



Building Performance with ENERGY STAR®: Benchmarking with Portfolio Manager for the State of Washington

U.S. Environmental Protection Agency (EPA)

February 17, 2010



Learn more at energystar.gov

Agenda



- Introduction and Key Information
- Strategies for Large Portfolios
- Portfolio Manager – Live Demo
 - Changing Building Names
 - Sharing with Master Accounts
- Additional Tools for Large Portfolios
 - Import Templates
 - Multiple Facility Meter Updates
 - Campuses with Shared Meters
 - Campus Steam and Chilled Water

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Washington State Department of General Administration



➤ <http://www.ga.wa.gov/energy/EnergyStar.htm>

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STATE OF WASHINGTON

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Projects

Forms & reference documents

Last update: 01/27/2010

Energy Star Portfolio Manager

By July 1, 2010, Washington state agencies, colleges and universities will benchmark their buildings using the EPA Energy Star Portfolio Manager. Links to training, and other resources, will be maintained on this webpage. A link to the results will be posted here, when the benchmarking is complete.

Portfolio Manager

- Portfolio Manager Overview and Account Login
- RCW 19.27A.190 - Qualifying public agency duties - Energy benchmark
- RCW 19.27A.140 Definitions
- Step-by-Step Instructions for State Agencies, Colleges and Universities
- Frequently Asked Questions

Training and Information:

- Sign up for the February 17th training session
- Energy Star Online Training Sessions
- State of Washington Portfolio Manager Training Sessions:
 - » February 17, 2010
 - » August 17, 2009
 - » August 3, 2009

In the near future, information on Energy Audit Guidance, the Affected Agencies Committee and a Frequently Asked Questions document will be made available.

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Department of Ecology
<http://www.ecy.wa.gov/ecyhome.html>



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Benefits of Benchmarking Large Portfolios



- Compare building performance against similar properties in your portfolio
- View trends over time, both internally and against national averages
- Assess greatest strengths and areas for improvement in order to prioritize projects
- Develop the most appropriate targets based on aggregate data

Successful Large Portfolio Efforts



- Ohio
 - Benchmarked 5,800 state buildings
 - Helped K-12 sector benchmark 500 buildings
 - Ohio Board of Regents helped benchmark 65 campuses

- Utah
 - Benchmarked approximately 1000 state buildings

- New York City
 - Benchmarked over 1600 buildings so far

Steps for Benchmarking Large Portfolios



- Planning
- Training
- Data Collection
- Benchmarking
- Verification and Monitoring

Planning



- **Hold a Kick-off Meeting** and invite your energy and facility managers, EPA, and your utility providers. Discuss ways to streamline process. Determine:
 - Points of contact for your organization.
 - Agency Leads have been assigned. See the list at <http://www.ga.wa.gov/energy/ListOfAgenciesAndContactsForPortfolioManager.pdf>
 - Number of Portfolio Manager accounts to be opened.
 - Personnel from each division who will manage these accounts.
 - Number of buildings to be entered into Portfolio Manager.
- **Standardize Usernames & Passwords** to allow administrators access to different accounts for quality assurance or for sharing purposes.

Planning



- **Agree on a Data Entry Method** for transmitting energy or water consumption data to Portfolio Manager:
 - *Manual Data Entry* – enter building and energy use data manually.
 - *Bulk Data Upload* – upload large sets of building data using an import template (10 or more buildings).
 - *Automated Benchmarking Services (ABS)* – have your Energy Service Provider or utility automatically send your data into your Portfolio Manager account.

Training



- **Conduct Training** using the following sites:
 - <http://www.ga.wa.gov/energy/EnergyStar.htm>
 - www.energystar.gov/buildingstraining
- ENERGY STAR Overview / Portfolio Manager Overview
- Portfolio Manager detailed training (train-the-trainer session). At minimum, the these topics should be included:
 - Benchmarking Starter Kit
 - Four steps of benchmarking
 - How to construct bulk data “[import templates](#)” to save time
 - Sharing buildings with Master Accounts
 - Portfolio Manager’s other features and Questions & Answers section
- Homework for account managers—encourage all account managers to view a training session and benchmark at least one building.
- For more information, visit www.energystar.gov/benchmark

Data Collection



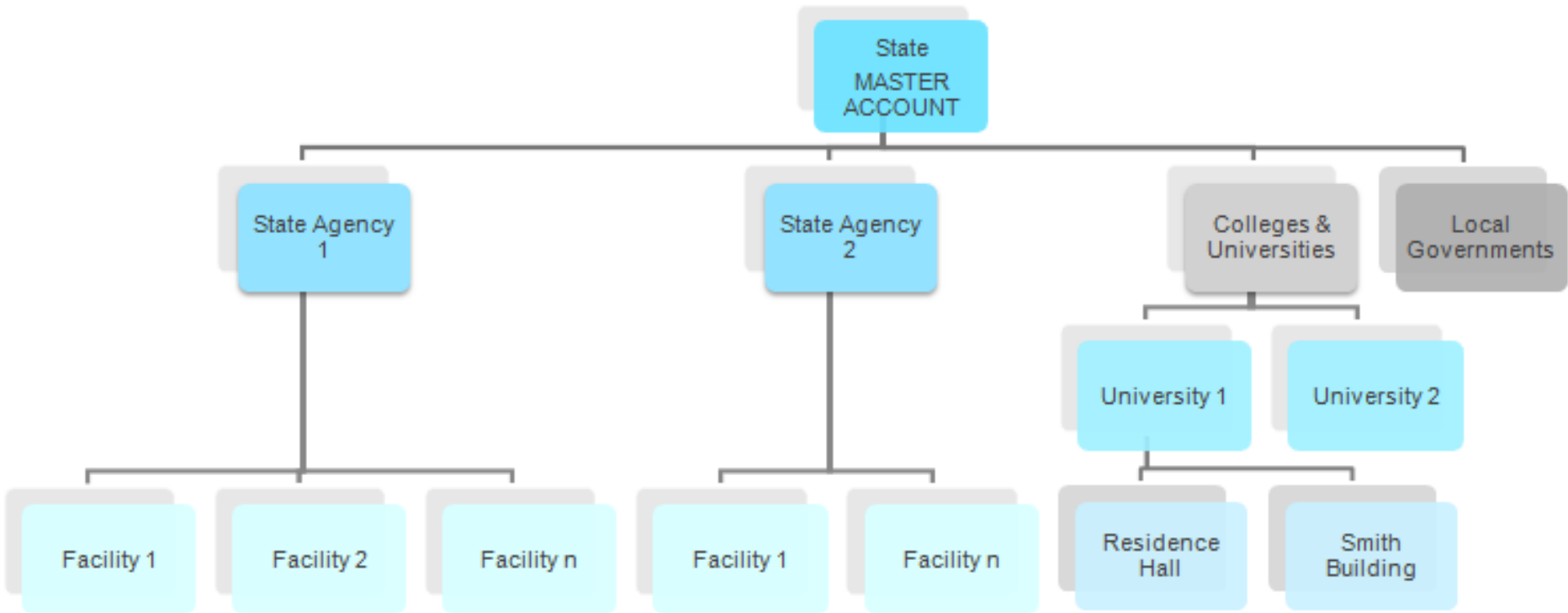
- **Gather Building Data:**
 - Building/plant address.
 - Building space characteristics.
 - Energy use (determine baseline and current period and metrics).
 - Other variables, such as water use or other space data such as server rooms or parking spaces.
- **Collect Building Attribute Data** such as space types, square footage, and number of people and computers. Store this bulk data in import templates. Space attributes will depend on the building type.

Benchmarking



- **Create Accounts** for your users (Portfolio Manager Accounts and Master Accounts).
- **Enter Buildings** into Portfolio Manager using the collected data.
- **Create & Assign Meters** in Portfolio Manager.
- **Share Access with Master Accounts** to allow all buildings across your portfolio to be viewed and tracked.
- **Input Energy and Water Data**, and access useful metrics such as EUI and GHG.

Master Accounts: Large Portfolio Management



Verification and Monitoring



- **Conduct Additional Training** once the benchmarking process begins.
 - Perform ongoing data quality assurance.
 - Use the Multi-facility Meter Update feature.
 - Create reports to track progress toward goals.
- **Track Progress & Celebrate Achievements**
 - Identify agencies or buildings that have improved their energy efficiency over time and recognize their achievements.
 - Encourage continuous progress toward meeting and exceeding your energy and water reduction goals.

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Live Demo



Portfolio Manager

➤ <https://www.energystar.gov/benchmark/>



Returning from live demo



- Returning from live demo

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Live Demo



Portfolio Manager

➤ <https://www.energystar.gov/benchmark/>



Returning from live demo



- Returning from live demo
- Find step-by-step screenshots on the following slides

Downloading Import Templates



(1) Click the [Import Facility Data](#) link, and on the next screen, right click on the desired template link. Select “Save Target As,” and follow the instructions.

PORTFOLIO MANAGER
EPA's system for helping you track and improve energy efficiency across your entire portfolio of buildings.

FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP

WHAT'S NEW IN PORTFOLIO MANAGER

Water Treatment and Distribution Facilities
The EPA is pleased to announce the addition of Water Treatment and Distribution Facilities to Portfolio Manager. Water Utilities will now be able to track and improve energy consumption and emissions by entering and managing data in Portfolio Manager. [Learn More](#)

Portfolio Manager Enhancements (Spaces Not Eligible to Receive a Rating)
Portfolio Manager now provides users the ability to manage buildings that are eligible to receive a rating as well as those that are not – all within the same online platform. [Learn More](#)


Username:
[Forgot your username?](#)

Password:
[Forgot Your Password?](#)

New User? [Register](#)

ENERGY STAR Labeled Buildings





Ada County Courthouse & Administration Bldg
200 W Front Street
Boise, ID 83702
[Read Profile](#)

About Portfolio Manager

- [Learn](#) what Portfolio Manager can do for your organization
- [Take](#) the Portfolio Manager Tour
- [Explore](#) some Frequently Asked Questions about our October 1, 2007 Updates
- [Train](#) on how to use Portfolio Manager
- [Review](#) eligibility requirements to benchmark your facility
- [Import](#) facility data

Success through ENERGY STAR

- [Learn](#) about ENERGY STAR Leaders that have improved organization-wide
- [Take](#) the ENERGY STAR Challenge – improve your buildings' energy efficiency by 10%
- [Find](#) buildings that have earned the ENERGY STAR

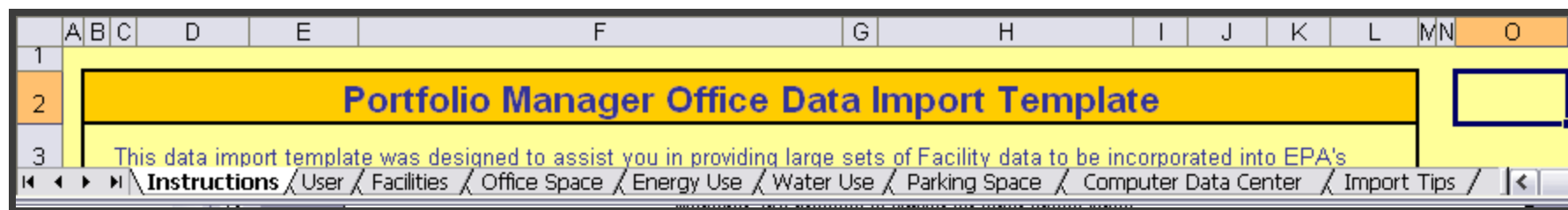
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Import Template Overview



Be sure to populate the User, Facilities, Primary Space, and Energy Use tabs with the required data. Additional tabs are included for instructions and secondary space types (if any).

NOTE: The following is an example of how to use the import template. While this example shows you how to import data for an office space (general or courthouse) into the Portfolio Manager, the process is similar for other space types.



In the User tab, enter your login name, indicate user contact information, and respond to optional questions for EPA tracking purposes.

Use the Facilities, Space, Energy Use, and Water Use tabs to fill in the required data.

For additional space types, fill in fields for Parking Space, Data Center Space, and Swimming Pool (if available).

Read the Instructions and Import Tips tabs for information on the import process and data requirements.



To import the data into Portfolio Manager, e-mail the completed template to buildings@energystar.gov

Populating and Importing Data from Import Template



Populate data fields with basic **facility** information

	A	B	C	D	E	F	G	H	I	J	K	L
1	Facility Name	Street Address	City	State	County	ZIP Code	Year Built	Property Type	Country	Nearest City	Select the Nearest City (required for non-US facilities)	
2	Sample Office 1	123 Sample Drive	Fairfax	VA	Fairfax	22031	1995	A single facility with more than 90% ownership/management	United States			
3	Sample Office 2	567 Sample Drive	Fairfax	VA	Fairfax	22031	2001	A single facility with less than 90% ownership/management	United States			

Space Use information

	A	B	C	D	E	F	G	H
1	Facility Name	Space Name	Gross Floor Area	Weekly Operating Hours	Workers on Main Shift	Number Of PCs	Percent Heated	Percent Air-Conditioned
2	Sample Office 1	Space 1	56000	65	123	112	50% or more	50% or more
3	Sample Office 2	Space 2	150000	60	500	510	Less than 50%	Less than 50%
4							Not Heated	Not Air Conditioned
5							50% or more	
6							Less than 50%	
7							Not Heated	

Populating and Importing Data from Import Template



Energy Use data needed in Portfolio Manager (Energy Use tab)

	A	B	C	D	E	F	G	H
1	Facility Name	Energy Meter ID	Energy Type	Energy Unit	Start Date	End Date	Energy Consumption	Energy Cost
2	Sample Office 1	E223-455	Electricity	h	2/1/2001	2/28/2001	83489	3520
3	Sample Office 1	E223-455	Electricity	h	1/1/2001	1/31/2001	83826	3580
4	Sample Office 1	E223-455	Fuel Oil (No. 1)	h	12/1/2000	12/31/2000	83456	3485
5	Sample Office 1	E223-455	Fuel Oil (No. 2)	h	11/1/2000	11/30/2000	83623	3259
6	Sample Office 1	E223-455	Fuel Oil (No. 4)	h	10/1/2000	10/31/2000	83518	3325
7	Sample Office 1	E223-455	Fuel Oil (No. 5 and No. 6)	h	9/1/2000	9/30/2000	83794	3450
8	Sample Office 1	E223-455	Kerosene	h	8/1/2000	8/31/2000	83725	3440
9	Sample Office 1	E223-455	Propane	h	7/1/2000	7/31/2000	83676	3250
10	Sample Office 1	E223-455	Liquid Propane	kWh	6/1/2000	6/30/2000	80942	3350

Data Quality Assurance Process

- Critical step in maximizing accuracy
- Improves analysis and decision making
- Includes checking for the following:
 - Gaps in utility bills
 - Overlapping dates
 - Double-billing
 - Consistency in building names

	A	B	C	D
1	Facility Name	Energy Meter ID	Energy Type	Energy
2	Sample Office 1	E223-455	Electricity	h
3	Sample Office 1	E223-455	Electricity	h
4	Sample Office 1	E223-455	Fuel Oil (No. 1)	h
5	Sample Office 1	E223-455	Fuel Oil (No. 2)	h
6	Sample Office 1	E223-455	Fuel Oil (No. 4)	h
7	Sample Office 1	E223-455	Fuel Oil (No. 5 and No. 6)	h
8	Sample Office 1	E223-455	Kerosene	h
9	Sample Office 1	E223-455	Propane	h
10	Sample Office 1	E223-455	Liquid Propane	h
11	Sample Office 1	E223-455	Electricity	kWh
12	Sample Office 1	E223-455	Electricity	kWh

Multi Facility Meter Update



Once you have established an account and benchmarked your buildings, you should update energy data on a regular basis.

(1) Click “Update Multiple Meters” on the “My Portfolio” page.

The screenshot shows the Energy Star Portfolio Manager interface. At the top, there is a navigation bar with the Energy Star logo and the text "PORTFOLIO MANAGER". To the right of the logo are several icons and links: "ACCOUNT INFORMATION", "CONTACTS", "FAQ FREQUENTLY ASKED QUESTIONS", "CONTACT US", "HELP", and "LOGOUT". Below the navigation bar, the breadcrumb "Home > My Portfolio" is visible. The main content area is divided into two columns. The left column contains a table with the following data:

Portfolio Averages	
Baseline Rating: 100 Facilities Included: 1	Current Rating: 100 Facilities Included: 2
Portfolio Adjusted Percent Energy Reduction: 0% Facilities Included: 1	
Averages are weighted by Total Floor Space. More about Baselines More about Adjusted Percent Energy Reduction	

The right column contains a list of navigation options: "Add a Property", "Work with Facilities" (with sub-links for "Import Facility Data Using Templates", "Update Multiple Meters", "Share Facilities", and "Request Energy Performance Report"), and "Apply for Recognition" (with sub-links for "Apply for the ENERGY STAR ENERGY STAR Leaders"). A large "(1)" is overlaid on the "Update Multiple Meters" link.

Multi Facility Meter Update (Continued)



- (1) Click on “Select Meter Entries.”
- (2) On next screen (not shown), select the number of entries (billing cycles or months) you would like to input; click “continue.”



[Home](#) > [My Portfolio](#) > Step 1: Multi Facility Meter Update

Multi Facility Meter Update

Multi Facility Meter Update allows you to update meter data for many facilities at one time in **three easy steps**. To use this tool to update your meter data, please review the steps below. Please note that Multi Facility Meter Update is used to update your meter data; it will not overwrite or replace meter data that already exists in Portfolio Manager.

STEP 1: Select Meter Entries and Facilities

To begin using Multi Facility Meter Update, you will first select the number of meter entries and facilities for which you wish to update meter data. Once selected, you will generate and download a spreadsheet to be used to enter meter data. Once the meter data has been entered into the spreadsheet, return to Multi Facility Meter Update by selecting the Update Meters link on the My Portfolio page to continue with Step 2.

(1)

[Select Meter Entries](#)

[Return to My Portfolio](#)

Multi Facility Meter Update (Continued)



(3) Click on buildings needing change

(4) Click “Generate Spreadsheet”

Select Facilities to Update Meter Data GROUP: All Facilities

Results 1 - 29 of 29 CANCEL GENERATE SPREADSHEET

Meters for downloaded facilities will be locked

Select All	Facility Name	Address	Entries (billing cycles)	Meter Name	Energy Type	Last Meter Entry (End Date)
<input type="checkbox"/>	Camp Perry Campus 1	xx Ohio Street Columbus, OH 22209	12	11470111-001-000-3*4083175	Natural Gas (ccf)	10/31/2006
<input type="checkbox"/>	CATHLAMET STP	390 2nd Street Cathlamet, WA 98612	12	E1	Electricity (kWh)	12/31/2006
<input type="checkbox"/>	City of Blaine STP	9235 SEMIAHMOO PKWY Blaine, WA 98230	12	EM7	Electricity (kWh)	12/31/2006
<input type="checkbox"/>	Student Union	123 Main St Bowling Green, OH 43402	12	9817394719837	Electricity (kWh)	12/31/2004
<input type="checkbox"/>	Westlake building	501 Westlake Blvd. Houston, TX 77079	12	Electric Combined	Electricity (kWh)	12/31/2006
			12	Gas Combined	Natural Gas (MBtu)	12/31/2006

Results 1 - 29 of 29 CANCEL GENERATE SPREADSHEET

Meters for downloaded facilities will be locked

(4)

Multi Facility Meter Update (Continued)



(1) When finished, click “Done” or Download Spreadsheet.

A navigation bar for the Portfolio Manager interface. It includes the Energy Star logo, the text "PORTFOLIO MANAGER", and several icons with labels: a person icon for "ACCOUNT INFORMATION", a group of people icon for "CONTACTS", a question mark icon for "FAQ FREQUENTLY ASKED QUESTIONS", a telephone icon for "CONTACT US", a question mark icon for "HELP", and a close icon for "LOGOUT".

[Home](#) > [My Portfolio](#) > [Multi Facility Meter Update](#) > [Download Spreadsheet](#)

Download Spreadsheet

Download Spreadsheet

The spreadsheet was generated successfully. Select [Download Spreadsheet](#) to download the spreadsheet to your computer. Complete the spreadsheet and upload the spreadsheet by selecting the [Update Meters](#) link on the [My Portfolio](#) page and following the instructions. Select [Done](#) to return the [My Portfolio](#) page.

If, after reviewing the spreadsheet, you wish to cancel this current download, select the [Update Meters](#) link from the [My Portfolio](#) page, and then select [Cancel Current Download](#).

NOTE: Meters for downloaded facilities are now locked. During this time you will be unable to add a new meter or add or edit meter entries for these facilities. Meters will be unlocked when either the download is canceled or the meter data is uploaded and successfully processed.

(1)

[DOWNLOAD SPREADSHEET](#)

[DONE](#)

Multi Facility Meter Update (Continued)



(2) Enter energy use and cost data in the downloaded spreadsheet.

B	C	D	E	F	G	H
Facility Name (Do Not Alter)	Meter Name (Do Not Alter)	Energy Type (Units) (Do Not Alter)	Start Date (mm/dd/yyyy)	End Date (mm/dd/yyyy)	Energy Use	Cost - US Dollars (optional)
Sample Facility	Sample Meter	Electricity (kWh (thousand Watt-hours))	1/1/2006	1/31/2006	1423	205
Sample Facility	Sample Meter	Electricity (kWh (thousand Watt-hours))	2/1/2006	2/28/2006	1520	230
Sample Facility	Sample Meter	Electricity (kWh (thousand Watt-hours))	3/1/2006	3/31/2006	1516	221
Sample Facility	Sample Meter	Electricity (kWh (thousand Watt-hours))	4/1/2006	4/30/2006	(2)	

Uploading your Multi Facility Meter Update



(1) Click “Upload Facilities.”

The screenshot shows the Portfolio Manager interface. At the top, there is a navigation bar with the Energy Star logo and the text "PORTFOLIO MANAGER". To the right of the logo are several icons and labels: "ACCOUNT INFORMATION", "CONTACTS", "CONTACT US", "HELP", and "LOGOUT". Below the navigation bar, there is a breadcrumb trail: "Home > My Portfolio > Step 2: Multi Facility Meter Update". The main heading is "Multi Facility Meter Update". The text below explains that this tool allows updating meter data for many facilities at once in three easy steps. It provides instructions for Step 1 (Select Meter Entries and Facilities) and Step 2 (Upload Spreadsheet). Step 1 involves selecting the number of meter entries and facilities, generating a spreadsheet, and returning to the update page. Step 2 involves uploading the spreadsheet after entering the meter data. There are links for "Upload Facilities", "Cancel Current Download", and "Download Spreadsheet". A note states that if "Cancel Current Download" is selected, the current spreadsheet cannot be uploaded and a new one must be generated. At the bottom, there is a link for "Return to My Portfolio" and the heading for Step 3: Processing of Spreadsheet, which notes that processing takes one business day and an email will be received upon completion.

Multi Facility Meter Update

Multi Facility Meter Update allows you to update meter data for many facilities at one time in **three easy steps**. To use this tool to update your meter data, please review the steps below. Please note that Multi Facility Meter Update is used to update your meter data; it will not overwrite or replace meter data that already exists in Portfolio Manager.

STEP 1: Select Meter Entries and Facilities
To begin using Multi Facility Meter Update, you will first select the number of meter entries and facilities for which you wish to update meter data. Once selected, you will generate and download a spreadsheet to be used to enter meter data. Once the meter data has been entered into the spreadsheet, return to Multi Facility Meter Update by selecting the Update Meters link on the My Portfolio page to continue with Step 2.

STEP 2: Upload Spreadsheet
Once you have entered the meter data into the spreadsheet for the facilities you selected, you will then upload the spreadsheet to Portfolio Manager.

You last generated a spreadsheet on 03/30/2006. To upload these facilities to Portfolio Manager, select Upload Facilities below. If you wish to cancel your current download, select Cancel Current Download. To download the spreadsheet again, select Download Spreadsheet.

Note: If you select Cancel Current Download, you will not be able to upload your current spreadsheet. You must generate and download a new spreadsheet to be uploaded.

(1) [Upload Facilities](#)
[Cancel Current Download](#)
[Download Spreadsheet](#)

[Return to My Portfolio](#)

STEP 3: Processing of Spreadsheet
Processing takes one business day from the date the meter data was submitted to Portfolio Manager. You will receive an e-mail once processing is complete.

Uploading your Multi Facility Meter Update



- (2) You may browse your computer to find the correct file name for your completed update spreadsheet.
- (3) Click “Upload.” Your data will be processed and a confirmation e-mail will be sent to you regarding your upload.
- (4) Click “Confirm” (not shown) to continue



[Home](#) > [My Portfolio](#) > [Multi Facility Meter Update](#) > **Upload Facilities**

Upload Facilities

To upload the facilities for which you have updated meter data, select Browse below and navigate to the spreadsheet. When finished, select Upload.

If you wish to cancel the upload process, select Cancel.

A screenshot of the "Upload Facilities" form. The form has a dark blue header with the title "Upload Facilities". Below the header, it says "Upload your Excel spreadsheet to update your energy meter data." There is a text input field followed by a "Browse..." button. At the bottom of the form, there are three buttons: "CANCEL", "CLEAR", and "UPLOAD".

(2)

(3)

Portfolio Manager's Campus Feature



- Provides a central view of all campus facilities
- Calculates combined energy usage based on combined floor space
- Energy usage can be derived from both campus-level meters (used by multiple facilities) and separate meters for individual facilities

Process for Creating Campuses



- Open an account
- Add a property
(individual buildings, campus, etc.)
- Add space types
- Add utility meters
- Create a campus
- Add meter associations

Creating a Campus- Add a Property



PORTFOLIO MANAGER



ACCOUNT INFORMATION



CONTACTS



Frequently Asked Questions



CONTACT US



HELP



LOGOUT

[Home](#) > My Portfolio

Portfolio Averages

Baseline Rating: 40

Facilities Included: 6

Current Rating: 14

Facilities Included: 7

Portfolio Adjusted Percent Energy Reduction: No Reduction

Facilities Included: 9

Averages are weighted by Total Floor Space.

[More about Baselines](#)

[More about Adjusted Percent Energy Reduction](#)

Portfolio Averages

(for all Water Utilities and Wastewater Treatment Facilities)

Baseline Rating: 61

Facilities Included: 5

Current Rating: 61

Facilities Included: 5

Portfolio Adjusted Percent Energy Reduction: No Reduction

Facilities Included: 5

Averages are weighted by Average Daily Flow.

[More about Wastewater](#)

My Facilities

My Campuses

GROUP: All Facilities

[Create Group](#) | [View](#)

All

VIEW: NADA VIEW

[Create View](#) | [Edit View](#) |

[View All](#)

[Download](#) in Excel

Results 1 - 31 of 31

Search Facility Name:

Search

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

[Add a Property](#)

Work with Facilities

[Import](#) Facility Data Using Templates

[Update](#) Multiple Meters

[Share](#) Facilities

[Request](#) Energy Performance Report

Apply for Recognition

[Apply](#) for the ENERGY STAR

[ENERGY STAR Leaders](#)

Creating a Campus-Property Type



PORTFOLIO MANAGER



ACCOUNT INFORMATION



CONTACTS



FREQUENTLY ASKED QUESTIONS



CONTACT US



HELP



LOGOUT

[Home](#) > [My Portfolio](#) > Add a Property

Add a Property

Property Type

What kind of property would you like to add?

- A single facility for which my organization owns or manages 90% or more of the floor area.
- A portion of a single facility for which my organization owns or manages less than 90% of the floor area.
- A hospital composed of a single facility or collection of facilities.
- A municipal wastewater treatment plant or water treatment and distribution utility
- A campus or other collection of multiple facilities at the same geographic location. [What is this?](#)

CANCEL

CONTINUE

Creating a Campus- General Campus Information



PORTFOLIO MANAGER



ACCOUNT
INFORMATION



CONTACTS



FREQUENTLY
ASKED
QUESTIONS

[Home](#) > [My Portfolio](#) > Add A Campus

Add General Campus Information

Use the form below to provide general information concerning your campus.

*REQUIRED

*Campus Type: [what is this?](#)

*Country:

*Name:

*Address:

*City:

*State:

*Zip Code:

CANCEL

CONTINUE

Creating a Campus- Add Campus Facilities



PORTFOLIO MANAGER



ACCOUNT INFORMATION



CONTACTS



FREQUENTLY ASKED QUESTIONS



CONTACT US



HELP



LOGOUT

[Home](#) > [My Portfolio](#) > [Campus Test](#) > **Add Campus Facilities**

Add Campus Facilities: Campus Test

Select Facilities

From the list of available facilities below, please select all facilities that will be added to this campus. (Note: Facilities that are part of another campus are not eligible.)

[Add New Facility](#)

Select all Facilities that are part of your campus:					
<input type="checkbox"/>	Date Facility Became Part of Campus	Facility Name	Address	Total Floor Space (Sq. Ft.)	Building Type
<input type="checkbox"/>		1234 building	1234 road bethesda, MD 20817	0	
<input type="checkbox"/>		363 Test	123 Main St. Taipei ,	100100	Office
<input type="checkbox"/>		Arkansas Test	1234 Main Street Little Rock, AR 72201	110000	Office



Creating a Campus- Add Meter Associations



Add Campus Facilities: Little Rock Campus

Add Meter Associations

You have indicated that the following facilities should be added to the campus. Please indicate:

- 1) Which Campus-level meters (if any) each new facility should be associated with, and
- 2) Which Facility-level meters (if any) should be added to the Campus total.

Add Facility Meters To Campus Totals		
Facility Name	Facility Meters	Add To Campus Total?
Arkansas County Office Test	Electric1	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
	Gas1	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
Arkansas Test	09876-05	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
	GBD45209	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
	Indoor	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
	Outdoor	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
	Outdoor/Indoor	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No
	Wastewater	<input type="radio"/> Yes, add to campus total <input checked="" type="radio"/> No

CANCEL SAVE

Creating a Campus-View Campus Facilities



PORTFOLIO MANAGER

[ACCOUNT INFORMATION](#) [CONTACTS](#) [FAQ](#) [FREQUENTLY ASKED QUESTIONS](#) [CONTACT US](#) [HELP](#) [LOGOUT](#)

[Home](#) > [My Portfolio](#) > Little Rock Campus

Campus Summary: Little Rock Campus

[How do I use this page?](#)

Campus ID: 15340
Level of Access: Building Data Administrator

Electric Distribution Utility: Entergy Arkansas Inc
Regional Power Grid: [SERC Mississippi Valley](#)
[Select my Power Generation Plant](#) to calculate my emissions rate
Electric CO₂ Emissions Rate (lbs/MWh): 1135.463 ([what is this?](#))

General Information Edit
Campus Type: Other
1234 Market St Little Rock, AR 72201
Change from Baseline: Campus Adjusted Energy Use (%): N/A

Campus Performance Set Baseline Period							
Select View: <input type="text" value="Sample CEP"/> Create View Edit View							
12 Months Ending	Baseline Rating (1-100)	Current Rating (1-100)	Baseline Site Electric Use (kWh)	Baseline Total Site Energy Use (kBtu)	Change from Baseline: Adjusted Energy Use (%)	Current Total GHG Emissions (MtCO ₂ e)	Change from Baseline: GHG Emissions (MtCO ₂ e)
<input type="text" value="Select Date"/>	i	i	i	i	i		i

Campus Energy Meters Add Meter View All Meter Data in Excel			
Meter Name	Energy Type	Last Meter Entry (End Date)	Alerts
No Meters Defined			

Campus Water Meters Add Meter View All Meter Data in Excel				
Meter Name	Units	Use	Last Meter Entry (End Date)	Alerts
No Meters Defined				

- General Campus Administration**
- [View Campus Facilities](#)
- [Add Campus Facilities](#)
- [Remove Campus Facilities](#)
- [Delete Campus](#)
- [Contact Us](#)

- ### Sharing Data
- [Share](#) this campus with another user
 - [Modify](#) user permissions
 - [Transfer](#) this campus to another user

Creating a Campus – View Your Campuses



PORTFOLIO MANAGER

- ACCOUNT INFORMATION
- CONTACTS
- FAQ
- FREQUENTLY ASKED QUESTIONS
- CONTACT US
- HELP
- LOGOUT

[Home](#) > My Portfolio

Change from Baseline: Portfolio Adjusted Percent Energy Use (%) (for All Campuses):

N/A

Averages are weighted by Total Floor Space.
[More about Campuses](#)
[More about Adjusted Percent Energy Reduction](#)

- [Add](#) a Property
- [Import](#) Facility Data Using Templates

Work with Facilities

- [Update](#) Multiple Meters
- [Share](#) Facilities

Reporting and Analysis

- New! [Generate](#) Reports and Graphs
- [Request](#) Energy Performance Report
- [Federal Sustainability Report](#)

Apply for Recognition

- [Apply](#) for the ENERGY STAR
- [ENERGY STAR Leaders](#)

Automated Benchmarking

- [Get Started Now](#)

My Facilities

My Campuses

VIEW: Sample CEP [Create View](#) | [Edit View](#) | [View All](#)

[Download](#) in Excel

Search Campus Name:

Results 1 to 18 of 18

All # [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Campus Name	Baseline Rating (1-100)	Current Rating (1-100)	Baseline Site Electric Use (kWh)	Baseline Total Site Energy Use (kBtu)	Change from Baseline: Adjusted Energy Use (%)	Current Total GHG Emissions (MtCO ₂ e)	Change from Baseline: GHG Emissions (MtCO ₂ e)
<input checked="" type="checkbox"/>	<small>i</small>	<small>i</small>	<small>i</small>	<small>i</small>	<small>i</small>	<small>i</small>	<small>i</small>
ADJ	N/A	N/A	967,525.3	3,301,196.2		819.01	0.00
Andrea Putman	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Arkansas Campus Test	N/A	N/A	N/A	N/A	N/A	N/A	N/A

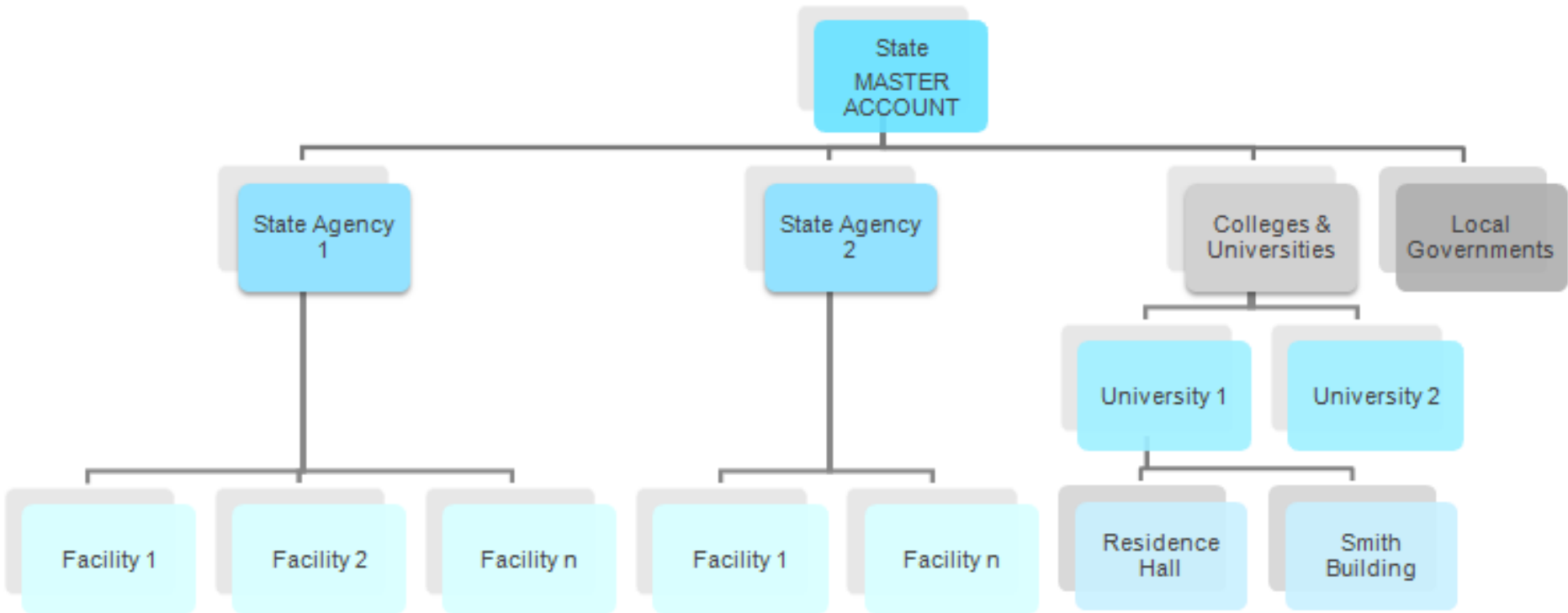


Tracking Campaigns: Master Accounts



- Allows your organization to measure and track energy and water use and monitor performance metrics including greenhouse gas emissions by building type or sector, for example:
 - School buildings
 - Small businesses
 - Commercial real estate
 - Local government buildings
- **Process:**
 - Institution creates a Master Account
 - Master Account appears in a public registry
 - Individual users can share facilities with Master Account
 - Master Account holder can view progress for all facilities that have been shared

Master Accounts: Large Portfolio Management



Creating a Master Account

The Master Accounts feature allows master users to track progress of their constituents, such as local governments, state agencies, and school districts

- (1) Designate a Master Account or click on “[Account Information](#)” in the “My Profile” view
- (2) or, Click Share Facilities to create a Master Account

(1)

[Home](#) > [My Portfolio](#)

Group Averages	
Baseline Rating: 100 Facilities Included: 1	Current Rating: 100 Facilities Included: 2
Group Adjusted Percent Energy Reduction: 0% Facilities Included: 1	
Averages are weighted by Total Floor Space. More about Baselines More about Adjusted Percent Energy Reduction	

[Add a Property](#)

Work with Facilities

[Import](#) Facility Data Using Templates

[Update](#) Multiple Meters

[Share](#) Facilities

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[ENERGY STAR Leaders](#)

(2)

GROUP: [East Campus Cluster](#) [Create Group](#) | [Edit Group](#) | [View All](#) VIEW: [General](#) [Create View](#) | [Edit View](#) | [View All](#)

[Download](#) in Excel Search Facility Name:

Results 1 - 3 of 3 All # [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Facility Name <input type="checkbox"/>	Current Rating (1-100)	Current Site Electric Use (kWh (thousand Watt-hours))	Current Site Energy Intensity (kBtu/Sq. Ft.)	National Average Site EUI (kBtu/Sq. Ft.)	CO2 Reduced (pounds)	Number of Occupants	Total Floor Space (Sq. Ft.)
Best Building	100	86,000.0	2.1	62.7	0.00	0	141,000
Charles Building	100	106,050.0	3.6	71.8	0.00	0	100,000
Sample Facility	N/A	189,100.0	38.0	77.0	0.00	0	17,000

[Download](#) in Excel Search Facility Name:

Results 1 - 3 of 3 All # [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Sharing Facilities: Allowing Access by a Master Account

[Home](#) > [My Portfolio](#)

Portfolio Averages	
Baseline Rating: 100 Facilities Included: 1	Current Rating: 100 Facilities Included: 2
Portfolio Adjusted Percent Energy Reduction: 0% Facilities Included: 1	
Averages are weighted by Total Floor Space. More about Baselines More about Adjusted Percent Energy Reduction	

- [Add](#) a Property
- (1)** **Work with Facilities**
[Import](#) Facility Data Using Templates
[Update](#) Multiple Meters
[Share](#) Facilities
[Request](#) Energy Performance Report
- Apply for Recognition**
[Apply](#) for the ENERGY STAR
[ENERGY STAR Leaders](#)

Sharing a facility allows a Master Account access to your data. You can provide choose the level of access provided to the Master Account

[Home](#) > [My Portfolio](#) > [Share Facilities \(Step 1\)](#)

Select User or Master Account

Users with whom you share facilities will now be able to see your name and e-mail address on their Facility Summary page for that shared facility. In addition, users will also have the option to select your name and email address to appear in their custom views. Select Cancel if you do not wish to share any facilities.

Portfolio Manager provides the ability to share multiple facilities from your account with other users of the system in a single transaction. Users with whom access is being shared or removed MUST have a Portfolio Manager user account. To share facilities, select a Portfolio Manger user in Step 1.

If you are only removing access to facilities in your account, select "Remove this User's Access" in Step 1 after selecting a user from the Current Access List or enter a username in the textbox. You will then be able to select all of the facilities from which you want to remove this user's access.

STEP 1: Select the account to which you want to grant access, modify existing access or remove access rights.

Portfolio Manager User:

Enter Portfolio Manager Username: **(2)**

- OR -

Select a Portfolio Manager Master Account: [Learn more](#) about Master Accounts

- OR -

Energy Service Provider: [Learn more](#) about Energy Service Provider

(3)

- (1) In My Portfolio, click on "Share Facilities"
- (2) Type in Portfolio Manager User Name
- or
- (2) Select a Portfolio Manager Master Account from the drop down menu
- (3) Click "Add and Modify"



Sharing Facilities: Allowing Access by a Master Account (Continued)

- (1) Select the Access Role that you would like to give to the Master Account
- (2) Select the optional rights that you would like to give to the Master Account
- (3) Specify the group from the Master Account to place the shared facility(ies)
- (4) Click "Continue"



[Home](#) > [My Portfolio](#) > Share Facilities (Steps 2 and 3)

Select Access Rights for Donna Albert - WA State Department of General Administration

(1)

STEP 2: Select the set of Access Rights you want to provide this User.

Access Role	Access Rights
<input type="radio"/> Facility/Profile Editor	(1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; (4) Create/Edit a Building Profile
<input type="radio"/> Facility Editor	1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; May NOT create/edit a Building Profile
<input type="radio"/> Profile Editor	1) Create/Edit a Building Profile; May NOT edit any other data for this facility, generate a Statement of Energy Performance or submit an ENERGY STAR Building Application
<input type="radio"/> Read Only	Read Access only; May NOT edit any data for this facility, generate a Statement of Energy Performance, submit an ENERGY STAR Building Application or create/edit a Building Profile

(2)

Optional Rights (rights that are added to the selected access role)

Can this user set a baseline for the shared facilities? Yes No
(Note: There is only one baseline date per facility.)

Can this user provide access to the shared facilities with other users? Yes No
(Note: A user cannot delegate any access role greater than their own. See table above. All users who are given this right will be able to assign this right to other users.)

Can this user delete the shared facilities from your account? Yes No
(Note: This right is reserved only for Facility/Profile Editors or Facility Editors.)

(3)

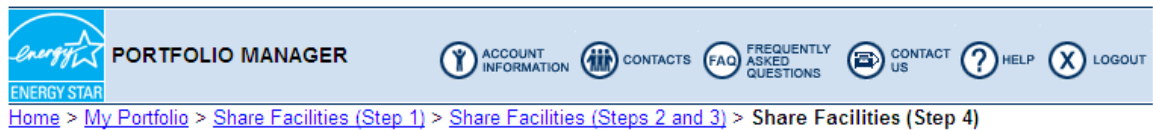
STEP 3: Specify the group from this user's account to place the shared facility(ies). [Learn more](#) about sharing into groups.

(4)



Sharing Facilities: Allowing Access by a Master Account (Continued)

- (1) Select the facilities that you would like to share with the Master Account by checking the boxes next to the facilities you would like to share or check the “select all” box to share all facilities
- (2) Click “Continue” (not shown)
- (3) On the next screen, verify that all access changes are correct. If they are not, click cancel to return to the previous screen. If they are correct, click “Save” (not shown)



Select Access Rights for Donna Albert - WA State Department of General Administration

Select all facilities for which you would like to provide this user with access. To remove access, uncheck the checkbox next to that facility. Note: you will only be able to share facilities that you currently have access to share.

The access role and rights you selected in Step 2 are:

Access Role: **Portfolio Manager General User**
 Able to Set Baseline? **No**
 Able to Delegate Access? **No**
 Able to Delete Facility? **No**
 Accessible to User through: **Main Portfolio**

The "Current Access Level" columns allow you to see whether this user has already been provided access to this facility by you or another user. If you choose to change the access role here, your selection will replace the current access role.

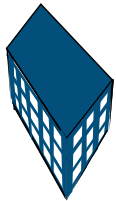
If the access role or optional rights for a particular facility listed below in the "New Access Level" columns do not match those listed above, you do not have access to share that facility at the level you have chosen in Step 2. You can either choose to select the recommended access role/rights listed in the "New Access Level" columns below or provide a different level of access to that user at a later date.

(1)

STEP 4: Select all facilities in your account that you would like to share with Donna Albert.					
Select Facilities to Share (uncheck to Remove Access)	Facility Name	Current Access Level		New Access Level	
		Access Role (provided by)	Optional Rights	Access Role	Optional Rights
<input type="checkbox"/> select all					
<input type="checkbox"/>	Gabby ES	None	None	Portfolio Manager General User	Set Baseline? No Delegate? No Delete? No

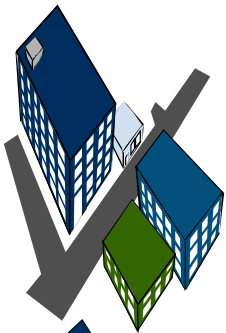


How to Access Portfolio Manager



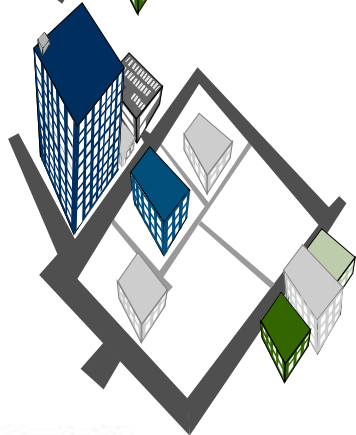
- **Single Building Manual Entry**

- Enter building and energy consumption information into Portfolio Manager.



- **Bulk Data Upload**

- Upload large sets of building data in Portfolio Manager using an Excel template.



- **Automated Benchmarking Services**

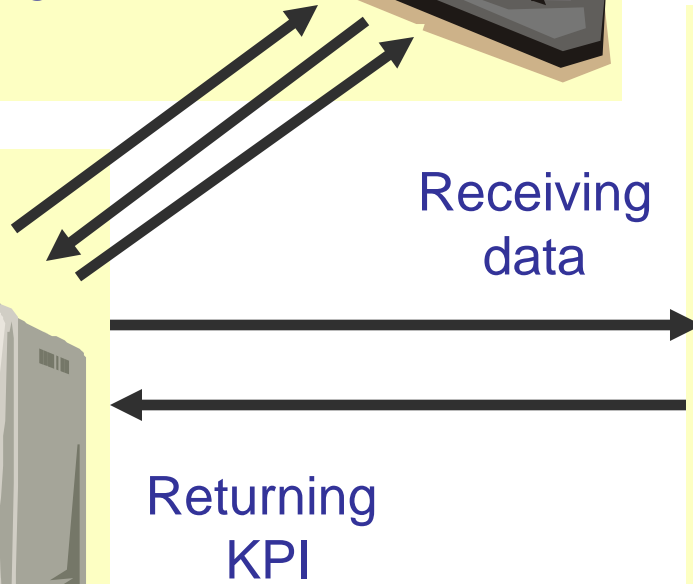
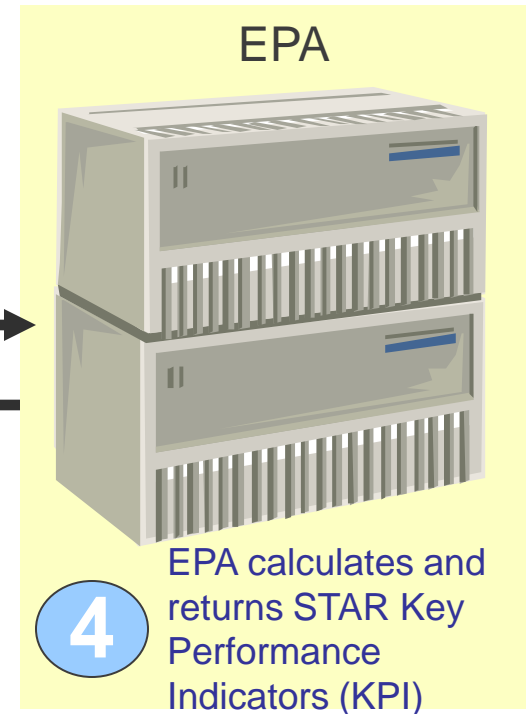
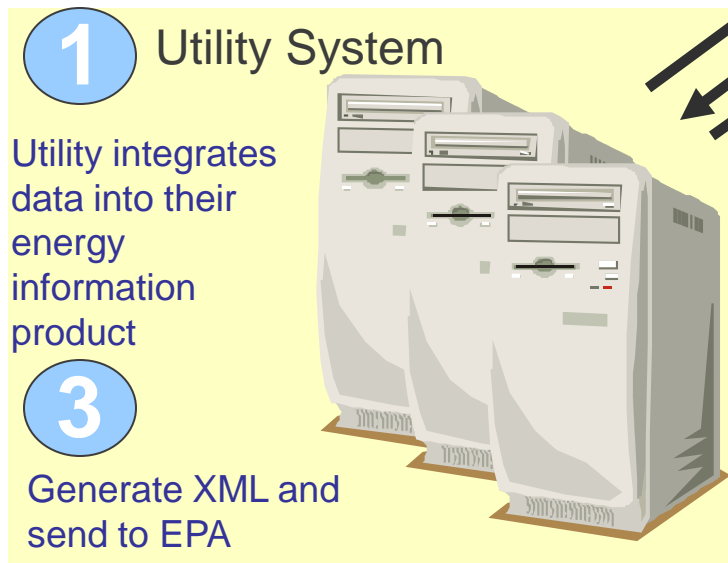
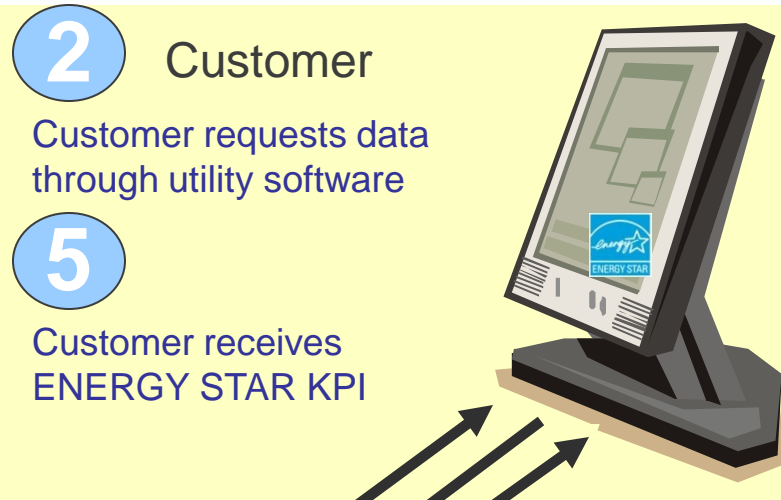
- Use Service and Product Provider to have the rating automatically integrated into your energy information and bill handling system
- Utility-based Automated Benchmarking
 - Option 1: Provide utility data
 - Option 2: Provide automated benchmarking services

Automated Benchmarking System (ABS)



- This service allows customers to automatically receive monthly Portfolio Manager data in the same web-based interface that customers view other energy and building information.
- Web services using Extensible Markup Language (XML) to transfer data
- Third parties can use web services to manage, export, and report Portfolio Manager data.
- EPA has experience integrating with utilities, energy software and bill payment companies, regional efficiency programs, and large multi-site organizations.
- www.energystar.gov/abs

How Does a Utility Automate Benchmarking?



ABS Resources



- Overview on ENERGY STAR [web site](#)
- Register for [ABS account](#)
- Download ABS Overview and Users Guide from ABS account Web site
- Email technical question to buildings@energystar.gov
- Request conference calls with EPA program and technical support teams

Create Views



- A view is a set of columns that display various data in a table, which can be downloaded into MS Excel.
- Portfolio Manager allows users to customize views by selecting up to seven columns.
- Users can also select the number of facilities that can display on the My Portfolio page.
- There are over 70 different data columns that can be selected.

Process for Creating Views

- Highly Customizable
- Add up to seven columns per view
- No limit to the number of views created

1. Click “Create View”
2. Select number of facilities to include.
3. Choose data columns.

VIEW: ASE Test Create View | Edit View | View All

Search

I J K L M N O P Q R S T U V W X Y Z

Total Energy Use (kBtu)	Baseline: (tCO2e)	Change from Baseline: Adjusted Energy Use (%)
		N/A
		N/A
		-10.8
		11.6
		22.9
		-7.2
\$0.10	38.95	16.2



NEW!

Generate Reports and Graphs

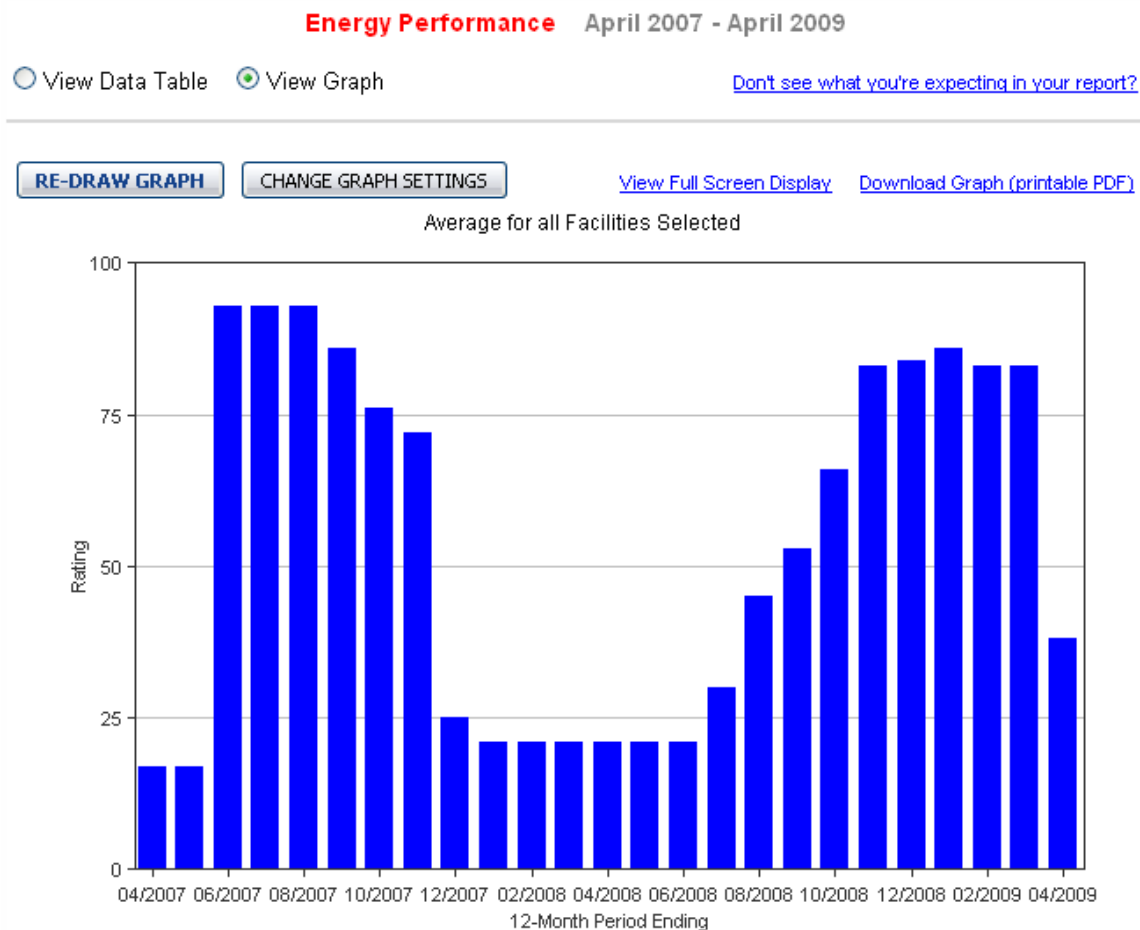
- Eight pre-defined report templates
- Filter by reporting period, facilities and groups, location, and facility type
- Tabular and graphical display outputs
- Export data in a variety of formats
 - MS Excel, XML, CSV, or PDF

Generate Reports and Graphs



- Easy-to-use reporting tool
- Three simple steps

1. Click “Generate Reports and Graphs”
2. Choose a report template
3. Define search criteria and hit REFRESH



Agenda



- Introduction and Key Information
- Strategies for Large Portfolios
- Portfolio Manager – Live Demo
 - Changing Building Names
 - Sharing with Master Accounts
- Additional Tools for Large Portfolios
 - Import Templates
 - Multiple Facility Meter Updates
 - Campuses with Shared Meters
 - Campus Steam and Chilled Water

Washington State Department of General Administration



➤ <http://www.ga.wa.gov/energy/EnergyStar.htm>

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Topic index | Search:

Information for contractors

Information for architect, engineer & facility consultants

Facility maintenance

Planning & design services

Commission a building

Conserve energy

Green building & LEED

Manage construction waste

Plan a barrier free facility

Projects

Forms & reference documents

Last update: 01/27/2010

Energy Star Portfolio Manager

By July 1, 2010, Washington state agencies, colleges and universities will benchmark their buildings using the EPA Energy Star Portfolio Manager. Links to training, and other resources, will be maintained on this webpage. A link to the results will be posted here, when the benchmarking is complete.

Portfolio Manager

Portfolio Manager Overview and Account Login

RCW 19.27A.190 - Qualifying public agency duties - Energy benchmark

RCW 19.27A.140 Definitions

Step-by-Step Instructions for State Agencies, Colleges and Universities

Frequently Asked Questions

Training and Information:

Sign up for the February 17th training session

Energy Star Online Training Sessions

State of Washington Portfolio Manager Training Sessions:

- » February 17, 2010
- » August 17, 2009
- » August 3, 2009

In the near future, information on Energy Audit Guidance, the Affected Agencies Committee and a Frequently Asked Questions document will be made available.

For more information contact:

Department of General Administration
Energy Program

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Washington State University

Extension Energy Program

<http://www.energy.wsu.edu/>

Department of Ecology

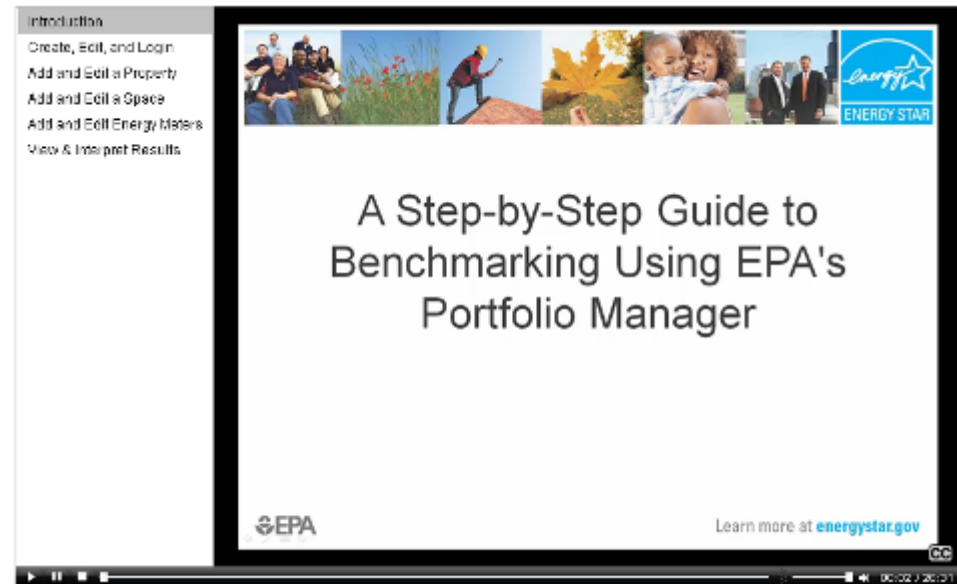
<http://www.ecy.wa.gov/ecyhome.html>



User Support is Available!



- **Benchmarking Starter Kit**
 - Animated Portfolio Manager training
 - Data Collection Worksheet
 - Step-by-step Quick Reference Guide



Available at www.energystar.gov/benchmark

User Support is Available!



- Contact the help line – email technical questions to: buildings@energystar.gov
- Register for regular live PM webinars and pre-recorded trainings at www.energystar.gov/businesstraining

Session Information: Office Buildings: Rating Energy Performance with EPA's Portfolio Manager

The session is open for registration.

English · New York Time

Session status: Not Started ([Registration](#))

Session date: Thursday, February 4, 2010

Starting time: 12:00 pm, Eastern Standard Time (New York)

Duration: 2 hours

Presenters: Dr. Sharon L. Levin

Description: In this training, you will learn how EPA's Portfolio Manager can help you evaluate the energy performance of office buildings you own, manage, or hold for investment. This training will cover creating a user account, identifying data requirements, managing and sharing information, and establishing an energy performance rating. The rating serves as a benchmark to compare the energy performance of your office building against similar ones across the nation. From a portfolio perspective, energy performance ratings provide valuable information for making decisions regarding investments in energy efficiency, developing energy management plans, and measuring improvement over time.

Who should participate: Property managers, energy managers, engineers, and organizational leaders interested in learning about energy performance benchmarking.

Join Session Now

You cannot join the training session now because it has not started.

Registration ID:

Session password:

[Join Now](#)

*Please see your registration confirmation for the registration ID and session password. If you lost your registration ID, [click here](#) to have it sent to you again.

For More Information



Visit www.energystar.gov/government

E-mail buildings@energystar.gov

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