

# An Overview of Portfolio Manager

EPA’s ENERGY STAR Portfolio Manager tool helps you measure and track the energy and water use, waste and materials, 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.

By entering details about your property and consumption data, you can:

- Assess whole building energy performance.
- Track changes in energy, water, waste, greenhouse gas emissions, and cost over time.
- Track green power purchases.
- Create custom reports.
- Share data with others.

Learn more about the tool’s features and functionalities!

## Navigate with Ease

The Portfolio Manager user interface is streamlined and simple to navigate, and the tubular format allows you to easily switch between views at the property and portfolio levels.

**NOTE:** Take advantage of built-in checks, alerts, and tips, which will help you to improve the quality of your data. Portfolio Manager looks for your data anomalies to help you identify possible typos, incorrect meter entries, missing information, and other common data entry problems.

## Expanded Options for Property Type

All property types can use Portfolio Manager to measure and track energy, water, and waste. The tool contains an expanded list of property types – 85 total – offering more specific categorization to facilitate comparison among properties.



Figure 1: MyPortfolio landing page.

## Enter Data Using Built-In Wizards

If you are a beginner user or need some assistance, Portfolio Manager has built-in wizards to help you add a property or an energy, water, or waste meter. The tool will help you along the way, asking questions about your data and guiding you through data entry and other actions.

### Tips

Tips are provided throughout the tool and contain relevant information and links to help guide you through data entry processes.

**Set up a Property: Let's Get Started!**

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!

**Your Property Type**  
We'll get into the details later. For now, overall, what main purpose does your property serve?  
Select a property type [dropdown]  
[Learn more about Property Types.](#)

**Your Property's Buildings**  
How many physical buildings do you consider part of your property?  
 None: My property is part of a building (e.g., a Tenant Space)  
 One: My property is a single building  
 More than One: My property includes multiple buildings ([Campus Guidance](#))  
 How many? [input]

**Your Property's Construction Status**  
Is your property already built or are you entering this property as a construction project that has not yet been completed?  
 Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.  
 Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.  
 Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

**Tip**  
To set up a property, you'll need information such as gross floor area and operating hours.

**Tip**  
Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

**Test Properties**  
You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending on what your needs are. This can be configured on your [Account Settings](#).

**Get Started!** [Cancel](#)

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Figure 2: Setting up a Property screenshot.

## Connect & Share with Others

Connecting with other users and sharing data is easy to do in Portfolio Manager! First, connect with Portfolio Manager users, just like you would in any social networking application. Then, share one building with one user, or multiple buildings with multiple users at one time, with just a few clicks of the mouse - all while specifying which information others can see and modify. You can share your properties, performance documents, and reports with your Portfolio Manager connections. To learn more, please review the guide [How to Share Properties with Other Portfolio Manager Users](#), or view the short video [How to Share Properties in Portfolio Manager](#).

## Plan & Set Goals

Portfolio Manager includes tabs specifically for planning and goal setting. These tabs allow you to:

- Set targets and baselines for your entire portfolio or for individual buildings.
- Identify properties that reach a particular target.
- View performance tables with current and baseline performance information and median and target levels.
- Note other certifications (e.g. LEED, Green Globes)
- Track your energy projects.

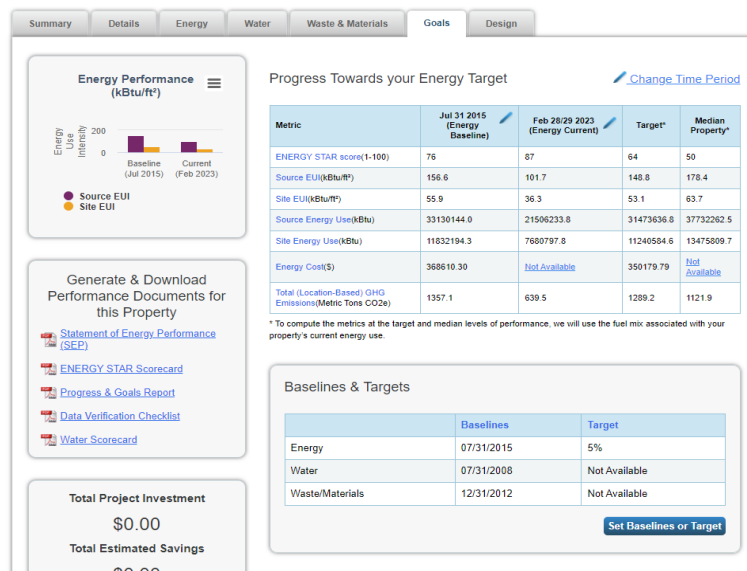


Figure 3: View of the Goals tab within a specific property.

## Display Data in Colorful Charts & Graphs

Share your progress with others in your organization with reports, charts, and graphs that are colorful and easy to generate. Portfolio Manager has several built-in report options, as well as functionality to create your own custom reports.

## Use Design Features

In addition to assessing the performance of your existing buildings, you can also evaluate the anticipated energy performance of your new building design projects, right within your Portfolio Manager account. Use Portfolio Manager design features to:

- Save energy and property information of your new building design project for future comparison against actual performance.
- Compare your energy estimates with your design target and the national median for your property type.
- Compare between estimated, as designed and actual energy consumption once the property is built and occupied.



Figure 4: Visual display of design reports.

- Generate documentation for “Designed to Earn the ENERGY STAR” recognition. For more information please see the step-by-step guide [How to Apply for the Designed to Earn the ENERGY STAR Recognition](#).

## Apply for the ENERGY STAR Certification

Portfolio Manager includes a widget that helps you track progress through the ENERGY STAR application process. There are prominent notifications on application status and a checklist that shows completed steps. Additionally, you can revise and generate applications without having to contact User Support, and you can submit applications electronically directly from within Portfolio Manager without having to mail them in. For more information, please see the step-by-step guide [How to Apply for ENERGY STAR Certification](#).

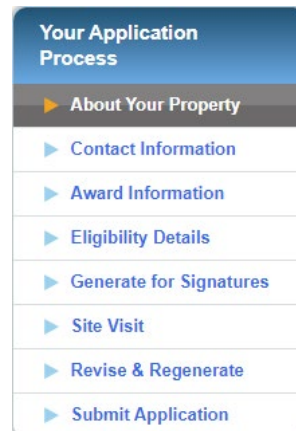


Figure 5: Tracking your ENERGY STAR application.



### Learn More!

- About Portfolio Manager: [energystar.gov/benchmark](http://energystar.gov/benchmark)
- ENERGY STAR Guide for Licensed Professionals [energystar.gov/LPGuide](http://energystar.gov/LPGuide)
- ENERGY STAR for Buildings: [energystar.gov/buildings](http://energystar.gov/buildings)