Energy Management Program Resource #1: Sample Template for Uploading Data to ENERGY STAR™ Building Portfolio Manager

This template is intended to be used as a step-by-step resource for local governments when developing or implementing energy management program elements. As part of an Energy Management Program or Plan, accounting for your energy use is a best practice and an important early action to establish historical and forecast consumption and costs. Establishing a common collection point for utility data and tracking data in a common location can enhance a local government's ability to establish historical utility usage, understand utility costs, and identify irregularities in the data that may indicate mechanical, electronic, billing errors, or behavior changes occurring in facilities.

Energy Star^{TM} Building Portfolio Manager is a free, online tool developed and administered by the U.S. Environmental Protection Agency. Building Portfolio Manager can measure and track energy and water consumption, as well as greenhouse gas emissions for local governments, private organizations, or others looking to benchmark the performance of one building or a whole portfolio of buildings, all in a secure online environment.

This resource includes an Excel Sample Template that can be used as a baseline utility collection spreadsheet for those that have Building Portfolio Manager accounts. Many local governments use an Excel file to track their utility usage and costs. This Excel Sample Template provides the minimum elements that are data inputs for Building Portfolio Manager. Collecting data for your facilities (by building) in this Excel Template would allow a local government to import this data into an Energy Star Building Portfolio Manager account, once an account is established. Local governments may modify this resource to accommodate their individual needs.

The Excel Sample Template to update existing properties in Building Portfolio Manager with new bill data is here: http://bit.ly/2Yev2qN.

Additional resources:

- Energy Star^{TM} Building Portfolio Manager
- Energy Star^{TM} for State and Local Governments

To Set-Up an Energy Star^{TM} Building Portfolio Manager Account visit (right hand of screen):
https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager

Using ENERGY STAR™ Building Portfolio Manager Excel Templates

Example Template: http://bit.ly/2Yev2qN

Using the Linked Example Template

1. Some information has been provided for you on each tab (shown in italics, with a gray background.) This data is provided only as a reference. Do not edit anything with a gray background. If you see something that is incorrect, you need to fix it in portfolio manager.
2. You will see a tab corresponding to each meter type that you chose to update when creating this template.
3. Explanations for many column headers are available by clicking that column.
4. Items with pre-defined options (drop-down menu within cell when clicked) must use a value from the list. For best results, select the option from the list, rather than typing in it.
5. Double check your data *before uploading it.* **There is no "un-do" function!**

Use this option ONLY to become familiar with data inputs for Building Portfolio Manager

Using a Building Portfolio Manager Custom Template

1. Login to Building Portfolio Manager
2. Click "Upload and/or update multiple properties" (on the left of home screen)
3. Click "Create an Upload Template" (blue button on the right)
4. Select "Add Bills to existing Meters (i.e., meter consumption information)"
5. Select number of properties (one, many, or all)
6. Click which meter types you wish to upload (electric, gas, water)
7. Type # of bills for each meter you want to upload (# of billing cycles)
8. Download Template (Excel Spreadsheet)

Use this option when ready to begin using Building Portfolio Manager to manage your data

Building Portfolio Manager Uploading Instructions

1. When you have completed your spreadsheet, save it to your computer.
2. Click the link at the bottom of the MyPortfolio page to "Upload and/ or Update Multiple Properties".
3. Next to Type of Upload, select your file type.
4. Next to Upload Template, click Browse and select your file. Once certain it is the correct file, click the blue upload button.
5. If the template is successfully uploaded, you will see a success message. Large files may take some time to process. You can check the status on the "Upload and/or Update Multiple Properties" page.