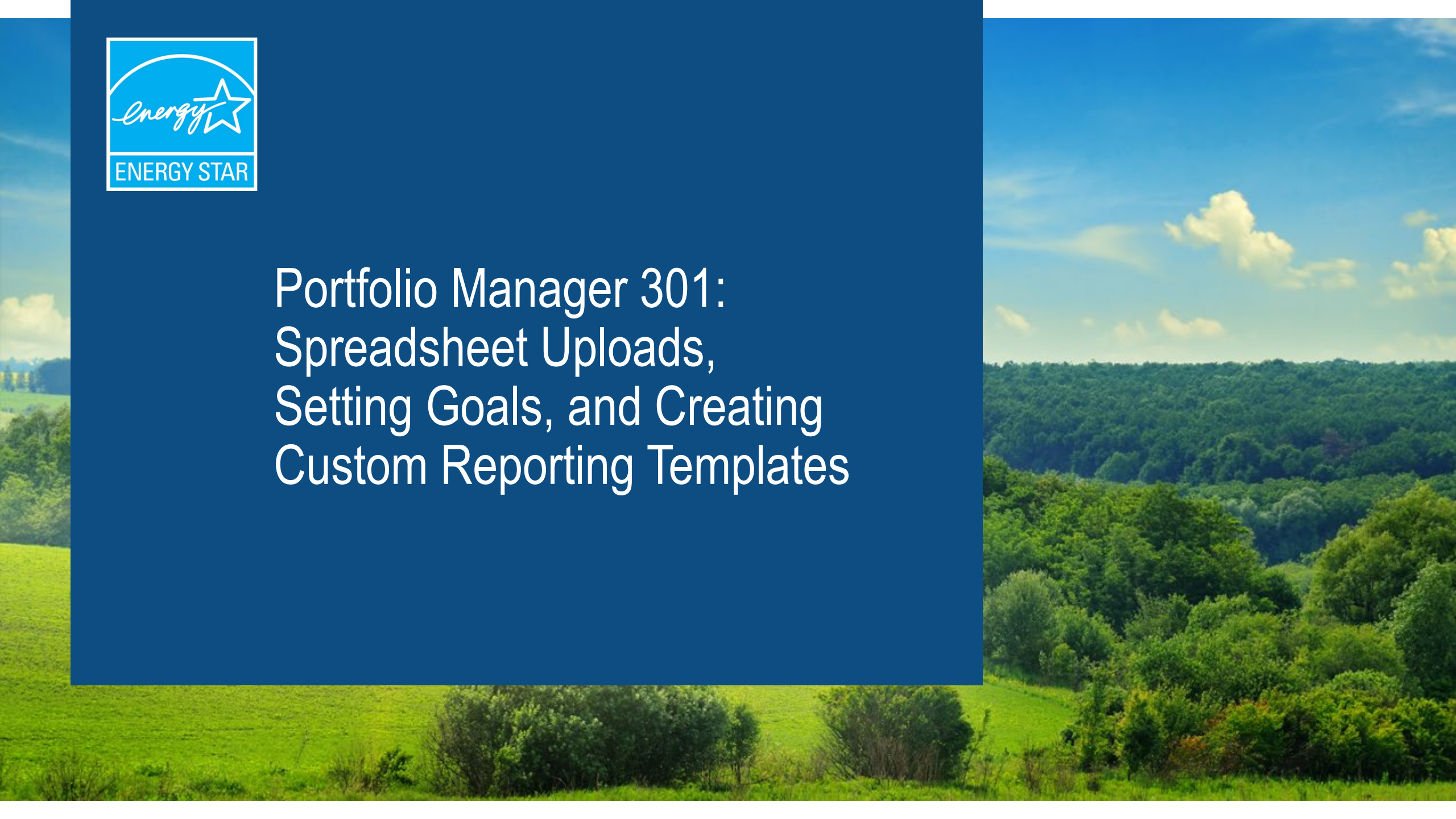




Portfolio Manager 301: Spreadsheet Uploads, Setting Goals, and Creating Custom Reporting Templates



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®

PortfolioManager®

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

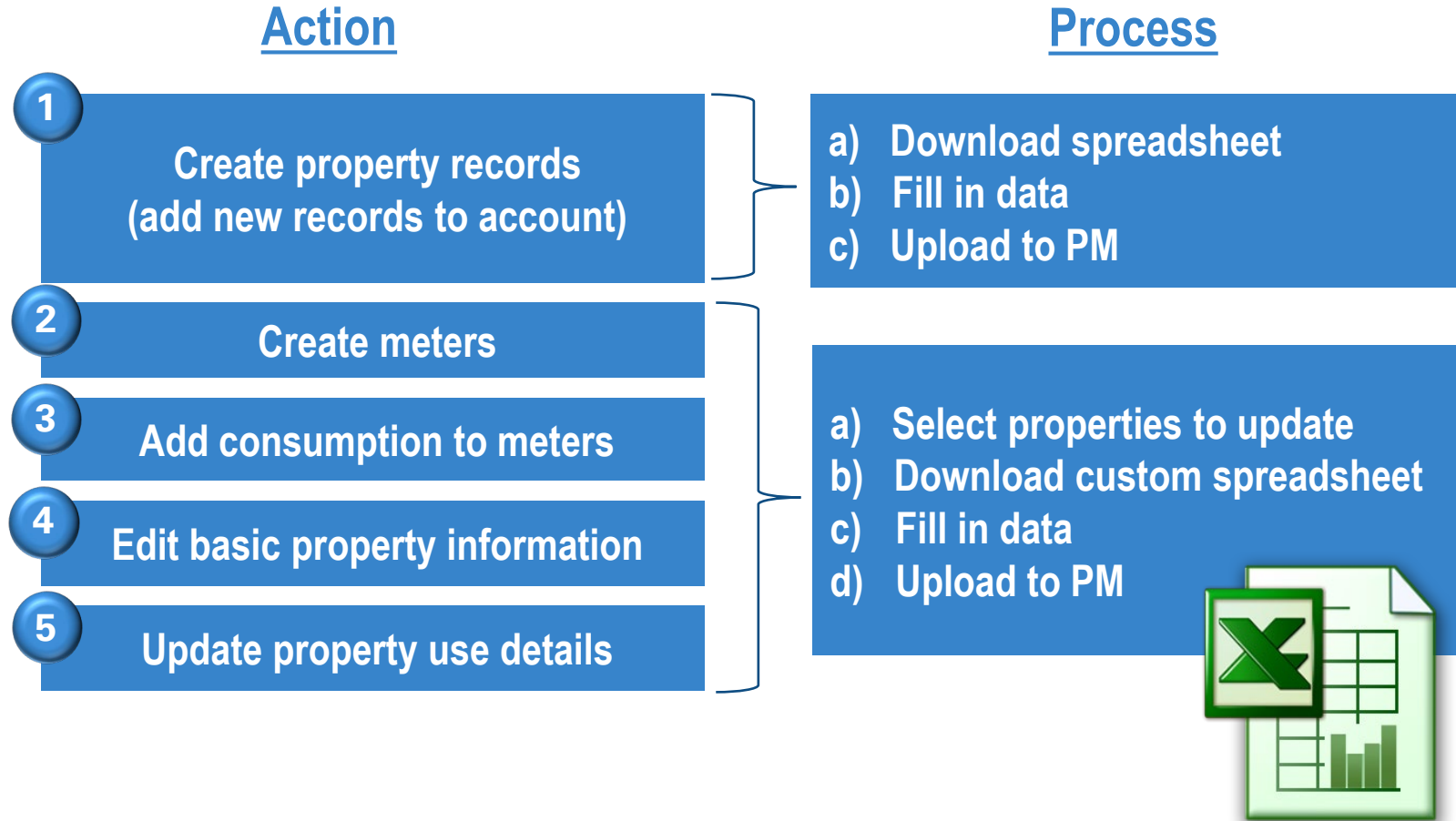
Best option if you use groups
or other filters in Portfolio
Manager



ENTER THE
DATA
MANUALLY

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

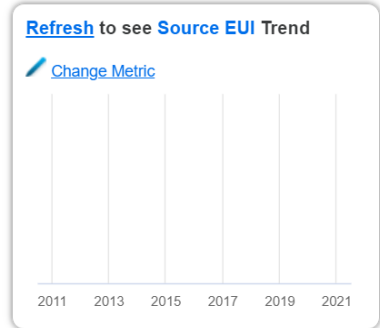
Update data using the spreadsheet upload feature



Update data using the spreadsheet upload feature

Scroll to Manage Portfolio menu

Properties (3)
[Add a Property](#)



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.
- [Delete](#) properties from your account.

Dashboard

Please [refresh](#) to see your current metrics.

View All Properties (3) | Energy Highlights | [Refresh Metrics](#)

[Add/Edit/Delete Groups](#) | [Add/Edit/Delete Views](#)

Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft ²)	Source EUI (kBtu/ft ²)
Cafe 19834235				
Meter Issue Office Example 18950649				
Portfolio Manager 201 Sample Building 18939816				

First Previous Page 1 of 1 Next Last 100

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.
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- [Delete](#) properties from your account.

Spreadsheet Upload Overview

[MyPortfolio](#) [Sharing](#) [Reporting](#) [Recognition](#)

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [entering each property manually](#) or adding bills manually. [Learn more below.](#)

What do you want to upload?

- **Add new properties to my account** - To get started, fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in this custom template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template: [Browse...](#) [Upload](#)

Select "Browse" to locate the file on your computer and then select "Upload."

⚠ This is a powerful feature. Be careful!

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW DEVELOPER New Tab Zayko, Erin K (US)

K19

	A	B	C	D	E	F	G	H	I	J
	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)
1										
2	Main Warehouse	714 W. Camargo		San Antonio	TX		78205	United States	1975	Non-Refrigerated V
3	Office Tower	716 W. Huisache		San Antonio	TX		78212	United States	1994	Office
4	Sunshine School	800 Flores St.		San Antonio	TX		78212	Unites	1980	Adult Education
5										
6										
7										
28										
29										
30										
31										
32										
33										
34										
35										
36										
37										
38										
39										

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

- 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.



Add New Properties: Upload Completed Spreadsheet

MyPortfolio | Sharing | Reporting | Recognition

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [entering each property manually](#) or adding bills manually. Learn more below.

What do you want to upload?

- **Add new properties to my account** - To get started, fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in this custom template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload: Please select type
Add New Properties
Add Bills to Existing Meters
Add Meters to Existing Properties
Update Use Details for Existing Properties
Edit Basic Information for Existing Properties

Upload Template:

This is a powerful feature. Be careful!

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

Upload filled out templates:

Select Template

Upload

Add Meters/Add Bill Data/Edit Basic Property Info

MyPortfolio | **Sharing** | **Reporting** | **Recognition**

Upload and/or Update Multiple Properties


If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [entering each property manually](#) or adding bills manually. Learn more below.

What do you want to upload?

- **Add new properties to my account** - To get started, fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in this custom template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

 [Add Properties Template](#)


Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template: No file chosen

Select "Browse" to locate the file on your computer and then select "Upload."

 **This is a powerful feature. Be careful!**

- ◊ Multiple submissions could result in duplicate data being added to your portfolio, property or meter.
- ◊ Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- ◊ Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

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: *

3 Select Detailed Information to Include

Energy Meter Types:

Electric

purchased from the grid

How many bills for this type of meter (per property)?

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

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.

Create & Download Template [Cancel](#)

Excel window: Add_Bills_to_Meters.xlsx - Excel

Formulas bar: fx

	B	C	D	E	F	G	H	I	J
	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)

Navigation tabs: 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.



MyPortfolio Sharing Reporting Recognition

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [entering each property manually](#) or adding bills manually. Learn more below.

My Spreadsheet Uploads

The following spreadsheets have been uploaded to Portfolio Manager. Depending on the size of your spreadsheet, completing the upload to your portfolio may take a while.

File Name	Type of Upload	Date	Status
Add_Properties_warehouse e.xlsx	New Property	10/29/2015 11:08 A M	Success
Add_Properties_warehouse e.xlsx	New Property	10/29/2015 11:06 A M	Failed View Errors

[Delete Selected Entries](#)

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template: Add_Bills_to_Meters.xlsx

Select "Browse" to locate the file on your computer and then select "Upload."

⚠ This is a powerful feature. Be careful!


- Multiple submissions could result in duplicate data being added to your portfolio, property or meter.

Edit and Manage Information

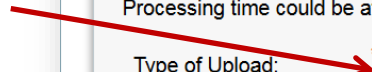

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

Status of upload appears here



Select the upload type then "Upload"

Add Bills to Existing Meters: Upload Spreadsheet

MyPortfolio | Sharing | Reporting | Recognition

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [entering each property manually](#) or adding bills manually. Learn more below.

What do you want to upload?

- **Add new properties to my account** - To get started, fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in this custom template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload: Please select type

Upload Template:

- ✓ Please select type
- Add New Properties
- Add Bills to Existing Meters
- Add Meters to Existing Properties
- Update Use Details for Existing Properties
- Edit Basic Information for Existing Properties

This is a powerful feature. Be careful!

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter.
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- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

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.

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.

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: Let Portfolio Manager automatically set my baselines Leave property-specific baselines as currently set

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

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

Energy Target

Target Metric: Leave property-specific targets as set

Target Value:

[Cancel](#)

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.

.....

Be Careful

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

Property Goals Tab: View Specific Property Goals & Improvements

Goals tab at the Property level

Company HQ
 1200 New York Avenue NW, Washington, DC 20005 | [Map It](#)
 Portfolio Manager Property ID: 6466285
 Year Built: 1996 | [Edit](#)

ENERGY STAR Score (1-100)
Current Score: 63
Baseline Score: 63

Summary | Details | Energy | Water | Waste & Materials | **Goals** | Design

Energy Performance (kBtu/ft²)

Energy Use Intensity

Metric	Jan 31 2017 (Energy Baseline)	Apr 30 2018 (Energy Current)	Target*	Median Property*
ENERGY STAR score(1-100)	63	63	75	50

Baselines & Targets

	Baselines	Target
Energy	01/31/2017	75
Water	12/31/2008	Not Available
Waste/Materials	Not Available	Not Available

[Set Baselines or Target](#)

Add/Edit Baselines or Targets

Choose baselines or let Portfolio Manager select automatically

Target Options

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

MyPortfolio | Sharing | Reporting | Recognition

Set Performance Baseline & Target

To establish a performance target, you must first set a baseline for comparison. Then, you can establish a performance target by either defining a target rating or a target reduction (%). The energy use and costs displayed reflect required levels to meet either the target rating or percent reduction goal for this property.

Targets are not available at this time for water or waste/materials, however setting a baseline can still provide you with a starting point on which to evaluate your property's progress.

Baselines

Energy Baseline: Select a baseline: 01/31/2017 Let Portfolio Manager automatically set my baselines

Water Baseline: Select a baseline: 12/31/2008 Let Portfolio Manager automatically set my baselines

Waste Baseline: You must have at least one waste/material meter to select a waste baseline. After you [add a meter](#), don't forget to [include your meter in your metrics](#) as well.

Energy Target

Energy Target Metric:

Energy Target Value: 1-100 value

[Save & Calculate Other Metrics](#)

Select "Calculate Other Metrics" to refresh the table after making changes to "Target Metric" and "Target Value"

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**). Portfolio Manager can automatically determine your baseline by calculating the earliest eligible year ending date.

About Design Targets

On this page you can set a target for your property to track its progress after it has become operational. If your property is still in the design stage, you can use the design features to [set design targets](#).

If you are seeing "Not Available"...

The Current and Baseline metrics (in the chart to the left) require 12 full months of energy consumption and property use information. The Target metrics may also

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

MyPortfolio | Sharing | Reporting | Recognition

Properties (15) [Add a Property](#)

Source EUI Trend (kBtu/ft²) [Change Metric](#)

(Chart current as of 05/08/2019 04:29 PM EDT) [Refresh Chart](#)

Manage Portfolio

- [Transfer ownership](#) of a property that you manage to another Portfolio Manager user.
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- [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.

Portfolio Manager Metric Updates

On August 27, 2018 performance metrics in Portfolio Manager were updated for U.S. buildings to reflect current market data. You may notice a change in your current and historic 1-100 ENERGY STAR score or other metrics. After logging in for the first time after these updates have been made, you'll need to click the "Refresh Metrics" button to see your new metrics within the Dashboard. For more information, visit www.energystar.gov/scoreupdates. [Clear Message](#)

Dashboard (Metrics current as of 03/11/2019 12:05 PM EDT) [Search by ID or Name](#)

View All Properties (15) | Energy Highlights | [Refresh Metrics](#)

[Add/Edit/Delete Groups](#) | [Add/Edit/Delete Views](#)

Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft ²)	Source EUI (kBtu/ft ²)
Antonio Office				
Building 6653008	NA	NA	NA	NA
Ortega Office Building 6652264	NA	NA	NA	NA
Ortega Office Building 6732714				
Ortega Office				

You have asked for Portfolio Manager to collect all of the information in your portfolio into an Excel download. This includes all of your basic property information as well as all historical use information, meters and bills for each property. This could take a while if you have a lot of properties. Are you sure you would like to continue?

[Continue](#) [Cancel](#)



Download Property to Excel

Summary Details Energy Water Waste & Materials Goals Design

Source EUI Trend (kBtu/ft²)
[Change Metric](#)

(Chart current as of 05/14/2019 05:05 PM EDT) [Refresh Chart](#)

[Change Metrics](#)
[Change Time Periods](#)

Metrics Summary

Metric	Dec 2015 (Energy Baseline)	Dec 2017 (Energy Current)	Change
ENERGY STAR Score (1-100)	24	26	2.00 (8.30%)
Source EUI (kBtu/ft ²)	258.1	250.5	-7.60 (-2.90%)
Site EUI (kBtu/ft ²)	112.6	103.1	-9.50 (-8.40%)
Energy Cost (\$)	561,340.17	568,086.24	6746.07 (1.20%)
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	10.3	9.9	-0.40 (-3.90%)
Water Use (All Water Sources) (kgal)	3,450.7	3,079.5	-371.20 (-10.80%)
Total Waste (Disposed and Diverted) (Tons)	818.59	Not Available	N/A

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.

[Check for Possible Errors](#)

Sharing this Property

[Share](#)

More About Sharing

You haven't [shared your property](#) yet. Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)

[Copy Property](#) [Transfer Ownership](#) [Download Property to Excel](#)



Energy Meter Tab

Summary
Details
Energy
Water
Waste & Materials
Goals
Design

Meter Summary

3 Energy Meters Total

3 - Used to Compute Metrics

[Add A Meter](#)

Current Energy Date
Mar 31, 2017

[Enter Your Bills](#)

Four Ways to Enter Bill Data

- Manually
- Use our [simple spreadsheet](#) (one meter) to upload or Copy/Paste
- Use our [complex spreadsheet](#) (multiple meters + multiple properties)
- [Find an organization](#) to electronically enter your data into Portfolio Manager

Your Property is: [Edit](#)

- A Single Building
- Part of a Building
- A Campus of Multiple Buildings

You Are Tracking: [Edit](#)

- Total energy consumption for your

Energy Use by Calendar Month

● Electric - Grid
■ Electric - Solar
■ Natural Gas

[Export Data by Calendar Month](#)

Meters - Used to Compute Metrics (3)

[Change Meter Selections](#)






[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter 30337007	Electric - Grid	04/16/2017	Yes
Electric Solar Meter 30337005	Electric - Solar	04/16/2017	Yes
Natural Gas 30337004	Natural Gas	04/16/2017	Yes

[Download Annual Totals by Meter](#)

Manage Portfolio

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.

MyPortfolio Sharing Reporting Recognition

Create a Custom Download

Whether you have entered one year or ten year's worth of data, you can export your raw data to Excel [example download](#) to get a feel for what is included.

Use the form below to choose exactly what data you need to download.

- 1** Select Properties to Include
Properties:
- 2** What type of data do you want to include?
 - Basic Property Information
Download basic property information such as name and address
 - Property IDs
Download property ID's (e.g. Custom ID's, Standard ID's)
 - Uses
Download which **uses** are at each property (e.g. Office)
 - Use Details
Download the values entered for your **use details** (e.g. Weekly Operating Hours)
 - Meters
Download basic information such as name, units and dates when the meter was in use.
 - Meter Entries
Download individual meter entries you have entered.

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

MyPortfolio | Sharing | **Reporting** | Recognition

Charts & Graphs

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Scorecard](#)
- [Water Scorecard](#)

Site EUI

What is the site energy of my properties, as reported on my utility bills?

Data Requests from Others | My Reports and Templates | ENERGY STAR Reports | **Create a New Template**

Name	Status	Action
Sample Download Template	Last Modified: 7/12/2022 11:19 AM	I want to... <input type="button" value="v"/>

First Previous Page 1 of 1 Next Last 10 v

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.

View and Download Performance Documents

Generate Custom Report Templates

ENERGY STAR Performance Documents

ENERGY STAR Performance Documents

-  [Statement of Energy Performance \(SEP\)](#)
-  [Statement of Energy Design Intent \(SEDI\)](#)
-  [Data Verification Checklist](#)
-  [Progress & Goals Report](#)
-  [ENERGY STAR Scorecard](#)
-  [Water Scorecard](#)



MyPortfolio | Sharing | Reporting | Recognition

Generate and Download Reports

Portfolio Manager offers several standard reports for properties that can be useful in communicating your property's progress with others. These reports offer detailed information about your property for a single time period and are presented in a PDF format. [You can view sample reports here.](#)

- Select Report(s) to Download**
 - Statement of Energy Performance (SEP)
 - ENERGY STAR Data Verification Checklist
 - ENERGY STAR Scorecard
 - Progress and Goals Report
 - Statement of Energy Design Intent (SEDI)
 - Water Scorecard
- Select Property for Report(s)**

Property:
- Select Timeframe for Report(s)**

Timeframe: for:

Generate & Download Report(s) [Cancel](#)

Prefer to design your own report?

If none of these reports look like what you need, consider creating a [spreadsheet template](#) to pull the data you want and design your own report outside of Portfolio Manager.

Are you applying for recognition?

Although these reports look similar, if you are applying for either [ENERGY STAR certification](#) or [Designed to Earn](#) recognition, you must generate the required documentation by way of the application process.

Metrics on your Reports

In order to calculate metrics for your property for a given time period, there must be 12 months of complete meter data and property use detail information. If metrics (including the score) cannot be calculated for any reason, they will appear as "N/A" in your report.

Charts & Graphs

MyPortfolio Sharing **Reporting** Recognition

Charts & Graphs

Weather Normalized Source EUI

How much total primary fuel would be required by my properties, under average weather conditions?

“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 9:52 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...

Important Information Called Out in Bold

- 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)

New Key Explains Report Icons

Custom Reports

Data Requests from Others | **My Reports and Templates** | ENERGY STAR Reports | [Create a New Template](#)










Name	Status	Action
 Sample Download Template	Last Modified: 7/12/2022 11:19 AM	I want to... <input type="button" value="v"/>

First Previous Page 1 of 1 Next Last 10 v

Important Information Called Out in Bold

- 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)

New Key Explains Report Icons

Custom Reporting

MyPortfolio | Sharing | **Reporting** | Recognition

Charts & Graphs




Energy Cost Intensity
How much do I spend on energy for my properties, on a per square foot basis?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Scorecard](#)
- [Water Scorecard](#)

Data Requests from Others | **My Reports and Templates** | ENERGY STAR Reports | [Create a New Template](#)

Name	Status	Action
 Sample Download Template	Last Modified: 7/12/2022 11:19 AM	I want to... <input type="button" value="v"/>

First Previous Page 1 of 1 Next Last 10 v

i

- 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.

Generate Custom Report Templates

Custom Templates

The screenshot shows the 'Create a Report Template' page in the Energy Star Portfolio Manager. The page is divided into four numbered steps:

- 1 Name Your Template**: A text input field for the template name.
- 2 Select Timeframe of Information to Include**: A dropdown menu currently set to 'Current Year'.
- 3 Select Properties to Include**: A dropdown menu for selecting the number of properties.
- 4 Select Information & Metrics to Include**: A button labeled 'Select Information & Metrics' which opens a modal window.

The modal window, titled 'Select Information & Metrics', displays a list of categories on the left and a list of specific metrics on the right. The 'Property Information' category is selected, and the following metrics are checked:

- Property Name
- Parent Property Name

Other metrics listed but not checked include: Address 1, Address 2, City, County, State/Province, Postal Code, Country, Property GFA - Self-Reported (ft²), Property GFA - Calculated (Buildings and Parking) (ft²), Property GFA - Calculated (Buildings) (ft²), Property GFA - Calculated (Parking) (ft²), Primary Property Type - Self Selected, Primary Property Type - Portfolio Manager-Calculated, National Median Reference Property Type, List of All Property Use Types at Property, Largest Property Use Type, Largest Property Use Type - Gross Floor Area (ft²), 2nd Largest Property Use Type, 2nd Largest Property Use - Gross Floor Area (ft²), and 3rd Largest Property Use Type.

At the bottom of the modal, there is a 'Download Full List of Information & Metrics' link, a 'Selected items: 4 of 50 maximum' indicator, and 'Apply Selection' and 'Cancel' buttons.

Below the modal, the main page shows a 'Save Template' button and a 'Cancel' link. At the bottom of the page, there are social media links and footer text: 'Follow Us' with icons for Twitter, Facebook, YouTube, and LinkedIn; 'Contact Us | Privacy Policy | Browser Requirements | ENERGY STAR Buildings & Plants Website'.

Electric Demand Metrics also available in custom reports

Select Information & Metrics Selected items: 4 of 250 maximum ([View Selection and Order](#))

- Property Information
- Property ID Numbers
- Property Use Details
- Energy Use by Fuel Source
- Data Accuracy
- Energy Performance Metrics**
- Water Performance Metrics
- Waste Performance Metrics

- Energy Baseline Date
- Energy Current Date
- ENERGY STAR Score
- Annual Maximum Demand (kW)
- Annual Maximum Demand (MM/YYYY)
- Annual Maximum Demand (Meter Name (Meter ID))
- National Median Source Energy Use (kBtu)
- National Median Site Energy Use
- National Median Site EUI (kBtu/ft²/yr)
- National Median Source EUI (kBtu/ft²/yr)
- National Median Water/Wastewater Use (gallons/ft²/yr)
- National Median Water/Wastewater Cost (\$/ft²/yr)
- % Difference from National Median

MyPortfolio Sharing **Reporting** Recognition Admin Processing

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 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

MyPortfolio | Sharing | **Reporting** | Recognition

Your template has been successfully saved.


In addition to saving your template for future use, you can go ahead and use it right away to:

- [Generate a Report](#) – Pull information you have selected from your account and into your template to create a report for download.
- [Request Data from Others](#) – Ask other people to fill out your template with information from their accounts.
- [Share Template with Others](#) – Give your template to other people so that they can use it to prepare spreadsheets from their accounts.

Keep in Mind: If you have chosen a large number of properties and/or metrics in your template, it may take a little longer to generate your report. [Learn more about creating large spreadsheets.](#)

New template appears on “My Reports and Template” tab

Data Requests from Others | **My Reports and Templates** | ENERGY STAR Reports | [Create a New Template](#)

Name	Status	Action
 Sample Download Template	Last Modified: 7/12/2022 11:19 AM	I want to... ▾

First Previous Page 1 of 1 Next Last 10 ▾

- 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.

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

Share Template

Data Requests from Others | **My Reports and Templates** | ENERGY STAR Reports | [Create a New Template](#)

Name	Status	Action
Sample Download Template	Last Modified: 7/12/2022 11:19 AM	I want to... I want to... Generate New Report Edit this Template Share this Template Request Data using this Template Delete this Template

First Previous Page 1 of 1 Next Last 10

- 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.

I want to...
 I want to...
 Generate New Report
 Edit this Template
 Share this Template
 Request Data using this Template
 Delete this Template

Share with a Contact; or

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

MyPortfolio | Sharing | Reporting | Recognition

Share Your Custom Report Template

Portfolio Manager allows you to share a copy of your custom report template with other individuals who use Portfolio Manager. You can choose to create a copy directly into your connected contacts accounts or have Portfolio Manager provide you with a link that you can give to people in order for them to copy the template into their own account.

How would you like to share your report template?

Share template directly into [connected contact](#) accounts.

Select contacts from my contacts book:

Nina Berlin (NB_Processor)

Provide a link that any person can use to copy the template into their own portfolio Manager account

[Share Template](#) [Cancel](#)

More About Sharing Templates

Sharing a report template creates an independent copy of your custom report template in another person's account. The copy is just a template and does not include your property information. If you want others to see your property information, you will need to [share your property](#) with them. If you need to collect data about other people's properties you may want to consider [creating a data request with the template](#). [Learn more about sharing report templates.](#)

Request Data Using Template

The screenshot shows the 'My Reports and Templates' section of the Energy Star Portfolio Manager. It features a table with columns for Name, Status, and Action. A dropdown menu is open for the 'Sample Download Template', showing options like 'Generate New Report', 'Edit this Template', and 'Request Data using this Template'. A red circle highlights the 'Request Data using this Template' option, with an arrow pointing to a larger, detailed view of the dropdown menu on the right.

Data Requests from Others | **My Reports and Templates** | ENERGY STAR Reports | **Create a New Template**

Name	Status	Action
Sample Download Template	Last Modified: 7/12/2022 11:19 AM	I want to... Generate New Report Edit this Template Share this Template Request Data using this Template Delete this Template

First Previous Page 1 of 1 Next Last 10

I want to...
I want to...
Generate New Report
Edit this Template
Share this Template
Request Data using this Template
Delete this Template

?

- 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.

Name Your Request

Verify Data

- Timeframe
- Locations
- Info and Metrics

The screenshot shows the 'Create a Data Request' form. It has two main steps: '1 Name Your Request' and '2 Verify the Data you are Requesting'. Step 1 includes a 'Name' field with a pre-populated value 'Data Request:Sample'. Step 2 includes options for 'Timeframe' and 'Location(s)', and a table for 'Information & Metrics'. A red arrow points from the 'Name Your Request' section of the left sidebar to this step. Another red arrow points from the 'Verify Data' section of the left sidebar to the 'Verify the Data you are Requesting' section of the form.

MyPortfolio | Sharing | Reporting | Recognition

Create a Data Request

Here you can use your custom data report template to collect data from others. Please make sure that all of the information is correct because once you publish this request, your template will be locked and you will not be able to make any changes.

1 Name Your Request

Name: * Data Request:Sample

This name is pre-populated with the name of your template, but you can feel free to change it. If you will be making multiple data requests from the same template, you may want to make these names unique.

2 Verify the Data you are Requesting

Please check the data selections you made when you set up your template and confirm that this is correct. You will not be able to change this information after releasing your request.

Timeframe:

- No specific timeframe requested
- Specific timeframe requested

Baseline Energy Year

Location(s):

- No specific Country & State(s)/Provinces selected
- Specific Country & State(s)/Provinces selected

Information & Metrics:

Metric Category	Metric Name
Property ID Numbers	Portfolio Manager Property ID
Property Information	Property Name
Property ID Numbers	Portfolio Manager Parent Property ID
Property Information	Parent Property Name

? **Selecting Information & Metrics**

If you select a large number of items, it will make it more difficult for people to respond to your request and more time consuming for you to retrieve responses. Remember each item you request will be multiplied by the number of properties that each respondent includes in their response. Responses that are too large may take a long time for Portfolio Manager to compile before you can retrieve the responses.

? **Need to change the metrics?**

If you need to make adjustments to the metrics list shown here, you must edit

Publish Data Request

MyPortfolio | Sharing | Reporting | Recognition

Create a Data Request

Here you can use your custom data report template to collect data from others. Please make sure that all of the information is correct because once you publish this request, your template will be locked and you will not be able to make any changes.

- 1 Name Your Request**

Name:
- 2 Verify the Data you are Requesting**

Please check the data sources you are requesting. You will not be able to change the data sources once you publish the request.

Timeframe: 1 Year 3 Years 5 Years

Location(s): No specific Country & State(s)/Provinces selected Specific Country & State(s)/Provinces selected

Information & Metrics:

Metric Category	Metric Name
Property ID Numbers	Portfolio Manager Property ID
Property Information	Property Name
Property ID Numbers	Portfolio Manager Parent Property ID
Property Information	Parent Property Name

You have chosen to create a unique link for this request to begin collecting data. If you choose to continue, the template will become locked and you will not be able to add or remove information you are requesting. If you wish, you can select "Cancel" and then "Edit this Template" to review the information one last time before publishing. Please make sure that your instructions are ready to be viewed by any user who has been sent this data request. If you would like to view the instructions before continuing, then please click "cancel" and then click "Preview Instructions". Also, keep in mind that after your link is created, the request will become public but you must provide it to your respondents in order for them to respond. Are you sure you want to continue?

Continue Cancel

Selecting Information & Metrics

Select a large number of items, it can be more difficult for people to respond to your request and more time may be required for you to retrieve responses.

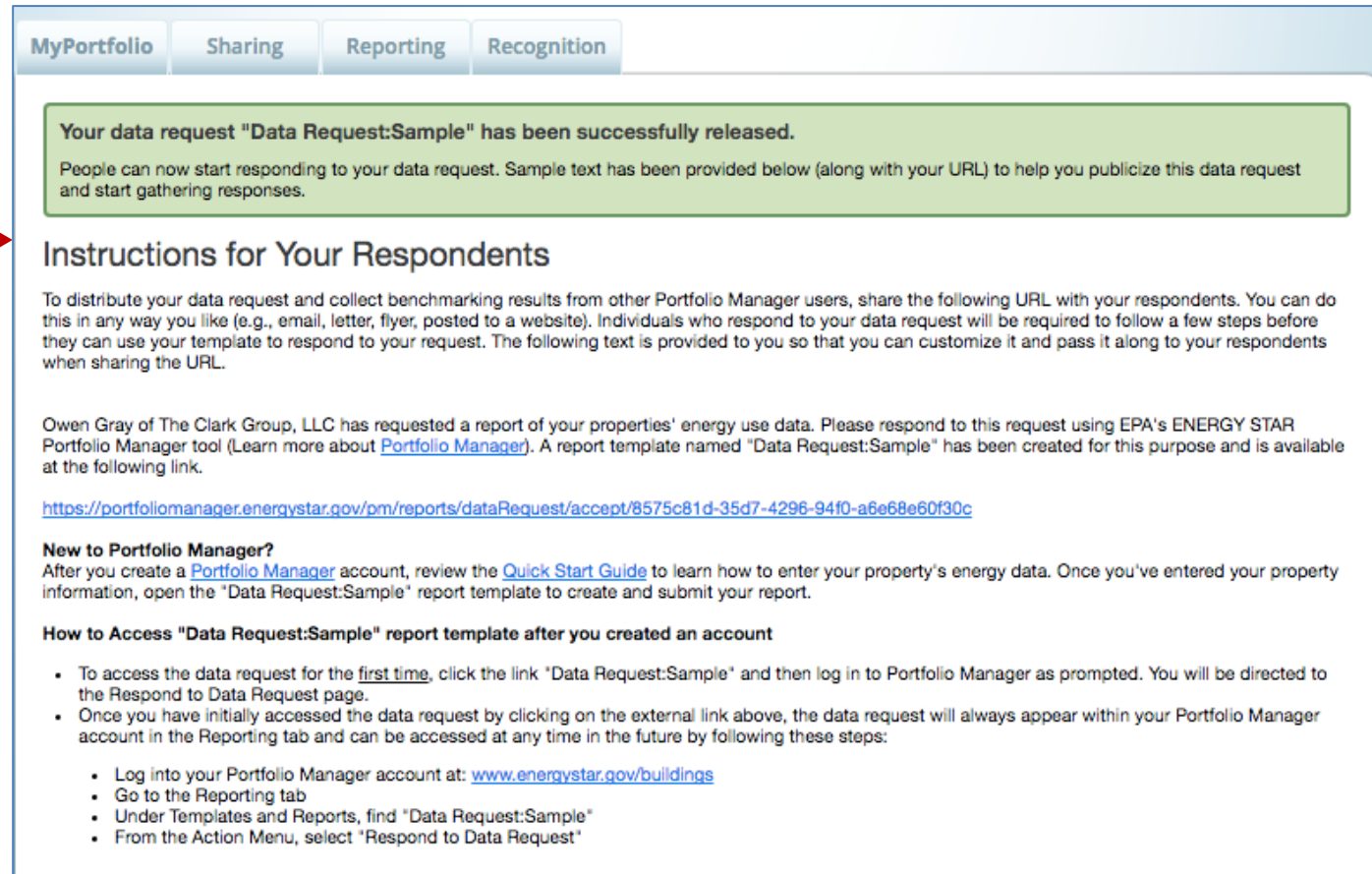
Remember each item you request will be multiplied by the number of properties that each respondent includes in their response. Responses that are too large may take a long time for Portfolio Manager to compile before you can retrieve the responses.

i Need to change the metrics?

If you need to make adjustments to the metrics list shown here, you must [edit](#)

Data Request Created



Specific
Instructions
for your
Respondents



The screenshot shows a web interface with a navigation bar containing tabs for "MyPortfolio", "Sharing", "Reporting", and "Recognition". A green notification box at the top states: "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." Below this is a section titled "Instructions for Your Respondents" which includes a paragraph explaining how to share the request, a specific example from Owen Gray of The Clark Group, LLC, a URL: <https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/8575c81d-35d7-4296-94f0-a6e68e60f30c>, and a "New to Portfolio Manager?" section with a "Quick Start Guide" link. A "How to Access 'Data Request:Sample' report template after you created an account" section follows, containing a bulleted list of steps: 1. 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. 2. 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: 3. Log into your Portfolio Manager account at: www.energystar.gov/buildings 4. Go to the Reporting tab 5. Under Templates and Reports, find "Data Request:Sample" 6. From the Action Menu, select "Respond to Data Request"

Managing Your Data Request

Data Requests from Others **My Reports and Templates** ENERGY STAR Reports [Create a New Template](#)

Name	Status	Action
 Sample Download Template (1 associated data requests)	Last Modified: 7/12/2022 11:19 AM	I want to... ▾
 Data Request: Sample Download Template (Data Request)	Published: 7/12/2022 11:46 AM	I want to... ▾ I want to... Edit Instructions View Instructions Download Responses in Excel Download Responses in XML Close Data Request

First Previous Page 1 of 1 Next Last 10 ▾

- 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.

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® PortfolioManager® "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.

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.

Process for Responding to Data Requests

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

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*

Access the Sustainable Buildings Checklist

MyPortfolio | Sharing | Reporting | Recognition

Sample K-12 School (US)
321 Education Way, Phoenix, AZ 85005 | [Map It](#)
Portfolio Manager Property ID: 5933498
Year Built: 1950
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

ENERGY STAR Score (1-100)
Current Score: 2
Baseline Score: 74

Summary | Details | Energy | Water | Waste & Materials | **Goals** | Design

Table with columns: Name, Date Implemented, Estimated Savings, Action. Content: Nothing to display.

Certifications
You can track your third party certifications, such as LEED and Green Globes. This information will automatically be included in your Sustainable Buildings Checklist.

Sustainable Buildings Checklist
Checklist Complete: 0%
● Yes 0%
● Not Applicable 0%
● No 0%
● In Process 0%
● Not Assessed 100%

Checklist completion percentage includes "Yes" and "Not Applicable" responses.

Third Party Certifications
You have not added any third party certifications for this property.
[Add or Edit Third Party Certifications](#)

Sustainable Buildings Checklist
The Sustainable Buildings Checklist evaluates sustainability in existing buildings. It was first developed for US federal building managers to achieve the 2008 Federal Guiding Principles for High Performance Sustainable Buildings. It can also be used for non-government buildings. For guidance in using the 2008 Checklist, see [How to Use the Sustainable Buildings Checklist](#). Updates to this Checklist to reflect the [2016 Guiding Principles](#) are on hold. In the meantime, the 2016 Guiding Principles can be tracked in US federal buildings using [this spreadsheet alternative](#).

Target Date of Compliance: Not Set
Actual Date of Compliance: Not Set

[Start the Checklist](#)

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

Start the Sustainable Buildings Checklist

MyPortfolio | **Sharing** | **Reporting** | **Recognition**

Sustainable Buildings Checklist: Sample K-12 School (US)

The Sustainable Buildings Checklist evaluates sustainability in existing buildings. It was first developed for US federal building managers to achieve the 2008 Federal Guiding Principles for High Performance Sustainable Buildings. It can also be used for non-government buildings. Updates to this Checklist to reflect the [2016 Guiding Principles](#) are on hold. In the meantime, the 2016 Guiding Principles can be tracked in US federal buildings using [this spreadsheet alternative](#).

About this Property

Property Name: [Sample K-12 School \(US\)](#) [View Details & IDs](#)

About this Checklist (Last Updated: 07/14/2017)

Estimated Date of **Sustainable Buildings Checklist** Compliance:

Actual Date of **Sustainable Buildings Checklist** Compliance:

Third Party Certification: None [Select a Third Party](#)

Checklist Manager: [Add Contact](#)

Compliance Documents: 0 files [Upload and View Documents on File](#)

[+ Add Note to this Checklist](#)

Checklist Complete: 0%

Checklist completion percentage includes "Yes" and "Not Applicable" responses.

Generate & Download A Printable Checklist

This Printable Checklist can be used to show all of your responses to date or to prepare your responses in advance.

Download & Print PDF



Complete Checklist Step by Step

Complete the Sustainable Buildings Checklist

- Employ Integrated Assessment, Operation, and Management Principles
 - Integrated Assessment, Operation, and Management
 - Team**
 - Goals
 - Plan
 - Occupant Feedback
 - Commissioning
- Optimize Energy Performance
 - Energy Efficiency
 - Onsite Renewable Energy
 - Measurement and Verification
 - Benchmarking
- Protect and Conserve Water
 - Indoor Water
 - Outdoor Water
 - Storm Water
 - Water Efficient Products
- Enhance Indoor Environmental Quality
 - Ventilation and Thermal Comfort
 - Moisture Control
 - Daylighting and Lighting Controls
 - Low-Emitting Materials
 - Integrated Pest Management
 - Tobacco Smoke Control
- Reduce Environmental Impact of Materials
 - Recycled Content
 - Biobased Content
 - Environmentally Preferable Products
 - Waste and Materials Management
 - Ozone Depleting Compounds

Guiding Principle: Team

Use an integrated team to develop and implement policy regarding sustainable operations and maintenance.

Yes [View References & Resources](#)

No

In Process

Not Assessed

Not Applicable (N/A) - [Justification Required](#)

Supporting Documentation

Team roster or equivalent

Completed "Responsible Team Member" fields

Other

[Upload and View Documents on File](#)

Responsible Team Member

Team Member:

Notes/Comments:

[<< Back](#) [Save & Close](#) [Save & Continue >>](#) [Cancel](#)

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



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

