

Frequently Asked Questions (FAQ) for Washington State Agencies, Colleges and Universities

DES Energy Program

Benchmarking Using the EPA Portfolio Manager

Q. Where can I find more information about Portfolio Manager?

A. The ENERGY STAR Portfolio Manager Overview page is the place to start, at www.energystar.gov/benchmark. Also, [Portfolio Manager Help](#) files are a great source of information.

Q. What is the Portfolio Manager and what will it do for state agencies?

A. The EPA Portfolio Manager is an interactive energy management tool to track and assess energy and water consumption across the entire portfolio of state agency buildings in a secure online environment. The Portfolio Manager software, database, data storage, technical support and training are provided by EPA at no cost to state agencies. Agencies will use Portfolio Manager to identify under-performing buildings, verify efficiency improvements, track agency goals for reducing energy use, and collect building energy use data for reporting greenhouse gas emissions.

Q. Where can I find the benchmarking requirements for qualifying public agencies?

A. [See RCW 19.27A.190](#) for building energy benchmarking requirements. Definitions are at [RCW 19.27A.140](#).

Q. Where can I find training?

A. The DES Energy Program provides links to training and other resources at <http://www.des.wa.gov/services/facilities/Energy/EnergyStar/Pages/default.aspx>

Q. How do I enter my buildings into Portfolio Manager?

A. Get started with the [Benchmarking Starter Kit](#), which includes a [Data Collection Sheet](#) and [Quick Reference Guide](#). Next, view the introductory Portfolio Manager training session, [Four Steps of Benchmarking Using Portfolio Manager](#). There is audio, so be ready to turn down the volume. This animated session load time will depend on your Internet connection speed and load at the time (it may take a few minutes). For additional training, view the other sessions on the EPA Portfolio Manager Web site.

Talk to your agency point of contact for instructions on using your agency master account, and sharing with others in your agency. The Portfolio Manager, like OFM, calls a building a "Facility." The format for every Facility Name is as follows:

- **Agency abbreviation, campus (if applicable), building name** (without commas in between)
- For example:
 - DOC SCCC Admin Building
 - WSU Vancouver Library

You can use as many as 60 characters for your Facility Name, but it is probably more practical to keep it short. **It is very important to follow this naming format, so that alphabetizing the list sorts the facilities by agency and campus.**

The Office of Financial Management (OFM) has provided each facility (building) with a Unique Facilities Identification (UFI) number. To enter the UFI number for a building: Open the Facility in Portfolio Manager. Select "Edit" at the top right of the page. When the edit window opens, scroll down to the bottom to find the "Unique Building Identifier" data field. Enter only the 6 character alphanumeric UFI in this field. Be sure to click on "Save" at the 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.**

If you have difficulty using the Portfolio Manager, use the resources and links on the [DES Energy Program Portfolio Manager](#) web page to resolve your questions or get assistance.

Q. Will utilities upload my energy use data into Portfolio Manager automatically, and if so, when?

A. See [RCW 19.27A.170](#). On and after January 1, 2010, utilities that serve more than 25,000 customers will maintain records of the energy consumption data for public agency buildings to which they provide service, in a format compatible for uploading to EPA's Portfolio Manager. The utility will upload the energy consumption data to Portfolio Manager upon customer request. The utility will require your written authorization. Contact your local utility to find out how to initiate this data uploading.

You will have to enter data manually if your utility serves fewer than 25,000 customers. Fuel oil, propane and other fuel types will have to be entered manually. Use the Multi-Facility Meter Update spreadsheet if you are manually entering energy data for many meters or fuel types (For instructions, see [Portfolio Manager Online Help](#). Click on My Portfolio, and choose Multi-Facility Meter Update).

Q. Our campus has many buildings served by one gas meter, one water meter, and several electrical meters. How do I enter my buildings, which are not separately metered, into Portfolio Manager?

A. Many state buildings are on campuses and share meters. Without metering individual buildings, the facility operator cannot closely manage the energy use of the buildings. Every

new state agency building must now be separately metered at the time of construction. Consider planning how to meter existing buildings. Meanwhile, even if individual buildings are not metered separately, you can enter your facilities into Portfolio Manager, create a campus, create campus meters, and associate buildings with the meters that serve them. See [Portfolio Manager Online Help](#) for more information about creating campuses. The campus feature within Portfolio Manager provides energy managers with a central view of all campus facilities and a calculated combined energy usage based on combined floor space.

Q. None of the buildings on our college campus are rated building types, so we can't benchmark them. What good will it do to enter them into Portfolio Manager?

A. Any building can be benchmarked, regardless of whether it is a rated building type. The term benchmark is sometimes used to refer to measurement against some accepted standard, which could refer to a rating system. For state agency and college buildings, the benchmark is the current energy use of the building itself, which will be used to measure improvement. From RCW 19.27A, "Benchmark' means the energy used by a facility as recorded monthly for at least one year and the facility characteristics information inputs required for a portfolio manager." Energy use recorded and tracked over time will be used to measure your success in meeting energy and greenhouse gas reduction goals. Hopefully more rated building types will be added in the future to EPA's Portfolio Manager, so you can also compare your building to similar existing buildings.

If a "space type" does not match definitions in Portfolio Manager, users should not try to "force" the building into one of the building types in order to receive an EPA rating. To see a list of buildings that can receive a score and eligibility requirements, please visit the [Criteria for Rating Building Energy Performance](#) webpage. Any building that does not fit into one of these building types should be entered as "Other" space type in Portfolio Manager.

EPA is always working to develop rating criteria for additional segments of the commercial building market. For those buildings that are not eligible to receive a rating, EPA has created a list of reference [energy performance targets](#). These are based on average energy use calculated across different types of buildings. These energy performance targets are not normalized for climate nor adjusted for activities which may affect energy use. All targets are expressed in energy use intensity and are derived from the Commercial Buildings Energy Consumption Survey.

Q. It would be easier to enter facilities into Portfolio Manager as a campus, rather than enter each building in as a facility. Can I do this?

A. Enter each building as a facility. The OFM Unique Facilities Identification (UFI) number for each of your buildings will be used for all kinds of reporting and tracking. If you do not use the OFM UFI number in the Portfolio Manager, it will create difficulties in identifying your buildings and correlating them with reported energy use. The OFM UFI number will be used to associate the energy use of each building with its characteristics in the OFM Facilities Inventory System. This information will be used to post building energy use for public viewing, and create reports required by law.

Q. We are a large agency with buildings all over the state, many of them small and isolated. Is there a way for a single person to enter energy use data for many facilities, rather than ask each building manager to learn and use EPA's Portfolio Manager?

A. It is possible to collect energy use data on an Excel spreadsheet and upload the data from the spreadsheet into the Portfolio Manager account for various facilities. Even if he or she does not enter the data into Portfolio Manager, it is best practice for the facility operator who is managing the energy use of the building to see and report on the utility billings to the business manager on a monthly basis. Feedback from utility bills can flag leaks, billing errors, or increases in energy use, allowing the facility operator and business manager to make corrections to avoid further losses.

Q. Does Portfolio Manager account for climate differences between Eastern and Western Washington? Does it account for temperature differences from year to year, such as in an exceptionally hard winter?

A. Yes, weather-normalization is an automated process in Portfolio Manager that mathematically adjusts actual energy data (site energy use) so it represents energy typically used in an average year for the same location. This accounts for weather differences from year to year that may result in abnormally high or low energy consumption. Portfolio Manager requires at least 11 consecutive periods of energy data during a year to calculate weather-normalized data. To compare the energy performance of two similar buildings in different climates, or the performance of a single building from year to year, refer to the weather normalized source energy use intensity, which is calculated in Portfolio Manager using site energy use data entered by the user. Weather normalization is available for facilities (buildings), but not campuses.

Q. What is source energy?

A. Source energy represents the total amount of raw fuel that is required to operate the building. It incorporates all transmission, delivery, and production losses, thereby enabling a complete assessment of energy efficiency in a building.

[Methodology for Incorporating Source Energy Use](#) provides an explanation of the distinction between site and source energy consumption methodologies. The document also provides details on the policy for incorporating renewable energy, the philosophy behind the use of national factors, and specific calculations used to derive each conversion factor.

EPA's national energy performance ratings evaluate the performance of buildings that use all types of energy. To compare this diverse set of commercial buildings equitably, the ratings must express the consumption of each type of energy in a single common unit. EPA has determined that source energy is the most equitable unit of evaluation.

Q. My campus is served by a central steam plant. I use natural gas boilers to create the steam. I have meters on some buildings which tell me approximately how much steam energy each building is using. How do I enter the buildings and meters on this campus into the Portfolio Manager?

A. Enter your facilities (buildings) into the Portfolio Manager. Enter the utility meters (for which you pay utility bills) into the Portfolio Manager, including any natural gas meters which provide energy for creating steam. [Instructions on creating campus meters](#) are available online. In the online help, choose “My Portfolio,” then “Campuses,” then “Add an Energy Meter to a Campus,” for information on how to do this. You can also create facility (whole-building) energy meters in Portfolio Manager for the steam energy meters which you have set on each building. You choose which meters are counted toward your total energy use. The key thing to remember is that you want the Portfolio Manager to add up the total energy purchased from utilities, and not count it again after it is converted to steam, hot water, or chilled water. When all your buildings are metered, you can transition to counting your energy use at each building. The actual fuel consumption for the campus from utility meter readings and purchased fuel should equal the total of all whole-building submeters. You will identify losses or discrepancies, as steam metering at the building level is approximate. You can prorate this energy discrepancy among the buildings, or report it separately. Ideally, utility meters and fuel purchases should be tracked in Portfolio Manager, and whole-building submeters should be tracked in Portfolio Manager.

Q. We have had personnel and budget cuts. My staff does not have time to learn the Portfolio Manager and enter this data. We don't have funds to hire someone to do this for us.

A. Talk to other facility managers who were already using Portfolio Manager prior to this requirement, to determine how much effort it will require to enter your buildings, and what the benefits are. Training and technical assistance are available at no cost. It should take less than an hour to create an account and enter your first building into the Portfolio Manager, if done by someone who knows the building and its operations. Other buildings will take less time, as you become familiar with the program. If you have more than 10 buildings, you can use an Excel spreadsheet to list your buildings, then email it to EPA, and they will upload your data into Portfolio Manager for you. For instructions, [go to Portfolio Manager online help](#). Under “My Portfolio,” “Managing Facility Data,” select “Import Facility Data”. If you have not had a GA Energy Program energy audit within the last 5 years or more, or if your last audit was partial, you may be able to get your buildings entered into Portfolio Manager as part of an energy retrofit which pays for itself from energy savings. If you are in Puget Sound Energy territory, you may qualify for incentives to help you fund a Resource Conservation Manager (RCM), whose salary would be paid for by his or her energy- and cost-saving activities. The PSE RCM program includes training for the RCM and Utility Manager software, which can be used to electronically transfer data into your Portfolio Manager account. To learn more about how to transfer data into Portfolio Manager, please contact your Utility Manager software account manager (Note: Many Utility Manager users are experiencing incompatibility problems between that program and Portfolio Manager. Please contact your Utility Manager software account manager to resolve). An RCM can enter your facilities into Portfolio Manager for you. Alternatively, you may find a champion in your business office or facilities team, or a college intern, who is enthusiastic about environmental responsibility and wants to enter your buildings into Portfolio Manager. If you use Portfolio Manager to track and pursue energy savings, the time you spend entering the data will pay for itself many times over.

Q. Will anyone else be able to see my Portfolio Manager data, or change it?

A. Portfolio Manager is an interactive energy management tool that allows you to track and assess energy and water consumption across your entire portfolio of buildings in a secure

online environment. You control access to your Portfolio Manager account. You can share your account with other users, and you define what level of access they have (four access levels from Read Only to Facility Editor). Determine who in your agency needs access, and what type, when deciding how to share your account access. You will share 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. The building energy use data in your Portfolio Manager account will make it easy to report to Ecology on greenhouse gas emissions due to building energy use (scope 1 and scope 2).

Q. How do I share my account with others within my agency?

A. To make it easier for you to manage energy performance across your organization, Portfolio Manager allows users who create a facility to provide access to other Portfolio Manager users. This feature allows you to control the level of access that is granted to any particular user (i.e., access can be limited from read only to full edit capability). Additionally, you can transfer the ability to control access to facility data to another user.

Providing access to data through this feature is on a facility-by-facility basis (please see Multi Facility Sharing to share access to multiple facilities at one time), and a user must have an established Portfolio Manager user account to be granted data access. Users with multiple facilities in more than one account should use this feature to consolidate all of their facilities under a single account.

Through the data sharing feature, you can do the following:

- Add a user to the facility access list
- Modify the facility access list (including changing a user's current access level)
- Remove a user from the access list
- Transfer administration of a facility and its access list to another user
- View the entire access list

Multi Facility Sharing

In addition to sharing a single facility with other users, Portfolio Manager gives you the ability to provide sharing access to many facilities at one time. This feature allows you to control the level of access that is granted (i.e., access can be limited from read only to full edit capability) to any particular user. Additionally, you can transfer the ability to control access to facility data to another user.

Through the multi facility data sharing feature, you can do the following:

Provide a User with Access to Multiple Facilities

Follow the steps below to provide a user with access to multiple facilities:

NOTE: If you share a facility with another user, that user will be able to see your username and e-mail address as the person who shared the facility.

1. From the My Portfolio page, select the Share Facilities link above your list of facilities. The Select User and Access Rights page will open.
2. Enter the Portfolio Manager username of the individual you wish to grant access or select their username from the drop down list. If you wish to share with a user with a Master Account, select the Master Account dropdown menu.
NOTE: the user must already have an ENERGY STAR username to have access granted to them.
3. Select the appropriate access rights and any additional rights you'd like to grant the user.
4. Select the group in which you wish to share the facilities. Select the **Continue** button. The Select Facilities to Share page will open.
5. In the Select Facilities to Share column, click the checkbox of each facility that you wish to share. If you wish to share all facilities, click the Select All box at the top of the column.
6. Review the rights that will be granted to the user for the selected facilities and click the **Continue** button. The Confirmation page will open.
7. Review the facilities and access rights being granted. Select the **Save** button. You will be notified that an e-mail has been sent on your behalf to the user with whom you have just shared facilities. Select **Return**. The My Portfolio page will open.

Remove a User's Access to Multiple Facilities

Follow the steps below to remove a user's access to multiple facilities:

NOTE: If you share a facility with another user, that user will be able to see your username and e-mail address as the person who shared the facility.

1. From the My Portfolio page, select the Share Facilities link above your list of facilities. The Select User and Access Rights page will open.
2. Enter the Portfolio Manager username of the individual to have access removed or select their username from the drop down list. Select the **Remove this User's Access** button. The Select Facilities to Remove page will open.
NOTE: The user must already have access granted to multiple facilities.
3. In the Select Facilities to Remove column, select the checkbox of each facility that you wish to remove. If you wish to remove access to all facilities, check the Select All box at the top of the column. Click the **Continue** button. The Confirmation page will open.
4. Review the buildings being removed. Select the **Save** button. The My Portfolio page will open.

Q. How do I share my account with the Department of Enterprise Services (DES)?

A. Please see [How to Share a Facility with DES](#).