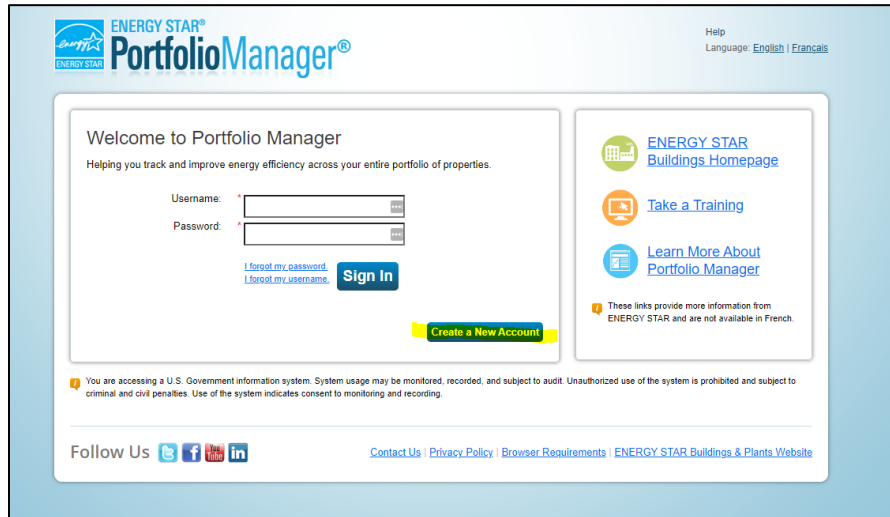


# Step-By-Step Instructions to Create an Energy Star Portfolio Account to Exchange Data with Mountain View Electric Association

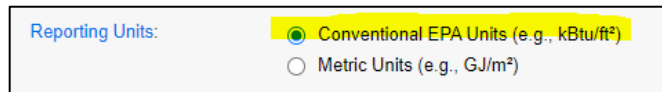
## Step One: Setup Your Energy Star Portfolio Account

1. Go to the Energy Star Portfolio Website ([www.portfoliomanager.energystar.gov](http://www.portfoliomanager.energystar.gov)) and click “Create a New Account”.



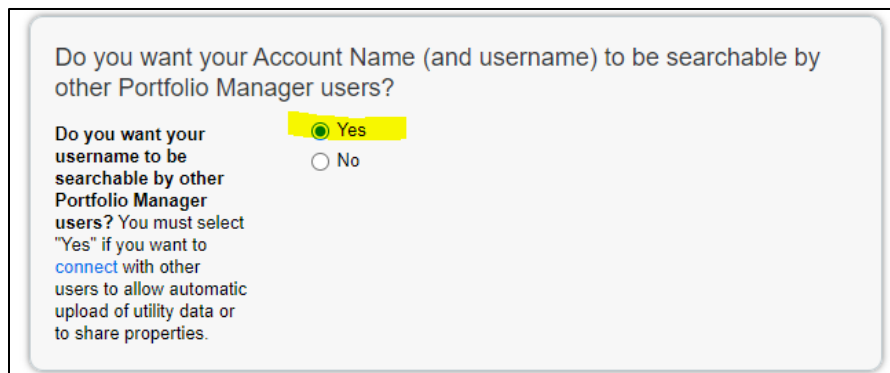
The screenshot shows the Energy Star Portfolio Manager login page. At the top left is the Energy Star logo and 'PortfolioManager' text. At the top right is a 'Help' link and a language selector for 'English | Français'. The main content area has a 'Welcome to Portfolio Manager' message and a sub-header: 'Helping you track and improve energy efficiency across your entire portfolio of properties.' Below this is a login form with 'Username:' and 'Password:' fields, a 'Sign In' button, and a 'Create a New Account' button. To the right are links for 'ENERGY STAR Buildings Homepage', 'Take a Training', and 'Learn More About Portfolio Manager'. A small note at the bottom of the right column states: 'These links provide more information from ENERGY STAR and are not available in French.' At the bottom of the page, there are social media icons for Twitter, Facebook, YouTube, and LinkedIn, along with links for 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'. A disclaimer at the bottom left reads: 'You are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and subject to criminal and civil penalties. Use of the system indicates consent to monitoring and recording.'

2. Enter all pertinent information in the form fields. Keep in mind, while filling out the *About Yourself* section, select “Conventional EPA Units”.



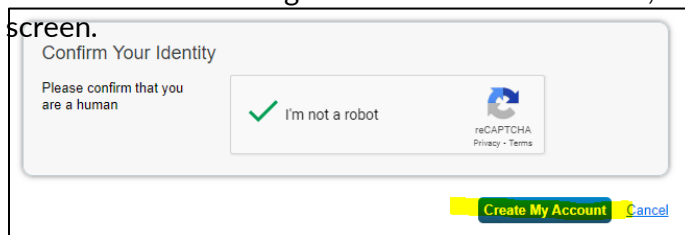
The screenshot shows a 'Reporting Units:' section with two radio button options. The first option, 'Conventional EPA Units (e.g., kBtu/ft²)', is selected and highlighted with a yellow box. The second option is 'Metric Units (e.g., GJ/m²)'.

3. Under the section that asks, “Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?” Be sure to click, “YES”.



The screenshot shows a question: 'Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?'. Below the question are two radio button options: 'Yes' and 'No'. The 'Yes' option is selected and highlighted with a yellow box. To the left of the radio buttons is the text: 'Do you want your username to be searchable by other Portfolio Manager users? You must select "Yes" if you want to connect with other users to allow automatic upload of utility data or to share properties.'

4. Once finished entering in the account information, click “Create My Account” at the bottom of the screen.



The screenshot shows a 'Confirm Your Identity' screen. It asks the user to 'Please confirm that you are a human'. There is a green checkmark icon and the text 'I'm not a robot'. To the right is a reCAPTCHA logo with links for 'Privacy - Terms'. At the bottom, there are two buttons: 'Create My Account' (highlighted with a yellow box) and 'Cancel'.

- Once you have created your account, you will receive an email to the address you listed on the account. On that email, click the hyperlink to verify and finalize your account setup.

Dear MVEA Test Account,

You're almost there... The final step in creating your Portfolio Manager account is to click on [this link](#) to verify your email address, then log into Portfolio Manager. **This link will be available for 24 hours.** If you don't click on this link within 24 hours, you'll need to repeat the process of creating a new account.

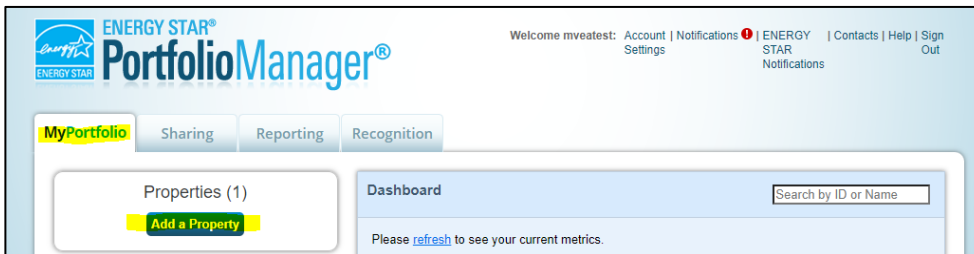
Your username is: mveatest

ENERGY STAR Commercial and Industrial Program

Links contained in this email have been replaced. If you click on a link in the email above, the link will be analyzed for known threats. If a known threat is found, you will not be able to proceed to the destination. If suspicious content is detected, you will see a warning.

## **Step Two: Adding a Property to Your Portfolio**

- Once logged into your account, click on the “My Portfolio” tab in the top left corner, and then click “Add a Property”.



- Select the appropriate answers for each of the three prompted questions. After your selections are made, click “Get Started” at the bottom of the screen.

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!

**Your Property Type**  
We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

**Your Property's Buildings**  
How many physical buildings do you consider part of your property?

None: My property is part of a building (e.g., a Tenant Space)  
 One: My property is a single building  
 More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?

**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.

**Tip**  
To set up a property, you'll need information such as gross floor area and operating hours.

**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.

**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](#).

**Get Started!** [Cancel](#)

- Enter the property information as seen below. Any field that is marked with a \* is required and must be completed to proceed.

**About Your Property**

Name: \*

Country: \*

Street Address: \*

City/Municipality: \*

County:

State/Province: \*

Postal Code: \*

Year Built: \*

Gross Floor Area: \*  Sq. Ft.  Temporary Value  
Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). Do not include parking. [Details on what to include.](#)

Irrigated Area:  Sq. Ft.

Occupancy: \*  %

Property Photo (optional):  No file chosen  
Select an image file on your computer with the format type of .jpg, .jpeg, .png or .gif; photos will be resized to fit a space of 2.78 inches wide x 2 inches tall.

- If you have been provided a Standard ID from the state of Colorado, please enter it in the section shown below. This can remain blank and be entered later if you do not currently have your ID available. Once you have completed the page click **“Continue”**.

**Standard IDs**

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

**Standard ID(s):**

ID:

[+ Add Another](#)

Do any of these apply?

My property's energy consumption includes [parking](#) areas

- Enter your property use information and once complete, click **“Add Property”**.

**Building Use** [Edit Name](#)

Office refers to buildings used to conduct commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area (GFA) should include all space within the building(s) including offices, conference rooms and auditoriums, break rooms, restrooms, kitchens, lobbies, fitness areas, basements, storage areas, stairways, and elevator shafts.

If you have restaurants, retail, or services (dry cleaners) within the Office, you should most likely include this square footage and energy in the 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	<input type="text" value="50,000"/> Sq. Ft. <input type="checkbox"/>	<input type="text" value="1/1/1982"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text" value="50"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1982"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text" value="5"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1982"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text" value="5"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1982"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1982"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text" value="50 % or more"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1982"/>	<input type="checkbox"/>

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

- Once you click **“Add Property”**, you will see a confirmation notice like the one shown below indicating you are ready to proceed to the next step in the process.

Congratulations! You have successfully created your property.

Next, you can:

- [Add energy use information](#), so that you can see your energy performance metrics.

### **Step Three: Adding a Meter to the Property**

**Important Note:** If your property has multiple active MVEA meters/accounts (ex. Property address at 123 Main St. has 3 MVEA meters, 1 meter for heat/tape/ice melt, 1 meter for common area, and 1 meter for internal structure electric needs), you will only be adding **ONE** EnergyStar Portfolio Manager meter to that property. MVEA will add in all active meters to your portfolio to provide the aggregated energy total to you.

If you have any questions regarding this, please contact MVEA at 719-495-2283.

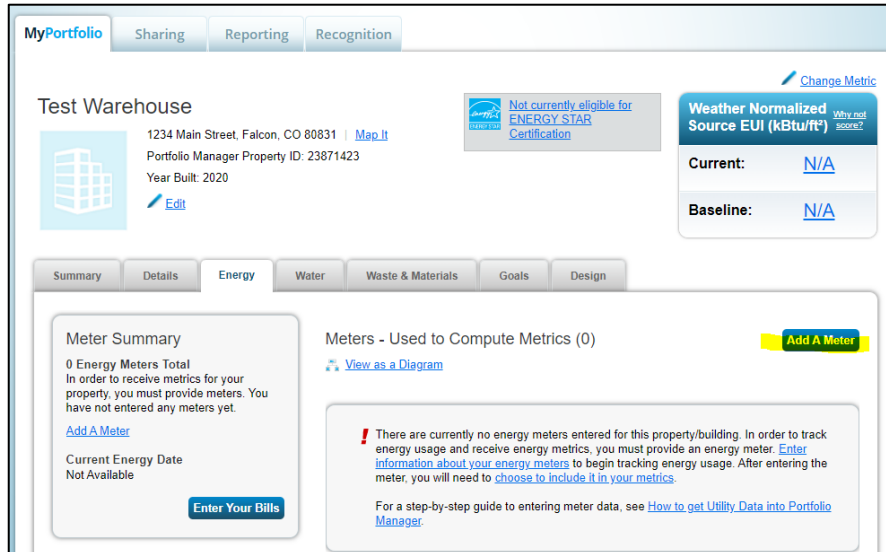
- Click on the **“My Portfolio”** tab to review your property list. Click the property address hyperlink as shown in the example below.

The screenshot shows the 'MyPortfolio' dashboard with tabs for 'Sharing', 'Reporting', and 'Recognition'. On the left, there is a 'Properties (1)' section with an 'Add a Property' button and a 'Refresh to see Source EUI Trend' chart. The main area is a 'Dashboard' with a search bar and a table of properties. The table has columns for Name, Energy Current Date, ENERGY STAR Score, Site EUI (kBtu/ft²), and Source EUI (kBtu/ft²). A single property, 'Test Warehouse 23871423', is listed. Below the table are navigation buttons: 'First', 'Previous', 'Page 1 of 1', 'Next', 'Last', and a dropdown for '100'. The bottom right shows 'View 1 - 1 of 1'.

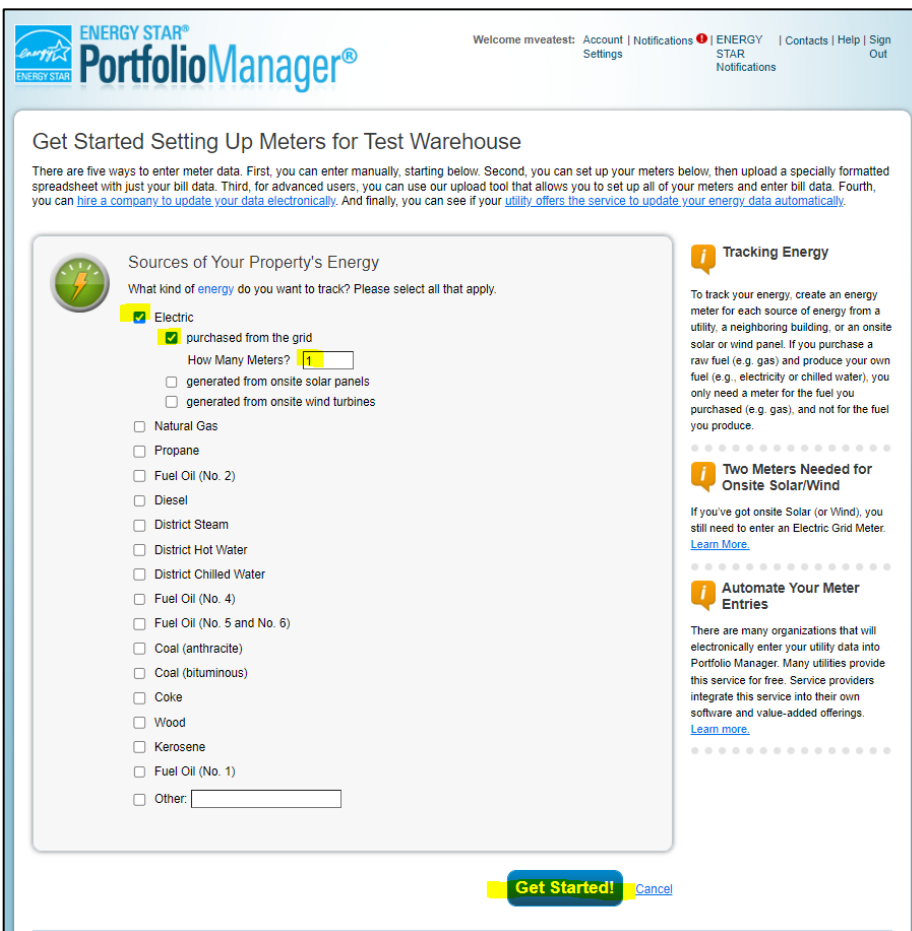
- Then select the **“Energy”** tab.

The screenshot shows the 'Energy' tab for the 'Test Warehouse' property. The address is '1234 Main Street, Falcon, CO 80831' and the Portfolio Manager Property ID is '23871423'. The year built is '2020'. There is a 'Change Metric' link and a 'Weather Normalized Source EUI (kBtu/ft²)' box showing 'Current: N/A' and 'Baseline: N/A'. A 'Not currently eligible for ENERGY STAR Certification' badge is also present. At the bottom, there are tabs for 'Summary', 'Details', 'Energy', 'Water', 'Waste & Materials', 'Goals', and 'Design'.

3. Click "Add Meter".



4. To receive MVEA's electric data, please ensure that you click "Electric" from the "Sources of Your Property's Energy" menu. This will then present more detailed options to be selected for where your energy comes from. **Since the information for the property will be aggregated you will only select "Purchased from the Grid" and enter "1" for the number of meters. Then click "Get Started".**



- After selecting “Get Started”, you will see the box shown below. It is required to select the “Units (kWH)” and enter the date the meter/service was activated. Although not required, the option to click “Custom Meter ID” and enter the description of service(s) is available. Once the information has been entered, click “Create Meters”.

ENERGY STAR® PortfolioManager®

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

### About Your Meters for Test Warehouse

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

1 Energy Meter for Test Warehouse (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	C
<input type="checkbox"/>	Electric Grid Met	Electric - Grid		kWh (thousan)		<input checked="" type="checkbox"/>		<input type="checkbox"/>	1

[Delete Selected Entries](#)  
[Add Another Entry](#)

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- After the meter has successfully been created, a green box will appear at the top of the page as a confirmation.

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later.

## **Step Four: Adding Mountain View Electric Association as a Contact to Your Portfolio**

- Now that you have successfully created your property and meter, adding MVEA as a contact is the next step. Start by clicking “Contacts” in the top right corner of the page.

ENERGY STAR® PortfolioManager®

Welcome mveatest: Account | Notifications | ENERGY STAR Notifications | **Contacts** | Help | Sign Out

MyPortfolio | Sharing | Reporting | Recognition

Properties (1)

Refresh to see Source EUI Trend

Dashboard

Please [refresh](#) to see your current metrics.

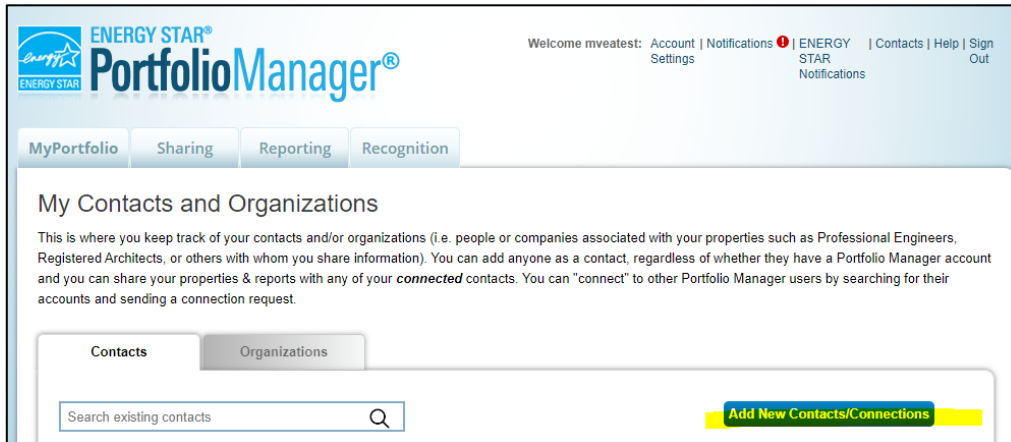
View All Properties (1) | Energy Highlights |

[Add/Edit/Delete Groups](#) | [Add/Edit/Delete Views](#)

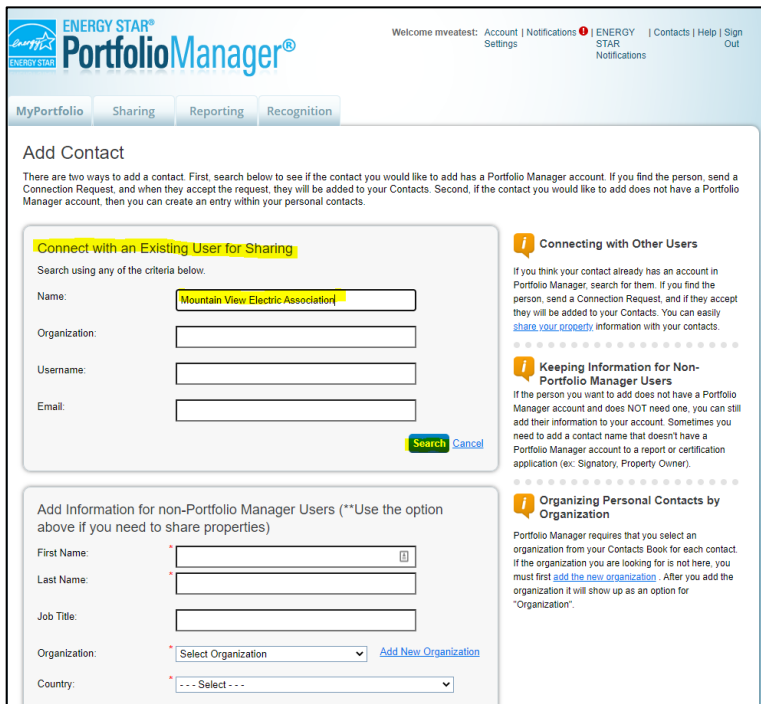
Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft²)	Source EUI (kBtu/ft²)
<a href="#">Test Warehouse</a> 23871423				

Page 1 of 1   100  View 1 - 1 of 1

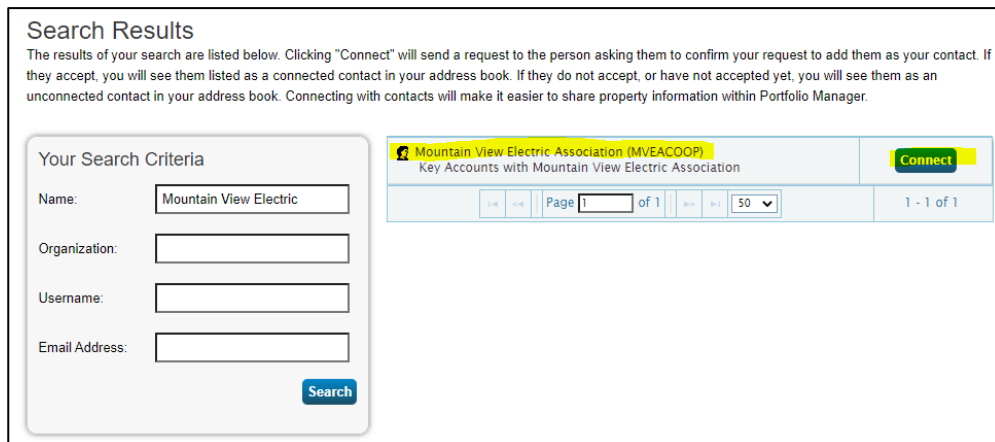
2. Click “Add New Contacts/Connections”.



3. Under “Connect with an Existing User for Sharing”, type in “Mountain View Electric Association” under the name field and then click “Search”.



4. MVEA will appear as a search result on the right side of the screen. Click the button that says “Connect”.



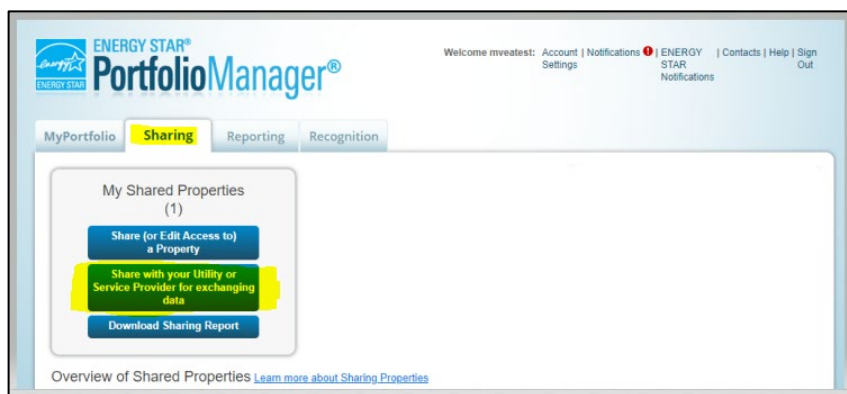
5. A confirmation message will then appear verifying that your request has been sent to MVEA. Once this request is accepted, you will then be able to share property information with MVEA.

**A connection request has been sent to Mountain View Electric Association**

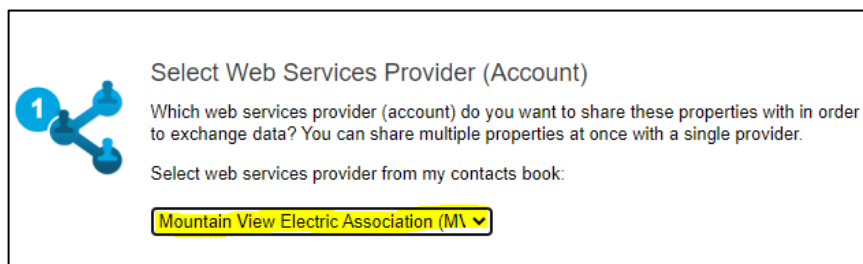
When Mountain View Electric accepts your request, you will be able to share property information.

### **Step Five: Sharing and Exchanging Data with Mountain View Electric Association**

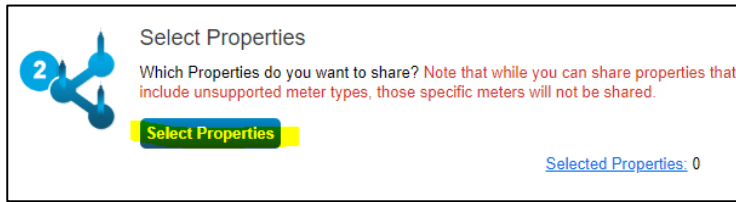
1. After MVEA has accepted the contact request, authorizing the sharing/exchanging of energy data is the final step. From the portfolio home screen, click the **“Sharing”** tab. Then, click the middle option, **“Share with your Utility or Service Provider for exchanging data”**.



2. On the next page, select Mountain View Electric Association (MVEACOO) from the drop-down menu under **“Select Web Services Provider from My Contact Book”**



3. In the next section click **“Select Properties”**. Use that link to open the list of properties that have already been entered on the site. If more than one property has been entered, the option to select to share them all instead of having to share them individually is available. Once the properties are selected click, **“Apply Selection”**.

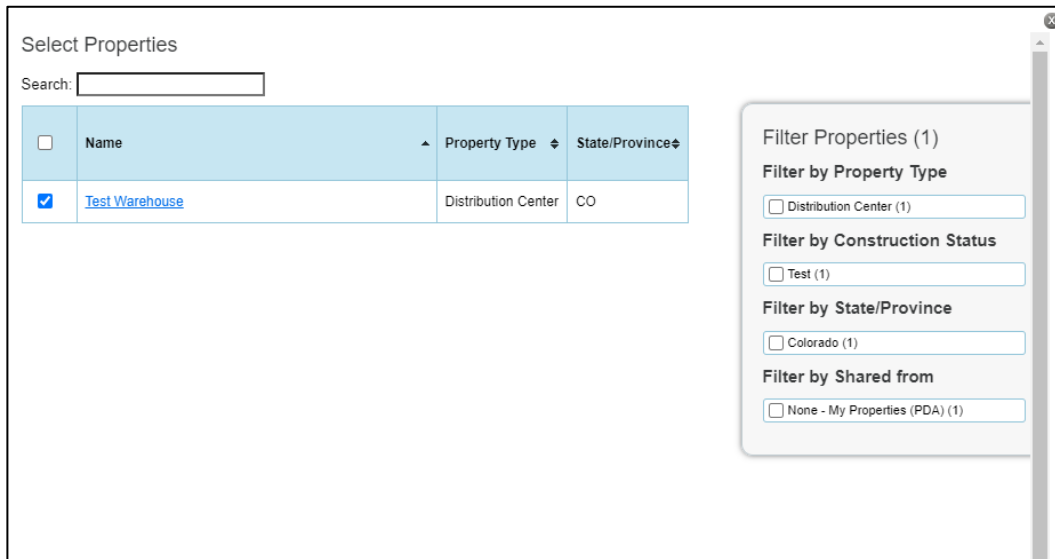


**2** Select Properties

Which Properties do you want to share? Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.

**Select Properties**

[Selected Properties: 0](#)



Select Properties

Search:

<input type="checkbox"/>	Name	Property Type	State/Province
<input checked="" type="checkbox"/>	<a href="#">Test Warehouse</a>	Distribution Center	CO

Filter Properties (1)

**Filter by Property Type**

Distribution Center (1)

**Filter by Construction Status**

Test (1)

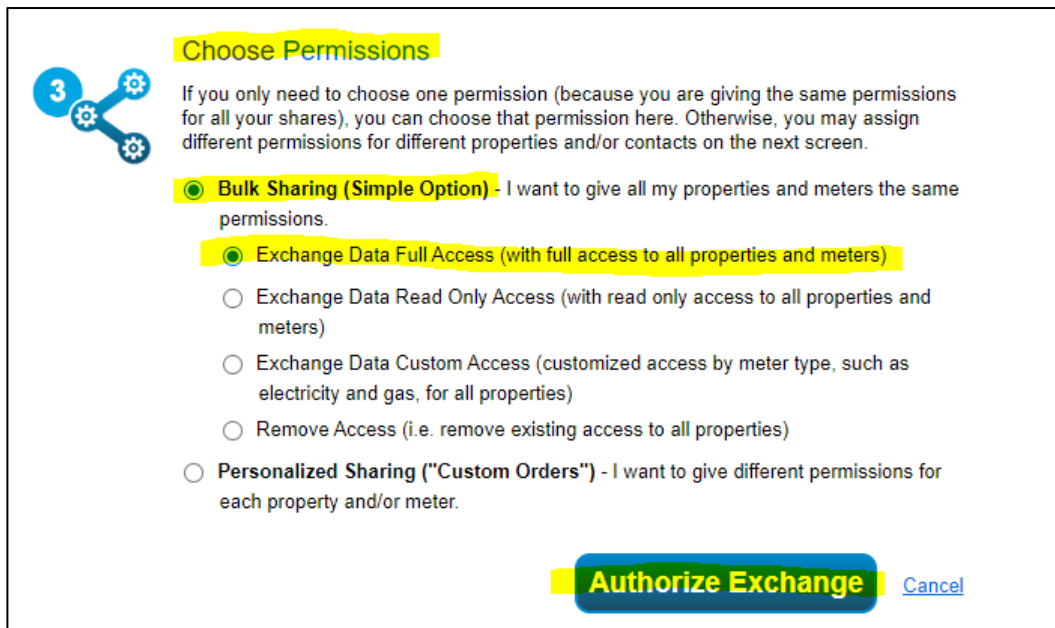
**Filter by State/Province**

Colorado (1)

**Filter by Shared from**

None - My Properties (PDA) (1)

4. For MVEA to provide the energy usage information, it is required to furnish the state. Under the **“Choose Permissions”** section, click **“Bulk Sharing”**, and then click, **“Exchange Data Full Access (with full access to all properties and meters)”**. After making these selections, click **“Authorize Exchange”**.



**3** Choose Permissions

If you only need to choose one permission (because you are giving the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

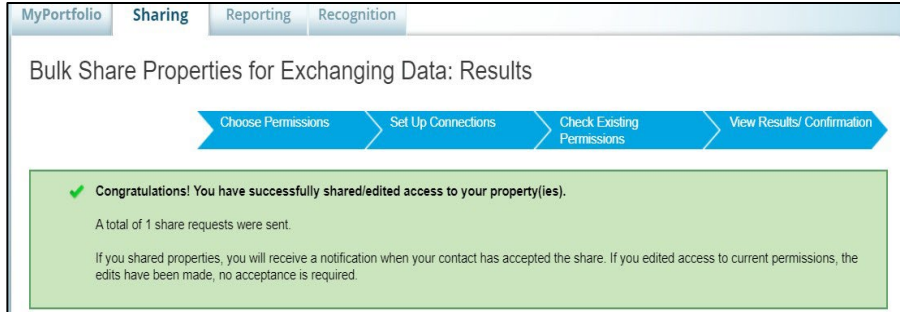
**Bulk Sharing (Simple Option)** - I want to give all my properties and meters the same permissions.

- Exchange Data Full Access (with full access to all properties and meters)**
- Exchange Data Read Only Access (with read only access to all properties and meters)
- Exchange Data Custom Access (customized access by meter type, such as electricity and gas, for all properties)
- Remove Access (i.e. remove existing access to all properties)

**Personalized Sharing (“Custom Orders”)** - I want to give different permissions for each property and/or meter.

**Authorize Exchange** [Cancel](#)

5. A confirmation message will show once successfully establishing the sharing/exchanging of energy data with MVEA has been completed.



For any additional questions, please contact MVEA at 719-495-2283.