

GSA Carbon Footprint Tool Energy Star Portfolio Manager Import Process

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Introduction

Importing data from the Energy Star Portfolio Manager into the Carbon Footprint Tool (CFT) allows organizations to view and compare building usage, renewable energy, and greenhouse gas (GHG) data from a centralized location. This guide is intended for organizations that already use Energy Star's Portfolio Manager. If your agency does not use Portfolio Manager, you can enter data directly into CFT, without going through Portfolio Manager. For more information on using Portfolio Manager, see <https://portfoliomanager.energystar.gov>.

The major steps of the Portfolio Manager import process are:

1. Establish a connection between Portfolio Manager and CFT
2. Share Portfolio Manager sites with CFT
3. Match Portfolio Manager sites with CFT sites
4. Import Portfolio Manager meter data

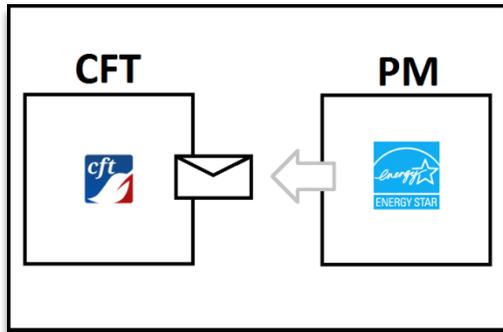
You have the option of importing Portfolio Manager meter data three ways:

- All sites for a single year
- A group of sites for all years
- An individual site for all years

This guide also covers how to view imported meter data, disconnect Portfolio Manager accounts, and disconnect individual sites from Portfolio Manager.

NOTE: In order to follow this process to import your Portfolio Manager data into CFT, you must be an Organization Administrator in CFT (NOTE: this is not the same as a Site Administrator).

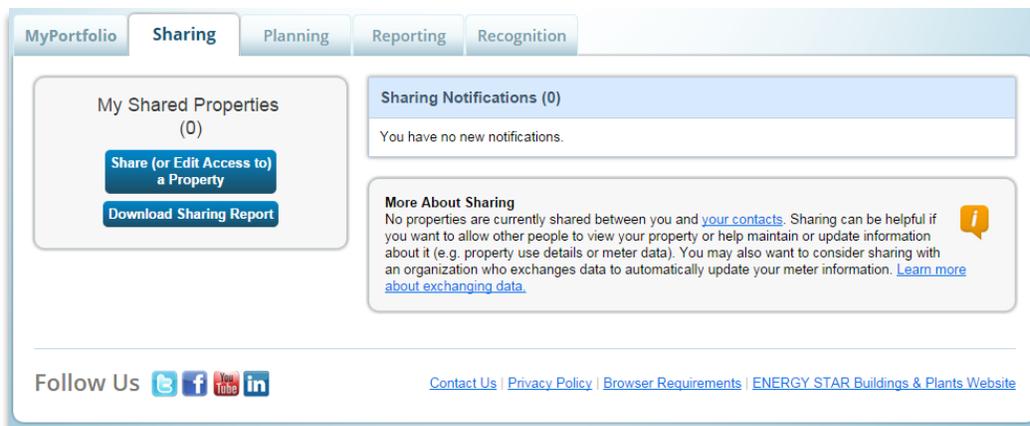
Step 1: Establish Connection Between Portfolio Manager and CFT



Log in to your Energy Star Portfolio Manager account: <https://portfoliomanager.energystar.gov>

Click on the “Sharing” tab within Portfolio Manager.

Then click on the “Share (or Edit Access to) a Property” button:



You should then see the following screen:

MyPortfolio **Sharing** Planning Reporting Recognition

Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.

- 1 Select Properties**

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

- Select Number of Property(ies) -
- 2 Select People (Accounts)**

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your **connected contacts** appear in this list.
- 3 Choose Permissions**

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

I am doing a single share OR I want to choose the same permissions for all of my share requests.
 I need to give different permissions for different share requests, and/or I need to give Exchange Data permissions.

Sharing with Accounts

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Add Contact" or "Add Organization" page and search for them within Portfolio Manager (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. After they accept your connection request, they will show up on the list to the left.

Exchanging Data

To get started, first connect with an [organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left. **Note, you cannot share in bulk for "exchange data."**

Who gets to Share Forward?

Full Access - Automatically includes "Share Forward" rights
Read Only - Automatically does NOT include "Share Forward" rights
Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
Data Exchange - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Continue [Cancel](#)

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Click the link in the right column under the "Exchanging Data" section called "organization that exchanges data":

Exchanging Data

To get started, first connect with an [organization that exchanges data](#). Once you are connected, their name will appear on the selection list on the left. **Note, you cannot share in bulk for "exchange data."**

This will take you to a page where you can search for, and send a connection request to, the Carbon Footprint Tool.

In the “Find Contact in Portfolio Manager” box, search for the username “carbonfootprinttool”:

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.

Find Contact in Portfolio Manager

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 Personal Contacts

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

Organizing Personal Contacts by Organization

On the right side, click the “Connect” button next to “GSA Carbon Footprint Tool”:

Search Results

The results of your search are listed below. Clicking “Connect” will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

Search

GSA Carbon Footprint Tool
GSA Carbon Footprint Tool API with GSA Carbon Footprint Tool **Connect**

Page 1 of 1

The next page will require you to agree to the Terms of Use. Once you have read and agreed to the Terms of Use, click “Send Connection Request”:

Send a Connection Request to [GSA Carbon Footprint Tool](#) to Begin Exchanging Data

[GSA Carbon Footprint Tool](#) requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [GSA Carbon Footprint Tool](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use:

The GSA Carbon Footprint Tool is owned and operated by the United States General Services Administration (GSA). By agreeing to these Terms of Use, you authorize read-only access of your agency's facilities, campuses, buildings, and meters for the purpose of transferring site attribute data (e.g., physical address) and energy consumption data from EPA Portfolio Manager to the GSA Carbon Footprint Tool via EPA Portfolio Manager's Automated Benchmarking System (ABS) web services. The GSA Carbon Footprint Tool will not be granted access to change any EPA Portfolio Manager data, and only authorized users of the GSA Carbon Footprint Tool within your agency will have access to view this data.

Agreement: I agree to my provider's ([GSA Carbon Footprint Tool](#)) Terms of Use.

[Send Connection Request](#) [Cancel](#)

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Once you have sent the connection request you will receive a confirmation message:

You have successfully sent a connection request to The GSA Carbon Footprint Tool. When The GSA Carbon Footprint Tool has accepted your request, you will be able to share properties and, therefore, authorize this provider to begin exchanging data with your property(ies).

This confirmation message means that you have successfully sent a connection request to the Carbon Footprint Tool. You will need to wait for the Carbon Footprint Tool administrators to finalize the connection before you can share any property or meter data. You will receive a confirmation email from the Carbon Footprint Tool letting you know when the connection has been established.

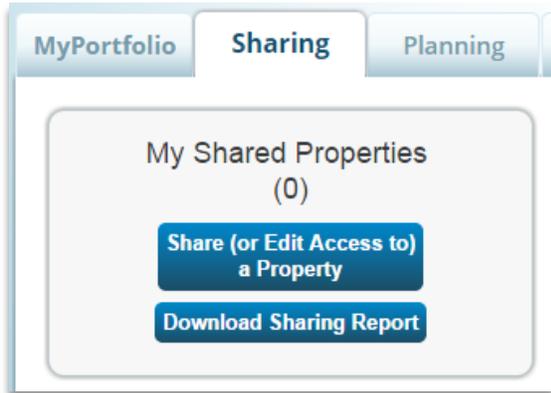
If your connection request is rejected, please repeat the above process to send another connection request.

A connection must be established before moving to Step 2.

Step 2: Share Portfolio Manager Sites with CFT

Once you receive an email confirming your connection to the Carbon Footprint Tool, you can then share your property data.

From your Portfolio Manager account, return to the “Sharing” tab and select “Share (or Edit Access to) a Property” again:

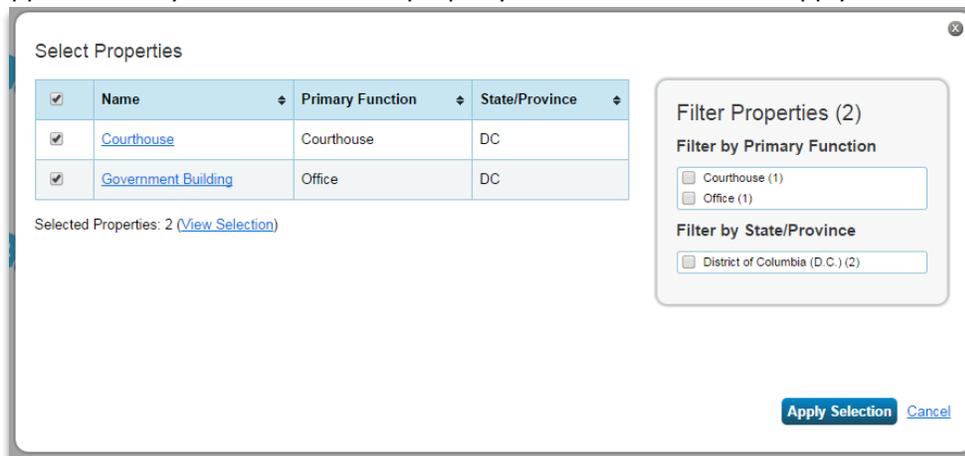


Under “Select Properties” on the following page, select whether you want to share one property, multiple properties, or all your properties:



If you select “One Property”, you will need to select a property from a drop down list.

If you select “Multiple Properties”, you will need to click the “Select Properties” button. A popup will appear where you can select each property on the left side. Click “Apply Selection” when done.



Under “Select People (Accounts), choose “Carbon Footprint Tool, GSA”:

Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

Carbon Footprint Tool, GSA

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.

Finally, under Choose Permissions, select the second option. You must select this option because you need to Exchange Data with CFT.

Choose Permissions

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

* I am doing a single share OR I want to choose the same permissions for all of my share requests.

I need to give different permissions for different share requests, and/or I need to give Exchange Data permissions.

Then click then “Continue” button.

You will then be shown the permissions selection chart. Select the Exchange Data radio button on the right for each property.

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Sort by: Property Name

Who gets to Share Forward?

- Full Access** - Automatically includes "Share Forward" rights
- Read Only** - Automatically does NOT include "Share Forward" rights
- Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
- Data Exchange** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
<ul style="list-style-type: none"> Courthouse (4160260) <ul style="list-style-type: none"> GSA Carbon Footprint Tool 	<input type="radio"/>				
<ul style="list-style-type: none"> Government Building (4156570) <ul style="list-style-type: none"> GSA Carbon Footprint Tool 	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Share Property(ies) [Cancel](#)

This will provide a pop-up asking you to select the level of access permissions. Select the “Read Only Access” radio button for “Property Information” and all meters. CFT does not require access to “Goals, Improvements, & Checklists” or “Recognition” so you do not need to share these items.

Select Exchange Data Access Permissions to [Government Building](#) for [GSA Carbon Footprint Tool](#).

[GSA Carbon Footprint Tool](#) requires the following information in order to provide services to your property(ies). If you have any questions about how to complete this information, please contact [GSA Carbon Footprint Tool](#).

Please select the permission level you would like to grant [GSA Carbon Footprint Tool](#) for [Government Building](#) for each category. If "None" is selected for all items, [GSA Carbon Footprint Tool](#) will not receive any access to this property.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
▼ All Meter Information			
Electric Grid Meter	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Potable: Combined Indoor/Outdoor or Other Meter	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Goals, Improvements, & Checklists	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Recognition	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Apply Selections & Authorize Exchange](#) [Cancel](#)

If you scroll down, you will see an option called “Share Forward”. CFT does not require this functionality.

Additional Options:

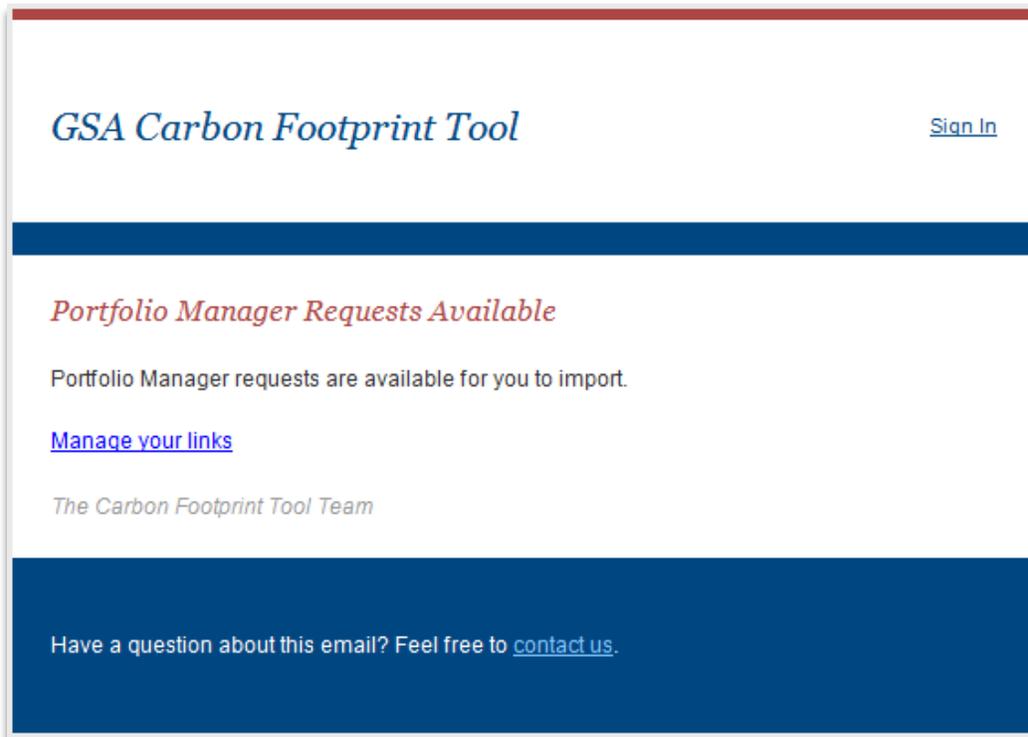
Item	Yes	No
Share Forward Allow GSA Carbon Footprint Tool to share this property with others and give them any permissions that he/she has, including the right to share with more people.	<input type="radio"/>	<input type="radio"/>

Click the “Apply Selections & Authorize Exchange” button to save your selections.

Once you have addressed each facility, finalize the sharing request by clicking the “Share Property(ies)” button. You will then be taken back to the sharing page and shown a confirmation message stating that you have successfully edited the sharing permissions:

You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.

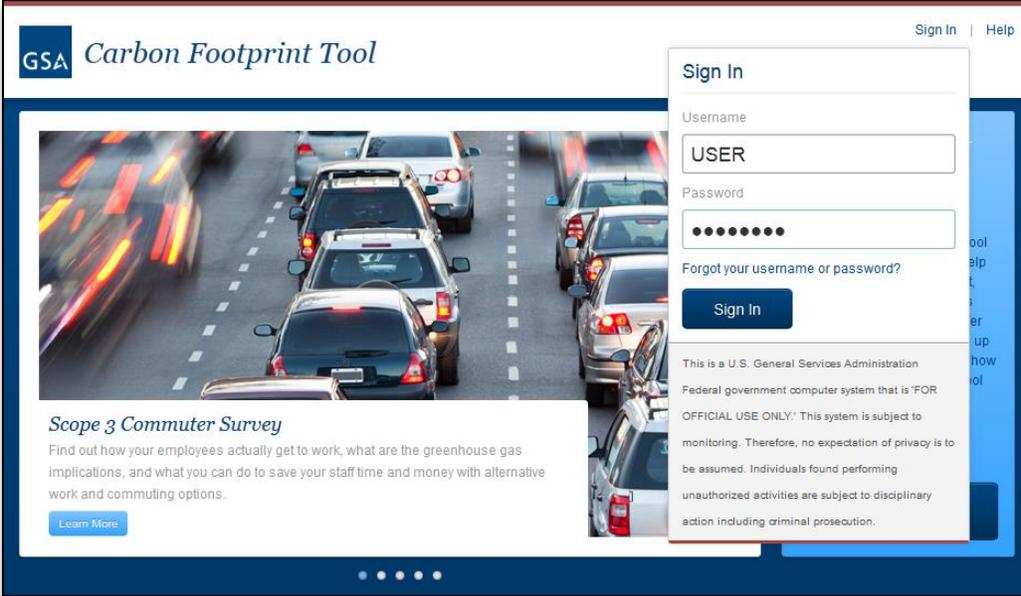
You will be sent a confirmation email from CFT when the Import Authorization Request has been approved:



If your first connection request is rejected, please repeat the above process to send another connection request from your Portfolio Manager account.

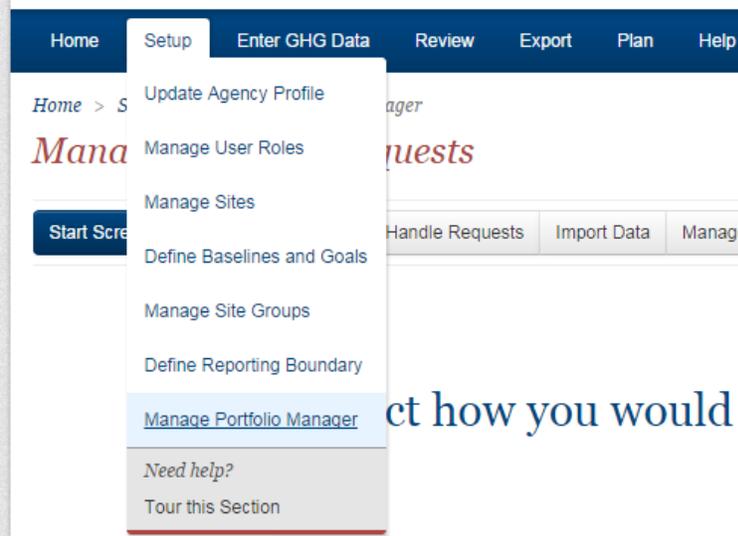
Proceed to Step 3 once you have received the confirmation email.

Step 3: Match Portfolio Manager Sites with CFT Sites

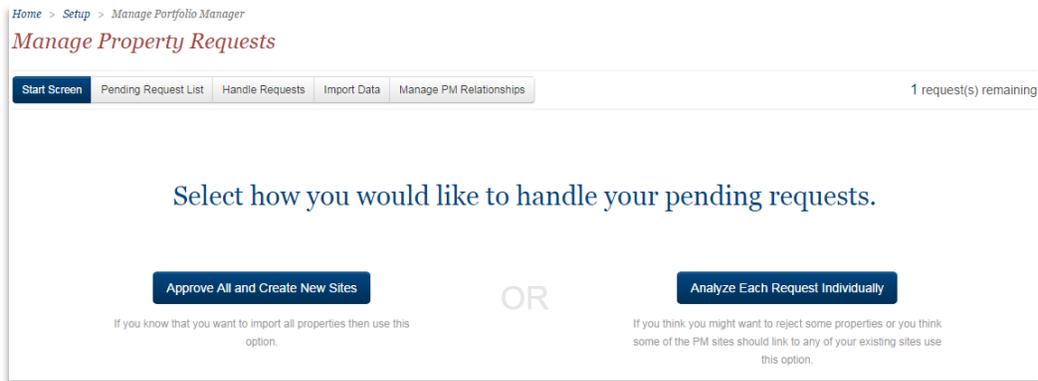


Sign into the Carbon Footprint Tool: <https://www.carbonfootprint.gsa.gov>

Under the “Setup” tab, go to “Manage Portfolio Manager”:

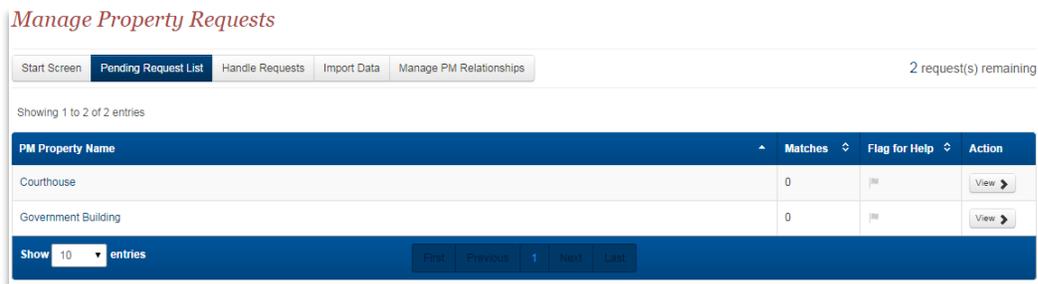


You can then either “Approve All and Create New Sites” or “Analyze Each Request Individually”:



If you click the “Approve All and Create New Sites” button, new sites will be created in the CFT for each of the Portfolio Manager properties and you will receive an email from CFT when the process has finished.

If you choose to “Analyze Each Request Individually, you will be directed to a page showing all pending properties from Portfolio Manager (the “Pending Request List” tab will direct you to the same page):



Under the “Action” column on the right side, select “View” next to the first property.

You will then see a screen with information from Portfolio Manager on the left and from CFT on the right. CFT will automatically pull a property matching the Portfolio Manager data if one is available. The page will display whether each field matches in the center. If the property isn't a good match, you can use the arrows on either side of the "Carbon Footprint Tool" box heading to scroll through all matching CFT sites.

The screenshot shows a comparison interface between Portfolio Manager and Carbon Footprint Tool (CFT). At the top, there are navigation tabs: "Start Screen", "Manage PM Relationships", "Pending Request List", and "Handle Requests". On the right, it says "5 request(s) remaining". Below the tabs, there is a "Flag for Help" link and "Viewing match 1 of 6".

Portfolio Manager	Match	Carbon Footprint Tool
Portfolio Manager Property		CFT Site
PENDING METERS	✖ Bad Match	EXISTING METERS Site has no meters.
ADDRESS 3150 Fairview Park Dr	✔ Match	ADDRESS 3150 Fairview Park Dr
CITY Falls Church	✔ Match	CITY Falls Church
STATE VA	✔ Match	STATE VA
ZIP 22042	✔ Match	ZIP 22042
COUNTRY US	✖ Bad Match	COUNTRY United States
SPACE TYPE K-12 School	✔ Match	SPACE TYPE K-12 School
SQUARE FOOTAGE 123456	✔ Match	SQUARE FOOTAGE 123456

At the bottom, there are several buttons: "✖ Reject Property", "Contact PM Account Holder", "Match Grade: Very Good", "Skip Property", and "✔ Accept".

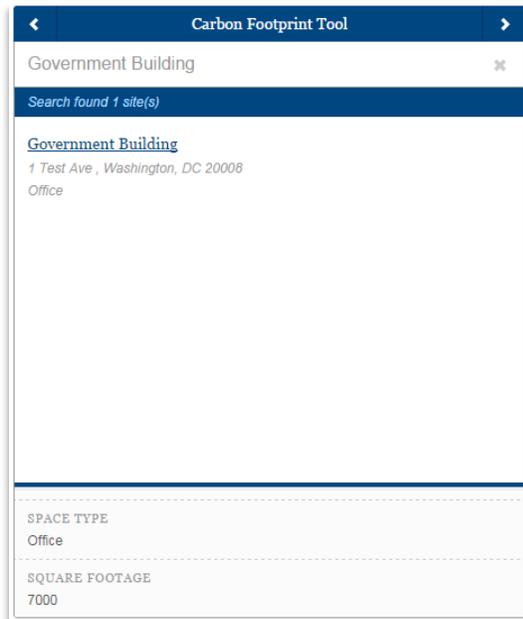
If CFT cannot find any matching properties, it will suggest that you create a new site:

The screenshot shows the same comparison interface as above, but with a "Create New Site" suggestion. The Portfolio Manager data is for a "Government Building" at "1 Test Ave", Washington, DC, 20008, USA, Office space, 7000 sq ft. The CFT side shows "Create New Site" and "EXISTING METERS: Site has no meters." The match status for all fields is "N/A".

Portfolio Manager	Match	Carbon Footprint Tool
Government Building		Create New Site
PENDING METERS		EXISTING METERS Site has no meters.
ADDRESS 1 Test Ave	⊘ N/A	<p>Create New Site</p> <p>Using the data from Portfolio Manager we will create a new site in the Carbon Footprint Tool.</p>
CITY Washington	⊘ N/A	
STATE DC	⊘ N/A	
ZIP 20008	⊘ N/A	
COUNTRY US	⊘ N/A	
SPACE TYPE Office	⊘ N/A	
SQUARE FOOTAGE 7000	⊘ N/A	

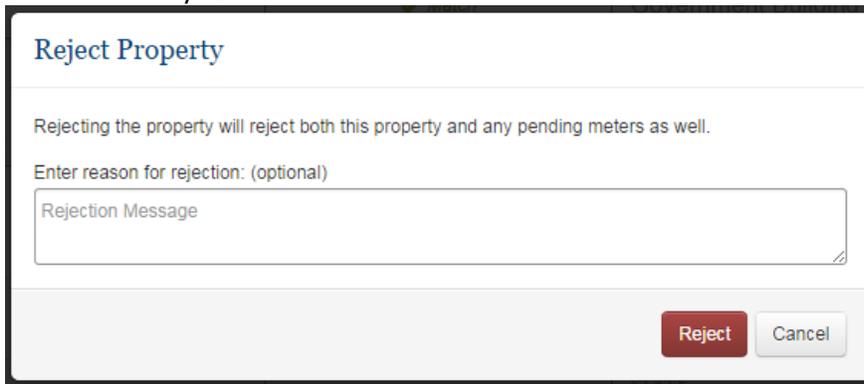
At the bottom, there are buttons: "✖ Reject Property", "Contact PM Account Holder", "Match Grade: N/A", "Skip Property", and "✔ Accept".

If the correct CFT site does not appear, you can click in the box directly below “Carbon Footprint Tool” and type in the name of the building to search CFT. Click on the resulting site to select it. NOTE: The “Space Type” must match in order to select the site.



At the bottom of the page, you have the option to Accept, Skip, or Reject a pending import.

If you choose to Reject a pending import (such as a duplicate entry), you will be presented with a popup asking for a description as to why the import is being rejected (optional). Once you click “Reject”, the site and its associated meters will be removed from the import list and the number of pending imports will decrease by “1”.



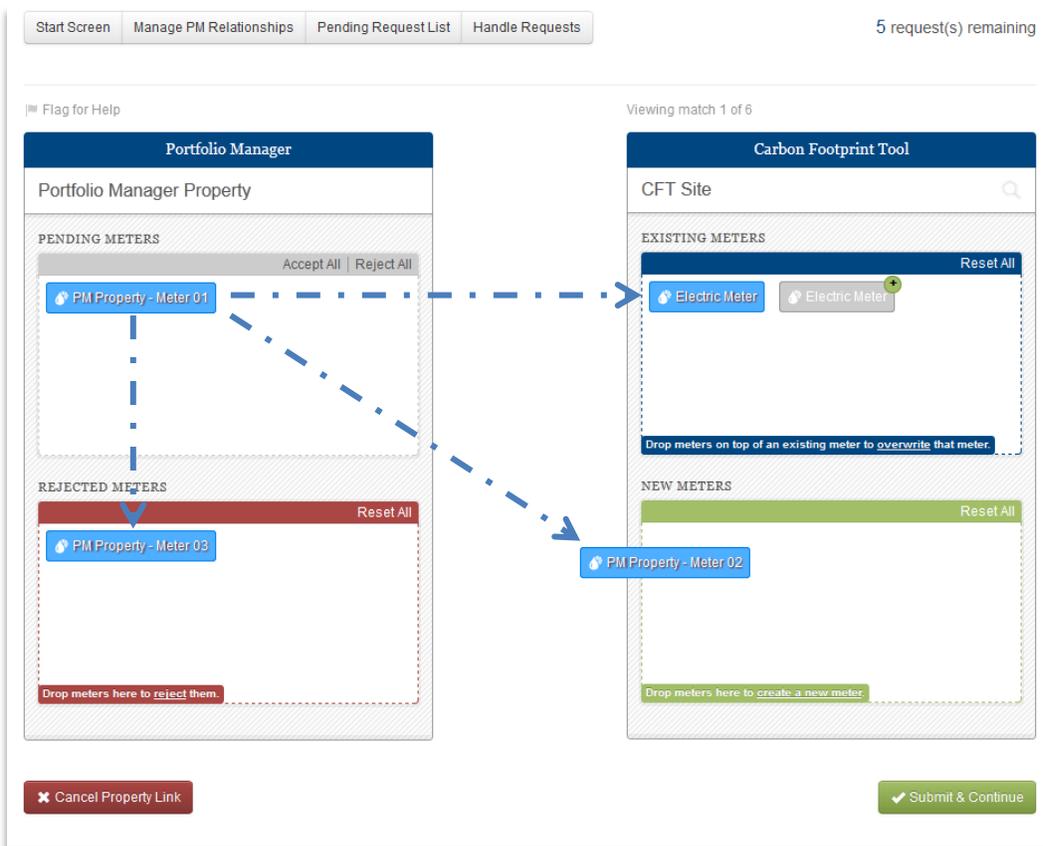
If you are unsure of a pending request, you can click the Skip button. The property request the pending import will not be removed from the list, it will simply be sent to the bottom of the list for later review. You will then be shown the next property request in the list.

If you choose to Accept a match, a popup will appear asking you to confirm the link. The “Link and overwrite” option will not only link the Portfolio Manager property to the Carbon Footprint Tool site, but it will also overwrite the CFT site information with the PM property information (keep left side information). The “Link and Do Not Overwrite” option will link the CFT site with the PM property, but it

will leave the CFT site information intact (keep right side information). Select the most appropriate option for the site.

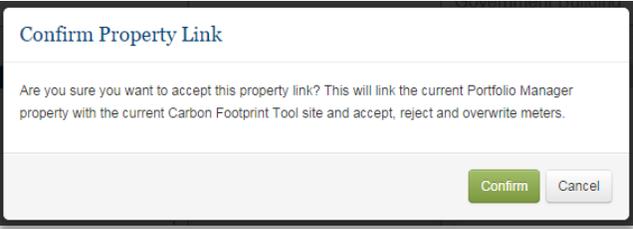


You will then be presented with a page with boxes for pending, removed, existing, and new meters:



You must address all the pending meters. To accept a meter, drag it to the right side. If you drag it on top of an Existing meter, it will replace that meter in CFT. If you drag it to the "New Meters" box, it will become a new meter in CFT. To remove a meter, drag it to the "Rejected Meters" box. Note that any water meters will automatically be rejected because CFT does not use this information.

Once you have addressed all pending meters, click "Submit & Continue". You will then be asked to confirm the property link:



After clicking “Confirm”, you will be directed to the next property and the number of requests remaining will decrease by “1”.

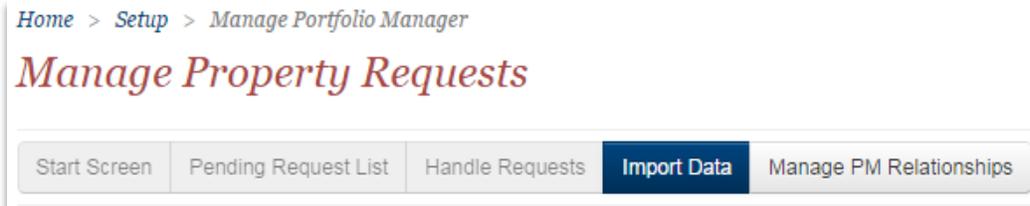
Once you have addressed all pending properties, move to Step 4.



Step 4: Import All Portfolio Manager Meter Data for a Single Year

For your first time importing data from Portfolio Manager or you need to import an entire year, follow this step. If you have already imported data and only need to update particular sites, see Step 4.

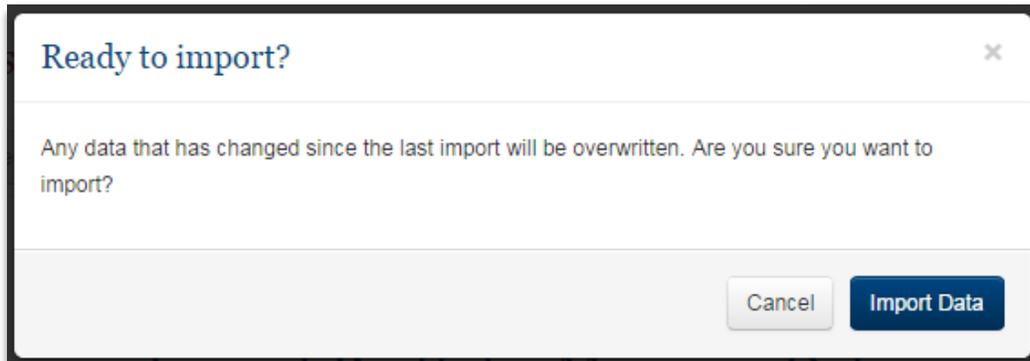
From within the “Manage Portfolio Manager” page, click the “Import Data” tab:



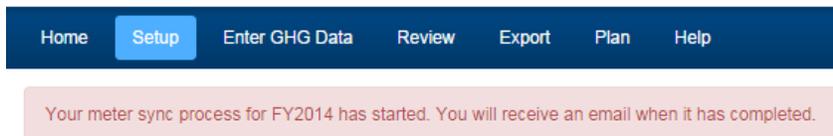
Select a year from the drop down and click “Import”:



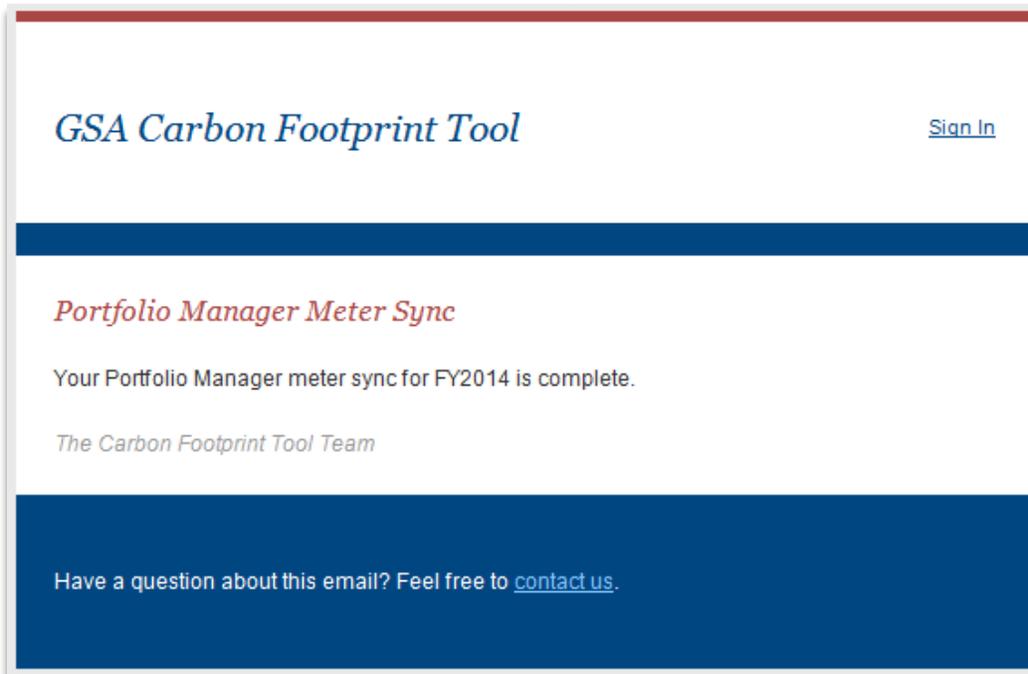
You will see a popup warning you that any data that has changed will be overwritten. If this is your first import, click “Import Data”. Otherwise, analyze if any data has changed before making a decision.



You will then receive a message that the sync has started:



You will receive a confirmation email when the sync is complete:



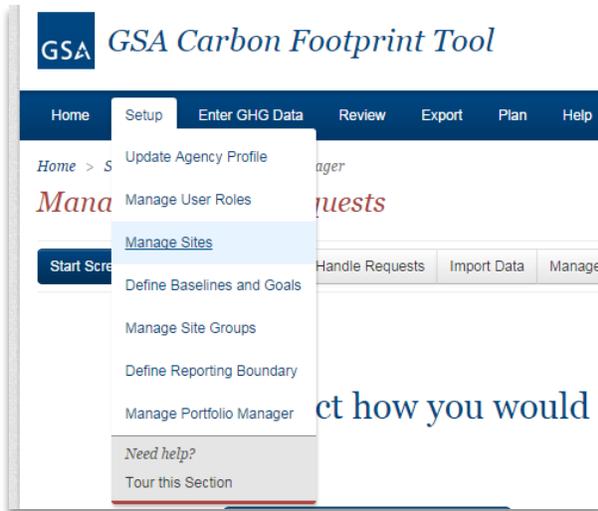
After you receive confirmation, data for the year selected should appear for each site.

Step 4: Import All Portfolio Manager Meter Data for Selected Sites

If you have already imported information from Portfolio Manager and need to update the data for a limited number of sites, you can do a batch or individual site sync. This process will update all years.

Batch Operation Sync

To do a batch sync, click on “Manage Sites” under the “Setup” tab:

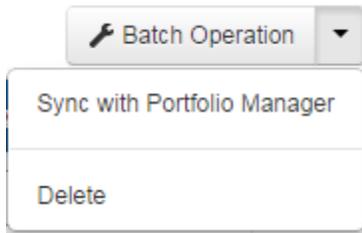


This will allow you to view a list of all sites. Sites linked to Portfolio Manager are indicated with blue dots by the site name:

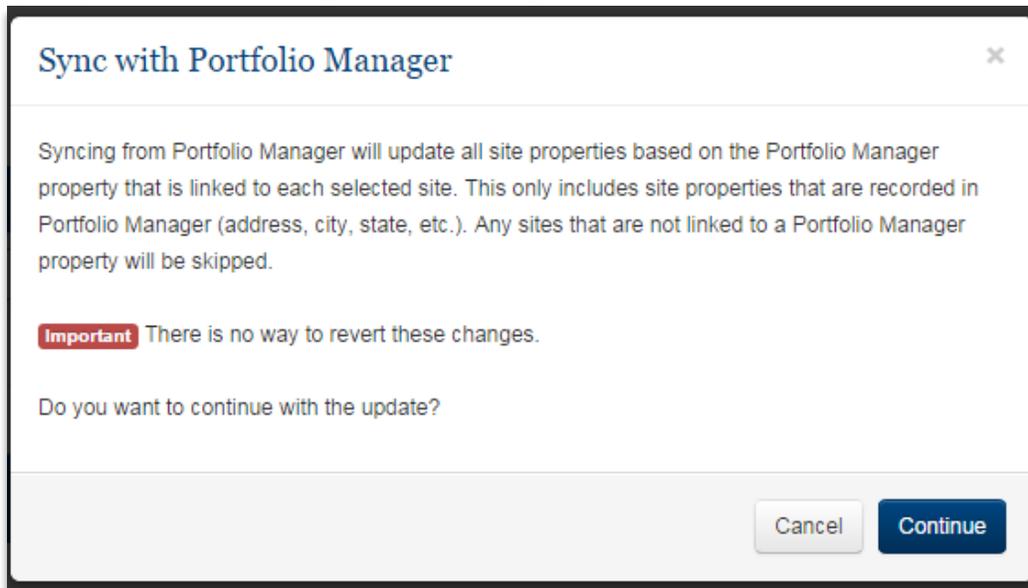
The screenshot shows the 'Manage Sites' table. The table has columns: Dept/Bureau, Site Group, Name, and Building Type. The table contains 11 entries. Sites linked to Portfolio Manager are indicated by blue dots next to their names. The table also includes a 'Batch Operation' button and a 'Showing 1 to 10 of 11 entries' indicator.

Dept/Bureau	Site Group	Name	Building Type	
Noblis Test Organization - PM testing	No Site Group	Portfolio Manager Property 01	Adult Education	<input type="checkbox"/>
Noblis Test Organization - PM testing	No Site Group	CFT Site 01	Office	<input checked="" type="checkbox"/>
Noblis Test Organization - PM testing	No Site Group	Bank Branch	Bank Branch	<input type="checkbox"/>
Noblis Test Organization - PM testing	No Site Group	Portfolio Manager Property 02	Adult Education	<input type="checkbox"/>
Noblis Test Organization - PM testing	No Site Group	Portfolio Manager Property 03	Adult Education	<input type="checkbox"/>
Noblis Test Organization - PM testing	No Site Group	CFT Site 02	K-12 School	<input type="checkbox"/>
Noblis Test Organization - PM testing	No Site Group	Portfolio Manager Property 04	K-12 School	<input checked="" type="checkbox"/>
Noblis Test Organization - PM testing	No Site Group	CFT Site 03	K-12 School	<input type="checkbox"/>
Noblis Test Organization - PM testing	No Site Group	CFT Site 04	K-12 School	<input checked="" type="checkbox"/>
Noblis Test Organization - PM testing	No Site Group	Portfolio Manager Property 05	K-12 School	<input type="checkbox"/>

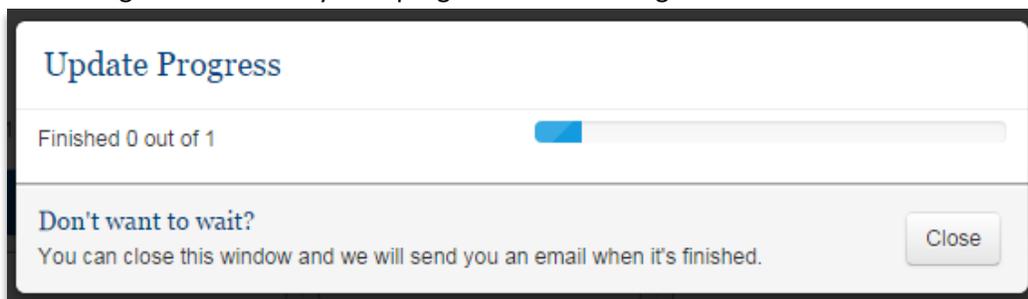
Select the checkboxes on the right for the sites to be synced with Portfolio Manager. Then click on “Batch Operation” and select “Sync with Portfolio Manager”:



A popup will appear warning that these changes are irreversible. Click “Continue”.



Another popup will then appear showing the update progress. It will also display when imports have failed and give a reason why. The progress bar will turn green when finished.

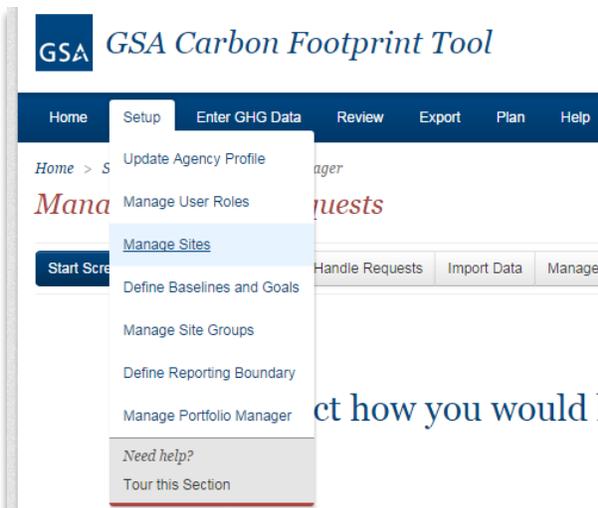


You can decide to leave the popup open until the sync process has completed, or you can close it and work on other things within the CFT while the import process continues in the background. CFT will send you an email with a sync summary when it is complete:



Individual Site Sync

An individual sync also starts from the “Manage Sites” page under the “Setup” tab:



Click on the site name to enter the page for the specific site. You can then click the “Sync” button on the right side to sync data with Portfolio Manager for only that site:

Portfolio Manager Property

Site Information

Site Property	Value
Dept/Bureau	Federal Agency
Address	3150 Fairview Park Dr Falls Church, VA 22042 United States
Building Type	K-12 School
Year Built	1980
Ownership	
Classification	Agency owned and controlled
Lease Type	
Total Building Area	123,456 sq. ft.
Occupied Area	123,456 sq. ft.
Staff Total	1 employees
Operating Days per Week	7
Average Hours per Day	24
Number of Work Days per Fiscal Year	365

Site Status

Site Property	Value
LEED Green Certification	None
ENERGY STAR Certified	No
Meets Guiding Principles	No
EISA Goal Subject or Excluded	Subject
GHG Target Included or Excluded	Included

Data Sources
Select which sources to use for this site.

Portfolio Manager [linked](#)

REXUS not linked

A popup will appear asking you to confirm the sync:

Confirm Action

Are you sure you want to **sync** this site with it's Portfolio Manager property?

Once you click “Continue”, the data will sync and a confirmation will appear at the top of the page:

Home
Setup
Enter GHG Data
Review
Export
Plan
Help

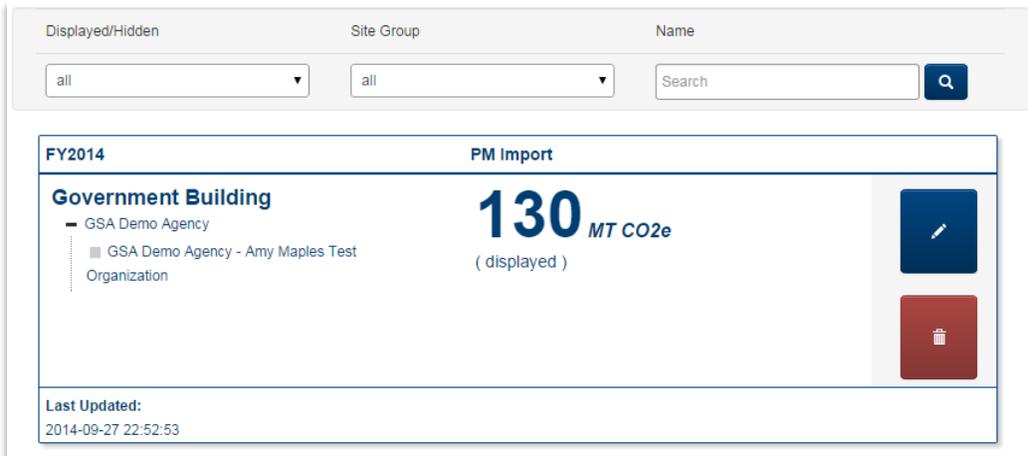
Government Building updated successfully.

Step 5: View Imported Meter Data

You can view the data imported from Portfolio Manager by going to “Manage Data” under the “Enter GHG Data” tab:



Select the correct year on the right then scroll to the bottom of the page to see a listing of all buildings that contribute to the emissions calculations:



Click the blue button with the pencil to view detailed information

Click on any relevant fields on the left to view data imported from Portfolio Manager. Note that you cannot edit this data.

Home > Enter GHG Data > View/Edit GHG Data (admin) > Analyzer

PM Import Data Entry Complete

GOVERNMENT BUILDING

Read Only. This scenario is currently locked or under QA review. No changes to the data can be made at this time.

Total Emissions FY 2014

130

metric tons CO₂e

Legend

● No Data ● In Progress ● Complete

Scope 1

- Combustion
- Fugitive Emissions
- Industrial Process Emissions

Scope 2

- Purchased Electricity
 - Building Electricity Emissions 121.85
 - Utility Data Available
 - Monthly Consumption
 - Data Center
 - IT Equipment
- Purchased Steam, Hot Water, and Chilled Water
 - Purchased Steam, Hot Water, and Chilled Water
- Purchases from Combined Heat and Power (CHP)

Purchased Electricity > Building Electricity

Monthly Consumption

Federal GHG Accounting and Reporting Guidance
 Analyzer Calculations and Assumptions

Select Emission Source ?

Electric Grid Meter Create Meter

Select unit for input

kWh (thousand watt hours)

Enter the energy used and cost for each month. The cost per unit for each month, total energy used, total cost, and total cost per unit will be calculated for you.

	Consumption <i>kWh (thousand watt hours)</i>	Cost <i>dollars</i>	Cost per unit <i>dollars</i>
October	<input type="text" value="10000"/>	\$ <input type="text" value="5000"/>	\$ <input type="text"/>
November	<input type="text" value="13000"/>	\$ <input type="text" value="6500"/>	\$ <input type="text"/>
December	<input type="text" value="16000"/>	\$ <input type="text" value="8000"/>	\$ <input type="text"/>

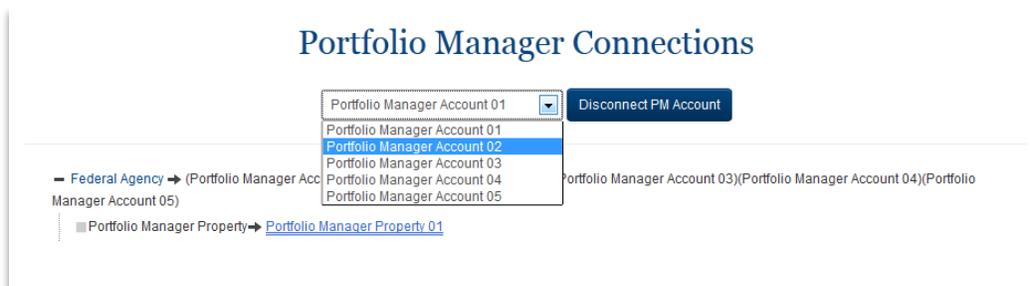
Step 6: Disconnect Portfolio Manager Accounts

If you need to disconnect a Portfolio Manager account (such as connecting to the wrong organization), follow this step. This will remove the connection between the Carbon Footprint Tool and Portfolio Manager. Note that all of the sites that you created when linking with Portfolio Manager and all meter data will remain in CFT. You will simply no longer be able to sync with Portfolio Manager.

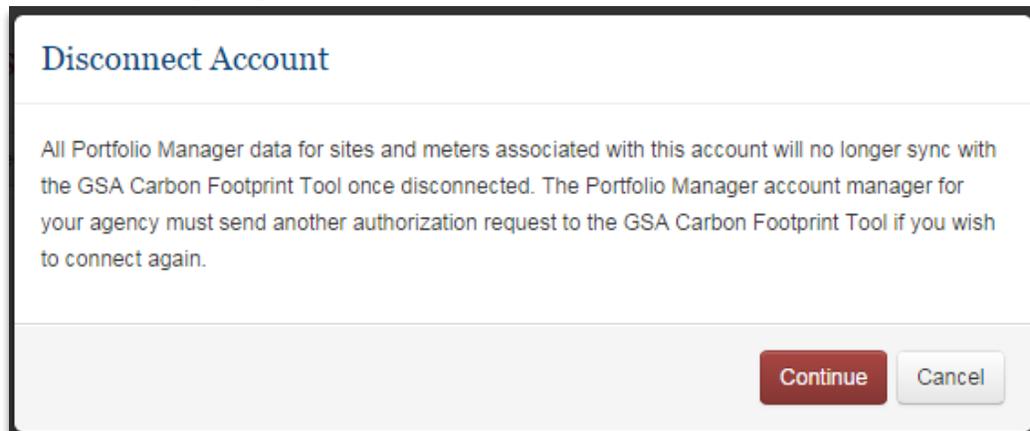
Go to “Manage Portfolio Manager” under the “Setup” tab. Click on “Manage PM Relationships”:



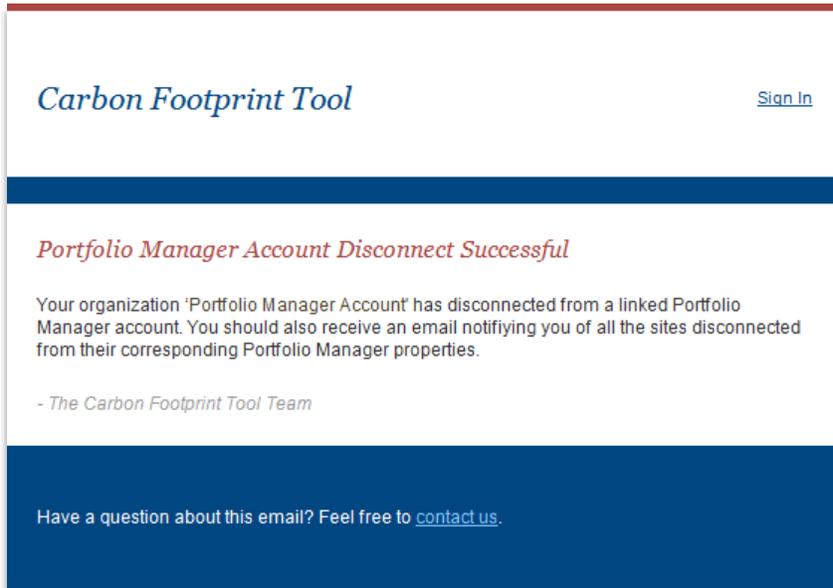
You can then select an account and click “Disconnect PM Account”.



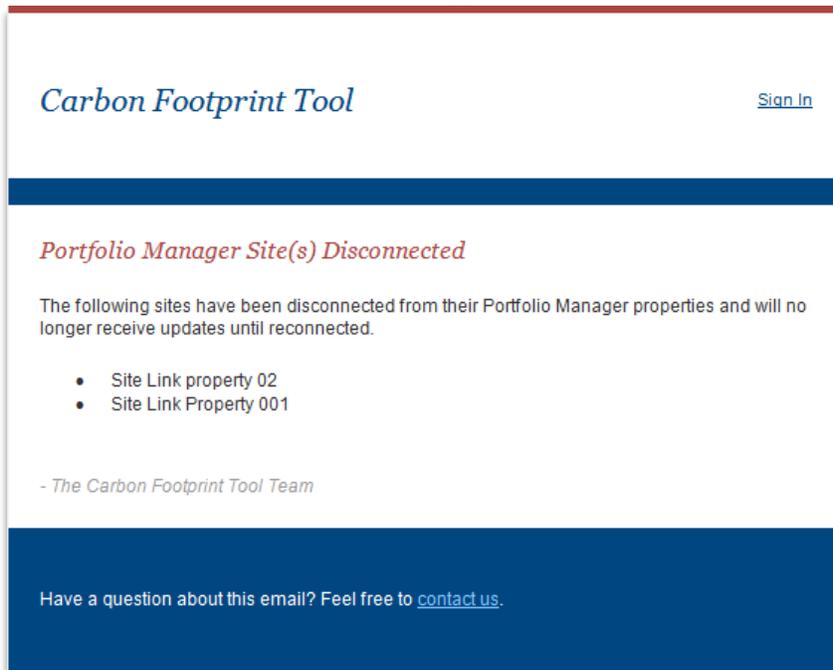
You will then be prompted to confirm the disconnection:



After you click “Continue”, you will receive an email confirming that the disconnect process was successful:



You will also receive an email displaying which sites have been disconnected from Portfolio Manager:



Step 7: Disconnect Sites from Portfolio Manager

If you need to disconnect a specific site from Portfolio Manager, follow this step. Once a site is disconnected, the Portfolio Manager data that is currently on the Carbon Footprint Tool will remain. However, you will no longer be able to sync the site with data from the Portfolio Manager.

Click on the “Manage Sites” page under the “Setup” tab. Then click on the name of the site you want to disconnect.

On the right side of the page, click on “Disconnect” on the “Portfolio Manager” line:

Portfolio Manager Property

Site Information

Site Property	Value
Dept/Bureau	Federal Agency
Address	3150 Fairview Park Dr Falls Church, VA 22042 United States
Building Type	K-12 School
Year Built	1980
Ownership	
Classification	Agency owned and controlled
Lease Type	
Total Building Area	123,456 sq. ft.
Occupied Area	123,456 sq. ft.
Staff Total	1 employees
Operating Days per Week	7
Average Hours per Day	24
Number of Work Days per Fiscal Year	365

Site Status

Site Property	Value
LEED Green Certification	None
ENERGY STAR Certified	No
Meets Guiding Principles	No
EISA Goal Subject or Excluded	Subject
GHG Target Included or Excluded	Included

Data Sources

Select which sources to use for this site.

Portfolio Manager [linked](#)

REXUS not linked

You will then be prompted to confirm the disconnection:

Confirm Action

Are you sure you want to **disconnect** this site from its Portfolio Manager property?

*Disconnecting a site not only removes the link between Portfolio Manager and this site but it will also disconnect all the site's Portfolio Manager meters as well. The site's data that is currently in the Carbon Footprint Tool will **NOT** be altered in any way.*

Click “Continue” to disconnect.