

Create A New Account with Energy Star Portfolio Manager

1. To begin this process, you will need to select 'Create a New Account' on the [Energy Star Portfolio Manager](#) website.

ENERGY STAR®
PortfolioManager®

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

Welcome to Portfolio Manager
Helping you track and improve energy efficiency across your entire portfolio of properties.

Username: *

Password: *

[I forgot my password.](#)
[I forgot my username.](#) **Sign In**

Create a New Account

ENERGY STAR Buildings Homepage

Take a Training

Learn More About Portfolio Manager

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

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2. Enter in all pertinent information to create your account.

- a. When filling out the 'About Yourself' section, please note the 'Reporting Units' must have the 'Conventional EPA Units' option selected.

Reporting Units:

Conventional EPA Units (e.g., kBtu/ft²)

Metric Units (e.g., GJ/m²)

- b. In the 'Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?', please ensure that 'Yes' is selected. This allows you to connect with Columbia REA and receive your data.

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.

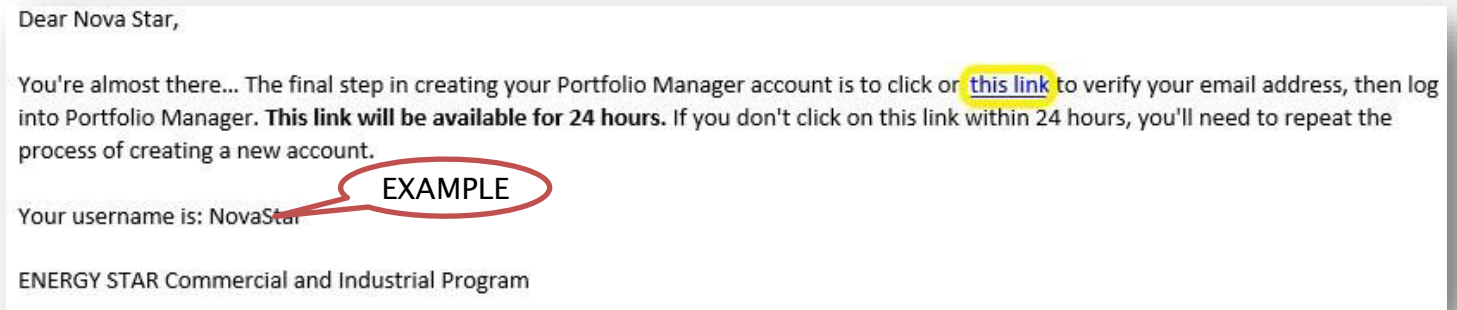
Yes

No

- c. Once all required information has been entered, select the 'Create My Account' button at the bottom of the screen.



3. After selecting 'Create My Account', an email will be automatically sent out as a verification. Please select the hyperlink from that email as shown below.



4. Once your email has been verified, please log into your account to view your portfolio.

Adding a Property to your Portfolio


1. Starting with the 'My Portfolio' tab, you will select 'Add a Property'.



2. On the 'Set up a property' page, please select the appropriate answers for each of the three questions. After your selections are made, select 'Get Started' at the bottom of the screen.

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 building. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. You 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?

Select a property type

[Learn more about Property types.](#)



Your Property's Buildings


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

None: My property is part of a building (e.g., a Tenant Space)

One: My property is a single building

More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?



Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.

Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.

Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

3. Enter the Basic Property Information as seen below. Any field that is marked with a * is a required field and must be completed.

About Your Property

Name: *

Country: *

Street Address: *

City/Municipality: *

County:

State/Province: *

Postal Code: *

Year Built: *

Gross Floor Area: * 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: * %

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.

- a. If you have been provided a Standard ID, please enter it. This can remain blank and entered at a later time if you do not currently have your ID available. Once you have completed the page, select 'Continue'.

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(s):

ID:

[+ Add Another](#)

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

Back

Continue
Cancel

4. Enter in your property details for 'How is it used?' After you have completed the requested information, please select 'Add Property'.

Building Use [Edit Name](#)

Office refers to buildings used to conduct commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area (GFA) should include all space within the building(s) including offices, conference rooms and auditoriums, break rooms, restrooms, kitchens, lobbies, fitness areas, basements, storage areas, stairways, and elevator shafts.

If you have restaurants, retail, or services (dry cleaners) within the Office, you should most likely include this square footage and energy in the Office Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

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

[More on this rule.](#)

| Property Use Detail | Value | Current As Of | Temporary Value |
|-----------------------------------|---|--|--------------------------|
| ★ Gross Floor Area | <input style="width: 100%;" type="text" value="50,000"/> Sq. Ft. ▼ | <input style="width: 80px;" type="text" value="1/1/1982"/> | <input type="checkbox"/> |
| ★ Weekly Operating Hours | <input style="width: 80px;" type="text" value="50"/> <input type="checkbox"/> Use a default | <input style="width: 80px;" type="text" value="1/1/1982"/> | <input type="checkbox"/> |
| ★ Number of Workers on Main Shift | <input style="width: 80px;" type="text" value="5"/> <input type="checkbox"/> Use a default | <input style="width: 80px;" type="text" value="1/1/1982"/> | <input type="checkbox"/> |
| ★ Number of Computers | <input style="width: 80px;" type="text" value="5"/> <input type="checkbox"/> Use a default | <input style="width: 80px;" type="text" value="1/1/1982"/> | <input type="checkbox"/> |
| Percent That Can Be Heated | 50 % or more ▼ <input type="checkbox"/> Use a default | <input style="width: 80px;" type="text" value="1/1/1982"/> | <input type="checkbox"/> |
| ★ Percent That Can Be Cooled | 50 % or more ▼ <input type="checkbox"/> Use a default | <input style="width: 80px;" type="text" value="1/1/1982"/> | <input type="checkbox"/> |

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

Back

Add Property
Cancel

- a. Once you have successfully created your property, you will see the confirmation notice as shown below.

Congratulations! You have successfully created your property.

Next, you can:

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

Adding a Meter to the Property

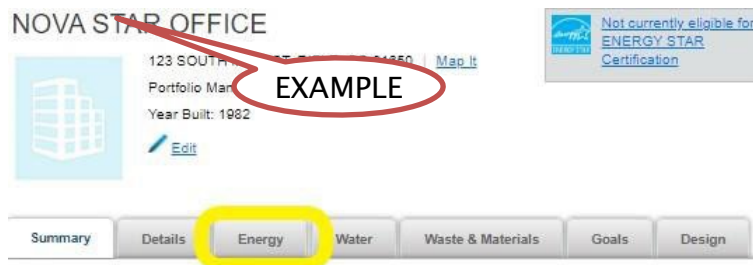
Important Note: If your property has multiple SIEA active meters/accounts, you will only be adding one Energy Star Portfolio Manager meter to that property.

Columbia REA will add in all active meters to your portfolio to provide the aggregated energy total to you. Any questions regarding this, please contact our office.

1. The next step is to add a meter to the property in Portfolio Manager. Click on the 'My Portfolio' tab to review your property list. Select the property address hyperlink as shown below.



- a. Then select the 'Energy' tab.



- b. Select the 'Add a Meter' button.

Meters - Used to Compute Metrics (0)

[View as a Diagram](#)

[Add A Meter](#)

- c. Next you will need to select your property's energy source. To receive Columbia REA's electric data, please ensure that you select 'Electric' from the 'Sources of Your'

Property's Energy' menu. This will then present more detailed options to be selected for where your energy comes from. Since the information for the property will be aggregated, you will only select 'purchased from the grid' and enter in '1' for the number of meters. Then select the 'Get Started' button.

Sources of Your Property's Energy

What kind of energy do you want to track? Please select all that apply.

- Electric
 - purchased from the grid
 - How Many Meters?
 - generated from onsite solar panels
 - generated from onsite wind turbines
 - Natural Gas
 - Propane
 - Fuel Oil (No. 2)
 - Diesel
 - District Steam
 - District Hot Water
 - District Chilled Water
 - Fuel Oil (No. 4)
 - Fuel Oil (No. 5 and No. 6)
 - Coal (anthracite)
 - Coal (bituminous)
 - Coke
 - Wood
 - Kerosene
 - Fuel Oil (No. 1)
 - Other:

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

2. After you have selected 'Get Started', you will see the box shown below. You will be required to select the 'Units' (kWh) and enter in the date the meter/service was activated. Although not required, you can use the 'Custom Meter ID' field for a description of the service(s) if you would like. Once you have entered the required information, please select 'Create Meters'.

About Your Meters for Eagle Office

Enter the information below about your new meters. The meter's **Units** and **Date Meter became Active** are required. You can also change the meter's name.

1 Energy Meter for Eagle Office (click table to edit)

| <input type="checkbox"/> | Meter Name | Type | Other Type | Units | Date Meter became Active | In Use? | Date Meter became Inactive | Enter as Delivery? | Custom Met ID 1 Name |
|-------------------------------------|---------------------|-----------------|------------|---------------------------|--------------------------|-------------------------------------|----------------------------|--------------------------|----------------------|
| <input checked="" type="checkbox"/> | Electric Grid Meter | Electric - Grid | | kWh (thousand Watt-hours) | | <input checked="" type="checkbox"/> | | <input type="checkbox"/> | |

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a. After you have created the meter, a green box will appear at the top of the page as a confirmation.

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later.

Add Columbia REA as a Contact

1. Now that you have successfully created your property and meter, you will need to add SIEA as a contact.
 - a. First, you will need to select 'Contacts' on the top right of the page.



b. On the contact screen you will select 'Add New Contacts/Connections'.

My Contacts and Organizations

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.

Contacts
Organizations

| <input type="checkbox"/> | Name (title) | Organization | Connection Status | Username |
|--------------------------|--------------|--------------|-------------------|----------|
| 1 - 0 of 0 | | | | |

2. On the next page you will use the 'Connect with an Existing User for Sharing' box. Please enter in Columbia REA in the 'Name' field and then select 'Search'.

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 Port Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact has a 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:

Organization:

Email:

- a. Columbia REA will appear as a search result on the right side of the screen for you to select to connect with. Please select the 'Connect' button.

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 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:

| | |
|---|--|
| Laura Getts (lauragetts) Business Development Manager with San Isabel Electric Association | <input type="button" value="Connect"/> |
| Paris Elliott (SantisabelElec) Communications Manager with San Isabel Electric | <input type="button" value="Connect"/> |
| <input type="text" value="Columbia REA"/> | <input type="button" value="Connect"/> |

Page 1 of 1

3. To complete the contact set up, you will need to review the Terms of Use, select the agreement box, and then select 'Send Connection Request'.

ENERGY STAR® PortfolioManager®

Welcome lauratest: [Account](#) | [Notifications](#) | [ENERGY STAR Notifications](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

Send a Connection Request to [San Isabel Electric Association Member Services](#) to Begin Exchanging Data

[San Isabel Electric Association Member Services](#) 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 [San Isabel Electric Association Member Services](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

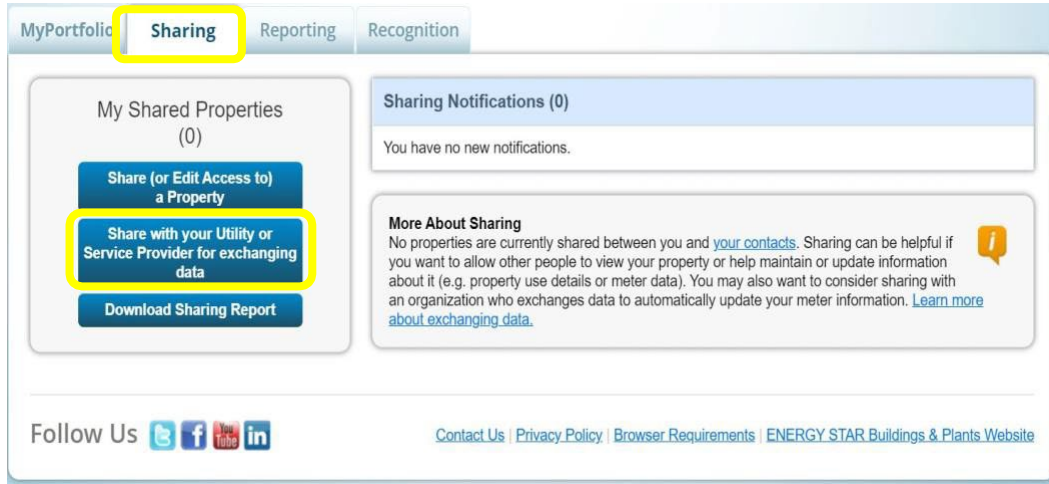
Terms of Use: None Provided

Agreement: I agree to my provider's ([San Isabel Electric Association Member Services](#)) Terms of Use.

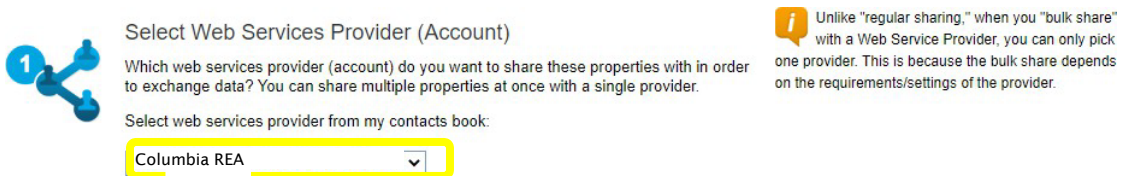
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Sharing and Exchanging Data with Columbia REA

1. The final step you will need to do is authorize the sharing/exchanging of your energy data. From your portfolio's home screen, you will select the 'Sharing' tab as shown below. You will then select the middle option, 'Share with your utility or service provider for exchanging data'.



- a. On the next page, you will select Columbia REA as the 'Web Services Provider'.



- b. In the next section, you will need to 'Select Properties'. Use that link to open your list of properties you have already entered on the site. If you have entered more than one property, you can select to share them all instead of having to share them individually. Once you have selected the properties you want to share, you will select the 'Apply Selection' link at the bottom of the box.



| <input type="checkbox"/> | Name | Property Type | State/Province |
|-------------------------------------|--|---------------|----------------|
| <input checked="" type="checkbox"/> | Peaks to Candle Susan Kalman Activity Center | Office | CO |

EXAMPLE

Filter Properties (1)

Filter by Property Type

Office (1)

Filter by Construction Status

Existing (1)

Filter by State/Province

Colorado (1)

Filter by Shared from

None - My Properties (PDA) (1)

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

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

- c. Finally, you will need to ‘Choose Permissions’. For Columbia REA to provide the energy usage information you are required to furnish to the state, you will need to select ‘Bulk Sharing’ and then ‘Exchange Data Full Access’. When you have made these selections, please complete the request by clicking the ‘Authorize Exchange’ button.

Choose Permissions

If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.
 - Exchange Data Full Access (with full access to all properties and meters)
 - Exchange Data Read Only Access (with read only access to all properties and meters)
 - Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)
 - Remove Access (i.e. remove existing access to all properties)
- Personalized Sharing ("Custom Orders")** - I want to give different permissions for each property and/or meter.

[Authorize Exchange](#) [Cancel](#)

2. You will receive a confirmation notification, as seen below, when you have successfully established the sharing and exchanging of energy data with Columbia REA.

Bulk Share Properties for Exchanging Data: Results

Choose Permissions → Set Up Connections → Check Existing Permissions → View Results/ Confirmation

✓ **Congratulations! You have successfully shared/edited access to your property(ies).**

A total of 1 share requests were sent.

If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

[Close](#)