
Uploading Template Data to ENERGY STAR™

Building Portfolio Manager

This template serves as a resource to aid local governments in developing and implementing an Energy Management Program or plan. Tracking electric consumption by facility is an important early action to establish baseline information and begin a common collection point for utility data. Keeping this 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, or behavior changes occurring in facilities.

Environmental Protection Agency's (EPA) ENERGY STAR Building Portfolio Manager is a free, online tool where local governments can measure and track energy and water consumption, as well as greenhouse gas emissions. Building Portfolio Manager can be used to benchmark the performance of one building or an entire portfolio of buildings, all in a secure online environment.

The attached example utility data input template allows users to track their utility data over a longer term and upload into the Building Portfolio Manager all together, versus the need to log-in and input their data each month.

Local governments may modify this resource to accommodate their individual needs including availability of utility data for their buildings and facilities, desire to track specific utilities (electric, gas, water, waste, etc.), or evaluation of ENERGY STAR certification for buildings, etc.

Step-by-Step Instructions on how to use this template can be found on the reverse side of this sheet.

The example template can be downloaded here: <http://bit.ly/2Yev2qN>.

Additional ENERGY STAR Resources:

- [ENERGY STAR Building Portfolio Manager](#)
- [ENERGY STAR for State and Local Governments](#)

Using ENERGY STAR™ Building Portfolio Manager Excel Templates

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

To view an example template, visit:
<http://bit.ly/2Yev2qN>

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.