

# 5 Steps to Benchmarking



Energize  
Saint Paul

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## A Quick Start Guide to Portfolio Manager

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### Create a Portfolio Manager Account

Go to <https://portfoliomanager.energystar.gov/pm/signup>.

## Add Your Property

In your Portfolio Manager account, click the "Add a Property" button under the MyPortfolio tab. Enter basic information about the building, like the property type, occupancy, and Gross Floor Area (GFA). Continue inputting the "Use Details," which are specific to the building's property type. Click "Add Property," and you'll be taken to your MyPortfolio dashboard.

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### Set Up Meters and Add Xcel Energy Data

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In the "MyPortfolio" tab, select your property, click on the "Energy" tab, and click the "Add a Meter" button. From here, there are two options:

Xcel Energy will aggregate all building data into two meters - electricity (unit is kWh) and natural gas (unit is therms). Create two meters and name them "whole building electricity" and "whole building natural gas." Then, use Xcel Energy's automatic data entry tool by following the steps at [xcelenergy.com/energybenchmarking](http://xcelenergy.com/energybenchmarking).

OR

Manually enter the data from your bills. Click "Add a Meter," and select the meter type. Enter the units and the date the meter became active (use the date you will start entering data from). Enter energy use metrics for each month, from at least June 2017 to the most recent month available.

## Enter Data from District Energy

Any hot or chilled water from District Energy will need to be entered manually on separate meters. The units for hot water are kBTUs, and the units for chilled water are ton hours. See the 2nd page of your District Energy bill for these meter readings.

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### Check Your Work

Double check that all property details and meter readings have been inputted correctly. Use Portfolio Manager's data verification tool by clicking the "Check for Possible Errors" button under your property's "Summary" tab.

## Additional Resources

- Portfolio Manager Training: [energystar.gov/buildings/training](http://energystar.gov/buildings/training)
- Xcel Energy Benchmarking Guide: [xcelenergy.com/energybenchmarking](http://xcelenergy.com/energybenchmarking)
- Energize Saint Paul Office Hours: Tuesdays and Thursdays from 1-5 PM, call 651-266-6656
- Benchmarking Info: [stpaul.gov/benchmarking](http://stpaul.gov/benchmarking)



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