Energy Efficiency Planning for Rural Communities (EEPRC)

Technical Assistance Program

Energy Star Portfolio Manager Trainings

GOVERNOR'S OFFICE OF
Policy Innovation
and the Future

Late Sept. – Early Oct. 2025

Maine EEPRC

ENERGY STAR PORTFOLIO MANAGER TRAINING SESSION 2: SHARING, ACCESS, AND REPORTS

THURSDAY, OCT. 2ND 2025

PRESENTED BY PowerOptions

MADE POSSIBLE BY GOVERNOR'S OFFICE OF Policy Innovation and the Future

ENERGY STAR® Portfolio Manager®

PROGRAM TEAM ORGANIZATIONS

1

Maine GOPIF, State Team

Based in Augusta, ME

2

PowerOptions, Consultant Team

Based in Boston, MA

3

RBG, Energy Auditor Team

Based in Concord, NH

GOVERNOR'S OFFICE OF
Policy Innovation
and the Future

State Team

Casey Zorn
Lead by Example Project Coordinator

Primary point of contact for Maine GOPIF

Ashley Krulik
Community Resilience Partnership Program Manager

PowerOptions

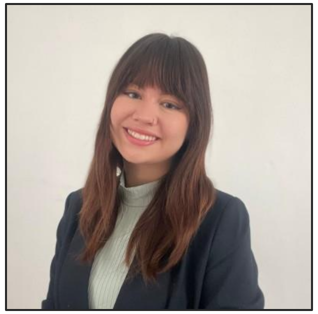
Consultant Team

Claire Kokoska
Project Manager, Energy Sustainability, and Analytics

Primary point of contact for program logistics and questions.

Erin Camp, PhD
Program Director, Energy Sustainability, and Analytics

Senior Advisor



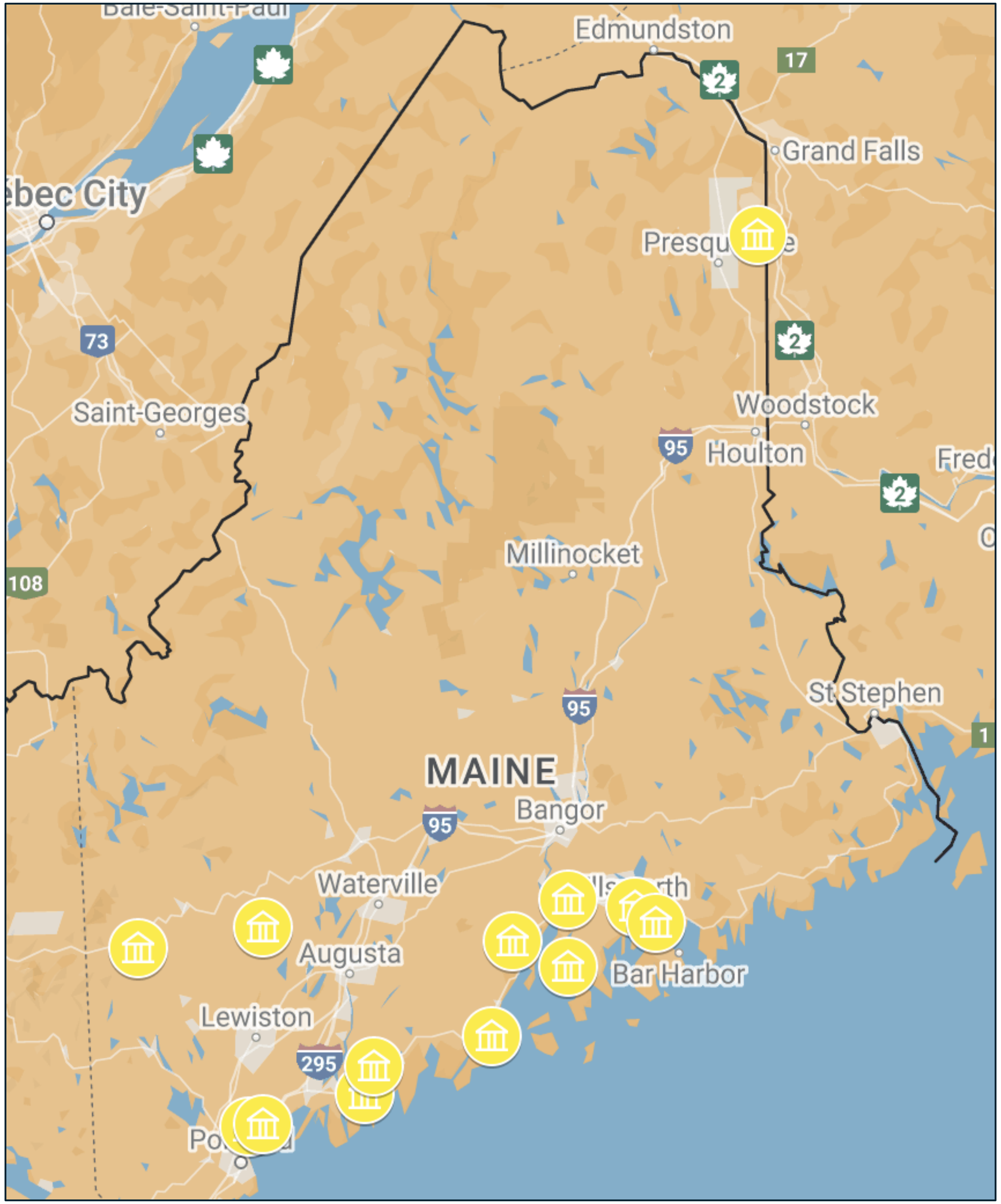
Erin Camp, PhD
Junior Energy Analyst, Energy Sustainability, and Analytics

Portfolio Manager Advisor

PARTICIPATING COMMUNITIES

in alphabetical order

1. Arrowsic
2. Belfast
3. Bethel
4. Brooksville
5. Cumberland
6. Ellsworth
7. Fort Fairfield
8. Lamoine
9. Livermore Falls
10. Orland
11. Rockland
12. Westport Island
13. Wiscasset
14. Yarmouth



Maine EEPRC
PROGRAM TIMELINE

Program Stage	When?	Apr. 2025	May. 2025	Jun. 2025	Jul. 2025	Aug. 2025	Sep. 2025	Oct. 2025	Nov. 2025	Dec. 2025	Jan. 2026	Feb. 2026	Mar. 2026	Apr. 2026	May. 2026	Jun. 2026	Jul. 2026	Aug. 2026	Sep. 2026
0. Kick Off & Orientation Introduction to program and program teams.	Apr. 2025																		
1. Building Energy Audits For two (2) buildings in each community.	Apr. 2025 to May 2026																		
2. Energy Star Portfolio Manager Trainings Three (3) total, held virtually.	Sept. 2025 to Nov. 2025																		
3. Energy Conservation Plans Develop a plan for each community.	Apr. 2025 to Jul. 2026																		

RECAP: AGENDA (Session I: Sept. 25th)

1. **Benchmarking Your Buildings**
2. **Understanding Energy Bills**
3. **Portfolio Manager: Getting Started**
4. **Portfolio Manager: Energy Benchmarking In Practice**

COMMUNITY LIAISON TAKE-AWAY TASK (from 9.25.25):

1. Create an Account for Your Community
2. Create an Account for Yourself
3. Add Your Community's Maine EEPRC Buildings to Portfolio Manager

TODAY'S AGENDA (Session II: Oct. 2nd)

SHARING, DASHBOARDS, AND REPORTS

1. **Connections, Sharing & Access**
    - Connection Types, Access Permissions
2. **Multi-Building Dashboard**
    - MyPortfolio Dashboard
3. **Single Property Dashboards**
    - Tabs for Summary, Details, Energy, Water, Emissions Goals
4. **Reports**
5. **Templates as Tools**
    - Various Templates in Portfolio Manager

1. CONNECTIONS, SHARING & ACCESS

CONNECTION TYPES

- **"Contacts"** (i.e. individuals, community liaisons, staff members, elected officials, etc.)
- **"Organizations"** (i.e. Communities, GOPIF, regional planning organizations, state agencies, engineering or architectural firms, etc.)

SHARING PROPERTY DATA

To share Properties and related data, you MUST add Contacts/Organizations first.

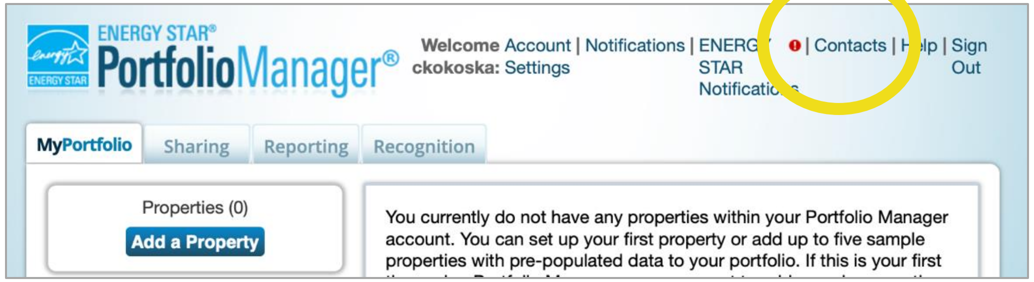
ACCESS PERMISSION TYPES

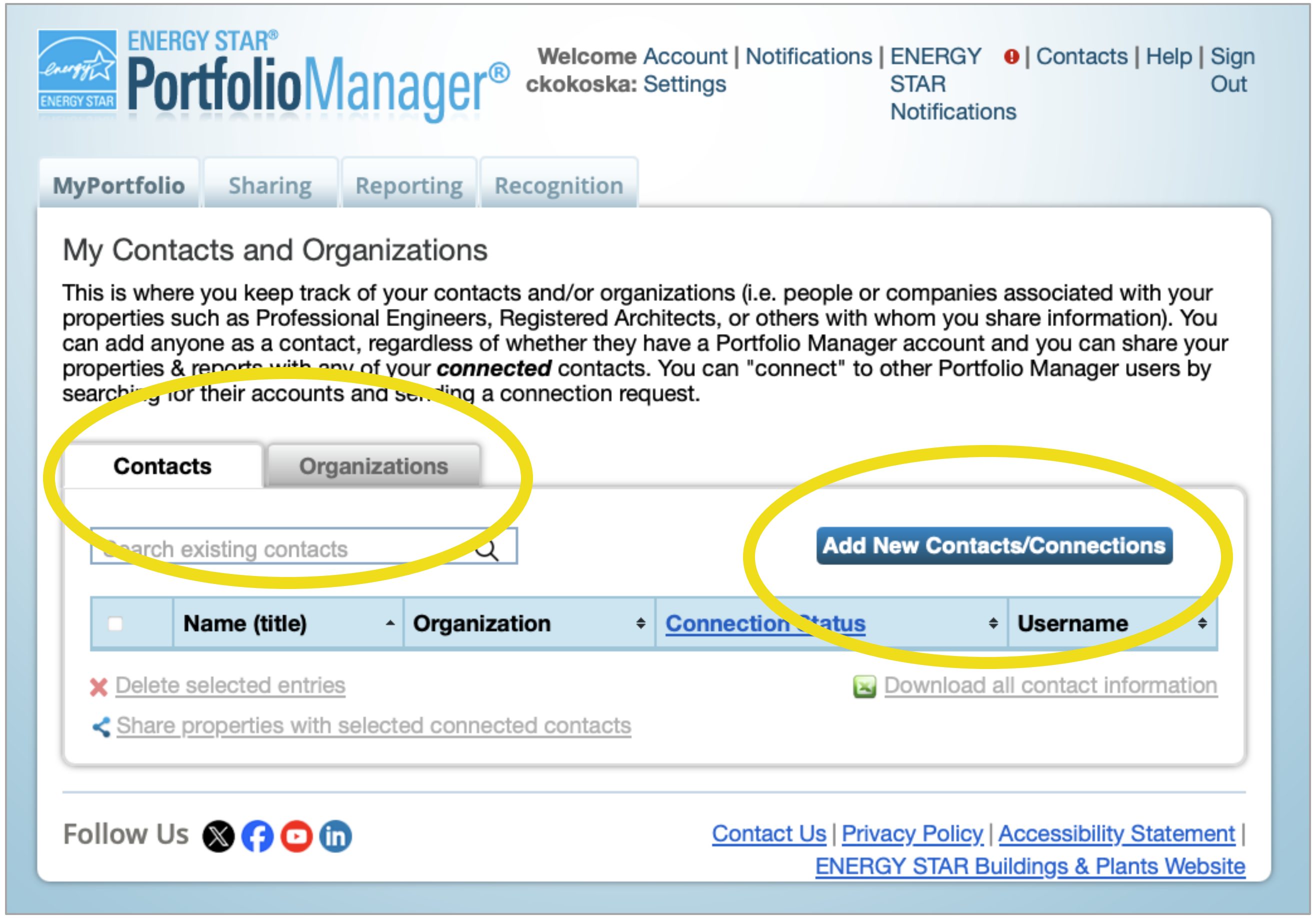
A. **Read Only:** Share read-only access for property data, without allowing the other account to edit data.
B. **Full Access:** Share with full viewing and editing access for property data.
C. **Custom Access:** Share read-only or full access for distinct property data (properties, meters, goals).
D. **Exchange Data:** Share property with an organization that exchanges data with Portfolio Manager through web services.

1. CONNECTIONS, SHARING & ACCESS

CONNECTIONS PAGE

1. From homepage, click **"Contacts"** in upper right.
2. You will see your **"My Contacts and Organizations"** page.
   a. Add Connections (Contacts or Organizations)
   b. View / Edit / Share / Download existing Connections.



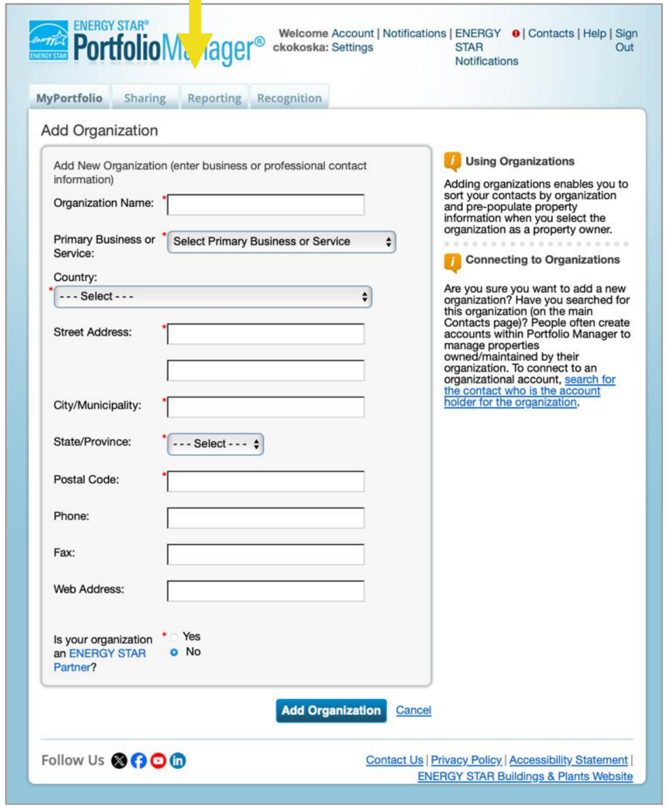


1. CONNECTIONS, SHARING & ACCESS

ADDING CONNECTIONS (ORG. VS. CONTACT)

Organization (i.e. Community)

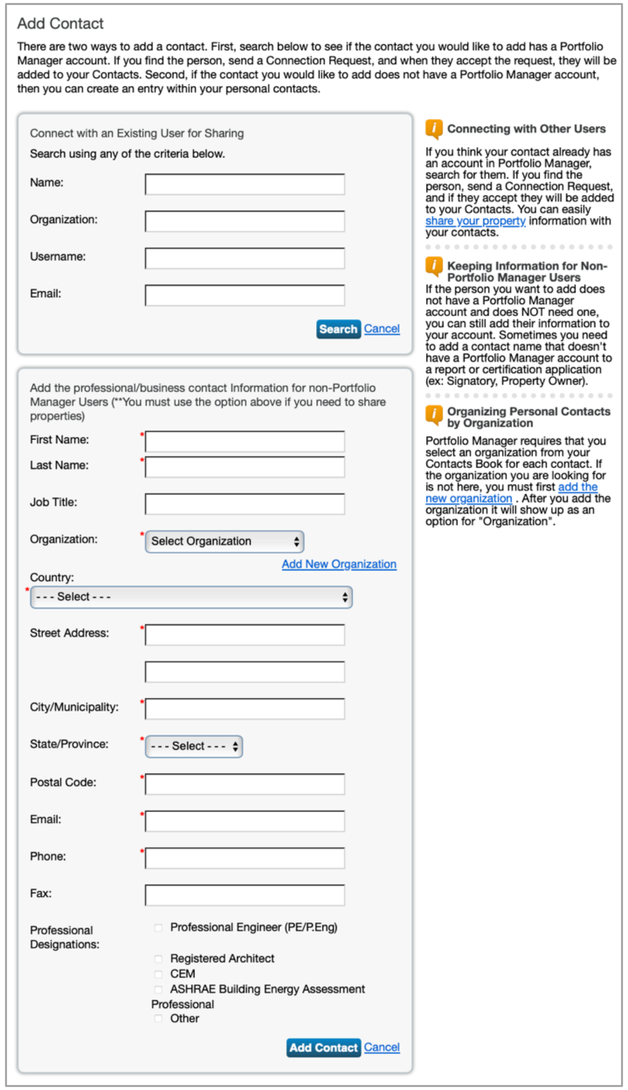
a. Add "Organization Name"
b. Primary Service (public services or education category)
c. Location & Address
d. Is your organization an Energy Star Partner (likely, "no").



Contact (i.e. Individual)

a. Search For Existing Contact
   - Add Contact's Name
   - Add Contact's Organization
   - Add Contact's Username
   - Add Contact's Email
   - Click "**Search**"

b. Add New Contact
   - Add Contact's Name
   - Add Contact's Organization
   - Add Contact's Address
   - Add Contact's Email
   - Add Contact's Phone
   - Click "**Add Contact**"



2. MULTI-BUILDING DASHBOARDS
MYPORTFOLIO

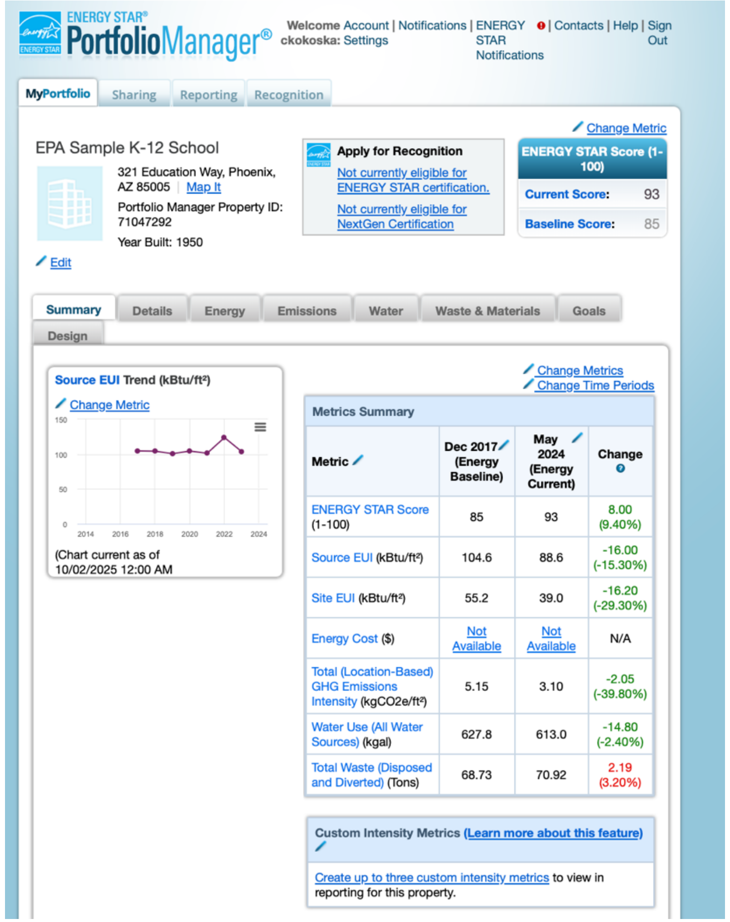
KEY USES

- **Manage Your Buildings:** Add, edit, or delete properties.
- **View Overall Performance:** Access reports and charts to see trends in energy and water performance across all your properties.
- **Create Reports:** Use standard report fields / templates to analyze building performance.
- **Set Up Properties:** Set up and enter building information (manually or via spreadsheet uploads).
- **See Portfolio Diagrams:** For campuses with multiple buildings, you can view a diagram to understand how "Child" properties relate to the "Parent" property and their shared metering.

NOTE: We will cover reports and property information uploads later in this presentation.

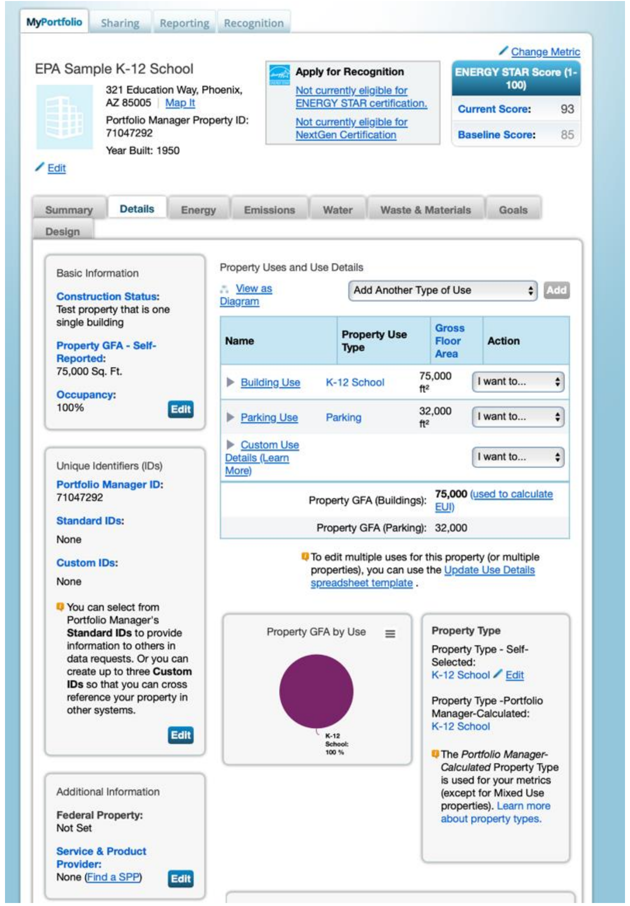
3. SINGLE PROPERTY DASHBOARDS
SUMMARY

- **CUSTOMIZABLE METRIC CHART**
  - Decide which metrics you want to view over time for a single property.
- **METRICS TABLE COMPARING CURRENT TO BASELINE**
- **DATA QUALITY CHECKER (DQC)**
- **CONTACTS WITH ACCESS TO THE PROPERTY**
- **DOWNLOAD PROPERTY DATA TO EXCEL**



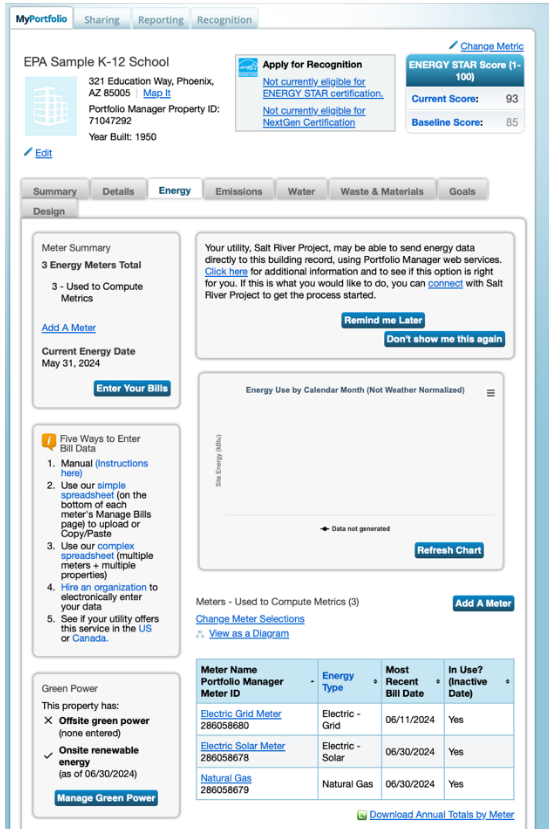
3. SINGLE PROPERTY DASHBOARDS *DETAILS*

- **VIEW & EDIT KEY BUILDING INFORMATION**
  - Occupancy %
  - Building Use
  - Gross floor area (gross square footage)
  - Weekly Operating Hours
  - % that can be heated / cooled
  - Property Type, Address & Key Building Details
  - Property Notes (if there is key building information you wish to document)



3. SINGLE PROPERTY DASHBOARDS
ENERGY

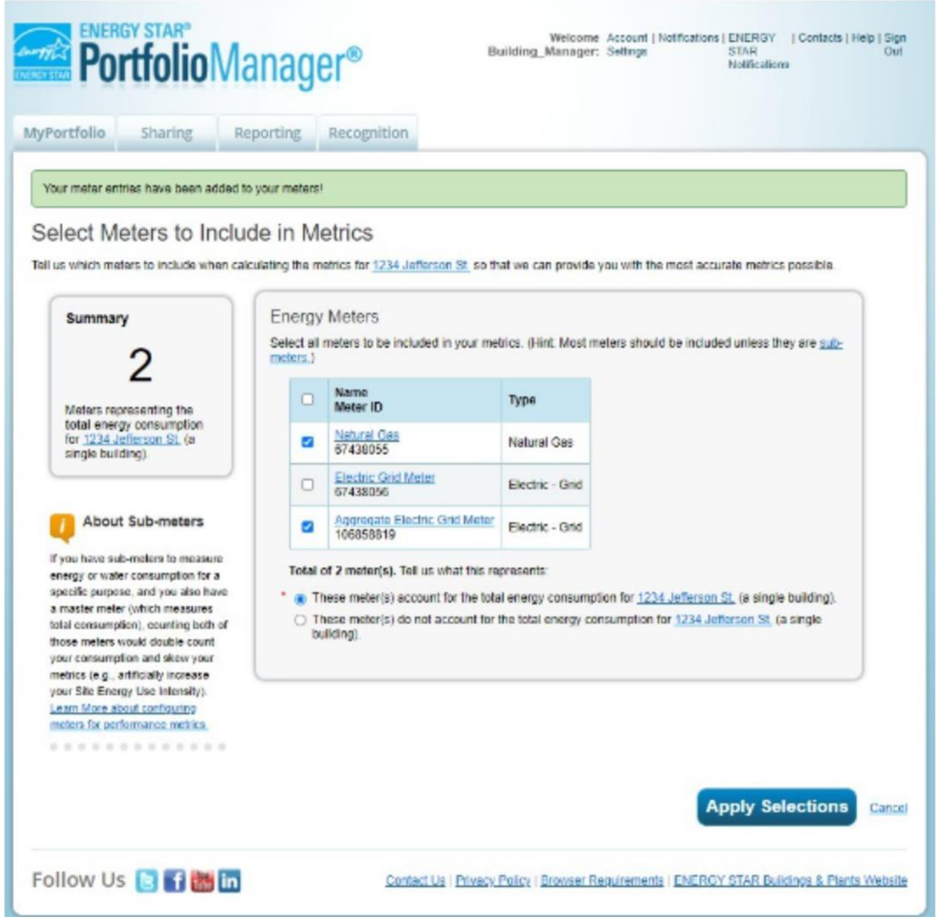
- **ENERGY METER SUMMARY**
  - Building Energy Meters List
  - “**Add a Meter**” Button
  - “**Enter Your Bills**” Button
- **ENERGY USE BY CALENDAR MONTH CHART (ALL ENERGY TYPES)**
  - Export Data by Calendar Month
- **ENERGY METERS TABLE**
  - Download Annual Totals by Meter
  - NOTE: You may customize which meters are included in Energy Star metrics analysis and reports.



3. SINGLE PROPERTY DASHBOARDS
ENERGY - METERS INCLUDED IN METRICS

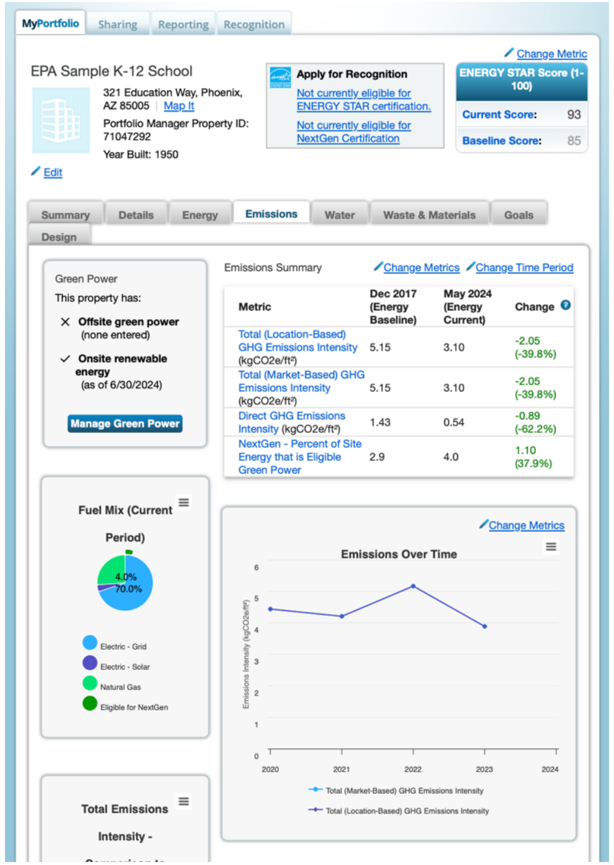
INCLUDING OR EXCLUDING UTILITY BILL CATEGORIES FROM METRICS

1. Click the **Energy** tab.
2. Click **“Change Meters Selected.”**
3. Click **“About Your Meters.”**
4. Click “**Continue.**”
5. The “**Select Meters to Include in Metrics”** page will display.
    a. Select the new energy meter you created and check the “These meter(s) account for the total energy consumption…” box.
    b. Uncheck the box next to any pre-existing partial energy meters so that they are not used to compute metrics.
    c. Click the **Apply Selections** button.



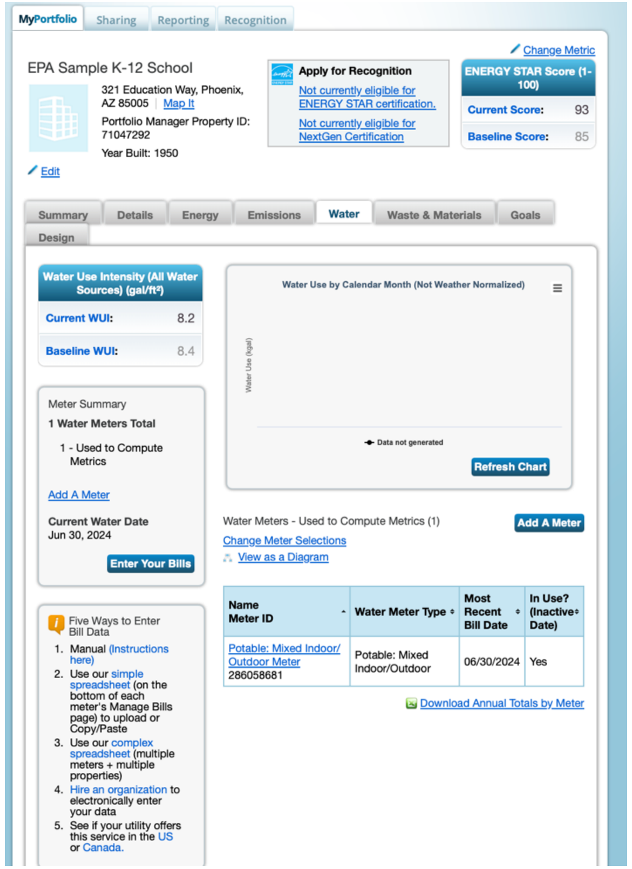
3. SINGLE PROPERTY DASHBOARDS
EMISSIONS

- **GREEN POWER (RECS & ONSITE RENEWABLES, IF APPLICABLE)**
- **EMISSIONS SUMMARY**
  - **Total (Location-Based) Emissions Intensity:** Emissions from a building's utility-supplied energy (i.e. electricity).
  - **Direct GHG Emissions Intensity:** Emissions from the on-site use of fossil fuels (like natural gas or propane) or bio-fuels (like wood) in a building.
- **FUEL MIX (CURRENT PERIOD)**
  - % of various energy types (e.g. natural gas, electricity, etc.)
- **EMISSIONS OVER TIME**
- **TOTAL EMISSIONS INTENSITY VS. NATIONAL MEDIAN**



3. SINGLE PROPERTY DASHBOARDS
WATER

- **WATER USE INTENSITY (WUI)**
- **WATER METERS LIST**
  - "**Add a Meter**" Button.
  - "**Enter Your Bills**" Button.
- **WATER USE BY CALENDAR MONTH CHART**
  - Export Data by Calendar Month.
- **WATER METERS TABLE**
  - Download Annual Totals by Meter.
  - NOTE: You may customize which meters are included in Energy Star metrics analysis and reports.



3. SINGLE PROPERTY DASHBOARDS
GOALS

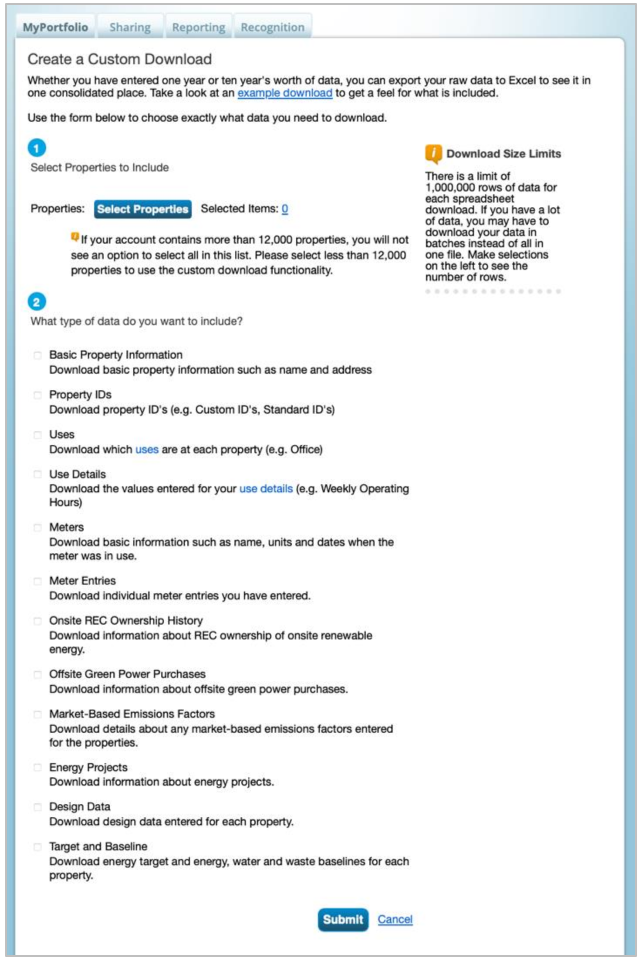
- **ENERGY PERFORMANCE CHART**
- **METRICS CHART**
- **GENERATE & DOWNLOAD PROPERTY PERFORMANCE DOCUMENT PDFS**
- **KEY VALUE**
  - Identify Buildings that are underperforming against set goals.
  - Identify Buildings for decarbonization prioritization based on which are most inefficient or furthest from gals.

- **BASELINES FOR EACH UTILITY CATEGORY**
  - Set baseline energy performance to “benchmark” your buildings.
- **GOALS FOR EACH UTILITY CATEGORY**
  - Set target EUI.
  - Set target % Improvement compared to Baseline.
  - Set target GHG emissions.
  - Set target Energy Costs.

4. REPORTS

IMPORTANCE OF REPORTS IN PORTFOLIO MANAGER

- Portfolio Reports allow you to generate reports based on standardized or custom templates.
- You can pull reports for specific properties, utility categories, metrics, meters, timeframes, etc.
- These reports will be useful to you all going forward for tracking progress against energy performance goals.



5. TEMPLATES AS TOOLS

TEMPLATE TYPES

1. **CUSTOM REPORT TEMPLATES:** define a specific organization of metrics, time periods, and properties for your own reporting needs and in-depth analysis
   a. Navigate to the "Reporting" tab.
   b. Click "Create a New Template". You will name the template, choose a timeframe, and select the specific properties and metrics you want to include in your report.
   c. These templates appear in the "Templates & Reports" section and can be used to generate and share custom reports or to request specific data points from other user

2. **DATA REQUEST TEMPLATES:** The system generates a unique URL to share with respondents, providing instructions and a point of contact. Responses are downloaded as Excel files for analysis.
   a. Go to the "Reporting" tab.
   b. Create a new template and define the time period, location, and metrics you want to collect

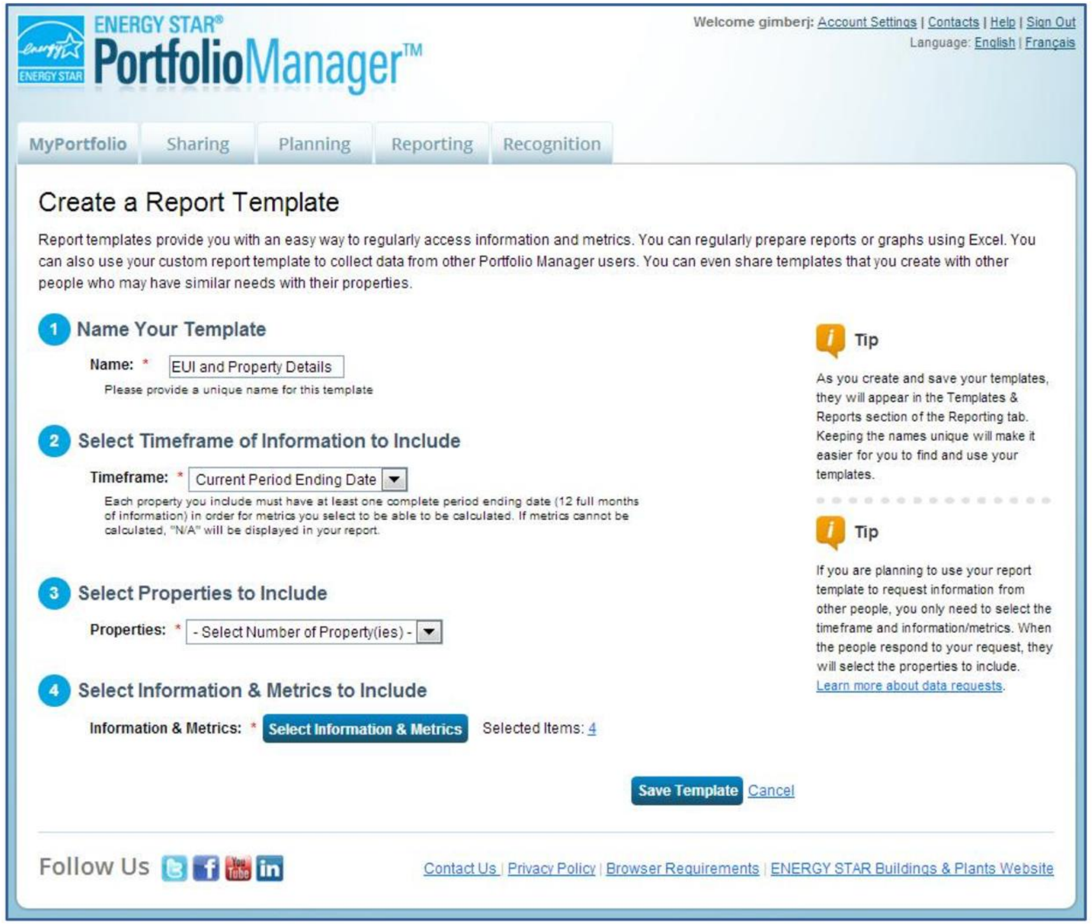
3. **DATA UPLOAD TEMPLATES:** create a template to update property use details.
   a. Go to "Upload and/or update multiple properties”
   b. Clicking "Create an Upload Template"

5. TEMPLATES AS TOOLS

CREATE & SAVE CUSTOM REPORT TEMPLATES

1. Click the **Reporting** tab.
2. Click **"Create New Template"**
3. Enter a Name for the Report.
4. Select the desired Timeframe.
5. Select which Properties / Buildings you would like to include.
6. Click "Select Information and Metrics" and click "Apply Selection" when done.
7. Click **"Save Template"** (this will now be accessible in your **Reports** tab)

IMPORTANT: If a selected property does not have information for the given time frame, this will skew your report figures.



AGENDA (Training Session III: Oct. 9th)

PORTFOLIO MANAGER MAINTENANCE & TROUBLESHOOTING

1. Portfolio Manager Data Maintenance – Best Practices
2. Setting Energy Targets
3. Common Error Messages
4. Troubleshooting
5. Closing

COMMUNITY LIAISON TAKE-AWAY TASK

1. Add your Community account as a connection with your individual account.
2. Share property data from your Community’s account with your personal individual account.
3. Create a Custom Report for one or two of your buildings.
4. Attend Office Hours (optional)
   - *Thurs. Oct. 16th 2025 at 12-1:00pm*
   - *Thurs. Oct. 23rd 2025 at 12-1:00pm*
   - *TBD*

THANK YOU!

We welcome your questions.

You may also contact the Program Team at MaineEEPRC@poweroptions.org