



## **Benchmarking Your Building Using ENERGY STAR® Portfolio Manager®**

A step-by-step guide to completing an energy and water benchmarking in  
Portfolio Manager®

Portfolio Manager help, training webinars, and office hours are also available, at  
[portfoliomanager.energystar.gov/pm/help](https://portfoliomanager.energystar.gov/pm/help)

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## What is benchmarking?

Benchmarking is the process of evaluating the energy performance of a facility relative to key indicators, including the performance of peers and the historic performance of one's own facility. ENERGY STAR Portfolio Manager provides a relevant source of comparative energy performance metrics by normalizing energy use of similar facilities by space-type, floor area, operating hours, climate, and other space attributes.

## Support

For resources, guidance, and additional information, visit [www.energystar.gov/buildings/training](http://www.energystar.gov/buildings/training). Buildings within the City of Atlanta may receive additional technical guidance on benchmarking and using Portfolio Manager by calling the Atlanta Help Desk at 404-604-3665 or emailing [Benchmarkhelp@southface.org](mailto:Benchmarkhelp@southface.org).

## Electronic Utility Data Retrieval

For buildings located within the City of Atlanta, utility data can be retrieved electronically for Georgia Power, City of Atlanta Department of Watershed Management, and many natural gas providers. Electronic data retrieval makes it very easy to setup and maintain a Portfolio Manager account. This is optional but highly recommended if you are setting up an account for the first time (more than 3 years of data for each meter) or if you have multiple properties. Other electric service providers will have different user interfaces that then following example from Georgia Power, but this example will give you an idea of the data required for Portfolio Manager and the necessary steps to collect that information.

## Electricity Data from Georgia Power

Georgia Power uses the [Energy Direct website](#) for commercial accounts and the [Southern Company website](#) for residential accounts.

To access your data you will need either:

- A copy of your Georgia Power bill  
OR:
- The **Account Number** and **Web Access Code**, both found on your Georgia Power bill, gather these items before you begin.

# Benchmarking Your Building Using ENERGY STAR Portfolio Manager



Customer Name

Account Number  
12345-12345

Please Pay By Aug 22, 2013

Total Due

Service Address

Service Period

Contact Us 24 hours a day, 7 days a week

georgiapower.com

### Billing Summary

Previous Bill Amount		\$ 1,452.99
Payment Received On 07/22/13	Thank You!	-1,452.99
Current Electric Service		+1,282.88

**Total Due \$ 1,282.88**

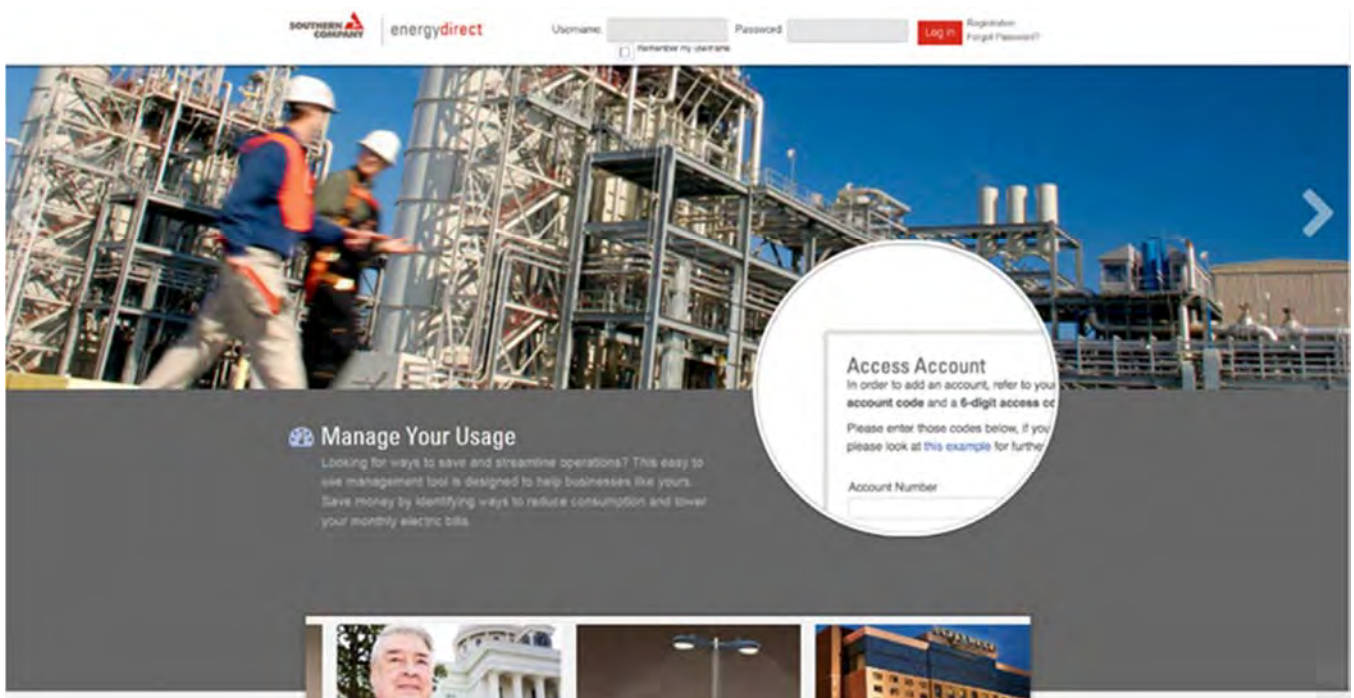
Balances unpaid 7 days after the total due date are subject to a late charge of 1.5% of the amount due or \$2.00, whichever is greater.

Account Number	Web Access Code
Customer Service	Power Outage Reporting
1-888-655-5888	1-888-891-0938

### Payment Options

**Online** Just visit georgiapower.com/mypayment  
Login to your account using the following:  
Account number: 16668-67000  
Web access code: 661616

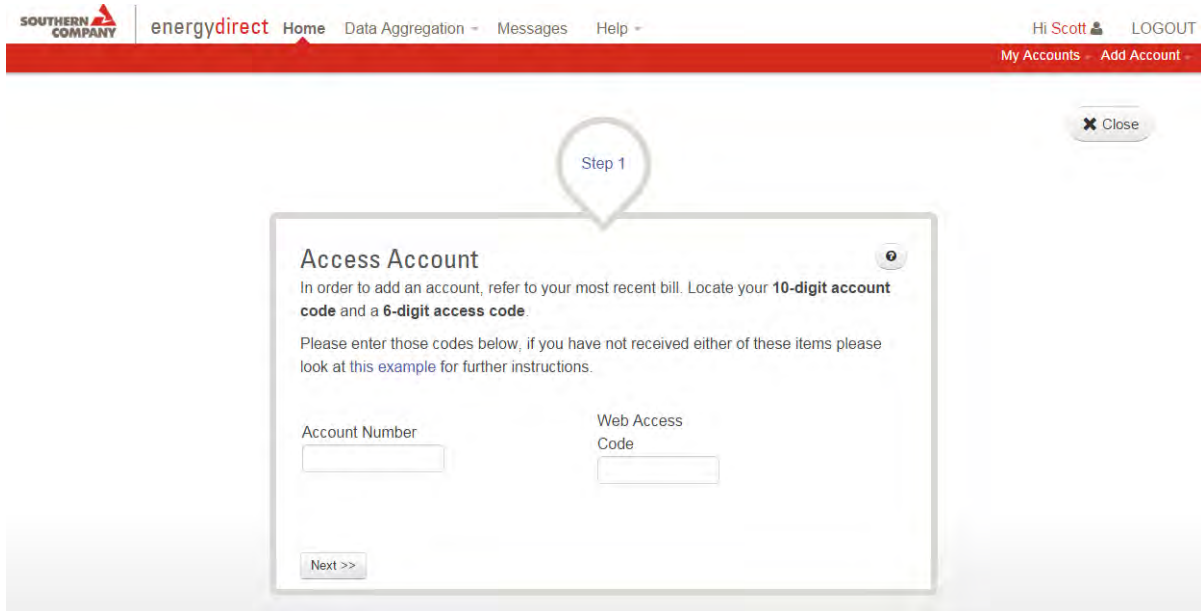
1. In a web browser, open the website [www.energydirect.com](http://www.energydirect.com). Click **Log In**.



2. Click **Add Account** link on the right side of the screen.



3. Enter the **Account Number** and **Web Access Code** from your Georgia Power bill and click next.



4. It is recommended that the “Account Description” is changed to match the name of the building or space served by the meter. Click “Save” to save and access the account. **\*\*Note that the same utility meter can be saved to multiple user accounts.**
  - The utility bills for the selected meter will be displayed for the most recent 12 months. Change the Time Period displayed by changing the “Start” and “Stop” fields to match your desired selection. Click “Submit” to display the desired selection.
  - Hurray! You now have access to your electricity bills through Energy Direct.
5. Highlight the table, *copy and paste* the selected data into a spreadsheet to capture and manipulate the data.
6. Format the electronic data for use with Portfolio Manager. Save this spreadsheet for future use, since the formatting process will be exactly the same.
  - All of inputs on this page are optional; however, it is recommended that the “Account Description” is changed to match the name of the building or space served by the meter. Click “Save” to save and access the account. Note that the same utility meter can be saved to multiple user accounts.

Energy Star Portfolio Manager					
Project Name:	ACCOUNT NAME				
Service Address:	1234 EXAMPLE FACILITY/ ATLANTA, GA 30308				
Account Number:	123456789				
<i>This data is formatted for Energy Star Portfolio Manager. Past this data (values only) into the Upload Template provided on the website.</i>					
Start Date	End Date	Usage	Cost	Estimated Value	
12/9/2008	1/12/2009	4240	648	FALSE	
1/13/2009	2/10/2009	8960	1202	FALSE	
2/11/2009	3/12/2009	5240	793	FALSE	
3/13/2009	4/12/2009	4120	633	FALSE	
4/13/2009	5/27/2009	4560	720	FALSE	
5/28/2009	6/25/2009	3920	604	FALSE	
6/26/2009	7/27/2009	4080	627	FALSE	
7/28/2009	8/26/2009	3760	581	FALSE	
8/27/2009	9/27/2009	3560	553	FALSE	
9/28/2009	10/26/2009	3120	490	FALSE	
10/27/2009	11/23/2009	3440	536	FALSE	
11/24/2009	12/27/2009	6000	901	FALSE	
12/28/2009	1/26/2010	8280	1147	FALSE	

## Gas Utility Data

1. Locate the beginning cycle date, end cycle date, consumption (usage), and cost data from your bill.
2. Consumption (usage) will be measured in one of three ways:
  - Delivery/Bulk – note this when setting up the meter in ESPM, it will only be recorded when it is delivered
  - Therms – a measure of energy; more accurate entry for actual energy consumption

Prior Reading (Actual)	Current Reading (Actual)	CCF Used	BTU Factor	Therms	Price Per Therm
2930	2936	6	1.021	6.126	1.189
Prior Reading Date	Current Reading Date	Days of Service	Meter Number		
06/27/2014	07/29/2014	32	[REDACTED]		

*Volume (good)* (points to CCF Used: 6)  
*Energy (better)* (points to Therms: 6.126)

**\$ Explanation of Charges**

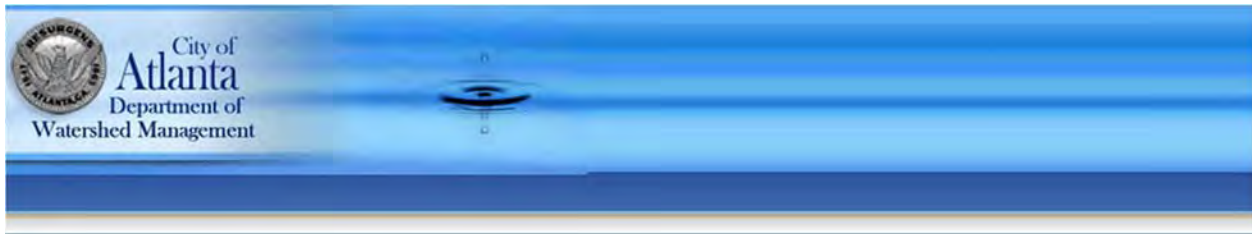
Previous Balance	\$46.17
Payments Received	46.17 CR
<b>Balance Brought Forward</b>	<b>0.00</b>
<b>Current Gas Service Charges</b>	
AGLC Base Charge	29.60
GNG Customer Service Charge	6.95
Gas Charge	7.28
Interstate Pipeline Capacity Charge	1.30
Sales Tax	3.61
<b>Total Current Gas Service Charges</b>	<b>48.74</b>


- CCF – a measure of volume; okay to use if therms are not shown on the bill

## Water Data from City of Atlanta

Up to one year of water consumption history can be retrieved electronically from the [City of Atlanta WebConnect! Website](#). To retrieve older data, contact your customer representative and ask that they send consumption and billing data beginning on or before your preferred date to current in spreadsheet form.

1. To access your water consumption data, you will need to create an account. If you already have an account, click **Sign In** and proceed to step 7.2.4.
2. To create an account, please gather the following items:
  - a. Account Number
  - b. Zip Code for the account service address
  - c. Last 4 digits of the company Tax Identification Number or the last 4 digits of the account holder's Social Security Number.
3. After gathering these items, click **Create Account** to get started.



  
**Please sign in to your account**

Welcome to the City of Atlanta's WebConnect! View your water billing history and water consumption history whenever it's convenient for you! Please remember to pay your bill within 7 business days prior to the due date.

**User Name**

**Password**


[Sign In](#)

Forgot your [User Name](#) or [Password](#) ?

First time user? [Create Account](#)

4. Enter the account number from a water bill into the field and click **Continue**.

## Registration

To begin registration, please enter your account number below.   
You can find your account number on your bill.

**Account Number**

[Continue](#) [Cancel](#)

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5. Enter the last four digits of the Tax ID Number (TIN) and account Zip Code. Complete the other required fields and click **Continue**.

### Registration

Items marked with an asterisk (\*) are required fields.

Verify Utility Account Information	
Account Number	<input type="text"/>
Last Four Digits of Tax Id Number*	<input type="text"/>
5-Digit Mailing Address Zip Code*	<input type="text"/>

---

Create Online Profile	
User Name*	<input type="text"/>
Password*	<input type="text"/> <small>Must be between 6 - 12 characters</small>
Re-entered Password*	<input type="text"/>
First Name	<input type="text"/>
Middle Name or Initial	<input type="text"/>
Last Name	<input type="text"/>
Email Address*	<input type="text"/>

---

Enter Secret Information	
Secret Question*	<input type="text" value="What is the name of your high school?"/>
Secret Answer*	<input type="text"/>

[Continue](#) [Cancel](#)

6. Select **Consumption History** from the menu on the left to view the water and sewage consumption for each of your accounts.

Welcome, Maria Quinones | [Log Out](#)

**My Accounts**

[Add Utility Accounts](#) | [Manage My Profile](#)

Thank you for using WebConnect - online access to your water account information!

[Pay All Accounts](#)

[My Account](#) [Make Payment](#)

Current Amount Due: \$2,226.47 on September 23, 2013


[View Latest Bill](#)

7. Ensure that the account in the drop down menu next to the **Account Number** field shows the account for which you wish to retrieve water consumption history. If not, click on the drop down menu to select the desired account.



- Download the water consumption history as a spreadsheet by clicking **Export to Excel**. Note that the **Sewer** consumption does not need to be tracked in Portfolio Manager. Also, the cost information is not shown in the consumption history table.

- My Accounts
- Account Summary
- Billing Details
- Payment Details
- Make a Payment
- Payment Options
- Consumption History
- Electronic Bill Delivery
- Care & Conserve
- My Profile
- How to setup a recurring payment plan
- Log Out



### Current Consumption Details > WATER Service

Welcome to the Water Consumption History Screen! Your consumption is measured in 100 cubic feet (CCF) increments.

**Account Number** [REDACTED] My Account

**Customer Name**

**Utility Service** WATER SEWER

**Type of Meter** NORMAL

**Meter Number** NE518 **Reading Date** 08/26/2013

**Current Usage** 103 CCF **Start Reading** 4321

**Meter Location** **End Reading** 4424

**Rate** Inside Water **Reading Type** AMR RD

[Hide Consumption History](#)

WATER Consumption History [Export to Excel](#)

Read Date	Meter #	Consumption (reflected in CCF's)
08/26/2013	NE51E	103
07/24/2013	NE51E	91
06/24/2013	NE51E	127
05/24/2013	NE51E	149
04/24/2013	NE51E	111
03/25/2013	NE51E	90
02/25/2013	NE51E	106
01/24/2013	NE51E	91
12/21/2012	NE51E	78
11/26/2012	NE51E	76
10/25/2012	NE51E	66
09/26/2012	NE51E	85
08/27/2012	NE51E	127

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

- Click on **Billing Details** on the menu to the left. Ensure that the desired account is selected from the drop down menu next to **Account Number**. Download the water cost history to a spreadsheet by clicking **Export to Excel**.

My Accounts

Account Summary

**Billing Details**

Payment Details

Make a Payment

Payment Options

Consumption History


Electronic Bill Delivery

Care & Conserve

My Profile

How to setup a recurring payment plan

Log Out



### Current Billing Details

Please pay your bill on time to avoid service interruption and/or late fees/penalties!

**Account Number** XXXXXXXXXX My Account ▼

**Customer Name** My Account

**Current Amount Due** **\$2,226.47** [Show Details](#) [Make Payment](#)

**Last Billed Amount** \$2,226.47 [View Latest Bill](#)

**Latest Billing Date** September 06, 2013

**Due Date** September 23, 2013

**Billing History** [Export to Excel](#)

Billing Date	Due Date	Bill Amount	
09/06/2013	09/23/2013	\$2,226.47	<a href="#">View Bill</a>
08/08/2013	08/25/2013	\$1,964.27	<a href="#">View Bill</a>
07/08/2013	07/25/2013	\$2,750.87	<a href="#">View Bill</a>
06/12/2013	06/29/2013	\$3,231.57	<a href="#">View Bill</a>
05/07/2013	05/24/2013	\$2,401.27	<a href="#">View Bill</a>
04/09/2013	04/26/2013	\$1,942.42	<a href="#">View Bill</a>
03/05/2013	03/22/2013	\$2,292.02	<a href="#">View Bill</a>
02/07/2013	02/24/2013	\$1,964.27	<a href="#">View Bill</a>
01/07/2013	01/24/2013	\$1,680.22	<a href="#">View Bill</a>
12/06/2012	12/23/2012	\$1,636.52	<a href="#">View Bill</a>
11/06/2012	11/23/2012	\$1,418.02	<a href="#">View Bill</a>
10/09/2012	10/26/2012	\$1,833.17	<a href="#">View Bill</a>
09/06/2012	09/23/2012	\$2,750.87	<a href="#">View Bill</a>
08/06/2012	08/23/2012	\$1,483.57	<a href="#">View Bill</a>

Thank you for using WebConnect - online access to your City of Atlanta water account information!

## Register for a New Portfolio Manager User Account

Register for an ENERGY STAR Portfolio Manager user account via the following link:

<https://portfoliomanager.energystar.gov/pm/signup>.

1. Choose a username and password.

The screenshot shows the 'Create an Account' page. At the top left is the ENERGY STAR Portfolio Manager logo. At the top right are links for 'Help | Login' and 'Language: English | Français'. Below the logo is the heading 'Create an Account' and a link 'Already have an account? [Sign In Here](#)'. The main form area is titled 'Create Your Account' and contains three input fields: 'Username:', 'Password:', and 'Confirm Password:'. The 'Password:' field has a note: 'Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as !, #, %, etc.)'. To the right of the form is a section titled 'Getting Started' with an information icon. It contains the text: 'Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.'

2. Enter user details.

The screenshot shows the 'About Yourself' section of the registration form. It contains several input fields: 'First Name:', 'Last Name:', 'Job Title:', 'Email:', 'Confirm Email:', 'Phone:', 'Country:' (a dropdown menu with 'Select Country' selected), 'Language:' (a dropdown menu with 'English' selected), 'Reporting Units:' (radio buttons for 'Conventional EPA Units (e.g., kBtu/ft²)' and 'Metric Units (e.g., GJ/m³)'), 'Street Address:' (two stacked input fields), 'City/Municipality:', 'State/Province:' (a dropdown menu with '--- Select ---' selected), and 'Postal Code:'. To the right of the form is a section titled 'Accounts for Organizations' with an information icon. It contains the text: 'If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division'.

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

3. Enter organization name and set preferences for web services.

### About Your Organization

Organization Name:

Primary Business or Service of Your Organization:

Is your organization an ENERGY STAR Partner?  Yes  No

**Primary Business or Service**

If you have more than one "primary business," just pick the best option. Portfolio Manager will determine your category for a score based on the information, like square footage, that you enter for each of your property uses.

4. Set preferences for searchability by other Portfolio Manager users.

### Searchability in Portfolio Manager

Can other people search for you and send you a connection request?  Yes  No

**Connecting with Others in Portfolio Manager**

You can [connect with other people](#) in Portfolio Manager to easily share information. Your account must be searchable in order for others to send you a connection request.

5. Pick security questions for password recovery and complete account registration.

### Recovering Access to Your Account

In the event that you forget your username or password, Portfolio Manager will ask for answers to your security questions to protect access to your account.

Security Question 1:

Your Answer:

Security Question 2:

Your Answer:

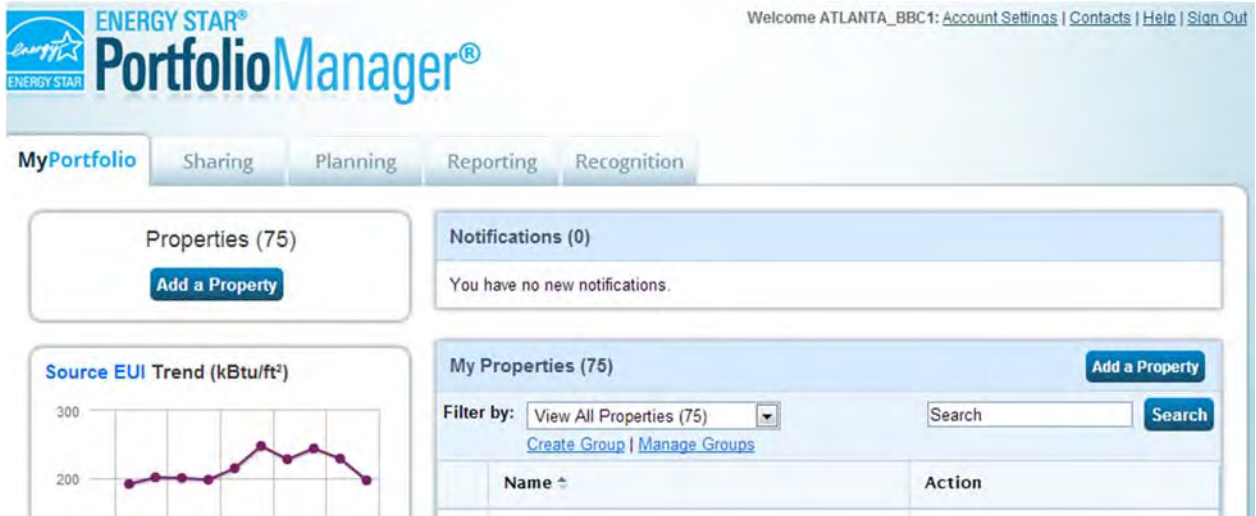
[Create My Account](#) [Cancel](#)

**Security Questions**

Portfolio Manager will randomly select one of your security questions to verify your identity in specific situations, for example, if you forget your password.

## Add a New Property to Portfolio Manager

1. Click **Add a Property** on the **MyPortfolio** tab.



2. Answer questions about your property and click **Get Started!**
3. Enter basic property information and select the boxes next to the statements that apply to your property. Then click Continue.

### 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's Primary Function

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

Select a primary function

[Learn more about primary functions/property types.](#)

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#### 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

How many?

---

#### 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.

**Tip**

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#). You can use our handy [data collection worksheet](#), in advance, to prepare the information that you will need to complete this process.

**Tip**

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.

Get Started!

Cancel

### About Your Property

Name:

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

Year Built:

Gross Floor Area:    Temporary Value

Gross Floor Area is the total floor area, expressed in square feet or square meters, measured from the principal exterior surfaces of the building(s) and not including parking area(s).

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](#)

- Do NOT include parking in Gross Floor Area.  
- Use total not rented Sq. Ft.

- Select the space-use types that are applicable to your facility. By default, the gross floor area entered on the previous screen will be used for the primary space-use type. This value will need to be adjusted, if your facility contains more than one space-use type.

### Basic Information

Name:	Sample Property	Country:	US
Primarily:	Office	Address:	1234 Peachtree St. <a href="#">Map It</a>
Year Built:	1990		Atlanta, GA 30308

Property consists of: 1 building [Edit](#)

**Building Use** [Edit Name](#)

Office refers to buildings used for the conduct of commercial or governmental business activities.

Add Another Type of Use

Add Another Type of Use

Banking/Financial Services

Bank Branch

Financial Office

Education

Adult Education

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

5. Enter space attribute details such as gross floor area, operating hours, and number of workers for each type of use. You can use default or temporary values at this time and enter more accurate data later.
  - Be sure to update this information as the average changes, this will affect your EUI.

▼ Office Use [Edit Name](#)
Delete

Office refers to buildings used for the conduct of commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area should include all space within the building(s) including offices, conference rooms and auditoriums, kitchens used by staff, lobbies, fitness areas for staff, storage areas, stairways, and elevator shafts.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	<input style="width: 100px;" type="text" value="50000"/> Sq. Ft. ▼	01/01/1990	<input type="checkbox"/>
Weekly Operating Hours	<input style="width: 100px;" type="text" value="50"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>
Number of Computers	<input style="width: 100px;" type="text" value="200"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>
Number of Workers on Main Shift	<input style="width: 100px;" type="text" value="200"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>
Percent That Can Be Heated	<input style="width: 100px;" type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>
Percent That Can Be Cooled	<input style="width: 100px;" type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>

- Hover over any items in **blue text** to see a brief definition of the term.

▼ Office Use [Edit Name](#)
Delete

Office refers to buildings used for the conduct of commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area should include all space within the building(s) including offices, conference rooms and auditoriums, kitchens used by staff, lobbies, fitness areas for staff, storage areas, stairways, and elevator shafts.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	<input style="width: 100px;" type="text" value="50000"/> Sq. Ft. ▼	01/01/1990	<input type="checkbox"/>
Weekly Operating Hours	<input style="width: 100px;" type="text" value="50"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>
Number of Computers	<input style="width: 100px;" type="text" value="200"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>
Number of Workers on Main Shift	<input style="width: 100px;" type="text" value="200"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>
Percent That Can Be Heated	<input style="width: 100px;" type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>
Percent That Can Be Cooled	<input style="width: 100px;" type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	01/01/1990	<input type="checkbox"/>

**Gross Floor Area**

The Gross Floor Area is the total size, as measured between the principal exterior surfaces of the enclosing fixed walls of the building(s). This includes *all areas* inside the building(s) such as: occupied tenant areas, common areas, meeting areas, break rooms, restrooms, elevator shafts, mechanical equipment areas, and storage rooms. Gross Floor Area... (Click to view the full term in the glossary)

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

6. Click **Add Property**. When you have successfully added your property, you will see the property's **Summary Tab**.

The screenshot displays the 'MyPortfolio' interface. At the top, there are navigation tabs: 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. A green message box states: 'Congratulations! You have successfully created your property. Next, you can: • [Add energy use information](#), so that you can see your energy performance metrics.'

The main content area shows a 'Sample' property with the following details:

- Address: 123 apple drive, Atlanta, GA 30305 | [Map It](#)
- Portfolio Manager Property ID: 4941641
- Year Built: 2000
- [Edit](#) button

To the right of the property details is a grey box with the ENERGY STAR logo and the text: 'Not eligible to apply for ENERGY STAR Certification'. Further right is a blue box titled 'Weather-Normalized Source EUI (kBtu/ft²)' with a 'Why not score?' link. Below this title, it shows 'Current EUI: N/A' and 'Baseline EUI: N/A'.

At the bottom, there is a navigation bar with tabs: 'Summary', 'Details', 'Energy' (with a red exclamation mark), 'Water' (with a red exclamation mark), 'Goals', and 'Design'.



## Input Utility Data for a Property

1. Click on your property from the **MyPortfolio** tab and then select the **Energy** or **Water** tab.

Welcome ATLANTA\_BBC1: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

**ENERGY STAR PortfolioManager®**

MyPortfolio | Sharing | Planning | Reporting | Recognition

Not eligible to apply for ENERGY STAR Certification

**ENERGY STAR Score (1-100)**  
 Current Score: 96  
 Baseline Score: 92

Edit

Summary | Details | Energy | **Water** | Goals | Design

Notifications (0)  
 You have no new notifications.

Property Profile  
  
[View Profile](#)  
[Edit Profile](#) [Delete Profile](#)

Source EUI Trend (kBtu/ft<sup>2</sup>)  
 100

**Metrics Summary** [Change Time Period](#)

Metric	Baseline (Dec 2009)	Current (Dec 2015)	Change
ENERGY STAR score (1-100)	92	96	4(4.3%)
Source EUI (kBtu/ft <sup>2</sup> )	92.4	71.5	-20.9(-22.6%)
Site EUI (kBtu/ft <sup>2</sup> )	29.6	23.1	-6.5(-22.0%)
Energy Cost (\$)	15,549.25	14,809.83	-739.42(-4.8%)
Total GHG Emissions (Metric Tons CO <sub>2</sub> e)	76.3	59.2	-17.1(-22.4%)

**Check for Possible Data Errors**

Run a check for any 12-month time period to see if there are any possible errors found with your data.

[Check for Possible Errors](#)

# Benchmarking Your Building Using ENERGY STAR Portfolio Manager

## 2. Click **Add A Meter**.

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top, there are navigation tabs: MyPortfolio, Sharing, Planning, Reporting, and Recognition. A notification box states "Not eligible to apply for ENERGY STAR Certification". The ENERGY STAR Score (1-100) is shown as 96 (Current Score) and 92 (Baseline Score). Below this, there are tabs for Summary, Details, Energy, Water, Goals, and Design. The Energy tab is active.

**Meter Summary**  
 4 Energy Meters Total  
 2 - Used to Compute Metrics  
 2 - Not Used in Metrics  
[Add A Meter](#)  
 Current Energy Date: Dec 31, 2015  
[Enter Your Bills](#)

**Energy Use by Calendar Month**  
 A line chart showing Site Energy (kBtu) from Jul '11 to Jan '16. The Y-axis ranges from 0k to 60k. Two data series are shown: Propane (black line with circles) and Electric - Grid (blue line with circles). Propane usage is consistently low, around 10k kBtu. Electric - Grid usage fluctuates between approximately 20k and 40k kBtu. A legend at the bottom identifies the series: Propane and Electric - Grid.

[Export Data by Calendar Month](#)

**Meters - Used to Compute Metrics (2)**  
[Change Meter Selections](#)  
[View as a Diagram](#)  
[Add A Meter](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
<a href="#">Electricity Combined - 5693541</a>	Electric - Grid	04/05/2016	Yes
<a href="#">Resource Center Propane - 6037576</a>	Propane	01/31/2015	Yes

**Four Ways to Enter Bill Data**

1. Manually
2. Use our [simple spreadsheet](#) (one meter) to upload or Copy/Paste
3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)
4. [Find an organization](#) to electronically enter your data into Portfolio Manager

**Your Property is:** [Edit](#)

- A Single Building
- Part of a Building
- A Campus of Multiple Buildings

**You Are Tracking:** [Edit](#)

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

3. Select the sources of your property's energy and your property's water usage, identify the number of meters, and then click **Get Started!**

Welcome ATLANTA\_BBC1: Account Settings | Contacts | Help | Sign Out

### Get Started Setting Up Meters for Southface- Main Campus

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.

#### Sources of Your Property's Energy

How does your property acquire energy? Please select all that apply.

- Electric
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water

Don't see your energy sources?  
[See more energy sources?](#)

#### Your Property's Water Usage

How does your property use water? Please select all that apply.

- Municipally Supplied Potable Water
- Municipally Supplied Reclaimed Water
- Alternative Water Generated On-Site:
- Other:

#### Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an on-site solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

#### Entering Your Meters in Bulk

For advanced users, you may prefer to use the upload tool to [set up all of your meters with one click](#).

#### Automate Your Meter Entries

If you have a lot of meters, you may want to consider hiring an organization that exchanges data to automatically update your energy consumption. [Learn more](#).

**Get Started!** [Cancel](#)

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

- For each utility meter, assign a recognizable name, confirm the utility type, and select the appropriate units for consumption (i.e. electricity: kWh, natural gas: therms, water: CCF). Enter a **First Bill Date** that corresponds to the earliest bill entry that you would like to enter for the selected meter.

In naming meters (if there is more than one), it may be helpful to include the actual account or meter number or other descriptor that will enable you to identify it later. This is especially useful when transferring maintenance of the accounts to another person.

If the selected meter is no longer in use, click the checkbox under “**In Use?**” enter the last meter read date under **Last Bill Date**. For all meters that are presently in use, the **Last Bill Date** field should be ignored.

Some fuel types, such as fuel oil or propane, are typically delivered to a building rather than metered from a pipeline. The default option for these fuel types is to **Enter as Delivery**. For most utility types, the “**Enter as Delivery?**” field should be ignored.

If you would like to add additional meters (not bill entries), then click **Add Another Entry** and fill in the requisite information. Note that all meters do not need to be setup at once, and you can always add additional meters later. *If this is your first time, it is highly recommended that you setup only one meter.*

To delete a meter, click the checkbox next to the meter name and choose **Delete Selected Entries**.

- Click **Continue** after the details of the meter(s) have been completed to enter monthly bills.

### About Your Meters for Southface- Main Campus

Enter the information below about your new meters. The meter's units and first bill date are required. You can also change the meter's name.

**1 Energy Meter for Southface- Main Campus (click table to edit)**

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	First Bill Date	In Use?	Last Bill Date	Enter as Delivery?
<input type="checkbox"/>	Natural Gas	Natural Gas		therms	1/1/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>

[Delete Selected Entries](#)  
[Add Another Entry](#)

**0 Water Meter for Southface- Main Campus (click table to edit)**

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	First Bill Date	In Use?	Last Bill Date
--------------------------	------------	------	------------	-------	-----------------	---------	----------------

[Delete Selected Entries](#)  
[Add Another Entry](#)

[Cancel](#)

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

6. There are two options for inputting utility data: a) manual data entry or b) upload data from spreadsheet. Instructions for each option are detailed below.

### Manual Data Entry

1. Manually enter data for each billing period. This method works best if you are inputting data from physical copies of bills, inputting only a few bills, or making corrections to previous entries.
2. Select **Click to add an entry** to enter the first month of the bills for the meter. Click **Add Another Entry** to add a new row/bill. Add a new entry and input data until all bills have been entered for the selected meter.
3. The **Estimation** field should be ignored.

### Bill Entry Input Tips

- Ensure that the correct units are applied to the bill entries. Return to Step 4 to change the energy/water consumption units, if necessary.
- The billing period (i.e. duration between **Start Date** and **End Date**) cannot exceed 65 days.
- Billing periods should not overlap (e.g. **End Date** for Bill 1 is 05/01/2013. **Start Date** for Bill 2 needs to be 05/02/2013; not 05/01/2013).
- Bills can be entered in any order: ascending, descending, or random. If a bill is accidentally omitted, then you can input the missing bill as the last entry instead of repeating all bill entries.
- Utility cost information is strongly recommended because it enables ESPM to quantify the cost savings from your efforts.

Your Meter Entries for Southface- Main Campus

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 Southface- Main Campus

▼ Natural Gas [Edit](#)

<input type="checkbox"/>	Start Date	End Date	Usage	Cost	Estimation
<a href="#">Click to add an entry</a>					

[X Delete Selected Entries](#) [+ Add Another Entry](#)

You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#).

No file chosen

[Cancel](#)

## Upload Data from Spreadsheet

1. Click the **Choose File** button and browse for the completed template file stored on your computer.

### Using Spreadsheet Uploads

Spreadsheet templates allow you to quickly and easily upload data into Portfolio Manager using a few simple steps. You can upload data for a single meter, for multiple meters at one property, or for multiple meters across multiple properties.

#### Uploading Data for a Single Meter

Follow these steps to upload data for a single meter:

1. Click the **Meters** tab of your property, and then click **Manage/Enter My Bills**.
2. Select a meter from the drop-down menu on the **Manage Bills** page, and then click **Select Meter**.
3. Click spreadsheet template at the bottom of the page.
4. Save the spreadsheet file that loads in your browser, and then open it to enter meter information.
  - a. Enter "NO" in the **Estimated Value** column if you are entering an actual meter reading.
  - b. Enter "YES" in the **Estimated Value** if you are entering an estimated value.
  - c. When you are finished entering information, save the spreadsheet to your computer. **NOTE:** Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.
5. Click **Choose File** on the **Manage Bills** page (where you originally generated the spreadsheet). Browse for the completed template you saved on your computer, click **Open**, and then click **Upload**. Portfolio Manager then automatically enters the new meter entries for your property.

	A	H	G	D	F
1	Start Date	End Date	Usage	Cost	Estimated Value
2	1/1/2008	1/31/2008	7533	903.96	FALSE
3	2/1/2008	2/28/2008	8550	1028.98	FALSE
4	3/1/2008	3/31/2008	9137	1132.41	FALSE
5	4/1/2008	4/30/2008	10684	1283.28	FALSE
6	5/1/2008	5/31/2008	10352	1242.24	FALSE
7	6/1/2008	6/30/2008	11998	1439.76	FALSE
8	7/1/2008	7/31/2008	11509	1381.08	FALSE
9	8/1/2008	8/31/2008	500	1000	TRUE
10	9/1/2008	8/30/2008	10440	1252.8	FALSE
11	10/1/2008	10/31/2008	9063	1087.56	FALSE
12	11/1/2008	11/30/2008	8746	1049.4	FALSE
13	12/1/2008	12/31/2008	7827	915.24	FALSE
14					

\*\*Updated from "true/false" entries

#### Metering Configuration Tips

- Utilities that are submetered from a main utility meter should not be included in the energy metrics for the property, if the consumption for the main meter has been separately input. For example, cooling tower make-up water should not be included in the water use metrics for the property if it is submetered from the main meter.
- Energy or water generated onsite, if applicable.

#### Upload Tips

- Fill out all fields in each row in the upload spreadsheet in the same number format as the template (e.g. cost of 630; not \$630).
- Input "FALSE" for each entry in the **Estimated Value** field. Unless of course it is truly an Estimation, then input "TRUE"
- Do not paste or enter formulas into the upload spreadsheet. Copy data from another spreadsheet or source, then right click and choose "Paste Special" then select "Values Only".
- Use the meter upload template file from Portfolio Manager. Please note that a different template file is used for energy generated onsite (e.g. solar or wind).

ENERGY STAR® PortfolioManager®

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Your Meter Entries for [REDACTED]

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 [REDACTED]

▼ Gas [Edit](#)

<input type="checkbox"/>	Start Date	End Date	Usage	Cost	Estimation
<input type="checkbox"/>	4/1/2013	5/1/2013	20 therms	50	<input type="checkbox"/>

[X Delete Selected Entries](#)    
 You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#).    
  Trial Upload.xls    

   
  [Cancel](#)

2. After the file has been selected, the name of the file will appear to the right of the **Choose File** button. Click the **Upload** button to input the template data into the meter entry fields.
  - a. Many errors, such as the duplicate bill entry shown below, will be flagged as errors by Portfolio Manager; however, it is still easy to make a small mistake (e.g. add an extra zero) that have a large impact on your energy/water use. Review all bill entries, and then click the **Finish Meter Set Up** button when you are finished.

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## ENERGY STAR® PortfolioManager®

### Your Meter Entries for [redacted]

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 Southface- Main Campus**

▼ Gas [Edit](#)

<input type="checkbox"/>	Start Date	End Date	Usage	Cost	Estimation
<input type="checkbox"/>	04/01/2013	05/01/2013	20 therms	\$ 50	<input type="checkbox"/>
<input type="checkbox"/>	04/01/2013	05/01/2013	20 therms	\$ 50	<input type="checkbox"/>
<input type="checkbox"/>	05/02/2013	06/01/2013	20 therms	\$ 50	<input type="checkbox"/>

[Delete Selected Entries](#)

 You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#).
 

 No file chosen

[Cancel](#)

- Select the boxes of the meters that total your property’s energy and water use on the Meters to Add to Total Consumption page. Click **Apply Selections**.

#### Metering Configuration Tips

- Utilities that are submetered from a main utility meter should not be included in the energy metrics for the property, if the consumption for the main meter has been separately input. For example, cooling tower make-up water should not be included in the water use metrics for the property if it is submetered from the main meter.
- Energy or water generated onsite, if applicable.



MyPortfolio | Sharing | Planning | Reporting | Recognition

Congratulations! You have successfully added meters to your property.

### Meters to add to Total Consumption for Metrics for [REDACTED]

Tell us which meters to include when calculating the total usage for this property so that we can provide you with the most accurate metrics possible.

#### Property Totals

##### Energy Meters

Check the boxes for the meters that should be included in the energy metrics:


<input type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	Electricity - Combined
<input checked="" type="checkbox"/>	Resource Center- Propane
<input type="checkbox"/>	Gas

Total of 2 energy meter(s). Tell us what these meter(s) measure:

These meter(s) account for the total energy consumption for this property.  
 These meter(s) do not account for the total energy consumption for this property.

##### Water Meters

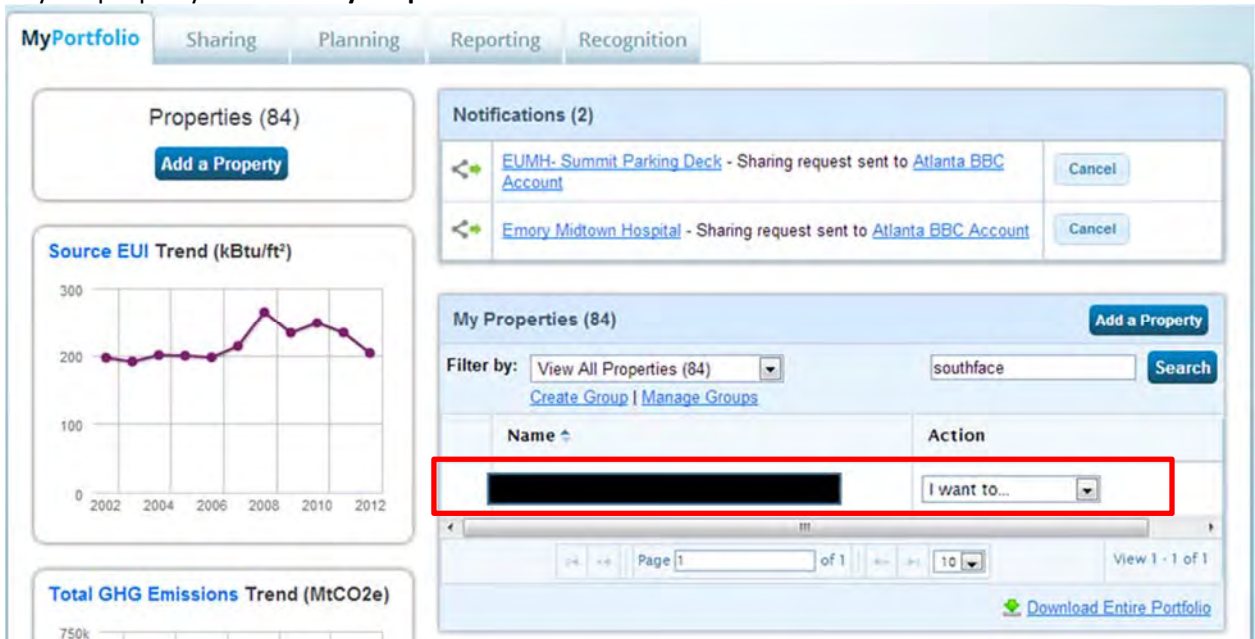
There are currently no water meters entered for this property/building. [Enter information about your water meters](#) to begin tracking water usage alongside your energy usage.

 Because of the wide variety of ways that people meter their properties, after you create meters for your property in Portfolio Manager, you must indicate which meters to use for your property metrics. In some cases, you will not want a meter to count for your metrics. For example, if you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

**Apply Selections** [Cancel](#)

## Set Baselines and Targets

1. Establishing a baseline and setting a target for improvement is a way to drive savings and to motivate all members of a building's community to participate in achieving improved building performance.
2. Select your property from the **My Properties** list.



3. Click on the **Goals Tab**.



## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

- The Current Baselines and Targets for your property will be displayed in the **Current Baselines & Target** section. By default, Portfolio Manager will select the earliest 12 months of energy/water data as the baseline period.
- It is recommended that the **Target** is set to “20% Better than Baseline”, since this is a goal many buildings are pursuing in Atlanta and across the nation, but the target can be any value you choose.

4. Click **Set Baselines or Target** to change the baseline or target.

The screenshot shows the 'MyPortfolio' interface with tabs for Sharing, Planning, Reporting, and Recognition. A notification states 'Not eligible to apply for ENERGY STAR Certification'. The 'ENERGY STAR Score (1-100)' is displayed as 'Current Score: 96' and 'Baseline Score: 92'. The 'Year Built' is 1996. The 'Water' tab is active, showing 'Energy Performance (kBtu/ft²)' with a bar chart comparing 'Baseline (Dec 2009)' and 'Current (Dec 2015)' for Source EUI and Site EUI. The 'Current Baselines & Targets' section lists: Selected Baselines (Energy: Not Set, Water: Dec 2010), Earliest Baselines (Energy: Dec 2009, Water: Dec 2009), Target (Target % Better than Median: 50%), and Design Target (Not Set). A red box highlights the 'Set Baselines or Target' button.

5. Set the baseline by selecting the billing period from the dropdown menu next to the **Select Baseline:** field. It is recommended that the baseline period is manually specified rather than selecting **Let Portfolio Manager automatically set my baselines**.

The screenshot shows the 'Baselines' section with 'Energy Baseline:' and 'Water Baseline:' fields. The 'Energy Baseline:' field has a dropdown menu set to '12/31/2009', which is highlighted with a red box. Below it are two radio buttons: 'Select a baseline: 12/31/2009' (selected) and 'Let Portfolio Manager automatically set my baselines'. An information box on the right, titled 'Selecting Baselines', explains that a baseline is made up of 12 full calendar months of property use information and is defined by selecting the last month in the year time frame.

6. Set the target by selecting **Target % Better than Baseline** from the dropdown menu for the **Target Metric** field. Input “20” into the **Target Value** field to aim for a 20% savings. Click **Save & Calculate Other Metrics** to save your selection and refresh the data in the table.

The information displayed in the table below is very useful for seeing where the performance of your property started (**Baseline**), where it is currently (**Current**), and the performance goal for 2020 (**Target**). The table also displays the energy use metrics for a median property (i.e. typical building of the same space-use, location, and space-attributes) as a point of reference.

7. Click **Save Baselines & Target** to finish.

### Target

Target Metric:

Target Value:  % (whole numbers)

**Save & Calculate Other Metrics**

Select "Calculate Other Metrics" to refresh the table after making changes to "Target Metric" and "Target Value"

Metric	Baseline (Dec 2009)	Current (Jun 2013)	Target*	Median Property*
ENERGY STAR score (1-100)	93	96	97	50
Source EUI (kBtu/ft²)	92.8	79.2	74.2	187.1
Site EUI (kBtu/ft²)	29.9	26	23.9	61.4
Source Energy Use (kBtu)	1332809.1	1137514.6	1066105.6	2688252.8
Site Energy Use (kBtu)	430208.5	374074.6	343395.2	882195.2
Energy Cost (\$)	15701.805080000002	15790.67112	12561.444064000001	37239.7713291408
Total GHG Emissions (MTCO <sub>2</sub> e)	75.2	64.3	60.16	151.641262

**Save Baselines & Target** [Cancel](#)

#### About Design Targets

On this page you can set a target for your property to track its progress after it has become operational. If your property is still in the design stage, you can use the design features to [set design targets](#).

---

#### If you are seeing "Not Available" ...

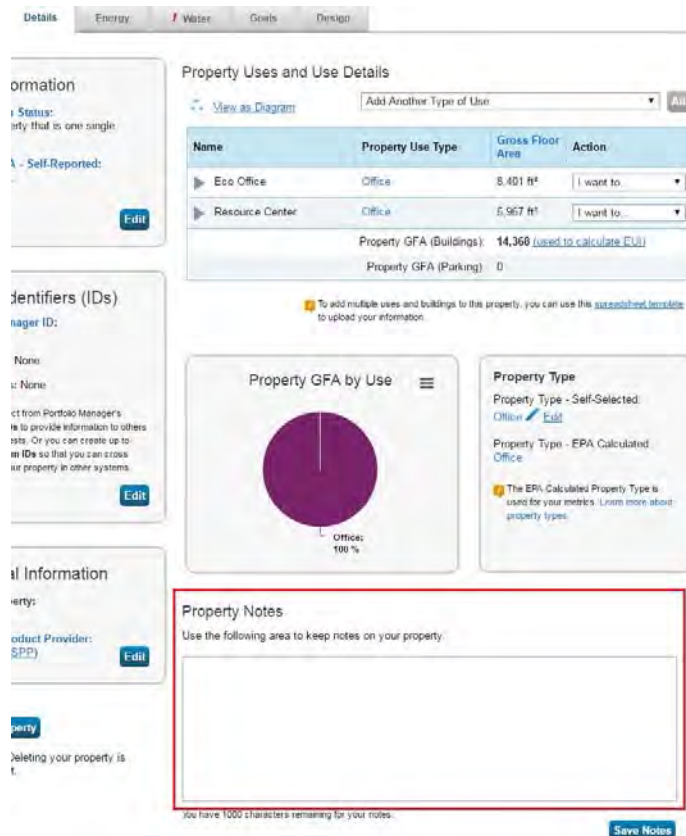
The Current and Baseline metrics (in the chart to the left) require 12 full months of energy consumption and property use information. The Target metrics may also require 12 months of data. Therefore, if you are seeing "Not Available", then there is not enough information available to calculate these metrics. Update your [meters](#) and/or [property use information](#).

8. A notification confirming the changes to baselines or target will appear on the **MyPortfolio Page**.



## Reporting: Data Quality Check

1. 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.
2. Run a data quality check. Click on the “Summary” tab for your property. Under “Data Quality for this Property”, click the “Check Data Quality” button. Run the check for the year ending “December 20XX.” The data checker will identify any potential problems in the data you entered.
  - A common first-time error is “Less than 12 Full Calendar Months of Bills.” Revisit the identified meter and make sure all of 20XX is covered, with no gaps.
  - For other common errors, you can check the Portfolio Manager FAQ at [portfoliomanager.energystar.gov/pm/help](http://portfoliomanager.energystar.gov/pm/help).
  - You can re-run the checker once you have made any necessary corrections. Once you are satisfied that you have addressed any errors, proceed to the next step.
3. Enter any contextual information about your building’s energy performance. Click on the “Details” tab and scroll down to “Property Notes.” You should enter here any relevant contextual information about your building that you want to be included when energy metrics are publicly disclosed.



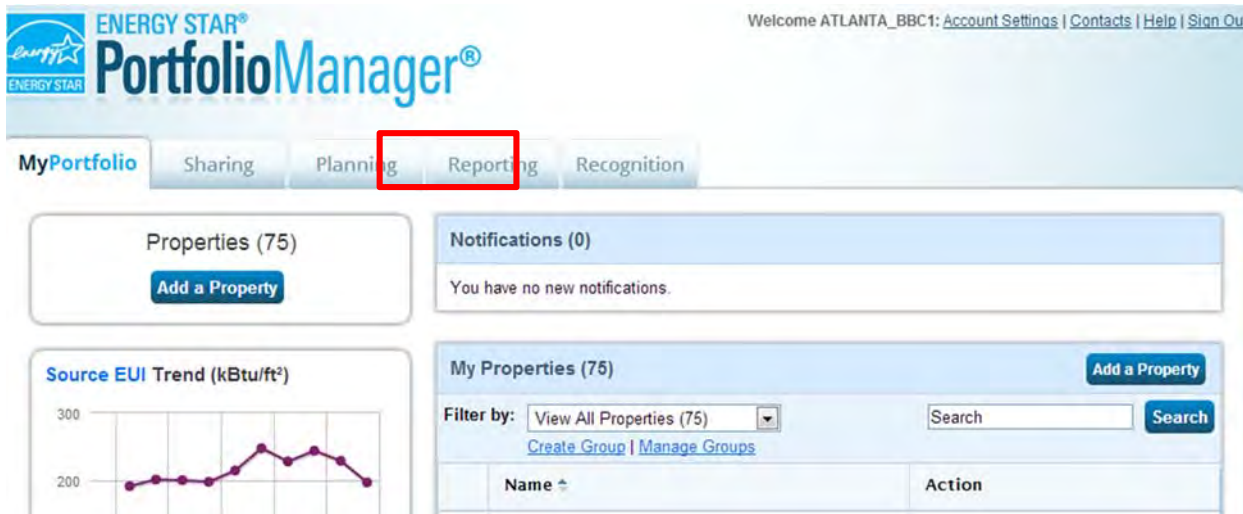
- The top of this same page provides information on your building’s energy performance. Many buildings will receive an ENERGY STAR rating, which is a percentile score for energy performance as compared to similar buildings in the U.S., after normalizing for operating hours, size, climate, etc. A score above 75 indicates a highly efficient building. However, this comparative dataset is not

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

available for all building types. Other users will see the building's weather normalized source energy use intensity, which is the energy consumption per square foot adjusted for weather. This estimates what energy use intensity would have been in a year with normal weather conditions.

## Reporting: View Results and Track Progress

1. 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.
2. Click the **Reporting** tab to view graphs and reports for a property or portfolio.



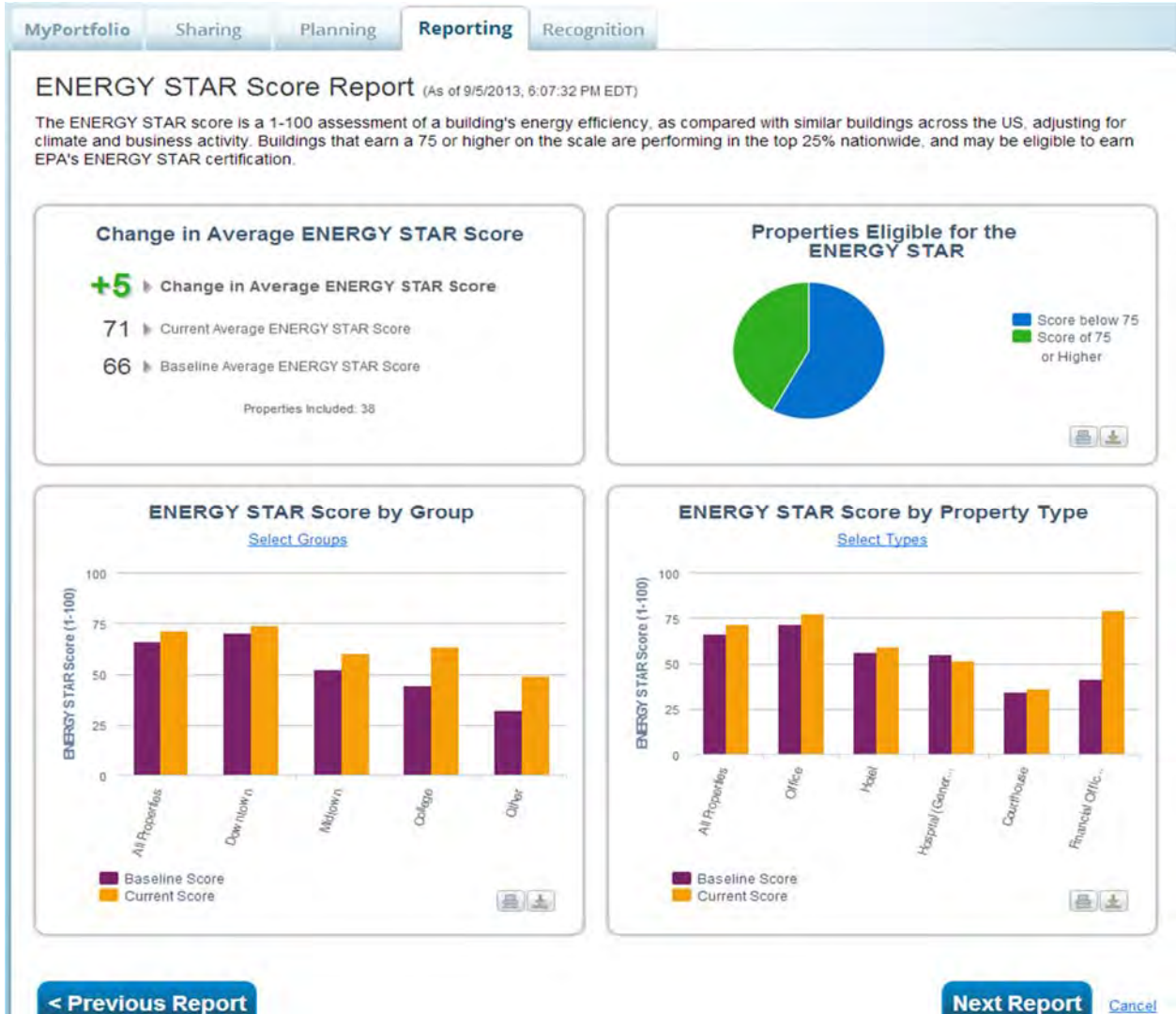
3. Click on the **Charts & Graphs** options to instantly see colorful graphs of how your portfolio or group of properties is performing. You can print graphs or download the images to incorporate into a presentation or document.
  - It is also possible to scroll through the available **Charts & Graphs** by holding down the left mouse button; though, it is much easier to scroll through the available **Charts & Graphs** from the next page—just click on the picture.



- The following metrics are displayed on the **Charts & Graphs Page** of the **Reporting Tab**:
  - a. ENERGY STAR Score
  - b. Source EUI
  - c. Site EUI
- The **Charts & Graphs** page for each of these metrics contains the following graphics:
  - a. Average Baseline Period Metric, Average Current Period Metric, and Change in Average Metric

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

- b. Eligibility for ENERGY STAR or Comparison to National Median
  - c. Metric by Group
  - d. Metric by Property Type
4. You can also print or download the graphics to incorporate into a presentation or document. The groups or types of buildings displayed in each chart can be edited by clicking the **Select Groups** or **Select Types** link.



- At the bottom of the **Charts & Graphs** page for each metric, there is a **Raw Data for these Charts & Graphs** section. The following tables are available for each metric:
  - a. Averages by group
  - b. Averages by property type
  - c. Averages by state
  - d. Complete reference table
- 5. Click on **Averages by Property Type** arrow to display the raw data.



Raw Data for these Charts & Graphs

▶ ENERGY STAR Score Averages by Group

▼ ENERGY STAR Score Averages by Property Type

36 Properties

Property Type	Number Of Properties	Average ENERGY STAR Score Baseline (1-100)	Average ENERGY STAR Score Current (1-100)	Total Baseline Square Footage (ft <sup>2</sup> )	Total Current Footage (ft <sup>2</sup> )
Office	28	71	77	15245160	15372653
Hotel	3	56	59	1903378	1907778
Hospital (General Medical & S	2	55	51	3342740	3342740
Courthouse	1	34	36	213272	213272
Residence Hall/Dormitory	1	52	59	167000	167000
Worship Facility	1	49	68	79234	79234

Export this dataset to: Excel

▶ ENERGY STAR Score Averages by State

▶ Complete Reference Table

- Click the **Previous Report** or **Next Report** to see other pre-defined Charts & Graphs.
- Return to the **Reporting Page** by clicking the **Reporting Tab**. There are 8 pre-defined report templates under the **Templates & Reports** section. A template is the framework for a report. A report must be generated from the template before you can view metrics about your properties.

Template Type

Each report template has an icon to the left of the **Name** field that indicates the type of report. The pre-defined reports have an icon that looks like a spreadsheet. Custom report templates have an arrow superimposed on the icon for the pre-defined reports, such as the icon shown for the **Utility Summary** report below.

Template Status

The **Status** for each report is displayed to the right of the **Name** field. The status for the template displays the time at which the last **Action** for that template was performed.

Template Action

The **Action** field for each template is drop-down list showing available actions. If no report has been previously generated, then the only available action is to **Generate New Report**. Once a report has been generated from the template, then additional actions will appear in the **Action** menu.

- Select **Generate New Report** for the **Energy Performance** template.

Templates & Reports (14) Create a New Template

Name	Status	Action
Utility Summary	Generated: 8/12/2013 12:04 PM	I want to...
Emissions Performance	No Report Generated	I want to...
Energy Performance	Generated: 9/09/2013 4:14 PM	View Current Report I want to...
ENERGY STAR Certification Status	No Report Generated	View Current Report Download Current Report in Excel Download Current Report in XML Generate New Report Select Properties and Timeframes
Fuel Performance	No Report Generated	I want to...
Partner of the Year Report	Generated: 9/09/2013 11:24 AM	I want to...
Performance Highlights	Generated: 8/02/2013 9:26 AM	I want to...
Sustainable Buildings Checklist Report	No Report Generated	I want to...
Water Performance	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.

- The next step in generating a report from the **Energy Performance** template is to define the details of the metrics displayed in the report.

Timeframe

The timeframe specifies the desired performance period and the performance period against which to compare. **Current Year** provides a report for the most recent 12 months.

Property to Include

These are the properties that will be included in your report. If **One Property** is selected, then another dropdown menu will appear with a list of your properties from which the desired property can be selected. If **All Properties** are selected, then a report will be generated for all properties in your portfolio. If **Multiple Properties** are selected, then a **Select Properties** button will appear that links to a checklist to select desired properties.

Review Included Metrics

This section displays a table of metrics that will be included in the report. Hover over the blue items for additional information. These metrics cannot be changed in a predefined template, but a new custom template can be created on the **Reporting** page if desired.

- Select **Compare Baseline Year** for the timeframe. Select **All Properties** for Selected Properties. Then, click **Generate Spreadsheet**.

## Create Energy Performance

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 of Information to Include

Timeframe: \* Current Year

Each property order for metric will be displayed

- Current Year
- Single Year
- Compare Two Years
- Compare Baseline Year
- Compare Current Year
- Current Year vs. Baseline Year

Complete year of data (12 full months) in metrics cannot be calculated, "N/A"

### 2 Select Properties

Properties: \* - Select Number of Property(ies) -

### 3 Review Included Metrics

Metric Category	Metric Name
Property ID Numbers	Portfolio Manager Property ID
Property Information	Property Name
Property ID Numbers	Portfolio Manager Campus Property ID
Property Information	Parent Property Name
Property Information	City
Property Information	State/Province
Property Information	Postal Code
Property Information	Property Floor Area (Building(s))
Energy Performance Metrics	Site EUI
Energy Performance Metrics	Source 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](#).

- A notification will appear on the **Reporting Page**. The newly generated report will be highlighted in green.

### 10. From the **Action** menu, select **View Current Report**.

#### View Report: Energy Performance

Date Generated: 09/09/2013 06:30 PM EDT

Number of properties in report: 2

The following displays the data generated from your [reports template](#). It includes the information and metrics that you selected for the properties you included. You may "Generate a New Report" to get updated information from the action menu for this report template.

Information and Metrics

Information and Metrics 2 records

Proper Id	Property Name	Year Ending	City	State/Provi	Post Cod	Property Floor Area (Building) (ft <sup>2</sup> )	Site EUI (kBtu/ft <sup>2</sup> )	Source EUI (kBtu/ft <sup>2</sup> )	Weather Normaliz Site EUI (kBtu/ft <sup>2</sup> )	Weather Normaliz Source EUI (kBtu/ft <sup>2</sup> )	Site EUI - Adjust to Current Year (kBtu/ft <sup>2</sup> )	Source EUI - Adjust to Current Year (kBtu/ft <sup>2</sup> )	N S E (ft)
3531232	Southface	06/30/2013	ATLANTA	Georgia	30308	14368	26.0	79.2	26.2	79.7	26.0	79.2	61
2246555	Technology	07/31/2013	Atlanta	Georgia	30308	210271	84.2	264.5	84.2	264.5	84.2	264.5	10

[Generate New Report](#) [Download Report](#) [Download XML](#) [Close](#)

## Benchmarking Your Building Using ENERGY STAR Portfolio Manager

- The Energy Performance Report will be displayed for all of your properties. This report can be downloaded as a spreadsheet by clicking the **Download Report** button or downloaded to XML via the **Download XML** button.

Your report "Energy Performance" 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



What are the average ENERGY STAR scores of my properties?

### ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [ENERGY STAR Score Card](#)

### Templates & Reports (8)

[Create a New Template](#)

Your new report(s) has been generated

- Note: "source energy" is what DOE uses in measuring % savings, so in order to be consistent, we recommend using "source" energy in reporting internally.

### Progress and Goals Reports

This report will generate a simple report to show how close a single property is toward its savings goal. This target is set by the owner of that account for a single year.

# Benchmarking Your Building Using ENERGY STAR Portfolio Manager

MyPortfolio | Sharing | Planning | Reporting | Recognition

## 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.

- 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)
- Select Property for Report(s)**

Property:
- Select Timeframe for Report(s)**

Timeframe:

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

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**ENERGY STAR® Progress & Goals Report**

# 96

**ENERGY STAR®  
Score<sup>1</sup>**

## Southface- Main Campus

**Primary Property Function:** Office  
**Gross Floor Area (ft²):** 14,366  
**Built:** 1996

**For Year Ending:** December 31, 2014  
**Date Generated:** June 17, 2015

**Property Address:**  
Southface- Main Campus  
241 Peach Street NE  
ATLANTA, Georgia 30308

**Property ID:** 3531232

<sup>1</sup> The ENERGY STAR score is a 1-100 assessment of a building's energy efficiency as compared with similar buildings nationwide, adjusting for climate and business activity.

Performance Comparison						
	Progress			Performance Goals		
	Year Ending 12/31/2009 (Baseline)	Year Ending 12/31/2014 (Selected)	% Change	Property's Target	National Median	ENERGY STAR Score of 75
<b>ENERGY STAR Score</b>	92	96	-4	93	50	75
<b>Energy</b>						
Site EUI (kBtu/ft²)	29.6	23.7	-19.9	27.3	54.7	40.4
Source EUI (kBtu/ft²)	92.4	73.4	-20.5	84.8	169.5	125.4
\$	15,549.25	15,636.54	0.56	18,053.58	36,107.16	28,654.68
\$/ft²	1.08	1.09	0.56	1.26	2.51	1.86
<b>Greenhouse Gas Emissions</b>						
Metric Tons CO2e/year	76.5	60.8	-20.52	70.2	140.4	103.6
kgCO2e/ft²/year	5.3	4.2	-20.52	4.9	9.8	7.2
<b>Water</b>						
All Water Consumption (kgal)	87.3	69	-20.96	-	-	-
Indoor Water Consumption (kgal)	87.3	69	-20.96	-	-	-
Indoor Water Consumption (kgal/ft²)	6.07	4.81	-20.96	-	-	-
\$	1,715.03	1,746.59	1.84	-	-	-

\*Setting and managing water targets is not yet available in Portfolio Manager.

## Frequently Asked Questions

### General Questions

#### How will my portfolio be affected?

Building owners will be able to take advantage of ENERGY STAR Portfolio Manager to quickly identify and track parts of portfolios that are struggling with energy performance, to compare building performance from year-to-year, and to benchmark buildings against the rest of the nation, controlling for operations and weather. Many may also discover that parts of portfolios are eligible for recognition and certifications, like ENERGY STAR. The impact on the portfolio will ultimately be determined by the opportunities for increased energy efficiency that each building owner chooses to pursue.

#### How much time will it take to benchmark a building?

The time varies based on an individual's familiarity with ENERGY STAR Portfolio Manager and having energy and water data on hand. There are two main methods of benchmarking using the software: manual or automatic upload.

### Special Issues

#### Which property uses should I select to represent my building?

Portfolio Manager has approximately 80 different property use categories. You should accurately represent all uses that are found within your building. A list of definitions is available at:

[www.energystar.gov/buildings/sites/default/uploads/tools/PropertyUseDetailsandDefinition.pdf](http://www.energystar.gov/buildings/sites/default/uploads/tools/PropertyUseDetailsandDefinition.pdf)

#### How is parking reported? How do I report standalone parking garages?

When parking is part of a building, it does not count towards gross floor area, since Portfolio Manager focuses on the energy use of the actual building interior. For example, if you have a building with 100,000 square feet of office space and 20,000 square feet of parking, you should enter a gross floor area of 100,000 square feet into Portfolio Manager. You may be prompted to enter information on parking area, but it will not count towards your gross floor area. We recommend reading the ENERGY STAR guidance here:

[portfoliomanager.supportportal.com/ics/support/KBAnswer.asp?questionID=15974](http://portfoliomanager.supportportal.com/ics/support/KBAnswer.asp?questionID=15974). (If you are submetering your parking areas and able to exclude their energy use, you may do so in your reporting.) *Standalone parking garages*: If you are reporting a standalone parking garage, EPA recommends that you select the "Other" building type when creating the building. Do not check off "My building's energy use includes parking areas." Instead, just enter the total area of the garage (i.e., including parking) as the area of the building. This will prevent any error messages from coming up as you continue.

#### How do I determine the gross floor area for a building or for a property use within the building?

Many building owners will have information on gross floor area from leasing, sale, or other transactional documents. Other buildings will have plans that can provide dimensions for the building and/or individual property uses. In conjunction, the gross floor area of common spaces and commercial condos can be estimated from building plans or measured. The calculation of gross floor area is a one-time step, necessary only in the first year of reporting. Any estimation of floor area must be noted in "Property Notes."

#### What if my building isn't fully occupied?

Report the percentage of the building that is occupied when you first create the building within Portfolio Manager. For office buildings with 10% or higher vacancy, see EPA's guidance here:

[portfoliomanager.supportportal.com/ics/support/KBAnswer.asp?questionID=34288](http://portfoliomanager.supportportal.com/ics/support/KBAnswer.asp?questionID=34288). You'll need to create an office use representing the vacant space, with zero operating hours, computers, and workers.

### **Are there any energy uses that are not part of my building's energy use?**

Cell phone towers, radio masts, and any external billboards used for leased advertising space are not part of building energy use, and may be excluded if submetered. If you are not using whole building data, and are submetering your parking areas, you may exclude parking area energy use since parking doesn't count towards the gross floor area of the building.

### **Are there any water uses that are not part of my building's water use?**

Only fire pipe/emergency water usage may be excluded from your building's water consumption.

### **What if I have multiple buildings on one lot, or multiple buildings that share meters?**

Some parcels have multiple buildings on them; other owners may have buildings in close proximity that share meters or systems. The metering set up will help you determine how to report these buildings:

*All the energy sources and water are separately metered by building.* Each building needs to be reported as a separate building.

*One or more energy sources or water is not separately metered by building.* For each type of energy or water use where this is the case, you need to apportion by square footage, as long as:

- The uses of the buildings are generally similar
- The vacancy rates of the buildings are generally similar

If these conditions are met, then apportion any shared usage by the square footage of the buildings, and mark the data as an "Estimation" when you enter the values into Portfolio Manager.

*It isn't appropriate to apportion shared energy or water use.* If the buildings don't meet the criteria for apportionment, report them in Portfolio Manager as a multi-building property. Or, if they're on one lot and have similar uses, report them as a single building in Portfolio Manager.

### **What is Source EUI? What is an ENERGY STAR score? How are they calculated?**

Energy use intensity (EUI) is the building's energy use per square foot. Portfolio Manager typically shows a building's Source EUI, which is a complete assessment of the fuel required for operating the building, accounting for any losses during the conversion of fuel to electricity and electric transmission and distribution. When you see Weather Normalized Source EUI, this is an estimate of what the Source EUI would have been in a year with "normal" weather conditions. For example, in a very hot year, Portfolio Manager might estimate your Weather Normalized Source EUI to be lower than your actual Source EUI.

ENERGY STAR score, or rating, is a percentile score, on a scale of 1-100, comparing your building's energy performance with that of similar buildings in the U.S. The score normalizes for climate, weather, building size, number of employees, and other operational factors. A score close to 100 indicates a very high-performing building.

### **What if my building doesn't receive an ENERGY STAR score?**

Only some building types will receive an ENERGY STAR score, due to limitations in the national comparative dataset.

### **How are data centers reported in Portfolio Manager?**

Portfolio Manager defines a data center as a space "specifically designed and equipped to meet the needs of high density computing equipment such as server racks." You can add a data center as a property use type. To receive an ENERGY STAR score for a data center, energy use must be measured at the output of the uninterruptible power supply. Data center energy use is reported as separate value in your energy and water report, so the data center does not affect your building's energy use intensity.

**Can I use data from an energy or building management system?**

Yes, if the system provides accurate whole-building data. Many such EMS or BMS can upload energy and water data directly into Portfolio Manager. As discussed in Step 7, you must note in “Property Notes” if you do not use utility-provided data, and an explanation of any difference.

**What if I generate electricity through on-site generation like solar panels?**

You can enter this into Portfolio Manager when setting up your meters. Obtain data from your installer on the energy used, any energy exported out to the grid, and about any renewable energy certificates generated. If you report your renewable energy generation and use accurately, it will be reflected in your building’s greenhouse gas emissions.

**Additional Resources**

For technical questions about Portfolio Manager, please consult the Portfolio Manager [Frequent Questions](#). The Portfolio Manager Knowledge Base continues to be updated, expanded, and refined as additional questions arise and software issues become apparent.