

Configure ENERGY STAR® Portfolio Manager® account to submit data with EnergyCAP UtilityManagement

Instructions for Using ENERGY STAR Portfolio Manager and
EnergyCAP UtilityManagement™

Overview

This document is a guide for configuring Portfolio Manager and allows the sending of utility bill data from UtilityManagement.

ENERGY STAR® Portfolio Manager (PM) is an online service created by the Environmental Protection Agency (EPA). It allows you to track the energy consumption of your facilities and compare them to similar buildings nationwide. UtilityManagement makes it easier to use PM by uploading your consumption data (bills) from UtilityManagement to your PM account.

This guide will help you:

- Register for a Portfolio Manager (PM) account
- Create a profile for your property (building)
- Add meters to your property
- Provide UtilityManagement with access to your PM account
- Link your PM account to UtilityManagement to begin submitting data

For more data regarding the Portfolio Manager tool, reference the EPA's [ENERGY STAR Quick Start Guide](#).

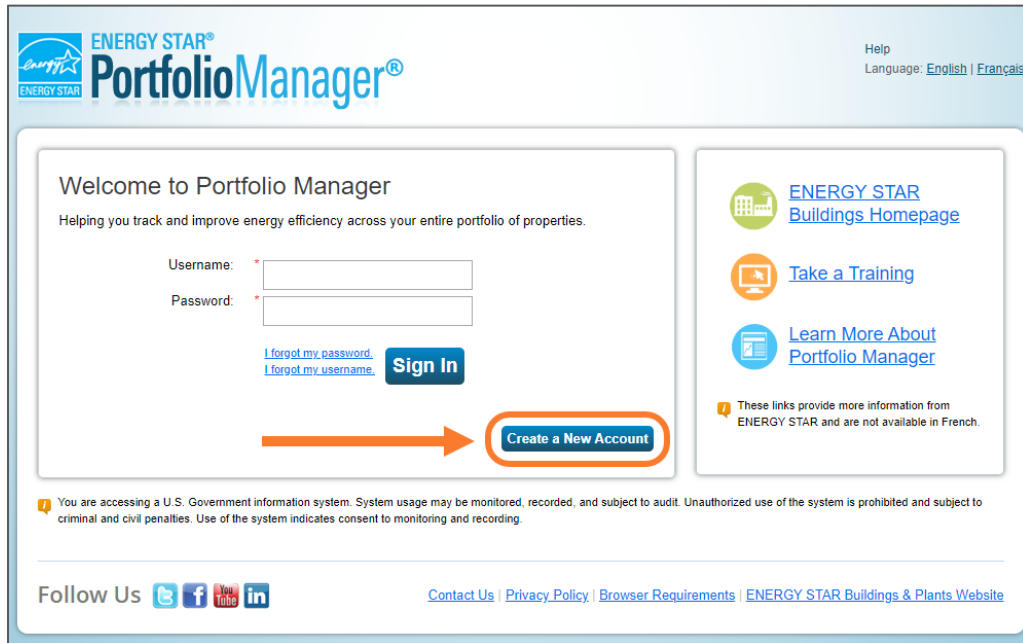
NOTE: This content is NOT for UtilityManagement clients who have already been using UtilityManagement Version 3 to submit data to ENERGY STAR. UtilityManagement already has access to the PM account and properties used by UtilityManagement Version 3. This only applies to **new** UtilityManagement clients, clients who wish to transition to a new PM account, and existing clients who want to link more properties between PM and UtilityManagement (more properties than were used with UtilityManagement Version 3).

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Section 1 | Register for a Portfolio Manager Account

- 1.1. Go to the ENERGY STAR Portfolio Manager (PM) login page (<https://portfoliomanager.energystar.gov/pm/login.html>) and select **Create a New Account**.



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PortfolioManager®

Help
Language: [English](#) | [Français](#)

Welcome to Portfolio Manager
Helping you track and improve energy efficiency across your entire portfolio of properties.

Username:

Password:

[I forgot my password.](#)
[I forgot my username.](#) **Sign In**

Create a New Account

ENERGY STAR Buildings Homepage

Take a Training

Learn More About Portfolio Manager

These links provide more information from ENERGY STAR and are not available in French.

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- 1.2. Fill out the required information (fields marked with a red asterisk) and select **Create My Account**.

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Help | Login
Language: English | Français

Already have an account? [Sign In Here](#)

Create an Account

Accessing Your Account

Username: *

Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as ~, !, @, etc.).

Confirm Password: *

Selecting a Username

You cannot change your username, so choose wisely. For organizations with multiple properties, we recommend you create a "corporate" account which "owns" all of the properties and have an administrator share properties with employees' individual accounts as necessary.

.....

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: * Select Country

Language: English

Reporting Units: ☒ Conventional EPA Units (e.g., kBtu/ft²) ☐ Metric Units (e.g., GJ/m²)

Street Address: *

City/Municipality: *

State/Province: * ... Select ...

Postal Code: *

First & Last Name for Organizations

If you are creating a corporate account, you can enter your organization's name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

.....

About Your Organization

Organization Name: *

Primary Business or Service: * Select Primary Business or Service

Is your organization an ENERGY STAR Partner? ☐ Yes ☒ No

Primary Business or Service

If you have more than one "primary business," just pick the best option. Portfolio Manager will determine your category for a score based on the information, like square footage, that you enter for each of your property uses.

.....

Do you want your Account Name to be searchable by other Portfolio Manager users?

☒ Yes ☐ No

Do you want your Account Name to be searchable by other Portfolio Manager users? You must select "Yes" if you want to connect with other users to allow automatic upload of utility data or to share properties.

Connecting with Others in Portfolio Manager

You can connect with other people in Portfolio Manager to easily share information. Your account must be searchable in order for others to send you a connection request.

Confirm Your Identity

Please confirm that you are a human

☐ I'm not a robot

hCAPTCHA Privacy - Terms

Create My Account Cancel

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NOTE: You must select **Yes** for the **Do you want your Account Name to be searchable by other Portfolio Manager users?** option to connect your PM account with EnergyCAP.

- 1.3. Check your email for instructions to activate your PM account. You must activate your account before you can log into PM.

- 1.4. On the login page, enter your Username and Password and select **Sign In**. You will land on the **MyPortfolio** tab. This page displays a summary of your properties.

The screenshot shows the ENERGY STAR Portfolio Manager login interface. At the top left is the ENERGY STAR logo. To its right is the text "ENERGY STAR® PortfolioManager®". In the top right corner, there is a "Help" link and a language selector showing "English" and "Français". The main content area is divided into two columns. The left column is titled "Welcome to Portfolio Manager" and includes the subtitle "Helping you track and improve energy efficiency across your entire portfolio of properties." Below this is a login form with "Username:" and "Password:" labels, each followed by a text input field. There are links for "I forgot my password." and "I forgot my username." below the password field. A blue "Sign In" button is to the right of the password field. Below the login form is a "Create a New Account" button. The right column contains three links with icons: "ENERGY STAR Buildings Homepage" (green building icon), "Take a Training" (orange monitor icon), and "Learn More About Portfolio Manager" (blue document icon). Below these links is a note: "These links provide more information from ENERGY STAR and are not available in French." At the bottom of the page, there is a disclaimer: "You are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and subject to criminal and civil penalties. Use of the system indicates consent to monitoring and recording." Below the disclaimer are social media links "Follow Us" with icons for Twitter, Facebook, YouTube, and LinkedIn. At the bottom right are links for "Contact Us", "Privacy Policy", "Browser Requirements", and "ENERGY STAR Buildings & Plants Website".

ENERGY STAR® PortfolioManager®

Help
Language: English | Français

Welcome to Portfolio Manager
Helping you track and improve energy efficiency across your entire portfolio of properties.

Username:

Password:

[I forgot my password.](#)
[I forgot my username.](#) **Sign In**

Create a New Account

[ENERGY STAR Buildings Homepage](#)

[Take a Training](#)

[Learn More About Portfolio Manager](#)

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Section 2 | Create a Property File

To benchmark your facility, create a profile with basic property information, how it is used, and add associated energy meters (or let UtilityManagement create the meters later).

- 2.1. Add a property by clicking **Add a Property** on the **My Portfolio** tab. You can also update multiple properties by using **Upload and/or update multiple properties** link.

The screenshot shows the ENERGY STAR PortfolioManager interface. The top navigation bar includes the ENERGY STAR logo, the title 'PortfolioManager', and user links: 'Welcome Hanlon: Account | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out'. The 'MyPortfolio' tab is selected, with sub-tabs for 'Sharing', 'Reporting', and 'Recognition'. On the left, under 'Properties (1)', the 'Add a Property' button is highlighted with a red box and an arrow. Below this is a 'Refresh to see Source EUI Trend' section with a 'Change Metric' link and a line graph for the years 2009 to 2019. The main 'Dashboard' section on the right includes a search bar, a 'Please refresh to see your current metrics' message, and a 'Refresh Metrics' button. Below this is a table with columns: 'Name', 'Energy Current Date', 'ENERGY STAR Score', 'Site EUI (kBtu/ft²)', and 'Source EUI (kBtu/ft²)'. The table contains one entry: 'Skate O Rama 10393853'. At the bottom of the dashboard is a pagination bar showing 'Page 1 of 1' and 'View 1 - 1 of 1'. On the left, under 'Manage Portfolio', the 'Upload and/or update multiple properties' link is highlighted with a red box and an arrow. Other links in this section include 'Transfer ownership of a property that you manage to another Portfolio Manager user.', 'Download your entire portfolio to Excel or create a custom download.', 'Set a portfolio baseline and/or target to help measure progress.', and 'Add sample properties to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.'

- 2.2. Enter the property's primary function, number of buildings, and construction status. To finish, select **Get Started!**

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

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
☐ 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.

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](#).


Get Started! [Cancel](#)

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Only certain Property Types are eligible for ENERGY STAR scores. Refer to the EPA's documentation for more information regarding Property Types and their associated settings.

2.3. Enter the property's name, address, and other general information and select **Continue**.

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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:

County:

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: %

Property Photo (optional): No file chosen
Select an image file on your computer with the format type of .jpg, .jpeg, .png or .gif; photos will be resized to fit a space of 2.78 inches wide x 2 inches tall.

 **Tip**

The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

 **Tip**

The property photo that you upload here can be used on the [Registry of ENERGY STAR Qualified Buildings](#) if you submit the photo with your application for ENERGY STAR certification. Once a photo has been approved with an application, it cannot be changed until the next time that the property receives ENERGY STAR certification.

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 ([that are eligible for a Retail score](#))


☐ My property has one or more restaurants/cafeterias

☐ My property has a trading floor



[Cancel](#)

- 2.4. Enter specific information on how your building is used. The fields required will depend on the selection made in 2.2. for the building's **Property Type**.



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Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

Basic Information

Name:	Bank	Country:	US
Property Type:	Financial Office	Address:	230 madison street State College, PA 16801 Map It
Year Built:	2018		
Property consists of:	1 building		

Edit

Add Another Type of Use

Add

▼ Building Use [Edit Name](#)

Financial Office refers to buildings used for financial services such as bank headquarters and securities and brokerage firms.





Gross Floor Area should include all space within the building(s) including offices, trading floors, conference rooms and auditoriums, vaults, kitchens used by staff, lobbies, atriums, fitness areas for staff, storage areas, stairways, and elevator shafts.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	<input type="text" value="12,000"/> <input type="text" value="Sq. Ft."/> ▼	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>

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

Back

Add Property [Cancel](#)

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For example, if you indicated your building's Property Type is Office, you are asked to supply different details than if you indicated that your building is a Dormitory.

Some attributes, like Gross Floor Area, are always required.

Some Property Types give you the option to **Use Default Value** (which inserts the national average for that attribute) or **Temporary Value** (which is your estimated value for that attribute) until you can collect and enter actual data for your facility. You can rename the Building Use at any time.

9

TIP: To get detailed descriptions of each space and its space attributes, search in PM for Property Types. One of the options returned in the search is a Property Types, Definitions and Use Details pdf.

Adding Another Type of Use

Portfolio Manager uses the term **Type of Use** to characterize the various spaces within a building. Your building may have one or more property types. For example, an office building might have occupied office space, a computer data center, and parking.

Each of these should be entered as a separate **Type of Use** and will require different information.

If more than 10% of a building's gross floor area is vacant, the vacant square footage should be described as a distinct space type.

- 2.5. To add another space to your facility, select **Add Another Type of Use** from the dropdown and select the type of space you would like to add. Remember to update the Gross Floor Area for each use type.

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Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

[Basic Information](#)

Name:	Bank	Country:	US
Property Type:	Financial Office	Address:	230 madison street State College, PA 16801 Map It
Year Built:	2018		
Property consists of:	1 building		

[Edit](#)

Building Use [Edit Name](#)

Financial Office refers to buildings used for financial services such as bank headquarters and branches.

Gross Floor Area should include all space within the building(s) including offices, trading floors, lobbies, atriums, fitness areas for staff, storage areas, stairways, and elevator shafts.

Property Use Detail	Value
★ Gross Floor Area	12,000
★ Weekly Operating Hours	
★ Number of Workers on Main Shift	
★ Number of Computers	

Add Another Type of Use

- Add Another Type of Use
- Banking/Financial Services
 - Bank Branch
 - Financial Office
- Education
 - Adult Education
 - College/University
 - K-12 School
 - Pre-school/Daycare
 - Vocational School
 - Other
- Entertainment/Public Assembly
 - Convention Center
 - Movie Theater
 - Museum
 - Performing Arts
 - Recreation
 - Social/Meeting Hall
 - Stadium
 - Other

[Add](#)

- 2.6. Continue adding **Use Types** until your building's gross floor area is completely entered. To finalize your entry, click **Add Property**.

▼ Building Use

Edit Name

Financial Office refers to buildings used for financial services such as bank headquarters and securities and brokerage firms.

Gross Floor Area should include all space within the building(s) including offices, trading floors, conference rooms and auditoriums, vaults, kitchens used by staff, lobbies, atriums, fitness areas for staff, storage areas, stairways, and elevator shafts.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	<input type="text" value="12,000"/> Sq. Ft. ▼	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2018"/>	<input type="checkbox"/>

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

Back

Add Property

Cancel

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- 2.7. After saving your entry, you will see a green banner at the top of the Summary tab confirming the property creation. The next step is to create the building's energy meters. Or you can have UtilityManagement automatically create your meters later.

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Settings | Contacts | Help | Sign Out

MyPortfolio

Sharing

Reporting

Recognition

Congratulations! You have successfully created your property.

Next, you can:

- [Add energy use information](#), so that you can see your energy performance metrics.

(Optional) Configure Energy Meters

- 2.8. UtilityManagement can automatically create meters for you later or you can create them now. To add a meter, you can either click the link in the green banner for **Add energy use information** or click on the Energy tab and **Add a Meter**.

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top, the header includes the ENERGY STAR logo, the text "PortfolioManager®", and a user welcome message "Welcome Hanlon:" with links for "Account", "Notifications", "ENERGY STAR Notifications", "Contacts", "Help", and "Sign Out". Below the header, a navigation bar contains "MyPortfolio", "Sharing", "Reporting", and "Recognition". A green banner with a white border contains the text "Congratulations! You have successfully created your property." followed by "Next, you can:" and a bulleted list item "Add energy use information," which is highlighted with an orange rectangle. Below the banner, the "Bank" section shows property details: "230 madison street, State College, PA 16801", "Portfolio Manager Property ID: 10517248", and "Year Built: 2018". To the right, a "Weather Normalized Source EUI (kBtu/ft²)" box shows "Current: N/A" and "Baseline: N/A". A "Change Metric" link is also present. Below the property details, a tabbed interface shows "Summary", "Details", "Energy", "Water", "Waste & Materials", "Goals", and "Design". The "Energy" tab is active, showing a "Meter Summary" section with "0 Energy Meters Total" and "In order to receive metrics for your". To the right of this, it says "Meters - Used to Compute Metrics (0)" with a link "View as a Diagram". An orange arrow points from this text to a blue button labeled "Add A Meter", which is also highlighted with an orange rectangle.

- 2.9. On the setup screen, select the sources of your property's energy. Meters for multiple commodities can be created at the same time.

The screenshot shows the 'Get Started Setting Up Meters for Bank' page in the ENERGY STAR Portfolio Manager. The page has a blue header with the ENERGY STAR logo and 'PortfolioManager' text. Navigation links include 'Welcome Hanlon: Account | Notifications 0 | ENERGY STAR Notifications | Contacts | Help | Sign Out'. The main content area is titled 'Get Started Setting Up Meters for Bank' and includes a paragraph explaining four ways to enter meter data. Below this is a section titled 'Sources of Your Property's Energy' with a lightning bolt icon. It asks 'What kind of energy do you want to track? Please select all that apply.' and lists various energy sources with checkboxes. 'Electric' and 'Natural Gas' are checked. Under 'Natural Gas', there is a 'How Many Meters?' input field with the value '1'. Other energy sources listed include 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), and Other. To the right of the main form are two informational boxes: 'Tracking Energy' and 'Two Meters Needed for Onsite Solar/Wind'. At the bottom right of the main form is a blue 'Get Started!' button and a 'Cancel' link.

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Get Started Setting Up Meters for Bank

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
 - ☐ purchased from the grid
 - ☐ generated onsite with my own solar panels
 - ☐ generated onsite with my own wind turbines
- ☒ Natural Gas
 - How Many Meters?
- ☐ 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:

Get Started! [Cancel](#)

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.](#)

- 2.10. As you select different fuels, additional fields will appear. After you have filled out the required information, select **Get Started**.

Note: You may track your property's water use, but it is not required to benchmark your property and will not factor into your benchmark score.

- 2.11. Click in the table cells to activate the menus. Enter the **Units**, **Date Meter became Active**, and update the **Meter Name** if needed. When you are finished select **Create Meters**.

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About Your Meters for Bank

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 Bank (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 Met	Electric - Grid		<div><div></div><div>GJ kBtu (thousand Btu) kWh (thousand Watt-hours) MBtu/MMBtu (million Btu) MWh (million Watt-hours)</div></div>		<input checked="" type="checkbox"/>		<input type="checkbox"/>	

[Delete Selected Entries](#)
[Add Another Entry](#)

[Back](#) [Create Meters](#) [Cancel](#)

TIP: If you have several meters, it may be helpful to use the meter serial number or other meaningful descriptor as the Meter Name. Consider using the same names in PM and UtilityManagement—this will make mapping meters between the two systems easier.

For UtilityManagement to submit use data to ENERGY STAR, you must use the following units on meters in Portfolio Manager.

If your existing PM meters are not using these units, they must be updated to match the units specified in this table. UtilityManagement will automatically convert the units from your UtilityManagement bills to the units PM meters.

UtilityManagement Commodity	Portfolio Manager Commodities that can be Mapped to UtilityManagement Commodity	Unit for Meters in Portfolio Manager (names are exact based on PM formatting)
Chilled Water	District Chilled Water - Absorption Chiller using Natural Gas	ton hours
	District Chilled Water - Electric-Driven Chiller	
	District Chilled Water - Engine-Driven Chiller using Natural Gas	
	District Chilled Water - Other	
Coal	Coal Anthracite	Tons
	Coal Bituminous	
Diesel Fuel	Diesel	Gallons (US)
Electric	Electric - Grid	kWh (thousand Watt-hours)
Hot Water	District Hot Water	MBtu (million Btu)
Irrigation	Potable Indoor	kGal (thousand gallons) (US)
	Potable Outdoor	
	Potable: Mixed Indoor/Outdoor	
	Reclaimed Indoor	
	Reclaimed Outdoor	
	Reclaimed: Mixed Indoor/Outdoor	
	Well Water Indoor	
	Well Water Outdoor	
	Well Water: Mixed Indoor/Outdoor	
Kerosene	Kerosene	Gallons (US)
Lighting	Electric - Grid	kWh (thousand Watt-hours)
Natural Gas	Natural Gas	therms
Oil #2	Fuel Oil (No. 2)	Gallons (US)
Oil #4	Fuel Oil (No. 4)	Gallons (US)
Oil #6	Fuel Oil (No. 5 and No. 6)	Gallons (US)
Plant Flow	Average Influent Flow	Million Gallons per Day
Propane	Propane	Gallons (US)
Sewer	Other - Indoor	kGal (thousand gallons) (US)
	NOTE: ENERGY STAR does not recommend tracking sewer meters	
Solar PV	Electric - Solar	kWh (thousand Watt-hours)
Steam	District Steam	kLbs (thousand pounds)

UtilityManagement Commodity	Portfolio Manager Commodities that can be Mapped to UtilityManagement Commodity	Unit for Meters in Portfolio Manager (names are exact based on PM formatting)
Storm Drainage	Other - Outdoor NOTE: ENERGY STAR does not recommend tracking storm drain meters	Gallons (US)
Water	Potable Indoor	kGal (thousand gallons) (US)
	Potable Outdoor	
	Potable: Mixed Indoor/Outdoor	
	Reclaimed Indoor	
	Reclaimed Outdoor	
	Reclaimed: Mixed Indoor/Outdoor	
	Well Water Indoor	
	Well Water Outdoor	
	Well Water: Mixed Indoor/Outdoor	
Water & Sewer	Potable Indoor	kGal (thousand gallons) (US)
	Potable Outdoor	
	Potable: Mixed Indoor/Outdoor	
	Reclaimed Indoor	
	Reclaimed Outdoor	
	Reclaimed: Mixed Indoor/Outdoor	
	Well Water Indoor	
	Well Water Outdoor	
	Well Water: Mixed Indoor/Outdoor	
	Other - Indoor	
	Other - Outdoor	
	Other - Mixed Indoor/Outdoor (Water)	
Wind	Electric - Wind	kWh (thousand Watt-hours)
Wood	Wood	Tons

2.12. After your meters are configured, select **Continue**.

ENERGY STAR® PortfolioManager®

Welcome Hanlon: Account | Notifications 0 | ENERGY STAR Notifications | Contacts | Help | Sign Out

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.

Your Meter Entries for Bank

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

2 Energy Meter(s) for Bank

▼ Natural Gas

Start Date	End Date	Usage therms	Total Cost (\$)	Estimation
Click to add an entry				

✖ Delete Selected Entries
➕ Add Another Entry
📄 Learn how to copy/paste

Upload data in bulk for this meter:

📘 You can use the single-meter spreadsheet to either: "Upload" the file below, or copy and paste the data from the spreadsheet into the table above ([instructions in this FAQ](#)). Use this single-meter [spreadsheet template](#).

Choose File | No file chosen | **Upload**

► Electric Grid Meter

Continue Cancel

2.13. Indicate which meters should be used to calculate your building's energy metrics and whether the selected meters account for the building's entire energy consumption. Select **Apply Selections**.

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Welcome Hanlon: Account | Notifications 0 | ENERGY STAR Notifications | Contacts | Help | Sign Out

MyPortfolio | Sharing | Reporting | Recognition

Your meter entries have been added to your meters!

Select Meters to Include in Metrics

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

Summary

2

Please tell us what your meters represent.

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.](#)

Energy Meters

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

	Name	Meter ID	Type
<input checked="" type="checkbox"/>	Natural Gas	75473556	Natural Gas
<input checked="" type="checkbox"/>	Electric Grid Meter	75473557	Electric - Grid

Total of 2 meter(s). Tell us what this represents:

☒ These meter(s) account for the total energy consumption for [Bank](#) (a single building).

☐ These meter(s) do not account for the total energy consumption for [Bank](#) (a single building).

Apply Selections Cancel

- 2.14. A green banner will confirm you have successfully associated your meters with your property.

The screenshot displays the ENERGY STAR Portfolio Manager web application. At the top, the header includes the ENERGY STAR logo, the text "PortfolioManager", and a user welcome message "Welcome Hanlon: Account | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out". Below the header, a navigation bar contains tabs for "MyPortfolio", "Sharing", "Reporting", and "Recognition". A prominent green banner with a black border contains the message: "Congratulations! Any energy meters you selected have been successfully associated to your property(ies).". Below this banner, the "Bank" section shows property details: "230 madison street, State College, PA 16801", "Portfolio Manager Property ID: 10517248", and "Year Built: 2018". A "Change Metric" link is visible. To the right, a "Weather Normalized Source EUI (kBtu/ft²)" box shows "Current: N/A" and "Baseline: N/A". Below the property details, a tabbed interface shows "Summary", "Details", "Energy", "Water", "Waste & Materials", "Goals", and "Design". The "Energy" tab is active, displaying a "Meter Summary" box on the left with "2 Energy Meters Total" and "2 - Used to Compute Metrics". On the right, a section titled "Meters - Used to Compute Metrics (2)" includes links for "Change Meter Selections" and "View as a Diagram", and an "Add A Meter" button. Below this is a table listing the meters.

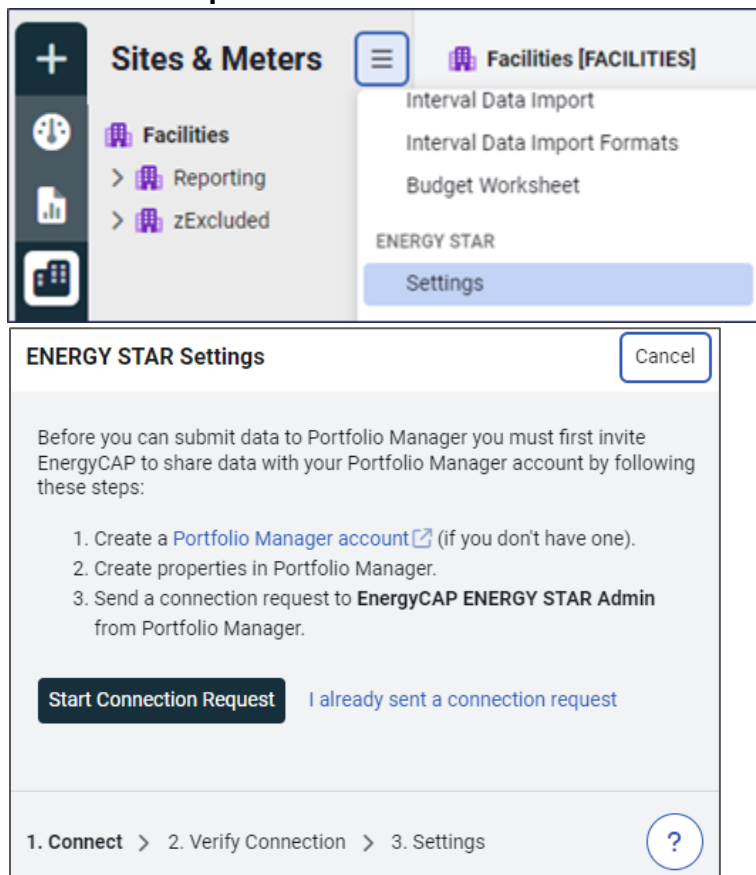
Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter 76473557	Electric - Grid		Yes
Natural Gas 76473556	Natural Gas		Yes

Section 3 | Connect your Portfolio Manager account to EnergyCAP's PM account

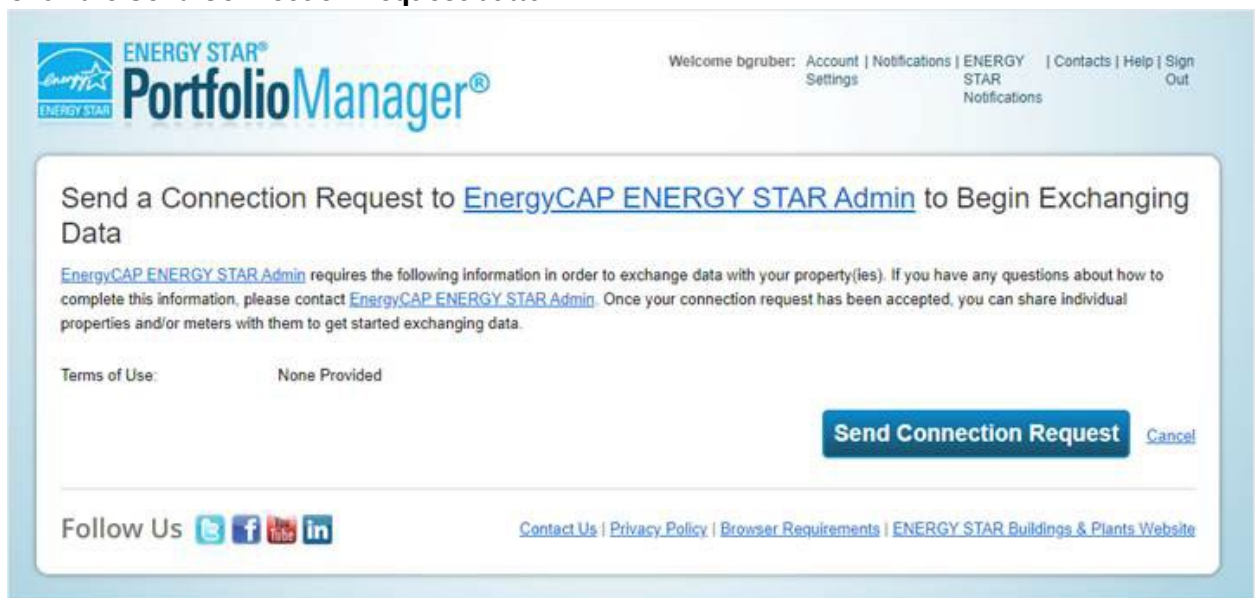
Before linking your PM account to EnergyCAP's PM account:

- Ensure all meters have been added to each property (all meters you wish to have UtilityManagement submit data for).
 - UtilityManagement can create these for you later.
- Any existing meter consumption data (bill data) has been deleted after the cutover date you plan to use in UtilityManagement to avoid overlapping/duplicate data. (Before submitting data with UtilityManagement, you must supply a cutover date—UtilityManagement will only submit data after this date.)
- UtilityManagement will **NOT** overwrite or delete:
 - Manually entered bills in PM.
 - Bills uploaded/submitted to PM from other sources.

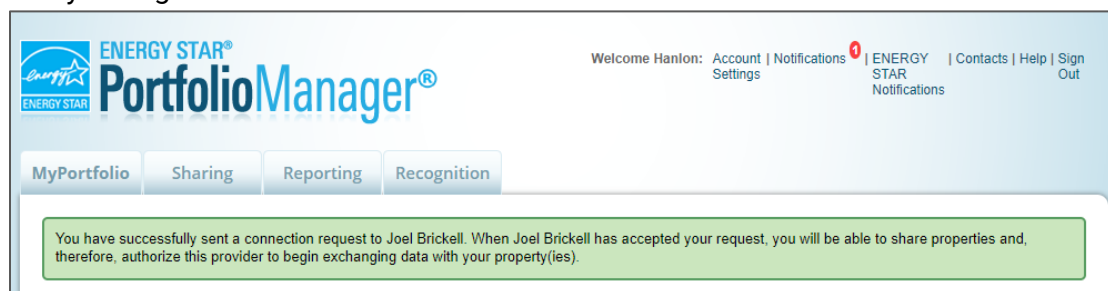
- 3.1. UtilityManagement helps initiate the Connection Request. In UtilityManagement, in the Sites and Meters module menu, select **Settings** for ENERGY STAR. Click **Start Connection Request**.



- 3.2. A new browser window opens with Portfolio Manager Connection Request. Click the **Send Connection Request** button.



- 3.3. A green banner indicates your request was sent. You are **not** yet connected to EnergyCAP UtilityManagement until you enter and verify your PM username in UtilityManagement.



- 3.4. In UtilityManagement enter your PM username to verify the connection.

ENERGY STAR Settings

Cancel

Verify

Provide your Portfolio Manager username so we can verify and accept your connection request.

Portfolio Manager username ⓘ

*

✔ Connect > 2. Verify Connection > 3. Settings

?

- 3.5. Configure your **Earliest submission month** and **Save**.

ENERGY STAR Settings

Cancel

Save

✔ We found your connection request. Set your earliest submission month and click Save to complete your ENERGY STAR configuration.

Portfolio Manager username

Earliest submission month

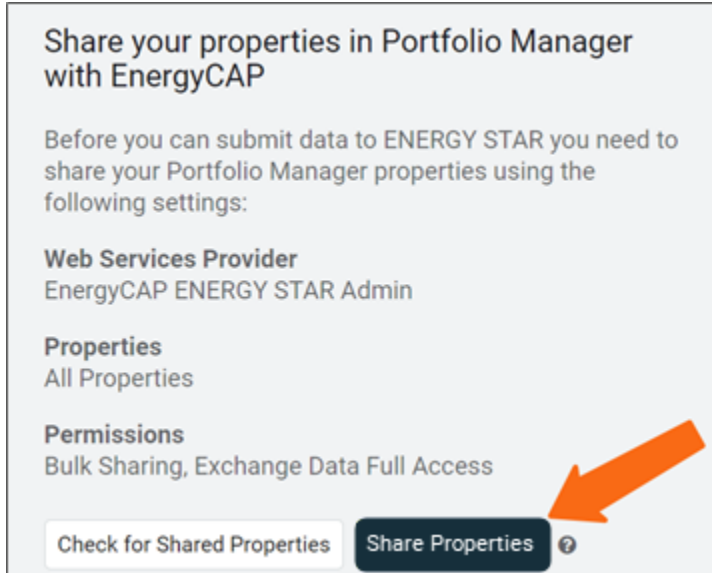
May ▼ 2021 ▼

✔ Connect > ✔ Verify Connection > 3. Settings

?

Section 4 | Share your Portfolio Manager properties with EnergyCAP's Portfolio Manager® account

4.1 After you verify your connection, UtilityManagement provides a Share Properties shortcut.



4.2 Share Properties for Exchanging Data

- Select **EnergyCAP**.
- Select all your properties.
- Click **Bulk Sharing** options and then **Exchange Data Full Access**.
- Click **Authorize Exchange**.

Share Properties for Exchanging Data

Choose Permissions

Set Up Connections

Check Existing Permissions

View Results/ Confirmation

Sometimes it's really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

1

Select Web Services Provider (Account)

Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.

Select web services provider from my contacts book:

EnergyCAP ENERGY STAR Admin (G5 ▾)

A

Unlike "regular sharing," when you "bulk share" with a Web Service Provider, you can only pick one provider. This is because the bulk share depends on the requirements/settings of the provider.

2

Select Properties

Which Properties do you want to share? *Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.*

Select Properties

B

Selected Properties: 0

3

Choose Permissions

If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

C

☒ **Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.

☒ Exchange Data Full Access (with full access to all properties and meters)

☐ Exchange Data Read Only Access (with read only access to all properties and meters)

☐ Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)

☐ Remove Access (i.e. remove existing access to all properties)

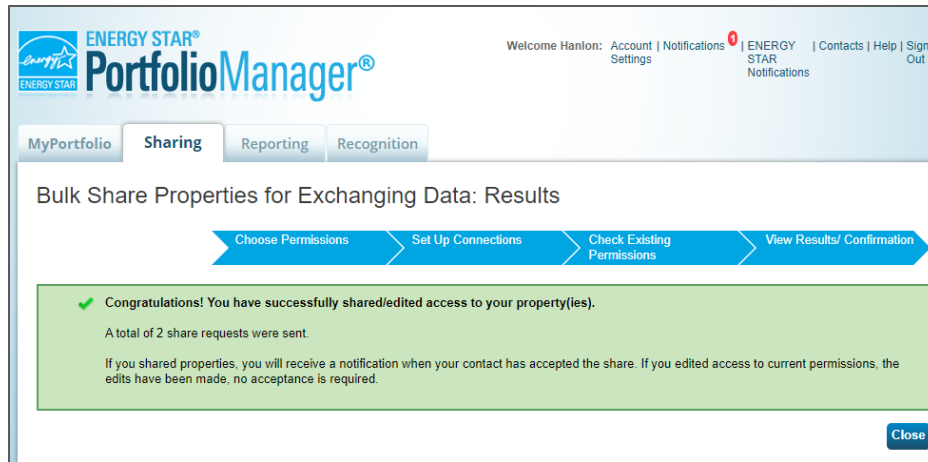
☐ **Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

Authorize Exchange

D

Cancel

4.3 A green banner confirms that you have successfully shared access to your properties. Click **Close**. NOTE: This process may take some time to complete.



4.4 After EnergyCAP has accepted your sharing request, your PM properties and meters will be available to link in UtilityManagement.

Section 5 | Sharing new properties and meters

Whenever you create new properties or meters in PM that you want to link to UtilityManagement, you must share those new properties and meters using the steps above.

Depending on the options you select, you may see the screen below and need to **Continue with Share and Overwrite**.

ENERGY STAR®
PortfolioManager®

Welcome city_of_hill_valley: Account | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out

MyPortfolio | **Sharing** | Reporting | Recognition

Bulk Share Properties for Exchanging Data: Review of Existing Permissions

Choose Permissions → Set Up Connections → Check Existing Permissions → View Results/Confirmation

Issues were found with the selections you made. If you select "Continue", the following will occur:

- ✓ 18 new share requests will be sent.
- ⚠ 1 share requests will overwrite existing permissions. Please review the list and confirm or cancel the shares in the table below.

A total of 19 share requests will be sent if you continue. If this is not what you wish to do, select "Cancel" to go back and modify your selections.

Confirm or Cancel Shares for Each Property (1):

Property Name	Your Permissions	EnergyCAP AutomatedTests's permissions		Continue with Share and Overwrite	Cancel Share
		Existing	Proposed		
Doc Brown Building	Full Access	Exchange Data	Exchange Data - Full	<input checked="" type="radio"/>	<input type="radio"/>

Page 1 of 1 | 100 ▼ | View 1 - 1 of 1

Continue [Cancel](#)

Section 6 | Troubleshooting

If **Exchange Data: Pending** is displayed under the sharing Permissions for EnergyCAP, your previous request has not yet been processed. If it has been more than 2 business days, contact EnergyCAP support.

If you receive an error message when trying to share a property, it may mean that you are not the Property Owner (the individual who set up the property profile). If the property has been shared with you, you are not permitted to share it with other accounts or EnergyCAP web services. You can determine who the Property Owner is by going to the Sharing tab and scrolling down to Properties Shared with Me.

Section 7 | Reshare or Change Permissions

Changing Permissions for Specific Properties and/or Meters

7.1 From the property profile Summary tab, under the Action drop-down menu, you have two options: Stop Exchanging Data or Edit Settings for Exchanging data.

To stop sharing your property and all associated meters with EnergyCAP, select Stop Sharing Data.

A pop-up window asks you to confirm that you want to remove EnergyCAP's access. Select Continue.

7.2 To share additional meters with EnergyCAP or remove EnergyCAP's access to individual meters, select Edit Settings for Exchanging Data.

Select the Exchange Data radio button.

A pop-up window will open. For meters you would like to remove EnergyCAP's access, select the **None** radio button.