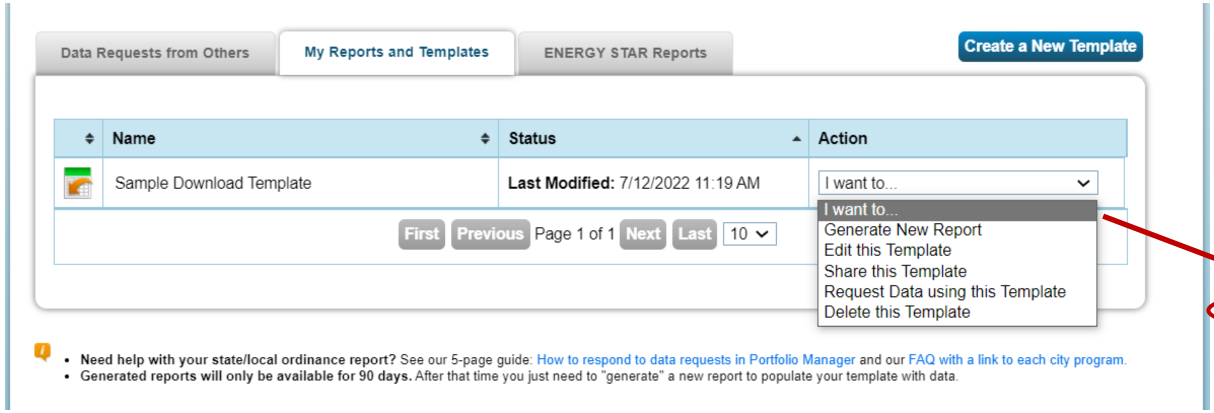


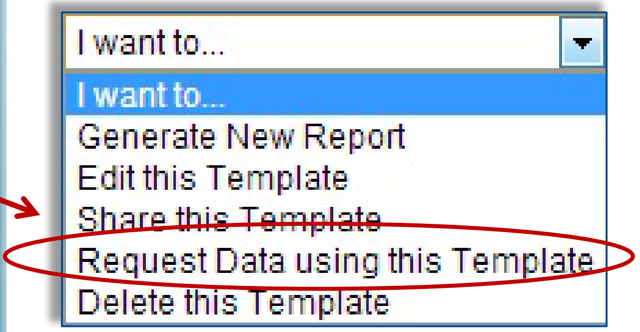
Share with a Contact; or

Generate a link in Portfolio Manager that allows any user to copy the template to their account



Request Data Using Template

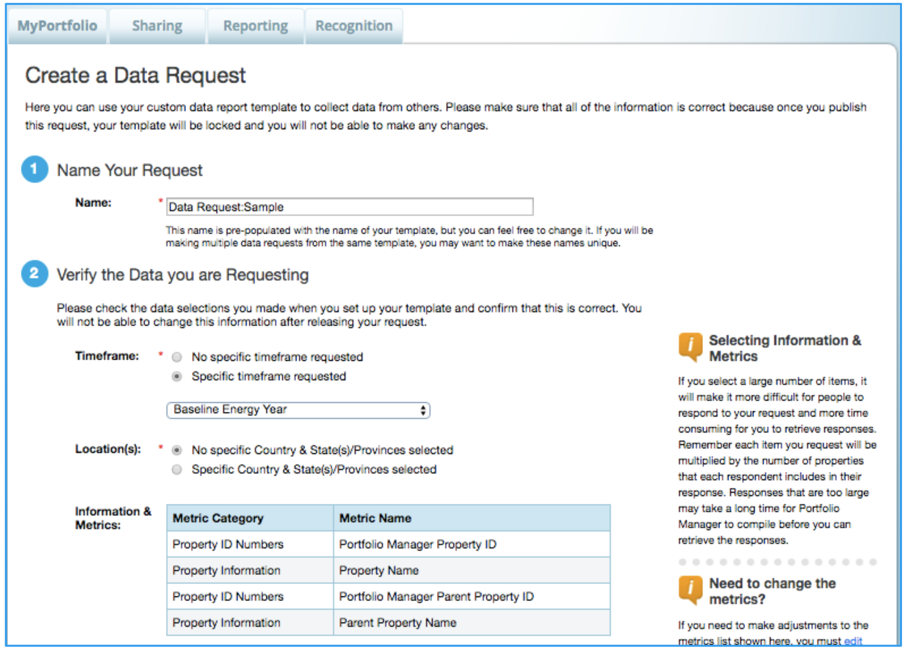




Name Your Request

Verify Data

- Timeframe
- Locations
- Info and Metrics



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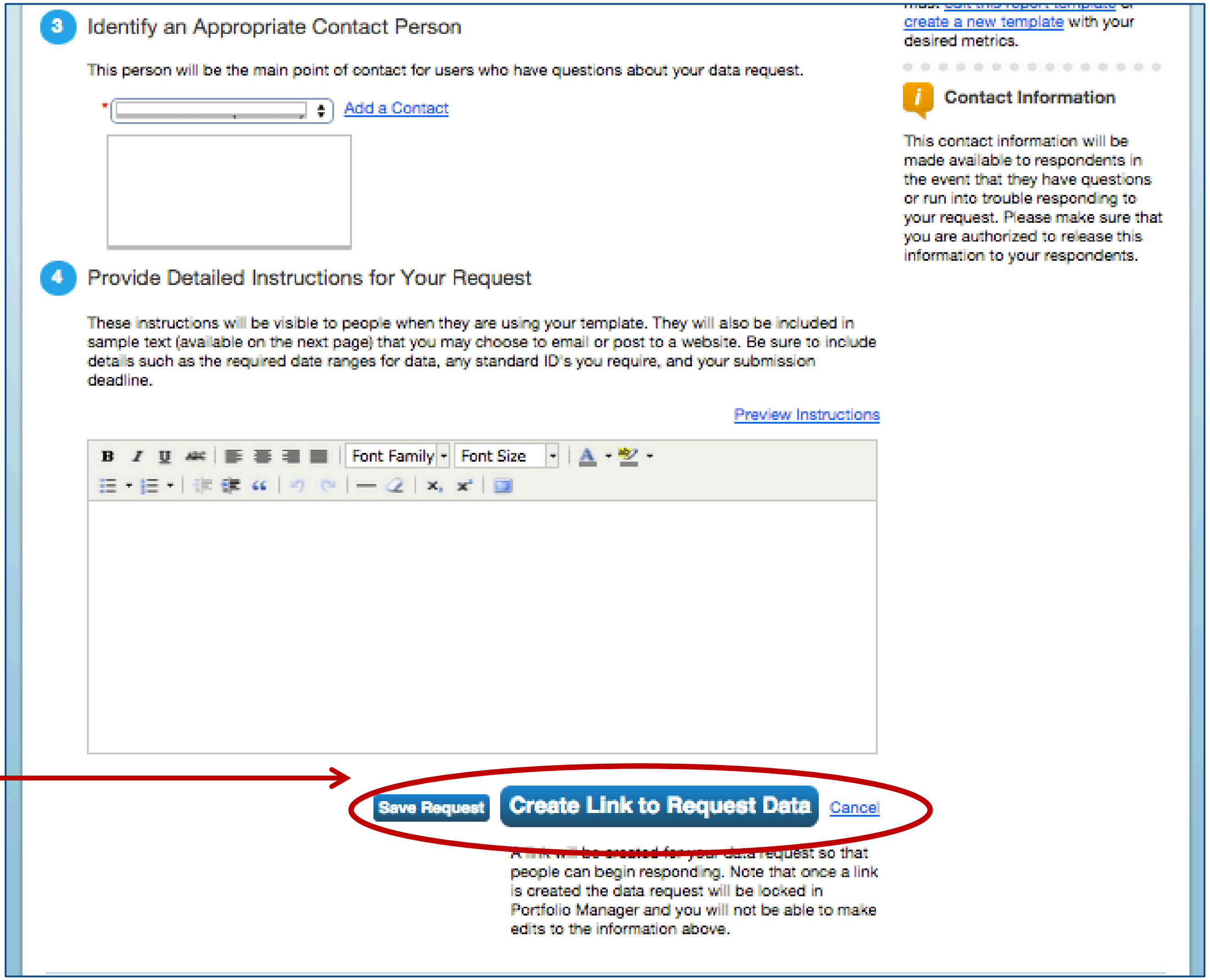
Request Data Using Template

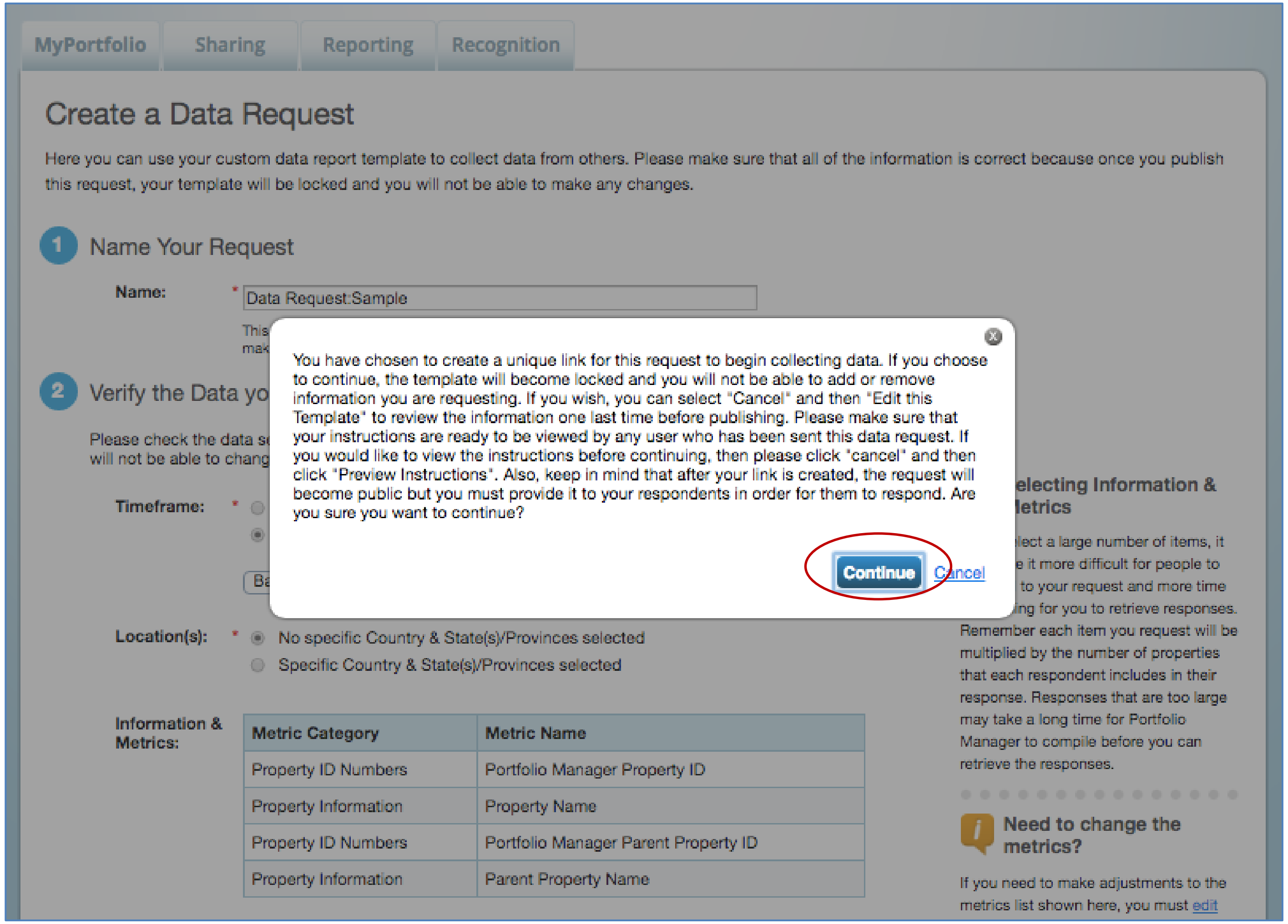
Identify Contact

Provide instructions

“Save” or “Create Link” to request data



Publish Data Request



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Data Request Created

Specific Instructions for your Respondents

MyPortfolio | Sharing | Reporting | Recognition

Your data request "Data Request:Sample" has been successfully released.

People can now start responding to your data request. Sample text has been provided below (along with your URL) to help you publicize this data request and start gathering responses.

Instructions for Your Respondents

To distribute your data request and collect benchmarking results from other Portfolio Manager users, share the following URL with your respondents. You can do this in any way you like (e.g., email, letter, flyer, posted to a website). Individuals who respond to your data request will be required to follow a few steps before they can use your template to respond to your request. The following text is provided to you so that you can customize it and pass it along to your respondents when sharing the URL.

Owen Gray of The Clark Group, LLC has requested a report of your properties' energy use data. Please respond to this request using EPA's ENERGY STAR Portfolio Manager tool (Learn more about Portfolio Manager). A report template named "Data Request:Sample" has been created for this purpose and is available at the following link.

https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/8575c81d-35d7-4296-94f0-a6e68e60f30c

New to Portfolio Manager?
After you create a Portfolio Manager account, review the Quick Start Guide to learn how to enter your property's energy data. Once you've entered your property information, open the "Data Request:Sample" report template to create and submit your report.

How to Access "Data Request:Sample" report template after you created an account

- To access the data request for the first time, click the link "Data Request:Sample" and then log in to Portfolio Manager as prompted. You will be directed to the Respond to Data Request page.
- Once you have initially accessed the data request by clicking on the external link above, the data request will always appear within your Portfolio Manager account in the Reporting tab and can be accessed at any time in the future by following these steps:
  - Log into your Portfolio Manager account at: www.energystar.gov/buildings
  - Go to the Reporting tab
  - Under Templates and Reports, find "Data Request:Sample"
  - From the Action Menu, select "Respond to Data Request"

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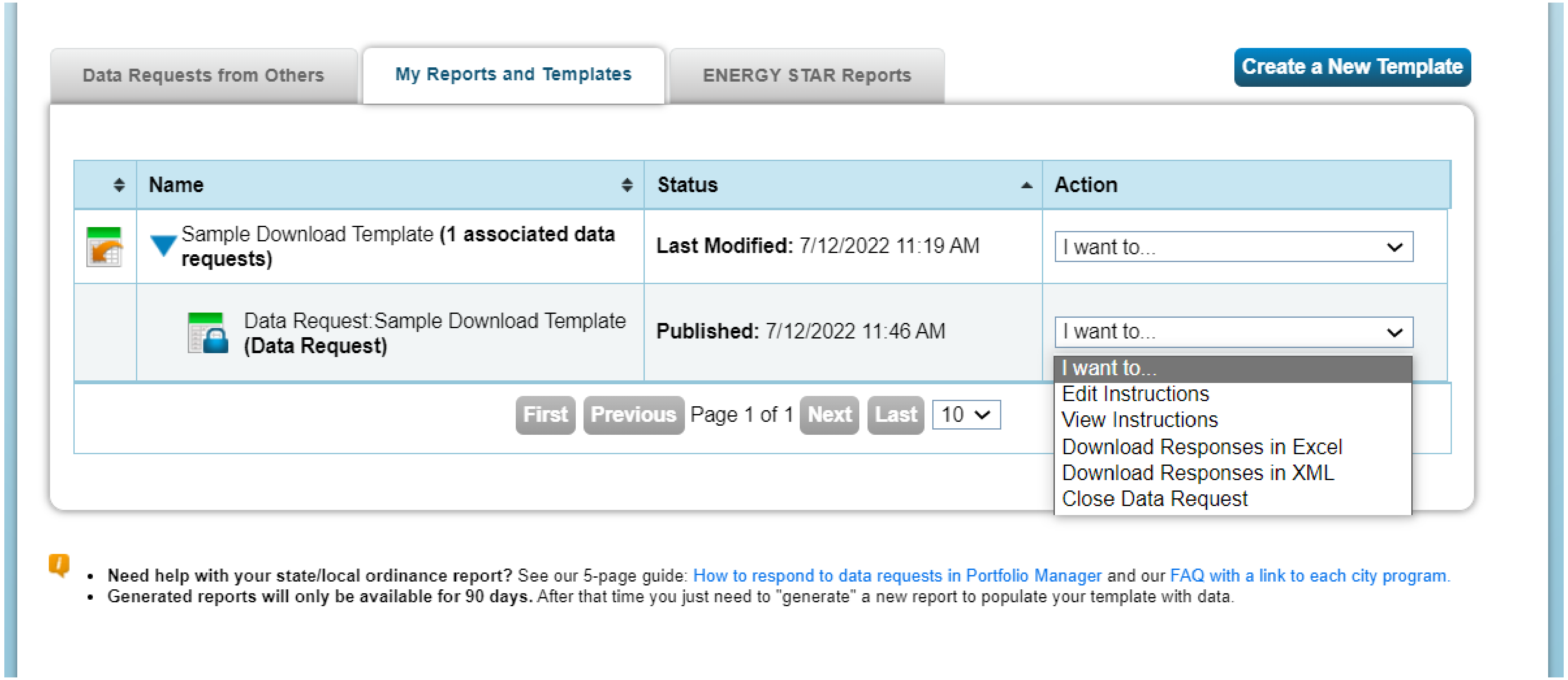
Managing Your Data Request



Responding to Data Requests

- For more information on responding to data requests, please reference www.energystar.gov/buildings/training for:

- Print resource titled: "How to Respond to Data Requests in Portfolio Manager"

- 5 minute video titled: "How to Respond to a Data Request in Portfolio Manager"

ENERGY STAR® Portfolio Manager®

"How To" Series

How to Respond to Data Requests in Portfolio Manager®

EPA's ENERGY STAR Portfolio Manager tool helps you measure and track the energy use, water use, and greenhouse gas emissions of your properties, all in a secure online environment. You can use the results to identify under-performing buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance.

Portfolio Manager provides the ability for organizations wishing to collect data from a variety of individuals to develop and use a custom Data Request within Portfolio Manager. You may receive Data Requests from other users or organizations to provide property or portfolio data as part of a program or initiative. Each request includes a link that takes you to Portfolio Manager and provides instructions for completing the Data Request.

This process is often used in jurisdictions where there are voluntary benchmarking programs or mandatory energy use disclosure policies.

Process for Responding to Data Requests

1. Access the request.
2. Prepare a response.
3. Preview the response.
4. Submit the response.

Responding to a Data Request is different than sharing a property with a contact, because when you respond to a Data Request, you release only the information specified in the data request template for the designated time period.

Follow the steps in this document to respond to a Data Request.

1 Access the Request

When another Portfolio Manager user sets up a data request, they will provide a link to access the request. The link may be provided via email or posted on a public website.

Click the link and then log in to Portfolio Manager as prompted. You will be directed to the **Respond to Data Request** page.

Pop Quiz!

3. True or False: You can only generate reports in Portfolio Manager using the pre-defined templates.
   a. True
   b. False

4. If you need access to specific data points from properties outside your organization, which of the following is the best approach to obtain this information?
   a. Have other Portfolio Managers share their property records with you
   b. Initiate a Portfolio Manager Data Request
   c. Have other Portfolio Managers transfer their property records to you

Pop Quiz!

3. True or False: You can only generate reports in Portfolio Manager using the pre-defined templates.
   a. True
   b. False

You can create custom reporting templates on the "Reporting" tab.

4. If you need access to specific data points from properties outside your organization, which of the following is the best approach to obtain this information?
   a. Have other Portfolio Managers share their property records with you
   b. Initiate a Portfolio Manager Data Request
   c. Have other Portfolio Managers transfer their property records to you

Sharing and transferring property records will give you, at a minimum, read-access to the entire property. If you only need specific data points or metrics for your reporting, it is best to initiate a Data Request.

How To

- Update data using spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reporting templates
- Use the Sustainable Buildings Checklist

What is the Sustainable Buildings Checklist?

- United States Federal High Performance Sustainable Buildings Checklist (Guiding Principles Checklist) now available to all property types
- Assist owners/managers with evaluating sustainability in existing buildings
- Encouraged for all properties; used by U.S. Federal buildings to comply with requirements

Use the Sustainable Buildings Checklist to:

- *Conduct initial and final building walkthrough assessments*
- *Track and easily view progress on each guiding principle*
- *Upload compliance documents to the repository for record keeping*
- *Create a portfolio-wide sustainability roll-up report*
- *Review up-to-date energy and water metrics generated by Portfolio Manager*

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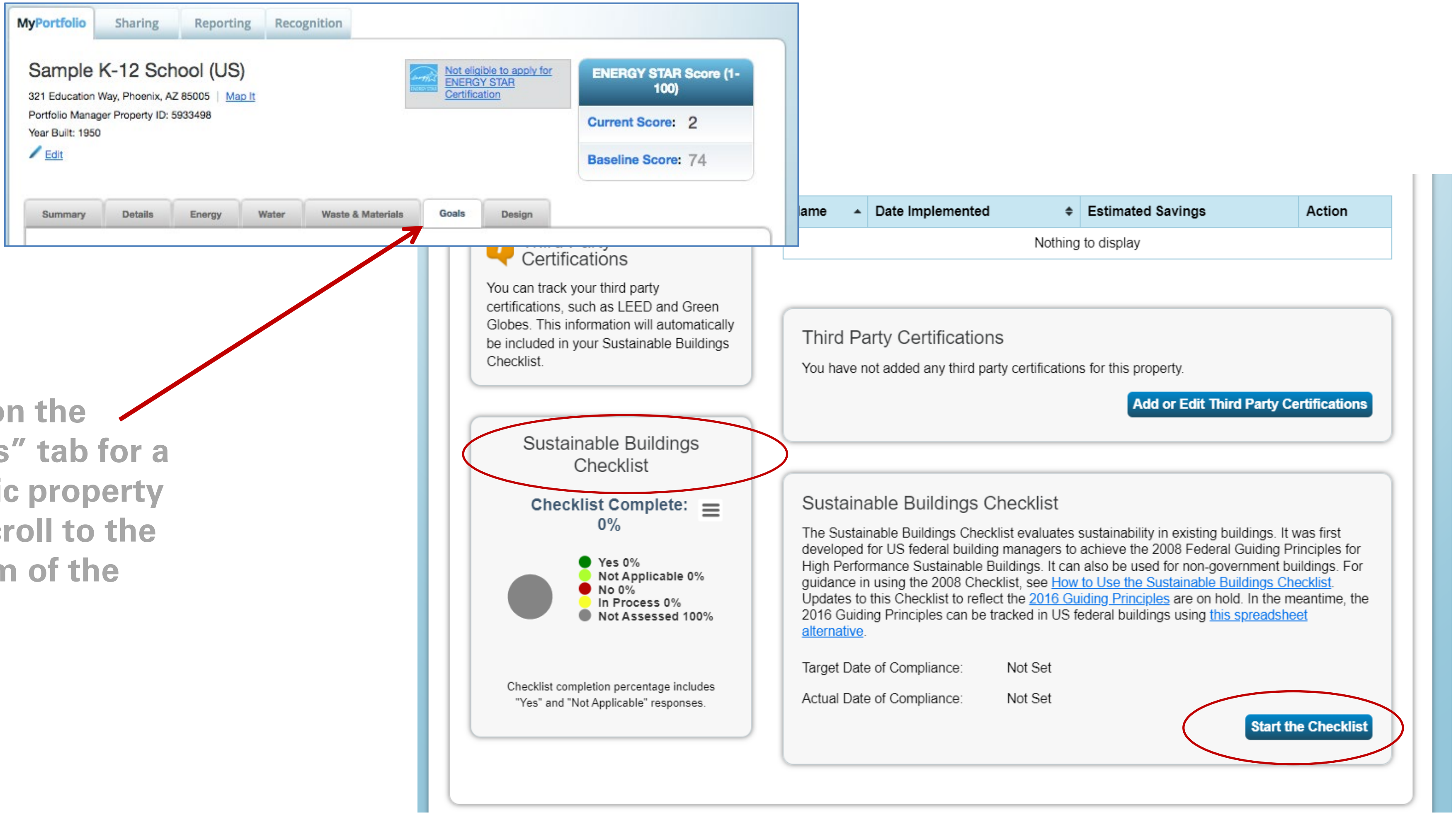
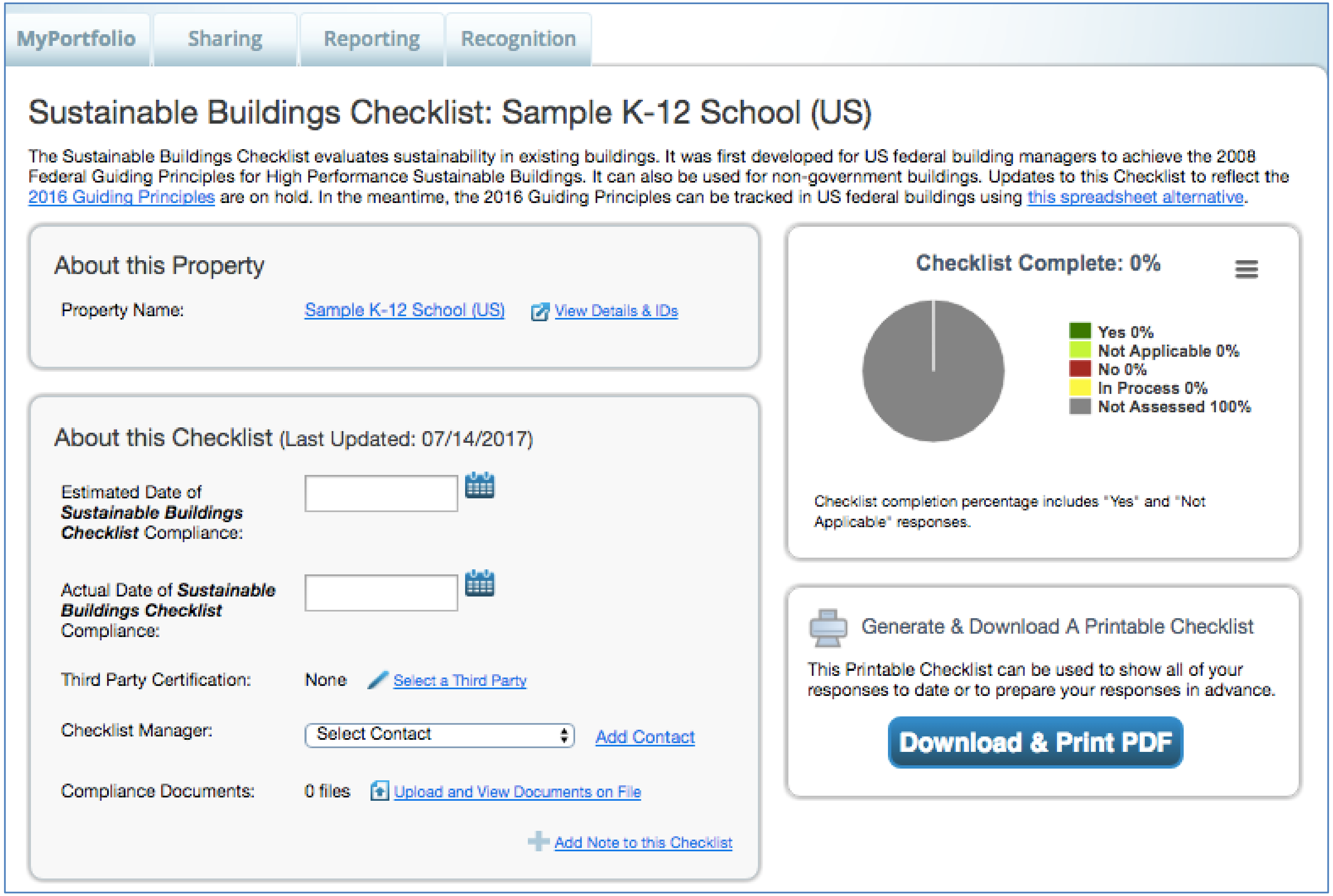
Access the Sustainable Buildings Checklist

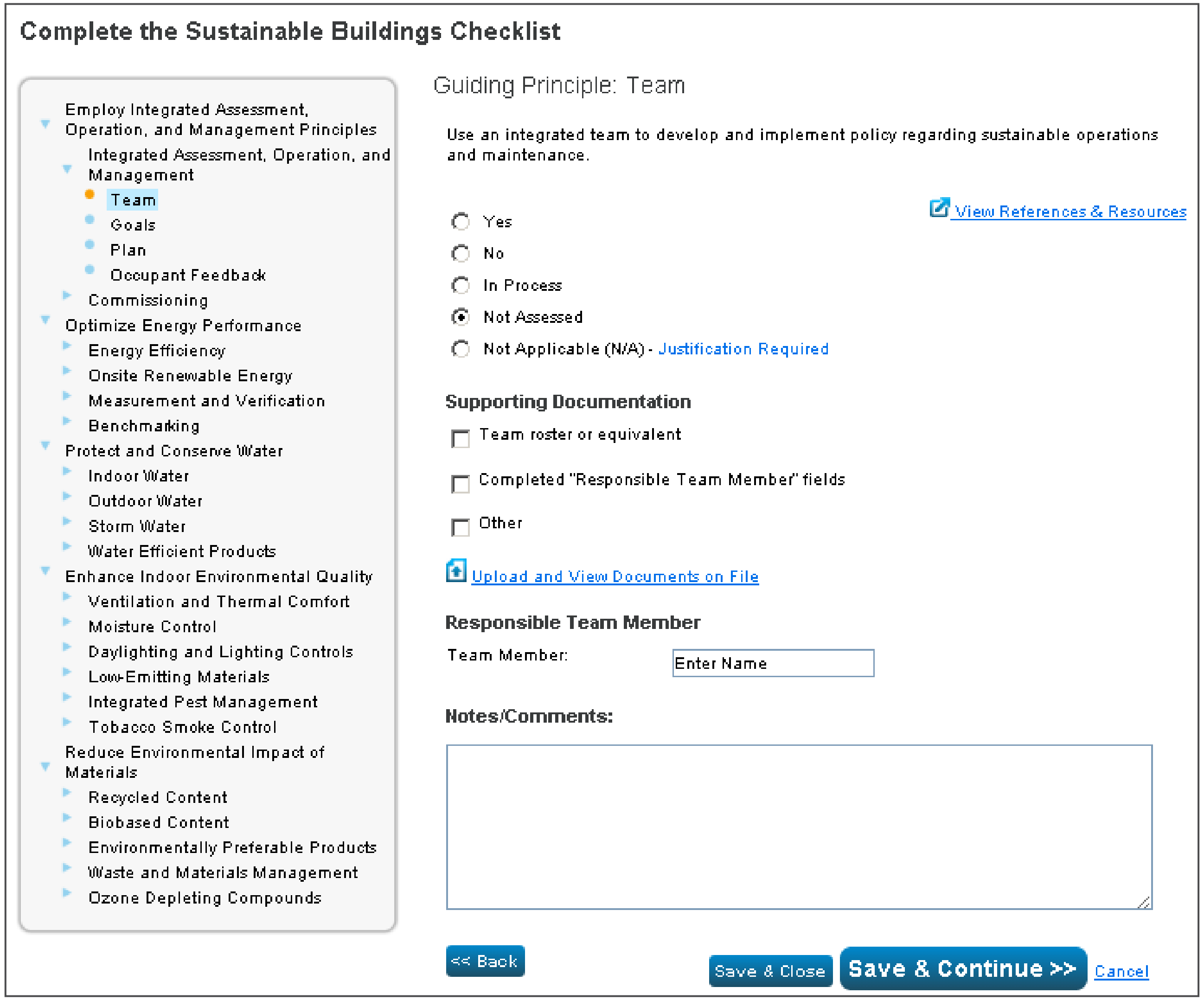


Click on the "Goals" tab for a specific property and scroll to the bottom of the page

Start the Sustainable Buildings Checklist



Complete Checklist Step by Step



Pop Quiz!

5. True or False: Using the Sustainable Buildings Checklist in Portfolio Manager is not required in order to obtain ENERGY STAR Certification for a property.
   a. True
   b. False

Pop Quiz!

5. True or False: Using the Sustainable Buildings Checklist in Portfolio Manager is not required in order to obtain ENERGY STAR Certification for a property.
   a. True
   b. False

You **do not** need to use the Sustainable Buildings Checklist to obtain ENERGY STAR Certification. However, it can be a valuable tool to evaluate your building's sustainability.

Recap

In this training, we learned how to:

- Update data using the spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reporting templates
- Use the Sustainable Buildings Checklist

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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