

GSA Carbon Footprint Tool

Instructions for Importing Data from Energy Star Portfolio Manager

Table of Contents

Definitions	3
Purpose of This Guide.....	4
Part 1a: Initiate Data Sharing	4
Step 1: Get Started.....	5
Step 2: Select Current Energy Provider.....	6
Step 3: Select the Facilities/Campuses to Authorize	7
Step 4: Authorize Facilities/Campuses	8
Step 5: Review Confirmation Message and Existing Providers List	9
Part 1b: Share Additional Data after Initiation.....	10
Step 1: Start Change of Authorization Process	10
Step 2: Select Additional Facilities/Campuses to Authorize	11
Part 2: Import Energy Star Portfolio Manager Data	12
Step 1: Import Portfolio Manager Data	12
Step 2: Review Sites and Scenarios.....	13
Part 3: Refresh Energy Star Portfolio Manager Data	14

Definitions

Automated Benchmarking Service (ABS): To more easily assess and rate the energy performance of your building portfolio, EPA developed automated benchmarking as a way for energy service providers (ESPs) to exchange energy consumption data with Energy Star Portfolio Manager. ABS also allows ESPs to access the EPA ENERGY STAR energy performance scale, a rating from 1 to 100, for the facility based on its energy efficiency. The Carbon Footprint Tool uses this platform to communicate with Energy Star Portfolio Manager to download energy consumption data and building ratings. For more information on ABS, see http://www.energystar.gov/index.cfm?c=spp_res.pt_spps_automated_benchmarking

Energy Star Portfolio Manager Account Manager (PM Account Manager). This person is the designated point of contact for controlling the agency's data within Energy Star Portfolio Manager. Every agency should have at least one Energy Star Portfolio Manager Account Manager who can initiate the approval process within Portfolio Manager to share data between Portfolio Manager and The Carbon Footprint Tool as outlined in Part 1a and 1b of these instructions.

GSA Carbon Footprint Tool Account Administrator (CFT Administrator). This person is the designated point of contact that manages how data is stored within the Carbon Footprint Tool. Every agency should have at least one GSA Carbon Footprint Tool Account Administrator who can initiate the transfer of data from within the GSA Carbon Footprint Tool as outlined in Part 2 and 3 of these instructions. More information on the roles and responsibilities of the CFT Administrator can be found in Chapter 1 of The GSA Carbon Footprint Tool User Guide.

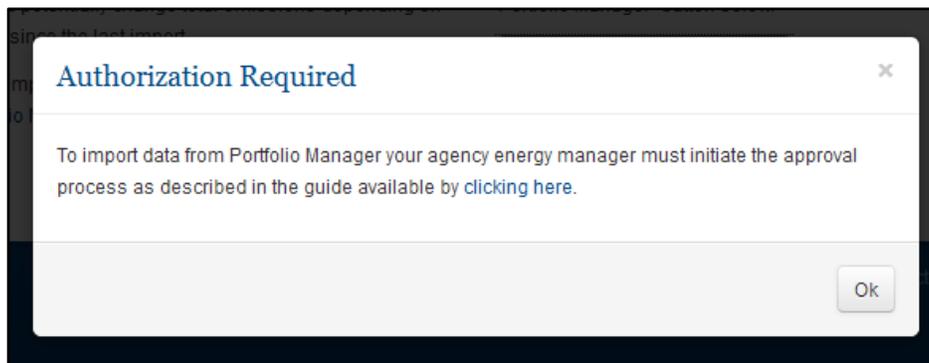
Purpose of This Guide

The GSA Carbon Footprint Tool can import building energy usage data (including purchased electricity and on-site fossil fuel combustion) directly from Energy Star Portfolio Manager to streamline Executive Order (EO) 13514 requirements for greenhouse gas (GHG) reporting. This guide outlines the steps required to authorize and initiate the transfer of data from Energy Star Portfolio Manager to the GSA Carbon Footprint Tool.

Part 1a: Initiate Data Sharing

The Energy Star Portfolio Manager Account Manager must initiate an approval process before any data can be shared between the two tools. This step ensures only authorized individuals are able to establish a link between Energy Star Portfolio Manager and the GSA Carbon Footprint Tool.

If a GSA Carbon Footprint Tool Account Administrator attempts to click the “Import Portfolio Manager Data” link in the Analyzer before the approval process is complete, they will receive the “Authorization Required” message shown below.



Step 1: Get Started

Go to the Portfolio Manager log-in page - <https://www.energystar.gov/istar/pmpam>

NOTE: This action must be performed by the designated PM Account Manager.

1 Go to the Energy Star Portfolio Manager homepage <https://www.energystar.gov/istar/pmpam>

2 Fill in your Username and Password to begin the import process.

3 Click the “Get Started Now” link to start the process of authorizing the GSA Carbon Footprint Tool to access data on the Portfolio Manager site.

1 PORTFOLIO MANAGER
EPA's system for helping you track and improve energy efficiency across your entire portfolio of buildings.

WHAT'S NEW IN PORTFOLIO MANAGER

EPA's Portfolio Manager tool is being upgraded. [Visit our new project page](#) to see a timeline, download a fact sheet, or register for our next quarterly update webinar.

New! ENERGY STAR Commercial & Industrial Buildings Partner Meeting
Join us on October 10 and 11, 2012, in Washington, DC, for the ENERGY STAR C&I Partner Meeting to learn from experts in energy efficiency and network with other leaders in commercial and industrial energy management. [Learn more and register.](#)

New! New Campus Report added to Portfolio Manager in February 2012 ([Learn More](#))

About Portfolio Manager

- Learn what Portfolio Manager can do for your organization
- Take the Portfolio Manager Tour
- Learn on how to use Portfolio Manager
- Review eligibility requirements to benchmark your facility
- Import facility data

Success through ENERGY STAR

- Read the ENERGY STAR Snapshot to discover how you are contributing
- Learn about ENERGY STAR Leaders that have improved organization-wide
- Take the ENERGY STAR Challenge – improve your buildings' energy efficiency by 10%
- Find buildings that have earned the ENERGY STAR

Username: [Forgot your username?](#)
Password: [Forgot Your Password?](#)
New User? [Register](#) [Login](#)

2 Username: [Forgot your username?](#)
Password: [Forgot Your Password?](#)
New User? [Register](#) [Login](#)

Contact Us | Privacy Policy | Browser Requirements & Plants

3 PORTFOLIO MANAGER
ACCOUNT INFORMATION CONTACTS

Home > My Portfolio

Portfolio Averages	
Baseline Rating: N/A Facilities Included: 0	Current Rating: 56 Facilities Included: 1
Change from Baseline: Portfolio Adjusted Percent Energy Use (%): N/A Facilities Included: 0	
Averages are weighted by Total Floor Space. More about Baselines More about Change from Baseline, Adjusted Energy Use	

[Add](#) a Property
[Import](#) Facility Data Using Templates

Work with Facilities
[Update](#) Multiple Meters
[Share](#) Facilities

Reporting and Analysis
New! [Generate](#) Reports and Graphs
[Request](#) Energy Performance Report
[Request](#) Campus Report

Apply for Recognition
[Apply](#) for the ENERGY STAR
[ENERGY STAR Leaders](#)

Automated Benchmarking
[Get Started Now](#)

Step 2: Select Current Energy Provider

Selecting the GSA Carbon Footprint Tool to act as an energy service provider will allow it to have read-only access to energy data stored in Energy Star Portfolio Manager.

- 1 Select "GSA Carbon Footprint Tool" from the Automated Benchmarking Service Console page and click the "Add" button
- 2 Check the "Agreement" box on the Terms of Use page after reading the terms of use.
- 3 Click the "Continue" button to confirm your selection.
- 4 Select the "Add new buildings and update the existing buildings in my portfolio" radio button
- 5 Click the "Continue" button to confirm your selection.

The screenshots illustrate the following steps:

- Step 1:** In the 'Automated Benchmarking Service Console', the 'GSA Carbon Footprint Tool' is selected from the 'Select an Energy Service Provider' dropdown menu, and the 'ADD >>' button is clicked.
- Step 2:** On the 'Terms of Use' page, the user reads the terms and checks the 'Agreement' checkbox labeled 'I agree to my provider's Terms of Use'. The 'CONTINUE >>' button is then clicked.
- Step 3:** On the 'Data Release Authorization Access Level' page, the user selects the radio button for 'Add new buildings and update existing buildings in my portfolio' and clicks the 'CONTINUE >>' button.

Step 3: Select the Facilities/Campuses to Authorize

1 After clicking “Continue” the Select Facilities/Campuses to Change Authorization page appears next.

Check the boxes next to all facilities/campuses that should be authorized to transfer energy consumption data from EPA Portfolio Manager to the GSA Carbon Footprint Tool.

2 After all boxes have been checked, click “Update List”.

3 After authorization has been granted for all desired facilities/campuses, click “Continue”.

PORTFOLIO MANAGER

Home > My Portfolio > ABS Select Facilities/Campuses to Change Authorization

Select Facilities/Campuses to Change Authorization

Select facilities/campuses to change the Automated Benchmarking authorization for GSA Carbon Footprint Tool. Use the checkbox in the far left column to select the appropriate facilities/campuses and click the "Update List" button to add these to your list of Selected Facilities/Campuses.

Please note that you can only change the authorization for a maximum of 50 facilities/campuses at a time. If you have more than 50 facilities/campuses you may return to this screen and repeat the process for the additional facilities/campuses.

See [Authorizing an Energy Service Provider](#) for more information.

CANCEL UPDATE LIST CONTINUE >>

Results 1 - 2 of 2 All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Select Facility/Campus	Facility/Campus Name	Building/Campus ID	Meter Authorizations	Selected Facilities/Campuses # Selected (Max 50)
<input checked="" type="checkbox"/>	PM authorization Test	3100750	View Meter Authorizations	
<input type="checkbox"/>	Sample Facility	3100703	View Meter Authorizations	

Results 1 - 2 of 2 All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

CANCEL UPDATE LIST CONTINUE >>

Note: Up to 50 facilities/campuses may be selected at any one time.

Also, if the agency adds new facilities or campuses to Energy Star Portfolio Manager in the future, they will not be authorized by default. The Energy Star Portfolio Manager Account Manager will need to repeat this approval process as described in Part 1b.

Step 4: Authorize Facilities/Campuses

- 1 Check the boxes next to all buildings/meters that should be authorized to transfer energy consumption data from Energy Star Portfolio Manager to the GSA Carbon Footprint Tool.
- 2 Select the "Read Only" radio button for each building/meter.
- 3 Click the Continue button.

NOTE: If the agency adds new buildings or meters to Energy Star Portfolio Manager in the future, they will not be authorized by default. The Energy Star Portfolio Manager Account Manager will need to repeat this approval process as described in Part 1b.

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > ABS Select Buildings and Meters

Select Buildings and Meters to Authorize

Select buildings and/or meters you authorize GSA Carbon Footprint Tool to access. You have three basic authorization options:

- 1) **Read/Write** access to building level data authorizes your service provider to read(retrieve) and write (update) facility and space data.
- 2) **Read/Write** access to meter level data authorizes your service provider to retrieve and update meter level data. Selecting this option also gives your service provider read/write access to building level data.
- 3) **Read/Only** access to meter level data authorizes your service provider to retrieve meter level data. Selecting this option also gives your service provider read/write access to building level data.
- 4) **None** access to meter level data deauthorizes your service provider's current access to meter level data or indicates that your service provider does not currently have any access to meter level data.

Please note that if there are multiple ABS Providers managing the same building, then there is the possibility of building information (which includes building level and space information - but not meter information) being overwritten.

You can only authorize meters to those buildings that you requested authorization for or to buildings that have not been authorized yet. You may return to this screen at any time to change these selections. Please note that de-selecting a building or meter after your service provider has successfully connected to it will remove their ability to provide data for it altogether.

Select the Buildings and/or Meters You Authorize Your ESP to Provide Data

Select	Authorized Energy Service Provider	Date Authorized (Authorized By)
<input checked="" type="checkbox"/> PM authorization Test	<ul style="list-style-type: none"> GSA Carbon Footprint Tool 	<ul style="list-style-type: none"> 04/10/2012 (USERNAME)
PM Auth 1 (Electricity) <input type="radio"/> None <input type="radio"/> Read/Write <input checked="" type="radio"/> Read Only	<ul style="list-style-type: none"> GSA Carbon Footprint Tool (Read Only) 	<ul style="list-style-type: none"> 04/10/2012 (USERNAME)
Natural Gas Meter (Natural Gas) <input type="radio"/> None <input type="radio"/> Read/Write <input checked="" type="radio"/> Read Only		
Coal (Coal (anthracite)) <input type="radio"/> None <input type="radio"/> Read/Write <input checked="" type="radio"/> Read Only		
PM auth 1 (Indoor/Outdoor) <input type="radio"/> None <input type="radio"/> Read/Write <input checked="" type="radio"/> Read Only		

<< BACK CONTINUE >>

Step 5: Review Confirmation Message and Existing Providers List

1 A green confirmation message will display the number of facilities/campuses and the number of buildings/meters that are awaiting approval.

2 The GSA Carbon Footprint Tool will appear under the list of Existing Providers with a status of “Connection to ESP Requested – Awaiting ESP Response” after the authorization process is complete.

***** The GSA Carbon Footprint Tool Account Administrator(s) will receive an email notification with a list of the new facilities/campuses or buildings/meters that have been approved to transfer data from Energy Star Portfolio Manager to the GSA Carbon Footprint Tool.

The screenshot shows the Energy Star Portfolio Manager interface. At the top, there is a navigation bar with the Energy Star logo and 'PORTFOLIO MANAGER'. Below this, a green banner displays a confirmation message: 'Authorized GSA Carbon Footprint Tool. Assigned 1 facilities/campuses and 1 meters. Awaiting approval.' Below the banner, the 'Automated Benchmarking Service Console' section provides instructions and options for selecting a provider or inquiring about new services. At the bottom, the 'Existing Providers' section contains a table with the following data:

Provider	Energy Service Provider Status	Items Authorized for Automated Benchmarking
GSA Carbon Footprint Tool GSA Carbon Footprint Tool Ts & Cs Email Web Site	Connection to ESP Required - Awaiting ESP Response View Pending Authorizations	1 Facilities/Campuses Change Authorization

NOTE: Upon receipt of this email notification, the Account Administrator(s) can proceed with the steps outlined in “Part 2: Import Energy Star Portfolio Manager Data to the GSA Carbon Footprint Tool”.

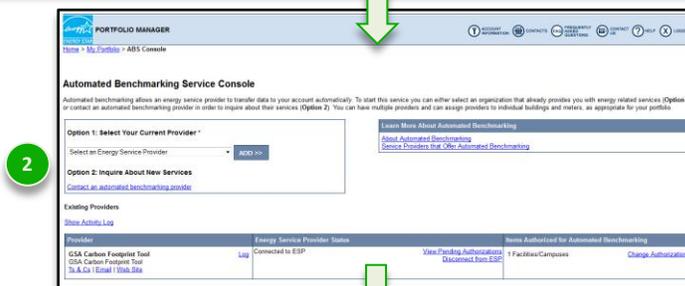
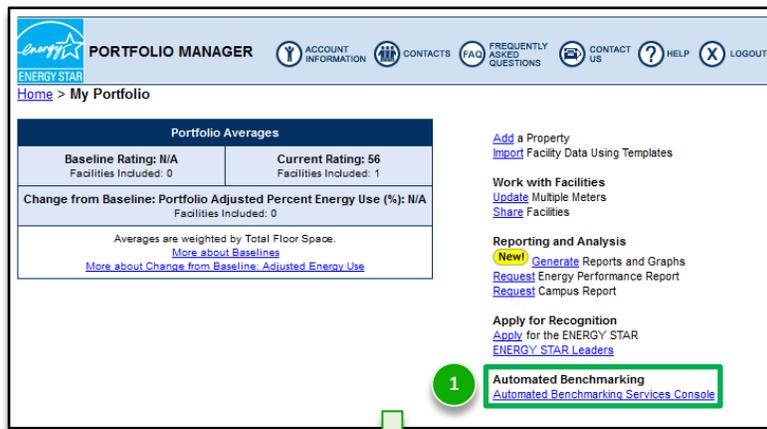
Part 1b: Share Additional Data after Initiation

The buildings and meters initially selected in Part 1a are the only ones that will share data with the CFT. If new buildings are added to Portfolio Manager, or if existing buildings need to be shared, use the steps that follow.

Step 1: Start Change of Authorization Process

- 1** Click the **“Automated Benchmarking Services Console”** link.

This changes from the **“Get Started Now”** link once data sharing approval has been initiated.
- 2** The **Automated Benchmarking Services Console** page appears after clicking the **“Automated Benchmarking Services Console”** link.
- 3** Click the **“Change Authorization”** link under **Items Authorized for Automated Benchmarking**.



Provider	Energy Service Provider Status	Items Authorized for Automated Benchmarking
GSA Carbon Footprint Tool GSA Carbon Footprint Tool Ts & Cs Email Web Site	Log Connected to ESP View Pending Authorizations Disconnect from ESP	1 Facilities/Campus: 3 Change Authorization

NOTE: Existing or new facilities/campuses that have not been previously authorized will show up in the page that follows.

Step 2: Select Additional Facilities/Campuses to Authorize

- 1 The **Select Facilities/Campuses to Change Authorization** page appears after clicking “Change Authorization”.
- 2 Check the boxes next to all facilities/campuses that should be authorized to transfer energy consumption data from Energy Star Portfolio Manager to the GSA Carbon Footprint Tool.
- 3 After all boxes have been checked, click “**Update List**”.
- 4 After authorization has been granted for all desired facilities/campuses, click “**Continue**”.
- 5 Complete the authorization process by following Step 3, Step 4 and Step 5 in Part 1a then proceed to “Part 2: Import Energy Star Portfolio Manager Data to the GSA Carbon Footprint Tool”.

1

PORTFOLIO MANAGER

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > ABS Select Facilities/Campuses to Change Authorization

Select Facilities/Campuses to Change Authorization

Select facilities/campuses to change the Automated Benchmarking authorization for GSA Carbon Footprint Tool. Use the checkbox in the far left column to select the appropriate facilities/campuses and click the “Update List” button to add these to your list of Selected Facilities/Campuses.

Please note that you can only change the authorization for a maximum of 50 facilities/campuses at a time. If you have more than 50 facilities/campuses you may return to this screen and repeat the process for the additional facilities/campuses.

See [Authorizing an Energy Service Provider](#) for more information.

CANCEL
UPDATE LIST
CONTINUE >>

Select Facility/Campus	Facility/Campus Name <input type="checkbox"/>	Building/Campus ID	Meter Authorizations	Selected Facilities/Campuses # Selected (Max 50)
<input checked="" type="checkbox"/>	PM authorization Test	3100750	View Meter Authorizations	
<input type="checkbox"/>	Sample Facility	3100703	View Meter Authorizations	

Results 1 - 2 of 2 All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

CANCEL
UPDATE LIST
CONTINUE >>

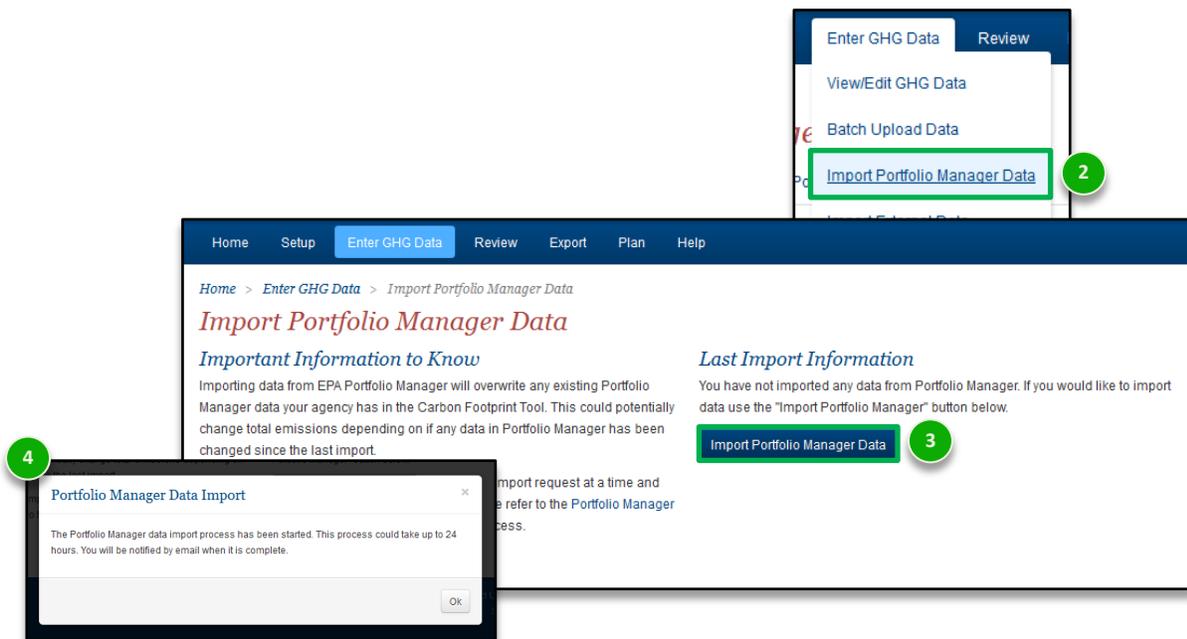
Part 2: Import Energy Star Portfolio Manager Data

By selecting the “Import Portfolio Manager Site and Energy Data” feature within the GSA Carbon Footprint Tool, all site and energy meter data from the beginning of fiscal year 2008 to present will be imported from Energy Star Portfolio Manager into the GSA Carbon Footprint Tool.

NOTE: The authorization process must be completed before it is possible to transfer data from Energy Star Portfolio Manager to the GSA Carbon Footprint Tool. See “Part 1a: Initiate Data Sharing” for the steps that must be completed before attempting to import data.

Step 1: Import Portfolio Manager Data

- 1 Log in to GSA Carbon Footprint Tool <https://www.carbonfootprint.gsa.gov/>
- 2 Click the “**Import Portfolio Manager Data**” link in the Enter GHG Data section of the navigation menu.
- 3 Click on the “**Import Portfolio Manager Site and Energy Data**” Button.
- 4 The Carbon Footprint Tool will display a notification stating that the data import process has started.



NOTE: If a pop-up window appears indicating “Authorization Required”, then the authorization process has not been completed. Please review the steps in “Part 1a” or send an email to carbonfootprint@gsa.gov for further assistance.

NOTE: When the site and energy data refresh is complete, the agency’s GSA Carbon Footprint Tool Account Administrator(s) will receive a notification email indicating the number of sites and scenarios that were updated and a list of the names of the sites and scenarios that were updated.

Step 2: Review Sites and Scenarios

When the agency Account Administrator(s) logs into The GSA Carbon Footprint Tool, they can review the imported sites by selecting “Agency Sites” from the Enterprise Profile page.

The Account Administrator(s) can also examine imported energy data by reviewing scenarios on the View/Edit GHG Data page. Imported energy meter data will be stored as scenarios in The GSA Carbon Footprint Tool. **A scenario is created for every year of meter data that is imported and given the name “PM Import”.**

Home > Enter GHG Data > View/Edit GHG Data

View/Edit GHG Data

Create Scenario Showing 1 to 10 of 20 entries Batch Operation

Year	Site	Scenario Name	Owner	Total Emissions	Last Updated	Actions
FY2012	Test Facility 3	PM Import	Federal Employee	0.03 MT CO ₂ e	May 11, 2012 2:46 pm	[Icons]
FY2012	Test Facility 1	PM Import	Federal Employee	0.27 MT CO ₂ e	May 11, 2012 2:45 pm	[Icons]
FY2012	Test Facility 2	PM Import	Federal Employee	0.00 MT CO ₂ e	May 11, 2012 2:45 pm	[Icons]
FY2011	Test Facility 3	PM Import	Federal Employee	0.04 MT CO ₂ e	May 11, 2012 2:40 pm	[Icons]
FY2011	Test Facility 1	PM Import	Federal Employee	0.38 MT CO ₂ e	May 11, 2012 2:40 pm	[Icons]
FY2011	Test Facility 2	PM Import	Federal Employee	0.00 MT CO ₂ e	May 11, 2012 2:40 pm	[Icons]
FY2010	Test Facility 3	PM Import	Federal Employee	0.00 MT CO ₂ e	May 11, 2012 2:35 pm	[Icons]
FY2010	Test Facility 1	PM Import	Federal Employee	0.00 MT CO ₂ e	May 11, 2012 2:35 pm	[Icons]
FY2010	Test Facility 2	PM Import	Federal Employee	0.00 MT CO ₂ e	May 11, 2012 2:35 pm	[Icons]
FY2009	Test Facility 3	PM Import	Federal Employee	0.00 MT CO ₂ e	May 11, 2012 2:30 pm	[Icons]

Show 10 entries First Previous 1 2 Next Last Batch Operation

Part 3: Refresh Energy Star Portfolio Manager Data

After an initial import has been completed, the “Refresh Portfolio Manager Site and Energy Data” button now appears. Clicking this button begins the refresh process and all site and energy meter data in Energy Star Portfolio Manager is imported again.

The data refresh process lets agencies update the data in the GSA Carbon Footprint Tool to ensure it accurately reflects any modifications or additions that were made since the last import/refresh.

NOTE: The authorization process from “Part 1a” must be completed before it is possible to transfer data from Energy Star Portfolio Manager to the GSA Carbon Footprint Tool.

- 1 Log in to GSA Carbon Footprint Tool <https://www.carbonfootprint.gsa.gov/>
- 2 Click the “**Import Portfolio Manager Data**” link in the Enter GHG Data section of the navigation menu.
- 3 Click on the “**Import Portfolio Manager Site and Energy Data**” Button.
- 4 The Carbon Footprint Tool will display a notification stating that the data import process has started.

The screenshot shows the 'Import Portfolio Manager Data' page in the GSA Carbon Footprint Tool. The page includes a navigation menu with 'Enter GHG Data' and 'Review' tabs. The 'Enter GHG Data' dropdown menu is open, showing options like 'View/Edit GHG Data', 'Batch Upload Data', 'Import Portfolio Manager Data' (highlighted with a green circle '2'), 'Import External Data', and 'Scope 3 Commuter Survey'. The main content area has a 'Refresh Portfolio Manager Data' button highlighted with a green circle '3'. Below this, there is a table with columns for 'Date Requested', 'Requested By', 'Date Completed', and 'Status'. Two pop-up windows are overlaid: 'Portfolio Manager Data Refresh' (with a green circle '4') and 'Portfolio Manager Request Result' (with a green circle '4'). A green arrow points from the 'Yes' button in the first pop-up to the 'Portfolio Manager Request Result' pop-up.

NOTE: If a pop-up window appears indicating “Authorization Required”, then the authorization process has not been completed. Please review the steps in “Part 1a” or send an email to carbonfootprint@gsa.gov for further assistance.

NOTE: When the site and energy data refresh is complete, the agency’s GSA Carbon Footprint Tool Account Administrator(s) will receive a notification email indicating the number of sites and scenarios that were updated and a list of the names of the sites and scenarios that were updated.