Portfolio Manager 101: Navigating Portfolio Manager, Adding a New Property and Entering Use Details, Analyzing Progress Using

Learning Objectives

In this session, you will become familiar with EPA's ENERGY STAR® Portfolio Manager® tool and learn how to:

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Analyze progress using performance documents, charts and graphs and reports

Note: ENERGY STAR also has short 5-minute videos on these introductory topics available for quick view at www.energystar.gov/buildings/training

ENERGY STAR® PortfolioManager®

Management Tool

Assess whole building energy and water consumption, plus waste

Track green power purchase

Share/report data with others

Track changes in energy, water, greenhouse gas emissions, and cost over time

Create custom reports

Apply for ENERGY STAR certification

ENERGY STAR® PortfolioManager®

Hundreds of metrics, including:

Energy use Source, site, weather normalized, demand

Water use Water use intensity, Water Score (for Multifamily)

Waste & Materials Waste intensity, diversion rate

1-100 ENERGY STAR score

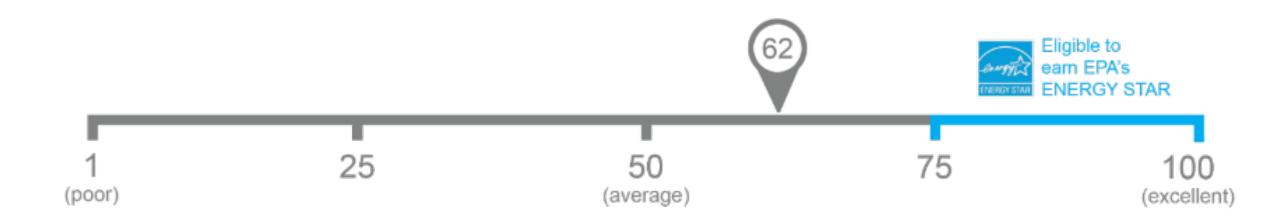**GHG emissions** Indirect, direct, total, avoided

Benchmarking is the process of comparing use to gain valuable perspective about building performance

Use Portfolio Manager to:	Energy	Water	Waste & Materials
Establish a baseline:	✓	✓	✓
• Compare current use to baseline over time.	✓	✓	✓
• Compare median of national sample of similar buildings to baseline.	✓		
• Compare normalized national sample of similar buildings to baseline.	✓ (ENERGY STAR 1-100 Score)	✓ (Multifamily 1-100 Score)	
Set target reduction goal.	✓		
Compare properties in portfolio to each other.	✓	✓	✓
Apply for recognition (eligible space types).	✓ (ENERGY STAR Certification)		

ENERGY STAR

The 1-100 ENERGY STAR Score

62

1 (poor) 25 50 (average) 75 100 (excellent)

Eligible to earn EPA's ENERGY STAR

One simple number
understood by ALL stakeholders.

Property types with 1-100 ENERGY STAR scores

Bank Branch

Barracks*

Convenience Stores

Courthouses

Data Centers

Distribution Centers

Financial Offices

Hospitals

Hotels

K-12 Schools

Medical Offices

Multifamily Housing

Office Buildings

Residence Hall/Dormitory*

Retail Stores

Senior Living Communities

Single-Family Homes*

Supermarkets

Vehicle Dealerships

Warehouses

Wastewater Treatment Plants*
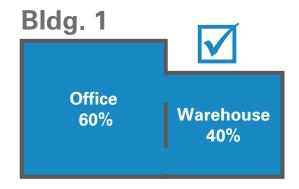

Wholesale club/ Supercenters

Worship Facilities

ENERGY STAR Score for Multi-Use Properties
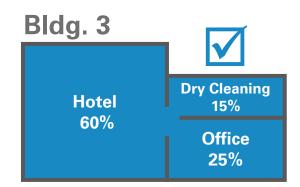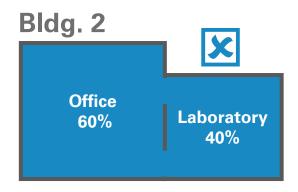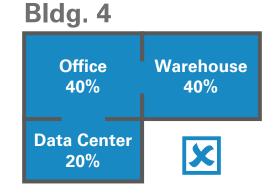
Eligible for Score ☑   Ineligible for Score ☒

Bldg. 1 ☑

Office 60%   Warehouse 40%

Bldg. 2 ☒

Office 60%   Laboratory 40%

Bldg. 3 ☑

Hotel 60%   Dry Cleaning 15%   Office 25%

Bldg. 4

Office 40%   Warehouse 40%   Data Center 20% ☒

ENERGY STAR

ENERGY STAR Portfolio Manager - Canada

- The tool has been adapted to include Canadian weather data, postal codes, both official languages, the metric system and other data specific to Canada.

- Scores are based on a model developed by Natural Resources Canada using data from Canadian buildings.

Please direct all questions about Canadian properties to [Natural Resources Canada](#)

Property types include:

– Distribution Center

– Financial Office

– Hotels/Motels

– K-12 School

– Hospitals

– Ice Rinks/Curling Rinks

– Medical Office

– Non-Refrigerated Warehouse

– Office

– Residential Care Facility

– Self-Storage Facility

– Senior Care Community

– Supermarket/Grocery Store

– Multifamily Housing

Pop Quiz!

1. Portfolio Manager can be used to benchmark building performance for which resource types?
   a. Energy
   b. Water
   c. Waste
   d. All of the above

2. True or False: If your building is not eligible for the 1-100 ENERGY STAR score, you cannot benchmark in Portfolio Manager.
   a. True
   b. False

Pop Quiz!

1. Portfolio Manager can be used to benchmark building performance for which resource types?
   a. Energy
   b. Water
   c. Waste
   d. All of the above

   > You can benchmark any combination of these three resources in Portfolio Manager!

2. True or False: If your building is not eligible for the 1-100 ENERGY STAR score, you cannot benchmark in Portfolio Manager.
   a. True
   b. False

   > For property types not eligible for the ENERGY STAR score, there are a variety of other metrics that you can use to track performance, including:
   > - Site and Source Energy Use Intensity
   > - Weather Normalized Energy Use
   > - Greenhouse Gas Emissions
   > - And dozens more!

To get started in Portfolio Manager you will need:

1 Property information:

- Primary function
- Name, address, postal code
- Year built
- Gross floor area

2 Property use details, e.g.:

- Operating hours
- No. of computers
- No. of workers, etc.

3 At least 12 mos. of consumption data for resources you want to track:

- Property-specific utility bills for all purchased and on-site generated energy and water
- Quantity of waste and materials recycled, disposed, donated etc.

Use Portfolio Manager's **data collection worksheet** to gather data upfront for your property type/s

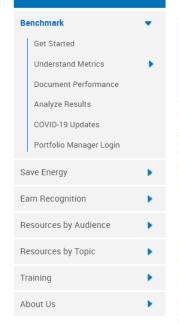https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet

How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Generate reports to assess progress

Energystar.gov/portfoliomanager

Create a username and
password, then log in

Navigate Portfolio Manager

4 portfolio level tabs

| MyPortfolio | Sharing | Reporting | Recognition |

7 property level tabs

| Summary | Details | Energy | Water | Waste & Materials | Goals | Design |

Intuitive navigation – multiple ways to get to the same place

Navigate Portfolio Manager

Portfolio level view

Navigate Portfolio Manager

Property level view ➡

How To

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Add a Property

Add a Property: Existing

Select property type

Select number of buildings

Select construction status

Entering Basic Property Information

Set Up a Property: Basic Property Information

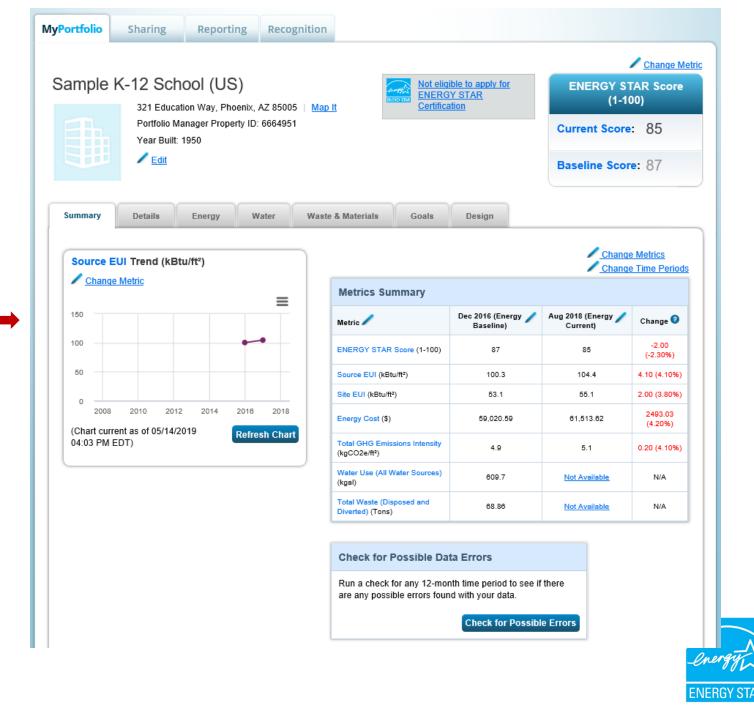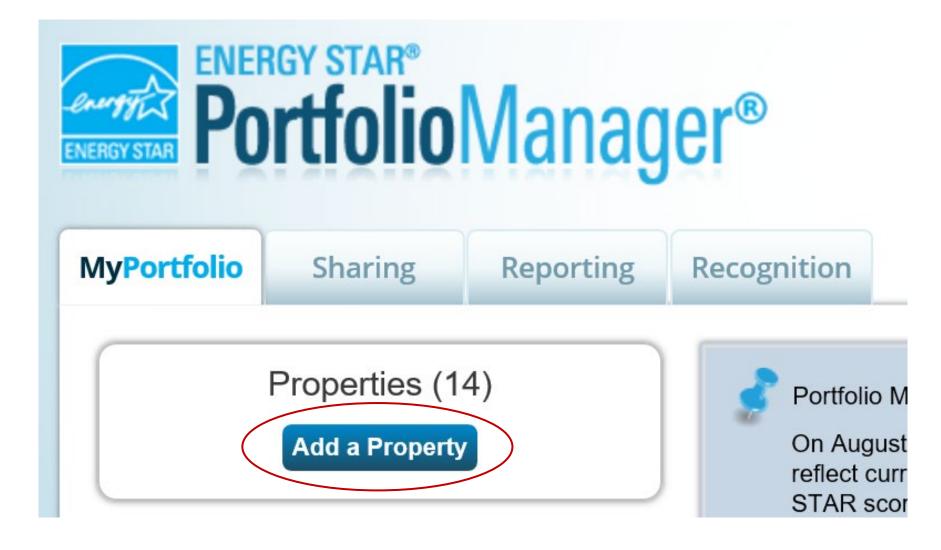Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name:	*
Country:	* - - - Select - - -
Street Address:	*
City/Municipality:	*
State/Province:	* - - - Select - - -
Postal Code:	*
Year Built:	*
Gross Floor Area:	* Sq. Ft. ☐ Temporary Value

Gross Floor Area (GFA) is the total property floor area, measured from the principal exterior surfaces of the building(s). **Do not include parking.** Details on what to include.

Irrigated Area:	Sq. Ft.
Occupancy:	* Select %

Check the statements that apply

Do any of these apply?

- ☐ My property's energy consumption includes parking areas
- ☐ My property has a Data Center that requires a constant power load of 75 kW or more
- ☐ My property has one or more retail stores
- ☐ My property has one or more restaurants/cafeterias

Answering these simple questions will help us guide you in entering your property correctly.

● ● ● ● ● ● ● ● ● ● ● ● ● ●

Back

Continue   Cancel

These use details will change depending on the property type you specify.

Enter Values for Property Use Details

Building Use   Edit Name

Supermarket/Grocery Store refers to buildings used for the retail sale of primarily food and beverage products, and which may include small amounts of preparation and sale of ready-to-eat food. Buildings where the primary business is the onsite preparation and sale of ready-to-eat food should use one of the Restaurant property types.

Gross Floor Area should include all space within the building(s), including the sales floor, offices, storage areas, kitchens, staff break rooms, and stairwells.

Property Use Detail	Value		Current As Of	Temporary Value
★ Gross Floor Area	* 100,000	Sq. Ft. ∨	1/1/1990	☐
★ Weekly Operating Hours		☐ Use a default	1/1/	
★ Number of Workers on Main Shift		☐ Use a default	1/1/	
Number of Cash Registers		☐ Use a default	1/1/	
Number of Computers		☐ Use a default	1/1/	
★ Number of Open or Closed Refrigeration/Freezer Units		☐ Use a default	1/1/	
Length of All Open or Closed Refrigeration/Freezer Units		Ft. ∨ ☐ Use a default	1/1/	
★ Number of Walk-in Refrigeration/Freezer Units		☐ Use a default	1/1/	
Area of All Walk-in Refrigeration/Freezer Units		Sq. Ft. ∨	1/1/	
Cooking Facilities	∨ ☐ Use a default		1/1/	
★ Percent That Can Be Heated	∨ ☐ Use a default		1/1/	
★ Percent That Can Be Cooled	∨ ☐ Use a default		1/1/1990	☐

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

Add Another Type of Use ∨   Add

Property Summary Tab

Property Summary Tab: Customized Metric Displays

Add and Set Up a Property: More than One Building (Campus)

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!

ACME BANK

Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type ▼

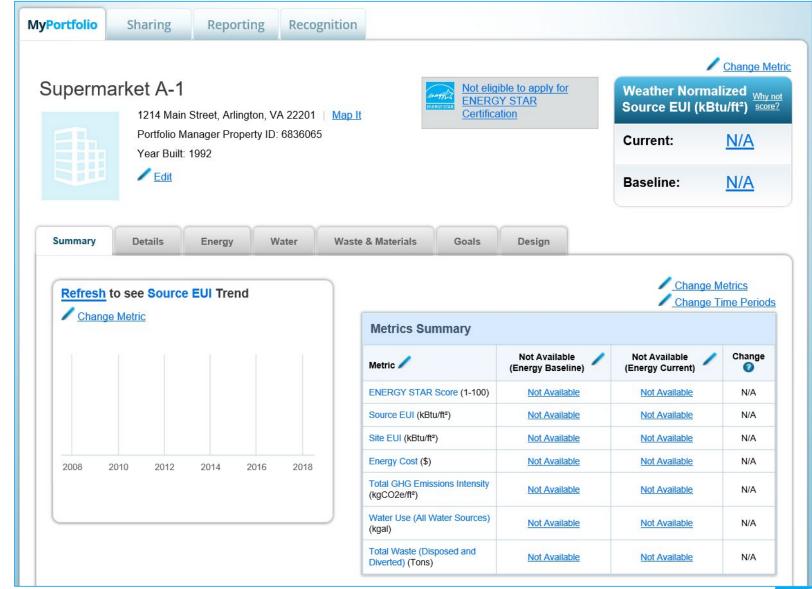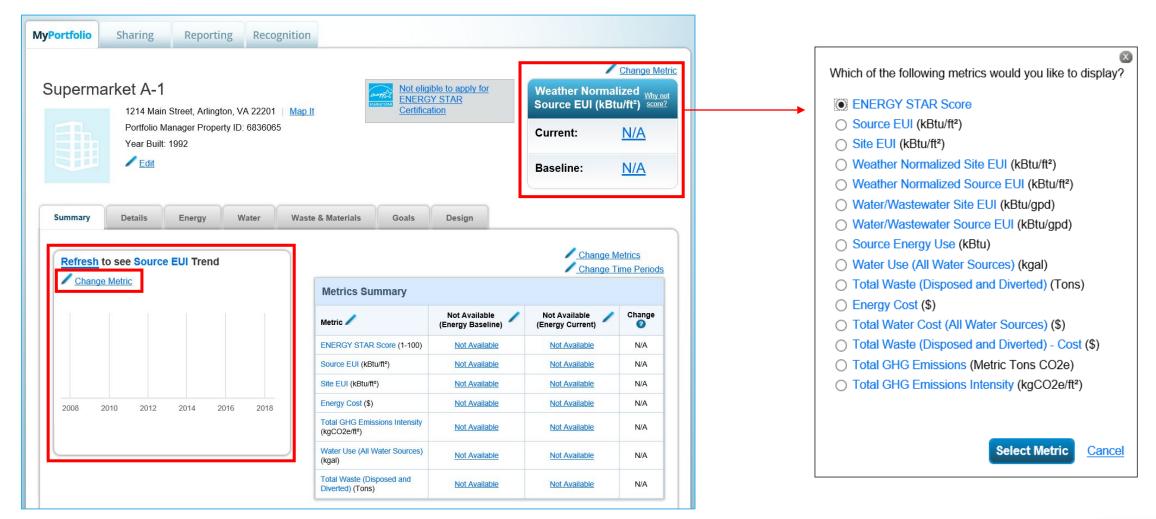Learn more about Property Types.

Your Property's Buildings

How many physical buildings do you consider part of your property?

- ○ **None**: My property is part of a building
- ○ **One**: My property is a single building
- ○ **More than One**: My property includes multiple buildings (Campus Guidance)

How many?

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.

Get Started! Cancel

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.
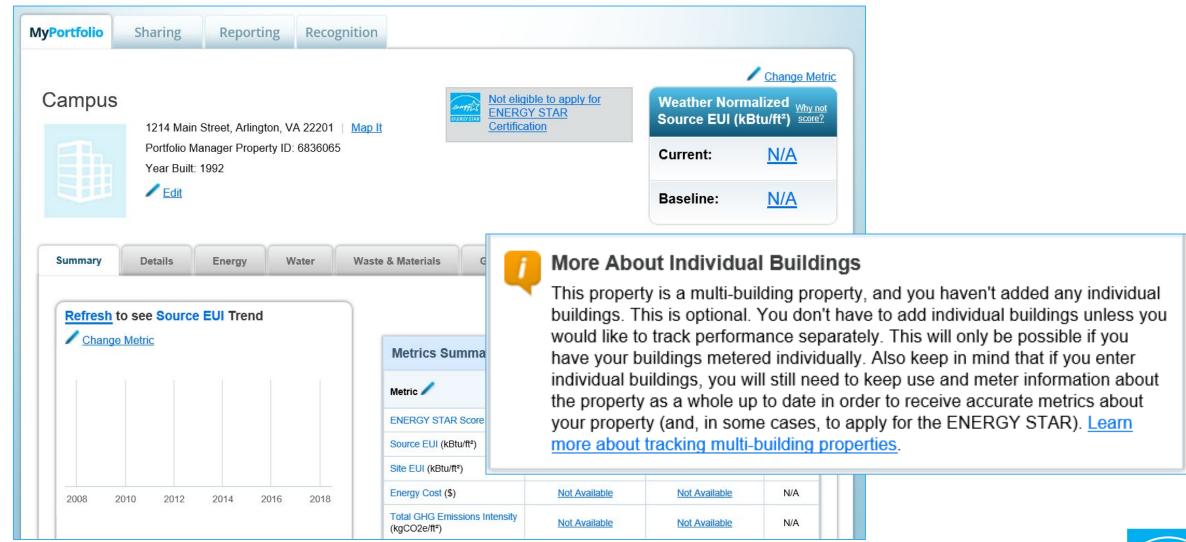
Test Properties

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 what your needs are. This can be configured on your Account Settings.

ENERGY STAR® PortfolioManager™

MyPortfolio Sharing Planning Reporting Recognitio

Properties (5)

Add a Property

Notifications (0)

You have no new notifications.

Source EUI Trend

1,000

500

My Properties (5)

Filter by: View All Properties

Create Group | Man
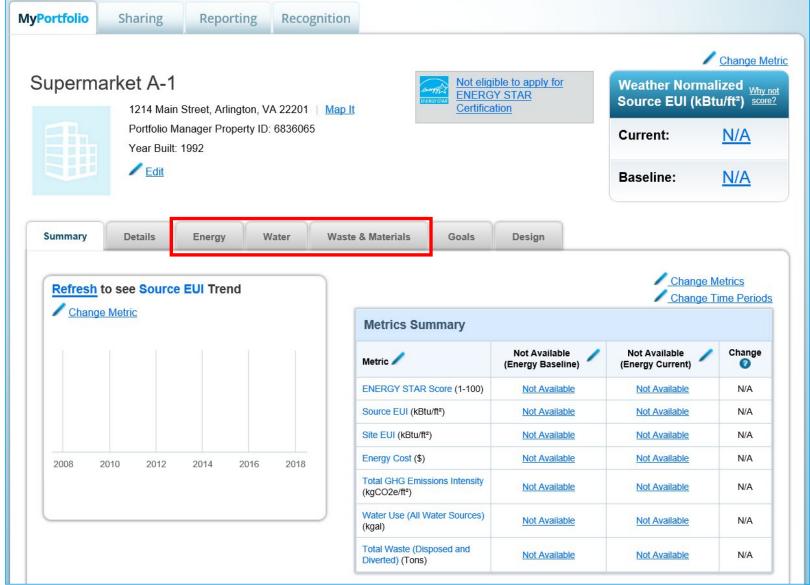
Name ▲

Federal Building

Campus Configurations

How To

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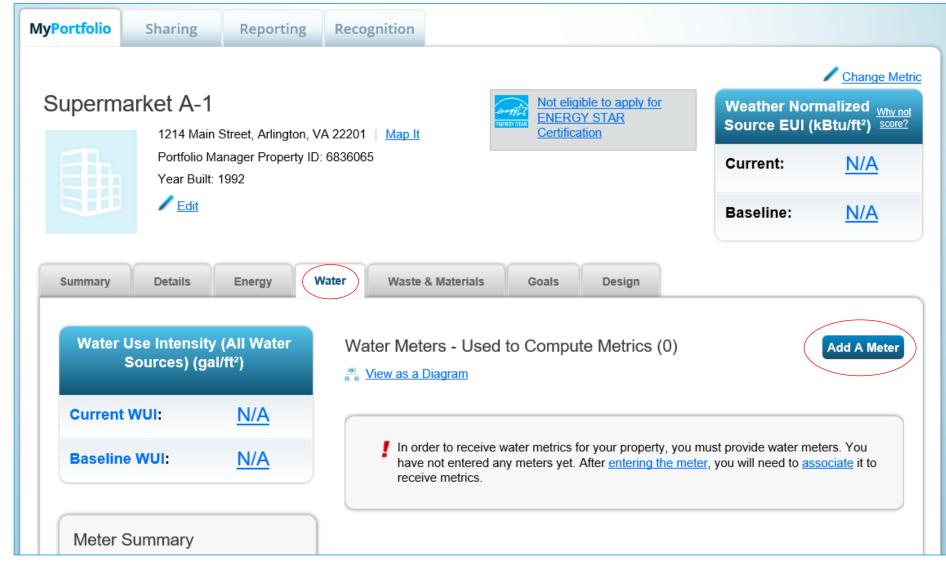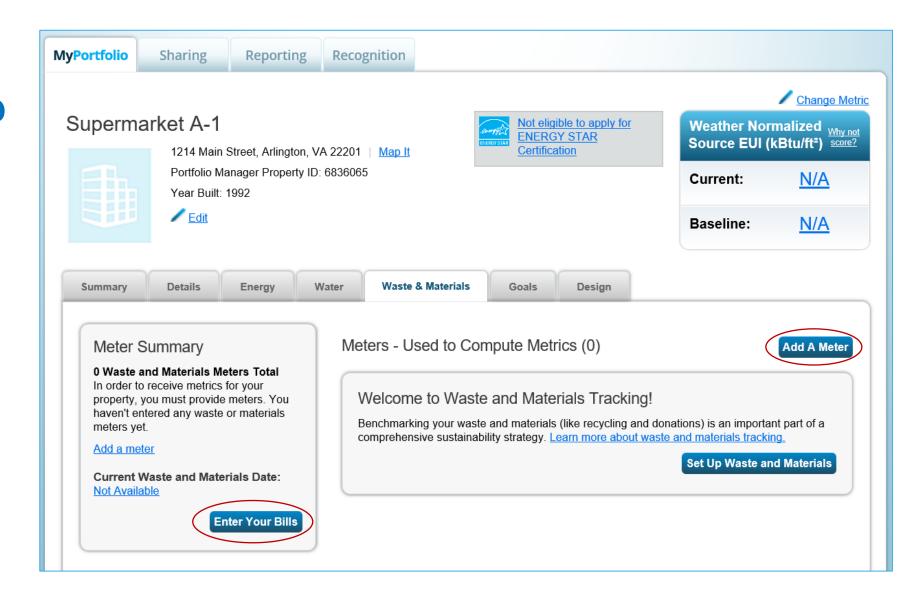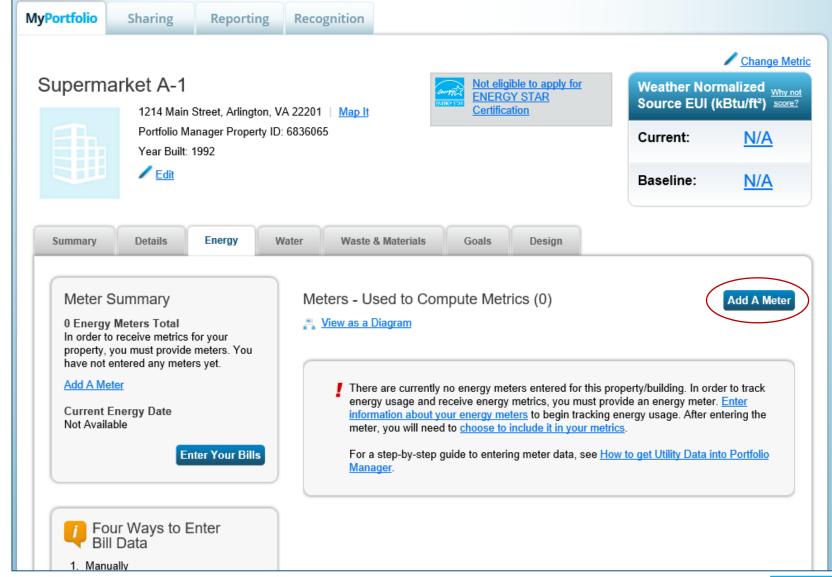- Generate reports to assess progress

Meters Tabs

Water Tab

Waste and Materials Tab

Energy Tab

Entering Additional Information

Get Started Setting Up Meters for Supermarket A-1

There are four ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. And finally, you can hire an organization that exchanges data to update your energy data automatically.

Sources of Your Property's Energy

What kind of energy do you want to track? Please select all that apply.

- [ ] Electric
- [ ] Natural Gas
- [ ] Propane
- [ ] Fuel Oil (No. 2)
- [ ] Diesel
- [ ] District Steam
- [ ] District Hot Water
- [ ] District Chilled Water
- [ ] Fuel Oil (No. 4)
- [ ] Fuel Oil (No. 5 and No. 6)
- [ ] Coal (anthracite)
- [ ] Coal (bituminous)
- [ ] Coke
- [ ] Wood
- [ ] Kerosene
- [ ] Fuel Oil (No. 1)
- [ ] Other:

Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter.
Learn More.

Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings.
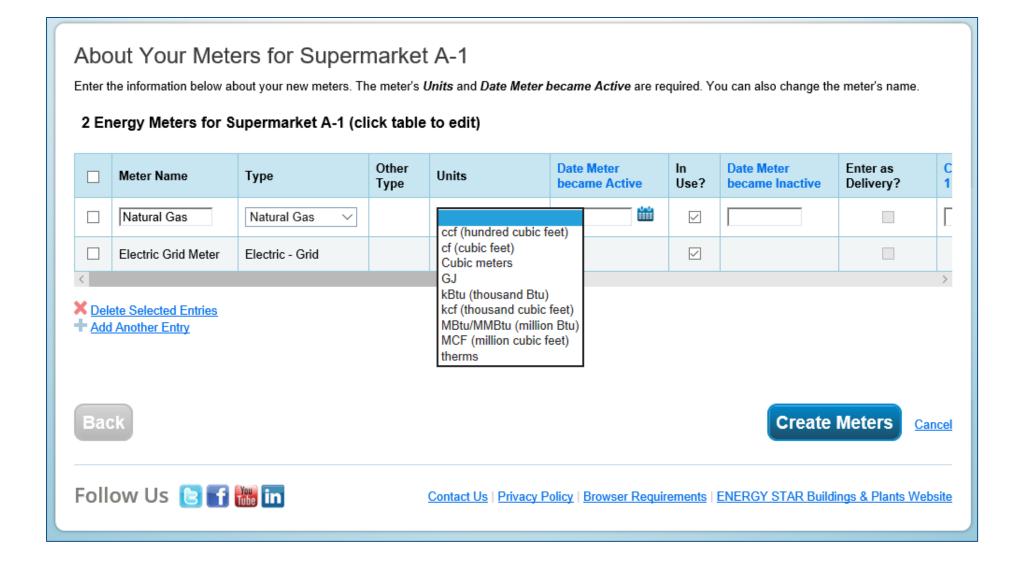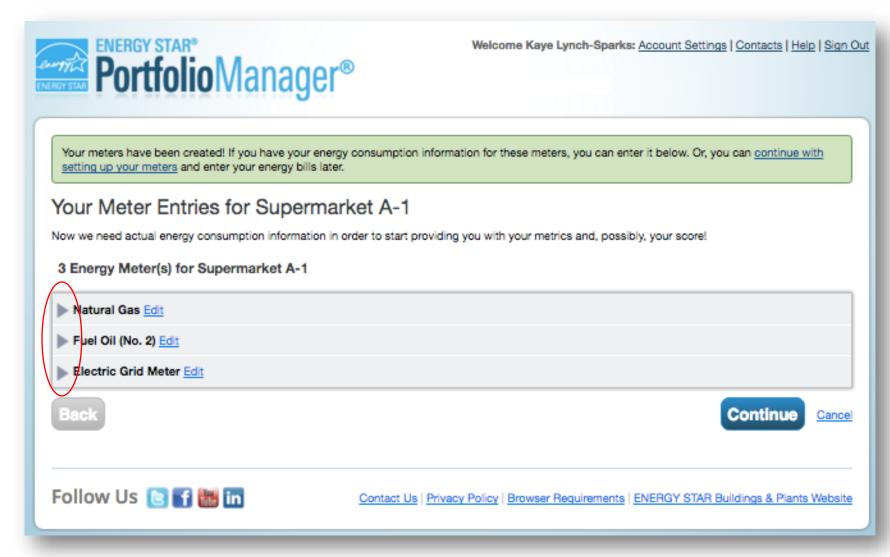Learn more.

Get Started!   Cancel
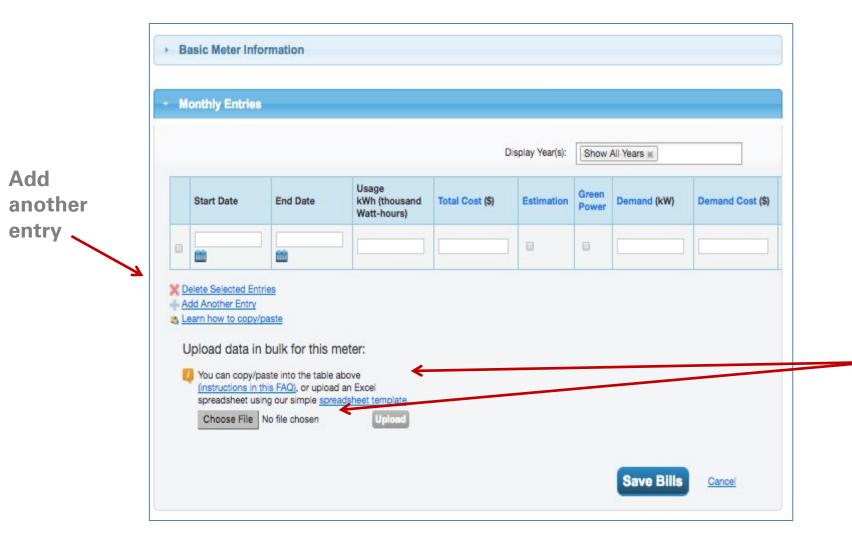
About Your Meters

Add Energy Consumption Information

Expand meter by clicking arrow

Add Meter Entries and Fill in Data

Add another entry

Use a spreadsheet to upload or copy and paste

How To Guide: Electric Demand Tracking
https://www.energystar.gov/buildings/tools-and-resources/how_track_electric_demand_portfolio_manager.

Meters to Add to Total Consumption

Energy Meters Tab: Meters Added and Displayed

Notification

Add or update bills

View Meter Data and Manage Bills for Your Property

Get Data Into Portfolio Manager
Choose the best data management method.

Manual entry

Spreadsheet upload

Web services

Get Data In: Manually

Get Data In: Spreadsheet Upload

Get Data In: ENERGY STAR Web Services

- Some energy service companies and utilities exchange data with Portfolio Manager to:
  - Manage building and utility data for customers
  - Access the ENERGY STAR score and other performance metrics

- To use web services, "**connect**" and "**share**" your properties with your web service provider from the Sharing tab

Get Data In: ENERGY STAR Web Services

View ENERGY STAR Notifications

Search Notifications

2018

▶ Rocky Mountain Power, may be able to send energy data to your building records.		04/26/2018
▶ Xcel Energy, may be able to send energy data to your building records.		04/26/2018
▶ Commonwealth Edison, may be able to send energy data to your building records.		04/26/2018
▶ Los Angeles Department of Water & Power, may be able to send energy data to your building records.		04/26/2018
▶ Southern California Edison, may be able to send energy data to your building records.		04/26/2018
▶ Salt River Project, may be able to send energy data to your building records.		04/26/2018
▶ Pepco, may be able to send energy data to your building records.		04/26/2018
▶ Baltimore Gas & Electric, may be able to send energy data to your building records.		04/26/2018

Users will have an ENERGY STAR Notification when web services are available for a property

Get Data In: ENERGY STAR Web Services

Expand the notification for more information or to connect with the utility; connecting is the first step for using web services.

Pop Quiz!

3. How many ways are there to get data into Portfolio Manager?
   a. One
   b. Two
   c. Three
   d. Four or more

Pop Quiz!

3. How many ways are there to get data into Portfolio Manager?

    a. One

    b. Two

    c. Three

    d. Four or more

For property types not eligible for the ENERGY STAR score, there are a variety of other metrics that you can use to track performance, including:
- Site and Source Energy Use Intensity
- Weather Normalized Energy Use
- Greenhouse Gas Emissions
- And dozens more!

How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Generate reports to assess progress

Reporting Tab

Choose from pre-set chart & graph options

Download performance documents

Create and generate templates & reports

Performance Documents

ENERGY STAR
Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
- ENERGY STAR Scorecard
- Water Scorecard

Charts and Graphs

- Source EUI
- Site EUI
- ENERGY STAR score
- Weather normalized source EUI
- Weather normalized site EUI
- Total GHG emissions intensity
- Energy cost intensity
- Indoor water intensity
- Indoor water cost intensity
- Building emissions report

Scroll through to see available Charts & Graphs.

MyPortfolio | Sharing | **Reporting** | Recognition

Charts & Graphs

0   25   50   75   100

ENERGY STAR score

What are the average ENERGY STAR scores of my properties?

Charts and Graphs

Print or download figures for use externally

View the next chart

Scroll to bottom to view and export raw data

Charts and Graphs

Charts & Graphs

Weather Normalized Source EUI

How much total primary fuel would be required by my properties, under average weather conditions?

ENERGY STAR Performance Documents

- Statement of Energy Performance (SEP)
- Statement of Energy Design Intent (SEDI)
- Data Verification Checklist
- Progress & Goals Report
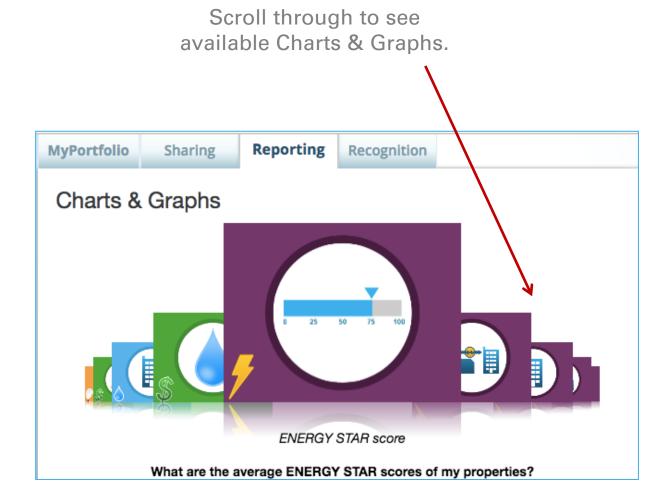- ENERGY STAR Scorecard
- Water Scorecard

MyPortfolio | Sharing | **Reporting** | Recognition | Admin | Processing

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| Data Requests from Others | My Reports and Templates | **ENERGY STAR Reports** |

Create a New Template

Create and generate templates & reports

⬍	Name ⬍	Status ⬆	Action
	Performance Highlights	**Last Modified:** 6/16/2022 12:25 PM	I want to...
	ENERGY STAR Certification Status	**Last Modified:** 6/16/2022 11:35 AM	I want to...
	Building Emissions Calculator Import	**Last Modified:** 6/16/2022 10:14 AM	I want to...
	Waste Performance	**Last Modified:** 6/16/2022 10:11 AM	I want to...

Standard Reports

- Performance Highlights

- Energy Performance

- Emissions Performance

- Water Performance

- Fuel Performance

- Waste Performance

- ENERGY STAR Certification Status

- Partner of the Year Report

- Sustainable Buildings Checklist Report

Pop Quiz!

4. True or False: Portfolio Manager users must define a custom template if they want to use the Reporting functionality.
   A. True
   B. False

ENERGY STAR

Pop Quiz!

4. True or False: Portfolio Manager users must define a custom template if they want to use the Reporting functionality.

   A. True

   B. False

Portfolio Manager offers a variety of standard, pre-defined Reporting features, such as ENERGY STAR Performance Documents, charts and graphs, and standard progress report templates on energy and greenhouse gas usage.

Recap

We learned how to:

- Navigate Portfolio Manager

- Add a property and enter its use details

- Enter energy, water, and waste & materials data

- Analyze progress using performance documents, charts and graphs, and reports

Extra Help

- **Visit www.energystar.gov/buildingshelp**
  - Extensive list of FAQs
  - Online form to submit technical questions or comments
- **Additional Portfolio Manager training resources available at: www.energystar.gov/buildings/training**
  - Step-by-step documents (PDF)
  - Access to recorded trainings and short videos
  - Information on upcoming trainings
- **Ask the Expert**
  - Wednesdays at 12:00 noon ET. It's an open Q&A session for Portfolio Manager questions.
  - https://energystar-mesa.force.com/PortfolioManager/s/article/When-are-the-Ask-The-Expert-webinars-1600088554111
- **Register for regular webinars at: http://esbuildings.webex.com**
- **Portfolio Manager Technical Reference Series: https://www.energystar.gov/buildings/tools-and-resources?f0=im_field_select_primary_category:1522**

Thank you for attending!

Questions?

Slides will be sent to all webinar registrants after today's session

If you have any questions on Portfolio Manager
or the ENERGY STAR program, contact us at:
www.energystar.gov/BuildingsHelp