

***Energy Efficiency
Planning for Rural
Communities (EETPRC)
Technical Assistance Program***

***Energy Star Portfolio
Manager Trainings***



Maine EEPRC

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

THURSDAY, OCT. 2ND 2025

PRESENTED BY



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GOVERNOR'S OFFICE OF
Policy Innovation
and the Future



PROGRAM TEAM ORGANIZATIONS

1



GOVERNOR'S OFFICE OF
Policy Innovation
and the Future

Maine GOPIF, State Team

Based in Augusta, ME

2



PowerOptions

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*



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



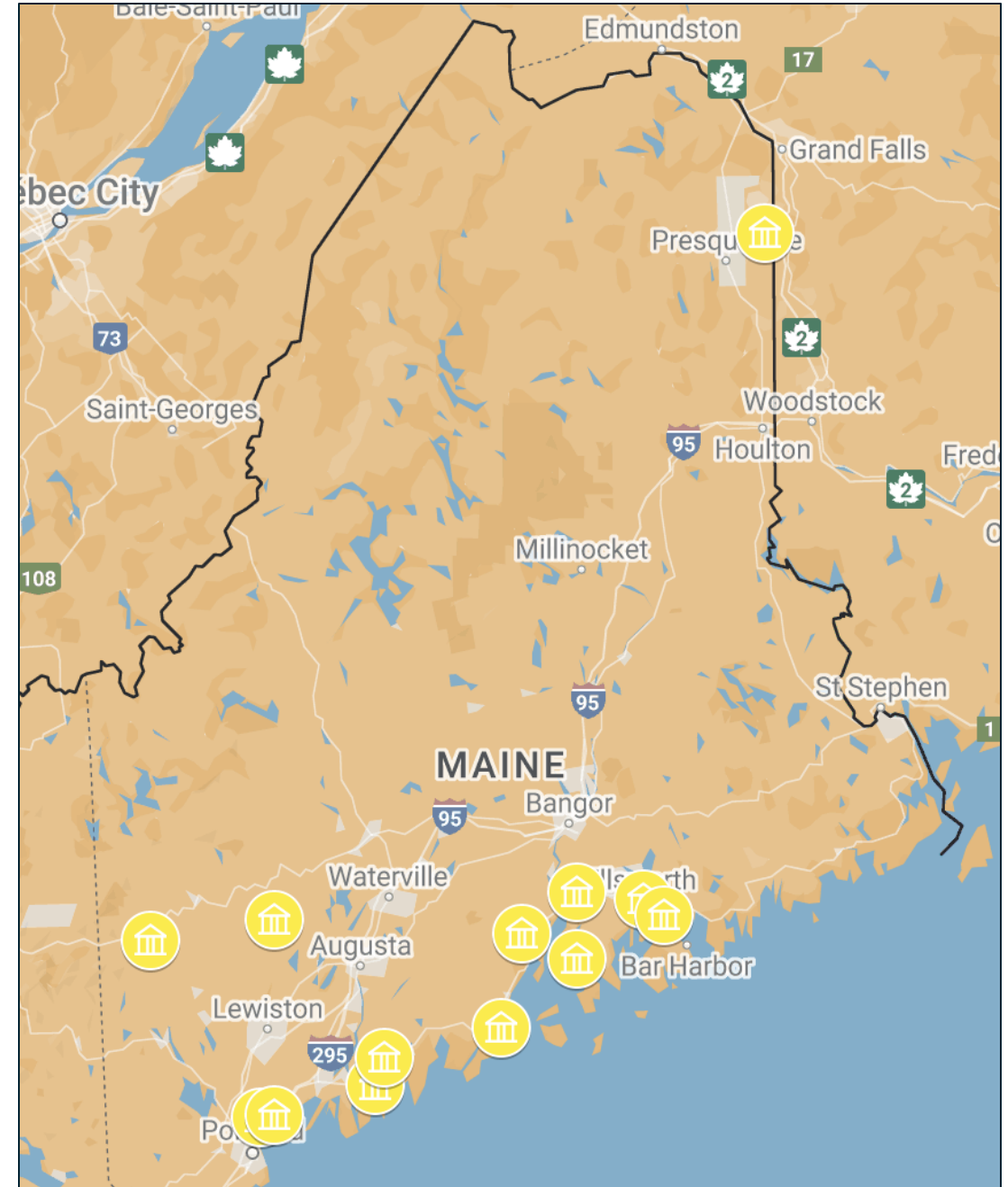
Erin Camp, PhD
*Junior Energy Analyst, Energy
Sustainability, and Analytics*

Portfolio Manager Advisor

PARTICIPATING COMMUNITIES

in alphabetical order

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

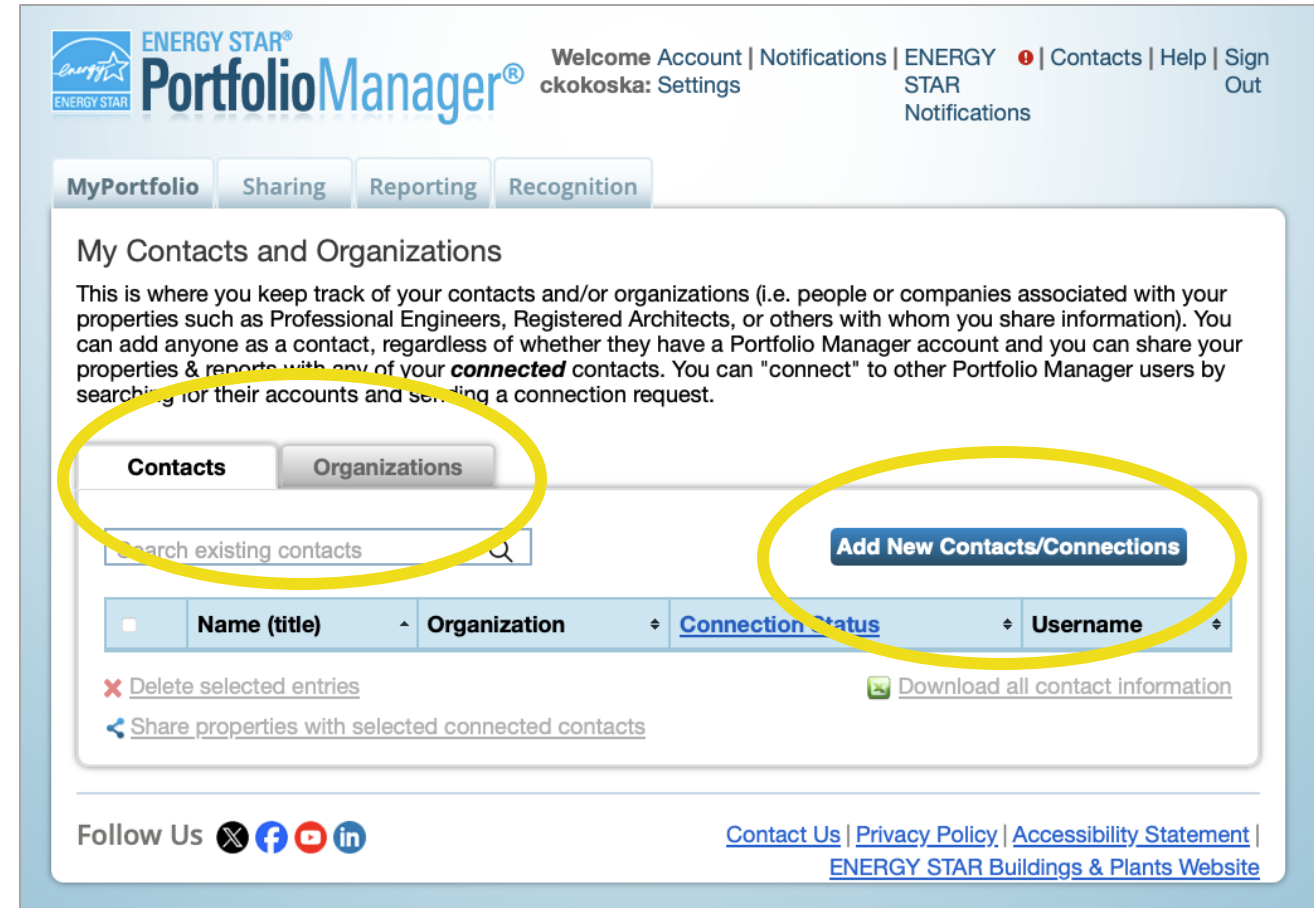
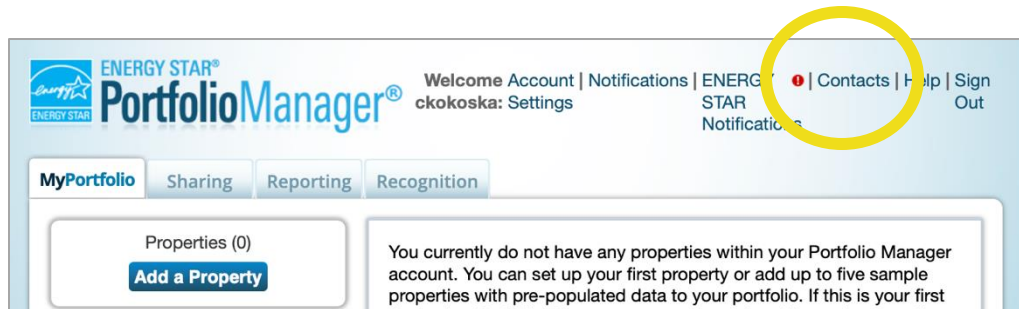
ACCESS PERMISSION TYPES

- 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)

- Add “Organization Name”
- Primary Service (public services or education category)
- Location & Address
- Is your organization an Energy Star Partner (likely, “no”).

ENERGY STAR Portfolio Manager

Welcome Account | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out

MyPortfolio | Sharing | Reporting | Recognition

Add Organization

Add New Organization (enter business or professional contact information)

Organization Name:

Primary Business or Service:

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

Phone:

Fax:

Web Address:

Is your organization an ENERGY STAR Partner? ☐ Yes ☒ No

Add Organization Cancel

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Using Organizations
Adding organizations enables you to sort your contacts by organization and pre-populate property information when you select the organization as a property owner.

Connecting to Organizations
Are you sure you want to add a new organization? Have you searched for this organization (on the main Contacts page)? People often create accounts within Portfolio Manager to manage properties owned/maintained by their organization. To connect to an organizational account, [search for the contact who is the account holder for the organization.](#)

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**”

Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account. If you find the person, send a Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact you would like to add does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

Connect with an Existing User for Sharing
Search using any of the criteria below.

Name:

Organization:

Username:

Email:

Search Cancel

Connecting with Other Users
If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily [share your property](#) information with your contacts.

Keeping Information for Non-Portfolio Manager Users
If the person you want to add does not have a Portfolio Manager account and does NOT need one, you can still add their information to your account. Sometimes you need to add a contact name that doesn't have a Portfolio Manager account to a report or certification application (ex: Signatory, Property Owner).

Organizing Personal Contacts by Organization
Portfolio Manager requires that you select an organization from your Contacts Book for each contact. If the organization you are looking for is not here, you must first [add the new organization](#). After you add the organization it will show up as an option for "Organization".

Add the professional/business contact information for non-Portfolio Manager Users ("You must use the option above if you need to share properties")

First Name:

Last Name:

Job Title:

Organization:

[Add New Organization](#)

Country:

Street Address:

City/Municipality:

State/Province:

Postal Code:

Email:

Phone:

Fax:

Professional Designations:
☐ Professional Engineer (PE/PEng)
☐ Registered Architect
☐ CEM
☐ ASHRAE Building Energy Assessment Professional
☐ Other

Add Contact Cancel

2. MULTI-BUILDING DASHBOARDS

MYPORTFOLIO

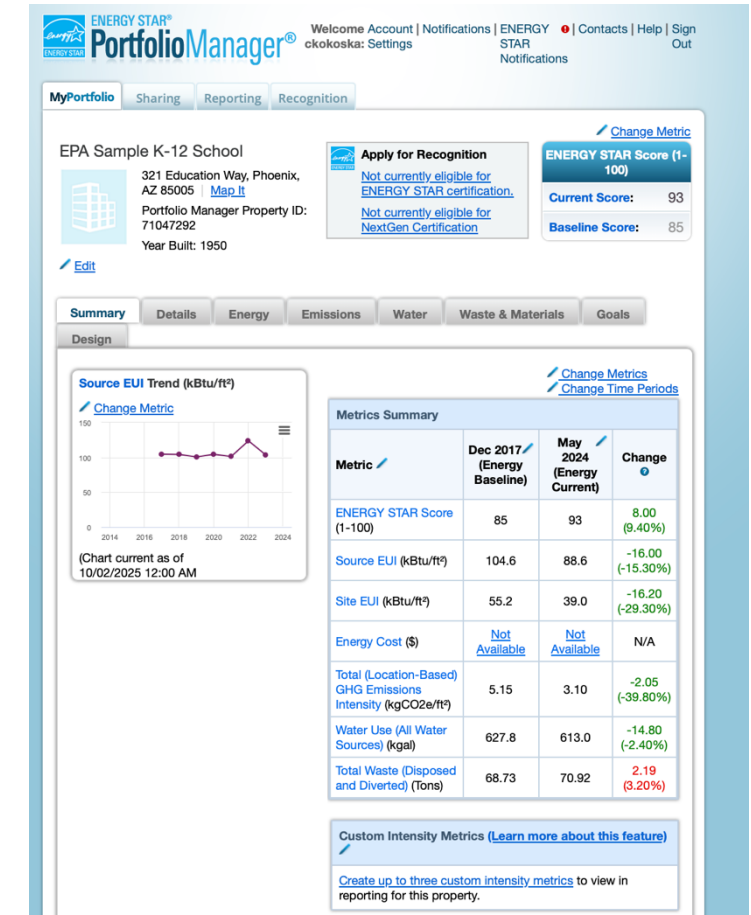
KEY USES

- **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

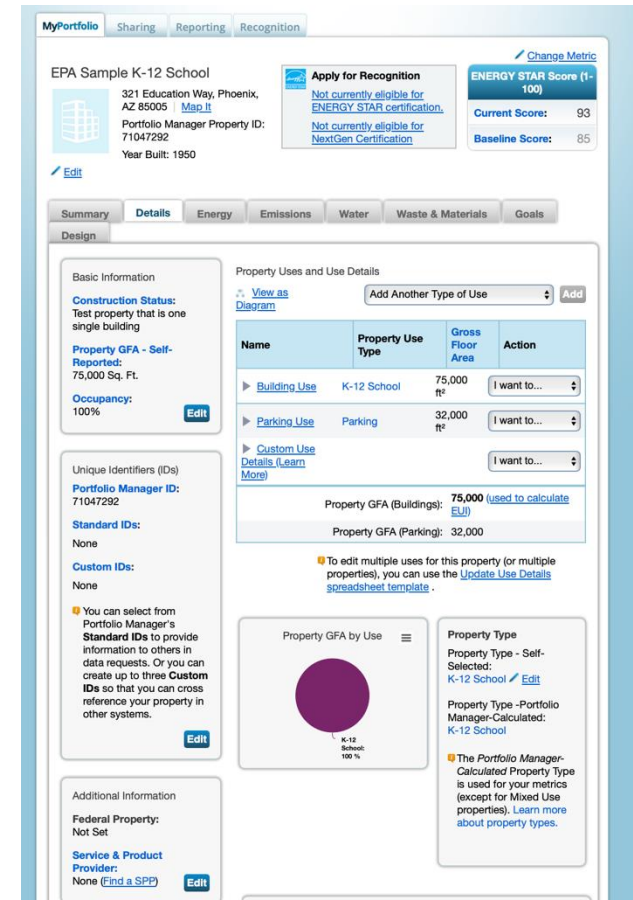
- **CUSTOMIZABLE METRIC CHART**
 - Decide which metrics you want to view over time for a single property.
- **METRICS TABLE COMPARING CURRENT TO BASELINE**
- **DATA QUALITY CHECKER (DQC)**
- **CONTACTS WITH ACCESS TO THE PROPERTY**
- **DOWNLOAD PROPERTY DATA TO EXCEL**



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

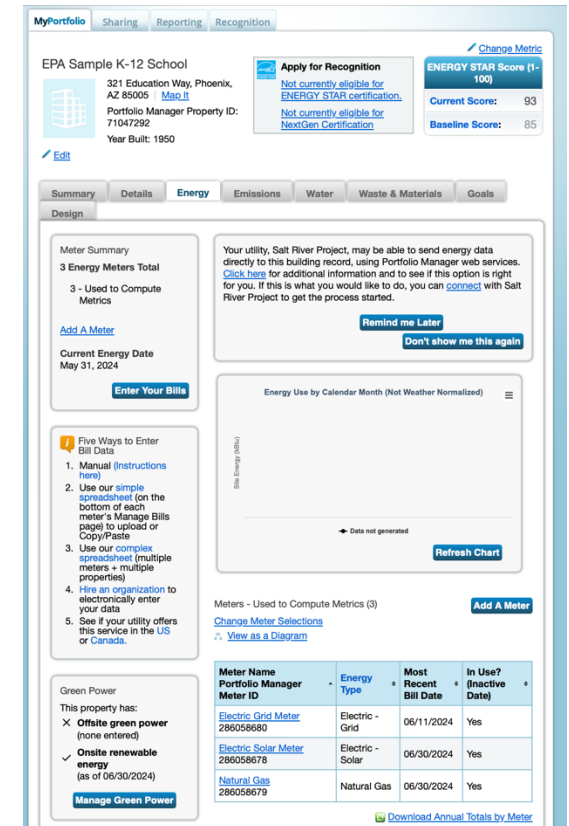
- Building Energy Meters List
- “Add a Meter” Button
- “Enter Your Bills” Button

➤ 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.

The screenshot shows the 'Select Meters to Include in Metrics' page in the Energy Star Portfolio Manager. At the top, there's a navigation bar with 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition' tabs. Below this, a green banner states 'Your meter entries have been added to your meters!'. The main heading is 'Select Meters to Include in Metrics', followed by a subtext: 'Tell us which meters to include when calculating the metrics for 1234 Jefferson St. so that we can provide you with the most accurate metrics possible.' On the left, a 'Summary' box shows '2' meters representing total energy consumption for 1234 Jefferson St. Below this is an 'About Sub-meters' section with a warning icon and text explaining that sub-meters should not be used for total consumption metrics. The main area is titled 'Energy Meters' and contains a table with columns 'Name', 'Meter ID', and 'Type'. The table lists three meters: 'Natural Gas' (checked), 'Electric Grid Meter' (unchecked), and 'Aggregate Electric Grid Meter' (checked). Below the table, there's a section 'Total of 2 meter(s). Tell us what this represents:' with two radio button options. The first option, 'These meter(s) account for the total energy consumption for 1234 Jefferson St. (a single building)', is selected. The second option is 'These meter(s) do not account for the total energy consumption for 1234 Jefferson St. (a single building)'. At the bottom right, there are 'Apply Selections' and 'Cancel' buttons. The footer includes 'Follow Us' with social media icons and a row of links: 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

Name	Meter ID	Type
☒	Natural Gas 67438055	Natural Gas
☐	Electric Grid Meter 67438056	Electric - Grid
☒	Aggregate Electric Grid Meter 106858819	Electric - Grid

3. SINGLE PROPERTY DASHBOARDS

EMISSIONS

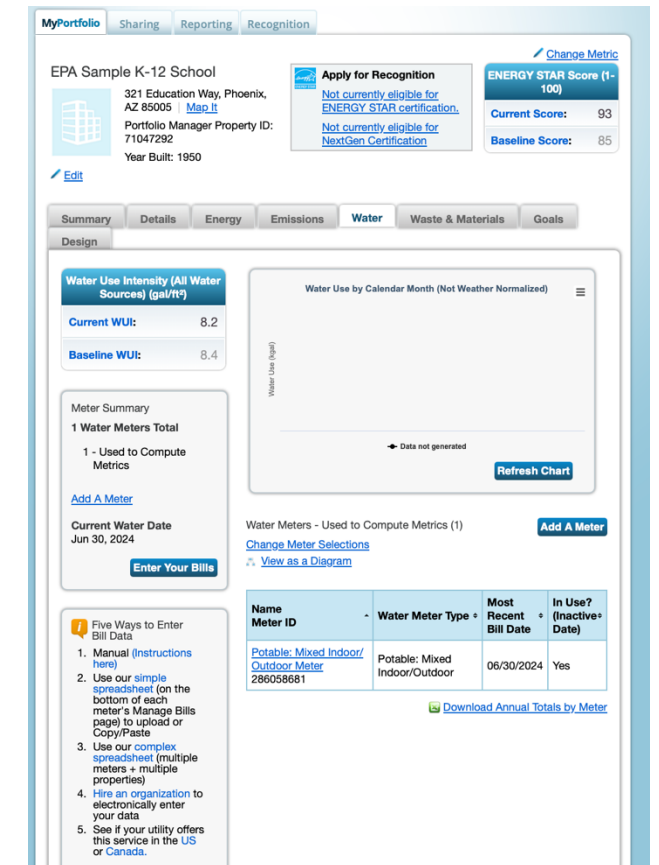
- **GREEN POWER (RECS & ONSITE RENEWABLES, IF APPLICABLE)**
- **EMISSIONS SUMMARY**
 - **Total (Location-Based) Emissions Intensity:** Emissions from a building's utility-supplied energy (i.e. electricity).
 - **Direct GHG Emissions Intensity:** Emissions from the on-site use of fossil fuels (like natural 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 goals.

➤ 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.

The screenshot shows the 'Create a Custom Download' form in the Portfolio Manager interface. The form is titled 'Create a Custom Download' and includes a sub-header 'Whether you have entered one year or ten year's worth of data, you can export your raw data to Excel to see it in one consolidated place. Take a look at an [example download](#) to get a feel for what is included. Use the form below to choose exactly what data you need to download.'

The form is divided into two main sections:

- 1 Select Properties to Include**
 - Properties: [Select Properties](#) Selected Items: 0
 - Download Size Limits**

There is a limit of 1,000,000 rows of data for each spreadsheet download. If you have a lot of data, you may have to download your data in batches instead of all in one file. Make selections on the left to see the number of rows.
 - 2 What type of data do you want to include?**
 - ☐ Basic Property Information
Download basic property information such as name and address
 - ☐ Property IDs
Download property ID's (e.g. Custom ID's, Standard ID's)
 - ☐ Uses
Download which **uses** are at each property (e.g. Office)
 - ☐ Use Details
Download the values entered for your **use details** (e.g. Weekly Operating Hours)
 - ☐ Meters
Download basic information such as name, units and dates when the meter was in use.
 - ☐ Meter Entries
Download individual meter entries you have entered.
 - ☐ Onsite REC Ownership History
Download information about REC ownership of onsite renewable energy.
 - ☐ Offsite Green Power Purchases
Download information about offsite green power purchases.
 - ☐ Market-Based Emissions Factors
Download details about any market-based emissions factors entered for the properties.
 - ☐ Energy Projects
Download information about energy projects.
 - ☐ Design Data
Download design data entered for each property.
 - ☐ Target and Baseline
Download energy target and energy, water and waste baselines for each property.

At the bottom of the form, there are 'Submit' and 'Cancel' buttons.

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.

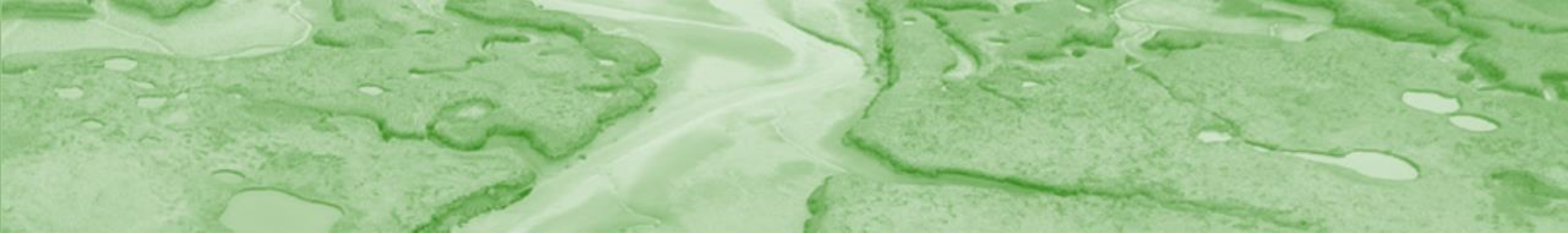
The screenshot shows the 'Create a Report Template' page in the ENERGY STAR Portfolio Manager interface. The page has a header with the ENERGY STAR logo and 'PortfolioManager™'. Below the header is a navigation bar with tabs: MyPortfolio, Sharing, Planning, Reporting, and Recognition. The 'Reporting' tab is selected. The main content area is titled 'Create a Report Template' and includes a brief explanation of report templates. It features four numbered steps: 1. Name Your Template (with a text input field containing 'EUI and Property Details'), 2. Select Timeframe of Information to Include (with a dropdown menu set to 'Current Period Ending Date'), 3. Select Properties to Include (with a dropdown menu set to '- Select Number of Property(ies) -'), and 4. Select Information & Metrics to Include (with a button labeled 'Select Information & Metrics' and a 'Selected Items: 4' indicator). On the right side, there are two 'Tip' boxes. The first tip explains that templates will appear in the Templates & Reports section and that unique names are helpful. The second tip explains that when requesting information from others, only the timeframe and information/metrics need to be selected. At the bottom right, there are 'Save Template' and 'Cancel' buttons. The footer includes social media links (Follow Us) and a list of links: Contact Us, Privacy Policy, Browser Requirements, and ENERGY STAR Buildings & Plants Website.

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 MaineEPRC@poweroptions.org*