

Welcome! We will begin shortly

- **Login or Audio Troubles**

- Please type questions in chat window for help.
- If you cannot hear the audio through the computer, you can listen in by calling: US/Canada Toll 1-650-479-3207 (access code 127 833 7143 #).

- **Polls**

- Today's webinar includes a few interactive polls, including one that is open now (accessible on the right side of your screen under "Polling"). Please take a moment to provide your input!

- **Questions**

- There will be a Q&A session at the end of the presentation.
- Submit questions to the organizer and panelists via chat to "Host."

- **Presentation Slides & Recording**

- Presentation slides will be sent to all participants.
- This session will be recorded, however the Q&A session will not be included in the recording. A link to the recording will be sent to all attendees.

- **Notes**

- To improve audio quality, all attendees are muted upon entry.

Portfolio Manager® 201



ENERGY STAR®
Portfolio Manager®

Learning Objectives

In this session, you will learn about EPA's ENERGY STAR Portfolio Manager tool and how to:

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

Portfolio Manager 101

If you're brand new to using Portfolio Manager, these resources are a good place to start:

- Portfolio Manager 101 webinar
- Portfolio Manager Quick Start Guide

How To

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

MyPortfolio

MyPortfolio

Sharing

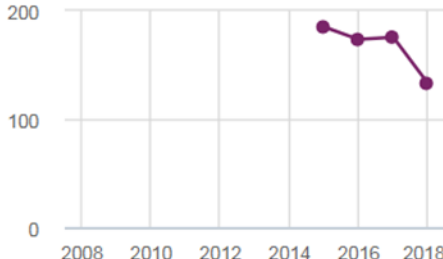
Reporting

Recognition

Properties (4)
Add a Property

Source EUI Trend (kBtu/ft²)


[Change Metric](#)




(Chart current as of 05/16/2019 08:29 PM EDT)

Refresh Chart

Manage Portfolio

 [Transfer ownership](#) of a property that

Dashboard (Metrics current as of 05/16/2019 09:30 PM EDT) 


Search by ID or Name

View All Properties (4) 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 Office Building 6663053 | 01/31/2019 | 65 | 55.4 | 132.9 |
| Sample K-12 School (US) 6663269 | 08/31/2018 | 85 | 55.1 | 104.4 |
| Sample Library (US) 6663268 | 12/31/2017 | NA | 97.1 | 206.8 |
| Sample Office (US) 6663253 | 12/31/2017 | 26 | 103.1 | 250.5 |

First Previous Page 1 of 1 Next Last 100 View 1 - 4 of 4

 [Download Data Table](#)

Edit Property – Basic Information

Summary

Details

Energy

Water

Waste & Materials

Goals

Design

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
100,000 Sq. Ft.

Occupancy:
95%

Edit

Unique Identifiers (IDs)

Portfolio Manager ID:
5941103

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](#)

| Name | Property Use Type | Gross Floor Area | Action |
|---------------------------|-------------------|------------------|---|
| ▶ Building Use | Office | 100,000 ft² | <input type="text" value="I want to..."/> |
| Property GFA (Buildings): | | 100,000 | (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](#)

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.

You have 1000 characters remaining for your notes.

Save Notes

Edit Property – Basic Information

 **ENERGY STAR®**
PortfolioManager™

Welcome [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Français](#)

MyPortfolio | Sharing | Planning | Reporting

Edit Insurance Office

Address Information

* Name:

* Country:

* Street Address:

* City/Municipality:

* County:

* State/Province:

* Postal Code:

Property Use Detail


* What is the primary function of your property?

Property type defined by Portfolio Manager: Office
Portfolio Manager considers your property to be this type based on the uses you have entered. If this type doesn't look correct to you, please [edit your use 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

How many?

 **Property Type Classification**
The "Property Type defined by Portfolio Manager" was determined by how you classified the uses that make up the property. The primary function you entered may not match the property type defined by Portfolio Manager. It is not required that these match. You may be tracking your property type differently. For example if you have a property that is 60% office, 40% retail, you may classify it as retail, but Portfolio Manager will classify it as office. If you are concerned about the Portfolio Manager determined property type, you may want to make adjustments to the [uses](#) you entered or select a new primary function for the property.

Edit Property – Property Details

Property Details

What is the primary function of your property?

Office

Property Type - EPA Calculated:

Office
Portfolio Manager considers your property to be this type based on the uses you have entered. If this type doesn't look correct to you, please [edit your use 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:

1975

Gross Floor Area:

100,000

Sq. Ft.

Gross Floor Area (GFA) is the total property floor area, measured from the outside surface of the exterior walls of the building(s). Do not including parking. [Details on what to include.](#)

Irrigated Area:

0

Sq. Ft.

Occupancy:

95

%

Additional Information

Is this property's data maintained by a Service and Product Provider?

☒ No

☐ Yes

Is this a Federal Property (owned by any country?)

☒ No

☐ Yes

Update Property

Cancel

Property Type Classification

The "Property Type - EPA Calculated" was determined by how you classified the Property Uses that make up the property. The Property Type you entered may not match the EPA Calculated one, and that's ok, it doesn't have to. You may be tracking your property differently. For example, if you have a property that is 60% office/40% retail, you may classify it as retail, but Portfolio Manager will classify it as office. If you are concerned about the EPA Calculated Property Type, you may want to make adjustments to the [Property Uses](#) you entered or select a new Property Type.

Tip: Defining Property Use Types

- Identify your property's "Primary Function"
 - Pick the property use that best identifies your building
 - More than 80 property types available
- Add additional property uses only if:
 - It is a property use that can get an ENERGY STAR score
 - It accounts for more than 25% of the property's gross floor area (GFA)
 - It is a vacant/unoccupied Office or Medical Office (and is greater than 10% of the property's GFA)
 - The hours of operation differ by more than 10 hours from the main property use

Example: Adding a Separate Property Use for Vacant Space

Summary Details Energy Water Waste & Materials Goals Design

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
100,000 Sq. Ft.

Occupancy:
95%

Unique Identifiers (IDs)

Portfolio Manager ID:
5941103

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.

Additional Information

Federal Property:
Not Set

Service & Product Provider:
None ([Find a SPP](#))

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 | 100,000 ft² | I want to... |
| Property GFA (Buildings): 100,000 (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.

You have 1000 characters remaining for your notes.

Delete this Property

Caution! Deleting your property is permanent.

Save Notes

Scenario

Office Building with
Gross Floor Area =
100,000 sq. ft.

Recently, 10,000 sq. ft.
became vacant.

Click “Add” to add
another use type
(“Office”) to account
for vacant space.

Example: Adding a Separate Property Use for Vacant Space

Add Property Use For Eden Park Test Two

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

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

If you have restaurants, retail, or services (dry cleaners) within the Office, you should create a separate Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

- If it is a [Property Use Type that can get an ENERGY STAR Score](#) (note: Retail and Restaurant are not eligible).
- If it accounts for more than 25% of the property's GFA
- If it is a vacant/unoccupied Office
- If the Hours of Operation differ by more than 10 hours from the main Property Use

[More on this rule.](#)

Name: *

| Property Use Detail | Value | Current As Of | Temporary Value |
|-----------------------------------|--|---|--------------------------|
| ★ Gross Floor Area | * <input type="text" value="0"/> <input type="text" value="Sq. Ft."/> <input type="button" value="v"/> | <input type="text" value="1/1/1981"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Weekly Operating Hours | <input type="text" value="0"/> <input type="checkbox"/> Use a default | <input type="text" value="1/1/1981"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Number of Workers on Main Shift | <input type="text" value="0"/> <input type="checkbox"/> Use a default | <input type="text" value="1/1/1981"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Number of Computers | <input type="text" value="0"/> <input type="checkbox"/> Use a default | <input type="text" value="1/1/1981"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| Percent That Can Be Heated | <input type="text" value=""/> <input type="button" value="v"/> <input type="checkbox"/> Use a default | <input type="text" value="1/1/1981"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Percent That Can Be Cooled | <input type="text" value="50% or more"/> <input type="button" value="v"/> <input type="checkbox"/> Use a default | <input type="text" value="1/1/1981"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |

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

Save Use [Cancel](#)

Enter Zero for these Use Details:

- Gross Floor Area = 0
- Weekly Operating Hours = 0
- Number of Workers on Main Shift = 0
- Number of Computers = 0

Example: Adding a Separate Property Use for Vacant Space

SummaryDetailsEnergyWaterWaste & MaterialsGoalsDesign

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
100,000 Sq. Ft.

Occupancy:
95%

Edit

Unique Identifiers (IDs)

Portfolio Manager ID:
5941103

Custom IDs: None

Standard IDs: None

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Edit

Additional Information

Federal Property:
Not Set

Service & Product Provider:
None ([Find a SPP](#))

Edit

Property Uses and Use Details

[View as Diagram](#)


| Name | Property Use Type | Gross Floor Area | Action |
|---------------------|-------------------|------------------|---|
| ▶ Building Use | Office | 100,000 ft² | <input type="text" value="I want to..."/> |
| ▶ Vacant Office Use | Office | 0 ft² | <input type="text" value="I want to..."/> |

Property GFA (Buildings): **100,000** ([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.

ENERGY STAR. The simple choice for energy efficiency.



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How To

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- Share property data

Correct vs. Update


- If you need to make edits to your property use details, you can either “Correct Mistakes” or “Update with New Information”
- “Correct Mistakes” changes a value that was entered in error
 - No historical record of the old value will be kept or factored into your metrics
- “Update with New Information” tracks a value that is changing over time
 - Enter date as of which the new value took effect, so that the tool can account for this when calculating “time-weighted” metrics

Edit Property – Update with New Information

Scenario


10,000 sq.
ft. of space
is vacated

Property Uses and Use Details

 [View as Diagram](#)

Add Another Type of Use

| Name | Primary Function | Gross Floor Area | Action |
|---------------------------------------|------------------|-------------------------|--|
| ▶ Building Use | Office | 100,000 ft ² | I want to... <input type="button" value="▼"/> |
| ▶ Vacant Office Space | Office | 0 ft ² | I want to... <input type="button" value="▼"/> |
| Property GFA (Buildings): | | 100,000 (used) | <div><div>I want to... Update with New Information View Update History Correct Mistakes Delete use</div></div> |
| Property GFA (Buildings and Parking): | | 100,000 | |

 To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Edit Property – Update with New Information

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: [Office](#)

| Detail | Current Value | Updated Value | Current As Of | Temporary Value |
|-----------------------------------|------------------------------------|--|--|--------------------------|
| ★ Gross Floor Area | 0 Sq. Ft. (as of 01/01/1981) | <input type="text" value="10,000"/> Sq. Ft. <input type="button" value="v"/> | <input type="text"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Weekly Operating Hours | 0 (as of 01/01/1981) | <input type="text"/> <input type="checkbox"/> Use a default | <input type="text"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Number of Workers on Main Shift | 0 (as of 01/01/1981) | <input type="text"/> <input type="checkbox"/> Use a default | <input type="text"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Number of Computers | 0 (as of 01/01/1981) | <input type="text"/> <input type="checkbox"/> Use a default | <input type="text"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| Percent That Can Be Heated | 50 % or more (as of 01/01/1981) | <input type="text"/> <input type="button" value="v"/> <input type="checkbox"/> Use a default | <input type="text"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Percent That Can Be Cooled | 50 % or more (as of 01/01/1981) | <input type="text"/> <input type="button" value="v"/> <input type="checkbox"/> Use a default | <input type="text"/> <input type="button" value="calendar"/> | <input type="checkbox"/> |

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

🗨 If your property has more than one building, you need to update your Property Use Details (# Workers, Weekly Operating Hours of operation) for both the parent property (campus) and the child properties. It is not done automatically. [Learn more about keeping Use Details up to date](#)

[Cancel](#)

Edit Property – Update with New Information

Summary

Details

Energy

Water

Waste & Materials

Goals

Design

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
100,000 Sq. Ft.

Occupancy:
95%

Edit

Unique Identifiers (IDs)

Portfolio Manager ID:
5941103

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


Property Uses and Use Details

[View as Diagram](#)

| Name | Property Use Type | Gross Floor Area | Action |
|----------------------------------|-------------------|------------------|---------------------------------------|
| ▶ Building Use | Office | 100,000 ft² | I want to... |
| ▶ Vacant Office Use | Office | 10,000 ft² | I want to... |
| Property GFA (Buildings): | | 110,000 | 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.

Edit Property – Update with New Information

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: [Office](#)

| Detail | Current Value | Updated Value | Current As Of | Temporary Value |
|-----------------------------------|--------------------------------------|---|---|--------------------------|
| ★ Gross Floor Area | 100000 Sq. Ft. (as of 01/01/1981) | <input type="text" value="90,000"/> Sq. Ft. <input type="button" value="v"/> | <input type="text" value=""/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Weekly Operating Hours | 65 (as of 01/01/1981) | <input type="text" value=""/> <input type="checkbox"/> Use a default | <input type="text" value=""/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Number of Workers on Main Shift | 140 (as of 01/01/1981) | <input type="text" value=""/> <input type="checkbox"/> Use a default | <input type="text" value=""/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Number of Computers | 140 (as of 01/01/1981) | <input type="text" value=""/> <input type="checkbox"/> Use a default | <input type="text" value=""/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| Percent That Can Be Heated | 50 % or more (as of 01/01/1981) | <input type="text" value=""/> <input type="button" value="v"/> <input type="checkbox"/> Use a default | <input type="text" value=""/> <input type="button" value="calendar"/> | <input type="checkbox"/> |
| ★ Percent That Can Be Cooled | 50 % or more (as of 01/01/1981) | <input type="text" value=""/> <input type="button" value="v"/> <input type="checkbox"/> Use a default | <input type="text" value=""/> <input type="button" value="calendar"/> | <input type="checkbox"/> |

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

📌 If your property has more than one building, you need to update your Property Use Details (# Workers, Weekly Operating Hours of operation) for both the parent property (campus) and the child properties. It is not done automatically. [Learn more about keeping Use Details up to date](#)


Save Update

[Cancel](#)



Edit Property – Update With New Information

Property Uses and Use Details

 [View as Diagram](#)

Add Another Type of Use 

Add

| Name | Property Use Type | Gross Floor Area | Action |
|---|-------------------|------------------|--|
| ▼ Office | Office | 97,479 ft² | I want to...  |
| | | | |
| | Value | Current As Of | Temporary Value? |
| ★ Gross Floor Area | 90000 ft² | 05/01/2018 | No |
| ★ Weekly Operating Hours | 65 | 01/01/1981 | No |
| ★ Number of Workers on Main Shift | 140 | 01/01/1981 | No |
| ★ Number of Computers | 140 | 01/01/1981 | No |
| Percent That Can Be Heated | 50 % or more | 01/01/1981 | No |
| ★ Percent That Can Be Cooled | 50 % or more | 01/01/1981 | No |
| ★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score. | | | |
| ▼ Vacant Space | Office | 2,521 ft² | I want to...  |
| | | | |
| | Value | Current As Of | Temporary Value? |
| ★ Gross Floor Area | 10000 ft² | 05/01/2018 | No |

Updated
Gross
Floor Area

Updated
Gross
Floor Area

Edit Property – Update With New Information

SummaryDetailsEnergyWaterWaste & MaterialsGoalsDesign

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
100,000 Sq. Ft.

Occupancy:
95%

Edit

Unique Identifiers (IDs)

Portfolio Manager ID:
5941103

Custom IDs: None

Standard IDs: None

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Edit

Additional Information

Federal Property:
Not Set

Service & Product Provider:
None [\(Find a SPP\)](#)

Edit

Property Uses and Use Details

[View as Diagram](#)

| Name | Property Use Type | Gross Floor Area | Action |
|---|-------------------|------------------|--------------|
| ▶ Building Use | Office | 90,000 ft² | I want to... |
| ▶ Vacant Office Use | Office | 10,000 ft² | I want to... |
| Property GFA (Buildings): 100,000 (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 %
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.

Example of a property accurately set up, accounting for vacant space

Edit Property – Correct Mistakes

Scenario
Incorrect
sq. ft. for
vacant
space
entered

Property Uses and Use Details

 [View as Diagram](#)





| Name | Primary Function | Gross Floor Area | Action |
|---------------------------------------|------------------|------------------|--|
| ▶ Building Use | Office | 98,329 ft² | I want to... <input type="button" value="▼"/> |
| ▶ Vacant Office Space | Office | 1,671 ft² | I want to... <input type="button" value="▼"/> |
| Property GFA (Buildings): | | 100,000 (used) | I want to... Update with New Information View Update History Correct Mistakes Delete use |
| Property GFA (Buildings and Parking): | | 100,000 | |

Edit Property – Correct Mistakes

History Log for Vacant Office Space


Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (campus), you need to [update these Property Use Details in BOTH the parent and child properties](#).

★ Gross Floor Area

| <input type="checkbox"/> | Current As Of | Value | Temporary Value? | Revised By | Revised Date |
|--------------------------|--|--|--------------------------|------------|--------------|
| <input type="checkbox"/> | 08/01/2015  (to present) | 20000 <input type="text"/> Sq. Ft.  | <input type="checkbox"/> | Eric Smith | 10/16/2015 |
| <input type="checkbox"/> | 01/01/1985  (through 7/31/2015) | 0 <input type="text"/> Sq. Ft.  | <input type="checkbox"/> | Eric Smith | 10/16/2015 |


✕ [Delete Selected Entries](#)

★ Weekly Operating Hours

| <input type="checkbox"/> | Current As Of | Value | Temporary Value? | Revised By | Revised Date |
|--------------------------|---|------------------------|--------------------------|------------|--------------|
| <input type="checkbox"/> | 01/01/1985  (to present) | 0 <input type="text"/> | <input type="checkbox"/> | Eric Smith | 10/16/2015 |

✕ [Delete Selected Entries](#)

★ Number of Workers on Main Shift

| <input type="checkbox"/> | Current As Of | Value | Temporary Value? | Revised By | Revised Date |
|--------------------------|---|------------------------|--------------------------|------------|--------------|
| <input type="checkbox"/> | 01/01/1985  (to present) | 0 <input type="text"/> | <input type="checkbox"/> | Eric Smith | 10/16/2015 |

✕ [Delete Selected Entries](#)

Save Corrections

Edit Property – Correct Mistakes

Summary

Details

Energy

Water

Waste & Materials

Goals

Design

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
100,000 Sq. Ft.

Occupancy:
95%

Edit

Unique Identifiers (IDs)

Portfolio Manager ID:
5941103

Custom IDs: None

Standard IDs: None

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Edit

Additional Information

Federal Property:
Not Set

Service & Product Provider:
None ([Find a SPP](#))

Edit

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 | 90,000 ft² | I want to... |
| ▶ Vacant Office Use | Office | 20,000 ft² | I want to... |
| Property GFA (Buildings): | | 110,000 | 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.

Edit Property – Correct Mistakes

History Log for Building Use

Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (campus), you need to [update these Property Use Details in BOTH the parent and child properties](#).

★ Gross Floor Area

| <input type="checkbox"/> | Current As Of | Value | Temporary Value? | Revised By | Revised Date |
|--------------------------|---------------------------------|----------------|--------------------------|------------|--------------|
| <input type="checkbox"/> | 08/01/2015 (to present) | 80000 Sq. Ft. | <input type="checkbox"/> | Eric Smith | 10/16/2015 |
| <input type="checkbox"/> | 01/01/1985 (through 7/31/2015) | 100000 Sq. Ft. | <input type="checkbox"/> | Eric Smith | 10/16/2015 |

[Delete Selected Entries](#)

★ Weekly Operating Hours

| <input type="checkbox"/> | Current As Of | Value | Temporary Value? | Revised By | Revised Date |
|--------------------------|---------------------------------|-------|--------------------------|------------|--------------|
| <input type="checkbox"/> | 08/01/2015 (to present) | 55 | <input type="checkbox"/> | Eric Smith | 10/16/2015 |
| <input type="checkbox"/> | 01/01/1985 (through 7/31/2015) | 65 | <input type="checkbox"/> | Eric Smith | 10/16/2015 |

[Delete Selected Entries](#)

★ Number of Workers on Main Shift

| <input type="checkbox"/> | Current As Of | Value | Temporary Value? | Revised By | Revised Date |
|--------------------------|---------------------------------|-------|--------------------------|------------|--------------|
| <input type="checkbox"/> | 08/01/2015 (to present) | 200 | <input type="checkbox"/> | Eric Smith | 10/16/2015 |
| <input type="checkbox"/> | 01/01/1985 (through 7/31/2015) | 229 | <input type="checkbox"/> | Eric | 10/16/2015 |

Save Corrections

Edit Property – Correct Mistakes

Property Uses and Use Details

 [View as Diagram](#)

Add Another Type of Use

Add

| Name | Primary Function | Gross Floor Area | Action |
|---------------------------------------|------------------|------------------|-------------------------|
| ▼ Building Use | Office | 96,658 ft² | I want to... ▼ |
| | Value | Current As Of | Temporary Value? |
| Gross Floor Area | 80000 ft² | 08/01/2015 | No |
| Weekly Operating Hours | 55 | 08/01/2015 | No |
| Number of Workers on Main Shift | 200 | 08/01/2015 | No |
| Number of Computers | 200 | 08/01/2015 | No |
| Percent That Can Be Heated | 50 % or more | 08/01/2015 | No |
| Percent That Can Be Cooled | 50 % or more | 08/01/2015 | No |
| ▼ Vacant Office Space | Office | 3,342 ft² | I want to... ▼ |
| | Value | Current As Of | Temporary Value? |
| Gross Floor Area | 20000 ft² | 08/01/2015 | No |
| Weekly Operating Hours | 0 | 01/01/1985 | No |
| Property GFA (Buildings): | | 100,000 | (used to calculate EUI) |
| Property GFA (Buildings and Parking): | | 100,000 | |

Edit Property – Correct Mistakes

SummaryDetailsEnergyWaterWaste & MaterialsGoalsDesign

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
100,000 Sq. Ft.

Occupancy:
95%

Edit

Unique Identifiers (IDs)

Portfolio Manager ID:
5941103

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


Property Uses and Use Details

[View as Diagram](#)

| Name | Property Use Type | Gross Floor Area | Action |
|---------------------------|-------------------|------------------|---|
| ▶ Building Use | Office | 80,000 ft² | <input type="text" value="I want to..."/> |
| ▶ Vacant Office Use | Office | 20,000 ft² | <input type="text" value="I want to..."/> |
| Property GFA (Buildings): | | 100,000 | (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.

Correcting/Updating Properties with Multiple Buildings (Campuses)

- When you have a property set up as a campus (e.g., “child” buildings that comprise a “parent” property), you will need to update/correct use details at both the building and property levels.
- If you make a change at the building level, it will not automatically “roll up” to the property level

Pop Quiz!

1. If you are editing your building record to indicate that the total number of building occupants had increased, you would use which of the following options?
 - a. Correct mistakes
 - b. Update with new information

2. If you are editing your building record because you had entered 10,000 ft² of floorspace instead of 100,000 ft², you would use which of the following options?
 - a. Correct mistakes
 - b. Update with new information

3. True or False: in a multi-tenant office building, you would enter each tenant as a separate property use within the building record.
 - a. True
 - b. False

Pop Quiz - Answers

1. If you are editing your building record to indicate that the total number of building occupants had increased, you would use which of the following options?

- a. Correct mistakes
- b. **Update with new information**

An increase in building occupants is a meaningful change in a property use detail over time. You would want to treat this as an “update” so that Portfolio Manager can use the correct occupant count to calculate metrics before and after the change.

2. If you are editing your building record because you had entered 10,000 ft² of floorspace instead of 100,000 ft², you would use which of the following options?

- a. **Correct mistakes**
- b. Update with new information

Fixing a number you entered incorrectly doesn't require a timestamp. You do not want the tool to use the incorrect value; you just want to correct it.

3. True or False: in a multi-tenant office building, you would enter each tenant as a separate property use within the building record.

- a. True
- b. **False**

In general, you should enter as few property use types as possible when setting up a property. You should benchmark the all of the floorspace within this property as a single “Office” entry unless any of the special cases on slide 9 are in place at your building. Only in that case would you break out the affected spaces as separate line items for property use.

How To

- Edit property data
- Correct or update property use details
- [Use the Data Quality Checker](#)
- Share property data

Address Data Quality Alerts

- Portfolio Manager includes built-in features to help users input data correctly, such as:
 - Alerts
 - Tips
 - Easily accessible definitions
- Intended to help catch common data entry mistakes

Gross Floor Area Alert

The screenshot shows the 'Details' tab of a property's Energy Star profile. On the left, the 'Basic Information' section shows 'Construction Status: Test property that is one single building' and 'Occupancy: 95%'. A red circle highlights the 'Property GFA - Self-Reported: 100,000 Sq. Ft.' field, with a red arrow pointing to it. On the right, the 'Property Uses and Use Details' section has a 'View as Diagram' link and an 'Add Another Type of Use' button. Below this is a table with the following data:

| Name | Property Use Type | Gross Floor Area | Action |
|---------------------|-------------------|------------------|--------------|
| ▶ Building Use | Office | 100,000 ft² | I want to... |
| ▶ Vacant Office Use | Office | 10,000 ft² | I want to... |

At the bottom of the table, a red circle highlights the summary row: 'Property GFA (Buildings): 110,000 (Used to calculate EUI)'.

Gross Floor Area originally entered as 100,000 sq. ft. for this property


When “Vacant Space” was added, the Gross Floor Area went up to 110,000 sq. ft.


Edit primary building GFA to equal 90,000 sq. ft, to keep total floor area consistent

Meter Data Alerts

Manage Bills (Meter Entries) for [Supermarket A-1](#)

You may select one of your meters to get started. Or, if you are coming here from your meter list, a meter may already be selected.

 Electricity has an overlap where 09/01/2005 precedes 05/03/2006. Please remove the overlap by adjusting the dates of your energy bills. For help, see this [FAQ](#).

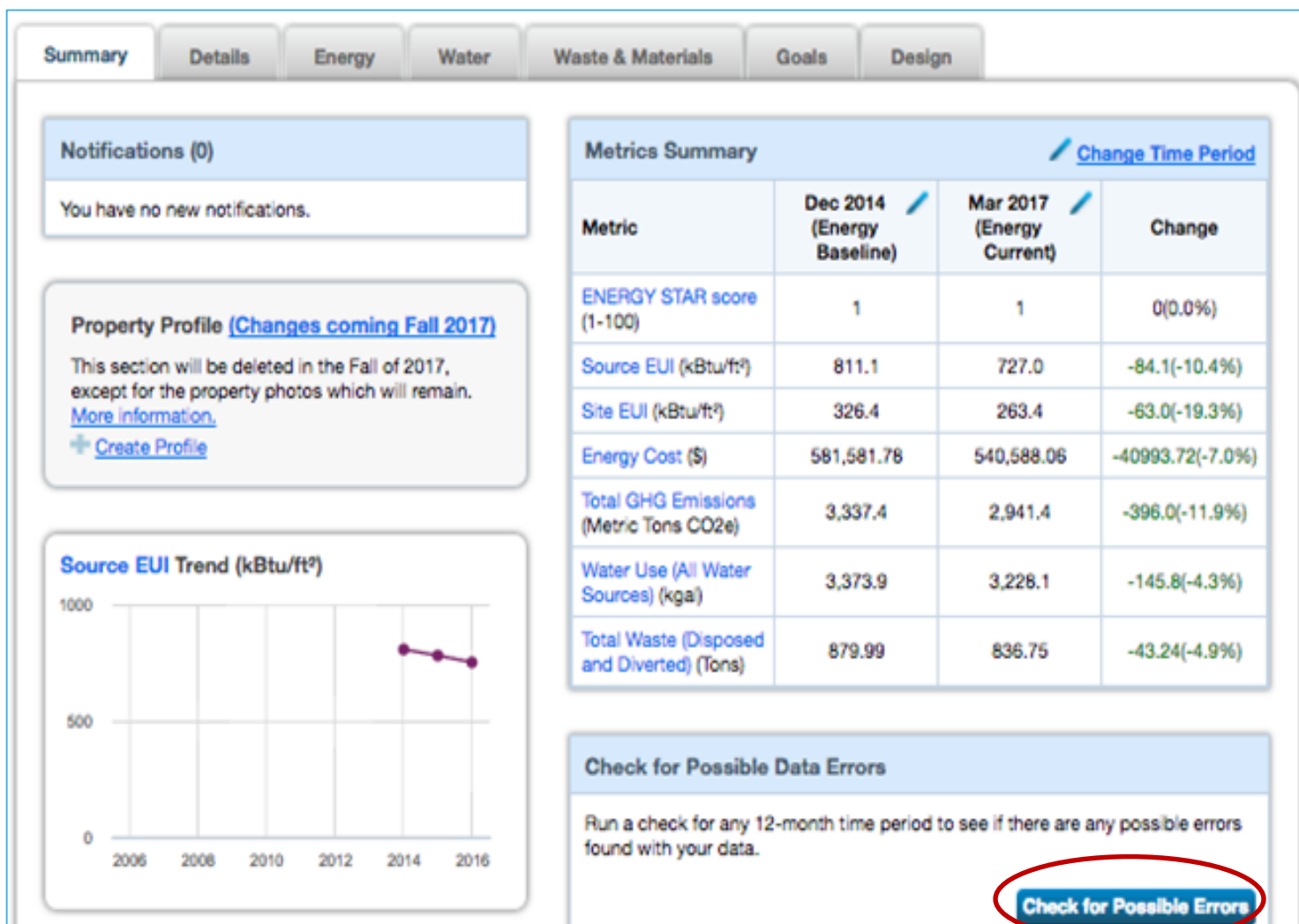
 Electricity has a gap of 35 days between the dates of 11/30/2005 and 01/05/2006. Please close the gap by adjusting the dates of your energy bills. For help, see this [FAQ](#).

Electricity

Display Year(s): 2006 Show All Years

| | Start Date | End Date | Usage kWh (thousand Watt-hours) | Cost (\$) | Estimation | Green Power | Last Updated |
|--|------------|------------|------------------------------------|-----------|--------------------------|--------------------------|----------------------|
| <input type="checkbox"/> | 4/5/2005 | 5/3/2006 | 366,720 | | <input type="checkbox"/> | <input type="checkbox"/> | 6/4/2015 facciolo |
| <div><div></div>Electricity has an overlap where 09/01/2005 precedes 05/03/2006. Please remove the overlap by adjusting the dates of your energy bills. For help, see this FAQ.</div> | | | | | | | |
| <input type="checkbox"/> | 9/1/2005 | 9/30/2005 | 427,920 | | <input type="checkbox"/> | <input type="checkbox"/> | 6/4/2015 facciolo |
| <input type="checkbox"/> | 10/1/2005 | 10/31/2005 | 369,840 | | <input type="checkbox"/> | <input type="checkbox"/> | 6/4/2015 facciolo |
| <input type="checkbox"/> | 11/1/2005 | 11/30/2005 | 384,960 | | <input type="checkbox"/> | <input type="checkbox"/> | 6/4/2015 facciolo |
| <div><div></div>Electricity has a gap of 35 days between the dates of 11/30/2005 and 01/05/2006. Please close the gap by adjusting the dates of your energy bills. For help, see this FAQ.</div> | | | | | | | |
| <input type="checkbox"/> | 1/5/2006 | 2/3/2006 | 354,960 | | <input type="checkbox"/> | <input type="checkbox"/> | 6/4/2015 facciolo |
| <input type="checkbox"/> | 2/4/2006 | 3/6/2006 | 357,360 | | <input type="checkbox"/> | <input type="checkbox"/> | 6/4/2015 facciolo |

Data Quality Checker



Data Quality Checker

MyPortfolio

Sharing

Reporting

Recognition

Data Quality Checker for [City Hall](#)


The Data Quality Checker inspects the information you have entered for your property that corresponds to a 12 month period you select. It identifies irregularities in the information and provides you with links to help you improve the quality of the information you have provided. Start by selecting a property in your account and then tell us which time period you'd like to inspect. Then, we'll walk through any potential issues. When you are done, you can save any explanations for each time period you run through the checker.

Select Timeframe & Run Checker

Each data check is based on 12 months of property use and bills (meter consumption) information. To run the checker, select the month and year and click the button to run (or re-run) the checker.

Year Ending: * Aug ▼ 2013 ▼ [Re-Run Checker](#)

Alerts for Year Ending on 08/31/2013

 Congratulations! Based on the information you have provided for this property within the year ending in 08/31/2013, no potential problems were found. You do not need to make any revisions.

[Save Check for this Period](#) [Cancel](#)

Why Run the Checker?

Checking the quality and completeness of the information you have entered for your property provides a more accurate picture of the energy efficiency of your property and what areas might need improvement.

.....

About Timeframes

All checks are based on one full calendar year of [use](#) and [meter](#) information. The [year ending date](#) represents the last day of the 12 month period. If you have already run checks on period ending dates and those dates are not showing up in this list, the use or meter information has probably been edited and now does not reflect a full year of information.

.....

Pop Quiz!

4. The Data Quality Checker does all of the following except:
- a. Identifies erroneous or anomalous data
 - b. Reviews all entries for an individual property for a given 12-month period
 - c. Fixes any data errors at your property
 - d. Runs the same checks used during the ENERGY STAR Certification process

Pop Quiz!

4. The Data Quality Checker does all of the following except:
- a. Identifies erroneous or anomalous data
 - b. Reviews all entries for an individual property for a given 12-month period
 - c. **Fixes any data errors at your property**
 - d. Runs the same checks used during the ENERGY STAR Certification process

The Data Quality Checker will alert you to potentially erroneous data, but it will not fix it for you. You will need to fix the item(s) in question, using the guidance provided by the Checker.

How To

- Edit property data
- Correct or update property use details
- Use the Data Quality Checker
- [Share property data](#)

3 Steps to Sharing Properties

1. Confirm you are connected to the person you want to share with on the Contacts page. If needed, send a connection request by clicking on “Add Contact”
2. Share one or more of your properties with your connected contacts and specify the level of access the contacts will be granted to view and/or edit your properties
3. Review shared properties on the **Sharing** tab

Note: You can reference the 5 minute video, “How to Share Properties in Portfolio Manager” at www.energystar.gov/buildings/training as a refresher, if needed.

Add and Connect with Contacts

The screenshot shows the Energy Star Portfolio Manager interface. The top navigation bar includes links for [Account Settings](#), [Contacts](#) (circled in red), [Help](#), and [Sign Out](#). The main content area is titled 'My Contacts' and includes a search bar with the text 'Search for new contacts'. Below the search bar, there is a paragraph explaining the purpose of the contacts page: '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.'

Below the paragraph, there are buttons for 'Share', 'Edit', 'Delete', 'Add Contact', and 'Add Organization'. A table lists the contacts:

| All | Name | Organization |
|-----|---|---------------------------------|
| C | Company on Main Commercial Real Estate | Company on Main |

At the bottom of the table, there are buttons for 'Share', 'Edit', 'Delete', 'Add Contact', and 'Add Organization'. The footer includes social media links for Twitter, Facebook, YouTube, and LinkedIn, along with links for [Contact Us](#), [Privacy Policy](#), [Browser Requirements](#), and [ENERGY STAR Buildings & Plants Website](#).

Find Contacts

MyPortfolio

Sharing

Reporting

Recognition

Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account. If you find the person, send a Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact you would like to add does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

Find Contact in Portfolio Manager

Search using any of the criteria below.

Name:

Organization:

Username:

Email:

[Cancel](#)

i Connecting with Other Users

If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily [share your property](#) information with your contacts.

.....

i Keeping Personal Contacts

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

.....

i Organizing Personal Contacts by

Send Connection Request to Contact

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:

Organization:

Username:

Email Address:

Search

 Tamela Reuter
Consultant with The Clark Group, LLC

Connect

<<

>>


Page 1 of 1

<<

>>

50

1 - 1 of 1

 **Tip**
Can't find what you are looking for? Try adjusting your search criteria.

Connection Request Confirmed

The screenshot displays the Energy Star Portfolio Manager interface. At the top, the logo and navigation tabs (MyPortfolio, Sharing, Reporting, Recognition) are visible. A green notification box states: "A connection request has been sent to Tamela Reuter. When Tamela accepts your request, you will be able to share property information." Below this, the "Search Results" section is partially visible. The main content area shows a "Properties (9)" section with an "Add a Property" button, a "Source EUI Trend (kBtu/ft²)" graph, and a "Notifications (2) View All" section. The notification section contains a message: "You have sent a connection request to Tamela Reuter. Once they have accepted the request, you will be able to share properties with Tamela Reuter." This notification is circled in red. Below the notification, there is a "Properties (9) (Count includes 1 child properties. Expand caret to view.)" section with an "Add a Property" button.

ENERGY STAR®
PortfolioManager®

Welcome gracevinsons: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | Sharing | Reporting | Recognition

A connection request has been sent to Tamela Reuter.
When Tamela accepts your request, you will be able to share property information.

Search Results
The results of your search are listed below. If you find a contact, you can send them a connection request. If they accept, you will be able to share properties with them as an unconnected contact.

MyPortfolio | Sharing | Reporting | Recognition

Properties (9)
[Add a Property](#)

Source EUI Trend (kBtu/ft²)
300
200

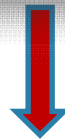
Notifications (2) [View All](#)

You have sent a connection request to [Tamela Reuter](#). Once they have accepted the request, you will be able to share properties with [Tamela Reuter](#).
[Cancel](#) [Clear](#)

Properties (9) (Count includes 1 child properties. Expand caret to view.)
[Add a Property](#)

Contact Receives and Accepts Connection Request

The screenshot shows the 'MyPortfolio' interface with tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The 'Properties (1)' section contains an 'Add a Property' button. The 'Source EUI Trend (kBtu/ft²)' section is partially visible. The 'Notifications (1)' section displays a connection request from 'Tamela Reuter' with 'Accept' and 'Reject' buttons.



The screenshot shows the 'MyPortfolio' interface after accepting the connection request. The 'Notifications (1)' section now displays a confirmation message: 'You have accepted a connection request from Tamela Reuter . The connection has been made and will now show in your Contacts list. If needed, you may now share property information with this contact.'

Connection Confirmed

MyPortfolio


Sharing

Reporting

Recognition

Properties (1)
[Add a Property](#)

Notifications (1)



You are connected to [Tamela Reuter.](#)

[Clear](#)

Sharing Tab – Overview

MyPortfolio **Sharing** Reporting Recognition

My Shared Properties (0)

Share (or Edit Access to) a Property

Set Up Web Services/ Data Exchange





Download Sharing Report

Sharing Notifications (0)

You have no new notifications.

More About Sharing

No properties are currently shared between you and [your contacts](#). Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)

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Share Your Property: Multiple Properties

One
Property
Multiple
Properties
All
Properties

MyPortfolio

Sharing


Reporting

Recognition

Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.

1



Select Properties


We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

Multiple Properties

Select Properties

[Selected Properties: 0](#)

2



Select People (Accounts)


Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

DATA REQUESTER, ENERGY STAR
ENERGY STAR TRAINING, ENERGY

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your [connected contacts](#) appear in this list.

3



Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

* ☐ I am doing a single share OR I want to choose the same permissions for all of my share requests.
☐ I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permissions.

Continue

Cancel

i

Sharing with Accounts

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

i

Exchanging Data

To get started, first connect with an [organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left. **Note, you cannot share in bulk for "exchange data."**

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.
Data Exchange - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Share Your Property: Multiple Properties

ENERGY STAR® Portfolio Manager®

Welcome Kaye Lynch-Sparks: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

Select Properties

| <input type="checkbox"/> | Name | Primary Function | State/Province |
|--------------------------|------------------------------|--------------------|----------------|
| <input type="checkbox"/> | Big Bank | Bank Branch | VA |
| <input type="checkbox"/> | Kids Daycare | Pre-school/Daycare | NC |
| <input type="checkbox"/> | Office 1 | Office | DC |

Selected Properties: 0 ([View Selection](#))

Filter Properties (3)

[Filter by Group](#) ([Create New Group](#))

- ☐ Group 1 (1)
- ☐ Group 2 (2)

Filter by Primary Function

- ☐ Bank Branch (1)
- ☐ Office (1)
- ☐ Pre-school/Daycare (1)

Filter by Construction Status

- ☐ Existing (2)
- ☐ Project (1)

Filter by State/Province

- ☐ District of Columbia (D.C.) (1)
- ☐ North Carolina (1)
- ☐ Virginia (1)

[Apply Selection](#) [Cancel](#)



ENERGY STAR® Portfolio Manager®

Select Properties

| <input type="checkbox"/> | Name | Primary Function | State/Province |
|--------------------------|--------------------------|------------------|----------------|
| <input type="checkbox"/> | Big Bank | Bank Branch | VA |
| <input type="checkbox"/> | Office 1 | Office | DC |

Selected Properties: 0 ([View Selection](#))

Filter Properties (3)

[Filter by Group](#) ([Create New Group](#))

- ☐ Group 1 (1)
- ☒ Group 2 (2)

Filter by Primary Function

- ☐ Bank Branch (1)
- ☐ Office (1)
- ☐ Pre-school/Daycare (1)

Filter by Construction Status

- ☐ Existing (2)
- ☐ Project (1)

Filter by State/Province

- ☐ District of Columbia (D.C.) (1)
- ☐ North Carolina (1)
- ☐ Virginia (1)

[Apply Selection](#) [Cancel](#)

Choose Permissions – Option 1



Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

* ☒ **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).

☒ [Read Only Access](#)

☐ [Full Access](#)

☐ [Custom Access](#) (meters are all shared at the same level)

☐ Exchange Data (You can share in bulk for exchanging data [here](#) or you can assign permissions one by one for each property using the radio button below.)

☐ Remove Access

☐ **Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.

Share Property(ies)

[Cancel](#)

Choose Permissions – Option 2



Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

- ☐ **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).
- ☒ **Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give [Exchange Data](#) permission.



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.



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) | None | Read Only Access | Full Access | Custom Access | Exchange Data |
|---|-----------------------|----------------------------------|----------------------------------|-----------------------|---------------|
| ▼ 3 main street (4104902) | | | | | |
| ENERGY STAR TRAINING ENERGY STAR TRAINING | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> | <input type="radio"/> | |
| ▼ Main Street Hospital (4101387) | | | | | |
| ENERGY STAR TRAINING ENERGY STAR TRAINING | <input type="radio"/> | <input checked="" 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.

Data Exchange - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

.....

Share Property(ies)

[Cancel](#)

Click arrow to show/hide permission options

Choose permissions

Sharing Notifications Appear in Both Accounts

User who shares
a property
receives a
notification

The screenshot shows the 'Sharing' tab selected in the top navigation bar. A green message box at the top states: "You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required." Below this, the 'My Shared Properties' section shows '(6)' properties with buttons for 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. The 'Sharing Notifications (1)' section contains one notification: 'Hotel Building 1 - Sharing request sent to [ENERGY STAR TRAINING](#)'. To the right of this notification are 'Cancel' and 'Clear' buttons. A red arrow points from the text 'User who shares a property receives a notification' to the notification entry.

User with whom
a property is
shared also
receives a
notification

The screenshot shows the 'Sharing' tab selected in the top navigation bar. The 'My Shared Properties' section shows '(1)' property with buttons for 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. The 'Sharing Notifications (1)' section contains one notification: 'Hotel Building 1 - Shared from [Andrew Schulte](#) (Full Access)'. To the right of this notification are 'Accept' and 'Reject' buttons. A red arrow points from the text 'User with whom a property is shared also receives a notification' to the notification entry.

Edit/Update Sharing Permissions

MyPortfolio
Sharing
Reporting
Recognition

My Shared Properties
(3)

Share (or Edit Access to) a Property
Set Up Web Services/ Data Exchange
Download Sharing Report

Sharing Notifications (0)

You have no new notifications.

Overview of Shared Properties [Learn more about Sharing Properties](#)

By Contact
By Property

Owned By (PDA):
Shared By:
In Group:

| Name | My Permissions | Property Data Administrator | Can I Share With Others? | # of People With Access | Action |
|------------------------------------|---|--|--------------------------|-------------------------|---|
| 123 main street | Property Data Administrator | ICF International (ENERGY STAR TRAINING) | Yes | 2 | <input type="text" value="I want to..."/> |
| Sample Office | Property Data Administrator | ICF International (ENERGY STAR TRAINING) | Yes | 2 | <input type="text" value="I want to..."/> |
| Sample Supermarket | Property Data Administrator | ICF International (ENERGY STAR TRAINING) | Yes | 3 | <input type="text" value="I want to..."/> |

Sharing Rules: Granting and Editing Access

| Access Level | Ability to Edit Share Permissions |
|-----------------------------|---|
| Property Data Administrator | Can edit anyone's sharing permissions |
| Full Access | Can edit anyone's sharing permissions except for the Property Data Administrator |
| Read Only | Cannot edit anyone's access |
| Custom | Can only edit sharing permissions for those people with whom they directly shared |
| Exchange Data | Can only edit sharing permissions for those people with whom they directly shared |

→ No other users can edit access for the Property Data Administrator

Share Forward


- Full Access
 - **Always** includes the ability to share forward
- Read Only Access
 - **Never** includes the ability to share forward
- Custom Access
 - Ability to share forward is an optional right
 - **You choose** if you want people to share forward
- Exchange Data
 - Ability to share forward is an optional right
 - **You choose** if you want people to share forward

Transfer Ownership

[MyPortfolio](#) [Sharing](#) [Reporting](#) [Recognition](#)

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | [Map It](#)
Portfolio Manager Property ID: 4437651 | Primary: Supermarket/Grocery Store
Year Built: 1991

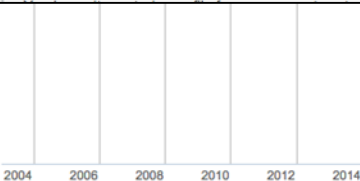
 Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/ft²)
Current EUI: [N/A](#)
Baseline EUI: [N/A](#)

Summary Details Meters Goals Design

Notifications (0)

You have no new notifications.

Property Profile


2004 2006 2008 2010 2012 2014


Metrics Summary

| Metric | Baseline (Not Available) | Current (Not Available) | Change |
|---------------------------|-------------------------------|-------------------------------|--------|
| ENERGY STAR score (1-100) | Not Available | Not Available | N/A |
| Source EUI (kBtu/ft²) | Not Available | Not Available | N/A |
| Site EUI (kBtu/ft²) | Not Available | Not Available | N/A |


unless you would like to track performance separately. This will only be possible if you have your buildings metered individually. Also keep in mind that if you enter individual buildings, you will still need to keep use and meter information about the property as a whole up to date in order to receive accurate metrics about your property (and, in some cases, to apply for the ENERGY STAR). [Learn more about tracking multi-building properties.](#)


Sharing this Property

 Share


 **More About Sharing**

You haven't [shared your property](#) yet. Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)

 [Transfer Ownership](#)

 [Download Property to Excel](#)

Transfer Ownership

 ENERGY STAR®
PortfolioManager®

Welcome facciolos: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

[MyPortfolio](#) | [Sharing](#) | [Reporting](#) | [Recognition](#)

Transfer Ownership of Your Property


You may want to transfer ownership of your property to another person if you are no longer going to manage the property in Portfolio Manager. In order to transfer the property, the other person must have an account and be a connected contact.

- 1 Property to Transfer: Supermarket A-1
- 2 Select Person (Account) to Transfer to

Which person (account) do you want to transfer this property to?

Select contact from my contacts book:

*

 **Transfer to a Connected Contact**

The person that you are transferring your property to must be one of your connected contacts. If the person is not connected to you, you can always [connect with them](#).

.....

[Transfer Property](#) [Cancel](#)

Pop Quiz!

5. True or False: in order to share a property record with another Portfolio Manager user, you must first be connected to them.
 - a. True
 - b. False

6. True or False: if you share a property record with another Portfolio Manager user, you must allow them full read/write access to your data.
 - a. True
 - b. False

Pop Quiz!

5. True or False: in order to share a property record with another Portfolio Manager user, you must first be connected to them.

- a. True
- b. False

Before you can “share” a property with another PM user, you must be “connected” at the account level.

6. True or False: if you share a property record with another Portfolio Manager user, you must allow them full read/write access to your data.

- a. True
- b. False

When you share with other PM users, you can provide varying levels of access, including read-only, or a combination of full access and read-only for various elements of your property.

Recap

- In this training, we learned how to:
 - Edit property data
 - Correct or update property use details
 - Use the Data Quality Checker
 - Share property data

Portfolio Manager Help Page

ENERGY STAR® PortfolioManager®

Welcome | [Account Settings](#) | [Contact Us](#) | [Help](#) | [Sign Out](#)

[MyPortfolio](#) | [Sharing](#) | [Planning](#) | [Reporting](#) | [Recognition](#)

Portfolio Manager Help

- [Learn More about Portfolio Manager](#)
Get fact sheets, quick reference guides and other information about how the tool works.
- [Take or View a Training](#)
Sign up for a session or view a recording on a wide variety of topics.
- [Search the Knowledge Base](#)
Browse or search our Frequently Asked Questions.
- [Ask a Question](#)
Send a question or comment to our staff.
- [Check the Glossary](#)
Look up terms used throughout Portfolio Manager.
- [Web Service Documentation](#)
If you exchange data via web services, check out the documentation or get email updates.

Don't forget, we're out there with you! Network with us and other folks who are using Portfolio Manager.

[Like us on Facebook](#) | [Follow Us on Twitter](#) | [View Our YouTube Channel](#)

Technical References

Are you into the math of it all? Learn more about how Portfolio Manager calculates metrics.

- [Source Energy](#)
- [Greenhouse Gas Emissions](#)
- [ENERGY STAR Score](#)
Detailed descriptions for individual property types are available in English at: www.energystar.gov/ScoreDetails. French documents for Canadian models only are available by contacting info.services@nrcan-mcan.gc.ca.

National Median

- [US National Median](#)
- [Canadian National Median](#)
- [Accounting for Climate & Weather](#)
- [Green Power](#)
- [Thermal Conversion Factors](#)
- [Negative Energy Consumption](#)

[Get more documentation on the ENERGY STAR website.](#)

Extra Help

- Visit www.energystar.gov/buildingshelp
 - Expanded list of FAQs
 - Online form to submit technical questions or comments
- Additional Portfolio Manager training resources available at: www.energystar.gov/buildings/training
 - Step-by-step documents (PDF)
 - Access to recorded trainings
 - Information on upcoming trainings
- Register for regular webinars at: <http://esbuildings.webex.com>
- Portfolio Manager Technical Reference Series:
http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_model_tech_desc

COVID-19 and ENERGY STAR Certification

- Health and safety of stakeholders remains EPA's first priority
- Most properties are now eligible to use energy data through **July 31, 2020**
- The following use details must be changed to reflect COVID-19-related changes, with accurate "Current As Of" dates:
 - **Workers on the Main Shift** (FTE Workers for Hospitals)
 - **Weekly Operating Hours** (Weekend Operation for K-12 Schools)
- **Retail Stores** and **Hotels** cannot have been closed for more than 60 days of their application period. More details [here](#).
- 120-day eligibility period has been waived (so you can still use a PED as early as 10/31/2019, even if you can't perform the site visit and submit the application until later this year)
- See www.energystar.gov/covidupdates for more details

New 2020 Certification Deadline

February 10, 2021

Applications submitted by February 10, 2021 will be considered for 2020 certification



ENERGY STAR®

TenantSpace™



A new way to earn EPA recognition for your office's sustainability efforts.

Recognition criteria and rationale

- Estimate energy use
- Meter your space
- Light efficiently
- Use efficient equipment
- Share data with the landlord (if requested)

Thank you for attending!

Questions?

Slides will be sent to all webinar registrants after today's session

If you have any questions on Portfolio Manager
or the ENERGY STAR program, contact us at:

www.energystar.gov/BuildingsHelp