September 2015

EPA Portfolio Manager

Connecticut Lead By Example Master Account

Instructions for sharing Connecticut state and local government building Portfolio Manager accounts with the Connecticut State Master Account

Purpose:

The Connecticut Department of Energy and Environmental Protection (DEEP) Lead by Example (LBE) program is working to reduce energy use in state buildings by 20% by 2018, in accordance with the goals of PA 11-80, with similar reductions by municipal governments. There are many programs to help your agency or municipality reduce energy (see www.ct.gov/deep/leadbyexample). In order to track energy reductions statewide, DEEP has established a State of Connecticut Master Account in EPA Portfolio Manager. We request that you share your existing and newly created building accounts in Portfolio Manager with the appropriate Connecticut master account, enabling DEEP to generate aggregate reports on energy use and reductions in state and local government facilities. By sharing your account, DEEP will have read-only access and will not be able to change any data in your account.

Standardized Account Naming Protocol:

Please use the following account naming protocol when creating new accounts in Portfolio Manager so that building accounts can be easily differentiated and identified. There is an 80-character limit for building names in Portfolio Manager:

1. Buildings that have existing accounts are encouraged to switch to this naming nomenclature.
2. **For K-12 Schools**: Use CTK12 and the following structure:
   - Use abbreviations for School District=SD or Regional School District=RSD plus number
   - **CTK12_DistrictName_Building Name As Listed in Utility Tracking Records**
   - For example, for the Andover Elementary School that belongs to Andover School District, use **CTK12_AndoverSD_ AndoverElementarySchool**
   - For example, for EO Smith High School that belongs to Regional School District 19, use **CTK12_RSD19_EOSmithHighSchool**
   - Do not use spaces between words
   - The building names used should match the names in local Board of Ed records so updating energy and water use information in the future is easier.
3. **For Local Governments** (buildings other than K-12 schools): Use CTLG (for Local Government) and the following structure:
   - **CTLG_Government Name_Building Name As Listed in Government Utility Use Tracking Records**
   - For example, for the Fire House that belongs to City of Hartford, use **CTLG_Hartford_FireHouse_1100MainSt**
   - Do not use "City of" or "Town of"
   - Do not use spaces between words
   - The building names used should match the names in municipal records so updating energy and water use information in the future is easier.

4. **For State Agencies** (non-higher ed): Use CT plus the 3-letter agency abbreviations for all agencies as shown in Attachment A and the following structure:
   - **CTAgencyAbbreviation_Town where building is located_Building Name As Listed in Agency Utility Use Tracking Records_Address**
   - For example, for the State Office Building owned by the Department of Administrative Services, use **CTDAS_Hartford_StateOfficeBuilding_165CapitolAve**
   - Do not use spaces between words
   - The building names used should match the names in agency records so updating energy and water use information in the future is easier.

5. **For BOR Higher Education Institutions**: Use CTBOR and the following structure:
   - **CTBOR_InstitutionAbbreviationCampusName_Town_Building Name As Listed in Utility Tracking Records**
   - For example, for the Academic Hall at Eastern Connecticut State University, use **CTBOR_ECSU_Windham_AcademicHall**
   - Use university or community college abbreviations along with abbreviations for University=U or Community College=CC
   - Do not use spaces between words
   - The building names used should match the names in BOR records so updating energy and water use information in the future is easier.

6. **For UConn Higher Education Institutions**: Use CTUCONN and the following structure:
   - **CTUCONN_Town where campus is located_Building Name As Listed in Utility Tracking Records**
   - For example, for the Jones Hall at University of Connecticut Torrington Campus, use **CTUCONN_Torrington_JonesHall**
   - Do not use spaces between words
   - The building names used should match the names in UConn records so updating energy and water use information in the future is easier.

See next page for Account Sharing Instructions.

Account Sharing Instructions:

Once you have created Portfolio Manager building accounts, follow the steps below to provide DEEP with read-only access. NOTE: When you share a facility with another user, that user will be able to see your username and e-mail address as the person who shared the facility.

1. First step in sharing your property(ies) with CT Master Accounts is to make connections to your correspondent master account (CTLocalGov, CTK12Schools, …). Go to Contacts (upper right corner on Portfolio Manager main page) and click on it. The following window will open:
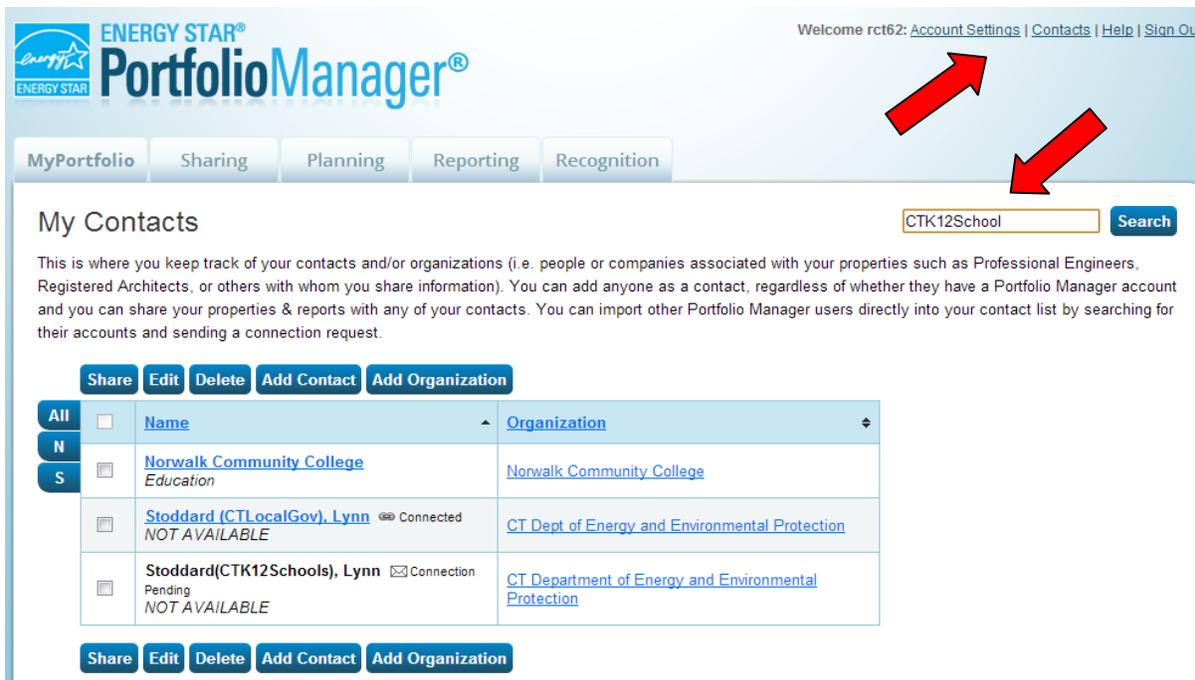
Search by name for:

- For K-12 school buildings, enter username: **CTK12Schools**
- For other municipal buildings, enter username: **CTLocalGov**
- For public higher educational institutions with the CT Board of Regents system, enter username: **CTHigherEdBOR**
- For buildings within the University of Connecticut system, energy username: **CTHigherEdUConn**
- For all other (non-higher ed) state agencies, energy username: **CTStateAgencies**

From Search results select the master account desired and send a request to connect to it. Once the connection request was accepted you'll be able to start sharing your properties.

2. From Portfolio Manager main page menu select the **Sharing** tab and click the **Share a Property** button.

Inside the following window you will be able to choose one, multiple or all properties. You are also asked to select the contact (master account) that you want to share with. Then click **Continue**.

3. Select Access Rights: Please select **Read Only.** When done selecting permission, click **Share Property(ies).**

You will be notified when sharing was accepted by the Master Account manager.

Thank you for sharing your account.

Questions: If you have questions, please contact:
Institute for Sustainable Energy at Eastern Connecticut State University
Email: benchmark@energizect.com / **Phone:** 860-465-0297

September 2015

Attachment 1: List of 3-Letter CT State Agency Abbreviations

Please use the 3-letter agency abbreviations (without the numbers) with the standardized naming protocol to name your building accounts in Portfolio Manager.

AGENCY #	AGENCY NAME
OLM10000	Legislative Management, Office of
APA11000	Auditors of Public Accounts
COA11400	Commission on Aging
CSW11500	Permanent Commission on the Status of Women
CCY11600	Children, Commission on
LPR11700	Latino and Puerto Rican Affairs Commission
CAA11900	African-American Affairs Commission
APC11950	Asian Pacific American Affairs Commission
GOV12000	Governor's Office
GOV12100	Miscellaneous Appropriation to the Governor
SOS12500	Secretary of the State
LGO13000	Lieutenant Governor's Office
OTT14000	State Treasurer
OTT14100	Debt Service - State Treasurer
OSC15000	Comptroller, Office of the State
OSC15100	State Comptroller - Miscellaneous
OSC15200	State Comptroller - Fringe Benefits
DRS16000	Revenue Services, Department of
OGA17000	Office of Governmental Accountability
OPM20000	Policy and Management, Office of
OPM20100	OPM - Reserve for Salary Adjustments
DVA21000	Veterans' Affairs, Department of
DAS23000	Administrative Services, Department of
DAS23100	Workers' Compensation Claims - DAS
DPW27000	Construction Services, Department of
OAG29000	Attorney General, Office of the
DCJ30000	Criminal Justice, Division of
DPS32000	Emergency Services and Public Protection, Department of
DMV35000	Motor Vehicles, Department of
MIL36000	Military Department
DOB37000	Banking, Department of
DOI37500	Insurance, Department of
CSC38000	CT Siting Council
DCC38100	Consumer Counsel, Office of
MCO39400	Health Care Advocate, Office of
DCP39500	Consumer Protection, Department of
DOL40000	Labor, Department of

AGENCY #	AGENCY NAME
HRO41100	Human Rights & Opportunities, Commission on
OPA41200	Protection & Advocacy for Persons with Disabilities, Office of
WCC42000	Workers' Compensation Commission
DAG42500	Agriculture, Department of
DEP43000	Energy & Environmental Protection, Department of
CEQ45000	Environmental Quality, Council on
ECD46000	Economic & Community Development, Department of
AES48000	Agricultural Experiment Station
DPH48500	Public Health, Department of
CME49500	Chief Medical Examiner, Office of the
DDS50000	Developmental Services, Department of
MHA53000	Mental Health & Addiction Services, Department of
PSR56000	Psychiatric Security Review Board
DOT57000	Transportation, Department of
DSS60000	Social Services, Department of
SSM63000	Soldiers, Sailors and Marines' Fund
BRS63500	Bureau of Rehabilitative Services
SDE64000	Education, Department of
CSL66000	State Library
DHE66500	Financial and Academic Affairs for Higher Education, Office of
UOC67000	University of Connecticut
UHC72000	University of Connecticut Health Center
TRB77500	Teachers' Retirement Board
BOR77700	Board of Regents for Higher Education
DOC88000	Correction, Department of
DCF91000	Children and Families, Department of
JUD95000	Judicial Department
PCA98000	Probate Court Administration
PDS98500	Public Defender Services Commission