Using ENERGY STAR® Portfolio Manager®
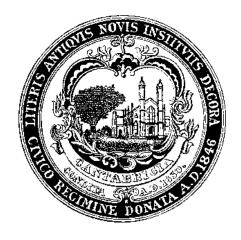
A Workshop for Energy Services Providers

Manage Energy Use and Help Your Clients Meet Building Energy Reporting Requirements in Boston and Cambridge
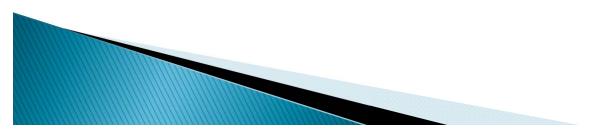
U.S.EPA ENERGY STAR Program
City of Cambridge
City of Boston

February 3, 2015
Cambridge City Hall Annex

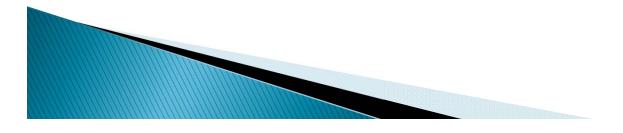# CAMBRIDGE BUILDING ENERGY USE DISCLOSURE ORDINANCE

February 3, 2015

Background on Cambridge BEUDO

- Energy use and greenhouse gas emissions remain high.
- Energy use in commercial, institutional, and large residential buildings accounts for the bulk of energy consumption in Cambridge.
- Energy use in buildings is not transparent; there is not enough information available to the market about building energy performance to drive improvement
- Without comparative data, it is difficult for building owners and tenants to understand how efficient or inefficient their building is
- Annual tracking of energy use enables building owners and tenants to see the trend in their energy use and better understand it.
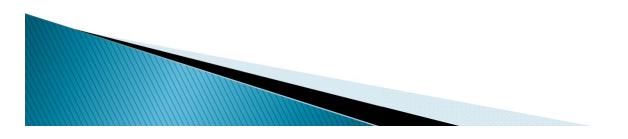- The City lacks good energy use data for policy and planning purposes

BEUDO is a foundational policy

- 2014 Climate Protection Goals & Objectives

- Getting to Net Zero Task Force

- Kendall Square Ecodistrict

- Community Compact for a Sustainable Future

- Climate Change Preparedness & Resilience Plan

- Citywide Plan
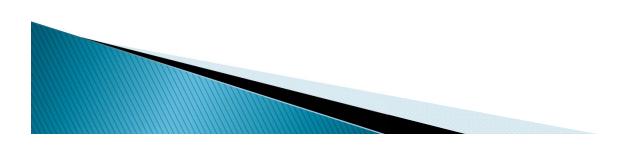
City of Cambridge Energy Use Disclosure Ordinance Basics

‣ Benchmarking, reporting, and disclosure only

‣ Report <u>annually</u> through Energy Star® PortfolioManager™

‣ Municipal buildings report first (10,000 s.f. and larger)

‣ Staged implementation phases: non-residential buildings 25,000-50,000 sf start reporting in 2016.

‣ First year of data is reported but not disclosed. Second year of data will be posted on City website.

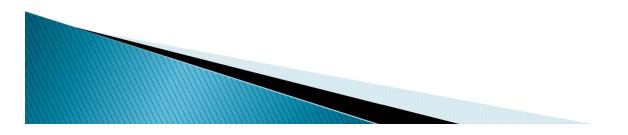‣ Review progress by end of 2018; are buildings improving?

BEUDO Applies to Properties

Buildings Subject to the Ordinance and Deadlines for Compliance

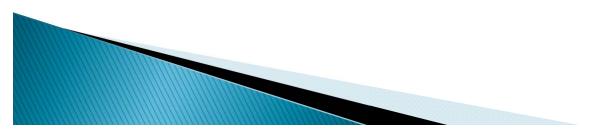| December 31st, 2014	May 1st, 2015	May 1st, 2016 (and every May 1st thereafter)
Municipal buildings 10,000 sq ft or greater	Municipal buildings 10,000 sq ft or greater	Municipal buildings 10,000 sq ft or greater
	Parcels with non-residential buildings singly or together contain 50,000 sq ft or greater	Parcels with non-residential buildings singly or together contain 25,000 sq ft or greater
	Parcels with residential buildings singly or together with 50 units or more	Parcels with residential buildings singly or together with 50 units or more

How to Complete Reporting

- Collect energy and water data for 2014

  ◦ Utilize utility data services

- Set up your building in Portfolio Manager: area, uses, occupancy, etc.

- Upload energy and water data

- Include unique building ID number supplied by the City and any contextual information

- Submit report through Portfolio Manager to City

What's Next

- Community Development Department is working with stakeholders to develop approach to building energy data disclosure.
  - What kinds of contextual information is needed?
  - How to ensure users understand meaning of energy use intensity
  - If you want to participate, email jbolduc@cambridgema.gov
- Analyze 2014 data and issue report
- In 2018, the Community Development Department is required to assess progress on building energy performance to determine if additional actions needed
- Net Zero Task Force recommendations related to BEUDO data

Contact

For more information, contact:

John Bolduc, Environmental Planner
617-349-4628
jbolduc@cambridgema.gov

Bronwyn Cooke, Sustainability Planner
617-349-4604
bcooke@cambridgema.gov

Choosing Thresholds

- Past studies indicate energy use is highly concentrated and that larger buildings account for most energy use; laboratories are energy intensive
- Residential buildings with 50 or more units will be professionally managed

What will the City do with the Data and Information?

- Make the individual data and attribute information available to the marketplace for consideration by owners, tenants, prospective buyers, prospective tenants
- Annual analysis of data to understand energy use patterns and trends in Cambridge and identify opportunities to make the city more efficient
- Plan education and policy initiatives
- Track the City's progress toward reducing our contribution to climate change

Boston's Building Energy Reporting and Disclosure Ordinance

Nikhil Nadkarni

City of Boston

Environment Department

CITY OF BOSTON
Martin J. Walsh, Mayor

GREENOVATE
BOSTON

Today's Key Points

- Requires large buildings to annually report energy and water use

- Reports due May 15, 2015

- Today: go over the tools and resources available

  - Utility data services to provide whole-building data

  - EPA's Portfolio Manager tool to track, understand, and report energy use

- With data in hand, process takes ~2 hours

GREENOVATE
BOSTON

Background

- 2010: Climate Action Leadership Committee & Community Advisory Committee

  – Achieve Boston's greenhouse gas reduction targets for 2020 and beyond

- Recommendation for an energy reporting and disclosure ordinance

- Objective of helping owners, residents, and efficiency programs better understand efficiency opportunities

- Included in Boston's Climate Action Plan in 2011

- Enacted by City Council in May 2013; seventh city to implement

- Advisory Committee of building owners helped develop regulations

GREENOVATE
BOSTON

Key Elements of the Ordinance

- Annual reporting of energy and water use

2013	City of Boston buildings
2014	Nonresidential buildings over 50,000 square feet
2015	Residential buildings over 50,000 square feet or 50 units
2016	Nonresidential buildings over 35,000 square feet
2017	Residential buildings over 35,000 square feet or 35 units

- 2014-5: includes multiple buildings on one lot over 100k sf or 100 units

- Five year action or assessment requirement

- Metrics on energy use made publicly available in fall 2015

GREENOVATE
BOSTON

How To Complete Your Reporting

- Collect energy and water data for 2014

  - Utilize utility data services

- Set up your building in Portfolio Manager: area, uses, occupancy, etc.

- Upload energy and water data

- Include 10-digit tax parcel number and any contextual information

- Submit report through Portfolio Manager to City

GREENOVATE
BOSTON

Important Points to Remember

- Any building over 50,000 sf (gross) or 50 units

  – Or multiple buildings totaling 100,000 sf or 100 units

- Whole building energy and water use

- Year 2014 data

- Buildings will have access to whole-building data from NSTAR, National Grid, and Veolia

  – If entering your own bills: cover the whole year – January 1 to December 31

- Get started early

GREENOVATE
BOSTON

Additional Resources

- Visit boston.gov/eeos/reporting

- List of parcels that must report

- Step-by-step guide to reporting

- Links to EPA resources and videos, and utility data services

- Calendar of future training, including ENERGY STAR online training

Last Year's Outcomes

- Over **880** buildings reported

- Includes offices, warehouses, retail stores, convents, private high schools, and hotels

- Completed by facilities managers, accountants, property managers, and third-party providers

- Feedback collected for process improvements

GREENOVATE
BOSTON

Contact Us

- Visit boston.gov/eeos/reporting

- Send questions to EnergyReporting@boston.gov

- Call the Environment Department at (617) 635-3850

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BOSTON

Whole Building Energy Portal

Boston and Cambridge : Building Energy Disclosure Ordinances (BERDO/BEUDO)

- Owners and managers of large buildings required to annually report their energy and water use and greenhouse gas emissions

  - Annual reporting deadline of May 1 for Cambridge

  - Reporting deadline of May 15 for Boston

- In Boston, buildings required to conduct assessment or action every five years, with exemptions for highly efficient buildings and buildings making significant progress

NSTAR

Whole Building Energy Portal

- Web portal set up by NSTAR.

- Developed for building owners to comply with City Energy Reporting and Disclosure Ordinances.

  - https://www.nu.com/ccberdoapps/EnergyDisclosureReporting/EnergyDisclosureLogin.aspx

NSTAR

Exception Processing

- Buildings that have 3 or less tenants or have a tenant with the majority of energy use in the building (<50%).

- Building owners that do not have a common meter in their buildings.

- The utilities have provided a joint form for both of these exceptions.

NSTAR

Raw data file (.csv format)

Start Date	End Date	Usage	Cost	Estimated Value
1/1/2013	1/31/2013	5600		FALSE
2/1/2013	2/28/2013	5570		FALSE
3/1/2013	3/31/2013	4900		FALSE
4/1/2013	4/30/2013	4700		FALSE
5/1/2013	5/31/2013	4029		FALSE
6/1/2013	6/30/2013	3900		FALSE
7/1/2013	7/31/2013	4502		FALSE
8/1/2013	8/31/2013	5000		FALSE
9/1/2013	9/30/2013	4100		FALSE
10/1/2013	10/31/2013	3800		FALSE
11/1/2013	11/30/2013	3925		FALSE
12/1/2013	12/31/2013	4660		FALSE

James Cater

Utility Program Liaison

City of Boston

Eversource Energy

james.cater@eversource.com

nationalgrid
HERE WITH YOU. HERE FOR YOU

Boston BERDO Support – Requesting Usage from National Grid

February 2, 2015

BERDO Support Webpage

http://www2.nationalgridus.com/psbusiness/berdosupport.jsp

BERDO Usage Request Options

nationalgrid
HERE WITH YOU. HERE FOR YOU

1. Email: BERDOSupport@nationalgrid.com

   - In subject line put <u>BERDO Usage Request</u>

   - In the email, please be sure to include:

     - Your Name & Building Owner Name

     - The Service Address and 10 digit National Grid Account Number of each account being requested

     - Number of Tenants

     - A signed copy of Tenant Authorization Form(if required)

       - For use when fewer than 4 tenants/accounts per property or a single tenant's usage exceeds 50% of Property annual energy usage

     - A signed copy of the Property Owner Verification From

     - Contact Telephone Number

     - File Format requested (.xls or .csv)

     - Email address you would like the file sent

2. Call National Grid's Customer Assistance at: **1-800-732-3400**

   - Please let the Representative know you are calling regarding BERDO

   - Be prepared to provide the same information as listed above.

Ezra McCarthy

Lead Analyst, C&I Program Strategy, MA

ezra.mccarthy@nationalgrid.com

or

BERDOSupport@nationalgrid.com

Using **ENERGY STAR® Portfolio Manager®**

A Workshop for Energy Services Providers

Manage Energy Use and Help Your Clients Meet Building Energy Reporting Requirements in Boston and Cambridge

Leslie Cook, EPA ENERGY STAR

Nils Klinkenberg, The Cadmus Group, in support of EPA

February 3, 2015

Cambridge City Hall Annex

Agenda

- Welcome from Cambridge and Boston
- Getting Whole-Building Data from Energy Utilities
- ENERGY STAR Overview from the U.S. EPA
- Interactive Training: ENERGY STAR Portfolio Manager & Reporting Data to the Cities
- Q&A/Wrap-Up

products
4.8 billion

commercial buildings
24,000

homes
1.5 million

industrial plants
130

ENERGY STAR
Commercial Buildings Program

- Offers a strategic approach to energy management

- Enables building owners, managers, and tenants to save money & protect the environment

- Provides organizations with measurable information on energy savings and greenhouse gas emissions reductions from commercial buildings

- Builds on strong ENERGY STAR brand recognition

- ENERGY STAR on a building = Superior Energy Performance

- Benchmarking is the first step

ENERGY STAR®
PortfolioManager®

- **Management Tool** – Helps business and organizations by offering a platform to:
  - Assess whole building energy and water consumption
  - Track changes in energy, water, greenhouse gas emissions, and cost over time
  - Track green power purchase
  - Share/report data with others
  - Create custom reports
  - Apply for ENERGY STAR certification

- **Metrics Calculator** – Provides key performance metrics to integrate into a strategic management plan
  - Energy consumption (source, site, weather normalized)
  - Water consumption (indoor, outdoor)
  - Greenhouse gas emissions (indirect, direct, total, avoided)
  - ENERGY STAR 1-to-100 score (available for many building types)

→ *Accessible in a free, online secure platform: www.energystar.gov/benchmark*

Benchmarking with ENERGY STAR is the industry standard.

Cumulative through 2014:

- Over 75,000 active Portfolio Manager accounts nation-wide

- More than 400,000 properties benchmarking energy use

- More than 90,000 properties benchmarking water use in Portfolio Manager

- More than 165,000 properties benchmark energy/water using web services

- More than 25,000 properties are ENERGY STAR certified

State and local programs leverage Portfolio Manager.

Value of Benchmarking

Energy Savings in Portfolio Manager

Consistent benchmarking in buildings results in energy savings and improved performance

Energy Use — Average Weather Normalized Souce EUI (kBtu/ft2)

2008 Baseline	2009	2010	2011
267	258	252	248

7% Savings

ENERGY STAR Score — Average 1-100 Score

2008 Baseline	2009	2010	2011
58	61	63	64

6 point increase

Access EPA's Data Trends report series at www.energystar.gov/datatrends

ENERGY STAR Resources that Make Benchmarking *Actionable*

U.S. Environmental Protection Agency
ENERGY STAR® Guide to Energy Efficiency Competitions for Buildings & Plants

- Guidelines for Energy Management
- Energy Efficiency Competition Planning Guide
- Success Stories: Landlords and Tenants
- Communications Strategy Planning Guide
- "Bring Your Green to Work" Engagement Kit
- Action Workbooks for Congregations and Small Businesses

….much more!

energystar.gov/buildings/tools-and-resources

EPA

ENERGY STAR Partnership

- ENERGY STAR partners can co-brand with ENERGY STAR, a brand recognized by 85 percent of Americans

- Partners also gain access to a rich variety of promotional materials

- ENERGY STAR partners commit to:

  – Measure/track/benchmark building energy use

  – Implement a plan to improve energy performance

  – Educate and communicate others about energy efficiency

www.energystar.gov/join

EPA

ENERGY STAR Partnership for Service & Product Providers (SPPs)

- EPA's free and voluntary partnership for energy service providers

  - Access technical support, guidance & training from EPA

  - Use ENERGY STAR logo and off-the-shelf marketing materials

- Differentiate yourself through EPA recognition

  – Get added to EPA's directory of most active partners

  – Publish EPA service and product provider success stories

  – Include your activity in profiles of ENERGY STAR certified buildings

  – Earn ENERGY STAR Partner of the Year

- Requirements to Join

  – Benchmark at least 10 customer buildings in the last 12 months using Portfolio Manager, and/or

  – Earn the ENERGY STAR certification for at least 1 customer building in the last 12 months

Join at: www.energystar.gov/join

ENERGY STAR Recognition

- ENERGY STAR Certification for Buildings

- Designed to Earn the ENERGY STAR

- EPA's National Building Competition

- ENERGY STAR Partner of the Year

Energy Disclosure Laws Create Opportunities for Energy Service Providers

- **Promote Market Awareness of Programs**
  - Reach out to existing customers to encourage understanding, participation and compliance with legislation
  - Demonstrate your expertise to potential clients by being a source of useful information about program requirements
  - Support local government messaging, emphasizing that these initiatives create jobs and stimulate the local economy

Energy Disclosure Laws Create Opportunities for Energy Service Providers

- **Assist Clients with Compliance**

  – Market and deliver benchmarking services

  – Sharpen your skills by attending ENERGY STAR benchmarking training

  – Encourage local professional associations to set up benchmarking support hotlines and training networks

- **Expand Business Opportunities through Enhanced Market Visibility**

  – Create a directory of local energy service providers available to assist building owners in your market

  – Encourage building owners to track and improve their energy performance – achieving long term goals of improved building competitiveness, reduced carbon footprint and job creation

Case Study: Energy Service Providers & Compliance with NYC's LL84

- New York City's Local Law 84 requires all private buildings over 50,000 sq. ft. to report their energy use via Portfolio Manager
  - 12,000+ buildings
  - 2 billion+ SF

- **More than 50% of the City's first year of required benchmarking was done by energy service providers.**

- Professional associations such as the Urban Green Council, City University of NY and the NY chapter of the Association of Energy Engineers provided crucial training and outreach.

planYC

NEW YORK CITY
LOCAL LAW 84
BENCHMARKING
REPORT

SEPTEMBER 2013

EPA

Agenda

- Welcome from Boston and Cambridge
- Getting Whole-Building Data from Energy Utilities
- ENERGY STAR Overview from the U.S. EPA
- Interactive Training: ENERGY STAR Portfolio Manager & Reporting Data to the Cities
- Q&A/Wrap-Up

To Get Started Benchmarking in Portfolio Manager

Required data

- Property Information
  - Primary Function (*Office, Retail, Multifamily Residential)*
  - Name, street address, ZIP/postal code

- Details for each type of property use (*Office, Retail,…*)
  - Gross floor area
  - Use details (*weekly operating hours, number of computers, number of workers on the main shift, etc.*)

- Energy (& water) consumption data
  - Property-specific information
  - All purchased and on-site-generated energy, for all fuel types (*electricity, natural gas, fuel oil #2, …*)

Live Demonstration

See Appendix 1 for screenshots & walkthrough

Troubleshooting

Address Data Quality Alerts

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

Meter Data Alerts

Meter Alerts

- Alert will appear when gaps or overlapping dates are detected in meter entries. Users now have two options:

  – Fix errors that have been identified

  – Accept and continue. Gaps/overlaps in historic data will not affect current benchmarking period

Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost ($)	Estimation	Green Power
1/1/2013	2/1/2013	42000		☐	☐
2/1/2013	2/28/2013	42000		☐	☐
3/1/2013	3/31/2013	42000		☐	☐
4/1/2013	4/30/2013	42000		☐	☐
5/1/2013					☐
6/1/2013					☐
7/1/2013					☐
8/1/2013					☐
9/1/2013	9/30/2013	42000		☐	☐

The **Date Meter became Active** that you entered for D2654 1/1/2011 creates a gap of missing bills for this meter. There is a gap between your **Date Meter became Active** and the earliest bill you entered. If you continue, your metrics may not be able to be calculated until this missing information is entered. Are you sure you want to continue?

OK Cancel

Gross Floor Area Alert

This Property's Overall Use

View as Diagram | Add Another Type of Use | Add

Name	Primary Function	Gross Floor Area	Action
▶ Parking Use	Parking		I want to...
▶ Vacant Space	Office	10000	I want to...
▶ Building Use	Office	100000	I want to...

ℹ️ To add multiple uses and buildings to this property, you can use this spreadsheet template to upload your information.

Gross Floor Area Comparison

⚠️ The total of the Gross Floor Area for your uses does not equal the Gross Floor Area for your property. Learn more.

Use Total GFA | Property GFA

Property GFA: 100,000
Use Total GFA: 110,000

0k 25k 50k 75k 100k 125l

ℹ️ **Keeping Your Property Information up to date**

If your property has more than one building, it is important that you keep your use details updated at both the property and building levels so that your ENERGY STAR score and other metrics are accurate. Learn more about keeping use details up to date.

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

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

Need to edit main "Building Use" to equal 90,000 sq. ft, to keep total floor area consistent

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52

Data Quality Checker

- Added ability to detect errors in meter data or property information
  - Automated alerts for common data issues
  - Run for a specific 12-month period
  - Save time during application process

Troubleshooting Responses to a City Data Request

A response to a data request was created. This new message alerts the user that metrics could not be computed for one or more properties. Then they click "Read more"…

MyPortfolio | Sharing | Planning | **Reporting** | Recognition

Data Request Response Has Missing Metrics (N/A's)

⚠ Your data response contains 32 properties where Site EUI could not be calculated.

When Site EUI cannot be calculated, typically it means there is not 12 full months of complete meter data or there is a problem with your property's Gross Floor Area. These metrics are the basis for other more complicated metrics (such as the ENERGY STAR Score), so other metrics may also be unavailable as a result.

Properties With Missing Metrics (N/A's) (32) (response preview generated 01/21/2015 03:33 PM EST)

4230803	Atlanta Design Demo	12/31/2013	This property does not have any Property Uses (ex: Office, Restaurant). Please add at least one Property Use with complete Use Details (ex: Number of Workers, Number of Computers).
3954907	Cambridge Design	12/31/2012	This property does not have any Property Uses (ex: Office, Restaurant). Please add at least one Property Use with complete Use Details (ex: Number of Workers, Number of Computers).
3954907	Cambridge Design	12/31/2013	This property does not have any Property Uses (ex: Office, Restaurant). Please add at least one Property Use with complete Use Details (ex: Number of Workers, Number of Computers).
1423620	Courthouse test	12/31/2012	The meter 123245 does not have 12 full calendar months of bills for the selected year. Please enter bills for the full 12 months.
1423620	Courthouse test	12/31/2013	The meter 123245 does not have 12 full calendar months of bills for the selected year. Please enter bills for the full 12 months.

After clicking "Read more" the user sees a detailed list where "N/A" is present in the Site EUI field (N/A in the Site EUI field indicates data issues). The links in the list take the user to the specific screen where the data problem can be fixed.

EPA

ENERGY STAR. The simple choice for energy efficiency.

What Would You Like To Do?

I Want to Review/Edit these Properties

You can review individual properties/meters by using the links in the table above or download it to Excel in order to begin troubleshooting these issues.

I Thought I Fixed These Problems- I Want to Generate an Updated Response

If you have made changes to your data since your response was generated (01/21/2015 03:34 PM EST), you will need to re-generate the report in order for these changes to be reflected.

Generate Updated Response

I Want to Submit Anyway

If you have verified that any issues listed in the table above are not the result of a mistake, you can continue submitting your response. Note that an incomplete request could be considered invalid or non-compliant by the requestor so it is strongly encouraged that you fix any issue before proceeding.

Send Response

(You will confirm your response

The user has three options when N/As have been found:

1. **Review and edit properties (using hotlinks or Excel)**
2. **Generate an updated response (they fixed the underlying data problems but didn't complete this step in the process)**
3. **Submit the response with N/As**

EPA

Getting Help with Portfolio Manager

Where to go for Help

- Portfolio Manager Help link (in upper-right on every page):

Account Settings | Contacts | Help | Sign Out

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.

Where to go for Help

- ENERGY STAR Buildings & Plants – Help Portal:
  www.energystar.gov/buildingshelp

- Portfolio Manager resources available at:
  portfoliomanager.energystar.gov

  – Step-by-step documents (PDF)

  – Recorded webinars, short training videos

  – Regular live webinars and online "Office Hours" sessions
  www.energystar.gov/buildings/training

Where to go for Help

- Do you train others on how to use Portfolio Manager? Join the ENERGY STAR **Trainer Community**

GET MORE OUT OF ENERGY STAR TRAINING

Get monthly emails listing upcoming training sessions.

Want to train others? Join the ENERGY STAR Trainer Community to access exclusive resources.

Sign up at
http://www.energystar.gov/buildings/training

EPA

Where to go for Help

Ordinance websites

Boston:

http://www.cityofboston.gov/eeos/reporting/

Cambridge:

http://www.cambridgema.gov/beudo

APPENDIX 1
Live Demonstration

http://www.energystar.gov/benchmark/

How To

– Create an account

– Navigate Portfolio Manager

– Add a property and enter details about it

– Enter energy and water consumption data

– Enter the Energy Reporting ID number for Boston or Cambridge

– Respond to data requests

– Set Goals and Evaluate Results

Create an Account

How To

- – Create an account
- – Navigate Portfolio Manager
- – Add a property and enter details about it
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Navigating Portfolio Manager

Five portfolio level tabs

MyPortfolio	Sharing	Planning	Reporting	Recognition

Five property tabs

Summary	Details	Meters	Goals	Design

Intuitive navigation – multiple
ways to get to the same place

Navigating Portfolio Manager

Portfolio level

Navigating Portfolio Manager

Property level

How To

- – Create an account
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Get Data In

- 3 ways to enter data for your property or portfolio:

  1. Enter data manually
  2. Upload data using spreadsheet templates
  3. Work with 3rd party providers that exchange data directly with Portfolio Manager via web services

Get Data In: *1.* Manually with the help of Portfolio Manager prompts

Get Data In: *2.* Spreadsheet Upload

Get Data In: *3.* Exchanging Data with Portfolio Manager

- Portfolio Manager XML "web services" API* allows service providers to develop software to transfer data into and out of Portfolio Manager automatically
    - Easy upload & efficient management of data for large portfolios

- **Over 150 organizations** have software that is actively exchanging data with Portfolio Manager via web services

- **Over 65 percent of properties benchmarked in Portfolio Manager** in 2013 were benchmarked via web services

- More information is available at:
  http://portfoliomanager.energystar.gov/webservices/home

Application Programming Interface

ΨEPA

Get Data In: Using XML Web Services to Exchange Data

- Enables energy service companies and utilities to exchange data with Portfolio Manager (post and retrieve) to

  – Manage building and energy data for customers

  – Access the ENERGY STAR score and other performance metrics from Portfolio Manager

- Users taking advantage of web services must "connect" and "share" with their web service provider

How Web Services Work

Portfolio Manager Data Entry/Reporting Options

Add a Property (Manually)

Add a Property

Add a Property

Basic Property Information

Check the Statements that Apply

Enter Values for Property Use Details

MyPortfolio: Property Summary Tab

Add and Set up a Property: More than One Building

Use to enter a campus or other collection of non-submetered buildings

Multi-Building Properties (*e.g. a Campus*)

How To

- Create an account
- Navigate Portfolio Manager
- Add a property and enter details about it
- Enter energy and water consumption data
- Enter the Energy Reporting ID number for Boston or Cambridge
- Respond to data requests
- Set Goals and Evaluate Results

MyPortfolio: Property Meters Tab

Add Meters

Answer Questions about Energy Use in Your Property

Enter Additional Information

About your Meters

Click in Table to Edit Meter Information

Add Energy Consumption Information

Expand meter by clicking arrow

Add Meter Entries and Fill in Data

Click the "**+**" to add entries

Upload a spreadsheet, using template

Meters to Add to Total Consumption

Property Meters Tab: Meters Added and Displayed

View Meter Data and Manage Bills for your Property

How To

- Create an account
- Navigate Portfolio Manager
- Add a property and enter details about it
- Enter energy and water consumption data
- Enter the Energy Reporting ID number for Boston or Cambridge
- Respond to data requests
- Set Goals and Evaluate Results

Boston/Cambridge Energy Reporting ID

- Every building has a unique number
- Designate this in Portfolio Manager – building-by-building or with a spreadsheet template

City-Specific Energy Reporting ID

- Click a property name
- Details tab
- Scroll down to:

City-Specific Energy Reporting ID

- Scroll down to:

Standard IDs

Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

Standard ID(s):

ID:

Add Another

City-Specific Energy Reporting ID

City-Specific Energy Benchmarking ID

Enter the number provided by the City for your building or parcel

Standard IDs

Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

Standard ID(s):

| Boston Energy Reporting ID | ▼ | ID: | 1234567890 |

➕ Add Another

Save   Cancel

City-Specific Energy Reporting ID

How To

- Create an account
- Navigate Portfolio Manager
- Add a property and enter details about it
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- Enter the Energy Reporting ID number for Boston or Cambridge
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Submitting Properties to a Data Request

- **Click the Data Request link** sent by the requestor (e.g. City of Boston/City of Cambridge), which will lead to a separate Portfolio Manager login page

Responding to Data Requests

Data Requests Available on the Reporting Tab

After the first login through the separate login page, Data Requests will be listed on the Reporting tab

Create and generate Reports & respond to Data Requests

MyPortfolio | Sharing | Planning | **Reporting** | Recognition

Charts & Graphs

Source EUI
What is the total energy footprint of my properties, including raw fuel associated with generation and transmission?

ENERGY STAR Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Score Card

Templates & Reports (8)

Create a New Template

	Name	Status	Action
	Water Performance	No Report Generated	I want to...
	Sustainabile Buildings Checklist Report	No Report Generated	I want to...
	Performance Highlights	No Report Generated	I want to...
	Partner of the Year Report	No Report Generated	I want to...
	Fuel Performance	No Report Generated	I want to...
	ENERGY STAR Certification Status	No Report Generated	I want to...
	Energy Performance	No Report Generated	I want to...
	Emissions Performance	No Report Generated	I want to...

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Data Request Preview

Reporting Tab

Data Request displays in "Templates & Reports" list

Respond to Data Request

Automatic Confirmation of Data Submittal

From: donotreply@energystar.gov <donotreply@energystar.gov>
Sent: Thursday, February 27, 2014 7:28 AM
To: Nils Klinkenberg
Subject: Receipt for Data Request Submittal

Dear Nils Klinkenberg:

This is to confirm the receipt of the following Data Request:

Response sent: 02/27/2014 7:28 AM

Response includes: 1 properties

Response sent to:

Response sent by:
   Nils Klinkenberg
   The Cadmus Group, Inc.
   7700 Old Georgetown Rd
   Bethesda, MD 20814

Response sent on behalf of:
   Nils Klinkenberg

*Includes spreadsheet attachment of the data submitted.

"Response sent to" field will indicate **City of Boston** or **City of Cambridge**, with an address.

How To

– Create an account

– Navigate Portfolio Manager

– Add a property and enter details about it

– Enter energy and water consumption data

– Enter the Energy Reporting ID number for Boston or Cambridge

– Respond to data requests

– Set Goals and Evaluate Results

Evaluating Results: Reporting Tools

Choose from Pre-set Chart & Graph options
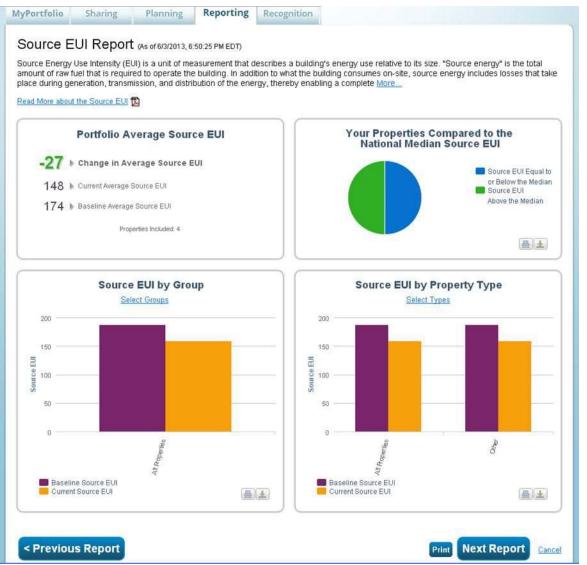
Create and generate Templates & Reports

Download Performance Documents

Reporting: Charts & Graphs

- Each figure can be printed or downloaded for easy insertion into a presentation or document
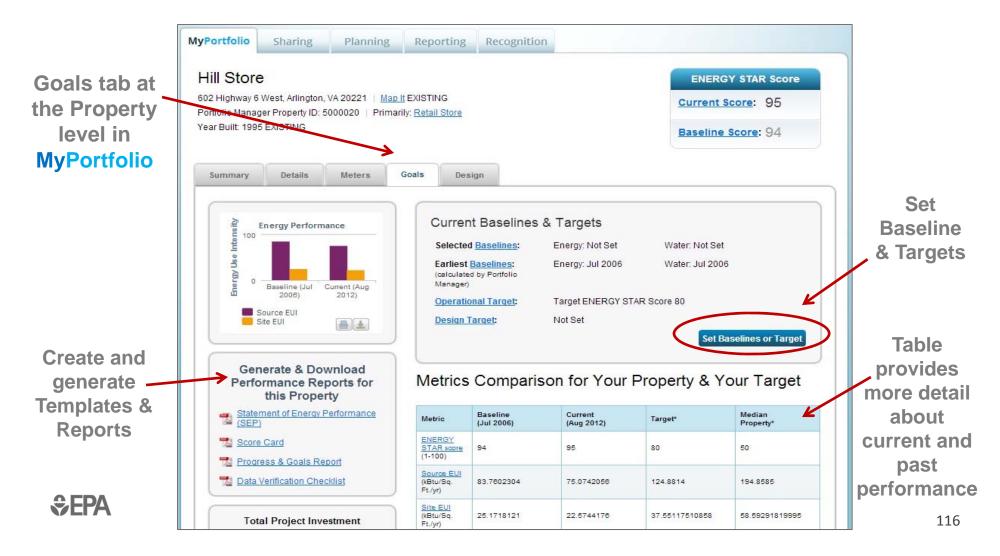- Scroll down to view and export raw data for charts & graphs

Standard Templates & Reports

- Performance Highlights
- Energy Performance
- Emissions Performance
- Water Performance
- Fuel Performance
- ENERGY STAR Certification Status
- Partner of the Year Report
- Sustainable Buildings Checklist Report
- **Custom Reports** with >1000 possible metrics
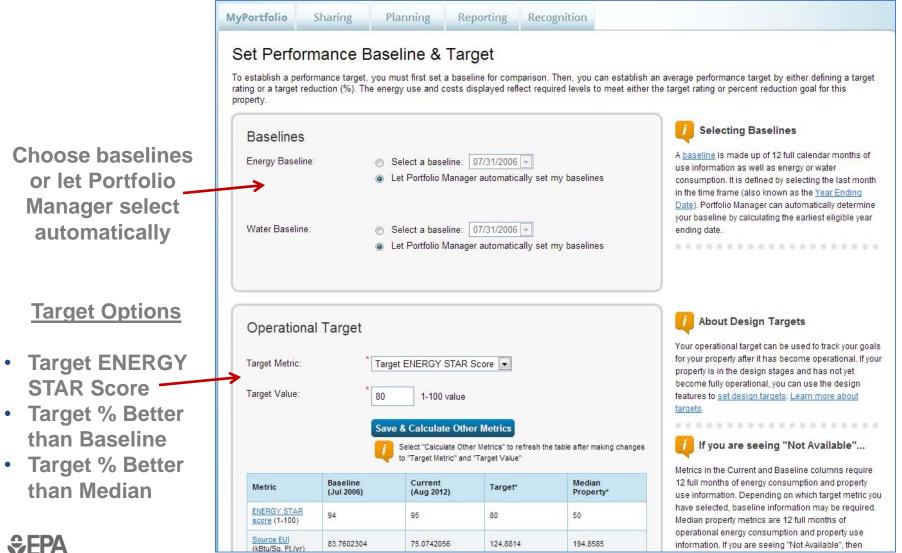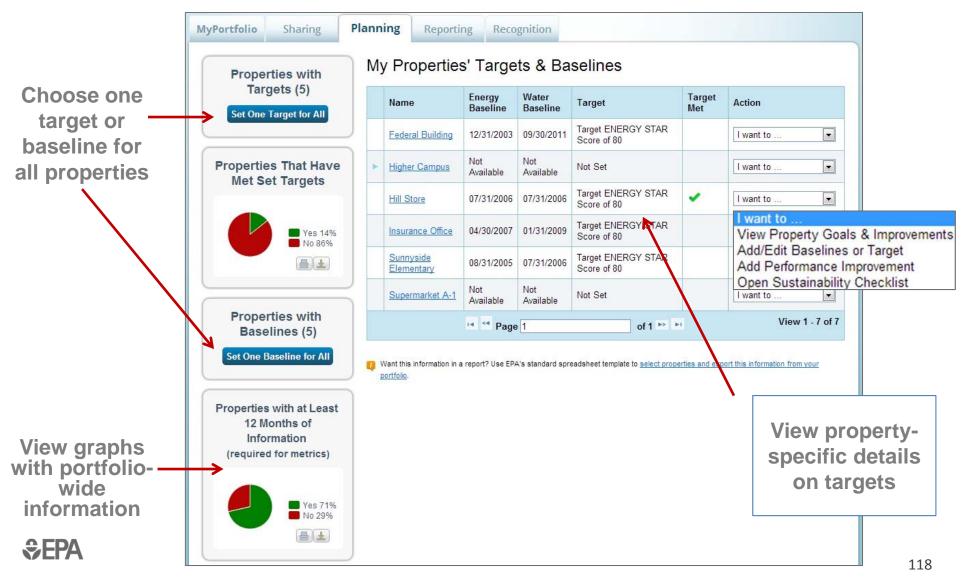
Setting Goals & Tracking Progress: Property-Level

Goals tab at the Property level in MyPortfolio

Create and generate Templates & Reports

Set Baseline & Targets

Table provides more detail about current and past performance

Add/Edit Baselines or Targets

Choose baselines or let Portfolio Manager select automatically

Target Options

- **Target ENERGY STAR Score**
- **Target % Better than Baseline**
- **Target % Better than Median**

Portfolio-Level Targets: The 'Planning' Tab

Choose one target or baseline for all properties

View graphs with portfolio-wide information

View property-specific details on targets

APPENDIX 2

Bulk Data Uploads
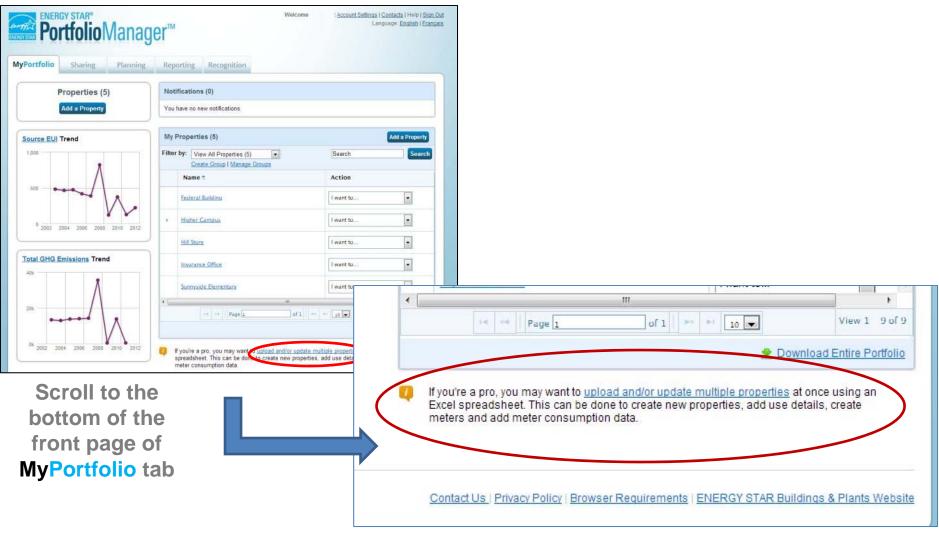# with Spreadsheet Templates

Update Data for Many Properties at Once with the Spreadsheet Upload Feature

- Add *new properties* to your account
  - Download spreadsheet
  - Fill in property information
  - Upload spreadsheet
- *For existing properties:* Add meters / edit meter data / edit basic property details / edit property use details
  - Select properties
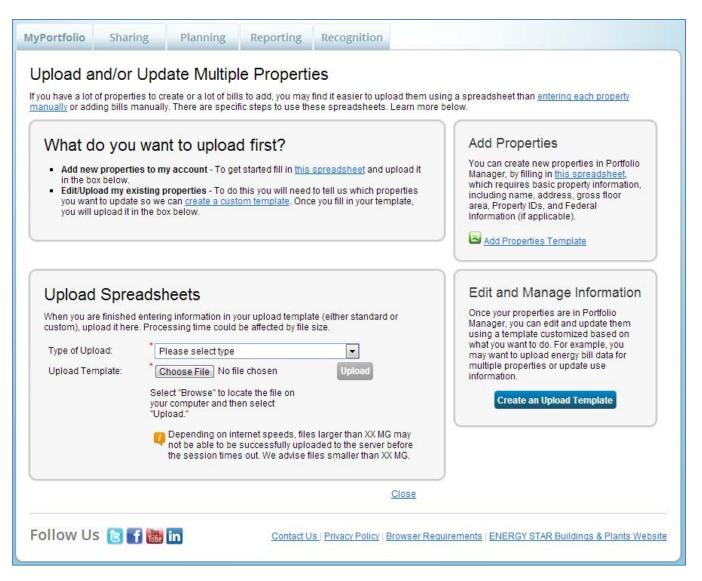 - Download custom spreadsheet
  - Fill in data
  - Upload spreadsheet

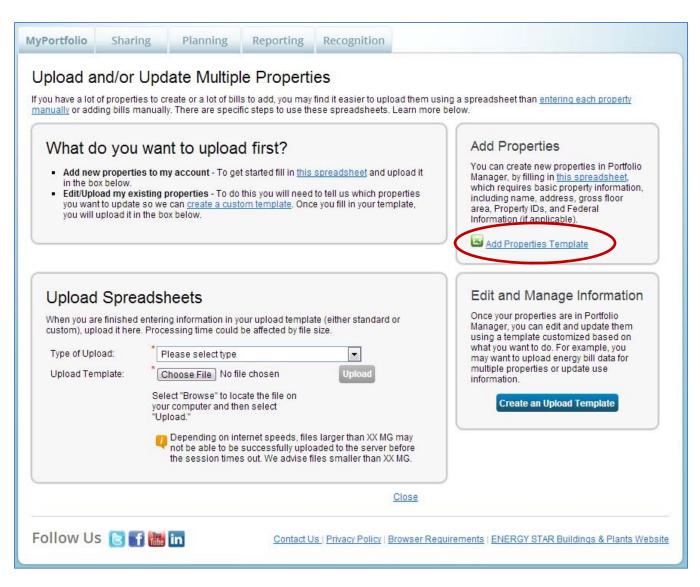# Bulk Data Entry: Spreadsheet Uploads

Scroll to the bottom of the front page of MyPortfolio tab

Spreadsheet Upload/Update: Overview

Add New Properties: Download Spreadsheet Template

Add New Properties: Fill Out Spreadsheet Template

- Complete rows in Excel spreadsheet with information for your properties: name, address, floor area, etc.

Add New Properties: Upload Completed Spreadsheet

Upload filled out templates:

- **Select Type**
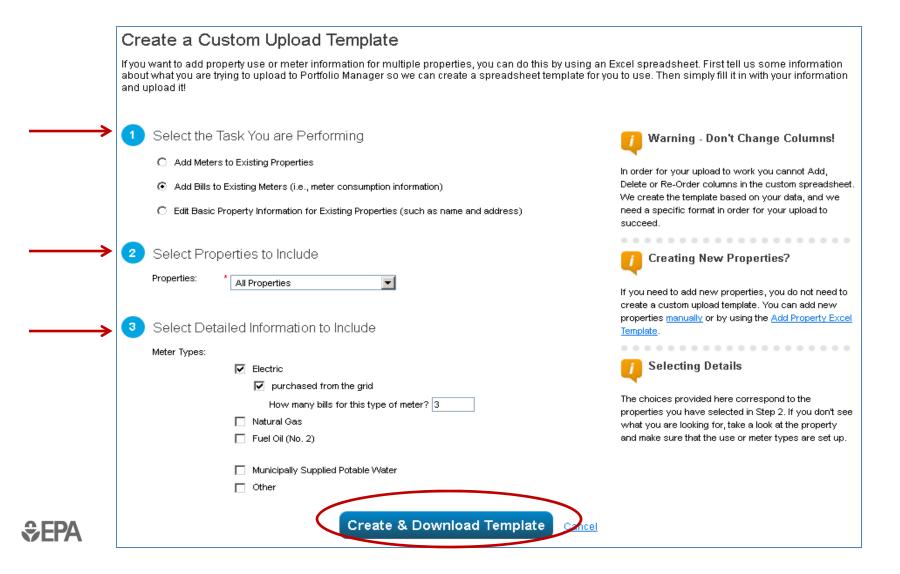- **Upload**

Add Meters / Add Bill Data / Edit Basic Property Info

Add Bills to Existing Meters: Create Custom Upload Template

Add Bills to Existing Meters: Fill Out Spreadsheet Template

	*Property ID	*Property Name	*Meter Name	*Meter Type	*Start Date	*End Date	*Usage	*Meter Unit	Cost	*Estimation	*Green Power?
2	5000017	Hill Store	Electricity	Electricity - Grid Purchase	Last Bill 12/1/201.	12/30/2012	75360	kWh (thousand Watt-hours)	7231.02	No	No
3	5000017	Hill Store	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
4	5000017	Hill Store	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
5	5000018	Federal Building	Electricity	Electricity - Grid Purchase	Last Bill 12/1/201.	12/30/2012	75360	kWh (thousand Watt-hours)	7231.02	No	No
6	5000018	Federal Building	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
7	5000018	Federal Building	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
8	5000019	Insurance Office	Electricity	Electricity - Grid Purchase	Last Bill 1/2/2013	2/1/2013	304080	kWh (thousand Watt-hours)		No	No
9	5000019	Insurance Office	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			
10	5000019	Insurance Office	Electricity	Electricity - Grid Purchase				kWh (thousand Watt-hours)			

- Complete rows in Excel spreadsheet with new bill data for each meter

- Be sure not to add/delete rows or columns, or to change any formatting

EPA