Understanding Your Building's Energy Performance

A Step-by-Step Guide to Benchmarking Using Portfolio Manager

Overview

The Environmental Protection Agency's (EPA) ENERGY STAR® Portfolio Manager is a free online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions—all in a secure online environment.

Southern California Edison (SCE) has created this document to provide step-by-step instructions for registering to access energy usage data on Portfolio Manager to benchmark your buildings. Benchmarking enables you to compare your building's energy performance with that of similar buildings. All building types can be entered into Portfolio Manager, resulting in energy and water benchmark values.

Some buildings will also receive an ENERGY STAR score, indicating energy efficiency on a 1-100 scale, with 1 being low and 100 being high. A score of 75 or better indicates top performance, and means your building may be eligible to earn the ENERGY STAR label and recognition. For the building types that currently are not eligible to receive this score, EPA provides a list of reference energy performance targets which are based on the median energy use calculated across similar types of buildings.

Property/Building Registration Process

You begin the registration process by:

- Registering for a SCE.com account (if you do not already have one)
- Setting up your property(ies)/building(s).
- Identifying building tenants.

Once the registration process is complete on SCE.com, you receive an alpha-numerical Data Sharing Key. This key is entered when you set up your account in Portfolio Manager. The Data Sharing Key enables the building's energy usage data to transfer from SCE to Portfolio Manager. Initially, this will be the most recent 24 months of your building's electric energy use. Thereafter, monthly energy data will be added automatically.

This guide will walk you through the process of registering to benchmark your building(s) on SCE.com and on Portfolio Manager. SCE also offers free in-person benchmarking classes on how to use Portfolio Manager called **Benchmarking Energy Use in Buildings**. To register for the next class, visit: https://www.sce.com/wps/portal/home/business/Energy-Education-Center/.

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Links and Resources

- SCE's Benchmarking Website: www.sce.com/benchmarking

- SCE Benchmarking Email: benchmarking@sce.com

- ENERGY STAR's Portfolio Manager Benchmarking Website: www.energystar.gov/benchmark

- For general ENERGY STAR Portfolio Manager questions visit www.energystar.gov/buildingshelp.

- For more information about compliance with the AB 802 Building Energy Benchmarking Program, visit http://www.energy.ca.gov/benchmarking/.

Step 1 Gather Data for Benchmarking

The gathering of required data to benchmark a building(s) is usually the most laborious of all steps, as well as the step that requires the most accuracy. Incorrect data may lead to incorrect benchmarking results. This section outlines some of the information you will need to register your property(ies) and building(s).

Property Information

    A.   Identify the property(ies) and the number of buildings on each property.

    B.   Note each property's name, street address, ZIP/postal code, year property was built.

Building Information

    A.   Note the street address and ZIP/postal code of each building on the property. If a building is part of a multi-family dwelling, do not include apartment or unit numbers.

    B.   Identify the building type (e.g., commercial or residential) for each building on the property.

    C.   Identify the number of tenants in each building on the property.

    D.   Gross floor area in square feet of each building on the property.

    E.   Property use details (e.g., weekly operating hours, number of computers, number of workers on the main shift, etc.) that are specific to the property. See http://www.energystar.gov/buildings/tools-and-resources/list-portfolio-manager-property-types-definitions-and-use-details for specific data needed for your property type.

Other Information

    A.   Collect the additional information you may need to complete the registration process.

- **Email Address**
  Unless otherwise specified, SCE will use your Primary Email Address to communicate with you during the registration process. When sharing the SCE.com account with others for benchmarking purposes, it is advisable to set up a unique User ID and Password – one that is not associated with an individual.

If you have any questions, email benchmarking@sce.com.

You now have all the information you need to benchmark your building. Proceed to Step 2.

Step 2 **Create a SCE.com Account** (if you do not have one)

NOTE All screen shots are shown below the text describing the screen.

Tip: If you have the ability to have two screens on your computer open at the same time, keep this step by step guide open while you enter information on SCE.com and in the Portfolio Manager.

1. Open **SCE.com**.

    The SCE.com Home page displays.

2. Scroll down to the bottom and click **Your Business.**
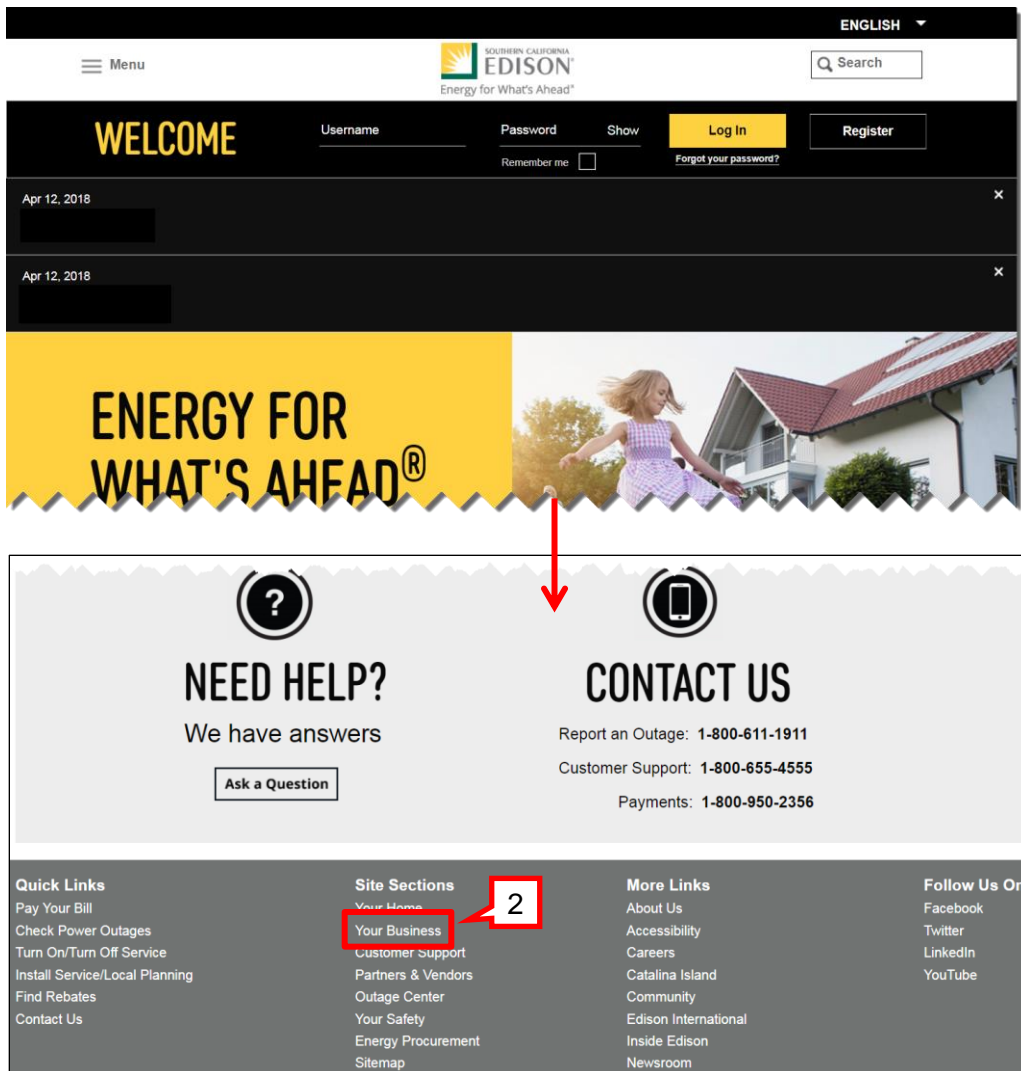
Step 2: Create a SCE.com Account

3. In the navigation section, go to **Tools & Resources** > **Benchmark Your Building**.
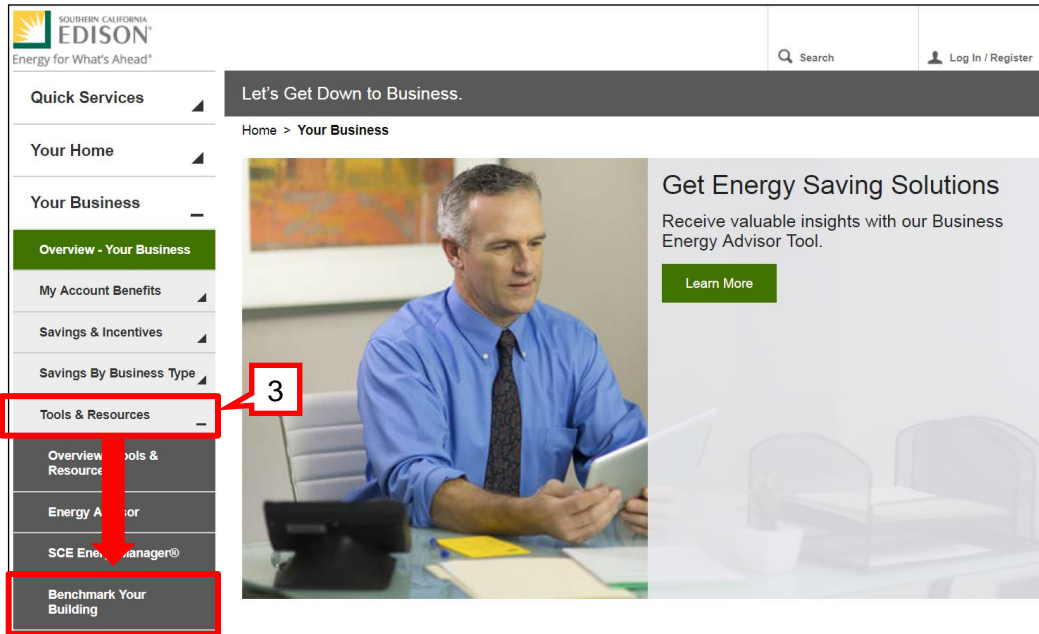
The Benchmarking landing page displays that guides you through the registration process.

| NOTE | You must be registered on SCE.com first before beginning the Benchmarking Portal registration process. |

Going forward, references to a building owner include a consultant/agent acting on behalf of the owner.

3a. If you have an SCE.com account, **Log In** and proceed to the next section, **Step 3: Enter Property/Building Information**, on page 9.

3b. If you do not have a SCE.com account, click **Register Now** and complete the registration process by proceeding to 4 on page 6 after reading the Note below.

When registering for an SCE.com Benchmarking account, you are directed to a page that enables you to set up a User ID and Password.

4. Enter your **First** and **Last Names**.

    Tip: It is recommended that you set up a unique User ID (email) and password when sharing the account. Use an email address that is both shared and checked frequently and a password that can be shared. Also, ensure that the email address you plan to use has not been previously registered as a SCE.com user ID.

5. Enter an **Email Address**.

6. Enter a **Password**.

7. Confirm your new **Password**.

8. Click **Next**.

The Terms and Conditions window displays.

Step 2: Create a SCE.com Account

9. Read the **Terms and Conditions**, and then click **I have read and agreed** button.

The Check Your Email page displays.
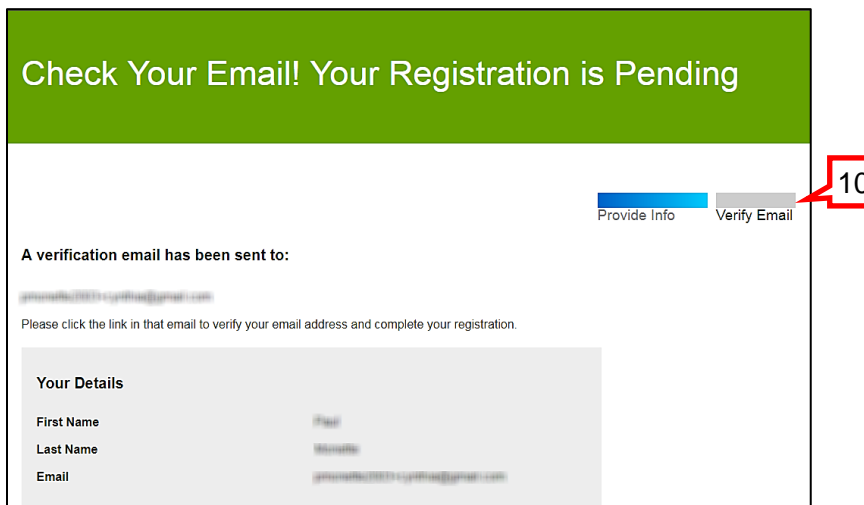
10. Open your email account, and click the link provided to verify your email address.

> ⚠️ If you do not verify your email address within 24 hours, your SCE.com User ID registration will be canceled.

Step 2: Create a SCE.com Account

Once the link is clicked in your email, you are directed to the Benchmarking login page.

11. **Log In**.
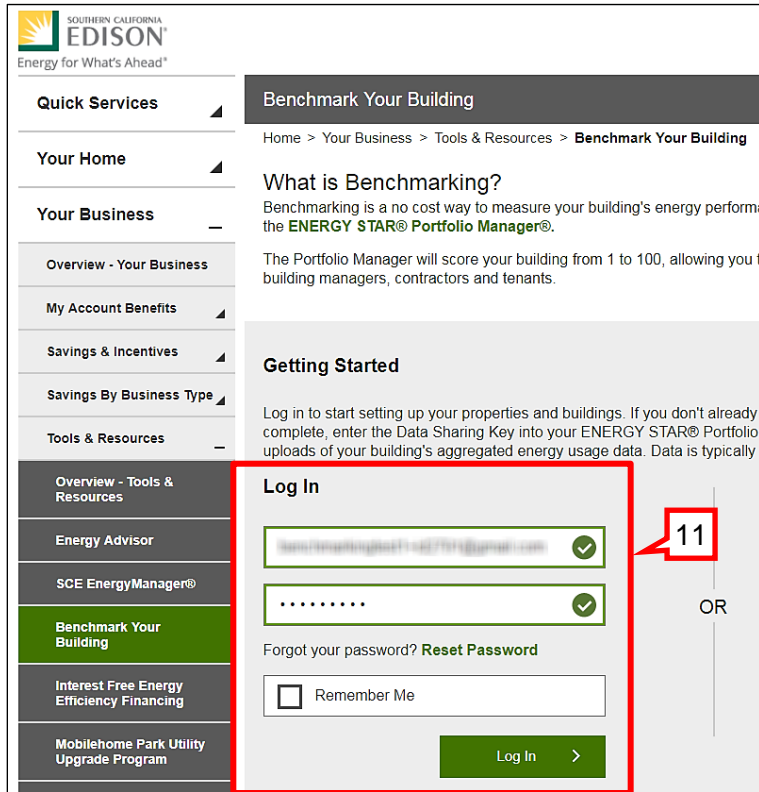
The Benchmarking Dashboard displays.
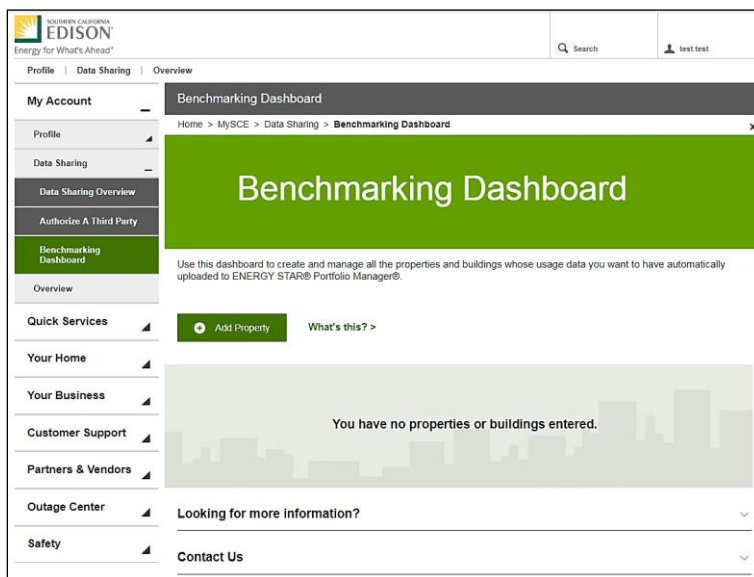
Step 2: Create a SCE.com Account

NOTE If you have an SCE.com account but have not completed the Benchmarking Registration process, navigate to the Benchmarking Log In page as described in 1-2, Log In, and continue the registration process.

If you have registered to benchmark your Property/Building(s) previously and have not read and accepted the Updated Benchmarking Terms and Conditions, you will do the following:

1. **Log In**.

   The Updated Benchmarking Terms & Conditions display.

2. Read the **Updated Benchmarking Terms and Conditions** (click the **Show More** button to see all Terms and Conditions).

3. Check the box next to **I have read and agree to the Terms and Conditions**.

4. Click **Next**.
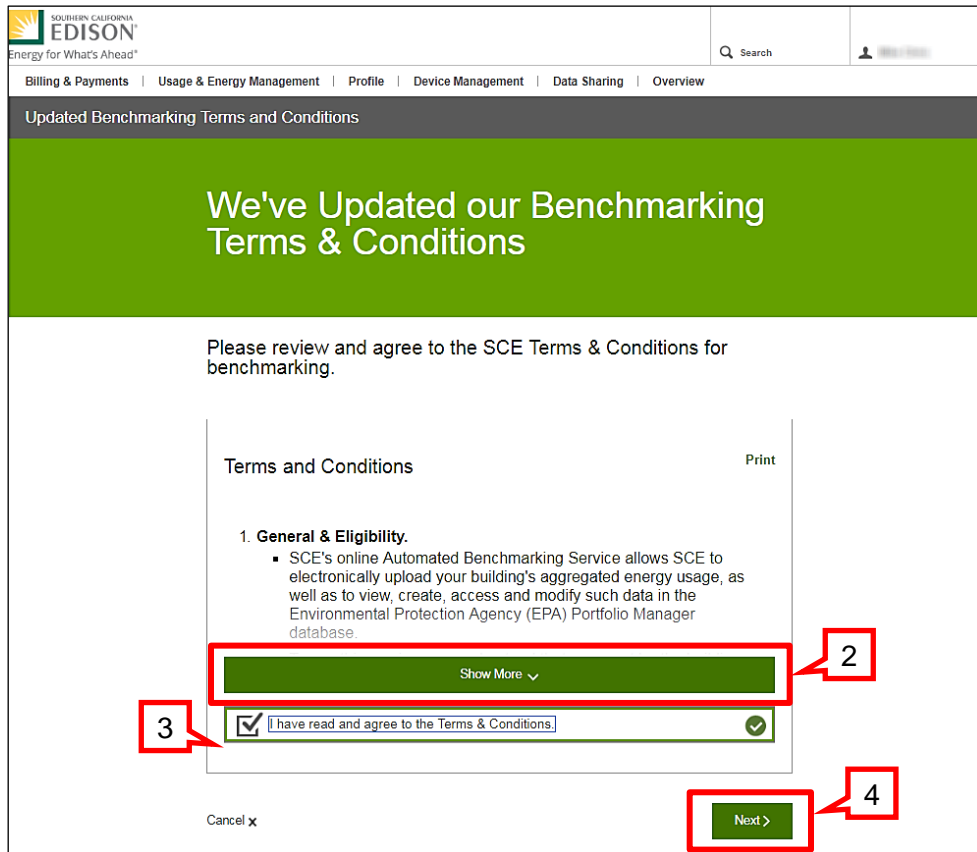
Clicking Next directs you to the Benchmarking Dashboard.

<table>
<tr><td>Step **3**</td><td># Enter Property/Building Information</td></tr>
</table>

1. If not logged into SCE.com go to **Your Business > Tools & Resources > Benchmark Your Building**.

2. **Log In** with your SCE.com **User ID** and **Password**.

   The Benchmarking Dashboard displays.

3. Click **Add Property**.
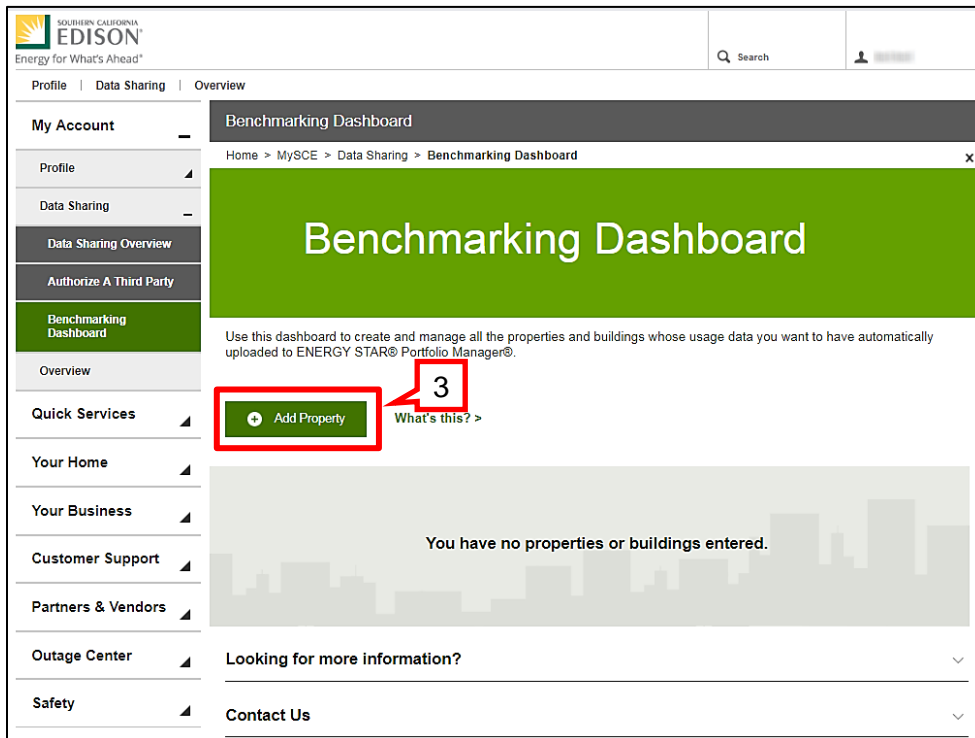
The Add Properties & Buildings window displays.

Step 3: Enter Property/Building Information

Note the reminder that data cannot be shared for buildings with less than 5 tenants if any tenant is residential.

4. Enter the **Property Name**.

5. Click **Next**.

The next window that displays shows the property entered and provides a button to Add a Building(s).

6. Click **Add A Building**.

Step 3: Enter Property/Building Information

The Add Buildings window displays.

> **NOTE** Beginning in 2018 and annually thereafter, a covered commercial building that has more than 50,000 square feet of gross floor area and no active residential utility accounts must register due to the AB 802 Public Disclosure requirement.
>
> Beginning in 2019 and annually thereafter, a covered building where there are 17+ residential active utility accounts and more than 50,000 square feet of gross floor area must register due to the AB 802 Public Disclosure requirement.
>
> The data obtained for covered buildings that are required to register must be reported to the Energy Commission.

7. Enter a **Building Name**.

8. Click **Yes** if you are . . .**adding this building to comply with the Building Energy Use Benchmarking and Public Disclosure Program**. Click **No** if not.

9. Click **Add This Building**.

The next window displays the added building to the property.

Step 3: Enter Property/Building Information

10. Continue adding buildings to the property by clicking **Add Another Building**, or click **Next** when finished adding buildings.
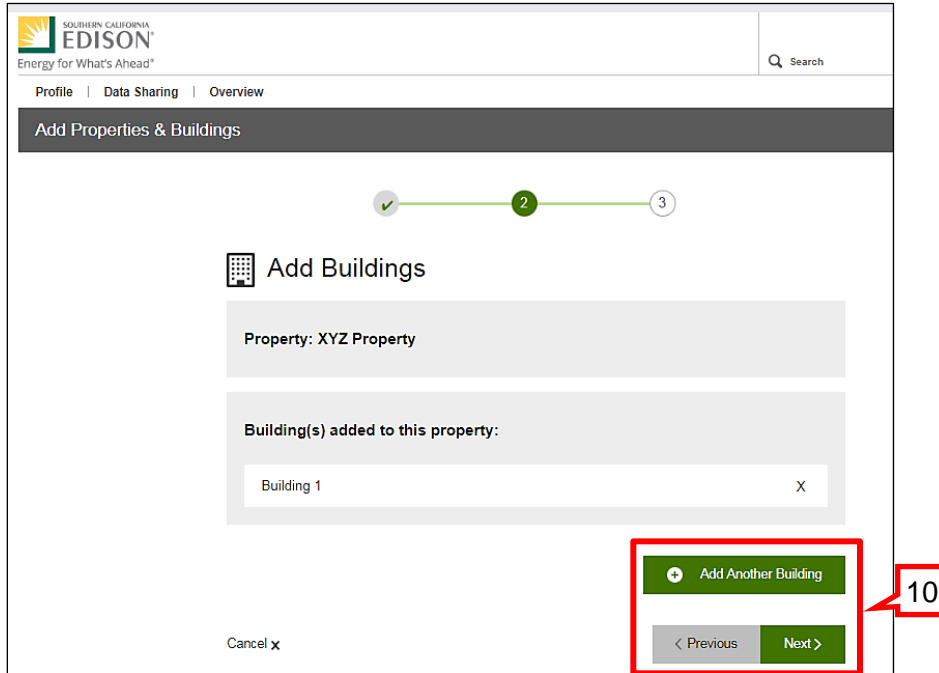
After clicking Next, the Enter Addresses window displays.

Step 3: Enter Property/Building Information

Add Building Addresses

The following instructions provide a guide to entering addresses for buildings.

♦ **Buildings with multiple addresses**: **Enter each address that applies to the building**. Example: A commercial building with unique addresses for each business renting space (e.g., 123 Any Street, 125 Any Street, 127 Any Street).

♦ **Buildings with multiple units or apartments**: **Enter one address for each building without identifying tenant units or apartments**. Example: An apartment building with multiple units (e.g., 123 Any Street **instead of** 123 Any Street, Unit A, 123 Any Street, Unit B). You can select the tenants that live at the specified address. You do not need to identify the address for the individual units.

Step 3: Enter Property/Building Information

♦ Apartment complexes with multiple buildings: **Enter addresses for each building in the complex, but not the units within a building**. Example: An apartment complex with 26 buildings, each with 12 units – addresses are entered for the buildings (e.g., 123 Any Street Bldg R, 123 Any Street Bldg S, etc.) but not the individual units. Tenants are selected based on the building address.

♦ Buildings with both multiple addresses and units or apartments: **Enter the unique address(es) separately and the units or apartments under one address.** Example: A high-rise apartment complex with multiple dwellings (one address) and cleaners, deli, and pharmacy within the building, each with different unique addresses (e.g., dwellings: 123 Any Street; businesses: 124 Any Street, 125 Any Street, and 126 Any Street).

Step 3: Enter Property/Building Information

11. Click **Add An Address**.
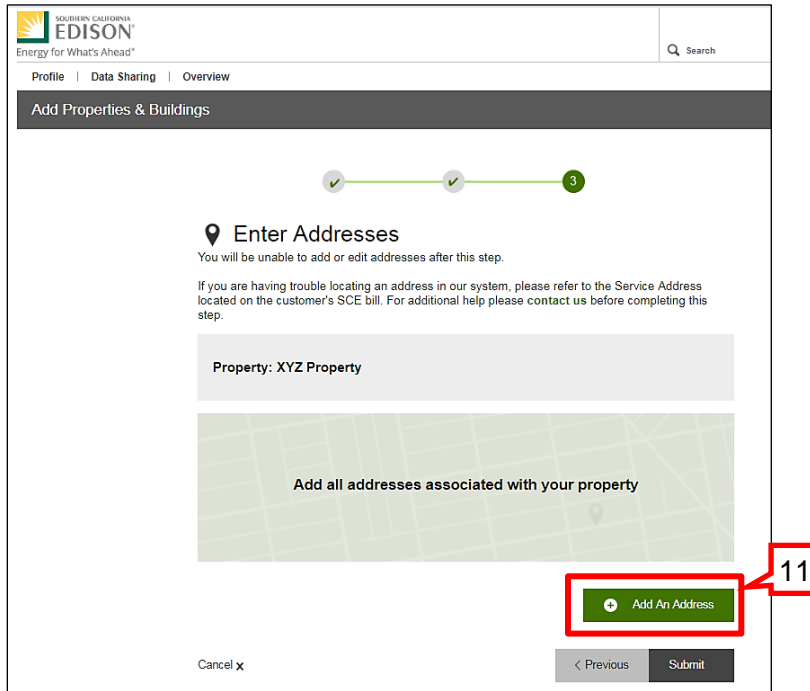
The Enter Addresses window displays.

12. Enter the **Zip Code** for the Property.

13. Click **Next**.
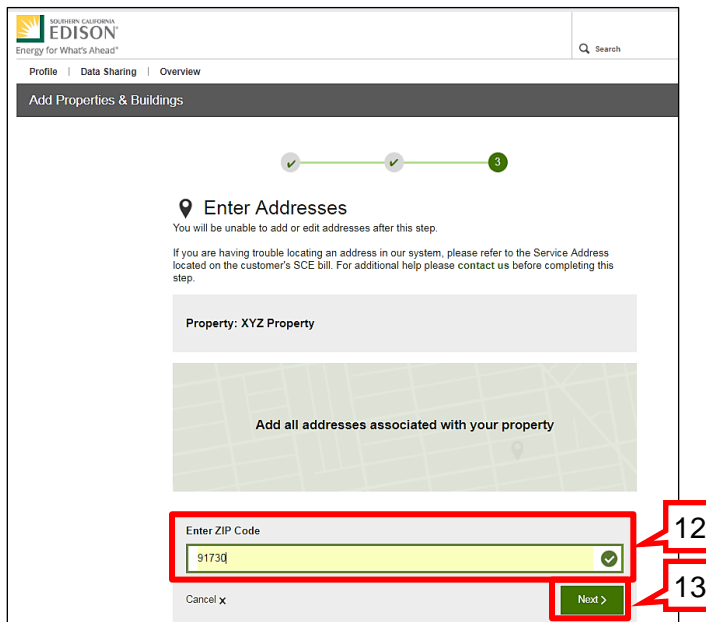
Step 3: Enter Property/Building Information

The next window that displays enables you to enter the Street Number and Name.

14. Enter the **Street Number** and **Street Name**.

15. Click **Next**.

Step 3: Enter Property/Building Information

NOTE If the street number or name entered does not match one that actually exists, clicking Next will display a drop-down field from which to select the correct address.

Once the correct address is selected and you click Next, a window displays for you to confirm the address.

Step 3: Enter Property/Building Information

*You can click the **Incorrect Address?** button to edit the address if needed.*

16. If the address is correct, click **Next**.

After adding an address, you are returned to the window where you can click Add Another Address, if applicable.

Step 3: Enter Property/Building Information

17. Add any additional property/building addresses as applicable.

18. Click **Submit** when finished adding addresses.

| | NOTE | A Building(s) and/or Address(es) can be removed as desired by clicking the **X** next it in the building and/or address confirmation window. |

Step 3: Enter Property/Building Information

Once all property/building addresses have been entered and submitted, the Property Profile Confirmation window displays.

19. Click **Return to Dashboard**.
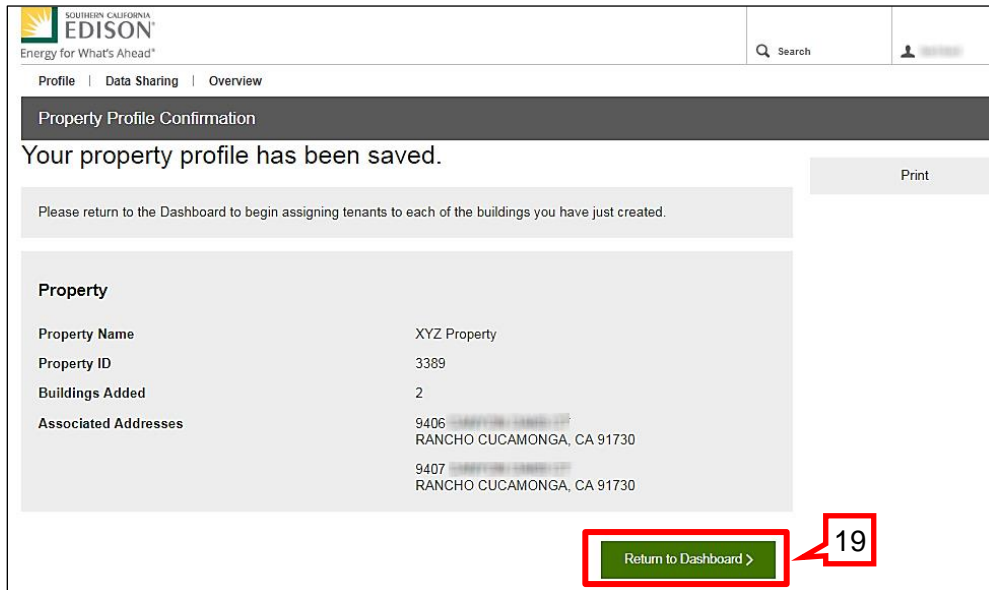
*The Benchmarking Dashboard displays. Note that you can continue to add a Property or Building as required. Also note that Action is Required (**Add Tenants**) for each building to complete the registration. Adding tenants is described in Step 4 beginning on the next page.*
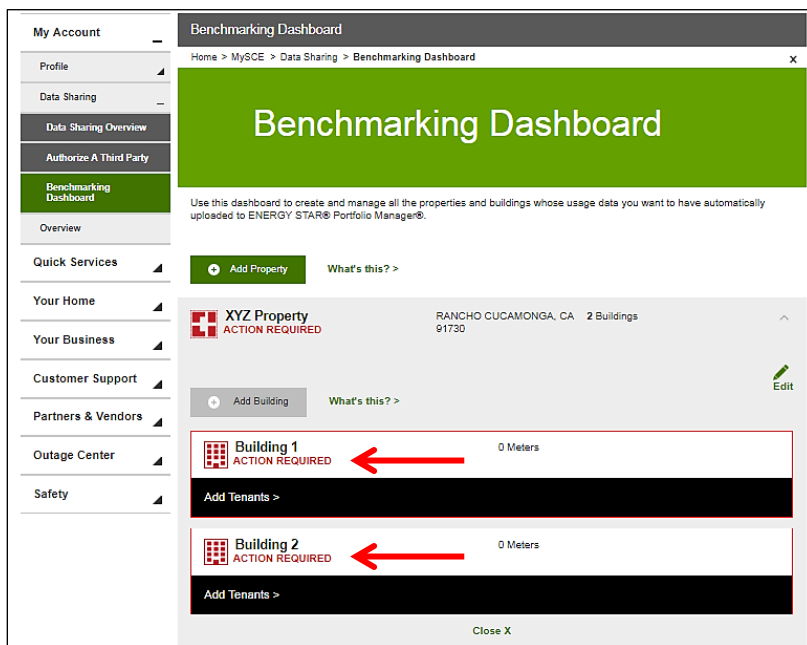
Step 4	**Building Tenant Set-up**

Tenant Authorization (if required)

Commercial buildings with fewer than three (3) tenants need tenant consent before the registration process can be completed.

NOTE	At this time, residential buildings with fewer than five (5) tenants cannot register to benchmark data via Portfolio Manager.
	Also, mixed use buildings with fewer than five (5) residential tenants cannot register to benchmark data via Portfolio Manager.

If Tenant Authorization is required, a button is provided on the Data Sharing Key confirmation page to download an Authorization Form. This form can be given to your tenant(s). A link to instructions on completing the form is also provided.

You will still receive a Data Sharing Key for each building set up and can create and set up an account in Portfolio Manager for each building, but no data will be shared until all authorization forms are received and approved.

If Tenant Authorization is not required, you will not see the button and link.

Step 4: Building Tenant Set-up

This section outlines the steps for setting up tenants in the Benchmarking Portal. If not logged in, navigate to the **Benchmark Your Building** log in page on SCE.com, and **Log In**.

The Benchmarking Dashboard displays.

1. On the **Benchmarking Dashboard**, click the down-arrow next to a Property to display its buildings.

   There may be multiple property blocks with their associated buildings, depending on the number of properties and buildings you set up in the previous Step.

2. In one of the building blocks, click **Add Tenants**.

NOTE	Blocks are color-coded: red means that action is required, and green means no action is required.

Step 4: Building Tenant Set-up

The Select Tenants window displays.

3. Expand the applicable address block to see all tenants and their meters associated with the address.
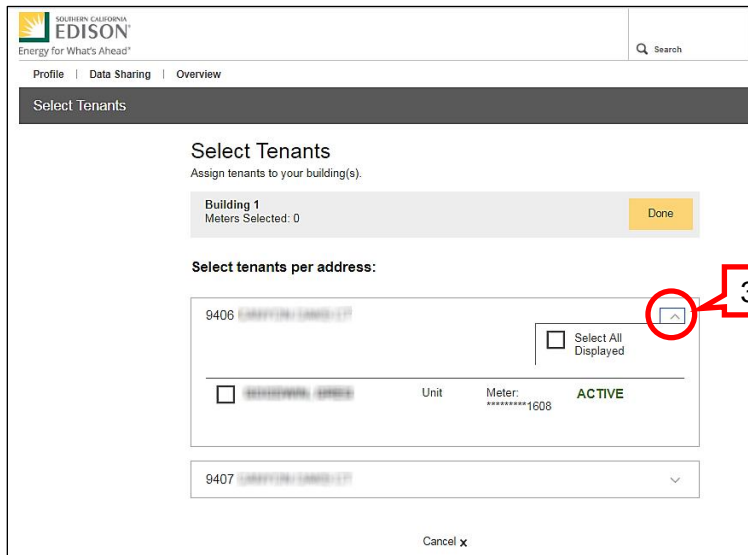
The expanded address displays a list of all building tenants at the address.

4. Check the boxes next to each tenant (Active and Inactive), or check the **Select All Displayed** checkbox if all tenants displayed are associated with the building.

5. Click **Done**.

Step 4: Building Tenant Set-up

> **NOTE**   The example below displays multiple tenants for the address. **Only select the tenants associated with the specific address.**

If there is a long list of tenants associated with the address, click the **Next** link at the bottom to display additional tenants.

If **Select All Displayed** is checked for the first group displayed in a long list, you will need to check it again when displaying each additional group.

The Data Sharing confirmation page displays.

Each building that is registered will receive a unique key. The **Data Sharing Key** enables SCE to transfer the building data to Portfolio Manager. **You access your building energy usage data in Portfolio Manager**.

Step 4: Building Tenant Set-up

6. Click **Return to Dashboard**.

The Dashboard shows that Action is Required – the Data Sharing Key is entered in Portfolio Manager.

NOTE	The Data Sharing Key should be entered into Portfolio Manager as soon as possible. This will ensure that data sharing will begin promptly once the authorization forms are approved.

If the building has three or more commercial tenants or five or more residential tenants, tenant consent is not required to share building electrical data.

Step 4: Building Tenant Set-up

Tenant Authorization Form

Authorization Forms are only necessary when a commercial building has fewer than three (3) tenants, none of whom are residential.

If required, an Authorization Form is provided for each tenant. Each form can be downloaded and given to your tenants to complete and sign.

Submit all completed **Authorization Forms** via email to **3rdparty@sce.com**.

For help filling out and submitting authorization forms, please refer to the **Authorization Form Instructions** posted below the form in the Benchmarking Portal.

The Authorization Form is designed to protect the privacy rights of SCE's customers. Any alterations to the form after it has been executed by a customer will render it null and void.

If tenant consent is required, you will need to complete the following steps.

NOTE	Users logged in with a linked account can skip to step 10.

7. Once tenants are selected and you click the **Done** button, you are prompted to provide a **Customer Account** (CA) number, if you have one. If you click **Yes**, proceed to 8a below. If you click **No**, proceed to 8b on page 27.

8a. Click **Yes** to link your CA Number to the building and enter your **Customer Account Number** and **Billing Zip Code**.

9a. Click **Next**.

Step 4: Building Tenant Set-up

*If you click **No** when prompted to link your Customer Account Number**,** SCE will create a Customer Account Number for you.*

8b.   If **No** is selected, enter your **Title**, **Phone Number**, select the **Type of Phone**, and enter your **Tax ID**.

9b.   Click **Next**.

The Data Sharing Key page displays. Note the "orange" message at the top of the page that indicates that Tenant Authorization is required.

Step 4: Building Tenant Set-up

10. Click **Authorization Form** to download the form.

11. Click the link **Instructions for Authorization Form** to download instructions for the completion of the form.

> **NOTE** Give a copy of the form to each tenant to complete and sign
> .

12. Click **Return to Dashboard** to view the results.

Step 4: Building Tenant Set-up

The Benchmarking Dashboard displays, showing that action is required.

Continue selecting the tenants for each additional building you added to the Property.

Step 5	Create a Portfolio Manager Account

Create and Sign In to Your Portfolio Manager Account

1. Go to **Energy Star® Portfolio Manager** at www.energystar.gov/benchmark.

2. If you are new to Portfolio Manager, click **SIGN UP** to create an Account and proceed to 3 below.

   If you already have a Portfolio Manager account, enter your username and password, click **LOG IN,** and proceed to the next section beginning on page 38.
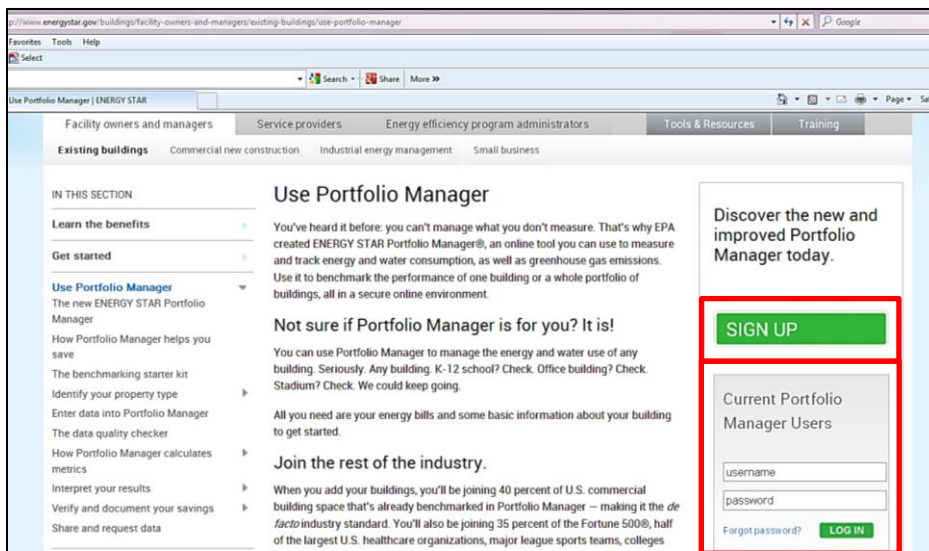
3. **Create Your Account** in Portfolio Manager by entering a username and password.

   NOTE The username cannot be modified, but all other contact information can be updated at any time.
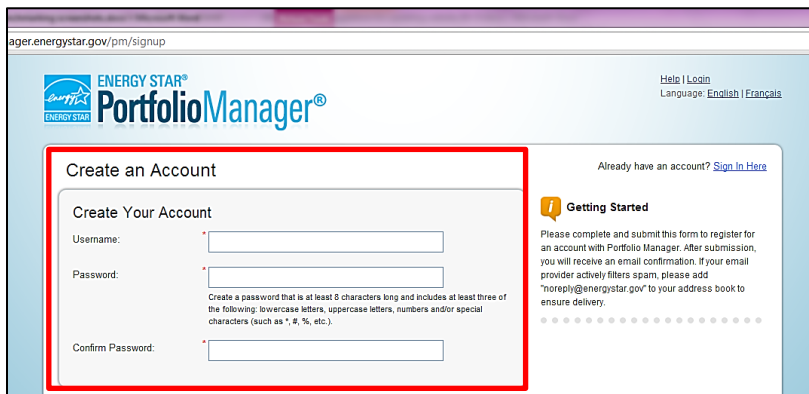
Step 5: Create a Portfolio Manager Account

4. Below the Create an Account block, enter information **About Yourself**, including **First** and **Last Name**, **Job Title**, **Email** address, **Phone** Number, **Street Address**, **City**, **State** and **Postal Code**.

    The fields with an asterisk (*) are required.

5. Below the About Yourself block enter information **About Your Organization** including **Organization Name**, **Primary Business**, or **Service of your Organization**.

> **NOTE** The Organization Name must be at least 3 characters long in order to connect with SCE. There are also several optional characteristics of information you can enter, such as whether your organization is an ENERGY STAR® Partner or whether you would like people to be able to search for you in Portfolio Manager and send you a connection request in order to share building information.

6. In the **Recovering Access to Your Account** block, select two security questions and provide your answers. In the event that you forget your username or password, Portfolio Manager will ask for answers to your security questions.

7. Once you have entered all information on the page, click **Create My Account**.

Step 5: Create a Portfolio Manager Account

You will be directed to the Welcome Page of Portfolio Manager.

8. Enter Your **Username** and **Password,** and click **Sign In**.

| Step 6 | Set Up a Property in Portfolio Manager |

Tip: Navigating within Portfolio Manager is simple using the five tabs (**MyPortfolio**, **Sharing**, **Planning**, **Reporting**, and **Recognition**) to guide you. For example, there are multiple ways to get to the same place. The **MyPortfolio** page automatically loads with a list of properties you set up, two charts that you can customize on the left hand side, and a list of your account's Notifications. These can be requests to share data, updates on ENERGY STAR certification applications, and/or others.

| **MyPortfolio** | Sharing | Planning | Reporting | Recognition |
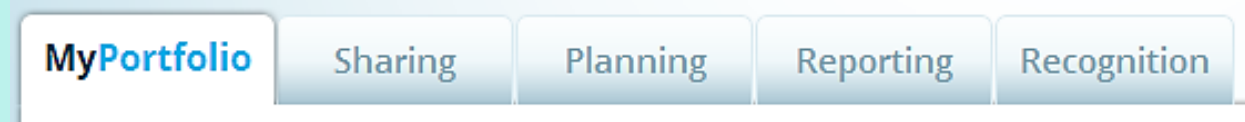
Within the **MyPortfolio** tab, you will see another set of property-level tabs. With these tabs, you can navigate between a summary of the building, property details, and meter data. You can also set and track progress against specific performance goals, and compare a building's current energy performance against the property's baseline and/or initial design.

| Summary | Details | Meters | Goals | Design |
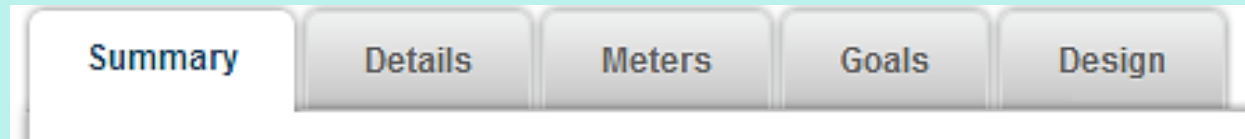
Unlike the registration process on SCE.com, **a Property in Portfolio Manager is a building** with all of its associated characteristics (e.g., gross area square footage, hours of operation, number of employees working the main shift, etc.). If you have multiple buildings to benchmark, you will need to set up a Property for each one in Portfolio Manager. This will enable you to see usage data unique to each one of your buildings.

NOTE When identifying building characteristics, you are prompted to enter additional information based on the details you specify for your building (e.g., parking available, data center, hours of operation each week, etc.).

Step 6: Set Up a Property in Portfolio Manager

Set Up a Building

1. In the top left-hand corner of the **My**Portfolio tab, select **Add a Property**.
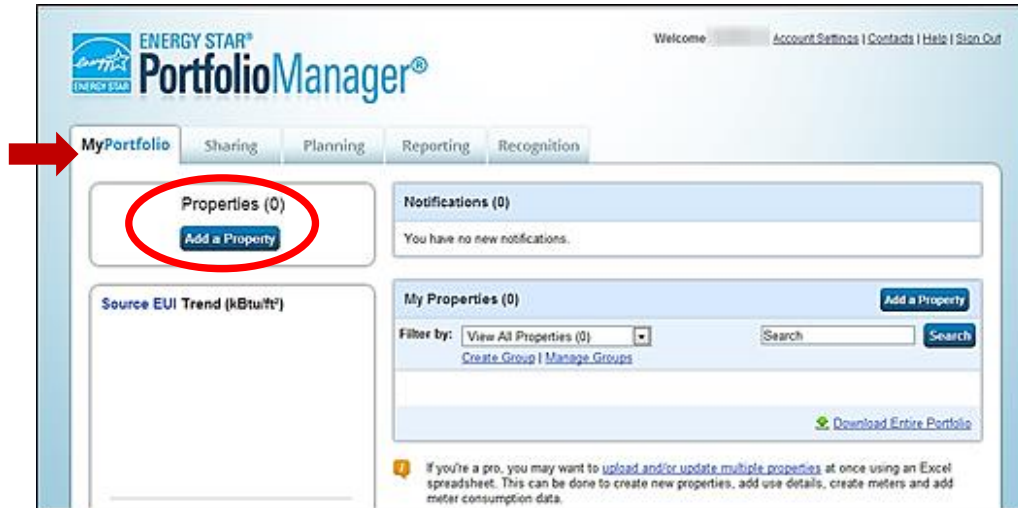
> The **Set up a Property: Let's Get Started!** page displays. On this page, you will designate **Your Property's Primary Function**, **Your Property's Buildings**, and **Your Property's Construction Status**.
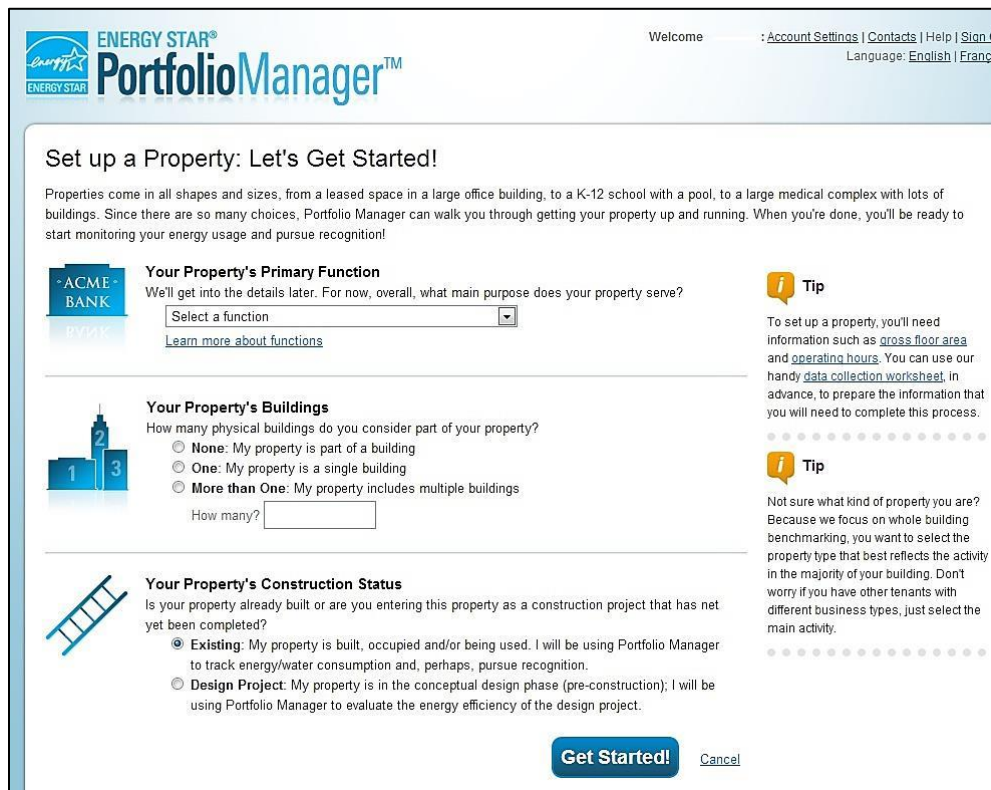
2. In the **Your Property's Primary Function** section, **click** the drop-down menu.

You can choose from more than 85 types, which will allow you to better define your property and improve the analysis when comparing your property to similar properties. Scroll down to see additional choices.

NOTE Some properties include multiple use types, such as restaurants in hotels, salons in senior care communities, and cafeterias in hospitals. As a general rule, if a certain use commonly occurs in the type of property being benchmarked, simply include it in the square footage of the building's primary use. You do not need to add another type of use.

3. Designate the number of physical buildings located on your property. This is important if you plan benchmarking a campus property. Select either

- **None** (your property is part of a building)

- **One** (my property is a single building – this is typically the choice you will make for each building on your property)

Step 6: Set Up a Property in Portfolio Manager

- **More than One** (My property includes multiple buildings) and enter the total number of buildings. **A property with multiple buildings is considered a campus**. You will start by defining the campus as the main property. From there, you can:

  - Add individual buildings.

  - Track performance by updating information at the property and building levels.

  - Meter buildings separately and/or roll meters up to the property level.

> **NOTE** For properties with multiple buildings, only hotel, hospital, K-12 school, multifamily housing or senior care communities are eligible to receive a 1-100 ENERGY STAR score at the campus level.

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? [   ]

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.

4. Select the **Your Property's Construction Status**:

- **Existing**

- **Design Project**

- **Test Property**

Most properties will be **Existing,** but Portfolio Manager enables users to enter in projects that are still in the Design stage in order to assess the anticipated, as-designed energy use. Once your project is built, you can use Portfolio Manager to compare designed energy use against actual, in-operation energy use.

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.

[Get Started!] Cancel

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.

Step 6: Set Up a Property in Portfolio Manager

5. Click **Get Started!**

*The **Set Up a Property Basic Information** page displays.*

Step 6: Set Up a Property in Portfolio Manager

6. In the **About Your Property** block, enter basic property information including **Street Address**, **Year Built**, **Gross Floor Area** and **Occupancy** percentage.

7. In the **Do Any of These Apply?** block, check the boxes next to the statements that apply to your property, such as whether your property's energy consumption includes parking. You will be prompted to provide further information about your building(s) use, based on typical functions found at the primary property type you selected. This allows the tool to determine the additional information that may be needed.

8. Click **Continue**.

*The **Set up a Property: How it is Used** page displays. The **Basic Information** block displays building details entered thus far.*

Set up a Property: How is it used?

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

Basic Information

Name:	XYZ Bldg R	**Country:**	US
Property Type:	Medical Office	**Address:**	123 Any Street
Year Built:	1980		Ventura, CA 93004
Property consists of:	1 building with parking		Map It

Edit

Add Another Type of Use [▼] Add

9. In the **Building Use** block, enter building information in the fields provided under **Property Use Detail**.

▼ **Building Use**   ✎ Edit Name

Medical Office refers to buildings used to provide diagnosis and treatment for medical, dental, or psychiatric outpatient care.

Gross Floor Area should include all space within the building(s) including offices, exam rooms, laboratories, lobbies, atriums, conference rooms and auditoriums, employee break rooms and kitchens, rest rooms, elevator shafts, stairways, mechanical rooms, and storage areas. If you have restaurants, retail (pharmacy), or services (dry cleaners) within the Medical Office, you should most likely include this square footage and energy in the Medical 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	* 25,000	Sq. Ft. ▼	1/1/2017 📅	☐
Surgery Center Floor Area		Sq. Ft. ▼	1/1/2017 📅	☐
⭐ Weekly Operating Hours	40	☐ Use a default	1/1/2017 📅	☐
⭐ Number of Workers on Main Shift	10	☐ Use a default	1/1/2017 📅	☐
Number of Surgical Operating Beds			1/1/2017 📅	☐
Number of MRI Machines			1/1/2017 📅	☐
⭐ Percent That Can Be Heated	All of it - 100% ▼	☐ Use a default	1/1/2017 📅	☐
⭐ Percent That Can Be Cooled	All of it - 100% ▼	☐ Use a default	1/1/2017 ✕ 📅	☐

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

Provide details on your primary building use, as well as details on additional property uses. You can use default or a **Temporary Value** if you don't have all the information needed. Just remember to update this with actual information once you have it.

Step 6: Set Up a Property in Portfolio Manager

10. Complete each additional block on the page.

    Depending on the boxes selected describing how the building is used on the previous property set up page, additional blocks display that need to be completed (e.g., Vacant Space, Overtime Tenant, etc.). Scroll down the page to see all blocks that need to be completed.

11. When you have entered all of the property information, click **Add Property**.

    A dialog box displays that warns you to enter all property details, unless you want Portfolio Manager to calculate default values on your behalf, based on gross floor area.

12. Click **Continue** to have Portfolio Manager calculate usage based on default values or **Cancel** to provide your own values to required fields.

    *If you click **Continue**, you are returned to the **MyPortfolio** tab. If you click **Cancel**, you are returned to the **Set up a Property: How it is Used** window so that you can continue to enter required values.*

13. Click the **Details** tab to see a summary of the property information.

Step 6: Set Up a Property in Portfolio Manager

NOTE Portfolio Manager is able to provide significant guidance as you work through setting up a property using prompts and alerts. As you pass your mouse over each property use characteristic, the precise definition for that characteristic displays to ensure that you are entering the most accurate information. There are hundreds of tips, definitions, and mouse-overs that can be found throughout the tool. Each is there to assist you to accurately benchmark any type of property.

As needed, you can change the Name of Building and Property Use by clicking **Edit Name**.

If you have additional spaces or property types, you can go to the drop down menu under **Add Additional Type of Use** and designate another space or property type. Note, if you add additional property types or spaces, ensure that the square footage of your building is correct; Portfolio Manager initially auto-fills the square footage of your entire building under the primary designation.

Tip: Designate separate spaces within the property if the operating hours are significantly different. For example:

- *Overtime office (or some other name, as appropriate):* This is where you would break out any office space that has significantly different (>10%) weekly operating hours from the general office space. If you have two or more tenants, each of which have significantly different run times from each other and from the rest of the building, you could enter more than one entry for this category.

- *Vacant space*: Even if there is no vacant space at present, if it is a multi-tenant building and vacancies are a possibility, it is recommended to designate vacant space, even if it is currently set at 0 square feet. The number of people, computers, and operating hours should all be set at 0 for vacant space, although usually the space is heated and cooled in a manner consistent with the rest of the building.

Step	7	**Share Data**

The steps below enable energy usage data to flow from SCE to Portfolio Manager.

1. On the **My**Portfolio tab, click the **Contacts** link in the top right corner of the page.

2. In the next window click **Add Contact**.

*The **Add Contact** window displays.*

3.   Enter **Southern California Edison** in the **Name** field.

4.   Click **Search**.

*The **Southern California Edison's Automated Data Exchange Service** displays.*

5.   Click **Connect**.

*The **Send a Connection Request to Southern California Edison** page displays.*

Step 7: Share Data

6. Read SCE's **Terms of Use**.

7. Check the box at the bottom of the window to indicate that you have read and agree to SCE's **Terms of Use**.

8. Click **Send Connection Request**.

*Southern California Edison processes connection requests every two hours. As soon as you submit your request, you will see a notification that it has been submitted on the **My**Portfolio tab.*

Step 7: Share Data

*Once your request is approved, you will see a notification on the **My**Portfolio tab that you are connected to Southern California Edison.*
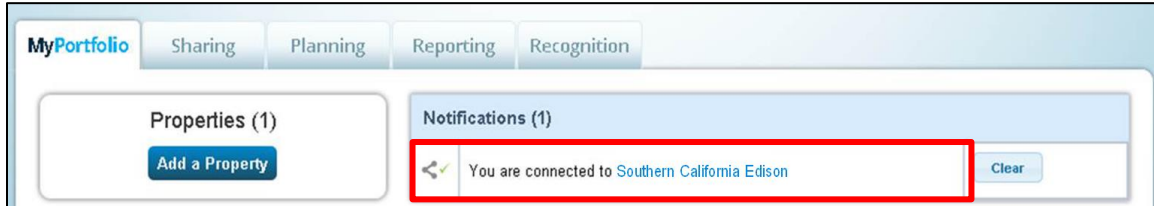
Share Your Building

1. Click on the **Sharing** tab.

   *The **Sharing** page displays.*

2. Click **Share (or Edit Access to) a Property**.
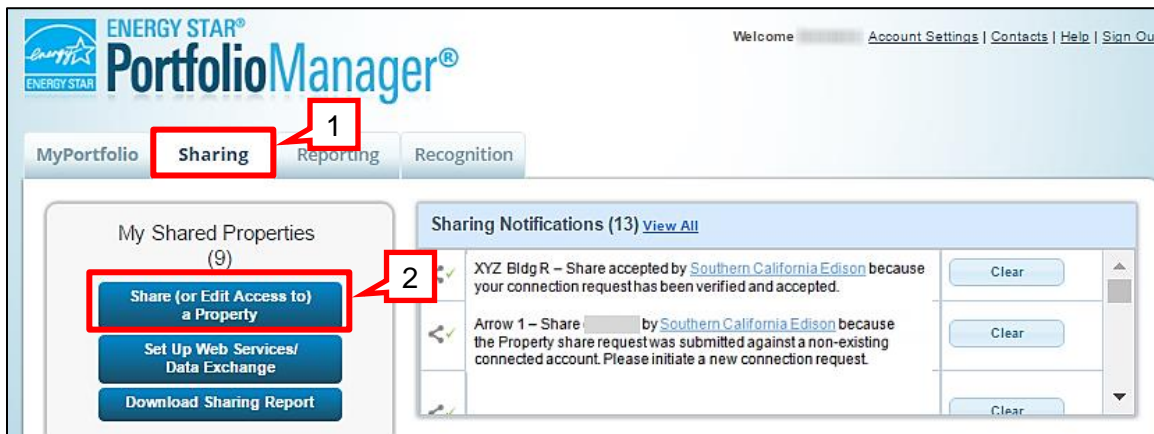
*The **Share or Edit Access** page displays.*

Step 7: Share Data

3. Select the number of properties.

4. Select the **Property Name**.

5. Select the **Account** to share with.

6. For **Choose Permissions,** click the radio button next to **Personalized Sharing & Exchange Data ("Custom Orders")**.

7. Click **Continue**.

The Share Your Properties page displays.

8. In the table row that identifies **Southern California Edison**, click the radio button in the **Exchange Data** column.

9. Click **Share Property(ies)**.

Step 7: Share Data
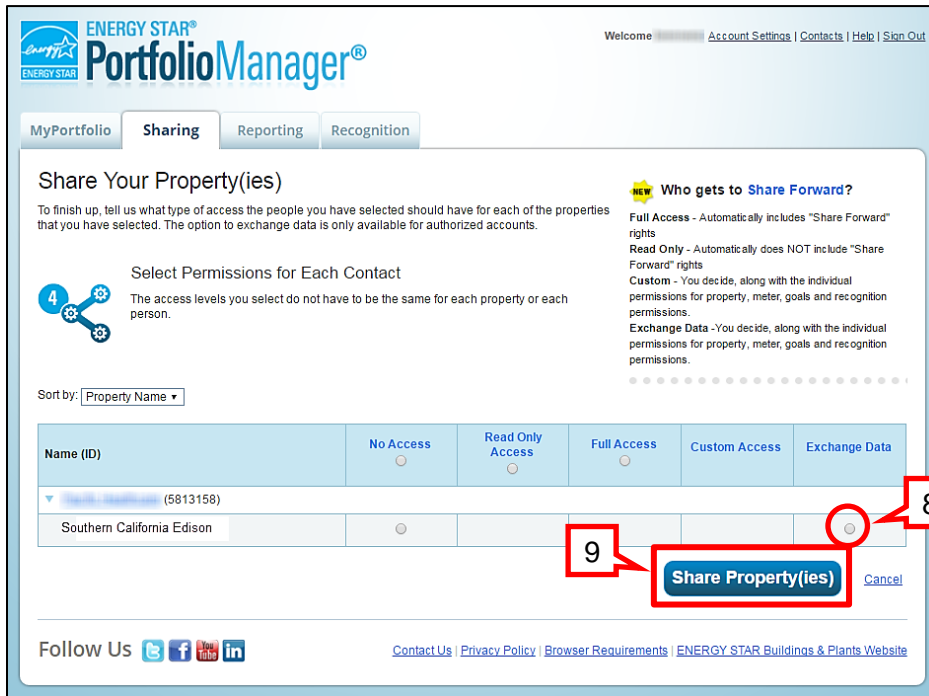
*A dialog box displays where you can enter your **Data Sharing Key** obtained when you registered your building with SCE and designate the level of access to give.*

10. Enter the **Data Sharing Key**.

11. Click the **Full Access** radio button.

12. Click the level of access to give SCE for **Goals, Improvements, & Checklists** and **Recognition**.

13. Scroll down.
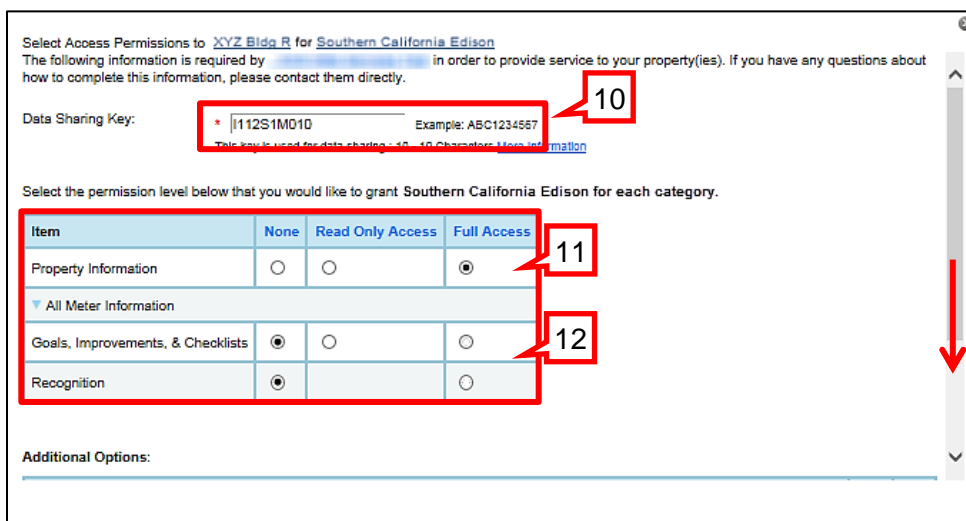
14. Under **Additional Options – Share Forward**, click the **No** radio button.

15. Click **Apply Selections & Authorize Exchange**.

*You are returned to the **Share Your Property(ies)** page.*

16. Click **Share Property(ies)**.

You are returned to the main page on the Sharing tab.

Once data sharing has been successfully established with SCE, you will be able to access benchmarking data for your property on Portfolio Manager within one to five business days.

NOTE   If tenant consent(s) is required, it may delay when shared data is available for viewing in Portfolio Manager.

It is easy for you to see trends and to track improvement for a property or your entire portfolio of buildings with a variety of standard graphs and reports in Portfolio Manager.

Step 8

View Results and Track Progress

Once sharing of energy usage data is established with SCE and your Portfolio Manager account, you can access benchmarking results for your property.

Portfolio Manager makes it easy for you to see trends and to track improvement for a property or an entire portfolio of buildings with a variety of standard graphs and reports. The website provides links to additional training information, including monthly classes at: https://www.energystar.gov/buildings/training/training.