

Benchmarking in Portfolio Manager – Instruction Sheet #2



The below instructions cover creating an advanced report, sharing properties, and NYSERDA Clean Energy Communities (CEC) Program submission details in EPA's Energy Star Portfolio Manager tool: <https://portfoliomanager.energystar.gov/pm/login.html>

1. The requirements for earning CEC Credit for Benchmarking – Advanced Reporting include: creating an Advanced Report and posting it to the municipal webpage, grouping and sharing buildings with NYSERDA CEC1, and taking screenshots of both of those actions. Here, we'll show you how to complete these action items.
2. First, we'll go over **creating an Advanced Report**. (10 min)
 - a. First, head to the Reports tab, and select "Create a New Template."
 - b. Name your template "CEC Annual Benchmarking Report", select 'Single Year' and put in December 31st of the desired year that you want to generate a report for. This part will be updated every year.
 - c. Select the properties that you want to generate a report for.
 - d. Click 'Select Information and Metrics' to generate a pop-out menu. The metric tabs that we will use here are: Property Information, Energy Performance Metrics, and Greenhouse Gas Emissions.

In the **Property Information** tab, check the boxes for:

- | | |
|------------------|---|
| - Address 1 | - Postal Code |
| - Address 2 | - Country |
| - City | - Property GFA – Self-reported (ft ²) |
| - County | - Primary Property Type – Self Selected |
| - State/Province | |

i.

In the **Energy Performance Metrics** tab, select the following metrics to track:

- ENERGY STAR Score *
- Site Energy Use (kBtu)
- Site EUI (kBtu/ft²) *
- Weather Normalized Source Energy Use (kBtu) *
- Weather Normalized Site EUI (kBtu/ft²)

*These are required metrics

ii.

In the **Greenhouse Gas Emissions** tab select the following metrics to track:

- Total GHG Emission (Metric Tons CO₂e)
- Total GHG Emissions Intensity (kg/CO₂e/ft²)

iii.

- e. Once all this information is filled out, select 'Apply Selection' to return to the previous page, and click 'Save Template'.
- f. Now, you can use this template to generate a report. On the Reporting tab, under the "My Custom Reports" tab, you should see the custom report template that you built. Under the "Action" column, click on the drop down box, and select "Generate New Report." You'll need to modify the template to change the year, and create a separate report for each of the two years of data that you've collected.

