

STEP 2 Set Up Property in Portfolio Manager

- **Create a new account** in Portfolio Manager at www.energystar.gov/portfoliomanager.

1. On the right side of the page, click the blue **Register now** button.
2. **DO NOT** use ANY special characters in your username (letters and numbers only).
3. **KEEP A RECORD** of the username and password — it is not possible to change usernames. *To recover a lost password click on the ‘forgot password’ link or submit an online request [form](#).*
4. We recommend using one Portfolio Manager account per building, so buildings can be easily transferred to a new employee, manager or owner.

What if I don't use a computer?

1. Call (206) 727-8484 and provide a mailing address.
2. Complete and return mailed forms and our staff will facilitate your computer process.

Tip Watch [Creating a Portfolio Manager Account and Entering Data](#) training video for more detailed instructions.

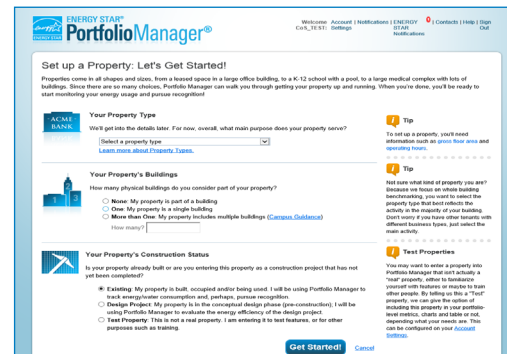
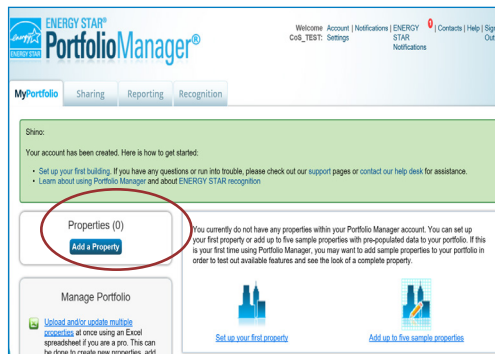
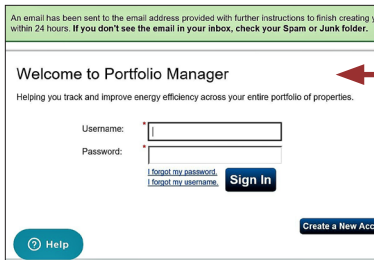
- Answer the basic questions about you and your organization.

1. For **Reporting Units**, choose “Conventional EPA Units (e.g., kBtu/ft²).”
2. For “Can other people search for you and send a connection request?,” choose **Yes**. After selecting Yes, click “**Create My Account**”.

- After creating an account, you will get an activation email to verify your account. The link must be activated within 24 hours before it expires. Once verified, re-login with your new credentials, then click on **Add a Property**.

1. Select the primary property type.
2. Select the number of buildings. Most people will select, “One: My property is a single building.” If the property is a campus (see right), please read **EPA’s Guide: [How to Benchmark a Campus](#)**.
3. For Your Property’s Construction Status, select Existing.

A campus is a set of buildings on a shared energy meter or central heating plant (not including hospitals, senior care, or K-12 schools).



How does Portfolio Manager define a Property? Portfolio Manager calls buildings “properties” and in most cases one building = one property. In Portfolio Manager, “properties” mean a contiguous parcel, not all the properties that a person may own throughout a city.

4. Click **Get Started!**

- Enter Basic Property Information** including the building name, address, year built, occupancy and gross floor area (not including parking). Under the “Do any of these apply?” section.
 1. If parking IS served by an energy meter connected to the building it serves, **SELECT** “My property’s energy consumption includes parking areas”.
 2. If parking served by an energy meter **NOT** connected to the building it serves (i.e. it is on a separate meter), **DO NOT** select “My property’s energy consumption includes parking areas”.
 3. Check other options that apply.
- Click **Continue**.
- On the next page, enter details about the primary building use, and additional property uses, based on the boxes checked on the prior page.
- The specific use details required will differ based on the property type selected. Refer to the **Property Use Details Worksheet for ENERGY STAR Eligible Buildings** in the Appendix of this guide.
 1. Hover the computer mouse over each property use characteristic for definitions.

The screenshot shows a web form titled "Building Use" with an "Edit Name" link. Below the title is a definition of "Supermarket/Grocery Store" and a note about "Gross Floor Area". The form contains a table with the following data:

Characteristic	Value	Current As Of	Temporary Value
Gross Floor Area	12000 [Sq. Ft.]	1/01/1992	<input type="checkbox"/>
Weekly Operations Hours	default <input type="checkbox"/> Use a	01/01/1992	<input type="checkbox"/>
Number of Workers on Main Shift	default <input type="checkbox"/> Use a	01/01/1992	<input type="checkbox"/>

Tip Space Uses should be summarized to reflect the total square footage of any given space type. All retail square footage should be added together, as well as office, restaurant, multifamily, etc.

2. Actual values for space details (i.e. operating hours, number of bedrooms, etc.) are required for reporting. **Do not** use “default values”.
3. The **Gross Floor Area (GFA)** that you entered when setting up your property will automatically populate into the GFA section.

Tip See Appendix **Entering Building Details and Common Portfolio Manager Errors** for further instructions on how to enter building details, multiple space uses, and parking.

NOTE If your property has multiple uses, you may want to adjust this number based on the actual GFA for the primary type of use. (Example: The building’s primary function is office and the total GFA of the whole building is 30,000 sf. It also has some retail stores totaling 10,000 sf.) When entering the attributes for the primary space type (office), change GFA to reflect JUST the office space: 20,000 sf. Next click “Add Another Type of Use” to enter the attributes and remaining square footage for the building’s retail space.

Additional Uses?

- Add more space uses to your property by selecting an option in the drop down menu **Add Another Type of Use**, and then click “Add”. This will open up a different list of attributes for that particular space type.