



ENERGY AND WATER BENCHMARKING GUIDE

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City of Kansas City Missouri

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Introduction

This guide is intended to be a walk through using Portfolio Manager. The data is based on similar data used for Kansas City Missouri's City Hall building. The data is available if you want to work along with this guide. This document is intended to be a great introductory tool for individuals interested in energy benchmarking or needing guidance to fulfill the requirements for the Energy Empowerment Ordinance.

This document uses cross-referencing. The easiest way to find a specific topic is to go to the **Table of Contents** and on your keyboard, hold **Control** while you **Click** on the section (if you are reading this in a PDF file then you only need to click it). You can also find the cross-reference to the table of contents itself in the footer of each page.

You can follow along with any example given using the [City Hall Data Sheet](#). Links will be provided throughout the document but can easily be found in the footer of each page.

Contact Information

The City of Kansas City's Benchmarking Help Center provides this document and all associated resources. Should you have any questions about Energy Benchmarking in general or about complying with the Energy Empowerment Ordinance, please reach out. The contact information is listed below.

Website: www.kcmo.gov/kcgreen/benchmarking

Mailing Address: 414 E 12th St
Kansas City, Missouri 64106

Email: Benchmarking@kcmo.org

Phone: 816-513-3462

Supplemental Resources

Along with this document there is a [City Hall Data Sheet](#) that will help you to follow along if you want to enter in sample information based on City Hall data.

In addition, there are multiple resources available on our website. Some of these **resources** are:

[Portfolio Manager Guide 1- Creating an Account and Property](#)

[Portfolio Manager Guide 2- Adding Meters and Usage Data](#)

[Portfolio Manager Guide 3- Data Quality Checker](#)

[Benchmarking Submittal Steps](#)

[Portfolio Manager Help](#)

Setting Up a Portfolio Manager Account

The first step will be to go to the [Energy Star Portfolio Manager Website](#) and click **Create Account** (feel free to skip this step if you already have an account.)

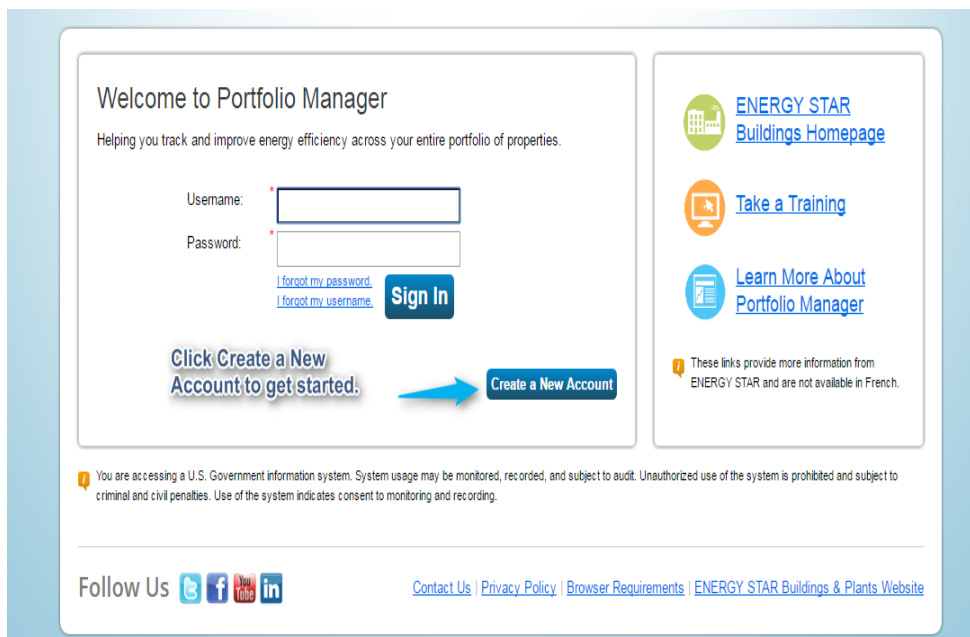


Figure 1

On the next page fill out the information. Under the reporting units section, you will want to put **Conventional EPA Units**. Once all necessary information is put into the system, click **Create My Account**.

Already have an account? [Sign In Here](#)

Create an Account

Accessing Your Account

Username:

Password:
Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, @, %, etc.).

Confirm Password:

Getting Started

Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.

About Yourself

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:

Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization 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

Fill out the boxes and click CREATE MY ACCOUNT

About Your Organization

Organization Name:

Primary Business or Service of Your Organization:

Is your organization an ENERGY STAR Partner? Yes No

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.

Searchability in Portfolio Manager

Can other people search for you and send you a connection request? Yes No

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.

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

Figure 2

You will need to validate the account by clicking on a **link sent to the email** you provided. Each time you use the [Energy Star Portfolio Manager Website](#) link, you should be able to log in with the username and password you created. The City of Kansas City will use a demo account throughout this document.

Adding a Building

The main page once you log in is below. This will be the starting point for each section in the demonstration.



Figure 3

As you may notice, my properties are listed on the right. If there are none, that area will be blank. To create a property, click the **Add a Property** button at the

top left corner. The first time you enter a property it may instead say **Enter my First Property**.

If you are following along with the City Hall Data, on the first page you will want to enter in the

Property Type as Office;

Your Properties Buildings as 1;

Your properties Construction Status as Test Property;

Then click **Get Started**.

ENERGY STAR® PortfolioManager®

Welcome jbflelds: [Account Settings](#) | [Notifications](#) | [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?

[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
 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.

I would like to enter data as if this property is in operation.
 I would like to enter data as if this property is in the design phase.

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

Get Started! [Cancel](#)

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[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

Figure 4

On the next page you will want to fill out the information as follows

Name: City Hall.

Country: United States.

Address: 414 E 12th St.

City/Municipality: Kansas City.

State/Province: Missouri.

Postal Code: 64106.

Year Built: 1937.

Gross Floor Area: 413,901.

Irrigated Area: 0.

Occupancy: 100%.

In the area where it says do these apply, none of these will need to be marked for this demo building. however, depending on your actual building you may need to mark the boxes when benchmarking your own building.

Once all the information is entered, click **Continue**.

Figure 5

On the next page, the Gross Floor area should be filled in already. Enter in the following information.

- Weekly Operating Hours:** 65.
- # of Workers on Main Shift:** 951.
- Number of Computers:** 807.
- % That Can be heated:** ≥50%.
- % That can be Cooled:** ≥50%.

We are leaving the **Current as of Date** to be 1/1/1937.

Once the information is put into the system click **Add Property**.

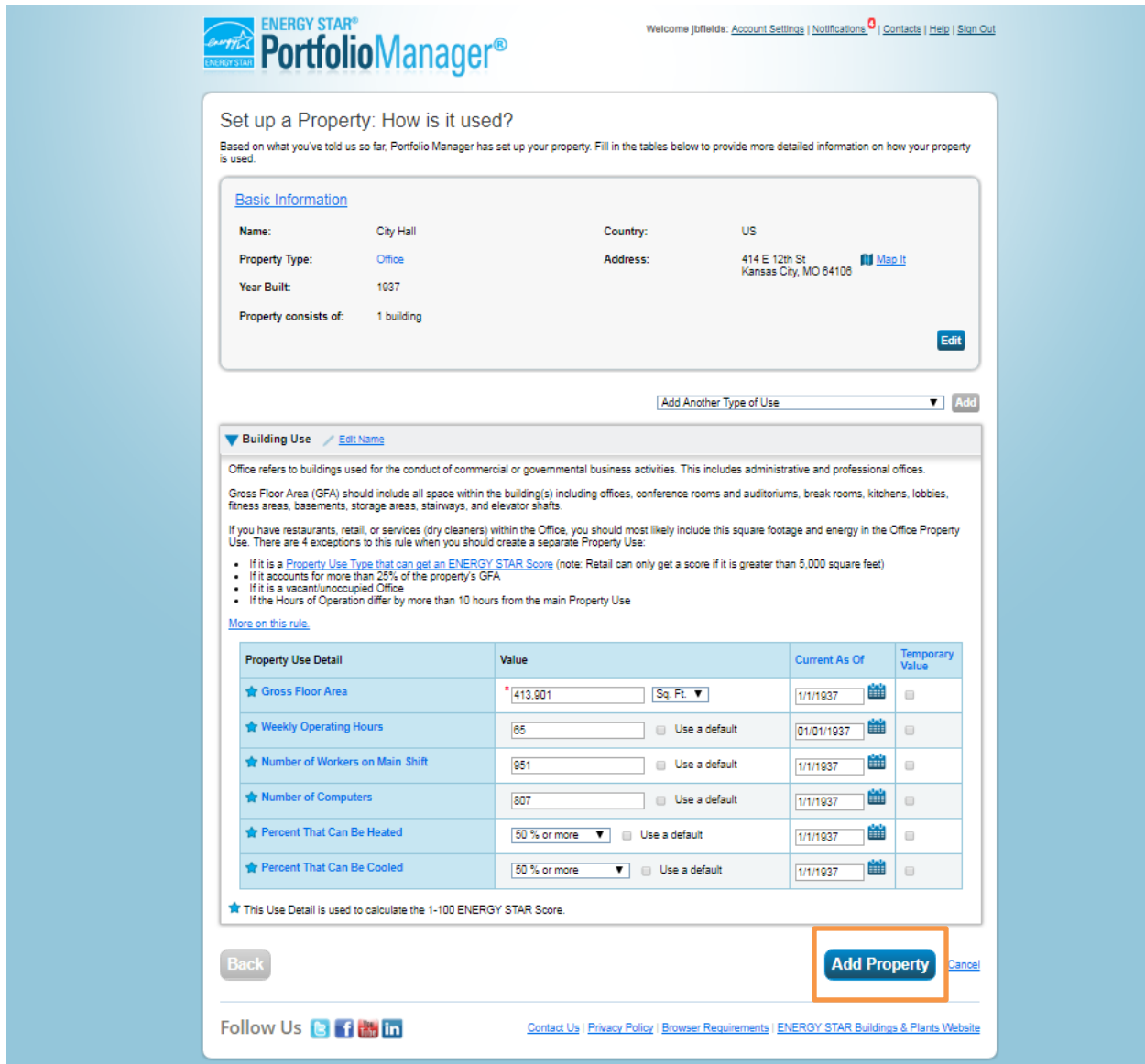


Figure 6

*****Metrics with a star next to them indicate that this is part of the calculation for the Energy Star Score*****

You have now added the property. The next page takes you to the building profile. On any page, you can return to the main page by clicking at the top as shown by the arrow on the image below.

Welcome | [Profile](#) | [Account Settings](#) | [Notifications](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

ENERGY STAR Portfolio Manager

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.

City Hall
 414 E 12th St, Kansas City, MO 64108 | [Map It](#)
 Portfolio Manager Property ID: 6079346
 Year Built: 1937
[Edit](#)

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](#)

Property Profile [\(Future enhancements\)](#)
 This section will be deleted in 2018, except for the property photos which will remain. [More information.](#)
[+ Create Profile](#)

Source EUI Trend (kBtu/ft²)

Total GHG Emissions Trend (Metric Tons CO₂e)

Metrics Summary [Change Metrics](#) [Change Time Periods](#)

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kg CO ₂ e/ft ²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kg/ft ²)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Check for Possible Data Errors
 Run a check for any 12-month time period to see if there are any possible errors found with your data.
[Check for Possible Errors](#)

Sharing this Property
[Share](#)

More About Sharing
 You haven't [shared your property](#) yet. Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)

Figure 7

Adding an Energy Meter(s)

We will start from the home page. Here you should see that the property created is now on the right-hand side of the screen. We will need to go into the building profile which we can do by clicking on the name. Please click on the name of the building you chose to continue.

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top, the logo and navigation links are visible. The main content area is divided into several sections:

- Properties (16):** A box with an "Add a Property" button.
- Source EUI Trend (kBtu/ft²):** A line graph showing energy consumption trends from 2006 to 2016.
- Manage Portfolio:** A section with two main actions:
 - Transfer ownership:** A link to transfer ownership of a property to another user.
 - Upload and/or update multiple properties:** A link to upload an Excel spreadsheet to create or update multiple properties.
- Dashboard:** A central area with a search bar, a dropdown menu set to "View All Properties (16)", and a "Refresh Metrics" button. Below this is a table of properties:

Name	ID
City Hall	6079346
Copy of Test1: Jesse's Demo	5804371
akak	5848787
Office	5976289
Office2	5848776
Parking	5895361
RM Test	5910009

Figure 8

We are back at the beginning of the page we created last section. To add an energy meter, first we will need to click on the **Energy Tab**.

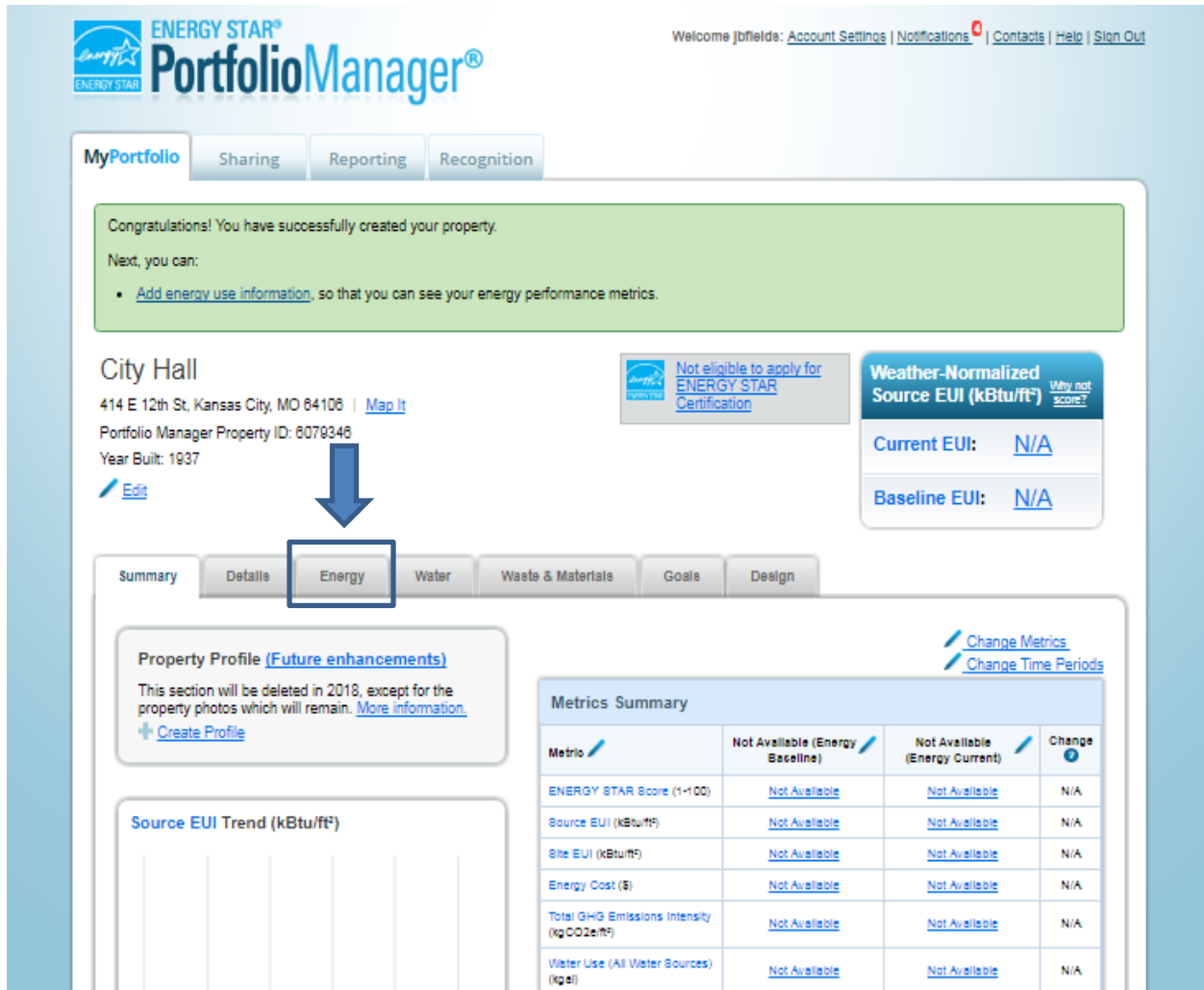


Figure 9

From here we will want to click on **Add a Meter** which can be found in two locations on this page.

MyPortfolio | Sharing | Reporting | Recognition

City Hall
 414 E 12th St, Kansas City, MO 64108 | [Map It](#)
 Portfolio Manager Property ID: 6079346
 Year Built: 1937
[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

Meter Summary
 0 Energy Meters Total
 In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.
[Add A Meter](#)
 Current Energy Date
 Not Available
[Enter Your Bills](#)

Meters - Used to Compute Metrics (0)
[View as a Diagram](#)

Add A Meter

! There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. [Enter information about your energy meters](#) to begin tracking energy usage. After entering the meter, you will need to [choose to include it in your metrics](#).
 For a step-by-step guide to entering meter data, see [How to get Utility Data into Portfolio Manager](#).

Figure 10

For City Hall, we have three meters:

- Electricity- Purchased From the Grid,
- District Chilled Water- From an Electric-Driven Chiller,
- District Steam.

When entering in your own building it is important to find out which types of meters you are using. Typically, KCPL will be Electricity- grid while MGE will be Natural Gas. Below are the three for City hall. Once you have these marked, click **Get Started!**

Get Started Setting Up Meters for City Hall

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters | spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of yc finally, you can hire an organization that exchanges data to update your energy data automatically.

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 onsite with my own solar panels
 - generated onsite with my own wind turbines
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
How Many Meters?
- District Hot Water
- District Chilled Water
 - from an electric-driven chiller
How Many Meters?
 - from an absorption chiller using natural gas
 - from an engine-driven chiller using natural gas
 - from another kind of chiller
- 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](#)

Figure 11

The next page you will check all the meter boxes on the left-hand side and enter in the correct units and active dates. We are going to put the active date as **the first billing date found on each meter** (The data sheet will have the active date for each meter listed on the top).

*****Please note the meter active date should be on or before the billing date of any information you add for that meter. The active date should also not be before the building date.*****

The units for a meter should be found on the bill in which the usage is shown. If not, it can be obtained by the utility company. Below are the units for each meter in the demo building.

District Steam- MBtu.

District Chilled Water- Ton Hours.

Electric Grid- kWh.

Please enter in the information accordingly and click **Create Meters**.

About Your Meters for City Hall

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.

3 Energy Meters for City Hall (click table to edit)

<input checked="" type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
<input checked="" type="checkbox"/>	District Steam	District Steam		MBtu (million Btu)	12/31/15	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	12/18/15	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	District Chilled Water - Electric Meter	District Chilled Water - Electric		ton hours	12/30/15	<input checked="" type="checkbox"/>		<input type="checkbox"/>

[X Delete Selected Entries](#)
[+ Add Another Entry](#)

[Back](#) [Create Meters](#) [Cancel](#)

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Figure 12

On the next page, You can click on the grey area on each meter to add the billing information.

*****Please note that the entire calendar year will need to be put in January 1st-December 31st. For example, for the 2017 compliance deadline, I will have needed to put in information from January 1st, 2016 to December 31st, 2016. Each day will need to be accounted for so if this is the first-time benchmarking, you will need 13 billing cycles to make sure no days are cut off. All the energy meters in this demo use 13 cycles for this reason. *****

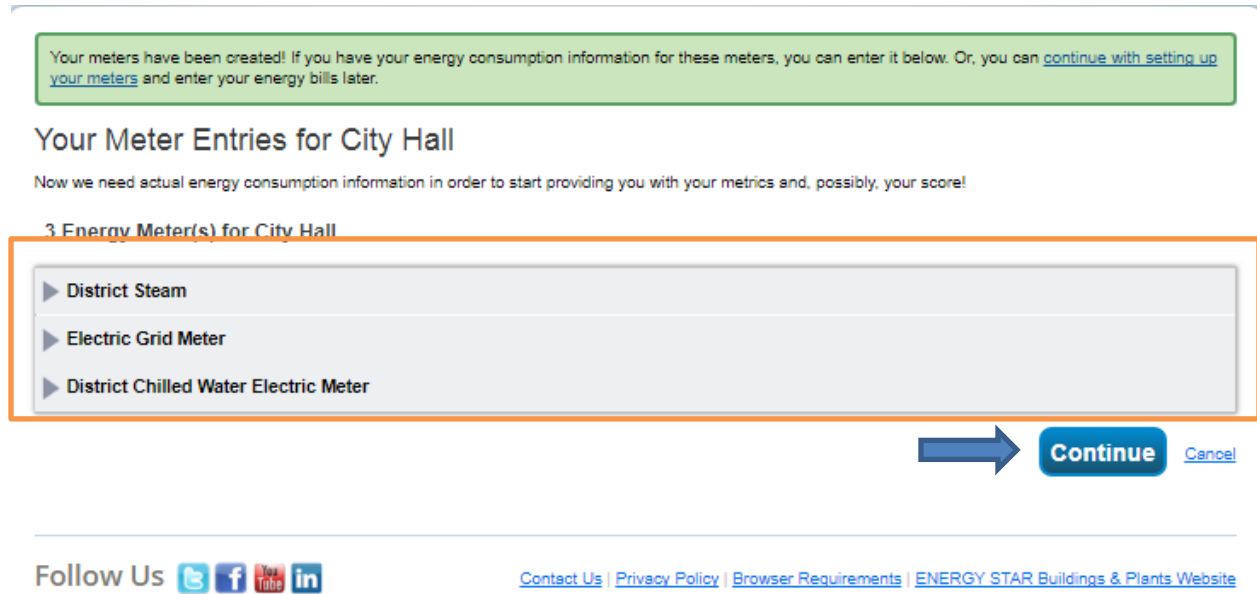


Figure 13

Please add in the information from the data sheet into the proper location on this page. Once all information is entered, click **Continue**.

On the next page, make sure all meters are selected and click on the circle indicating the meters account for the entire energy consumption. Then, click **Apply Selections**.

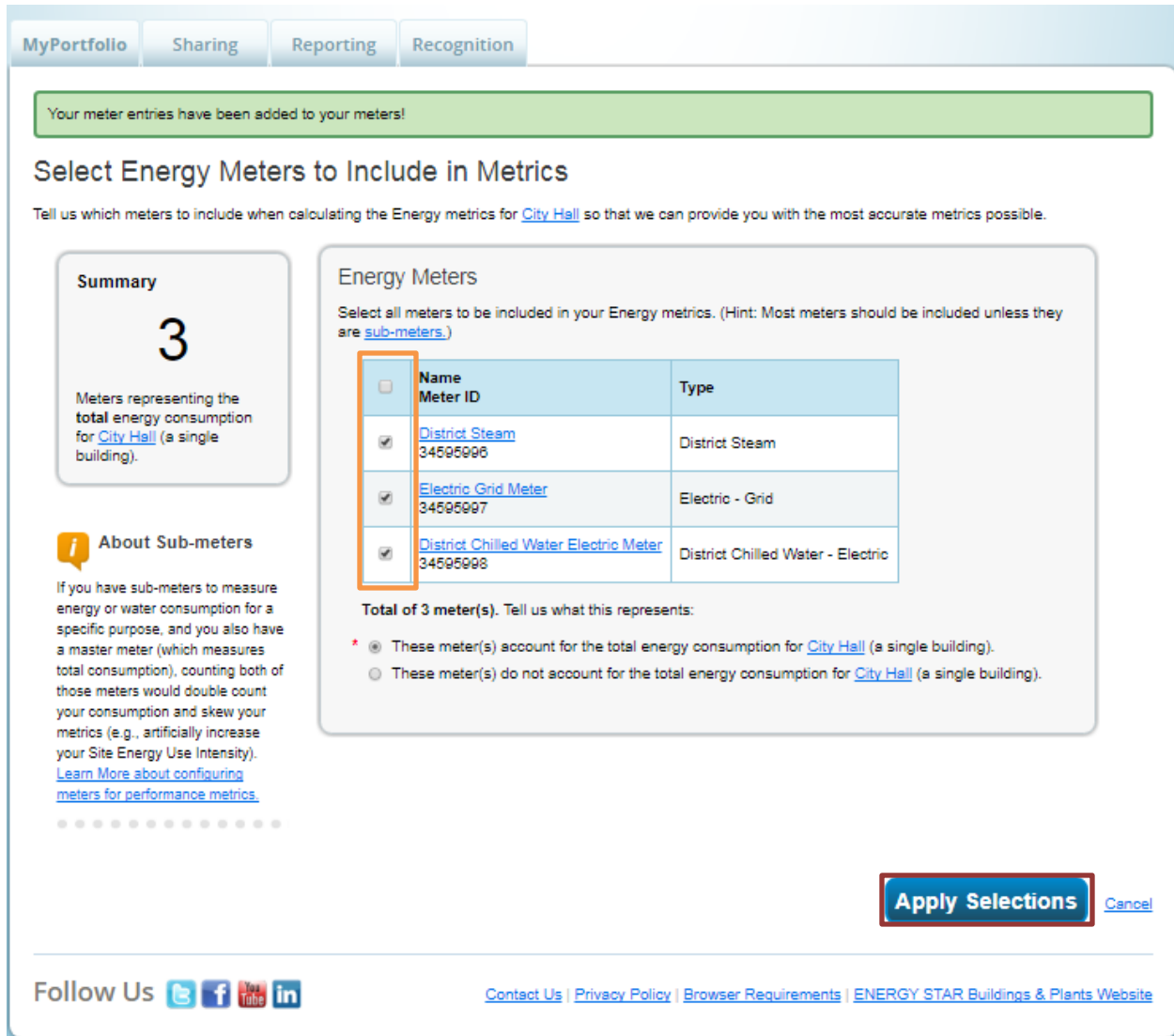


Figure 14

You have now entered in the Energy meters and should be redirected to the Energy tab in the building profile.

Adding a Water Meter(s)

The steps here are very similar to the section regarding energy meters. This demo will start from the home page. You should see the building you created on the right-hand side. Please click on the building.

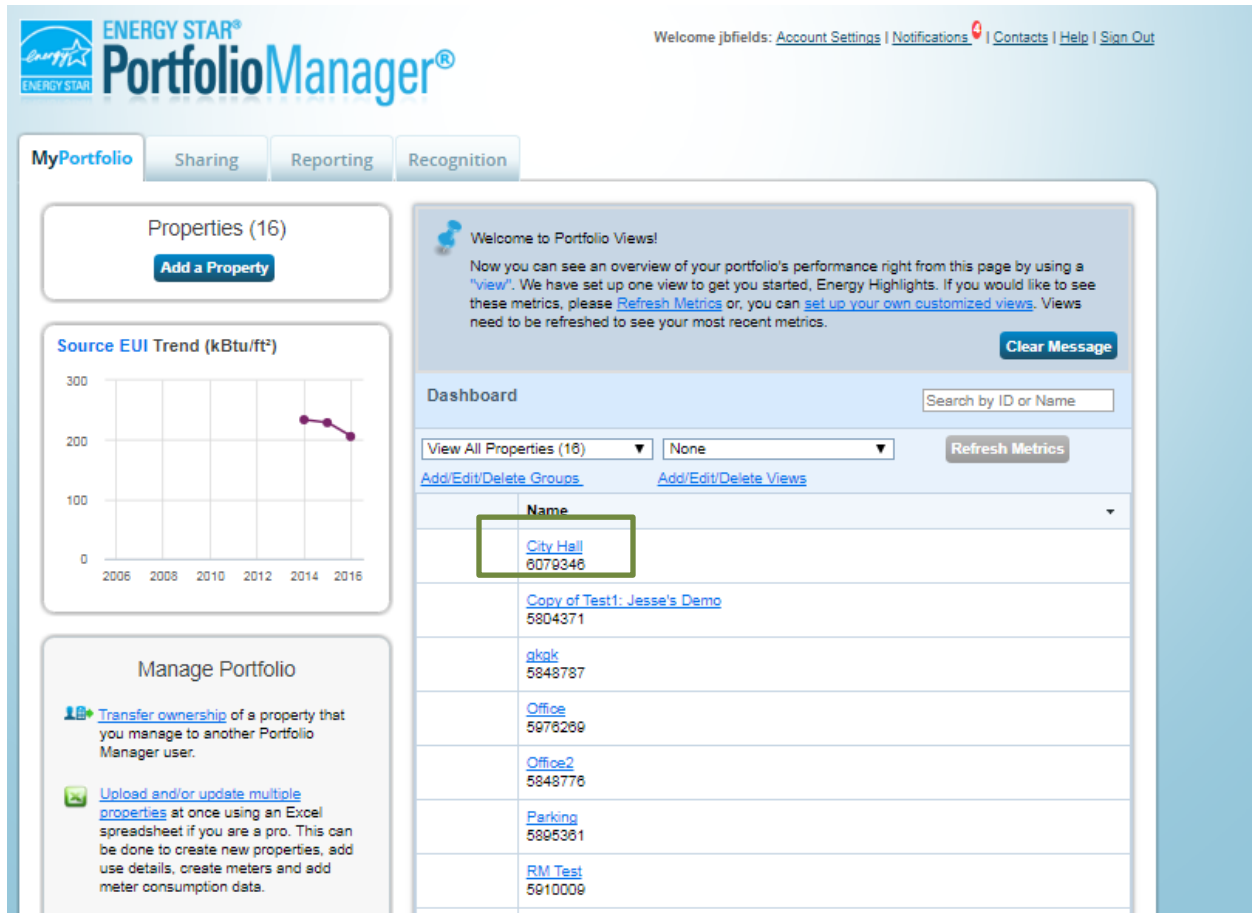


Figure 15

Next click on the **Water Tab**.

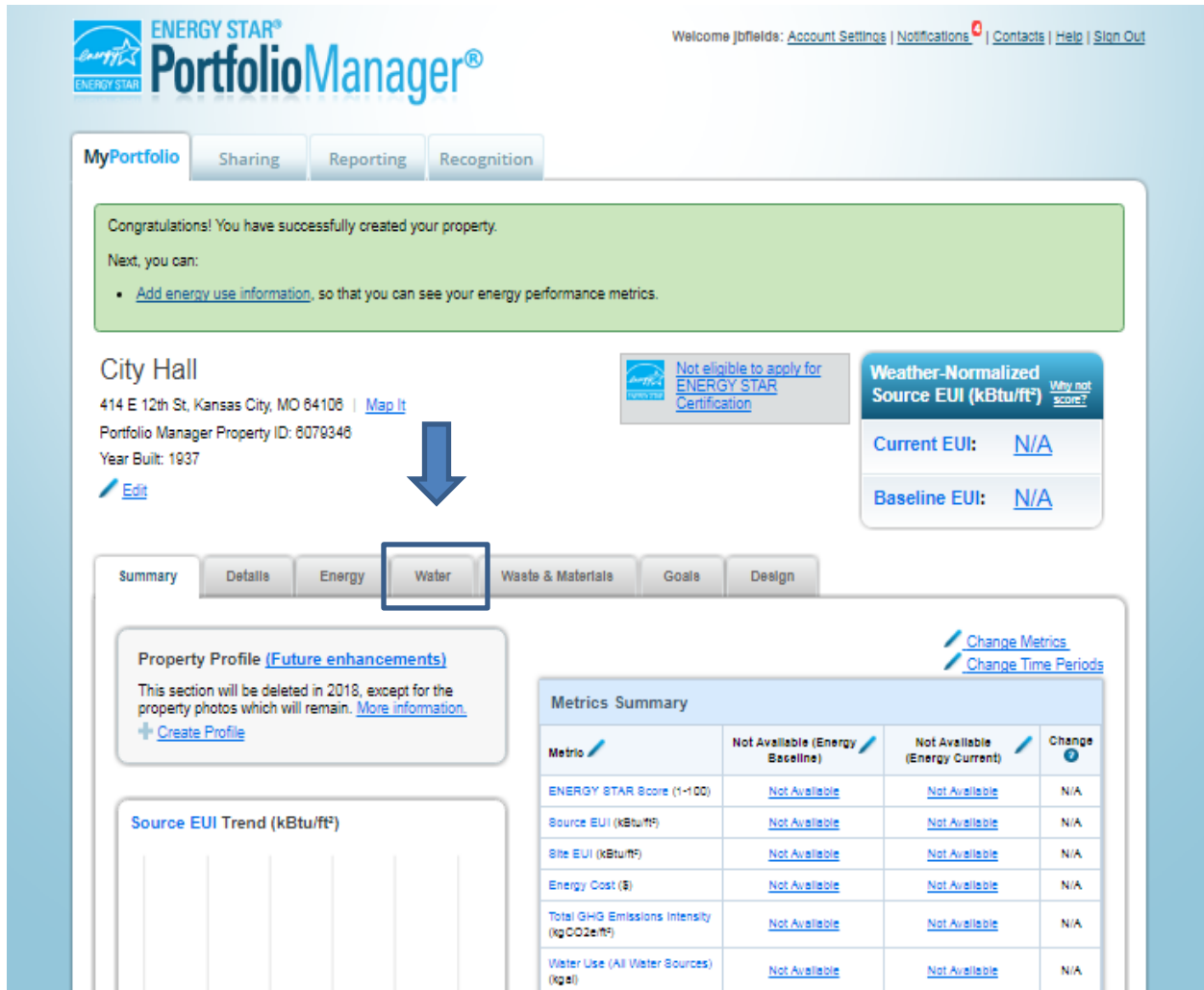


Figure 16

On this page you will want to click on **Add a Meter**. This can be found in two locations on this page.

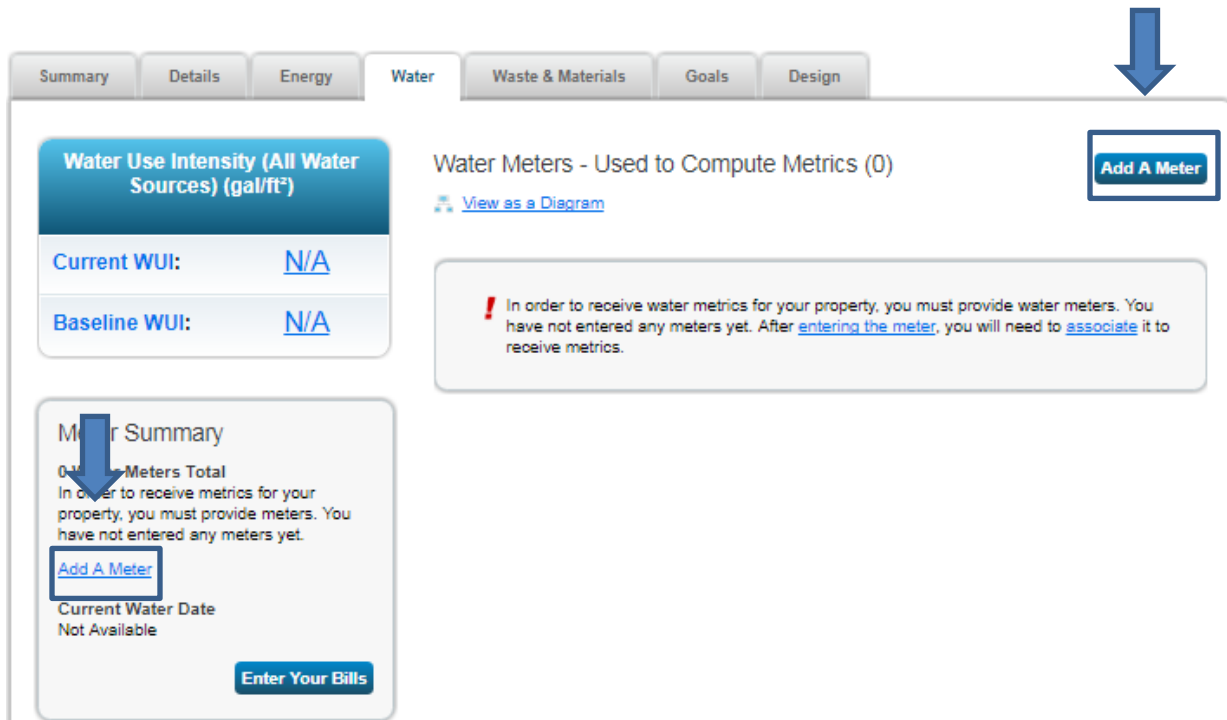


Figure 17

On this page, you will be asked to select the meter(s). For this demo there is only one, **Potable Water Mixed Use**. Please select that and hit **Get Started**.

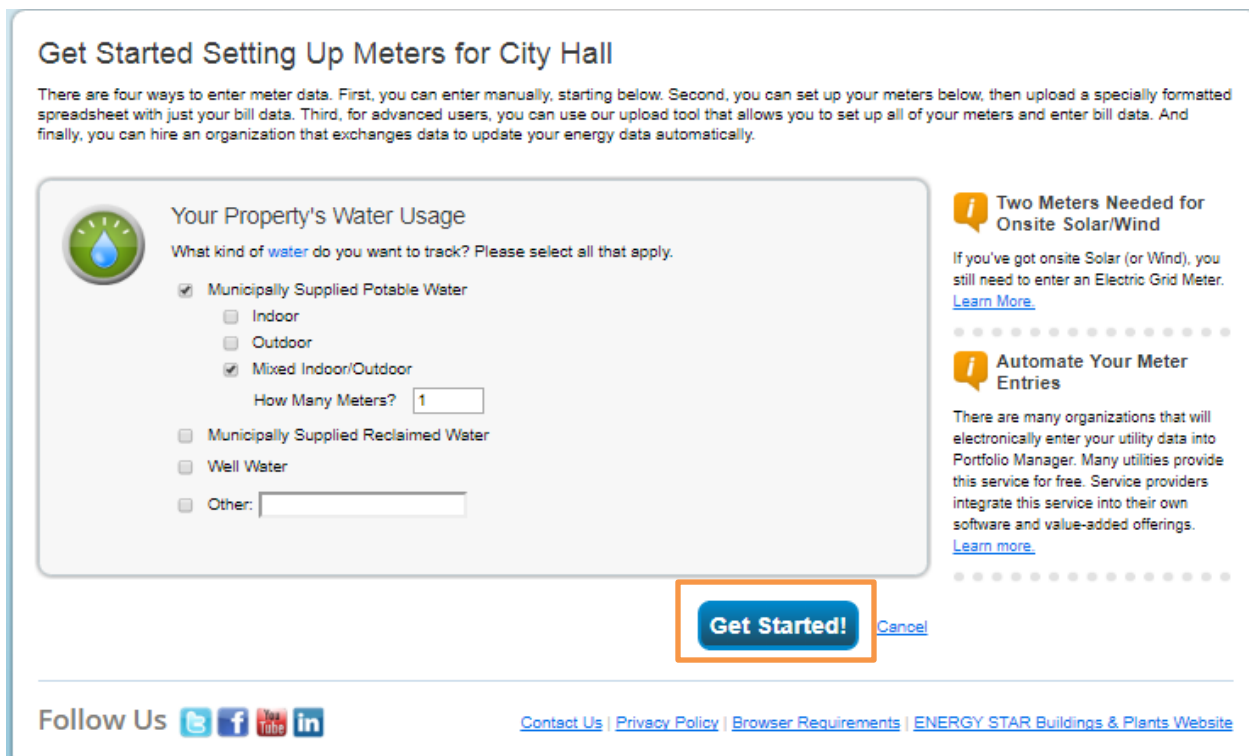


Figure 18

On this next page, select the **box** next to the meter and put in the **units (gallons)** and the **date the meter became active (the date of the first billing start date)**. Then click **Create Meters**.

About Your Meters for City Hall

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 Water Meter for City Hall (click table to edit)

<input checked="" type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive
<input checked="" type="checkbox"/>	Potable: Mixed Indoor/Outdoor Meter	Potable: Mixed Indoor/Outdoor		Gallons	1/1/16	<input checked="" type="checkbox"/>	

[X Delete Selected Entries](#)
[+ Add Another Entry](#)

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Figure 19

On the next page, you can click on **Click to add an entry** on the meter to add the billing information.

*****Please note that the entire calendar year will need to be put in January 1st-December 31st. For example, for the 2017 compliance deadline, I will have needed to put in information from January 1st, 2016 to December 31st, 2016. Each day will need to be accounted for so if this is the first-time benchmarking, you will need 13 billing cycles to make sure no days are cut off. In this example, we are only using 12 because the meter start date is on the 1st of January, so all the days will be accounted for with only 12 entries. *****

Add in all the **usage entries** on the data sheet and click **continue**.

Your Meter Entries for City Hall

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

1 Water Meter(s) for City Hall

▼ Potable: Mixed Indoor/Outdoor Meter

	Start Date	End Date	Usage Gallons	Total Cost (\$)	Estimation
Click to add an entry					

✖ [Delete Selected Entries](#)

+ [Add Another Entry](#)

📄 [Learn how to copy/paste](#)

Upload data in bulk for this meter:

? You can copy/paste into the table above [\(instructions in this FAQ\)](#), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

[Cancel](#)

Figure 20

Make sure the **meter is selected** and then click the **box that states the meter accounts for the entire consumption**. Now click **Apply Selections**.

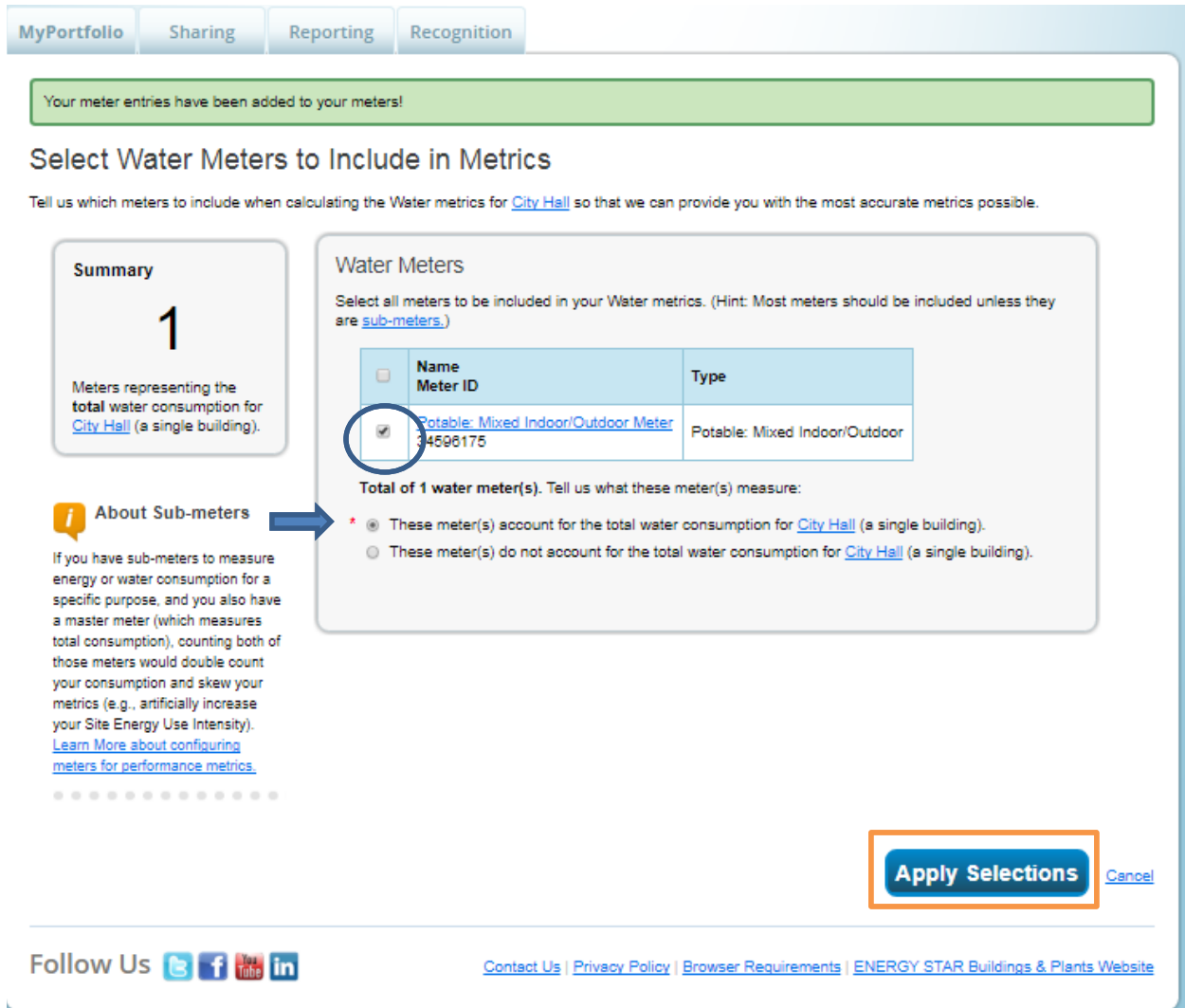


Figure 21

Using the Error Checker

By this point you should see a number at the top-right that either shows an Energy Star Score or Energy Use Intensity (EUI). In this demo it will be an Energy Star Score. If you click on the water tab, then you should see a water use intensity amount on the left side. If a number doesn't appear in either area, this usually shows there is an error. We will go over how to check for errors in this section

Start from the **home page**, click on the **property you created**. It will take you to the **Summary Tab** for the building which is where we want to be.

Click on the **Check for Possible Errors** box on the middle-right.

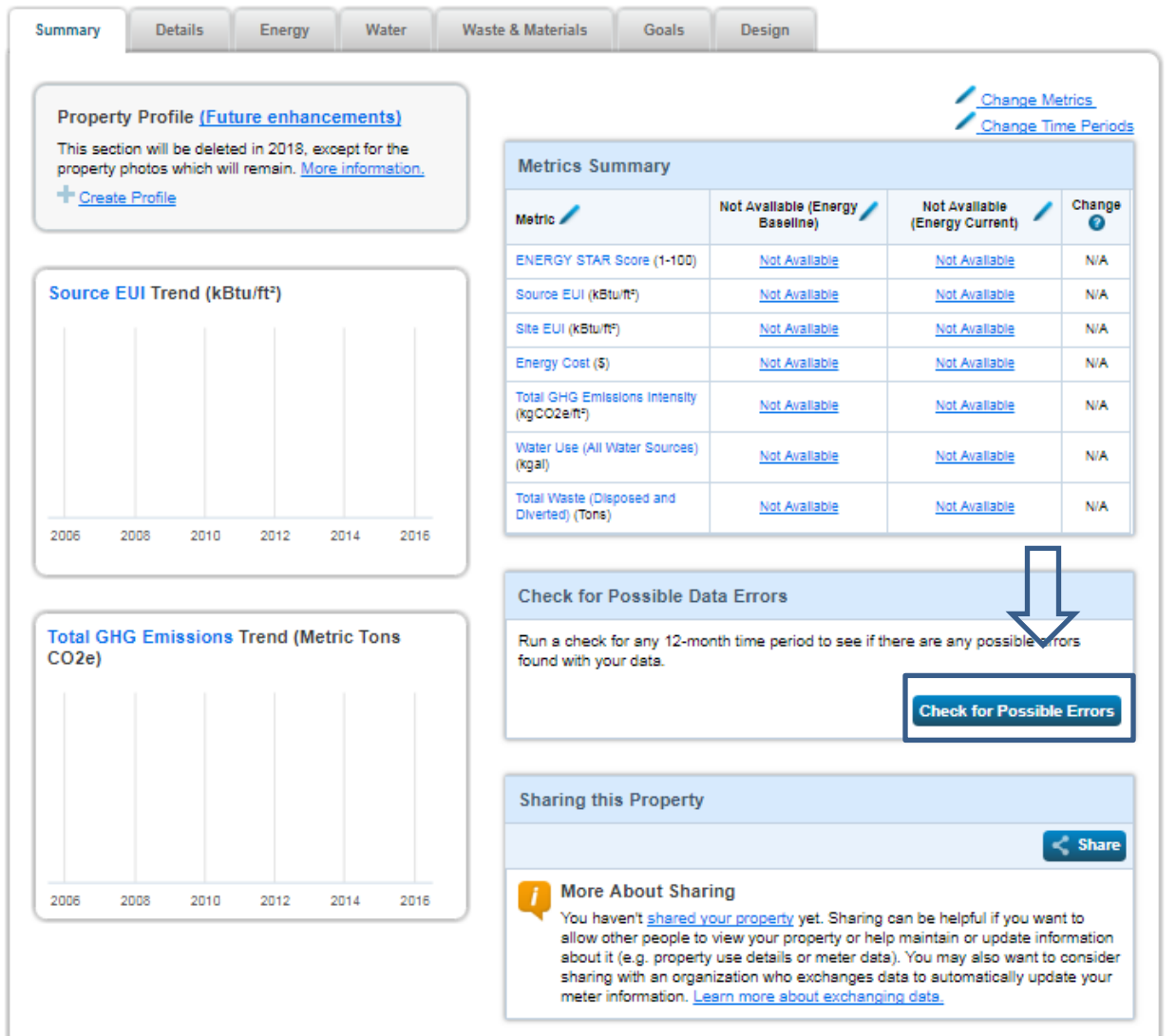


Figure 22

Since we are entering in 2016 data, will put **year ending Dec. 31, 2016**. Then click on **Run Checker**.



Figure 23

This next page will tell you of any errors. **One error occurs about waste management.** The Energy Empowerment Ordinance **does not require** a waste management submittal therefore this error is fine (waste management will not be covered in this document).

Other errors will need to be addressed. Otherwise, the data will not be useable for benchmarking plus the City of Kansas City will receive indicators of errors (for those subject to submitting for the Energy Empowerment Ordinance).

Later in the document, we will go over common errors. This will require us to revisit this tool later.

Editing Information

Starting from the home tab, click on the building you wish to edit.

Now you will want to go into the **Details tab** at the top. In this tab you can edit your building information.

To edit basic information, click the Edit button at the bottom of the box in the top left corner.

MyPortfolio | Sharing | Reporting | Recognition

City Hall
 414 E. 12th Street , Kansas City, MO 64106 | [Map It](#)
 Portfolio Manager Property ID: 2874429
 Year Built: 1937
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

ENERGY STAR Score (1-100)
 Current Score: 96
 Baseline Score: 85

Summary | **Details** | Energy | Water | Waste & Materials | Goals | Design

Basic Information

Construction Status:
Existing property that is one single building

Property GFA - Self-Reported:
413,901 Sq. Ft.

Occupancy:
100% [Edit](#)

Property Uses and Use Details

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

Name	Property Use Type	Gross Floor Area	Action
▶ Office Use	Office	413,901 ft²	I want to...
Property GFA (Buildings):		413,901 (used to calculate EUI)	
Property GFA (Parking):		0	

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:
2874429

Custom IDs: None

Standard IDs: 1 [view](#)

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 GFA by Use

Office: 100 %

Property Type

Property Type - Self-Selected:
Office [Edit](#)

Property Type - EPA Calculated:
Office

The EPA-Calculated Property Type is used for your metrics. [Learn more about property types.](#)

Figure 24

To edit information regarding the use type, click the action drop down and click on **Correct Mistakes**. This will allow you to make any corrections.

MyPortfolio | Sharing | Reporting | Recognition

City Hall
 414 E. 12th Street, Kansas City, MO 64108 | [Map It](#)
 Portfolio Manager Property ID: 2874429
 Year Built: 1937
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

ENERGY STAR Score (1-100)
 Current Score: 96
 Baseline Score: 85

Summary | **Details** | Energy | Water | Waste & Materials | Goals | Design

Basic Information
Construction Status:
 Existing property that is one single building
Property GFA - Self-Reported:
 413,901 Sq. Ft.
Occupancy:
 100% [Edit](#)

Unique Identifiers (IDs)
Portfolio Manager ID:
 2874429
Custom IDs: None
Standard IDs: 1 [view](#)
 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 Uses and Use Details
[View as Diagram](#) | Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Office Use	Office	413,901 ft ²	I want to... I want to... Update with New Information View Update History Correct Mistakes
Property GFA (Buildings):		413,901 (used)	
Property GFA (Parking):		0	

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Property GFA by Use
 Office: 100%

Property Type
 Property Type - Self-Selected:
 Office [Edit](#)
 Property Type - EPA Calculated:
 Office
 The EPA-Calculated Property Type is used for your metrics. [Learn more about property types.](#)

Figure 25

*****Please note that the Property GFA- Self-Reported should equal the SQFT of all of the use types with the exception of parking (if applicable). We only have one use type and the Gross Floor area of 413,901 matches the Property GFA- Self-Reported. Additionally, this tab is used to add or delete use types.*****

All the information in this demo should be correct up until this point but if there was an error in the property details please edit the information.

MyPortfolio
Sharing
Reporting
Recognition

Edit City Hall

Address Information

Name:

Country:

Street Address:

City/Municipality:

County:

State/Province:

Postal Code:

Property Details

What is the primary function of your property?

Property Type - EPA Calculated: **Office**
Portfolio Manager considers your property to be this type based on the uses you have entered. If this type doesn't look correct to you, please [edit your use information](#).

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?

Construction Status: Existing
 Design
 Test

Year Built:

Gross Floor Area:

Gross Floor Area (GFA) is the total property floor area, measured from the outside surface of the exterior walls of the building(s). Do not include parking. [Details on what to include.](#)

Inigated Area:

Occupancy: %

Additional Information

Is this property's data maintained by a Service and Product Provider? No Yes

Is this a Federal Property (owned by any country?) No Yes

Property Type Classification

The "Property Type - EPA Calculated" was determined by how you classified the Property Uses that make up the property. The Property Type you entered may not match the EPA Calculated one, and that's ok, it doesn't have to. You may be tracking your property differently. For example, if you have a property that is 60% office/40% retail, you may classify it as retail, but Portfolio Manager will classify it as office. If you are concerned about the EPA Calculated Property Type, you may want to make adjustments to the [Property Uses](#) you entered or select a new Property Type.

Figure 26

History Log for Office Use

Below is a record of any details you have provided for this Property Use. These values represent how your Property Use has changed over time and are used to provide you with the most accurate metrics possible for your property for any time period. You can also correct any errors you find here. If you have a multi-building property (campus), you need to [update these Property Use Details in BOTH the parent and child properties.](#)

★ **Gross Floor Area**

<input type="checkbox"/>	Current Ac Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/1900 (to present)	413,901 <small>Sq. Ft.</small>	<input type="checkbox"/>	Steve Nunes	06/16/2015

✖ Delete Selected Entries

★ **Weekly Operating Hours**

<input type="checkbox"/>	Current Ac Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/1900 (to present)	55 <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	Steve Nunes	06/16/2015

✖ Delete Selected Entries

★ **Number of Workers on Main 8shift**

<input type="checkbox"/>	Current Ac Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/1900 (to present)	551.97 <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	Steve Nunes	06/16/2015

✖ Delete Selected Entries

★ **Number of Computers**

<input type="checkbox"/>	Current Ac Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/1900 (to present)	527.8 <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	Steve Nunes	06/16/2015

✖ Delete Selected Entries

★ **Percent That Can Be Heated**

<input type="checkbox"/>	Current Ac Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/1900 (to present)	50 % or more <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	Steve Nunes	06/16/2015

✖ Delete Selected Entries

★ **Percent That Can Be Cooled**

<input type="checkbox"/>	Current Ac Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/>	01/01/1900 (to present)	50 % or more <input checked="" type="checkbox"/> Use a default	<input type="checkbox"/>	Steve Nunes	06/16/2015

✖ Delete Selected Entries

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

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Figure 27

Submitting Benchmarking Data to the City of Kansas City

This step will require you to use a link provided on our [Benchmarking Website](#) or through email (benchmarking@kcmo.org). For this demo we are going to use the Website. If you have not already done so, please go to kcmo.gov/kcgreen/benchmarking/. On this page you should see multiple areas with a link titled **Submit My Data**. Please click on this.

Energy Empowerment Ordinance (benchmarking)
Ordinance: [Compliance](#) | [Training](#) | [Resources](#) | [Submit My Data](#)

On June 4, 2015, Mayor Sly James and the City Council of Kansas City adopted the [Energy Empowerment Ordinance](#) to improve the city's management of resources by requiring owners of large buildings to benchmark and report their energy and water use. The goal is to help businesses and residents to save money on their utility bills and create local jobs in energy efficiency. This information will also help our local energy utilities and the City government target future financial and technical assistance.

Benchmarking ID & Covered Property List
[Search for your building](#) to find your KCMO Benchmarking ID and other building-related information on our Covered Property List. If you are not able to find your building or your Benchmarking ID or have any additional questions, please complete the [Contact Us Form](#).

Download the [Requests for Changes and Exemptions](#) for information on changing the information on record in the Covered Property list, or to request an exemption to a Benchmarking Submission.

Submitting Data to the City

The program requires benchmarking to be done and submitted to the City through Energy Star Portfolio Manager. For Steps on how to use the tool, please [click on the Compliance tab](#) at the top. Once all information is completed in Portfolio Manager please use the [Submit My Data](#) link to finish the process.

Energy Empowerment Ordinance Help Center | benchmarking@kcmo.org | 816-513-3462

Figure 28

Next it will ask you to sign in if you haven't. Once you do it will take you to a form. On this form scroll down to the bottom, select your property and click **Generate Response Preview**.

Your Response

Select Information to Include:

Timeframe: *

If the data requestor has specified a timeframe for the request, you will not be able to change it.

Properties: *

The data requestor may have asked for one or more standard IDs to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response.

Generate Response Preview

Previewing Reports

Making selections here will include specific properties and timeframes in your response. You may preview your response before you send it. However, Portfolio Manager will need to prepare the preview in order for you to view it. Large responses may take more time to prepare. Your response preview will be available from the "Templates & Reports" section on the Reporting tab when it is ready.

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Figure 29

Next go to the **Reporting Tab** up at the top in Portfolio Manager (tabs will show MyPortfolio-Sharing-Reporting-Recognition).

Under this tab, there will be a template that says **Data Request [calendar year] Reporting Template...** Click on the drop-down box to the right and click **Send Response**.

MyPortfolio | Sharing | **Reporting** | Recognition

Charts & Graphs

Weather Normalized Source EUI
How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Score Card](#)

Templates & Reports (11) [Create a New Template](#)

Name	Status	Action
Philadelphia Custom Reporting Template 2016 (Request from City of Philadelphia Office of Sustainability)	No Response Preview Generated	I want to...
Energy Performance	Generated: 6/19/2017 2:32 PM	I want to...
Data Request 2016 Reporting Template (May 01 2017 Deadline) (Request from Energy Empowerment Program)	Response Preview Generated: 6/09/2017 12:33 PM	I want to... I want to... Edit Properties and Timeframe Preview Response Download Preview in Excel Generate an Updated Response Send Response
Waste Performance	No Report Generated	
Emissions Performance	No Report Generated	
Performance Highlights	No Report Generated	

Figure 30

Lastly, the next page will have you e-sign and you'll be done. An email should be sent by ENERGY STAR Portfolio Manager to you confirming your submittal.

Common Errors

This section will list the common errors and walk through how to fix them. Some of the most common errors established by the Benchmarking Help Center are:

- Missing a few days in the calendar year submitted on.
- Gap in Meter Dates.
- Energy/Water usage entered on a date before the listed year built.
- Energy/Water Usage entered on a date before the Meter became active.
- Meter Active Date Labeled on a date before the year the building was built.
- No Meter Associated with This Property.

To be able to successfully troubleshoot these and other errors, it is recommended that you become familiar with the **Using the Error Checker** and **Editing Information** sections of this document.

Reports

This intent of this section is to help you learn how to generate reports to better understand your own data. For those subject to the Energy Empowerment Ordinance, you are not required to generate any additional reports in this manner but are encouraged to read this section if you are interested in making the most of your consumption information.

******This may be one of the few times you will ever hear this, but it is better to do this part in Internet Explorer. Google Chrome has been known to cause some troubles making report generation impossible.******

Starting from the home page, you will want to click on the tab at the top named **Reporting**.

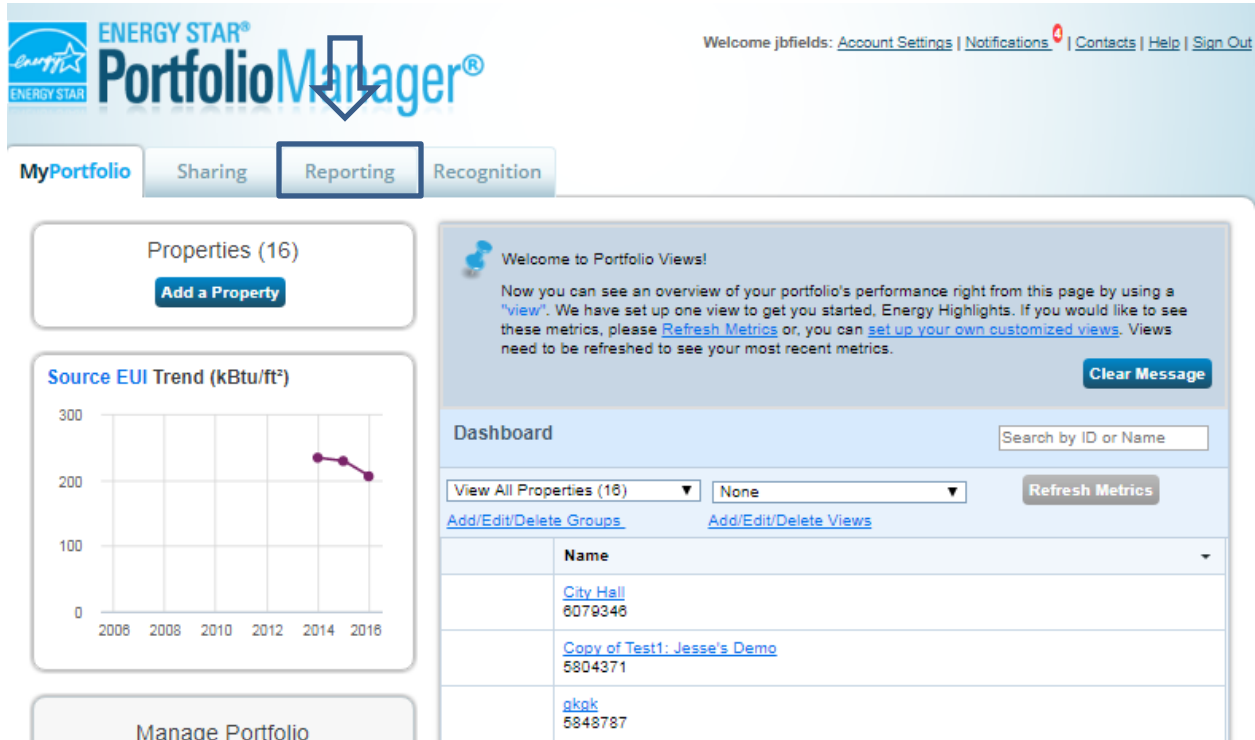


Figure 31

On this page, you will see several sample or previously existing templates. However, we will want to create our own. Please click on the **Create a New Template** button near the top right.

Templates & Reports (10)

[Create a New Template](#)

Name	Status	Action
Data Request:2016 Reporting Template (May 01 2017 Deadline) (Request from Energy Empowerment Program)	No Response Preview Generated	I want to...
Performance Highlights	No Report Generated	I want to...
Energy Performance	No Report Generated	I want to...
Emissions Performance	No Report Generated	I want to...
Water Performance	No Report Generated	I want to...

Figure 32

It will take you to a page where you can give the template a title, select the report timeframe, select either a single property or multiple properties, and lastly select the metrics that will be displayed based on your property and the information you have entered.

For this demo, please enter in the information as listed below:

Name: City Hall (any name will work for this box).

Timeframe: Current Year, for Energy.

Properties: One Property, City Hall.

Now click on the box that says **Select Information & Metrics**.

The screenshot shows the 'Edit Report Template: City Hall' interface in Energy Star Portfolio Manager. The interface is divided into four numbered steps:

- 1 Name Your Template**: The 'Name' field is set to 'City Hall'. A note below says 'Please provide a unique name for this template'.
- 2 Select Timeframe**: The 'Timeframe' is set to 'Current Year' and 'for' is set to 'Energy'. A note below states: 'Each property must have 12 full months of data for metrics to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report. Pick the last day of the 12 month period that you want.'
- 3 Select Properties**: The 'Properties' dropdown is set to 'One Property' and the selected property is 'City Hall'.
- 4 Select Information & Metrics**: A button labeled 'Select Information & Metrics' is highlighted with a red box. Below it, it says 'Selected Items: 13'.

At the bottom right, there are two buttons: 'Save Template' and 'Cancel'. On the right side of the form, there are two 'Tip' boxes providing additional guidance on naming templates and requesting information from other users.

Figure 33

You will now see many categories on the left-hand side, when you click on a category, you will see different metrics to select from.

*****Please note, Property Name, Parent Property Name, Portfolio Manager Property ID, and Portfolio Manager Parent Property ID will be automatically selected for you.*****

For this demo, please enter in the information below:

Tab- Property Information

- Address 1.
- Property GFA-Self-Reported (ft²).

Tab- Energy Use by Fuel Source

- Electricity Use- Grid Purchase (kWh).
- District Steam Use (kBtu).
- District Chilled Water Use (kBtu).

TAB- Energy Performance Metrics

- Energy Star Score.
- National Median Site EUI (kBtu/ft²).
- % Difference from National Median.
- Site EUI (kBtu/ft²).

At the bottom you should show that 13 of 50 maximum are selected. Please click on **Apply Selection**.

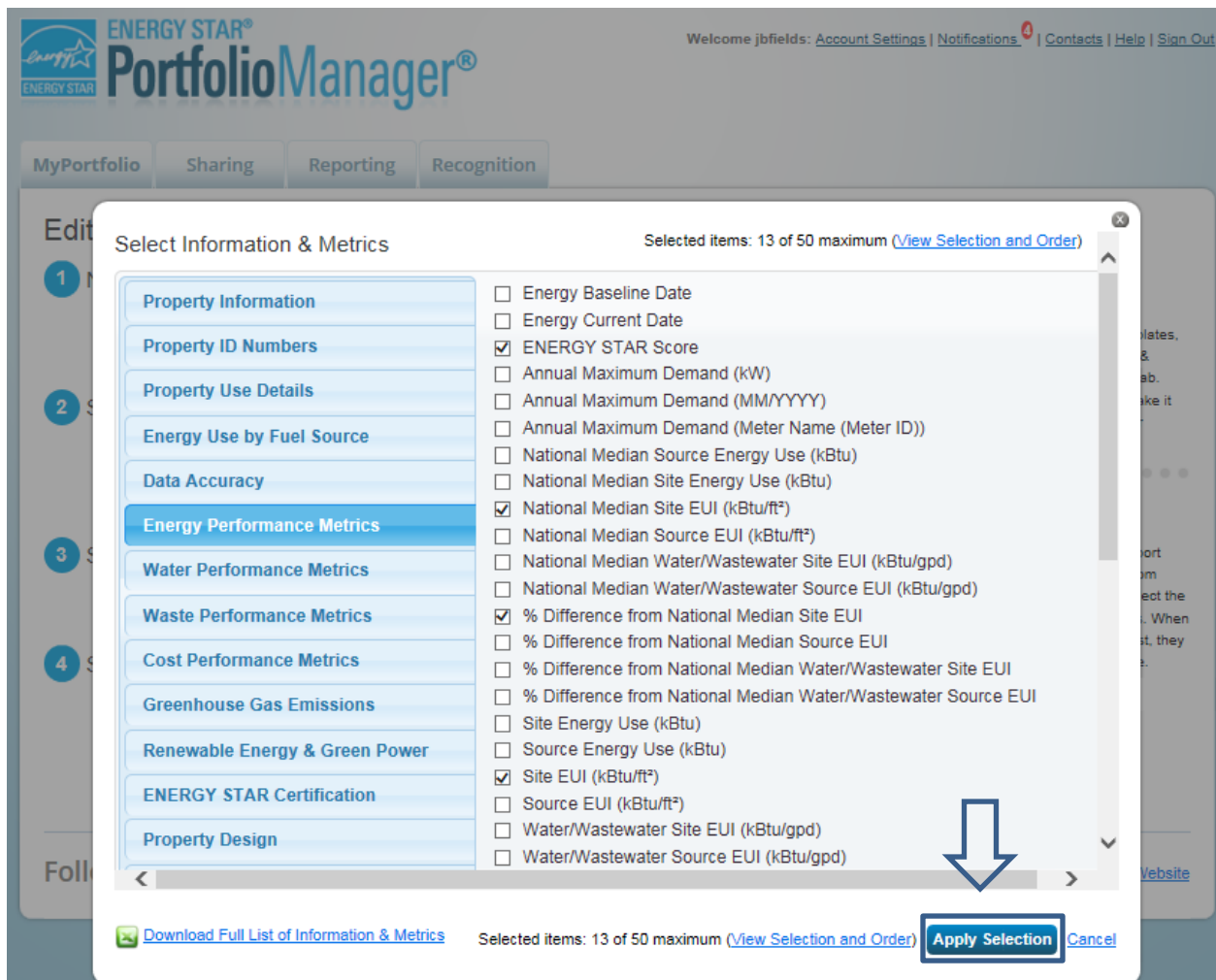


Figure 34

The window will close and now you should click **Save Template**.

This will now take you back to the report tab where you can now see the report.

You will want to click on the action drop-down box and click **Generate Report**.

MyPortfolio | **Sharing** | **Reporting** | **Recognition**

Your template has been successfully saved.

In addition to saving your template for future use, you can go ahead and use it right away to:

- [Generate a Report](#) – Pull information you have selected from your account and into your template to create a report for download.
- [Request Data from Others](#) – Ask other people to fill out your template with information from their accounts.
- [Share Template with Others](#) – Give your template to other people so that they can use it to prepare spreadsheets from their accounts.

Keep in Mind: If you have chosen a large number of properties and/or metrics in your template, it may take a little longer to generate your report. [Learn more about creating large spreadsheets.](#)

Charts & Graphs

Weather Normalized Source EUI
How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Scorecard](#)
- [Water Scorecard](#)

Templates & Reports (11)

[Create a New Template](#)

Name	Status	Action
Data Request:2016 Reporting Template (May D1 2017 Deadline) (Request from Energy Empowerment Program)	No Response Preview Generated	I want to...
City Hall	No Report Generated	<ul style="list-style-type: none"> Generate New Report Edit this Template Share this Template Request Data using this Template Delete this Template I want to...
Performance Highlights	No Report Generated	
Energy Performance	No Report Generated	

Figure 35

This will now allow us to access the information. Please click the **Drop-Down Box again**, now you can see the options to **View the Report** or **Download** it. You may also edit it if you want to add or remove something. In addition, you can use this to request data from another user.

For this demo, please click **View Current Report**.

Name	Status	Action
City Hall	Generated: 10/20/2017 3:37 PM	<ul style="list-style-type: none"> View Current Report Download Current Report in Excel Download Current Report in XML Generate New Report Edit this Template Share this Template Request Data using this Template Delete this Template
Data Request:2016 Reporting Template (May 01 2017 Deadline) (Request from Energy Empowerment Program)	No Response Preview Generated	
gghg	No Report Generated	
Performance Highlights	No Report Generated	

Figure 36

You can now scroll through all the information that you selected. **As more information is stored into Portfolio Manager, the more meaning you can obtain from the results.** The reporting tool allows you to take that information and put it into an Excel or XML format.

MyPortfolio
Sharing
Reporting
Recognition

View Report: City Hall

Date Generated: 10/20/2017 03:37 PM EDT

Number of properties in report: 1

The following displays the data generated from your [report template](#). It includes the information and metrics that you selected for the properties you included. You may "Generate a New Report" to get updated information from the action menu for this report template.

Information and Metrics
1 records

Property Id	Property Name	Year Ending	Address 1	Property GFA - Self-Reported (ft²)	ENERGY STAR Score	National Median Site EUI (kBtu/ft²)	% N E
6079346	City Hall	12/31/2016	414 E 12th St	413901	95	137.9	-5%

<
>

Generate New Report
Download Excel
Download XML
Close

Figure 37

Upcoming Document Updates

This section is to list some of the updates that will be present in the next version of this Document:

- FAQ Section
 - Deleting Meters
 - Deleting Property
 - When and how to add parking
 - Building use Metrics Changed this year
 - Utilities- Reading my Bill.
 - Data Centers
- Possible **Video Walk-Through** of materials present in this document.
- More ways to **Download Information**.
- Link to **Accompanying Document** that **Explains the Energy Star Score, Energy Star Certification and Upcoming Portfolio Manager Updates** that could affect scores and certification.
- Typographical edits.