

PORTFOLIO MANAGER GLOSSARY

ACRONYMS & UNITS

Btu	British Thermal Unit (often used to express energy content of fuels)
EPA	United States Environmental Protection Agency
ESPM	ENERGY STAR® Portfolio Manager®
EUI	Energy use intensity
GFA	Gross floor area
HCF or CCF	Hundred cubic feet (unit for water consumption)
kWh	Kilowatt-hour (unit for electricity consumption)
MMTCO ₂ e	Million metric tons carbon dioxide equivalent
MTCO ₂ e	Metric tons carbon dioxide equivalent
therm	Unit of heat (unit for natural gas consumption)

KEY TERMS

BENCHMARKING

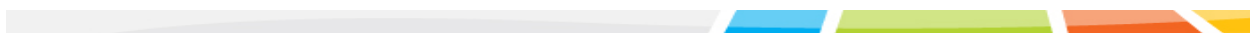
Benchmarking refers to comparing a building's energy performance to that of similar buildings or its own historic performance.

CONNECTED CONTACTS

Your "Connected" contacts are those that you've made a connection with through Portfolio Manager (similar to "Facebook friends"). Connections are necessary to share your properties with others (either individuals or organizations); you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on your list of connected contacts.

ENERGY STAR SCORE

The ENERGY STAR Score is a measure of how well your property is performing relative to similar properties, when normalized for climate and operational characteristics. The 1-100 scale is set so that 1 represents the worst performing buildings and 100 represents the best performing buildings. A score of 50 indicates that a building is performing at the national median, taking into account its size, location, and operating parameters. A score of 75



indicates that at a property is performing in the 75th percentile and may be eligible to earn [ENERGY STAR Certification](#). ENERGY STAR Scores are [available for many property types](#).

GROSS FLOOR AREA

The Gross Floor Area (GFA) is the total property square footage, measured between the principal exterior surfaces of the enclosing fixed walls of the building(s). This includes all areas inside the building(s) including supporting areas. GFA is not the same as rentable space, but rather includes all area inside the building(s).

Include in GFA: lobbies, tenant areas, common areas, meeting rooms, break rooms, atriums (count the base level only), restrooms, elevator shafts, stairwells, mechanical equipment areas, basements, storage rooms.

Do not include in GFA: exterior spaces, balconies, patios, exterior loading docks, driveways, covered walkways, outdoor playcourts (tennis, basketball, etc.), parking ([How to enter parking?](#)), the interstitial plenum space between floors (which house pipes and ventilation), crawl spaces.

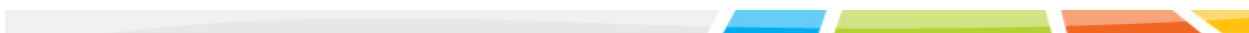
- **Although you do not include these areas in your GFA, you do include their energy use.** Our algorithms assume buildings have outdoor usage, too. The GFA refers specifically to interior space. But the energy use evaluated in our algorithms should be all energy required to operate your building, which includes the energy used both inside and out.

METRIC YEAR

A Metric Year is a 12-month period starting on the first day of one month, and ending 12 months later on the last day of that month (ex: 6/1/2013 – 5/31/2014). All metrics in Portfolio Manager are calculated based on *12 full calendar months of data*. The 12-month period associated with a given metric is often represented by the **Year Ending Date** which is the last day of the 12-month period. For example, if your **Year Ending Date** is 12/31/2012, your metrics would be based on the calendar year of 2012.

There are three particular Metric Years of interest for a property:

- **Baseline Year** is the 12-month period used as a historic point of comparison. Portfolio Manager will default your Baseline Year to the first 12-month period for which you have data. You can change it on the Goals tab. You can also set a different baseline date for energy and for water.
- **Current Year** is the most current 12-month period for which you have 12 full months of data. For example, if you update your bills every month, then your Current Year will always be the 12-months ending with most recent month that you entered your bills. A different Current Year is determined for energy and water, based on the most current meter data.
- **“Your Choice” Year** is a 12-month period which you select. For example, if you are running a report, you can select any 12-month period to view metrics. Or, if you are applying for ENERGY STAR Certification, you may have several different Years (each represented by the last day of that 12-month period) to choose from.



OCCUPANCY

Occupancy is the percentage of your property's Gross Floor Area (GFA) that is occupied and operational. For example, if you have a 10 story office building, that on average has 9 of its 10 floors fully leased and occupied, the occupancy would be 90%. There is only one Occupancy rate for each property as a whole.

You enter your Occupancy when you first create the property, and you can change it on the Details tab. Here are [instructions for what to do when your occupancy fluctuates](#).

PARKING

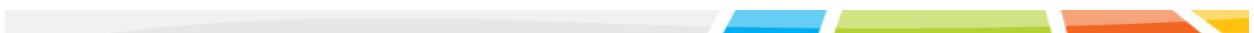
Parking refers to buildings and lots used for parking vehicles. This includes [open parking lots](#), [partially enclosed parking structures](#), and [completely enclosed \(or underground\) parking structures](#). Parking structures may be free standing or physically connected to the property.

PERMISSIONS

When you share a property, you determine the specific information that is shared and the specific actions that can be performed on the property. There are four permission levels:

- **Read Only Access** is the ability to view all information about your property, but not to make any additions or changes. For example, the person could view your energy usage but could not make corrections or add new energy bills. Read Only Access does NOT come with the ability to share the property with other people (Share Forward). If you want someone to be able to "Share Forward" but have Read Only Access to your meters and other information, you can make this selection under Custom Access.
- **Full Access** is the ability to view and edit your property. With Full Access, a person can do all of the same things you can, except delete the property. Full Access automatically comes with the ability to "Share Forward," which means the person with whom you share can also share that property with others. If you want someone to have Full Access to all the property data, but NOT be able to "Share Forward," then you need to share with Custom Access.
- **Custom Access** allows you to select more granular permissions for each person you are sharing with. First, you select None, Read Only, or Full Access for each type of data (Property, Meters, Goals, Recognition). By default, all selections are set to Read Only. If you want someone to be able to add meter bill data, you must select Full Access for that meter. If you want someone to be able to add new meters (or delete meters, edit information about your meters, or change the associations for your meter), then you need to select "Full Access" for Property Information. Choosing "None" will suppresses access to that specific tab, but annual metrics for the property are still accessible via Reporting. After you set permissions for viewing and editing your data, you decide whether you want to give "Share Forward" rights, meaning the ability to share the property with others.

Note that when you grant "Share Forward," the person cannot share with more permissions than they have. For example, if you select Read Only for every type of data (Property, meters, and certification) then the person can Share Forward, but can only grant Read Access, not Full Access, to your data.



- **Exchange Data** allows you to select an organization (which is registered to use web services) to exchange data with your Portfolio Manager account. You will be able to specify specific permissions regarding whether the organization will be able to view or modify Property, Building, and Meter information. Choosing "None" will suppresses access to that specific tab, but annual metrics for the property are still accessible via Reporting. You will also decide if you want to grant "Share Forward" rights, meaning the ability to share the property with others.

Note: When sharing to exchange data, you may also be required to provide additional information to the organization so that they can process your request to exchange data with Portfolio Manager.

PROPERTY DATA ADMINISTRATOR

The Property Data Administrator is the person who owns the account where the property was initially entered. We didn't call this person the "Property Owner" to avoid confusion with the person who "owns" the lease or deed to the building.

SITE ENERGY

Site Energy is the annual amount of all the energy your property consumes onsite, as reported on your utility bills. Use Site Energy to understand how the energy use for an individual property has changed over time.

Site Energy is available in a number of different formats. Please note that while site energy will correspond to your utility bill, you should take care when using Site Energy metrics in properties that use multiple fuel types. In this case, EPA recommends using Source Energy Use because it also includes losses that take place during generation, transmission, and distribution of the energy used at the building.

SOURCE ENERGY

Source Energy Use is the total amount of raw fuel that is required to operate your property. In addition to what the property consumes on-site, source energy includes losses that take place during generation, transmission, and distribution of the energy, thereby enabling a complete assessment of energy consumption resulting from building operations. For this reason, Source EUI is the best way to quantify the energy performance of commercial buildings. Use it to understand the complete energy impact of your property, and to compare the energy performance of properties across your portfolio. [Learn More](#)

WATER USE

Within Portfolio Manager you can track four water sources (alternative water generated on-site; municipally supplied potable water; municipally supplied reclaimed water; and other water sources). Each of these water sources can be tracked in one of three types of meters: Indoor, Outdoor, or Mixed (a meter that includes both Indoor & Outdoor). Each of the four types also has an Indoor Intensity metric, which is the indoor water use per square foot of the building in gal/ft².

