



Using Portfolio Manager to Rate the Energy Performance of Office Space

QUICK REFERENCE GUIDE
Version 2.1



Use ENERGY STAR's online Portfolio Manager to rate the energy performance of your office building on a scale of 1 – 100. Rating all of your facilities and updating the data regularly will help you take control of your organization's energy performance.

Using Portfolio Manager Step by Step

Step	Activity Description	Key Stroke
1	Connect to the Portfolio Manager webpage	http://www.energystar.gov/benchmark
2	Login to your ENERGY STAR account <ul style="list-style-type: none"> ➤ If you don't have an account ➤ If you would like a brief review of Portfolio Manager 	Enter user name and password, then click LOGIN <ul style="list-style-type: none"> ➤ Click NEW USER and enter information ➤ Click SYSTEM TOUR
3	Review new features and continue on to your portfolio	Click ACCESS MY PORTFOLIO to view your portfolio
4	To add a new building	Click ADD FACILITY
5	Enter general building information	Enter data and click SAVE
6	If applicable, add new organizations and contacts with which your building is associated	Click ADD NEW ORGANIZATION or ADD NEW CONTACT , then click DONE <i>You are now at your new building's Facility Summary page</i>
7	Enter space use data	On the new building's Facility Summary page, in the second box entitled "Space Use," click ADD SPACE <ul style="list-style-type: none"> ⇒ Enter a space name and select the space type ⇒ Click CONTINUE ⇒ Input space information ⇒ Click SAVE <i>You are now returned to the new building's Facility Summary page.</i>
8	Enter energy use data	On the new building's Facility Summary page, in the third box entitled "Energy Meters," click ADD METER <ul style="list-style-type: none"> ⇒ Input the requested information ⇒ Click SAVE ⇒ Input the requested information. ⇒ Click CONTINUE ⇒ Enter your energy information ⇒ Click SAVE <i>You are now returned to the new building's Facility Summary page.</i>
9	Review and interpret results	On the new building's Facility Summary page, in the first box entitled "Facility Performance," review your results Guidance on the score interpretation can be found on page 2 of this Quick Reference Guide

ELIGIBILITY CRITERIA

To use the rating system properties must be:

- At least 5,000 square feet
- At least 50% office space and not more than 10% computer data space
- Operated a minimum of 30 hours per week
- Operated for at least 12 months
- Occupied by 1 person per 100-3,000 sq ft

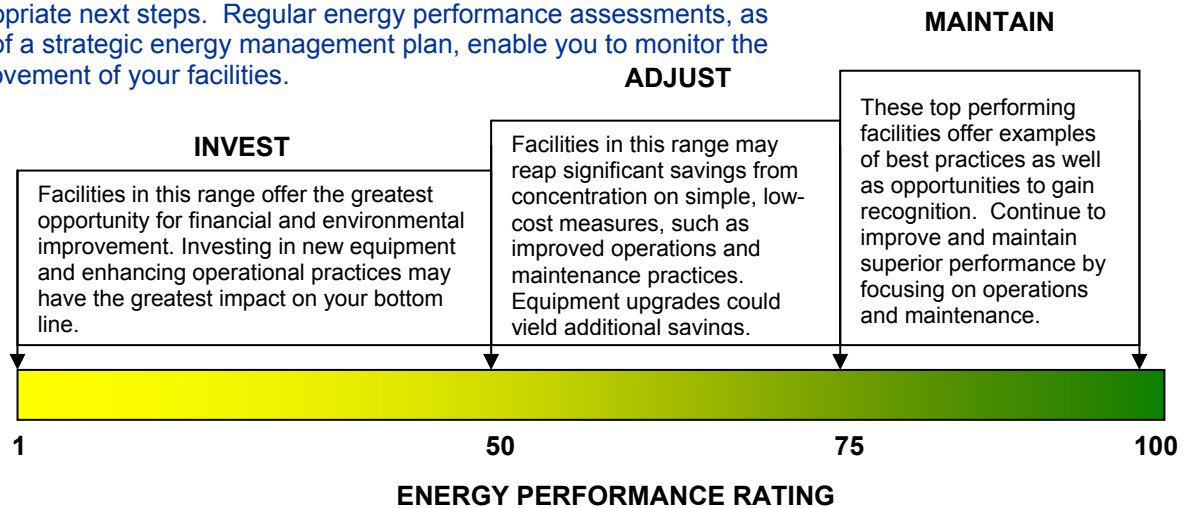
DATA NEEDED

- Address, including zip code
- Gross square footage and space type(s)
- Weekly operating hours
- Occupant density
- Number of PCs
- 12 consecutive months of overlapping energy data

WWW.ENERGYSTAR.GOV/BENCHMARK

RATING INTERPRETATION

Once you have established an energy performance baseline for all facilities in your portfolio, you are ready to set performance goals and create an action plan. The guide below can help you determine the appropriate next steps. Regular energy performance assessments, as part of a strategic energy management plan, enable you to monitor the improvement of your facilities.



HELPFUL HINTS

- Enter **12 consecutive** months of energy data. In order to generate a rating, the time period must be the same (**overlapping**) for all meters and fuel types.
- Be sure to **review the energy data** you have entered for lapses in time. Where gaps occur, the tool may not be able to generate a rating. If no energy was used for a particular time period, enter a zero for that period.
- When entering quantitative data, **do not include commas or other punctuation** in either energy consumption or cost. The tool will do this for you.
- When **updating** a facility's energy use, enter the appropriate meter name and energy use data, while selecting the correct units of measurement.
- Be sure to **include the correct zip code**, as the tool normalizes for weather variations.
- **Change your password and username at any time** by selecting "Account Information" at the top of the screen.
- **Coordinate with your energy service provider** or utility to help assess the performance of your office space and implement upgrades.

NEW FEATURES

- **Consolidate accounts.** Simplify organization-wide energy management by merging multiple accounts into one. From the Facility Summary page, select "Transfer" under "Sharing Data."
- **Share facilities across accounts.** From the Facility Summary page, follow the links under the 'Sharing Data' section to provide another user with access to your building.
- **Simplify energy management** across your portfolio by grouping facilities. Determine appropriate groups (e.g. region, facility type, energy manager) and subgroups. Click "My Portfolio" then "Create Group."
- **Receive "alerts."** These messages identify potential issues related to how energy or space use data was entered (e.g. old data, missing information).
- **Download data into Excel.** Transfer building summary information or energy data into Excel using links in "My Portfolio" or "Energy Meter" view, respectively.
- **Set energy performance baseline and targets.** Establish a baseline and target by either defining a target rating or a target percent reduction.

NEED FURTHER ASSISTANCE?

Select "Help" on the Portfolio Manager's navigation bar at the top of the screen or Email ENERGY STAR support at energystarbuildings@epa.gov.