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

EPA’s 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 can enter information for a whole building, a campus of buildings, an individual tenant space, or even a common area within a building. This guidance describes how to properly benchmark a tenant space within a larger property, as well as how to perform related tasks such as sharing the tenant space record with your landlord, organizing your tenant space records into groups, and using Portfolio Manager reporting functionality to track the performance of your space.

Please note that tenant spaces, on their own, are not eligible to apply for ENERGY STAR Certification. However, individual office tenants may be eligible for ENERGY STAR Tenant Space recognition. Tenant Space recognition is currently available only to Office and Financial Office spaces. Future phases of the program will offer recognition to additional property types.

1 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 2.

2 Enter Your Tenant Space into Portfolio Manager

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 your property type. Then, under “Your Property’s Buildings,” select the first option to indicate that your tenant space is part of a larger building:

   ![Diagram of buildings]

   - None: My property is part of a building (e.g., a Tenant Space)
   - One: My property is a single building
   - More than One: My property includes multiple buildings (Campus Guidance)

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1 Non-diagnostic medical office spaces are eligible for ENERGY STAR Tenant Space recognition but must be entered into Portfolio Manager as Office rather than Medical Office properties.

2 Tenant Space recognition is currently available only to Office (including non-diagnostic medical offices) and Financial Office spaces. The term “office” in the remainder of this guide should be understood to refer to all of these eligible space types.
3. On the Set up a Property: Basic Property Information page, enter the required information about the tenant space you are benchmarking. Prospective applicants for ENERGY STAR Tenant Space recognition should include the square footage of all of the office space leased by a single tenant within the building, combined into one space (even if that space is not all contiguous). You will have the opportunity later on to break out individual floors/suites leased by the tenant.

EPA recommends that tenants collaborate with their landlords in developing a naming convention for tenant spaces, particularly if multiple tenant spaces within a single building are being tracked in Portfolio Manager. This way, once you share your tenant space record(s) with your landlord (see Step 3 below), it will be easier for the landlord to keep track of individual tenant space records and to view them alongside their own record for the property as a whole.

When setting up your tenant space, keep the following points in mind:

- Name and address information should apply to the tenant space, rather than the base building. Be sure to include a floor/suite number if applicable.
- “Year Built” should be the year the larger base building was constructed (as opposed to the date of the tenant space occupation/fit-out).
- “Gross Floor Area” should be the usable square feet of the tenant space, which includes all areas within the exterior and/or demising walls that define the perimeter of the space. To be eligible for Tenant Space recognition, enter the usable square feet of all office space leased by a single tenant.
- Occupancy percentage should apply to the tenant space only, rather than the larger base building. (The percent chosen here does not affect eligibility for Tenant Space recognition.)
- To be eligible for Tenant Space recognition, your tenant space’s energy consumption may include tenant parking areas, and the space may include a data center. However, the space should not include any retail, restaurant, cafeteria, or other non-office space. If you indicate during property setup (see checkboxes below) that the property includes parking and/or a data center, be sure to include Parking and Data Center property uses with accurate square footage values at the next step in the setup process.

Do any of these apply?

- My property’s energy consumption includes parking areas
- My property has a Data Center that requires a constant power load of 75 kW or more
- My property has one or more retail stores (that are eligible for a Retail score)
- My property has one or more restaurants/cafeterias

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. You can use the default values to get
started if you don’t have this information readily available. If you plan to apply for ENERGY STAR Tenant Space recognition, you should now see this box in the Summary tab and are ready to begin your application in the Tenant module within Portfolio Manager. You will enter most of the tenant space use detail information on an individual floor/suite basis in the module.

5. On the Energy tab, set up one or more meters as necessary to reflect the energy consumed in the operation of your space, and for which you have full operational control. You can also enter water consumption data on the Water tab, and waste data on the Waste & Materials tab. For more information on how to create and populate meters, see the resource “How to get utility data into Portfolio Manager.” You are not required to set up meters as described here to achieve Tenant Space recognition, though we encourage you to do so in order to track and benchmark your tenant space moving forward.

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 or visit www.energystar.gov/buildings/training to access live and recorded training sessions.

**Share Your Tenant Property with Your Landlord**

Tracking whole building energy use is important for energy efficiency and is required for ENERGY STAR certification. For that reason, your landlord may ask for your help in obtaining energy use data – especially if you are billed directly from the utility and the landlord does not have another way to calculate energy consumption data across the entire building. Sharing via Portfolio Manager is an easy way to provide that information and keep it up to date.

Agreement to share your energy and other data with your landlord, upon landlord’s request, is a requirement for spaces seeking Tenant Space recognition. There is a place in the application to indicate that this agreement has been made.

Learn how to share your tenant space data using this guide or this video.

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3 To be eligible for Tenant Space recognition, your tenant space must have energy meters in place, but you will not need to submit actual energy data to EPA at this time. EPA recommends that you set up meters and begin tracking your energy, water, and waste data to measure performance and gauge improvements.
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 information on tenant space energy performance alongside the whole building in Portfolio Manager. If you are a tenant benchmarking your space only, you can skip this step.

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:

1. Select Add/Edit/Delete Groups, then click on Create a Group from the following screen.

![Dashboard Screenshot]

2. 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.

3. Click Create. The Group will now appear in the drop-down menu of the Dashboard on the MyPortfolio tab. In our example, we have called the Group “Tenant Spaces.”
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.
From here, you can define your custom reporting template.

![Create a Report Template](image)

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, “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.

For more information and step-by-step instructions on using reports, see “How to generate standard reports and performance documents in Portfolio Manager” and the “Portfolio Manager Custom Reporting Guide.”

4 Learn More!

To learn more about Portfolio Manager, visit [www.energystar.gov/portfoliomanager](http://www.energystar.gov/portfoliomanager).
To get answers to your questions, visit [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp).