ENERGY STAR® Portfolio Manager®

"How To" Series
ENERGY STAR for Commercial Buildings

How to Set up Your Property

EPA's ENERGY STAR Portfolio Manager tool helps you measure and track the energy and water use, waste and materials, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the results to identify underperforming buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance.

Setting up your property is quick and easy with Portfolio Manager. There are two ways to set up your property or properties in your portfolio.

- Set up your property manually.
- Upload your property information using spreadsheet templates (creating multiple properties at once and updating default property use details).

Setting up Your Property Manually

To get started, log into Portfolio Manager at https://portfoliomanager.energystar.gov/pm/login.html. Then, follow these instructions to set up your property.

1. Click **Add a Property** on the **MyPortfolio** tab.
2. Select your primary Property Type, the number of buildings, and your Property's construction status. **NOTE**: While all property types can be benchmarked, not all property types are eligible to get an ENERGY STAR Score or apply for ENERGY STAR certification. A full list of eligible property types can be found in the ENERGY STAR Buildings FAQs.
3. Click **Get Started!**
4. Enter basic property information. At the bottom of each page, Portfolio Manager ask questions specific to the primary property type selected. Select the boxes next to the statements that apply to your property. Then click **Continue**.

Property Types

All property types can be benchmarked. For properties with multiple buildings, only hospitals, hotels, K-12 schools, multifamily, and senior living communities are eligible to receive the 1 – 100 ENERGY STAR score. Additional information on campuses can be found in the ENERGY STAR Buildings FAQs.

Property with Multiple Use Types

Only break out separate property use types if they meet one of the following criteria:

1. The Property Use can get an ENERGY STAR Score. (Note: Retail can only get a score if it meets certain requirements, including that it is more than 5,000 sq ft.).
2. It accounts for more than 25% of the property's GFA.
3. It is a vacant/unoccupied Office or Medical Office (and the vacancy is greater than 10% of the property's GFA).
4. The Weekly Hours differ by more than 10% for the same Property Type AND that Property Type can get a score (ex: you have two Office tenants, and their hours differ by more than 10%).

Otherwise, simply include their square footage with the building's primary use.

5. Enter Use Details for your primary property use. Use details with blue stars are required. If necessary, you can use default or temporary values at this time and enter more accurate data later. Additional property use types can also be added at this point (see sidebar for discussion of when to break out a separate property use type). **NOTE**: Mouse over the name of any Use Detail to see a definition.
6. Click **Add Property**. When you have successfully added your property, you will see the property's **Summary** tab.
7. This property has now been added to your portfolio and can be accessed from the **MyPortfolio** tab.

Gross Floor Area

When entering different Building Use Types, be sure that the total square footage for all use types, excluding parking, adds up to equal the entire property Gross Floor Area entered previously. Otherwise, you will get an error message.

Using Spreadsheet Uploads

Adding Properties

1. Log into Portfolio Manager. In your **MyPortfolio** tab, select **Upload and/or update multiple properties at once** from the Manage Portfolio menu on the bottom left of the page.
2. Click on **Add Properties Template** on the right-hand side of the page.
3. Save the spreadsheet file that loads in your browser, and then open it to enter your property information. Be sure to read the Instructions tab before starting. When you are finished entering information, save the spreadsheet to your computer. **NOTE:** Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.

	A	B	C	D
1	Property Name (Required)	Street Address (Required)	Street Address 2 (Optional)	City/Municipality (Required)
2	Jones Elementary Scho	1234 Test Rd		Atlanta
3	Fredrick Office	9382 Peach Ct		Atlanta
4	Independence Hotel	1283 Orange St		Washington D.C.
5	Silver Creek Apartment	9483 Silver Creek St.		Washington D.C.
6				
7				

Figure 1: Spreadsheet template for adding properties

4. When you are ready to upload this file, go back to the **Upload and/or Update Multiple Properties** page (where you originally generated the spreadsheet).
5. Select **Add New Properties** for Type of Upload.
6. Browse to the completed template saved on your computer, click **Open**, and then click **Upload**. **NOTE:** This template uses default values for all property use details. To use non-default values, you will need to use the "Update Property Use Details". Instructions on how to use this template can be found in the next section of this document.

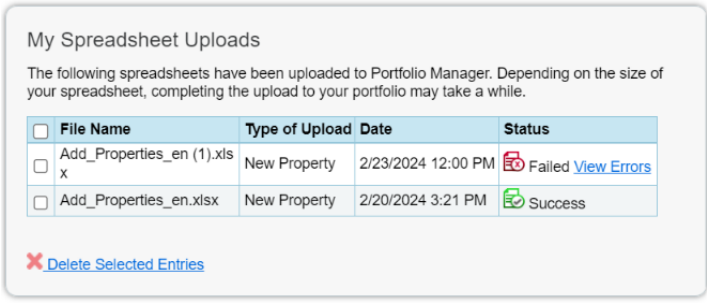

Figure 2: Record of spreadsheet uploads

7. The **My Spreadsheet Uploads** section will appear on the page, so you can view the status of your upload. If the upload fails, you can click on **View Errors** to see what changes need to be made. Once the errors are corrected you can reupload the spreadsheet.

8. Your file will have a status of **Success** if it has been uploaded.
9. You can now view the added properties in the **MyPortfolio** tab.

Updating Default Property Use Details

1. Go to your **MyPortfolio** tab.
2. Click **on Upload and/or update multiple properties** on the lower left-hand side.
3. Click on **Create an Upload Template** on the right-hand side.
4. Select **Update Use Details for Existing Properties**.
5. Select the properties you would like to update (hitting **Apply Selection**) and the information you would like to update.
6. Click **Create & Download Template.**

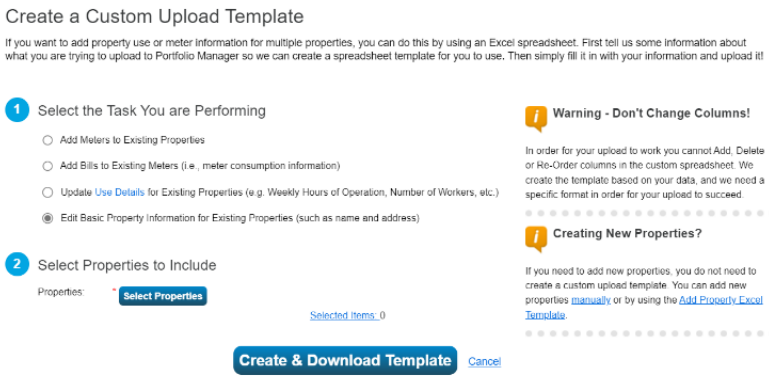

Figure 3: Create a Custom Upload template screenshot

Save the spreadsheet file that loads in your browser, and then open it to enter your property information. **Be sure to read the Instructions tab before starting.** For each property use detail that was entered as a default upon initial property creation, you will need to provide the correct, accurate value.

NOTE: Since Portfolio Manage treats this process as an "update," you will need to change the "Current As of Date" for each updated use detail to be one day later than the date currently specified.

When you are finished entering the updates for your properties, save the spreadsheet.

	E	F	G	H	I	J	K	L	M
1	Use Name (Pre-filled)	Gross Floor Area (Value)	GFA Units	Gross Floor Area Current As of Date	Is Gross Floor Area temporary?	Use a Default for Weekly Operating Hours ?	Weekly Operating Hours (Value)	Weekly Operating Hours Current As of Date	Is Weekly Operating Hours temporary?
2	*Main Office*	*80,000*	*Sq. Ft.*	*01/01/2000*	*No*	*Yes*	*65*	*01/01/2000*	*No*
3	*Main Office*	80,000	*Sq. Ft.*	*01/01/2000*	*No*	*No*	40	1/2/2000	No
4									
5									
6									

Figure 4: Downloaded spreadsheet where uploads should be made and saved

7. When you're ready to upload this file, go back to the **Upload and/or Update Multiple Properties** page (where you originally generated the spreadsheet in Step 2).
8. Select **Update Use Details for Existing Properties** as your Type of Upload.
9. Browse to the completed template you saved on your computer, click **Open**, and then click **Upload**.

10. The **My Spreadsheet Uploads** section will appear on the page, so you can view the status of your upload. If the upload fails, you can click on **View Errors** to see what changes need to be made. Once the errors are corrected you can reupload the spreadsheet.
11. Your file will have a status of **Success** if it has been uploaded.
12. You can now view the updates to your property(ies) in the **MyPortfolio** tab.

Learn More!

- About Portfolio Manager: energystar.gov/benchmark
- ENERGY STAR Guide for Licensed Professionals energystar.gov/LPGuide
- ENERGY STAR for Buildings: energystar.gov/buildings