



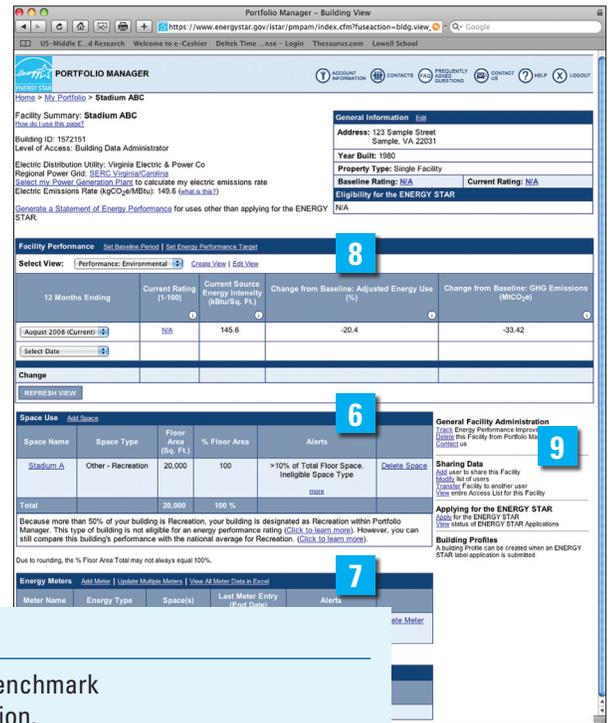
# PORTFOLIO MANAGER • QUICK REFERENCE GUIDE

## BUILDINGS THAT CAN NOT RECEIVE A 1-100 RATING

### Tracking Your Energy Performance

Portfolio Manager is an online, interactive energy management tool that allows you to measure and track your building's energy and water consumption, identify investment priorities, and verify improvements over time. All commercial buildings – including commercial space types for which ENERGY STAR® does not currently provide a 1-100 energy performance rating<sup>1</sup> – can use Portfolio Manager to track weather-normalized energy use intensity (EUI), energy costs, greenhouse gas emissions, and water consumption.

## USE PORTFOLIO MANAGER STEP-BY-STEP



STEP	ACTIVITY	ACTION															
1	Access Portfolio Manager	<a href="http://www.energystar.gov/benchmark">http://www.energystar.gov/benchmark</a> Scroll down to the Login section.															
2	Access your account <ul style="list-style-type: none"> <li>Create a new account</li> <li>Login to an existing account</li> <li>Get a brief system overview</li> </ul>	<ul style="list-style-type: none"> <li>Click REGISTER.</li> <li>Enter user name and password and click LOGIN.</li> <li>TAKE THE PORTFOLIO MANAGER TOUR to learn more.</li> </ul>															
3	Review system updates and enter into account	Click ACCESS MY PORTFOLIO.															
4	Add a new facility	Click ADD a Property.															
5	Select property type and enter general facility information	Select the option that most closely resembles your facility and click CONTINUE. Enter general data and click SAVE.															
6	Enter space use data <table border="1" data-bbox="170 1465 581 1602"> <thead> <tr> <th>Space Name</th> <th>Space Type</th> <th>Floor Area (Sq. Ft.)</th> <th>% Floor Area</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td>Stadium A</td> <td>Other - Recreation</td> <td>20,000</td> <td>100</td> <td>&gt;10% of Total Floor Space. Ineligible Space Type</td> </tr> <tr> <td>Total</td> <td></td> <td>20,000</td> <td>100 %</td> <td></td> </tr> </tbody> </table>	Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	Stadium A	Other - Recreation	20,000	100	>10% of Total Floor Space. Ineligible Space Type	Total		20,000	100 %		Go to "Space Use" section and click ADD SPACE. <ul style="list-style-type: none"> <li>Enter a facility name. In the "Select a Space Type" menu, select "Other." Enter an effective date. Click CONTINUE.</li> <li>Using the "Select an Other space type" menu, select the space type that matches your facility.</li> <li>Enter space data. Click SAVE.</li> </ul>
Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts													
Stadium A	Other - Recreation	20,000	100	>10% of Total Floor Space. Ineligible Space Type													
Total		20,000	100 %														
7	Enter energy use data <table border="1" data-bbox="170 1690 581 1764"> <thead> <tr> <th>Meter Name</th> <th>Energy Type</th> <th>Space(s)</th> <th>Last Meter Entry (End Date)</th> <th>Alerts</th> </tr> </thead> <tbody> <tr> <td>Electric</td> <td>Electricity (kWh)</td> <td>Entire Facility</td> <td>08/31/2008</td> <td>Data &gt; 120 days old.</td> </tr> </tbody> </table>	Meter Name	Energy Type	Space(s)	Last Meter Entry (End Date)	Alerts	Electric	Electricity (kWh)	Entire Facility	08/31/2008	Data > 120 days old.	Go to "Energy Meters" section and click ADD METER. <ul style="list-style-type: none"> <li>Enter Meter name, type, and units. Click SAVE.</li> <li>Enter number of months and start date. Click CONTINUE.</li> <li>Enter energy use and cost. Click SAVE.</li> </ul> Repeat for all energy meters and fuel types.					
Meter Name	Energy Type	Space(s)	Last Meter Entry (End Date)	Alerts													
Electric	Electricity (kWh)	Entire Facility	08/31/2008	Data > 120 days old.													
8	Review and interpret results	Go to "Facility Performance" section and review your results. Guidance is provided on page two of this guide.															
9	Manage account	Share data and perform other administrative tasks.															

www.energystar.gov/benchmark

<sup>1</sup> Commercial spaces for which ENERGY STAR currently offers a 1-100 rating are: offices, bank branches, financial centers, retail stores, courthouses, hospitals, hotels, k-12 schools, medical offices, supermarkets, dormitories, and warehouses.

## GUIDANCE ON ENTRY OF SPACE TYPES AS "OTHER"

Spaces for which ENERGY STAR does not currently provide a 1-100 rating, such as the examples shown below, should benchmark using the "Other" space type:

- Assisted Living Facilities
- Malls
- Convention Centers
- Movie Theatres
- Higher Education Buildings
- Restaurants
- Laboratories
- Stadiums and Arenas
- Libraries

## SOURCE EUI INTERPRETATION

Review your calculated annual source EUI, and compare it to the national average source EUI for your building type or across your portfolio. This information can be found on your Statement of Energy Performance. Then, set improvement goals and create an action plan. Use the guidance below to determine the appropriate next steps.

- Below average** Greatest opportunity for improvement. Investments in new equipment, combined with aggressive low-cost operations and maintenance practices could have the greatest impact on your bottom line.
- Average** Significant opportunities to reap savings. Simple, low-cost operations and maintenance practices, combined with equipment upgrades, could yield significant savings.
- Above average** Opportunity to demonstrate best practices. Continue to improve and maintain superior performance by focusing on operations and maintenance.

## HELPFUL HINTS

- Enter 12 consecutive months of energy data for all fuel types (e.g. electricity, natural gas) without gaps in time.
- When entering data, there is no need to include commas or other punctuation.
- When inputting a facility's energy use, be sure to select the correct units of measurement.
-  **FREQUENTLY ASKED QUESTIONS** View answers to Frequently Asked Questions.
-  **CONTACTS** Maintain contact information for your energy team.
-  **CONTACT US** Use this option or e-mail [buildings@energystar.gov](mailto:buildings@energystar.gov).
-  **HELP** Access user-support information and get answers.

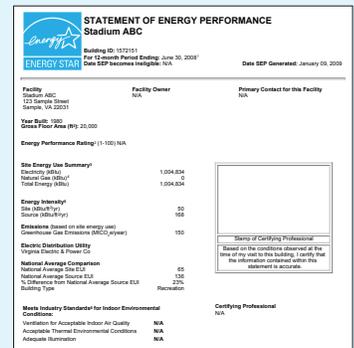
## DATA NEEDED

- Building address including zip code
- Gross floor area
- At least 12 consecutive months of energy use for all fuel types
- Examples of optional information to be tracked are: number of PCs, operating hours per week, number of workers on main shift, and energy costs

## FEATURES

- Share facilities across accounts.** From the My Portfolio page, go to "Sharing Data" section and click **ADD**. Select user from current address list, enter a new Portfolio Manager name, or select a Portfolio Manager Account to share with.

- Generate a Statement of Energy Performance and Facility Summary Report.** Review your facility's energy performance and environmental impact for a 12-month period and against a baseline. Use it as a management report and transactional document. From the Facility Summary page, click **GENERATE A STATEMENT OF ENERGY PERFORMANCE** and select a period ending date. Check "Statement of Energy Performance" and "Facility Summary" under Report Options, and click **GENERATE REPORT**.



STATEMENT OF ENERGY PERFORMANCE	
Stadium ABC	
Building ID: 1234567	Facility Owner: N/A
Facility Name: 123 Stadium Street, Memphis, TN 38203	Primary Contact for this Facility: N/A
Year Built: 1980	Date SEP Generated: January 09, 2010
Gross Floor Area (SF): 20,000	
Energy Performance Rating: (1-100) N/A	
<b>Site Energy Use Summary*</b>	
Electricity (kWh)	1,004,634
Natural Gas (MMBtu)	1,004,634
Total Energy (MMBtu)	1,004,634
<b>Energy Intensity†</b>	
Site (kBtu/SqFt)	50
Source (kBtu/SqFt)	50
<b>Embodied Carbon (Based on site energy and Commercial Gas Emissions (MMTCO<sub>2</sub> per year))</b>	
	100
<b>Electric Distribution Utility</b>	
Utility Name: E-POWER CO	50
<b>National Average Comparison</b>	
National Average Site EUI	100
National Average Source EUI	100
% Difference from National Average Source EUI	22%
Building Type	Recreation
<b>Meets Industry Standard for Indoor Environmental Conditions</b>	
Verification for Acceptable Indoor Air Quality	N/A
Acceptable Thermal Environmental Conditions	N/A
Adequate Illumination	N/A
Certifying Professional: N/A	

- Customize Your Facility Performance View.** Portfolio Manager offers pre-set views to compare buildings to commonly used metrics. From the Facility Summary page, go to "Facility Performance" and choose an option from the "Select View" menu. You can also tailor your view by clicking **CREATE VIEW**.
- Track Water Use.** From the Facility Summary page, go to the "Water Meters" section below the "Energy Meters" section. Click **ADD METER** and follow steps to get started.
- Additional Guidance.** For more detailed guidance on using Portfolio Manager, register for live or recorded trainings on the ENERGY STAR Web site at [www.energystar.gov/training](http://www.energystar.gov/training).