



# PORTFOLIO MANAGER QUICK REFERENCE GUIDE

Portfolio Manager is an interactive energy management tool that allows you to track and assess energy and water consumption across your entire portfolio of buildings in a secure online environment. Use this Quick Reference Guide to identify opportunities for energy efficiency improvements, track your progress over time, and verify results.

## IDENTIFY ENERGY EFFICIENCY PROJECTS

Use Portfolio Manager to identify under-performing buildings to target for energy efficiency improvements and establish baselines for setting and measuring progress for energy efficiency improvement projects over time.

The screenshot shows the Portfolio Manager interface for a facility named 'Fire Station 2'. It includes sections for 'General Information' (Address: 000 Blank Street, Arlington, VA 22209), 'Facility Performance' (Current Source Energy Intensity: 172.6 kWh/Sq. Ft.), and 'Space Use' (Total Floor Area: 300,000 Sq. Ft.). A red circle highlights the 'Add Space' button in the Space Use section.

STEP	ACTIVITY	ACTION
1	Access Portfolio Manager. (step not shown)	Visit <a href="http://www.energystar.gov/benchmark">www.energystar.gov/benchmark</a> . Scroll down to the <b>Login</b> section on the right-hand side in the middle of the page.
2	Access your account: (step not shown) • Create a new account. • Login to an existing account.	<ul style="list-style-type: none"> <li>• Click <b>REGISTER</b>, and follow instructions.</li> <li>• Enter user name and password, and click <b>LOGIN</b>.</li> </ul>
3	Review system updates and enter account. (step not shown)	Click <b>ACCESS MY PORTFOLIO</b> , located below <b>Welcome to Portfolio Manager</b> .
4	Add a new facility. (step not shown)	Click <b>ADD</b> a Property, located in the upper right portion of the screen.
5	Select property type and enter general facility information. (step not shown)	Select the option that most closely resembles your facility and click <b>CONTINUE</b> . Enter general data and click <b>SAVE</b> . For more information on facility space types, see: <a href="http://www.energystar.gov/index.cfm?c=eligibility.bus_portfolio_manager_space_types">www.energystar.gov/index.cfm?c=eligibility.bus_portfolio_manager_space_types</a> .
6	Enter space use data.	<p>From the <b>Facility Summary</b> page, shown above, go to the <b>Space Use</b> section, located half way down the page, and click <b>ADD SPACE</b>.</p> <ul style="list-style-type: none"> <li>• Enter a facility name. In the <b>Select a Space Type</b> menu, select the appropriate space type(s) for your building. If your space is not listed, select <b>Other</b>. Click <b>CONTINUE</b>.</li> <li>• Enter building characteristics. Click <b>SAVE</b>. Information required for each space type is listed here: <a href="http://www.energystar.gov/index.cfm?c=eligibility.bus_portfolio_manager_space_types">www.energystar.gov/index.cfm?c=eligibility.bus_portfolio_manager_space_types</a>.</li> <li>• Repeat steps above to add all major spaces in your facility.</li> </ul> <p>Use bulk import service to minimize manual data entry of large sets of facility data (10 or more facilities or campuses are required).</p> <ul style="list-style-type: none"> <li>• Go back to <b>My Portfolio</b> by clicking on the link in the upper left portion of the page.</li> <li>• Click <b>IMPORT Facility Data Using Templates</b>, located below <b>Add a Property</b>.</li> </ul>
7	Enter energy use data.	From the <b>Facility Summary</b> page, go to the <b>Energy Meters</b> section, located below the <b>Space Use</b> section, and click <b>ADD METER</b> . <ul style="list-style-type: none"> <li>• Enter meter name, type, and units. Click <b>SAVE</b>.</li> <li>• Enter number of months and start date. Click <b>CONTINUE</b>.</li> <li>• Enter energy use and cost for each month. Click <b>SAVE</b>.</li> <li>• Repeat for all energy meters and fuel types.</li> </ul>

www.energystar.gov/benchmark

**Energy STAR** **PORTFOLIO MANAGER** ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio

**Group Averages**

<b>Baseline Rating: 72</b> Facilities Included: 1	<b>Current Rating: 80</b> Facilities Included: 1
<b>Change from Baseline: Group Adjusted Percent Energy Use (%): -14.8%</b> Facilities Included: 2	

Averages are weighted by Total Floor Space.  
[More about Baselines](#)  
[More about Change from Baseline: Adjusted Energy Use](#)

[Add a Property](#)  
[Import Facility Data Using Templates](#)

**Work with Facilities**  
[Update Multiple Meters](#)  
[Share Facilities](#)  
[Request Energy Performance Report](#)

**Apply for Recognition**  
[Apply for the ENERGY STAR ENERGY STAR Leaders](#)

**Automated Benchmarking**  
[Get Started Now](#)

My Facilities **My Campuses**

GROUP: Fire Stations 8 [Create Group](#) | [Edit Group](#) | [View All](#) 9a VIEW: Summary View [Create View](#) | [Edit View](#) | [View All](#)

[Download](#) in Excel Search Facility Name:  Search

Results 1 - 2 of 2 All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

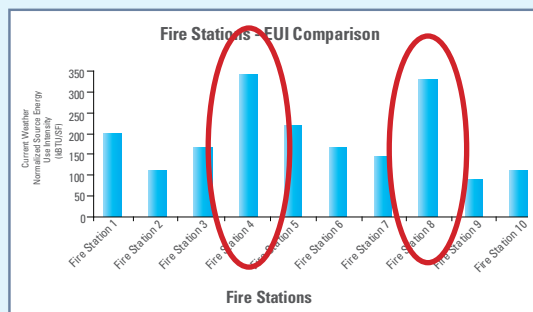
Facility Name	Current Source Energy Intensity (kBtu/Sq. Ft.)	Change from Baseline: Adjusted Energy Use (%)	Change from Baseline: Energy Use Intensity (kBtu/Sq. Ft.)	Change from Baseline: GHG Emissions (MtCO <sub>2</sub> e)	Total Energy Cost per Sq. Ft. (US Dollars (\$))
<a href="#">Fire Station 1</a>	160.1	-12.3	-6.1	-275.86	\$0.30
<a href="#">Fire Station 2</a>	172.6	-17.2	-10.7	-488.62	\$0.37

9b [Download](#) in Excel Search Facility Name:  Search

Results 1 - 2 of 2 All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

The rating is calculated by using the last day of the latest full calendar month where all meters in the facility have meter entries; the Period Ending date reflects that particular date.

STEP	ACTIVITY	ACTION
<b>8</b>	Create custom groups.	<p>Organize facilities into groups (e.g., Fire Stations, Northwest Region). Groups are completely customizable, and each facility may belong to multiple groups.</p> <ul style="list-style-type: none"> <li>From the <b>My Portfolio</b> page, click <b>CREATE GROUP</b>, located directly to the right of the <b>Group</b> drop-down menu.</li> <li>Follow instructions to select buildings and name your group.</li> <li>Once they have been saved, custom groups will be available in the <b>Group</b> drop-down menu.</li> </ul>
<b>9</b>	View and interpret results.	<p>Option 1: Go to <b>My Portfolio</b> and view all buildings to compare performance metrics.</p> <p>Option 2: Export data to Microsoft® Excel.</p> <ul style="list-style-type: none"> <li>On the <b>My Portfolio</b> page, select the view, from the <b>View</b> drop-down menu that will display the data you wish to export. The <b>My Portfolio</b> page will update to display the selected view. (9a)</li> <li>Select the <b>DOWNLOAD IN EXCEL</b> link. A File Download dialog window will open. Follow the steps provided by Excel. (9b)</li> <li>Use Excel functionality to view building energy performance graphically. The example below shows a comparison of Energy Use Intensity for a portfolio of fire stations, identifying under-performing buildings to target for energy efficiency improvements.</li> </ul>

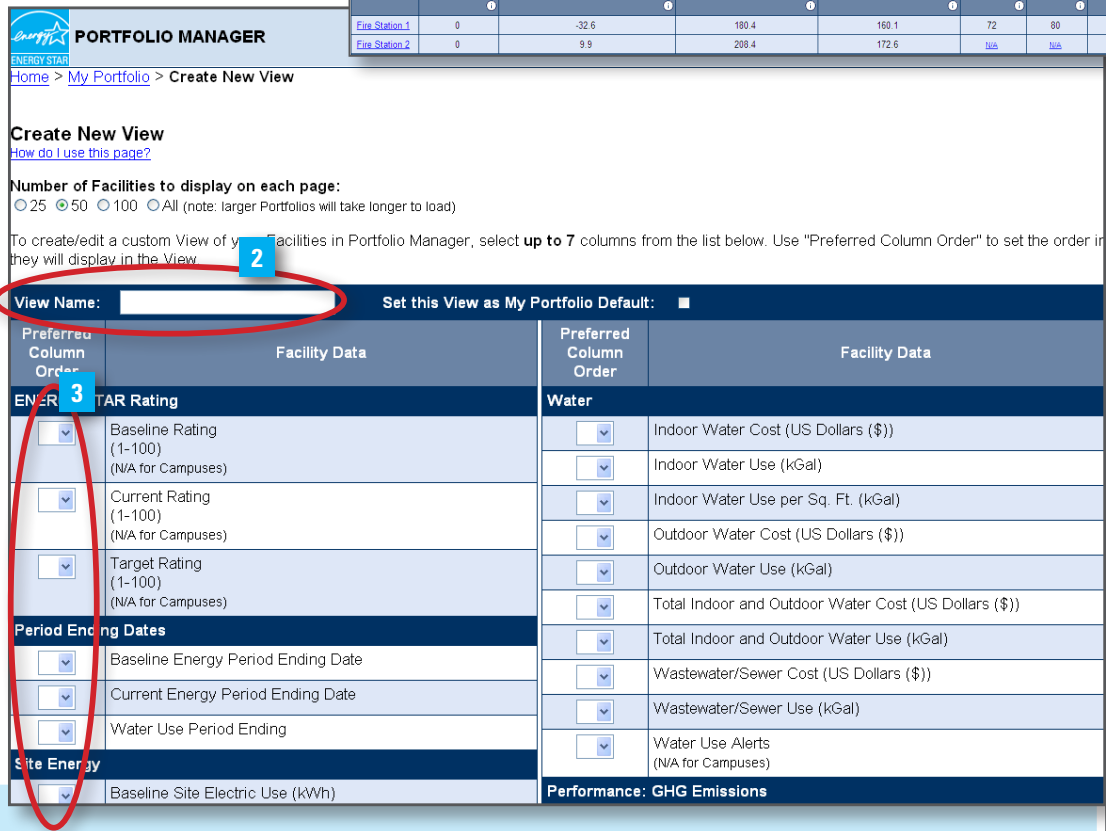
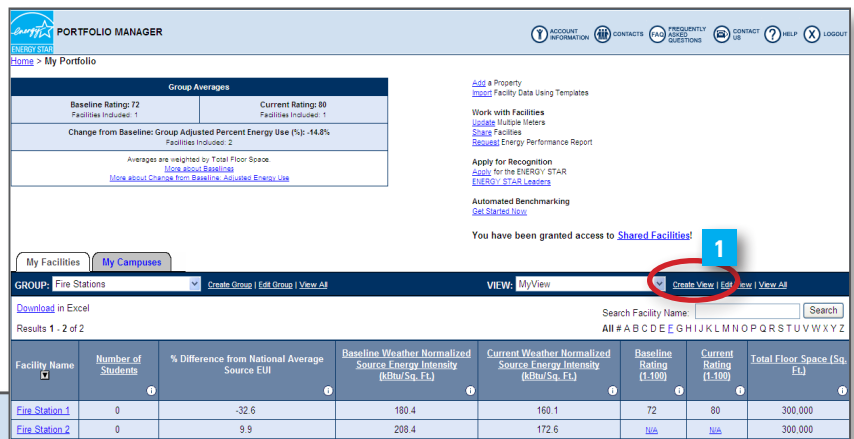


# TRACK PROGRESS OVER TIME

Portfolio Manager comes pre-populated with nine standard summary views of facility data, which are displayed on the My Portfolio summary page. These standard views include:

- Summary: Energy Use
- Performance: Green House Gas Emissions
- Performance: Financial
- Performance: Water Use

Additionally, users can create and save custom downloadable views by choosing from more than 70 different metrics. The default view set by the user will display automatically after logging into Portfolio Manager, and data from all views can be exported to Microsoft® Excel.



## CREATE A CUSTOM VIEW

### STEP ACTION

- 1 From the **My Portfolio** page or the **Facility Summary** page, select the **Create View** link, located directly to the right of the **View** drop-down menu.
- 2 Enter a name for the view. To set as the default view, select the box labeled **Set this View as My Portfolio Default**, located directly to the right of **View Name**. You may include up to 7 (seven) columns in each view.
- 3 Choose each metric to be included in the view by selecting an order number from the **Preferred Column Order** drop-down menu to the left of the **Facility Data** column.
- 4 Click **SAVE** at the bottom of the page. You will be returned to the **My Portfolio** page, and your custom view will be available in the **View** drop-down menu. (step not shown)

# VERIFY AND DOCUMENT RESULTS

Use Portfolio Manager to quickly and accurately document reductions in energy use, greenhouse gas emissions, water use, and energy costs for an individual building or an entire portfolio. This valuable information can be used to provide a level of transparency and accountability to help demonstrate strategic use of funding.

Generate a Statement of Energy Performance that includes valuable information about your building's performance, including:

- Normalized energy use intensity
- National average comparisons
- Greenhouse gas emissions
- Energy performance rating (if available)

In addition, you can also request an Energy Performance Report to see the change in performance over time for selected buildings or an entire portfolio. Available comparative metrics in this report include:

- Normalized energy use intensity
- Total electric use
- Total natural gas use
- Energy performance rating (if available)

OMB No. 2050-0347

## STATEMENT OF ENERGY PERFORMANCE Fire Station 2

**4** Building ID: 1642681  
For 12-month Period Ending: December 31, 2008  
Date SEP becomes ineligible: N/A Date SEP Generated: March 05, 2009

Facility Fire Station 2 000 Blank Street Arlington, VA 22209	Facility Owner N/A	Primary Contact for this Facility N/A
Year Built: 1990 Gross Floor Area (ft <sup>2</sup> ): 300,000	<b>Energy Intensity<sup>5</sup></b> Site (kBtu/ft <sup>2</sup> /yr) 52 Source (kBtu/ft <sup>2</sup> /yr) 173  <b>Emissions (based on site energy use)</b> Greenhouse Gas Emissions (MTCO <sub>2</sub> e/year) 2,352	
Energy Performance Rating <sup>2</sup> (1-100)		
<b>Site Energy Use Summary<sup>3</sup></b> Electricity (kBtu) Natural Gas (kBtu) <sup>4</sup> Total Energy (kBtu) 15,600,000		
<b>Energy Intensity<sup>5</sup></b> Site (kBtu/ft <sup>2</sup> /yr) 52 Source (kBtu/ft <sup>2</sup> /yr) 173		
<b>Emissions (based on site energy use)</b> Greenhouse Gas Emissions (MTCO <sub>2</sub> e/year) 2,352		
<b>Electric Distribution Utility</b> Virginia Electric & Power Co		
<b>National Average Comparison</b> National Average Site EUI 78 National Average Source EUI 157 % Difference from National Average Source EUI 10% Building Type Fire Station/Police Station		
<b>Meets Industry Standards<sup>6</sup> for Indoor Environmental Conditions:</b> Ventilation for Acceptable Indoor Air Quality N/A Acceptable Thermal Environmental Conditions N/A Adequate Illumination N/A	Certifying Professional N/A  Stamp of Certifying Professional Based on the conditions observed at the time of my visit to this building, I certify that the information contained within this statement is accurate.	

Notes:  
1. Application for the ENERGY STAR must be submitted to EPA within 4 months of the Period Ending date. Award of the ENERGY STAR is not final until approval is received from EPA.  
2. The EPA Energy Performance Rating is based on total source energy. A rating of 75 is the minimum to be eligible for the ENERGY STAR.  
3. Values represent energy consumption, annualized to a 12-month period.  
4. Natural Gas values in units of volume (e.g. cubic feet) are converted to sites with adjustments made for elevation based on Facility zip code.  
5. National Gas values in units of volume (e.g. cubic feet) are converted to sites with adjustments made for elevation based on Facility zip code.  
6. Includes requirements for ASHRAE 90.1-2001, ASHRAE 62.1-2001, and ASHRAE 90.1-2001, and IESNA Lighting Handbook for lighting quality.

PORTFOLIO MANAGER

ENERGY STAR

Home > My Portfolio > Fire Station 2

Facility Summary: Fire Station 2

Building ID: 1642681

Level of Access: Building Data Administrator

Electric Distribution Utility: Virginia Electric & Power Co

Regional Power Grid: SERC Virginia/Carolina

Select my Power Generation Plant to calculate my electric emissions rate

Electric Emissions Rate (lbsCO<sub>2</sub>/yr) 151.7 (what is this?)

**1** Generate a Statement of Energy Performance for uses other than applying for the ENERGY STAR

General Information	
Address: 000 Blank Street, Arlington, VA 22209	
Year Built: 1990	
Property Type: Single Facility	
Baseline Rating: N/A	Current Rating: N/A
Eligibility for the ENERGY STAR	
N/A	

## GENERATE A STATEMENT OF ENERGY PERFORMANCE AND AN ENERGY PERFORMANCE REPORT

STEP	ACTION
<b>1</b>	From your selected building's <b>Facility Summary</b> page, click <b>GENERATE A STATEMENT OF ENERGY PERFORMANCE</b> .
<b>2</b>	On the next page, select a period ending date. (step not shown)
<b>3</b>	Click <b>GENERATE REPORT</b> , located in the bottom right corner of the screen. (step not shown)
<b>4</b>	Save the Statement of Energy Performance, accompanying Data Checklist, and Facility Summary that include information on energy use intensity and greenhouse gas emissions.
<b>5</b>	From the <b>My Portfolio</b> page, click <b>REQUEST ENERGY PERFORMANCE REPORT</b> , located under <b>Work with Facilities</b> , which shows reductions in key performance indicators over a user-specified time period. Specify the type of report, the facilities to be included, and the requested report columns. The report will be e-mailed to a user-specified address within one business day. (step not shown)