

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.

Links and Resources

- SCE's Benchmarking Website: www.sce.com/benchmarking
- 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. **IMPORTANT: 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 the User ID or password is lost, SCE cannot retrieve it.**

If you have any questions, 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. Navigate to the right to **For Business**.



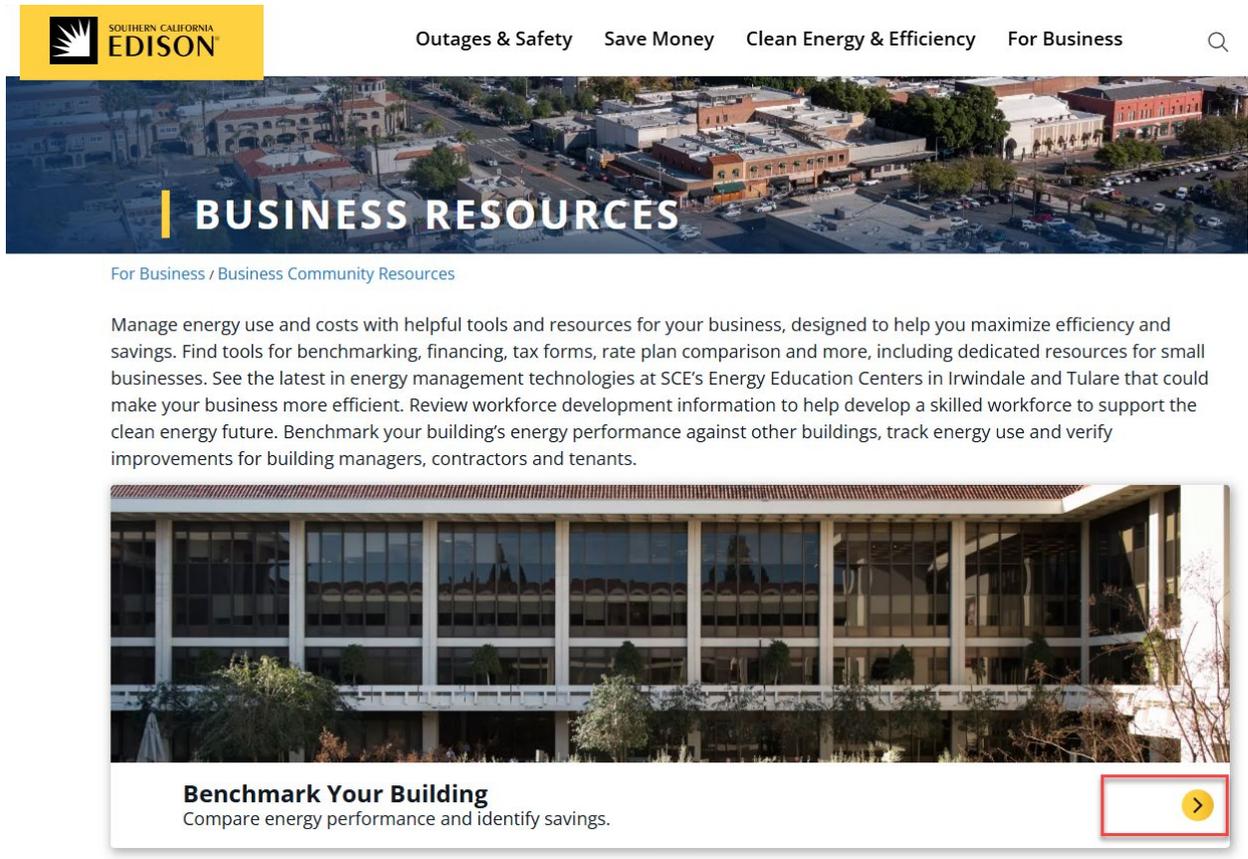
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3. Scroll down and select **Business Resources**.



4. From Business Resources, select **Benchmark Your Building**.



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

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NOTE

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.

BENCHMARK YOUR BUILDING

[For Business](#) / [Business Community Resources](#) / [Business Resources](#)

What Is BenchMarking?

Benchmarking is a way to measure your building's energy performance and compare it to other buildings using [ENERGY STAR® Portfolio Manager®](#).



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.

Ready to get started?

Begin by logging in with your SCE.com User ID - or register if you don't have one - to access your Benchmarking Dashboard. You can then create profiles for your properties and buildings.

5. Sign into your SCE.com account or register for one if you do not have one.

Begin by logging in with your SCE.com User ID - or register if you don't have one - to access your Benchmarking Dashboard. You can then create profiles for your properties and buildings.

Log Into SCE.com

Email *

❗ This field cannot be left blank

Password *

❗ This field cannot be left blank

Remember me

[Forgot Password?](#)

LOG IN

Create New Account

OR

[Register Now >](#)

Feedback

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- 5a. If you have an SCE.com account, **Log In** and proceed to the next section, **Step 3: Enter Property/Building Information**.
- 5b. If you do not have an SCE.com account, click **Register Now** and complete the registration process after reading the Tip below.

Begin by logging in with your SCE.com User ID - or register if you don't have one - to access your Benchmarking Dashboard. You can then create profiles for your properties and buildings.

Log Into SCE.com

Email *

! This field cannot be left blank

Password *

! This field cannot be left blank

Remember me

[Forgot Password?](#)

LOG IN

Create New Account

OR

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.

To Register for a New SCE.com User ID for Benchmarking

6. 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. If the User ID or password is lost, SCE cannot retrieve it. Also, ensure that the email address you plan to use has not been previously registered as a SCE.com user ID.
7. Enter an **Email Address**.
8. Enter a **Password**.
9. Confirm your new **Password**.
10. Click **Next**.

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Provide Info Verify Email

Register a New SCE.com User ID for Benchmarking

Required Field(s): First Name, Last Name, Email Address and Password.

Enter Your Name

Create a User ID

 Show Show

Cancel ✕

Next >

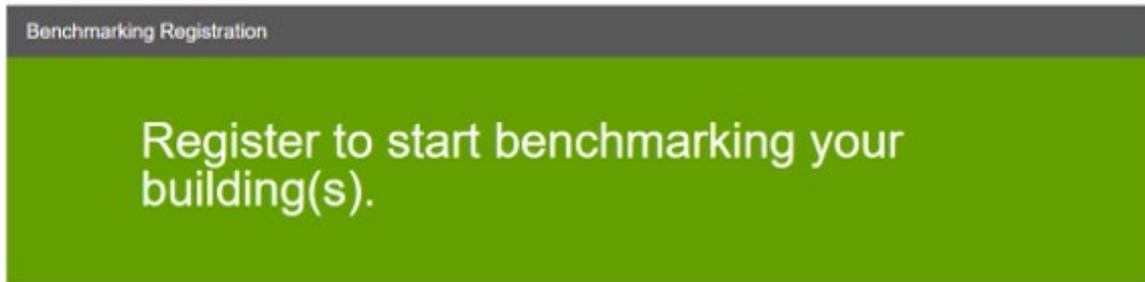
Feedback

The Terms and Conditions window displays.

11. Read the **Terms and Conditions**, and then click **I have read and agree** button.

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

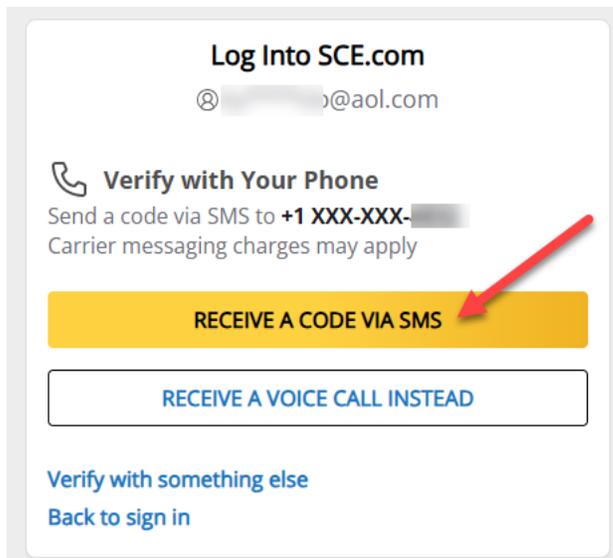
Please review and agree to the SCE Terms & Conditions for benchmarking.

[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.

12. You will be asked to verify your new account set up. **Request a code by text or phone call.**



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13. Enter the code and click VERIFY.

Log Into SCE.com
@aol.com

Verify with Your Phone
A code was sent to +1 XXX-XXX-
Carrier messaging charges may apply

Enter Code *

VERIFY

[Verify with something else](#)
[Back to sign in](#)

Log Into SCE.com
@aol.com

Verify with Your Phone
Haven't received an SMS? [Send again](#)

A code was sent to +1 XXX-XXX-
Carrier messaging charges may apply

Enter Code *

VERIFY

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14. After you verify your account, you are directed to the Benchmarking login page.

Begin by logging in with your SCE.com User ID - or register if you don't have one - to access your Benchmarking Dashboard. You can then create profiles for your properties and buildings.

Log Into SCE.com

Email *

! This field cannot be left blank

Password *

! This field cannot be left blank

Remember me

[Forgot Password?](#)

LOG IN

OR

Create New Account

Register Now >

15a. If you have an SCE.com account, **Log In** and proceed to the next section, **Step 3: Enter Property/Building Information**.

15b. If you do not have an SCE.com account, click **Register Now** and complete the registration process.

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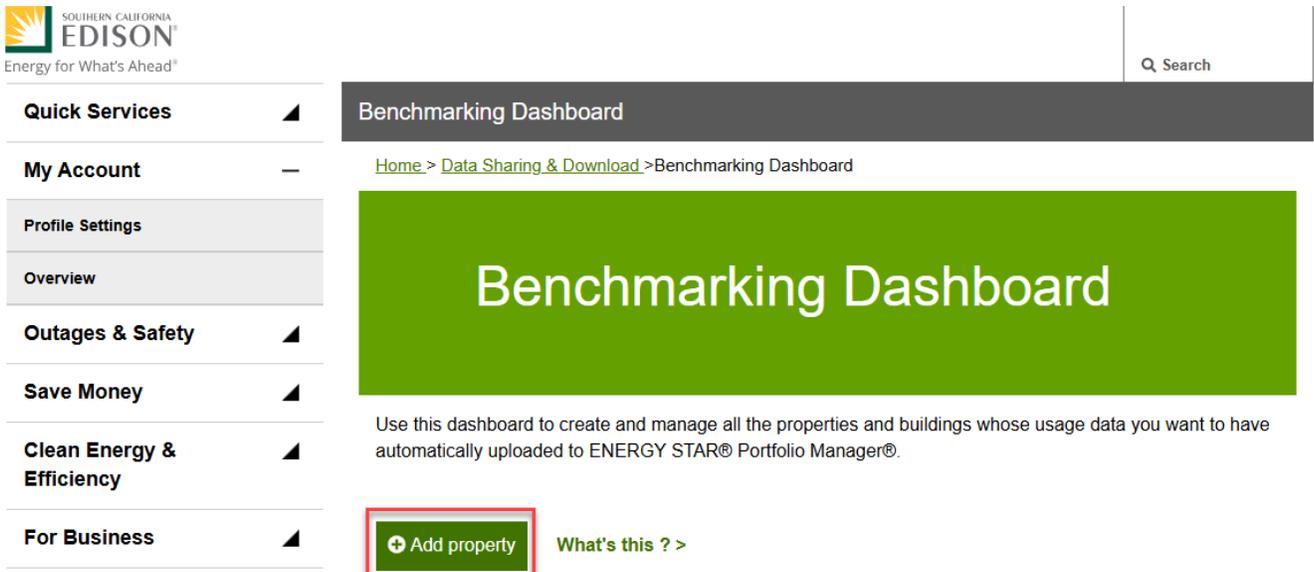
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Enter Property/Building Information

1. If not logged into SCE.com go to **For Business > Business 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.



The screenshot shows the SCE.com Benchmarking Dashboard. On the left is a navigation menu with the following items: Quick Services, My Account, Profile Settings, Overview, Outages & Safety, Save Money, Clean Energy & Efficiency, and For Business. The main content area has a dark header with 'Benchmarking Dashboard' and a search bar. Below the header is a breadcrumb trail: Home > Data Sharing & Download > Benchmarking Dashboard. A large green banner contains the text 'Benchmarking Dashboard'. Below the banner is a paragraph: '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®.' At the bottom, there is a red-bordered button labeled '+ Add property' and a link 'What's this ? >'.

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

4. Enter the **Property Name**.
5. Select "Combine Data from All Units". Click **Next**.

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Energy for What's Ahead[®]

Search

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 ? >](#)

Enter Property Name

Data Aggregation Preference [What is this ? >](#)

Combine Data From All Units

Separate Owner Data from Aggregated Tenant Data

Cancel ✕ < 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**.

Add Properties & Buildings

✓ 2 3

Add Buildings

Property : Test Guide

No buildings added yet.

+ Add A Building >

Cancel ✕ < Previous Next

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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**.

Add Properties & Buildings

✓ — 2 — 3

 Add Buildings

Property : Test Guide

No buildings added yet.

Building Name What is this ? >

Test Guide ✓

Are you adding this building to comply with the Building Energy Use Benchmarking and Public Disclosure Program?

Yes ✓

No

Cancel ✕ + Add This Building

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The next window displays the added building to the property.

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

SOUTHERN CALIFORNIA
EDISON
Energy for What's Ahead®

Q Search

Add Properties & Buildings

✓ — 2 — 3

Add Buildings

Property : Test Guide

Building(s) added to this property :

Test Guide x

Cancel x

+ Add Another Building

< Previous Next >

After clicking Next, the Enter Addresses window displays.

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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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- ◆ 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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11. Click **Add An Address**.

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: Test Guide

Add all addresses associated with your property

Cancel ✕ ➕ Add An Address < Previous Submit

The Enter Addresses window displays.

12. Enter the Service Address for the property.

📍 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: Test Guide

Add all addresses associated with your property

Service Address

Enter your Zip Code

Zip Code

Cancel ✕ Next >

The Dashboard will guide you as you enter each part of the address (Zip Code, City, Street Number and Street Name).

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13. Click **Next**.

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

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

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

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: Test Guide

Add all addresses associated with your property

Service Address

If this is the correct address, select "Next" to continue.

1515 [REDACTED] AVE

[REDACTED] CA 91770

Incorrect Address?

Cancel ✕

< Previous

Next >

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

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: Test Guide

Addresses added to this property:

1515 [REDACTED] AVE ✕

+ Add An Address

Cancel ✕ < Previous **Submit >**

15. Add any additional property/building addresses as applicable.

16. 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: Test Guide

Addresses added to this property:

1515 [REDACTED] AVE ✕

+ Add An Address

Cancel ✕ < Previous **Submit >**

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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: Test Guide

Addresses added to this property:

1515 [REDACTED] AVE 



Cancel   



 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 [REDACTED] X

9407 [REDACTED] 



Cancel   

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

17. Click **Return to Dashboard**.

Property Profile Confirmation

Your property profile has been saved.

Print

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

Property

Property Name	Test Guide
Property ID	22675
Buildings Added	1
Associated Addresses	1515 [REDACTED] AVE [REDACTED] 91770

[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.

Benchmarking Dashboard

[Home](#) > [Data Sharing & Download](#) > 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 ? >](#)



Test Guide
Action Required

ROSEMEAD, CA
91770

1 Buildings



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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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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**.

Benchmarking Dashboard

[Home](#) > [Data Sharing & Download](#) > 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 ? >



Test Guide
Action Required

ROSEMEAD, CA
91770

1 Buildings



Edit

+ Add Building

What's this ? >



Test Guide
ACTION REQUIRED

0 Meters

Add Tenants >

Close X

1

2

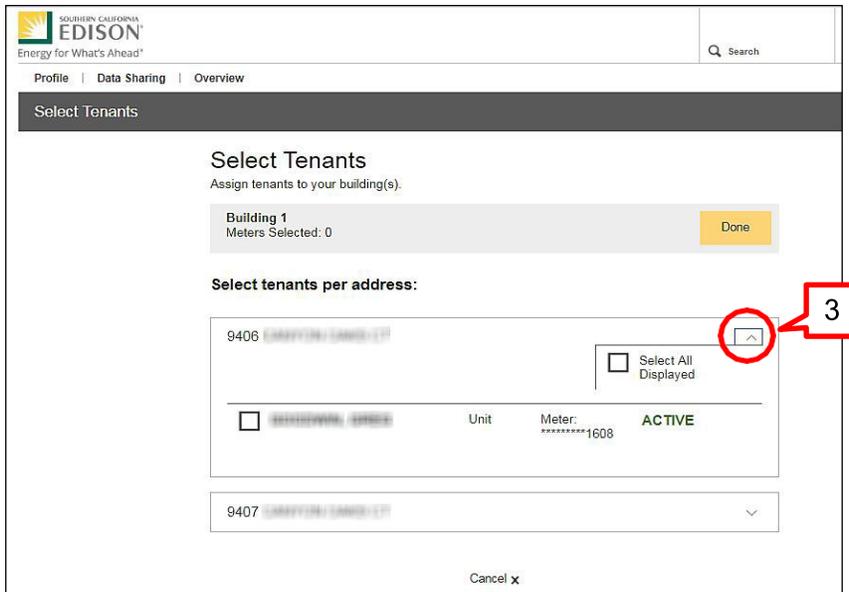
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NOTE Blocks are color-coded: red means that action is required, and green means no action is required.

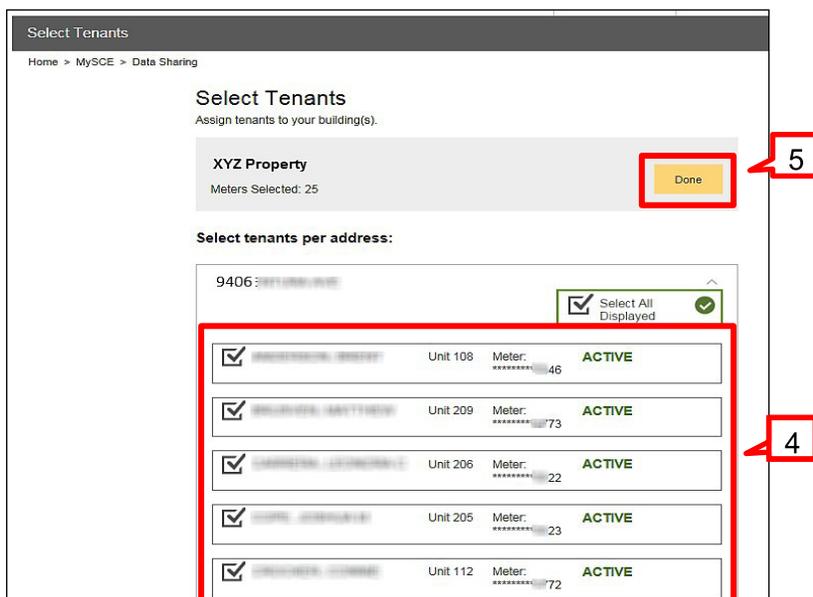
The *Select Tenants* window displays.

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



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**.

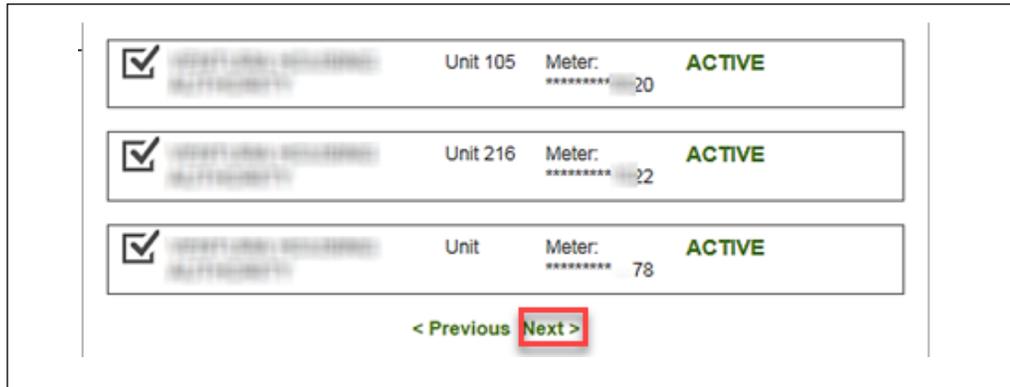
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NOTE

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.



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.**

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6. Click **Return to Dashboard**.

The screenshot shows the Edison Energy dashboard. At the top, there is a search bar and navigation links for Profile, Data Sharing, and Overview. The main heading is 'Data Sharing Key' with a sub-heading 'You have successfully mapped meters to your building.' Below this, a 'Next Step' section explains that the user can now enter the Data Sharing Key into their ENERGY STAR Portfolio Manager. A red box highlights the key '0DYDTT7URR' next to a magnifying glass icon. To the right of the key is a link 'How to add your Data Sharing Key to Portfolio Manager >'. Below the key section, there are two tables: 'Property' and 'Buildings'. The 'Property' table lists: Property Name (XYZ Property), Property ID (3048), and Buildings Added (2). The 'Buildings' table lists: Building Name (Building 1), SCE Building ID (3411), and Public Disclosure Compliance (No). At the bottom right, a green button labeled 'Return to Dashboard >' is highlighted with a red box and a callout bubble containing the number '6'.

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

The screenshot shows the Portfolio Manager dashboard for 'XYZ Property' in Rancho Cucamonga, CA 91730, with 2 buildings. A red 'ACTION REQUIRED' banner is visible. Below the property information, there are buttons for 'Add Building' and 'What's this? >'. An 'Edit' button is also present. A table lists 'Building 1' with 5 meters and a red 'ACTION REQUIRED' banner. Below the table, a black bar contains the text 'Enter Data Sharing Key >' with a red arrow pointing to the right.

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.

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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 If you are an authorized 3rd party agent, **DO NOT** use the client's Customer Account Number (CA) and billing zip code. The system will validate your SCE.com account against the building owner's account to determine whether tenant authorization is required. Users logged in with a linked account can skip to step 10.

- Once tenants are selected and you click the **Done** button, you are prompted to provide a **Customer Account Number (CA)**, if you have one. If you click Yes, proceed to 8a below. If you click No, proceed to 8b.
- Click **Yes** to link your CA Number to the building and enter your **Customer Account Number** and **Billing Zip Code**. The **Customer Account Number** is 12 digits long and starts with a 7 (7XXXXXXXXXX).
- Click **Next**.

The screenshot shows a web interface for linking a customer account number. On the left is a navigation menu with 'Data Sharing & Download' selected. The main content area is titled 'Link Your Customer Account Number' and contains a form. The form has a section 'Customer Account Information' with 'Property : 1' displayed. Below this is a question: 'Do you already have an SCE Customer Account Number?'. Underneath is a sub-section 'Why are we asking this?' with explanatory text. There are two radio button options: 'Yes' (selected) and 'No, I don't have one'. The 'Yes' option is enclosed in a red box, with a callout '8a' pointing to the 'Customer Account Number' input field. This field has a placeholder '12 digit number that starts with 7 7XXXXXXXXXX' and a help icon. Below it is the 'Billing ZIP Code(#####)' field. At the bottom of the form are 'Cancel x', '< Previous', and 'Next >' buttons. The 'Next >' button is highlighted with a red box and a callout '9a'. A red circle with the number '7' is positioned above the 'Customer Account Number' field.

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

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 page title is 'Link Your Customer Account Number'. The main heading is 'Customer Account Information'. The property is 'XYZ Property'. The question is '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 are fields for 'Your Name', 'Phone Number', 'Mobile', and 'Tax ID', all of which are filled and have green checkmarks. A '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.

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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. Electronic signatures are acceptable.

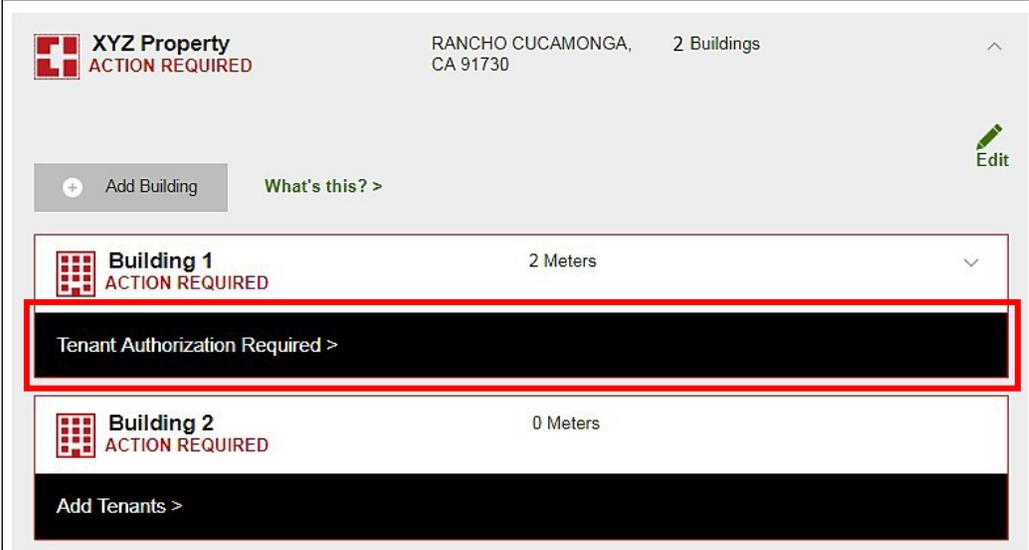
The screenshot shows the Edison Energy Portfolio Manager interface. At the top, there's a search bar and navigation tabs for Profile, Data Sharing, and Overview. The main heading is 'Data Sharing Key'. Below it, a message states 'You have successfully mapped meters to your building.' A prominent warning box in red says 'TENANT AUTHORIZATION REQUIRED Data cannot be shared until all authorizations are received and approved.' Below this, there's explanatory text about authorization requirements. A section titled 'Tenant Data Disclosure Letter' lists two tenants with their addresses and meter IDs. For each tenant, there are two links: 'Authorization Form >' and 'Instruction for Authorization Form >'. Red boxes and callouts labeled '10' and '11' highlight these links. Below the tenant list, a 'Next Step' section provides instructions on how to use the Data Sharing Key '9LF4TT76JH'. A red box highlights this key. A link 'How to add your Data Sharing Key to Portfolio Manager >' is also present. At the bottom, a 'Return to Dashboard >' button is highlighted with a red box and callout '12'.

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

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The Benchmarking Dashboard displays, showing that action is required.



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

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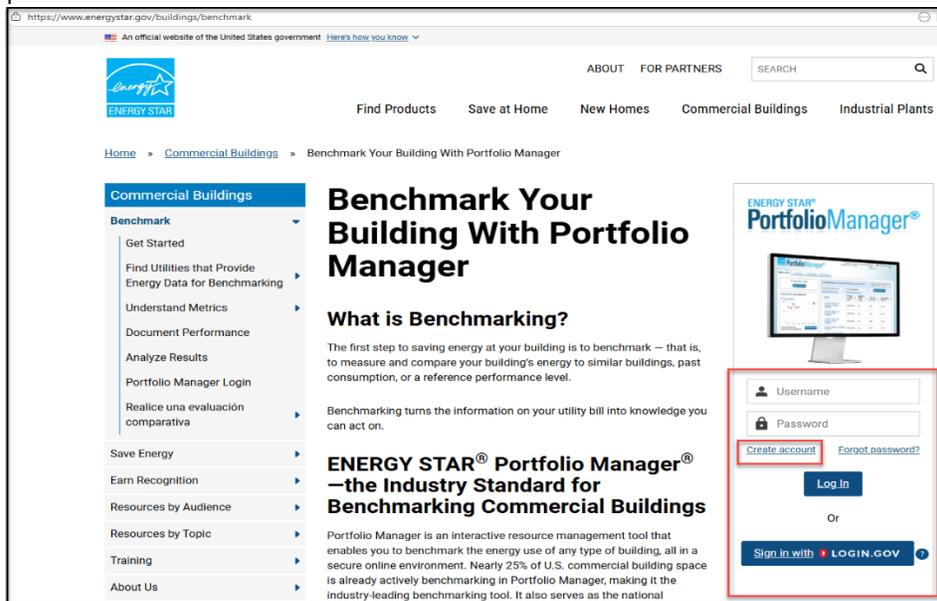


Create a Portfolio Manager Account

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 **Create account** to create an Account and proceed to 3 below.

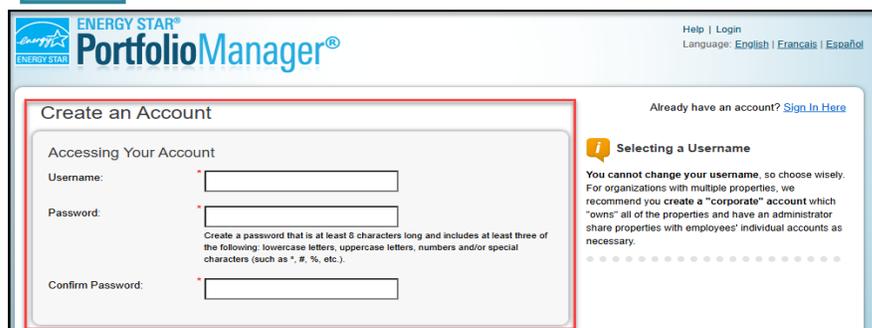
If you already have a Portfolio Manager account, enter your username and password, click **LOG IN**, and proceed to the next section.



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.



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4. 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.

About Yourself (Enter your professional or business contact information)

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: *

i **First & Last Name for Organizations**

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

.....

Understanding Your Building's Energy Performance

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



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.

About Your Organization

Organization Name: *

Primary Business or Service of Your Organization: *

Is your organization an ENERGY STAR Partner? Yes No

Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?

Do you want your username to be searchable by other Portfolio Manager users? You must select "Yes" if you want to connect with other users to allow automatic upload of utility data or to share properties. Yes No

Confirm Your Identity

Please confirm that you are a human I'm not a robot  reCAPTCHA Privacy - Terms

[Create My Account](#) [Cancel](#)

Primary Business or Service

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

Connecting with Others in Portfolio Manager

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

- Once you have entered all information on the page, click **Create My Account**.

Understanding Your Building's Energy Performance

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

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

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

ENERGY STAR
Portfolio Manager

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

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**

Or: **Sign in with** **LOGIN.GOV** ?

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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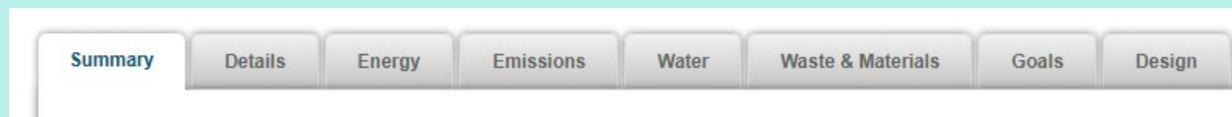


Set Up a Property in Portfolio Manager

Tip: Navigating within Portfolio Manager is simple using the four tabs (**MyPortfolio**, **Sharing**, **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.



Within the **MyPortfolio** tab, you will see another set of property-level tabs. With these tabs, you can navigate between a summary of the building, property details, and meter data. You can also set and track progress against specific performance goals, and compare a building's current energy performance against the property's baseline and/or initial design.



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.



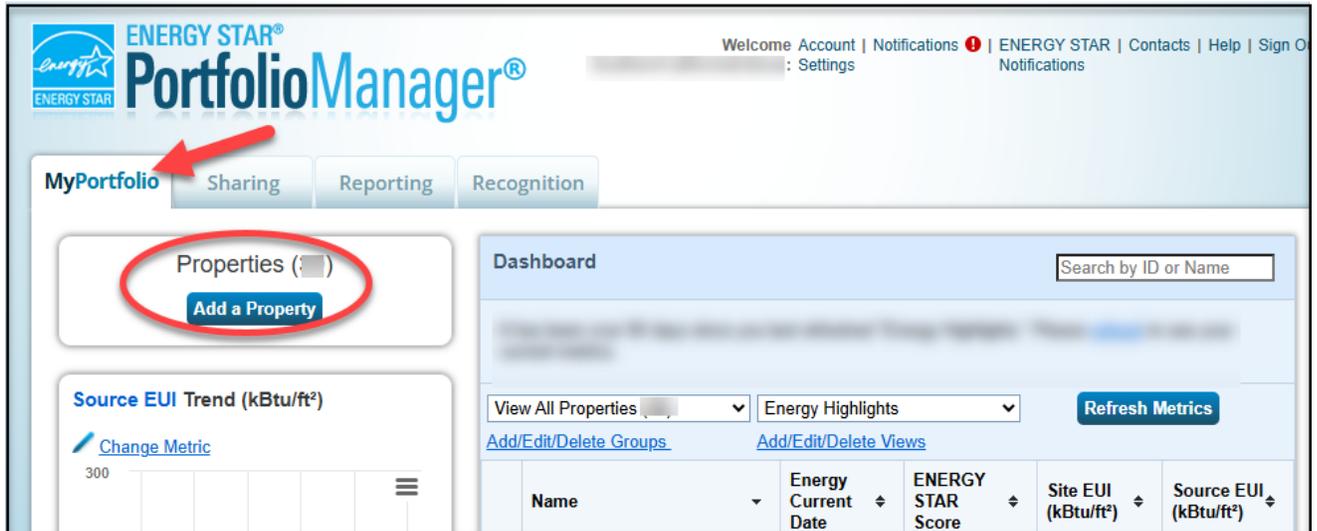
When identifying building characteristics, you are prompted to enter additional information based on the details you specify for your building (e.g., parking available, data center, hours of operation each week, etc.).

Understanding Your Building's Energy Performance

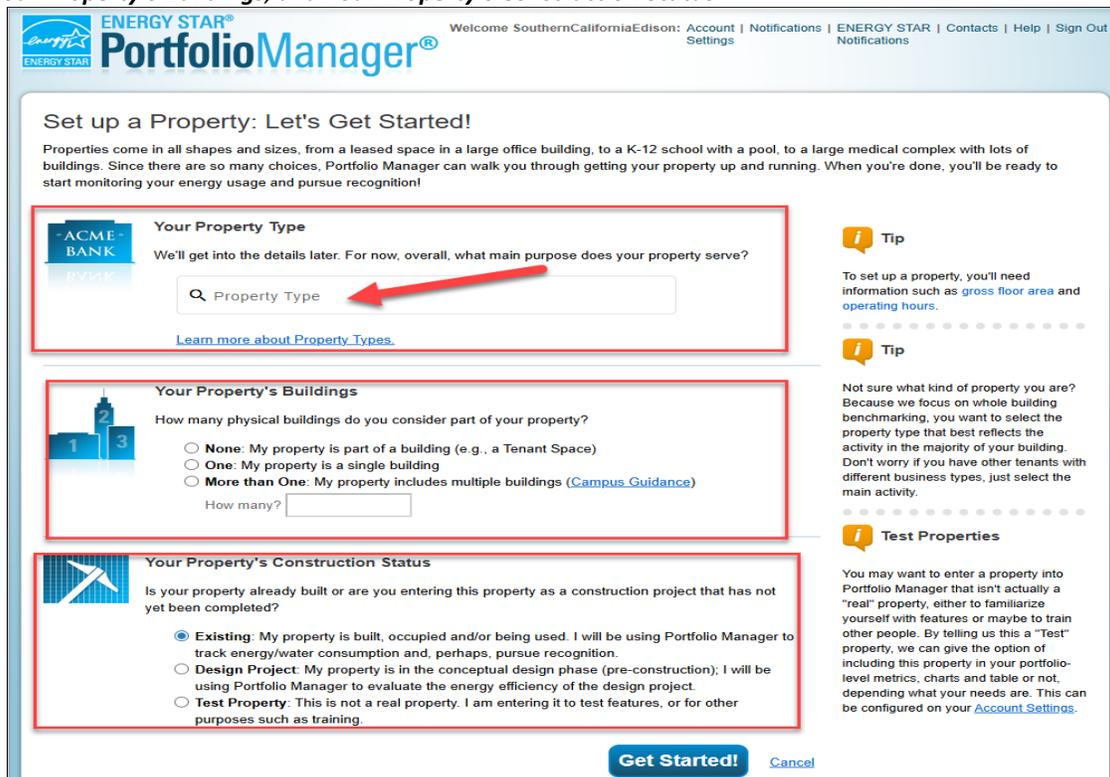
A Step-by-Step Guide to Benchmarking Using Portfolio Manager

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 Type**, **Your Property's Buildings**, and **Your Property's Construction Status**.



2. In the **Your Property Type** section, click in the window.

Understanding Your Building's Energy Performance

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

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?

Property Type
Q Medical Office X

Tip

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

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.

Property Type

Q Begin typing to search...

Banking/Financial Services

- Bank Branch
- Financial Office

Education

- Adult Education
- CEGEP
- College/University

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.

3. Designate the number of physical buildings located on your property. This is important if you plan on 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

- **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.



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.

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

**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](#).

5. Click **Get Started!**

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ENERGY STAR® Portfolio Manager®

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!

Your Property Type

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

1 **ACME BANK**

2 [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?

4

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.

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 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 property will be configured on your [Account Settings](#).

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

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6. In the **About Your Property** block, enter basic property information including **Street Address**, **Year Built**, **Gross Floor Area** and **Occupancy** percentage.

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: * XYZ Bldg

Country: * United States

Street Address: * 123 Any Street

City/Municipality: * Ventura

County:

State/Province: * California

Postal Code: * 93004

Year Built: * 1980

Gross Floor Area: * 50,000 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: * 100 %

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

Tip

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

Tip

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

7. In the **Standard IDs** block, under the **Standard ID – State/Province** drop down menu, select the California Benchmarking Reference Number. Find your Benchmarking Reference Number (BRN) here [Touchstone IQ - Building ID Tool](#). This is required for annual benchmarking reporting to the California Energy Commission (CEC).

If you have other building ID numbers, you can save them under the appropriate drop-down menu.

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Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

Standard ID - City/Town: [Dropdown] ID: [Text Box]

Standard ID - County/District: [Dropdown] ID: [Text Box]

Standard ID - State/Province: [California Benchmarking Reference Number] ID: [Text Box]

Standard ID - Other: [Dropdown] ID: [Text Box]

[+ Add Another](#)

- 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.

Do any of these apply?

- My property's energy consumption includes [parking](#) areas
- My property has a [Data Center](#) that requires a constant power load of 75 kW or more
- My property has one or more retail stores ([that are eligible for a Retail score](#)).
- My property has one or more restaurants/cafeterias

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

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

- Click **Continue**.

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

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Set up a Property: How is it used?

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

Basic Information

Name: XYZ Bldg R **Country:** US

Property Type: Medical Office **Address:** 123 Any Street [Map It](#)
Ventura, CA 93004

Year Built: 1980

Property consists of: 1 building with parking

[Edit](#)

Add Another Type of Use [Add](#)

10. 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, including but not limited to offices, exam rooms, operating rooms for outpatient surgical procedures, laboratories, lobbies, atriums, conference rooms and auditoriums, employee break rooms and kitchens, restrooms, elevator shafts, stairways, mechanical rooms, and storage areas. If you have restaurants, retail (pharmacy), or services (dry cleaners) within the Medical Office Building, we recommend you [include this square footage in the Medical Office Property Use](#).

*The medical office score does not apply to veterinary offices or standalone ambulatory surgical centers.

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	50,000 <input type="text"/> Sq. Ft. <input type="text"/>	1/1/1980 <input type="text"/>	<input type="checkbox"/>
★ Weekly Operating Hours	40 <input type="text"/> <input type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	10 <input type="text"/> <input type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
★ Number of Surgical Operating Beds	3 <input type="text"/> <input type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
★ Number of MRI Machines	1 <input type="text"/> <input type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
Surgery Center Floor Area	<input type="text"/> Sq. Ft. <input type="text"/>	1/1/1980 <input type="text"/>	<input type="checkbox"/>
Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>
Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1980 <input type="text"/>	<input type="checkbox"/>

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

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

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

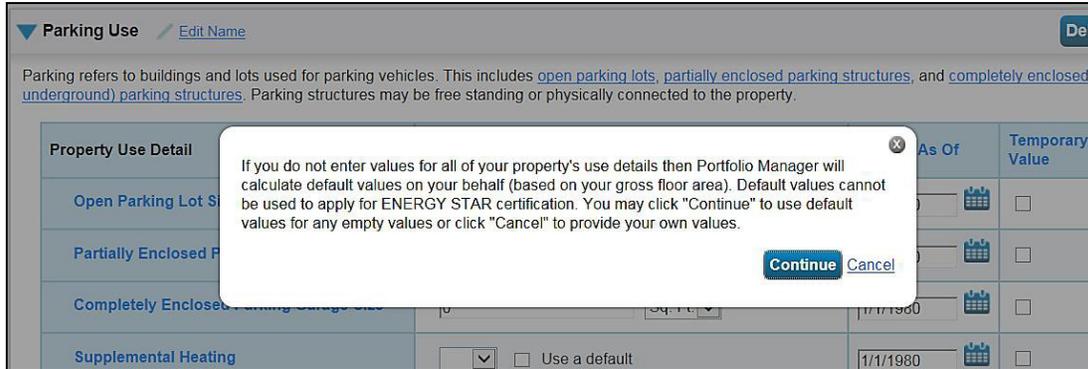
11. When you have entered all of the property information, click **Add Property**.

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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.

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



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.

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

Understanding Your Building's Energy Performance

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

MyPortfolio

Sharing

Reporting

Recognition

Congratulations! You have successfully created your property.

Next, you can:

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

XYZ Bldg R

123 Any Street, Ventura, CA 93004 | [Map It](#)

Portfolio Manager Property ID: 5821439

Year Built: 1980

[Edit](#)

Not eligible to apply for ENERGY STAR Certification

Weather-Normalized Source EUI (kBtu/ft²) Why not score?

Current EUI: N/A

Baseline EUI: N/A

Summary

! Details

Energy

Water

Waste & Materials

Goals

Design

Basic Information

Construction Status:
Existing property that is one single building

Property GFA - Self-Reported:
25,000 Sq. Ft.

Occupancy:
80% [Edit](#)

Property Uses and Use Details

[View as Diagram](#) | [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Parking Use	Parking	5,000 ft ²	<input type="text" value="I want to..."/> ▼
▶ Building Use	Medical Office	N/A ft ²	<input type="text" value="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.

Unique Identifiers (IDs)

Portfolio Manager ID:
5821439

Custom IDs: None

Standard IDs: None

! You can select from Portfolio Manager's **Standard IDs** to provide information to others in data requests. Or you can create up to three **Custom IDs** so that you can cross reference your property in other systems. [Edit](#)

Property Type

! 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.

Additional Information

Federal Property:
Not Set

Service & Product Provider:
None ([Find a SPP](#)) [Edit](#)

Property Notes

Use the following area to keep notes on your property.

You have 1000 characters remaining for your notes. [Save Notes](#)

[Delete this Property](#)

! Caution! Deleting your property is permanent.

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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.

Property Uses and Use Details

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

Name	Property Use Type	Gross Floor Area	Action
Building Use	Medical Office	50,000 ft ²	I want to...

Value Current As Of Temporary Value?

Understanding Your Building's Energy Performance

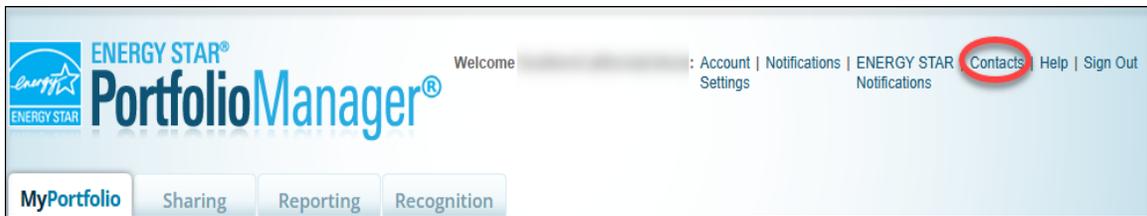
A Step-by-Step Guide to Benchmarking Using Portfolio Manager



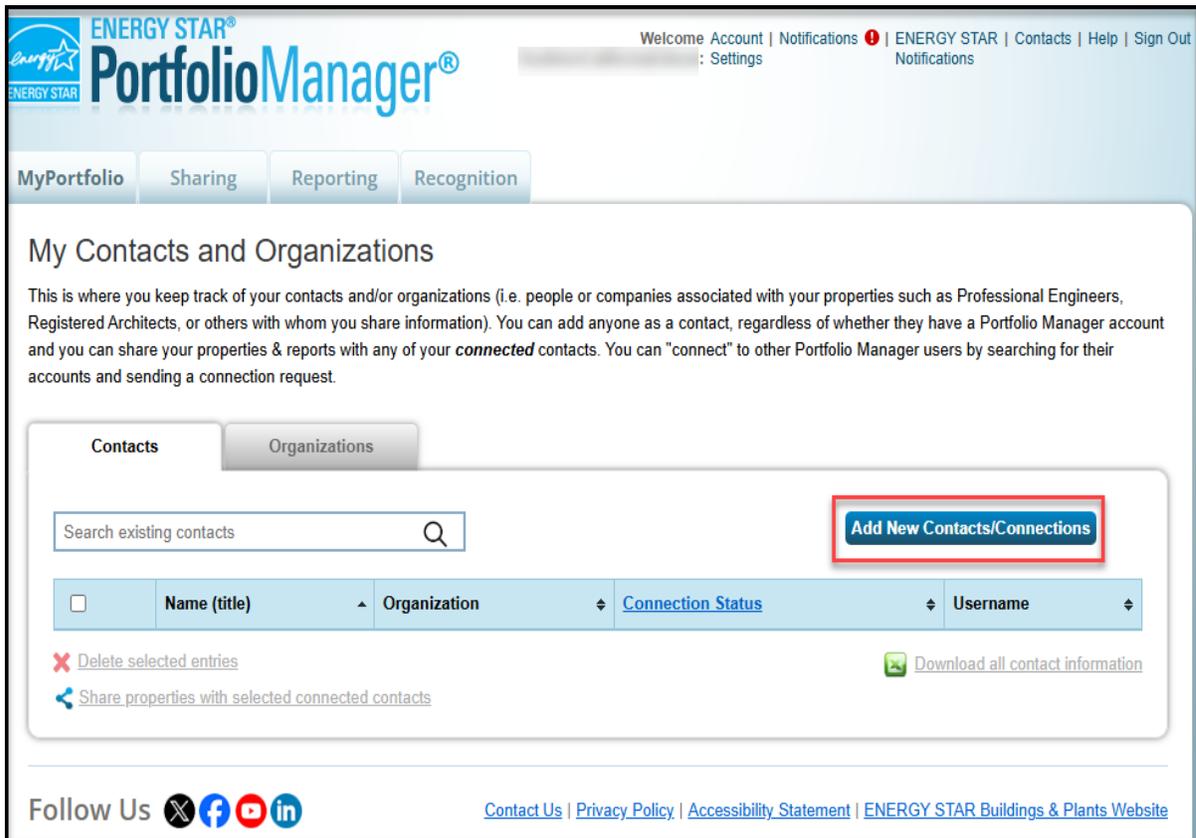
Share Data

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 New Contacts/Connections**.



The **Add Contact** window displays.

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

MyPortfolio | Sharing | Reporting | Recognition

Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact is not in your Portfolio Manager account, then you can create an entry within your personal contacts.

Connect with an Existing User for Sharing
Search using any of the criteria below.

Name: 3

Organization:

Username:

Email:

4

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

5. Click **Connect**.

MyPortfolio | Sharing | Reporting | Recognition

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

Connect

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

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6. Enter your **name, phone number, and email address** in case SCE Customer Service needs to contact you.
7. Read SCE's **Terms of Use**.
8. Check the box at the bottom of the window to indicate that you have read and agree to SCE's **Terms of Use**.
9. Click **Send Connection Request**.

Send a Connection Request to [Southern California Edison](#) to Begin Exchanging Data

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 Customer Service](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Your Name: * Example: Jane H. Doe
Your name, in case SCE Customer Service needs to contact you ; 5 - 60 Characters

Your Phone Number: * Example: (626)555-5555 x555
A number at which SCE Customer Service may contact you, if necessary ; 13 - 20 Characters

Your Email Address: * Example: scecustomer@aol.com
An email address at which SCE Customer Service may contact you, if necessary ; 6 - 60 Characters [More Information](#)

Terms of Use:

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

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

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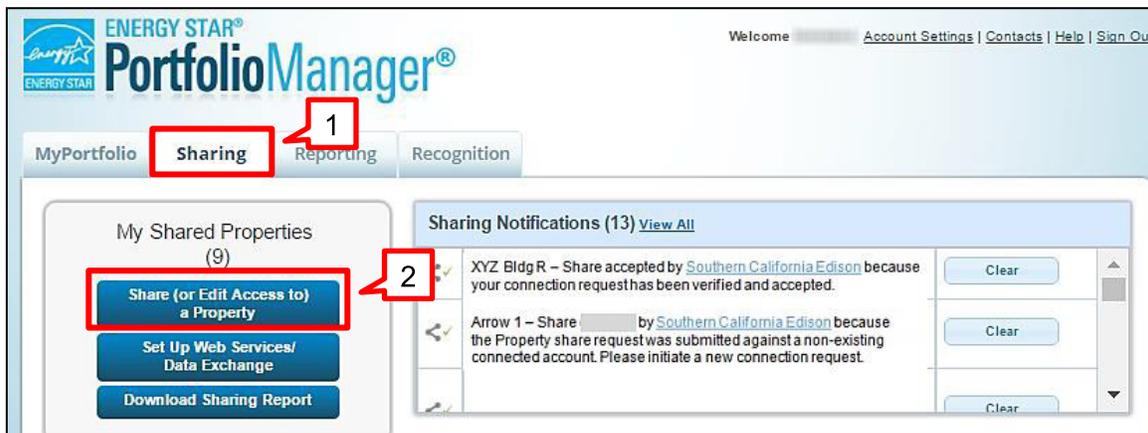
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Once your request is approved, you will see a notification on the **MyPortfolio** tab that you are connected to Southern California Edison.



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 to) Properties** page displays.*

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3. Select the **Property** to be shared by clicking on **Select Properties**.
 - 3a. Select the **Property Name**.
 - 3b. Click **Apply Selection**.
4. Select the **Account** to share with.
5. For **Choose Permissions**, click the radio button next to **Personalized Sharing & Exchange Data ("Custom Orders")**.
6. 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 **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?

Selected Properties: 1

2 **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 (SCEDISON)

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

3 **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, 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.

3 **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 "Contacts" page and search for them under "Add Contact" or "Add Organization" (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. When they accept your connection request, they will show up on the list to the left.

i **Exchanging Data with Web Service Providers?**

If you need to share your property(ies) with a Web Service Provider or Utility, use the ["Set Up Web Services/Data Exchange"](#) page.

NEW **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.

Continue

[Cancel](#)

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Select Properties (only properties you have permission to share are shown below)

Search: Selected Properties: 1 ([View Selection](#))

<input type="checkbox"/>	Name	Part of Larger Property	Property Type	State/Province
<input checked="" type="checkbox"/>	Southern California Edison	Not Applicable: Single Building	Office	CA

[First](#) [Previous](#) Page 1 of 1 [Next](#) [Last](#) 100

Selected Properties: 1 ([View Selection](#))

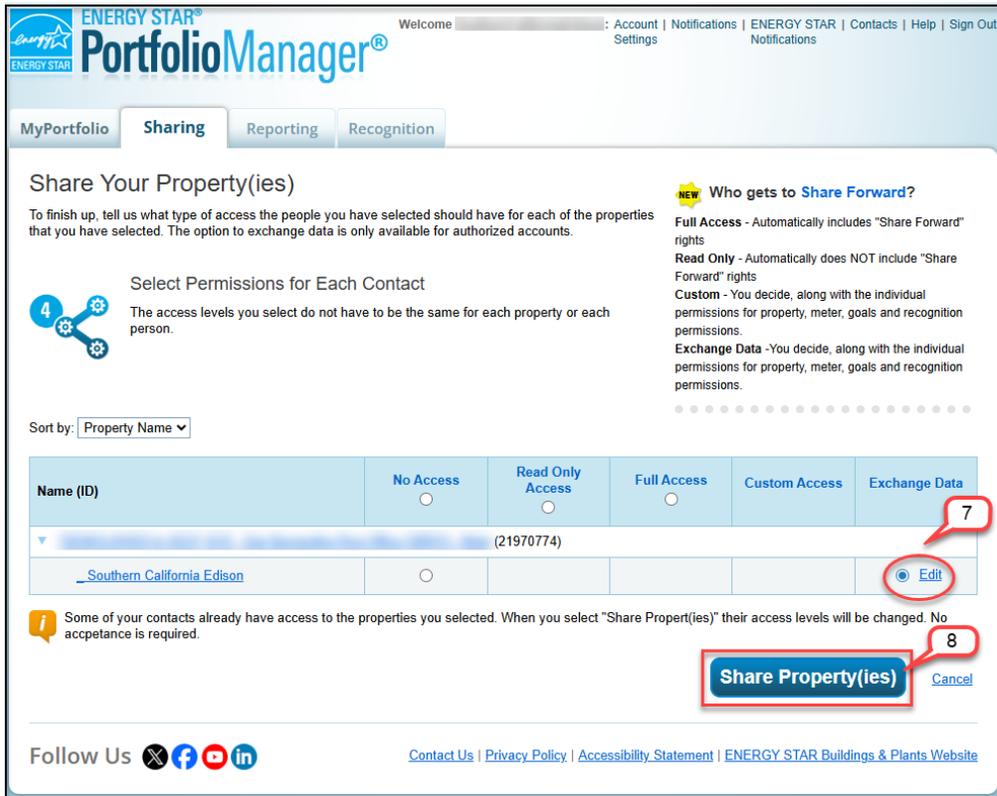
[Apply Selection](#) [Cancel](#)

The Share Your Property(ies) page displays.

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

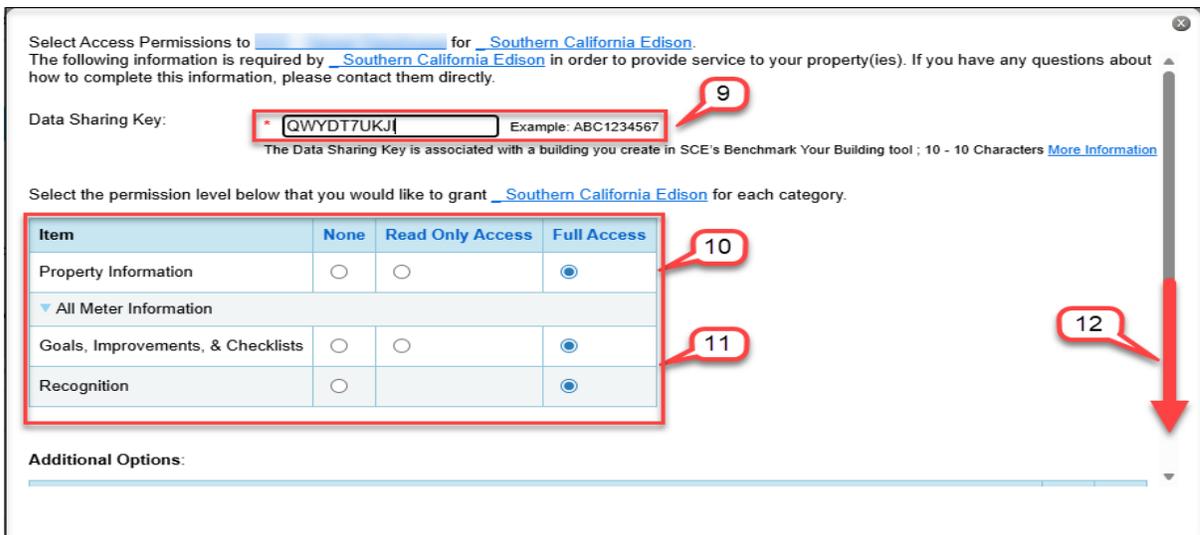
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A dialog box displays where you can enter your **Data Sharing Key** obtained when you registered your building with SCE and designate the level of access to give.

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



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

Select Access Permissions to [SCE - Hemet Warehouse](#) 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 type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Recognition	<input type="radio"/>		<input checked="" type="radio"/>

Additional Options:

Item	Yes	No
* Share Forward Allow Southern California Edison to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

Apply Selections & Authorize Exchange [Cancel](#)

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

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

ENERGY STAR® PortfolioManager®

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

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
(87398424)	<input type="radio"/>				
Southern California Edison	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/> Edit

Share Property(ies) [Cancel](#)

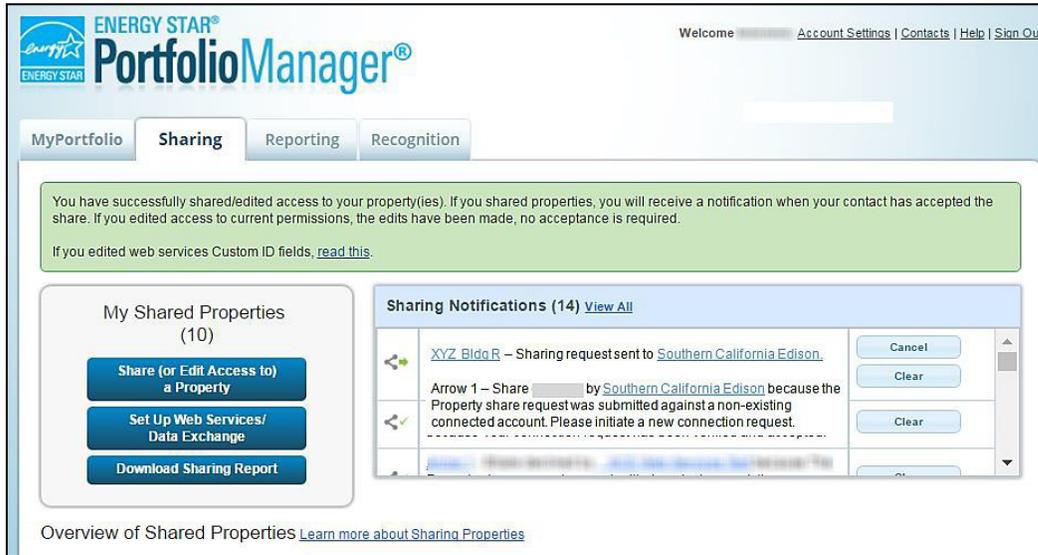
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You are returned to the main page on the Sharing tab.



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 recorded webinars, demo videos, and how-to guides at:

<https://www.energystar.gov/buildings/training>

The screenshot shows the Energy Star Portfolio Manager website's training hub. At the top, there's a navigation bar with 'ABOUT' and 'FOR PARTNERS' links, a search box, and a secondary menu with 'Find Products', 'Save at Home', 'New Homes', 'Commercial Buildings', and 'Industrial Plants'. The breadcrumb trail reads 'Home » Commercial Buildings » Training'. A left-hand sidebar lists various resources under 'Commercial Buildings' and 'Training'. The main content area is titled 'Training' and features five cards: 'Live Online Training' (with a woman on a laptop), 'How-To Guides' (with a document), 'Demo Videos' (with a video player), 'Watch Now: Recorded Webinars' (with a laptop showing a dashboard), and 'Slide Library' (with a PowerPoint slide). Each card includes a short description of the resource.