

# Portfolio Manager Guide



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*The Delaware Valley Regional Planning Commission is dedicated to uniting the region's elected officials, planning professionals, and the public with a common vision of making a great region even greater. Shaping the way we live, work, and play, DVRPC builds consensus on improving transportation, promoting smart growth, protecting the environment, and enhancing the economy. We serve a diverse region of nine counties: Bucks, Chester, Delaware, Montgomery, and Philadelphia in Pennsylvania; and Burlington, Camden, Gloucester, and*

*Mercer in New Jersey. DVRPC is the federally designated Metropolitan Planning Organization for the Greater Philadelphia Region — leading the way to a better future.*



The symbol in our logo is adapted from the official DVRPC seal and is designed as a stylized image of the Delaware Valley. The outer ring symbolizes the region as a whole while the diagonal bar signifies the Delaware River. The two adjoining crescents represent the Commonwealth of Pennsylvania and the State of New Jersey.

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# Introduction

This guide was developed to provide assistance in the use of ENERGY STAR's Portfolio Manager. What follows is a step-by-step walkthrough on how to enter buildings into the system, set up utility meters, and add billing data to those meters, as well as how to generate energy reports and share data with others. DVRPC has requested each DTA community to submit copies of all utility bills for a minimum of 1 year (current YTD), preferably 2 years, for all municipal operations. Using Portfolio Manager, that data can be analyzed to review energy cost and use, annual energy expenditures, provide benchmarking, and determine "Energy Use Intensity" (EUI) scores for each building.

## What is Benchmarking?

Benchmarking is the process of measuring and comparing energy performance over time for a single building or multiple buildings. Benchmarking allows property owners to analyze energy use and determine where improvements can be made in energy consumption and energy efficiency.

# Getting Started

## Data Collection Checklist

Before you begin, please take note of all of the information you will need for each building.

- Name of the building
- Type of building (office, utility, public service – see page 6 for more details)
- Gross floor area of the building (in square feet)
- Weekly operating hours (hours per week that the office space is 75% occupied)
- Number of workers on main shift
- Number of personal computers
- Percent of total floor space that is cooled
- Percent of total floor space that is heated

# Getting Started

## Portfolio Manager Main Page

The screenshot displays the Portfolio Manager interface. At the top left is the ENERGY STAR logo and the text 'PortfolioManager®'. Below this are navigation tabs: 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. The 'MyPortfolio' tab is active. On the left side, there are three widgets: 'Properties (165)' with an 'Add a Property' button, 'Source EUI Trend (kBtu/ft²)' with a line graph showing a peak in 2009, and 'Total GHG Emissions Trend (MtCO2e)' with a line graph showing a peak in 2009. The main content area is titled 'My Properties (165)' and includes a search bar, a filter dropdown set to 'Towamencin Township (9)', and a table of properties. The table has columns for 'Name' and 'Action'. The 'Action' column contains dropdown menus with the text 'I want to...'. A red arrow points from the 'Add a Property' button to the text 'To add a building, click here.' Another red arrow points from the 'Add a Property' button to the text 'Each of your buildings is located under the “My Portfolio Tab” in the main dashboard of Portfolio Manager. Under “My Properties,” select any building to get started.' A third red arrow points from the dropdown menu for 'Towamencin Township - Pump Station Hollis' to the text 'Click on a building name to go directly to that building’s “Summary” page.' A fourth red arrow points from the dropdown menu for 'Towamencin Township - Public Works Building' to the text 'Alternatively, there is a drop-down menu to the right with options to Add/Edit Bills, Update Use Details, Set Goals, Share with Others, or Add to a Group.'

Each of your buildings is located under the “My Portfolio Tab” in the main dashboard of Portfolio Manager. Under “My Properties,” select any building to get started.

To add a building, click here.

Click on a building name to go directly to that building’s “Summary” page.

Alternatively, there is a drop-down menu to the right with options to Add/Edit Bills, Update Use Details, Set Goals, Share with Others, or Add to a Group.

# Getting Started

## Add a Property

Here are the options you will see when you add a building.

Select the primary function of your building, such as office, retail, public service, or utility. See [Decoding Municipal Building Types](#) (page 6) for more information on how to identify the appropriate function for your building.

Select whether your property is part of a building, a single building, or multiple buildings. Most users will select “single building.”

Your building may already be built or it may be in the design phase.

The screenshot shows a form titled 'Add a Property' for 'ACME BANK'. It is divided into three sections:

- Your Property's Primary Function:** A dropdown menu with the text 'Select a primary function' and a link to 'Learn more about primary functions/property types.' A red arrow points to the dropdown arrow.
- Your Property's Buildings:** A question 'How many physical buildings do you consider part of your property?' with three radio button options: 'None: My property is part of a building', 'One: My property is a single building', and 'More than One: My property includes multiple buildings'. Below the 'More than One' option is a text input field labeled 'How many?'. A red arrow points to the 'More than One' radio button.
- Your Property's Construction Status:** A question 'Is your property already built or are you entering this property as a construction project that has not yet been completed?' with two radio button options: '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.' and '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.' A red arrow points to the 'Design Project' radio button.

At the bottom right of the form are two buttons: 'Get Started!' and 'Cancel'.

# Getting Started

## Add a Property

About Your Property

Name:

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

Year Built:

Gross Floor Area:    Temporary Value

Gross Floor Area is the total floor area, expressed in square feet or square meters, measured from the principal exterior surfaces of the building(s) and not including parking area(s).

Occupancy:  %

Do any of these apply?

My property's energy consumption includes parking areas

My property has a Data Center that requires a constant power load of 75 kW or more

My property has one or more retail stores

My property has one or more restaurants/cafeterias

[Cancel](#)

On this page, you will be able to enter details about your building. The name you choose is what will appear in Portfolio Manager. It will appear in alphabetical order under “My Properties.”

If you do not know the exact gross floor area of your building, check “Temporary Value” until you have a chance to confirm.

These additional options will help Portfolio Manager give accurate results.



# Getting Started

## Add a Property

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:	Police Building Test	Country:	US
Primarily:	Police Station	Address:	190 N Independence Mall West Philadelphia, PA 19106 <a href="#">Map It</a>
Year Built:	2001	Property consists of:	1 building

[Edit](#)

[Add](#)

### Building Use [Edit Name](#)

Police Station applies to buildings used for federal, state, or local police forces and their associated office space.

Gross Floor Area should include all space within the building(s), including offices, temporary holding cells, kitchens used by staff, lobbies, atriums, conference rooms and auditoriums, 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="300000"/> Sq. Ft.	01/01/2001	<input type="checkbox"/>
Weekly Operating Hours	<input type="text"/>	01/01/2001	<input type="checkbox"/>
Number of Workers on Main Shift	<input type="text"/>	01/01/2001	<input type="checkbox"/>
Number of Computers	<input type="text"/>	01/01/2001	<input type="checkbox"/>

[Back](#) [Add Property](#) [Cancel](#)

The information you entered in the previous page will be shown here. If anything is incorrect, click “Edit” to go back and make changes.

You have the option to add another use type, if your building has more than one use.

The information entered here will help Portfolio Manager calculate energy use data. Gross floor area is required. If you do not know the exact value for any information you have entered, check “Temporary Value” to the right until you have the chance to confirm.

# Getting Started

## Decoding Municipal Building Types

The building type you selected when adding a building will affect what types of information you will be able to enter and how Portfolio Manager will calculate energy performance. Use this chart to help select the appropriate building type.

Type of Municipal Building	Portfolio Manager Building Type
Administration/Police	Office
Civic Center	Office
Garage	Other – Other
Pumping Station	Utility – Other
Fire Station	Public Services – Fire Station
Library	Public Services – Library
Wastewater Treatment Plant	Utility – Wastewater Treatment Plant
Water Treatment Facility	Public Services – Drinking Water Treatment & Distribution

# Getting Started

## Building Dashboard

Your building information will appear here.

Summary Details Meters Goals Design

Weather-Normalized Source EUI (kBtu/ft<sup>2</sup>)  
Current EUI: 248  
Baseline EUI: 255.9

Property Profile  
You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about your property, including a photo.  
[Create Profile](#)

Notifications  
You have no new notifications.

Sharing this Property  
Shared with: 3 Contacts [Share](#)

Name	Permissions	Action
	Custom Access	I want to...
	Full Access	I want to...
	Full Access	I want to...

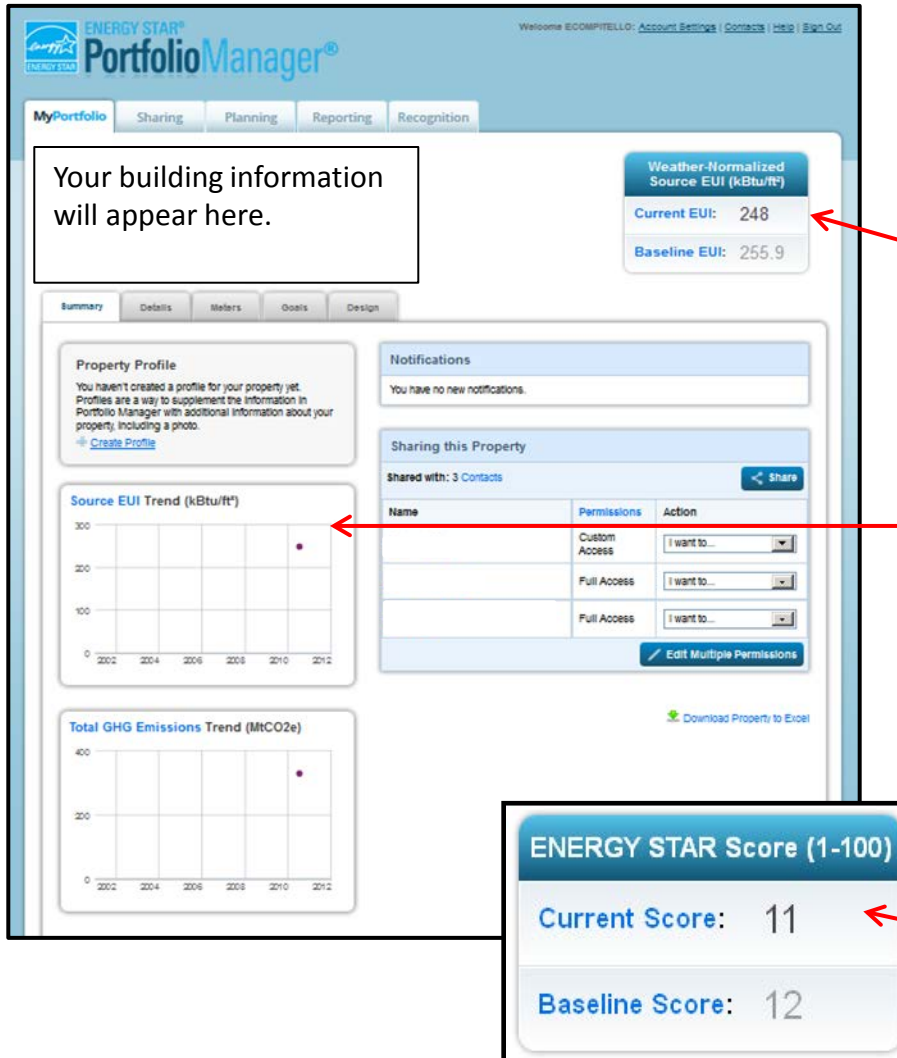
[Download Property to Excel](#)

Source EUI Trend (kBtu/ft<sup>2</sup>)  
Total GHG Emissions Trend (MtCO<sub>2</sub>e)

This is the dashboard for the building you have selected. The tabs located below the building address allow you to view and edit Details, including the basic information of the building, Meters, in which you can add or edit utility meters, Goals, which allows you to view energy performance and metrics, and Design, which contains information such as the building's ENERGY STAR score, energy cost, and energy use intensity.

# Getting Started

## Energy Use Intensity



**Energy Use Intensity (EUI)** is a commonly-used measure for benchmarking the energy performance of a building. Generally, a low EUI is an indicator for good energy performance.

The EUI of your building will appear here, as long as at least one year worth of data has been entered.

If more than one year of data has been entered, you will be able to see how the EUI of your building has changed year to year in this graph.

More detailed EUI information and other metrics can be viewed by clicking on the "Design" tab.

**Tip:** If the building is eligible for an ENERGY STAR Score, it will appear in place of the EUI. A high ENERGY STAR Score generally indicates good energy performance.

# Getting Started

## Edit Property Information

To edit the information you provided when you added the building, click on the “Details” tab.

Then, click on “View/Edit all Details.”

Summary **Details** Meters Goals Design

### Basic Information

[View/Edit all Details](#)

**Construction Status:**  
Existing

**Federal Property:**  
Not Set

**Find A Service & Product Provider (SPP):**  
Empty

Editing basic information also includes name, address, etc.

**Edit**

### This Property's Overall Use

[View as Diagram](#) Add Another Type of Use  **Add**

Name	Primary Function	Gross Floor Area	Action
▶ Administration	Office	11826 ft <sup>2</sup>	I want to...
▶ Meeting Rooms	Office	4242 ft <sup>2</sup>	I want to...
▶ Police Station Use	Police Station	11300 ft <sup>2</sup>	I want to...
▶ Other Use	Other	2000 ft <sup>2</sup>	I want to...

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

### Gross Floor Area Comparison

**Use Total GFA** **Property GFA**

The total of the **Gross Floor Area** for your uses equals the **Gross Floor Area** for your property. [Learn more.](#)

Category	Value
Use Total GFA	29,368
Property GFA	29,368

### Keeping Your Property Information up to date

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

### Unique Identifiers (IDs)

**Portfolio Manager ID:**  
3332885

**Standard IDs:** None

**Custom IDs:** None

You can select from Portfolio Manager's Standard IDs to provide information to...

# Adding Meters and Data

## Add a Meter

Summary Details **Meters** Goals Design

Energy & Water Consumption  
[Manage/Enter My Bills](#)

Meters for Performance Metrics  
[View/Edit Configuration](#)

Utility & Weather  
**Electric Distribution Utility (EDU):**  
PECO Energy Co [Exelon Corp]  
**Regional Power Grid:**  
Mid Atlantic  
**Weather Station:**  
DOYLESTOWN (725113)  
Your electric distribution utility (EDU) and weather station selections affect the calculation of your energy metrics.

Energy Meters (4)  
[View as a Diagram](#) [Add Another Meter](#)

Name	Energy Type	Most Recent Bill Date	Action
<a href="#">001871013 - Electric</a>	Electric - Grid	07/31/2013	<a href="#">I want to...</a>
<a href="#">027885067 - Natural Gas</a>	Natural Gas	09/30/2012	<a href="#">I want to...</a>
<a href="#">Fuel Oil (No. 2)</a>	Fuel Oil (No. 2)	09/30/2012	<a href="#">I want to...</a>
<a href="#">Propane</a>	Propane	09/30/2012	<a href="#">I want to...</a>

Water Meters (0)  
[View as a Diagram](#) [Add Another Meter](#)


**i** You have not entered any water meters yet. After [entering the meter](#), you will need to [associate](#) it in order to receive metrics.

Click the “Meters” tab to view the meters for your building.

To add energy and/or water meters, click here.

# Adding Meters and Data

## Add a Meter



### Sources of Your Property's Energy

How does your property [acquire energy](#)? Please select all that apply.

Electric

purchased from the grid ←

How Many Meters?

generated on site with my own solar panels

generated on site with my own wind turbines

Natural Gas

How Many Meters?

Propane

Fuel Oil (No. 2) ←

How Many Meters?

Diesel


District Steam

District Hot Water

District Chilled Water

Don't see your energy sources?

[+ See more energy sources?](#)



### Your Property's Water Usage

How does your property [use water](#)? Please select all that apply.

Municipally Supplied Potable Water

Municipally Supplied Reclaimed Water

Alternative Water Generated On-Site:

Other:

[Get Started!](#) [Cancel](#)

You will see this page when adding meters. You may add multiple meters simultaneously. In this example, we will add one grid-purchased electric, one natural gas, and one fuel oil meter.

For each type of meter, you will be able to enter how many meters you are adding.

# Adding Meters and Data

## Add a Meter

### About Your Meters for Towamencin - Administration + Police Building

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.

#### 3 Energy Meters for Towamencin - Administration + Police Building (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?
<input type="checkbox"/>	Natural Gas	Natural Gas		ccf (hundred cubic feet)	1/1/2013	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Fuel Oil (No. 2)	Fuel Oil (No. 2)		Gallons	1/1/2013	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="text" value="Electric Grid Meter"/>	<input type="text" value="Electric - Grid"/>		<input type="text" value="kWh (thousand )"/>	<input type="text" value="1/1/2013"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

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

#### 0 Water Meter for Towamencin - Administration + Police Building (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive
--------------------------	------------	------	------------	-------	--------------------------	---------	----------------------------

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

[Cancel](#)

Click the blank area under “Units” and the shown dialog box will appear.

Select the same units that you will use to enter usage data (i.e., use the same units that your utility company uses to bill you currently).

You can edit the name of each meter here.

The date the meter became active is the date of the first bill.

If you uncheck “In Use?,” you will be able to enter the date of the last bill of a meter that is no longer active.



# Adding Meters and Data

## Add a Meter

Your Meter Entries for Towamencin - Administration + Police Building

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

3 Energy Meter(s) for Towamencin - Administration + Police Building

▼ Natural Gas [Edit](#) ✕ Delete Meter

	Start Date	End Date	Usage ccf (hundred cubic feet)	Cost (\$)	Estimation
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

✕ [Delete Selected Entries](#)  You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#).  No file selected.

✚ [Add Another Entry](#)

▶ Fuel Oil (No. 2) [Edit](#) ✕ Delete Meter

▶ Electric Grid Meter [Edit](#) ✕ Delete Meter

[Cancel](#)

On this page, enter billing data for your meters. [See Sample PECO Bill](#) (page 16) for more information on how to find data on your bill, and see [Add Billing Data](#) (page 17) for more information about entering data.

# Adding Meters and Data

## Add a Meter

Congratulations! You have successfully added meters to your property.

### Meters to add to Total Consumption for Metrics for Lansdowne - Public Library

Tell us which meters to include when calculating the total usage for this property so that we can provide you with the most accurate metrics possible.

#### Property Totals



#### Energy Meters

Check the boxes for the meters that should be included in the energy metrics:

<input checked="" type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	Electric Grid Meter

Total of 1 energy meter(s). Tell us what these meter(s) measure:

- These meter(s) account for the total energy consumption for this property.
- These meter(s) do not account for the total energy consumption for this property.



#### Water Meters

There are currently no water meters entered for this property/building. [Enter information about your water meters](#) to begin tracking water usage alongside your energy usage.



Because of the wide variety of ways that people meter their properties, after you create meters for your property in Portfolio Manager, you must indicate which meters to use for your property metrics. In some cases, you will not want a meter to count for your metrics. For example, if you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

Apply Selections

[Cancel](#)

This is the page you will see after you have finished setting up your meters.

You have the option to include the meter(s) you have entered in your energy metrics and total consumption data.

If any changes are made here, click “Apply Selections” when you are done.

# Adding Meters and Data

## Sample PECO Bill

This sample bill shows where you will find the data you need to enter into Portfolio Manager. A single PECO bill may contain both natural gas and electric bills.

PECO  
An Exelon Company

Emergency and Repairs: 1-800-841-4141. This is the number to call to report power outages, gas leaks or odors, and safety hazards related to PECO equipment. For all other business, call 1-800-494-4000.

Name: [REDACTED] Page 2

Account Number: [REDACTED]

**Meter Information**

Read Date	Meter Number	Load Type	Reading Type	Meter Reading Previous	Meter Reading Present	Difference	Multiplier X	Usage
10/16	[REDACTED]	General Service	Total Ccf	2899 Actual	2704 Actual	6	1	8
10/16	[REDACTED]	General Service	Tot kWh	45969 Actual	49717 Actual	3748	1	3748
10/16	[REDACTED]	General Service	Pk kWh	0.00 Actual	16.46 Actual	16.46	1	16.46

Total Ccf Used ..... 6      Distribution kW - Measured ..... 16.5  
Total kWh Used ..... 3,748

---

**Gas Commercial Service - Current Period Detail**      Service 09/15/2011 to 10/16/2011 - 31 days

Customer Charge				\$28.55
Natural Gas Supply Charges	6 Ccf	X	\$0.45243	2.71
Distribution Charges	6 Ccf	X	0.37782	2.27
Balancing Service Charges	6 Ccf	X	0.04330	0.26
Gas Cost Adjustment Charges	6 Ccf	X	0.00423	0.03
State Tax Adjustment				-0.04
<b>Total Current Charges</b>				<b>\$33.78</b>

**Your Usage Profile**

13-Month Usage (Total Ccf)

Period	Usage	Avg Daily Usage	Days	Avg Daily Temp
Current Month	6	0.1	31	65
Last Month	8	0.2	30	74
Last Year	8	0.2	29	67

Avg Ccf per Month: 7  
Total Annual Ccf Usage: 88

---

**Electric Commercial Service 0-100kW - Current Period Detail**      Service 09/15/2011 to 10/16/2011 - 31 days

Customer Charge				\$15.04
Distribution Charges	16.50 kW	X	\$4.96000	81.84
Distribution Charges	3,748 kWh	X	0.00490	18.37
Energy Efficiency Charge	3,748 kWh	X	0.00270	10.12
State Tax Adjustment				-0.08
COMMERCE ENERGY INC. Charges / 877-228-5392				417.90
ENERGY CHARGE-3748KWH@0.111500 PER KWH				4.95
MONTHLY FEE				25.37
Sales Tax				
<b>Total Current Charges</b>				<b>\$573.51</b>

### Usage

Under "Reading Type," **ccf** indicates natural gas, and **kWh** indicates electricity.

### Start and End Dates – Natural Gas

### Cost – Natural Gas

### Start and End Dates – Electricity

### Cost – Electricity

# Adding Meters and Data

## Add Billing Data

**Tip:** This page defaults to showing only one year of data. Click inside this box and select “Show All Years” to view all data.

001871013 - Electric  These are your already created meters. Do you need to [Add another meter](#)

Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost (\$)	Estimation	Green Power	Last Updated
<input type="checkbox"/>	11/29/2012	1/2/2013	34176	3284.62	<input type="checkbox"/>	<input type="checkbox"/>	10/23/2013 Liz Compitello
<input type="checkbox"/>	1/2/2013	2/3/2013	33504	3226.78	<input type="checkbox"/>	<input type="checkbox"/>	10/23/2013 Liz Compitello
<input type="checkbox"/>	2/3/2013	3/4/2013	27936	2711.41	<input type="checkbox"/>	<input type="checkbox"/>	10/23/2013 Liz Compitello
<input type="checkbox"/>	3/4/2013	4/2/2013	26112	2562.74	<input type="checkbox"/>	<input type="checkbox"/>	10/23/2013 Liz Compitello
<input type="checkbox"/>	4/2/2013	5/1/2013	27072	2829.98	<input type="checkbox"/>	<input type="checkbox"/>	10/23/2013 Liz Compitello
<input type="checkbox"/>	5/1/2013	6/2/2013	37152	3493.06	<input type="checkbox"/>	<input type="checkbox"/>	10/23/2013 Liz Compitello
<input type="checkbox"/>	6/2/2013	7/1/2013	41088	3751.63	<input type="checkbox"/>	<input type="checkbox"/>	10/23/2013 Liz Compitello
<input type="checkbox"/>	7/1/2013	7/31/2013	52128	4773.88	<input type="checkbox"/>	<input type="checkbox"/>	10/23/2013 Liz Compitello

You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#).  No file selected.

Did you know you can work with another organization to regularly upload your data into Portfolio Manager? You can authorize these companies to update your meters, manage building data, and retrieve metrics. To get started, [search for organizations that exchange data](#).

**You have three options to enter billing data:**

1) Enter meter data directly into Portfolio Manager. Enter each meter entry in a separate line.

2) Download an Excel template that will allow you to copy and paste data into a spreadsheet. See [Update a Single Meter Using Excel](#) (page 21) for further instructions.

3) Enter meter data for multiple meters of a single building using just one Excel spreadsheet. See [Update Multiple Meters Simultaneously](#) (page 22) for further instructions.

**Tip:** Billing periods should not overlap. If they do, an error will occur.

# Adding Meters and Data

## Data Collection Spreadsheets

We have provided Excel templates to help you manage your utility bill data. Additionally, they can assist you in entering data into Portfolio Manager.

PECO BILL							Credits/ AC Saver	EXCELON BILL (generation)				
PECO - TWP BLDG - 2018												
Acct: 61403-366												
SERVICE DATES	kWh	Cost	Cost	AMT OF CHE	Cost	CHECK #	AMT	## DUE	CHECK DATE	CHECK #	CHECK AMT.	PROVIDER
11/4/2011 12/4/2011			1164	\$ 1,160.00								
12/4/2011 1/5/2012			2252	\$ 2,264.59								
1/5/2012 2/6/2012			2602	\$ 2,594.00								
2/6/2012 3/6/2012			2581	\$ 2,547.33								
3/6/2012 4/4/2012			1343	\$ 1,339.00								
4/4/2012 5/3/2012			723	\$ 731.14								
5/3/2012 6/4/2012			154	\$ 178.17								
6/4/2012 7/4/2012			10	\$ 37.00								
7/4/2012 8/2/2012			7	\$ 35.00								
8/2/2012 9/3/2012			8	\$ 35.92								

There is a separate tab for each building that you manage. The FACTORS tab contains formulas and fields for square footage for each building, which help calculate EUI. (EUI is calculated in the “metrics” columns, described on p. 20.)

Enter your PECO bill data here. Each row should contain a separate bill, and billing dates should not overlap (though they may overlap by one day).

If you receive a separate bill through a third-party generation supplier, enter your billing data here. (Sample community uses EXCELON as their supplier.)

# Adding Meters and Data

## Data Collection Spreadsheets

The data you have entered under the “PECO Bill” section will automatically be copied to the “Portfolio Manager” section. This is in the same format as Portfolio Manager’s Excel “spreadsheet templates” for entering data, described in [Upload Data Using Excel](#) (page 21).

PORTFOLIO MANAGER								TOTAL ENERGY COST	RATES		METRICS		
ELECTRIC				NATURAL GAS					\$/kWh	\$/CCF	kBtu	EUI	12-MONTH
Start Date	End Date	Usage	Cost	Start Date	End Date	Usage	Cost						
11/4/2011	12/4/2011	0	\$ -	11/4/2011	12/4/2011	1164	\$ 1,160.00	\$ 1,160.00	#DIV/0!	\$ 1.00	118,728.00		
12/4/2011	1/5/2012	0	\$ -	12/4/2011	1/5/2012	2252	#####	\$ 2,264.59	#DIV/0!	\$ 1.01	229,704.00		
1/5/2012	2/6/2012	0	\$ -	1/5/2012	2/6/2012	2602	#####	\$ 2,594.00	#DIV/0!	\$ 1.00	265,404.00		
2/6/2012	3/6/2012	0	\$ -	2/6/2012	3/6/2012	2581	#####	\$ 2,547.33	#DIV/0!	\$ 0.99	263,262.00		
3/6/2012	4/4/2012	0	\$ -	3/6/2012	4/4/2012	1343	\$1,339.00	\$ 1,339.00	#DIV/0!	\$ 1.00	136,986.00		
4/4/2012	5/3/2012	0	\$ -	4/4/2012	5/3/2012	723	\$ 731.14	\$ 731.14	#DIV/0!	\$ 1.01	73,746.00		
5/3/2012	6/4/2012	0	\$ -	5/3/2012	6/4/2012	154	\$ 178.17	\$ 178.17	#DIV/0!	\$ 1.16	15,708.00		
6/4/2012	7/4/2012	0	\$ -	6/4/2012	7/4/2012	10	\$ 37.00	\$ 37.00	#DIV/0!	\$ 3.70	1,020.00		
7/4/2012	8/2/2012	0	\$ -	7/4/2012	8/2/2012	7	\$ 35.00	\$ 35.00	#DIV/0!	\$ 5.00	714.00		
8/2/2012	9/3/2012	0	\$ -	8/2/2012	9/3/2012	8	\$ 35.92	\$ 35.92	#DIV/0!	\$ 4.49	816.00		
9/3/2012	10/3/2012	0	\$ -	9/3/2012	10/3/2012	8	\$ 35.92	\$ 35.92	#DIV/0!	\$ 4.49	816.00		
10/3/2012	11/2/2012	0	\$ -	10/3/2012	11/2/2012	704	\$ 680.67	\$ 680.67	#DIV/0!	\$ 0.97	71,808.00	115.56	
1/0/1900	1/0/1900	0	\$ -	1/0/1900	1/0/1900	0	\$ -	\$ -	#DIV/0!	#DIV/0!	-	#####	
1/0/1900	1/0/1900	0	\$ -	1/0/1900	1/0/1900	0	\$ -	\$ -	#DIV/0!	#DIV/0!	-		
1/0/1900	1/0/1900	0	\$ -	1/0/1900	1/0/1900	0	\$ -	\$ -	#DIV/0!	#DIV/0!	-		

↑  
The data in these four columns can be copied directly into a “Spreadsheet Template” generated by Portfolio Manager. See p. 21 for more information.

↑  
The data in these four columns can be copied directly into a “Spreadsheet Template” generated by Portfolio Manager. See p. 21 for more information.

↑  
Your energy metrics are calculated automatically and appear here. See p. 20 for more information on these energy metrics.

# Adding Meters and Data

## More Information on Energy Metrics

AB	AC	AD	AE	AF	AG
TOTAL ENERGY COST	RATES		METRICS		
	\$/kWh	\$/CCF	kBtu	EUI	12-MONTH \$
\$ 1,160.00	#DIV/0!	\$ 1.00	118,728.00		
\$ 2,264.59	#DIV/0!	\$ 1.01	229,704.00		
\$ 2,594.00	#DIV/0!	\$ 1.00	265,404.00		
\$ 2,547.33	#DIV/0!	\$ 0.99	263,262.00		
\$ 1,339.00	#DIV/0!	\$ 1.00	136,986.00		
\$ 731.14	#DIV/0!	\$ 1.01	73,746.00		
\$ 178.17	#DIV/0!	\$ 1.16	15,708.00		
\$ 37.00	#DIV/0!	\$ 3.70	1,020.00		
\$ 35.00	#DIV/0!	\$ 5.00	714.00		
\$ 35.92	#DIV/0!	\$ 4.49	816.00		
\$ 35.92	#DIV/0!	\$ 4.49	816.00		
\$ 680.67	#DIV/0!	\$ 0.97	71,808.00	115.56	#####
\$ -	#DIV/0!	#DIV/0!	-		
\$ -	#DIV/0!	#DIV/0!	-		
\$ -	#DIV/0!	#DIV/0!	-		

The following are definitions of the energy metrics that appear in the data collection spreadsheet.

### Total Energy Cost

The total cost of all bills for a given billing period.

### \$/kWh

Price per kilowatt-hour of electricity.

### \$/CCF

Price per hundred cubic feet of natural gas.

### EUI

Energy Use Intensity. (See page 8 for further explanation.)

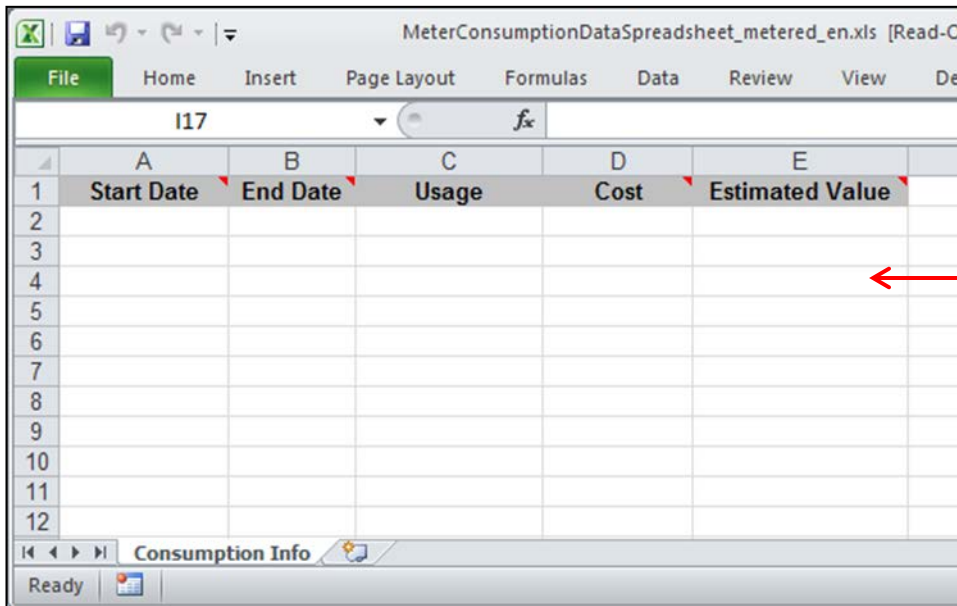
### 12-Month \$\$

Total energy cost for the past 12 months of billing data.

# Upload Data Using Excel

## Update a Single Meter Using Excel

You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#).  No file selected.



The screenshot shows an Excel spreadsheet titled "MeterConsumptionDataSpreadsheet\_metered\_en.xls". The spreadsheet has a header row with the following columns: "Start Date", "End Date", "Usage", "Cost", and "Estimated Value". The rows are numbered 1 through 12. A red arrow points to the empty rows below the header, indicating where to enter data.

	A	B	C	D	E
1	Start Date	End Date	Usage	Cost	Estimated Value
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					

As shown on the previous slide, you can click on “**spreadsheet template**” to download a blank Excel template. This option is located below the table used for entering billing data manually.

The downloaded Excel spreadsheet will look like this. Enter each bill into a separate line. Make sure to fill in all columns to avoid any potential errors.

You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#).  No file selected.

When you are done editing the spreadsheet, return to the same page in your Internet browser. Click “Browse” to locate the file on your computer. Then, click “Upload” to upload the data.



# Upload Data Using Excel

## Update Multiple Meters Simultaneously

Your building information will appear here.

Weather-Normalized Source EUI (kBtu/ft²)  
Current EUI: 248  
Baseline EUI: 255.9

Summary Details **Meters** Rooms Design

Energy & Water Consumption  
Manage/Enter My Bills

Meters for Performance Metrics  
View/Edit Configuration

Utility & Weather  
Electric Distribution Utility (EDU):  
PECO Energy Co [Exelon Corp]  
Regional Power Grid:  
Mid Atlantic  
Weather Station:  
DOYLESTOWN (725113)  
Your electric distribution utility (EDU) and weather station selections affect the calculation of your energy metrics.  
Edit

Energy Meters (4)  
View as a Diagram  
Add Another Meter

Name	Energy Type	Most Recent Bill Date	Action
001871013 - Electric	Electric - Grid	09/30/2012	I want to...
027885067 - Natural Gas	Natural Gas	09/30/2012	I want to...
Fuel Oil (No. 2)	Fuel Oil (No. 2)	09/30/2012	I want to...
Propane	Propane	09/30/2012	I want to...

Water Meters (0)  
View as a Diagram  
Add Another Meter

You have not entered any water meters yet. After entering the meter, you will need to associate it in order to receive metrics.

Update Multiple Meters Simultaneously  
Portfolio Manager has an upload tool that will help you create a spreadsheet template to use to update all of your meters at once.

This feature allows you to add billing data for multiple meters of a single building using just one Excel spreadsheet. It can be found in the “Meters” tab.

Click “spreadsheet template,” which is under “Update Multiple Meters Simultaneously.”

# Upload Data Using Excel

## Update Multiple Meters Simultaneously

### 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:  No file selected.

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 MG 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.

Click "Create an Upload Template." This will generate an Excel spreadsheet that will allow you to enter data for any meters which have been added to the building.

# Upload Data Using Excel

## Update Multiple Meters Simultaneously

Click “Add Bills to Existing Meters.”

In the drop-down menu, select “Multiple Properties.” Click “Select Properties,” and a pop-up window will allow you to select which buildings you would like to add meter data to.

Select the meter types you would like to edit and how many bills there are for each meter. In the template, all meters of the same type will have the same number of entries.

When you are done, click “Create & Download Template.”

**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)
- Edit Basic Property Information for Existing Properties (such as name and address)

**2 Select Properties to Include**

Properties:   [Selected Items: 9](#)

**3 Select Detailed Information to Include**

Meter Types:

- Electric
  - purchased from the grid
  - How many bills for this type of meter?
- Natural Gas
  - How many bills for this type of meter?
- Propane
  - How many bills for this type of meter?
- Fuel Oil (No. 2)
  - How many bills for this type of meter?

**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.

# Upload Data Using Excel

## Update Multiple Meters Simultaneously

### 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:  No file selected.

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 MG 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 upload](#). [Click here for more information.](#) You may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

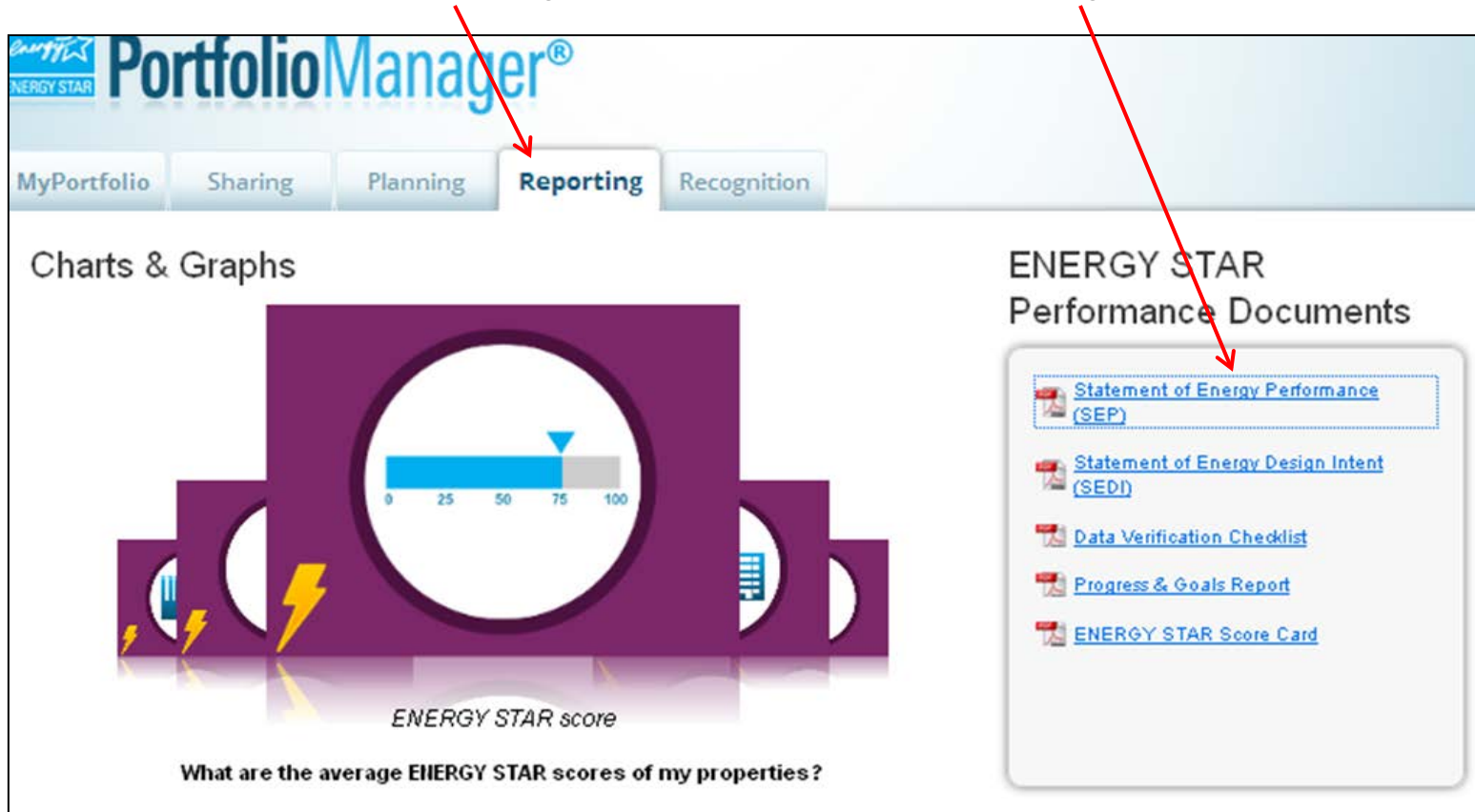
When you are done editing an upload template, select the type of upload from the drop-down menu, and click "Browse" to locate the upload template from your computer. Then click "Upload."

# Data Reports and Sharing

## Generate a Statement of Energy Performance

Portfolio Manager can generate a Statement of Energy Performance for any building with at least a year of billing data. That document can be used to share your building's progress.

This feature is located in the "Reporting" tab. Click on "Statement of Energy Performance (SEP)."



The screenshot displays the Portfolio Manager interface. At the top, the "Reporting" tab is selected, indicated by a red arrow. Below the navigation tabs, the "Charts & Graphs" section features a large purple graphic with a circular gauge showing an ENERGY STAR score of approximately 75. Below this graphic is the text "ENERGY STAR score" and the question "What are the average ENERGY STAR scores of my properties?". To the right, the "ENERGY STAR Performance Documents" section is visible, with a red arrow pointing to the "Statement of Energy Performance (SEP)" link. Other links in this section include "Statement of Energy Design Intent (SEDI)", "Data Verification Checklist", "Progress & Goals Report", and "ENERGY STAR Score Card".

# Data Reports and Sharing

## Generate a Statement of Energy Performance

This is the next page you will see.

Select which building you would like to generate a report for.

Then, select the timeframe of the report.

Finally, click “Generate & Download Report(s).” This will generate a PDF document, which you can print, e-mail, or keep for your records.

MyPortfolio | Sharing | Planning | 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.

- Select Report(s) to Download**
  - Statement of Energy Performance (SEP)
  - ENERGY STAR Data Verification Checklist
  - Score Card
  - Progress and Goals Report
  - Statement of Energy Design Intent (SEDI)
- Select Property for Report(s)**

Property: \*
- Select Timeframe for Report(s)**

Timeframe: \*
- Select Contacts for Report(s)**

Select Property Contacts:

Primary Contact:  [Add Contact](#)

Property Owner:  [Add Organization](#)

Verifying Professional:  [Add Contact](#)

[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.

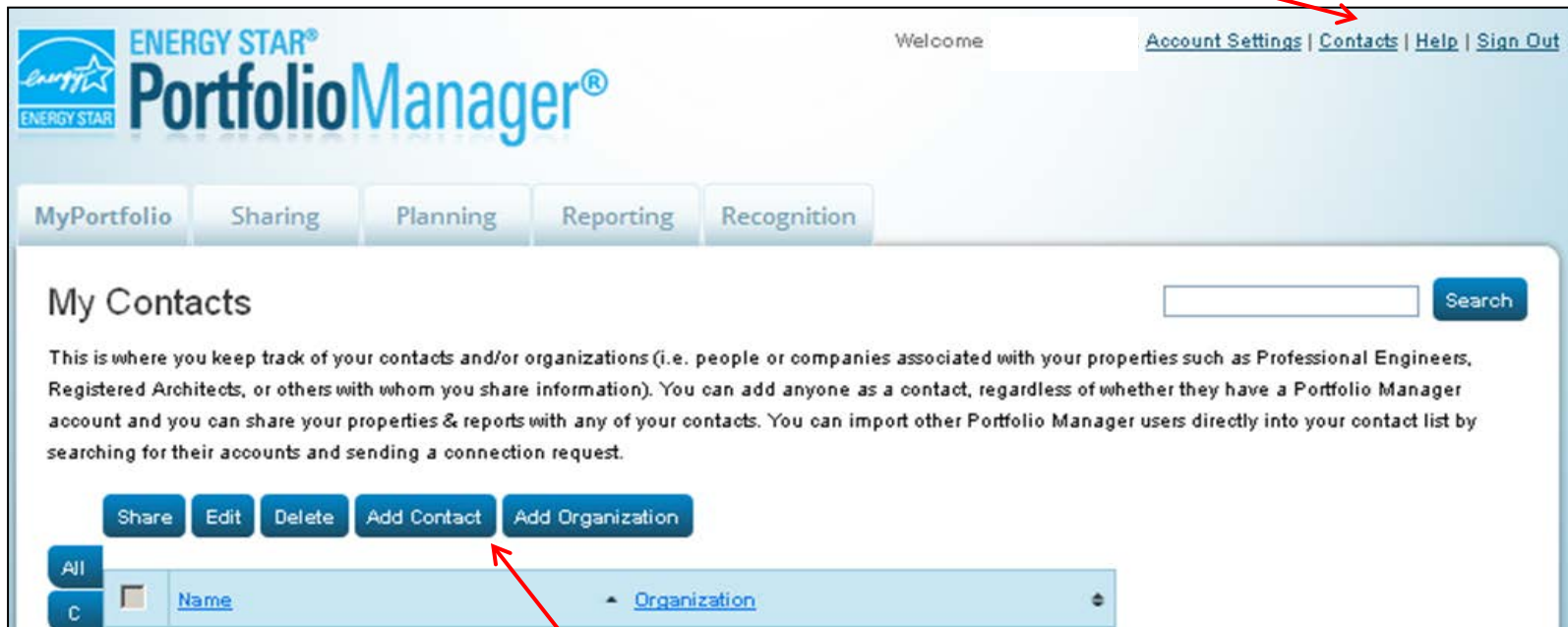
**Are you applying for recognition?**  
Although these reports look similar, if you are applying for either [ENERGY STAR certification](#) or [Designed to Earth recognition](#), you must generate the required documentation by way of the application process.

**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.

# Data Reports and Sharing

## Add Contacts

Portfolio Manager has the option to share data access with other individuals or organizations. To do so, you must first “connect” with a contact. Click “Contacts” in the upper-right corner of the screen.



Your contacts will be listed on this screen. Click “Add Contact.”

# Data Reports and Sharing

## Add Contacts

The screenshot displays two forms within a light gray border. The top form, titled "Find Contact in Portfolio Manager", includes a sub-header "Search using any of the criteria below" and three input fields labeled "Name:", "Username:", and "Email:". Below these fields are two buttons: "Search" and "Cancel". A red arrow points from the text on the right to the "Search" button. The bottom form, titled "Add New Contact", contains several fields: "First Name:" and "Last Name:" (both with red asterisks), "Job Title:", "Organization:" (with a dropdown menu and a red asterisk), "Country:" (with a dropdown menu and a red asterisk), "Street Address:" (with two stacked input fields and a red asterisk), "City/Municipality:" (with a red asterisk), "State/Province:" (with a dropdown menu and a red asterisk), "Postal Code:" (with a red asterisk), "Email:" (with a red asterisk), "Phone:" (with a red asterisk), and "Fax:". At the bottom, there are two checkboxes for "Professional Designations": "Professional Engineer (PE)" and "Registered Architect (RA)". A red arrow points from the text on the right to the "Add Contact" button at the bottom of this form.

There are two ways to add a contact. If the contact already has an account with Portfolio Manager, enter that individual's name, username, or email address, then click "Search."

If the individual does not have an account with Portfolio Manager, enter the individual's contact information. Be sure to include all of the required information, denoted by a red asterisk (\*). Then click "Add Contact."



# Data Reports and Sharing

## Share Data With Contacts

MyPortfolio **Sharing** Planning Reporting Recognition

My Shared Properties (48)  
Share a Property

**Exchanging Data**  
Did you know you can work with another organization to regularly upload your data into Portfolio Manager? You can authorize these companies to update your meters, manage building data, and retrieve metrics.  
To get started, [search for organizations that exchange data](#). Then connect with them and share your properties.  
[Learn more about exchanging data.](#)

Sharing Notifications (3)

<	<a href="#">Lansdowne- Firehouse</a> - Share accepted by <a href="#">Lansdowne Borough Municipal Operations</a>	Clear
<	<a href="#">Lansdowne- Borough Yard</a> - Share accepted by <a href="#">Lansdowne Borough Municipal Operations</a>	Clear
<	<a href="#">Lansdowne- 20th Century Club</a> - Share accepted by <a href="#">Lansdowne Borough Municipal Operations</a>	Clear

My Shared Properties (48)  
Sort by: Property Name Share a Property

	Name	Permissions	Action
>	<a href="#">12</a>	Full Access	
>	<a href="#">3.11 Test</a>	Full Access	
>	<a href="#">876</a>	Full Access	
>	<a href="#">a</a>	Full Access	
>	<a href="#">asd</a>	Full Access	

If the contact you would like to share data with has approved your connection request (see [Add Contacts](#) on page 28), you will then be able to share data with them. Click the “Sharing” tab.

Then, click “Share a Property.”

**Tip:** The buildings you have already shared will appear here. If you would rather view the contacts you have shared buildings with, select “Contact Name” in the drop-down menu.

# Data Reports and Sharing

## Share Data With Contacts

The screenshot shows a web interface with a navigation bar at the top containing 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. The main heading is 'Share Your Property(ies)'. Below the heading is a paragraph of introductory text. The interface is divided into two numbered steps:

**1 Select Properties to Share**  
We'll get into the details of the level of access later. For now, which properties do you want to share?  
- Select Number of Property(ies) -

**2 Select People (Accounts) to Share With**  
Which people (accounts) do you want to share these properties with? The access for each can be different and you'll be able to specify that on the next page.  
Select contacts from my contacts book:  
{  
|  
|  
|  
}

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your **connected contacts** appear in this list.

At the bottom right, there are two buttons: 'Continue' and 'Cancel'.

Red arrows in the image point to the dropdown menu in step 1, the list box in step 2, and the 'Continue' button.

This page will let you choose which buildings you would like to share and which contacts you would like to share them with.

Select how many buildings you would like to share: one, multiple, or all. If you select “One Property,” a drop-down list will appear. If you select “Multiple Properties,” a blue button will appear, which opens a pop-up window to select buildings.

Then, select which contacts you would like to share the data with. To select multiple contacts, hold the CTRL key and click on each selection.


Then, click “Continue.”

# Data Reports and Sharing

## Share Data With Contacts

### Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

**3**  Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Sort by:

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ <a href="#">12</a> (2645049)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
▼ <a href="#">3.11 Test</a> (2644621)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	
▼ <a href="#">314Test</a> (3069969)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	

[Share Property\(ies\)](#) [Cancel](#)

This page will allow you to select which level of access each of your contacts will have to each of your buildings. Hover your mouse cursor over each option to view detailed descriptions. If you select “Custom Access,” a pop-up window will appear with additional specifications.

When you are finished, click “Share Property(ies).”

# Portfolio Manager Guide

February 2014

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