



ENERGY STAR Portfolio Manager Training

What can Portfolio Manager do?

May 23, 2019

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Agenda

- About Portfolio Manager
- Program Structure & Terminology
- Property Data Entry
- Correcting & Updating Property Details
- Bulk upload of Multiple Utility Accounts & Bills
- Establishing Goals in Portfolio Manager
- Generating Reports in Portfolio Manager
- Creating a Portfolio Manager Account

What is Portfolio Manager?

- Developed by EPA and DOE as part of ENERGY STAR Program
- Online energy and water tracking tool

Basic Meter Information

Monthly Entries

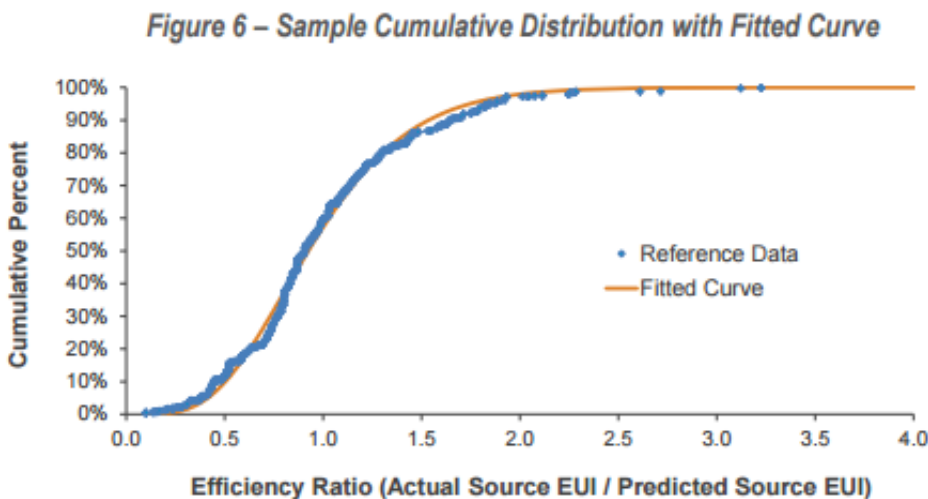
Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	2018	2019
<input type="checkbox"/>	1/1/2018	2/1/2018	134,959	13,863.03	<input type="checkbox"/>	<input type="checkbox"/>	666
<input type="checkbox"/>	2/1/2018	3/1/2018	211,697	17,255.72	<input type="checkbox"/>	<input type="checkbox"/>	695
<input type="checkbox"/>	3/1/2018	4/1/2018	196,982	16,693.17	<input type="checkbox"/>	<input type="checkbox"/>	702
<input type="checkbox"/>	4/1/2018	5/1/2018	233,502	18,303.16	<input type="checkbox"/>	<input type="checkbox"/>	684
<input type="checkbox"/>	5/1/2018	6/1/2018	258,846	19,853.99	<input type="checkbox"/>	<input type="checkbox"/>	791
<input type="checkbox"/>	6/1/2018	7/1/2018	287,400	21,454.97	<input type="checkbox"/>	<input type="checkbox"/>	837



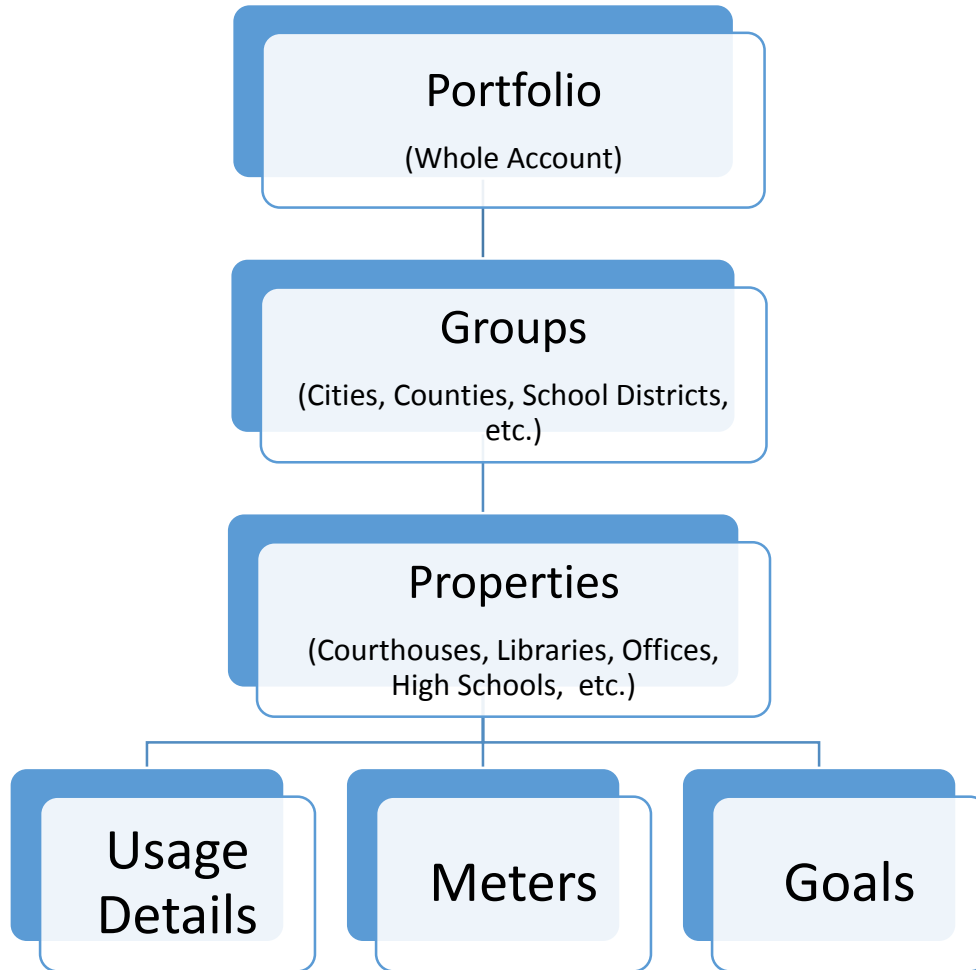
What does Portfolio Manager do?

- Compares to national database (CBECS) of buildings of similar type, climate, usage, etc.
- Benchmark score of 1 (lowest performing) to 100 (highest performing)
- Scores above 75 may be eligible for ENERGY STAR building label



Source: Energy Star Portfolio Manager
Technical Reference – Energy Star Score.

Portfolio Manager Structure



MyPortfolio Main Page

Welcome Account | Notifications ¹³⁰ | ENERGY STAR Notifications | Contacts | Help | Sign Out

TEXASENERGY: Settings

MyPortfolio | Sharing | Reporting | Recognition

Properties (137) [Add a Property](#)

Manage Portfolio

- [Transfer ownership](#) of a property that you manage to another Portfolio Manager user.
- [Upload and/or update multiple properties](#) at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.
- [Download your entire portfolio to Excel](#) or create a [custom download](#).
- [Set a portfolio baseline and/or target](#) to help measure progress.
- [Add sample properties](#) to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.

Dashboard (Metrics current as of 04/24/2019 05:51 PM EDT) [Search by ID or Name](#)


ABC Sample Group (5) | Energy Highlights | [Refresh Metrics](#)

[Add/Edit/Delete Groups](#) | [Add/Edit/Delete Views](#)

Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft ²)	Source EUI (kBtu/ft ²)
ABC Agency Admin Offices 4807467	12/31/2016	55	48.1	126.0
Building A 4807466	12/31/2016	56	45.5	127.5
Building B 4807462			84.0	151.8
Building C 4807461	12/31/2016	NA	22.7	59.8
Building D 4807463	12/31/2016	41	61.9	165.9

First Previous Page 1 of 1 Next Last 100 View 1 - 5 of 5 [Download Data Table](#)

Property Main Page



Welcome Account | Notifications 130 | ENERGY STAR Notifications | Contacts | Help | Sign Out

MyPortfolio Sharing Reporting Recognition

ABC Agency Admin Offices

2016 Presidential Way, Spurious, TX 77777 | [Map It](#)

Portfolio Manager Property ID: 4807467

Year Built: 1985

[Edit](#)

Not eligible to apply for ENERGY STAR Certification

ENERGY STAR Score (1-100)

Current Score: 55


Baseline Score: 38

[Change Metric](#)

Summary
Details
Energy
Water
Waste & Materials
Goals
Design

[Refresh](#) to see **Source EUI Trend**

[Change Metric](#)



[Change Metrics](#)
[Change Time Periods](#)

Metric	Dec 2015 (Energy Baseline)	Dec 2016 (Energy Current)	Change
ENERGY STAR Score (1-100)	38	55	17.00 (44.70%)
Source EUI (kBtu/ft ²)	157.5	126.0	-31.50 (-20.00%)
Site EUI (kBtu/ft ²)	60.1	48.1	-12.00 (-20.00%)
Energy Cost (\$)	40,992.11	32,793.69	-8198.42 (-20.00%)
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	7.5	6.0	-1.50 (-20.00%)
Water Use (All Water Sources) (kgal)	Not Available	7,205.7	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Current Score Dashboard

Property Info

Benchmarks Summary

Property Details

Update Property Use Details




It is important to keep the information about how your property is used up to date since this information is used to calculate your performance metrics. Updates that you make here are tracked as part of the [History Log](#). To correct an error that you find, use the [History Log](#). Note: you do not need to provide any new information for details you aren't updating.

Property Use Name: *

Type of Use:

Hover Over for Description

Can use placeholder default value based on national average. NOTE: real values give more accurate scores; real values required for awards

Detail	Current Value	Updated Value	Current As of
★ Gross Floor Area	20123 Sq. Ft. (as of 01/01/1985)	<input type="text"/> Sq. Ft. ▾	<input type="text"/>
★ Weekly Operating Hours	65 (as of 01/01/1985)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>
★ Number of Workers on Main Shift	46.2829 (as of 01/01/1985)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>
★ Number of Computers	40.246 (as of 01/01/1985)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>  <input type="checkbox"/>
Percent That Can Be Heated	50 % or more (as of 01/01/1985)	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text"/>  <input type="checkbox"/>
★ Percent That Can Be Cooled	50 % or more (as of 01/01/1985)	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text"/>  <input type="checkbox"/>

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

Property Meters

Summary Details **Energy** Water Waste & Materials Goals Design

Meter Summary

3 Energy Meters Total

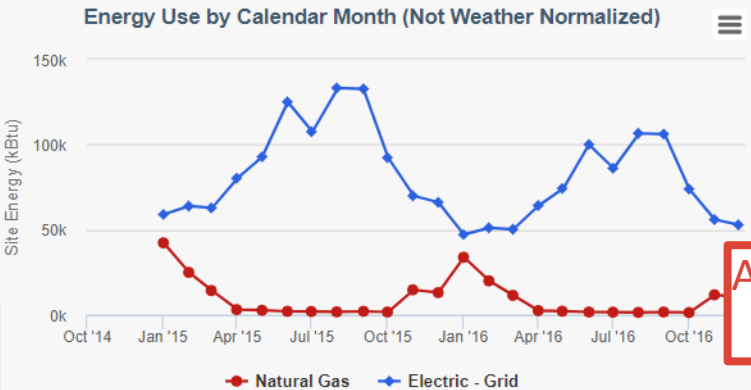
3 - Used to Compute Metrics

[Add A Meter](#)

Current Energy Date
Dec 31, 2016

Enter Your Bills

Energy Use by Calendar Month (Not Weather Normalized)



Site Energy (kBtu)

Oct '14 Jan '15 Apr '15 Jul '15 Oct '15 Jan '16 Apr '16 Jul '16 Oct '16

● Natural Gas ● Electric - Grid

[Export Data by Calendar Month](#)

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

Edit Existing

Meters - Used to Compute Metrics (3)

[Change Meter Selections](#)

[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
10210094 18694608	Electric - Grid	12/31/2016	Yes
10310093 18694607	Electric - Grid	12/31/2016	Yes
NG - 5 18694609	Natural Gas	12/31/2016	Yes

Add A Meter

Associate Meters/Accounts;
establish which meters to use
in ENERGY STAR Rating

Add Meters/Utility
Accounts

Edit Existing

Property Meter Entries

Display Year(s): 2016

	Start Date	End Date	Usage kWh (thousand Watt hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Update
<input type="checkbox"/>	1/1/2016	1/31/2016	6,912			<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>	2/1/2016	2/29/2016	7,488			<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>	3/1/2016	3/31/2016	7,360	969.64	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>	4/1/2016	4/30/2016	9,408	1,245.37	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>	5/1/2016	5/31/2016	10,880	1,404.12	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>	6/1/2016	6/30/2016	14,656	1,809.91	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>	7/1/2016	7/31/2016	12,608	1,758.18	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>	8/1/2016	8/31/2016	15,616	1,872.59	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>		9/30/2016	15,552	1,780.88	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>		10/31/2016	10,816	1,318.15	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>		11/30/2016	8,192	1,023.12	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo
<input type="checkbox"/>		12/31/2016	7,744	996.53	<input type="checkbox"/>	<input type="checkbox"/>			7/27/2017 Data Impo

Delete Selected Entries
 Add Another Entry
 Learn how to copy/paste
 Delete All Entries

[Download to Green Button XML](#) [Download to Excel](#)

Upload data in bulk for this meter:

No file chosen

Filter date range

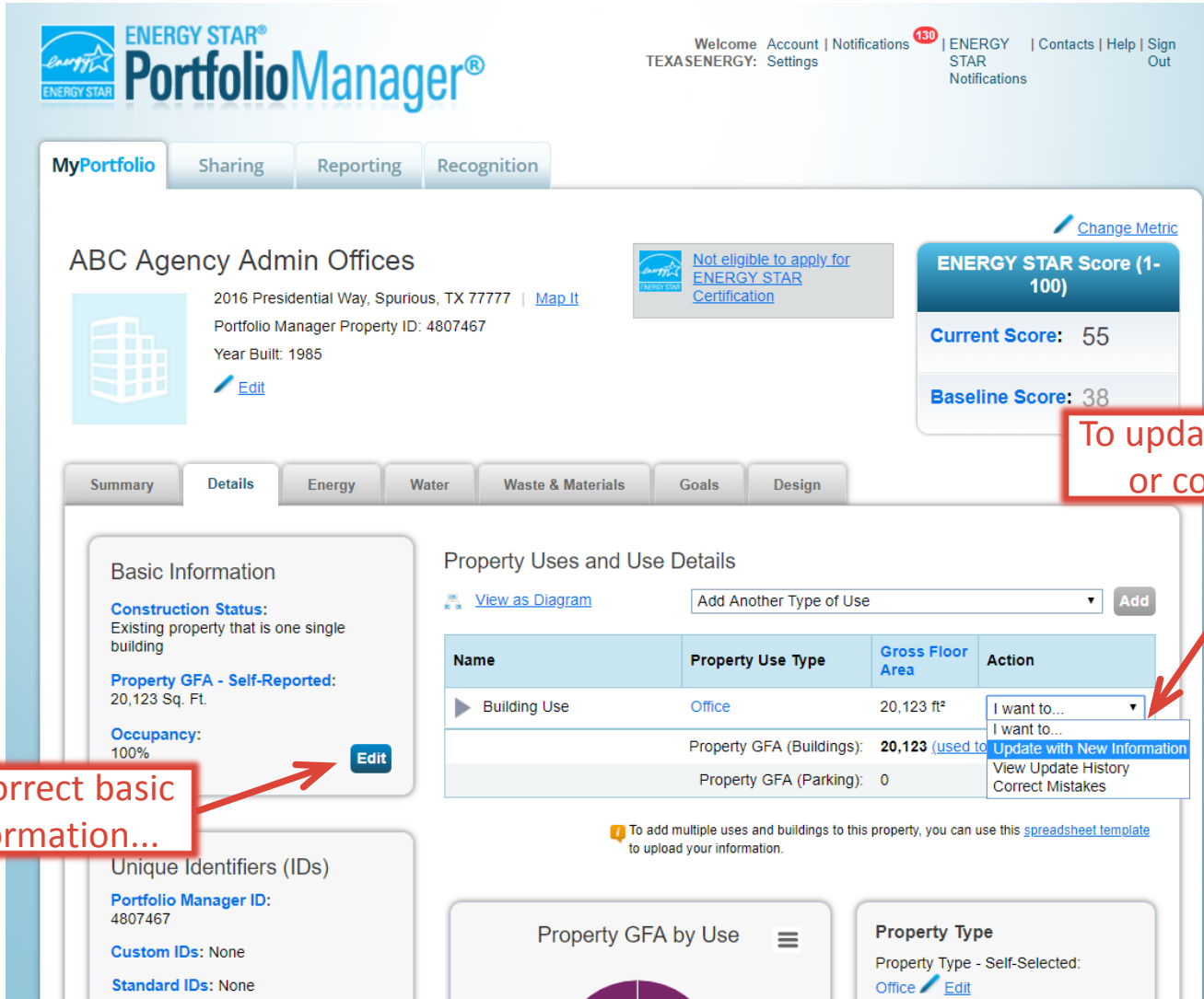
Click to edit old data

Existing Entries

Bulk upload for one account (multi-account bulk entry covered in later slides)

Add New (Single) Entry/Bill

Corrections/Updates of Property Information



The screenshot shows the Energy Star Portfolio Manager interface for a property named "ABC Agency Admin Offices". The interface includes a navigation menu with "MyPortfolio", "Sharing", "Reporting", and "Recognition". The main content area displays property details such as address (2016 Presidential Way, Spurious, TX 77777), Portfolio Manager Property ID (4807467), and Year Built (1985). A callout box indicates the property is "Not eligible to apply for ENERGY STAR Certification". The Energy Star Score is shown as 55 (Current) and 38 (Baseline). The "Details" tab is active, showing "Basic Information" and "Property Uses and Use Details". The "Basic Information" section includes "Construction Status" (Existing property that is one single building), "Property GFA - Self-Reported" (20,123 Sq. Ft.), and "Occupancy" (100%). An "Edit" button is present next to the occupancy information. The "Property Uses and Use Details" section features a table with columns for Name, Property Use Type, Gross Floor Area, and Action. The table lists "Building Use" with a Property Use Type of "Office" and a Gross Floor Area of 20,123 ft². A dropdown menu is open for the "Action" column, showing options: "I want to...", "I want to...", "Update with New Information", "View Update History", and "Correct Mistakes". A red arrow points from a callout box to the "Update with New Information" option. Below the table, there is a note: "To add multiple uses and buildings to this property, you can use this spreadsheet template to upload your information." The bottom of the interface shows "Property GFA by Use" and "Property Type" (Office).

To update new information or correct mistakes...

To correct basic information...

Corrections of Property Details

Property Use Detail

* What is the primary function of your property?

Property type defined by Portfolio Manager: K-12 School
Portfolio Manager considers your property to be this type based on the information you have entered. If this type doesn't look correct to you, please see [this information](#).

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?

Construction Status: *

Existing
 Design
 Test

Year Built:

Gross Floor Area: *

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: %

Leave this as 'one building' for all K-12 Schools

Default or outdated information may need to be updated

Scroll down and click here to save changes

Updating Property Details

Type of Use: K-12 School

Detail	Current Value	Updated Value	Current As Of	Temporary Value
★ Gross Floor Area	309611 Sq. Ft. (as of 01/01/2000)	<input type="text"/> Sq. Ft. <input type="button" value="v"/>	<input type="text"/>	<input type="checkbox"/>
Gymnasium Floor Area	0 Sq. Ft. (as of 01/01/2000)	<input type="text"/> Sq. Ft. <input type="button" value="v"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ High School	No (as of 01/01/2000)	<input type="button" value="v"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
Number of Workers on Main Shift	238.40047 (as of 01/01/2000)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
	3096.11 (as of 01/01/2000)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
	Not Entered	<input type="button" value="v"/>	<input type="text"/>	<input type="checkbox"/>
★ Weekend Operation	100 (as of 01/01/2000)	<input type="button" value="v"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Number of Computers	541.81925 (as of 01/01/2000)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Cooking Facilities	Yes (as of 01/01/2000)	<input type="button" value="v"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Number of Walk-in Refrigeration/Freezer Units	3,09611 (as of 01/01/2000)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	All of it - 100% (as of 01/01/2000)	<input type="button" value="v"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	All of it - 100% (as of 01/01/2000)	<input type="button" value="v"/> <input type="checkbox"/> Use a default	<input type="text"/>	<input type="checkbox"/>
School District	Not Entered	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Default or outdated information may need to be updated

Assign new values and dates to any changes at facility

Scroll down and click here to save changes

Save Update

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.
 ⓘ If your property has more than one building, it is important that you keep your Property Use Details (# Workers, Weekly Operating Hours of operation) updated at both the property and building levels so that your ENERGY STAR score and metrics are accurate. [Learn more about keeping Use Details up to date](#)






Bulk upload for multiple accounts


MyPortfolio
Sharing
Reporting
Recognition

Properties (1320)

Add a Property

Manage Portfolio

-  [Transfer ownership](#) of a property that you manage to another Portfolio Manager user.
-  [Upload and/or update multiple properties](#) at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.
-  [Download your entire portfolio to Excel](#) or create a [custom download](#).
-  [Set a portfolio baseline and/or target](#) to help measure progress.
-  [Add sample properties](#) to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.


Dashboard (Metrics current as of 04/24/2019 05:51 PM EDT) 

ABC Sample Group (5) Energy Highlights Refresh Metrics

[Add/Edit/Delete Groups](#) [Add/Edit/Delete Views](#)


Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft ²)	Source EUI (kBtu/ft ²)
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Building A 4807466	12/31/2016	56	45.5	127.5
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Building C 4807461	12/31/2016	NA	22.7	59.8
Building D 4807463	12/31/2016	41	61.9	165.9

First Previous Page 1 of 1 Next Last 100 View 1 - 5 of 5

 [Download Data Table](#)

Click here to upload in bulk (meters, bills, facilities..)


Texas Energy Engineering Services, Inc. (www.teesi.com)



SECO
State Energy Conservation Office

13 of 26

Bulk upload



Welcome Account | Notifications 130 | ENERGY STAR Notifications | Contacts | Help | Sign Out

TEXASENERGY: Settings

MyPortfolio
Sharing
Reporting
Recognition

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [entering each property manually](#) or adding bills manually. Learn more below.

My Spreadsheet Uploads

The following spreadsheets have been uploaded to Portfolio Manager. Depending on the size of your spreadsheet, completing the upload to your portfolio may take a while.

<input type="checkbox"/> File Name	Type of Upload	Date	Status
<input type="checkbox"/> Add_Meters.xlsx	Add Meters to Existing Properties	2/21/2019 5:59 PM	Success
<input type="checkbox"/> Add_Meters.xlsx	Add Meters to Existing Properties	2/21/2019 5:58 PM	Failed View Errors

[Delete Selected Entries](#)

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template: No file chosen

Select "Browse" to locate the file on your computer and then select "Upload."

This is a powerful feature. Be careful!

- o Multiple submissions could result in duplicate data being added to your portfolio, property or meter.
- o Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

Warning! This is a powerful feature.

Click here to create an Upload Template (meters, bills, etc...)

Bulk upload

MyPortfolio | Sharing | Reporting | Recognition

Create a Custom Upload Template

If you want to add property use or meter information to your spreadsheet, first tell us some information about what you are trying to upload to Portfolio Manager. Then simply fill it in with your information and upload it!

**Select Task
(Add meters, Add bills...)**

1 Select the Task You are Performing

- Add Meters to Existing Properties
- Add Bills to Existing Meters (i.e., meter consumption information)
- Update [Use Details](#) for Existing Properties (e.g. Weekly Hours of Operation, Number of Workers, etc.)
- Edit Basic Property Information for Existing Properties (such as name and address)

Warning - Don't Change Columns!

In order for your upload to work you cannot Add, Delete

**Select Properties
(Individual, all, or custom group)**

2 Select Properties to Include

Properties:

Select which meter types and how many new entries to be processed

3 Select Detailed Information to Include

Energy Meter Types: Electric Natural Gas

Water Meter Types: Municipally Supplied Potable Water

Create & Download Template [Cancel](#)

Click here to download template

Populating the Bulk Upload Template

Test Add_Bills_to_Meters (10).xlsx - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW DEVELOPER ADD-INS BLUEBEAM POWERPVT

	G	H	I	J	K	L	M		
1	Meter Name (Pre-filled)	Meter Type (Pre-filled)	Start Date (Required)	End Date (Required)	Usage (Required)	Meter Unit (Pre-filled)	Cost (Optional)	Estimation (Required)	Green Power? (Required)
2	SMEU 10794-1	Electricity - Grid Purchase	Last Bill 11/1/2014	11/30/2014	81504	kWh (thousand Watt-hours)	9129.47	No	No
3	SMEU 10794-1	Electricity - Grid Purchase				kWh (thousand Watt-hours)		No	No
4	SMEU 10794-1	Electricity - Grid Purchase				kWh (thousand Watt-hours)		No	No
5	SMEU 10794-1	Electricity - Grid Purchase				kWh (thousand Watt-hours)		No	No
6	SMEU 10794-1					kWh (thousand Watt-hours)			
7	SMEU 10794-1								
8	SMEU 10794-1								
9	1203-1563-00 Pedernales		Last Bill 1/1/2012	1/31/2012	138240	kWh (thousand Watt-hours)	10927.17	No	No
10	1203-1563-00 Pedernales								
11	1203-1563-00 Pedernales								
12	1203-1563-00 Pedernales	Electricity - Grid Purchase				Watt-hours)			

All accounts listed with names given in PM

Last entry on each account shown for reference

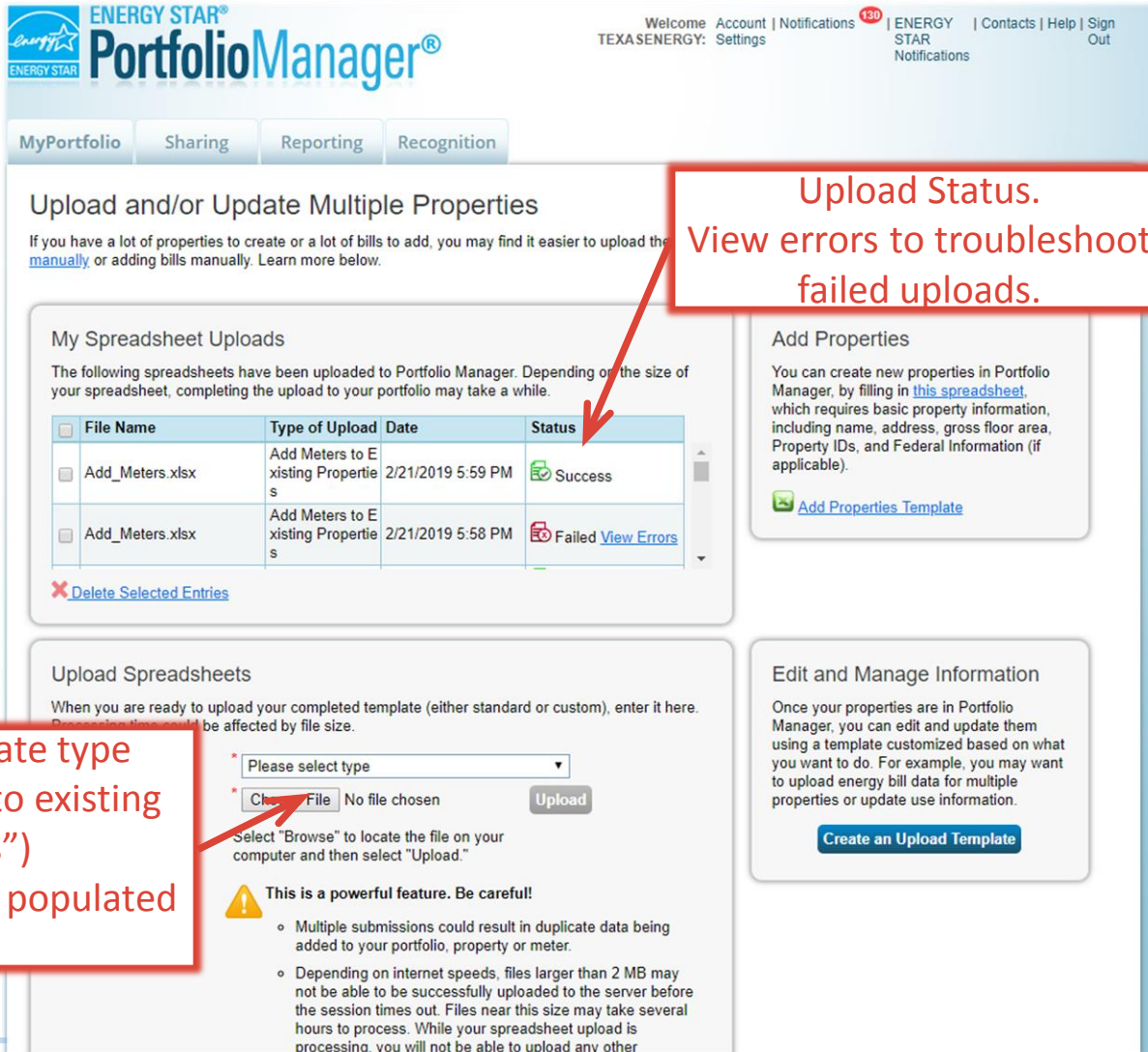
Different meter types on separate tabs

Green columns/white cells require entry. Do not edit grey rows/columns.

Start Date
The Start Date is the date (XX/XX/XXXX) of the first day of the billing cycle.
Use either DD-MM-YYYY or MM-DD-YYYY, to match your Operating System's date setting.

Template sheet contains instruction tab and pop-up tips for most inputs

Bulk upload



Welcome | Account | Notifications ¹³⁰ | ENERGY STAR | Contacts | Help | Sign Out
TEXASENERGY: Settings | STAR Notifications

MyPortfolio | Sharing | Reporting | Recognition

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload the [manually](#) or adding bills manually. Learn more below.

My Spreadsheet Uploads

The following spreadsheets have been uploaded to Portfolio Manager. Depending on the size of your spreadsheet, completing the upload to your portfolio may take a while.

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* Please select type

* No file chosen

Select "Browse" to locate the file on your computer and then select "Upload."

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[Create an Upload Template](#)

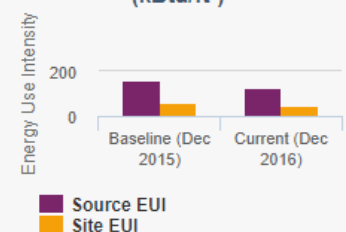
Upload Status.
View errors to troubleshoot failed uploads.

Select template type (ex: "add bills to existing meters")
And browse for populated file

Establishing Goals

Summary
Details
Energy
Water
Waste & Materials
Goals
Design

Energy Performance (kBtu/ft²)



Legend: Source EUI (purple), Site EUI (yellow)

Metrics Comparison for Your Property & Your Target [Change Time Period](#)

Metric	Dec 31 2015 (Energy Baseline)	Dec 31 2016 (Energy Current)	Target*	Median Property*
ENERGY STAR score(1-100)	38	55	75	50
Source EUI(kBtu/ft ²)	157.5	126.0	94.4	135.9
Site EUI(kBtu/ft ²)	60.1	48.1	36.0	51.9
Source Energy Use(kBtu)	3169377.9	2535502.2	1899708.2	2734938.3
Site Energy Use(kBtu)	1209640.2	967712.1	725051.9	1043830.0
Energy Cost(\$)	40992.11	32793.69	24570.46	35373.18
Total GHG Emissions(Metric Tons CO ₂ e)	151.5	121.2	90.8	130.7

* To compute the metrics at the target and median levels of performance, we will use the fuel mix associated with your property's current energy use.

Baselines & Targets

	Baselines	Target
Energy	12/31/2015	75
Water	08/31/2016	Not Available
Waste/Materials	Not Available	Not Available

[Set Baselines or Target](#)

Generate & Download Performance Documents for this Property

- [Statement of Energy Performance \(SEP\)](#)
- [ENERGY STAR Scorecard](#)
- [Progress & Goals Report](#)
- [Data Verification Checklist](#)
- [Water Scorecard](#)

Total Project Investment

\$0.00

Set Baselines or Target



Establishing Goals

MyPortfolio | Sharing | Reporting | Recognition

Set Performance Baseline & Target

To establish a performance target, you must first define a performance baseline. To establish a performance target, you must first define a performance baseline. To establish a performance target, you must first define a performance baseline.

Targets are not available at this time for water and waste metrics. Targets are not available at this time for water and waste metrics. Targets are not available at this time for water and waste metrics.

Set Baseline energy consumption, or let ESPM set it automatically

Baselines

Energy Baseline: Select a baseline: 12/31/2015 Let Portfolio Manager automatically set my baselines

Water Baseline: Select a baseline: 08/31/2016 Let Portfolio Manager automatically set my baselines

Waste Baseline: You must have at least one waste/material meter to select a baseline. After you [add a meter](#), don't forget to [include your metrics](#) as well.

Must have 12 full calendar months of Property use information and Energy Consumption history to establish baseline

Energy Target

Energy Target Metric: * Target ENERGY STAR Score

Energy Target Value: * 75 (1-100 value)

[Save & Calculate Other Metrics](#)

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

Metric	Dec 2015 (Energy Baseline)	Dec 2016 (Energy Current)	Target*	Median Property*
ENERGY STAR score (1-100)	38	55	75	50
Source EUI (kBtu/ft ²)	157.5	126.0	94.4	135.9

Set Target Metric (ex: Energy Star Score)

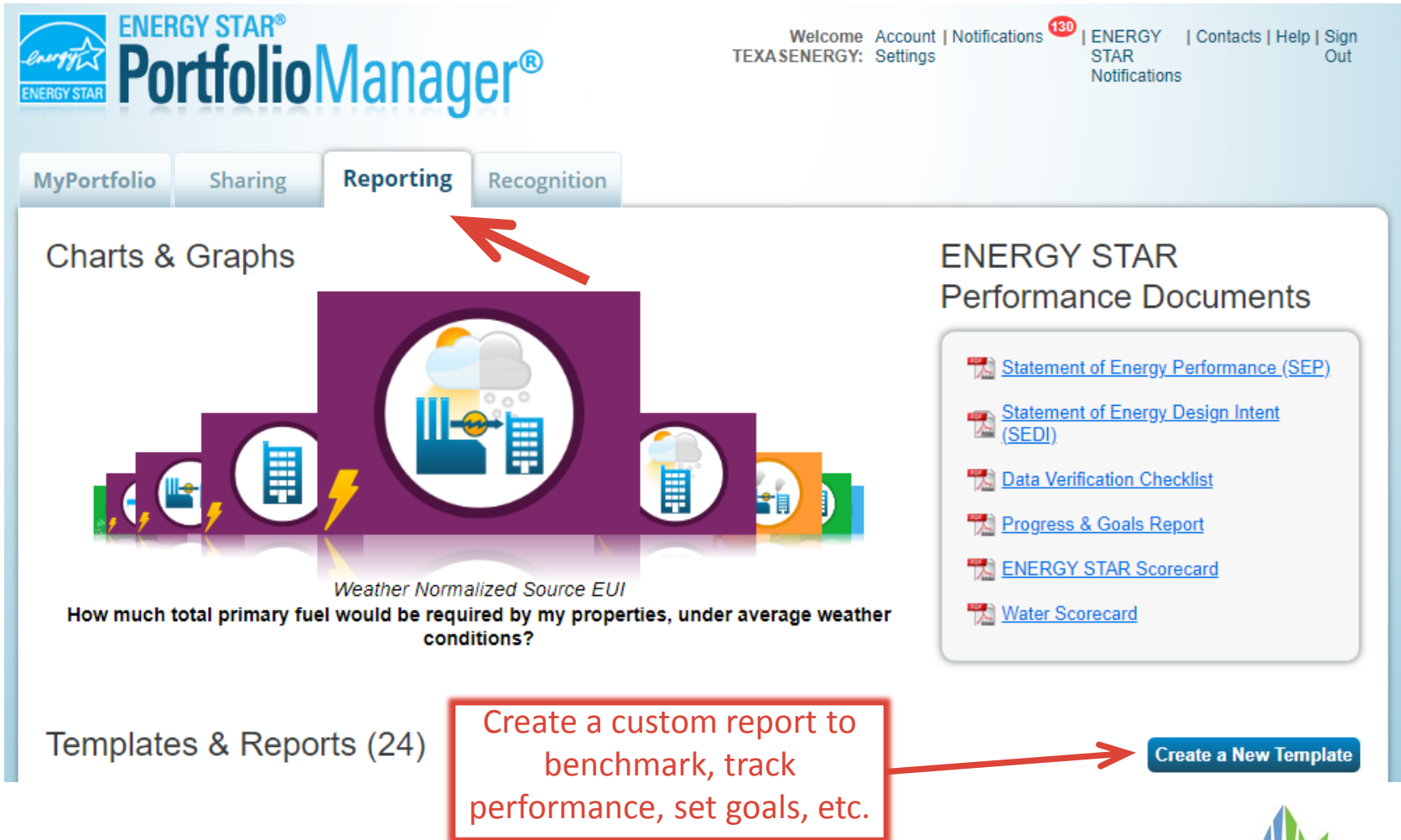
Informational Text:

Selecting Baselines
A **baseline** is made up of 12 full calendar months of use information as well as meter entries (either energy, water, or waste/materials). It is defined by selecting the last month in the time frame (also known as the **Year Ending Date**). Portfolio Manager can automatically determine your baseline by calculating the earliest eligible year ending date.

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](#).

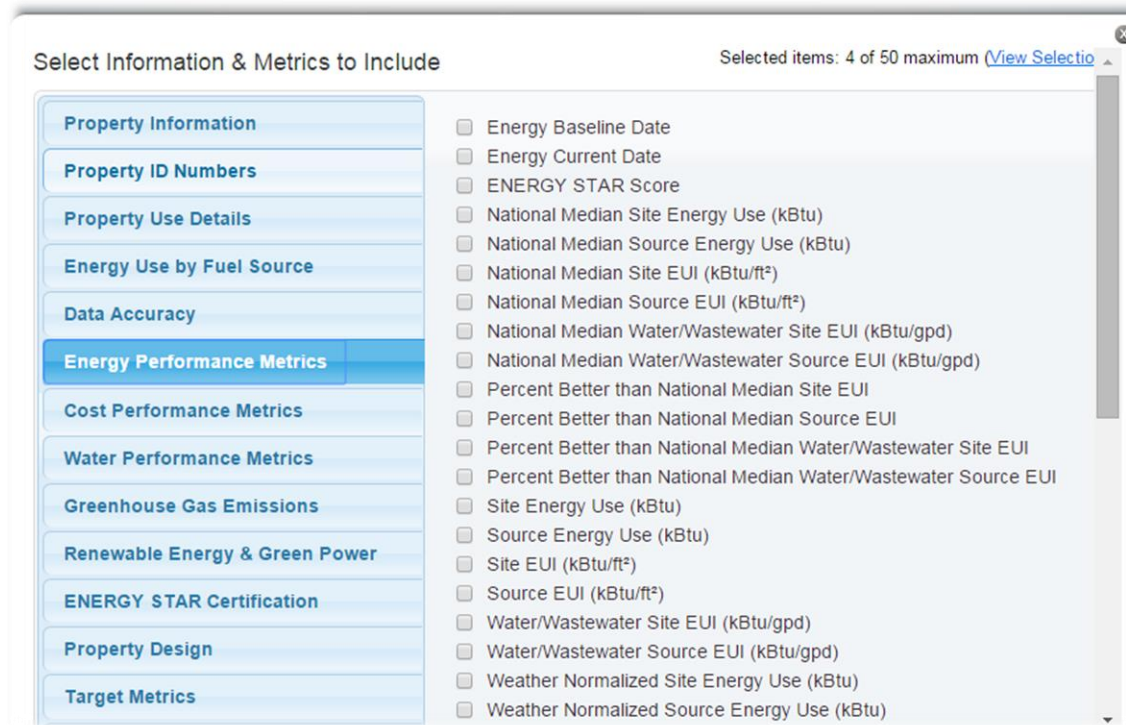
Portfolio Manager Reporting Feature



The screenshot shows the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo and the text 'ENERGY STAR PortfolioManager®'. To the right, there is a navigation bar with links for 'Welcome', 'Account', 'Notifications' (with a red badge showing '130'), 'ENERGY STAR Notifications', 'Settings', 'Contacts', 'Help', and 'Sign Out'. Below the navigation bar are four tabs: 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The 'Reporting' tab is selected and highlighted with a red arrow. Under the 'Reporting' tab, there are two main sections: 'Charts & Graphs' and 'ENERGY STAR Performance Documents'. The 'Charts & Graphs' section features a large purple graphic with a circular icon containing a sun, clouds, and buildings, with a red arrow pointing to it. Below this graphic is the text 'Weather Normalized Source EUI' and a question: 'How much total primary fuel would be required by my properties, under average weather conditions?'. The 'ENERGY STAR Performance Documents' section lists several documents: 'Statement of Energy Performance (SEP)', 'Statement of Energy Design Intent (SEDI)', 'Data Verification Checklist', 'Progress & Goals Report', 'ENERGY STAR Scorecard', and 'Water Scorecard'. At the bottom left, there is a section for 'Templates & Reports (24)' with a red-bordered box containing the text 'Create a custom report to benchmark, track performance, set goals, etc.' and a red arrow pointing to a 'Create a New Template' button.

Reporting (cont.)

- Up to 50 metrics can be selected to include in report.
- One, some, or all facilities can be included.
- Report template/preferences can be saved and regenerated periodically.



Select Information & Metrics to Include

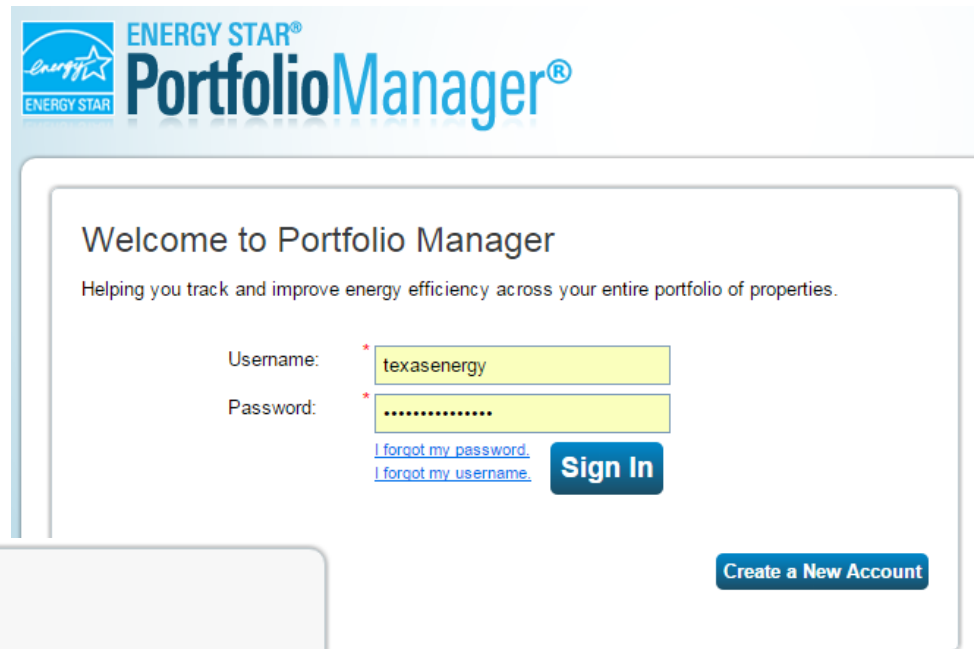
Selected items: 4 of 50 maximum [View Selection](#)

Category	Metric
Property Information	<input type="checkbox"/> Energy Baseline Date
Property ID Numbers	<input type="checkbox"/> Energy Current Date
Property Use Details	<input type="checkbox"/> ENERGY STAR Score
Energy Use by Fuel Source	<input type="checkbox"/> National Median Site Energy Use (kBtu)
Data Accuracy	<input type="checkbox"/> National Median Source Energy Use (kBtu)
Energy Performance Metrics	<input type="checkbox"/> National Median Site EUI (kBtu/ft ²)
Cost Performance Metrics	<input type="checkbox"/> National Median Source EUI (kBtu/ft ²)
Water Performance Metrics	<input type="checkbox"/> National Median Water/Wastewater Site EUI (kBtu/gpd)
Greenhouse Gas Emissions	<input type="checkbox"/> National Median Water/Wastewater Source EUI (kBtu/gpd)
Renewable Energy & Green Power	<input type="checkbox"/> Percent Better than National Median Site EUI
ENERGY STAR Certification	<input type="checkbox"/> Percent Better than National Median Source EUI
Property Design	<input type="checkbox"/> Percent Better than National Median Water/Wastewater Site EUI
Target Metrics	<input type="checkbox"/> Percent Better than National Median Water/Wastewater Source EUI
	<input type="checkbox"/> Site Energy Use (kBtu)
	<input type="checkbox"/> Source Energy Use (kBtu)
	<input type="checkbox"/> Site EUI (kBtu/ft ²)
	<input type="checkbox"/> Source EUI (kBtu/ft ²)
	<input type="checkbox"/> Water/Wastewater Site EUI (kBtu/gpd)
	<input type="checkbox"/> Water/Wastewater Source EUI (kBtu/gpd)
	<input type="checkbox"/> Weather Normalized Site Energy Use (kBtu)
	<input type="checkbox"/> Weather Normalized Source Energy Use (kBtu)



Creating a Portfolio Manager Account

- <https://portfoliomanager.energystar.gov/pm/login.html>
- Follow setup prompts



Searchability in Portfolio Manager

Can other people search for you and send you a connection request?

Yes
 No



Certifications

- EPA Recognition for high performance building
- Properties with an ENERGY STAR score of 75 or higher are eligible
- An application must be filled out and reviewed by a Licensed Professional (LP)
- An LP Engineer or Architect must visit the facility and verify details in the application and stamp with PE or RA seal

Building Certification Applications

- 2018 Building Certification applications were temporarily suspended September 2018 – May 2019
- Certification Applications re-opened:

Property Type	Certification Reinstated
Warehouses	May 1
Hotels	May 1
Houses of Worship	Late May
K-12 Schools	Late May
Offices	Summer 2019*
Retail Stores	Summer 2019*

** Additional analysis underway, release date TBD*



2018 and 2019 Certifications

Certification Policies and Deadlines

- Deadline for both 2018 and 2019 certification will be December 31, 2019.
- If you intend to apply for 2018 and 2019 certification for the same property, you **MUST** first apply for 2018 certification
 - Following approval, you can then apply for 2019 certification as long as the Period Ending Date (PED) for 2019 is at least 11 months after the PED for 2018
- 2018 application may have a PED between 5/31/2018 and 12/31/2018.
- 2019 application may have a PED anytime from 5/31/2018 onward (as long as it is at least 11 months after 2018 PED, where applicable).



Questions?

- Extensive training materials available on ENERGY STAR website
 - SECO TA Program
- “Help” and glossary dialogues available from most screens in Portfolio Manager

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