

## Portfolio Manager® Quick Start Guide

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. 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/portfoliomanager](http://www.energystar.gov/portfoliomanager). 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 (GFA), 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, multifamily, 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 Property 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, do not break it out as a separate Property Use Type. Simply include it’s square footage with the building’s primary use.

## 2 Enter Energy, Water, and Waste & Materials Data

To receive the most accurate picture of your building's performance, tell Portfolio Manager how much energy and water your building consumes, and the volume of waste and materials that you generate. Follow these steps to enter energy, water, and waste data for your property.

**Get Started Setting Up Waste/Materials Meters for Transformation Fitness**

Most likely you don't have physical "meters" measuring your waste or materials, but you can set up a "meter" to easily track this information in Portfolio Manager. You should create one meter for every type of waste or material you are tracking (e.g. disposed trash, recycled cardboard, etc.) [Learn more about waste and material tracking.](#)

**About Your Waste/Material**

What waste/material are you tracking?

What are you doing with it?

[+ Add another Type of Waste/Material](#)

**Continue** [Cancel](#)

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1. Click on your property from the **MyPortfolio** tab, then select either the **Energy, Water, or Waste & Materials** tab.
2. Click **Add A Meter**.
3. If you create an energy or water meter:
  - i. Select the type of energy or water used and the number of meters to create, and click **Get Started!**
  - ii. Click on a meter to enter units and first bill date. If this meter reflects a bulk fuel purchase for an energy meter, select the **Enter as Delivery?** checkbox.
  - iii. Click the blue 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. You may also choose to record cost here, too. Once you're finished adding entries, click **Continue**.
  - iv. Select the boxes of the meters that total your property's energy or water use on the **Select Meters to Include in Metrics** page. Click **Apply Selections**.
4. If you create a waste meter:
  - i. Select the waste you are tracking and indicate what you do with it. Click **Continue**.
  - ii. Indicate how often the material is being collected (regular or intermittent), the units used for tracking, and if prompted, the date you first started tracking. Click **Create Meter(s)**.
  - iii. Click the blue 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. You may also choose to record cost and disposal destination here, too. Once you're finished adding entries, click **Continue**.
  - iv. Select the boxes of the meters that total your property's waste and materials on the **Select Meters to Include in Metrics** 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/portfoliomanager](http://www.energystar.gov/portfoliomanager).  
To get answers to your questions, visit [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp).