



ENERGY STAR®

PORTFOLIO MANAGER® REFERENCE GUIDE

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Prepared by the Center for Sustainable Energy for the San Diego Regional Energy Partnership

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This is a project of the San Diego Regional Climate Collaborative. More information on the Climate Collaborative can be found at sdclimatecollaborative.org. The San Diego Regional Climate Collaborative program is partially funded by California utility customers and administered by San Diego Gas & Electric Company (SDG&E®) under the auspices of the California Public Utilities Commission. Trademarks are property of their respective owners.

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BENCHMARKING WITH PORTFOLIO MANAGER



Why Should You Use Portfolio Manager?

It is a Best Practice

Some 40 percent of U.S. commercial building space is already entered into Portfolio Manager – making it the industry-leading tool for managing and reporting building performance. When you add your buildings, you will be joining more than half of the Fortune 100®, half of the nation's largest healthcare organizations, major league sports teams, colleges and universities and cities using Portfolio Manager.

It Will Be Required

Currently, the California Energy Commission is creating a statewide benchmarking and transparency program mandated by Assembly Bill 802 (AB 802), signed into law in 2015. The program will require owners of commercial, mixed-use and multifamily buildings larger than 50,000 square feet to report benchmarking metrics publicly on an annual basis using ENERGY STAR Portfolio Manager.

AB 802 also requires California utilities to provide aggregated whole-building energy usage information to building owners upon request starting January 1, 2017, subject to certain thresholds set by the number of active utility accounts in commercial and multifamily properties.

Access Portfolio Manager by visiting portfoliomanager.energystar.gov

For questions regarding Portfolio Manager, please email benchmarking@energycenter.org.

Introduction to Portfolio Manager

The ENERGY STAR® program was established by the Environmental Protection Agency (EPA) in 1992. ENERGY STAR helps identify and promote energy efficiency products and buildings. Through labeling and standards, it additionally helps reduce energy consumption, improve energy security and reduce pollution.

EPA's ENERGY STAR building measurement and tracking tool, Portfolio Manager®, is a free, online, secure resource for all types of properties. Portfolio Manager is both a management tool and a metrics calculator. As a management tool, it can be used to evaluate whole building energy and water consumption, assess waste and materials management, track changes over time, track green power purchases, share and report data with others, create reports or apply for ENERGY STAR certification.

As a metrics calculator, Portfolio Manager will help organize and inform your energy management strategy. Reports will easily generate energy and water consumption figures, waste and materials management figures, greenhouse gas emissions and your property's ENERGY STAR score. Any type of building can use the tool to generate an energy use intensity value – or energy use per square foot value annualized for the most recent 12 months of data input to the tool. By tracking your energy use, you can identify underperforming buildings, set investment priorities and track improvements. Other popular metrics include weather-normalized energy consumption values, greenhouse gas emissions metrics and the ENERGY STAR 1-100 score.

It is important to note that ALL buildings can use Portfolio Manager – regardless of the type and no matter whether or not they can earn the 1-100 ENERGY STAR score. Even in the absence of a 1-100 score, you can compare your buildings to the national median, or to your own set of buildings, in order to set targets and goals. With limited resources and capital, you need to be strategic in focusing your resources in order to achieve the greatest benefits from energy efficiency projects. Benchmarking can help you understand which of your buildings can deliver the largest savings and where you should focus your efforts as your energy management activities get underway.

Benchmarking Coach Program

Need Help Benchmarking Your Building?

The Center for Sustainable Energy, on behalf of the San Diego Regional Energy Partnership, **provides no-cost, one-on-one technical support** to building owners and operators in San Diego County.

Our **Benchmarking Coaches** help you

| | | |
|-------------------------------|------------------------------|--|
| Create an account | Add properties and buildings | Create meters and add data |
| Set up automated benchmarking | Share your information | Generate reports on your property's data |

Contact a Benchmarking Coach to get started!


Email benchmarking@energycenter.org

or call (858) 244-4849

Benchmarking Coaching

- No-cost technical support for benchmarking in ENERGY STAR Portfolio Manager
- For owners and operators of commercial, multifamily and public buildings in San Diego County

Did You Know?

 The average commercial building wastes 30 percent of the energy it consumes. If you haven't done anything to save energy, chances are you'll find many opportunities to improve.

Buildings that consistently benchmark reduce energy use an average of 2.4 percent per year.

Testimonials

"The phone support worked great in answering all my questions."

"The Benchmarking Coach was terrific. She met with us several times, answered all our questions and helped us set up everything so we can now benchmark our buildings."

"The Benchmarking Coach knew what she was talking about. She gave me different report templates I could create to tailor my property and make any necessary changes."

"The Benchmarking Coach went above and beyond to help me out with benchmarking! She always followed up in an extremely timely manner and was both kind and professional on the phone!"

The Benchmarking Coach program is a project of the San Diego Regional Climate Collaborative, which is partially funded by California utility customers and administered by San Diego Gas & Electric Company (SDG&E®) under the auspices of the California Public Utilities Commission. Trademarks are property of their respective owners.



Key Steps

1. Creating a Portfolio Manager Account
2. Adding a Property
3. Entering Energy and Water Consumption Data
4. Sharing Your Property and Meters with SDG&E

Using Portfolio Manager

1) Creating a Portfolio Manager Account

Before you can get started using Portfolio Manager, you need to create an account. Follow these steps to begin.

1. Open your browser of choice and type in the URL:
portfoliomanager.energystar.gov
2. Click **PORTFOLIO MANAGER LOGIN** ①.
 - At the bottom of the pop-up box, you will see a place to register as a new user. Click **REGISTER** ②.

The screenshot shows the Energy Star website with the following elements:

- Header: ABOUT ENERGY STAR | PARTNER RESOURCES | Search bar
- Navigation: Home > Buildings & Plants > Owners and managers > Existing buildings > Use Portfolio Manager
- Main Content:
 - ENERGY EFFICIENT products
 - ENERGY SAVINGS at home
 - ENERGY EFFICIENT new homes
 - ENERGY STRATEGIES FOR buildings & plants
- Secondary Navigation: partner | about us | press room | help desk | **portfolio manager login** (1)
- Account Management: Owners and managers, Service providers, Program administrators, Tenants, Tools and Resources
- Existing buildings: Commercial new construction, Industrial energy management, Small business, Congregations
- Left Sidebar:
 - IN THIS SECTION
 - Learn the benefits
 - Get started
 - Use Portfolio Manager
 - How Portfolio Manager helps you save
 - The benchmarking starter kit
 - Identify your property type
 - Enter data into Portfolio Manager
 - Get help accessing your utility data
- Center Content:
 - ENERGY STAR Portfolio Manager logo
 - The most-used energy measurement and tracking tool for commercial buildings.
 - Use Portfolio Manager
 - You've heard it before: you can't manage what you don't measure. That's why EPA created ENERGY STAR Portfolio Manager®, an online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions. Use it to benchmark the performance of one building or a whole portfolio of buildings, all in a secure online environment.
- Right Side Pop-up:
 - Login to your account
 - Username:
 - forgot username?
 - Password:
 - forgot password?
 - Login
 - New user? Register (2)
 - EPA's NATIONAL BUILDING COMPETITION
 - AND THE WINNER IS...
 - Discover the new and improved Portfolio Manager

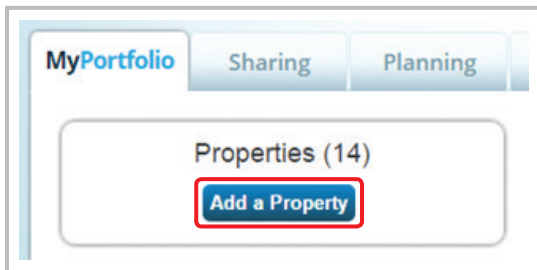
3. Enter the information requested in the form.
 - On the right-hand side, you will see exclamation points and informational notes to guide you as you enter information throughout Portfolio Manager.
4. Be sure to mark the following:
 - For "Reporting Units," be sure to leave the "Conventional EPA units" button selected.

- If you do not know if your organization is an ENERGY STAR partner, leave the “No” button selected.
 - For “Searchability in Portfolio Manager,” choose “Yes.”
5. Once you have entered all your information, click **CREATE MY ACCOUNT** to finish the process.
- You will go to the **MYPORFOLIO** tab and a congratulations message will appear in a green box at the top of the page.

2) Adding a Property

To get started, log in to Portfolio Manager at portfoliomanager.energystar.gov. Then, follow these instructions to create a property and to enter property information. If you have already added your properties to your Portfolio Manager account, proceed to the next step.

1. Click **ADD A PROPERTY** on the **MYPORFOLIO** tab.



2. Select your property type. For additional information, please see Appendix A. Property Types in Portfolio Manager.
3. Choose the number of physical buildings on your property.
- If your property consists of a single building, choose the button next to “One.”
 - If you have multiple buildings as part of your property, choose the button next to “More than One” and enter your total number of buildings.
For example, you might choose “More than One” if you have two physical buildings OR if you are a marina and want to break out your dock square footage and energy usage.
4. For “Your Property’s Construction Status,” choose “Existing.”
5. Once you have entered all of this information for your property, click **GET STARTED**.



Helpful Data to Have On Hand

You don’t need very much information to begin benchmarking a property. However, it is helpful to have the following information on hand:

- 1. Property Information**
Primary function, name, address, year built
- 2. Property Data**
Gross floor area and use details (operating hours, computers, workers)
- 3. Energy Bills**
Invoices from all purchased and on-site generated energy (most recent 12 months)
- 4. Water Bills**
Invoices from all water meters on-site (most recent 12 months)



Properties with Multiple Use Types

Some properties include multiple use types, such as restaurants in hotels, salons in senior care communities and cafeterias in hospitals. Generally, if a certain use commonly occurs in the type of property being benchmarked, do not break it out as a separate property use type. Simply include its square footage with the building’s primary use.

See Appendix A. Property Types in Portfolio Manager for more information.

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!



Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

[Learn more about Property Types.](#)



To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).



Your Property's Buildings

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?



Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.



Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

- Existing:** My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
- Design Project:** My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
- Test Property:** This is not a real property. I am entering it to test features, or for other purposes such as training.



Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

Get Started!

[Cancel](#)

PROPERTY TYPES IN PORTFOLIO MANAGER

Choosing a Property Type

Portfolio Manager contains more than 80 **Property Types** to choose from when setting up your property, in order to best identify the primary use of your property.

The **Property Type** indicates the single, primary use of your property. You select the type with which you most closely identify, and you can change it at any time (on the Details tab, under Basic Information).

Multi-Use Buildings

In general, EPA recommends you enter as few property uses as possible. For example, say you have an office with a restaurant, a health club and a dry cleaner. EPA recommends that you enter one property use (office) and include the gross floor area (GFA) and energy of the restaurant, health club and dry cleaner within the office property use. **This would mean you would only enter office as your Property Type when setting up the property on the first “Add a Property” page.** You would also include the property use details (number of workers, computers, etc.) from the restaurant, health club and dry cleaner with the office property use on the **“Set-up a Property: How is it Used?”** page.

There are four exceptions to this rule when you should create an additional property use:

- If it is a property use that can get an ENERGY STAR score (see Applying for ENERGY STAR certification).
- If it accounts for more than 25% of the property’s GFA.
- If it is a vacant/unoccupied office or medical office (and the vacancy is greater than 10% of the GFA).
- If 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%).

If you need to add an additional property use when initially setting up a property, on the “Set-Up a Property: How is it Used?” page, choose the drop-down to add another use.

If you’ve already set up your property, you can add another property use by going to the property’s **Details** tab. Go to the “Add Another Type of Use” drop-down in the upper right corner. Pick the new property use and click “Add.” You can then add the necessary use details. Finally, make sure you adjust any other property uses, if needed, to ensure your total gross floor area remains consistent.

Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

Basic Information

| | | | |
|------------------------------|-------------------|-----------------|---|
| Name: | Test Property 123 | Country: | US |
| Property Type: | Office | Address: | 123 Main Street San Diego, CA 92101 Map It |
| Year Built: | 1970 | | |
| Property consists of: | 1 building | | |

[Edit](#)

Add Another Type of Use

[Add](#)

Common Property Types

A variety of property types exist in San Diego, from small retail stores to large industrial facilities. The list below highlights some common types.

- Food Sales
- Food Service
- Hotel
- Manufacturing/Industrial
- Museum
- Non-Refrigerated Warehouse
- Office
- Other
- Refrigerated Warehouse
- Restaurant
- Retail Store
- Strip Mall
- Transportation/Terminal Station (docks)

A full list of all property types, including descriptions and associated property use details, can be found here: energystar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details.

Set Up a Property: Basic Property Information

1. About Your Property

Enter your basic property information, including the physical address, year built, gross floor area and occupancy details.

- If you are unsure of your building's gross floor area, you can check the "Temporary Value" check box to indicate that you are not sure of the data and to flag it for later review.
- For occupancy, you will typically enter 100%. However, in some cases, your building may not have 100% occupancy. For example, if you have a ten-story building, but only nine floors are leased, then your property would be 90% occupied.

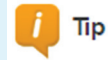
2. Do Any of These Apply?

Answer the additional questions shown on the bottom of the page.

- These questions differ based on your property's primary function and will help guide Portfolio Manager in asking additional questions on subsequent pages in order to describe your property accurately.
- NOTE: You should not include parking area in the gross square footage for your property. If the parking area uses energy (e.g., lighting) and is not separately metered, then select "my property's energy consumption includes parking areas" and you will enter more information on a subsequent screen. Once you have entered all information, click **CONTINUE**.



Tips & Tricks



Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

Throughout Portfolio Manager, you will see tips, like the one above, to help guide your data entry. You can look up definitions for key terms listed in blue by hovering over the term. If you need further explanation, you can click the link, and it will bring you to the full definition in the EPA glossary.

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name:

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

[Year Built](#):

Gross Floor Area: Temporary Value

Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not including parking. [Details on what to include.](#)

[Occupancy](#): %

Tip

The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.



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
- My property has one or more restaurants/cafeterias

Tip

Answering these simple questions will help us guide you in entering your property correctly.



Back

Continue

Cancel

Set Up a Property: How is it Used?

- On the next page, you will enter specific use details for your property, such as gross floor area, operating hours and number of workers for each type of use.
 - If you are unsure of what to put for these property use details, you can check the box next to “use a default,” which will generate a default number for that property use based on your square footage and property use type.
- The next column allows you to enter the “current as of” date for each property use. This feature is useful if you want to track the changes in your property use over time.
 - By default, it will enter January 1 of the year the building was built.
- The last column allows you to mark a temporary value for any values you might be unsure of. You can come back and edit those later.
- Once you have added all of your use details for your property, click **ADD PROPERTY**.
- You will see a congratulations message in the top area of your screen in a green box and the screen shows you a “property level” view. On the **SUMMARY** tab, you will see boxes to show if you have any notifications regarding your property and a summary of key metrics.

[More on this rule.](#)

| Property Use Detail | Value | Current As Of | Temporary Value |
|-----------------------------------|--|---|--------------------------|
| ★ Gross Floor Area | 200,000 <input type="text"/> Sq. Ft. <input type="button" value="▼"/> | 1/1/1970 <input type="button" value="📅"/> | <input type="checkbox"/> |
| ★ Weekly Operating Hours | 60 <input type="text"/> <input type="checkbox"/> Use a default | 1/1/1970 <input type="button" value="📅"/> | <input type="checkbox"/> |
| ★ Number of Workers on Main Shift | 1000 <input type="text"/> <input type="checkbox"/> Use a default | 1/1/1970 <input type="button" value="📅"/> | <input type="checkbox"/> |
| ★ Number of Computers | 1000 <input type="text"/> <input type="checkbox"/> Use a default | 1/1/1970 <input type="button" value="📅"/> | <input type="checkbox"/> |
| ★ Percent That Can Be Heated | 50 % or more <input type="button" value="▼"/> <input type="checkbox"/> Use a default | 1/1/1970 <input type="button" value="📅"/> | <input type="checkbox"/> |
| ★ Percent That Can Be Cooled | 50 % or more <input type="button" value="▼"/> <input type="checkbox"/> Use a default | 1/1/1970 <input type="button" value="📅"/> | <input type="checkbox"/> |

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

- To view, input or edit property information, use the **DETAILS** tab.
 - Here, you will see basic property information, as well as information about your property's use, the option to add additional use types to the property and a drop-down box that allows you to make edits and updates to this information.

i **Tips & Tricks**

! Energy

! Water

After you've added your property, you will see exclamation points next to the **ENERGY** and **WATER** tabs. This is because you have not entered any meter data yet for energy or water. Portfolio Manager uses such warning symbols to let you know when it thinks your property has missing or incomplete data.

3) Entering Energy and Water Consumption Data

Once you have created your property in Portfolio Manager, you will want to enter your property's energy and water consumption data. To get started, log in to Portfolio Manager at portfoliomanager.energystar.gov. Then, follow these instructions.

Setting Up Meters

- Click on your property from the **MYPORTFOLIO** tab; then, select either the **ENERGY** or **WATER** tab.
- Click **ADD A METER** on the right-hand side of the page.
- Select the type of energy or water used.
 - In most cases, for energy, you will mark "electricity" and possibly "natural gas."

The screenshot shows the Portfolio Manager interface for a property named "Test Property 1". The address is "123 Main Street, San Diego, CA 92101" and the Portfolio Manager Property ID is "4998569". The "Year Built" is "1970". There are tabs for "Summary", "Details", "Energy", "Water", "Goals", and "Design". The "Energy" tab is selected and highlighted with a red box. In the top right, there is a "Weather-Normalized Source EUI (kBtu/ft²)" section showing "Current EUI: N/A" and "Baseline EUI: N/A". Below the tabs, there is a "Meter Summary" section stating "0 Energy Meters Total" and an "Add A Meter" link. To the right, the "Meters - Used to Compute Metrics (0)" section is highlighted with a red box. It contains a message: "There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. Enter information about your energy meters to begin tracking energy usage. After entering the meter, you will need to choose to include it in your metrics." Below this message is a link to "How to get Utility Data into Portfolio Manager" and an "Add A Meter" button, which is also highlighted with a red box.

- Choose “Mixed Indoor/Outdoor” for your water meter if you only have one meter that captures both your indoor and outdoor water consumption.
4. For each type of energy or water meter selected, enter the number of meters to create.
 5. Click **GET STARTED!**

About Your Meters

1. Click on a meter to edit its details.
2. Change the meter name.
 - If this is an energy meter, change the name to the meter number as shown on your SDG&E bills (Eight numbers, including leading zeros). This is essential in order to use SDG&E’s automatic data upload web service.
 - For water meters, you can choose how you want to name your meter. Be sure to name your meters in a way to distinguish which meter is which (if you have more than one) for when you manually update your monthly water bills.
3. Choose the following standard units based on your meter and units used on your utility bills.

Standard units are as follows:

| | |
|--------------------|--------------------------|
| Electric | kWh (1,000 watt-hours) |
| Natural gas | therms |
| Water | ccf (hundred cubic feet) |

4. Mark the date the meter became active for all meters (both active and inactive).
 - If you are entering a currently active meter, leave the “In-Use?” check box checked and the last column blank (this is the most likely scenario).
 - If you are entering an inactive meter, uncheck the “In-Use?” check box and enter the date the meter became inactive in the last column.
5. If this meter reflects a bulk fuel purchase for an energy meter, select the “Enter as Delivery?” check box (e.g., propane tanks delivered to your property). This does not apply for water meters.
6. Repeat these steps for each meter you created; then, click **CREATE METERS.**


About Your Meters for Test Property 1

Enter the information below about your new meters. The meter's **Units** and **Date Meter became Active** are required. You can also change the meter's name.

1 Energy Meter for Test Property 1 (click table to edit)

| <input type="checkbox"/> | Meter Name | Type | Other Type | Units | Date Meter became Active | In Use? | Date Meter became Inactive | Enter as Delivery? |
|--------------------------|------------|-----------------|------------|---------------------------|--------------------------|-------------------------------------|----------------------------|--------------------------|
| <input type="checkbox"/> | 01234567 | Electric - Grid | | kWh (thousand Watt-hours) | 01/01/2014 | <input checked="" type="checkbox"/> | | <input type="checkbox"/> |

 [Delete Selected Entries](#)

 [Add Another Entry](#)

[Back](#)

[Create Meters](#)

[Cancel](#)



Entering Meter Data

There are three main ways to enter meter data:

1. Manually
2. Uploading a spreadsheet
3. Connecting with SDG&E
(Preferred; energy meters only)

Add Meter Entries

Click the gray arrow next to each meter to expand the section on the Your Meter Entries page. Following are the three ways you can add your meter data.

Option 1. Add Meter Entries Manually

1. Click **ADD ANOTHER ENTRY** under the meter.
2. Using your utility bills, enter the start and end dates of your bills, the total usage information and cost (not required).
3. If you are unsure of the values on the bill, you can check the "Estimation" box to flag the entry for later review.
4. The final column, "Green Power," allows you to identify that some of your meter's energy is from purchased off-site green power (such as wind or solar); green power generated on-site should be tracked in a separate meter.
5. To delete an entry, click the check box in the far left column for the entries you wish to delete, and click **DELETE SELECTED ENTRIES**. Click **CONTINUE** to complete deleting your entries.
6. Complete your meter entries by clicking **CONTINUE** in the bottom right-hand corner of the page. You will receive a notification in a green box on the next page that your meter entries have been successfully added.

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later.

Your Meter Entries for Test Property 1

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

1 Energy Meter(s) for Test Property 1

▼ 01234567 [Edit](#)

| | Start Date | End Date | Usage kWh (thousand Watt-hours) | Cost (\$) | Estimation | Green Power |
|--------------------------|------------|----------|---------------------------------|-----------|--------------------------|--------------------------|
| <input type="checkbox"/> | 1/1/2016 | 2/1/2016 | 100 | 100.00 | <input type="checkbox"/> | <input type="checkbox"/> |

[Delete Selected Entries](#)

[Add Another Entry](#)

[Learn how to copy/paste](#)

Upload data in bulk for this meter:

i You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

Choose File No file chosen

Upload

Back

Continue

Cancel

Option 2. Add Meter Entries by Spreadsheet Upload

1. Alternatively, you can upload your meter entries in bulk using a spreadsheet. Review the instructions in the FAQ document (see image below).

Upload data in bulk for this meter:

i You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

Choose File

ELEC_MeterC...dsheet.xlsx

Upload

2. Download the spreadsheet template and enter your usage information.
3. After you enter your usage information into the template, save it to your computer.
4. Click **CHOOSE FILE** or **BROWSE** (depending on your browser) to select the file from your computer.
5. Click **UPLOAD**. After uploading your spreadsheet, you should see meter entries on the page.
6. Complete your meter entries by clicking **CONTINUE**. You will receive a notification in a green box on the next page that your meter entries have been successfully added.

Option 3. Add Meter Entries by Connecting with SDG&E (Preferred; Energy Meters Only)

1. See Step 4, “Sharing Your Property and Meters with SDG&E,” for instructions on how to connect with SDGE Benchmarking for automatic upload of your energy data from SDG&E to Portfolio Manager.
 - This does not apply to water meters (you can only add water meter entries manually or by spreadsheet upload).
2. If connecting with SDG&E, then click **CONTINUE** to proceed with setting up your meters. You will receive a notification in a green box on the next page that your meter entries have been successfully added.

Select Meters to Include in Metrics

1. Select the boxes of the meters that total your property’s energy or water use.
 - In some cases, you might want to leave some meters unchecked. For example, if you have a main meter and a pool that is sub-metered, but whose energy is also captured by the main meter, you will only want to have the main meter checked as this prevents double counting of your pool’s energy consumption.
2. Select the first button to state that the meters selected account for your property’s total energy or water consumption.
3. Click **APPLY SELECTIONS**.
 - You will receive a congratulations message saying, “Congratulations! Any energy/water meters you selected have been successfully associated to your property(ies).”

Summary

1 Meters representing the **total** energy consumption for [Test Property 1](#) (a single building).

Energy Meters

Select all meters to be included in your Energy metrics. (Hint: All meters should be included unless they are [sub-meters](#).)

| | Name Meter ID | Type |
|-------------------------------------|--------------------------------------|-----------------|
| <input checked="" type="checkbox"/> | 01234567 20641250 | Electric - Grid |

Total of 1 meter(s). Tell us what this represents:

- These meter(s) account for the total energy consumption for [Test Property 1](#) (a single building).
- These meter(s) do not account for the total energy consumption for [Test Property 1](#) (a single building).

Apply Selections
Cancel

4) Sharing Your Property and Meters with SDG&E

To enable others to view and/or edit your property and meter information, you need to add contacts to your account and share your property and meters with those contacts. In this section, we will describe the process for sharing your property and meters with SDG&E.

Adding SDG&E as a Contact

You can connect with San Diego Gas & Electric (SDG&E®) for automatic upload of your energy meter consumption data into Portfolio Manager. The first part of the process of connecting with SDG&E's benchmarking web services is to add SDGE Benchmarking as a contact.

1. Once logged in, click the **CONTACTS** link at the top right of the page.
2. In the search field box, enter **SDGE BENCHMARKING** and then click the **SEARCH FOR NEW CONTACTS** button.

MyPortfolio
Sharing
Reporting
Recognition

My Contacts

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for

Search for new contacts

3. Click the **CONNECT** button, read the Terms & Conditions and submit the connection request.



4. SDG&E's web services processes contact requests automatically at 1 p.m. (PT) daily. You can see the status of your contact requests by clicking the MyPortfolio tab and looking under the "Notifications" table on the right-hand side. You should see a notification that says a request has been sent to SDGE Benchmarking. This is also where you will receive a notification about whether or not SDGE Benchmarking accepted your request.

Once you have added SDG&E as a contact, follow the steps below to share your property and meters with SDG&E.

Confirm Your Meter Names

Before you share your property with SDG&E, it is recommended that you confirm your energy meter names match your eight-digit SDG&E meter numbers as shown on your utility bill.

1. Click a property in Portfolio Manager.
2. Navigate to the **ENERGY** or **WATER** tab..
3. Click on the meter name in blue that needs to be updated.
4. On the next page, click the **BASIC METER INFORMATION** bar to edit the meter name.
5. In the **NAME** field, enter ONLY the eight-digit meter number beginning with 0 (if you have a seven-digit number, add a 0 at the beginning).
6. Click **SAVE CHANGES**.

Basic Meter Information

Name: [Delete Meter](#)

Meter ID: 20293138

Type: Electric - Grid [Need to change?](#)

Units: kWh (thousand Watt-hours)

Date Meter became Active: [Calendar](#)

Still In Use

Date Meter became Inactive: [Calendar](#)

Save Changes

Submit a Share Request for all Buildings and Energy Meters

You will need a copy of your most recent bill to provide the account number and last bill amount to be added to the already existing meter number in Portfolio Manager.

1. Navigate to the **SHARING** tab in your Portfolio Manager account and click **SHARE (OR EDIT ACCESS TO) A PROPERTY**.
2. Select the property or properties to share:
 - You can choose to share one, multiple or all properties.
3. Select the People (Accounts) you want to share your property/properties with:
 - Choose **SDGE Benchmarking (SDGE)**.

MyPortfolio **Sharing** Planning Reporting Recognition

My Shared Properties (1)

Share (or Edit Access to) a Property

Download Sharing Report

Sharing Notifications (0)

You have no new notifications.

Overview of Shared Properties [Learn more about Sharing Properties](#)

By Contact By Property

Owned By (PDA): Shared By: In Group:

4. Select the **PERSONALIZED SHARING & EXCHANGE DATA** option to allow for data exchange and click **CONTINUE**.
5. Select permissions for SDG&E by clicking the **EXCHANGE DATA** button.

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact
The access levels you select do not have to be the same for each property or each person.

Sort by:

| Name (ID) | No Access | Read Only Access | Full Access | Custom Access | Exchange Data |
|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Test_Property_1 (4971562) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| SDGE_Benchmarking | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Who gets to Share Forward?

Full Access - Automatically includes "Share Forward" rights

Read Only - Automatically does NOT include "Share Forward" rights

Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Exchange Data - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Share Property(ies) [Cancel](#)

6. A new window will pop-up. Fill in all required fields and change the permissions to **Full Access** to all properties and meters being shared:
 - Is this property being benchmarked because of AB 1103? **N**
 - Do you require monthly meter updates? **Y**
 - Choose **Full Access** for each line item.
 - All share requests **MUST** use the **"Full Access"** option, including properties and meters. Any access level other than **"Full Access"** will result in a rejected meter or property share request.
 - For each meter enter:
 - The SDG&E account number associated with the meter (first 10 digits only).
 - The most recent bill amount for that meter (do not add a \$).

- Under **Additional Options**, decide if you want SDG&E to have the ability to **Share Forward**.
 - In most cases, you will likely select **No**.

7. Scroll to the bottom of the pop-up and click **APPLY SELECTIONS AND AUTHORIZE EXCHANGE.**

- If the page seems unresponsive, scroll up to the top to see if any error messages were generated. If there is an error, fix it and try this step again.

Is this property being benchmarked because of AB1103? [Y/N]:

Answer [Y] if you are requesting data for this property to comply with AB1103.; 1 - 1 Characters

Do you require monthly meter updates? [Y/N]:

Answer [Y] if you require SDGE to update the meters for this property.; 1 - 1 Characters

Select the permission level below that you would like to grant [SDGE Benchmarking](#) for each category.

| Item | None | Read Only Access | Full Access | Bill Account Number ¹ | Last Bill Amount ² |
|-----------------------------------|-----------------------|-----------------------|----------------------------------|---|-------------------------------------|
| Property Information | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | | |
| ▼ All Meter Information | | | | | |
| 01234567 | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="text" value="0123456789"/> | <input type="text" value="100.00"/> |
| Goals, Improvements, & Checklists | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | | |
| Recognition | <input type="radio"/> | | <input checked="" type="radio"/> | | |

¹ Bill Account Number: Account number needs to include leading zeros. [Example: 0022456873]; Between 10 and 10 Characters [More Information](#)

² Last Bill Amount: At Least 3 Character(s) [More Information](#)

Additional Options:

| Item | Yes | No |
|--|-----------------------|-----------------------|
| * Share Forward Allow SDGE Benchmarking to share this property with others and give them any permissions that he/she has, including the right to share with more people. | <input type="radio"/> | <input type="radio"/> |



Sending Requests to SDG&E

SDG&E's web services processes contact and property requests automatically at 1 p.m. (PT) daily.

You can see the status of your contact requests by clicking the **MYPORTFOLIO** tab and looking under the "Notifications" table on the right-hand side. You should see a notification that says a request has been sent to SDGE Benchmarking. This also is where you will receive a notification about whether or not SDGE Benchmarking accepted your request.

8. If you are sharing more than one property, repeat these steps for all remaining properties.
9. Click **SHARE PROPERTIES**.
10. You should receive a message in a green box saying "You have successfully shared/edited access to your property(ies)."

MyPortfolio | **Sharing** | Planning | Reporting | Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact
The access levels you select do not have to be the same for each property or each person.

Sort by: Property Name ▾

| Name (ID) | No Access | Read Only Access | Full Access | Custom Access | Exchange Data |
|---------------------------|-----------------------|-----------------------|-----------------------|-----------------------|----------------------------|
| Test Property 1 (4971341) | | | | | |
| SDGE Benchmarking | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> Edit |

Who gets to Share Forward?
Full Access - Automatically includes "Share Forward" rights
Read Only - Automatically does NOT include "Share Forward" rights
Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
Exchange Data - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Share Property(ies) Cancel

Generating Reports

It is easy for you to see trends and to track improvement for your entire portfolio of buildings with a variety of standard graphs and reports in Portfolio Manager. Follow these steps to view reports about your properties and to assess progress. To get started, log in to Portfolio Manager at portfoliomanager.energystar.gov. Then, click the **REPORTING** tab to view graphs and reports for a property or portfolio.

There are three types of reports:

- A. Standard reports using templates provided in your account.
- B. Quick charts and graphs for your portfolio (all your properties) that focus on site and source energy use intensity and ENERGY STAR score.
- C. Five different ENERGY STAR performance documents.

Reporting | MyPortfolio | Sharing | Planning | Recognition

B Charts & Graphs

C ENERGY STAR Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Score Card

A Templates & Reports (8) [Create a New Template](#)

| Name | Status | Action |
|--------------------|------------------------------|--------------|
| Energy Performance | Generated: 5/23/2016 3:16 PM | I want to... |

A) Generate Standard Reports Using Templates

1. Go to the action menu for the report and select “Generate a New Report.”

Templates & Reports (8) Create a New Template

| Name | Status | Action |
|--|------------------------------|--|
| Energy Performance | Generated: 5/23/2016 3:16 PM | I want to... |
| Performance Highlights | No Report Generated | I want to... I want to... Generate New Report |
| Emissions Performance | No Report Generated | I want to... |
| Water Performance | No Report Generated | I want to... |
| Fuel Performance | No Report Generated | I want to... |
| ENERGY STAR Certification Status | No Report Generated | I want to... |
| Partner of the Year Report | No Report Generated | I want to... |
| Sustainable Buildings Checklist Report | No Report Generated | I want to... |

Generated reports will only be available for 30 days. After that time you will need to generate a new report to obtain data with your template.


2. Select the timeframe for your report.
 - You can choose a single year or you can compare two years.
3. Select the number of properties for the report.
 - Please note that if you don't have a full 12 months of data for the selected timeframe, most metrics will not be calculated and will be displayed as “not available” in the report.
4. The list of metrics the EPA has pre-selected for the standard report is displayed at the bottom of this page. For an explanation of each metric, hover over its name.
 - You cannot change the metrics selected for standard reports.
5. Once you have made your selections, click **GENERATE SPREADSHEET**.
 - You will be taken back to the **REPORTING** tab and should see a notification message in a green box that saying your report is being generated.

Create Performance Highlights

In order to generate the spreadsheet, you will need to first select the timeframe of information to include as well as the properties from your account that you would like to see in the spreadsheet. Once you have done this, you will be able to generate your spreadsheet.

1 Select Timeframe

Timeframe: *

 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.

2 Select Properties

Properties: *

3 Review Included Metrics

| Metric Category | Metric Name |
|----------------------------|---|
| Property ID Numbers | Portfolio Manager Property ID |
| Property Information | Property Name |
| Property ID Numbers | Portfolio Manager Parent Property ID |
| Property Information | Parent Property Name |
| Property Information | City |
| Property Information | State/Province |
| Property Information | Postal Code |
| Property Information | Property GFA - EPA Calculated (Buildings) |
| Energy Performance Metrics | ENERGY STAR Score |
| Energy Performance Metrics | Site EUI |

Generate Spreadsheet

[Cancel](#)

Making Changes

Once you select the timeframe and properties, they will be saved for the report. If you want to generate the report with a different timeframe or properties, you will need to come back here to make edits.

Need to Change the Metrics?

Metrics in this template were selected by EPA to help you understand key aspects of your performance. If you'd like to make your own report with different metrics, you can [create a new template](#).

- Once your report is generated, you will see a notification in a green box in the second half of the screen that states, "Your new report(s) has been generated."
 - You will also see a new report listed in the table, highlighted in green.
 - The status column on this page indicates the date and time to report was most recently generated.
- Click the drop-down box under the "Action" column.
 - From this menu, you can download the report in Excel or XML format.


- If you want to change the timeframe or selected properties, choose “select properties and timeframes” and regenerate the report to refresh the report with new data.
 - If you update property use details, you must generate a new report using the action menu to see these changes in the report.
8. Choose “View Current Report” to review the information and metrics from the report, as well as download the report.

Your report "Performance Highlights" is being generated.

You may view your report by selecting "View Report" or "Download Report in Excel" from the action menu below. Large responses may take a longer time to prepare, but if you have included a small number of properties or metrics, it may be ready right now! [See your list below.](#)

Please note that each property you included should have a full 12 months of information for each timeframe. Otherwise, the metrics may not be able to be calculated. When this happens, "N/A" will be displayed in your report.

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 Score Card](#)

Templates & Reports (8) Create a New Template

Your new report(s) has been generated

| Name | Status | Action |
|------------------------|------------------------------|---|
| Performance Highlights | Generated: 5/31/2016 2:34 PM | <div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #fff; padding: 2px;">I want to...</div> <div style="background-color: #fff; padding: 2px;">I want to...</div> <div style="background-color: #0070c0; color: white; padding: 2px;">View Current Report</div> <div style="background-color: #fff; padding: 2px;">Download Current Report in Excel</div> <div style="background-color: #fff; padding: 2px;">Download Current Report in XML</div> <div style="background-color: #fff; padding: 2px;">Generate New Report</div> <div style="background-color: #fff; padding: 2px;">Select Properties and Timeframes</div> </div> |
| Energy Performance | Generated: 5/23/2016 3:16 PM | |
| Emissions Performance | No Report Generated | |

9. Click **CLOSE** to return to the **REPORTING** tab.

B) Generate Charts and Graphs

1. Click on a Charts and Graphs option on the upper-left corner of the **REPORTING** tab to see colorful graphs of how your portfolio (or group of properties) is performing.
 - This section allows you to see information about ENERGY STAR scores, as well as source and site energy use intensity, at the portfolio level.
 - Each charts and graphs page shows four figures. The top two figures show performance across your entire portfolio. The bottom two figures show baseline versus current performance broken down by group and by property type.
2. Individually print or download charts by clicking the appropriate icon in the upper-right corner of each figure.
3. Expand the table below the charts by clicking on any of the triangles. This table shows the raw data used to create the charts.
4. Navigate between charts by clicking on **NEXT REPORT** or **PREVIOUS REPORT**.
5. Click **CANCEL** in the lower right-hand corner to return to the **REPORTING** tab.

Weather Normalized Source EUI Report (As of 5/31/2016, 11:44:52 AM PDT)

Weather Normalized Source EUI is a measure of what your Source EUI would be under the normal conditions in your climate. Source EUI is a measure of the total energy required to operate your building (including energy losses from generation/transmission/distribution); therefore Weather Normalized Source EUI shows the total energy you would expect to use, if the weather conditions were the average ([More...](#))

Portfolio Average Weather Normalized Source EUI

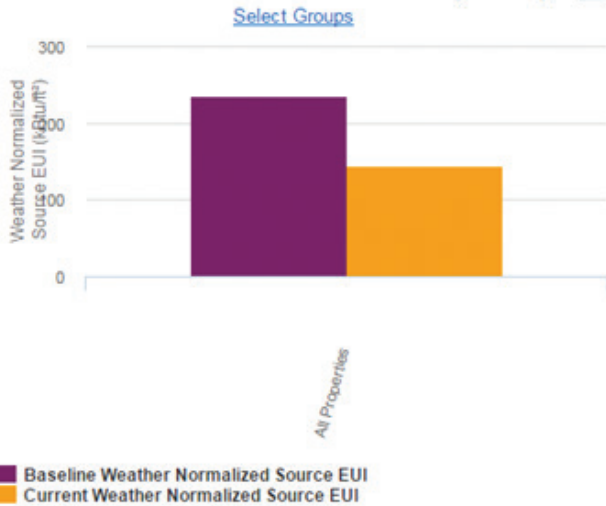
-91.4 ▶ Change in Average Weather Normalized Source EUI
 143.7 ▶ Current Average Weather Normalized Source EUI
 235.1 ▶ Baseline Average Weather Normalized Source EUI
 Properties Included: 3

Your Properties Compared to the National Median Source EUI

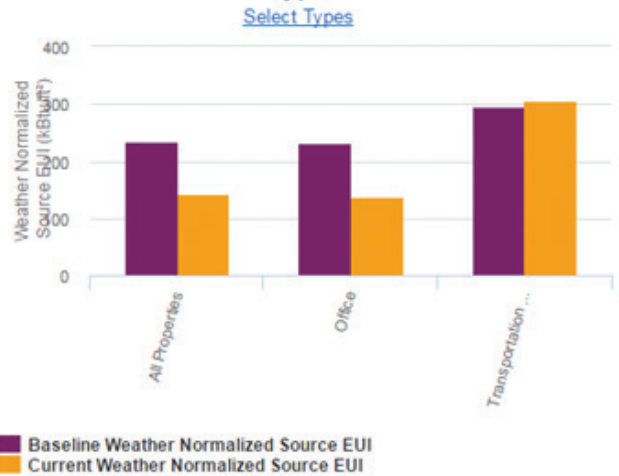


- Print chart
- Download PNG image
- Download JPEG image
- Download PDF document
- Download SVG vector image

Weather Normalized Source EUI by Group



Weather Normalized Source EUI by Property Type



[< Previous Report](#)

[Next Report >](#) [Cancel](#)

Raw Data for these Charts & Graphs

- ▶ Weather Normalized Source EUI Averages by Group
- ▶ Weather Normalized Source EUI Averages by Property Type
- ▶ Weather Normalized Source EUI Averages by State/Province
- ▶ Complete Reference Table

C) Generate ENERGY STAR Performance Documents

1. To download an ENERGY STAR performance document, click on the name of the report you wish to download.
2. Select one or multiple reports for download.
3. Choose properties and timeframes.
 - You can generate a report for the current year, the baseline year or any year in between.
4. If contact names are required for the selected reports, you will be prompted to select names from drop-down menus on this page.
 - If you do not see the contact or organization you want, you can add them using the hyperlinks.
5. Once you entered the necessary information, click **GENERATE AND DOWNLOAD REPORTS**.
6. Save any generated reports to your computer as they are *not* saved in Portfolio Manager.
 - You also can regenerate the performance documents later.

Generate and Download Reports

Portfolio Manager offers several standard reports for properties that can be useful in communicating your property's progress with others. These reports offer detailed information about your property for a single time period and are presented in a PDF format.

1 Select Report(s) to Download

- Statement of Energy Performance (SEP)
- ENERGY STAR Data Verification Checklist
- Score Card
- Progress and Goals Report
- Statement of Energy Design Intent (SEDI)

2 Select Property for Report(s)

Property:

3 Select Timeframe for Report(s)

Timeframe:

4 Select Contacts for Report(s)

Select Property Contacts:

Primary Contact: [Add Contact](#)
Property Owner: [Add Organization](#)
Verifying Professional: [Add Contact](#)

[Generate & Download Report\(s\)](#)

[Cancel](#)

Prefer to design your own report?

If none of these reports look like what you need, consider creating a [spreadsheet template](#) to pull the data you want and design your own report outside of Portfolio Manager.

Are you applying for recognition?

Although these reports look similar, if you are applying for either [ENERGY STAR certification](#) or [Designed to Earn](#) recognition, you must generate the required documentation by way of the application process.

Metrics on your Reports

In order to calculate metrics for your property for a given time period, there must be 12 months of complete meter data and property use detail information. If metrics (including the score) cannot be calculated for any reason, they will appear as "N/A" in your report.

Applying for ENERGY STAR Certification

Eligibility Requirements

To be eligible for certification, a property must:

1. Be located in the United States, U.S. territories or owned by the U.S. government.
2. Meet the definition of one of the eligible property types.

| | |
|---|----------------------------|
| Bank Branch | Multifamily Housing |
| Courthouse | Non-Refrigerated Warehouse |
| Data Center | Office |
| Distribution Center | Refrigerated Warehouse |
| Financial Office | Retail Store |
| Hospital | Senior Care Community |
| <i>(General Medical & Surgical)</i> | Supermarket/Grocery Store |
| Hotel | Wholesale Club/Supercenter |
| K-12 School | Worship Facility |
3. Receive an ENERGY STAR score of 75 or higher that reflects:
 - the whole property
(or campus for Hospitals, Hotels, K-12 Schools or Senior Care)
 - all energy use on the entire property for 12 months
 - accurate property use details
(with vacancy accounted for in Offices and Medical Offices, when appropriate)

Application Process

1. Benchmark your property in Portfolio Manager and achieve an ENERGY STAR score of 75 or higher.
 - The score is calculated based on the information entered into Portfolio Manager, which includes 12 months of energy data for all fuel types and the operational characteristics in effect during this time.
2. Begin the online application in Portfolio Manager by navigating to the property name on the **MYPORTFOLIO** tab. From the property summary page, on the top, to the left of the ENERGY STAR score, you should see a box with the ENERGY STAR logo.

- If your building is eligible for certification, the link will say, “Apply for ENERGY STAR Certification,” and clicking the link will take you to the online application.

The screenshot shows a button on the left with the ENERGY STAR logo and the text "Apply for ENERGY STAR Certification". To the right is a scorecard with a blue header "ENERGY STAR Score (1-100)". Below the header, it shows "Current Score: 100" and "Baseline Score: 100".

- If your property is not eligible for certification, it will say, “Not eligible to apply for ENERGY STAR Certification,” and clicking the link will provide further explanation as to why your property is ineligible.

The screenshot shows a button on the left with the ENERGY STAR logo and the text "Not eligible to apply for ENERGY STAR Certification". To the right is a scorecard with a blue header "ENERGY STAR Score (1-100)". Below the header, it shows "Current Score: 74" and "Baseline Score: 65".

3. Have a licensed professional (LP) conduct a site visit, verifying the information in your application.
 - For ENERGY STAR purposes, an LP is either a professional engineer or registered architect.
 - The LP can be a third party that you have hired – or they can be part of your organization.
 - While there is no cost associated with applying for ENERGY STAR certification, using a hired licensed professional to verify your information will have associated costs.
4. Complete the online application in Portfolio Manager, upload a scanned copy of the signed application and submit the application electronically to EPA.
5. Respond to questions from EPA, if necessary.

6. Receive notification of the application's status.
 - It typically takes about three weeks to review and process an application, barring significant issues.
 - Once the application is approved, the applicant should receive a letter of congratulations, certificate and decals in two to three weeks.
 - The year listed on the ENERGY STAR certification is based on the year in which the application was approved.

Deleting a Property

In some instances, you might wish to delete a property from your account. Please note that **deleting a property is PERMANENT and CANNOT BE UNDONE**. Follow the instructions below to delete a property.

1. Click the **MYPORTFOLIO** tab.
2. Under the box with the list of properties in your account, click the name of the property you wish to delete.
3. Once you are taken to the **PROPERTY LEVEL** view of the property you wish to delete, click the **DETAILS** tab.
4. Scroll to the bottom of the page, where you will see the button **DELETE THIS PROPERTY** in the bottom left-hand corner of the screen.
 - Note the information bulletin that states deleting your property is permanent and cannot be undone.
5. If you are sure you want to delete your property, click the **DELETE THIS PROPERTY** button.
 - A pop-up will appear confirming your decision.
 - Please remember that **DELETING A PROPERTY IS PERMANENT AND CANNOT BE UNDONE**.
6. If you are sure you want to delete the property, click **CONTINUE**; otherwise, click **CANCEL**.
7. If you click **CONTINUE**, you will go back to the **MYPORTFOLIO** tab and should see a green notification box at the top of the screen saying that you have deleted the property you selected from your portfolio.

Summary

Details

Energy

Water

Goals

Design

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
200,000 Sq. Ft.

Occupancy:
100%

Edit

Unique Identifiers (IDs)

Portfolio Manager ID:
4998569

Custom IDs: None

Standard IDs: None

You can select from Portfolio Manager's **Standard IDs** to provide information to others in data requests. Or you can create up to three **Custom IDs** so that you can cross reference your property in other systems.

Edit

Additional Information

Federal Property:
Not Set

Service & Product Provider:
None ([Find a SPP](#))

Edit

Delete this Property

Caution! Deleting your property is permanent.

Property Uses and Use Details

[View as Diagram](#)

Add Another Type of Use

Add

| Name | Property Use Type | Gross Floor Area | Action |
|---------------------------|-------------------|-------------------------|---|
| ▶ Building Use | Office | 200,000 ft ² | I want to... |
| Property GFA (Buildings): | | 200,000 | (used to calculate EUI) |
| Property GFA (Parking): | | 0 | |

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Property GFA by Use



Property Type

Property Type - Self-Selected:
Office [Edit](#)

Property Type - EPA Calculated:
Office

The EPA-Calculated Property Type is used for your metrics. [Learn more about property types.](#)

Property Notes

Use the following area to keep notes on your property.

Empty text area for property notes.

ADDITIONAL RESOURCES

Please visit these links for additional help and support.

Center for Sustainable Energy Resources

More information on benchmarking using ENERGY STAR Portfolio Manager is available on CSE's website: [EnergyCenter.org/Benchmarking](https://www.energycenter.org/Benchmarking).

Learn more about organizations already benchmarking their properties by reviewing Benchmarking Coach Case Studies at [EnergyCenter.org/sdrep/benchmarking/case-studies](https://www.energycenter.org/sdrep/benchmarking/case-studies).

Additionally, if you have any questions about using this guide, please contact a Benchmarking Coach at benchmarking@energycenter.org.

SDG&E Resources

SDG&E helps its customers obtain their building's energy usage information by providing both aggregated and nonaggregated energy data upon request.

If you have access to individual billing information for each meter (meter number, account number and last bill amount), then you can request nonaggregated energy usage from SDG&E directly from ENERGY STAR Portfolio Manager. You can find instructions on how to receive your nonaggregated energy usage from SDG&E at sdge.com/business/non-aggregated-energy-usage-data-program.

If you meet certain aggregation thresholds (three or more utility accounts for commercial properties or five or more utility accounts for properties with one or more residential units), then you can request aggregated whole building energy usage information from SDG&E. Instructions on how to request aggregated data energy usage are available at sdge.com/business/ab802-non-residential-owners-benchmarking.

If you have any questions on how to request your data from SDG&E, please contact a Benchmarking Coach at benchmarking@energycenter.org.

EPA ENERGY STAR Portfolio Manager

The EPA provides great resources on their website to help users with Portfolio Manager. Key links are provided in the following table.

| Resources | Hyperlink |
|---|---|
| <ul style="list-style-type: none"> • Extensive list of FAQs • Online form to submit technical questions or comments | energystar.gov/buildingshelp |
| <ul style="list-style-type: none"> • Additional Portfolio Manager training resources available at: <ul style="list-style-type: none"> – Step-by-step documents (PDF) – Access to recorded trainings and short videos – Information on upcoming trainings | energystar.gov/buildings/training |
| <ul style="list-style-type: none"> • Register for regular webinars | esbuildings.webex.com |
| <ul style="list-style-type: none"> • Portfolio Manager Technical Reference Series | portfoliomanager.zendesk.com/hc/en-us/articles/214620098-Where-can-I-find-Technical-Reference-Documents-for-Portfolio-Manager- |
| <ul style="list-style-type: none"> • Guidance on ENERGY STAR certification | energystar.gov/buildings/facility-owners-and-managers/existing-buildings/earn-recognition/energy-star-certification |
| <ul style="list-style-type: none"> • Full listing of all available property types and associated use details | energystar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details |



As a mission-driven nonprofit organization, CSE works with energy policymakers, regulators, public agencies and businesses as an expert implementation partner and trusted information resource. Together, we are the catalysts for sustainable energy market development and transformation.

HEADQUARTERS

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