



Alamo Area Council
of Governments



North Central Texas
Council of Governments



ENERGY STAR Portfolio Manager Webinar



Agenda

Welcome / Introduction – Joaquin Escalante, NCTCOG; Terra Moreno, WCTCOG;
Lyle Hufstetler, AACOG

Purpose of the Webinar and Zero Emissions Building Definition – Joaquin Escalante, NCTCOG

Overview of Portfolio Manager and Demonstration – Charlotte Aitken, EPA

Case Studies

City of Dallas – Srinivas Vemuri

City of San Antonio – Andra Nava-Garcia

Additional Resources – Joaquin Escalante, NCTCOG

ENERGY STAR and DOE's National Definition of a Zero Emissions Building

Department of Energy's – National Definition of a Zero Emissions Building

- Part one of criteria released
- At a minimum, a building that achieves zero operational emissions from energy use must be:
 - Energy efficient
 - Free of on-site emissions from energy use
 - Powered solely from clean energy

Supports DOE's Decarbonizing the U.S. Economy by 2050: National Blueprint for the Buildings Sector

- Strategy for reducing building emissions while delivering equity, affordability, and resilience to communities
- 65% by 2035
- 90% by 2050

ENERGY STAR and DOE's National Definition of a Zero Emissions Building

[The National Definition of a Zero Emissions Building Part 1: Operational Emissions from Energy Use document](#) provides implementation guidance for existing and new buildings achieve energy efficiency

Below are criteria examples from each building type

- Existing buildings example
 - The building obtains an ENERGY STAR score of 75 or higher
- New buildings example
 - Certified to the most recent effective version of the ENERGY STAR Residential New Construction program or Zero Energy Ready Homes program.



ENERGY STAR® Portfolio Manager® 101

Navigating Portfolio Manager, Adding a New Property and Entering Use Details, and Analyzing Progress

June 20, 2024



Learning Objectives

In this session, you will become familiar with EPA's ENERGY STAR® Portfolio Manager® tool and learn how to:

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Analyze progress using performance documents, charts and graphs and reports

Note: ENERGY STAR also has short 5-minute videos on these introductory topics available for quick view at www.energystar.gov/buildings/training



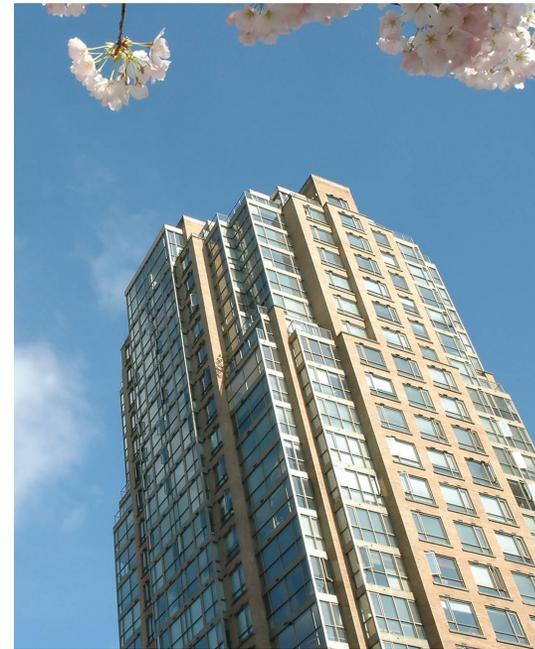
The biggest little label in energy efficiency



7 billion
products



2.7 million
new homes



43,000
buildings



270 industrial
plants



- 300,000+ buildings last year
- Nearly 25% of all floorspace
- 1,000 properties added every day
- 3 languages – French, Spanish

- 380 third-party tools
- Dozens of state/local benchmarking policies
- One foreign government (Canada)



Management Tool



Assess whole building energy and water consumption, plus waste



Track green power purchase



Share/report data with others



Track changes in energy, water, greenhouse gas emissions, and cost over time



Create custom reports



Apply for ENERGY STAR certification





ENERGY STAR® PortfolioManager®

Hundreds of metrics, including:



Energy use Source,
site, weather
normalized, demand



Water use
Water use intensity,
Water Score
(for Multifamily)



Waste & Materials
Waste intensity,
diversion rate



**1-100
ENERGY STAR
score**



**GHG
emissions**
Indirect,
direct, total,
avoided

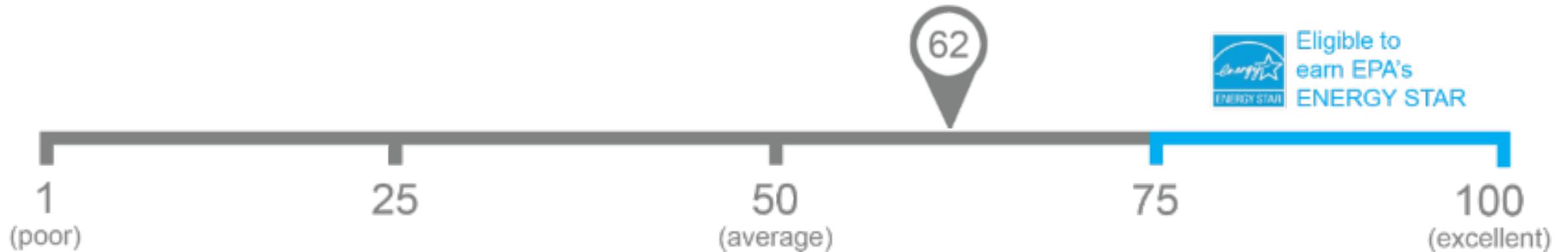


Benchmarking is the process of comparing use to gain valuable perspective about building performance

Use Portfolio Manager to:	Energy	Water	Waste & Materials
Establish a baseline:	✓	✓	✓
• Compare current use to baseline over time.	✓	✓	✓
• Compare median of national sample of similar buildings to baseline.	✓		
• Compare normalized national sample of similar buildings to baseline.	✓ (ENERGY STAR 1-100 Score)	✓ (Multifamily 1-100 Score)	
Set target reduction goal.	✓		
Compare properties in portfolio to each other.	✓	✓	✓
Apply for recognition (eligible space types).	✓ (ENERGY STAR Certification)		



The 1-100 ENERGY STAR Score



One simple number
understood by ALL stakeholders.



Property types with 1-100 ENERGY STAR scores



Bank Branch



Barracks*



Convenience Stores



Courthouses



Data Centers



Distribution Centers



Financial Offices



Hospitals



Hotels



K-12 Schools



Medical Offices



Multifamily Housing



Office Buildings



Residence Hall/Dormitory*



Retail Stores



Senior Living Communities



Single-Family Homes*



Supermarkets



Vehicle Dealerships



Warehouses



Wastewater Treatment Plants*



Wholesale club/Supercenters



Worship Facilities



To get started in Portfolio Manager you will need:

- 1 Property information:
 - Primary function
 - Name, address, postal code
 - Year built
 - Gross floor area
- 2 Property use details, e.g.:
 - Operating hours
 - No. of computers
 - No. of workers, etc.
- 3 At least 12 mos. of consumption data for resources you want to track:
 - Property-specific utility bills for all purchased and on-site generated energy and water
 - Quantity of waste and materials recycled, disposed, donated etc.

Use Portfolio Manager's [data collection worksheet](#) to gather data upfront for your property type/s

<https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet>





How To

- [Navigate Portfolio Manager](#)
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Generate reports to assess progress

Commercial Buildings

Benchmark

- Get Started
- Understand Metrics
- Document Performance
- Analyze Results
- COVID-19 Updates
- Portfolio Manager Login

Save Energy

Earn Recognition

Resources by Audience

Resources by Topic

Training

About Us

JOIN MAILING LIST



Sign up to receive updates from ENERGY STAR BUILDINGS & PLANTS on Portfolio Manager and program news.

SIGN UP

Benchmark Your Building Using ENERGY STAR® Portfolio Manager®



The most-used energy measurement and tracking tool for commercial buildings.

What is Benchmarking?

The first step to saving energy at your building is to benchmark – that is, to measure and compare your building's energy to similar buildings, past consumption, or a reference performance level.

Benchmarking turns the information on your utility bill into knowledge you can act on.

ENERGY STAR Portfolio Manager – the Industry Standard for Benchmarking Commercial Buildings

Portfolio Manager is an interactive resource management tool that enables you to benchmark the energy use of any type of building, all in a secure online environment.

Nearly 25% of U.S. commercial building space is already actively benchmarking in Portfolio Manager, making it the industry-leading benchmarking tool. It also serves as the national benchmarking tool in Canada.



Use Portfolio Manager metrics to compare your building's energy use to a yearly baseline, national medians, or similar buildings in your portfolio.

Many buildings can also receive a 1-100 ENERGY STAR SCORE

COVID-19 Program Impacts:

EPA has made several changes to the certification rules. See this FAQ for the latest updates.

GET HELP

Looking for Portfolio Manager technical support? Visit our help center.



Username

Password

[Create account](#)

[Forgot password?](#)

Log In

MANAGE ENERGY, WATER, WASTE, AND GHGS

Energystar.gov/portfoliomanager

Create a username and password, then log in





Navigate Portfolio Manager

4 portfolio level tabs



7 property level tabs



Intuitive navigation – multiple ways to get to the same place

Navigate Portfolio Manager

Portfolio level view



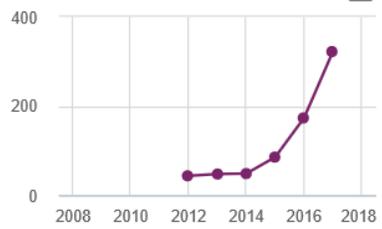
**ENERGY STAR®**
PortfolioManager®

Welcome ninaberlin: [Account Settings](#) | [Notifications](#) | [ENERGY STAR Notifications](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio | Sharing | Reporting | Recognition

Properties (14)
[Add a Property](#)

ENERGY STAR Score Trend
[Change Metric](#)



(Chart current as of 05/08/2019 04:27 PM EDT) [Refresh Chart](#)

Manage Portfolio

[Transfer ownership](#) of a property that you manage to another Portfolio Manager user.

Portfolio Manager Metric Updates

On August 27, 2018 performance metrics in Portfolio Manager were updated for U.S. buildings to reflect current market data. You may notice a change in your current and historic 1-100 ENERGY STAR score or other metrics. After logging in for the first time after these updates have been made, you'll need to click the "Refresh Metrics" button to see your new metrics within the Dashboard. For more information, visit www.energystar.gov/scoreupdates.

[Clear Message](#)

Dashboard (Metrics current as of 03/11/2019 12:05 PM EDT) [Refresh Metrics](#)

[View All Properties \(14\)](#) | [Energy Highlights](#) | [Refresh Metrics](#)

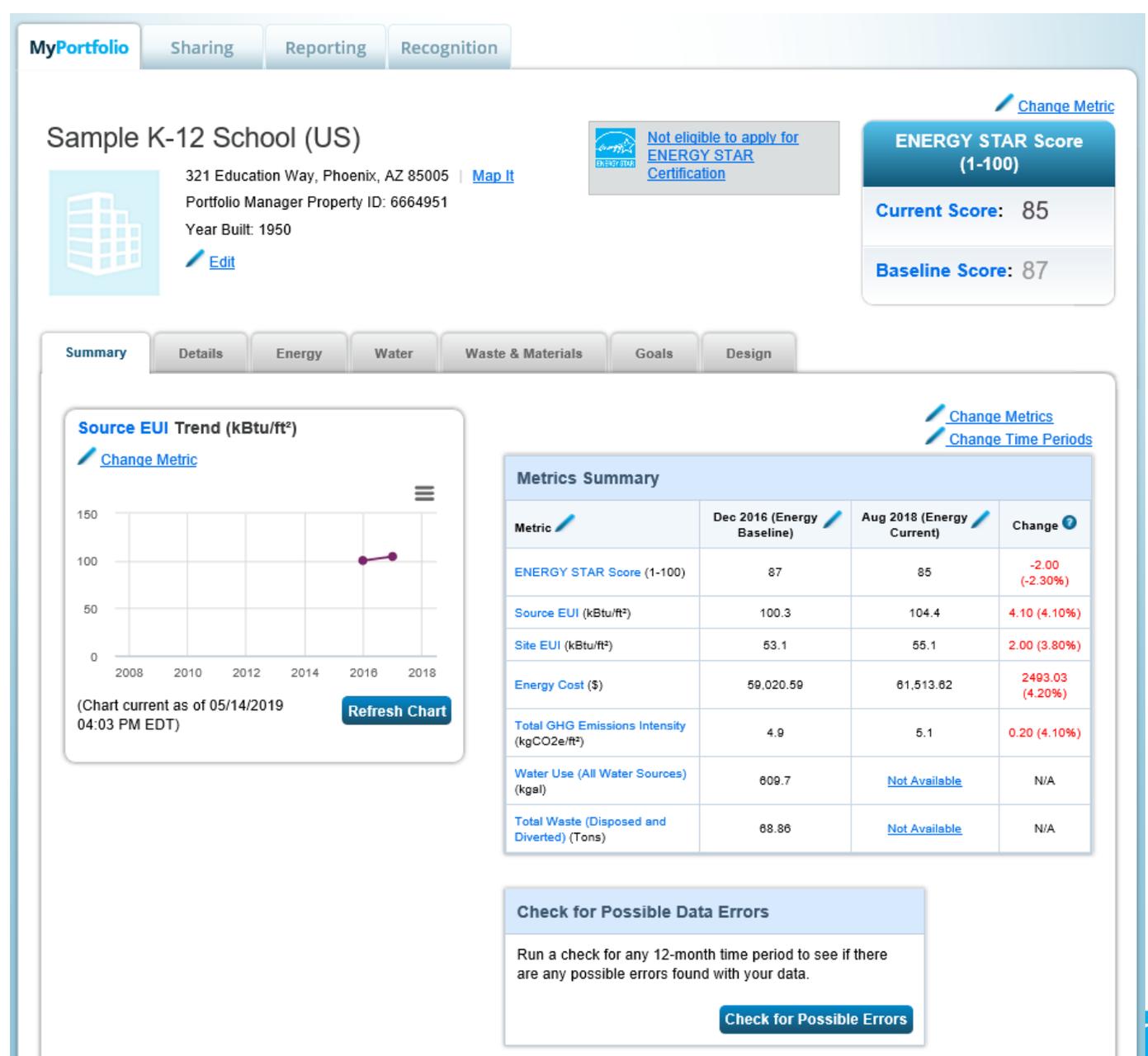
[Add/Edit/Delete Groups](#) | [Add/Edit/Delete Views](#)

Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft²)	Source EUI (kBtu/ft²)
Antonio Office Building 6652215	NA	NA	NA	NA
Company HQ 6466285	04/30/2018	63	62.5	150.2
Corporate Office 6650503	10/31/2018	64	55.8	154.0
Hotel & Suites 6652206	08/31/2018	25	79.4	222.4
Little Falls Elementary School 6466039	04/30/2018	61	62.0	109.7



Navigate Portfolio Manager

Property level view 



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

Sample K-12 School (US)

321 Education Way, Phoenix, AZ 85005 | [Map It](#)
Portfolio Manager Property ID: 6664951
Year Built: 1950
[Edit](#)

[Change Metric](#)

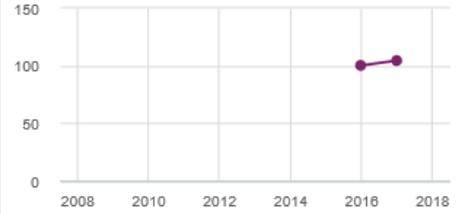
ENERGY STAR Score (1-100)
Current Score: 85
Baseline Score: 87

[Change Metrics](#)
[Change Time Periods](#)

Summary | [Details](#) | [Energy](#) | [Water](#) | [Waste & Materials](#) | [Goals](#) | [Design](#)

Source EUI Trend (kBtu/ft²)

[Change Metric](#)



(Chart current as of 05/14/2019 04:03 PM EDT) [Refresh Chart](#)

Metrics Summary

Metric	Dec 2016 (Energy Baseline)	Aug 2018 (Energy Current)	Change
ENERGY STAR Score (1-100)	87	85	-2.00 (-2.30%)
Source EUI (kBtu/ft ²)	100.3	104.4	4.10 (4.10%)
Site EUI (kBtu/ft ²)	53.1	55.1	2.00 (3.80%)
Energy Cost (\$)	59,020.59	61,513.82	2493.03 (4.20%)
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	4.9	5.1	0.20 (4.10%)
Water Use (All Water Sources) (kgal)	609.7	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	68.86	Not Available	N/A

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](#)



How To

- Navigate Portfolio Manager
- [Add a property and enter its use details](#)
- Enter energy, water, and waste & materials data
- Generate reports to assess progress

Add a Property



The screenshot displays the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo, followed by the text "ENERGY STAR®" and "PortfolioManager®". Below this is a navigation bar with four tabs: "MyPortfolio", "Sharing", "Reporting", and "Recognition". The "MyPortfolio" tab is active. In the main content area, there is a white rounded rectangle containing the text "Properties (14)" and a blue button labeled "Add a Property". This button is circled in red. To the right of this rectangle is a blue sidebar with a pushpin icon and text that reads "Portfolio M" and "On August reflect curr STAR scor".



Add a Property: Existing

Select property type

Select number
of buildings

Select construction
status

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!



Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

[Learn more about Property Types.](#)



Your Property's Buildings

How many physical buildings do you consider part of your property?

- None:** My property is part of a building (e.g., a Tenant Space)
- One:** My property is a single building
- More than One:** My property includes multiple buildings ([Campus Guidance](#))

How many?



Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

- Existing:** My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
- Design Project:** My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
- Test Property:** This is not a real property. I am entering it to test features, or for other purposes such as training.

Get Started!

[Cancel](#)



Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).



Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.



Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

Entering Basic Property Information

Set Up a Property: Basic Property Information

Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name: *

Country: *

Street Address: *

City/Municipality: *

State/Province: *

Postal Code: *

[Year Built](#): *

Gross Floor Area: * [Temporary Value](#)

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

[Irrigated Area](#):

Occupancy: * %



Entering Basic Property Information

Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

Standard ID - City/Town:
 ID:

Standard ID - County/District:
 ID:

Standard ID - State/Province:
 ID:

Standard ID - Other:
 ID:

[+ Add Another](#)



Check the statements that apply

Do any of these apply?

- My property's energy consumption includes [parking](#) areas
- My property has a [Data Center](#) that requires a constant power load of 75 kW or more
- My property has one or more retail stores
- My property has one or more restaurants/cafeterias

Back

Continue

[Cancel](#)

Answering these simple questions will help us guide you in entering your property correctly.



These use details will change depending on the property type you specify.

Enter Values for Property Use Details

Add Another Type of Use

▼ Building Use / [Edit Name](#)

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the onsite preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 100,000 <input type="text"/> Sq. Ft. <input type="text"/>	1/1/1990 <input type="text"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
Number of Cash Registers	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
★ Number of Open or Closed Refrigeration/Freezer Units	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
Length of All Open or Closed Refrigeration/Freezer Units	<input type="text"/> Ft. <input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
★ Number of Walk-in Refrigeration/Freezer Units	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
Area of All Walk-in Refrigeration/Freezer Units	<input type="text"/> Sq. Ft. <input type="text"/>	1/1/1992 <input type="text"/>	<input type="checkbox"/>
Cooking Facilities	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1990 <input type="text"/>	<input type="checkbox"/>

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

▼ Building Use / [Edit Name](#)

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the onsite preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* 12,000 <input type="text"/> Sq. Ft. <input type="text"/>	1/1/1992 <input type="text"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="text"/>	<input type="checkbox"/>

Property Summary Tab

MyPortfolio
Sharing
Reporting
Recognition

Supermarket A-1



1214 Main Street, Arlington, VA 22201 | [Map It](#)

Portfolio Manager Property ID: 6836065

Year Built: 1992

[Edit](#)

 Not eligible to apply for ENERGY STAR Certification

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?

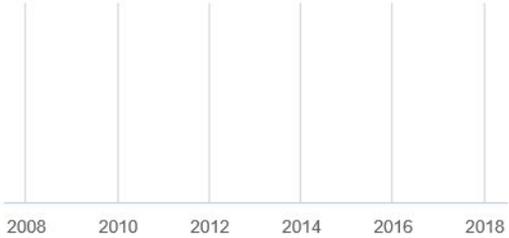
Current: N/A

Baseline: N/A

Summary
Details
Energy
Water
Waste & Materials
Goals
Design

[Refresh](#) to see **Source EUI Trend**

[Change Metric](#)



[Change Metrics](#)
[Change Time Periods](#)

Metrics Summary			
Metric 	Not Available (Energy Baseline) 	Not Available (Energy Current) 	Change 
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A



How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Generate reports to assess progress

Meters Tabs

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

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | [Map It](#)
Portfolio Manager Property ID: 6836065
Year Built: 1992
[Edit](#)

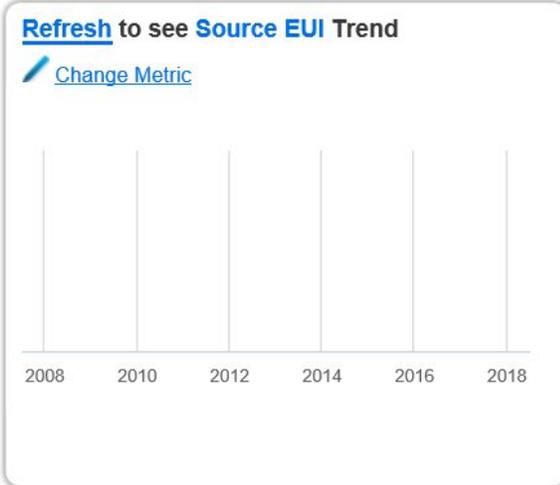
[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?
Current: [N/A](#)
Baseline: [N/A](#)

[Not eligible to apply for ENERGY STAR Certification](#)

[Summary](#) | [Details](#) | **[Energy](#)** | [Water](#) | [Waste & Materials](#) | [Goals](#) | [Design](#)

[Refresh](#) to see **Source EUI Trend**
[Change Metric](#)



Metrics Summary [Change Metrics](#) [Change Time Periods](#)

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Energy Tab

MyPortfolio | Sharing | Reporting | Recognition

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | [Map It](#)
Portfolio Manager Property ID: 6836065
Year Built: 1992
[Edit](#)

[Change Metric](#)

Not eligible to apply for ENERGY STAR Certification

Weather Normalized Source EUI (kBtu/ft²) Why not score?

Current: [N/A](#)

Baseline: [N/A](#)

Summary | Details | **Energy** | Water | Waste & Materials | Goals | Design

Meter Summary

0 Energy Meters Total
In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.

[Add A Meter](#)

Current Energy Date
Not Available

[Enter Your Bills](#)

Meters - Used to Compute Metrics (0)

[View as a Diagram](#)

[Add A Meter](#)

! There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. [Enter information about your energy meters](#) to begin tracking energy usage. After entering the meter, you will need to [choose to include it in your metrics](#).

For a step-by-step guide to entering meter data, see [How to get Utility Data into Portfolio Manager](#).

Four Ways to Enter Bill Data

1. Manually



Entering Additional Information

Get Started Setting Up Meters for Supermarket A-1

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.



Sources of Your Property's Energy

What kind of **energy** do you want to track? Please select all that apply.

- Electric
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Coal (anthracite)
- Coal (bituminous)
- Coke
- Wood
- Kerosene
- Fuel Oil (No. 1)
- Other:

Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More.](#)

Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. [Learn more.](#)

Get Started!

[Cancel](#)

About Your Meters

About Your Meters for Supermarket A-1

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

2 Energy Meters for Supermarket A-1 (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	C
<input type="checkbox"/>	Natural Gas	Natural Gas				<input checked="" type="checkbox"/>		<input type="checkbox"/>	1
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		<input type="checkbox"/>	

- ccf (hundred cubic feet)
- cf (cubic feet)
- Cubic meters
- GJ
- kBtu (thousand Btu)
- kcf (thousand cubic feet)
- MBtu/MMBtu (million Btu)
- MCF (million cubic feet)
- therms

[Delete Selected Entries](#)

[Add Another Entry](#)

Back

Create Meters

[Cancel](#)

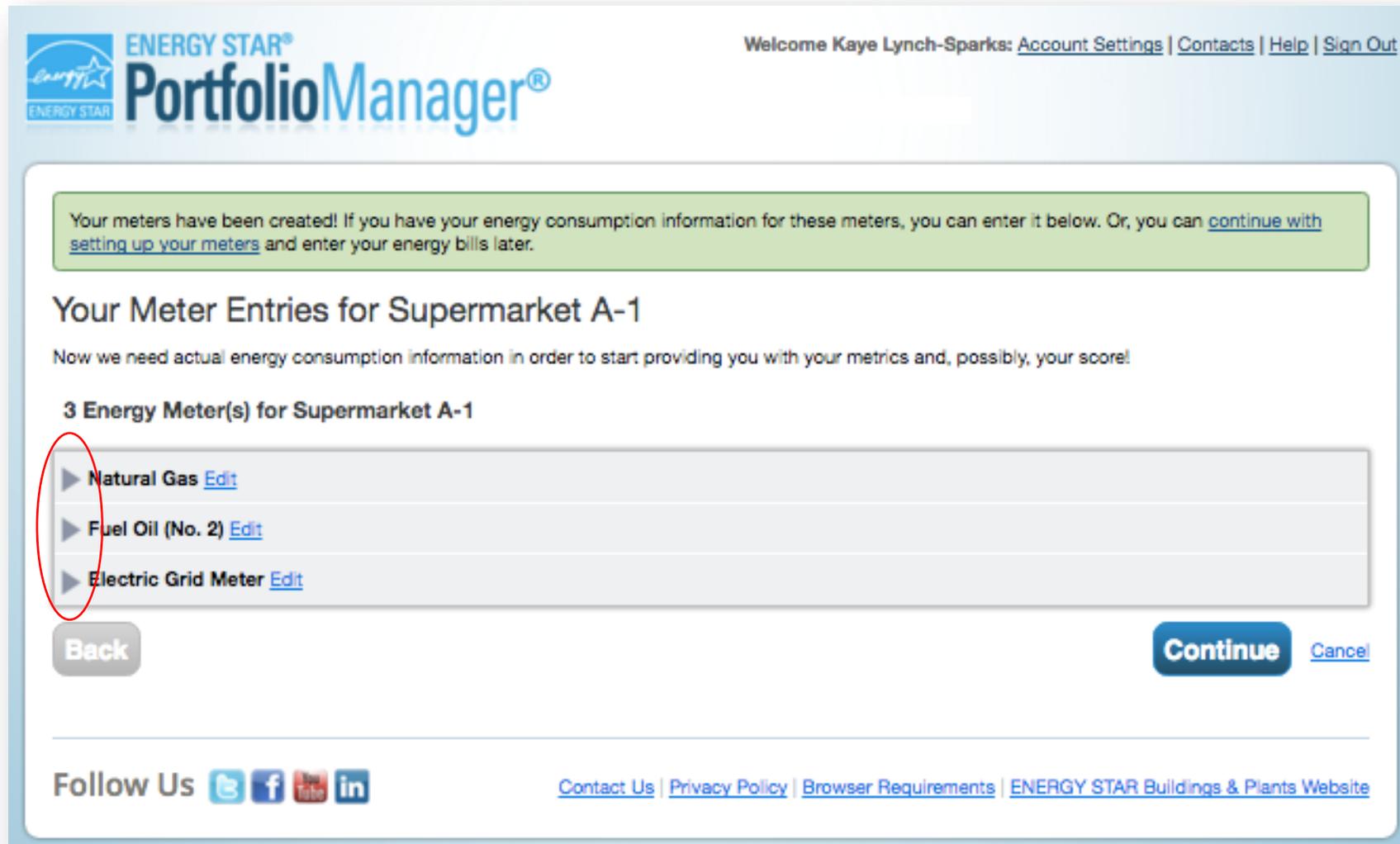
Follow Us    

[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)



Add Energy Consumption Information

Expand meter by clicking arrow



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 Kaye Lynch-Sparks: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)". A green message box states: "Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later." Below this is the heading "Your Meter Entries for Supermarket A-1" and the text "Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!". Underneath, it says "3 Energy Meter(s) for Supermarket A-1". A list of three meters is shown: "Natural Gas [Edit](#)", "Fuel Oil (No. 2) [Edit](#)", and "Electric Grid Meter [Edit](#)". Each meter entry has a right-pointing arrow icon. A red circle highlights the arrow for "Natural Gas". At the bottom left is a "Back" button, and at the bottom right are "Continue" and "Cancel" buttons. The footer includes "Follow Us" with social media icons for Twitter, Facebook, YouTube, and LinkedIn, and a row of links: "Contact Us", "Privacy Policy", "Browser Requirements", and "ENERGY STAR Buildings & Plants Website".



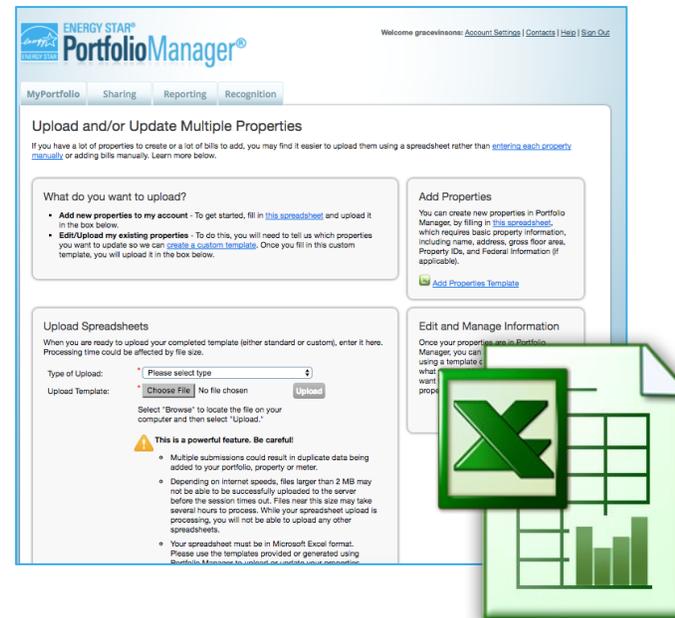
Get Data Into Portfolio Manager

Choose the best data management method.

Manual entry



Spreadsheet upload



ENERGY STAR PortfolioManager®

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

MyPortfolio | Sharing | Reporting | Recognition

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [enter each property manually](#) or adding bills manually. Learn more below.

What do you want to upload?

- **Add new properties to my account** - To get started, fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in this custom template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property ID, and Federal information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template: No file chosen

Select "Browse" to locate the file on your computer and then select "Upload."

⚠ This is a powerful feature. Be careful!

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet is being processed, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

Edit and Manage Information

Once your properties are in Portfolio Manager, you can use a template to what want prop

Web services



Add Meter Entries and Fill in Data

Add another entry

Basic Meter Information

Monthly Entries

Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value=""/>	<input type="text" value=""/>

[Delete Selected Entries](#)
[Add Another Entry](#)
[Learn how to copy/paste](#)

Upload data in bulk for this meter:

You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#)

No file chosen

[Cancel](#)

How To Guide:
Electric Demand Tracking
<https://www.energystar.gov/buildings/tools-and-resources/how-track-electric-demand-portfolio-manager>.

Use a spreadsheet to upload or copy and paste



Meters to Add to Total Consumption

MyPortfolio | Sharing | Reporting | Recognition

Your meter entries have been added to your meters!

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for [Supermarket A-1](#) so that we can provide you with the most accurate metrics possible.

Summary

3

Please tell us what your meters represent.

Energy Meters

Select all meters to be included in your Energy metrics. (Hint: All meters should be included unless they are [sub-meters](#).)

<input type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	Fuel Oil (No. 2) 30521002	Fuel Oil (No. 2)
<input checked="" type="checkbox"/>	Natural Gas 30521001	Natural Gas
<input checked="" type="checkbox"/>	Electric Grid Meter 30521003	Electric - Grid

Total of 3 meter(s). Tell us what this represents:

- These meter(s) account for the total energy consumption for [Supermarket A-1](#) (a single building).
- These meter(s) do not account for the total energy consumption for [Supermarket A-1](#) (a single building).

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

.....

Apply Selections [Cancel](#)



Energy Meters Tab: Meters Added and Displayed

Notification

Add or
update bills

MyPortfolio | Sharing | Reporting | Recognition

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

Supermarket A-1
1214 Main Street, Arlington, VA 22201 | [Map It](#)
Portfolio Manager Property ID: 6836065
Year Built: 1992
[Edit](#)

[Change Metric](#)

Not eligible to apply for ENERGY STAR Certification

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

Summary | Details | **Energy** | Water | Waste & Materials | Goals | Design

Meter Summary
5 Energy Meters Total
3 - Used to Compute Metrics
2 - Not Used in Metrics
[Add A Meter](#)
Current Energy Date Not Available
[Enter Your Bills](#)

Meters - Used to Compute Metrics (3) [Add A Meter](#)
[Change Meter Selections](#)
[View as a Diagram](#)

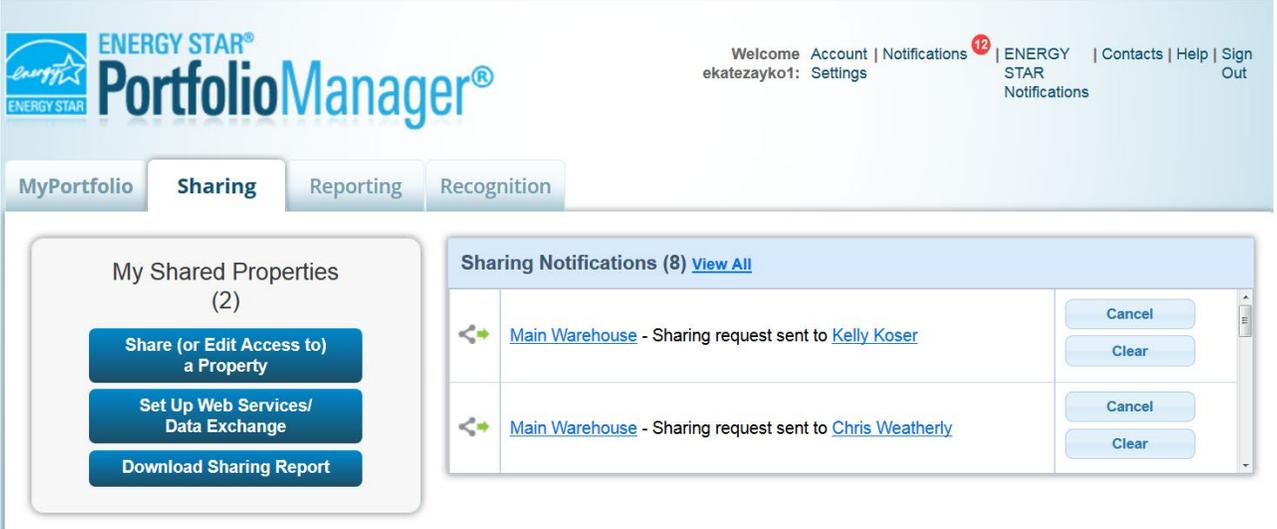
Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter 56291144	Electric - Grid		Yes
Fuel Oil (No. 2) 56291143	Fuel Oil (No. 2)		Yes
Natural Gas 56291142	Natural Gas		Yes

[Download Annual Totals by Meter](#)

Four Ways to Enter Bill Data

Get Data In: ENERGY STAR Web Services

- Some energy service companies and utilities exchange data with Portfolio Manager to:
 - Manage building and utility data for customers
 - Access the ENERGY STAR score and other performance metrics
- To use web services, “**connect**” and “**share**” your properties with your web service provider from the Sharing tab



The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top, the logo and navigation links are visible: "Welcome Account | Notifications 12 | ENERGY STAR | Contacts | Help | Sign Out". The user is identified as "ekatezayko1" with a "Settings" link. The main navigation tabs include "MyPortfolio", "Sharing" (which is active), "Reporting", and "Recognition".

Under the "Sharing" tab, there are two main sections:

- My Shared Properties (2)**: This section contains three buttons: "Share (or Edit Access to) a Property", "Set Up Web Services/ Data Exchange", and "Download Sharing Report".
- Sharing Notifications (8) View All**: This section shows a list of notifications. Two notifications are visible:
 - Notification 1: "Main Warehouse - Sharing request sent to Kelly Koser". It has "Cancel" and "Clear" buttons.
 - Notification 2: "Main Warehouse - Sharing request sent to Chris Weatherly". It also has "Cancel" and "Clear" buttons.



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

Using the Data Quality Checker

- You can use Portfolio Manager's Data Quality Checker at any time to run a quick analysis on the data you have entered for a given building.
- On the Summary Tab, locate the Data Quality Checker box and click **Check for Possible Errors**.
- The Data Quality Checker will check data for one full year at a time.

The screenshot shows the Energy Star Portfolio Manager interface for a building named "Sample Office". The address is 123 Main St, Seattle, WA 98121. The Portfolio Manager Property ID is 34550597, and the building was built in 1980. The interface is currently on the "Summary" tab, with other tabs for "Details", "Energy", "Water", "Waste & Materials", "Goals", and "Design".

Key features visible include:

- Weather Normalized Source EUI (kBtu/ft²):** Current: N/A, Baseline: N/A.
- Metrics Summary Table:**

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total (Location-Based) GHG Emissions Intensity (kgCO ₂ e/ft ²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

At the bottom of the interface, there is a "Data Quality Checker" section with the instruction: "Run a check for any 12-month time period to see if there are any possible errors found with your data." and a prominent "Check for Possible Errors" button.

Using the Data Quality Checker

- Portfolio Manager will present all found errors in your property data in dropdowns for each issue.
- In addition to identifying the problem, steps are provided to fix the issue.

Data Quality Checker for [Sample Office](#)

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your year of interest, review your alerts, and follow the links to view or correct your data as needed.

Select Timeframe & Run Checker

We check data for a full year (12 months) of meter consumption and Property Use Details (called a [Metric Year](#)). Select a [Year Ending Date](#) and click "run checker" to see possible data issues.

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

Do not have at least one meter active for each of the 12 months in the year selected.

Problem: There is no [active meter](#) for the time period of 01/01/2023 - 12/31/2023, based on the meter active dates you have provided.

What to do: Review the active dates below and click on the name to make corrections if necessary.

- [Electric Grid Meter](#) (active on 01/01/2024)
- [Natural Gas](#) (active on 01/01/2024)

Property has no water meters.

Property has no waste or material meters.

[Cancel](#)

About Timeframes

The Data Quality Checker needs one full calendar year of [Property Use Details](#) and [meter](#) information for most checks. Otherwise, we will show you basic alerts to let you know what's missing.

About Alerts

Indicates data is incomplete or missing. Most likely at least some metrics are not able to be calculated as a result. Issue should be resolved as soon as possible.

Indicates data is atypical for the type of property and its associated use. Data should be checked for errors to ensure metrics are correct for the property.



How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- **Generate reports to assess progress**

Reporting Tab

Choose from pre-set chart & graph options

The screenshot shows the 'Reporting' tab in a software interface. At the top, there are navigation tabs: MyPortfolio, Sharing, Reporting (selected), Recognition, Admin, and Processing. Below the tabs, there are two main sections. The left section is titled 'Charts & Graphs' and features a large graphic with icons representing energy and emissions, with the text 'Total GHG Emissions Intensity' and 'What is the carbon footprint resulting from my properties' energy use?'. The right section is titled 'ENERGY STAR Performance Documents' and lists several document types: Statement of Energy Performance (SEP), Statement of Energy Design Intent (SEDI), Data Verification Checklist, Progress & Goals Report, ENERGY STAR Scorecard, and Water Scorecard. Below these sections, there are two tabs: 'My Custom Reports' and 'ENERGY STAR Reports'. A 'Create a New Template' button is located to the right of the 'ENERGY STAR Reports' tab. Below the tabs is a table with columns for Name, Status, and Action.

Name	Status	Action
Energy Performance	Last Modified: 1/28/2020 10:52 AM	I want to...
Waste Performance	Last Modified: 1/28/2020 5:59 AM	I want to...
Partner of the Year Report	Last Modified: 1/27/2020 1:42 PM	I want to...
ENERGY STAR Certification Status	Last Modified: 1/27/2020 10:10 AM	I want to...
Emissions Performance	Last Modified: 1/26/2020 12:01 PM	I want to...
Water Performance	Last Modified: 1/24/2020 11:36 AM	I want to...

Download performance documents

Create and generate templates & reports



Performance Documents

ENERGY STAR Performance Documents

 [Statement of Energy Performance \(SEP\)](#)

 [Statement of Energy Design Intent \(SEDI\)](#)

 [Data Verification Checklist](#)

 [Progress & Goals Report](#)

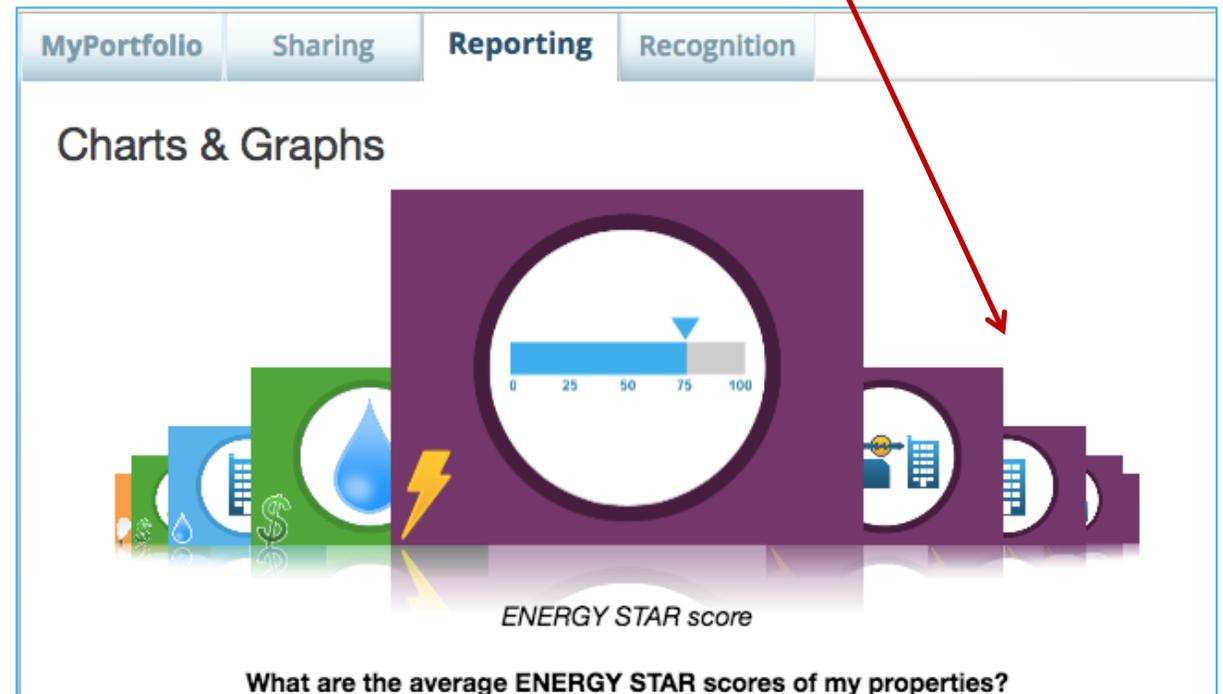
 [ENERGY STAR Scorecard](#)

 [Water Scorecard](#)

Charts and Graphs

- Source EUI
- Site EUI
- ENERGY STAR score
- Weather normalized source EUI
- Weather normalized site EUI
- Total GHG emissions intensity
- Energy cost intensity
- Indoor water intensity
- Indoor water cost intensity
- Building emissions report

Scroll through to see available Charts & Graphs.





Charts & Graphs



Weather Normalized Source EUI

How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Scorecard](#)
- [Water Scorecard](#)

Charts and Graphs

Data Requests from Others

My Reports and Templates

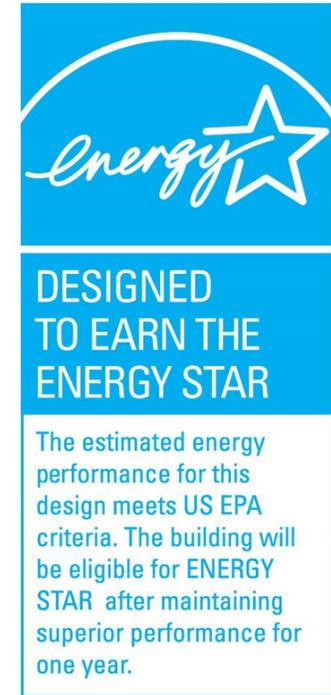
ENERGY STAR Reports

Create a New Template

Create and generate templates & reports

Name	Status	Action
Performance Highlights	Last Modified: 6/16/2022 12:25 PM	I want to... <input type="button" value="v"/>
ENERGY STAR Certification Status	Last Modified: 6/16/2022 11:35 AM	I want to... <input type="button" value="v"/>
Building Emissions Calculator Import	Last Modified: 6/16/2022 10:14 AM	I want to... <input type="button" value="v"/>
Waste Performance	Last Modified: 6/16/2022 10:11 AM	I want to... <input type="button" value="v"/>

ENERGY STAR Recognition





Extra Help

- Visit www.energystar.gov/buildingshelp
 - Extensive list of FAQs
 - Online form to submit technical questions or comments
- Additional Portfolio Manager training resources available at: www.energystar.gov/buildings/training
 - Step-by-step documents (PDF)
 - Access to recorded trainings and short videos
 - Information on upcoming trainings
- Ask the Expert
 - Wednesdays at 12:00 noon ET. It's an open Q&A session for Portfolio Manager questions.
 - <https://energystar-mesa.force.com/PortfolioManager/s/article/When-are-the-Ask-The-Expert-webinars-1600088554111>
- Register for regular webinars at: <http://esbuildings.webex.com>
- Portfolio Manager Technical Reference Series: https://www.energystar.gov/buildings/tools-and-resources?f0=im_field_select_primary_category:1522





City of Dallas

Energy Management & Energy Benchmarking Program for City Buildings

June 20, 2024

**Srinivas Vemuri, PhD, PE, CEM®
Senior Program Manager
Building Services Department**

Presentation Overview

- **Background**
- **Energy Benchmarking**
- **Outcome**

Background

- City approximately has 3,000+ active electricity accounts
- For FY2022-23 electricity usage for entire City operations was approximately 684,000 MWh at an energy cost of approximately \$55M
- Building Services Department maintains approximately 500+ City-owned buildings
- Approximately 200 City buildings contribute to 80%+ energy usage out of 500+ City buildings

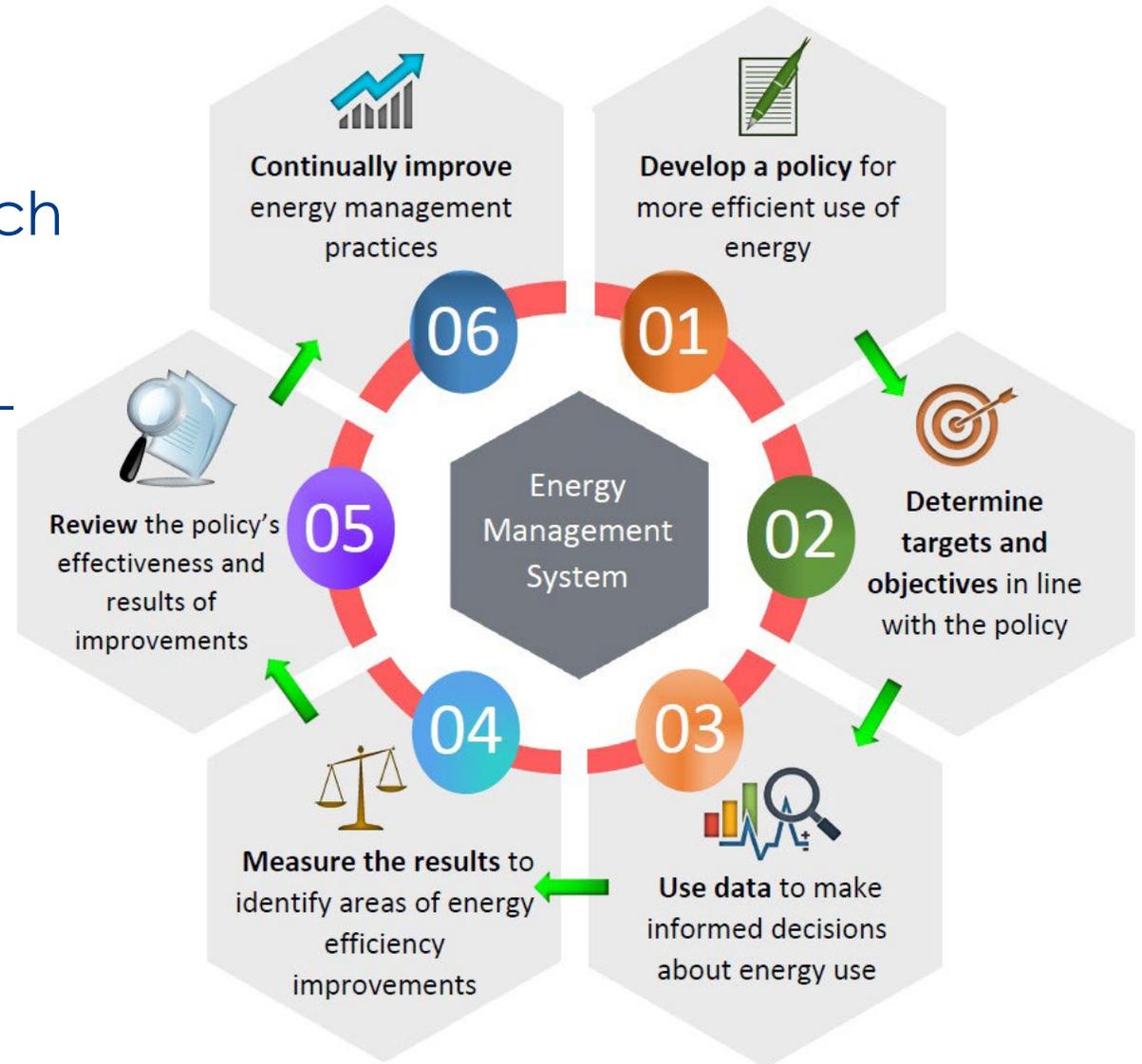
Background

- April 10, 2019, City Council adopted the Green Energy Policy (CR 19-0484) documenting the City of Dallas' commitment to:
 - Use clean and efficient energy
 - Purchase 100 percent renewable energy
 - Promote renewable energy projects and partnerships that reduce environmental impacts

Background

Energy Management System

- Systematic and iterative approach to intentional energy decisions
- Largely based on plan-do-check-act model
- Anticipated results:
 - Reduced environmental footprint (reduced energy consumption/ increased renewable energy generation)
 - Reduced energy costs



Background

- Overarching energy goals and mandates
 - In 2020, Dallas City Council approved a “Comprehensive Environmental and Climate Action Plan (CECAP)” to reduce City of Dallas greenhouse gas emissions by 43% below 2015 levels by 2030 and 100% by 2050 to achieve carbon neutrality.

Energy Benchmarking

Energy Benchmarking using EPA ENERGY STAR Portfolio Manager



- Benchmarking energy consumption of City facilities to help identify underperforming facilities and prioritize energy conservation measures
- Currently 195 City facilities (6.5 million sf), majority of the public facing facilities, have been benchmarked for energy usage
- Target is to benchmark energy usage for 200 City facilities

Outcome

Some key outcomes from Energy Benchmarking data

- Energy/solar audits completed for 45 City facilities which were prioritized based on EUI data from energy benchmarking
- Completed approximately \$2M in renewable energy & energy efficiency projects at 6 City facilities based on energy/solar audit data
- \$6M in renewable energy & energy efficiency projects currently in design/programming phase at 10 City facilities based on energy/solar audit data
- Received approximately \$190k in Oncor incentives for completing renewable energy & energy efficiency projects
- Publishing annual energy reports

ENERGY STAR Portfolio Manager Webinar

June 20, 2024

*Presented by: Andra Nava-Garcia,
Office of Sustainability*





ENERGY STAR Portfolio Manager

SUSTAINABILITY

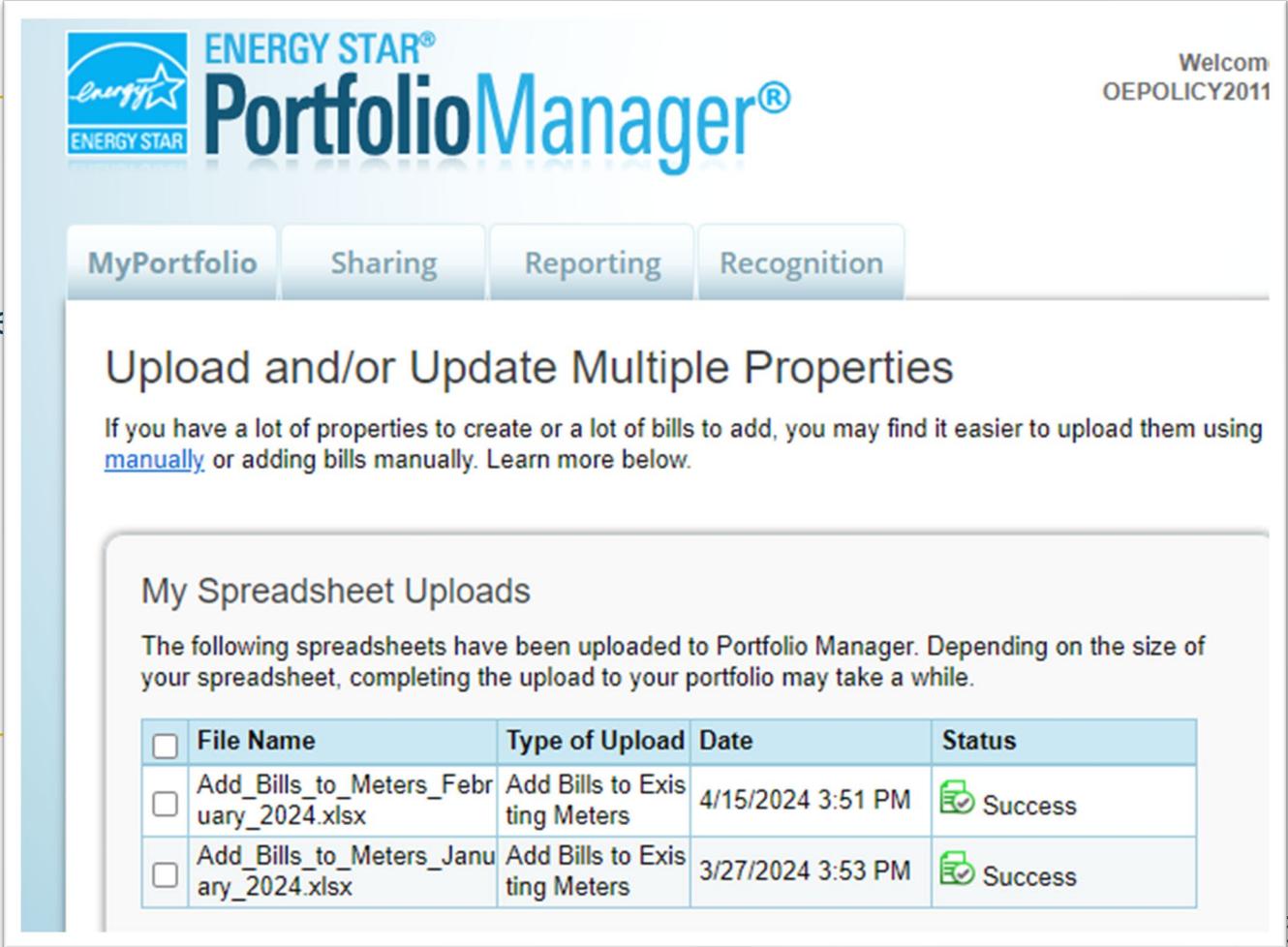
General Information

- 2011
- 270+ Municipal facilities (Libraries, Offices, Convention Center, Retail, Fire & Police Stations, Warehouses, Parking, Data Centers, Pre-school/Daycare centers, etc.)
- 12,600,000 (sq. feet)
- Energy benchmarking

ENERGY STAR Portfolio Manager

Best Practices

- Upload Data Using Spreadsheet Template
- Regular data updates and audits
- Monthly uploads



The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top, there is a navigation bar with tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main heading is 'Upload and/or Update Multiple Properties'. Below this, there is a text block explaining that users can upload multiple properties or bills manually. A section titled 'My Spreadsheet Uploads' contains a table listing two successful uploads.

<input type="checkbox"/>	File Name	Type of Upload	Date	Status
<input type="checkbox"/>	Add_Bills_to_Meters_February_2024.xlsx	Add Bills to Existing Meters	4/15/2024 3:51 PM	 Success
<input type="checkbox"/>	Add_Bills_to_Meters_January_2024.xlsx	Add Bills to Existing Meters	3/27/2024 3:53 PM	 Success

ENERGY STAR Portfolio Manager

Benefits

- Track building performance
- Reports and Templates
- Sharing (centralized platform)

The screenshot displays the 'Reporting' tab of the ENERGY STAR Portfolio Manager interface. It features a 'Charts & Graphs' section with a central graphic and a question: 'Weather Normalized Source EUI: How much total primary fuel would be required by my properties, under average weather conditions?'. Below this is a table titled 'Data Requests from Others' with columns for Name, Status, and Action.

Name	Status	Action
COSA Sq. Ft.	Generated: 6/17/2024 3:13 PM	I want to...
COSA CY2023 Gas Data	Generated: 4/30/2024 4:01 PM	I want to...
Municipal On-site Solar PV Project	Last Modified: 1/29/2024 3:15 PM	I want to...
COSA FY10-21 Utility Data	Last Modified: 1/21/2024 6:52 PM	I want to...

The screenshot displays the 'Sharing' tab of the ENERGY STAR Portfolio Manager interface. It features a 'My Shared Properties (298)' section with buttons for sharing and downloading reports. Below this is an 'Overview of Shared Properties' section with a table listing shared properties by contact.

Name	Organization	Properties We Share	Action
Alejandra Longoria (alongoria)	City of San Antonio - Office of Sustainability	273	I want to...
Alexander Martinez (alexmart)	City of San Antonio	296	I want to...



Energy Star Trainings

Energy STAR offers free trainings on energy usage and emissions. Be sure to check out the “Training” page on the Energy STAR website to learn more and access these free webinars and guides.

Access the trainings at this link or by scanning the QR code below:

<https://www.energystar.gov/buildings/training>



Council of Governments Contacts

West Central Texas Council of Governments

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Alamo Area Texas Council of Governments

Lyle Hufstetler

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North Central Texas Council of Governments

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