How to Enter and Manage Tenant Spaces in ENERGY STAR® Portfolio Manager®

The U.S. Environmental Protection Agency’s (EPA) ENERGY STAR Portfolio Manager tool helps building owners and tenants measure and track energy, water use, and waste, all in a secure online environment.

Users of Portfolio Manager enter information at the “property” level. A property can be a whole building, a campus of buildings, an individual tenant space, or even a common area within a building. This guidance describes how to create a tenant property, as well as how to link tenant properties to the whole building.

I. Create a Portfolio Manager Account
Go to www.energystar.gov/portfoliomanager and register for a new account. Once your account is set up, you are ready to enter your tenant space. If you have an existing Portfolio Manager account, proceed directly to step II.

II. Enter Your Tenant Space Property
1. Click Add a Property on the MyPortfolio tab to get started.
2. On the Set up a Property: Let’s Get Started page, select the option that indicates your property is part of a building:

   ![Property's Buildings](image)
   How many physical buildings do you consider part of your property?
   - None: My property is part of a building
   - One: My property is a single building
   - More than One: My property includes multiple buildings (Campus Guidance)
   How many?

3. On the Set up a Property: Basic Property Information page, enter information about the tenant space. Enter the usable square feet of the space, which includes all areas within the exterior and/or demising walls that define the perimeter of the tenant space.
4. On the Set up a Property: How is it used? page, enter the required Use Details to describe the operation of the tenant space.
5. Enter the energy use (and/or water, waste) for the tenant space.

Consider using a naming convention that makes it easy to recognize the tenant relationship to other properties in the building (e.g. other tenant spaces and common area), as well as to the
whole building, at a glance. For example, if you are creating several tenant properties within one building, you might name them as follows:

- 100 Main Street – Suite 100
- 100 Main Street – Suite 200

EPA recommends that tenants collaborate with their landlords in developing a naming convention.

For more general information on how to benchmark a property (much of which also applies to tenant spaces), see the Portfolio Manager Quick Start Guide at https://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-quick-start-guide or take one of the live or recorded training sessions at www.energystar.gov/buildings/training.

III. Share Your Tenant Property with Your Landlord

Tracking whole building energy use is important for energy efficiency, and required for ENERGY STAR certification. For that reason, your landlord may ask for your energy and use data. Sharing via Portfolio Manager is an easy way to provide that information, and keep it up to date.

Learn how to share your tenant space data: www.energystar.gov/buildings/tools-and-resources/how-share-data-other-users-portfolio-manager

IV. Create a Group

This feature is helpful for tenants with multiple properties within a building and for landlords who want to view, share, or report tenant properties alongside the whole building in Portfolio Manager.

Creation of a “Group” within your Portfolio Manager account allows you to bucket all the tenant properties within a single building that you manage (and potentially the whole building and/or common area property as well). To create a Group:

Select Add/Edit/Delete Groups.
1. Follow the steps to name your Group, select the properties you would like to add to it, and decide whether you want it to be the default group displayed when you log in.
2. Click Create. The Group will now appear in the drop-down menu. In our example, we have called the Group “Tenant Spaces.”
V. Using Reports to Calculate Performance Metrics
The reporting feature in Portfolio Manager allows you to run a report for each property and group with key metrics, such as Energy Use Intensity (EUI), and download the results in an Excel spreadsheet. You can use the pre-existing report templates or create your own, custom report by clicking the “Create a New Template” button.

In Step 3, “Select Properties,” you can choose any group in your portfolio. The custom report will include only properties in that group.
In step 4 of Creating a Report Template, “Select Information & Metrics,” if you’re including properties from more than one group in the report, be sure to include the metric for “Group(s)” (found under Property Information) as one of the reporting metrics, so that you can sort and filter by Group in the results.


Learn More!
To learn more about Portfolio Manager, visit www.energystar.gov/portfoliomanager.
To get answers to your questions, visit www.energystar.gov/buildingshelp.