**EPA ENERGY STAR Portfolio Manager®
to GRESB converter**

Contents

The creation of the guide and converter have been supported by the expertise and feedback of following GRESB Associate members:

Additionally, GRESB would like to thank the EPA ENERGY STAR commercial buildings team for their guidance in creating this tool.

This guidance document accompanies the 'Portfolio Manager to GRESB converter' and is intended for participants who measure and track their assets in EPA ENERGY STAR Portfolio Manager®. EPA ENERGY STAR Portfolio Manager® is an online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions. This guidance provides direction on converting data from Portfolio Manager to the Performance Indicators of the GRESB Assessment.

Using the converter, the participant can download their property data from Portfolio Manager, and upload the asset level information into the GRESB Assessment Portal. Once uploaded, all aggregation and calculations to the portfolio level are performed automatically in the GRESB Portal.

Asset-level data submitted by participants is not used by GRESB to calculate scores and is not communicated to a participant's investors. The purpose of GRESB providing support for asset-level data collection is to assist participants and their advisors with the submission process and to improve the quality of the data submitted to GRESB.

Is the converter appropriate for my submission?

The converter can be used for all portfolios with data in EPA ENERGY STAR Portfolio Manager®. The assets should have a minimum of 12 months of complete data in Portfolio Manager covering the period January 1 to Dec 31 of each reporting year. For complex portfolios, such as those with incomplete data or many acquisitions and dispositions, the converter can still be used but additional calculations will need to be performed.

Before using the converter, make sure the data in Portfolio Manager is complete (http://www.energystar.gov/benchmark).

The data conversion requires several steps:

Step 1: Download the consumption data from Portfolio Manager
Step 2: Import the data into the converter
Step 3: Refine the data as needed
Step 4: Review the data and add any supplemental data
Step 5: Upload the final spreadsheet in the GRESB Portal

A Open the **Portfolio Manager link** and log into your ENERGY STAR Portfolio Manager account.

EPA ENERGY STAR Portfolio Manager template

Clicking this link will open the Portfolio Manager log-in screen in the default browser. Once logged in, the 'GRESB – 2014-2015 Data' report template will be added to the list of Templates & Reports, found under the 'Reporting' tab.
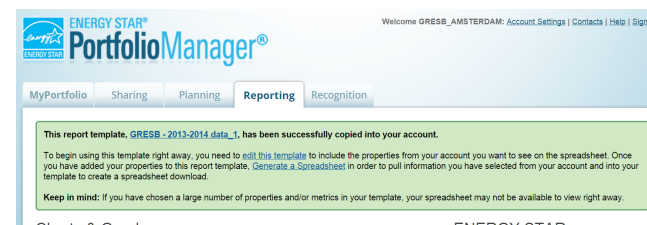
Welcome to Portfolio Manager

Helping you track and improve energy efficiency across your entire portfolio of properties.

Username: *
Password: *

I forgot my password.
I forgot my username.   **Sign In**

ENERGY STAR®
PortfolioManager®   Welcome GRESB_AMSTERDAM: Account Settings | Contacts | Help | Sign Out

MyPortfolio Sharing Planning **Reporting** Recognition

This report template, GRESB - 2013-2014 data_1, has been successfully copied into your account.

To begin using this template right away, you need to edit this template to include the properties from your account you want to see on the spreadsheet. Once you have added your properties to this report template, Generate a Spreadsheet in order to pull information you have selected from your account and into your template to create a spreadsheet download.

Keep in mind: If you have chosen a large number of properties and/or metrics in your template, your spreadsheet may not be available to view right away.

B In the 'Templates & Reports' overview, **identify the 'GRESB – 2014-2015 Data'** template. Select **'I want to...'** in the action column and choose **'Edit this Template'** in the dropdown menu

Templates & Reports (9)   **Create a New Template**

⬍	Name	⬍	Status	▼	Action
📊	GRESB - 2014-2015 data		No Report Generated		✓ I want to...
					Generate New Report
📋	ENERGY STAR Certification Status		No Report Generated		**Edit this Template**
					Share this Template
📊	Energy Performance		No Report Generated		Request Data using this Template

C At step 3 **'Select Properties to Include'**, select 'Select number of Property(ies)' and choose **'Multiple Properties'** in the dropdown menu.

3 Select Properties to Include

Properties: * | Multiple Properties ▼ |
- Select Number of Property(ies) -
One Property
Multiple Properties
All Properties

4 Select Inform...

Information & Metrics: **Select Information & Metrics**   Selected Items: 47

No changes should be made in steps 1, 2 and 4.

D Select the assets to be included in the GRESB Assessment submission, click **'Apply Selection'** and save the template with the selected assets.

The selected assets should be aligned with the assets reported in question RC5.1 of the 'Entity and Reporting Characteristics' section in the GRESB Assessment. Assets not included in Portfolio Manager can be manually added to the 'GRESB Asset level data' sheet (step 4H).

E A 'GRESB 2014-2015 Data' report can now be created for download, select **'I want to...'** in the action column and choose **'Generate New Report'** in the dropdown menu.

Depending on the size of portfolio, the report may take several minutes to generate. When the page is refreshed a green bar will appear, indicating that the report has been generated.

F Select **'I want to...'** in the action column and choose **'Download Current Report in Excel'** in the dropdown menu. Save the Excel file in the download folder.

Depending on the settings of the browser, it will either save the report in your default download folder, or ask where to save the file. Save the file in an accessible folder, e.g. on the desktop or download folder.

A Open the downloaded Portfolio Manager report **'GRESB – 2014-2015 Data'** file and select the **'Information and Metrics'** sheet

17	1125437	04027		31/12/2012	Parkway	Not Available	Alpharetta	Not Available	Georgia	3
18	1273515	Water Garden Olympic		41639	2425 Olympic Blvd	Not Available	Santa Monica	USA	California	9
19	1273515	Water Garden Olympic		41274	2425 Olympic Blvd	Not Available	Santa Monica	USA	California	9
20	1273929	Water Garden 26th str		41639	1620 26th St	Not Available	Santa Monica	USA	California	9
21	1273929	Water Garden 26th str		41274	1620 26th St	Not Available	Santa Monica	USA	California	9

Information and Metrics | Comparisons | ⊕

READY

B Select all cells with the **'Select all button'** and copy all selected cells by using the keyboard shortcut ctrl-C (cmd-C)

	A	B	C	D
1	GRESB - 2014-2015 data			
2	Date Generated: 04/08/2016 10:03 AM EDT			
3	Number of properties in report: 43			
4				

As indicated, the 'Select all button' is located in the left corner of the worksheet where the row header and column header meet.

C Download the **'Portfolio Manager to GRESB converter'**

https://www.gresb.com/EPA-to-GRESB-converter

D Open the **'Portfolio Manager to GRESB converter'** file and select the **'Portfolio Manager data'** sheet

22					
23					
24					
25					
26					
27					
28					

Portfolio Manager data | Parameters | GRESB Asset level data | ⊕

READY

E **Select all cells** with the 'Select all button' (See step 2C)

	A	B	C	D	
1	**GRESB - 2014-2015 data**				
2	Date Generated: 04/08/2016 10:03 AM EDT				
3	**Number of properties in report: 43**				
4					

F **Paste the copied cells** using the shortcut 'ctrl-V' (cmd-V)

The Portfolio Manager data should now be in the converter. The consumption data must be reviewed before the results can be used for the GRESB Assessment. Pasting in the data copied in step 2B will populate the converter with this data.

The consumption data in the 'GRESB 2014-2015 data' converter is displayed in two worksheets: 'Parameters' and 'GRESB Asset level data'. The 'Parameters' worksheet provides an overview of the assets and can be used to make initial refinements. Based on the decisions in the parameters worksheet, the converter will populate the 'GRESB Asset level data' worksheet. The 'GRESB Asset Level data' worksheet can be used to add new buildings, edit special cases and conduct a final review. **Once edits are made to the GRESB Asset Level Data Sheet, do not make any additional changes to the 'Parameters' sheet.**

Cautions
- The converter is recommended for a maximum of 1000 assets. For larger portfolios, email info@gresb.com for guidance.
- The GRESB submission should represent all assets in the portfolio. When a participant does not use ENERGY STAR Portfolio Manager to track all assets in the portfolio, the missing assets should be added manually to the asset level spreadsheet (See step 4H).
- ENERGY STAR Portfolio Manager does not track waste data. If this data is available, participants should enter the waste data manually in the asset level spreadsheet or in the GRESB Assessment Portal (See step 4F).

The Parameter sheet

A In the **'PORTFOLIO MANAGER to GRESB converter'** file, open the **'Parameters'** sheet

Each row contains the 'Portfolio Manager' data of an asset; the columns represent the additional data needed to refine the data for the GRESB Assessment. Each column will be discussed separately and the necessary steps will be explained.

B Column B: Review and adjust the **suggested property type** as needed

In this column, the converter initially suggests an appropriate property type for the GRESB Assessment, which is based on the primary property type assigned in Portfolio Manager. If the suggested property type for an asset is incorrect, select the cell and use the dropdown menu to select the preferred property type.

C Column C: Review and adjust the **percentage directly managed** as needed

In this column, the assets are by default defined as directly managed assets. If an asset is indirectly managed, amend the cell using the dropdown menu.
- If the asset is directly managed, select 100 percent.
- If the asset is indirectly managed, select 0 percent.
- If the asset is partially directly and indirectly managed, enter the percentage of the asset that is directly managed.

These values must be in agreement with RC5.1 or the submission will be scored incorrectly.

D Columns D-E: Review and adjust the **period of ownership in months** as needed

The assets must have 12 months of data in Portfolio Manager; otherwise the 'GRESB 2014-2015 data' report returns 'Not available' for all utilities. If the report returned 'Not available' for all utilities, the converter will flag the cell with red. In this case, three scenarios are possible:
- The consumption data in Portfolio Manager is incomplete and does not include 12 months of data. Add the missing consumption data in Portfolio Manager and restart the converter process.
- The asset did not consume any fuels, district heating, electricity or water during this year, select and amend the cell with 12 months instead of 0. At step 3G, amend the answer of the question if the utilities are used at the asset to 'Yes'.
- The asset was part of a mid-year disposition or acquisition. Amend the cell by manually entering the months of ownership. Guidance for adding data to this period will be provided when reviewing the 'GRESB Asset level' sheet (See step 5).

E   Columns F-G: Review and adjust the **metered areas** as needed

These columns designate which areas within the assets are serviced by energy and water meters. If this data is incorrect, select the cell and amend the data using the dropdown menu.

F   Columns H-J: Review and adjust the **floor area** as needed

These columns are prepopulated with the gross floor area as reported in Portfolio Manager. This includes all areas inside the building such as the common and tenant areas. If the metered areas consist of whole building data, the breakdown of the common and tenant area is not necessary.

If the metered areas consist of common or tenant areas only, specify the square footage of these areas in columns I and J. The common and tenant area should add up to the total floor area of the asset (see the example above).

**G**   Columns K-Z: Review and adjust the **consumption data** as needed

The consumption data is structured into four sections; Fuels, District Heating & Cooling, Electricity and Water (The GHG emissions are based on energy consumption). Each section requires similar actions:

- In each section, indicate if a type of utility is consumed at the building. If the Portfolio Manager report did not contain consumption data for that utility, the question is by default answered with 'No'. If the asset did consume that utility during one of the reporting years, amend the answer to 'Yes'.
- Review if the Data Coverage (type) reflects the reported meter in Portfolio Manager. If not, choose the correct data coverage (type) in the dropdown menu.
- Review if the data coverage and maximum coverage of the assets are correct. If not, overwrite the formula and enter the correct coverage for the asset.
- By default, the maximum coverage is the Gross Floor Area reported in Portfolio Manager.

The 'GRESB Asset level data' worksheet contains the data in the format used in the GRESB Assessment data input Portal, and is populated by the other worksheets. When the converter is uploaded in the Performance Indicators section of the Assessment, only the data in this sheet will be used to calculate the portfolio level answers for the GRESB submission. Therefore, **the data should be carefully reviewed to make sure it is accurate. This is also the opportunity to add missing data.**

A In the **'PORTFOLIO MANAGER to GRESB converter'** spreadsheet, open the **'GRESB Asset level'** sheet.

20						
21						
22						
23						
24						
25						

Portfolio Manager data | Parameters | **GRESB Asset level data** | ⊕

READY
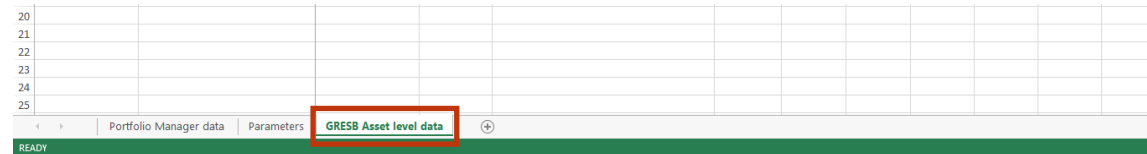
B **Columns B-I:**
Building characteristics

Confirm that the building characteristics are correct and accurate; Carefully check the period of ownership.
For the GRESB Assessment submission, it is not mandatory to disclose the Property ID, address and/or country.

C **Columns J-CU:**
Energy consumption

Confirm that the energy consumption data is correct and accurate.

D **Columns CV-DN:**
GHG emissions

Confirm that the GHG emissions data is correct and accurate.
Add GHG emissions in Scope 3 if applicable. Consult the GRESB Guidance document for further information.

E **Columns DO-EU:**
Water consumption

Confirm that the water consumption data is correct and accurate.

F **Columns EV-FX:**
Waste data

Enter the missing waste data for each asset if available.

G Annual data

Confirm that all buildings represented as having twelve months of complete data actually contain twelve months of data. If not, overwrite the formulas and enter the correct consumption data.

H Missing or extra assets

Confirm that the "GRESB Asset Level" sheet contains only the intended buildings, and no others. If not all assets in the portfolio are measured and tracked in Portfolio Manager, add the assets according to the following two options:

- For properties that are not in Portfolio Manager, but for which the participant does have **access to the data**, the participant will need to manually add the properties and missing energy, GHG, water, and waste data in the empty rows below the current assets.
- For properties that are not in Portfolio Manager because there is **no access to the data**, add the "missing" assets to the GRESB Asset level sheet. For any utilities (energy, water, GHG and waste) used at these assets:
  - Enter the total square footage of the missing assets to the maximum coverage of the whole building.
  - Enter data coverage and consumption as zero.

I Missing or inaccurate performance data

Confirm that each building has data of a probable magnitude and a year-over-year trend as expected.

J Partial year assets

Enter the consumption data for assets with less than 12 months of data. (See scenario 1)

- For an asset that was recently acquired, but Portfolio Manager contains data through at least the end of 2014: The converter will import 12 months of data including data from before it was acquired. The participant will have to overwrite the formula and manually input the data in the 'GRESB Asset Level' sheet to only include the data during the period of ownership.
- For an asset that was recently acquired and only has data from the date of acquisition forward: The converter will not generate the data because there will be less than 12 months of data. The participant will have to manually enter the data to include only the period of ownership in the 'GRESB Asset Level' sheet:
  - Locate the asset for which the converter did not generate consumption data.
  - Enter the consumption data of the asset in the row behind the property name.
  - Only adjust data in the 'GRESB Asset Level' sheet, and do not amend the 'Parameters' sheet.

K Data coverage

Confirm that the calculated data coverage and the management statuses are accurate and complete.

A Open the **GRESB website** and open the **Assessment Portal**

To open the GRESB Assessment portal, register or log into the GRESB website.

B Create or open the Assessment for which the asset level data is applicable

C Upload the **'Portfolio Manager to GRESB converter' spreadsheet** in the Performance Indicator section of the Assessment Portal

Definitions 1: Examples

Example 1: Mid-Year Disposition or Acquisition
Your portfolio includes an office building purchased in June. After running the converter, columns D-E in the Parameters sheet are flagged red and indicate 0 months of data.

Action: If an asset has fewer than 12 complete months of data, Portfolio Manager will not provide data to the report. Amend the converter by manually entering data for the period held in the Parameters sheet. This data can be accessed in Portfolio Manager by clicking on the "Download Property to Excel" link on the property page. Use the information in the spreadsheet to aggregate individual meter data and enter the total into the "GRESB Asset Level" worksheet. Take similar action in the event of a disposition.

Example 2: Missing Asset Data
After running the converter, a continuously held asset is missing data in the 'Portfolio Manager data' sheet.

Action: Review the asset within Portfolio Manager. Confirm that there are no data entry issues during the performance period. The Portfolio Manager data checker, accessible from the property page, can provide specific guidance. Make corrections in Portfolio Manager, rerun the Portfolio Manager report, and rerun the converter tool.

Example 3: Assets without Tenant or Common Area Data
Your portfolio contains a retail strip mall where the tenants are responsible for their own utilities. The tenant data is not available, and there are no interior common areas. There is a shared parking lot with pole lights, which you operationally control.

Action: The asset is indirectly managed. Select 0% coverage in the "Parameters" worksheet and include the exterior area electricity data in the 'GRESB Asset level data' sheet for that asset.

Example 4: Coverage at Assets with Common Area Data
The portfolio contains multifamily residential assets where the residents are responsible for utilities within their own units, and you are responsible for common area and exterior utilities.

Action: The coverage depends on the data availability.
- *All data is available:* Enter the Gross Floor Area of the asset (as entered in Portfolio Manager) as the data coverage. The asset is directly managed.
- *Only data for utilities under your control is available:* To represent the common area, enter the difference between the Gross Floor Area (GFA) and the Net Rentable Area (NRA) as the data coverage. The asset is directly managed.

Data Quality for this Property

The metrics that Portfolio Manager calculates depend on your use details and your energy bills. The data quality checker inspects the information you have entered to identify possible errors. If a property is shared with you as "Read Only," you will not be able to run the Data Quality Checker.

Date checker last run: N/A

Result: Unable to Check   ❗ Run Check Now!

Check Data Quality

Example 5: Mixed-Use Properties *Without* Data by Property Type

Your portfolio includes a ten story mixed-used asset which contains eight floors of office space, and two floors of residential space. For this asset, the utility data is only available in aggregate, and cannot be split into property types (office and residential).

Action:
For mixed-use assets where the utility data cannot be parsed by property type, your response will depend on the structure of the mixed-use asset. Where a single property type is more than 75% GAV of the asset , there are two choices.

- Report the asset as the dominant property type and include the entire asset's floor area. Confirm that you use the same designation in RC5.1 and in the Performance Indicators. In this case, the asset would be reported as "Office".
- Report the asset as "Other: Mixed use" and include the entire asset's floor area. Confirm that you use the same designation in RC5.1 and in the Performance Indicators.

If neither property type accounts for more than 75% GAV, then the asset should be reported as "Other: Mixed use". The Property Type can be set in the "GRESB Asset Level Data" worksheet, in the Property type column (C).

Example 6: Mixed-Use Properties *With* Data by Property Type

Your portfolio includes a ten story mixed-used asset which contains eight floors of office space, and two floors of residential space. For this asset, there are submeters separately covering each property type (office and residential), and the utility usage can be cleanly divided between the property types.

Action:
If the asset is considered a single building inside Portfolio Manager, you will need to separate the property into the residential and office areas by manually totaling the appropriate data.

- Navigate to the appropriate property page in Portfolio Manager
- Select the "Download Property to Excel" link at the bottom of the Portfolio Manager property page.
- Sum the "Meter Consumption Data" tab for the appropriate meters and dates.
- Enter the resulting sums as two buildings (two rows) in the "GRESB Asset Level Data" converter worksheet.
  - Only the floor space applicable to each property type should be entered in each row.
  - Certifications applicable to the entire building should be entered in both rows.
  - The greenhouse gas emissions can be excerpted from the downloaded Portfolio Manager report. These emissions should be apportioned to each row using an appropriate method. One possible approximation is to apportion the total using relative shares of energy.
  - Confirm that you use the same designation in RC5.1 and in the Performance Indicators.

Common area
Areas shared with other building occupants, including entrance areas, corridors, lifts, staircases, waste storage stores, communal kitchen, breakout facilities, etc.

Data coverage
The part of the portfolio for which data is available, per area of the building, and per fuel type.

Floor area
The size of a floor surface. Definitions of floor areas vary by location, building type and landlord-tenant arrangement, for example: common parts area, lettable/leasable area, internal area, usable area, occupied area, conditioned/treated area. For reporting to GRESB, participants can choose either to report in gross floor area or in net floor area. Be consistent in the floor area calculation that you use. (GRI CRESS 4)

Indirectly Managed assets
The definition is solely based on the landlord/tenant relationship and is relevant to asset-level data collection and aggregation. For Indirectly Managed assets or buildings, the single tenant is determined to have "operational control," where operational control is defined as having the ability to introduce and implement operating and/or environmental policies and measures. In case both the landlord and tenant have the authority to introduce and implement any or all of the policies mentioned above, the asset or building should be reported as a Managed Asset. For example, in the case of a full repairing and insuring (FRI) lease in England and Wales, the tenant has operational control meaning that the asset is Indirectly Managed.

Maximum coverage
The floor area reported as Maximum Coverage should reflect the total floor area of the asset of that particular area of the building.

Metered areas, energy and water
Metered Areas is a designation of what areas within your building are covered by your energy and water meters.

Outdoor/Exterior areas/Parking
If your energy consumption includes Outdoor/Exterior areas/Parking and is measured separately, you should submit data in Outdoor/Exterior areas/Parking (rows 7-8). Otherwise it can simply be included in Base Building (or Whole Building).

Property type allocation
GRESB uses its own sector categories based on accepted industry classifications:

Retail, High street: Retail buildings located on the high street in a particular area, usually terraced buildings located in the city centre or other high-traffic pedestrian zones.

Retail, Shopping centers: Enclosed centres for retail purposes. Examples can include, but are not limited to: regional malls and shopping malls.

Retail, Warehouse: Refers to buildings in an unenclosed retail space, otherwise known as a strip centre or strip mall, whereby buildings are usually stand-alone and situated side-by-side with their entrance facing a main street or carpark.

Office: Examples can include, but are not limited to: freestanding office, office terrace, unattributed office buildings, and office parks.

Industrial, Distribution warehouses: Industrial buildings used for the purpose of storing, processing, and distribution of goods to wholesalers, retailers, and/or consumers.

Industrial, Manufacturing: Industrial buildings used for the purpose of manufacturing. Otherwise known as a factory or manufacturing plant.

Industrial, Business parks: An industrial business park is an area zoned for the purpose of industrial development, where (light-weight) industrial buildings are grouped together with offices. Examples can include, but are not limited to: industrial estate, trading estate, and enterprise zone.

Residential, Multi-family: Refers to multiple residential dwelling spaces contained within one building, otherwise known as a multi-dwelling unit. This includes low-, mid- and high-rise apartment blocks.

Residential, Family homes: Includes both single-family homes and multi-dwelling units not including apartment blocks. A single-family home is a separate, free-standing residential building. A multi-dwelling family home includes those such as two-flats, duplex, semi-detached, and townhouses. Synonyms include: Single-family home, single-detached dwelling, detached house, single-family residence, separate house, free-standing house, townhouse, duplex, condo,

semi-detached, villa.

Residential, Senior homes: Residential buildings used for the purpose of housing seniors, otherwise known as senior assisted living homes, retirement homes/apartments, retirement villages, old-age homes.

Residential, Student housing: Residential buildings used for the purpose of housing students, otherwise known as student apartments, student houses, student residence, student quarters, and student accommodation.

Hotel: Examples can include, but are not limited to: hotels, motels, youth hostels, lodging, and resorts.

Healthcare: Buildings used for the purpose of primary healthcare. Examples can include, but are not limited to: hospitals, clinics, physical therapy centers and mental health centers.

Medical office: Examples can include, but are not limited to: offices specifically used for the purpose of medical administration, secondary research or other purposes, exclusive of the property types specified for Healthcare.

Leisure: Indoor center used for the purpose of leisure and recreation. Examples can include, but are not limited to: exercise facilities, indoor sports courts, studios, and artificial pitches, swimming centers, and saunas/steam rooms.

Data Centers: Building used for the purpose of data storage, processing, and/or distribution. Examples can include, but are not limited to: telecommunications centers and data storage centers.

Self-storage: Indoor building or warehouse used for the purpose of self-storage for individuals and/or organizations, otherwise known as self-service storage. Parking (indoors): Enclosed, indoor vehicle parking space, usually made up of numerous levels of which vehicles can be parked. Otherwise known as multi-story car park, parking building, parking garage, stacked car parking, and indoor parking.

Scope 1
GHG emission from greenhouse gas sources (greenhouse gas source physical unit or process that releases a GHG into the atmosphere) owned or controlled by the organization. Direct GHG emissions: GRI Indicator G4-EN15.

Scope 2
Energy indirect greenhouse gas emission
GHG emission from the generation of imported electricity, heat or steam consumed by the organization. Energy indirect GHG emissions: GRI Indicator G4-EN16.

Scope 3
Other indirect greenhouse gas emission

GHG emission, other than energy indirect GHG emissions, which is a consequence of an organization's activities, but arises from greenhouse gas sources that are owned or controlled by other organizations. Other indirect GHG emissions: GRI Indicator G4-EN17.

Shared Services/Central Plant
Shared Services/Central Plant is a central source providing energy for the whole building, including common areas and shared services for tenants. If consumption cannot be separated between common areas and shared services, provide both here.

Tenant area
Lettable floor area (both vacant and let/leased).

Whole building
Energy/water used by tenants and base building services to lettable/leasable and common spaces. This should include all energy/water supplied to the building for the operation of the building and the tenant space. For reporting to GRESB, use this section to report consumption data in the case no separate data for Common areas and Tenant space is available. (NABERS Energy and Water for Offices v3.0)