



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 'Facility Summary' page for 'Fire Station 2'. The 'General Information' section includes address, year built, and property type. The 'Facility Performance' section shows energy intensity and emissions data. The 'Space Use' section lists building spaces with a red circle and number 6 highlighting the 'Add Space' button. The 'Energy Meters' section lists meters with a red circle and number 7 highlighting the 'Add Meter' button.

STEP	ACTIVITY	ACTION
1	Access Portfolio Manager. (step not shown)	Visit www.energystar.gov/benchmark . Scroll down to the Login 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.	• Click REGISTER, and follow instructions. • Enter user name and password, and click LOGIN.
3	Review system updates and enter account. (step not shown)	Click ACCESS MY PORTFOLIO , located below Welcome to Portfolio Manager .
4	Add a new facility. (step not shown)	Click ADD 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 CONTINUE . Enter general data and click SAVE . For more information on facility space types, see: www.energystar.gov/index.cfm?c=eligibility.bus_portfolio/portfolio_manager_space_types .
6	Enter space use data.	From the Facility Summary page, shown above, go to the Space Use section, located half way down the page, and click ADD SPACE . • Enter a facility name. In the Select a Space Type menu, select the appropriate space type(s) for your building. If your space is not listed, select Other. Click CONTINUE. • Enter building characteristics. Click SAVE. Information required for each space type is listed here: www.energystar.gov/index.cfm?c=eligibility.bus_portfolio/portfolio_manager_space_types. • Repeat steps above to add all major spaces in your facility. Use bulk import service to minimize manual data entry of large sets of facility data (10 or more facilities or campuses are required). • Go back to My Portfolio by clicking on the link in the upper left portion of the page. • Click IMPORT Facility Data Using Templates, located below Add a Property.
7	Enter energy use data.	From the Facility Summary page, go to the Energy Meters section, located below the Space Use section, and click ADD METER . • Enter meter name, type, and units. Click SAVE. • Enter number of months and start date. Click CONTINUE. • Enter energy use and cost for each month. Click SAVE. • Repeat for all energy meters and fuel types.

PORTFOLIO MANAGER

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[Home](#) > **My Portfolio**

Group Averages

Baseline Rating: 72 Facilities Included: 1	Current Rating: 80 Facilities Included: 1
Change from Baseline: Group Adjusted Percent Energy Use (%): -14.8% 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](#)
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[Apply for the ENERGY STAR ENERGY STAR Leaders](#)

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My Facilities
My Campuses

GROUP: Fire Stations

8

VIEW: Summary View

9a

[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 ₂ e)	Total Energy Cost per Sq. Ft. (US Dollars (\$))
Fire Station 1	160.1	-12.3	-6.1	-275.86	\$0.30
Fire Station 2	172.6	-17.2	-10.7	-488.62	\$0.37

[Download](#) in Excel

9b

Search Facility Name:

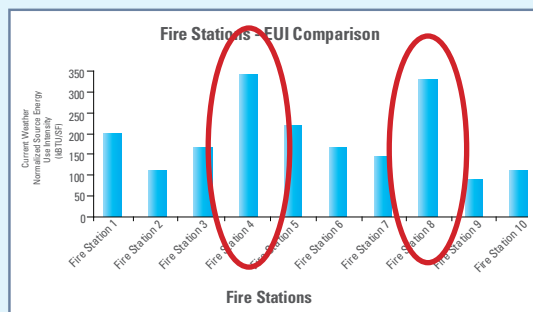
Search

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
8	Create custom groups.	Organize facilities into groups (e.g., Fire Stations, Northwest Region). Groups are completely customizable, and each facility may belong to multiple groups. - From the My Portfolio page, click CREATE GROUP, located directly to the right of the Group drop-down menu. - Follow instructions to select buildings and name your group. - Once they have been saved, custom groups will be available in the Group drop-down menu.
9	View and interpret results.	Option 1: Go to My Portfolio and view all buildings to compare performance metrics. Option 2: Export data to Microsoft® Excel. - On the My Portfolio page, select the view, from the View drop-down menu that will display the data you wish to export. The My Portfolio page will update to display the selected view. (9a) - Select the DOWNLOAD IN EXCEL link. A File Download dialog window will open. Follow the steps provided by Excel. (9b) - 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.



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.

PORTFOLIO MANAGER

Home > My Portfolio

GROUP: Fire Stations | Create Group | Edit Group | View All

VIEW: MyView | Create View | Edit View | View All

Download in Excel

Results 1 - 2 of 2

Facility Name	Number of Students	% Difference from National Average Source EUI	Baseline Weather Normalized Source Energy Intensity (kBtu/Sq. Ft.)	Current Weather Normalized Source Energy Intensity (kBtu/Sq. Ft.)	Baseline Rating (1-100)	Current Rating (1-100)	Total Floor Space (Sq. Ft.)
Fire Station 1	0	-32.6	180.4	160.1	72	80	300,000
Fire Station 2	0	9.9	208.4	172.6	N/A	N/A	300,000

PORTFOLIO MANAGER

Home > My Portfolio > Create New View

Create New View
How do I use this page?

Number of Facilities to display on each page:
☐ 25 ☒ 50 ☐ 100 ☐ All (note: larger Portfolios will take longer to load)

To create/edit a custom View of your facilities in Portfolio Manager, select **up to 7** columns from the list below. Use "Preferred Column Order" to set the order in which they will display in the View.

View Name: **Set this View as My Portfolio Default:** ☐

Preferred Column Order	Facility Data	Preferred Column Order	Facility Data
ENER	ENERGY STAR Rating		Water
☐	Baseline Rating (1-100) (N/A for Campuses)	☐	Indoor Water Cost (US Dollars (\$))
☐	Current Rating (1-100) (N/A for Campuses)	☐	Indoor Water Use (kGal)
☐	Target Rating (1-100) (N/A for Campuses)	☐	Indoor Water Use per Sq. Ft. (kGal)
	Period Ending Dates	☐	Outdoor Water Cost (US Dollars (\$))
☐	Baseline Energy Period Ending Date	☐	Outdoor Water Use (kGal)
☐	Current Energy Period Ending Date	☐	Total Indoor and Outdoor Water Cost (US Dollars (\$))
☐	Water Use Period Ending	☐	Total Indoor and Outdoor Water Use (kGal)
	Site Energy	☐	Wastewater/Sewer Cost (US Dollars (\$))
☐	Baseline Site Electric Use (kWh)	☐	Wastewater/Sewer Use (kGal)
		☐	Water Use Alerts (N/A for Campuses)
			Performance: GHG Emissions

CREATE A CUSTOM VIEW

STEP ACTION

- 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.
- 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.
- 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.
- 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

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 (ft²): 300,000	Energy Intensity⁵ Site (kBtu/ft²/yr) 52 Source (kBtu/ft²/yr) 173	
Energy Performance Rating ² (1-100)	Emissions (based on site energy use) Greenhouse Gas Emissions (MTCO ₂ e/year) 2,352	
Site Energy Use Summary³ Electricity (kBtu) 15,500,000 Natural Gas (kBtu) ⁴ Total Energy (kBtu)		
Energy Intensity⁵ Site (kBtu/ft²/yr) 52 Source (kBtu/ft²/yr) 173		
Emissions (based on site energy use) Greenhouse Gas Emissions (MTCO ₂ e/year) 2,352		
Electric Distribution Utility Virginia Electric & Power Co		
National Average Comparison National Average Site EUI 78 National Average Source EUI 157 % Difference from National Average Source EUI 10% Building Type Fire Station/Police Station		
Meets Industry Standards⁶ for Indoor Environmental Conditions: Ventilation for Acceptable Indoor Air Quality N/A Acceptable Thermal Environmental Conditions N/A Adequate Illumination N/A		
Notes: 1. Application for the ENERGY STAR award is submitted by 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 kBtu with adjustments made for elevation based on Facility zip code. 5. Intensity values are calculated as follows: Intensity = Total Energy / Gross Floor Area. 6. See ASHRAE 90.1-2001, Section 9.1 for more information.		
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.		
Certifying Professional N/A		

ENERGY STAR **PORTFOLIO MANAGER**

Home > My Portfolio > Fire Station 2

Facility Summary: **Fire Station 2**
How do I use this page?

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 (lbCO₂/kWh) 151.7 (what is this?)

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

General Information Edit	
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
1	From your selected building's Facility Summary page, click GENERATE A STATEMENT OF ENERGY PERFORMANCE .
2	On the next page, select a period ending date. (step not shown)
3	Click GENERATE REPORT , located in the bottom right corner of the screen. (step not shown)
4	Save the Statement of Energy Performance, accompanying Data Checklist, and Facility Summary that include information on energy use intensity and greenhouse gas emissions.
5	From the My Portfolio page, click REQUEST ENERGY PERFORMANCE REPORT , located under Work with Facilities , 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)