

STEP 2

# Set Your Property Up in Portfolio Manager<sup>®</sup>

# Set Your Property Up in Portfolio Manager

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:

**Activate your account** within 24 hours.

We recommend using one Portfolio Manager per organization, to track all your buildings in one location, and account access can easily be managed with staff turnovers. If you already have an account, skip to the next page.

**Create a new account** in Portfolio Manager at [www.energystar.gov/portfoliomanager](http://www.energystar.gov/portfoliomanager).

- On the right side of the page, click **Create Account**.
- Do not use **ANY** special characters in your username (letters and numbers only).
- Keep a record of the username and password—you cannot change your username later. To recover a lost password click I forgot my password or submit an online [request form](#).
- Easily track all your buildings using just one Portfolio Manager account for your entire organization.



**For detailed instructions** Watch [Creating a Portfolio Manager Account and Entering Data](#) training video



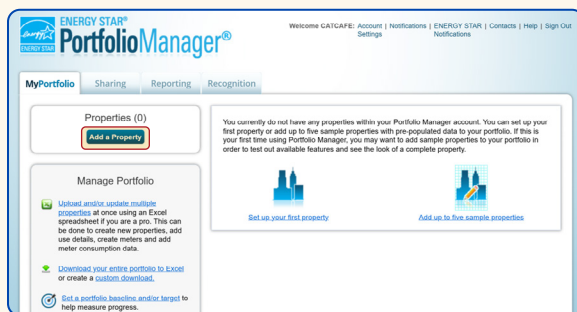
**Already have a Portfolio Manager Account?** Skip to the next page and proceed to add a new building to your organizations existing account.



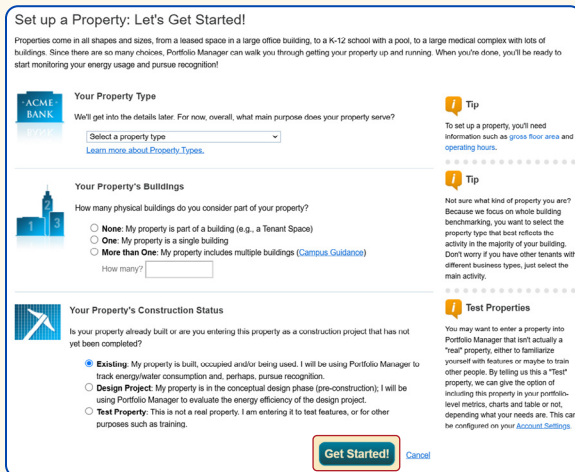
**Need Portfolio Manager account access due to staffing change?** See [Benchmarking Frequently Asked Questions](#)

Answer the basic questions about your organization.

- For Reporting Units, choose **Conventional EPA Units (e.g., kBtu/ft<sup>2</sup>)**.
- Choose **Yes** for “Can other people search for you and send a connection request?”, then click **Create My Account**.



After logging in with your new credentials, click **Add a Property**.



Make selections, then click **Get Started!**

After creating an account, you will get an activation email. **Verify your account as soon as possible**—the link will expire in 24 hours.

Once verified, login with your new credentials, then click on **Add a Property**.

- Select the primary property type.
- Select the number of buildings, typically “One: My property is a single building.” If the property is a set of buildings on a shared energy meter or central heating plant (except hospitals, senior care, or K–12 schools), please read EPA’s Guide: [How to Benchmark a Campus](#).
- For Your Property’s Construction Status, select **Existing**.
- Select **Get Started!**



In most cases *Portfolio Manager* defines a property as one building. The plural form, “properties” refers to a contiguous parcel, not all the properties that a person may own.



**Occupancy** is defined as the percent of building’s space that is leased.

**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:  Sq. Ft.  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:  Sq. Ft.

Occupancy:  %

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

**Do any of these apply?**

My property's energy consumption includes parking areas

My property has a heated swimming pool

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 nursing/assisted care units

Answer basic questions about your organization.

Enter basic property information including the building name, address, year built, occupancy, and gross floor area (not including parking). Under the **Do any of these apply?** section,

- Select **My property's energy consumption includes parking areas ONLY** if parking is jointly metered with the building it serves.
- **DO NOT** select **My property's energy consumption includes parking areas** if the parking area is on a separate meter.
- Check other options that apply.



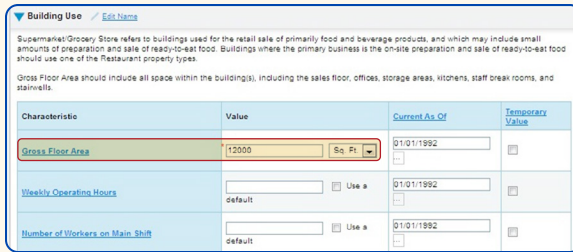
**For electric vehicle charging stations, see [EPA instructions](#) for how to account for EV charging in parking areas.**

Select **Continue**.

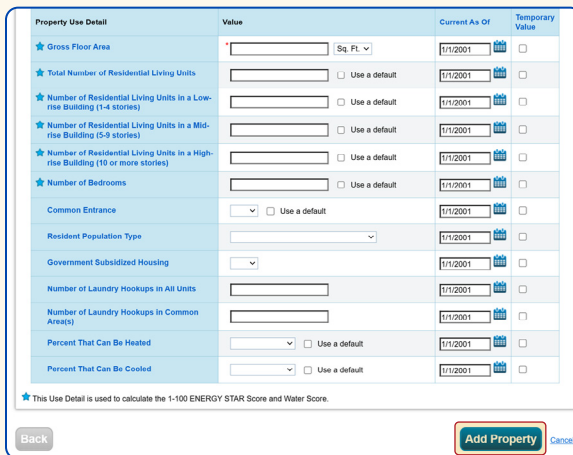


**For tips on how to enter parking details, see [Benchmarking Frequently Asked Questions](#)**

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**Provide the total square footage of any given space type.** Combine all retail square footage unless specific conditions require separation. If the same use type has differing weekly hours by more than 10% **AND** that use type is eligible for a score (e.g., two office tenants with significantly different operating hours), they must be listed separately..



Example of Multifamily Housing Property Use Details

Next, you'll enter details about the primary building use and other uses based on the boxes checked on the prior screen.

- The specific use details required will differ based on the property type selected. Refer to the [Property Use Details Worksheet for ENERGY STAR Eligible Buildings](#) for more information.
- Actual values for space details (i.e. operating hours, number of bedrooms, etc.) are required for reporting. **Do not use default values.**

The Gross Floor Area (GFA) that you entered when setting up your property will automatically populate into this section.

If your building has only one type of use, enter property use type and square footage, then select **Save**.

If your building contains multiple uses, **adjust this number** to reflect the actual GFA for the primary use, then select **Save**.



**Unsure which property type to use?** EPA has over 80 types of properties listed under broad categories. Visit the EPA website to see a full list of [property types eligible for Portfolio Manager](#).



**Default values**  
ENERGY STAR Portfolio Manager allows the use of default values for Property Use Details when precise use details are unknown while setting up a new property type. Since these default values are estimates, replace them with actual values prior to submitting your benchmarking report.



# Set Your Property Up in Portfolio Manager

Portfolio Manager: What data is required to benchmark your property?

You can benchmark almost any type of property in Portfolio Manager! The information required varies depending on the type of property and whether or not the property is eligible for an ENERGY STAR Score.

Pick your country and property type to get started.

Country: United States [Why is this needed?](#)

Property Type: Office

[+ Add Another Use Type](#)

You can look up more than one use type if needed. [Learn more about when to use different use types when setting up your property.](#)

[Lookup Required Data](#)

What Metrics Are Available?

All properties are eligible to receive metrics such as [Source EUI](#) by providing [Gross Floor Area](#) and 12 months of energy usage. The [ENERGY STAR Score](#) is available for specific property types and requires additional information. [Learn more about eligibility for the ENERGY STAR Score.](#)

**Data Collected for All Properties**

- Property Name
- Property Address
- Total Gross Floor Area of Property
- Irrigated Area
- Year Built/Planned for Construction Completion
- Occupancy
- Number of Buildings
- 12 consecutive months of energy data

**Additional Data Collected for Office**

The following information is required to get an ENERGY STAR Score ([if eligible](#)):

- Gross Floor Area
- Weekly Operating Hours
- Number of Workers on Main Shift
- Number of Computers
- Percent That Can Be Cooled

The following information is **optional** and not used to calculate a score; it may inform future analysis and score revisions by EPA and/or may help you manage and compare your properties:

- Percent That Can Be Heated

## Property Use Details

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

You have successfully edited the use details for Building Use.

Test Building

811 18TH, Seattle, WA 98104 [Map It](#)

Portfolio Manager Property ID: 38220092

Year Built: 2020 [Edit](#)

Not currently eligible for ENERGY STAR Certification [Why not?](#)

Weather Normalized Source EUI (kBtu/sq ft) [Why not?](#)

Current: N/A

Baseline: N/A

Summary **Details** Energy Water Wastes & Materials Goals Design

Basic Information

Construction Status: Existing property that is one single building

! Property GFA - Self-Reported: 50,000 Sq. Ft.

Occupancy: 100% [Edit](#)

Property Uses and Use Details

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

Name	Property Use Type	Gross Floor Area	Action
Building Use	Office	40,000 ft <sup>2</sup>	<a href="#">I want to...</a>
Custom Use Details			<a href="#">I want to...</a>

[Learn More](#)

! Property GFA (Buildings): 40,000 (used to calculate EUI)

Property GFA (Parking): 0

Alerts showing gross floor area error.

Enter additional details for each use in the building:

- Navigate to the **Details** tab.
- Select the use type from the drop-down menu, **Add Another Type of Use**.
- Enter the attributes and square footage for that use and click **Add**.
- After adding all the necessary information, click **Save Use**.

Repeat the above steps for each additional use type in the building.

After all use types have been entered, select **Save**.



Once your new property has been created, check the **Details** tab for alerts. If the gross floor area values in the **Basic Information** and **Property Uses and Use Details** sections are not the same, you will see red exclamation marks indicating the error.



**Spaces for restaurants, data centers, and laboratories must be entered as separate use types regardless of their square footages.**



**Secondary uses occupying under 5,000 SF** may be combined with the primary use except for those referenced above (restaurants, data centers, and laboratories).



**Vacancy**—space not leased and unconditioned—must be accounted for in your Portfolio Manager use types. See [Portfolio Manager Help](#) for how to adjust.