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# Streamline Portfolio Manager Data Entry with Automated Uploads



# Learning Objectives

This session will provide an overview of Portfolio Manager's data exchange platform and give you key information to assess how your organization can take advantage of automated uploads.

Today's learning objectives include:

- Evaluating options for getting data into Portfolio Manager
- Identifying utilities and 3<sup>rd</sup> parties that offer data exchange services through Portfolio Manager
- Connecting and sharing data with 3<sup>rd</sup> parties that offer data exchange

# Learning Objectives

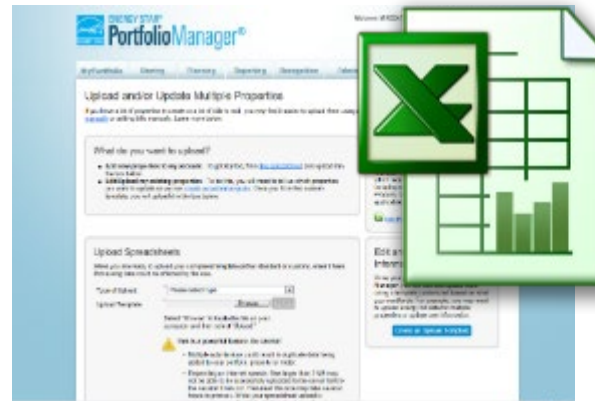
- Evaluating options for getting data into Portfolio Manager
- Identifying utilities and 3rd parties that offer data services through Portfolio Manager
- Connecting and sharing data with 3rd parties that offer data uploads

# Choose the best data management method

## Manual Entry



## Spreadsheet Upload



## Web Services



# Get Data In: Manually

The screenshot displays the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo, followed by the text "ENERGY STAR® PortfolioManager®". Below this is a navigation bar with four tabs: "MyPortfolio", "Sharing", "Reporting", and "Recognition". The "MyPortfolio" tab is active. In the main content area, there is a white box containing the text "Properties (14)" and a blue button labeled "Add a Property" which is circled in red. To the right of this box is a grey box with a blue pushpin icon and text that reads "Portfolio M" and "On August reflect curr STAR scor".



# Get Data In: Spreadsheet Upload



**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.



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:

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.

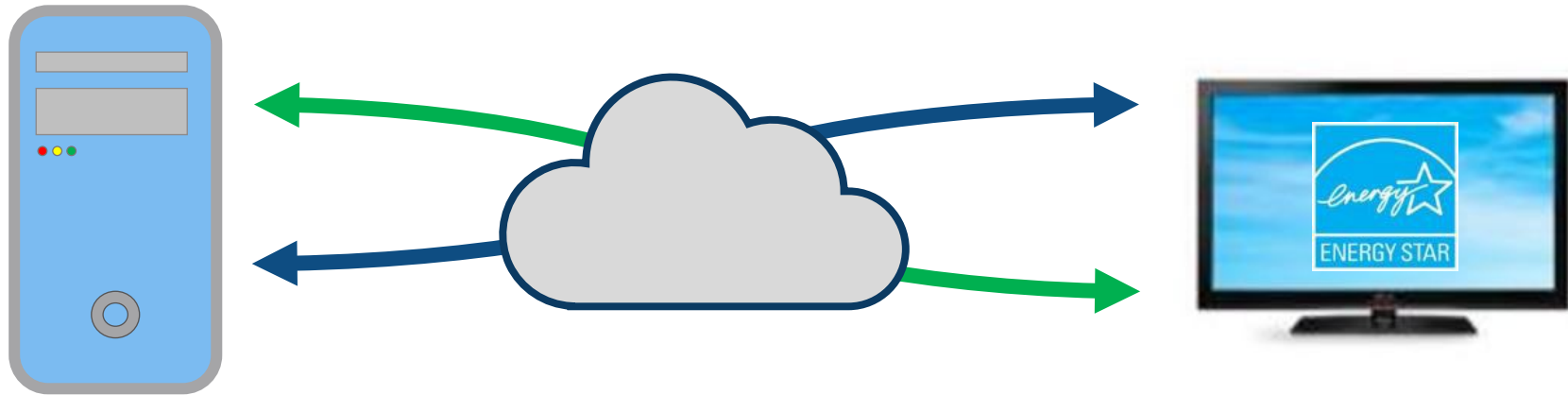
**Edit and Manage Information**

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](#)

# Get Data In: Portfolio Manager Automated Uploads

- Some energy service companies and utilities exchange data with Portfolio Manager to:
  - Manage building and utility data for customers
  - Access the ENERGY STAR score and other performance metrics



# Learning Objectives

- Evaluating options for getting data into Portfolio Manager
- Identifying utilities and 3<sup>rd</sup> parties that offer automated data services through Portfolio Manager
- Connecting and sharing data with 3<sup>rd</sup> parties that offer data uploads



# ENERGY STAR Utility Data Uploads

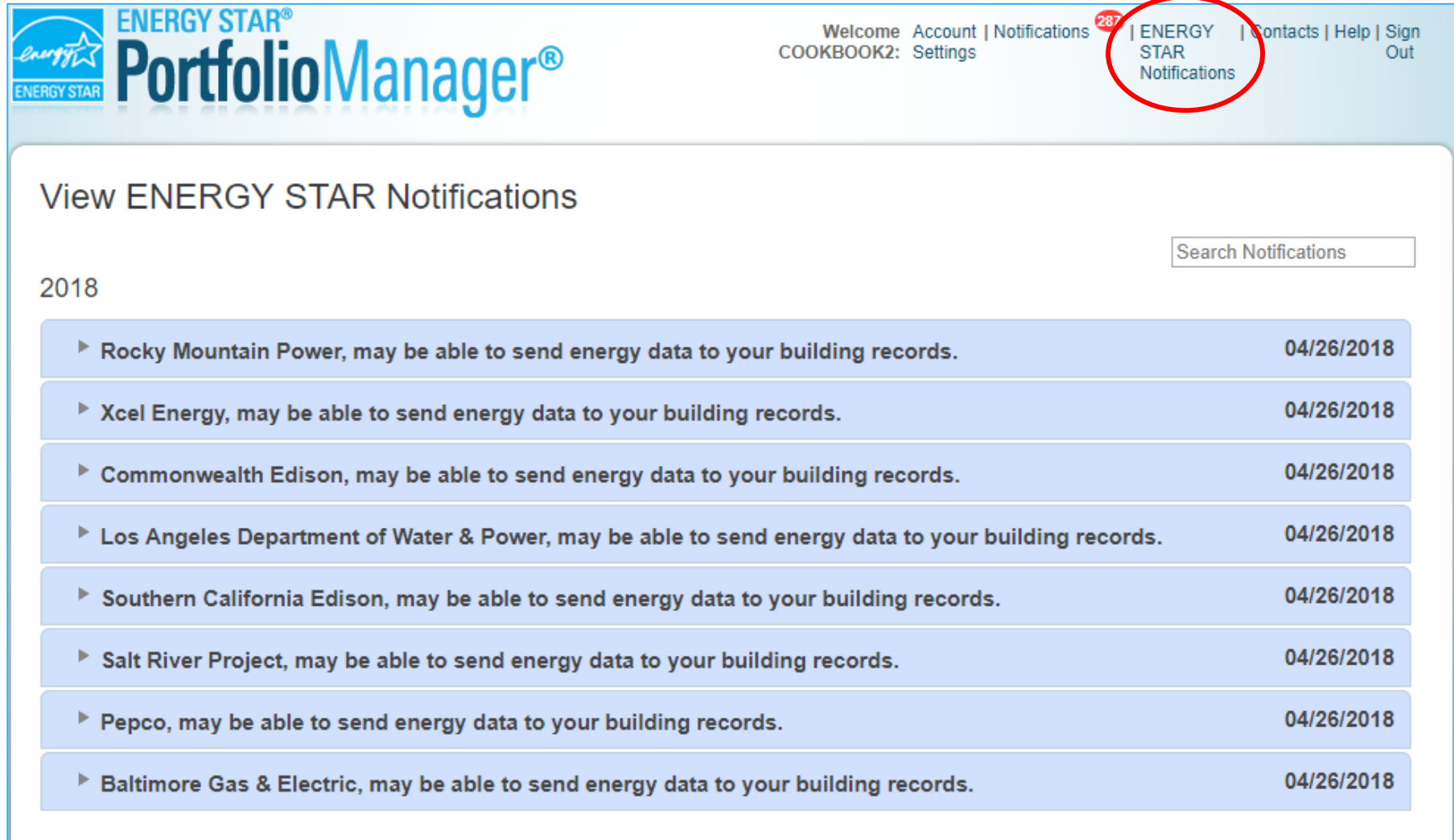
- Utilities can automatically upload energy and water consumption data to your Portfolio Manager account
- Utilities will assume you have *already* set up an account, property, and in some cases, meters



- Three resources to help you get started:
  1. ENERGY STAR Notification Page
  2. Utility Data Access Map
  3. Utility Data Access Fact Sheet



# ENERGY STAR Notifications – Automated Uploads



The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top left is the ENERGY STAR logo and the text "ENERGY STAR® PortfolioManager®". At the top right, there is a navigation menu with links for "Welcome", "Account", "Notifications", "ENERGY STAR Notifications", "Contacts", "Help", and "Sign Out". The "Notifications" link has a red badge with the number "287". Below the navigation menu, the main content area is titled "View ENERGY STAR Notifications". On the right side of this area, there is a search box labeled "Search Notifications". Below the search box, the year "2018" is displayed. A list of eight notifications follows, each in a light blue box with a right-pointing arrow icon. Each notification message is followed by the date "04/26/2018".

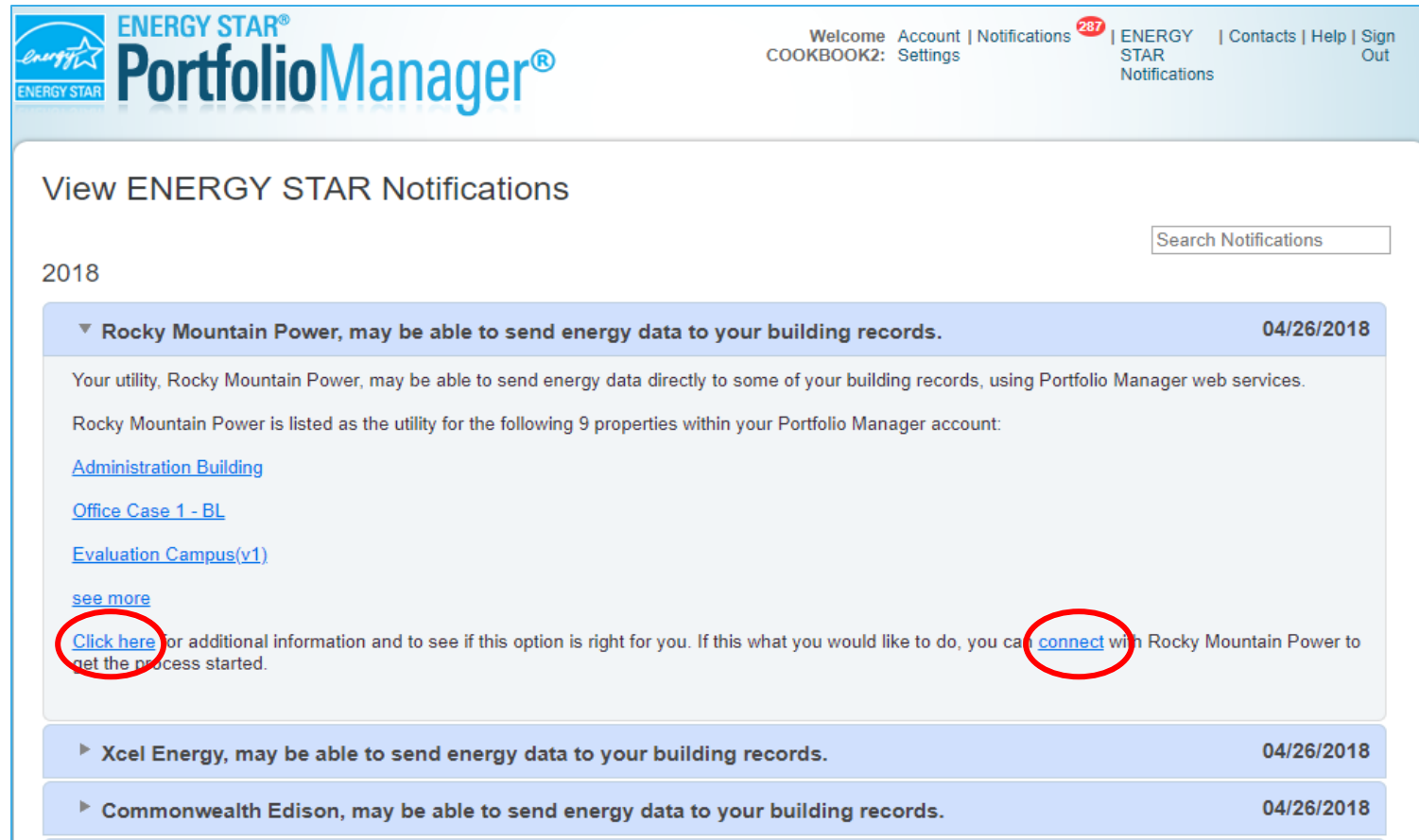
View ENERGY STAR Notifications

Search Notifications

2018

- ▶ Rocky Mountain Power, may be able to send energy data to your building records. 04/26/2018
- ▶ Xcel Energy, may be able to send energy data to your building records. 04/26/2018
- ▶ Commonwealth Edison, may be able to send energy data to your building records. 04/26/2018
- ▶ Los Angeles Department of Water & Power, may be able to send energy data to your building records. 04/26/2018
- ▶ Southern California Edison, may be able to send energy data to your building records. 04/26/2018
- ▶ Salt River Project, may be able to send energy data to your building records. 04/26/2018
- ▶ Pepco, may be able to send energy data to your building records. 04/26/2018
- ▶ Baltimore Gas & Electric, may be able to send energy data to your building records. 04/26/2018

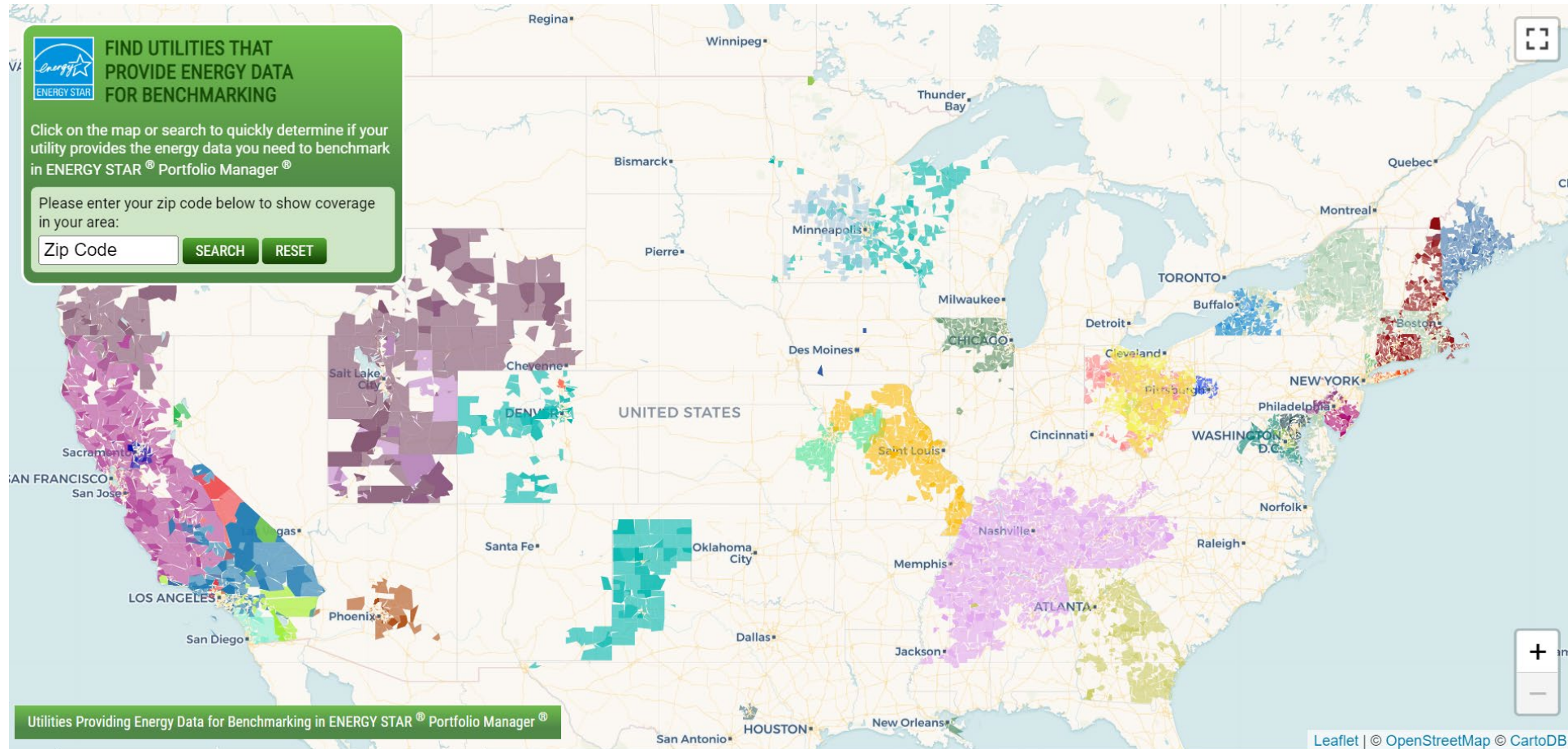
# ENERGY STAR Notifications – Automated Uploads



The screenshot shows the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo and the text "ENERGY STAR® PortfolioManager®". At the top right, there are navigation links: "Welcome COOKBOOK2:", "Account Settings", "Notifications 287", "ENERGY STAR Notifications", "Contacts", "Help", and "Sign Out". Below the navigation is a search bar labeled "Search Notifications". The main content area is titled "View ENERGY STAR Notifications" and shows a list of notifications for the year 2018. The first notification is from Rocky Mountain Power, dated 04/26/2018, with a dropdown arrow on the left. The notification text states: "Your utility, Rocky Mountain Power, may be able to send energy data directly to some of your building records, using Portfolio Manager web services. Rocky Mountain Power is listed as the utility for the following 9 properties within your Portfolio Manager account: Administration Building, Office Case 1 - BL, Evaluation Campus(v1), see more, Click here for additional information and to see if this option is right for you. If this what you would like to do, you can connect with Rocky Mountain Power to get the process started." The "Click here" and "connect" links are circled in red. Below this notification are two other notifications from Xcel Energy and Commonwealth Edison, both dated 04/26/2018, with right-pointing arrows on the left.

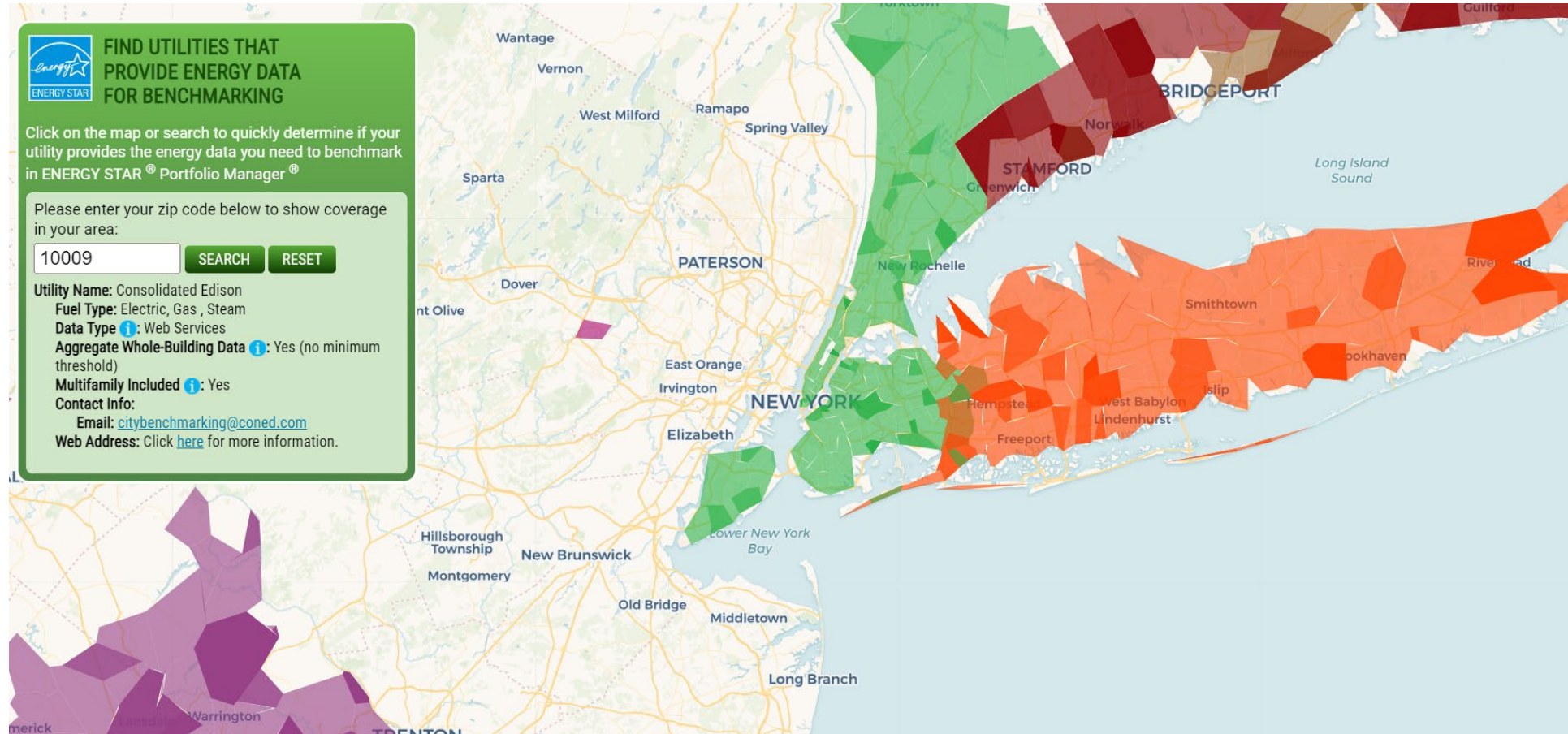
*Expand the notification for more information or to connect with the utility; connecting is the first step for using automated uploads*

# Utility Data Access Map – Automated Uploads



[https://www.energystar.gov/buildings/utility\\_map](https://www.energystar.gov/buildings/utility_map)

# Utility Data Access Map – Automated Uploads



# Utility Data Access Fact Sheet – Automated Uploads

## Utilities Providing Energy Data for Benchmarking in ENERGY STAR Portfolio Manager

The simple choice for energy efficiency.



### Utilities Providing Energy Data to Commercial Customers to Assist with Benchmarking in Portfolio Manager

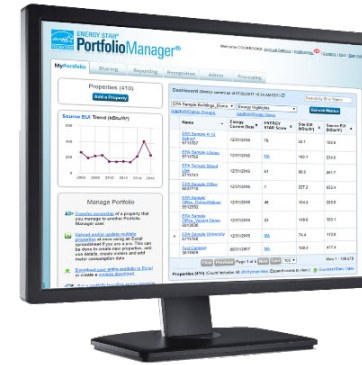
State	Utility Name	Aggregate Whole-Building Data? <sup>1</sup>	Multifamily Included?	Format	Contact Information
AZ	Salt River Project	No	No	Web Services	<a href="mailto:abssupport@srpnet.com">abssupport@srpnet.com</a>
CA	Los Angeles Department of Water and Power	Yes (commercial buildings – 3; multifamily properties – 5)	Yes	Web Services	<a href="mailto:usagedata@ladwp.com">usagedata@ladwp.com</a> Click <a href="#">here</a> for more information
CA	Pacific Gas & Electric	Yes (commercial buildings – 3; multifamily properties – 5)	Yes	Web Services	<a href="mailto:benchmarking@pge.com">benchmarking@pge.com</a> Click <a href="#">here</a> for more information
CA	Pacific Power	Yes (5)	Yes	Web Services	<a href="mailto:portfoliomangersupport@ems.schneider-electric.com">portfoliomangersupport@ems.schneider-electric.com</a> Click <a href="#">here</a> for more information
CA	Sacramento Municipal Utility District	Yes (commercial buildings – 3; multifamily properties – 5)	Yes	Web Services	<a href="mailto:benchmark@smud.org">benchmark@smud.org</a> Click <a href="#">here</a> for more information
CA	San Diego Gas & Electric	Yes (commercial buildings – 3; multifamily properties – 5)	Yes	Web Services	<a href="mailto:benchmarking@sdge.com">benchmarking@sdge.com</a> Click <a href="#">here</a> for more information
CA	Southern California Edison	Yes (commercial buildings – 3; multifamily properties – 5)	Yes	Web Services	<a href="mailto:benchmarking@sce.com">benchmarking@sce.com</a> Click <a href="#">here</a> for more information

[https://www.energystar.gov/buildings/tools-and-resources/utilities\\_increase\\_access\\_energy\\_data\\_help\\_commercial\\_customers\\_benchmark](https://www.energystar.gov/buildings/tools-and-resources/utilities_increase_access_energy_data_help_commercial_customers_benchmark)



## Other 3<sup>rd</sup> Party Web Service Providers

- Many energy services companies integrate Portfolio Manager into their own software and other value-added services
- There are several ways that service providers can help you benchmark including:
  - External energy management software platforms
  - Comprehensive data management
  - Automated Portfolio Manager data uploads



## 3<sup>rd</sup> Party Software



### Metrics from ENERGY STAR® Portfolio Manager

Total annual site energy use	1,441,196	kBtu/yr
Total annual source energy use	4,793,875	kBtu/yr
Site energy use intensity	21	kBtu/ft <sub>2</sub> /yr
Source energy use intensity	68	kBtu/ft <sub>2</sub> /yr
Total annual greenhouse gas emissions (metric tons/yr)	203	MtCO <sub>2</sub> -eq

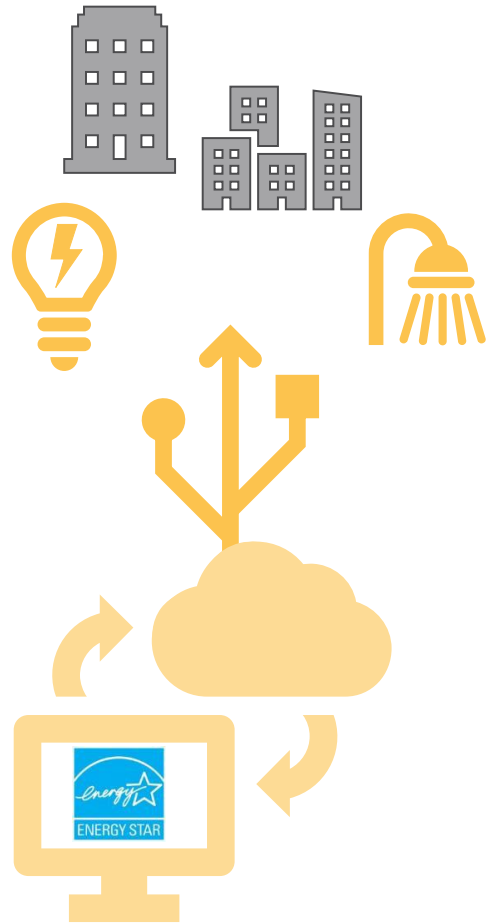
### ENERGY STAR Score

**98**

On a 1 to 100 scale  
For the 12-month period  
ending 9/30/20



# Automated Data Entry



- *If you already have a Portfolio Manager account and properties set up, this can involve the entry and upkeep of accurate property and meter data across your portfolio*
- *If you haven't used Portfolio Manager before, some companies can create accounts, property records, and meter records for the buildings in your Portfolio*

# Online List of Service Providers

## Service Providers That Exchange Data with Portfolio Manager via Web Services

The companies listed below can electronically enter your utility and/or property data into Portfolio Manager, and sync your data and ENERGY STAR metrics with their energy information software. They do this through a process called Web Services where they “exchange data” between their systems and [Portfolio Manager](#). This limits the manual data entry that you need to handle, and ensures that updated ENERGY STAR metrics are available when and where you need them! This helps you to focus on managing your buildings, not your data. Some organizations below offer this service for free, while others integrate it into their fee-based software or other value-added services.

NOTE: The list below is limited to software companies, consultants, and other non-utility providers of Portfolio Manager web services. If you’re interested in understanding which utilities across the country are offering access to data for benchmarking via web services, please use our interactive map to [find utilities that provide energy data for benchmarking](#).

This list shows Web Services activity for the past 12 months, updated quarterly.

Please note, the links below leave the [energystar.gov](#) domain. For more information visit our [Exit Disclaimer](#).

Provider Name	Service or Software Product Using Web Services	Contact Person	Number of Properties Benchmarked in the Last 12 Months <sup>1</sup>
ENGIE Impact	<a href="#">Energy Management Services</a>	Paige Janson 513-763-3129	38523
Schneider Electric	<a href="#">Resource Advisor (two-way system)</a>	Erik Mohn 502-429-3800 <a href="mailto:erik.mohn@ems.schneider-electric.com">erik.mohn@ems.schneider-electric.com</a>	35669
Measurabl, Inc.	<a href="#">Measurabl</a>	Measurabl Team 619-719-1716 <a href="mailto:info@measurabl.com">info@measurabl.com</a>	27305
Conservice, LLC	<a href="#">Conservice Data Solutions, including Capturis and Goby</a>	Ryan Nelson 312-242-1739 <a href="mailto:rnelson@conservice.com">rnelson@conservice.com</a>	21387
Willdan Group, Inc.	<a href="#">B3 Benchmarking</a>	Cheri Schneider 952-939-1878	18042

# 380 Providers Exchange Data with Portfolio Manager



# Learning Objectives

- Evaluating options for getting data into Portfolio Manager
- Identifying utilities and 3rd parties that offer automated data services through Portfolio Manager
- Connecting and sharing data with 3rd parties that offer data uploads

## Two Steps to Sharing Properties

1. Confirm you are connected to the web service provider you want to share with on the Contacts page. If needed, send a connection request by clicking on “Add Contact”
2. Share one or more of your properties with your connected web service provider and specify the level of access the contacts will be granted to view and/or edit your properties

# Add and Connect with Contacts

ENERGY STAR® PortfolioManager®

Welcome Account Settings **Contacts** Help | Sign Out

MyPortfolio Sharing Reporting Recognition

### My Contacts and Organizations

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.

**Contacts** Organizations

Search existing contacts

**Add New Contacts/Connections**

<input type="checkbox"/>	Name (title)	Organization	Connection Status	Username
<input type="checkbox"/>	<a href="#">Alice Bell</a> Energy and Sustainability Researcher	ICF	Connected	PM101Demo
<input type="checkbox"/>	<a href="#">Rosemary Wallace</a> Energy & Sustainability Researcher	ICF	Connected	RW_Processor
<input type="checkbox"/>	<a href="#">Sky Scraper</a>	201 Inc	Not connected	
<input type="checkbox"/>	<a href="#">Sky Scraper</a>	201 Inc	Not connected	
<input type="checkbox"/>	<a href="#">Sky Scraper</a>	201 Inc	Not connected	

First Previous Page 1 of 1 Next Last 25 1 - 5 of 5

Delete selected entries  Download all contact information

Share properties with selected connected contacts



# Find Contacts

MyPortfolio   Sharing   Reporting   Recognition

## Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account. If you find the person, send a Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact you would like to add does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

### Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:

Organization:

Username:

Email:

**i Connecting with Other Users**

If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily [share your property](#) information with your contacts.

.....

**i Keeping Personal Contacts**

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

.....

**i Organizing Personal Contacts by**

# Connection Request Confirmed

The screenshot displays the Energy Star Portfolio Manager interface. At the top, the logo and navigation tabs (MyPortfolio, Sharing, Reporting, Recognition) are visible. A green notification box is highlighted with a red circle, containing the text: "A connection request has been sent to Tamela Reuter. When Tamela accepts your request, you will be able to share property information." Below this, the "Search Results" section is partially visible. The main content area shows a "Properties (9)" widget with an "Add a Property" button, a "Source EUI Trend (kBtu/ft²)" chart, and a "Notifications (2) View All" widget. The notification widget is also highlighted with a red circle and contains the text: "You have sent a connection request to Tamela Reuter. Once they have accepted the request, you will be able to share properties with Tamela Reuter." It includes "Cancel" and "Clear" buttons. At the bottom, another "Properties (9)" widget is shown with an "Add a Property" button.



# Connection Confirmed

MyPortfolio   Sharing   Reporting   Recognition

Properties (1)

**Add a Property**

Notifications (1)

← ✓ You are connected to [Tamela Reuter](#). Clear



# Sharing Tab – Overview

The screenshot shows a web application interface with a top navigation bar containing five tabs: MyPortfolio, Sharing, Reporting, Recognition, Admin, and Processing. The 'Sharing' tab is currently selected. Below the navigation bar, the main content area is divided into two sections. On the left, a box titled 'My Shared Properties (7)' contains three blue buttons: 'Share (or Edit Access to) a Property', 'Share with your Utility or Service Provider for exchanging data' (which is circled in red), and 'Download Sharing Report'. On the right, a box titled 'Sharing Notifications (38)' includes a link 'View All' and a button labeled 'View all notifications'.



## Share Properties for Exchanging Data

Choose Permissions

Set Up Connections

Check Existing Permissions

View Results/ Confirmation

Sometimes it's really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

### Select your Web Services Provider



#### Select Web Services Provider (Account)

Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.

Select web services provider from my contacts book:

Bill Von Neida (BILLVONNEIDA)



Unlike "regular sharing," when you "bulk share" with a Web Service Provider, you can only pick one provider. This is because the bulk share depends on the requirements/settings of the provider.

- One Property
- Multiple Properties
- All Properties



#### Select Properties

Which Properties do you want to share? *Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.*

- Select Number of Property(ies) -



#### Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- Bulk Sharing ("One-Size-Fits-All")** - I want to give all my properties and meters the same permissions.
- Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

**Set Permissions**

[Cancel](#)

# Share Your Property: Multiple Properties

Welcome Kaye Lynch-Sparks: Account Settings | Contacts | Help | S

### Select Properties

<input type="checkbox"/>	Name	Primary Function	State/Province
<input type="checkbox"/>	<a href="#">Big Bank</a>	Bank Branch	VA
<input type="checkbox"/>	<a href="#">Kids Daycare</a>	Pre-school/Daycare	NC
<input type="checkbox"/>	<a href="#">Office 1</a>	Office	DC

Selected Properties: 0 ([View Selection](#))

#### Filter Properties (3)

[Filter by Group](#) ([Create New Group](#))

- Group 1 (1)
- Group 2 (2)

#### Filter by Primary Function

- Bank Branch (1)
- Office (1)
- Pre-school/Daycare (1)

#### Filter by Construction Status

- Existing (2)
- Project (1)

#### Filter by State/Province

- District of Columbia (D.C.) (1)
- North Carolina (1)
- Virginia (1)

[Apply Selection](#) [Cancel](#)



### Select Properties

<input type="checkbox"/>	Name	Primary Function	State/Province
<input type="checkbox"/>	<a href="#">Big Bank</a>	Bank Branch	VA
<input type="checkbox"/>	<a href="#">Office 1</a>	Office	DC

Selected Properties: 0 ([View Selection](#))

#### Filter Properties (3)

[Filter by Group](#) ([Create New Group](#))

- Group 1 (1)
- Group 2 (2)

#### Filter by Primary Function

- Bank Branch (1)
- Office (1)
- Pre-school/Daycare (1)

#### Filter by Construction Status

- Existing (2)
- Project (1)

#### Filter by State/Province

- District of Columbia (D.C.) (1)
- North Carolina (1)
- Virginia (1)

[Apply Selection](#) [Cancel](#)



## Choose Permissions – Bulk Sharing



### Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- Bulk Sharing ("One-Size-Fits-All")** - I want to give all my properties and meters the same permissions.
  - Exchange Data Full Access (with full access to all properties and meters)
  - Exchange Data Read Only Access (with read only access to all properties and meters)
  - Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)
  - Remove Access (i.e. remove existing access to all properties)
- Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.



# Authorize Data Exchange

## Bulk Share Properties for Exchanging Data: Results



✔ **Congratulations! You have successfully shared/edited access to your property(ies).**

A total of 1 share requests were sent.

If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

Close

# Sharing Notifications Appear in Both Accounts

User who shares a property receives a notification

The screenshot shows the 'MyPortfolio' interface with tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. A green notification box at the top states: "You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required." Below this, the 'My Shared Properties (6)' section contains three buttons: 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. To the right, the 'Sharing Notifications (1)' section contains a notification for 'Hotel Building 1 - Sharing request sent to ENERGY STAR TRAINING' with 'Cancel' and 'Clear' buttons. A red arrow points from the text on the left to the notification.

User with whom a property is shared also receives a notification

The screenshot shows the 'MyPortfolio' interface with tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The 'My Shared Properties (1)' section contains three buttons: 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. To the right, the 'Sharing Notifications (1)' section contains a notification for 'Hotel Building 1 - Shared from Andrew Schulte (Full Access)' with 'Accept' and 'Reject' buttons. A red arrow points from the text on the left to the notification.

# Edit/Update Sharing Permissions

MyPortfolio
Sharing
Reporting
Recognition

**My Shared Properties**  
(3)

Share (or Edit Access to) a Property

Set Up Web Services/ Data Exchange

Download Sharing Report

**Sharing Notifications (0)**

You have no new notifications.

Overview of Shared Properties [Learn more about Sharing Properties](#)

By Contact
By Property

Owned By (PDA):
Anyone
Shared By:
Anyone
In Group:
All Properties

Search

Name	My Permissions	Property Data Administrator	Can I Share With Others?	# of People With Access	Action
<a href="#">123 main street</a>	<a href="#">Property Data Administrator</a>	ICF International (ENERGY STAR TRAINING)	Yes	2	I want to... <span style="float: right;">▼</span>
<a href="#">Sample Office</a>	<a href="#">Property Data Administrator</a>	ICF International (ENERGY STAR TRAINING)	Yes	2	I want to... <span style="float: right;">▼</span>
<a href="#">Sample Supermarket</a>	<a href="#">Property Data Administrator</a>	ICF International (ENERGY STAR TRAINING)	Yes	3	I want to... <span style="float: right;">▼</span>

⏪ ⏴
Page 1
of 1
⏵ ⏩
50

View 1 - 3 of 3

? This table represents properties in the portfolio that you have shared with others, or that others have shared with you. For complete sharing information, [download the Sharing Report](#) for your portfolio.





# Recap

- We learned how to:
  - ✓Evaluating options for getting data into Portfolio Manager
  - ✓Identifying utilities and 3rd parties that offer automated data services through Portfolio Manager
  - ✓Connecting and sharing data with 3rd parties that offer data uploads

# Summary of Automated Data Resources

- Utility data uploads:

- Data Access Map:

[https://www.energystar.gov/buildings/owners\\_and\\_managers/existing\\_buildings/use\\_portfolio\\_manager/find\\_utilities\\_provide\\_data\\_benchmarking](https://www.energystar.gov/buildings/owners_and_managers/existing_buildings/use_portfolio_manager/find_utilities_provide_data_benchmarking)

- Data Access Fact Sheet:

[https://www.energystar.gov/buildings/tools-and-resources/utilities\\_increase\\_access\\_energy\\_data\\_help\\_commercial\\_customers\\_benchmark](https://www.energystar.gov/buildings/tools-and-resources/utilities_increase_access_energy_data_help_commercial_customers_benchmark)

- List of providers that exchange data with Portfolio Manager:

[https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/save-energy/expert-help/find-spp/web\\_services](https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/save-energy/expert-help/find-spp/web_services)

- How to connect with other Portfolio Manger users:

[https://www.youtube.com/watch?v=HV5uMS4BndU&feature=emb\\_title](https://www.youtube.com/watch?v=HV5uMS4BndU&feature=emb_title)



# Additional Help

- Visit [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp)
  - Extensive list of FAQs
  - Online form to submit technical questions or comments
- Additional Portfolio Manager training resources available at: [www.energystar.gov/buildings/training](http://www.energystar.gov/buildings/training)
  - Step-by-step documents (PDF)
  - Access to recorded trainings and short videos
  - Information on upcoming trainings
- Register for regular webinars at: <http://esbuildings.webex.com>
- Portfolio Manager Technical Reference Series: <https://energystar-mesa.force.com/PortfolioManager/s/article/Where-can-I-find-Technical-Reference-Documents-for-Portfolio-Manager-1600088554112>

# 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](http://www.energystar.gov/BuildingsHelp)

