

# Portfolio Manager<sup>®</sup> 201



ENERGY STAR<sup>®</sup>

Portfolio Manager<sup>®</sup>

# 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

**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 <span>▾</span>	Energy Current Date <span>▾</span>	ENERGY STAR Score <span>▾</span>	Site EUI (kBtu/ft <sup>2</sup> ) <span>▾</span>	Source EUI (kBtu/ft <sup>2</sup> ) <span>▾</span>
<a href="#">ABC Office Building</a> 6663053	01/31/2019	65	55.4	132.9
<a href="#">Sample K-12 School (US)</a> 6663269	08/31/2018	85	55.1	104.4
<a href="#">Sample Library (US)</a> 6663268	12/31/2017	NA	97.1	206.8
<a href="#">Sample Office (US)</a> 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](#)

Manage Portfolio

[Transfer ownership](#) of a property that

Source EUI Trend (kBtu/ft<sup>2</sup>)

[Change Metric](#)

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

# 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](#)


**Property Uses and Use Details**

[View as Diagram](#) Add Another Type of Use

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft²	<input type="button" value="I want to..."/>
Property GFA (Buildings):		<b>100,000</b>	<a href="#">Used to calculate EUI</a>
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.

[Save Notes](#)

[Delete this Property](#)

⚠ Caution! Deleting your property is permanent.

# Edit Property – Basic Information

**ENERGY STAR**  
ENERGY STAR **PortfolioManager™**

Welcome Account Settings | Contacts | Help | Sign Out  
Language: English | Français

MyPortfolio Sharing Planning Reporting

### Edit Insurance Office

#### Address Information

\* Name: Insurance Office

\* Country: United States

\* Street Address: 5201 Blue Lagoon Dr

\* City/Municipality: Arlington

\* County:

\* State/Province: Virginia

\* Postal Code: 20221

#### Property Use Detail

\* What is the primary function of your property? Office

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?

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:

Gross Floor Area:    
**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:

Occupancy:  %

### 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

### 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

**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

**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, Restaurant, and Service 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"/> 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="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="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.

[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

The screenshot displays the 'Property Uses and Use Details' section of the Energy Star Property Manager interface. A red circle highlights the 'Add Another Type of Use' button and the table below it. The table lists two property uses: 'Building Use' and 'Vacant Office Use', both categorized as 'Office'. The 'Building Use' has a Gross Floor Area of 100,000 ft², while 'Vacant Office Use' has 0 ft². Below the table, the total Property GFA (Buildings) is 100,000 ft², and Property GFA (Parking) is 0 ft². A note indicates that the EPA-Calculated Property Type is 'Office'.

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	100,000 ft²	I want to...
▶ Vacant Office Use	Office	0 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 - Self-Selected: Office  
Property Type - EPA Calculated: Office

## 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 <sup>2</sup>	I want to... <input type="button" value="▼"/>
▶ Vacant Office Space	Office	0 ft <sup>2</sup>	I want to... <input type="button" value="▼"/>
Property GFA (Buildings):		100,000 (used)	<input type="button" value="I want to..."/> <input type="button" value="Update with New Information"/> <input type="button" value="View Update History"/> <input type="button" value="Correct Mistakes"/> <input type="button" value="Delete use"/>
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" 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" 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](#) | Add Another Type of Use [Add](#)

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 EU)**

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
★ <b>Gross Floor Area</b>	100000 Sq. Ft. (as of 01/01/1981)	<input type="text" value="90,000"/> Sq. Ft. <input type="button" value="v"/>	<input type="text"/> <input type="button" value="calendar"/>	<input type="checkbox"/>
★ <b>Weekly Operating Hours</b>	65 (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"/>
★ <b>Number of Workers on Main Shift</b>	140 (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"/>
★ <b>Number of Computers</b>	140 (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"/>
<b>Percent That Can Be Heated</b>	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"/>
★ <b>Percent That Can Be Cooled</b>	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

Property Uses and Use Details

[View as Diagram](#)

Name	Property Use Type	Gross Floor Area	Action	
▼ Office	Office	97,479 ft <sup>2</sup>	I want to... ▼	
	<b>Value</b>	<b>Current As Of</b>	<b>Temporary Value?</b>	
★ Gross Floor Area	90000 ft <sup>2</sup>	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 ft <sup>2</sup>	I want to... ▼	
	<b>Value</b>	<b>Current As Of</b>	<b>Temporary Value?</b>	
★ Gross Floor Area	10000 ft <sup>2</sup>	05/01/2018	No	

Updated Gross Floor Area

Updated Gross Floor Area



# Edit Property – Update With New Information

The screenshot displays the 'Details' tab of a property management interface. It is divided into several sections:


- Basic Information:** Shows 'Construction Status' as 'Test property that is one single building'. 'Property GFA - Self-Reported' is 100,000 Sq. Ft. (circled in red). 'Occupancy' is 95%. An 'Edit' button is present.
- Unique Identifiers (IDs):** Shows 'Portfolio Manager ID' as 5941103 and 'Custom IDs' as None. A note explains that users can select from Portfolio Manager's Standard IDs or create up to three Custom IDs. An 'Edit' button is present.
- Additional Information:** Shows 'Federal Property' as 'Not Set' and 'Service & Product Provider' as 'None (Find a SPP)'. An 'Edit' button is present.
- Property Uses and Use Details:** Features a 'View as Diagram' link and an 'Add Another Type of Use' dropdown. A table lists uses: 'Building Use' (Office, 90,000 ft²) and 'Vacant Office Use' (Office, 10,000 ft²). Below the table, 'Property GFA (Buildings): 100,000 (used to calculate EUI)' and 'Property GFA (Parking): 0' are shown. A note indicates that a spreadsheet template can be used to add multiple uses. A pie chart titled 'Property GFA by Use' shows 'Office: 100%'.
- Property Type:** Shows 'Property Type - Self-Selected' as 'Office' and 'Property Type - EPA Calculated' as 'Office'. A note states that the EPA-Calculated Property Type is used for metrics.
- Property Notes:** A text area for notes on the 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](#)    Add Another Type of Use

Name	Primary Function	Gross Floor Area	Action
▶ Building Use	Office	98,329 ft <sup>2</sup>	I want to... <input type="button" value="v"/>
▶ Vacant Office Space	Office	1,671 ft <sup>2</sup>	I want to... <input type="button" value="v"/>
Property GFA (Buildings):		100,000 (used f	I want to... Update with New Information View Update History <b>Correct Mistakes</b> 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="text"/>	<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="text"/>	<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](#)

### 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.

### 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](#)

### 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.](#)

### Additional Information

**Federal Property:**  
Not Set

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

[Edit](#)

### 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 <input type="text"/> Sq. Ft. <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015
<input type="checkbox"/>	01/01/1985  (through 7/31/2015)	100000 <input type="text"/> Sq. Ft. <input type="text"/>	<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="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015
<input type="checkbox"/>	01/01/1985  (through 7/31/2015)	65 <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"/>	08/01/2015  (to present)	200 <input type="text"/>	<input type="checkbox"/>	Eric Smith	10/16/2015
<input type="checkbox"/>	01/01/1985  (through 7/31/2015)	229 <input type="text"/>	<input type="checkbox"/>	Eric	10/16/2015

**Save Corrections**



# Edit Property – Correct Mistakes

Property Uses and Use Details

[View as Diagram](#)

Name	Primary Function	Gross Floor Area	Action
▼ Building Use	Office	96,658 ft <sup>2</sup>	I want to... ▼
	<b>Value</b>	<b>Current As Of</b>	<b>Temporary Value?</b>
Gross Floor Area	80000 ft <sup>2</sup>	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 ft <sup>2</sup>	I want to... ▼
	<b>Value</b>	<b>Current As Of</b>	<b>Temporary Value?</b>
Gross Floor Area	20000 ft <sup>2</sup>	08/01/2015	No
Weekly Operating Hours	0	01/01/1985	No
Property GFA (Buildings):		100,000	<a href="#">(used to calculate EUI)</a>
Property GFA (Buildings and Parking):		100,000	

# Edit Property – Correct Mistakes

The screenshot shows the 'Edit Property' interface with the following sections:

- Summary** (selected tab)
- Details** (sub-tab)
- Basic Information**:
  - Construction Status: Test property that is one single building
  - Property GFA - Self-Reported: 100,000 Sq. Ft.** (circled in red)
  - Occupancy: 95%
  - [Edit](#)
- Unique Identifiers (IDs)**:
  - Portfolio Manager ID: 5941103
  - Custom IDs: None
  - Standard IDs: None
  - Tip: 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](#)
  - Add Another Type of Use [dropdown] [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	80,000 ft²	I want to... [dropdown]
▶ Vacant Office Use	Office	20,000 ft²	I want to... [dropdown]
Property GFA (Buildings):		<b>100,000</b> (used to calculate EUJ) (circled in red)	
Property GFA (Parking):		0	

  - Tip: To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.
- Property GFA by Use**:
  - Pie chart showing Office: 100%
- Property Type**:
  - Property Type - Self-Selected: Office [Edit](#)
  - Property Type - EPA Calculated: Office
  - Tip: 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.
  - [Text input area]

## 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 ft<sup>2</sup> of floorspace instead of 100,000 ft<sup>2</sup>, 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 ft<sup>2</sup> of floorspace instead of 100,000 ft<sup>2</sup>, 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 a software interface with tabs for Summary, Details, Energy, Water, Waste & Materials, Goals, and Design. The 'Details' tab is active. On the left, under 'Basic Information', the 'Property GFA - Self-Reported' is listed as 100,000 Sq. Ft. with a red exclamation mark icon. A red circle highlights this text, and a red arrow points to it. Below this, 'Occupancy' is listed as 95% with an 'Edit' button. On the right, 'Property Uses and Use Details' is shown. A table lists two uses: 'Building Use' (Office, 100,000 ft²) and 'Vacant Office Use' (Office, 10,000 ft²). Below the table, a summary row shows 'Property GFA (Buildings): 110,000' with a red exclamation mark icon and a link '(used to calculate EUJ)'. A red circle highlights this summary row.

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 EUJ)

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):

	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 faccio/05
<p> 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 <a href="#">FAQ</a>.</p>							
<input type="checkbox"/>	9/1/2005	9/30/2005	427,920		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 faccio/05
<input type="checkbox"/>	10/1/2005	10/31/2005	369,840		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 faccio/05
<input type="checkbox"/>	11/1/2005	11/30/2005	384,960		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 faccio/05
<p> 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 <a href="#">FAQ</a>.</p>							
<input type="checkbox"/>	1/5/2006	2/3/2006	354,960		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 faccio/05
<input type="checkbox"/>	2/4/2006	3/6/2006	357,360		<input type="checkbox"/>	<input type="checkbox"/>	6/4/2015 faccio/05

# Data Quality Checker

Summary
Details
Energy
Water
Waste & Materials
Goals
Design

**Notifications (0)**

You have no new notifications.

**Property Profile** [\(Changes coming Fall 2017\)](#)

This section will be deleted in the Fall of 2017, except for the property photos which will remain. [More information.](#)

[+ Create Profile](#)

**Source EUI Trend (kBtu/ft<sup>2</sup>)**

Year	Source EUI (kBtu/ft <sup>2</sup> )
2014	~850
2015	~800
2016	~750

**Metrics Summary** [Change Time Period](#)

Metric	Dec 2014 (Energy Baseline)	Mar 2017 (Energy Current)	Change
ENERGY STAR score (1-100)	1	1	0(0.0%)
Source EUI (kBtu/ft <sup>2</sup> )	811.1	727.0	-84.1(-10.4%)
Site EUI (kBtu/ft <sup>2</sup> )	326.4	263.4	-63.0(-19.3%)
Energy Cost (\$)	581,581.78	540,588.06	-40993.72(-7.0%)
Total GHG Emissions (Metric Tons CO <sub>2</sub> e)	3,337.4	2,941.4	-396.0(-11.9%)
Water Use (All Water Sources) (kga)	3,373.9	3,228.1	-145.8(-4.3%)
Total Waste (Disposed and Diverted) (Tons)	879.99	836.75	-43.24(-4.9%)

**Check for Possible Data Errors**

Run a check for any 12-month time period to see if there are any possible errors found with your data.

[Check for Possible Errors](#)

ENERGY STAR. The simple choice for energy efficiency.

35

# 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: \*   [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](http://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 'Welcome', 'Account Settings', 'Contacts' (circled in red), 'Help', and 'Sign Out'. Below this, the 'MyPortfolio' tab is selected, and a blue arrow points to the 'My Contacts' page. The 'My Contacts' page features a search bar with the text 'Search for new contacts' and a list of contacts. The list has columns for 'Name' and 'Organization'. A single contact is listed: 'Company on Main' with 'Commercial Real Estate' as the organization. Below the list are buttons for 'Share', 'Edit', 'Delete', 'Add Contact', and 'Add Organization'. At the bottom, there are 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'.

ENERGY STAR® PortfolioManager®

Welcome Account Settings **Contacts** Help | Sign Out

MyPortfolio

ENERGY STAR® PortfolioManager®

Welcome Account Settings | Contacts | Help | Sign Out

MyPortfolio Sharing Reporting Recognition

### My Contacts

[Search for new contacts](#)

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.

[Share](#) [Edit](#) [Delete](#) [Add Contact](#) [Add Organization](#)

All	Name	Organization
C	<a href="#">Company on Main</a> Commercial Real Estate	<a href="#">Company on Main</a>

[Share](#) [Edit](#) [Delete](#) [Add Contact](#) [Add Organization](#)

Follow Us [t](#) [f](#) [v](#) [i](#)

[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [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:

**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

The screenshot shows the 'MyPortfolio' section of the Portfolio Manager interface. At the top, there are navigation tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Below these is the 'Search Results' section. A text block explains that clicking 'Connect' sends a request to the person to confirm adding them as a contact. To the left is a 'Your Search Criteria' form with fields for Name, Organization, Username, and Email Address, and a 'Search' button. To the right, a search result is displayed for 'Tamela Reuter', a Consultant with The Clark Group, LLC, with a 'Connect' button. Below the search result is a pagination bar showing 'Page 1 of 1' and a dropdown menu set to '50'. A 'Tip' icon and text are located at the bottom left of the search results area.

**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

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

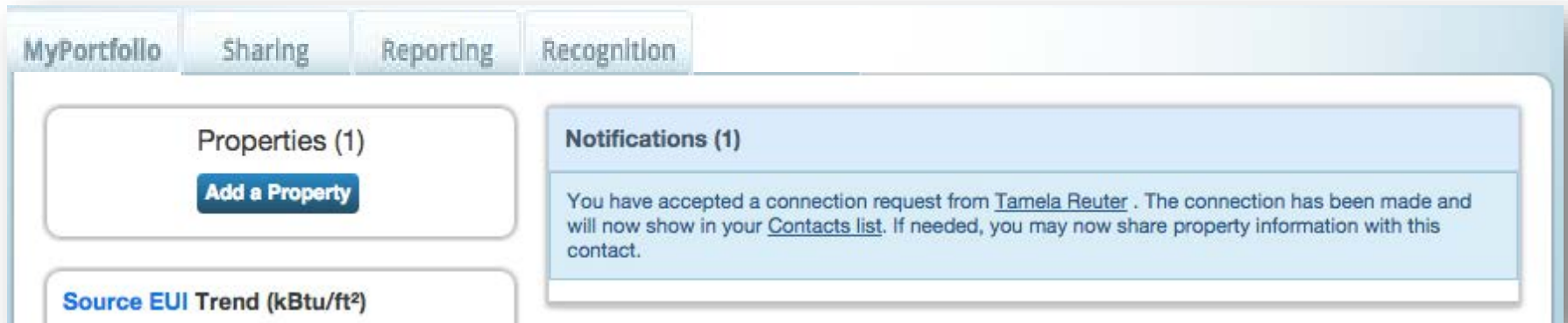
# Connection Request Confirmed

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 is highlighted with a red circle, containing the text: "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 dashboard area shows a "Properties (9)" section with an "Add a Property" button, a "Source EUI Trend (kBtu/ft²)" chart, and a "Notifications (2) View All" section. A notification in the "Notifications" section is highlighted with a red circle, stating: "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 includes "Cancel" and "Clear" buttons. Below the notifications, there is another "Properties (9)" section with an "Add a Property" button and a note: "(Count includes 1 child properties. Expand carets to view.)".

# Contact Receives and Accepts Connection Request



The screenshot shows the 'MyPortfolio' interface with tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. On the left, there is a 'Properties (1)' section with an 'Add a Property' button and a 'Source EUI Trend (kBtu/ft²)' chart. On the right, the 'Notifications (1)' section displays a notification: 'Tamela Reuter would like to connect with you.' To the right of this notification are two buttons: 'Accept' and 'Reject'.



The screenshot shows the 'MyPortfolio' interface after the connection request has been accepted. 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


The screenshot shows the 'Sharing' tab in a web application. At the top, there are four tabs: 'MyPortfolio', 'Sharing' (which is active), 'Reporting', and 'Recognition'. Below the tabs, the main content area is divided into two columns. The left column is titled 'My Shared Properties (0)' and contains three blue buttons: 'Share (or Edit Access to) a Property' (circled in red), 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. The right column has a light blue header 'Sharing Notifications (0)' with the text 'You have no new notifications.' below it. Underneath is a section titled 'More About Sharing' with an information icon and text explaining that no properties are currently shared and providing a link to 'Learn more about exchanging data.' At the bottom left, there are social media icons for Twitter, Facebook, YouTube, and LinkedIn, with the text 'Follow Us' to their left. At the bottom right, there are links for 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.


# Share Your Property: Multiple 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](#)

### 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.

### 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."**

### 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.

One Property  
Multiple Properties  
All Properties



# Share Your Property: Multiple Properties

Welcome Kaye Lynch-Sparks: Account Settings | Contacts | Help | S

### Select Properties

<input type="checkbox"/>	Name	Primary Function	State/Province
<input type="checkbox"/>	<a href="#">Big Bank</a>	Bank Branch	VA
<input type="checkbox"/>	<a href="#">Kids Daycare</a>	Pre-school/Daycare	NC
<input type="checkbox"/>	<a href="#">Office 1</a>	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](#)



### Select Properties

<input type="checkbox"/>	Name	Primary Function	State/Province
<input type="checkbox"/>	<a href="#">Big Bank</a>	Bank Branch	VA
<input type="checkbox"/>	<a href="#">Office 1</a>	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
<div style="display: flex; align-items: center;"> <div style="margin-right: 5px;">▼</div> <div>3 main street (4104902)</div> </div> <div style="margin-left: 20px; font-size: 0.8em;"> <a href="#">ENERGY STAR TRAINING ENERGY STAR TRAINING</a> </div>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<div style="display: flex; align-items: center;"> <div style="margin-right: 5px;">▼</div> <div>Main Street Hospital (4101387)</div> </div> <div style="margin-left: 20px; font-size: 0.8em;"> <a href="#">ENERGY STAR TRAINING ENERGY STAR TRAINING</a> </div>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

#### Who gets to Share Forward?

**Full Access** - Automatically includes "Share Forward" rights

**Read Only** - Automatically does NOT include "Share Forward" rights

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

**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 in a user's account. At the top, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. A green notification 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, there are two main sections: 'My Shared Properties (6)' and 'Sharing Notifications (1)'. The 'My Shared Properties' section contains three buttons: 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. The 'Sharing Notifications' section contains a notification for 'Hotel Building 1 - Sharing request sent to ENERGY STAR TRAINING' with 'Cancel' and 'Clear' buttons. A red arrow points from the text 'User who shares a property receives a notification' to the notification box.

User with whom a property is shared also receives a notification

The screenshot shows the 'Sharing' tab in a user's account. At the top, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Below this, there are two main sections: 'My Shared Properties (1)' and 'Sharing Notifications (1)'. The 'My Shared Properties' section contains three buttons: 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. The 'Sharing Notifications' section contains a notification for 'Hotel Building 1 - Shared from Andrew Schulte (Full Access)' with '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 box.

# 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):

Anyone

Shared By:

Anyone

In Group:

All Properties

Search

Name	My Permissions	Property Data Administrator	Can I Share With Others?	# of People With Access	Action
<a href="#">123 main street</a>	<a href="#">Property Data Administrator</a>	ICF International (ENERGY STAR TRAINING)	Yes	2	I want to... <span style="font-size: 0.8em;">▼</span>
<a href="#">Sample Office</a>	<a href="#">Property Data Administrator</a>	ICF International (ENERGY STAR TRAINING)	Yes	2	I want to... <span style="font-size: 0.8em;">▼</span>
<a href="#">Sample Supermarket</a>	<a href="#">Property Data Administrator</a>	ICF International (ENERGY STAR TRAINING)	Yes	3	I want to... <span style="font-size: 0.8em;">▼</span>

⏪ ⏩

Page 1 of 1

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View 1 - 3 of 3

? This table represents properties in the portfolio that you have shared with others, or that others have shared with you. For complete sharing information, [download the Sharing Report](#) for your portfolio.

## 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/ft<sup>2</sup>)

Current EUI: N/A

Baseline EUI: N/A

Summary

Details

Meters

Goals

Design

Notifications (0)

You have no new notifications.

Metrics Summary

Metric	Baseline (Not Available)	Current (Not Available)	Change
ENERGY STAR score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft <sup>2</sup> )	Not Available	Not Available	N/A
Site EUI (kBtu/ft <sup>2</sup> )	Not Available	Not Available	N/A

Property Profile

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

The screenshot shows the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo and the text 'ENERGY STAR® PortfolioManager®'. At the top right, it says 'Welcome facciolos: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)'. Below the header are four tabs: 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main content area is titled 'Transfer Ownership of Your Property'. It contains a paragraph explaining that ownership can be transferred to another person if they have an account and are a connected contact. There are two numbered steps: 1. 'Property to Transfer: Supermarket A-1' and 2. 'Select Person (Account) to Transfer to'. Under step 2, there is a question 'Which person (account) do you want to transfer this property to?' and the instruction 'Select contact from my contacts book:'. Below this is a dropdown menu with the text '- Select a contact -'. To the right of the dropdown is a blue button labeled 'Transfer Property' and a blue link labeled 'Cancel'. On the right side of the page, there is an information icon (a yellow speech bubble with an 'i') followed by the heading 'Transfer to a Connected Contact'. Below this heading is a paragraph: '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](#).' Below the paragraph is a horizontal row of 15 small grey circles.

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:

\* - Select a contact -

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

**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](#).



## 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 | Contacts | **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](http://www.energystar.gov/ScoreDetails). French documents for Canadian models only are available by contacting [info.services@nrcan-mcan.gc.ca](mailto: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](http://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](http://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](http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_model_tech_desc)

# 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](http://www.energystar.gov/BuildingsHelp)