ENERGY STAR Portfolio Manager Training

What can Portfolio Manager do?

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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
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

Portfolio Manager Structure

- **Portfolio** (Whole Account)

- **Groups** (Cities, Counties, School Districts, etc.)

- **Properties** (Courthouses, Libraries, Offices, High Schools, etc.)
  - Usage Details
  - Meters
  - Goals
Property Main Page

- Current Score
- Dashboard
- Property Info
- Benchmarks
- Summary

ABC Agency Admin Offices
2016 Presidential Way, Spurils, TX 77777
Portfolio Manager Property ID: 4807467
Year Built: 1985

ENERGY STAR Score (1-100)
Current Score: 55
Baseline Score: 38

Metrics Summary:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Dec 2015 (Energy Baseline)</th>
<th>Dec 2016 (Energy Current)</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENERGY STAR Score (1-100)</td>
<td>38</td>
<td>55</td>
<td>17.00 (44.70%)</td>
</tr>
<tr>
<td>Source EUI (kBtu/ft²)</td>
<td>157.5</td>
<td>126.0</td>
<td>-31.50 (-20.00%)</td>
</tr>
<tr>
<td>Site EUI (kBtu/ft²)</td>
<td>60.1</td>
<td>48.1</td>
<td>-12.00 (-20.00%)</td>
</tr>
<tr>
<td>Energy Cost ($)</td>
<td>40,952.11</td>
<td>32,793.69</td>
<td>-8198.42 (-20.00%)</td>
</tr>
<tr>
<td>Total GHG Emissions Intensity</td>
<td>7.5</td>
<td>6.0</td>
<td>-1.50 (-20.00%)</td>
</tr>
<tr>
<td>Water Use (All Water Sources)</td>
<td>Not Available</td>
<td>7,205.7</td>
<td>N/A</td>
</tr>
<tr>
<td>Total Waste (Disposed and Diverted) (Tons)</td>
<td>Not Available</td>
<td>Not Available</td>
<td>N/A</td>
</tr>
</tbody>
</table>
**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.

<table>
<thead>
<tr>
<th>Property Use Name:</th>
<th>Building Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Use:</td>
<td>Office</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Detail</th>
<th>Current Value</th>
<th>Updated Value</th>
<th>Current As</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gross Floor Area</strong></td>
<td>20123 Sq. Ft (as of 01/01/1985)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Weekly Operating Hours</strong></td>
<td>65 (as of 01/01/1985)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Number of Workers on Main Shift</strong></td>
<td>46.2829 (as of 01/01/1985)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Number of Computers</strong></td>
<td>40.246 (as of 01/01/1985)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Percent That Can Be Heated</strong></td>
<td>50 % or more (as of 01/01/1985)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Percent That Can Be Cooled</strong></td>
<td>50 % or more (as of 01/01/1985)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **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.

⭐ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.
Associate Meters/Accounts; establish which meters to use in ENERGY STAR Rating

Add Meters/Utility Accounts

Edit Existing

Property Meters

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)

Add Meters/Utility Accounts

Edit Existing

Energy Type
Most Recent Bill Date
In Use? (Inactive Date)

<table>
<thead>
<tr>
<th>Name</th>
<th>Meter ID</th>
<th>Energy Type</th>
<th>Most Recent Bill Date</th>
<th>In Use? (Inactive Date)</th>
</tr>
</thead>
<tbody>
<tr>
<td>10210094</td>
<td>19694608</td>
<td>Electric - Grid</td>
<td>12/31/2016</td>
<td>Yes</td>
</tr>
<tr>
<td>10310093</td>
<td>18694607</td>
<td>Electric - Grid</td>
<td>12/31/2016</td>
<td>Yes</td>
</tr>
<tr>
<td>NG - 5</td>
<td>18694609</td>
<td>Natural Gas</td>
<td>12/31/2016</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Property Meter Entries

**Filter date range**

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Usage kWh (thousand Watt hours)</th>
<th>Total Cost ($)</th>
<th>Calculation</th>
<th>Green Power</th>
<th>Demand (KW)</th>
<th>Demand Cost ($)</th>
<th>Last Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2016</td>
<td>1/31/2016</td>
<td>6.912</td>
<td>569.64</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
<tr>
<td>3/1/2016</td>
<td>3/31/2016</td>
<td>7.360</td>
<td>869.64</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
<tr>
<td>5/1/2016</td>
<td>5/31/2016</td>
<td>10.880</td>
<td>1,404.12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
<tr>
<td>6/1/2016</td>
<td>6/30/2016</td>
<td>14.056</td>
<td>1,005.91</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
<tr>
<td>7/1/2016</td>
<td>7/31/2016</td>
<td>12.688</td>
<td>1,758.18</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
<tr>
<td>8/1/2016</td>
<td>8/31/2016</td>
<td>15.016</td>
<td>1,072.59</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
<tr>
<td>9/30/2016</td>
<td>10/31/2016</td>
<td>15.552</td>
<td>1,760.88</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
<tr>
<td>10/31/2016</td>
<td>11/30/2016</td>
<td>10.016</td>
<td>1,310.15</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
<tr>
<td>11/30/2016</td>
<td>12/31/2016</td>
<td>8.192</td>
<td>1,023.12</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
<tr>
<td>12/31/2016</td>
<td></td>
<td>7.744</td>
<td>965.53</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>7/27/2017</td>
</tr>
</tbody>
</table>

### Existing Entries

- **Click to edit old data**

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

**Add New (Single) Entry/Bill**

- Download to Green Button XML
- Download to Excel

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Energy Star Portfolio Manager Training

Corrections/Updates of Property Information

To correct basic information...

To update new information or correct mistakes...

Texas Energy Engineering Services, Inc. (www.teesi.com)
Corrections of Property Details

Property Use Detail
- What is the primary function of your property?
  - K-12 School

Property type defined by Portfolio Manager:
- K-12 School

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:
- 2000

Gross Floor Area:
- 309,611 Sq. Ft.

Occupancy:
- 100%

Update Property

Default or outdated information may need to be updated

Scroll down and click here to save changes

Leave this as ‘one building’ for all K-12 Schools
# Updating Property Details

Default or outdated information may need to be updated. Scroll down and click here to save changes. Assign new values and dates to any changes at facility.

<table>
<thead>
<tr>
<th>Type of Use: K-12 School</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Detail</strong></td>
</tr>
<tr>
<td>--------------</td>
</tr>
<tr>
<td>Gross Floor Area</td>
</tr>
<tr>
<td>Gymnasium Floor Area</td>
</tr>
<tr>
<td>High School</td>
</tr>
<tr>
<td>Number of Workers on Main Shift</td>
</tr>
<tr>
<td>Number of Computers</td>
</tr>
<tr>
<td>Cooking Facilities</td>
</tr>
<tr>
<td>Number of Walk-in Refrigeration/Freezer Units</td>
</tr>
<tr>
<td>Percent That Can Be Heated</td>
</tr>
<tr>
<td>Percent That Can Be Cooled</td>
</tr>
<tr>
<td>School District</td>
</tr>
</tbody>
</table>

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 up to date.
Bulk upload for multiple accounts

Click here to upload in bulk (meters, bills, facilities..)
Warning! This is a powerful feature.

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

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

2. Select Properties
   (Individual, all, or custom group)

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

Click here to download template
Populating the Bulk Upload Template

<table>
<thead>
<tr>
<th>Meter Name (Pre-filled)</th>
<th>Meter Type (Pre-filled)</th>
<th>Start Date (Required)</th>
<th>End Date (Required)</th>
<th>Usage (Required)</th>
<th>Meter Unit (Pre-filled)</th>
<th>Cost (Optional)</th>
<th>Estimation (Required)</th>
<th>Green Power? (Required)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMEU 10794-1</td>
<td>Electricity - Grid Purchase</td>
<td>Last Bill 11/1/2014</td>
<td>11/30/2014</td>
<td>81504</td>
<td>kWh (thousand)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SMEU 10794-1</td>
<td>Electricity - Grid Purchase</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- All accounts listed with names given in PM
- Different meter types on separate tabs
- Last entry on each account shown for reference
- Green columns/white cells require entry. Do not edit grey rows/columns.
- Template sheet contains instruction tab and pop-up tips for most inputs
Bulk upload

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

Upload Status. View errors to troubleshoot failed uploads.
Establishing Goals

Metrics Comparison for Your Property & Your Target

<table>
<thead>
<tr>
<th>Metric</th>
<th>Dec 31 2015 (Energy Baseline)</th>
<th>Dec 31 2015 (Energy Current)</th>
<th>Target*</th>
<th>Median Property*</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENERGY STAR score(1-100)</td>
<td>38</td>
<td>55</td>
<td>75</td>
<td>50</td>
</tr>
<tr>
<td>Source EUI(kBtu/ft²)</td>
<td>157.5</td>
<td>126.0</td>
<td>94.4</td>
<td>135.9</td>
</tr>
<tr>
<td>Site EUI(kBtu/ft²)</td>
<td>60.1</td>
<td>48.1</td>
<td>36.0</td>
<td>51.9</td>
</tr>
<tr>
<td>Source Energy Use(kBtu)</td>
<td>3108377.9</td>
<td>2535502.2</td>
<td>1898703.2</td>
<td>2734358.3</td>
</tr>
<tr>
<td>Site Energy Use(kBtu)</td>
<td>1299640.2</td>
<td>987712.1</td>
<td>725051.9</td>
<td>1043830.0</td>
</tr>
<tr>
<td>Energy Cost($)</td>
<td>409922.1</td>
<td>32783.69</td>
<td>24570.46</td>
<td>35373.18</td>
</tr>
<tr>
<td>Total GHG Emissions(Metric Tons CO2e)</td>
<td>151.5</td>
<td>121.2</td>
<td>90.8</td>
<td>130.7</td>
</tr>
</tbody>
</table>

* 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

<table>
<thead>
<tr>
<th>Category</th>
<th>Baselines</th>
<th>Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy</td>
<td>12/31/2015</td>
<td>75</td>
</tr>
<tr>
<td>Water</td>
<td>08/31/2015</td>
<td>Not Available</td>
</tr>
<tr>
<td>Waste/Materials</td>
<td>Not Available</td>
<td>Not Available</td>
</tr>
</tbody>
</table>
Establishing Goals

Set Baseline energy consumption, or let ESPM set it automatically

Set Target Metric (ex: Energy Star Score)

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

Charts & Graphs

ENERGY STAR Portfolio Manager®

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

MyPortfolio | Sharing | Reporting | Recognition

Charts & Graphs

Weather Normalized Source EUI
How much total primary fuel would be required by my properties, under average weather conditions?

Templates & Reports (24)

Create a custom report to benchmark, track performance, set goals, etc.

Create a New Template

ENERGY STAR Performance Documents

Statement of Energy Performance (SEP)
Statement of Energy Design Intent (SEDI)
Data Verification Checklist
Progress & Goals Report
ENERGY STAR Scorecard
Water Scorecard

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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](image-url)
Creating a Portfolio Manager Account

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

Welcome to Portfolio Manager

Helping you track and improve energy efficiency across your entire portfolio of properties.

Username: texasonergy
Password: *********

I forgot my password
I forgot my username

Create a New Account
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:

<table>
<thead>
<tr>
<th>Property Type</th>
<th>Certification Reinstated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warehouses</td>
<td>May 1</td>
</tr>
<tr>
<td>Hotels</td>
<td>May 1</td>
</tr>
<tr>
<td>Houses of Worship</td>
<td>Late May</td>
</tr>
<tr>
<td>K-12 Schools</td>
<td>Late May</td>
</tr>
<tr>
<td>Offices</td>
<td>Summer 2019*</td>
</tr>
<tr>
<td>Retail Stores</td>
<td>Summer 2019*</td>
</tr>
</tbody>
</table>

*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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