

EPA's new Portfolio Manager tool



Rev up your
building's energy
performance

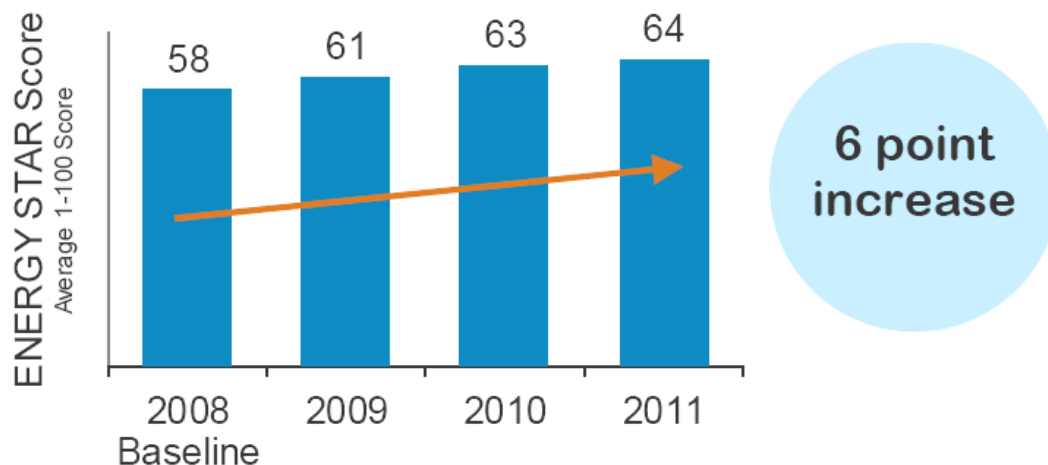
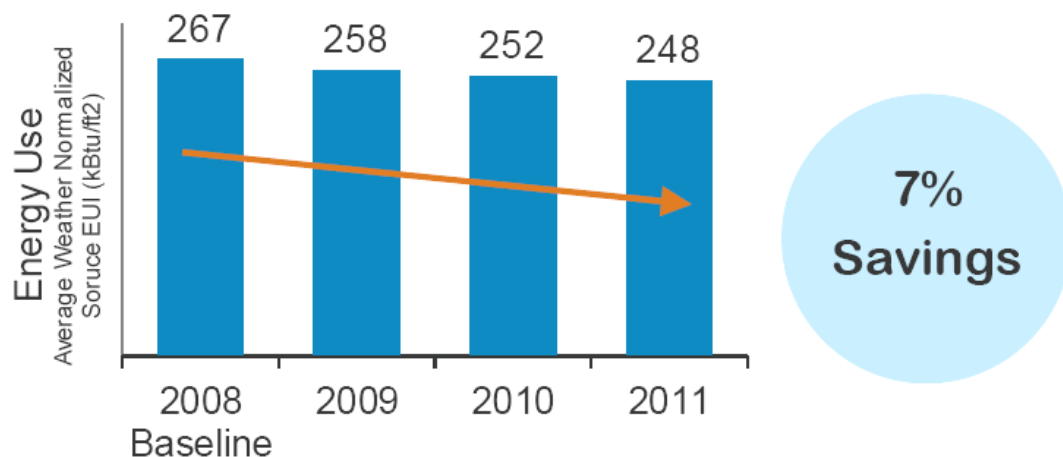
ENERGY STAR®

Portfolio Manager®

Value of Benchmarking

Consistent benchmarking in buildings results in energy savings and improved performance

Energy Savings in Portfolio Manager



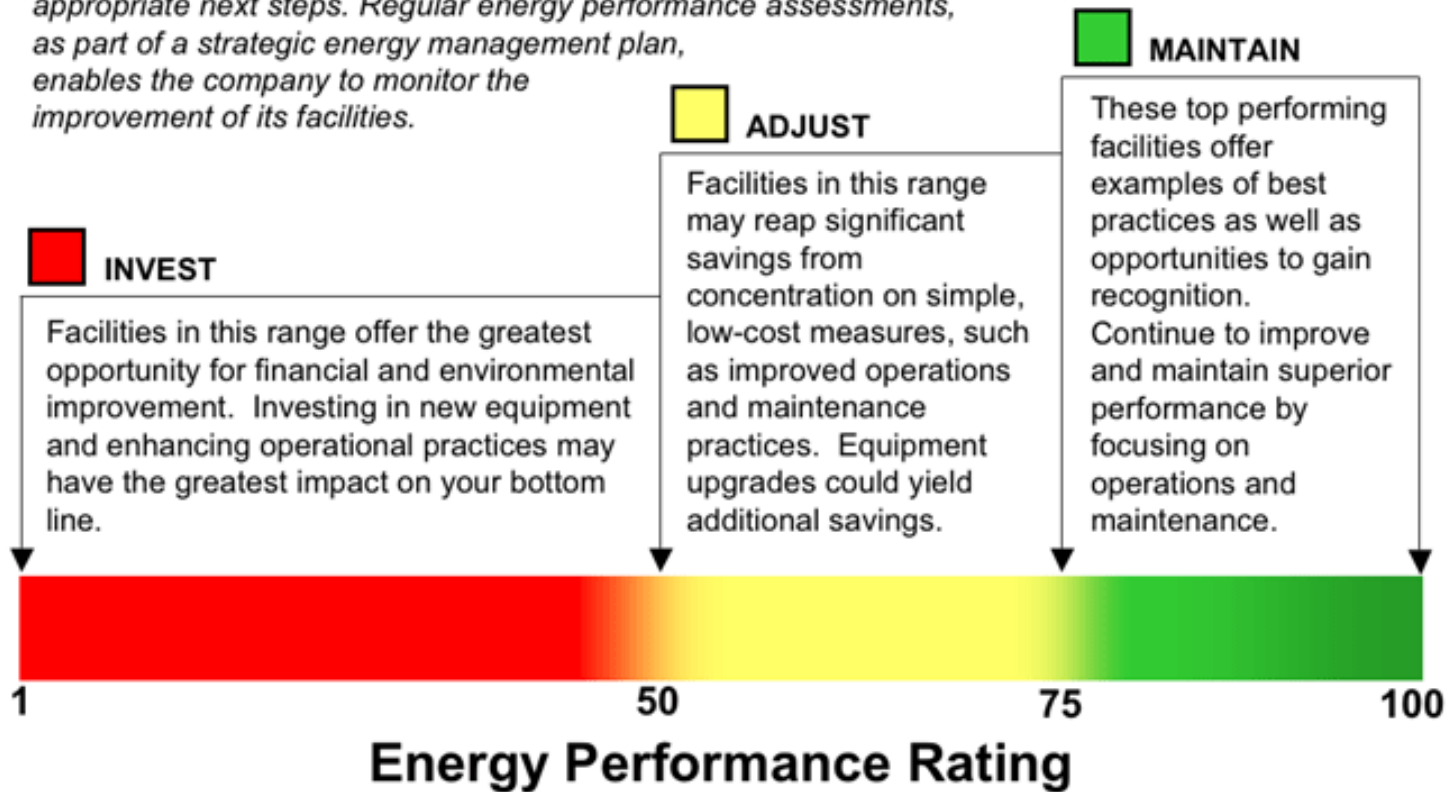
Source: http://www.energystar.gov/ia/business/downloads/datatrends/DataTrends_Savings_20121002.pdf?8d81-8322

Understand Comparative Performance

- ALL buildings can be benchmarked
- Benchmarking through Portfolio Manager enables you to:
 - Compare one building against a national sample of similar buildings
 - Compare all of your buildings of a similar type to each other
 - Set priorities and targets for the use of limited staff time and/or investment capital
 - Track performance over time and gain recognition

Determining a Course of Action

Establish an energy performance baseline for all facilities in the company's portfolio, then set performance goals and create an action plan. The guide below can help determine the appropriate next steps. Regular energy performance assessments, as part of a strategic energy management plan, enables the company to monitor the improvement of its facilities.



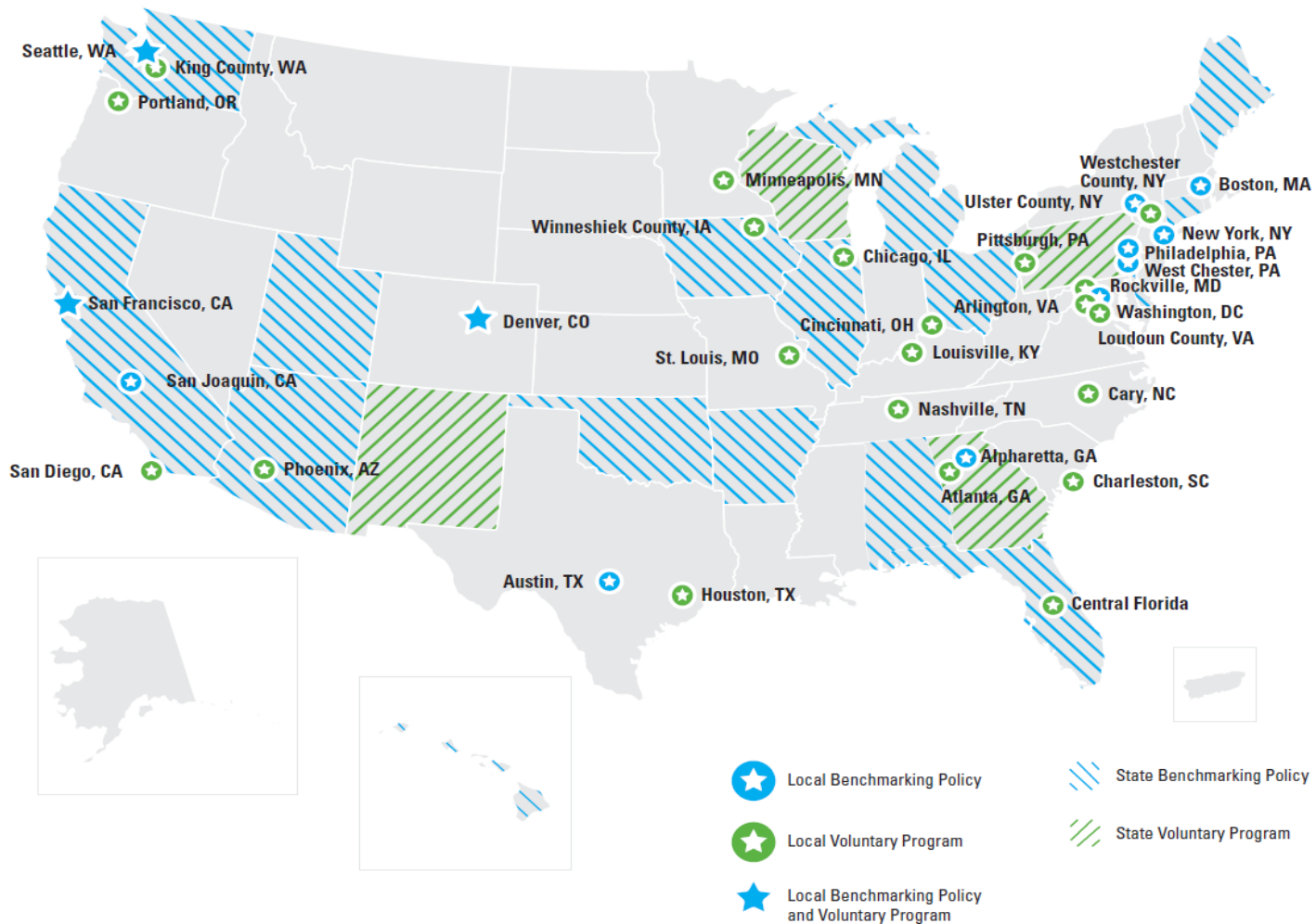
EPA's New Portfolio Manager

With the new Portfolio Manager: Available July 17!

- Navigate with ease
- Enter data quickly and accurately
- Connect and share with others
- Plan and set goals
- Display data in colorful charts & graphs
- Apply online for the ENERGY STAR

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ENERGY STAR Benchmarking Policies

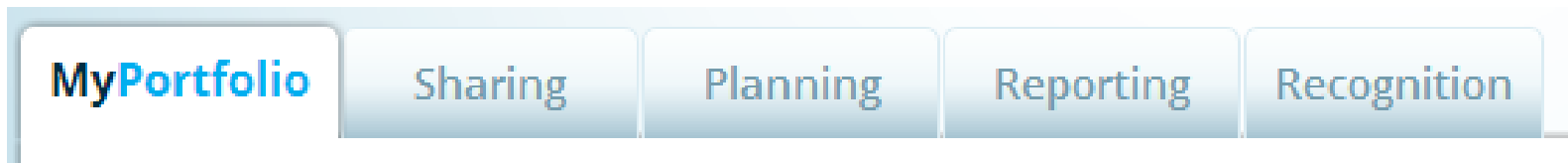


To Get Started Benchmarking in Portfolio Manager

- Helpful data to have on hand
 - Property Information
 - Function
 - Name, street address, ZIP/postal code
 - Property type data
 - Gross floor area
 - Use details (ex. weekly operating hours, number of computers, number of workers on the main shift, etc)
 - Energy consumption data
 - Property-specific invoice information from all purchased and on-site generated energy for all fuel types

Navigate the New Portfolio Manager

Five portfolio level tabs



Five property tabs



Intuitive navigation – multiple ways
to get to the same place

Navigate the New Portfolio Manager

Portfolio level

The screenshot displays the Energy Star Portfolio Manager interface. At the top left is the Energy Star logo and the text "ENERGY STAR® PortfolioManager™". On the top right, there are links for "Welcome", "Account Settings", "Contacts", "Help", "Sign Out", and "Language: English | Français". Below the header is a navigation bar with tabs for "MyPortfolio", "Sharing", "Planning", "Reporting", and "Recognition".

The main content area is divided into several sections:

- Properties (5)**: A box with an "Add a Property" button.
- Notifications (0)**: A box stating "You have no new notifications."
- Source EUI Trend**: A line chart showing Source EUI from 2002 to 2012. The y-axis ranges from 0 to 1,000. The data points are approximately: 2002: 480, 2003: 480, 2004: 480, 2005: 480, 2006: 450, 2007: 420, 2008: 850, 2009: 150, 2010: 400, 2011: 150, 2012: 250.
- Total GHG Emissions Trend**: A line chart showing Total GHG Emissions from 2002 to 2012. The y-axis ranges from 0k to 40k. The data points are approximately: 2002: 15k, 2003: 15k, 2004: 15k, 2005: 15k, 2006: 15k, 2007: 15k, 2008: 38k, 2009: 1k, 2010: 15k, 2011: 1k, 2012: 1k.
- My Properties (5)**: A table listing properties with a "Filter by" dropdown set to "View All Properties (5)", a search box, and a "Search" button. Below the search are links for "Create Group" and "Manage Groups".

Name	Action
Federal Building	I want to... <input type="button" value="v"/>
Higher Campus	I want to... <input type="button" value="v"/>
Hill Store	I want to... <input type="button" value="v"/>
Insurance Office	I want to... <input type="button" value="v"/>
Sunnyside Elementary	I want to... <input type="button" value="v"/>

At the bottom of the table is a pagination bar showing "Page 1 of 1" and "View 1 - 5 of 5". Below the table is a "Download Entire Portfolio" button.

A red arrow points from the text "Portfolio level" to the "MyPortfolio" tab.

! If you're a pro, you may want to [upload and/or update multiple properties](#) at once using an Excel spreadsheet. This can be done to create new properties, add use details, create meters and add meter consumption data.

Navigate with ease

Property level summary page

The screenshot displays 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 JENNY: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)" and "Language: [English](#) | [Français](#)". Below the header is a navigation bar with tabs: "MyPortfolio", "Sharing", "Planning", "Reporting", and "Recognition". The main content area is titled "Insurance Office" and includes the address "5201 Blue Lagoon Dr, Arlington, VA 20221 | [Map It](#) EXISTING", "Portfolio Manager Property ID: 5000047 | Primarily: [Office](#)", and "Year Built: 1995 EXISTING". On the right, a box shows the "ENERGY STAR Score" with a "Current Score: 80" and a "Baseline Score: 80". Below this is a sub-navigation bar with tabs: "Summary", "Details", "Meters", "Goals", and "Design". The "Summary" tab is active, showing a "Source EUI Trend" line graph with data points for 2007, 2008, 2010, and 2012. To the right of the graph are sections for "Notifications" (stating "You have no new notifications.") and "Sharing this Property". The sharing section shows "Shared with: 1 [Contacts](#) ([ABS](#))" and an "Enter name" input field with a "Share" button. Below is a table of permissions:

Name	Permissions	Action
Sullivan, Alexandra	Full Access	I want to... <input type="button" value="v"/>

At the bottom right of the sharing section is an "Edit Multiple Permissions" button.

Enter data quickly & accurately

New data entry wizards to walk you through the process step-by-step

More spreadsheet template import options

Improved alert messages highlight errors

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Welcome laurengitcher: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Français](#)

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

[Learn more about functions](#)

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
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.

Tip
To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#). You can use our handy [data collection worksheet](#), in advance, to prepare the information that you will need to complete this process.

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.

Get Started! [Cancel](#)

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Enter data quickly & accurately

3 ways to enter data for your property or portfolio:

1. Enter data manually
2. Upload data using spreadsheet templates
3. Work with 3rd party providers that exchange data directly with Portfolio Manager via web services

Get Data In: Manually with the help of Portfolio Manager prompts

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MyPortfolio | Sharing | Planning | Reporting | Recognition

Properties (5)

Add a Property

Notifications (0)

You have no new notifications.

Source EUI Trend

1,000

500

My Properties (5)

Filter by: [Create Group](#) | [Manage](#)

Name
Federal Building

Enter data quickly – Spreadsheet Upload

MyPortfolio

Sharing

Planning

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 than [entering each property manually](#) or adding bills manually. There are specific steps to use these spreadsheets. Learn more below.

What do you want to upload first?

- **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 your 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 finished entering information in your upload template (either standard or custom), upload it here. Processing time could be affected by file size.

Type of Upload: *

Upload Template: * No file chosen

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

 Depending on internet speeds, files larger than XX MG may not be able to be successfully uploaded to the server before the session times out. We advise files smaller than XX MG.

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.

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Enter data quickly – Web Services

- Enables energy service companies and utilities to exchange data with Portfolio Manager to
 - Manage building and energy data for customers
 - Access the ENERGY STAR score and other performance metrics from Portfolio Manager
- Users taking advantage of web services will need to “connect” with their web service provider

Enter data quickly – Set up a Property


Follow guided steps to get your property and meters set up quickly

**ENERGY STAR®**
PortfolioManager™

Welcome : [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Franca](#)


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[Cancel](#)

Enter data quickly – Set up meters

Simply identify the sources of your energy and water, and the number of associated meters

ENERGY STAR PortfolioManager™

Welcome | Account Settings | Contacts | Help | Sign Out
Language: English | Français

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

How does your property acquire energy? Please select all that apply.

- Electric
- Natural Gas
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water

Don't see your energy sources?
[+ See more energy sources?](#)

Your Property's Water Usage

How does your property use water? Please select all that apply.

- [Municipally Supplied Potable Water](#)
- [Municipally Supplied Reclaimed Water](#)
- [Alternative Water Generated On-Site](#)
- Other

Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an on-site 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.

Entering Your Meters in Bulk

For advanced users, you may prefer to use the upload tool to [get up all of your meters with one click](#).

Automate Your Meter Entries

If you have a lot of meters, you may want to consider hiring an organization that exchanges data to automatically update your energy consumption. [Learn more](#)

Get Started! [Cancel](#)

Set up meters



Sources of Your Property's Energy

How does your property acquire energy? Please select all that apply.

- Electric
 - purchased from the grid
How Many Meters?
 - generated on site with my own solar panels
 - generated on site with my own wind turbines
- Natural Gas
How Many Meters?
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water

Don't see your energy sources?

+ [See more energy sources?](#)



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Your Property's Water Usage

How does your property use water? Please select all that apply.

- [Municipally Supplied Potable Water](#)
 - Indoor
How Many Meters?
 - Outdoor
 - All
- [Municipally Supplied Reclaimed Water](#)
- [Alternative Water Generated On-Site](#)
- [Other](#)

Enter data accurately



Welcome JENNYS: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Français](#)

Manage Bills (Meter Entries) for [Insurance Office](#)

You may select one of your meters to get started. Or, if you are coming here from your meter list, a meter may already be selected.

Tell us which meter you would like to enter or manage bill information for:

Electricity has a gap of 35 days between the dates of 11/30/2005 and 01/05/2006. Please close the gap.
Electricity has a gap of 29 days between the dates of 03/06/2006 and 04/05/2006. Please close the gap.
Electricity has an overlap where 01/01/2009 precedes 01/02/2009. Please remove the overlap.
Electricity has an overlap where 03/07/2011 precedes 04/01/2011. Please remove the overlap.
Electricity has an overlap where 04/01/2011 precedes 04/04/2011. Please remove the overlap.

Electricity

Select Meter



Don't see the meter you are looking for? [Add another meter](#)

<input type="checkbox"/>	Start Date	End Date	Usage	Cost	Estimation	Green Power?
<input type="checkbox"/>	9/1/2005	9/30/2005	427920 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	10/1/2005	10/31/2005	369840 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	11/1/2005	11/30/2005	384960 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
Electricity has a gap of 35 days between the dates of 11/30/2005 and 01/05/2006. Please close the gap.						
<input type="checkbox"/>	1/5/2006	2/3/2006	354960 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2/4/2006	3/6/2006	357360 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>
Electricity has a gap of 29 days between the dates of 03/06/2006 and 04/05/2006. Please close the gap.						
<input type="checkbox"/>	4/5/2006	5/3/2006	366720 kWh (thousand Watt-hours)		<input type="checkbox"/>	<input type="checkbox"/>

Automatic alerts catch and identify where you have a gap or overlap in meter data



Connect and Share

Ability to search for other users and form a “connection”

Share multiple properties at once and customize sharing rights

Set access levels for multiple properties and contacts and the same time

The screenshot shows the 'Sharing' tab in the ENERGY STAR Portfolio Manager interface. The top navigation bar includes 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. The user is logged in as 'giulianom'.

My Shared Properties (1)

Sharing Notifications (0)
You have no new notifications.

My Shared Properties (1)

Sort by: Property Name

Name	Permissions	Action
Insurance Office		
Sullivan, Alexandra	Full Access	I want to...

Properties Shared with Me (2)

Name	Shared from	Permissions	Action
Higher Campus	Sullivan, Alexandra	Full Access	I want to...
Building D	Sullivan, Alexandra	Full Access	I want to...

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Sharing

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Language: [English](#) | [Français](#)

MyPortfolio **Sharing** Planning Reporting Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

Select Permissions for Each Contact

The access levels you select do not have to be the same for each property or each person.

Sort by:

Name (ID)	None	Read Only Access	Full Access	Custom Access	Exchange Data
▼ Federal Building (5000021)					
Stafford, Samantha	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[Share Property\(ies\)](#) [Cancel](#)

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Click arrow to show/hide permissions options

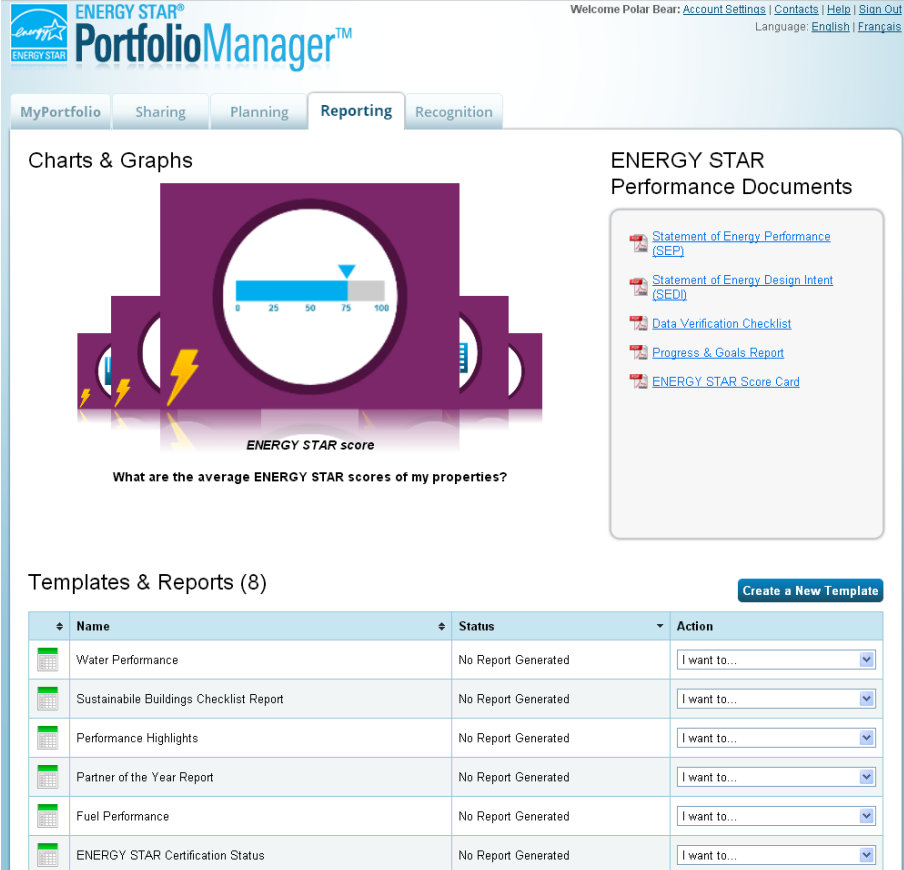
Choose permissions

Reporting

New graphs and table throughout the tool

Graphs can be easily exported as images for use in your presentations and reports

Expanded feature to create a big table with your own selected metrics and export to Excel

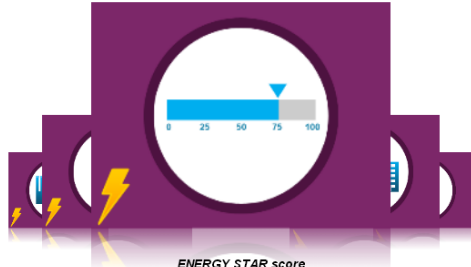


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Welcome Polar Bear: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Français](#)

MyPortfolio | Sharing | Planning | **Reporting** | Recognition

Charts & Graphs



ENERGY STAR score

What are the average ENERGY STAR scores of my properties?

ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Score Card](#)

Templates & Reports (8) [Create a New Template](#)

Name	Status	Action
Water Performance	No Report Generated	<input type="text" value="I want to..."/>
Sustainable Buildings Checklist Report	No Report Generated	<input type="text" value="I want to..."/>
Performance Highlights	No Report Generated	<input type="text" value="I want to..."/>
Partner of the Year Report	No Report Generated	<input type="text" value="I want to..."/>
Fuel Performance	No Report Generated	<input type="text" value="I want to..."/>
ENERGY STAR Certification Status	No Report Generated	<input type="text" value="I want to..."/>

Reporting

Welcome Polar Bear: [Account Settings](#) | [Contacts](#) | [Help](#) | [Sign Out](#)
Language: [English](#) | [Français](#)

MyPortfolio | Sharing | Planning | **Reporting** | Recognition

Charts & Graphs

Choose from Pre-set Chart & Graph options

ENERGY STAR score

What are the average ENERGY STAR scores of my properties?

ENERGY STAR Performance Documents

Download Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
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Templates & Reports (8)

Create a New Template

Name	Status	Action
Water Performance	No Report Generated	I want to...
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Performance Highlights	No Report Generated	I want to...
Partner of the Year Report	No Report Generated	I want to...
Fuel Performance	No Report Generated	I want to...
ENERGY STAR Certification Status	No Report Generated	I want to...

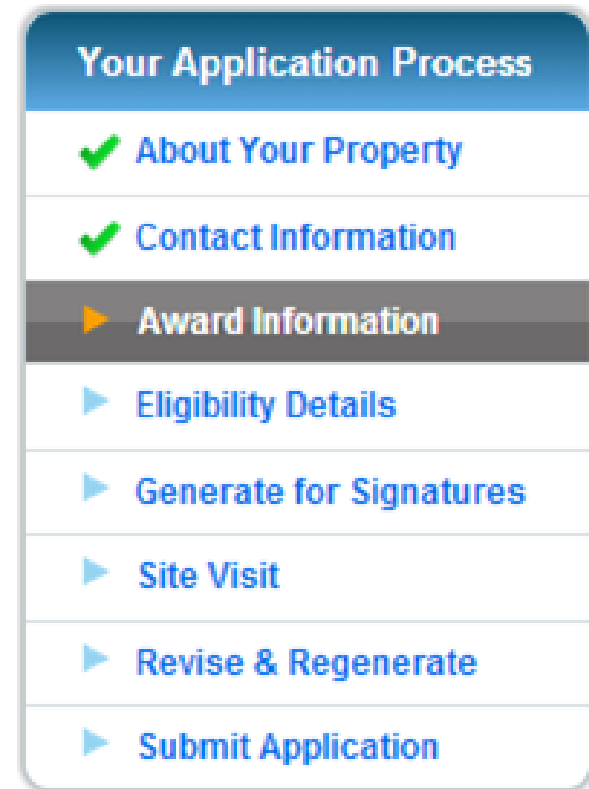
Applying for the ENERGY STAR

A new “progress widget” shows all the steps in the process

Go back and edit your data from within the application

Re-generate a revised application on your own

Submit applications online!



Recap

With the new Portfolio Manager

- Navigate with ease
- Enter data quickly and accurately
- Connect and share with others
- Plan and set goals
- Display data in colorful charts & graphs
- Apply online for the ENERGY STAR

Linda Darveau

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