ENERGY STAR® PortfolioManager®

Portfolio Manager® Quick Start Guide

EPA's ENERGY STAR Portfolio Manager tool helps you measure and track energy use, water use, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the results to identify under-performing buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance. Follow the steps in this guide to get started using the new Portfolio Manager to benchmark your properties, assess performance, and view results.

> ### Getting Started
>
> Step 1: *Add a Property*
> Step 2: *Enter Energy & Water Data*
> Step 3: *View Results & Progress*

1 Add a Property

To get started, log in to Portfolio Manager at www.energystar.gov/benchmark. Then, follow these instructions to create a property and to enter property information.

1. Click **Add a Property** on the **MyPortfolio** tab.
2. Answer questions about your property and click **Get Started!**
3. Enter basic property information and select the boxes next to the statements that apply to your property. Then click **Continue**.
4. Enter use details such as gross floor area, operating hours, and number of workers for each type of use. You can use default or temporary values at this time and enter more accurate data later. **NOTE:** Mouse over the use detail to see a definition.
5. Click **Add Property**. When you have successfully added your property, you will see the property's **Summary** tab.

> ### Property Types
>
> All property types can be benchmarked. For properties with multiple buildings only hospitals, hotels, K-12 schools, and senior care communities are eligible to receive the 1 – 100 ENERGY STAR score.

If you have additional types of uses on the property, you can add them at any time.

1. Click the property's **Details** tab, and then select a use type from the **Add Another Type of Use** drop-down menu. Click **Add**.
2. Enter use details for the property and then click **Save Use**.

> ### Properties with Multiple Use Types
>
> Some properties include multiple use types, such as restaurants in hotels, salons in senior care communities, and cafeterias in hospitals. As a general rule, if a certain use commonly occurs in the type of property being benchmarked, simply include it in the square footage of the building's primary use. You do not need to add another type of use.

2 Enter Energy & Water Data

To receive an accurate picture of your building's performance, you need to tell Portfolio Manager how much and what kind of energy and water your building consumes. Follow these steps to enter energy and water data for your property.

1. Click on your property from the **My**Portfolio** tab and then select the **Meters** tab.
2. Click **Add Another Meter**.
3. Select the sources of your property's energy and your property's water usage, identify the number of meters, and then click **Get Started!**
4. Click on a meter to enter units and first bill date. If it is a bulk fuel purchase, select the **Enter as Delivery?** checkbox. Then click **Continue**.
5. Click the gray arrow next to each meter to expand the section on the **Your Meter Entries** page. Click **Add Another Entry** under the meter and enter data. Check **Estimation** if you are not including measured data for the entry.
6. Click **Finish Meter Set Up** when you have finished entering information for each meter.
7. Select the boxes of the meters that total your property's energy and water use on the **Meters to Add to Total Consumption** page. Click **Apply Selections**.

3 View Results & Progress

It is easy for you to see trends and to track improvement for your entire portfolio of buildings with a variety of standard graphs and reports in Portfolio Manager. Follow these steps to view reports about your properties and to assess progress.

✓ Click the **Reporting** tab to view graphs and reports for a property or portfolio.

✓ Click on the **Charts & Graphs** options to instantly see colorful graphs of how your portfolio or group of properties is performing. You can print graphs or download the images to incorporate into a presentation or document.

✓ View the **Templates & Reports** section to see a list of available standard reports, including Performance Highlights, Energy Performance, and Water Performance. Select **Generate New Report** from the **Action** drop-down menu to create a spreadsheet.

Learn More!

To learn more about Portfolio Manager, visit www.energystar.gov/benchmark.
To get answers to your questions, visit www.energystar.gov/buildingshelp.