

## 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!

### 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.

## Navigate with Ease

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

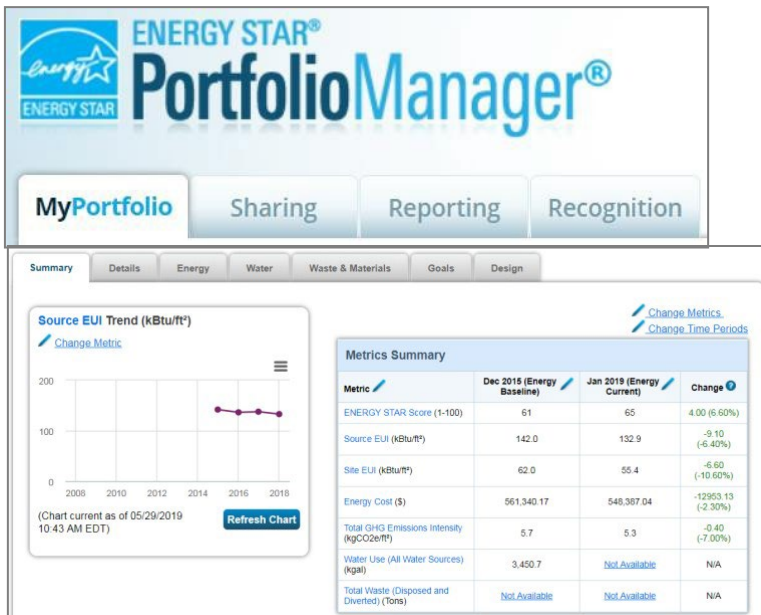


Figure 1: MyPortfolio landing page

### Accuracy Checks

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

# 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.

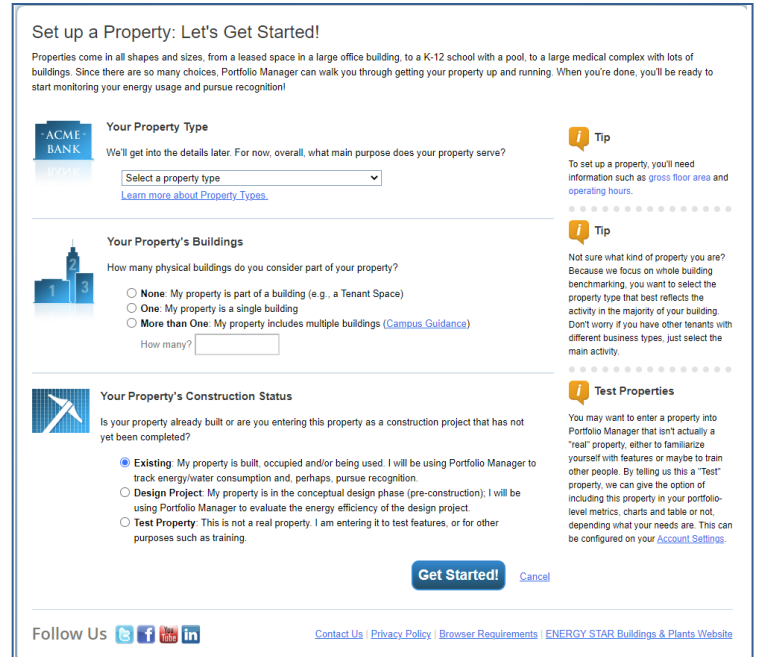


Figure 2: Setting up a Property screenshot

# 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.

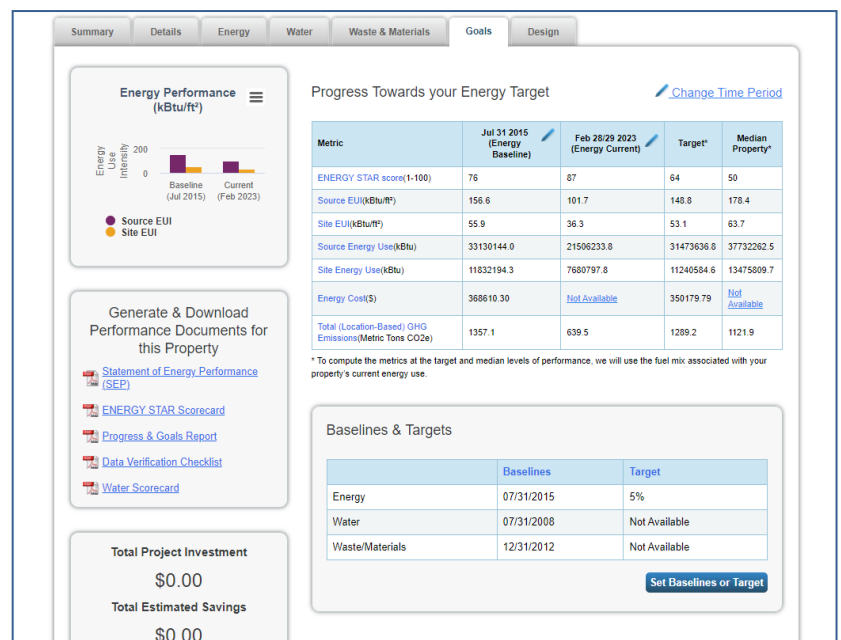


Figure 3: View of the Goals tab within a specific property

# 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.
- ✓ 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](#).



Figure 4: Visual display of design reports

## 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](#).

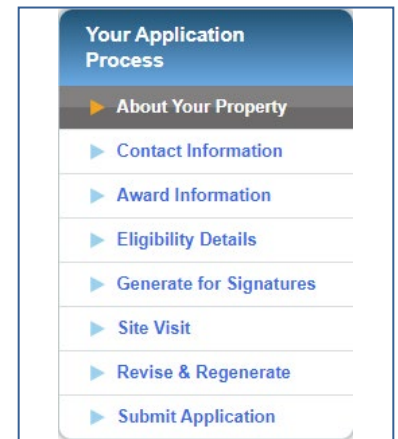


Figure 5: Tracking your ENERGY STAR application

### Learn More!

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