

How to Set up Your Property

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

Setting up your property is quick and easy with Portfolio Manager. There are two ways to set up your property or properties in your portfolio.

- ✓ Set up your property manually.
- ✓ Upload your property information using spreadsheet templates (creating multiple properties at once and updating default property use details).

Setting up Your Property Manually

To get started, log into Portfolio Manager at https://portfoliomanager.energystar.gov/pm/login.html. Then, follow these instructions to set up your property.

- 1. Click Add a Property on the MyPortfolio tab.
- Select your primary Property Type, the number of buildings, and your Property's construction status.
 NOTE: While all property types can be benchmarked, not all property types are eligible to get an ENERGY STAR Score or apply for ENERGY STAR certification. A full list of eligible property types can be found in the_ ENERGY STAR Buildings FAQs.
- 3. Click Get Started!
- 4. Enter basic property information. At the bottom of each page, Portfolio Manager ask questions specific to the primary property type selected. Select the boxes next to the statements that apply to your property. Then click **Continue**.
- 5. Enter Use Details for your primary property use. Use details with blue stars are required. If necessary, you can use default or temporary values at this time and

Property Types

All property types can be benchmarked. For properties with multiple buildings, only hospitals, hotels, K-12 schools, multifamily, and senior living communities are eligible to receive the 1 – 100 ENERGY STAR score. Additional information on campuses can be found in the ENERGY STAR Buildings FAQs.

Properties with Multiple Use Types

Only break out separate property use types if they meet one of the following criteria:

- The Property Use can get an ENERGY STAR Score. (Note: Retail can only get a score if it meets certain requirements, including that it is more than 5,000 sq ft.).
- 2. It accounts for more than 25% of the property's GFA.
- It is a vacant/unoccupied Office or Medical Office (and the vacancy is greater than 10% of the property's GFA).
- The Weekly Hours differ by more than 10% for the same Property Type AND that Property Type can get a score (ex: you have two Office tenants, and their hours differ by more than 10%).

Otherwise, simply include their square footage with the building's primary use.

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enter more accurate data later. Additional property use types can also be added at this point (see sidebar for discussion of when to break out a separate property use type). NOTE: Mouse over the name of any Use Detail to see a definition.

- 6. Click **Add Property**. When you have successfully added your property, you will see the property's Summary tab.
- 7. This property has now been added to your portfolio and can be accessed from the MyPortfolio tab.



When entering different Building Use Types. be sure that the total square footage for all use types, excluding parking, adds up to equal the entire property Gross Floor Area entered previously. Otherwise, you will get an error message.

Using Spreadsheet Uploads

Adding Properties

- 1. Log into Portfolio Manager. In your MyPortfolio tab, select Upload and/or update multiple properties at once from the Manage Portfolio menu on the bottom left of the page.
- 2. Click on Add Properties Template on the right-hand side of the page.
- 3. Save the spreadsheet file that loads in your browser, and then open it to enter your property information. Be sure to read the Instructions tab before starting. When you are finished entering information, save the spreadsheet to your computer. **NOTE:** Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.

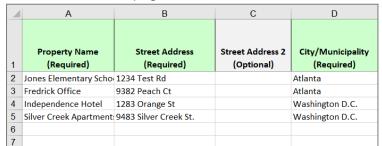


Figure 1: Spreadsheet template for adding properties

- 4. When you are ready to upload this file, go back to the **Upload and/or Update Multiple Properties** page (where you originally generated the spreadsheet).
- 5. Select **Add New Properties** for each type of Upload.
- 6. Browse to the completed template saved on your computer, click **Open**, and then click **Upload**. **NOTE:** This template uses default values for all property use details. To use non-default values, you will need to use the "Update Property Use Details". Instructions on how to use this template can be found in the next section of this document. My Spreadsheet Uploads
- 7. The My Spreadsheet Uploads section will appear on the page, so you can view the status of your upload. If the upload fails, you can click on View the errors are corrected you can reupload the spreadsheet.
- 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 **Errors** to see what changes need to be made. Once Add_Properties_en (1).xls New Property 6/25/2019 11:48 AM 🔂 Success X Delete Selected Entries

8. Your file will have a status of **Success** if it has been uploaded.

Figure 2: Record of spreadsheet uploads

9. You can now view the added properties in the **MyPortfolio** tab.

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Updating Default Property Use Details

- 1. Go to your **MyPortfolio** tab.
- 2. Click on **Upload and/or update multiple properties** on the bottom left-hand side.
- 3. Click on **Create an Upload Template** on the right-hand side.
- 4. Select **Update Use Details for Existing Properties**.
- 5. Select the number of property or properties you would like to update and the information you would like to update.



Figure 3: Create a Custom Upload template screenshot

6. Click Create & Download Template.

Save the spreadsheet file that loads in your browser, and then open it to enter your property information. **Be sure to read the Instructions tab before starting.** For each property use detail that was entered as a default upon initial property creation, you will need to provide the correct, accurate value. **NOTE:** Since Portfolio Manage treats this process as an "update," you will need to change the "Current As of Date" for each updated use detail to be one day later than the date currently specified. When you are finished entering the updates for your properties, save the spreadsheet.

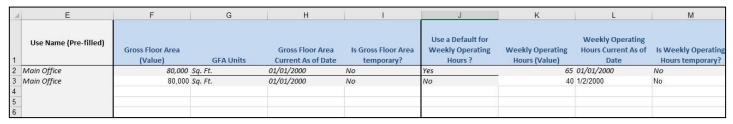


Figure 4: Downloaded spreadsheet where uploads should be made and saved

- 7. When you're ready to upload this file, go back to the **Upload and/or Update Multiple Properties** page (where you originally generated the spreadsheet).
- 8. Select **Update Use Details for Existing Properties** as your Type of Upload.
- 9. Browse to the completed template you saved on your computer, click **Open**, and then click **Upload**.
- 10. The **My Spreadsheet Uploads** section will appear on the page, so you can view the status of your upload. If the upload fails, you can click on **View Errors** to see what changes need to be made. Once the errors are corrected you can reupload the spreadsheet.
- 11. Your file will have a status of **Success** if it has been uploaded.
- 12. You can now view the updates to your property(ies) in the MyPortfolio tab.

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Learn More!

To learn more about Portfolio Manager, visit https://www.energystar.gov/buildings/benchmark.

To get answers to your questions, visit www.energystar.gov/buildingshelp.

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