

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 a general administrative office, financial office, or a non-diagnostic medical office¹ categorized as Office or Financial Office² property types. 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:



Your Property’s Buildings

How many physical buildings do you consider part of your property?

- 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](#))

How many?

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 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 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?

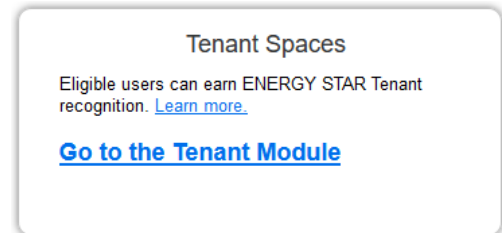
- My property’s energy consumption includes [parking areas](#)
- My property has a [Data Center](#) that requires a constant power load of 75 kW or more
- My property has one or more retail stores ([that are eligible for a Retail score](#))
- My property has one or more restaurants/cafeterias

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.³ 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 going forward.

Office and Financial Office spaces that are entered into Portfolio Manager as "part of a building" will see the following link in the lower left corner of the property's Summary tab:



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.

3 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](#).

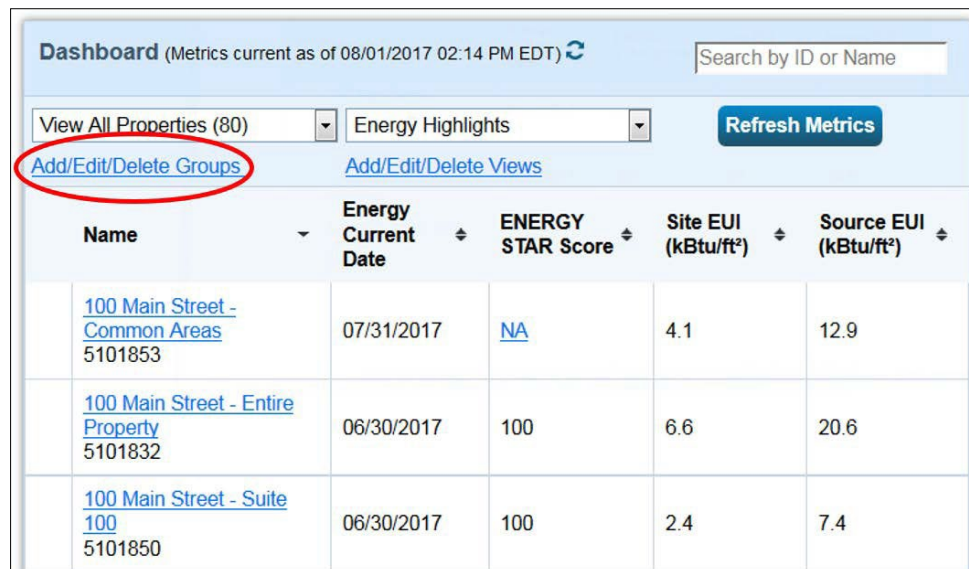
³To be eligible for Tenant Space recognition, your tenant space must have energy meters in place, but you will not need to submit actual energy data to EPA at this time. EPA recommends that you set up meters and begin tracking your energy, water, and waste data to measure performance and gauge improvements.

4 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.



The screenshot shows the Portfolio Manager Dashboard interface. At the top, it displays 'Dashboard (Metrics current as of 08/01/2017 02:14 PM EDT)' and a search bar labeled 'Search by ID or Name'. Below this, there are two dropdown menus: 'View All Properties (80)' and 'Energy Highlights', along with a 'Refresh Metrics' button. The 'Add/Edit/Delete Groups' link is circled in red. Below the navigation area is a table with the following columns: Name, Energy Current Date, ENERGY STAR Score, Site EUI (kBtu/ft²), and Source EUI (kBtu/ft²). The table contains three rows of data:

| Name | Energy Current Date | ENERGY STAR Score | Site EUI (kBtu/ft²) | Source EUI (kBtu/ft²) |
|--|---------------------|-------------------|---------------------|-----------------------|
| 100 Main Street - Common Areas 5101853 | 07/31/2017 | NA | 4.1 | 12.9 |
| 100 Main Street - Entire Property 5101832 | 06/30/2017 | 100 | 6.6 | 20.6 |
| 100 Main Street - Suite 100 5101850 | 06/30/2017 | 100 | 2.4 | 7.4 |

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.”

Dashboard (Metrics current as of 08/01/2017 02:14 PM EDT) ↻

Tenant Spaces (5) ➔ Energy Highlights Refresh Metrics

View All Properties (80)
 Properties not in a Group (31)
 My Properties (72)
 Other People's Properties (8)
 Base (15)
 Demo Group (6)
 DESIGN (7)
 Design Training (3)
 FEDERAL (4)
 HUD Fellow Group (6)
 Region 1 (2)
Tenant Spaces (5)

[Add/Edit/Delete Views](#)

| Report Date | ENERGY STAR Score | Site EUI (kBtu/ft ²) | Source EUI (kBtu/ft ²) |
|-------------|-------------------|----------------------------------|------------------------------------|
| 08/31/2016 | 86 | 46.0 | 127.1 |
| 08/31/2015 | NA | 54.6 | 137.4 |
| 08/31/2016 | 100 | 29.9 | 42.7 |
| 08/31/2016 | NA | 37.6 | 117.1 |
| 08/31/2016 | 15 | 374.1 | 723.3 |

100 Main Street - Suite 300 3165393
 100 Main Street - Suite 400 3643511
 100 Main Street - Whole Building 3398574

First Previous Page 1 of 1 Next Last 100 View 1 - 80 of 5

5 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.

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?

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

Templates & Reports (9) Create a New Template

| Name | Status | Action |
|------------------------|---------------------|-----------------------------|
| Performance Highlights | No Report Generated | I want to... ▼ |
| Energy Performance | No Report Generated | I want to... ▼ |

From here, you can define your custom reporting template.

Create a Report Template

Report templates provide you with an easy way to regularly access information and metrics. You can regularly prepare reports or graphs using Excel. You can also use your custom report template to collect data from other Portfolio Manager users. You can even share templates that you create with other people who may have similar needs with their properties.

1 Name Your Template

Name: * Tenant Performance Report
Please provide a unique name for this template

2 Select Timeframe

Timeframe: * Current Energy Year

Each property must have 12 full months of data for metrics to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report. Pick the **last day** of the 12 month period that you want.

3 Select Properties

Properties: * Properties in a Group

4 Select Information & Metrics

Information & Metrics: * Select Information & Metrics

Save Template Cancel

Tip
As you create and save your templates, they will appear in the Templates & Reports section of the Reporting tab. Keeping the names unique will make it easier for you to find and use your templates.

Tip
If you are planning to use your report template to request information from other people, you only need to select the timeframe and information/metrics. When the people respond to your request, they will select the properties to include.

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](#).”

Learn More!

To learn more about Portfolio Manager, visit www.energystar.gov/portfoliomanager.

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