

Portfolio Manager[®] 101



ENERGY STAR[®]

Portfolio Manager[®]

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

Management Tool

- Compare, measure and track over time
- Set baselines, goals and targets
- Identify under performers
- Track the impact of management strategies
- Create custom reports and charts
- Share data with others
- Apply for ENERGY STAR certification
- Save energy and water + reduce waste = avoid \$

Metrics Calculator

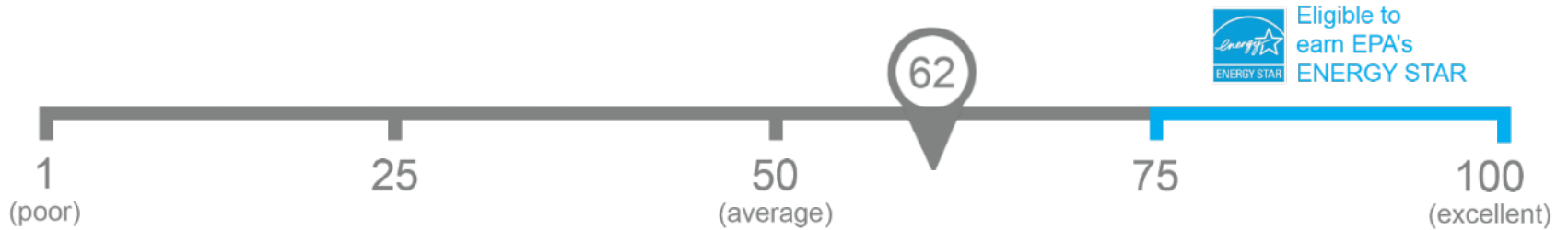
- More than 300 metrics for all bldg. types
- Energy (source, site, weather normalized etc.)
- ENERGY STAR 1-to-100 score (for many building types)
- Greenhouse gas emissions (indirect, direct, total, avoided)
- Green power
- Water (indoor, outdoor by type)
- Waste & materials (trash, recycling, compost etc.)

Free, online secure platform: www.energystar.gov/portfoliomanager

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:	✓	✓	✓
<ul style="list-style-type: none"> • Compare current use to baseline overtime. 	✓	✓	✓
<ul style="list-style-type: none"> • Compare median of national sample of similar buildings to baseline. 	✓		
<ul style="list-style-type: none"> • 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)		

The 1-100 ENERGY STAR Score



One simple number
understood by ALL stakeholders.

Property types with 1-100 ENERGY STAR scores

*Not eligible for ENERGY STAR Certification



Bank Branch



Barracks*



Courthouses



Data Centers



Distribution Centers



Financial Offices



Hospitals



Hotels



K-12 Schools



Office Buildings



Medical Offices*



Multifamily Housing



Residence Hall/Dormitory*



Retail Stores



Senior Care Communities



Supermarkets



Warehouses



Wastewater Treatment Plants*



Wholesale club/
Supercenters



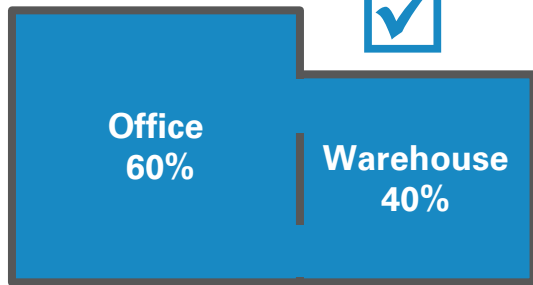
Worship Facilities

ENERGY STAR Score for Multi-Use Properties

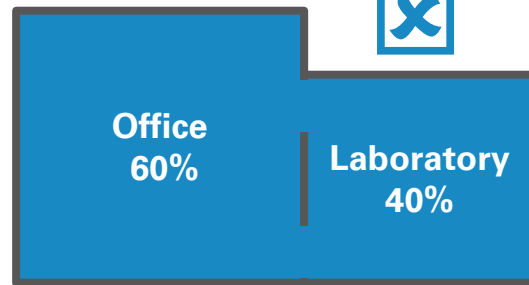
Eligible for Score 

Ineligible for Score 

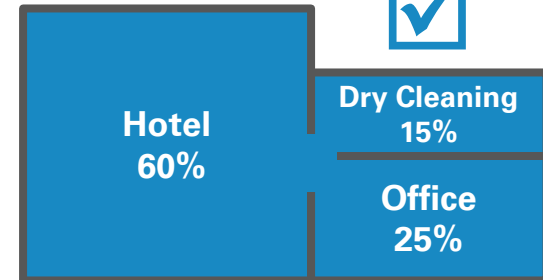
Bldg. 1



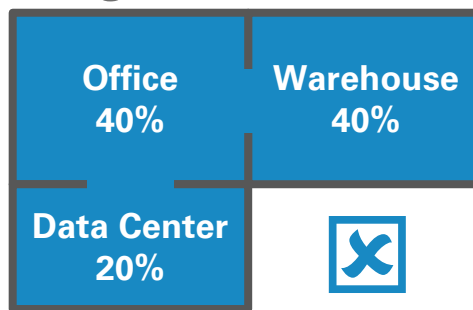
Bldg. 2



Bldg. 3



Bldg. 4



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
 - 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

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 other time, 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 resource/s 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

Log in

Navigate Portfolio Manager

4 portfolio level tabs



7 property level tabs




Intuitive navigation – multiple ways to get to the same place

Navigate Portfolio Manager

Portfolio level view





Welcome ninaberlin: [Account Settings](#) | [Notifications](#) | [ENERGY STAR Notifications](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

MyPortfolio

Sharing

Reporting

Recognition

Properties (14)

Add a Property

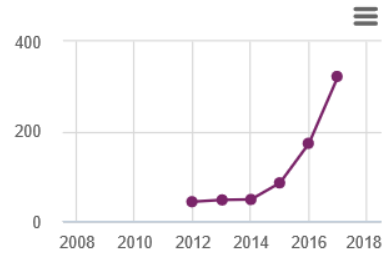
Portfolio Manager Metric Updates

On August 27, 2018 performance metrics in Portfolio Manager were updated for U.S. buildings to reflect current market data. You may notice a change in your current and historic 1-100 ENERGY STAR score or other metrics. After logging in for the first time after these updates have been made, you'll need to click the "Refresh Metrics" button to see your new metrics within the Dashboard. For more information, visit www.energystar.gov/scoreupdates.

Clear Message

ENERGY STAR Score Trend

Change Metric



(Chart current as of 05/08/2019 04:27 PM EDT) Refresh Chart

Manage Portfolio

[Transfer ownership](#) of a property that you manage to another Portfolio Manager user.

Dashboard (Metrics current as of 03/11/2019 12:05 PM EDT) Search by ID or Name

View All Properties (14) ▼
Energy Highlights ▼
Refresh Metrics

[Add/Edit/Delete Groups](#)
[Add/Edit/Delete Views](#)

Name ▼	Energy Current Date ↕	ENERGY STAR Score ↕	Site EUI (kBtu/ft ²) ↕	Source EUI (kBtu/ft ²) ↕
Antonio Office Building 6652215	NA	NA	NA	NA
Company HQ 6466285	04/30/2018	63	62.5	150.2
Corporate Office 6650503	10/31/2018	64	55.8	154.0
Hotel & Suites 6652206	08/31/2018	25	79.4	222.4
Little Falls Elementary School 6466039	04/30/2018	61	62.0	109.7




Navigate Portfolio Manager

Property level view


MyPortfolio
Sharing
Reporting
Recognition

Sample K-12 School (US)



321 Education Way, Phoenix, AZ 85005 | [Map It](#)

Portfolio Manager Property ID: 6664951

Year Built: 1950

[Edit](#)

[Change Metric](#)

ENERGY STAR Score (1-100)

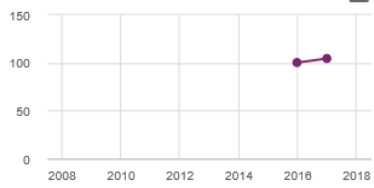
Current Score: 85

Baseline Score: 87

Summary
Details
Energy
Water
Waste & Materials
Goals
Design

Source EUI Trend (kBtu/ft²)

[Change Metric](#)



(Chart current as of 05/14/2019 04:03 PM EDT)

[Refresh Chart](#)

Metrics Summary

[Change Metrics](#)
[Change Time Periods](#)


Metric	Dec 2016 (Energy Baseline)	Aug 2018 (Energy Current)	Change
ENERGY STAR Score (1-100)	87	85	-2.00 (-2.30%)
Source EUI (kBtu/ft ²)	100.3	104.4	4.10 (4.10%)
Site EUI (kBtu/ft ²)	53.1	55.1	2.00 (3.80%)
Energy Cost (\$)	59,020.59	61,513.82	2493.03 (4.20%)
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	4.9	5.1	0.20 (4.10%)
Water Use (All Water Sources) (kgal)	609.7	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	68.86	Not Available	N/A

Check for Possible Data Errors

Run a check for any 12-month time period to see if there are any possible errors found with your data.

[Check for Possible Errors](#)

ENERGY STAR. The simple choice for energy efficiency.



17

How To

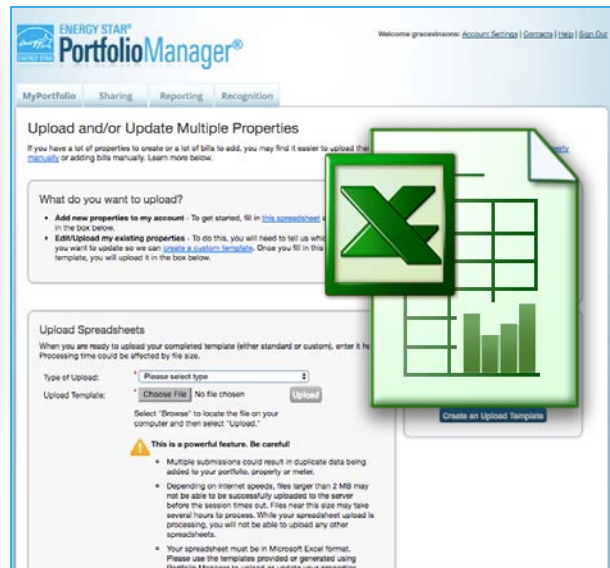
- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy, water, and waste & materials data
- Generate reports to assess progress

Get Data Into Portfolio Manager

Manual entry



Spreadsheet upload



Web services



Choose the best data management method.

Get Data In: Manually

The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top left is the ENERGY STAR logo. To its right, the text "ENERGY STAR®" is displayed in blue, followed by "PortfolioManager®" in a larger, bold blue font. Below this, there is a navigation bar with four buttons: "MyPortfolio" (highlighted in white), "Sharing", "Reporting", and "Recognition".

Below the navigation bar, there is a large white rounded rectangle containing the text "Properties (14)" and a blue button labeled "Add a Property". This button is circled in red. To the right of this rectangle is a grey rounded rectangle containing a blue pushpin icon and the text "Portfolio M" and "On August reflect curr STAR scor".

Get Data In: Spreadsheet Upload



MyPortfolio

Sharing

Reporting

Recognition

Manage Portfolio

[Transfer ownership](#) of a property that you manage to another Portfolio Manager user.

[Upload and/or update multiple properties](#) at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.

[Download your entire portfolio to Excel](#) or create a [custom download](#).

[Set a portfolio baseline and/or target](#) to help measure progress.

[Add sample properties](#) to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.



MyPortfolio | Sharing | Reporting | Recognition

Upload and/or Update Multiple Properties

If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload them using a spreadsheet rather than [entering each property manually](#) or adding bills manually. Learn more below.

What do you want to upload?

- **Add new properties to my account** - To get started, fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties you want to update so we can [create a custom template](#). Once you fill in this custom template, you will upload it in the box below.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template:

Select "Browse" to locate the file on your computer and then select "Upload."

⚠ This is a powerful feature. Be careful!

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

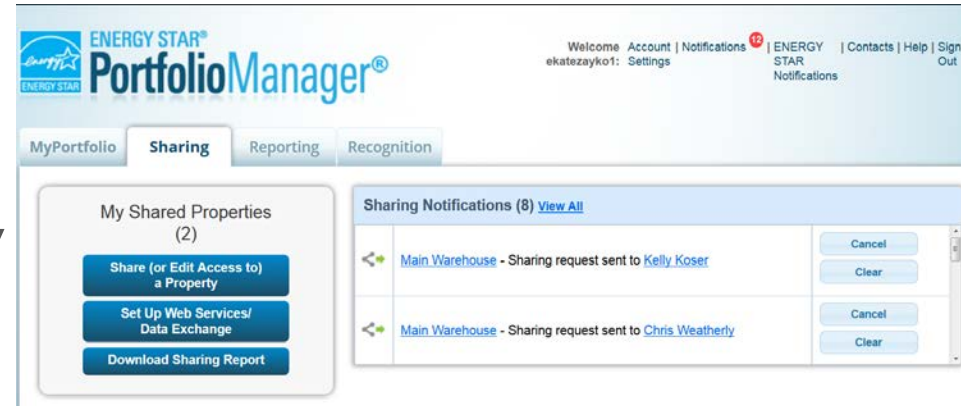
Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

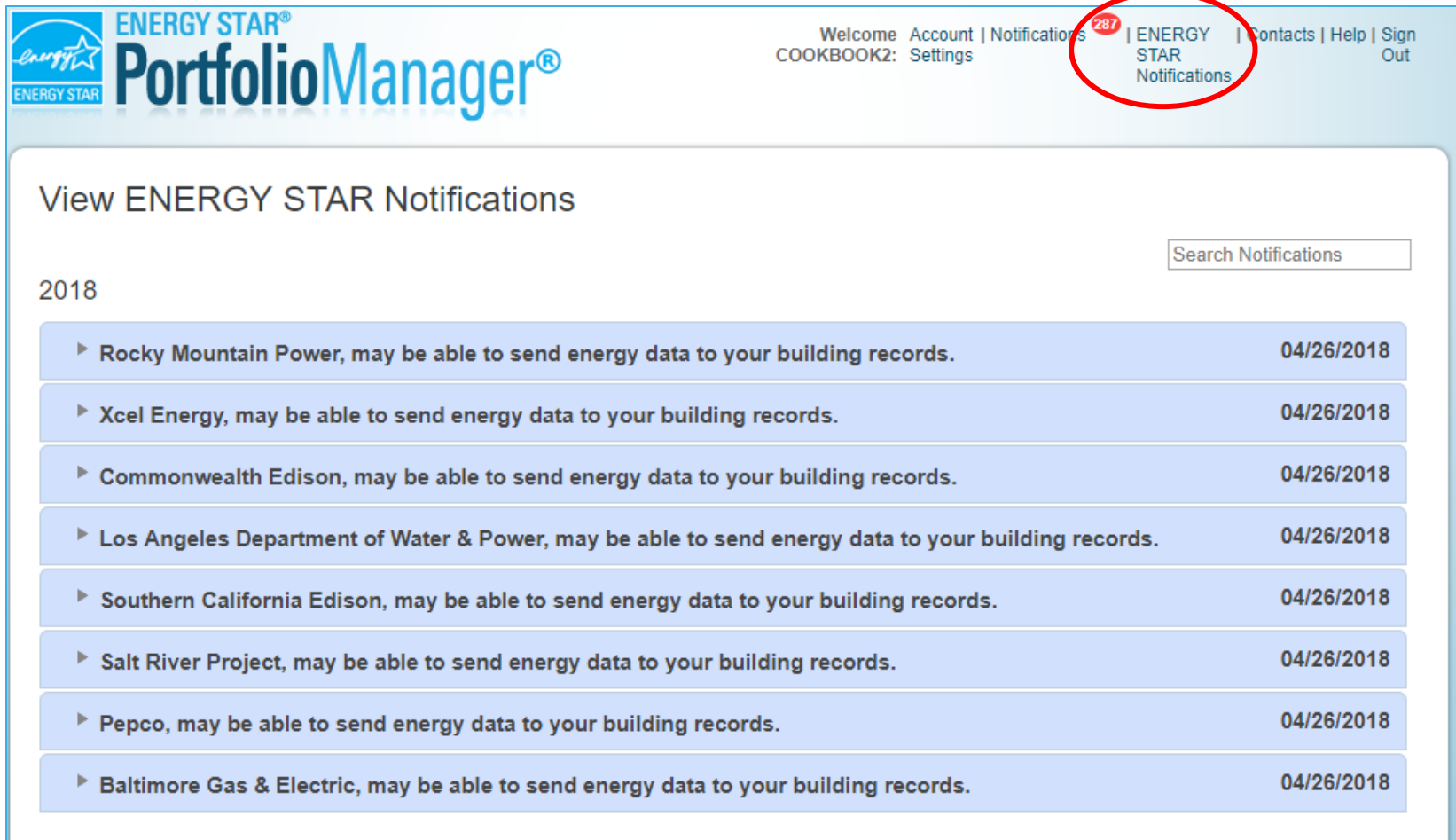
[Create an Upload Template](#)

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



The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top left is the ENERGY STAR logo and the text "ENERGY STAR® PortfolioManager®". At the top right, there is a navigation menu with links for "Welcome", "Account", "Notifications", "ENERGY STAR Notifications", "Settings", "COOKBOOK2:", "Contacts", "Help", and "Sign Out". A red circle highlights the "ENERGY STAR Notifications" link, which has a red badge with the number "287". Below the navigation is a section titled "View ENERGY STAR Notifications" with a search box labeled "Search Notifications". The main content area displays a list of notifications for the year 2018, each with a right-pointing arrow icon, a message, and a date of 04/26/2018.

Notification Message	Date
▶ 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

The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top left is the ENERGY STAR logo and the text "ENERGY STAR® PortfolioManager®". At the top right, there are navigation links: "Welcome COOKBOOK2:", "Account Settings", "Notifications 287", "ENERGY STAR Notifications", "Contacts", "Help", and "Sign Out". The main heading is "View ENERGY STAR Notifications". Below this is a search box labeled "Search Notifications". The year "2018" is displayed. A notification card for "Rocky Mountain Power, may be able to send energy data to your building records." is dated "04/26/2018". The notification text states: "Your utility, Rocky Mountain Power, may be able to send energy data directly to some of your building records, using Portfolio Manager web services. Rocky Mountain Power is listed as the utility for the following 9 properties within your Portfolio Manager account: Administration Building, Office Case 1 - BL, Evaluation Campus(v1), see more, Click here for additional information and to see if this option is right for you. If this what you would like to do, you can connect with Rocky Mountain Power to get the process started." The "Click here" and "connect" links are circled in red. Below this notification are two other notifications for "Xcel Energy" and "Commonwealth Edison", both dated "04/26/2018".

- 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

You can get data into Portfolio Manager three ways:

1. Manually (create/update one property or meter at a time)
2. Using spreadsheet templates
3. By working with third-party providers that exchange data directly with Portfolio Manager via web services

Add a Property

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top left is the ENERGY STAR logo, followed by the text "ENERGY STAR® PortfolioManager®". Below this is a navigation bar with four tabs: "MyPortfolio", "Sharing", "Reporting", and "Recognition". The "MyPortfolio" tab is active. In the main content area, there is a white rounded rectangle containing the text "Properties (14)" and a blue button labeled "Add a Property". This button is circled in red. To the right of this rectangle is a grey sidebar with a blue pushpin icon and text that reads "Portfolio M" and "On August reflect curr STAR scor".

Add a Property: Existing Property



Welcome ekatezayko1: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)

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!

Select Property Type



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.](#)



Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

Select number of buildings



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?



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.

Select construction status



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.




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](#).

Get Started!

[Cancel](#)

Basic Property Information

 ENERGY STAR®
PortfolioManager®

Welcome ekatezay

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:

Street Address:

City/Municipality:

State/Province:

Postal Code:

[Year Built:](#)

Gross Floor Area: [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:](#) %

[Occupancy:](#) %

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](#)

Enter Values for Property Use Details

Add Another Type of Use

▼ 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 <input type="text"/> Sq. Ft. <input type="button" value="v"/>	1/1/1990 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1990 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/>		
Number of Cash Registers	<input type="text"/>		
Number of Computers	<input type="text"/>		
★ Number of Open or Closed Refrigerated Units	<input type="text"/>		
Length of All Open or Closed Refrigerated Units	<input type="text"/>		
★ Number of Walk-in Refrigerated Units	<input type="text"/>		
Area of All Walk-in Refrigerated Units	<input type="text"/>		
Cooking Facilities	<input type="text"/>		
★ Percent That Can Be Heated	<input type="text"/>		
★ Percent That Can Be Cooled	<input type="text"/>		

★ This Use Detail is used to calculate

▼ 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	* 12,000 <input type="text"/> Sq. Ft. <input type="button" value="v"/>	1/1/1992 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="button" value="calendar"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	1/1/1992 <input type="button" value="calendar"/>	<input type="checkbox"/>


Property Summary Tab

MyPortfolio
Sharing
Reporting
Recognition

Supermarket A-1



1214 Main Street, Arlington, VA 22201 | [Map It](#)
 Portfolio Manager Property ID: 6836065
 Year Built: 1992
[Edit](#)



Not eligible to apply for
ENERGY STAR
 Certification

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?

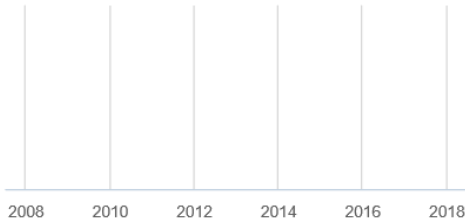
Current: N/A

Baseline: N/A

Summary
Details
Energy
Water
Waste & Materials
Goals
Design

[Refresh](#) to see **Source EUI Trend**

[Change Metric](#)



[Change Metrics](#)
[Change Time Periods](#)

Metrics Summary			
Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Property Summary Tab – Customized Metric Displays

MyPortfolio | Sharing | Reporting | Recognition

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | [Map It](#)
 Portfolio Manager Property ID: 6836065
 Year Built: 1992
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?
Current: [N/A](#)
Baseline: [N/A](#)

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

[Refresh](#) to see **Source EUI** Trend
[Change Metric](#)

[Change Metrics](#)
[Change Time Periods](#)

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Which of the following metrics would you like to display?

- ENERGY STAR Score
- Source EUI (kBtu/ft²)
- Site EUI (kBtu/ft²)
- Weather Normalized Site EUI (kBtu/ft²)
- Weather Normalized Source EUI (kBtu/ft²)
- Water/Wastewater Site EUI (kBtu/gpd)
- Water/Wastewater Source EUI (kBtu/gpd)
- Source Energy Use (kBtu)
- Water Use (All Water Sources) (kgal)
- Total Waste (Disposed and Diverted) (Tons)
- Energy Cost (\$)
- Total Water Cost (All Water Sources) (\$)
- Total Waste (Disposed and Diverted) - Cost (\$)
- Total GHG Emissions (Metric Tons CO₂e)
- Total GHG Emissions Intensity (kgCO₂e/ft²)

[Select Metric](#) [Cancel](#)

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!



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.](#)



To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

Your Property's Buildings

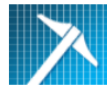
How many physical buildings do you consider part of your property?

- 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?



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.



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.



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](#).

[Get Started!](#)


[Cancel](#)

Campus Configurations

MyPortfolio | Sharing | Reporting | Recognition

Campus

1214 Main Street, Arlington, VA 22201 | [Map It](#)
Portfolio Manager Property ID: 6836065
Year Built: 1992
[Edit](#)

 [Not eligible to apply for ENERGY STAR Certification](#)

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) [Why not score?](#)

Current: [N/A](#)

Baseline: [N/A](#)

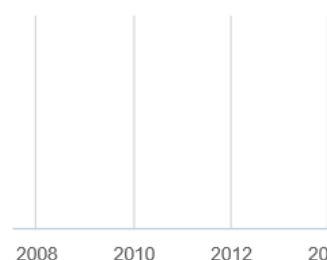
Summary | Details | Energy | Water | Waste & Materials | Goals | Design

[Refresh](#) to see **Source EUI Trend** [Change Metrics](#) [Change Time Periods](#)

[Change Metric](#)

i More About Individual Buildings

This property is a multi-building property, and you haven't added any individual buildings. This is optional. You don't have to add individual buildings unless you would like to track performance separately. This will only be possible if you have your buildings metered individually. Also keep in mind that if you enter individual buildings, you will still need to keep use and meter information about the property as a whole up to date in order to receive accurate metrics about your property (and, in some cases, to apply for the ENERGY STAR). [Learn more about tracking multi-building properties.](#)



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

Meters Tabs

MyPortfolio
Sharing
Reporting
Recognition

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | [Map It](#)

Portfolio Manager Property ID: 6836065

Year Built: 1992

[Edit](#)

[Change Metric](#)

Not eligible to apply for ENERGY STAR Certification

Weather Normalized Source EUI (kBtu/ft²) Why not score?

Current: N/A

Baseline: N/A

Summary
Details

Energy

Water
Waste & Materials
Goals
Design

[Refresh](#) to see **Source EUI Trend**

[Change Metric](#)

[Change Metrics](#)

[Change Time Periods](#)


Metrics Summary			
Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Site EUI (kBtu/ft ²)	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO ₂ e/ft ²)	Not Available	Not Available	N/A
Water Use (All Water Sources) (kgal)	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Tons)	Not Available	Not Available	N/A

Water Tab

MyPortfolio | Sharing | Reporting | Recognition

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | [Map It](#)
Portfolio Manager Property ID: 6836065
Year Built: 1992
[Edit](#)

 [Not eligible to apply for ENERGY STAR Certification](#)

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?

Current: [N/A](#)

Baseline: [N/A](#)

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

Water Use Intensity (All Water Sources) (gal/ft²)

Current WUI: [N/A](#)

Baseline WUI: [N/A](#)

Water Meters - Used to Compute Metrics (0)

[View as a Diagram](#)

[Add A Meter](#)

! In order to receive water metrics for your property, you must provide water meters. You have not entered any meters yet. After [entering the meter](#), you will need to [associate](#) it to receive metrics.

Meter Summary

Waste & Materials Tab

MyPortfolio | Sharing | Reporting | Recognition

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | [Map It](#)
Portfolio Manager Property ID: 6836065
Year Built: 1992
[Edit](#)

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?

Current: [N/A](#)

Baseline: [N/A](#)

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

Meter Summary

0 Waste and Materials Meters Total
In order to receive metrics for your property, you must provide meters. You haven't entered any waste or materials meters yet.

[Add a meter](#)

Current Waste and Materials Date:
[Not Available](#)

[Enter Your Bills](#)

Meters - Used to Compute Metrics (0)

[Add A Meter](#)

Welcome to Waste and Materials Tracking!

Benchmarking your waste and materials (like recycling and donations) is an important part of a comprehensive sustainability strategy. [Learn more about waste and materials tracking.](#)

[Set Up Waste and Materials](#)

Energy Meter Tab

MyPortfolio | Sharing | Reporting | Recognition

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | [Map It](#)
Portfolio Manager Property ID: 6836065
Year Built: 1992
[Edit](#)

Not eligible to apply for ENERGY STAR Certification

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?

Current: [N/A](#)

Baseline: [N/A](#)

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

Meter Summary

0 Energy Meters Total
In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.

[Add A Meter](#)

Current Energy Date
Not Available

[Enter Your Bills](#)

Meters - Used to Compute Metrics (0)

[View as a Diagram](#)

Add A Meter

! There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. [Enter information about your energy meters](#) to begin tracking energy usage. After entering the meter, you will need to [choose to include it in your metrics](#).

For a step-by-step guide to entering meter data, see [How to get Utility Data into Portfolio Manager](#).

Four Ways to Enter Bill Data

1. Manually

Enter 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

About Your Meters for Supermarket A-1

Enter the information below about your new meters. The meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.

2 Energy Meters for Supermarket A-1 (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	C
<input type="checkbox"/>	<input type="text" value="Natural Gas"/>	<input type="text" value="Natural Gas"/> ▼		<div data-bbox="826 559 1083 832"><ul style="list-style-type: none">ccf (hundred cubic feet)cf (cubic feet)Cubic metersGJkBtu (thousand Btu)kcf (thousand cubic feet)MBtu/MMBtu (million Btu)MCF (million cubic feet)therms</div>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid			<input type="text" value=""/>	<input checked="" type="checkbox"/>		<input type="checkbox"/>	

[✖ Delete Selected Entries](#)

[+ Add Another Entry](#)

Back

Create Meters

[Cancel](#)

Follow Us    

[Contact Us](#) | [Privacy Policy](#) | [Browser Requirements](#) | [ENERGY STAR Buildings & Plants Website](#)

Add Energy Consumption Information

Expand meter by clicking arrow

The screenshot shows the ENERGY STAR Portfolio Manager interface. At the top left is the ENERGY STAR logo and the text "ENERGY STAR® PortfolioManager®". At the top right, it says "Welcome Kaye Lynch-Sparks: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)". A green message box states: "Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later." Below this is the heading "Your Meter Entries for Supermarket A-1" and the text "Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!". Underneath, it says "3 Energy Meter(s) for Supermarket A-1". A list of three meters is shown: "Natural Gas [Edit](#)", "Fuel Oil (No. 2) [Edit](#)", and "Electric Grid Meter [Edit](#)". A red circle highlights the right-pointing arrow next to "Natural Gas". At the bottom left is a "Back" button, and at the bottom right are "Continue" and "Cancel" buttons. The footer includes "Follow Us" with social media icons for Twitter, Facebook, YouTube, and LinkedIn, and a row of links: "Contact Us", "Privacy Policy", "Browser Requirements", and "ENERGY STAR Buildings & Plants Website".

Add Meter Entries and Fill in Data

Basic Meter Information

Monthly Entries

Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

Delete Selected Entries
 Add Another Entry
 Learn how to copy/paste

Upload data in bulk for this meter:

You can copy/paste into the table above ([instructions in this FAQ](#)), or upload an Excel spreadsheet using our simple [spreadsheet template](#).

No file chosen

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

Use a spreadsheet to upload or copy and paste

Add another entry

Meters to Add to Total Consumption

MyPortfolio Sharing Reporting Recognition

Your meter entries have been added to your meters!

Select Energy Meters to Include in Metrics

Tell us which meters to include when calculating the Energy metrics for [Supermarket A-1](#) so that we can provide you with the most accurate metrics possible.

Summary

3

Please tell us what your meters represent.

Energy Meters

Select all meters to be included in your Energy metrics. (Hint: All meters should be included unless they are [sub-meters](#).)

<input type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	Fuel Oil (No. 2) 30521002	Fuel Oil (No. 2)
<input checked="" type="checkbox"/>	Natural Gas 30521001	Natural Gas
<input checked="" type="checkbox"/>	Electric Grid Meter 30521003	Electric - Grid

Total of 3 meter(s). Tell us what this represents:

- These meter(s) account for the total energy consumption for [Supermarket A-1](#) (a single building).
- These meter(s) do not account for the total energy consumption for [Supermarket A-1](#) (a single building).

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

.....

Apply Selections Cancel

Energy Meters Tab: Meters Added and Displayed

MyPortfolio | Sharing | Reporting | Recognition

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

Supermarket A-1
 1214 Main Street, Arlington, VA 22201 | [Map It](#)
 Portfolio Manager Property ID: 6836065
 Year Built: 1992 | [Edit](#)

[Change Metric](#)

Weather Normalized Source EUI (kBtu/ft²) Why not score?
Current: [N/A](#)
Baseline: [N/A](#)

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

Meter Summary
 5 Energy Meters Total
 3 - Used to Compute Metrics
 2 - Not Used in Metrics

[Add A Meter](#)

Current Energy Date
Not Available

[Enter Your Bills](#)

Four Ways to Enter Bill Data

Meters - Used to Compute Metrics (3) [Add A Meter](#)

[Change Meter Selections](#)
[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter 56291144	Electric - Grid		Yes
Fuel Oil (No. 2) 56291143	Fuel Oil (No. 2)		Yes
Natural Gas 56291142	Natural Gas		Yes

[Download Annual Totals by Meter](#)

Notification

Add or update bills

View Meter Data and Manage Bills for Your Property


Monthly Entries

Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Update
<input type="checkbox"/>	1/1/2019	2/1/2019	532,173	39,900.00	<input type="checkbox"/>	<input type="checkbox"/>	1,293	13,304.00	
<input type="checkbox"/>	2/1/2019	3/1/2019	518,833	37,500.00	<input type="checkbox"/>	<input type="checkbox"/>	1,261	12,970.00	
<input type="checkbox"/>	3/1/2019	4/1/2019	516,496	37,245.00	<input type="checkbox"/>	<input type="checkbox"/>	1,255	12,912.00	
<input type="checkbox"/>	4/1/2019	5/1/2019	500,123	35,689.00	<input type="checkbox"/>	<input type="checkbox"/>	1,214	12,503.00	

[Delete Selected Entries](#)
[Add Another Entry](#)
[Learn how to copy/paste](#)
[Delete All Entries](#)

Upload data in bulk for this meter:

 You can use the single-meter spreadsheet to either: "Upload" the file below, or copy and paste the data from the spreadsheet into the table above ([instructions in this FAQ](#)). Use this single-meter [spreadsheet template](#).

[Cancel](#)

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

Reporting Tab

The screenshot shows the 'Reporting' tab in a software interface. At the top, there are navigation tabs: 'MyPortfolio', 'Sharing', 'Reporting' (selected), 'Recognition', 'Admin', and 'Processing'. Below these, the interface is divided into two main sections. On the left, under 'Charts & Graphs', there are several colorful icons representing different data visualizations. A red arrow points from the text 'Choose from pre-set chart & graph options' to these icons. In the center, there is a large orange icon with a factory and a circular arrow, with the text 'Total GHG Emissions Intensity' and 'What is the carbon footprint resulting from my properties' energy use?'. On the right, under 'ENERGY STAR Performance Documents', there is a list of document links: 'Statement of Energy Performance (SEP)', 'Statement of Energy Design Intent (SEDI)', 'Data Verification Checklist', 'Progress & Goals Report', 'ENERGY STAR Scorecard', and 'Water Scorecard'. A red arrow points from the text 'Download performance documents' to this list. Below these sections, there are two tabs: 'My Custom Reports' and 'ENERGY STAR Reports'. A blue button labeled 'Create a New Template' is located to the right of the 'ENERGY STAR Reports' tab. Below the tabs is a table with the following data:

Name	Status	Action
Energy Performance	Last Modified: 1/28/2020 10:52 AM	I want to...
Waste Performance	Last Modified: 1/28/2020 5:59 AM	I want to...
Partner of the Year Report	Last Modified: 1/27/2020 1:42 PM	I want to...
ENERGY STAR Certification Status	Last Modified: 1/27/2020 10:10 AM	I want to...
Emissions Performance	Last Modified: 1/26/2020 12:01 PM	I want to...
Water Performance	Last Modified: 1/24/2020 11:36 AM	I want to...

A red arrow points from the text 'Create and generate templates & reports' to the 'ENERGY STAR Reports' tab and the table.







Choose from pre-set chart & graph options

Download performance documents

Create and generate templates & reports

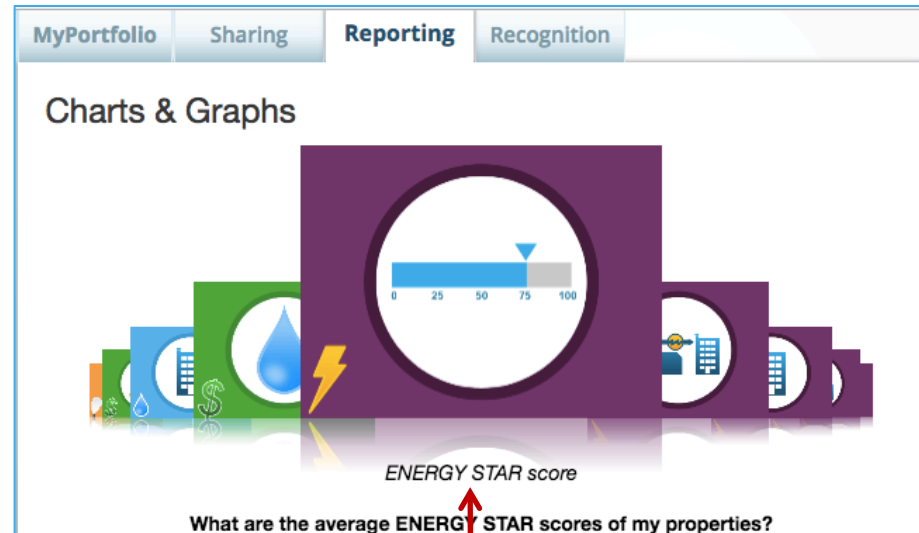
Performance Documents

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](#)

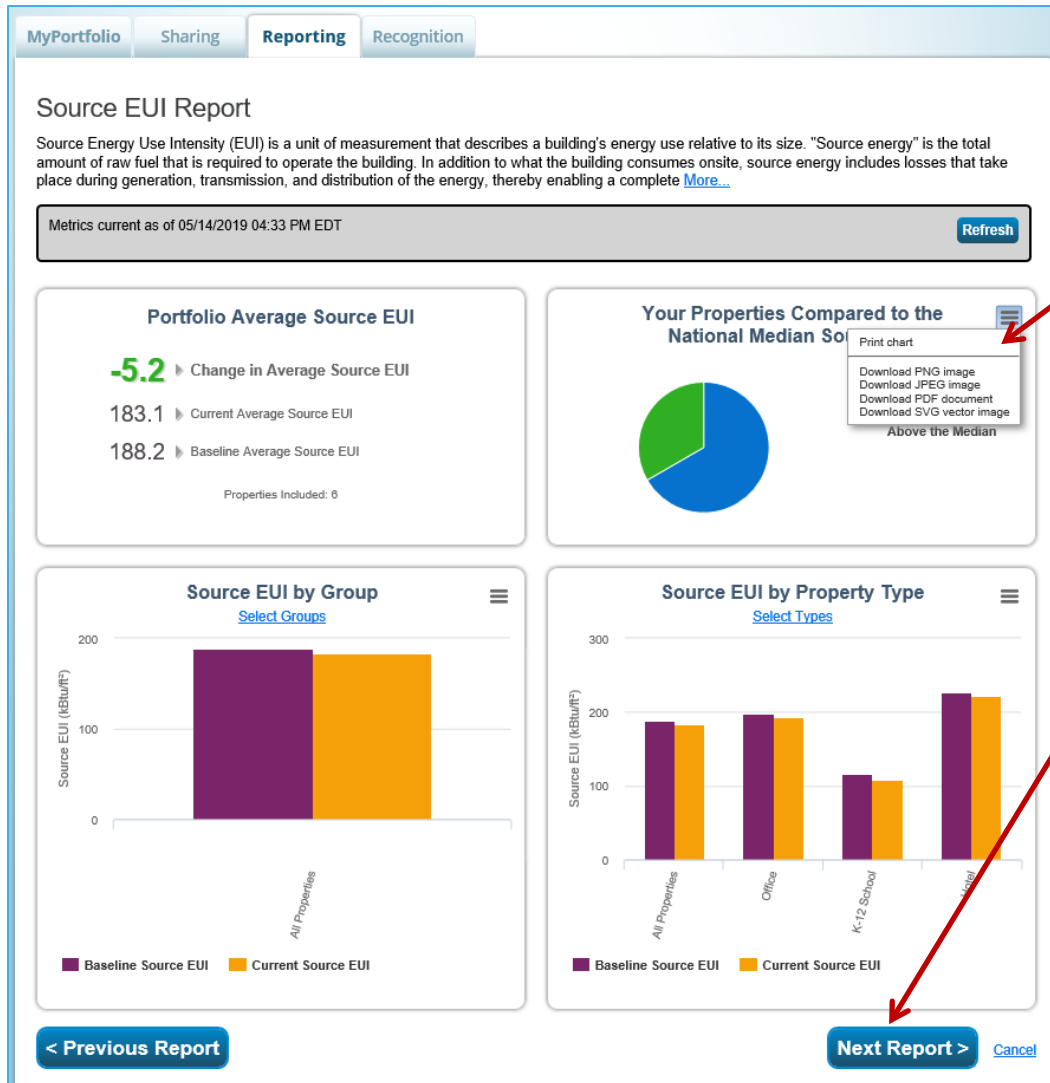
Charts & Graphs

- 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



Scroll through to
see available
Charts & Graphs.

Charts & Graphs



Print or download figures for use externally


View the next chart

Scroll to bottom to view and export raw data

Reporting Tab

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

Charts & Graphs



Total GHG Emissions Intensity
What is the carbon footprint resulting from my properties' energy use?

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](#)

My Custom Reports | **ENERGY STAR Reports** | [Create a New Template](#)

Name	Status	Action
Energy Performance	Last Modified: 1/28/2020 10:52 AM	I want to...
Waste Performance	Last Modified: 1/28/2020 5:59 AM	I want to...
Partner of the Year Report	Last Modified: 1/27/2020 1:42 PM	I want to...
ENERGY STAR Certification Status	Last Modified: 1/27/2020 10:10 AM	I want to...
Emissions Performance	Last Modified: 1/26/2020 12:01 PM	I want to...
Water Performance	Last Modified: 1/24/2020 11:36 AM	I want to...

Create and generate templates & reports

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

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
- Register for regular webinars at: <http://esbuildings.webex.com>
- Portfolio Manager Technical Reference Series:
http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_model_tech_desc

Survey on COVID-19 energy impacts

- For many buildings, the response to COVID-19 has resulted in significant changes in operations and energy use, which in turn may be reflected in ENERGY STAR scores and related metrics.
- To help us assess these impacts, we're asking for you to [participate in a survey](#) designed to provide us with information about these changes across building types.
- Your input is critical to our analysis and will allow us to provide you with the best guidance for benchmarking your buildings and tracking energy efficiency.
- Survey should take less than 10 minutes to complete
- Survey deadline extended until Tuesday, June 9

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