

# Step-by-Step Instructions for State Agencies, Colleges and Universities Benchmarking Buildings

## DES Energy Program

Using the EPA Portfolio Manager

1. **Start by viewing the [Express Videos](#)** on the EPA Portfolio Manager website. Other helpful information is available on the [Training](#) webpage. Review the [Frequently Asked Questions \(FAQ\) for Washington State Agencies](#), which contains answers to questions most often asked by agencies and colleges. Reading the FAQ is important to save time and avoid missteps.
2. **Talk to your agency, college or university point of contact for instructions on using your agency master account**, and sharing with others in your agency. Your agency point of contact may instruct you to use the established master account which bears your agency name, or may instruct you to create an account and share access with the college or agency master account. Each agency will organize their accounts according to their need to manage and access information internally. Your account will have a user name and password. You control access to your account. You can share your account with other users, and you define what level of access they have (read only, entering utility data, and/or updating facilities characteristics). Determine who in your agency needs access, and what type, when deciding how to share your account access. Please update account details such as name and email address when a new person takes responsibility for your Portfolio Manager account.
3. **Follow the instructions in the Express Videos (see #1 above) to create “Properties” in your Portfolio Manager account.** The Portfolio Manager calls a building a “Property.” Here is the format for every state agency or higher education Property Name in Portfolio Manager: **agency abbreviation, campus (if applicable), building name. For example, DOC SCCC Admin Building or WSU Vancouver Library.** You can use as many as 60 characters for your Property Name, but it is probably more practical to keep it short. It is very important to use this naming format, so that an alphabetical sort groups the buildings by agency and campus. If you have a campus, create the buildings in Portfolio Manager first, then [create a campus](#) and add buildings to the campus. If you have difficulty entering your building into the Portfolio Manager, see the Frequently Asked Questions and other resources on the [DES Energy Program Portfolio Manager](#) webpage. If you are unable to resolve your problem, use the contacts provided to call or email for assistance.
4. **Enter the Office of Financial Management (OFM) Facility Inventory System (FIS) Unique Facilities Identification (UFI) number for each building.** OFM

has provided each facility with a unique identifier called the OFM Unique Facilities Identification (UFI) number. This unique identifying number connects the Portfolio Manager data with all other information about this facility in the state database. Open the Facility in Portfolio Manager. Click on the “Details” tab. In the “Unique Identifiers” box at the bottom left side of the page, select “Edit.” In the “Standard IDs” box at the bottom of the page, use the drop-down menu to choose “State of Washington Unique Facilities Identifier (UFI). Enter only the 6 character alphanumeric UFI in the ID field to the right. Be sure to click on “Save” at the very bottom of the page. **It is very important to enter a UFI number for each facility in Portfolio Manager, to correctly associate building energy use with building characteristics in the OFM database, and to confirm that all state buildings over 10,000 gsf or on campuses over 10,000 gsf have been benchmarked in Portfolio Manager.**

5. **Follow instructions in the Express Videos to create spaces and meters, and enter utility data into your Portfolio Manager account.** If you have difficulty, see the Frequently Asked Questions and other resources on the [DES Energy Program Portfolio Manager](#) webpage. If you are unable to resolve your problem, use the contacts provided to call or email for assistance.
6. **[Share the properties in your account](#) with the Department of Enterprise Services (DES),** giving read-only access, so that DES can post the energy use of your facilities for public viewing, and create reports. Buildings on a campus, and the campus itself, must each be specifically shared to give access.