



CCC Proposition 39 Portfolio Manager Set-Up Instructions

Proposition 39, the Clean Energy Jobs Act of 2012, and its enabling legislation SB-73, requires that Community College Districts report the results of energy project implementation to a Citizens Oversight Board (COB) on an annual basis. In order to meet these reporting requirements, Districts must report both annual energy usage as well as Energy Use Intensity (EUI) at the “site” level (campus, center, or office complex). This data will serve as a benchmark against which savings achieved through the implementation of energy projects can be measured. The Community College Chancellor’s Office has determined that the most effective means to meet these benchmarking requirements system-wide will be to employ the US EPA Energy Star® Portfolio Manager software. This software is free to users and will fulfill both the Proposition 39 requirements as well as enable the Chancellors Office to more efficiently aggregate energy usage data system wide.

These instructions are intended to guide you through the process of setting up your Portfolio Manager account for your Community College District’s college campuses, centers, and office properties. For additional questions or concerns you may ask direct questions or view frequently asked questions at Portfolio Manager’s Help Desk:

<https://portfoliomanager.zendesk.com/hc/en-us>

You may also contact Liz Balke from Newcomb Anderson McCormick by email at CCCUupdates@newcomb.cc or by phone at (415) 230-8428 for assistance in setting up your Portfolio Manager account.

Below is a basic list of some of the things you may need. Building information may be located in the district FUSION data. Utility information is likely located on your utility bills.

- Complete district site list.
- Site addresses.
- Year the site was built. Estimation can be used.
- Total gross square footage for each campus or center.
- Total Parking Square Footage divided by open lot, partially enclosed lot (above ground), and fully enclosed lot (below ground). Estimations can be used. Google Earth can be used if no information is available.
- List of number and size of indoor and outdoor swimming pools at each site.
- Utility numbers. Typically can all be located on your utility bills.
 - Customer Account Number (SCE)
 - Service Account Number (SCE)
 - Meter Number (PG&E, SCG, SDG&E)
- District Tax ID. Only the last 4 digits will be needed.
- Date Meter became active. A place holder date of at least 2 years can be used.

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1. Account Set-Up

Before you can begin entering data on your portfolio of properties, you will be required to create an online Portfolio Manager account.

- Open your web browser and proceed to:

<https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager>

- Locate and click the **“Sign Up”** button on the right side of the screen.
- Create your account.



Current Portfolio Manager Users

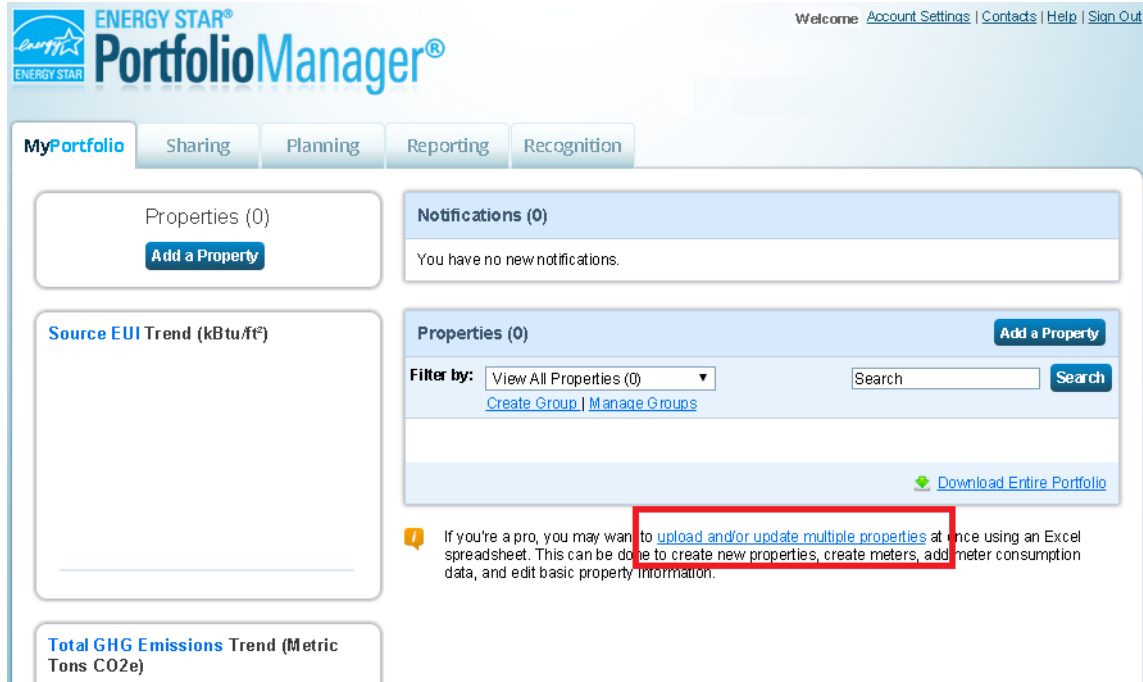
username

password

[Forgot password?](#) **LOG IN**

- Your Username should be your District name followed by ‘CCD’
Example: “Los Rios CCD” or “San Mateo County CCD”
(Note: Your username cannot be modified after you create your account, but all other account information can be changed later).
- Create a password for your account and be sure to record it.
- Your address should be the address of the District office.
- Primary Business or Service of Your Organization:
Select “Education”
- Will you be using the web services API to develop software to exchange data with Portfolio Manager?
Select “No”
- Can other people search for you and send you a connection request?
Select “Yes”

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2. Property Set-Up

Properties will be the sites or locations within Portfolio Manager. For Prop 39 purposes you will be treating each property as a “site” as defined within FUSION. Therefore, you must match the properties in Portfolio Manager to your District’s property list in FUSION. This means you will not be uploading each individual building as a “property” but rather entire campuses or center which can consist of one or multiple buildings.

You will now see your Portfolio Manager Account homepage (shown above). This guide will walk you through property set-up using the **“Upload and/or update multiple properties”** method. You may also use the **“Add a Property”** link, to add a single property at a time. The “Upload and/or update multiple properties” method allows you to upload multiple properties simultaneously.

- Click on the **“Upload and/or update multiple properties”** link outlined in red to proceed. This will take you to the upload screen below. From here you will generate a properties upload spreadsheet which will require basic property information such as name, address, gross floor area, etc.
- Click on the **“Add Properties Template”** link, outlined in red, to proceed. Clicking this link will cause a download to occur. You may be prompted to open the downloaded spreadsheet or you may need to locate the file in your computer’s “Downloads” folder. The uploaded spreadsheet will be saved in the "Downloads" file for future use if desired. Generally the “Downloads” folder is located in your main folders similar to your “Documents” folder. The upload spreadsheet file will be in Microsoft Excel format and will be named “Add_Properties_en”.

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MyPortfolio | Sharing | Planning | Reporting | Recognition

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [entering each property manually](#) or adding bills manually. [Learn more below.](#)

What do you want to upload?

- **Add new properties to my account** - To get started, fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in this custom template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template: No file chosen

Select "Browse" to locate the file on your computer and then select "Upload."

⚠ This is a powerful feature. Be careful

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

[Close](#)

Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

- Proceed by clicking on the download pop-up or opening the excel file in your **“Downloads”** folder.
- Upon opening, the Excel upload template file will display the first of nine sheets. From left to right the sheets are **“Instructions”**, **“Properties”**, **“Federal Property Info”**, **“Unique Identifiers”**, **“Uses”**, **“Parking”**, **“Swimming Pool”**, **“Wastewater Treatment Plant”**, and **“Upload Tips”**. Please read through the **“Instructions”** sheet and the **“Upload Tips”** sheet for additional information.
 - For our immediate purposes we will only be using the **“Properties”**, **“Uses”**, **“Parking”** and **Swimming Pool”** sheets to upload your district’s property information

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The screenshot shows an Excel spreadsheet titled "Add_Properties_en - Excel". The ribbon includes FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, and DEVELOPER. The spreadsheet has the following data:

	A	B	C	D	E	F	G
1	*Property Name	*Street Address	Street Address 2	*City/Municipality	*State/Province	**Other State/Province	*Postal Code
2	Sample 1	1 Walnut Street		Detroit	NY		65772
3	Sample 2	123 Main Street		Arlington	AK		22201
4							
5							
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12							
13							
14							
15							

The bottom navigation bar shows the following sheets: Instructions, **Properties**, Federal Property Info, Unique Identifiers, Uses, Parking, Swimming Pool, and a plus sign for more sheets.

○ Properties Sheet:

- Follow the instructions listed and input all of the required property information in the “Properties” sheet.
- Use your campuses FUSION data as a standard for naming conventions and other property information. If you have properties that are not included in your FUSION data, list them on the property sheet and group them according to your district’s own property list.
- **Use the following naming convention when naming our properties** located in Column A of the properties upload spreadsheet.
 - District Name – FUSION Property Name
 - Example: Los Rios Community College District, American River College would appear as:
“Los Rios - American River College”
 - In the absence of a FUSION entry such as for small buildings or new properties not entered into FUSION, use the full name of the property without abbreviations or acronyms.
 - Make sure all names do not end with a space. Ending a property name or a use name with a space will result in an error when uploading the spreadsheet.

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- Your property square footage will be entered in Column L under the “Gross Floor Area” header. This gross square footage must be consistent with the Gross Square Footage as defined in FUSION.
 - Keep in mind that all your gas and electric meters will need to have a corresponding property with matching site address. Red column headings denote required fields.
 - In the “Primary Function” column list the appropriate function of the property. This can be a generalized building function. For example, a building with majority classroom space can be listed as “College/University”. A building with majority office space such as a district office or facilities management can be listed as “Office”.
 - In the “**Occupancy (%)**” column, list 100% unless there is a section of a property that is abandoned or regularly unconditioned and without use. This field does not consider time of use or schedule. Time of use can be added separately after upload.
- **Uses Sheet:**
 - Under the “Uses” sheet fill-in the specific uses for each property. There can be multiple uses for each property if necessary. The more specific your information, the more accurate your final property data will be.
 - The “Use Type” column may be the same as the “Primary Function” of the property. Refer to the “Instructions” tab for more detail.
 - The “Gross Floor Area Temporary Value? (Y/N)” column under the “Uses” tab is a Yes/No question. Only put “Yes” if the value you are using is a placeholder (you will need to update this after your property is uploaded). Answer with “No” if you are putting in your exact or best known “Gross Floor Area”.
 - **Parking Sheet:**
 - Under the “Parking” tab. You will need to enter the total lot space and parking type for each parking space on each property. Multiple parking lots on a single property or college campus can be combined in a single entry. For our purposes, estimations can be made in lieu of exact area.
 - You may say “No” in any of the “...Temporary Values Y/N” columns.

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- You will need to differentiate between three predetermined parking types. They will each have a separate column for. Unused columns must have a zero in the cell for upload to be successful.

Types:

- Open parking lots, with or without shading or some form of cover.
- Completely-enclosed parking garages which require mechanical air circulation.
- Partially-enclosed parking garages which have free air flow.
- Most below-ground parking garages are enclosed and most above ground garages generally are open.

○ Pools Sheet:

- Under the “Swimming Pools” tab enter the information specific to the pools on your campus.
- Unlike parking, there must be a single entry for every individual pool since the size column is a drop down box and not a manually entered value.
- If you have a unique sized pool, select the closest approximate value.

- Save your Excel uploads file as a new file name somewhere you can locate it on your computer either in a folder or on your desktop.

○ Upload Your Properties Sheet:

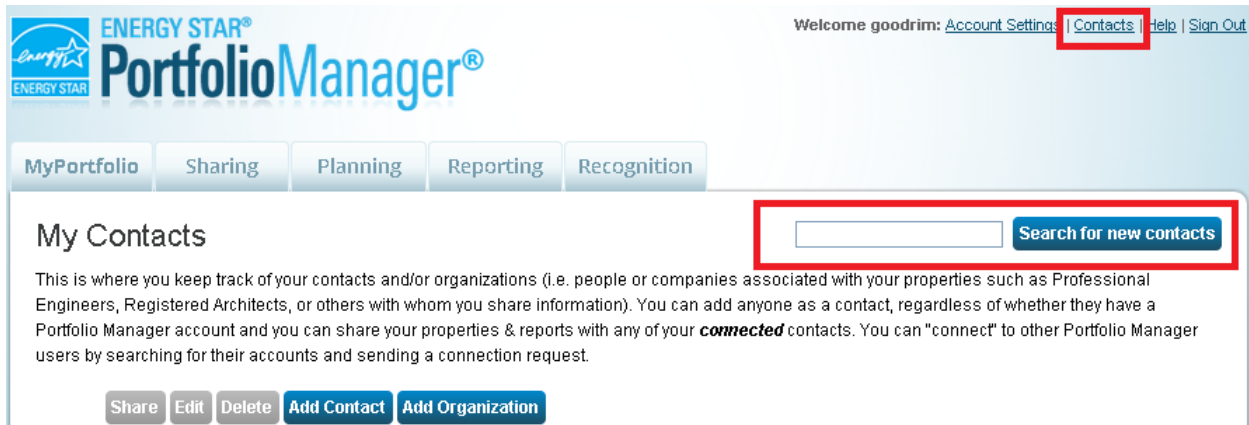
- Return to the “**Upload and/or update multiple properties**” webpage where you generated the upload spreadsheet (image on page 3). This is the link from the homepage labeled “**Upload and/or update multiple properties**” (located on the bottom right).
- Locate the “Upload Spreadsheet” section.
- Under “Type of Upload” click “**Please Select Type**” and select “**Add New Properties**” from the dropdown box.
- Click “**Choose File**” and locate the latest version of the file you wish to upload.
- Click “**Upload**”
The upload status of your file will say “Processing” for a moment. If the upload succeeds you are done uploading your properties at this time and can now set up your meters. If the upload fails, click on “**View Errors**” and correct any mistakes in your upload spreadsheet.

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3. Create Contacts

“Contacts” are people or organizations who you can share information or properties with. You will want to connect with your utility provider in order to receive automatic uploads for your meter data. You will also want to connect with the “CALIFORNIA COMMUNITY COLLEGE CHANCELLOR’S OFFICE (CCCCO)” account. By connecting with the CCCCCO account you will be able to share your property and energy usage data with the Chancellor’s Office via Portfolio Manager. By doing so, the Chancellor’s Office will be able to assist with gathering the necessary data for reporting to the Citizen’s Oversight Board directly through Portfolio Manager. To accomplish this proceed as follows:

- Locate the “**Contacts**” link at the top-right of your web browser. This link will take you to your “My Contacts” page. See below image for help locating the link.
- Locate the field next to “Search for new contacts”



- Enter the name of the contact you are planning to add.
 - Add “CALIFORNIA COMMUNITY COLLEGE CHANCELLOR’S OFFICE (CCCCO)”.
 - If your district is in a Publicly Owned Utility (POU) territory, check with your utility provider to see if they offer monthly online automatic uploads.
 - Select your desired contact from the search results. Click “**Connect**”. The connection process may take 3-5 business days to register.
 - If your utility prompts you for authentication information at this stage, please enter the necessary information.

4. Sharing with the California Community College Chancellor’s Office (CCCCO)

You will need to grant full access to the CCCCCO in order to allow the Chancellor’s office to assist with

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Portfolio Manager administration, troubleshooting, and reporting. Once you have connected with the “CALIFORNIA COMMUNITY COLLEGE CHANCELLOR’S OFFICE (CCCCO)” account.

- Click the **“Sharing”** tab near the top left of your account home-page.
- Click the **“Share (or Edit Access to) a Property”** button.
- Under “Properties”, Select **“All Properties”**.
- Under “Select People (Accounts)”, Select **“California Community College Chancellor’s Office”**.
- Under “Choose Permissions”, Select **“Bulk Sharing”**.
 - Options will appear below “Bulk Sharing” prompting you to choose the level of access. Select **“Full Access”**.
- Click **“Share Property(ies)”**.
- A success message will appear at the top of the web browser. Sharing will be finalized once the CCCCCO accepts your shared properties.

5. Upload Utility Meters

As previously stated, for Prop 39 purposes we will be tracking utility meters at the “site-level” (i.e. campuses or centers and not individual buildings). This means that you do not need to upload every meter and sub meter at a given property. The only meters that will require uploading to Portfolio Manager are the parent meters that are able to capture the entire site’s gas and electric usage. As a reminder, Prop 39 does not require water meters to be uploaded to Portfolio Manager.

- To upload your utility meters follow the steps below. For Prop 39 purposes we are tracking meter usage at the “site level” as described above during property set-up.
- If you need to track energy usage that is not metered by your utility, such as Propane or Diesel deliveries, you will want to follow the same steps as uploading a regular utility meter but you will not be linking it with a utility provider.
 - Click the **“My Portfolio”** tab near the top left of your account home-page.
 - Click on the **“Upload and/or update multiple properties”** link at the bottom right.
 - On the right, in the section labeled “Edit and Manage Information”, click the **“Create an Upload Template”** button.
 - Under “Select the Task you are performing”, select **“Add Meters to Existing Properties”**.

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- Select your desired properties. Select “One Property”, “Multiple Properties”, or “All Properties” as applicable. If a property has a metered utility service and your utility provides online automatic data uploads via Portfolio Manager, then you will want to upload that meter.
- Select which type of meters you are uploading, e.g. Electric and/or Natural Gas (you are *NOT* required to upload your water meter information for Prop 39 purposes).
- Under “Electric” select the type and quantity of electric meters you will be uploading.
- Under “Natural Gas” select the quantity you will be uploading.
- Click the “**Create & Download Template**” button at the bottom.
- Open the “**Add Meters**” spreadsheet in your download’s folder. Refer to the instructions on the first tab.
- Under the “Create Meters (Energy)” fill in the required meter information for each property. It is okay to leave empty rows, or delete unused rows as desired. If you need additional rows you can copy rows containing the correct property name.
- Under “Meter Name” use the following naming conventions depending on your utility:

Pacific Gas & Electric Company (PG&E):

PG&E recommends you use the *meter number* in the "Name" field.

Southern California Edison (SCE):

SCE recommends that you name the electric meter with the meter’s *Service Account Number*. Their service account number is 13 characters long and looks like this: 3-000-0000-00 (enter dashes as well).

Southern California Gas Company (SCG):

Make sure all of your "Meter Name" fields on the Meter tab are populated only by *active SoCalGas meter numbers*, (not a name like “Gas Meter 2nd Floor”). Meter numbers should be entered using leading zeroes so they contain 8 digits.

San Diego Gas & Electric (SDG&E):

In the "Name" field, enter *ONLY* the 8-digit *meter number* beginning with 0.

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For Publicly Owned Utility meters, check with your local utility to see if they provide Portfolio Manager upload service and if they have a preferred naming convention.

For Non-Utility meters use a naming convention such as:

'[Fuel Type] Meter #[Meter #]'

Example: "Propane – Meter # 12345678"

- Use a similar naming convention for Service ID numbers or Account numbers if that is what your utility provider uses.
- In the "Include in Property Metrics?" column, select **"Yes"**.
- Save the file. Make sure to note the location of the file.
- Return to the "Upload and/or Update Multiple Properties" page. Under the "Upload Spreadsheets" section:
 - Select the type of spreadsheet as **"Add Meters to Existing Properties"**
 - Click **"Choose File"** and locate the Excel file you just created.
 - Click **"Upload"**. If the upload failed. Click "View Errors" and correct all errors that are noted.
- Repeat the previous upload step once the errors have been addressed. If an error persists please contact Liz Balke at Newcomb Anderson McCormick for assistance by emailing CCCUpdates@Newcomb.cc.

6. Share with your utilities

Sharing with your utility will only be available if it is a feature that your gas or electric utility provides. If possible, you will want to share with them in order to receive automatic utility bill uploads in order to minimize the amount of manual entry.

- Click the **"Sharing"** tab near the top left of your account home-page.
- Click the **"Share (or Edit Access to) a Property"** button.
- Select your desired properties.
 - Select "One Property", "Multiple Properties", or "All Properties" as applicable. If a property has a metered utility service and your utility provides online

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automatic data uploads via Portfolio Manager, then you will want to share that property.

- If all of your properties are serviced by the same utility provider, you may select “All Properties” and proceed.
- Select the account you wish to share with.
 - Select all the accounts you wish to share with.
 - Under “Choose Permissions” select “I need to give different permission for different share requests”, and/or “I need to give Exchange Data permissions”.
 - Click “**Continue**”
- For each of your properties you will select the appropriate level of access for each contact. Access levels for the CCCC account and the data exchange with your utility are detailed below. Access levels for any other contact should be evaluated on a case by case basis. For Proposition 39 purposes, the CCCC account must have full access in order to gather the required information for reporting to the COB. Proceed as follows:
 - Select “Exchange Data” for each of your utility providers. If a property does not receive service from one of your utilities, you can select “None”.
 - Edit your “**Exchange Data**”.
 - Click “**Edit**” under your property for your utility for which you wish to receive monthly utility updates.
 - Under “Property Owner” type in your District name. Example: “Example CCD”
 - In the row labeled “Property Information” select “**Read Only Access**”
 - All Meter Information. For the meters operated by the selected utility, select “**Full Access**”.
 - Under “ID Type”, enter only: “M” for Meter # or “S” if you are using Service Agreement ID. If for example your utility is requesting the account number, you will still
 - Copy the Meter number from your meter name over to the “Meter” column.
 - Repeat for all your meters for each utility and each property.
 - In the row labeled “Goals, Improvements, & Checklists” select “None”.
 - In the row labeled “Recognition” select “None”.

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- In the bottom section labeled “Item” under “Share Forward” select “No”.
- Click **“Apply Selections & Authorize Exchange”**.
 - Note:** This process may vary slightly based on the information required by your utility. Some utilities provide instructions online which are specific to their process. If you are having difficulty try locating instructions online or contact Liz Balke at Newcomb Anderson McCormick by emailing CCCUpdates@Newcomb.cc.
- When all of your meters at all of your properties have been shared with their appropriate utility, scroll to the bottom of your web browser and click **“Share Property(ies)”**.
- Your utility provider will generally take 3-5 business days to review your meter information and accept your shared meters for each property. You will receive a notification on your Portfolio Manager home page when the share has been accepted.

7. Upload Monthly Energy Usage from Utilities or Deliveries

If one of your properties receives energy input that is not metered and/or automatically uploaded to your account by the utility, you will need to manually enter this energy usage data to accurately represent your property’s energy usage. Examples of this may include monthly propane deliveries or solar meters that are not automatically uploaded or monitored by your utility.

To upload your energy usage manually:

- From your account homepage click **“My Portfolio”**.
- Select the property that is receiving the energy usage data.
- Click the **“Meters”** tab.
- Select **“Manage/Enter My Bills”** which is located on the left of the webpage.
- Select the meter to which you would like to add data.
- Click **“Add Another Entry”**.
- Fill in the Date, Quantity, and Cost.
- Click **“Save Bills”** .

8. Generating Reports

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Portfolio Manager provides the ability to summarize the available energy usage data and calculations results into easy to view reports.

- From your account homepage click **“Reporting”**.
- Select the **“Partner of the Year Report”**.
- This report template is premade for us in Portfolio Manager and contains two useful metrics: the **“Site Energy Use (kBtu)”** and the **“Site EUI (kBtue/ft²)”**.
- Under the **“Action”** column, in the **“I want to…”** section, select **“Generate New Report”**.
- Under **“Select Timeframe of Information to Include”**, choose **“Current Year”**.
- Under **“Select Properties to Include”**, select **“All Properties”**.
- Click **“Generate Spreadsheet”**.
- You will return to the **“Reporting”** webpage and see the notice ‘Your report “Partner of the Year Report” is being generated.’ The report generation will only take a moment. You may need to refresh your web browser to see the status change from **“Preparing Report”** to **“Generated”**.
- Under the **“Action”** column, in the **“I want to…”** section, select **“View Current Report”**.
- You will now see the most recent version of the **“Partner of the Year Report”**. The data will be displayed in your web browser. You will also be provided with the option to export the data to an Excel spreadsheet.
- To export the report data to an Excel spreadsheet, click **“Download Report”**.
- The spreadsheet will be saved in your computer’s Download’s folder similar to the Properties upload spreadsheet from step 2.

9. Final Notes

The primary piece of information that will be reported from Portfolio Manager will be each property’s Site Energy Use (kBtu) and Site Energy Use Intensity (EUI), which is automatically calculated by Portfolio Manager given the property information (square footage) and the uploaded energy usage data. Please note that this calculation will be inaccurate if the non-metered data requiring manual upload from step #6 is not entered. The District will have complete access and control over all information that is uploaded to Portfolio Manager. All of their information can be viewed or edited from their account.

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Be sure that all of your properties are shared with the **California Community College Chancellor's Office (CCCCO)** account.

Portfolio Manager software is capable and useful with many resources to help the California Community Colleges with their implementation of Proposition 39 state funding. Using the software will enable simple and useful data tracking and reporting to the Citizen's Oversight Board.

10. Additional Resources

[Portfolio Manager's Log-in Page](#)

[Portfolio Manager Training Resources](#)

[Benchmarking Help](#)

Contact Information:

benchmarking@eefg.com

415-814-3744

[Energy Performance Benchmarking - PG&E](#)

[How to Benchmark your Building - PG&E](#)

[Benchmark Your Building's Energy Use - SCE](#)

[A Step-by-Step Guide to Benchmarking - SCE](#)

[Benchmarking Help - SCG](#)

[Portfolio Manager Web Services Authorization - SCG](#)

[How to Benchmark - SCG](#)

[Benchmarking with Portfolio Manager - SDG&E](#)

[Benchmarking Step-by-Step Guide - SDG&E](#)