FORT WORTH®

ONCOR

City of Fort Worth/Oncor Portfolio Manager Training

ENERGY STAR® PortfolioManager™

Course Structure

- History of Portfolio Manager
- FWBBC Tracking Details
- How to Use Portfolio Manager
  - Create an Account
  - Add a Property
  - Upload Data
  - Sharing a Facility
  - Setting a Baseline

History of Portfolio Manager

- EPA Software
- Designed for Energy Star Rating
- Energy & Water Tracking
- 2013 Update

energy ENERGY STAR

FWBBC Tracking

- 20% Reduction in Energy
- 2009 Calendar Year Baseline
- Consumption Reduction Recorded Through EUI
- Report Bi-Annually

Create an Account

- Go to: http://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager (Google "Portfolio Manager")
- Select "SIGN UP"
- Fill in Data
- Select "Create My Account"

* Required Input

Add a Connection

- Click "Contacts" in the Upper Right Hand Corner
- "Add Contact"
- Search **COFW-BBC** or **BusinessSmart** in the Username Field
- Click "Connect"

Add a Property

- Click "Add a Property"
- Enter Property Function
- Answer Basic Property Questions
- Enter Operating Details

Uploading Data

- Under the "My Portfolio" tab select "Meters"
- Select "Set Up Meters"
- Select Energy/Water Source(s) and Meters
- Enter Units and Start Date for Each Meter
- Enter your Data Manually or by Upload

Sharing a Facility

- Under the "My Portfolio" Tab Select "Share with Other" on Drop Down Menu
- Select the appropriate number of properties
- Highlight my contact
- "Read Only" Access

How to Set a Baseline

- Select Planning Tab
- Set Energy & Water Baseline
- Select Target and Enter Value

Thank You

- PM Webinars
- http://www.energystar.gov/buildings/tools-and-resources
- Don't Hesitate to Email Questions
- Feedback

Portfolio Manager® Quick Start Guide

EPA's ENERGY STAR Portfolio Manager tool helps you measure and track energy use, water use, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the results to identify under-performing buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance. Follow the steps in this guide to get started using the new Portfolio Manager to benchmark your properties, assess performance, and view results.

Getting Started

Step 1: *Add a Property*

Step 2: *Enter Energy & Water Data*

Step 3: *View Results & Progress*

1 Add a Property

To get started, log in to Portfolio Manager at www.energystar.gov/benchmark. Then, follow these instructions to create a property and to enter property information.

1. Click **Add a Property** on the **MyPortfolio** tab.
2. Answer questions about your property and click **Get Started!**
3. Enter basic property information and select the boxes next to the statements that apply to your property. Then click **Continue.**
4. Enter use details such as gross floor area, operating hours, and number of workers for each type of use. You can use default or temporary values at this time and enter more accurate data later. **NOTE:** Mouse over the use detail to see a definition.
5. Click **Add Property**. When you have successfully added your property, you will see the property's **Summary** tab.

Property Types

All property types can be benchmarked. For properties with multiple buildings only hospitals, hotels, K-12 schools, and senior care communities are eligible to receive the 1 – 100 ENERGY STAR score.

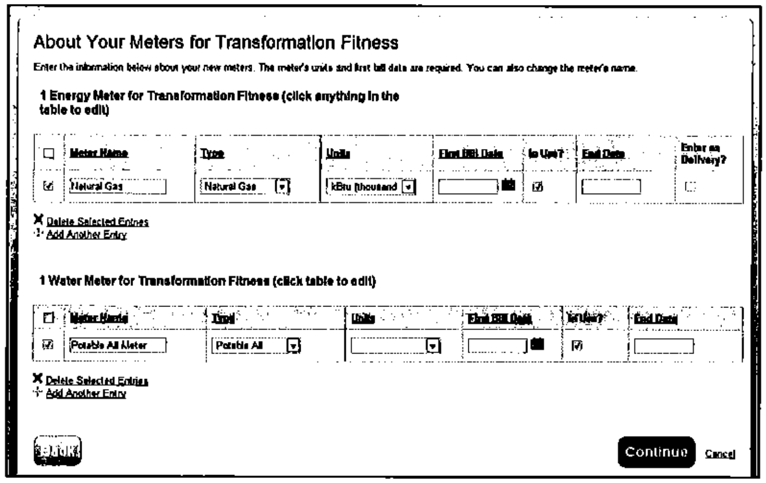
If you have additional types of uses on the property, you can add them at any time.

1. Click the property's **Details** tab, and then select a use type from the **Add Another Type of Use** drop-down menu. Click **Add.**
2. Enter use details for the property and then click **Save Use.**

Properties with Multiple Use Types

Some properties include multiple use types, such as restaurants in hotels, salons in senior care communities, and cafeterias in hospitals. As a general rule, if a certain use commonly occurs in the type of property being benchmarked, simply include it in the square footage of the building's primary use. You do not need to add another type of use.

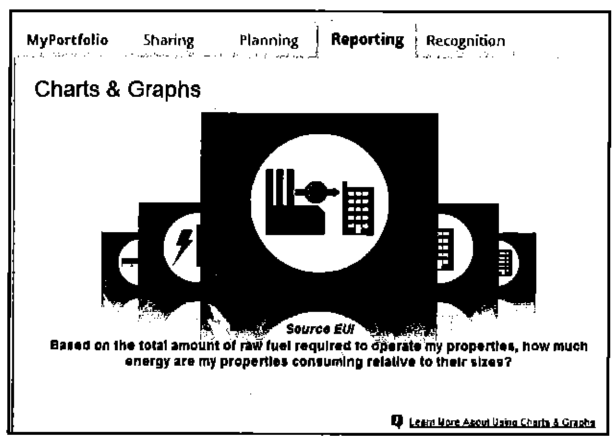
2 Enter Energy & Water Data



To receive an accurate picture of your building's performance, you need to tell Portfolio Manager how much and what kind of energy and water your building consumes. Follow these steps to enter energy and water data for your property.

1. Click on your property from the **MyPortfolio** tab and then select the **Meters** tab.
2. Click **Add Another Meter.**
3. Select the sources of your property's energy and your property's water usage, identify the number of meters, and then click **Get Started!**
4. Click on a meter to enter units and first bill date. If it is a bulk fuel purchase, select the **Enter as Delivery?** checkbox. Then click **Continue.**
5. Click the gray arrow next to each meter to expand the section on the **Your Meter Entries** page. Click **Add Another Entry** under the meter and enter data. Check **Estimation** if you are not including measured data for the entry.
6. Click **Finish Meter Set Up** when you have finished entering information for each meter.
7. Select the boxes of the meters that total your property's energy and water use on the **Meters to Add to Total Consumption** page. Click **Apply Selections.**

3 View Results & Progress



It is easy for you to see trends and to track improvement for your entire portfolio of buildings with a variety of standard graphs and reports in Portfolio Manager. Follow these steps to view reports about your properties and to assess progress.

- ✓ Click the **Reporting** tab to view graphs and reports for a property or portfolio.
- ✓ Click on the **Charts & Graphs** options to instantly see colorful graphs of how your portfolio or group of properties is performing. You can print graphs or download the images to incorporate into a presentation or document.
- ✓ View the **Templates & Reports** section to see a list of available standard reports, including Performance Highlights, Energy Performance, and Water Performance. Select **Generate New Report** from the **Action** drop-down menu to create a spreadsheet.

Learn More!

To learn more about Portfolio Manager, visit www.energystar.gov/benchmark.
To get answers to your questions, visit www.energystar.gov/buildingshelp.

ENERGY STAR® PortfolioManager®

List of Property Types

Portfolio Manager now contains more than 80 property types to choose from when setting up your property. Although the property types eligible to receive the 1-100 ENERGY STAR score have not changed, the expanded list of property types offers you greater ability to define and categorize properties. This is the full list of available property types. **Property types with an asterisk are eligible to receive a 1-100 ENERGY STAR Score.**

Category	Property Type	Detailed Property Type (where needed)
Banking/Financial Services	**Bank Branch***	
	Financial Office*	
Education	Adult Education	
	College/University	
	K-12 School*	
	Pre-school/Daycare	
	Vocational School	
	Other - Education	
Entertainment/Public Assembly	Convention Center	
	Movie Theater	
	Museum	
	Performing Arts	
	Recreation	Bowling Alley
		Fitness Center/Health Club/Gym
		Ice/Curling Rink
		Roller Rink
		Swimming Pool
		Other - Recreation
	Social/Meeting Hall	
	Stadium	Indoor Arena
		Race Track
		Stadium (Closed)
		Stadium (Open)
		Other - Stadium
	Other	Aquarium
		Bar/Nightclub
		Casino
		Zoo
		Other - Entertainment/Public Assembly
Food Sales & Service	Convenience Store	Convenience Store with Gas Station
		Convenience Store without Gas Station
	Restaurant/Bar	Bar/Nightclub
		Fast Food Restaurant
		Restaurant
		Other - Restaurant/Bar
	Supermarket/Grocery Store*	
	Wholesale Club/Supercenter*	
	Other	Food Sales
		Food Service
Healthcare	Ambulatory Surgical Center	
	Hospital	**Hospital (General Medical & Surgical)***
		Other/Speciality Hospital
	Medical Office*	
	Outpatient Rehabilitation/Physical Therapy	
	Senior Care Community*	
	Urgent Care/Clinic/Other Outpatient	

ENERGY STAR® PortfolioManager®

List of Property Types

Category	Property Type	Detailed Property Type (where needed)
Lodging/Residential	Barracks	
	Hotel*	
	Multifamily Housing	
	Prison/Incarceration	
	Residence Hall/Dormitory*	
	Senior Care Community*	
	Single Family Home	
	Other - Lodging/Residential	
Manufacturing/Industrial	Manufacturing/Industrial Plant	
Mixed Use	Mixed Use Property	
Office	**Medical Office***	
	Office*	
	Veterinary Office	
Other	Other	
Parking	Parking	
Public Services	**Courthouse***	
	Drinking Water Treatment & Distribution	
	Fire Station	
	Library	
	Mailing Center/Post Office	
	Police Station	
	Prison/Incarceration	
	Social/Meeting Hall	
	Transportation Terminal/Station	
	Wastewater Treatment Plant*	
	Other - Public Services	
Religious Worship	**Worship Facility***	
Retail	Automobile Dealership	
	Convenience Store	Convenience Store with Gas Station
		Convenience Store without Gas Station
	Mall	Enclosed Mall
		Lifestyle Center
		Strip Mall
		Other - Mall
	Retail Store*	
	Supermarket/Grocery Store*	
	Wholesale Club/Supercenter*	
Services	**Data Center***	
	Personal Services (Health/Beauty, Dry Cleaning, etc)	
	Repair Services (Vehicle, Shoe, Locksmith, etc)	
	Other - Services	
Technology/Science	**Data Center***	
	Laboratory	
	Other – Technology/Science	
Utility	Drinking Water Treatment & Distribution	
	Energy/Power Station	
	Wastewater Treatment Plant*	
	Other - Utility	
Warehouse/Storage	Self-Storage Facility	
	Warehouse/Distribution Center	**Distribution Center***
		Non-Refrigerated Warehouse*
		Refrigerated Warehouse*

How to Get Utility Data Into Portfolio Manager®

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

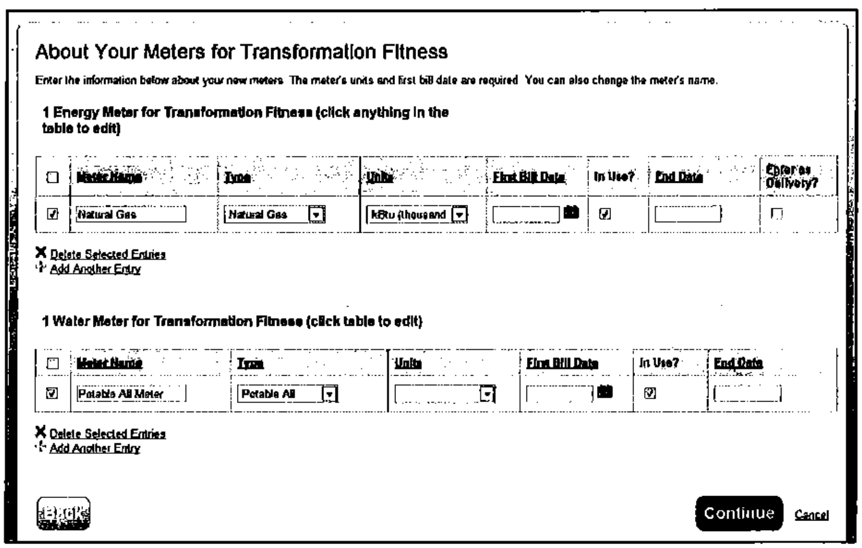
Entering utility data is quick and easy with Portfolio Manager. There are three ways to enter energy and water data for your property or portfolio:

- ✓ Enter data manually (create/update one meter at a time).
- ✓ Upload data using spreadsheet templates (create/update multiple meters at once).
- ✓ Work with third-party providers that exchange data directly with Portfolio Manager via web services.

Entering Utility Data Manually

With the help of step-by-step prompts and guidance, entering utility data manually into Portfolio Manager is easy. Follow these steps to add meters and enter bill data for any property in your Portfolio Manager account, including newly-added properties, as well as those that have been in your portfolio for a while.

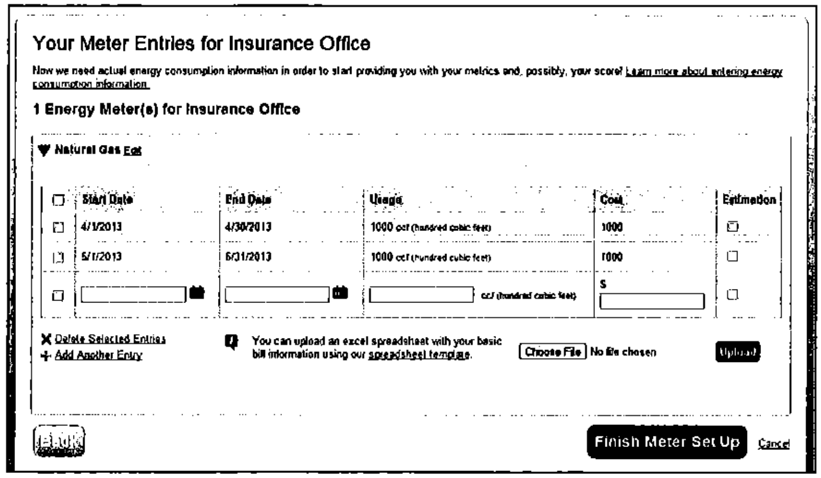
Creating a New Meter (or Meters)



On the main page of your property, click the **Meters** tab.

1. Click **Add Another Meter**. Select the energy and/or water sources that apply to your property. Select additional boxes as needed, indicate how many meters you want to add for each utility type, and then click **Get Started!**
2. Click on any empty cell in the table to edit information on the **About Your Meters** page.
    a. Choose the appropriate units and enter the first bill date associated with each meter.
    b. Leave the **End Date** field empty if a meter is currently in use at the property.
    c. Select the **Enter as Delivery?** checkbox if your energy source is obtained or delivered in bulk quantities, as opposed to being metered (e.g., fuel oil).
    d. Click **Add Another Entry** if you need to add another meter.
    e. Click **Continue.**

3. On the **Your Meter Entries** page, click **Add Another Entry** to enter bill information for each meter.



   a. Enter the start and end date and usage for each entry.
   b. Select the **Estimation** checkbox to identify an entry as a non-measured value (e.g., your utility bill was returned as an estimation of your monthly usage and you expect to update the actual consumption later, when it becomes available).
   c. Select the **Green Power?** checkbox if any of your energy usage was purchased from renewable energy sources. Provide details in the pop-up window, such as quantity, source, and generation location.
   d. Click **Finish Meter Set Up**.
4. After you click **Finish Meter Set Up**, you see the **Meters to Add to Total Consumption** page. You can also access this page from the **Meters** tab by clicking **Meters for Total Consumption**. On this page, you indicate which meters Portfolio Manager should use when calculating energy metrics for your property.
   a. Select which meters you want to include and what the meters measure, and then click **Apply Selections. NOTE:** If the utility meters listed do not cover all energy consumption at the building, indicate the section(s) of the properties that your meters service.

> ***Avoid Double-Counting Energy Data***
>
> To ensure that Portfolio Manager does not double-count any energy use, do not select both sub-meters and the master meter with which they are associated when specifying meters to add to total consumption.

Entering or Modifying Utility Data for Existing Meters

You can also enter utility data for existing meters in Portfolio Manager. There are several ways to access meters to enter data:

- ✓ On the **MyPortfolio** tab, select **Add/Edit Bills** from the **Action** drop-down menu of your property. Choose a meter to edit and then click **Select Meter** to display bill data.
- ✓ On your property's main page, click the **Meters** tab. Use the **Action** drop-down menu next to the meter name to edit basic meter information, view/add bills, or delete the meter. Click the meter name or select **View/Add Bills** from the **Action** drop-down menu to display bill data for that meter.
- ✓ On the **Meters** tab, click **Manage/Enter My Bills.** Choose a meter to edit and click **Select Meter** to display bill data.

> ***Data Errors***
>
> If there is an error in your meter data (e.g., overlaps or gaps greater than1 day in your meter entry dates), Portfolio Manager will alert you of the error and direct you to the affected meter(s) so you can make the necessary edits.

On the **Manage Bills (Meter Entries)** page for your meter, click anywhere in the table to edit entries, select the checkbox next to any entry and click **Delete Selected Entries** at the bottom of the page to delete data, or click **Add Another Entry** to add more information. After you finish making changes or adding data, click **Save Bills**.

Using Spreadsheet Uploads

Spreadsheet templates allow you to quickly and easily upload data into Portfolio Manager using a few simple steps. You can upload data for a single meter, for multiple meters at one property, or for multiple meters across multiple properties.

	A	B	C	D
1	Electric Consumption Data for Electric Meter #1 (kBtu)			
2				
3	[illegible]	[illegible]	[illegible]	[illegible]
4	1/1/2008	1/31/2008	11457	589.45
5	2/1/2008	2/28/2008	10645	450.65
6	3/1/2008	3/31/2008	9945	220.1
7	4/1/2008	4/30/2008	7355	235.67
8	5/1/2008	5/31/2008	6698	209.86
9	6/1/2008	6/30/2008	6235	200.54
10	7/1/2008	7/31/2008	5322	193.24
11	8/1/2008	8/31/2008	6234	200.53
12	9/1/2008	9/30/2008	8655	278.45
13	10/1/2008	10/31/2008	9357	354.24
14	11/1/2008	11/30/2008	10112	395.23
15	12/1/2008	12/31/2008	12466	532.45
16				

Uploading Data for a Single Meter

Follow these steps to upload data for a single meter:

1. Click the **Meters** tab of your property, and then click **Manage/Enter My Bills**.
2. Select a meter from the drop-down menu on the **Manage Bills** page, and then click **Select Meter**.
3. Click **spreadsheet template** at the bottom of the page.
4. Save the spreadsheet file that loads in your browser, and then open it to enter meter information. 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.
5. Click **Choose File** on the **Manage Bills** page (where you originally generated the spreadsheet). Browse for the completed template you saved on your computer, click **Open**, and then click **Upload**. Portfolio Manager then automatically enters the new meter entries for your property.

Uploading Data for Multiple Meters at One or More Properties

Follow these steps to add multiple meters and/or bills for one or more existing properties:

1. Click **upload and/or update multiple properties** at the bottom of the **MyPortfolio** tab.
2. Click **Create an Upload Template** in the **Edit and Manage Information** section to create a custom template.
3. Select the task you are performing ("Add Meters to Existing Properties" or "Add Bills to Existing Meters") and the properties you want to include in the template. Click **Create & Download Template**.
4. Save the spreadsheet file that loads in your browser, and then open it to enter required information, such as dates and energy consumption amounts. 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.
5. Upload the spreadsheet into Portfolio Manager. In the **Upload Spreadsheets** section of the **Upload and/or Update Multiple Properties** page, select the appropriate option from the **Type of Upload** drop-down menu. Browse for the spreadsheet you saved on your computer, click **Open**, and then click **Upload**. Portfolio Manager then automatically adds the data to your portfolio.

Using Web Services

Many utilities and service providers (such as utility bill payment companies and energy consultants) may already be set up to exchange data directly with Portfolio Manager via web services. Here's how to take advantage of this offering (where available):

- ✓ Determine if your utility or service provider is capable of exchanging data with Portfolio Manager by clicking **search for organizations that exchange data** on the **Sharing** tab.
- ✓ If your utility or service provider is listed, then you can connect with them to enable your data to be updated using Portfolio Manager's web services. Once your connection request has been accepted, you will be able to share specific buildings and/or meters with the selected utility or service provider, who can then update your data through an automated process (for more details on the connection and sharing process, see the resource "How to Share Data with other Portfolio Manager Users").
- ✓ When you connect and share with an organization for the purposes of exchanging data via web services, you may be asked specific questions, as determined by the organization, to confirm your identity and the identity of your property. Provide the requested information in order to proceed. Once your sharing request has been accepted, the organization you connected with will be able to update some or all of your property data directly into Portfolio Manager, according to the level of access you provided.

Learn More!

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To get answers to your questions, visit www.energystar.gov/buildingshelp.

How to Share Data with Other Portfolio Manager® Users

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

Sharing your properties and data is fast and easy with Portfolio Manager. There are many reasons why you may want to share access to your property, such as providing information to colleagues or other partners who are helping you to improve the performance of your portfolio. Follow this guide to learn more about sharing features in Portfolio Manager. If you would like to learn more about responding to a Data Request from another user, see the Extra Help section on page 4.

Process for Sharing Data

1. Connect with Others
2. Share Properties
3. Review Shared Properties

1 Connect with Others

In order to share data with others, you must first "connect" with them in Portfolio Manager. To connect with other users from the **My Contacts** page:

1. Click **Contacts** in the upper right-hand corner. The directory shows your current list of contacts, including those with whom you are currently "connected."
2. Click **Add Contact**.
3. Find a Portfolio Manager user by by searching for their name, Portfolio Manager username, or email address, and then click **Search**. **NOTE:** You can only "connect" with users who are searchable in Portfolio Manager. On the **Account Settings** page, you can change your **Searchability in Portfolio Manager** setting.
4. Click **Connect** next to the name of an individual or organization on the **Search Results** page to send a connection request. **NOTE:** If you are connecting with another user or organization to begin exchanging data via web services, you will be prompted to read and acknowledge the organization's Terms of Use.

When a connection request is sent, the person with whom you are looking to connect will see a notification on their **MyPortfolio** tab. They can accept the request directly from the notification. Once they accept your request, you will receive a confirmation. You are now connected and can share properties with your contact!

2 Share Properties

Share one or more of your properties with your connected contacts and specify the level of access the contacts have to view and/or edit your properties. There are several ways to access the **Share Your Property(ies)** page.

- ✓ Click the **MyPortfolio** tab and select **Share with Others** from the drop-down menu next to the property you want to share.
- ✓ Click the **Sharing** tab and then click **Share a Property**.
- ✓ Click **Share** from the **My Contacts** page.

Permissions

Read Only Access allows others to view your property data.

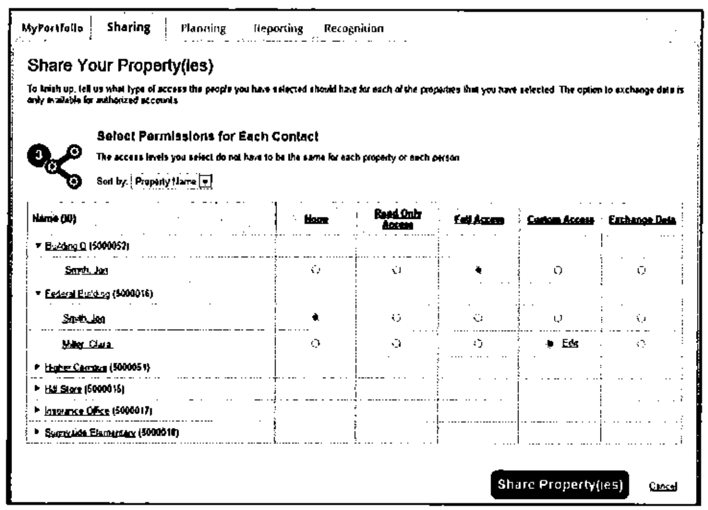
Full Access allows others to view and edit your property data.

Custom Access allows you to designate read-only or full access levels for distinct property data (e.g., property information, meter information, goals).

Exchange Data allows you to share your property with an organization that exchanges data with Portfolio Manager through web services.

On the **Share Your Property(ies)** page, follow these steps:

1. Select the properties you want to share from the drop-down menu. You can select a single property, multiple properties, or all properties in your account. If you want to choose multiple properties, you can filter your portfolio by primary function or by state/province to easily find and select the properties you want to share.
2. Select contacts with whom to share your properties by clicking on their names. You can select multiple contacts or accounts by pressing the **Ctrl** key as you make each selection. If you do not see a specific contact in your list, check to see if they are listed on your **Contacts** page and have accepted your connection request.



3. Click **Continue**.
4. Select permissions for each property and contact.
   a. Click the gray arrow next to the property name.
   b. Select the level of access for the contact and property. You can choose None, Read Only Access, Full Access, Custom Access, or Exchange Data. If you choose Custom Access, you can provide separate levels of access for each meter, and also grant access to the goal setting and recognition features. **NOTE:** Properties you share are available in the contact's reports.
5. Click **Share Property(ies)** to send a sharing request to those with whom you are sharing. After they accept the request, the properties will appear in their portfolio.

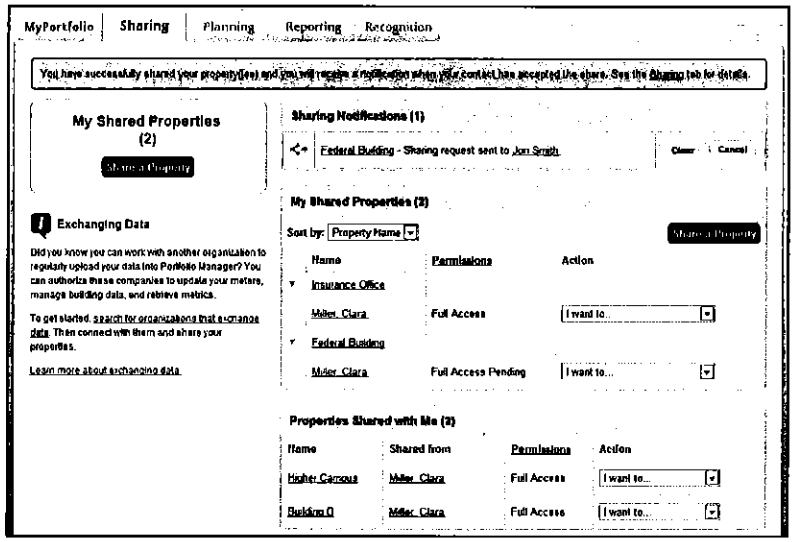
After you share your property, you will see notifications on your **MyPortfolio** and **Sharing** tabs that the sharing request was sent, as well as notifications that the contact has accepted your sharing request.

Data Exchange with Web Services Providers

A number of third party organizations (e.g., utilities, energy service providers) use web services to exchange data with their customers' Portfolio Manager accounts. Click **Search for organizations that exchange data** on the left-hand side of the **Sharing** tab to see if your utility or service provider can help manage your account via web services.

To initiate web services, send a connection request to your utility or service provider. After the provider accepts the request, follow the steps in this document to share properties with the provider. Select **Exchange Data** as the access level, and follow prompts to choose specific properties and/or meters that will be managed via web services. **NOTE**: You may be required by your provider to enter further identifiers for your organization, properties, and/or meters.

Review Shared Properties



Review properties you have shared with others and properties that have been shared with you.

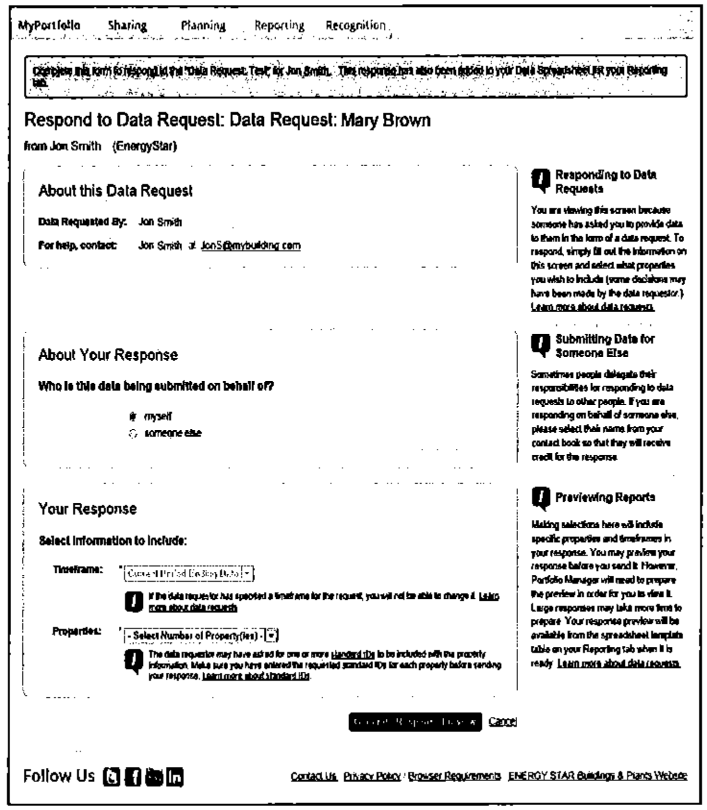
On the **Sharing** tab:

- ✓ View sharing requests in the **Sharing Notifications** section. This includes sharing requests you have sent to others, and requests others have sent to you.
- ✓ View all properties you have shared in the **My Shared Properties** section.
    - o Click the blue arrow next to the property name to see the name of the contact with whom the property is shared and the sharing permissions.
    - o Select an option from the **Action** drop-down menu to view or edit sharing settings, or to stop sharing the property. **NOTE:** When you edit permissions for an existing share, the contact with whom you are sharing will be required to re-accept the share request at the new access level.
    - o Sort your shared properties by Property Name or by Contact Name. **NOTE:** Sorting by Contact Name may be useful if you are sharing properties with many people.
- ✓ View all properties that have been shared with you in the **Properties Shared with Me** section.

Learn More!

To learn more about Portfolio Manager, visit www.energystar.gov/benchmark.
To get answers to your questions, visit www.energystar.gov/buildingshelp.

Extra Help: How to Respond to Data Requests

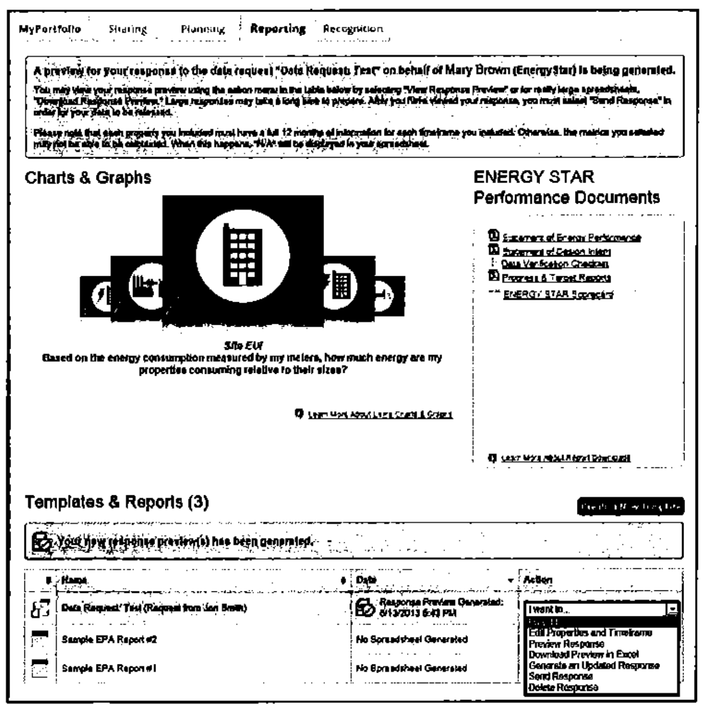


You may receive Data Requests from other users or organizations to provide property or portfolio data as part of a program or initiative. Each request includes a link that takes you to Portfolio Manager and provides instructions for completing the Data Request.

This process is often used in jurisdictions where there are voluntary benchmarking programs or mandatory energy use disclosure policies.

Responding to a Data Request is different than sharing a property with a contact, because when you respond to a Data Request, you release only the information specified in the data request template for the designated time period.

Follow these steps to respond to a Data Request you may receive:



1. Click the link provided by the requester (this link may be provided via email or posted on a public website).
2. Sign in to Portfolio Manager. You will be taken to the **Respond to Data Request** page. Provide the requested information and select from the drop-down menu which properties to include in the response. Click **Generate Response Preview**.
3. Click on the **Reporting** tab. You will see a notification in the **Templates & Reports** section when your preview is available. Select **Preview Response** from the drop-down list next to the report name.
4. After you have reviewed and confirmed the data in the report, select **Send Response** from the drop-down list next to the report name to complete the process. You will receive a confirmation email with a receipt and a copy of the data submitted. **NOTE:** If found an error, edited or updated data, or want to send a revised response, select **Generate an Updated Response** from the **Action** drop-down menu.

Standard Report Templates

EPA's Portfolio Manager offers you eight standard reports with key metrics and information you can use to easily assess your portfolio's performance and progress, and thereby make informed business decisions. This document lists the metrics included in each of the eight reports so you can see what each report offers.

Standard Reports

- ✓ Performance Highlights
- ✓ Energy Performance
- ✓ Emissions Performance
- ✓ Water Performance
- ✓ Fuel Performance
- ✓ ENERGY STAR Certification Status
- ✓ Partner of the Year Report
- ✓ Sustainable Buildings Checklist Report

Metrics Included in Every Report

- ✓ Property ID
- ✓ Property Name
- ✓ Parent Property Name
- ✓ City
- ✓ State/Province
- ✓ Postal Code
- ✓ Year Ending Date
- ✓ Property Floor Area

Performance Highlights
Energy Cost
Site EUI
Source EUI
Percent Better than National Median Source EUI
National Median Source EUI
Total GHG Emissions
Total Water Use
Total Water Cost (All Water Sources)
ENERGY STAR Score

Energy Performance
Energy Cost
Site EUI
Source EUI
Percent Better than National Median Source EUI
National Median Source EUI
National Median Site EUI
Site EUI – Adjusted to Current Year
Source EUI – Adjusted to Current Year
Weather Normalized Site EUI
Weather Normalized Source EUI

Emissions Performance
Indirect GHG Emissions
Direct GHG Emissions
Total GHG Emissions
Avoided GHG Emissions
Net GHG Emissions
Electric Distribution Utility
eGRID Region
eGRID Output Emissions Rate

Timeframe & Properties

You can select timeframes and properties to include in standard reports. You can also generate multiple reports with different dates or groups of properties in order to view changes in your portfolio in detail.

Water Performance
Total Water Use (All Water Sources)
Total Water Cost (All Water Sources)
Indoor Water Use (All Water Sources)
Indoor Water Cost (All Water Sources)
Indoor Water Intensity (All Water Sources)
Indoor Water Cost Intensity (All Water Sources)
Outdoor Water Use (All Water Sources)
Outdoor Water Cost (All Water Sources)

Fuel Performance
Site Energy Use
Energy Cost
Electricity Use – Grid Purchase
Electricity (Grid Purchase) Cost
Natural Gas Use
Natural Gas Cost
District Steam Use
District Steam Cost
Fuel Oil #2 Use
Fuel Oil #2 Cost
Propane Use
Propane Cost

ENERGY STAR Certification Status
ENERGY STAR Score
ENERGY STAR Certification – Year(s) Certified
ENERGY STAR Certification – Application Status
ENERGY STAR Certification – Last Approval Date
ENERGY STAR Certification – Next Eligible Date
ENERGY STAR Certification – Eligibility
Energy Alerts
Property Use Alerts
Date Property Last Modified
Property's Portfolio Manager Account Holder
Property's Portfolio Manager Account Holder Email

Partner of the Year Report
Property Type (EPA Calculated)
Score
Site Energy
Source Energy
Site EUI
Source EUI
Total GHG Emissions
Weather Normalized Site Energy
Weather Normalized Source Energy
Weather Normalized Site EUI
Weather Normalized Source EUI
ENERGY STAR Certification (Year(s) Certified)

Sustainable Buildings Checklist Report	
ID	**Guiding Principle I. Integrated**
Portfolio Manager Parent Property ID	Team
U.S. Agency Designated Covered Facility ID	Goals
U.S. Federal Real Property Unique Identifier	Plan
Third Party Certification	Occupant Feedback
Third Party Certification Target Date of Compliance	Commissioning
Third Party Certification Actual Date of Compliance	**Guiding Principle II. Energy**
Portfolio Manager Information	Energy Efficiency (Any Option)
Primary Property Type – EPA Calculated	Energy Efficiency – ENERGY STAR Score
ENERGY STAR Score	Energy Efficiency – Measured 20%
ENERGY STAR Certification – Last Approval Date	Energy Efficiency – Code 20%
Energy Use Metrics	Efficient Products
Site EUI	Measurement & Verification
Source EUI	On-Site Renewable
Weather Normalized Site EUI	Benchmarking
Weather Normalized Source EUI	**Guiding Principle III. Water**
Site EUI – Adjusted to Current Year	Indoor Water (Any Option)
Source EUI – Adjusted to Current Year	Indoor Water – Code 20%
Onsite Renewable System Generation	Indoor Water – Measured 20%
Onsite Renewable System Electricity Exported	Outdoor Water (Any Option)
Electricity – Onsite Renewable System Electricity Used Onsite/Coincident	Outdoor Water – Measured 50%
Electricity Sourced from Online Renewable Systems (% of Total Electricity, including Grid Purchase and Onsite)	Outdoor Water – Conventional 50%
Total GHG Emissions	Outdoor Water – No Outdoor Water
Water Use Metrics	Stormwater
Indoor Water Use (All Water Sources)	Efficient Products
Indoor Water Intensity (All Water Sources)	**Guiding Principle IV. Indoor Environment**
Outdoor Water Use (All Water Sources)	Ventilation & Thermal Comfort
Cost Metrics	Moisture Control
Energy Cost	Automated Lighting Controls
Energy Cost Intensity	Daylighting & Occupant Controls
Total Water Cost (All Water Types)	Daylighting
Guiding Principles – Overview	Occupant Controls
Actual Date of Compliance	Low-Emitting Materials
Target Date of Compliance	Integrated Pest Management
Compliance Path	Tobacco Smoke Control
Checklist Manager	**Guiding Principle V. Materials**
% Complete (Yes or NA)	Recycled Content
% Yes	Biobased Content
% Not Applicable	Environmentally Preferred Products
% In Process	Waste & Materials Management
% No	Ozone Depleting Compounds
% Not Assessed	