# How to Upgrade Your Waste Tracking with

ENERGY STAR Portfolio Manager

Thank you WasteWise, Food Recovery Challenge, and Federal Green Challenge participants for your efforts to prevent and divert waste. Although we are sunsetting these partnership programs, we hope that you will continue to engage with EPA, track your progress on improving waste and materials management, and work towards our new national goal of increasing the recycling rate to 50 percent and continuing work to reduce food waste by 50 percent by 2030.

Upgrade your waste tracking with the use of EPA's ENERGY STAR Portfolio Manager tool. Use this guide to get started tracking your waste in Portfolio Manager and learn how to quickly upload historical data.

ENERGY STAR Portfolio Manager® is the most-used energy measurement and tracking tool for commercial and multifamily buildings in the United States. It's both a management tool and metrics calculator. It is used to benchmark the performance of one building or a whole portfolio of buildings in a secure environment. EPA added a waste tracking feature to this tool that makes it easy for building managers to track waste and materials in addition to conventional utilities associated with building operations. The waste tracking feature in Portfolio Manager allows for flexibility and basic comparative analysis, recognizing that the type and quality of available waste and materials management data vary widely. Unlike the WasteWise, Food Recovery Challenge, and Federal Green Challenge modules in Re-TRAC Connect, data entered into Portfolio Manager are not submitted to EPA. EPA only looks at data in aggregate.
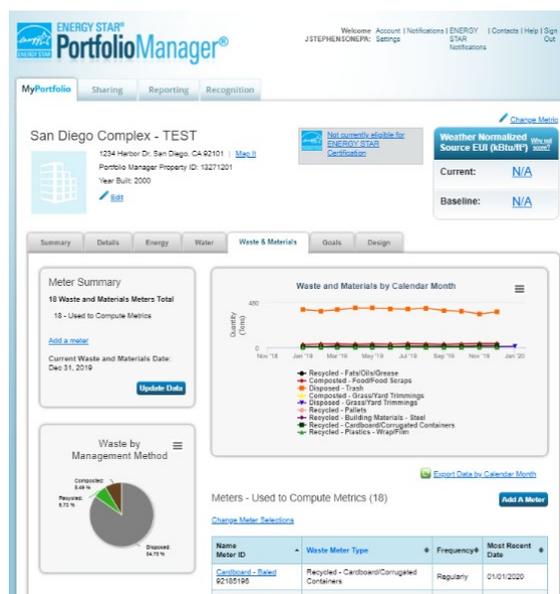
Portfolio Manager can help you more effectively manage your waste by making it easy to track, by building and across your organization, the type and amount of material you send for donation, reuse, recycling, composting, and disposal.

How to Start Tracking Your Waste in Portfolio Manager:

1. **Gather your waste data.** These data might be in a spreadsheet, dashboard, hauler invoices, or in the annual data reported for WasteWise, the Food Recovery Challenge or Federal Green Challenge that you downloaded from Re-TRAC Connect.

2. **Create a Portfolio Manager account** here: https://portfoliomanager.energystar.gov/pm/signup

   It's free and easy. Since sharing data and property/portfolio access within Portfolio Manager is easy to do, we encourage everyone to have their own account (rather than sharing a username and password among your team).

3. **Connect with others.** See if others in your organization are already using Portfolio Manager. Ask around internally. You can also search within Portfolio Manager by clicking on **Contacts** in the upper right-hand corner. Then "**Search for new contacts**." You can search by name, organization, and email address (even partial email addresses like @organization.com)
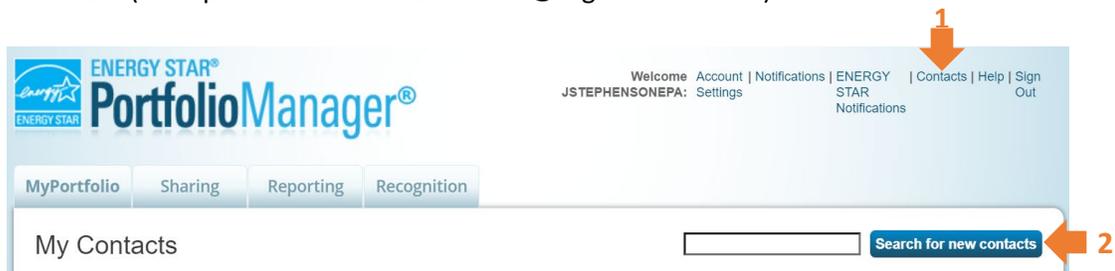
   If your organization already has its properties in Portfolio Manager, first send a connection request to a contact who has the properties in their account. Once you and the contact are connected, then request that they share the property(ies) with you. Here are detailed instructions for sharing: https://www.energystar.gov/buildings/tools-and-resources/how-share-data-other-users-portfolio-manager

4. **Add a property.** If your organization is new to Portfolio Manager, start by adding a property. Within Portfolio Manager, click on "**Add a Property**" and a short series of questions will guide you. If you need additional instructions, check out the short demonstration video: https://www.energystar.gov/buildings/training

   All the data in Portfolio Manager is entered at the property level. A property can be part of a building, a stand-alone building, or a campus of buildings. Property-level data can then be rolled up with multiple properties to represent the portfolio/organization-wide data.

5. **Add a waste meter.** Once you've added a property or you have edit access to an existing property that has been shared with you, select a property and then click on the "**waste & materials**" tab. Then click the "**Add A Meter**" button, this simply establishes a line of tracking for a material like trash or cardboard.

6. **Specify the type of material and how it's destination.** Answer the prompt questions to set up a tracking line for a material (ex. food donations, recycled cardboard) or container (ex. trash dumpster).

   Portfolio Manager tracks [29 different types of Waste/Materials](#), everything from basic trash to cooking grease to appliances.

   You can track each of these 29 Waste/Materials according to one of four different Waste Management Methods:

   1. **Recycled**
   2. **Composted**
   3. **Donated/Reused**
   4. **Disposed.** You can further categorize Disposed Waste (trash) according to one of four destinations:
      - Landfill
      - Incineration
      - Waste to energy
      - Other/Unknown

   > Within Portfolio Manager there is not a separate line of tracking for waste prevention activities. The intent is that you would see a reduction in the total waste generated resulting from the implemented waste prevention activities.

7. **Specify the frequency and how it's measured.** Continue to answer the prompt questions to identify the frequency by which the material is collected and its measured unit.

   For frequency, you can designate it as regular for materials that are picked up on an ongoing basis or intermittently for infrequent or 1-time events (like a donation of used electronics).

   You can measure materials or waste streams by weight or volume (further designating the container size, how often it is emptied, and percent fullness). For most of the material types, Portfolio Manager automatically [converts volume of the container to an estimated weight](#).

   When asked for the start date of the meter, enter the date you first started tracking data for that waste or material stream.

8. **Add data.** Once you've created a waste meter, then add data. Portfolio Manager encourages on-going, regular tracking as a management practice, so the platform is designed for monthly data entry. There are 3 ways to get data into Portfolio Manager:
   i. Manual entry
   ii. Upload data in bulk using a spreadsheet template
   iii. Have a service provider that exchanges data with Portfolio Manager via web services automatically enter your waste data. [Currently there are about a dozen services providers that offer web services for waste.]
   https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/save-energy/expert-help/find-spp/web_services

Using Spreadsheet Uploads to Import Historical Data

Spreadsheet templates allow you to quickly and easily upload data into Portfolio Manager using a few steps. You can upload data for a single meter, for multiple meters at one property, or for multiple meters across multiple properties.

Uploading Data for a Single Meter

Follow these steps to upload data for a single meter:

1. Click the **Waste & Materials** tab of your property, and then click on the **Meter name** for which you want to upload data.

2. Click **spreadsheet template** at the bottom of the page, under "Upload Data in Bulk".

3. Save the spreadsheet file that loads in your browser, and then open it to enter meter information. When you are finished entering information, save the spreadsheet to your computer. *NOTE:* Do not change any formatting in the spreadsheet, including

	A	B	C	D	E
1	Start Date (Required)	End Date (Required)	Quantity (Required)	Cost (Optional)	Estimation (Required)
2					
3	1/1/2021	1/31/2021	7.41		No
4	2/1/2021	2/28/2021	7.17		No
5	3/1/2021	3/31/2021	7.24		No
6	4/1/2021	4/30/2021	14.30		No
7	5/1/2021	5/31/2021	13.90		No
8	6/1/2021	6/30/2021	6.65		No

column headers, as this will cause an error in the upload process.

4. When you're ready to upload this file, go back to the **Manage Bills** page (where you originally generated the spreadsheet). You have two options:

   a. **Copy & Paste**. Copy your data (but not the header row), by highlighting it and selecting Ctrl+C, then **Paste** it into an empty "Start Date" field by selecting Ctrl+V. Then "**Save Bills**."

   b. **Upload File.** Browse to the completed template you saved on your computer, click Open, and then click **Upload**. Portfolio Manager then automatically enters the new meter entries for your property.

Uploading Data for Multiple Meters at One or More Properties

Follow these steps to add multiple meters and/or bills for one or more existing properties:

1. Along the left hand side of the **MyPortfolio** tab, click **Upload and/or update multiple properties**.

2. In the **Edit and Manage Information** section, click **Create an Upload Template**

3. Select the task you are performing ("Add Bills to Existing Meters") and the properties you want to include in the template. Click **Create & Download Template**.

4. Save the spreadsheet file that loads in your browser, and then open it to enter required information, such as dates and energy consumption amounts. When you are finished entering information, save the spreadsheet to your computer. *NOTE:* Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.

5. When you're ready to upload the spreadsheet, go back to the **Upload and/or update multiple properties** page. In the **Upload Spreadsheets** section, select the appropriate option from the **Type of Upload** drop-down menu. Browse for the spreadsheet you saved on your computer, click **Open**, and then click **Upload**. Portfolio Manager then automatically adds the data to your portfolio.

9. View and report your metrics.

Once you're tracking waste and material data in the tool, Portfolio Manager will automatically calculate metrics that allow for basic comparative analysis. There are 26 summary metrics for waste available in Portfolio Manager including the total volume and cost of disposed, diverted, and donated materials.
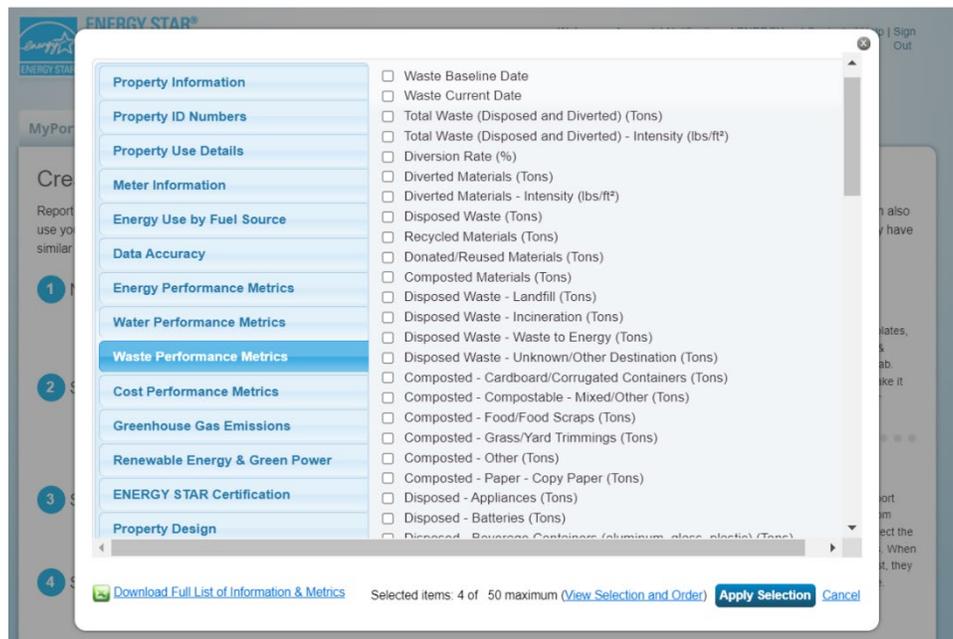
Congrats! You're now tracking waste and materials management in ENERGY STAR Portfolio Manager.

To take advantage of all the collaborative sharing and reporting features within Portfolio Manager, check out these training resources. EPA ENERGY STAR offers live webinars, short on-demand demo videos, and quick start guides.

https://www.energystar.gov/buildings/training