Portfolio Manager is an interactive online energy management tool that allows a business to track and assess energy consumption. You can track and assess energy consumption whether you own, manage or rent (if you pay your utility). The program is available through the ENERGY STAR® website (www.energystar.gov/benchmark). There is no cost to use the program.

Create an Account

Create Your Account:

The first step to using Portfolio Manager is to CLICK Register and set up your account by entering the following required information.

Username: ____________________________

Password: ____________________________

Confirm Password: ____________________________

About Yourself:

First Name: ____________________________

Last Name: ____________________________

Job Title: ____________________________

Email: ____________________________

Confirm Email: ____________________________

Phone: ____________________________

Country: ____________________________

Language: ____________________________

Reporting Units: ____________________________

Street Address: ____________________________

City/Municipality: ____________________________

State/Province: ____________________________

Postal Code: ____________________________
Create an Account - continued

About Your Organization

Organization Name: ____________________________
Primary Business or Service of Your Organization: ____________________________
Is your organization an ENERGY STAR Partner?: ____________________________
Will you be entering data for yourself or others via web services?: ____________

Searchability in Portfolio Manager

Can other people search for you and send you a connection request? Yes  No
(You can connect with other people in Portfolio Manager to easily share information. Your account must be searchable in
order for others to send you a connection request.)

Recovering Access to Your Account

Security Question 1: drop down menu
Your Answer:
Security Question 2: drop down menu
Your Answer:

When you have completed all of the required fields,

CLICK Create My Account button

At this point, you will be returned to the PortfolioManager home page. There will be a message
stating that your account has been created. The next step is setting up your first building by
adding a property to your account. You may continue with property data input or you may sign
out and return at a later time to add additional information to your account.
Adding a Property

MyPortfolio tab

CLICK Add a Property button

Set up a Property: Let’s Get Started!

Your Property’s Primary Function - (select from drop down menu)

Your Property’s Buildings - select one of the following:

  None: My property is a 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

  Existing or Design Project

Set Up a Property: Basic Property Information

About Your Property

Name: ____________________________________________

County: __________________________________________

Street Address: __________________________________

City/Municipality: ________________________________

State/Province: _________________________________

Postal Code: _________________________________

Year Built: ______________________________________

Gross Floor Area: ________________________________

Occupancy (% of building occupied): __________________

Do any of these apply? (These questions are generated based on the property function.)

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

CLICK Get Started! button
Adding a Property - continued

Set up a Property: How is it Used?

Building Use - Property Use Detail
Gross Floor Area: ________________________________
Weekly Operating Hours: ________________________________
Number of Computers (this number should include servers): ______
Number of Workers on Main Shift: ________________________________
Percent That Can Be Heated (see drop down menu below): ______
Percent That Can Be Cooled (see drop down menu below): ______
  Drop down menu: 50% or more
  Less than 50%
  Not heated

Parking Use - Property Use Detail
Open Parking Lot Size: ________________________________
Partially Enclosed Parking Garage Size: ________________________________
Completely Enclosed Parking Garage Size: ________________________________
Supplemental Heating: ________________________________

CLICK Add Property button

You will be directed back to the MyPortfolio homepage and there will be a message stating that you have successfully created your property. The next step is adding energy use information.
Add a Meter

MyPortfolio

Meters Tab

CLICK Add Another Meter button

Get Started Setting Up Meters

There is a list of eight energy sources, plus a list of ten additional energy sources you can access. Select all energy sources that apply to your property. Based on the fuel source(s) you select, additional data will be required. As an example:

Check Electric

Check purchased from the grid

How Many Meters? (Enter the number of electric meters): __________

You can also set up water usage on this page. When you have completed your utility meter setup,

CLICK Get Started! button

About Your Meters

Each of the energy source meters you identified on the previous screen will be listed under Energy Meter(s). If you elected to track water usage, those meter(s) are listed under Water Meter(s) on this screen.

Check the box of the first energy meter for which you will enter data
Type: this field is automatically populated based on your input on the previous screen
Units: CLICK on the space and use the drop down menu
First Bill Date (for meters currently in use): MM/DD/YYYY
If you have a meter that is no longer in use,
Last Bill Date:
For fuels delivered in bulk: Check the box Enter as Delivery?

Complete this information for each meter

CLICK Continue button
Add a Meter - Continued

Your Meter Entries

Begin entering utility usage data.

CLICK Click to add an entry

Required Input includes:
  Start Date
  End Date
  Usage

Optional data: Cost

Estimation: check this box if the statement usage is an estimate

Green Power: check box if appropriate

CLICK Add Another Entry to add information for each month for which you have utility data. (Enter a minimum of thirteen (13) months of energy data when creating an account.)

When all energy data for all meters is complete,

CLICK Finish Meter Set Up button

Meters to add to Total Consumption for Metrics
(notice the green banner, stating that meters were successfully added)

Property Totals
Check the box next to each meter name that should be included in the energy metrics for your building.

CLICK Apply Selections button

You will be directed back to the MyPortfolio homepage and there will be a message stating that you have successfully associated meters to your property(ies). The next step is generating energy performance reports for your property.
Generating Reports

You can generate energy use reports for your building from the Portfolio Manager home page. Locate the series of five tabs labeled MyPortfolio, Sharing, Planning, Reporting and Recognition.

**CLICK Reporting** tab

On the right, note the title, ENERGY STAR Performance Documents

**CLICK Statement of Energy Performance (SEP)**

1 - Select Report(s) to Download

   Check the boxes for the following:

   - [ ] Statement of Energy Performance (SEP)
   - [ ] ENERGY STAR Data Verification Checklist
   - [ ] Score Card

2 - Select Property for Report(s)

   Select your building’s name from the drop down menu

3 - Select Timeframe for Report(s)

   - Current Year (default)
   - Baseline Year
   - Single Year (requires month and year)

4 - Select Contacts for Report(s)

   Selections are optional

   **CLICK Generate and Download Report(s)** button

Your browser must allow popups from the ENERGY STAR website in order to view your reports. You may save the reports to your computer after they are generated.

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