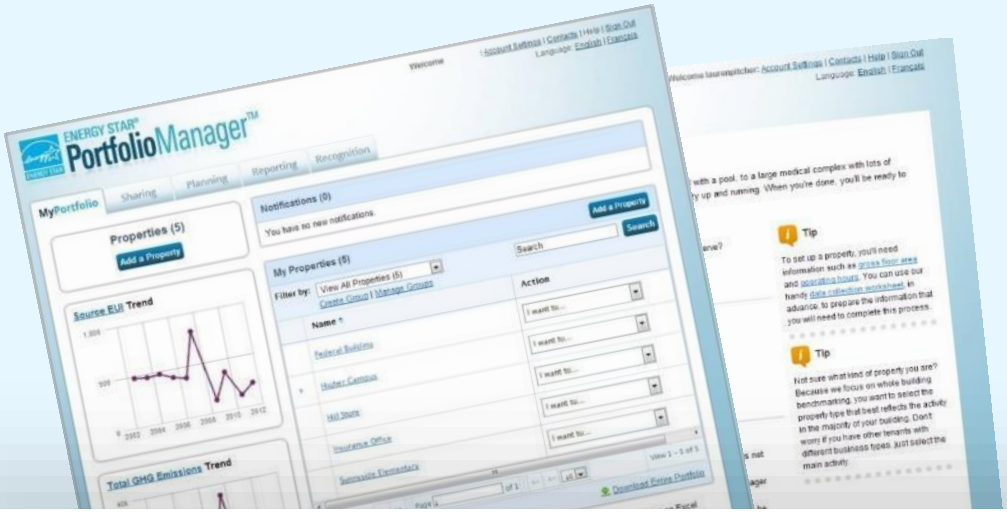
Portfolio Manager® 301



ENERGY STAR®

PortfolioManager®

Learning Objectives

In this session, you will learn about EPA's ENERGY STAR Portfolio Manager tool and how to:

- Update data using the spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reporting templates
- Use the Sustainable Buildings Checklist

How To

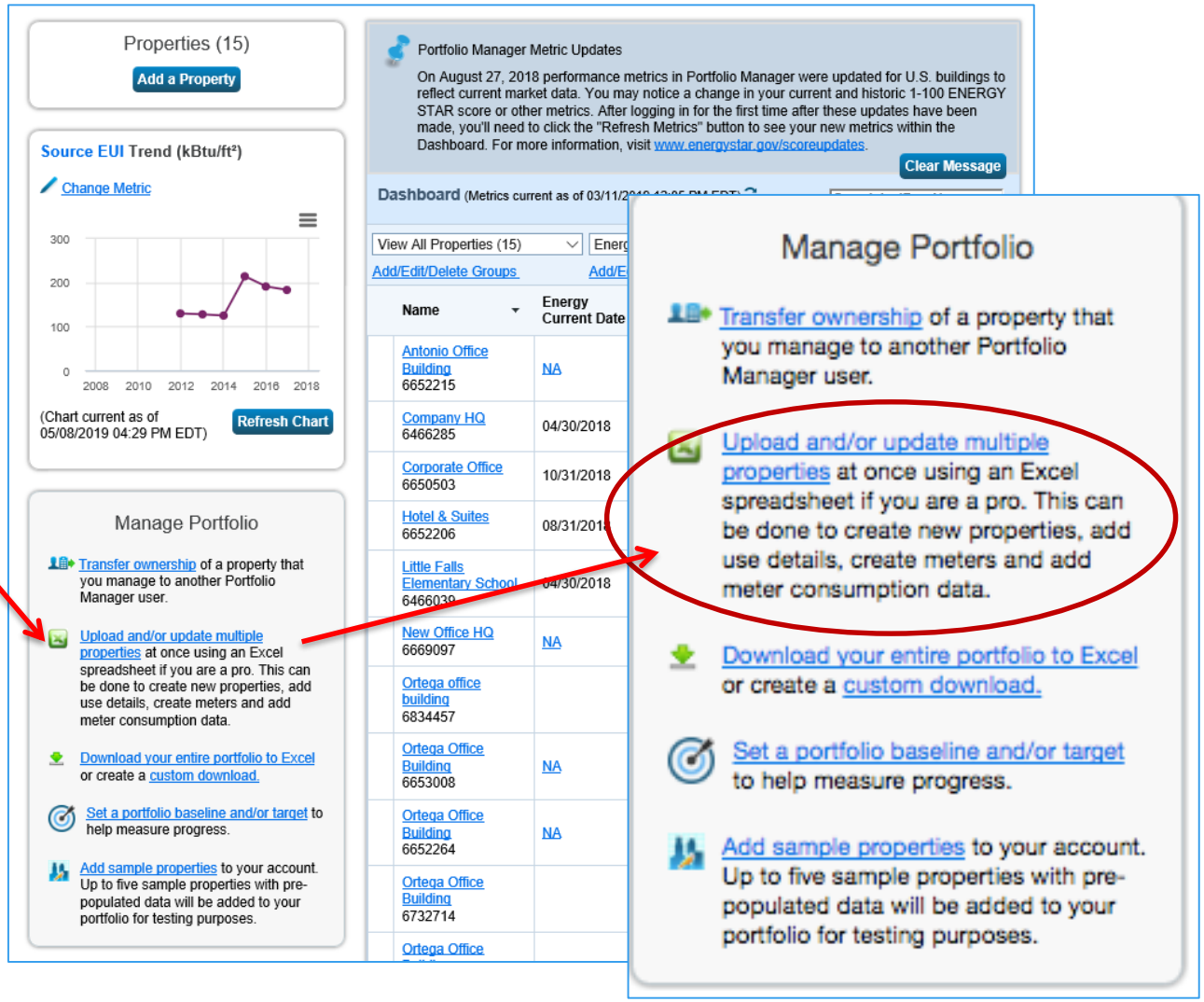
- Update data using the spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reporting templates
- Use the Sustainable Buildings Checklist

Update data using the spreadsheet upload feature

Action	Process
1 Create property records (add new records to account)	a) Download spreadsheet b) Fill in data c) Upload to PM
2 Create meters 3 Add consumption to meters 4 Edit basic property information 5 Update property use details	a) Select properties to update b) Download custom spreadsheet c) Fill in data d) Upload to PM

Update data using the spreadsheet upload feature

Scroll to Manage Portfolio menu



Spreadsheet Upload Overview

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 entering 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 IDs, 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: * Please select type

Upload Template: * Browse... Upload

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

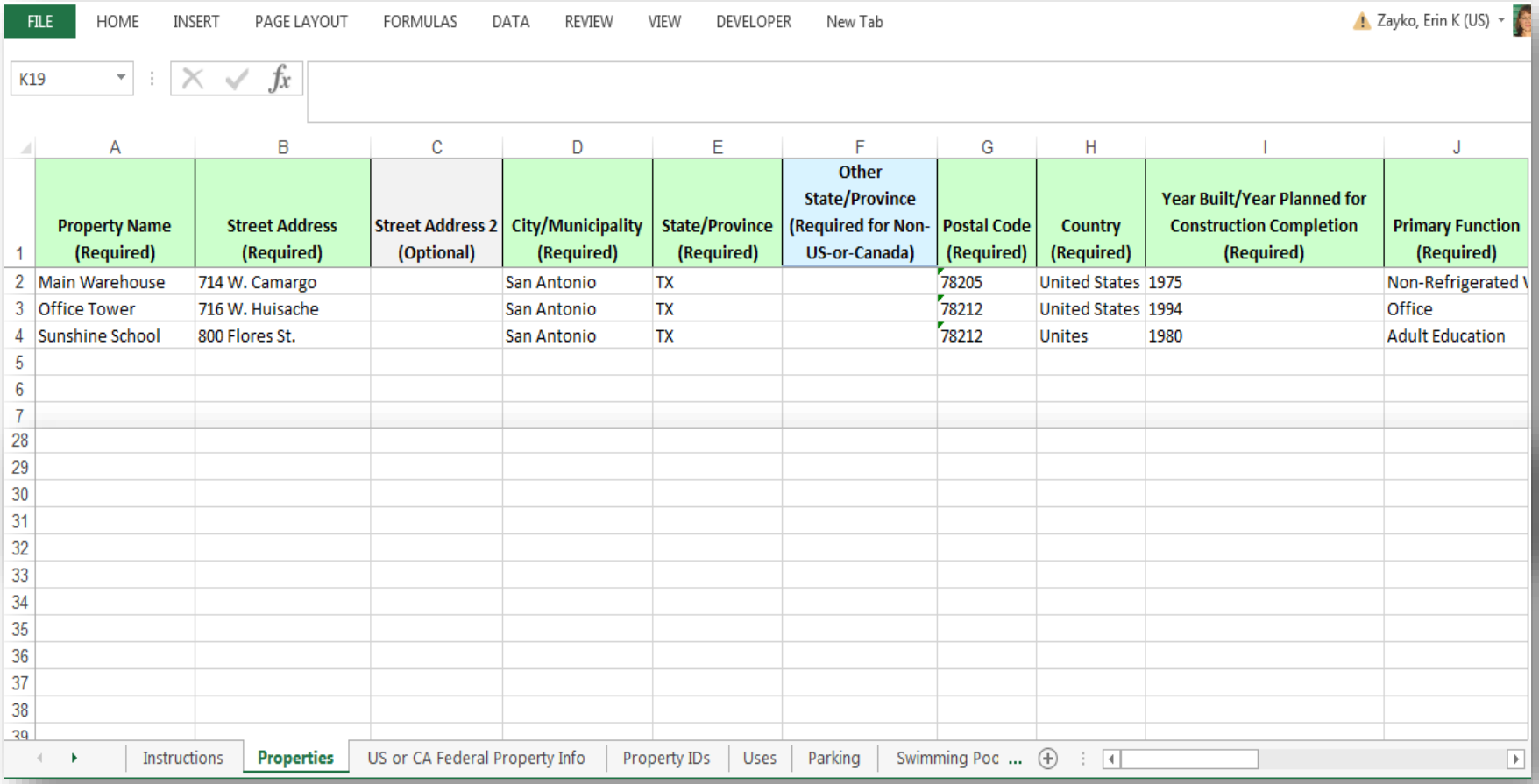
This is a powerful feature. Be careful!

- 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 upload is processing, 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 edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

Create an Upload Template



Property Name (Required)	Street Address (Required)	Street Address 2 (Optional)	City/Municipality (Required)	State/Province (Required)	Other State/Province (Required for Non-US-or-Canada)	Postal Code (Required)	Country (Required)	Year Built/Year Planned for Construction Completion (Required)	Primary Function (Required)
Main Warehouse	714 W. Camargo		San Antonio	TX		78205	United States	1975	Non-Refrigerated W
Office Tower	716 W. Huisache		San Antonio	TX		78212	United States	1994	Office
Sunshine School	800 Flores St.		San Antonio	TX		78212	Unites	1980	Adult Education

- Read the Instructions tab.
- At a minimum, complete the green required fields on the Properties tab.
- Don’t make any format changes to the spreadsheet.

Add New Properties: Upload Completed Spreadsheet

Upload filled out templates:

Select Template

Upload

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 entering 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 IDs, 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:

- ✓ Please select type
- Add New Properties
- Add Bills to Existing Meters
- Add Meters to Existing Properties
- Update Use Details for Existing Properties
- Edit Basic Information for Existing Properties

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 upload is processing, 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 edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

Create an Upload Template

Add Meters/ Add Bill Data/ Edit Basic Property Info

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 entering 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 IDs, 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: * Please select type

Upload Template: * Choose File No file chosen Upload

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 upload is processing, 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 edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

Create an Upload Template

Add Bills to Existing Meters: Create Custom Upload Template

MyPortfolio | Sharing | Reporting | Recognition

Create a Custom Upload Template

If you want to add property use or meter information for multiple properties, you can do this by using an Excel spreadsheet. First tell us some information about what you are trying to upload to Portfolio Manager so we can create a spreadsheet template for you to use. Then simply fill it in with your information and upload it!

1 Select the Task You are Performing

- ○ Add Meters to Existing Properties
- ◉ Add Bills to Existing Meters (i.e., meter consumption information)
- ○ Update Use Details for Existing Properties (e.g. Weekly Hours of Operation, Number of Workers, etc.)
- ○ Edit Basic Property Information for Existing Properties (such as name and address)

2 Select Properties to Include

Properties: * All Properties

3 Select Detailed Information to Include

Energy Meter Types:
- ☑ Electric
  - ☑ purchased from the grid
    - How many bills for this type of meter (per property)? 1
  - ☐ generated on site with my own solar panels
- ☐ Natural Gas
- ☐ Fuel Oil (No. 2)

Water Meter Types:
- ☐ Municipally Supplied Potable Water

Waste and Material Meter Types:
- ☐ Disposed Waste and Materials
- ☐ Recycled Waste and Materials

Create & Download Template Cancel

Warning - Don't Change Columns!

In order for your upload to work you cannot Add, Delete or Re-Order columns in the custom spreadsheet. We create the template based on your data, and we need a specific format in order for your upload to succeed.

Creating New Properties?

If you need to add new properties, you do not need to create a custom upload template. You can add new properties manually or by using the Add Property Excel Template.

Selecting Details

The choices provided here correspond to the properties you have selected in Step 2. If you don't see what you are looking for, take a look at the property and make sure that the use or meter types are set up.

Add_Bills_to_Meters.xlsx - Excel

ME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW DEVELOPER New Tab

	B	C	D	E	F	G	H	I	J
	Meter Consumption ID (Pre-filled)	Portfolio Manager ID (Pre-filled)	Property Name (Pre-filled)	Meter Name (Pre-filled)	Meter Type (Pre-filled)	Start Date (Required)	End Date (Required)	Usage (Required)	Meter Unit (Pre-filled)
6	555289379	4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase	Last Bill 4/30/2015	5/31/2015	73412	kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
6		4419445	Heinlein Office Bldg	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0	520311565	4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase	Last Bill 4/1/2015	4/30/2015	95352	kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)
0		4427299	Metro Office Building	Electric Grid Meter	Electricity - Grid Purchase				kWh (thousand Watt-hours)

Instructions | Add Bills-Electricity | Add Bills-Non Electric

- Read the Instructions tab.
- At a minimum, complete the green required fields.
- Don't make any format changes to the spreadsheet.

Status of upload appears here

Select the upload type then "Upload"

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 entering each property manually or adding bills manually. Learn more below.

My Spreadsheet Uploads

The following spreadsheets have been uploaded to Portfolio Manager. Depending on the size of your spreadsheet, completing the upload to your portfolio may take a while.

	File Name	Type of Upload	Date	Status
	Add_Properties_warehouse.xlsx	New Property	10/29/2015 11:08 AM	Success
	Add_Properties_warehouse.xlsx	New Property	10/29/2015 11:06 AM	Failed View Errors

Delete Selected Entries

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 IDs, 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: * Add Bills to Existing Meters

Upload Template: * Browse... Add_Bills_to_Meters.xlsx Upload

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.

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

Create an Upload Template

Add Bills to Existing Meters: Upload Spreadsheet

Upload filled out templates:

Select Template

Upload

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 entering 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 IDs, 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:

- ✓ Please select type
- Add New Properties
- Add Bills to Existing Meters
- Add Meters to Existing Properties
- Update Use Details for Existing Properties
- Edit Basic Information for Existing Properties

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 upload is processing, 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 edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

Create an Upload Template

Pop Quiz!

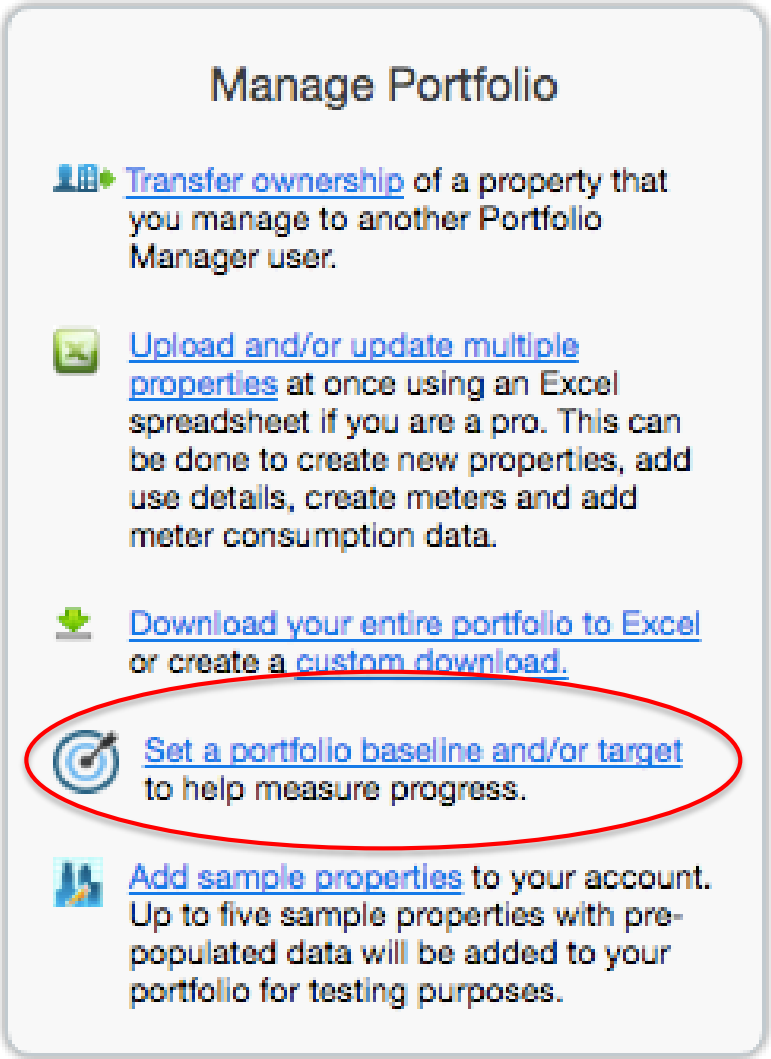
1. When using the spreadsheet upload feature, you should do which of the following?
    a. Use the template provided in Portfolio Manager without making any changes to the format of the spreadsheet
    b. Use your own template
    c. Only fill out some of the required fields
    d. Use formulas for numeric values

Pop Quiz!

1. When using the spreadsheet upload feature, you should do which of the following?
   a. **Use the template provided in Portfolio Manager without making any changes to the format of the spreadsheet**
   b. Use your own template
   c. Only fill out some of the required fields
   d. Use formulas for numeric values

Using a different template, only filling out some required fields, or changing formatting or formulas can prevent your upload from being successful.

Set a Portfolio Baseline and/or Target



Set One Baseline and Target for All Properties

Set Baselines & Target for All Properties

You can establish the same performance baseline and target for all of your properties. **Be careful! Selections here will overwrite any baseline or target selections you have already made for your individual properties.** If you prefer to set baselines and targets for each property individually, you can do that on each property page (Goals tab). Just like for individual properties, to establish a performance target, you must first set a baseline year for comparison. Then, you can establish an energy target by either defining a target score or a target reduction (%).

Baselines

Energy Baseline: * Select a baseline year: Month Year
- Let Portfolio Manager automatically set my baselines
- Leave property-specific baselines as currently set

Water Baseline: * Select a baseline year: Month Year
- Let Portfolio Manager automatically set my baselines
- Leave property-specific baselines as currently set

Waste Baseline: * Select a baseline year: Month Year
- Let Portfolio Manager automatically set my baselines
- Leave property-specific baselines as currently set

Energy Target

Target Metric: * Leave property-specific targets as set

Target Value:

Save Baselines & Target Cancel

Selecting Baselines

A baseline is made up of 12 full calendar months of use information as well as meter entries (either energy, water, or waste/materials). It is defined by selecting the last month in the time frame (also known as the Year Ending Date). You can choose to select the same baseline date for all your properties or Portfolio Manager can automatically determine the baseline for each individual property by calculating the earliest eligible year ending date. If you have set specific baselines for individual properties, make sure to choose the option to leave them alone, or they will be overwritten.

Be Careful

Setting baselines and targets using this form will re-set any targets or baselines you have set for your properties individually.

Property Goals Tab: View Specific Property Goals & Improvements

Goals tab at the Property level

MyPortfolio | Sharing | Reporting | Recognition

Change Metric

Company HQ

1200 New York Avenue NW, Washington, DC 20005 | Map It

Portfolio Manager Property ID: 6466285

Year Built: 1996

Edit

Not eligible to apply for ENERGY STAR Certification

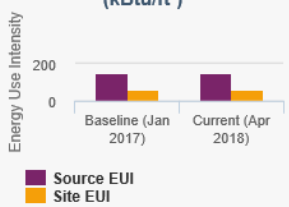
ENERGY STAR Score (1-100)

Current Score: 63

Baseline Score: 63

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

Energy Performance (kBtu/ft²)



Metrics Comparison for Your Property & Your Target

Change Time Period

Metric	Jan 31 2017 (Energy Baseline)	Apr 30 2018 (Energy Current)	Target*	Median Property*
ENERGY STAR score(1-100)	63	63	75	50
Source EUI(kBtu/ft²)				
Site EUI(kBtu/ft²)				
Source Energy Use(kBtu)				
Site Energy Use(kBtu)				
Energy Cost($)				
Total GHG Emissions(Metric Tons CO2e)				

* To compute the metrics at the property's current energy use.

Generate & Download Performance Documents for this Property

Statement of Energy Performance (SEP)

ENERGY STAR Scorecard

Progress & Goals Report

Baselines & Targ

Baselines & Targets

	Baselines	Target
Energy	01/31/2017	75
Water	12/31/2008	Not Available
Waste/Materials	Not Available	Not Available

Set Baselines or Target

Add/Edit Baselines or Targets

Choose baselines or let Portfolio Manager select automatically

<u>Target Options</u>

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

MyPortfolio | Sharing | Reporting | Recognition

Set Performance Baseline & Target

To establish a performance target, you must first set a baseline for comparison. Then, you can establish a performance target by either defining a target rating or a target reduction (%). The energy use and costs displayed reflect required levels to meet either the target rating or percent reduction goal for this property.

Targets are not available at this time for water or waste/materials, however setting a baseline can still provide you with a starting point on which to evaluate your property's progress.

Baselines

Energy Baseline: ○ Select a baseline: 01/31/2017 ◉ Let Portfolio Manager automatically set my baselines

Water Baseline: ○ Select a baseline: 12/31/2008 ◉ Let Portfolio Manager automatically set my baselines

Waste Baseline: You must have at least one waste/material meter to select a waste baseline. After you add a meter, don't forget to include your meter in your metrics as well.

Energy Target

Energy Target Metric: * Target ENERGY STAR Score

Energy Target Value: * 75 1-100 value

Save & Calculate Other Metrics

Select "Calculate Other Metrics" to refresh the table after making changes to "Target Metric" and "Target Value"

Selecting Baselines

A baseline is made up of 12 full calendar months of use information as well as meter entries (either energy, water, or waste/materials). It is defined by selecting the last month in the time frame (also know as the Year Ending Date). Portfolio Manager can automatically determine your baseline by calculating the earliest eligible year ending date.

About Design Targets

On this page you can set a target for your property to track its progress after it has become operational. If your property is still in the design stage, you can use the design features to set design targets.

If you are seeing "Not Available"...

The Current and Baseline metrics (in the chart to the left) require 12 full months of energy consumption and property use information. The Target metrics may also

Pop Quiz!

2. True or False: When setting energy and water baselines, you must select the same date for all properties in your Portfolio Manager account.
    a. True
    b. False

Pop Quiz!

2. True or False: When setting energy and water baselines, you must select the same date for all properties in your Portfolio Manager account.
   a. True
   b. **False**

You can choose to set baselines across your entire portfolio, or individually at the property level! At the portfolio level, you can select "Let Portfolio Manager automatically set my baselines" or "Leave property-specific baselines as currently set," which will apply different baselines according to what is in each property record.

How To

- Update data using spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reporting templates
- Use the Sustainable Buildings Checklist

Download Entire Portfolio

MyPortfolio | Sharing | Reporting | Recognition

Properties (15)

Add a Property

Source EUI Trend (kBtu/ft²)

Change Metric

(Chart current as of 05/08/2019 04:29 PM EDT)

Refresh Chart

Manage Portfolio

Transfer ownership of a property that you manage to another Portfolio Manager user.

Upload and/or update multiple properties at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.

Download your entire portfolio to Excel or create a custom download.

Set a portfolio baseline and/or target to help measure progress.

Add sample properties to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.

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)

Search by ID or Name

View All Properties (15) | Energy Highlights | Refresh Metrics

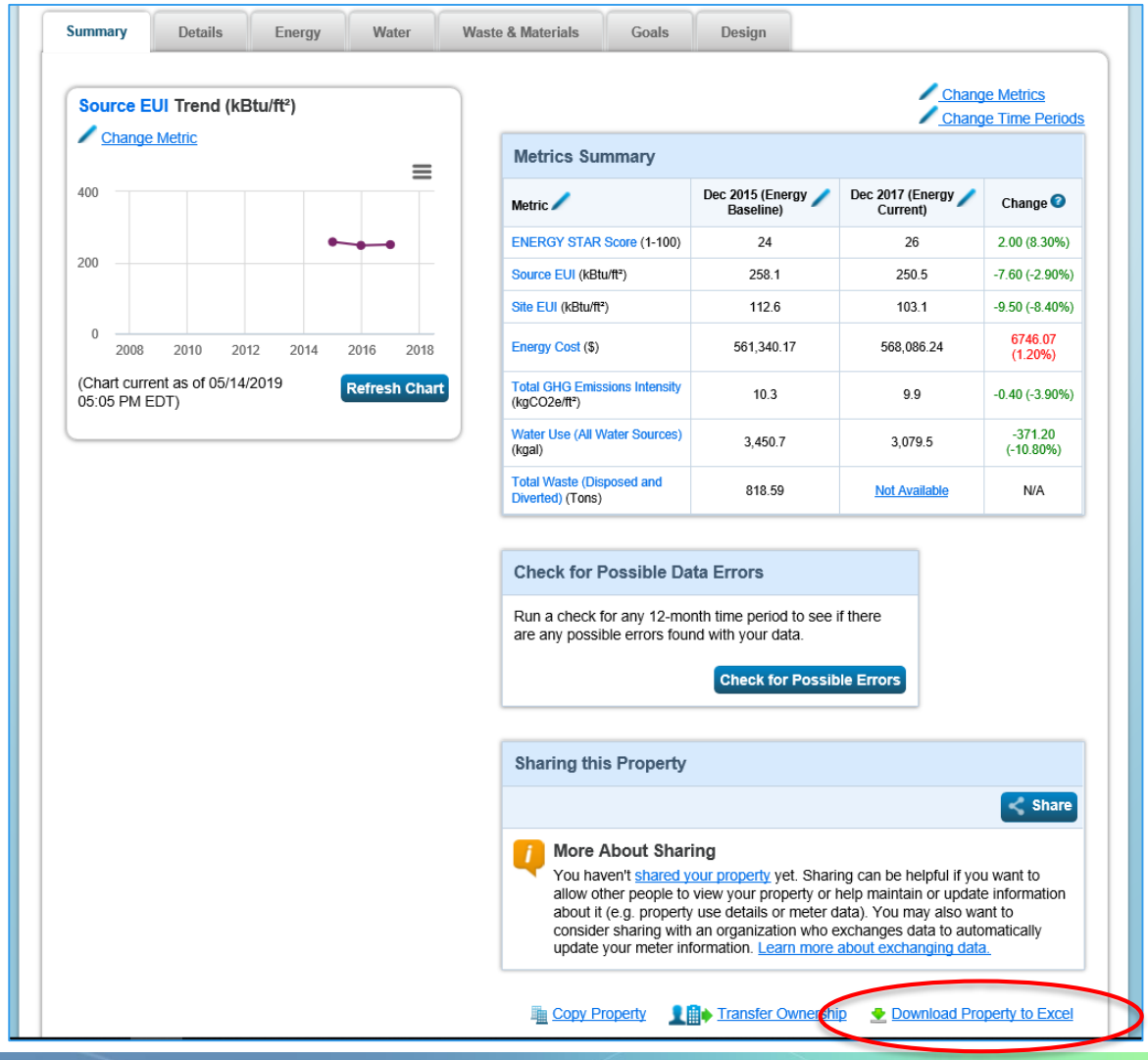
Add/Edit/Delete Groups | Add/Edit/Delete Views

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 Elementa 6466039				
New Offic 6669097				
Ortega of building 6834457				
Ortega Of Building 6653008				
Ortega Of Building 6652264				
Ortega Of Building 6732714				
Ortega Office				

You have asked for Portfolio Manager to collect all of the information in your portfolio into an Excel download. This includes all of your basic property information as well as all historical use information, meters and bills for each property. This could take a while if you have a lot of properties. Are you sure you would like to continue?

Continue | Cancel

Download Property to Excel



Energy Meter Tab

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

Meter Summary

3 Energy Meters Total

3 - Used to Compute Metrics

Add A Meter

Current Energy Date
Mar 31, 2017

Enter Your Bills

Four Ways to Enter Bill Data

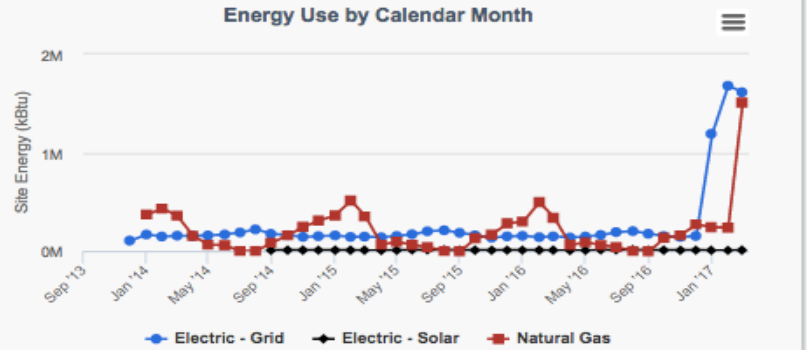
1. Manually
2. Use our simple spreadsheet (one meter) to upload or Copy/Paste
3. Use our complex spreadsheet (multiple meters + multiple properties)
4. Find an organization to electronically enter your data into Portfolio Manager

Your Property is: Edit

- A Single Building
- Part of a Building
- A Campus of Multiple Buildings

You Are Tracking: Edit

- Total energy consumption for your



Export Data by Calendar Month

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 30337007	Electric - Grid	04/16/2017	Yes
Electric Solar Meter 30337005	Electric - Solar	04/16/2017	Yes
Natural Gas 30337004	Natural Gas	04/16/2017	Yes

Download Annual Totals by Meter

Manage Portfolio

Manage Portfolio

Transfer ownership of a property that you manage to another Portfolio Manager user.

Upload and/or update multiple properties at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.

Download your entire portfolio to Excel or create a custom download.

Set a portfolio baseline and/or target to help measure progress.

Add sample properties to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.

MyPortfolio | Sharing | Reporting | Recognition

Create a Custom Download

Whether you have entered one year or ten year's worth of data, you can export your raw data to Excel example download to get a feel for what is included.

Use the form below to choose exactly what data you need to download.

1 Select Properties to Include

Properties: - Select Number of Property(ies) -

2 What type of data do you want to include?

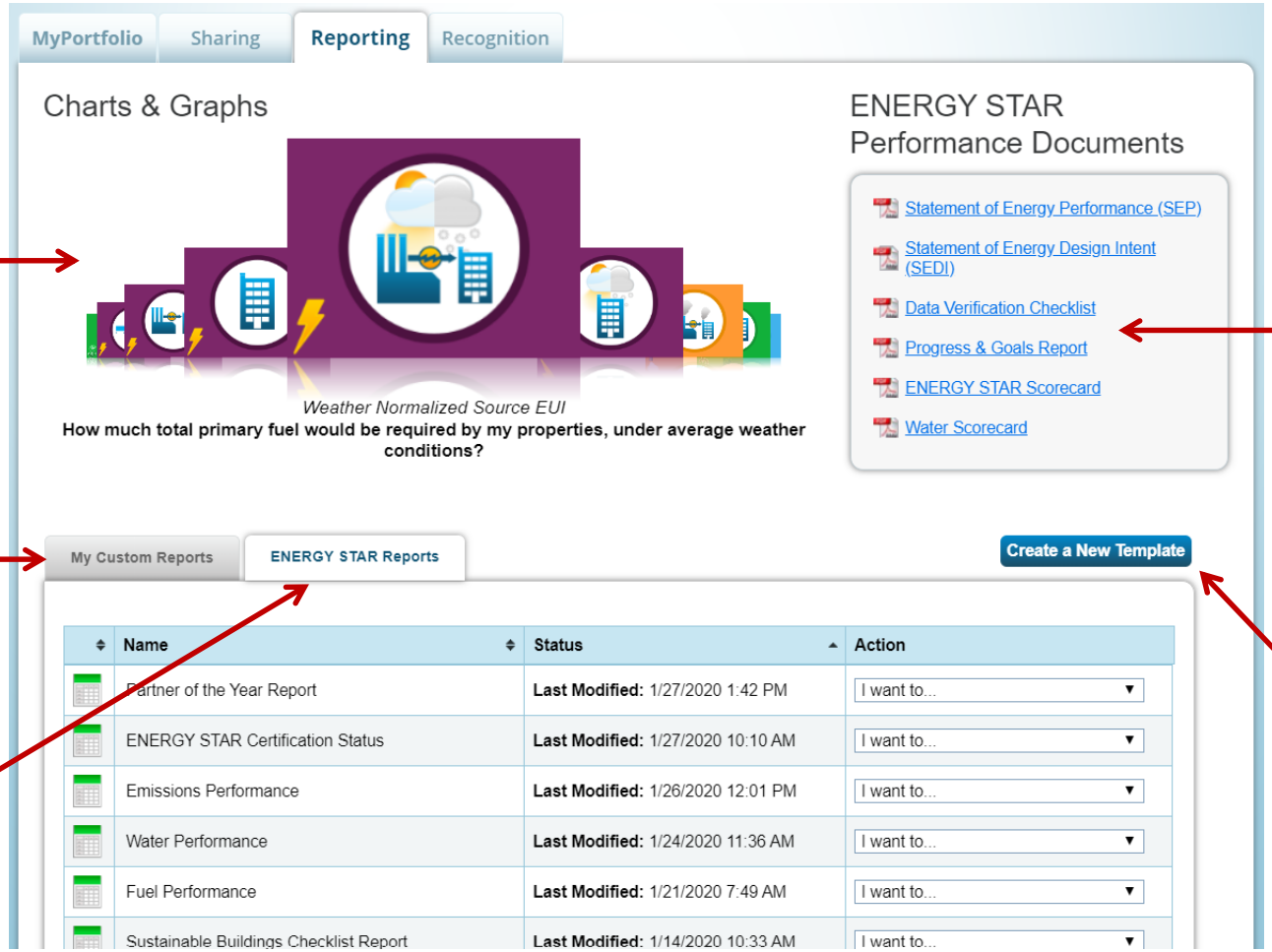
- Basic Property Information
  Download basic property information such as name and address
- Property IDs
  Download property ID's (e.g. Custom ID's, Standard ID's)
- Uses
  Download which uses are at each property (e.g. Office)
- Use Details
  Download the values entered for your use details (e.g. Weekly Operating Hours)
- Meters
  Download basic information such as name, units and dates when the meter was in use.
- Meter Entries
  Download individual meter entries you have entered.

Analyze Progress and Performance on the Reporting Tab

Choose from Pre-set Chart & Graph Options

View and Use Custom Report Templates

View and Use Standard Reports



View and Download Performance Documents

Generate Custom Report Templates

ENERGY STAR 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

MyPortfolio | Sharing | Reporting | Recognition

Generate and Download Reports

Portfolio Manager offers several standard reports for properties that can be useful in communicating your property's progress with others. These reports offer detailed information about your property for a single time period and are presented in a PDF format. You can view sample reports here.

1 Select Report(s) to Download

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

2 Select Property for Report(s)

Property: * Select Property

3 Select Timeframe for Report(s)

Timeframe: * Current Year for: Energy

Generate & Download Report(s) Cancel

Prefer to design your own report?

If none of these reports look like what you need, consider creating a spreadsheet template to pull the data you want and design your own report outside of Portfolio Manager.

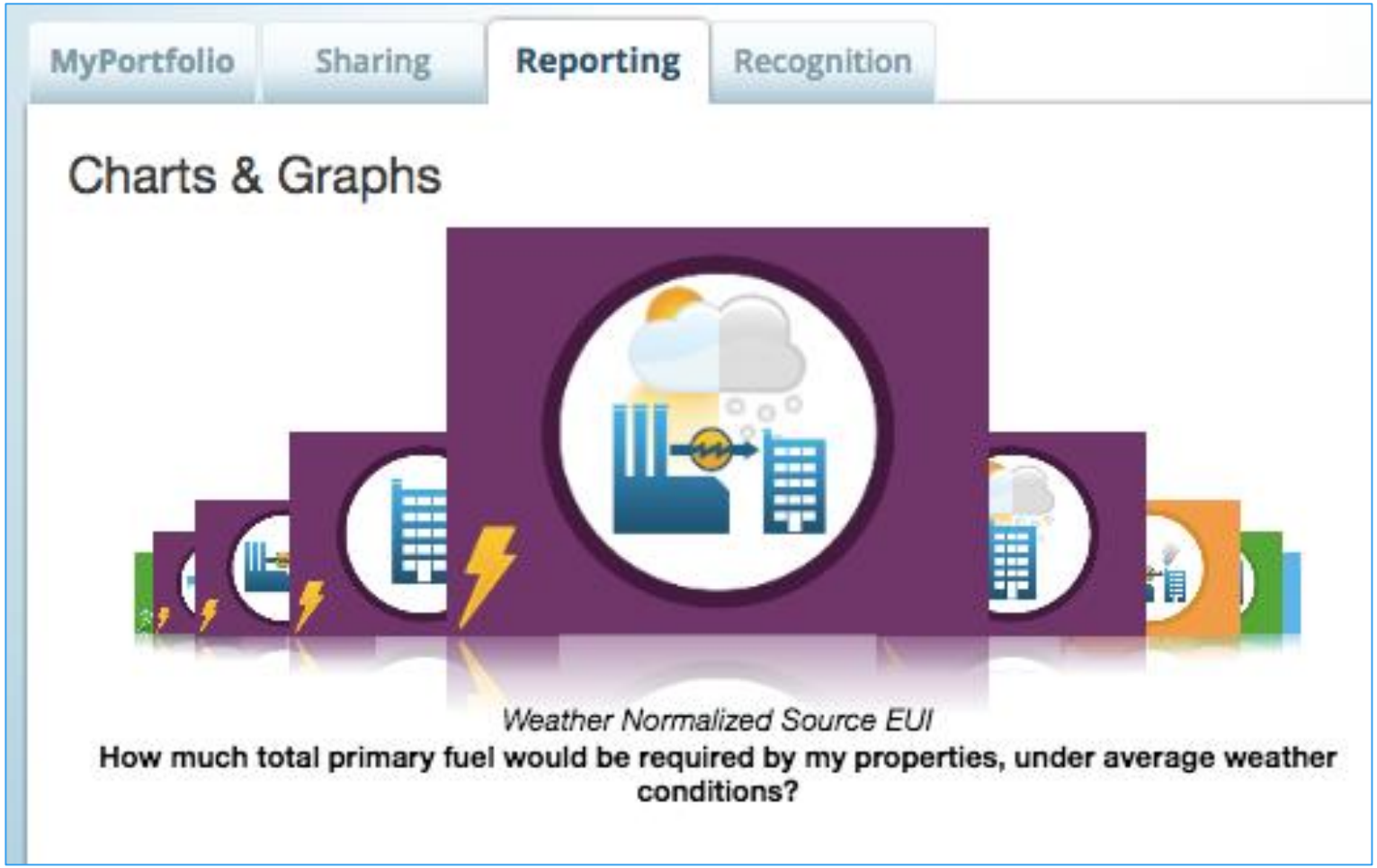
Are you applying for recognition?

Although these reports look similar, if you are applying for either ENERGY STAR certification or Designed to Earn recognition, you must generate the required documentation by way of the application process.

Metrics on your Reports

In order to calculate metrics for your property for a given time period, there must be 12 months of complete meter data and property use detail information. If metrics (including the score) cannot be calculated for any reason, they will appear as "N/A" in your report.

Charts & Graphs



"Standard" ENERGY STAR Reports

My Custom Reports | ENERGY STAR Reports | Create a New Template

Name	Status	Action
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...
Fuel Performance	**Last Modified:** 1/21/2020 7:48 AM	I want to...
Sustainable Buildings Checklist Report	**Last Modified:** 1/14/2020 10:33 AM	I want to...
Energy Performance	**Generated:** 10/01/2019 1:57 PM	I want to...
Waste Performance	**Generated:** 7/09/2019 1:51 PM	I want to...
Performance Highlights	**Generated:** 7/08/2019 1:57 PM	I want to...

Generated reports will only be available for 90 days. After that time you just need to "generate" a new report to populate your template with data.

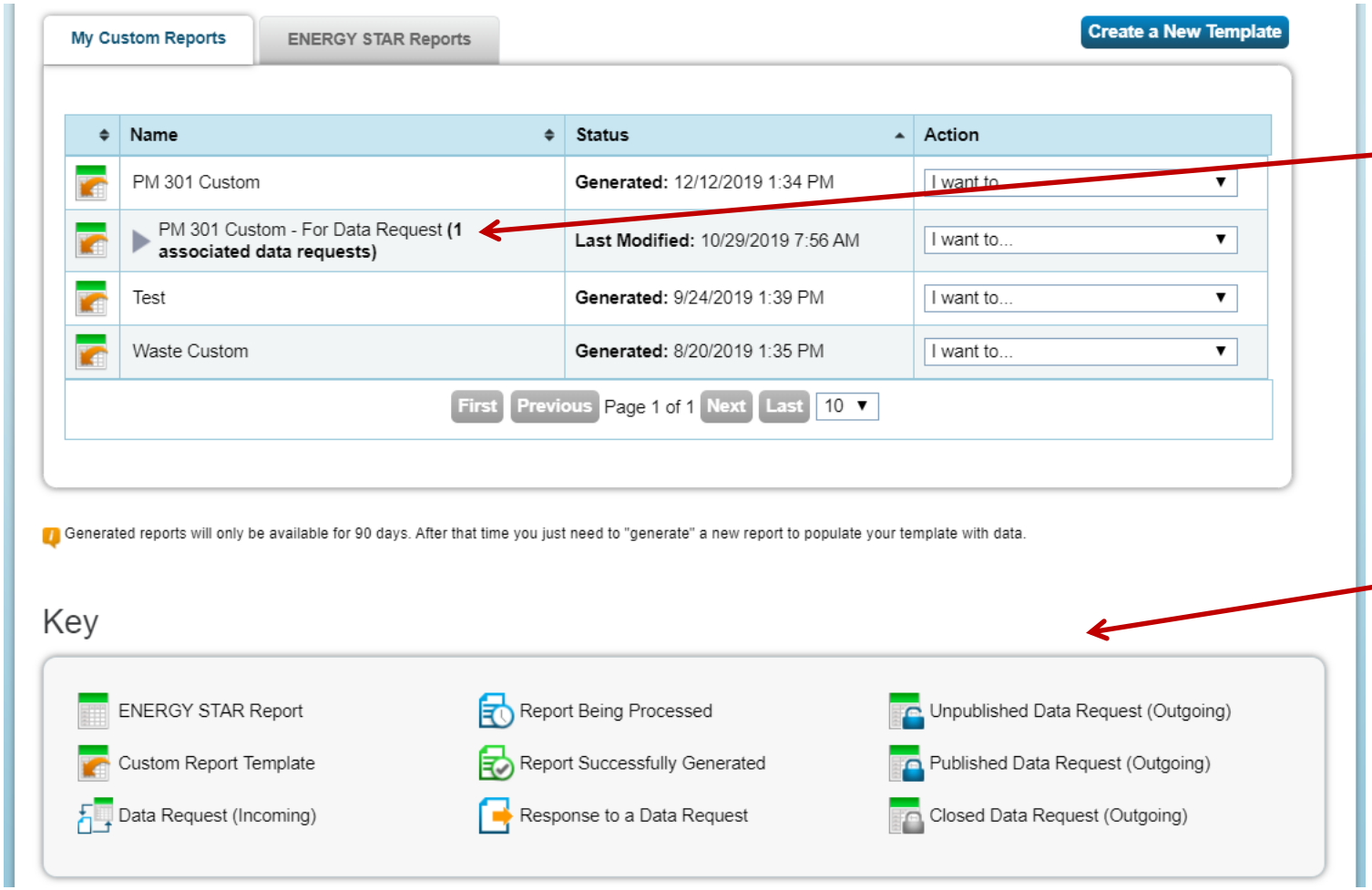
Important Information Called Out in Bold

Key

New Key Explains Report Icons

- ENERGY STAR Report
- Custom Report Template
- Data Request (Incoming)
- Report Being Processed
- Report Successfully Generated
- Response to a Data Request
- Unpublished Data Request (Outgoing)
- Published Data Request (Outgoing)
- Closed Data Request (Outgoing)

Custom Reports



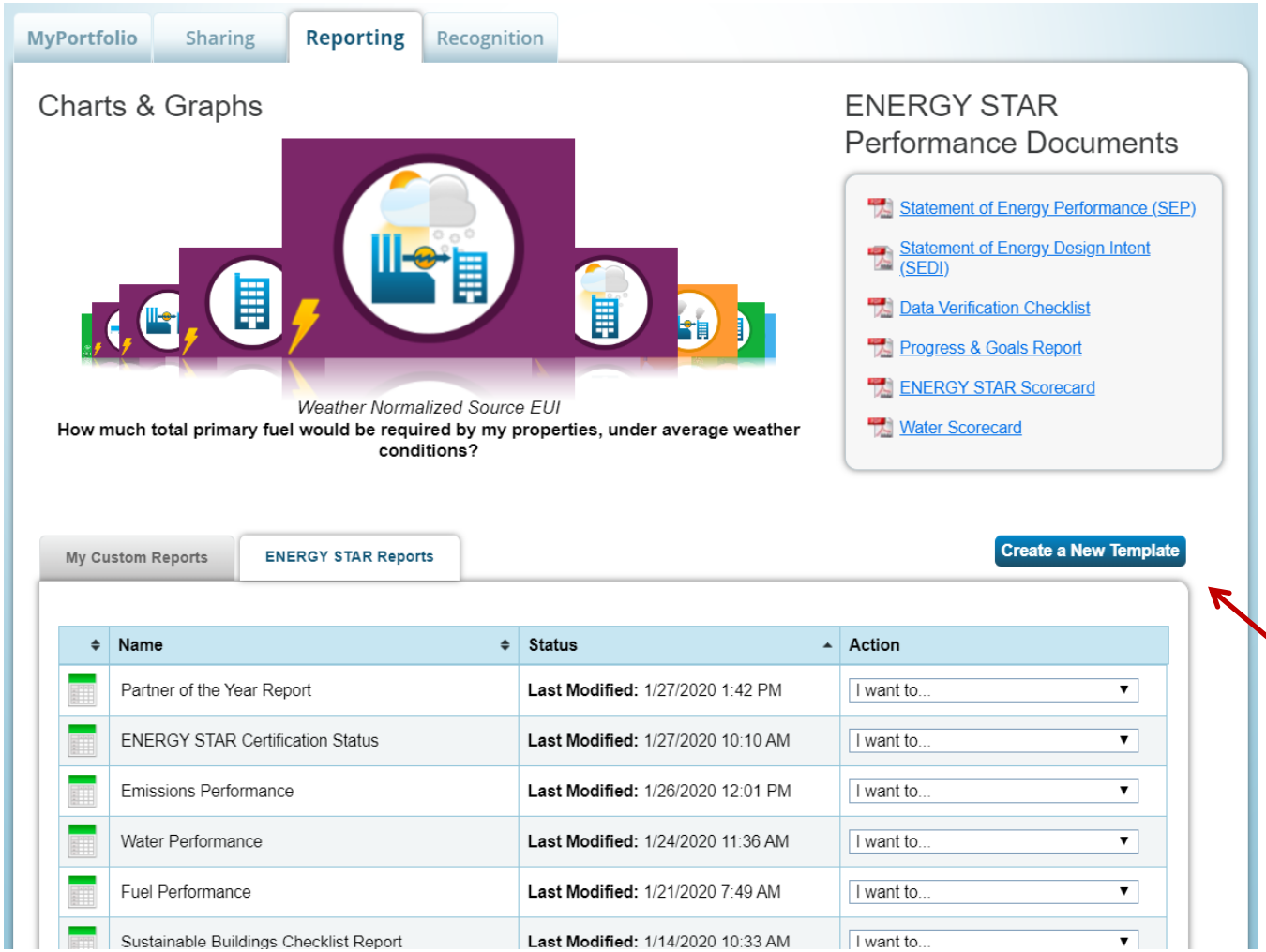
Important Information Called Out in Bold

New Key Explains Report Icons

Custom Reporting

- Create report template
- Use your template to
  - Generate a custom report
  - Share your template
  - Request data from others

Custom Reporting



Generate Custom Report Templates

Custom Templates

ENERGY STAR® PortfolioManager®

Welcome Account Settings | Contacts | Help | Sign Out

MyPortfolio | Sharing | Planning | Reporting | Recognition

Create a Report Template

Report templates provide you with an easy way to regularly access information and metrics. Yo
can also use your custom report template to collect data from other Portfolio Manager users. Y
people who may have similar needs with their properties.

1 Name Your Template

Name: *

Please provide a unique name for this template

2 Select Timeframe of Information to Include

Timeframe: * Current Year

Each property you include must have at least one complete year of data (12 full mont
metrics you select to be able to be calculated. If metrics cannot be calculated, "N/A"
in your report.

3 Select Properties to Include

Properties: * - Select Number of Property(ies) -

4 Select Information & Metrics to Include

Information & Metrics: * Select Information & Metrics Selected Items: 4

Save Template Cancel

Follow Us

Contact Us | Privacy Policy | Browser Requirements | ENERGY STAR Buildings & Plants Website

Select Information & Metrics

Selected items: 4 of 50 maximum (View Selection and Order)

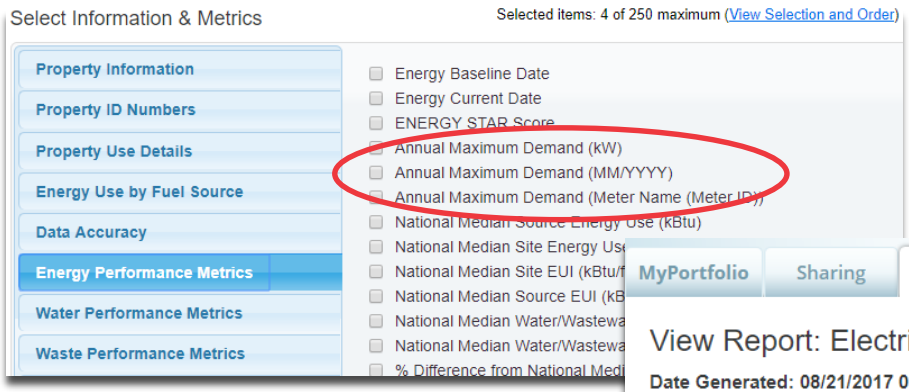
- Property Information
- Property ID Numbers
- Property Use Details
- Energy Use by Fuel Source
- Data Accuracy
- Energy Performance Metrics
- Water Performance Metrics
- Waste Performance Metrics
- Cost Performance Metrics
- Greenhouse Gas Emissions
- Renewable Energy & Green Power
- ENERGY STAR Certification
- Property Design

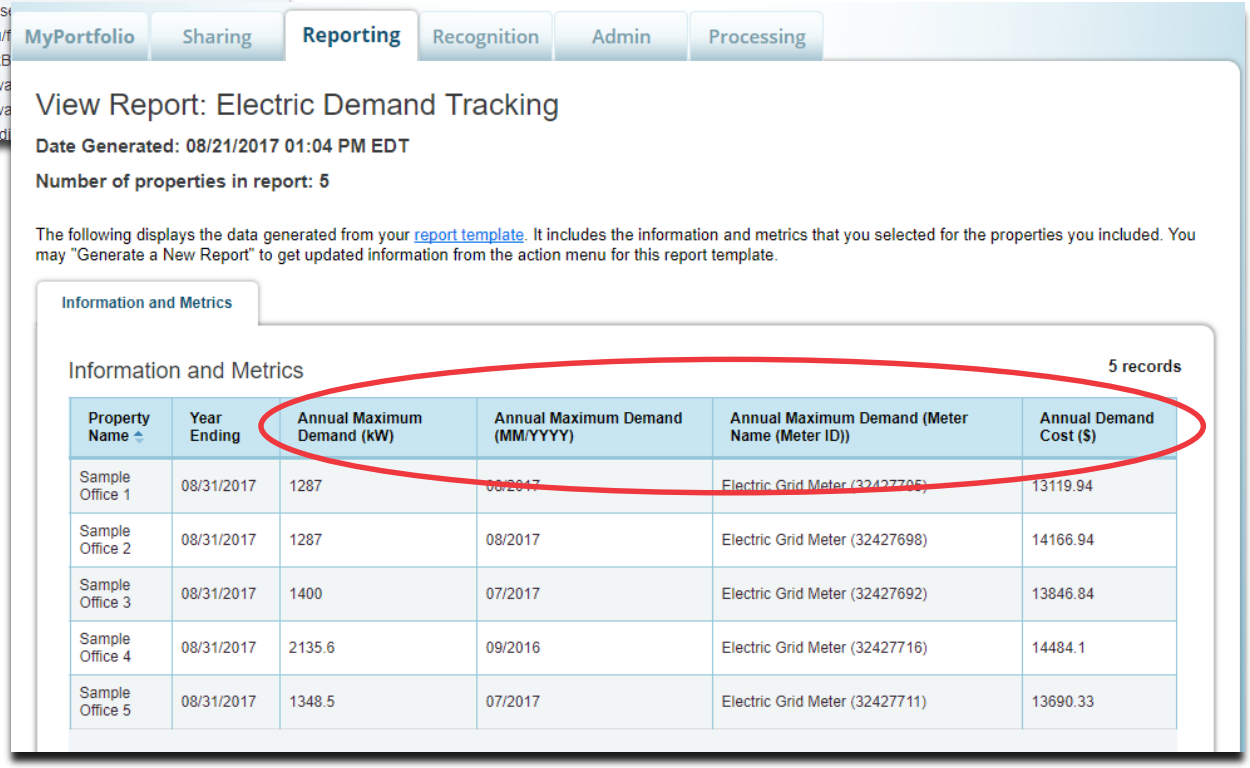
- [x] Property Name
- [x] Parent Property Name
- [ ] Address 1
- [ ] Address 2
- [ ] City
- [ ] County
- [ ] State/Province
- [ ] Postal Code
- [ ] Country
- [ ] Property GFA - Self-Reported (ft²)
- [ ] Property GFA - Calculated (Buildings and Parking) (ft²)
- [ ] Property GFA - Calculated (Buildings) (ft²)
- [ ] Property GFA - Calculated (Parking) (ft²)
- [ ] Primary Property Type - Self Selected
- [ ] Primary Property Type - Portfolio Manager-Calculated
- [ ] National Median Reference Property Type
- [ ] List of All Property Use Types at Property
- [ ] Largest Property Use Type
- [ ] Largest Property Use Type - Gross Floor Area (ft²)
- [ ] 2nd Largest Property Use Type
- [ ] 2nd Largest Property Use - Gross Floor Area (ft²)
- [ ] 3rd Largest Property Use Type

Download Full List of Information & Metrics

Selected items: 4 of 50 maximum (View Selection and Order) Apply Selection Cancel

Electric Demand Metrics also available in custom reports





Property Name	Year Ending	Annual Maximum Demand (kW)	Annual Maximum Demand (MM/YYYY)	Annual Maximum Demand (Meter Name (Meter ID))	Annual Demand Cost ($)
Sample Office 1	08/31/2017	1287	08/2017	Electric Grid Meter (32427795)	13119.94
Sample Office 2	08/31/2017	1287	08/2017	Electric Grid Meter (32427698)	14166.94
Sample Office 3	08/31/2017	1400	07/2017	Electric Grid Meter (32427692)	13846.84
Sample Office 4	08/31/2017	2135.6	09/2016	Electric Grid Meter (32427716)	14484.1
Sample Office 5	08/31/2017	1348.5	07/2017	Electric Grid Meter (32427711)	13690.33

Use Your Template

MyPortfolio | Sharing | **Reporting** | Recognition

Your template has been successfully saved.

In addition to saving your template for future use, you can go ahead and use it right away to:

- Generate a Report – Pull information you have selected from your account and into your template to create a report for download.
- Request Data from Others – Ask other people to fill out your template with information from their accounts.
- Share Template with Others – Give your template to other people so that they can use it to prepare spreadsheets from their accounts.

Keep in Mind: If you have chosen a large number of properties and/or metrics in your template, it may take a little longer to generate your report. Learn more about creating large spreadsheets.

New template appears on "My Custom Reports" tab

My Custom Reports | ENERGY STAR Reports | Create a New Template

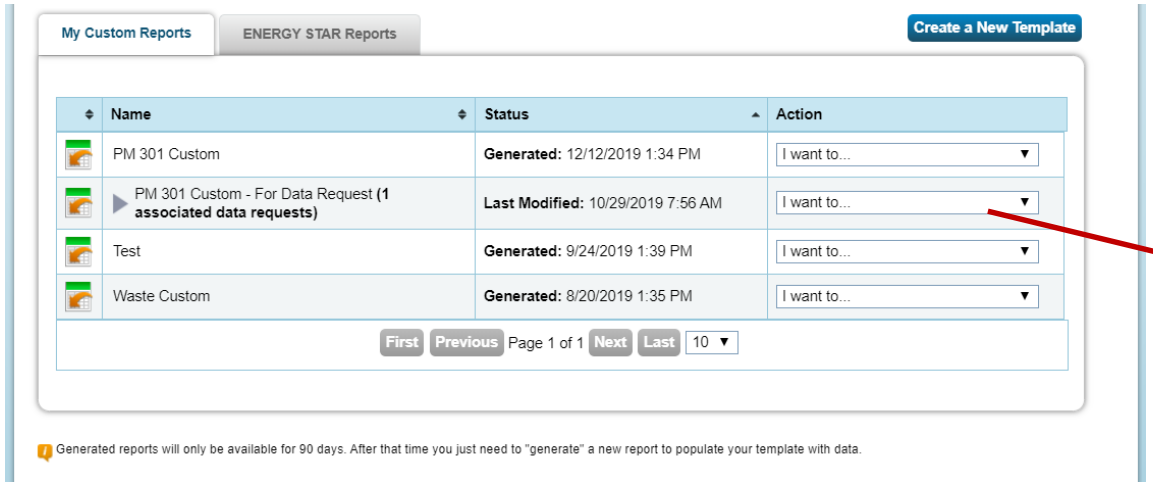
Name	Status	Action
PM 301 Custom	**Generated:** 12/12/2019 1:34 PM	I want to...
PM 301 Custom - For Data Request **(1 associated data requests)**	**Last Modified:** 10/29/2019 7:56 AM	I want to...
Test	**Generated:** 9/24/2019 1:39 PM	I want to...
Waste Custom	**Generated:** 8/20/2019 1:35 PM	I want to...

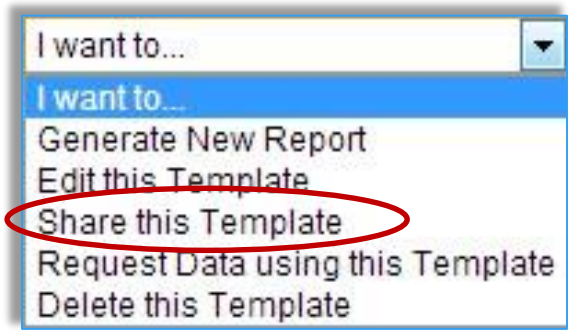
First | Previous | Page 1 of 1 | Next | Last | 10

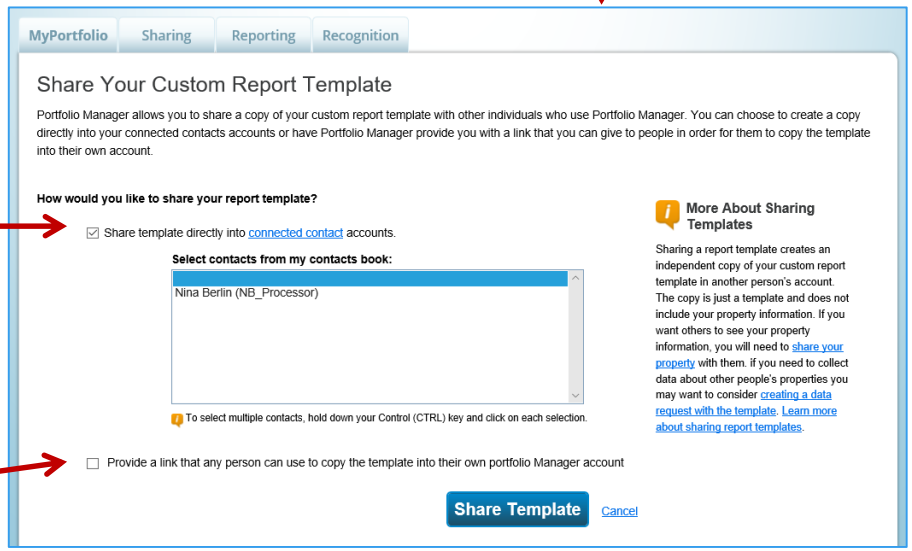
Generated reports will only be available for 90 days. After that time you just need to "generate" a new report to populate your template with data.

Click links or use drop-down menu to share your template with others, request data from other users, or generate a spreadsheet

Share Template



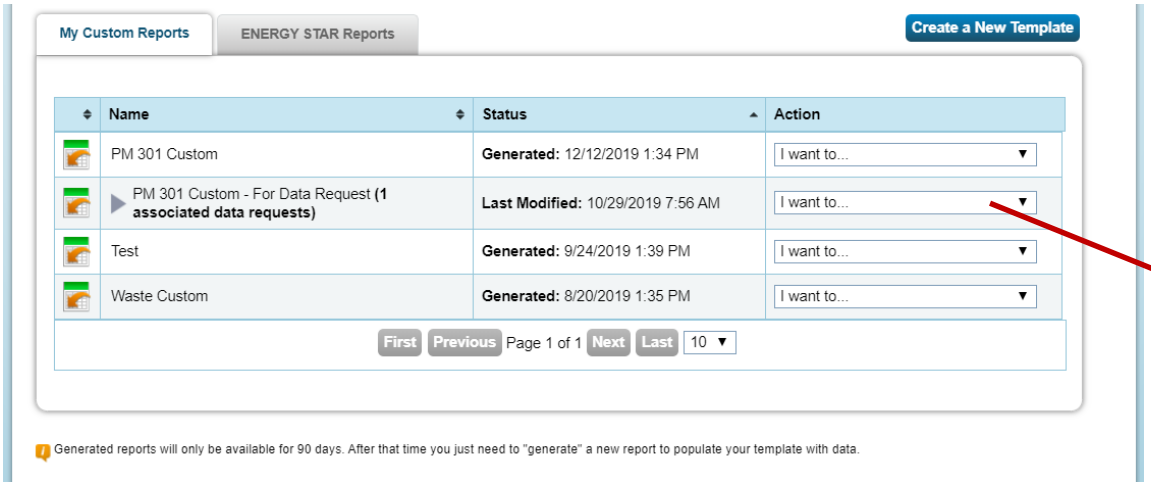


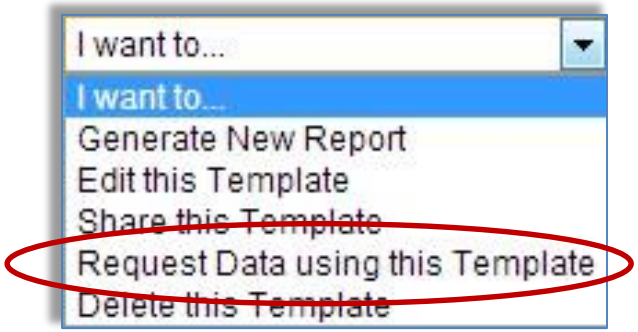


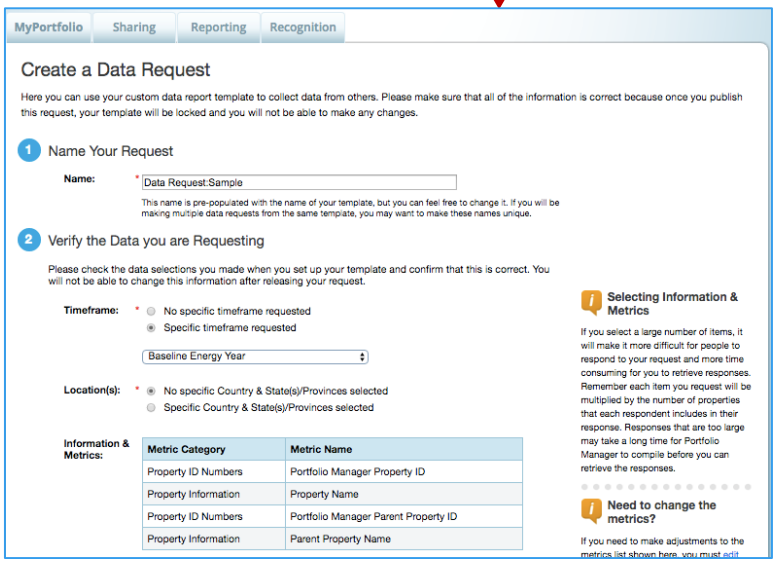
Share with a Contact; or

Generate a link in Portfolio Manager that allows any user to copy the template to their account

Request Data Using Template







Name Your Request

Verify Data

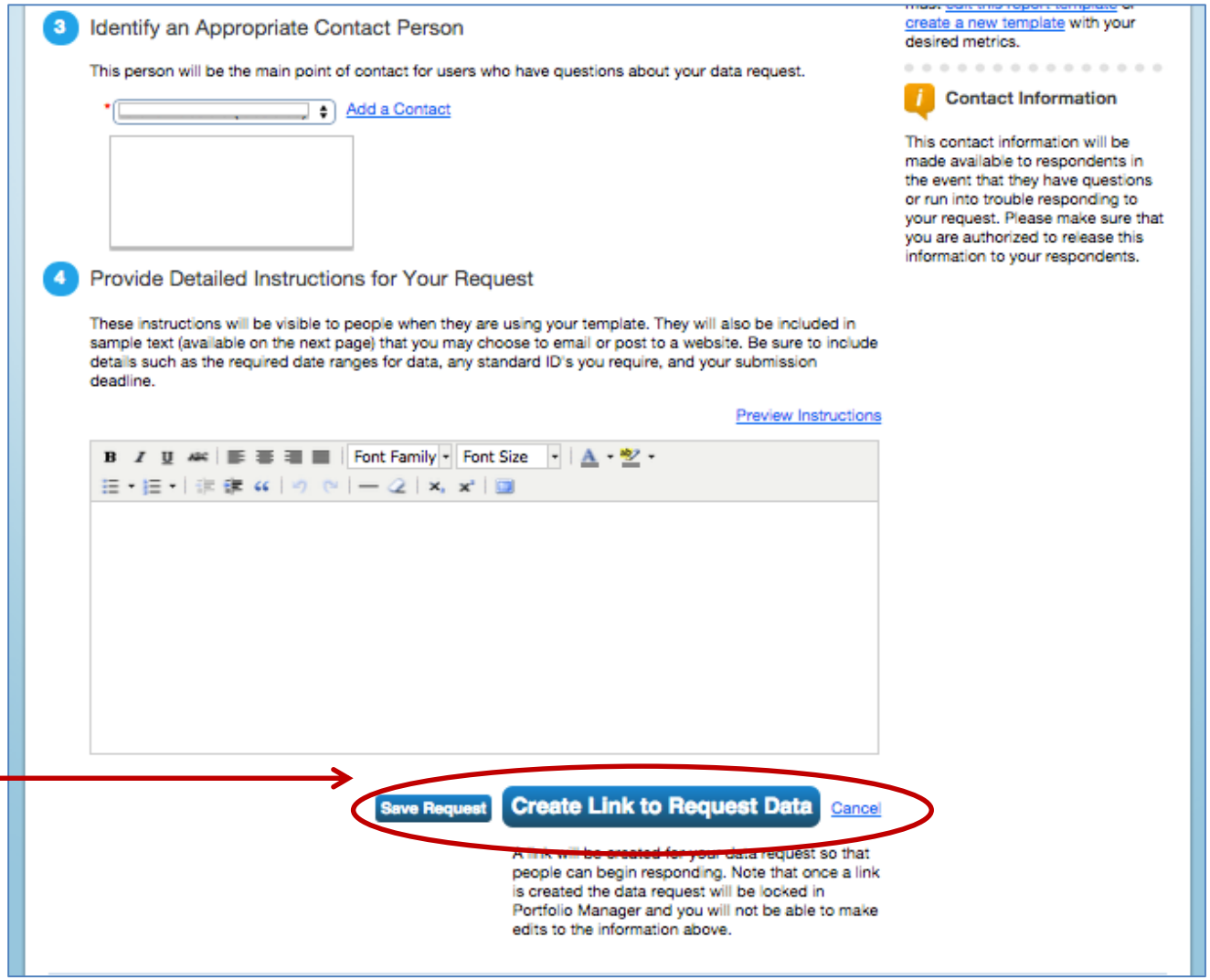
- Timeframe
- Locations
- Info and Metrics

Request Data Using Template

Identify Contact

Provide instructions

"Save" or "Create Link" to request data



Publish Data Request

MyPortfolio | Sharing | Reporting | Recognition

Create a Data Request

Here you can use your custom data report template to collect data from others. Please make sure that all of the information is correct because once you publish this request, your template will be locked and you will not be able to make any changes.

1 Name Your Request

Name: * Data Request:Sample

2 Verify the Data yo

Please check the data s
will not be able to chang

Timeframe: *

Location(s): *
- No specific Country & State(s)/Provinces selected
- Specific Country & State(s)/Provinces selected

Information & Metrics:

Metric Category	Metric Name
Property ID Numbers	Portfolio Manager Property ID
Property Information	Property Name
Property ID Numbers	Portfolio Manager Parent Property ID
Property Information	Parent Property Name

You have chosen to create a unique link for this request to begin collecting data. If you choose to continue, the template will become locked and you will not be able to add or remove information you are requesting. If you wish, you can select "Cancel" and then "Edit this Template" to review the information one last time before publishing. Please make sure that your instructions are ready to be viewed by any user who has been sent this data request. If you would like to view the instructions before continuing, then please click "cancel" and then click "Preview Instructions". Also, keep in mind that after your link is created, the request will become public but you must provide it to your respondents in order for them to respond. Are you sure you want to continue?

Continue | Cancel

electing Information & etrics

lect a large number of items, it e it more difficult for people to to your request and more time ng for you to retrieve responses. Remember each item you request will be multiplied by the number of properties that each respondent includes in their response. Responses that are too large may take a long time for Portfolio Manager to compile before you can retrieve the responses.

Need to change the metrics?

If you need to make adjustments to the metrics list shown here, you must edit

Data Request Created

Specific Instructions for your Respondents

MyPortfolio | Sharing | Reporting | Recognition

Your data request "Data Request:Sample" has been successfully released.

People can now start responding to your data request. Sample text has been provided below (along with your URL) to help you publicize this data request and start gathering responses.

Instructions for Your Respondents

To distribute your data request and collect benchmarking results from other Portfolio Manager users, share the following URL with your respondents. You can do this in any way you like (e.g., email, letter, flyer, posted to a website). Individuals who respond to your data request will be required to follow a few steps before they can use your template to respond to your request. The following text is provided to you so that you can customize it and pass it along to your respondents when sharing the URL.

Owen Gray of The Clark Group, LLC has requested a report of your properties' energy use data. Please respond to this request using EPA's ENERGY STAR Portfolio Manager tool (Learn more about Portfolio Manager). A report template named "Data Request:Sample" has been created for this purpose and is available at the following link.

https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/8575c81d-35d7-4296-94f0-a6e68e60f30c

New to Portfolio Manager?
After you create a Portfolio Manager account, review the Quick Start Guide to learn how to enter your property's energy data. Once you've entered your property information, open the "Data Request:Sample" report template to create and submit your report.

How to Access "Data Request:Sample" report template after you created an account

- To access the data request for the first time, click the link "Data Request:Sample" and then log in to Portfolio Manager as prompted. You will be directed to the Respond to Data Request page.
- Once you have initially accessed the data request by clicking on the external link above, the data request will always appear within your Portfolio Manager account in the Reporting tab and can be accessed at any time in the future by following these steps:
  - Log into your Portfolio Manager account at: www.energystar.gov/buildings
  - Go to the Reporting tab
  - Under Templates and Reports, find "Data Request:Sample"
  - From the Action Menu, select "Respond to Data Request"

Managing Your Data Request

My Custom Reports | ENERGY STAR Reports

Create a New Template

	Name	Status	Action
	PM 301 Custom	**Generated:** 12/12/2019 1:34 PM	I want to...
	PM 301 Custom - For Data Request **(1 associated data requests)**	**Last Modified:** 10/29/2019 7:56 AM	I want to...
	Data Request:PM 301 Custom - For Data Request **(Data Request)**	**Published:** 10/29/2019 11:57 AM	I want to... Edit Instructions View Instructions Download Responses in Excel Download Responses in XML Close Data Request
	Test	**Generated:** 9/24/2019 1:39 PM	
	Waste Custom	**Generated:** 8/20/2019 1:35 PM	

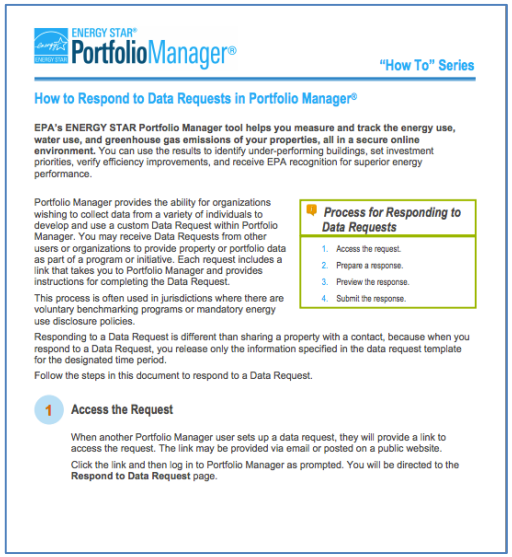
First Previous Page 1 of 1 Next Last 10

Responding to Data Requests

- For more information on responding to data requests, please reference www.energystar.gov/buildings/training for:

- Print resource titled: “How to Respond to Data Requests in Portfolio Manager”

- 5 minute video titled: “How to Respond to a Data Request in Portfolio Manager”



ENERGY STAR® PortfolioManager®

“How To” Series

How to Respond to Data Requests in Portfolio Manager®

EPA’s ENERGY STAR Portfolio Manager tool helps you measure and track the energy use, water use, and greenhouse gas emissions of your properties, 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.

Portfolio Manager provides the ability for organizations wishing to collect data from a variety of individuals to develop and use a custom Data Request within Portfolio Manager. 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.

Process for Responding to Data Requests

1. Access the request.
2. Prepare a response.
3. Preview the response.
4. Submit the response.

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 the steps in this document to respond to a Data Request.

1 Access the Request

When another Portfolio Manager user sets up a data request, they will provide a link to access the request. The link may be provided via email or posted on a public website.

Click the link and then log in to Portfolio Manager as prompted. You will be directed to the **Respond to Data Request** page.

Pop Quiz!

3. True or False: You can only generate reports in Portfolio Manager using the pre-defined templates.
    a. True
    b. False

4. If you need access to specific data points from properties outside your organization, which of the following is the best approach to obtain this information?
    a. Have other Portfolio Managers share their property records with you
    b. Initiate a Portfolio Manager Data Request
    c. Have other Portfolio Managers transfer their property records to you

Pop Quiz!

3. True or False: You can only generate reports in Portfolio Manager using the pre-defined templates.
   a. True
   b. **False**

You can create custom reporting templates on the "Reporting" tab.

4. If you need access to specific data points from properties outside your organization, which of the following is the best approach to obtain this information?
   a. Have other Portfolio Managers share their property records with you
   b. **Initiate a Portfolio Manager Data Request**
   c. Have other Portfolio Managers transfer their property records to you

Sharing and transferring property records will give you, at a minimum, read-access to the entire property. If you only need specific data points or metrics for your reporting, it is best to initiate a Data Request.

How To

- Update data using spreadsheet upload feature
- Set baseline, goals, and targets to plan energy improvements
- Create custom reporting templates
- Use the Sustainable Buildings Checklist

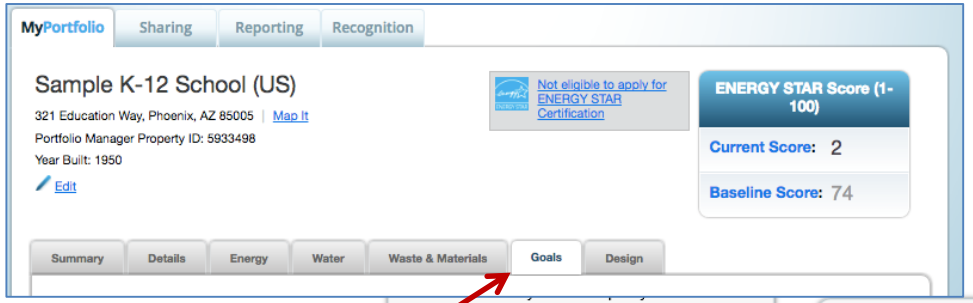
What is the Sustainable Buildings Checklist?

- United States Federal High Performance Sustainable Buildings Checklist (Guiding Principles Checklist) now available to all property types
- Assist owners/managers with evaluating sustainability in existing buildings
- Encouraged for all properties; used by U.S. Federal buildings to comply with requirements

Use the Sustainable Buildings Checklist to:

- *Conduct initial and final building walkthrough assessments*
- *Track and easily view progress on each guiding principle*
- *Upload compliance documents to the repository for record keeping*
- *Create a portfolio-wide sustainability roll-up report*
- *Review up-to-date energy and water metrics generated by Portfolio Manager*

Access the Sustainable Buildings Checklist



Click on the "Goals" tab for a specific property and scroll to the bottom of the page

certifications, such as LEED and Green Globes. This information will automatically be included in your Sustainable Buildings Checklist.

Third Party Certifications

You have not added any third party certifications for this property.

Add or Edit Third Party Certifications

Sustainable Buildings Checklist

Checklist Complete: 4%

Yes 4%
Not Applicable 0%
No 4%
In Process 12%
Not Assessed 81%

Checklist completion percentage includes "Yes" and "Not Applicable" responses.

Sustainable Buildings Checklist

The Sustainable Buildings Checklist evaluates sustainability in existing buildings. It was first developed for US federal building managers to achieve the 2008 Federal Guiding Principles for High Performance Sustainable Buildings. It can also be used for non-government buildings. For guidance in using the 2008 Checklist, see How to Use the Sustainable Buildings Checklist. Updates to this Checklist to reflect the 2016 Guiding Principles are on hold. In the meantime, the 2016 Guiding Principles can be tracked in US federal buildings using this spreadsheet alternative.

Target Date of Compliance: Not Set

Actual Date of Compliance: Not Set

Access the Checklist

Start the Sustainable Buildings Checklist

MyPortfolio | Sharing | Reporting | Recognition

Sustainable Buildings Checklist: Sample K-12 School (US)

The Sustainable Buildings Checklist evaluates sustainability in existing buildings. It was first developed for US federal building managers to achieve the 2008 Federal Guiding Principles for High Performance Sustainable Buildings. It can also be used for non-government buildings. Updates to this Checklist to reflect the 2016 Guiding Principles are on hold. In the meantime, the 2016 Guiding Principles can be tracked in US federal buildings using this spreadsheet alternative.

About this Property

Property Name: Sample K-12 School (US) View Details & IDs

About this Checklist (Last Updated: 07/14/2017)

Estimated Date of ***Sustainable Buildings Checklist*** Compliance:

Actual Date of ***Sustainable Buildings Checklist*** Compliance:

Third Party Certification: None Select a Third Party

Checklist Manager: Select Contact Add Contact

Compliance Documents: 0 files Upload and View Documents on File

Add Note to this Checklist

Checklist Complete: 0%

- Yes 0%
- Not Applicable 0%
- No 0%
- In Process 0%
- Not Assessed 100%

Checklist completion percentage includes "Yes" and "Not Applicable" responses.

Generate & Download A Printable Checklist

This Printable Checklist can be used to show all of your responses to date or to prepare your responses in advance.

Download & Print PDF

Complete Checklist Step by Step

Complete the Sustainable Buildings Checklist

- Employ Integrated Assessment, Operation, and Management Principles
  - Integrated Assessment, Operation, and Management
    - Team
    - Goals
    - Plan
    - Occupant Feedback
  - Commissioning
- Optimize Energy Performance
  - Energy Efficiency
  - Onsite Renewable Energy
  - Measurement and Verification
  - Benchmarking
- Protect and Conserve Water
  - Indoor Water
  - Outdoor Water
  - Storm Water
  - Water Efficient Products
- Enhance Indoor Environmental Quality
  - Ventilation and Thermal Comfort
  - Moisture Control
  - Daylighting and Lighting Controls
  - Low-Emitting Materials
  - Integrated Pest Management
  - Tobacco Smoke Control
- Reduce Environmental Impact of Materials
  - Recycled Content
  - Biobased Content
  - Environmentally Preferable Products
  - Waste and Materials Management
  - Ozone Depleting Compounds

Guiding Principle: Team

Use an integrated team to develop and implement policy regarding sustainable operations and maintenance.

View References & Resources

- ○ Yes
- ○ No
- ○ In Process
- ◉ Not Assessed
- ○ Not Applicable (N/A) - Justification Required

Supporting Documentation

- ☐ Team roster or equivalent
- ☐ Completed "Responsible Team Member" fields
- ☐ Other

Upload and View Documents on File

Responsible Team Member

Team Member: Enter Name

Notes/Comments:

<< Back | Save & Close | Save & Continue >> | Cancel

Pop Quiz!

5. True or False: Using the Sustainable Buildings Checklist in Portfolio Manager is not required in order to obtain ENERGY STAR Certification for a property.
    a. True
    b. False

Pop Quiz!

5. True or False: Using the Sustainable Buildings Checklist in Portfolio Manager is not required in order to obtain ENERGY STAR Certification for a property.
   a. **True**
   b. False

You **do not** need to use the Sustainable Buildings Checklist to obtain ENERGY STAR Certification. However, it can be a valuable tool to evaluate your building's sustainability.

Recap

- In this training, we learned how to:
  - Update data using the spreadsheet upload feature
  - Set baseline, goals, and targets to plan energy improvements
  - Create custom reporting templates
  - Use the Sustainable Buildings Checklist

Extra Help

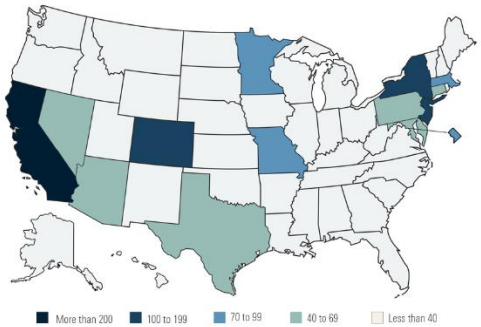
- Visit: http://www.energystar.gov/buildingshelp
- Additional Portfolio Manager training resources available at: www.energystar.gov/buildings/training
  - Step-by-step documents (PDF)
  - Recorded webinars and short training videos
- Register for regular webinars at: http://esbuildings.webex.com
- Portfolio Manager Technical Reference Series: http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_model_tech_desc

www.energystar.gov/RenewablesReport

Where is onsite renewable energy commonly found?

California, Colorado, New York, and New Jersey had the most properties using onsite renewable energy in our data set, while Nevada has the highest percent of properties using onsite renewable energy. In addition to population density, this could be caused by several factors, such as supportive state-level policies and differences in building density or type among states represented in the data.

Number of properties with onsite renewable energy systems by state

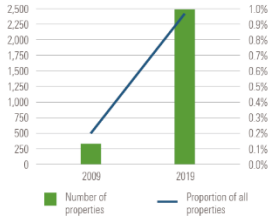


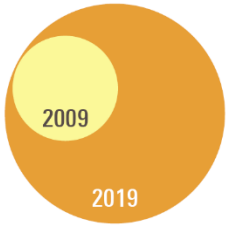
State*	# of properties	% of all those bench-marking in that state
California	981	2.0%
Colorado	164	2.1%
New York	151	0.4%
New Jersey	122	2.8%
Minnesota	97	1.3%
Massachusetts	83	1.1%
Missouri	78	2.0%
Washington, DC	73	2.7%
Nevada	64	3.2%
Connecticut	58	1.8%
Texas	52	0.3%
Maryland	49	1.0%
Arizona	49	1.2%
Pennsylvania	40	0.5%

*Does not include the full list of states represented in the data set

How has the use of onsite renewables changed over the past decade?

Within Portfolio Manager, the number of properties reporting onsite generation of renewable energy has increased nearly ten-fold (although still only accounting for 1% of all properties), and onsite renewables are supplying more than six times as much energy as they did in 2009. This may suggest a trend towards smaller onsite systems over the past decade, as decreases in technology costs have increased accessibility to smaller projects.





HOSPITALS
0% had onsite RE in 2009
1.14% have onsite RE in 2019

WORSHIP FACILITIES
0.16% had onsite RE in 2009
2.4% have onsite RE in 2019

ENTERTAINMENT/ASSEMBLY
0.11% had onsite RE in 2009
1.01% have onsite RE in 2019

K-12 SCHOOLS
0.21% had onsite RE in 2009
2.4% have onsite RE in 2019

The number of properties reporting onsite renewable energy has increased nearly ten-fold in the past decade (264 to 2,447). They now make up nearly 1% of all properties benchmarking in Portfolio Manager, whereas ten years ago they only made up two-tenths of one percent.

Onsite renewables are supplying more than six times more of the site energy for properties benchmarking in Portfolio Manager as compared to a decade ago.

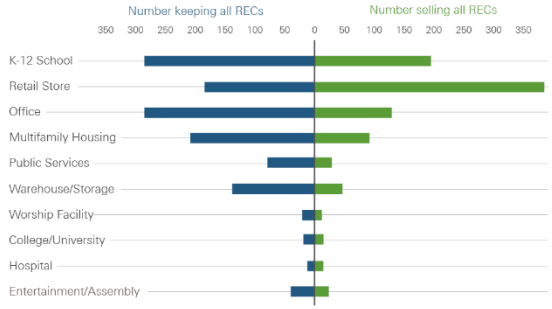
We see the highest proportional growth among hospitals, worship facilities, entertainment/assembly buildings, and K-12 schools.

What are buildings doing with their renewable energy certificates (RECs)?

Among all buildings in the data set, 60% retained all the environmental claims (or RECs) associated with their renewable systems' electricity production, although practices vary across building types. Retail stores and warehouses both tend to have large roof spaces, and yet even they exhibit divergent practices.

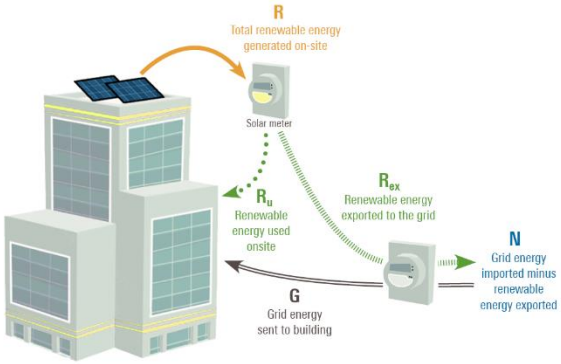
What is a renewable energy certificate?
A renewable energy certificate, or REC, is a market-based instrument that represents the property rights to the environmental, social and other non-power attributes of renewable electricity generation. RECs are issued when one megawatt-hour (MWh) of electricity is generated and delivered to the electricity grid from a renewable energy resource.

Handling of RECs by Building Type



Understanding energy flows

The diagram below shows how energy moves between an onsite renewable energy system and the grid. Insight into these flows is critical to understanding a building's energy performance, but several of them are often not reported to the customer.



R: **Total amount of renewable energy generated onsite**
Properties with onsite renewables should have access to this quantity

R_{ex}: **Renewable energy generated onsite, exported back to grid**
Availability depends on metering (utility meter or owner submeter)

R_U: **Renewable energy generated onsite, used onsite**
Can be calculated as $R - R_{ex}$.

G: **Grid energy sent to building**
Availability depends on metering (utility meter or owner submeter)

N: **Net consumption of grid energy, accounting for exports**
Shows what a customer owes on utility bills. Equal to $G - R_{ex}$.

Total site energy required to operate the building: Equal to Ru + G *or* N + R.

Total source energy required to operate the building: Must be calculated as Ru + G.

www.energystar.gov/RenewablesReport

Thank you for attending!

Questions?

Slides will be sent to all webinar registrants after today's session

If you have any questions on Portfolio Manager
or the ENERGY STAR program, contact us at:
www.energystar.gov/BuildingsHelp