



ENERGY STAR®

# PORTFOLIO MANAGER® REFERENCE GUIDE

*For compliance with Port Ordinance 2844*

FEBRUARY 2017



**PORT of  
SAN DIEGO**

Prepared by the Center for Sustainable Energy for the Port of San Diego

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# COMPLIANCE WITH PORT ORDINANCE 2844



## 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 is a Requirement

On December 8, 2015, the Board of Port Commissioners adopted the Utility Usage Reporting Ordinance (Ordinance 2844) requiring all Utility Account Holders to report monthly utility usage data using Portfolio Manager. The required reporting of utility use is designed to help the Port of San Diego align with State of California greenhouse gas emissions reduction objectives and implement the goals of the Port's Climate Action Plan.

Access Portfolio Manager by visiting [portfoliomanager.energystar.gov](http://portfoliomanager.energystar.gov)

For questions regarding Portfolio Manager or Ordinance 2844, please email [TenantSupport@portofsandiego.org](mailto:TenantSupport@portofsandiego.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.

# Using Portfolio Manager

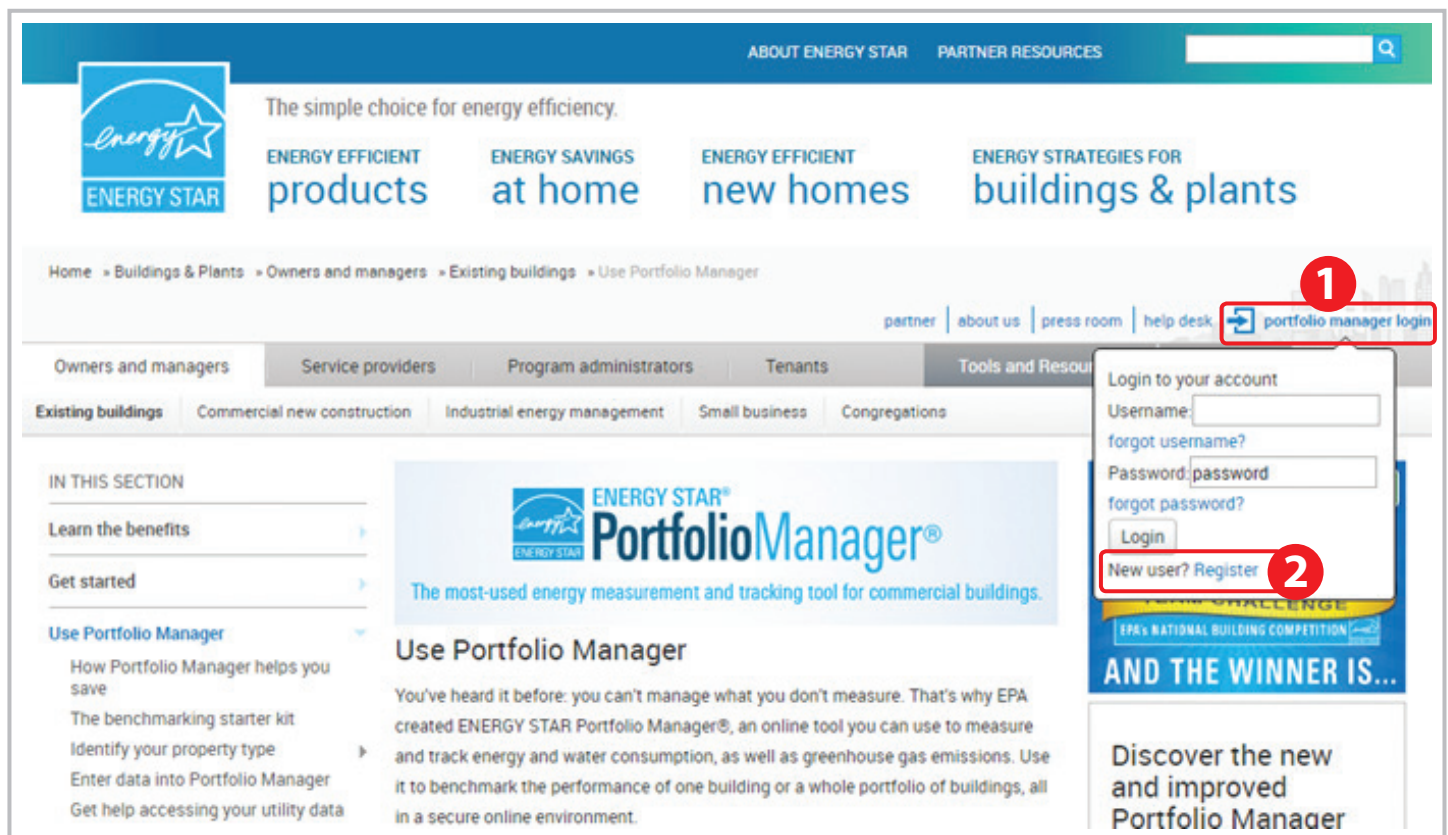
## 1) Creating a Portfolio Manager Account

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](https://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.

**Key Steps**

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



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.





## 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)

- 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 **MYPORTFOLIO** tab and a congratulations message will appear in a green box at the top of the page.

## 2) Adding Contacts to Your Portfolio Manager Account

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 adding contacts to your Portfolio Manager account.

### Adding Edison Energy as a Contact

As part of the compliance process with the Utility Usage Reporting Ordinance, Port Tenants and Subtenants are required to connect and share their property and meter information for reporting purposes with Edison Energy®, the third-party utility data aggregator for the Port of San Diego. No individual tenant utility data will be shared; the Port of San Diego will only receive aggregated data from Edison Energy.

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

**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 their accounts and sending a connection request.

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

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

### Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

**Your Search Criteria**

Name:

**Port Benchmarking Account**  
Port of San Diego with Edison Energy

**Connect**

Page 1 of 1

4. Within 5 minutes, Edison Energy will accept your connection request. Once the request is accepted, you will receive a notification on your Portfolio Manager home screen, which states, "You are connected to Port Benchmarking Account." Once you receive this notification, you may continue to the next step.

## Adding SDG&E as a Contact

While not required for compliance with the Utility Usage Reporting Ordinance, the Port recommends that you 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. The process for adding the SDG&E account is very similar to the process for connecting with SDG&E and is described below.

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 their accounts and sending a connection request.

**SDGE Benchmarking** **Search for new contacts**



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

The screenshot shows the 'Search Results' section of the Portfolio Manager interface. At the top, there are tabs for 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. Below the tabs, the 'Search Results' heading is followed by a paragraph explaining the search process. To the left, there is a 'Your Search Criteria' section with input fields for 'Name' (containing 'SDGE Benchmarking') and 'Organization'. To the right, there is a search result for 'SDGE Benchmarking' with a 'Connect' button highlighted by a red rectangle. Below the search result, there are pagination controls showing 'Page 1 of 1' and a '50' items per page dropdown.

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.

### 3) Adding a Property

To get started, log in to Portfolio Manager at [portfoliomanager.energystar.gov](https://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 **MYPORTFOLIO** tab.


The screenshot shows the 'MyPortfolio' tab selected in the Portfolio Manager interface. Below the tabs, there is a section titled 'Properties (14)' with an 'Add a Property' button highlighted by a red rectangle.

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**.

## 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?


Office

[Learn more about Property Types.](#)



**Tip**

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?



**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.



### 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



## 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**.

## 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?

1. 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.
2. 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.
3. 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.
4. Once you have added all of your use details for your property, click **ADD PROPERTY**.

[More on this rule.](#)

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

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

[Back](#)

[Add Property](#)

[Cancel](#)

5. 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.
6. 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.

## 4) Sharing Your Property with Edison Energy

Sharing your property with Edison Energy, the Port’s data aggregator, is required for compliance with the Utility Usage Reporting. Follow the instructions below to share your property with Edison Energy.

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 **Port Benchmarking Account (SDPort-EdisonEnergy)**.
4. Select the **PERSONALIZED SHARING & EXCHANGE DATA** option to allow for data exchange and click Continue.
5. Select permissions for Edison Energy by clicking the **EXCHANGE DATA** radio button.

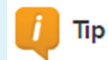


### Properties with Multiple Use Types

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.



### 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.



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Select Access Permissions to [Test Property 1](#) for [Port Benchmarking Account](#).

The following information is required by [Port Benchmarking Account](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

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

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
▼ All Meter Information			
▼ Energy Meters			
01234567	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Recognition	<input type="radio"/>		<input checked="" type="radio"/>

**Additional Options:**

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

**Apply Selections & Authorize Exchange** [Cancel](#)

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

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.

4

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
<span>Test Property 1 (5238126)</span>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
<span>Port Benchmarking Account</span>	<input type="radio"/>				<input checked="" type="radio"/> <a href="#">Edit</a>

NEW 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



## 5) 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](https://portfoliomanager.energystar.gov). Then, follow these instructions.

### Setting Up Meters

1. Click on your property from the **MYPORTFOLIO** tab; then, select either the **ENERGY** or **WATER** tab.
2. Click **ADD A METER** on the right-hand side of the page.

The screenshot shows the 'MyPortfolio' interface for 'Test Property 1' at 123 Main Street, San Diego, CA 92101. The 'Energy' tab is selected and highlighted with a red box. On the right, the 'Weather-Normalized Source EUI (kBtu/ft²)' section shows 'Current EUI: N/A' and 'Baseline EUI: N/A'. Below the tabs, the 'Meter Summary' box indicates '0 Energy Meters Total' and includes an 'Add A Meter' link. The 'Meters - Used to Compute Metrics (0)' section also features a red-outlined 'Add A Meter' button. A message box states: '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.' A link to 'How to get Utility Data into Portfolio Manager' is provided at the bottom of the message box.

3. Select the type of energy or water used.
  - In most cases, for energy, you will mark "electricity" and possibly "natural gas."

- 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:*

<b>Electric</b>	kWh (1,000 watt-hours)
<b>Natural gas</b>	therms
<b>Water</b>	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.



- 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](#)

## 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

- Click **ADD ANOTHER ENTRY** under the meter.
- Using your utility bills, enter the start and end dates of your bills, the total usage information and cost (not required).
- If you are unsure of the values on the bill, you can check the "Estimation" box to flag the entry for later review.
- 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.
- 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.



- 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"/>

[X 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

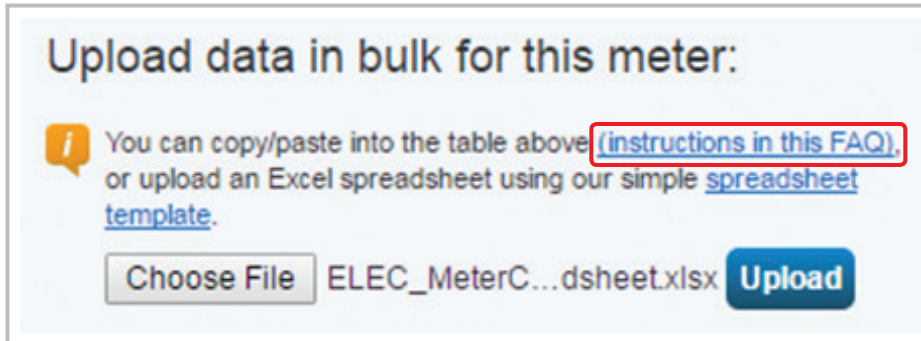
Back

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).



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 6, "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)."

Your meter entries have been added to your meters!

### Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for [Test Property 1](#) so that we can provide you with the most accurate metrics possible.

#### Summary

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

#### About Sub-meters

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.](#)

#### Energy Meters

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

<input type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	<a href="#">01234567</a> 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](#)





## Tips & Tricks

## Sharing Your New Meters with Edison Energy

When you create new meters, you will be prompted to update your sharing permissions for Edison Energy. This is required for compliance with the Utility Usage Reporting Ordinance. Follow the steps below to share your newly created energy and water meters with Edison Energy.

1. Click the button under **Full Access** for each meter you created in the table shown for Port Benchmarking Account.
2. Click **APPLY SELECTIONS** and **AUTHORIZE EXCHANGE**.
  - You will receive a congratulations message saying, "Congratulations! You have successfully added, associated and shared meters to your property(ies)."
  - You should now see a graph of consumption by calendar month.



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.

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

### Share Additional Meters with Web Services Provider

You have successfully created additional meters for your property. We notice that your property is shared with companies that exchange data directly through Portfolio Manager web services. If you want these companies to be able to access/edit your new meters, you must share these meters directly with them. If you do not wish to grant access to this meter, please select "None" as the permissions level and the meter(s) will not be shared at this time. To share in the future you will need to select "Edit Contact's Permissions" from the Sharing table on the Summary tab for your property.

Select the permission levels you would like to grant each web services provider below:

#### Port Benchmarking Account

The following information is required by [Port Benchmarking Account](#) in order to provide service to your property(ies). If you have questions about how to complete this information, please contact them directly.

Meter Name	None	Read Only	Full Access
01234567	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

**Apply Selections and Authorize Exchange**

[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)

## 6) Sharing Your Property and Meters with SDG&E

While not required for compliance with the Utility Usage Reporting Ordinance, the Port recommends that you connect with SDG&E for automatic upload of your energy meter consumption data into Portfolio Manager. Once you have added SDG&E as a contact (see Step 2, “Adding Contacts to Your Portfolio Manager Account”), 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 **METERS** tab.
3. Next to the meter you are changing, click the drop-down menu and select **EDIT BASIC METER INFORMATION**.
4. In the **NAME** field, enter ONLY the eight-digit meter number beginning with 0 (if you have a seven-digit number, add a 0 in the beginning).
5. Click **SAVE**.

#### About Your Meters for Test Property 1

Enter the information below about your new meters. The meter's **Units** and **Date Meter became**

##### 2 Energy Meters for Test Property 1 (click table to edit)

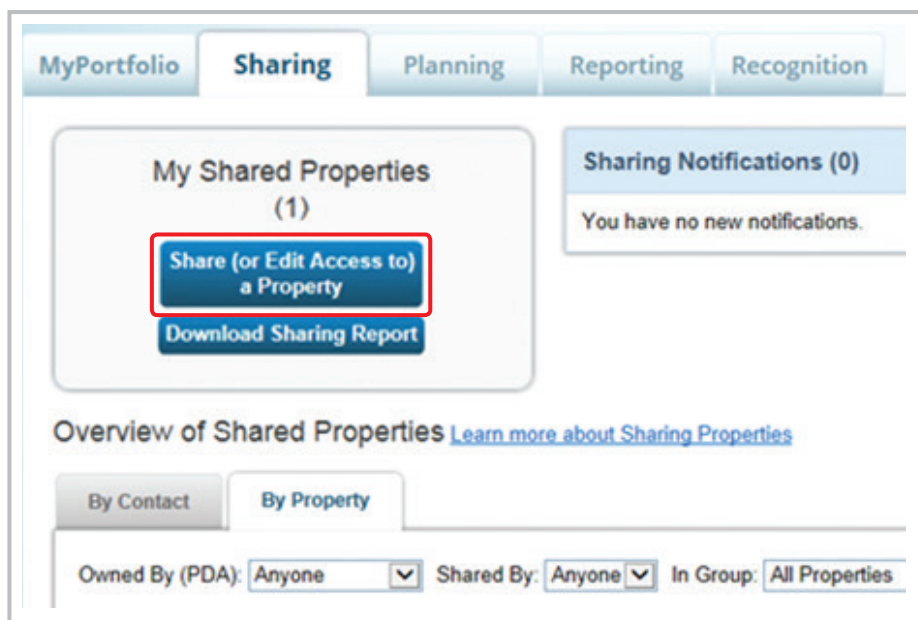
<input type="checkbox"/>	Meter Name	Type	Other Type	Units
<input type="checkbox"/>	01234567	Electric - Grid		kWh (thousand Watt-hours)
<input type="checkbox"/>	01234567	Natural Gas		therms

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

## 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)**.
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.



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.

4

### 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
<div>Test Property 1 (4971562)</div> <div>SDGE Benchmarking</div>					

Share Property(ies)

Cancel

NEW

### 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.

- 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.

Select Access Permissions to [Test Property 1](#) for [SDGE Benchmarking](#).

The following information is required by [SDGE Benchmarking](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

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 <sup>1</sup>	Last Bill Amount <sup>2</sup>
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"/>		

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

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

Additional Options:

Item	Yes	No
<p>* <b>Share Forward</b> 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.</p>	<input type="radio"/>	<input type="radio"/>

**Apply Selections & Authorize Exchange**

[Cancel](#)



## 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)."

**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"/>

**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

Once your account has both your water and energy consumption data for the mandatory reporting period, you will have completed all steps required for compliance with Ordinance 2844. Edison Energy will review your information to confirm that you have completed these steps successfully or if additional information or corrections are needed. You may be contacted if corrections or more information is required.

Please keep in mind that you will need to manually enter data in future years if you have a water meter or have chosen manual entry for your energy data.

Thank you for participating in the data aggregation program!

# ADDITIONAL RESOURCES (NOT REQUIRED FOR COMPLIANCE)

## 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](http://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.

The screenshot shows the 'Reporting' tab in the Portfolio Manager interface. At the top, there are navigation tabs: 'MyPortfolio', 'Sharing', 'Planning', 'Reporting' (selected), and 'Recognition'. Below the tabs, the main content area is divided into three sections:

- Section B (Charts & Graphs):** This section features a large blue square with a white circle containing a building icon. Below this, there are several smaller icons representing different energy metrics: a green square with a lightning bolt, a green square with a water drop, and a purple square with a gear. The text 'Indoor Water Intensity' is displayed below the icons, followed by the question 'How much indoor water do I use on a per square foot basis?'.
- Section C (ENERGY STAR Performance Documents):** This section is a white box with a red border. It contains a list of five documents, each with a small icon and a link: 'Statement of Energy Performance (SEP)', 'Statement of Energy Design Intent (SEDI)', 'Data Verification Checklist', 'Progress & Goals Report', and 'ENERGY STAR Score Card'.
- Section A (Templates & Reports (8)):** This section is at the bottom of the page. It has a red border and a 'Create a New Template' button. Below the button is a table with three columns: 'Name', 'Status', and 'Action'.

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: \* Baseline Year

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

### 2 Select Properties

Properties: \* One Property Test Property 1

### 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](#).

6. 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.
7. 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: #d9e1f2; padding: 2px;">I want to...</div> <div style="background-color: #d9e1f2; padding: 2px;">I want to...</div> <div style="background-color: #0070c0; color: white; padding: 2px;">View Current Report</div> <div style="background-color: #0070c0; color: white; padding: 2px;">Download Current Report in Excel</div> <div style="background-color: #d9e1f2; padding: 2px;">Download Current Report in XML</div> <div style="background-color: #d9e1f2; padding: 2px;">Generate New Report</div> <div style="background-color: #d9e1f2; 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

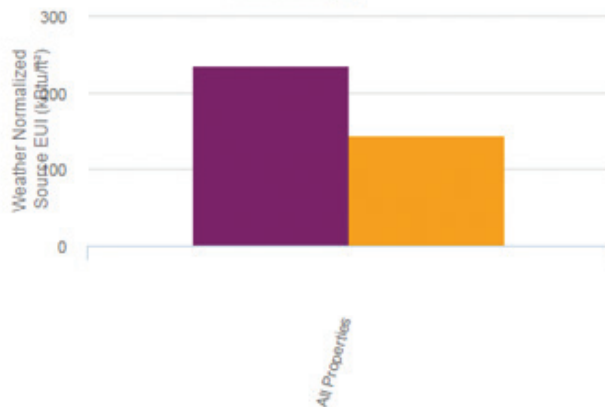
### Your Properties Compared to the National Median Source EUI



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

### Weather Normalized Source EUI by Group

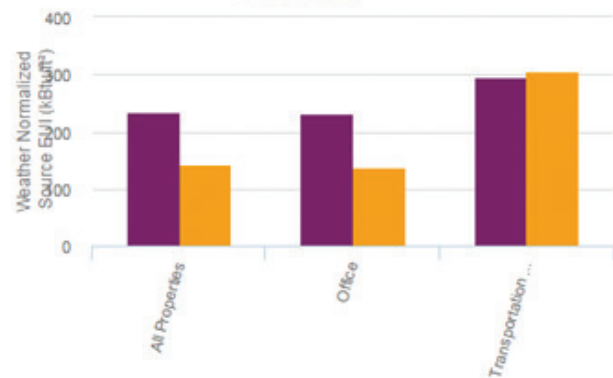
[Select Groups](#)



■ Baseline Weather Normalized Source EUI  
■ Current Weather Normalized Source EUI

### Weather Normalized Source EUI by Property Type

[Select Types](#)



■ Baseline Weather Normalized Source EUI  
■ Current Weather Normalized Source EUI

[< 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: Test Property 1 ▼

### 3 Select Timeframe for Report(s)

Timeframe: Baseline Year ▼

### 4 Select Contacts for Report(s)

Select Property Contacts:

Primary Contact: CSE Benchmarking (CSE Ber ▼ [Add Contact](#)

Property Owner: Center for Sustainable Energy ▼ [Add Organization](#)

Verifying Professional: CSE Benchmarking (CSE Ber ▼ [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.

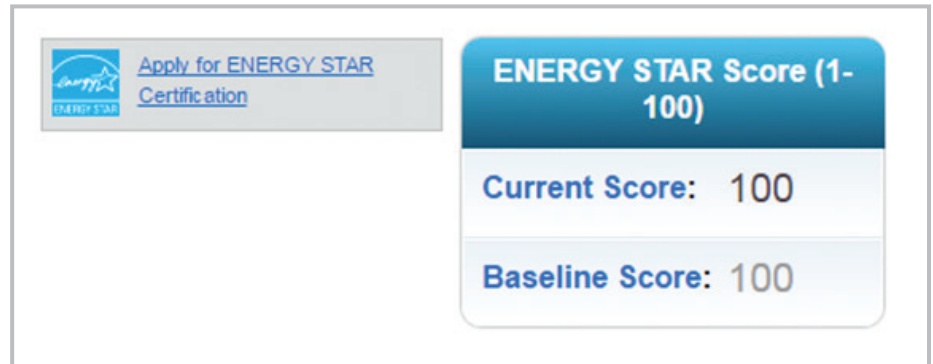
Bank Branch	Multifamily Housing
Courthouse	Non-Refrigerated Warehouse
Data Center	Office
Distribution Center	Refrigerated Warehouse
Financial Office	Retail Store
Hospital	Senior Care Community
<i>(General Medical &amp; Surgical)</i>	Supermarket/Grocery Store
Hotel	Wholesale Club/Supercenter
K-12 School	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)*

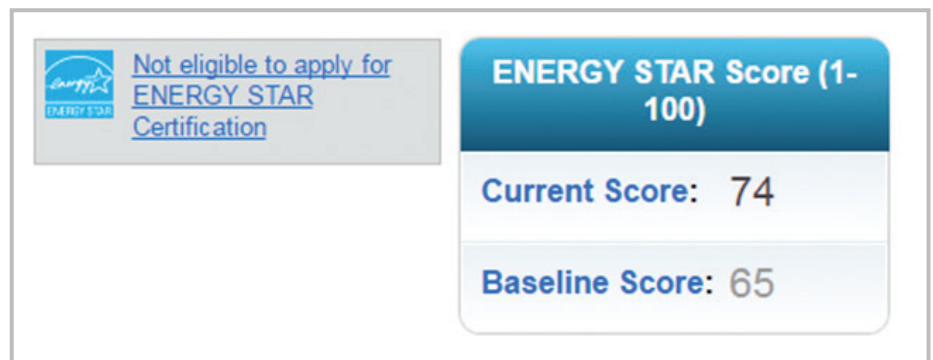
## Application Process

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.



- 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.



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 ft²	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

Office:  
100 %

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.

Portfolio Manager Reference Guide

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## Additional Resources

Please visit these links for additional help and support.

### *Port of San Diego Resources*

More information on the Port's ordinance is available on the Green Port website: [www.greenportnetwork.org/utility-usage-reporting](http://www.greenportnetwork.org/utility-usage-reporting).

Additionally, if you have any questions regarding the Port's ordinance, or ENERGY STAR Portfolio Manager, please contact Tenant Support at [TenantSupport@portofsandiego.org](mailto:TenantSupport@portofsandiego.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"><li>• Extensive list of FAQs</li><li>• Online form to submit technical questions or comments</li></ul>	<a href="http://www.energystar.gov/buildingshelp">www.energystar.gov/buildingshelp</a>
<ul style="list-style-type: none"><li>• Additional Portfolio Manager training resources available at:<ul style="list-style-type: none"><li>– Step-by-step documents (PDF)</li><li>– Access to recorded trainings and short videos</li><li>– Information on upcoming trainings</li></ul></li></ul>	<a href="http://www.energystar.gov/buildings/training">www.energystar.gov/buildings/training</a>
<ul style="list-style-type: none"><li>• Register for regular webinars</li></ul>	<a href="http://esbuildings.webex.com">http://esbuildings.webex.com</a>
<ul style="list-style-type: none"><li>• Portfolio Manager Technical Reference Series</li></ul>	<a href="http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_model_tech_desc">http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_model_tech_desc</a>
<ul style="list-style-type: none"><li>• Guidance on ENERGY STAR certification</li></ul>	<a href="http://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/earn-recognition/energy-star-certification">http://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/earn-recognition/energy-star-certification</a>
<ul style="list-style-type: none"><li>• Full listing of all available property types and associated use details</li></ul>	<a href="https://www.energystar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details">https://www.energystar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details</a>

# APPENDIX A. 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).

## Special Situations

### *Marinas*

If you have a marina on your property, we recommend you benchmark your property as a campus. Download the How to Benchmark Your Property as a Campus guide here: <https://www.energystar.gov/sites/default/files/tools/How%20to%20Benchmark%20a%20Campus.pdf>.

The parent **Property Type** should be OTHER. Any meters that service the entire property would be entered at this level.

The “child” properties should be broken into your number of physical buildings, as well as a separate property to categorize your shore power usage (docks). For example, if you have three separate buildings and docks, you would have four child properties (one for each building and one for the docks). Building-level meters would be added to the appropriate child property. If more than one building shares a meter, add that meter to the parent property level.

The docks property should be categorized as “Transportation/Terminal Station.” The other child properties should be categorized as whichever category applies to the majority of your square footage (e.g., office, strip mall, hotel).

### *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.

### 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
Year Built:	1970		
Property consists of:	1 building		

Edit

Add Another Type of Use Add

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.

## Common Property Types

A variety of property types exist on Port Tidelands, from small retail stores to large industrial facilities. The list below highlights the common types.

- Food Sales
- Food Service
- Hotel
- Manufacturing/Industrial
- Museum
- Non-Refrigerated Warehouse
- Office
- Other (*for parent properties with docks as a child property*)
- 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: <https://www.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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SAN DIEGO



LOS ANGELES



OAKLAND



BOSTON