

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Overview

The Environmental Protection Agency's (EPA) ENERGY STAR® Portfolio Manager is a free online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions—all in a secure online environment.

Southern California Edison (SCE) has created this document to provide step-by-step instructions for registering to access energy usage data on Portfolio Manager to benchmark your buildings. Benchmarking enables you to compare your building's energy performance with that of similar buildings. All building types can be entered into Portfolio Manager, resulting in energy and water benchmark values.

Some buildings will also receive an ENERGY STAR score, indicating energy efficiency on a 1-100 scale, with 1 being low and 100 being high. A score of 75 or better indicates top performance, and means your building may be eligible to earn the ENERGY STAR label and recognition. For the building types that currently are not eligible to receive this score, EPA provides a list of reference energy performance targets which are based on the median energy use calculated across similar types of buildings.

Property/Building Registration Process

You begin the registration process by:

- Registering for a SCE.com account (if you do not already have one)
- Setting up your property(ies)/building(s).
- Identifying building tenants.

Once the registration process is complete on SCE.com, you receive an alpha-numerical Data Sharing Key. This key is entered when you set up your account in Portfolio Manager. The Data Sharing Key enables the building's energy usage data to transfer from SCE to Portfolio Manager. Initially, this will be the most recent 24 months of your building's electric energy use. Thereafter, monthly energy data will be added automatically.

This guide will walk you through the process of registering to benchmark your building(s) on SCE.com and on Portfolio Manager. SCE also offers free in-person benchmarking classes on how to use Portfolio Manager called **Benchmarking Energy Use in Buildings**. To register for the next class, visit:

<https://www.sce.com/wps/portal/home/business/Energy-Education-Center/>.

Links and Resources

- SCE's Benchmarking Website: www.sce.com/benchmarking
- SCE's Toll Free Technical Support Benchmarking Hotline: 855-SCE-INFO (855-723-4636)
- SCE Benchmarking Email: benchmarking@sce.com
- ENERGY STAR's Portfolio Manager Benchmarking Website: www.energystar.gov/benchmark
- For general ENERGY STAR Portfolio Manager questions visit www.energystar.gov/buildingshelp.
- For more information about compliance with the AB 802 Building Energy Benchmarking Program, visit <http://www.energy.ca.gov/benchmarking/>.

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Gather Data for Benchmarking

The gathering of required data to benchmark a building(s) is usually the most laborious of all steps, as well as the step that requires the most accuracy. Incorrect data may lead to incorrect benchmarking results. This section outlines some of the information you will need to register your property(ies) and building(s).

Property Information

- A. Identify the property(ies) and the number of buildings on each property.
- B. Note each property's name, street address, ZIP/postal code, year property was built.

Building Information

- A. Note the street address and ZIP/postal code of each building on the property. If a building is part of a multi-family dwelling, do not include apartment or unit numbers.
- B. Identify the building type (e.g., commercial or residential) for each building on the property.
- C. Identify the number of tenants in each building on the property.
- D. Gross floor area in square feet of each building on the property.
- E. Property use details (e.g., weekly operating hours, number of computers, number of workers on the main shift, etc.) that are specific to the property. See <http://www.energystar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details> for specific data needed for your property type.

Other Information

- A. Collect the additional information you may need to complete the registration process.
 - **Email Address**
Unless otherwise specified, SCE will use your Primary Email Address to communicate with you during the registration process. When sharing the SCE.com account with others for benchmarking purposes, it is advisable to set up a unique User ID and Password – one that is not associated with an individual.

If you have any questions, call SCE's Toll Free Technical Support Benchmarking Hotline: 855-SCE-INFO (855-723-4636) or email benchmarking@sce.com.

You now have all the information you need to benchmark your building. Proceed to Step 2.

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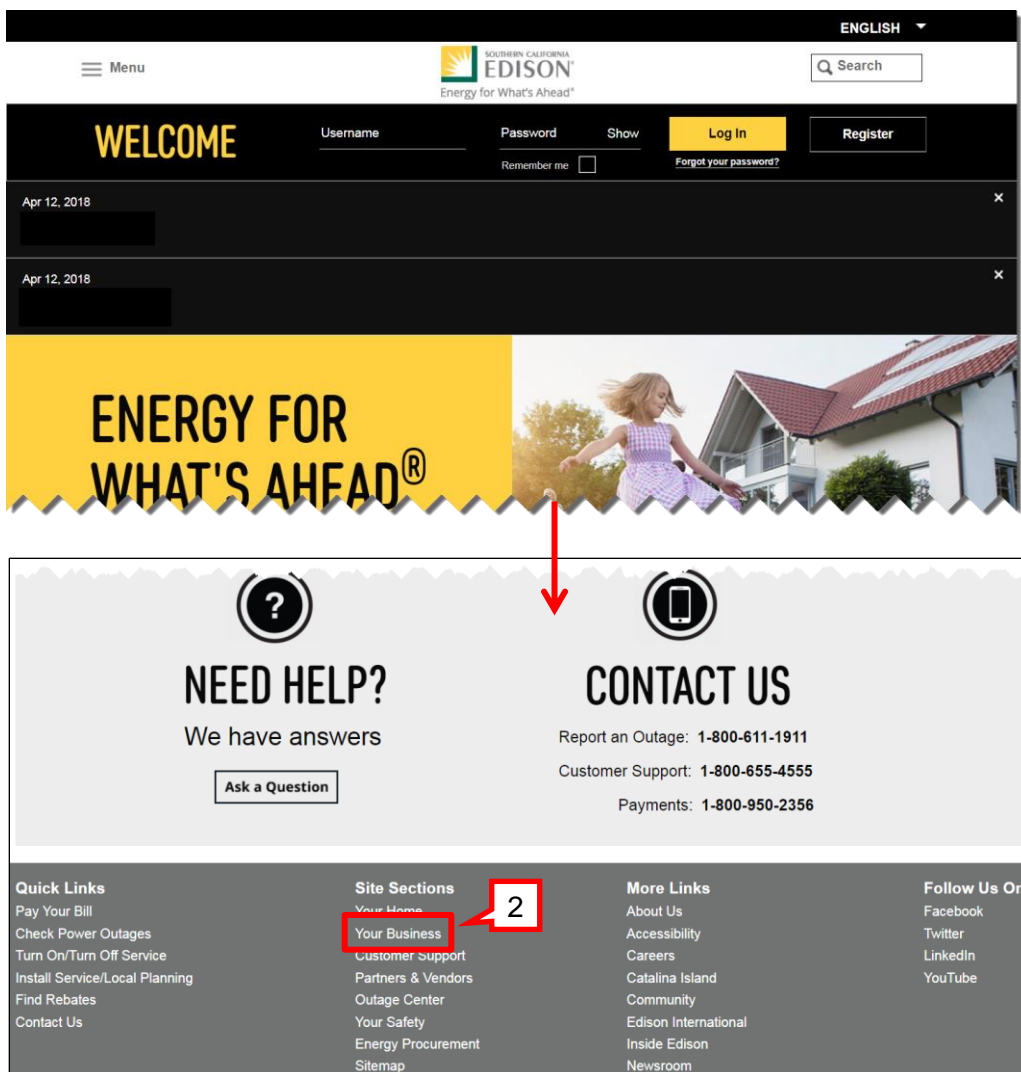
Create a SCE.com Account (if you do not have one)

NOTE

All screen shots are shown below the text describing the screen.

Tip: If you have the ability to have two screens on your computer open at the same time, keep this step by step guide open while you enter information on SCE.com and in the Portfolio Manager.

1. Open **SCE.com**.
The SCE.com Home page displays.
2. Scroll down to the bottom and click **Your Business**.

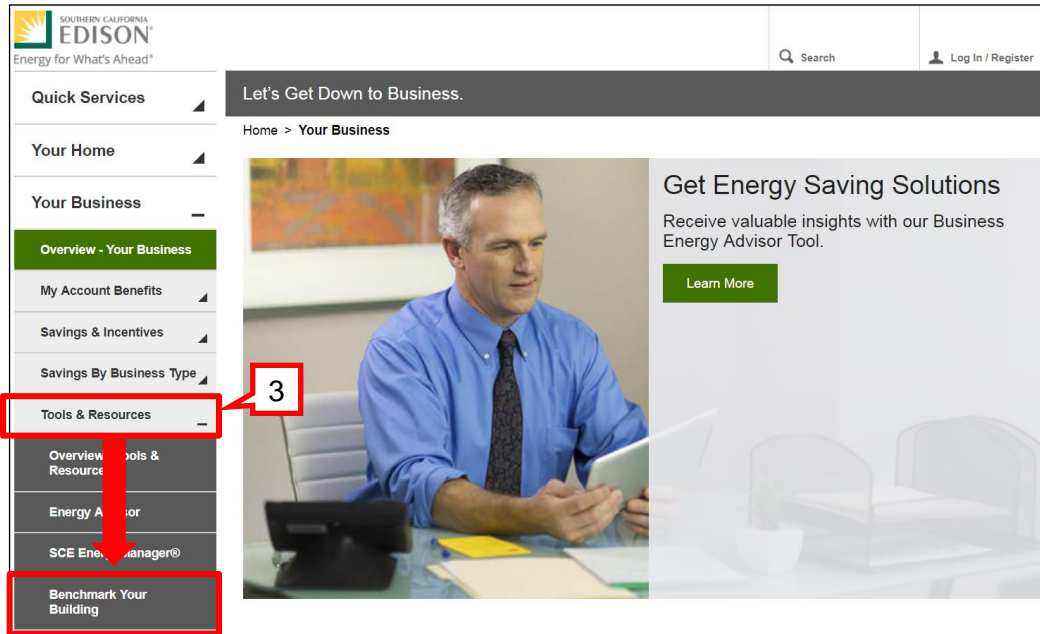


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Step 2: Create a SCE.com Account

3. In the navigation section, go to **Tools & Resources > Benchmark Your Building**.



The Benchmarking landing page displays that guides you through the registration process.



You must be registered on SCE.com first before beginning the Benchmarking Portal registration process.

Going forward, references to a building owner include a consultant/agent acting on behalf of the owner.

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Step 2: Create a SCE.com Account

- 3a. If you have an SCE.com account, **Log In** and proceed to the next section, **Step 3: Enter Property/Building Information**, on page 9.
- 3b. If you do not have a SCE.com account, click **Register Now** and complete the registration process by proceeding to 4 on page 6 after reading the Note below.

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Energy for What's Ahead®

Search Log In / Register

Benchmark Your Building

Home > Your Business > Tools & Resources > **Benchmark Your Building**

What is Benchmarking?

Benchmarking is a no cost way to measure your building's energy performance and compare it to other buildings using the **ENERGY STAR® Portfolio Manager®**.

The Portfolio Manager will score your building from 1 to 100, allowing you to track energy use and verify improvements for building managers, contractors and tenants.

Getting Started

Log in to start setting up your properties and buildings. If you don't already have an account, click Register Now to begin. Once complete, enter the Data Sharing Key into your ENERGY STAR® Portfolio Manager® account to begin receiving automatic uploads of your building's aggregated energy usage data. Data is typically uploaded within 48 hours.

Log In

User ID / Email

Password

Forgot your password? [Reset Password](#)

Create New Account

[Register Now >](#)

When registering for an SCE.com Benchmarking account, you are directed to a page that enables you to set up a User ID and Password.

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Step 2: Create a SCE.com Account

4. Enter your **First** and **Last Names**.

Tip: It is recommended that you set up a unique User ID (email) and password when sharing the account. Use an email address that is both shared and checked frequently and a password that can be shared. Also, ensure that the email address you plan to use has not been previously registered as a SCE.com user ID.

5. Enter an **Email Address**.
6. Enter a **Password**.
7. Confirm your new **Password**.
8. Click **Next**.

The screenshot shows the 'User Registration' page for SCE.com. At the top, there is a header with the Southern California Edison logo and a search bar. Below the header, there are two tabs: 'Provide Info' (selected) and 'Verify Email'. The main heading is 'Register a New SCE.com User ID for Benchmarking'. The form is divided into two sections: 'Enter Your Name' and 'Create a User ID'. The 'Enter Your Name' section has two input fields for 'First' and 'Last' names, both with green checkmarks. The 'Create a User ID' section has three input fields: an email address, a password, and a confirmation password. The email field has a green checkmark. The password and confirmation fields have 'Show' buttons and green checkmarks. A red box highlights the entire form area. Numbered callouts point to specific elements: 4 points to the 'First' name field, 5 points to the email field, 6 points to the password field, 7 points to the confirmation password field, and 8 points to the 'Next >' button at the bottom right. A 'Cancel x' button is located at the bottom left of the form area.

The Terms and Conditions window displays.

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A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 2: Create a SCE.com Account

9. Read the **Terms and Conditions**, and then click **I have read and agreed** button.

Terms & Conditions [Print](#)

1. General & Eligibility.

- SCE's online Automated Benchmarking Service allows SCE to electronically upload your building's aggregated energy usage, as well as to view, create, access and modify such data in the Environmental Protection Agency (EPA) Portfolio Manager database.
- To use this service, you understand that you must be the building owner or the authorized representative of the building owner of the buildings designated ("Buildings"), and you may be required to provide proof of Building ownership prior to accessing data. You represent that you are the owner, or authorized representative of the owner, of these Buildings.
- As part of your use of the Automated Benchmarking Service, you will be asked to provide certain information to SCE. You agree to provide accurate and complete information.

Cancel X **I have read and agree >**

The Check Your Email page displays.

Check Your Email! Your Registration is Pending

Provide Info **Verify Email**

A verification email has been sent to:
jones@1234567890@gmail.com

Please click the link in that email to verify your email address and complete your registration.

Your Details

| | |
|------------|----------------------------|
| First Name | First |
| Last Name | Last |
| Email | jones@1234567890@gmail.com |

10. Open your email account, and click the link provided to verify your email address.



If you do not verify your email address within 24 hours, your SCE.com User ID registration will be canceled.

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Step 2: Create a SCE.com Account

Once the link is clicked in your email, you are directed to the Benchmarking login page.

11. Log In.

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Quick Services ▾

Your Home ▾

Your Business ▾

Overview - Your Business

My Account Benefits ▾

Savings & Incentives ▾

Savings By Business Type ▾

Tools & Resources ▾

Overview - Tools & Resources

Energy Advisor

SCE EnergyManager®

Benchmark Your Building

Interest Free Energy Efficiency Financing

Mobilehome Park Utility Upgrade Program

Benchmark Your Building

Home > Your Business > Tools & Resources > **Benchmark Your Building**

What is Benchmarking?

Benchmarking is a no cost way to measure your building's energy performance against the **ENERGY STAR® Portfolio Manager®**.

The Portfolio Manager will score your building from 1 to 100, allowing you to compare your building's performance to building managers, contractors and tenants.

Getting Started

Log in to start setting up your properties and buildings. If you don't already have a Data Sharing Key, complete, enter the Data Sharing Key into your ENERGY STAR® Portfolio Manager® and upload your building's aggregated energy usage data. Data is typically uploaded monthly.

Log In

✓

✓

Forgot your password? [Reset Password](#)

☐ Remember Me

[Log In](#) >

11

OR

The Benchmarking Dashboard displays.

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Profile | Data Sharing | Overview

My Account ▾

Profile ▾

Data Sharing ▾

Data Sharing Overview

Authorize A Third Party

Benchmarking Dashboard

Overview

Benchmarking Dashboard

Home > MySCE > Data Sharing > **Benchmarking Dashboard**

Benchmarking Dashboard

Use this dashboard to create and manage all the properties and buildings whose usage data you want to have automatically uploaded to ENERGY STAR® Portfolio Manager®.

[Add Property](#) What's this? >

You have no properties or buildings entered.

Quick Services ▾

Your Home ▾

Your Business ▾

Customer Support ▾

Partners & Vendors ▾

Outage Center ▾

Safety ▾

Looking for more information? ▾

Contact Us ▾

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Step 2: Create a SCE.com Account

NOTE

If you have an SCE.com account but have not completed the Benchmarking Registration process, navigate to the Benchmarking Log In page as described in 1-2, Log In, and continue the registration process.

If you have registered to benchmark your Property/Building(s) previously and have not read and accepted the Updated Benchmarking Terms and Conditions, you will do the following:

1. **Log In.**

The Updated Benchmarking Terms & Conditions display.

2. Read the **Updated Benchmarking Terms and Conditions** (click the **Show More** button to see all Terms and Conditions).

3. Check the box next to **I have read and agree to the Terms and Conditions.**

4. Click **Next**.

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Billing & Payments | Usage & Energy Management | Profile | Device Management | Data Sharing | Overview

Updated Benchmarking Terms and Conditions

We've Updated our Benchmarking Terms & Conditions

Please review and agree to the SCE Terms & Conditions for benchmarking.

Terms and Conditions Print

1. **General & Eligibility.**

- SCE's online Automated Benchmarking Service allows SCE to electronically upload your building's aggregated energy usage, as well as to view, create, access and modify such data in the Environmental Protection Agency (EPA) Portfolio Manager database.

Show More ▾

☒ I have read and agree to the Terms & Conditions. ✓

Cancel x Next >

Clicking Next directs you to the Benchmarking Dashboard.

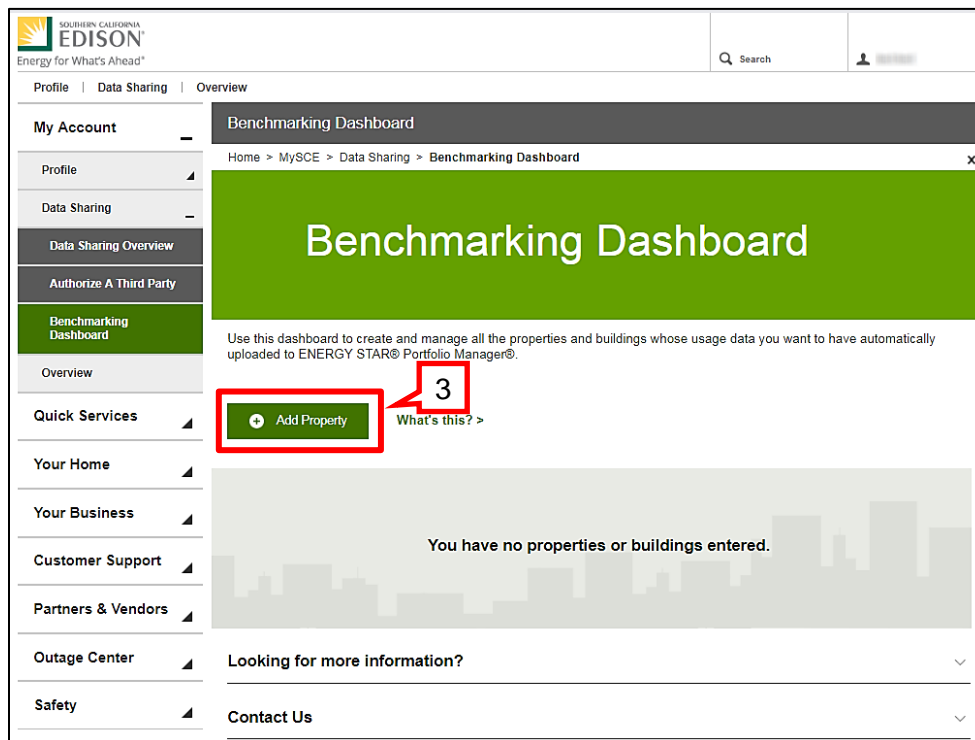
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Enter Property/Building Information

1. If not logged into SCE.com go to **Your Business > Tools & Resources > Benchmark Your Building**.
2. **Log In** with your SCE.com **User ID** and **Password**.
The Benchmarking Dashboard displays.
3. Click **Add Property**.



The Add Properties & Buildings window displays.

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A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 3: Enter Property/Building Information

Note the reminder that data cannot be shared for buildings with less than 5 tenants if any tenant is residential.

4. Enter the **Property Name**.
5. Click **Next**.

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Profile | Data Sharing | Overview

Add Properties & Buildings

1 — 2 — 3

Add Property

! Data cannot be shared for buildings with less than 5 tenants if any tenant is residential.

Property Name What is this? >

XYZ Property

Cancel x

< Previous **Next >**

The next window that displays shows the property entered and provides a button to Add a Building(s).

6. Click **Add A Building**.

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Profile | Data Sharing | Overview

Add Properties & Buildings

✓ — 2 — 3

Add Buildings

Property: XYZ Property

No buildings added yet.

Cancel x

< Previous **Add A Building** Next

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Step 3: Enter Property/Building Information

The Add Buildings window displays.

NOTE

Beginning in 2018 and annually thereafter, a covered commercial building that has more than 50,000 square feet of gross floor area and no active residential utility accounts must register due to the AB 802 Public Disclosure requirement.

Beginning in 2019 and annually thereafter, a covered building where there are 17+ residential active utility accounts and more than 50,000 square feet of gross floor area must register due to the AB 802 Public Disclosure requirement.

The data obtained for covered buildings that are required to register must be reported to the Energy Commission.

7. Enter a **Building Name**.
8. Click **Yes** if you are . . . **adding this building to comply with the Building Energy Use Benchmarking and Public Disclosure Program**. Click **No** if not.
9. Click **Add This Building**.

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Profile | Data Sharing | Overview

Add Properties & Buildings

✓ 2 3

Add Buildings

Property: XYZ Property

No buildings added yet.

Building Name What is this? >
Building 1 ✓

Are you adding this building to comply with the Building Energy Use Benchmarking and Public Disclosure Program?
☒ Yes ✓
☐ No

Cancel x + Add This Building

The next window displays the added building to the property.

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Step 3: Enter Property/Building Information

10. Continue adding buildings to the property by clicking **Add Another Building**, or click **Next** when finished adding buildings.

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Profile | Data Sharing | Overview

Add Properties & Buildings

✓ 2 3

Add Buildings

Property: XYZ Property

Building(s) added to this property:

Building 1 X

Cancel x

+ Add Another Building

< Previous Next >

10

After clicking Next, the Enter Addresses window displays.

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Step 3: Enter Property/Building Information

Add Building Addresses

The following instructions provide a guide to entering addresses for buildings.

- ◆ **Buildings with multiple addresses:** Enter each address that applies to the building. Example: A commercial building with unique addresses for each business renting space (e.g., 123 Any Street, 125 Any Street, 127 Any Street).



- ◆ **Buildings with multiple units or apartments:** Enter one address for each building without identifying tenant units or apartments. Example: An apartment building with multiple units (e.g., 123 Any Street instead of 123 Any Street, Unit A, 123 Any Street, Unit B). You can select the tenants that live at the specified address. You do not need to identify the address for the individual units.



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Step 3: Enter Property/Building Information

- ◆ Apartment complexes with multiple buildings: **Enter addresses for each building in the complex, but not the units within a building.** Example: An apartment complex with 26 buildings, each with 12 units – addresses are entered for the buildings (e.g., 123 Any Street Bldg R, 123 Any Street Bldg S, etc.) but not the individual units. Tenants are selected based on the building address.



- ◆ Buildings with both multiple addresses and units or apartments: **Enter the unique address(es) separately and the units or apartments under one address.** Example: A high-rise apartment complex with multiple dwellings (one address) and cleaners, deli, and pharmacy within the building, each with different unique addresses (e.g., dwellings: 123 Any Street; businesses: 124 Any Street, 125 Any Street, and 126 Any Street).



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Step 3: Enter Property/Building Information

11. Click **Add An Address**.

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Profile | Data Sharing | Overview

Add Properties & Buildings

✓ ✓ 3

📍 **Enter Addresses**
You will be unable to add or edit addresses after this step.

If you are having trouble locating an address in our system, please refer to the Service Address located on the customer's SCE bill. For additional help please contact us before completing this step.

Property: XYZ Property

Add all addresses associated with your property

Cancel x

< Previous Submit

11

The Enter Addresses window displays.

12. Enter the **Zip Code** for the Property.
13. Click **Next**.

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Profile | Data Sharing | Overview

Add Properties & Buildings

✓ ✓ 3

📍 **Enter Addresses**
You will be unable to add or edit addresses after this step.

If you are having trouble locating an address in our system, please refer to the Service Address located on the customer's SCE bill. For additional help please contact us before completing this step.

Property: XYZ Property

Add all addresses associated with your property

Enter ZIP Code
91730 ✓

Cancel x

< Previous Next >

12

13

Understanding Your Building's Energy Performance

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Step 3: Enter Property/Building Information

The next window that displays enables you to enter the Street Number and Name.

14. Enter the **Street Number** and **Street Name**.

15. Click **Next**.

The screenshot shows the Edison 'Enter Addresses' form. At the top, there's a progress bar with three steps: the first two are marked with green checkmarks, and the third is marked with a green circle containing the number 3. Below the progress bar, the heading 'Enter Addresses' is followed by a warning: 'You will be unable to add or edit addresses after this step.' A note below that says: 'If you are having trouble locating an address in our system, please refer to the Service Address located on the customer's SCE bill. For additional help please contact us before completing this step.' The form contains a 'Property: XYZ Property' label, a map area with the text 'Add all addresses associated with your property', and a section titled 'Now, enter the street number and street name:'. This section has two input fields: the first contains '44444' with a green checkmark, and the second contains 'Any Street' with a green checkmark. Below these fields, the 'ZIP Code: 91730' is displayed. At the bottom, there are three buttons: 'Cancel x', '< Previous', and 'Next >'. A red box highlights the 'Now, enter the street number and street name:' section, with a callout '14' pointing to it. Another red box highlights the 'Next >' button, with a callout '15' pointing to it.

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Profile | Data Sharing | Overview

Add Properties & Buildings

Enter Addresses

You will be unable to add or edit addresses after this step.

If you are having trouble locating an address in our system, please refer to the Service Address located on the customer's SCE bill. For additional help please contact us before completing this step.

Property: XYZ Property

Add all addresses associated with your property

Now, enter the street number and street name:

44444 ✓ Any Street ✓

ZIP Code: 91730

Cancel x < Previous Next >

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Step 3: Enter Property/Building Information

NOTE

If the street number or name entered does not match one that actually exists, clicking Next will display a drop-down field from which to select the correct address.

The screenshot shows the SCE Portfolio Manager interface. At the top, the SCE logo and 'Energy for What's Ahead' tagline are visible. Below the logo, there are tabs for 'Profile', 'Data Sharing', and 'Overview'. A dark grey bar contains the text 'Add Properties & Buildings'. A progress indicator shows three steps, with the third step (a green circle with the number 3) being the active one. The main heading is 'Enter Addresses', followed by a warning: 'You will be unable to add or edit addresses after this step.' Below this, a text box says 'Property: XYZ Property'. A map area is labeled 'Add all addresses associated with your property'. The main form section is titled 'Now, enter the street number and street name:'. It contains a text input for the street number with '44444' entered and a green checkmark icon. Next to it is a text input for the street name with 'ANY STREET' entered. Below these is a dropdown menu, which is highlighted with a red rectangle; it shows a list of address suggestions and a green checkmark icon. At the bottom of the form, the 'ZIP Code: 91730' is displayed. There are 'Cancel x' and '< Previous' buttons on the left, and a 'Next >' button on the right.

Once the correct address is selected and you click Next, a window displays for you to confirm the address.

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Step 3: Enter Property/Building Information

You can click the **Incorrect Address?** button to edit the address if needed.

16. If the address is correct, click **Next**.

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Profile | Data Sharing | Overview

Add Properties & Buildings

Enter Addresses

You will be unable to add or edit addresses after this step.

If you are having trouble locating an address in our system, please refer to the Service Address located on the customer's SCE bill. For additional help please contact us before completing this step.

Property: XYZ Property

Add all addresses associated with your property

Is this the correct address, select "Next" to continue.

RANCHO CUCAMONGA CA 91730

Incorrect Address?

Cancel x

< Previous

Next >

16

After adding an address, you are returned to the window where you can click **Add Another Address**, if applicable.

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Energy for What's Ahead

Profile | Data Sharing | Overview

Add Properties & Buildings

Enter Addresses

You will be unable to add or edit addresses after this step.

If you are having trouble locating an address in our system, please refer to the Service Address located on the customer's SCE bill. For additional help please contact us before completing this step.

Property:

Addresses added to this property:

Add An Address

Cancel x

< Previous

Submit >

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Step 3: Enter Property/Building Information

17. Add any additional property/building addresses as applicable.
18. Click **Submit** when finished adding addresses.

Enter Addresses
You will be unable to add or edit addresses after this step.

If you are having trouble locating an address in our system, please refer to the Service Address located on the customer's SCE bill. For additional help please **contact us** before completing this step.

Property: XYZ Property

Addresses added to this property:

| | | |
|------|-----------------------|---|
| 9406 | CONFIRM - CANNOT EDIT | X |
| 9407 | CONFIRM - CANNOT EDIT | X |

17 Add An Address

Cancel x < Previous **Submit >** **18**

NOTE

A Building(s) and/or Address(es) can be removed as desired by clicking the **X** next it in the building and/or address confirmation window.

Enter Addresses
You will be unable to add or edit addresses after this step.

If you are having trouble locating an address in our system, please refer to the Service Address located on the customer's SCE bill. For additional help please **contact us** before completing this step.

Property: XYZ Property

Addresses added to this property:

| | | |
|------|-----------------------|---|
| 9406 | CONFIRM - CANNOT EDIT | X |
| 9407 | CONFIRM - CANNOT EDIT | X |

+ Add An Address

Cancel x < Previous Submit >

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Step 3: Enter Property/Building Information

Once all property/building addresses have been entered and submitted, the Property Profile Confirmation window displays.

19. Click **Return to Dashboard**.

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Profile | Data Sharing | Overview

Property Profile Confirmation

Your property profile has been saved.

Please return to the Dashboard to begin assigning tenants to each of the buildings you have just created.

Property

| | |
|----------------------|---|
| Property Name | XYZ Property |
| Property ID | 3389 |
| Buildings Added | 2 |
| Associated Addresses | 9406 [REDACTED] RANCHO CUCAMONGA, CA 91730 |
| | 9407 [REDACTED] RANCHO CUCAMONGA, CA 91730 |

[Return to Dashboard >](#)

The Benchmarking Dashboard displays. Note that you can continue to add a Property or Building as required. Also note that Action is Required (**Add Tenants**) for each building to complete the registration. Adding tenants is described in Step 4 beginning on the next page.

My Account

- Profile
- Data Sharing
- Data Sharing Overview
- Authorize A Third Party
- Benchmarking Dashboard**
- Overview

Quick Services

- [Add Property](#) What's this? >

Your Home

Your Business

Customer Support

Partners & Vendors

Outage Center

Safety

Benchmarking Dashboard

Use this dashboard to create and manage all the properties and buildings whose usage data you want to have automatically uploaded to ENERGY STAR® Portfolio Manager®.

[Add Property](#) What's this? >

XYZ Property
ACTION REQUIRED
RANCHO CUCAMONGA, CA 91730 2 Buildings

[Add Building](#) What's this? >

Building 1
ACTION REQUIRED
0 Meters
[Add Tenants >](#)

Building 2
ACTION REQUIRED
0 Meters
[Add Tenants >](#)

Close X

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Building Tenant Set-up

Tenant Authorization (if required)

Commercial buildings with fewer than three (3) tenants need tenant consent before the registration process can be completed.

NOTE

At this time, residential buildings with fewer than five (5) tenants cannot register to benchmark data via Portfolio Manager.

Also, mixed use buildings with fewer than five (5) residential tenants cannot register to benchmark data via Portfolio Manager.

If Tenant Authorization is required, a button is provided on the Data Sharing Key confirmation page to download an Authorization Form. This form can be given to your tenant(s). A link to instructions on completing the form is also provided.

You will still receive a Data Sharing Key for each building set up and can create and set up an account in Portfolio Manager for each building, but no data will be shared until all authorization forms are received and approved.

If Tenant Authorization is not required, you will not see the button and link.

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Step 4: Building Tenant Set-up

This section outlines the steps for setting up tenants in the Benchmarking Portal. If not logged in, navigate to the **Benchmark Your Building** log in page on SCE.com, and **Log In**.

The Benchmarking Dashboard displays.

1. On the **Benchmarking Dashboard**, click the down-arrow next to a Property to display its buildings.

There may be multiple property blocks with their associated buildings, depending on the number of properties and buildings you set up in the previous Step.

2. In one of the building blocks, click **Add Tenants**.

The screenshot shows the Benchmarking Dashboard interface. On the left is a sidebar with navigation links: My Account, Profile, Data Sharing, Data Sharing Overview, Authorize A Third Party, Benchmarking Dashboard, Overview, Quick Services, Your Home, Your Business, Customer Support, Partners & Vendors, Outage Center, and Safety. The main content area is titled 'Benchmarking Dashboard' and includes a breadcrumb trail: Home > MySCE > Data Sharing > Benchmarking Dashboard. Below the title is a green banner with the text 'Use this dashboard to create and manage all the properties and buildings whose usage data you want to have automatically uploaded to ENERGY STAR® Portfolio Manager®.' Below this is a section for 'XYZ Property' (RANCHO CUCAMONGA, CA 91730) with a red 'ACTION REQUIRED' status. It shows '2 Buildings' and an 'Add Building' button. Below the property block are two building blocks: 'Building 1' and 'Building 2', both with red 'ACTION REQUIRED' status and '0 Meters' energy usage. Each building block has an 'Add Tenants >' button. A red box highlights the 'Add Tenants >' button for Building 1, and a red circle highlights the up/down arrow icon next to the property block. Red callout boxes with numbers 1 and 2 point to these elements respectively.

NOTE

Blocks are color-coded: red means that action is required, and green means no action is required.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 4: Building Tenant Set-up

The *Select Tenants* window displays.

- Expand the applicable address block to see all tenants and their meters associated with the address.

EDISON Energy for What's Ahead

Profile | Data Sharing | Overview

Select Tenants

Select Tenants
Assign tenants to your building(s).

Building 1
Meters Selected: 0

Done

Select tenants per address:

9406 [Expand/Collapse Arrow] [Select All Displayed]

| | Unit | Meter | ACTIVE |
|--------------------------|------------|-----------|--------|
| <input type="checkbox"/> | XXXXXXXXXX | *****1608 | ACTIVE |

9407 [Expand/Collapse Arrow]

Cancel x

The expanded address displays a list of all building tenants at the address.

- Check the boxes next to each tenant (Active and Inactive), or check the **Select All Displayed** checkbox if all tenants displayed are associated with the building.
- Click **Done**.

Select Tenants

Home > MySCE > Data Sharing

Select Tenants
Assign tenants to your building(s).

XYZ Property
Meters Selected: 25

Done

Select tenants per address:

9406 [Expand/Collapse Arrow] [Select All Displayed] [Checkmark]

| | | | | |
|-------------------------------------|------------|----------|----------------|--------|
| <input checked="" type="checkbox"/> | XXXXXXXXXX | Unit 108 | Meter: *****46 | ACTIVE |
| <input checked="" type="checkbox"/> | XXXXXXXXXX | Unit 209 | Meter: *****73 | ACTIVE |
| <input checked="" type="checkbox"/> | XXXXXXXXXX | Unit 206 | Meter: *****22 | ACTIVE |
| <input checked="" type="checkbox"/> | XXXXXX | Unit 205 | Meter: *****23 | ACTIVE |
| <input checked="" type="checkbox"/> | XXXXXXXXXX | Unit 112 | Meter: *****72 | ACTIVE |

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 4: Building Tenant Set-up

NOTE

The example below displays multiple tenants for the address. **Only select the tenants associated with the specific address.**

If there is a long list of tenants associated with the address, click the **Next** link at the bottom to display additional tenants.

| | | | |
|-------------------------------------|----------|-----------------|--------|
| <input checked="" type="checkbox"/> | Unit 105 | Meter: ***** 20 | ACTIVE |
| <input checked="" type="checkbox"/> | Unit 216 | Meter: ***** 22 | ACTIVE |
| <input checked="" type="checkbox"/> | Unit | Meter: ***** 78 | ACTIVE |

< Previous **Next >**

If **Select All Displayed** is checked for the first group displayed in a long list, you will need to check it again when displaying each additional group.

The Data Sharing confirmation page displays.

Each building that is registered will receive a unique key. The **Data Sharing Key** enables SCE to transfer the building data to Portfolio Manager. **You access your building energy usage data in Portfolio Manager.**

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 4: Building Tenant Set-up

6. Click **Return to Dashboard**.

SOUTHERN CALIFORNIA EDISON
Energy for What's Ahead®

Profile | Data Sharing | Overview

Data Sharing Key

You have successfully mapped meters to your building.

Next Step
You can now enter the following Data Sharing Key for this building into your ENERGY STAR® Portfolio Manager®. You can find your Data Sharing Key at any time on your Benchmarking Dashboard.

0DYDTT7URR [How to add your Data Sharing Key to Portfolio Manager >](#)

Property

| | |
|-----------------|--------------|
| Property Name | XYZ Property |
| Property ID | 3048 |
| Buildings Added | 2 |

Buildings

| | |
|------------------------------|------------|
| Building Name | Building 1 |
| SCE Building ID | 3411 |
| Public Disclosure Compliance | No |

[Return to Dashboard >](#) **6**

The Dashboard shows that Action is Required – the Data Sharing Key is entered in Portfolio Manager.

XYZ Property
ACTION REQUIRED RANCHO CUCAMONGA, CA 91730 2 Buildings

[Add Building](#) [What's this? >](#) [Edit](#)

Building 1
ACTION REQUIRED 5 Meters

[Enter Data Sharing Key >](#) ←

NOTE The Data Sharing Key should be entered into Portfolio Manager as soon as possible. This will ensure that data sharing will begin promptly once the authorization forms are approved.

If the building has three or more commercial tenants or five or more residential tenants, tenant consent is not required to share building electrical data.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 4: Building Tenant Set-up

Tenant Authorization Form

Authorization Forms are only necessary when a commercial building has fewer than three (3) tenants, none of whom are residential.

If required, an Authorization Form is provided for each tenant. Each form can be downloaded and given to your tenants to complete and sign.

Submit all completed [Authorization Forms](#) via email to 3rdparty@sce.com.

For help filling out and submitting authorization forms, please refer to the [Authorization Form Instructions](#) posted below the form in the Benchmarking Portal.

The Authorization Form is designed to protect the privacy rights of SCE's customers. Any alterations to the form after it has been executed by a customer will render it null and void.

If tenant consent is required, you will need to complete the following steps.

NOTE

Users logged in with a linked account can skip to step 10.

7. Once tenants are selected and you click the **Done** button, you are prompted to provide a **Customer Account (CA)** number, if you have one. [If you click Yes, proceed to 8a below. If you click No, proceed to 8b on page 27.](#)
- 8a. Click **Yes** to link your CA Number to the building and enter your **Customer Account Number** and **Billing Zip Code**.
- 9a. Click **Next**.

The screenshot shows the Edison 'Link Your Customer Account Number' form. The left sidebar contains navigation links: Profile, Data Sharing, Overview, My Account, Profile, Data Sharing, Data Sharing Overview, Authorize A Third Party, Benchmarking Dashboard, Overview, Quick Services, Your Home, Your Business, Customer Support, Partners & Vendors, Outage Center, and Safety. The main content area is titled 'Customer Account Information' and includes a 'Property' field, a question 'Do you already have an SCE Customer Account Number?', and a 'Why are we asking this?' section. The 'Yes' radio button is selected. Below this are input fields for 'Customer Account Number (2-XX-XXX-XXXX)' and 'Billing ZIP Code(#####)'. At the bottom, there is a 'No, I don't have one' radio button, a 'Cancel x' button, and a 'Next >' button. Red callout boxes with numbers 7, 8a, and 9a point to the 'Link Your Customer Account Number' header, the 'Yes' radio button and input fields, and the 'Next >' button respectively.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 4: Building Tenant Set-up

If you click **No** when prompted to link your Customer Account Number, SCE will create a Customer Account Number for you.

- 8b. If **No** is selected, enter your **Title**, **Phone Number**, select the **Type of Phone**, and enter your **Tax ID**.
- 9b. Click **Next**.

The screenshot shows the Edison 'Link Your Customer Account Number' page. The sidebar on the left contains navigation links: Profile, Data Sharing, Overview, My Account, Profile, Data Sharing, Data Sharing Overview, Authorize A Third Party, Benchmarking Dashboard, Overview, Quick Services, Your Home, Your Business, Customer Support, Partners & Vendors, Outage Center, and Safety. The main content area is titled 'Customer Account Information' and includes a section for 'Property: XYZ Property'. Below this, it asks 'Do you already have an SCE Customer Account Number?'. The 'No, I don't have one' option is selected and highlighted with a red box labeled '8b'. Below this, there are input fields for 'Your Name', 'Phone Number', 'Mobile', and 'Tax ID', each with a green checkmark. At the bottom, there are 'Cancel', 'Previous', and 'Next' buttons. The 'Next' button is highlighted with a red box labeled '9b'.

The Data Sharing Key page displays. Note the “orange” message at the top of the page that indicates that Tenant Authorization is required.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 4: Building Tenant Set-up

10. Click **Authorization Form** to download the form.
11. Click the link **Instructions for Authorization Form** to download instructions for the completion of the form.

NOTE Give a copy of the form to each tenant to complete and sign

EDISON
Energy for What's Ahead

Profile | Data Sharing | Overview

Data Sharing Key

You have successfully mapped meters to your building.

TENANT AUTHORIZATION REQUIRED Data cannot be shared until all authorizations are received and approved.

For buildings with fewer than 3 accounts, written consent from each tenant is required before receiving their usage data. If you already have approved authorization on file or are the owner of the meter, this message will go away once you enter the Data sharing Key below into ENERGY STAR® Portfolio Manager®.

For buildings that are subject to Benchmarking and Disclosure requirements, AB802 also requires that tenants be informed that their energy use will be shared with the California Energy Commission and subject to public disclosure. Please send the following letter informing the tenant along with the authorization form listed below.

Tenant Data Disclosure Letter

| UNIT/TENANT | 6618 [REDACTED] |
|-------------|---|
| Unit | *****9260 |
| Meter | *****9260 |
| | Authorization Form > |
| | Instruction for Authorization Form > |

| UNIT/TENANT | 6618 [REDACTED] |
|-------------|---|
| Unit | *****9261 |
| Meter | *****9261 |
| | Authorization Form > |
| | Instruction for Authorization Form > |

Next Step

You can now enter the following Data Sharing Key for this building into your ENERGY STAR® Portfolio Manager®. You can find your Data Sharing Key at any time on your Benchmarking Dashboard.

9LF4TT76JH

[How to add your Data Sharing Key to Portfolio Manager >](#)

Property

| Property Name | XYZ Property |
|-----------------|--------------|
| Property ID | 3407 |
| Buildings Added | 2 |

Buildings

| Building Name | Building 1 |
|------------------------------|------------|
| SCE Building ID | 3856 |
| Public Disclosure Compliance | Yes |

[Return to Dashboard >](#)

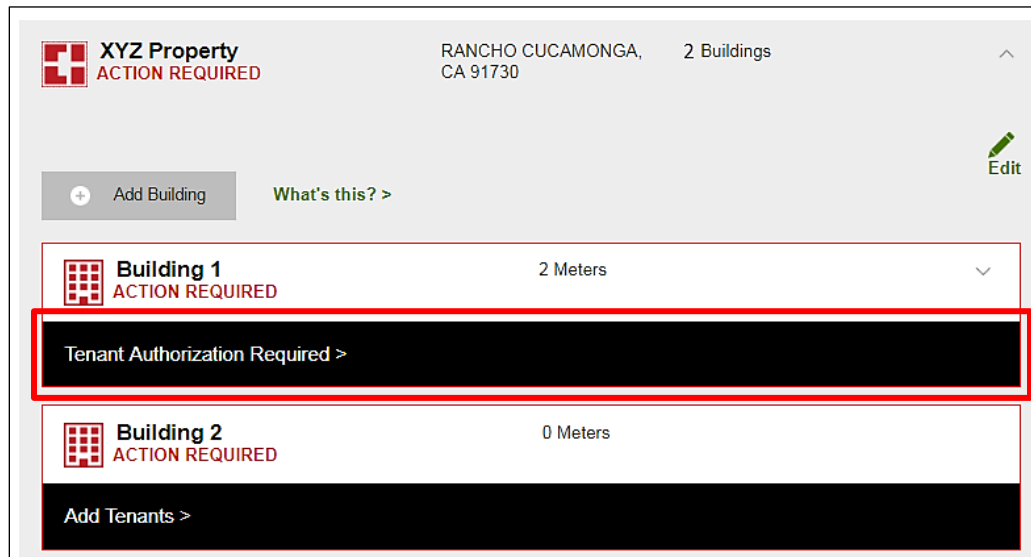
12. Click **Return to Dashboard** to view the results.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 4: Building Tenant Set-up

The Benchmarking Dashboard displays, showing that action is required.



Continue selecting the tenants for each additional building you added to the Property.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

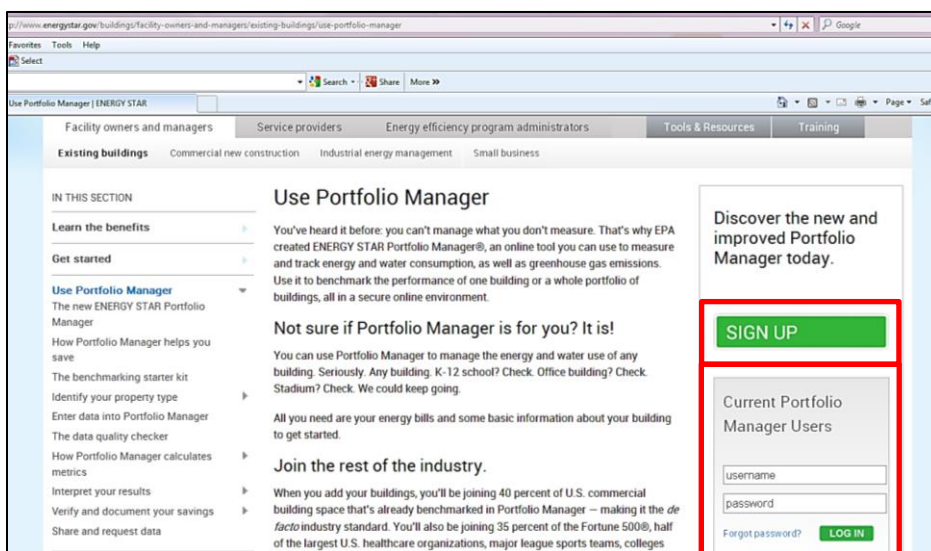


Create a Portfolio Manager Account

Create and Sign In to Your Portfolio Manager Account

1. Go to **Energy Star® Portfolio Manager** at www.energystar.gov/benchmark.
2. If you are new to Portfolio Manager, click **SIGN UP** to create an Account and proceed to 3 below.

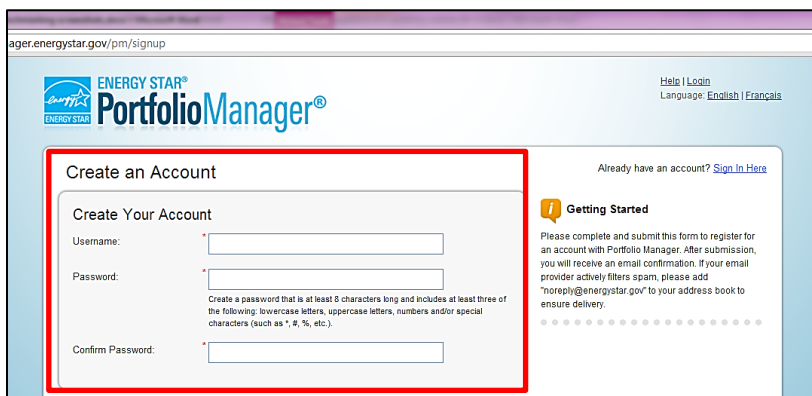
If you already have a Portfolio Manager account, enter your username and password, click **LOG IN**, and proceed to the next section beginning on page 38.



3. **Create Your Account** in Portfolio Manager by entering a username and password.



The username cannot be modified, but all other contact information can be updated at any time.



Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 5: Create a Portfolio Manager Account

- Below the Create an Account block, enter information **About Yourself**, including **First** and **Last Name**, **Job Title**, **Email** address, **Phone** Number, **Street Address**, **City**, **State** and **Postal Code**.

The fields with an asterisk (*) are required.

ager.energystar.gov/pm/signup

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

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

Phone: *

Country: *

Language:

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

Street Address: *

City/Municipality: *

State/Province: *

Postal Code: *

Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization 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

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 5: Create a Portfolio Manager Account

- Below the About Yourself block enter information **About Your Organization** including **Organization Name**, **Primary Business**, or **Service of your Organization**.

NOTE

The Organization Name must be at least 3 characters long in order to connect with SCE. There are also several optional characteristics of information you can enter, such as whether your organization is an ENERGY STAR® Partner or whether you would like people to be able to search for you in Portfolio Manager and send you a connection request in order to share building information.

The screenshot shows the Portfolio Manager sign-up page at manager.energystar.gov/pm/signup. The 'About Your Organization' section is highlighted with a red box. It includes fields for 'Organization Name', 'Primary Business or Service of Your Organization' (a dropdown menu), and two yes/no questions: 'Is your organization an ENERGY STAR Partner?' and 'Will you be using the web services API to develop software to exchange data with Portfolio Manager?'. To the right, there are informational sections for 'Primary Business or Service', 'Web Services', and 'Connecting with Others in Portfolio Manager'. The 'Searchability in Portfolio Manager' section is also highlighted with a red box, containing a yes/no question about allowing others to search for you and send connection requests.

- In the **Recovering Access to Your Account** block, select two security questions and provide your answers. In the event that you forget your username or password, Portfolio Manager will ask for answers to your security questions.
- Once you have entered all information on the page, click **Create My Account**.

The screenshot shows the 'Recovering Access to Your Account' section highlighted with a red box. It includes two security questions, each with a dropdown menu to 'Select a Question' and a text field for 'Your Answer:'. A red box with the number '6' points to the security question dropdowns. Another red box with the number '7' points to the 'Create My Account' button at the bottom of the form. The footer includes social media links and a list of links: 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 5: Create a Portfolio Manager Account

You will be directed to the Welcome Page of Portfolio Manager.

8. Enter Your **Username** and **Password**, and click **Sign In**.

nager.energystar.gov/pm/login.html

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](#)

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

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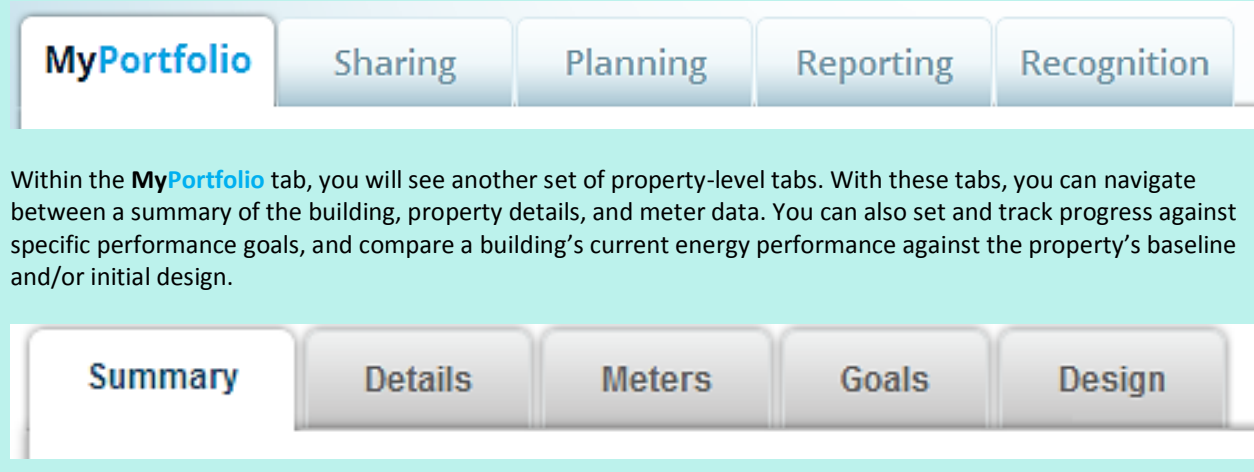
Understanding Your Building's Energy Performance

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Set Up a Property in Portfolio Manager

Tip: Navigating within Portfolio Manager is simple using the five tabs (**MyPortfolio**, **Sharing**, **Planning**, **Reporting**, and **Recognition**) to guide you. For example, there are multiple ways to get to the same place. The **MyPortfolio** page automatically loads with a list of properties you set up, two charts that you can customize on the left hand side, and a list of your account's Notifications. These can be requests to share data, updates on ENERGY STAR certification applications, and/or others.



Unlike the registration process on SCE.com, a **Property in Portfolio Manager is a building** with all of its associated characteristics (e.g., gross area square footage, hours of operation, number of employees working the main shift, etc.). If you have multiple buildings to benchmark, you will need to set up a Property for each one in Portfolio Manager. This will enable you to see usage data unique to each one of your buildings.

NOTE

When identifying building characteristics, you are prompted to enter additional information based on the details you specify for your building (e.g., parking available, data center, hours of operation each week, etc.).

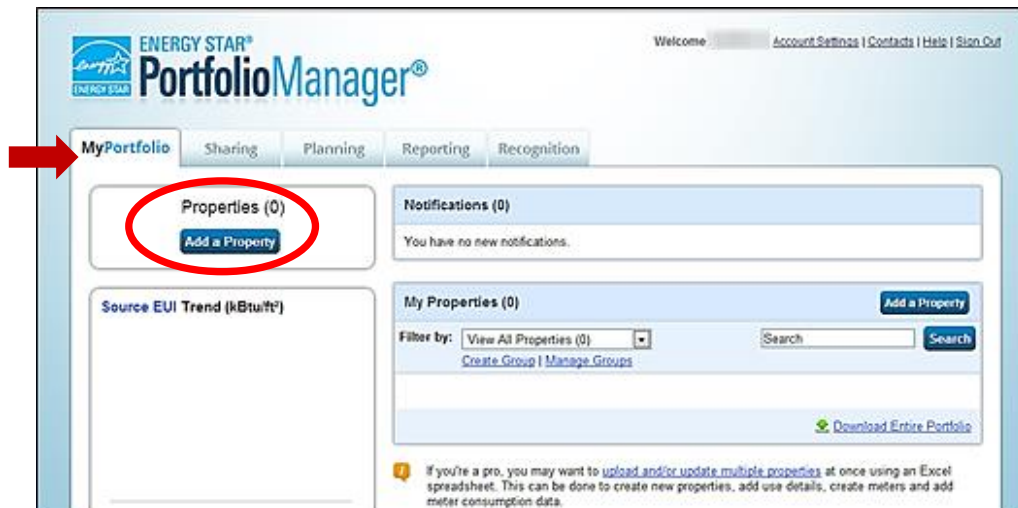
Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 6: Set Up a Property in Portfolio Manager

Set Up a Building

1. In the top left-hand corner of the **MyPortfolio** tab, select **Add a Property**.



The **Set up a Property: Let's Get Started!** page displays. On this page, you will designate **Your Property's Primary Function**, **Your Property's Buildings**, and **Your Property's Construction Status**.

The screenshot shows the 'Set up a Property: Let's Get Started!' page. It includes a welcome message and instructions. The main form has three sections: 'Your Property's Primary Function' with a dropdown menu, 'Your Property's Buildings' with radio buttons and a text input, and 'Your Property's Construction Status' with radio buttons. There are also 'Get Started!' and 'Cancel' buttons at the bottom. Two 'Tip' boxes provide additional guidance on setting up the property.

2. In the **Your Property's Primary Function** section, click the drop-down menu.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 6: Set Up a Property in Portfolio Manager

You can choose from more than 85 types, which will allow you to better define your property and improve the analysis when comparing your property to similar properties. Scroll down to see additional choices.

Select a primary function

Select a primary function

Banking/Financial Services

- Bank Branch
- Financial Office

Education

- Adult Education
- College/University
- K-12 School
- Other
- Pre-school/Daycare
- Vocational School

Entertainment/Public Assembly

- Convention Center
- Movie Theater
- Museum
- Other
- Performing Arts
- Recreation
- Social/Meeting Hall
- Stadium

NOTE

Some properties include multiple use types, such as restaurants in hotels, salons in senior care communities, and cafeterias in hospitals. As a general rule, if a certain use commonly occurs in the type of property being benchmarked, simply include it in the square footage of the building's primary use. You do not need to add another type of use.

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?

Medical Office

[Learn more about Property Types.](#)



Tip

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

3. Designate the number of physical buildings located on your property. This is important if you plan benchmarking a campus property. Select either
 - **None** (your property is part of a building)
 - **One** (my property is a single building – this is typically the choice you will make for each building on your property)

Understanding Your Building's Energy Performance


A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 6: Set Up a Property in Portfolio Manager

- **More than One** (My property includes multiple buildings) and enter the total number of buildings. **A property with multiple buildings is considered a campus.** You will start by defining the campus as the main property. From there, you can:
 - Add individual buildings.
 - Track performance by updating information at the property and building levels.
 - Meter buildings separately and/or roll meters up to the property level.

NOTE

For properties with multiple buildings, only hotel, hospital, K-12 school, multifamily housing or senior care communities are eligible to receive a 1-100 ENERGY STAR score at the campus level.



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?


**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.

4. Select the **Your Property's Construction Status:**

- **Existing**
- **Design Project**
- **Test Property**

Most properties will be **Existing**, but Portfolio Manager enables users to enter in projects that are still in the Design stage in order to assess the anticipated, as-designed energy use. Once your project is built, you can use Portfolio Manager to compare designed energy use against actual, in-operation energy use.




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.

**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](#).

[Cancel](#)

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 6: Set Up a Property in Portfolio Manager

5. Click **Get Started!**

ENERGY STAR® PortfolioManager®

Welcome [User Name]: [Account Settings](#) | [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!

1 **ACME BANK**

Your Property Type

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

2 Medical Office

[Learn more about Property Types.](#)

Your Property's Buildings

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

3

☐ 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.

4

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

Tip

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

Tip

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

Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a property, either to familiarize yourself with features or maybe to train other people. By telling us this is 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](#).

The **Set Up a Property Basic Information** page displays.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 6: Set Up a Property in Portfolio Manager

6. In the **About Your Property** block, enter basic property information including **Street Address**, **Year Built**, **Gross Floor Area** and **Occupancy** percentage.
7. In the **Do Any of These Apply?** block, check the boxes next to the statements that apply to your property, such as whether your property's energy consumption includes parking. You will be prompted to provide further information about your building(s) use, based on typical functions found at the primary property type you selected. This allows the tool to determine the additional information that may be needed.
8. Click **Continue**.

Set Up a Property: Basic Property Information

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

About Your Property

Name:

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

Year Built:

Gross Floor Area: ☐ Temporary Value

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

Irrigated Area: %

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

[Back](#) [Continue](#) [Cancel](#)

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

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

The **Set up a Property: How it is Used** page displays. The **Basic Information** block displays building details entered thus far.

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 6: Set Up a Property in Portfolio Manager

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: | XYZ Bldg R | Country: | US |
| Property Type: | Medical Office | Address: | 123 Any Street Ventura, CA 93004 |
| Year Built: | 1980 | | |
| Property consists of: | 1 building with parking | | |

Edit

Add Another Type of Use

Add

9. In the **Building Use** block, enter building information in the fields provided under **Property Use Detail**.

Building Use

Edit Name

Medical Office refers to buildings used to provide diagnosis and treatment for medical, dental, or psychiatric outpatient care.

Gross Floor Area should include all space within the building(s) including offices, exam rooms, laboratories, lobbies, atriums, conference rooms and auditoriums, employee break rooms and kitchens, rest rooms, elevator shafts, stairways, mechanical rooms, and storage areas. If you have restaurants, retail (pharmacy), or services (dry cleaners) within the Medical Office, you should most likely include this square footage and energy in the Medical Office Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

- If it is a [Property Use Type that can get an ENERGY STAR Score](#) (note: Retail can only get a score if it is greater than 5,000 square feet)
- If it accounts for more than 25% of the property's GFA
- If it is a vacant/unoccupied Office
- If the Hours of Operation differ by more than 10 hours from the main Property Use

[More on this rule.](#)

| Property Use Detail | Value | Current As Of | Temporary Value |
|-----------------------------------|---|---------------|--------------------------|
| ★ Gross Floor Area | 25,000 Sq. Ft. | 1/1/2017 | <input type="checkbox"/> |
| Surgery Center Floor Area | Sq. Ft. | 1/1/2017 | <input type="checkbox"/> |
| ★ Weekly Operating Hours | 40 <input type="checkbox"/> Use a default | 1/1/2017 | <input type="checkbox"/> |
| ★ Number of Workers on Main Shift | 10 <input type="checkbox"/> Use a default | 1/1/2017 | <input type="checkbox"/> |
| Number of Surgical Operating Beds | | 1/1/2017 | <input type="checkbox"/> |
| Number of MRI Machines | | 1/1/2017 | <input type="checkbox"/> |
| ★ Percent That Can Be Heated | All of it - 100% <input type="checkbox"/> Use a default | 1/1/2017 | <input type="checkbox"/> |
| ★ Percent That Can Be Cooled | All of it - 100% <input type="checkbox"/> Use a default | 1/1/2017 x | <input type="checkbox"/> |

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

Provide details on your primary building use, as well as details on additional property uses. You can use default or a **Temporary Value** if you don't have all the information needed. Just remember to update this with actual information once you have it.

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Step 6: Set Up a Property in Portfolio Manager

10. Complete each additional block on the page.

Depending on the boxes selected describing how the building is used on the previous property set up page, additional blocks display that need to be completed (e.g., Vacant Space, Overtime Tenant, etc.). Scroll down the page to see all blocks that need to be completed.

11. When you have entered all of the property information, click **Add Property**.

| Property Use Detail | Value | Current As Of | Temporary Value |
|---|--|---------------|--------------------------|
| Open Parking Lot Size | 5000 x Sq. Ft. | 1/1/1980 | <input type="checkbox"/> |
| Partially Enclosed Parking Garage Size | Sq. Ft. | 1/1/1980 | <input type="checkbox"/> |
| Completely Enclosed Parking Garage Size | Sq. Ft. | 1/1/1980 | <input type="checkbox"/> |
| Supplemental Heating | <input type="checkbox"/> Use a default | 1/1/1980 | <input type="checkbox"/> |

A dialog box displays that warns you to enter all property details, unless you want Portfolio Manager to calculate default values on your behalf, based on gross floor area.

12. Click **Continue** to have Portfolio Manager calculate usage based on default values or **Cancel** to provide your own values to required fields.

If you do not enter values for all of your property's use details then Portfolio Manager will calculate default values on your behalf (based on your gross floor area). Default values cannot be used to apply for ENERGY STAR certification. You may click "Continue" to use default values for any empty values or click "Cancel" to provide your own values.

If you click **Continue**, you are returned to the **MyPortfolio** tab. If you click **Cancel**, you are returned to the **Set up a Property: How it is Used** window so that you can continue to enter required values.

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Step 6: Set Up a Property in Portfolio Manager

13. Click the **Details** tab to see a summary of the property information.

The screenshot shows the 'Details' tab in the ENERGY STAR Portfolio Manager interface. The top navigation bar includes 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. A green banner at the top of the main content area says 'Congratulations! You have successfully created your property. Next, you can: Add energy use information, so that you can see your energy performance metrics.'

Property information for 'XYZ Bldg R' is displayed, including the address '123 Any Street, Ventura, CA 93004', 'Portfolio Manager Property ID: 5821439', and 'Year Built: 1980'. A button labeled 'Map It' is next to the address. A blue box indicates 'Not eligible to apply for ENERGY STAR Certification'. A 'Weather-Normalized Source EUI (kBtu/ft²)' box shows 'Current EUI: N/A' and 'Baseline EUI: N/A'.

The 'Details' tab is highlighted in the navigation bar. The main content area is divided into several sections:

- Basic Information:** Construction Status: Existing property that is one single building. Property GFA - Self-Reported: 25,000 Sq. Ft. Occupancy: 80%. An 'Edit' button is present.
- Unique Identifiers (IDs):** Portfolio Manager ID: 5821439. Custom IDs: None. Standard IDs: None. A note explains that users can select from Portfolio Manager's Standard IDs or create up to three Custom IDs. An 'Edit' button is present.
- Additional Information:** Federal Property: Not Set. Service & Product Provider: None (Find a SPP). An 'Edit' button is present.
- Property Uses and Use Details:** A table lists property uses. The 'Details' tab is highlighted in the navigation bar.
- Property Type:** A message states: 'A property type cannot be calculated by EPA because you do not have 12 months of data for your Gross Floor Area for the following uses: Parking Use - 0 ft² (doesn't begin until 01/01/1980), Building Use - 25,000 ft² (doesn't begin until 01/01/2017). If you have a new property use (e.g. a new retail store), see this FAQ for assistance in entering.'
- Property Notes:** A text area for notes with a 'Save Notes' button. A warning icon and text state: 'Caution! Deleting your property is permanent.'

| Name | Property Use Type | Gross Floor Area | Action |
|--------------|-------------------|------------------|--------------|
| Parking Use | Parking | 5,000 ft² | I want to... |
| Building Use | Medical Office | N/A ft² | I want to... |

Property GFA (Buildings): N/A (used to calculate EUI)
Property GFA (Parking): 5,000

To add multiple uses and buildings to this property, you can use this spreadsheet template to upload your information.

You have 1000 characters remaining for your notes.

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Step 6: Set Up a Property in Portfolio Manager

NOTE

Portfolio Manager is able to provide significant guidance as you work through setting up a property using prompts and alerts. As you pass your mouse over each property use characteristic, the precise definition for that characteristic displays to ensure that you are entering the most accurate information. There are hundreds of tips, definitions, and mouse-overs that can be found throughout the tool. Each is there to assist you to accurately benchmark any type of property.

As needed, you can change the Name of Building and Property Use by clicking **Edit Name**.

If you have additional spaces or property types, you can go to the drop down menu under **Add Additional Type of Use** and designate another space or property type. Note, if you add additional property types or spaces, ensure that the square footage of your building is correct; Portfolio Manager initially auto-fills the square footage of your entire building under the primary designation.

Tip: Designate separate spaces within the property if the operating hours are significantly different. For example:

- *Overtime office (or some other name, as appropriate):* This is where you would break out any office space that has significantly different (>10%) weekly operating hours from the general office space. If you have two or more tenants, each of which have significantly different run times from each other and from the rest of the building, you could enter more than one entry for this category.
- *Vacant space:* Even if there is no vacant space at present, if it is a multi-tenant building and vacancies are a possibility, it is recommended to designate vacant space, even if it is currently set at 0 square feet. The number of people, computers, and operating hours should all be set at 0 for vacant space, although usually the space is heated and cooled in a manner consistent with the rest of the building.

The screenshot shows the 'Building Use' section of the Portfolio Manager interface. At the top right, there is a button labeled 'Add Another Type of Use' with a dropdown arrow, which is highlighted with a red box. Below this, the 'Building Use' section is expanded, showing a description of 'Financial Office' and a table with columns for 'Property Use Detail', 'Value', 'Current As Of', and 'Temporary Value'. The 'Edit Name' link is also highlighted with a red box.

| Property Use Detail | Value | Current As Of | Temporary Value |
|---|-------|---------------|-----------------|
| 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. | | | |

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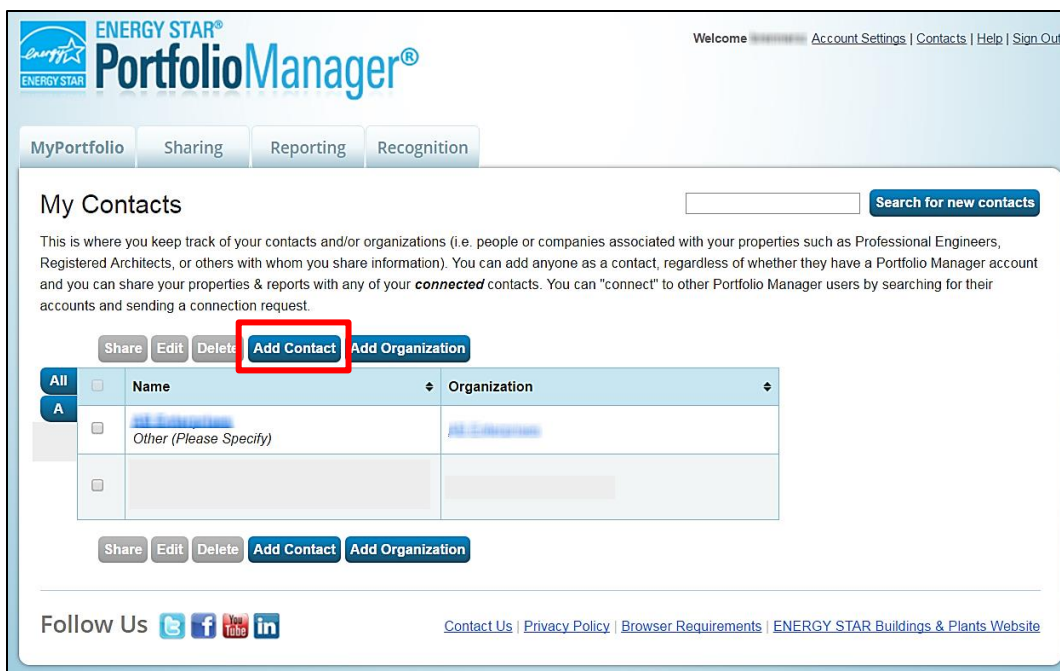
Share Data

The steps below enable energy usage data to flow from SCE to Portfolio Manager.

1. On the **MyPortfolio** tab, click the **Contacts** link in the top right corner of the page.



2. In the next window click **Add Contact**.



The **Add Contact** window displays.

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Step 7: Share Data

3. Enter **Southern California Edison** in the **Name** field.
4. Click **Search**.

The screenshot shows the 'Add Contact' interface with tabs for MyPortfolio, Sharing, Reporting, and Recognition. Below the tabs is a heading 'Add Contact' and a paragraph explaining two ways to add a contact. A search form titled 'Find Contact in Portfolio Manager' is shown with fields for Name, Organization, Username, and Email. The 'Name' field is populated with 'Southern California Edison'. A red box highlights the 'Search' button, and another red box highlights the 'Name' field. Red numbers 3 and 4 are placed next to the 'Name' field and the 'Search' button respectively.

The **Southern California Edison's Automated Data Exchange Service** displays.

5. Click **Connect**.

The screenshot shows the 'Search Results' interface. On the left, there is a 'Your Search Criteria' section with fields for Name, Organization, Username, and Email Address. The 'Name' field is populated with 'Southern California Edison'. On the right, there is a search results table. The first row shows a contact named 'Southern California Edison' with a description 'SCE's Automated Data Exchange Web Services with Southern California Edison'. A red box highlights the 'Connect' button next to this result. Below the table, there is a pagination bar showing 'Page 1 of 1' and a dropdown menu for '50' results per page.

The **Send a Connection Request to Southern California Edison** page displays.

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Step 7: Share Data

6. Read SCE's **Terms of Use**.
7. Check the box at the bottom of the window to indicate that you have read and agree to SCE's **Terms of Use**.
8. Click **Send Connection Request**.

Send a Connection Request to Southern California Edison to Begin Exchanging Data

SCE's online Automated Benchmarking Service requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [SCE's Automated Benchmarking Service](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use:

1. General & Eligibility.

- SCE's online Automated Benchmarking Service allows SCE to electronically upload your buildings' aggregated energy usage, as well as to view, create, access and modify such data in the Environmental Protection Agency (EPA) Portfolio Manager database.
- To use this service, you understand that you must be the building owner or the authorized representative of the building owner of the buildings designated ("Buildings"), and you must provide proof of Building ownership prior to accessing data. You represent that you are the owner, or authorized representative of the owner, of these Buildings.
- As part of your use of the Automated Benchmarking Service, you will be asked to provide certain information to SCE. You agree to provide accurate and complete information.
- By accepting these Terms and Conditions or otherwise using

Agreement: ☒ I agree to my provider's [Terms of Use](#).

Send Connection Request [Cancel](#)

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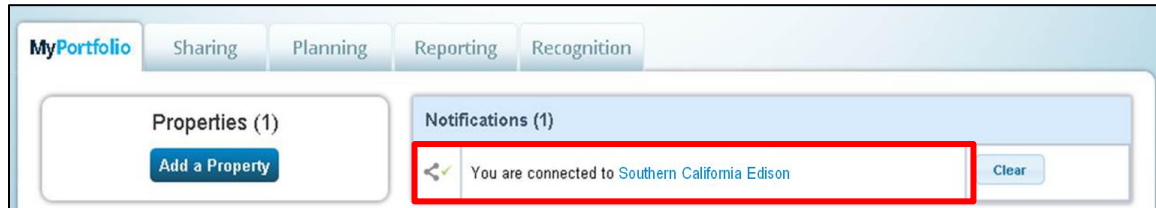
Southern California Edison processes connection requests every two hours. As soon as you submit your request, you will see a notification that it has been submitted on the **MyPortfolio** tab.

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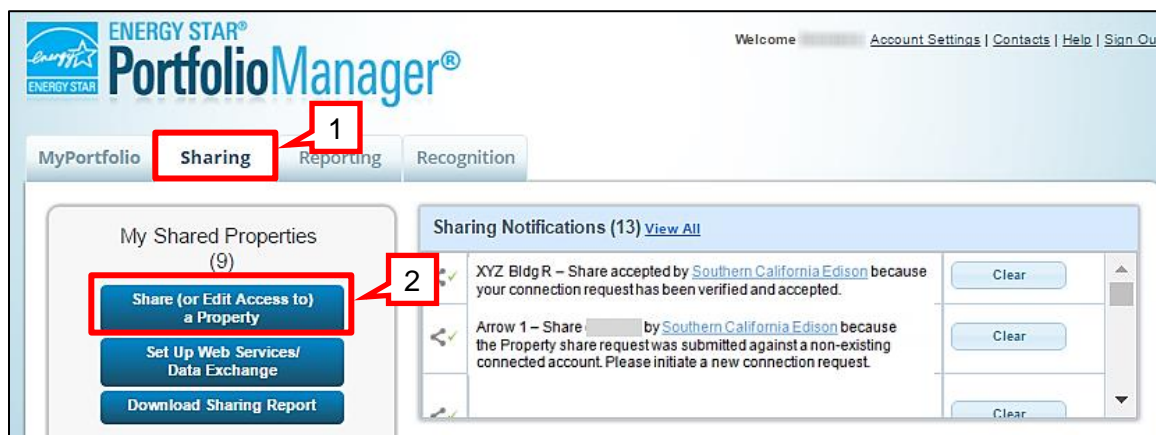
Step 7: Share Data

Once your request is approved, you will see a notification on the **MyPortfolio** tab that you are connected to Southern California Edison.



Share Your Building

1. Click on the **Sharing** tab.
*The **Sharing** page displays.*
2. Click **Share (or Edit Access to)** a Property.



*The **Share or Edit Access** page displays.*

Understanding Your Building's Energy Performance

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Step 7: Share Data

3. Select the number of properties.
4. Select the **Property Name**.
5. Select the **Account** to share with.
6. For **Choose Permissions**, click the radio button next to **Personalized Sharing & Exchange Data ("Custom Orders")**.
7. Click **Continue**.

MyPortfolio | **Sharing** | Reporting | Recognition

Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.

1 **2** **3** **4** **5** **6** **7**

Select Properties

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

One Property | XYZ Bldg R

Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? 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:

Southern California Edison

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

Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions or share with Data Exchange providers, select the 2nd option.

☐ Bulk Sharing ("One-Size-Fits-All") - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).

☒ Personalized Sharing & Exchange Data ("Custom Orders") - I need to give different permissions for different share requests, and/or I need to give Exchange Data permission.

Continue [Cancel](#)

Sharing with Accounts

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

Exchanging Data

To get started, first [connect with an organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left. Note: you can now share in bulk for [exchanging data](#).

Who gets to Share Forward?

Full Access - Automatically includes "Share Forward" rights

Read Only - Automatically does NOT include "Share Forward" rights

Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Exchange Data - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

The Share Your Properties page displays.

8. In the table row that identifies **Southern California Edison**, click the radio button in the **Exchange Data** column.
9. Click **Share Property(ies)**.

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Step 7: Share Data

ENERGY STAR® PortfolioManager®

Welcome [User] | Account Settings | Contacts | Help | Sign Out

MyPortfolio | **Sharing** | Reporting | Recognition

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.

4 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: Property Name ▼

| Name (ID) | No Access | Read Only Access | Full Access | Custom Access | Exchange Data |
|-----------------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| ▼ [Property Name] (5813158) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Southern California Edison | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

8

9 **Share Property(ies)** Cancel

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A dialog box displays where you can enter your **Data Sharing Key** obtained when you registered your building with SCE and designate the level of access to give.

10. Enter the **Data Sharing Key**.
11. Click the **Full Access** radio button.
12. Click the level of access to give SCE for **Goals, Improvements, & Checklists** and **Recognition**.
13. Scroll down.

Select Access Permissions to XYZ Bldg R for Southern California Edison

The following information is required by [Utility] in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Data Sharing Key: Example: ABC1234567

Select the permission level below that you would like to grant Southern California Edison for each category.

| Item | None | Read Only Access | Full Access |
|-----------------------------------|----------------------------------|-----------------------|----------------------------------|
| Property Information | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| ▼ All Meter Information | | | |
| Goals, Improvements, & Checklists | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Recognition | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Additional Options:

10

11

12

13

Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Step 7: Share Data

14. Under **Additional Options – Share Forward**, click the **No** radio button.
15. Click **Apply Selections & Authorize Exchange**.

Select Access Permissions to [XYZ Bldg R](#) for [Southern California Edison](#)

| Item | None | Read Only Access | Full Access |
|-----------------------------------|----------------------------------|-----------------------|----------------------------------|
| Property Information | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> |
| ▼ All Meter Information | | | |
| Goals, Improvements, & Checklists | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Recognition | <input checked="" type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Additional Options:

| Item | Yes | No |
|-----------------|-----------------------|----------------------------------|
| * Share Forward | <input type="radio"/> | <input checked="" type="radio"/> |

[Apply Selections & Authorize Exchange](#)

You are returned to the **Share Your Property(ies)** page.

16. Click **Share Property(ies)**.

ENERGY STAR® PortfolioManager®

Welcome [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

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

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.

4 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: [Property Name](#)

| Name (ID) | No Access | Read Only Access | Full Access | Custom Access | Exchange Data |
|--|-----------------------|-----------------------|-----------------------|-----------------------|---|
| ▼ Southern California Edison (5813158) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input checked="" type="radio"/> Edit |

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

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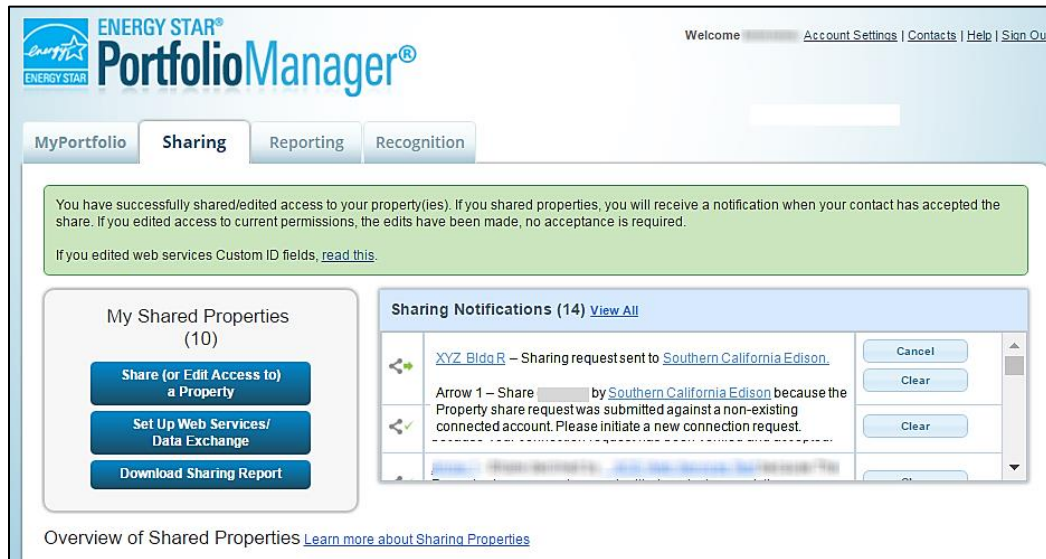
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Step 7: Share Data

You are returned to the main page on the Sharing tab.



Once data sharing has been successfully established with SCE, you will be able to access benchmarking data for your property on Portfolio Manager within one to five business days.

NOTE

If tenant consent(s) is required, it may delay when shared data is available for viewing in Portfolio Manager.

It is easy for you to see trends and to track improvement for a property or your entire portfolio of buildings with a variety of standard graphs and reports in Portfolio Manager.

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View Results and Track Progress

Once sharing of energy usage data is established with SCE and your Portfolio Manager account, you can access benchmarking results for your property.

Portfolio Manager makes it easy for you to see trends and to track improvement for a property or an entire portfolio of buildings with a variety of standard graphs and reports. The website provides links to additional training information, including monthly classes at: <https://www.energystar.gov/buildings/training/training>.

The screenshot displays the ENERGY STAR Portfolio Manager website. The top navigation bar includes links for 'ABOUT ENERGY STAR' and 'PARTNER RESOURCES'. The main header features the ENERGY STAR logo and the tagline 'The simple choice for energy efficiency.' Below this, there are four categories: 'ENERGY EFFICIENT products', 'ENERGY SAVINGS at home', 'ENERGY EFFICIENT new homes', and 'ENERGY STRATEGIES FOR buildings & plants'. The breadcrumb trail shows 'Home » Buildings & Plants » Training » Slide Library'. The 'Buildings & Plants' section has a sub-navigation bar with tabs for 'Owners and managers', 'Service providers', 'Program administrators', 'Tenants', 'Tools and Resources', and 'Training'. The 'Slide Library' page is active, showing a list of annotated ENERGY STAR slides. On the right side, there is a sidebar with a 'Portfolio Manager' logo and a 'LIVE AND RECORDED TRAINING SESSIONS' section. This section includes a link to view and register for live or recorded ENERGY STAR training. Below this, there is an 'ASK A QUESTION' section with a link to the help page. At the bottom, there is a 'GET MORE OUT OF ENERGY STAR TRAINING' section with a link to monthly emails.

Home » Buildings & Plants » Training » Slide Library

Buildings & Plants

about us | press room | help desk | [portfolio manager login](#)

Owners and managers | Service providers | Program administrators | Tenants | **Tools and Resources** | Training

Training | **Slide Library** | Knowledgebase

Slide Library

Find annotated ENERGY STAR slides to learn more about ENERGY STAR and Portfolio Manager, or teach others about the program.

General information

- What is ENERGY STAR for buildings?
- How to engage with the ENERGY STAR program

Portfolio Manager

- Overview of Portfolio Manager
- Portfolio Manager 101: Set up properties and meters, generate reports
- Portfolio Manager 201: Edit and correct property data, use data quality checker, share properties
- Portfolio Manager 301: Update data, set baselines, goals, and targets, create custom reports, use the Sustainable Buildings Checklist
- The Federal Guiding Principles Checklist in ENERGY STAR Portfolio Manager (PPT, 10 KB)
- Introducing Waste & Materials Management in Portfolio Manager (PPT, 8.3 MB)

Energy Efficiency and ENERGY STAR

- What you should know about financing energy efficiency upgrades (PDF, 3.55 MB)
- ENERGY STAR and green building rating systems (PPT, 6 KB)

Applying for recognition

- How to Apply for the ENERGY STAR
- How to Apply for Designed to Earn the ENERGY STAR

College course

- ENERGY STAR Commercial Buildings College Course

ENERGY STAR® Portfolio Manager®

"Ask The Expert" webinar

Every Wednesday at 12pm noon ET

LIVE AND RECORDED TRAINING SESSIONS

Click here to view and register for live or recorded ENERGY STAR training.

ASK A QUESTION

Have a specific Portfolio Manager question? Check out www.energystar.gov/buildingshelp.

GET MORE OUT OF ENERGY STAR TRAINING

Get monthly emails listing upcoming training sessions.