

Step-by-Step Instructions for State Agencies, Colleges and Universities Benchmarking Buildings

DES Energy Program

Using the EPA Portfolio Manager

1. **Start by viewing [the animated training session](#)** on the EPA Portfolio Manager. There is audio, so be ready to turn down the volume. This training session sometimes takes a few minutes to load. Review the [Frequently Asked Questions \(FAQ\) for Washington State Agencies](#), which contains answers to questions most often asked by agencies and colleges. Reading the FAQ is important to save time and avoid missteps.
2. **Talk to your agency, [college or university point of contact](#) for instructions on using your agency master account**, and sharing with others in your agency. Your agency point of contact may instruct you to use the established master account which bears your agency name, or may instruct you to create an account and share access with the college or agency master account. Each agency will organize their accounts according to their need to manage and access information internally. Your account will have a user name and password. You control access to your account. You can share your account with other users, and you define what level of access they have (read only, entering utility data, and/or updating facilities characteristics). Determine who in your agency needs access, and what type, when deciding how to share your account access.
3. **Follow the instructions in the animated training session (see #1 above) to create facilities in your Portfolio Manager account.** The Portfolio Manager, like OFM, calls a building a “Facility.” Here is the format for every state agency or higher education Facility Name in Portfolio Manager: **agency abbreviation, campus (if applicable), building name.** For example, **DOC SCCC Admin Building or WSU Vancouver Library.** You can use as many as 60 characters for your Facility Name, but it is probably more practical to keep it short. It is very important to use this naming format, so that an alphabetical sort groups the buildings by agency and campus. If you have difficulty entering your facility into the Portfolio Manager, see the Frequently Asked Questions and other resources on the [DES Energy Program Portfolio Manager webpage](#). If you are unable to resolve your problem, use the contacts provided to call or email for assistance.
4. **Enter the Office of Financial Management (OFM) Facility Inventory System (FIS) Unique Facilities Identification (UFI) number for each building.** OFM has provided each facility with a unique identifier called the OFM Unique Facilities Identification (UFI) number. This unique identifying number connects the Portfolio Manager data with all other information about this facility in the state database. Open the Facility in Portfolio Manager. Select “Edit” at the top right of the page. When the edit window opens, scroll down to the bottom to find the “Unique Building Identifier”

data field. Enter only the 6 character alphanumeric UFI in this field. Be sure to click on “Save” at the very bottom of the page. **It is very important to enter a UFI number for each facility in Portfolio Manager, to correctly associate building energy use with building characteristics in the OFM database, and to confirm that all state buildings over 10,000 gsf or on campuses over 10,000 gsf have been benchmarked in Portfolio Manager.**

5. **Follow instructions in the animated training session to create spaces and meters, and enter utility data into your Portfolio Manager account.** If you have difficulty, see the [Frequently Asked Questions](#) and other resources on the [DES Energy Program Portfolio Manager](#) webpage. If you are unable to resolve your problem, use the contacts provided to call or email for assistance.
6. **[Share the facilities in your account](#) with the Department of Enterprise Services (DES),** giving read-only access, so that DES can post the energy use of your facilities for public viewing, and create reports.

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