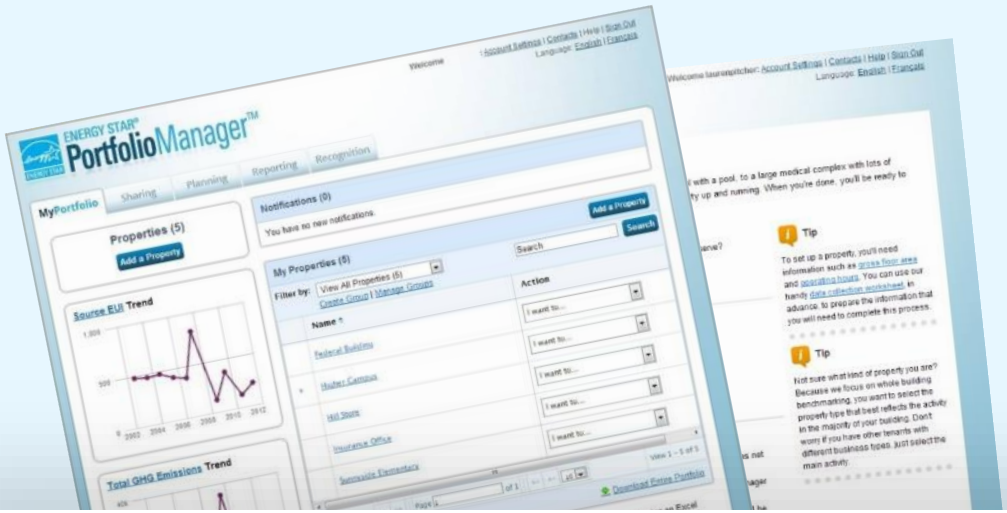
Portfolio Manager® 101



ENERGY STAR®

PortfolioManager®

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

ENERGY STAR®
PortfolioManager®
for all commercial spaces

Understand whole building use and cost for

1 **Energy** 2 **Water** 3 **Waste & Materials**

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

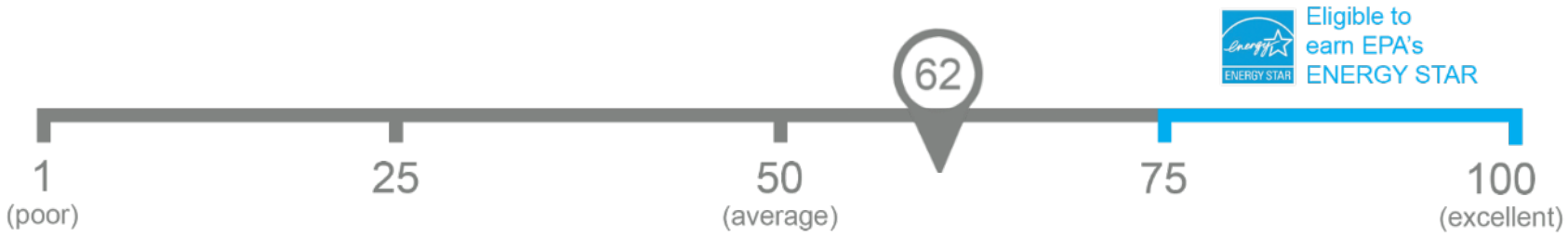
- More than 300 metrics for all bldg. types
- Energy (source, site, weather normalized etc.)
- ENERGY STAR 1-to-100 score (for many building types)
- Greenhouse gas emissions (indirect, direct, total, avoided)
- Green power
- Water (indoor, outdoor by type)
- Waste & materials (trash, recycling, compost 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:	✓	✓	✓
• Compare current use to baseline overtime.	✓	✓	✓
• Compare median of national sample of similar buildings to baseline.	✓		
• 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

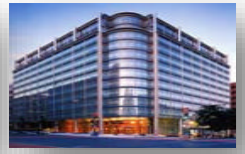
Distribution Centers

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

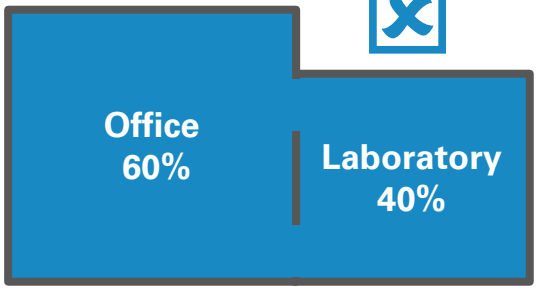
Worship Facilities

ENERGY STAR Score for Multi-Use Properties

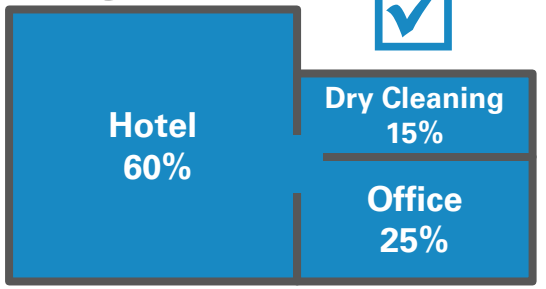
Eligible for Score ☑ Ineligible for Score ☒

Bldg. 1 ☑

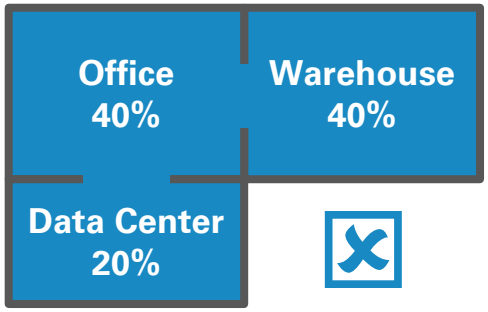
Bldg. 2 ☒



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

Navigate Portfolio Manager

4 portfolio level tabs

7 property level tabs

Intuitive navigation – multiple ways to get to the same place

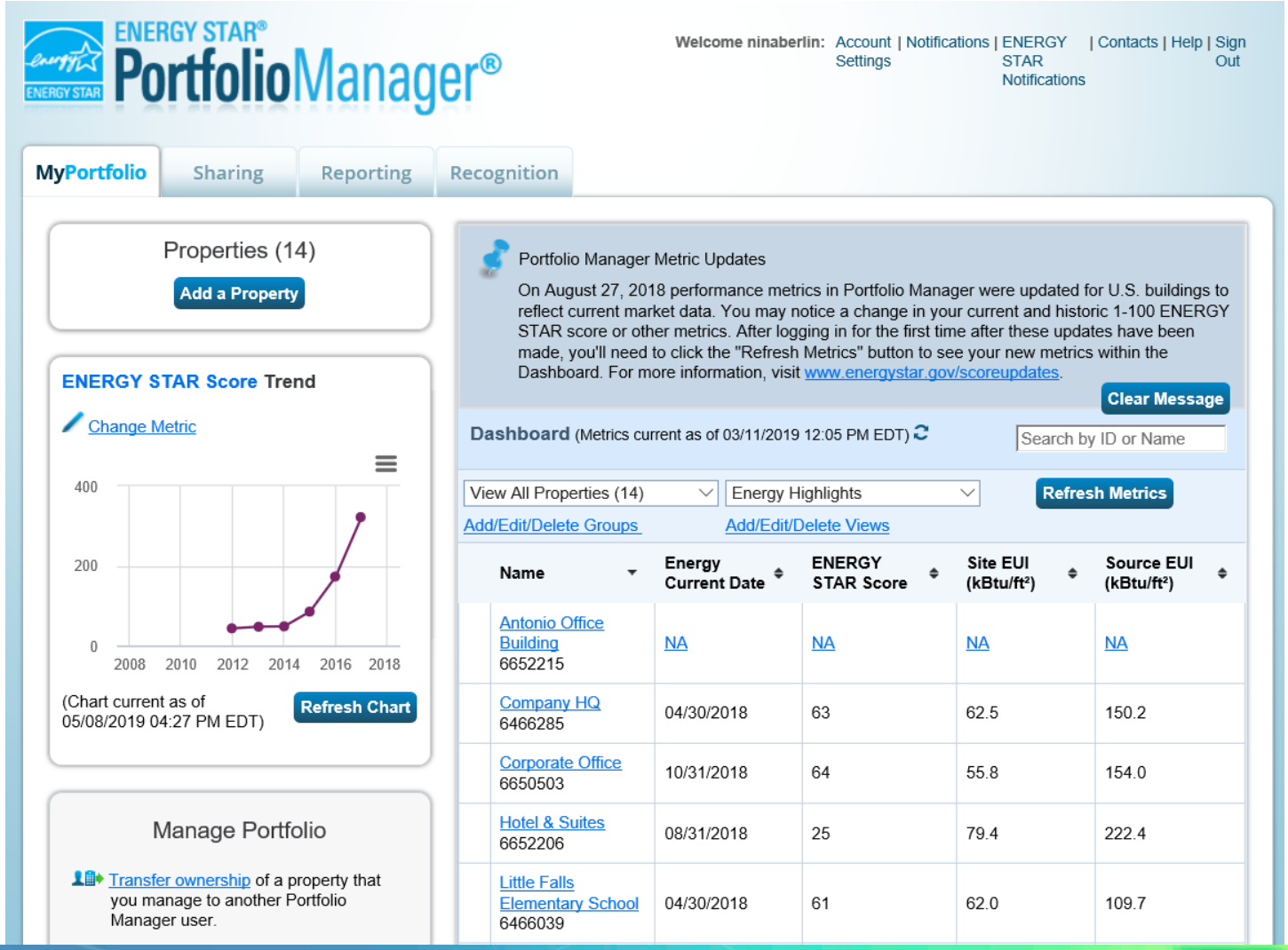
Energystar.gov/portfoliomanager

Create a username and password

Log in

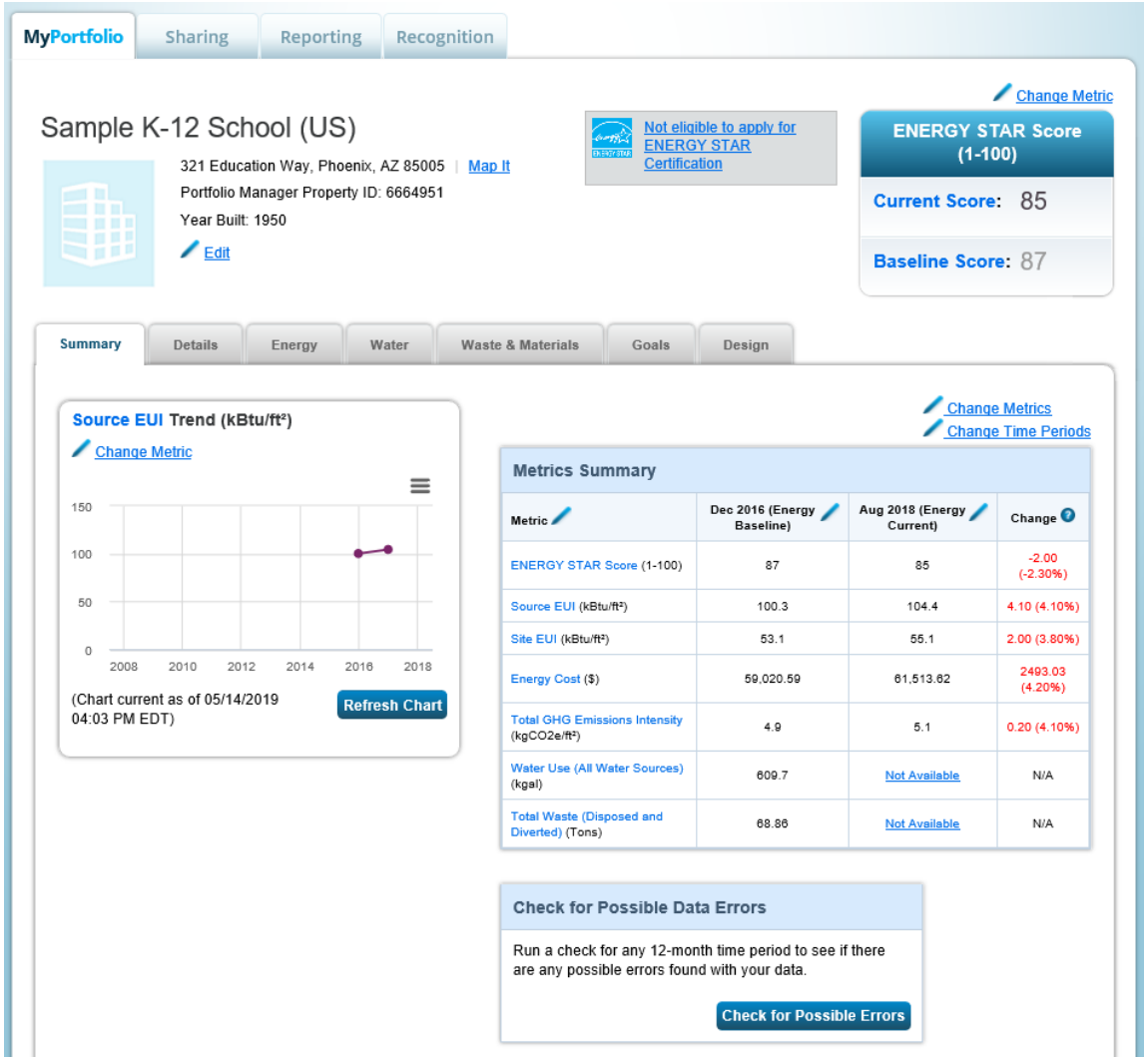
Navigate Portfolio Manager

Portfolio level view



Navigate Portfolio Manager

Property level view



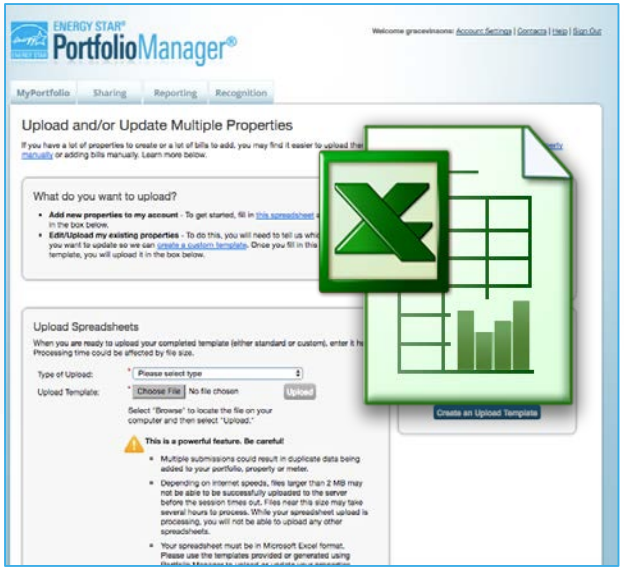
How To

- 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

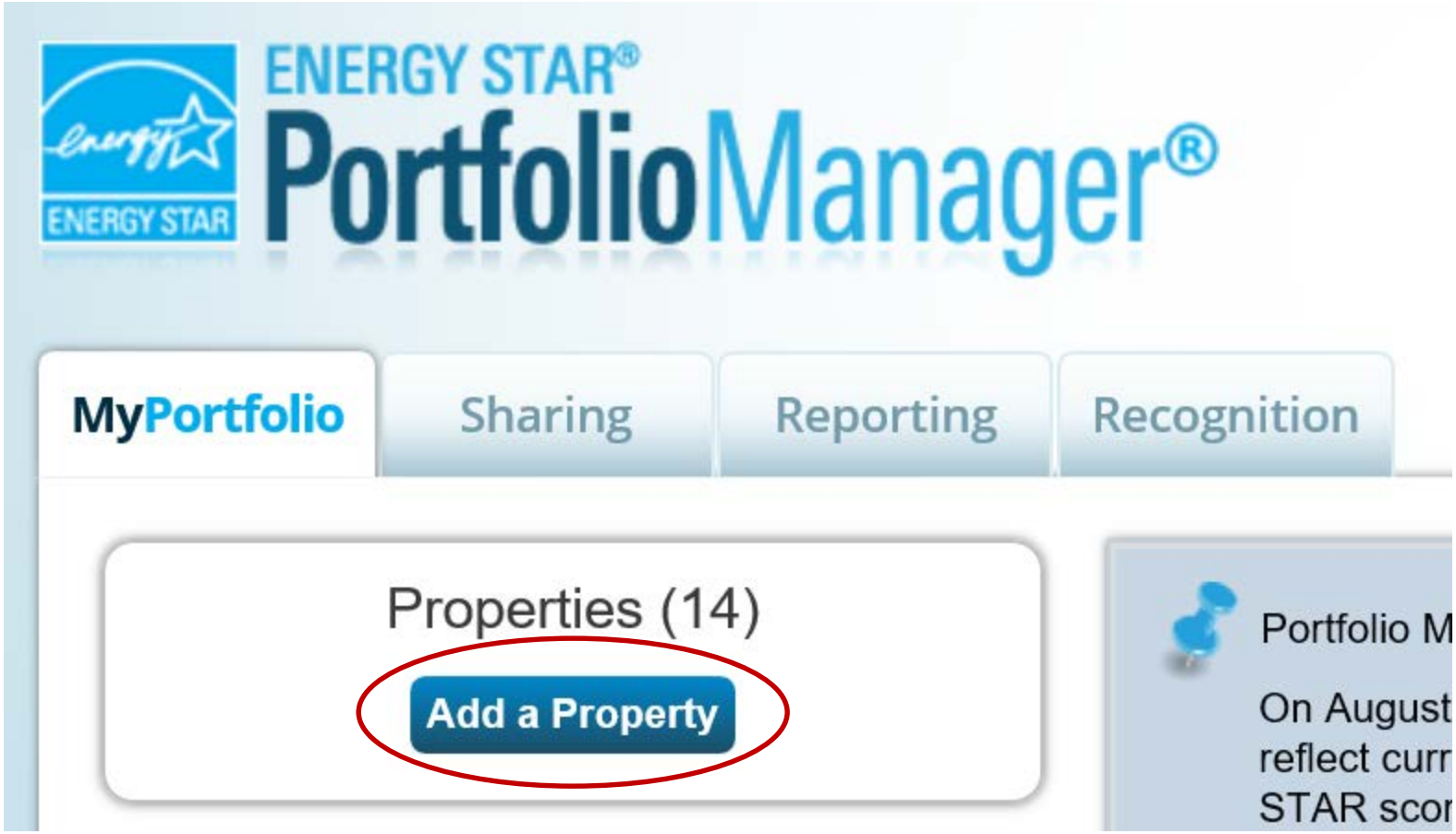
Spreadsheet upload



Web services

Choose the best data management method.

Get Data In: Manually



Get Data In: Spreadsheet Upload

ENERGY STAR® Portfolio Manager®

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: * Please select type

Upload Template: * Browse... Upload

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.

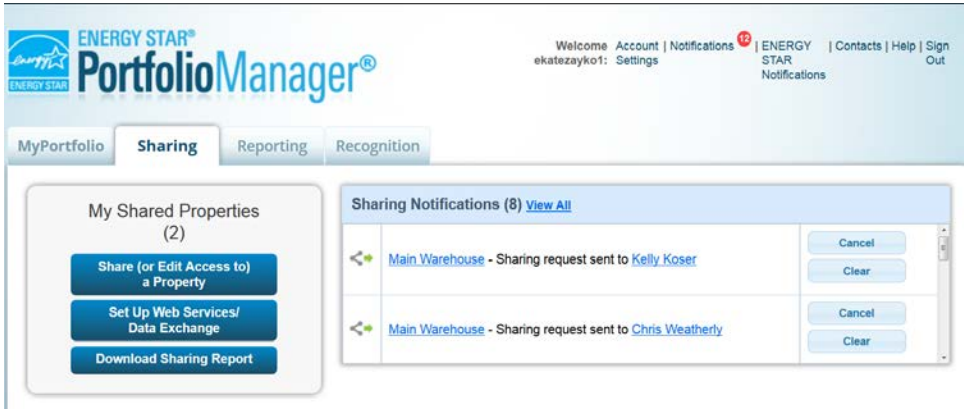
Edit and Manage Information

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.

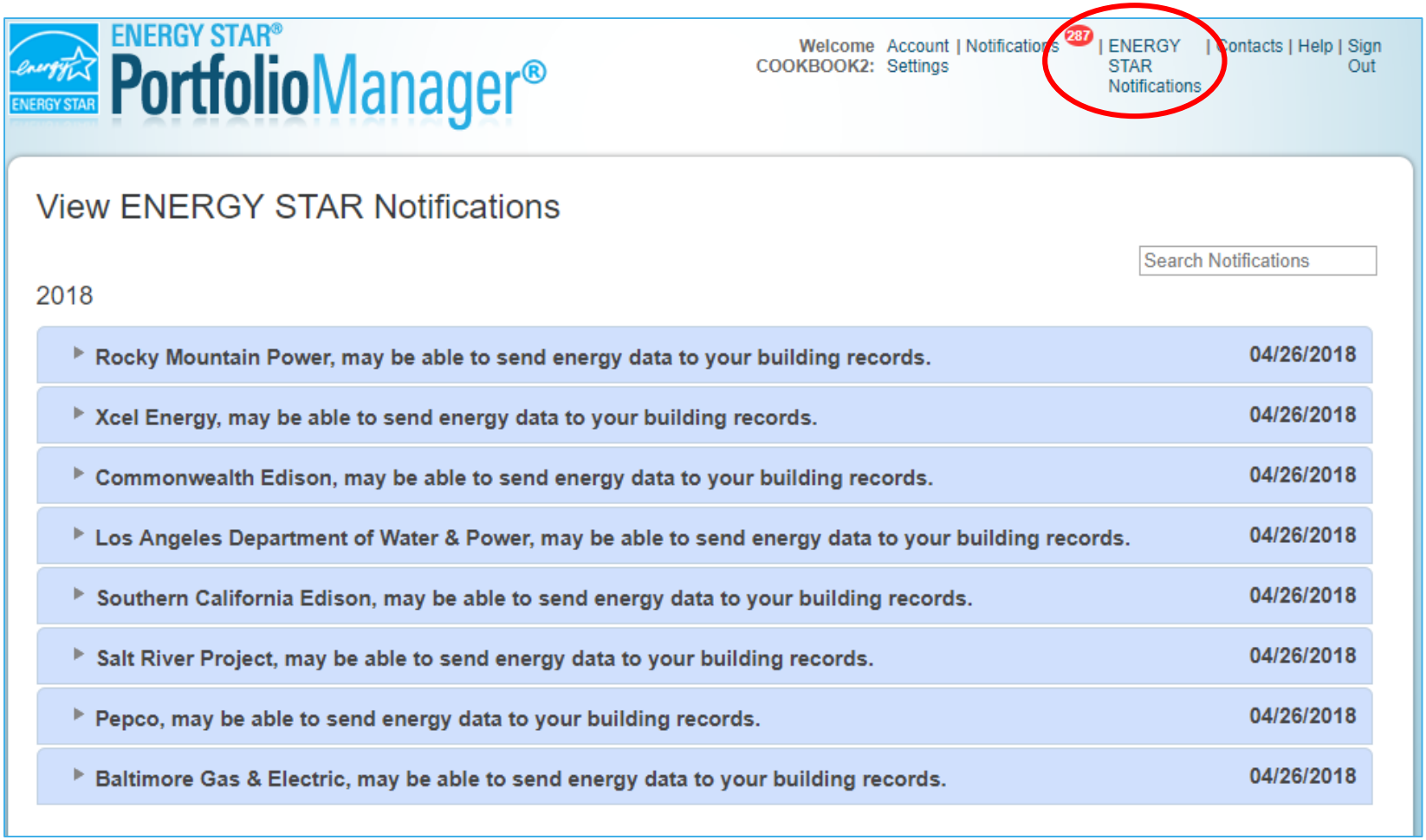
Create an Upload Template

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

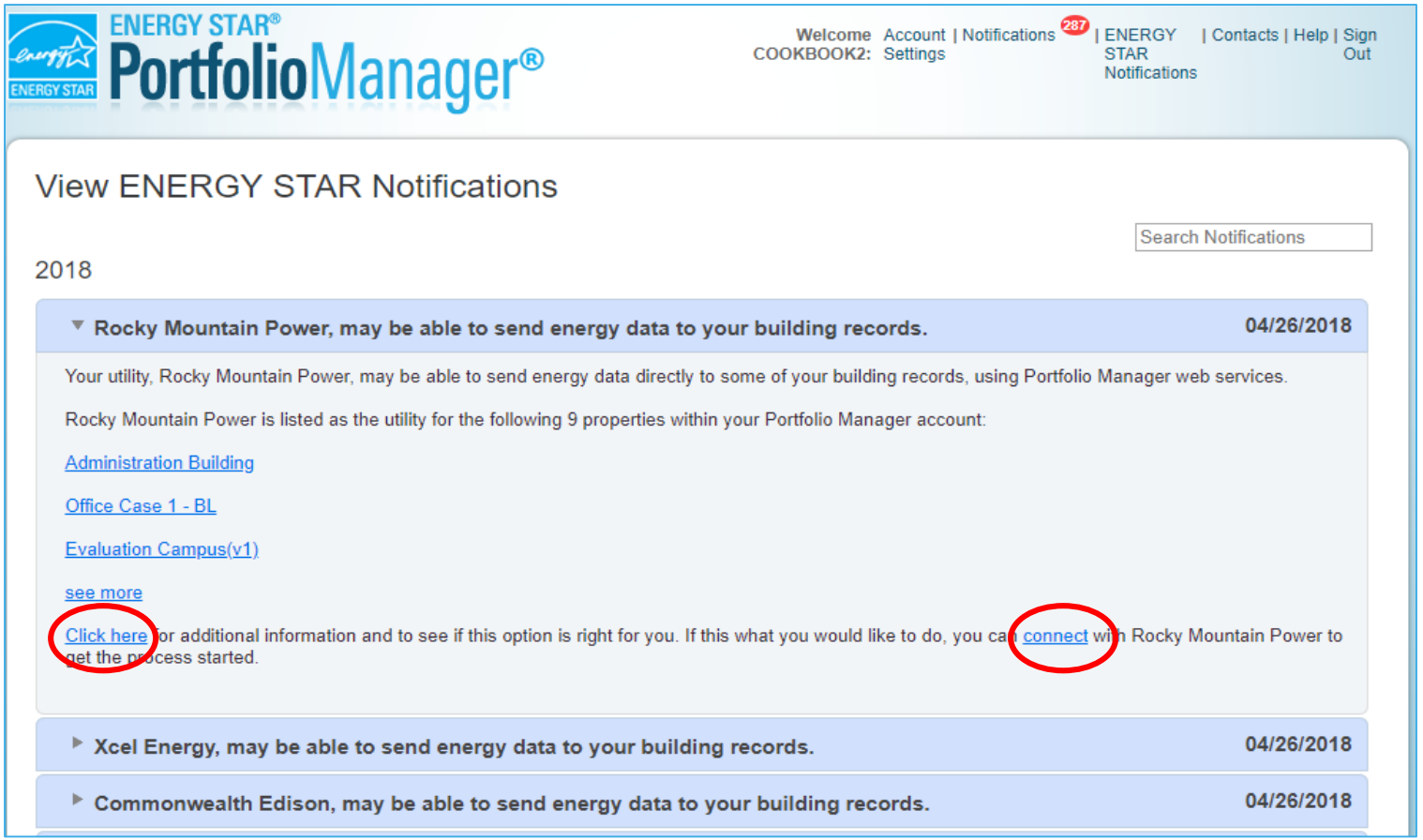


Get Data In: ENERGY STAR Web Services



- Users will have an ENERGY STAR Notification when web services are available for a property

Get Data In: ENERGY STAR Web Services



- 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
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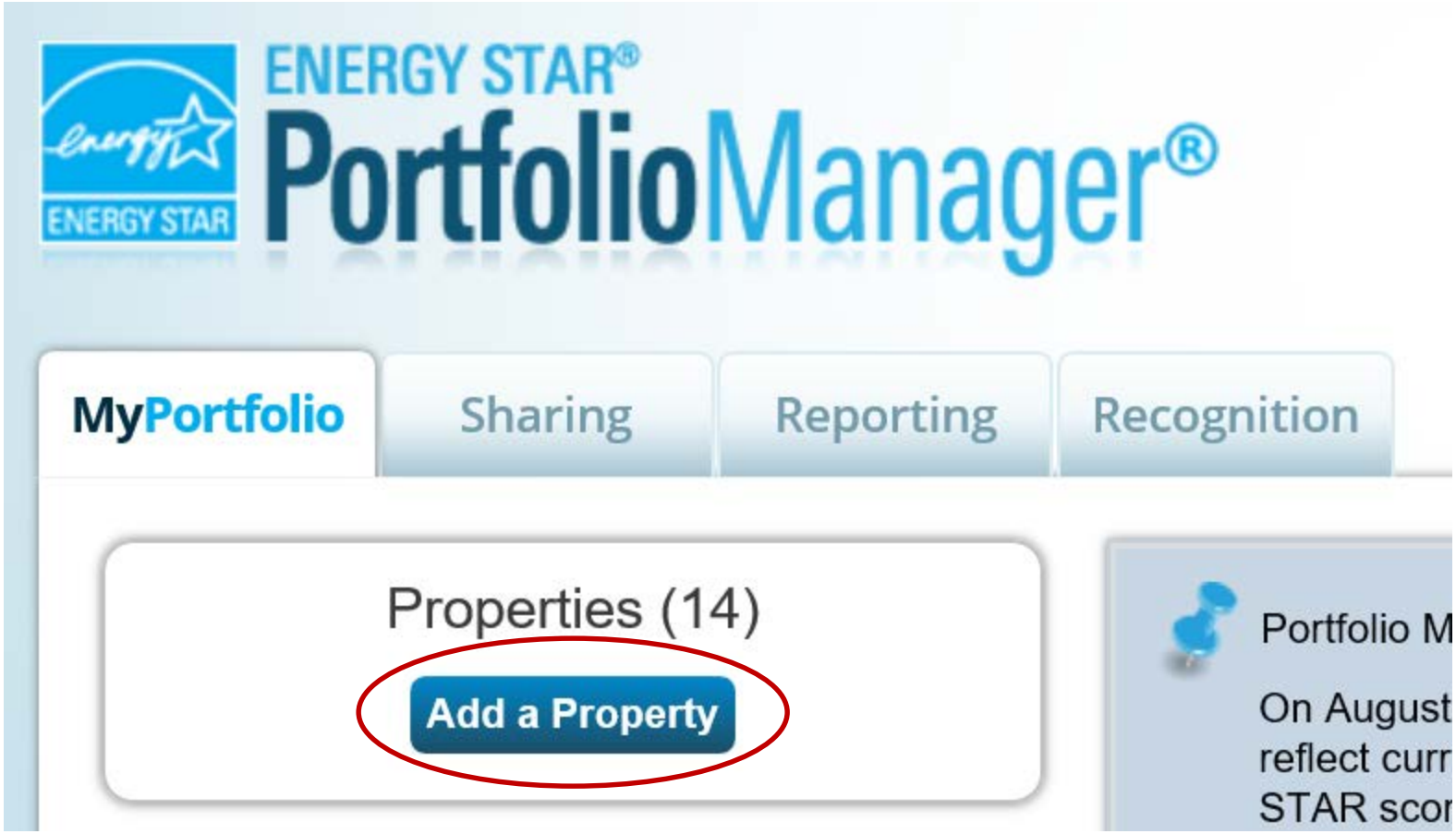
    d. Four or more

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

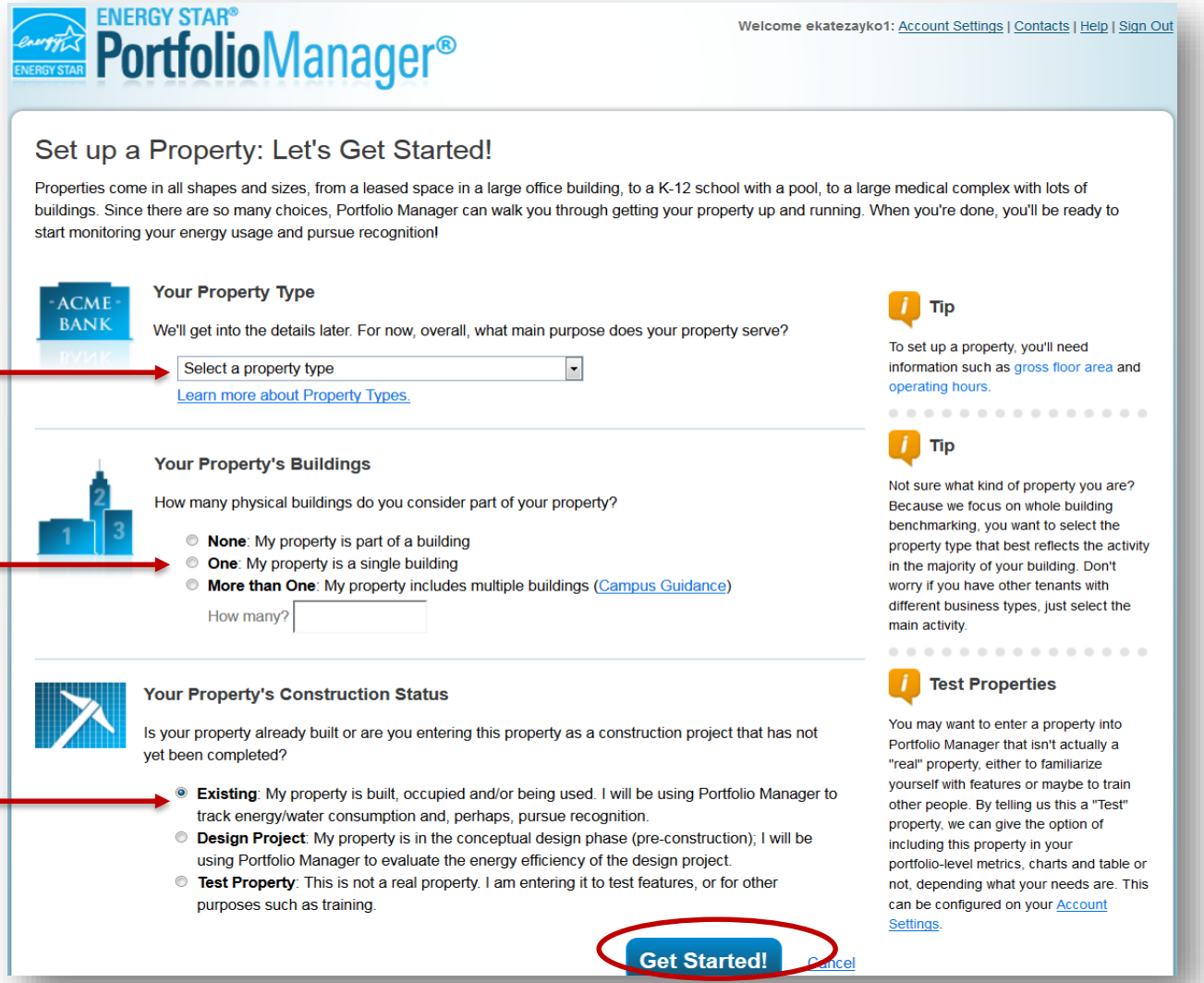


Add a Property: Existing Property

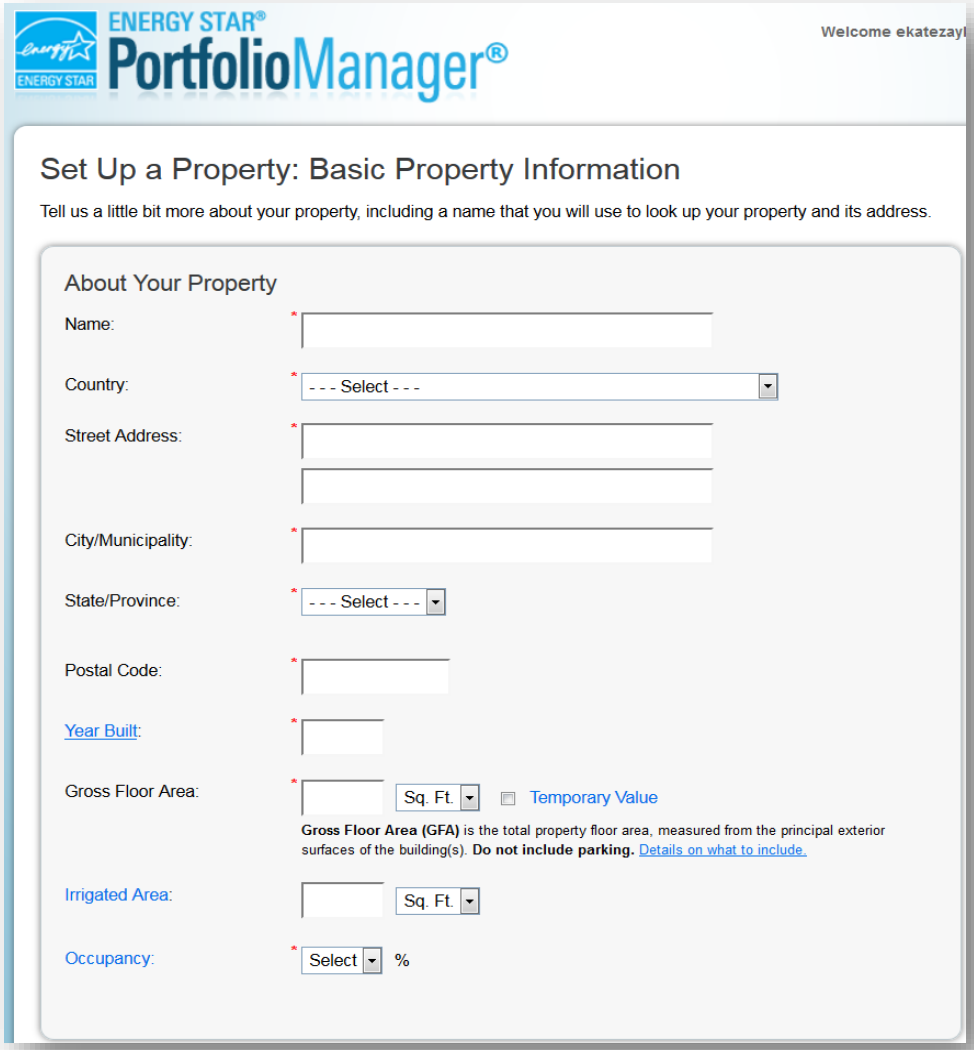
Select Property Type

Select number of buildings

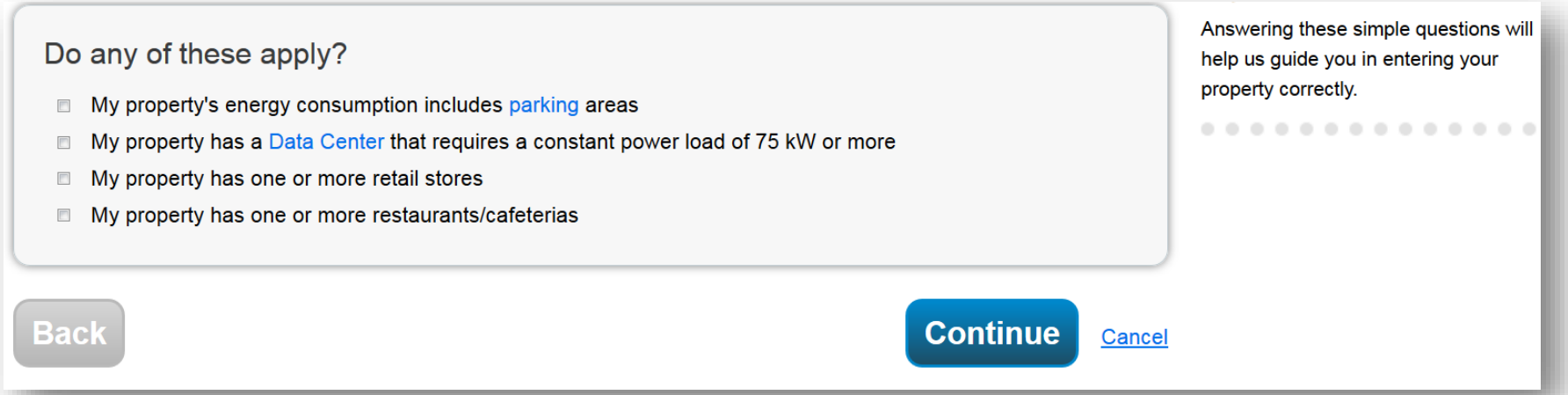
Select construction status



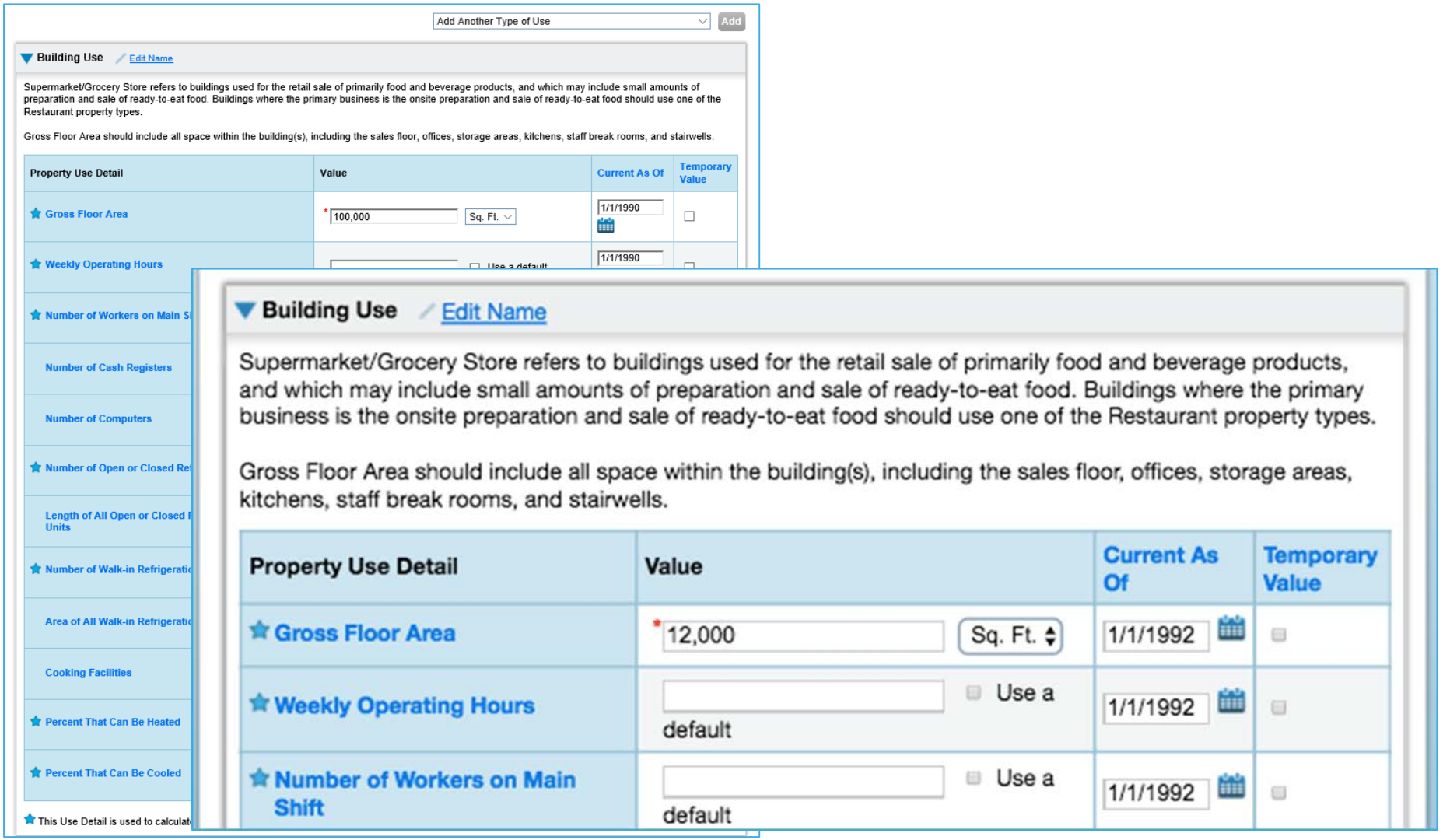
Basic Property Information



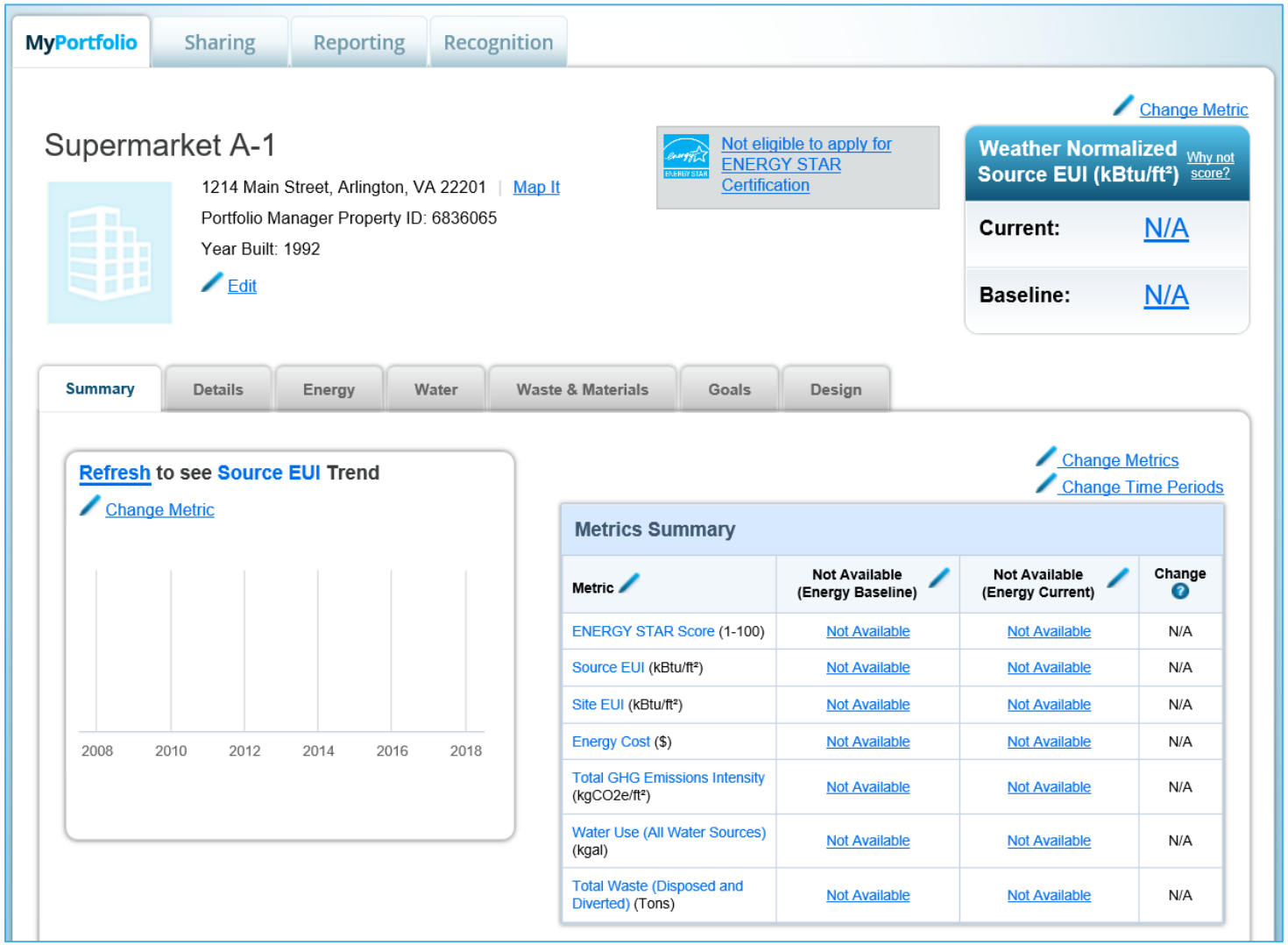
Check the statements that apply



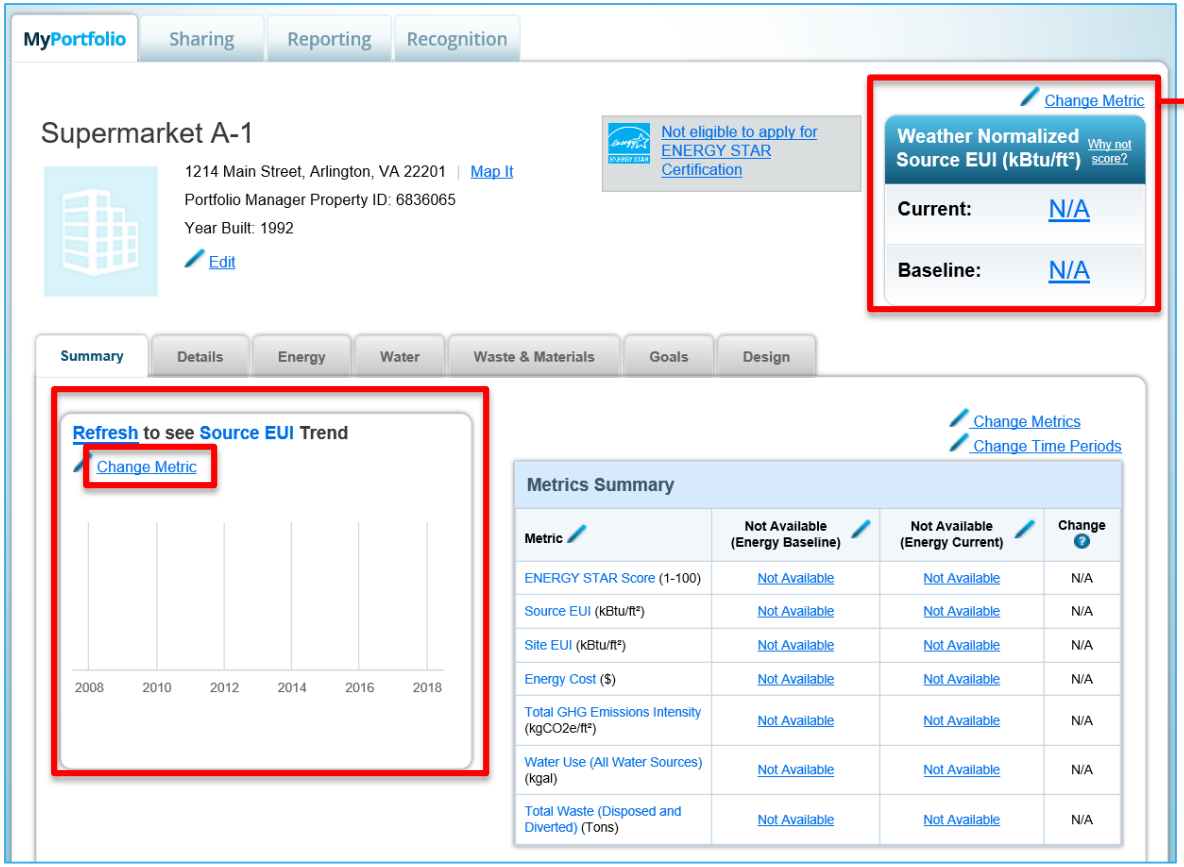
Enter Values for Property Use Details

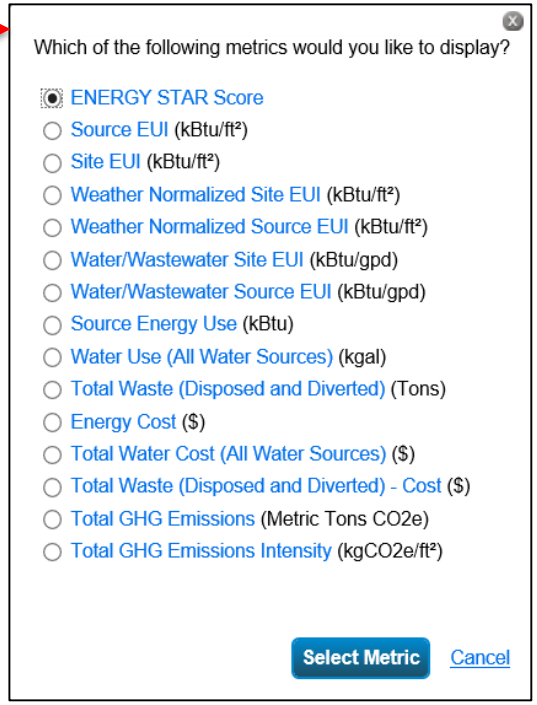


Property Summary Tab



Property Summary Tab – Customized Metric Displays





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.

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?

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.

Get Started! Cancel

Tip

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

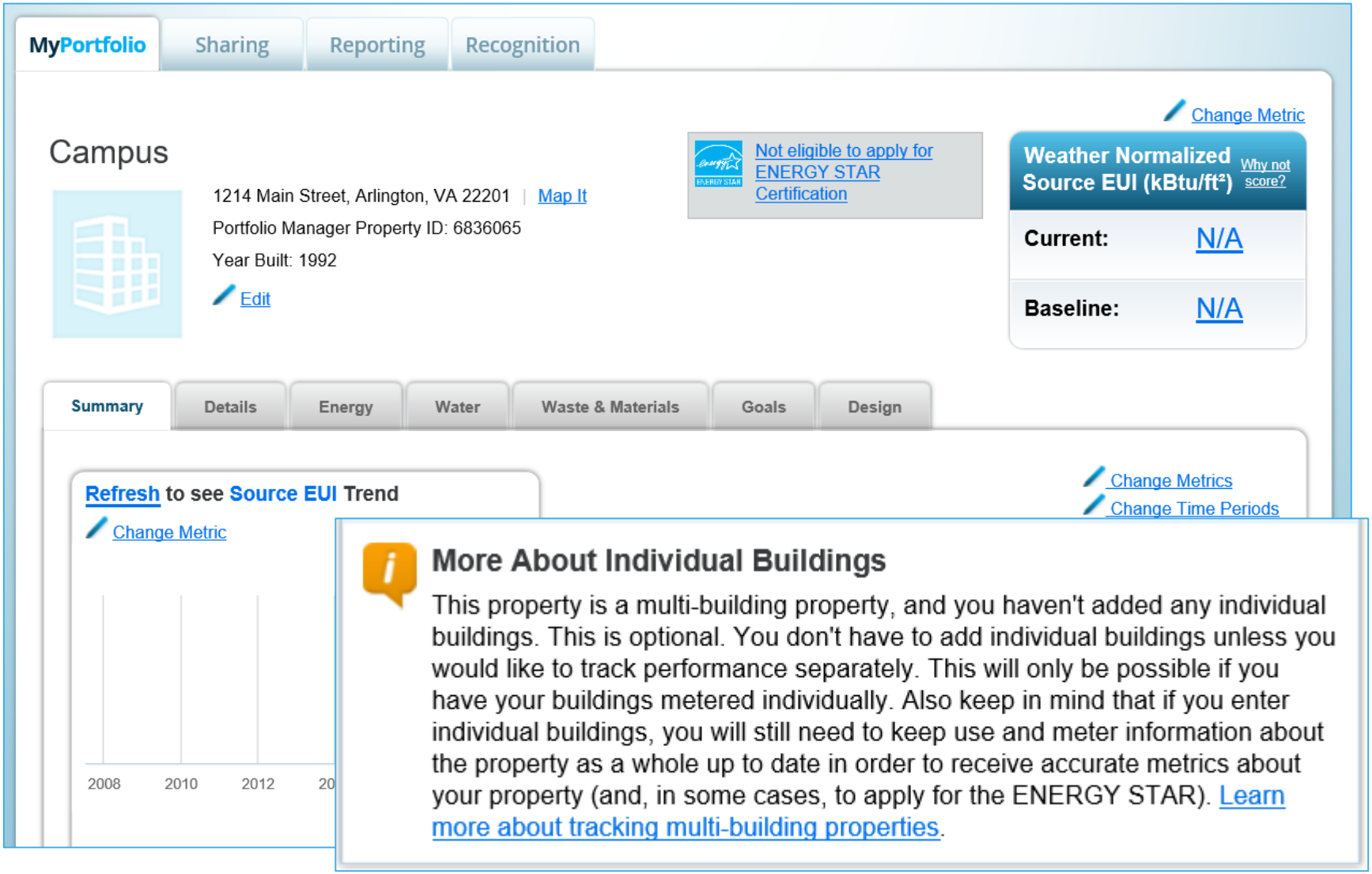
Tip

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.

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.

Campus Configurations



How To

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- Add a property and enter its use details
- Enter energy, water, and waste & materials data
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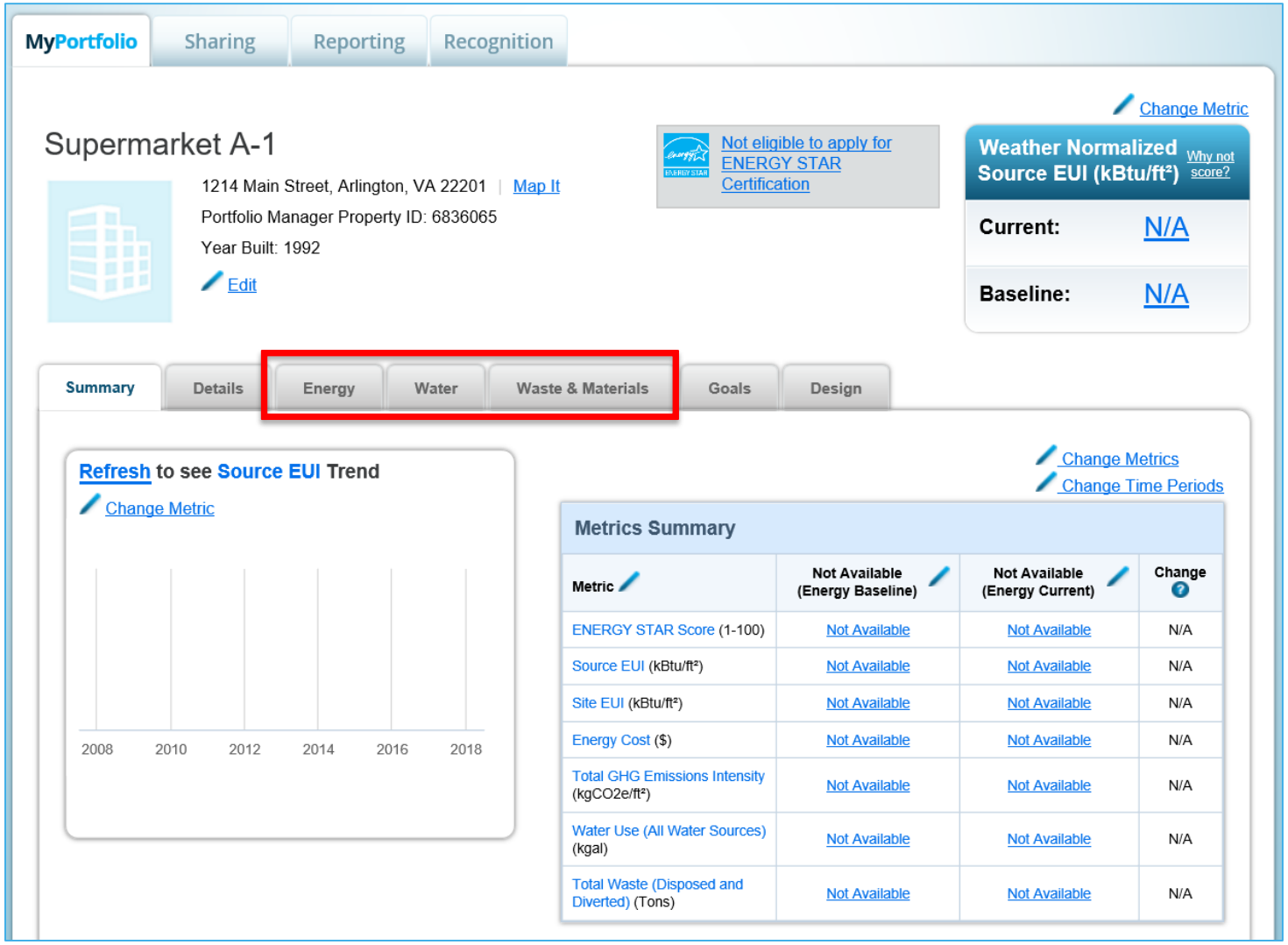
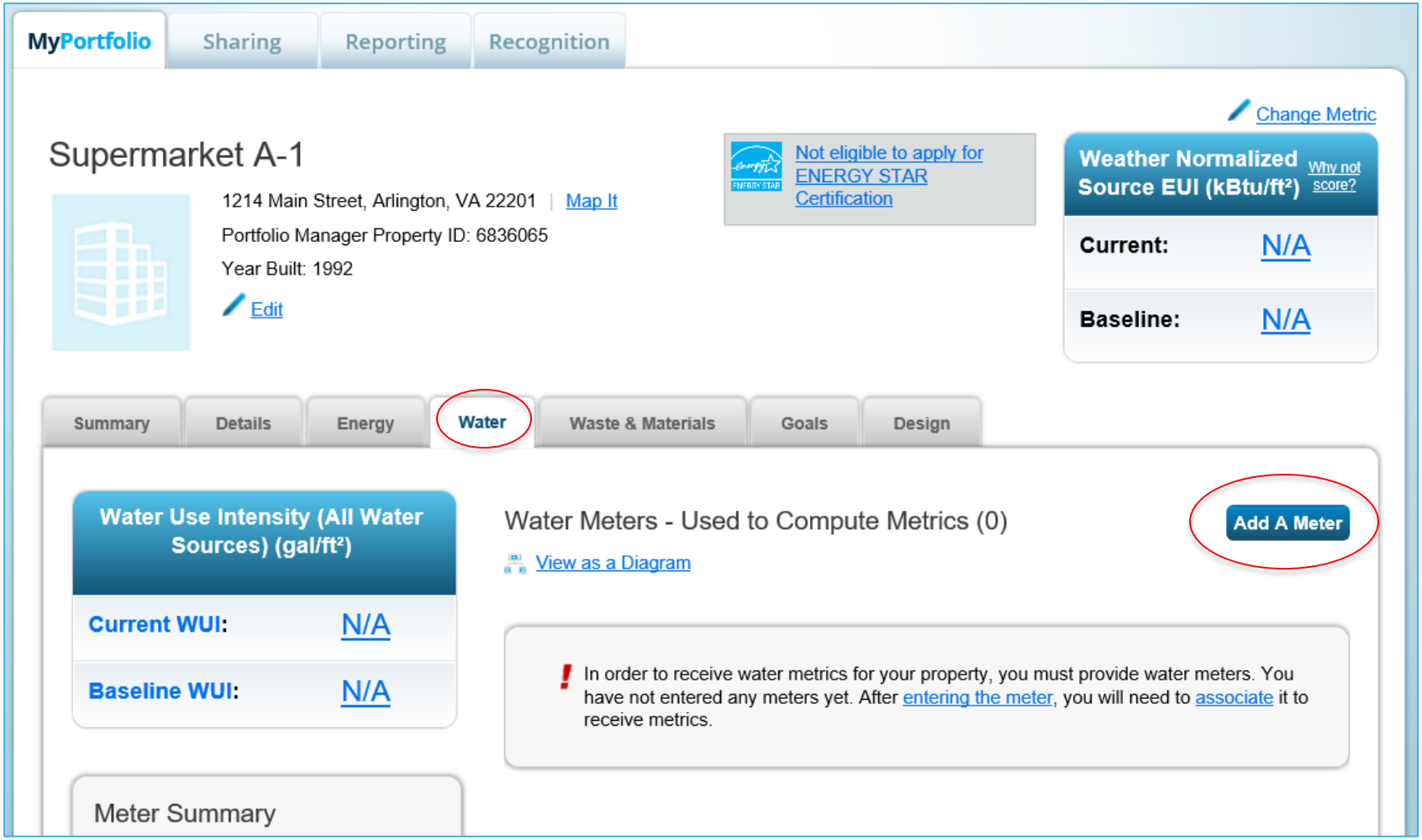
Meters Tabs


MyPortfolio
Sharing
Reporting
Recognition
Change Metric
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
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
2008
2010
2012
2014
2016
2018
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/ft²) Not Available Not Available N/A
Site EUI (kBtu/ft²) Not Available Not Available N/A
Energy Cost ($) Not Available Not Available N/A
Total GHG Emissions Intensity (kgCO2e/ft²) 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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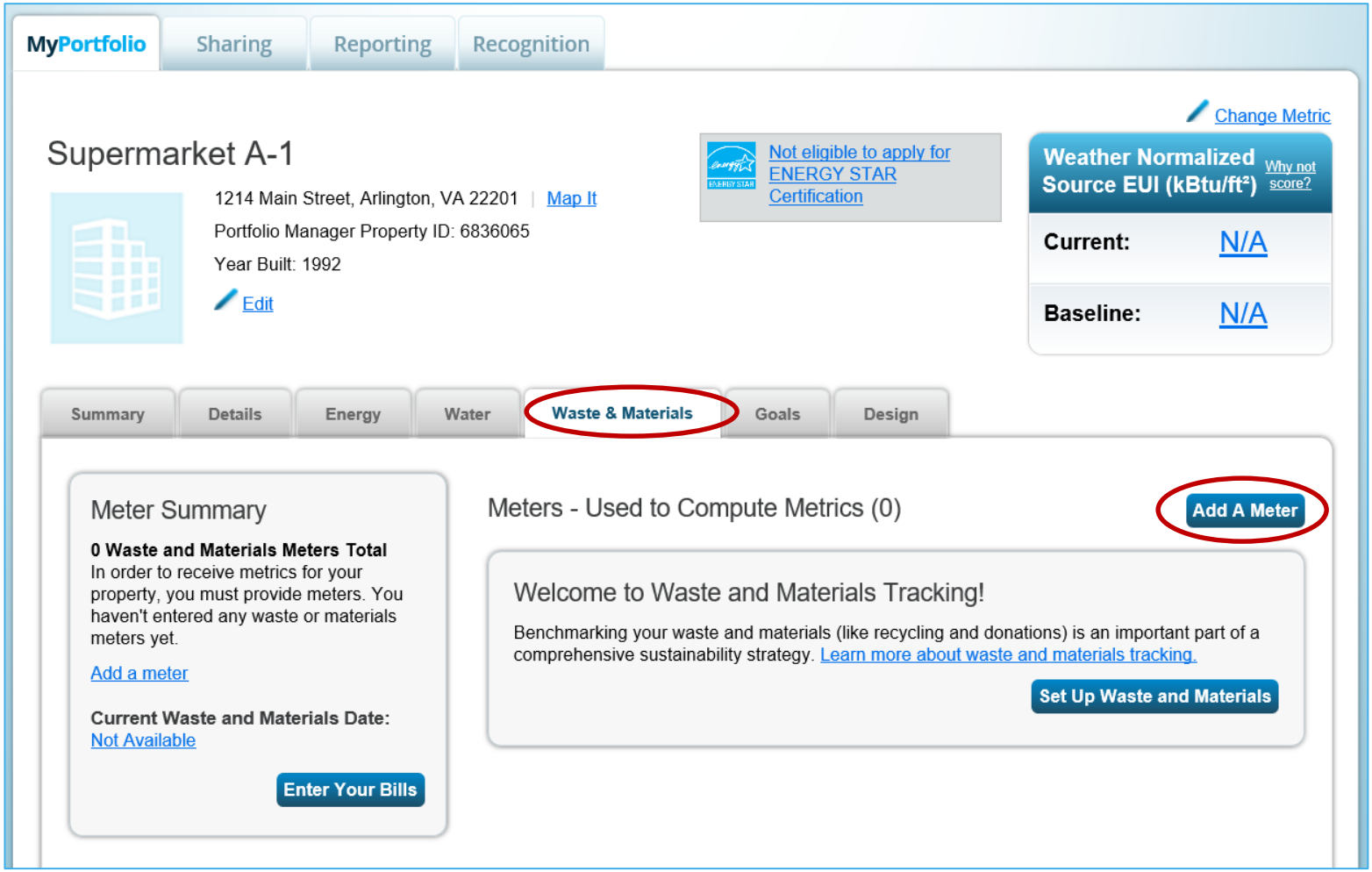
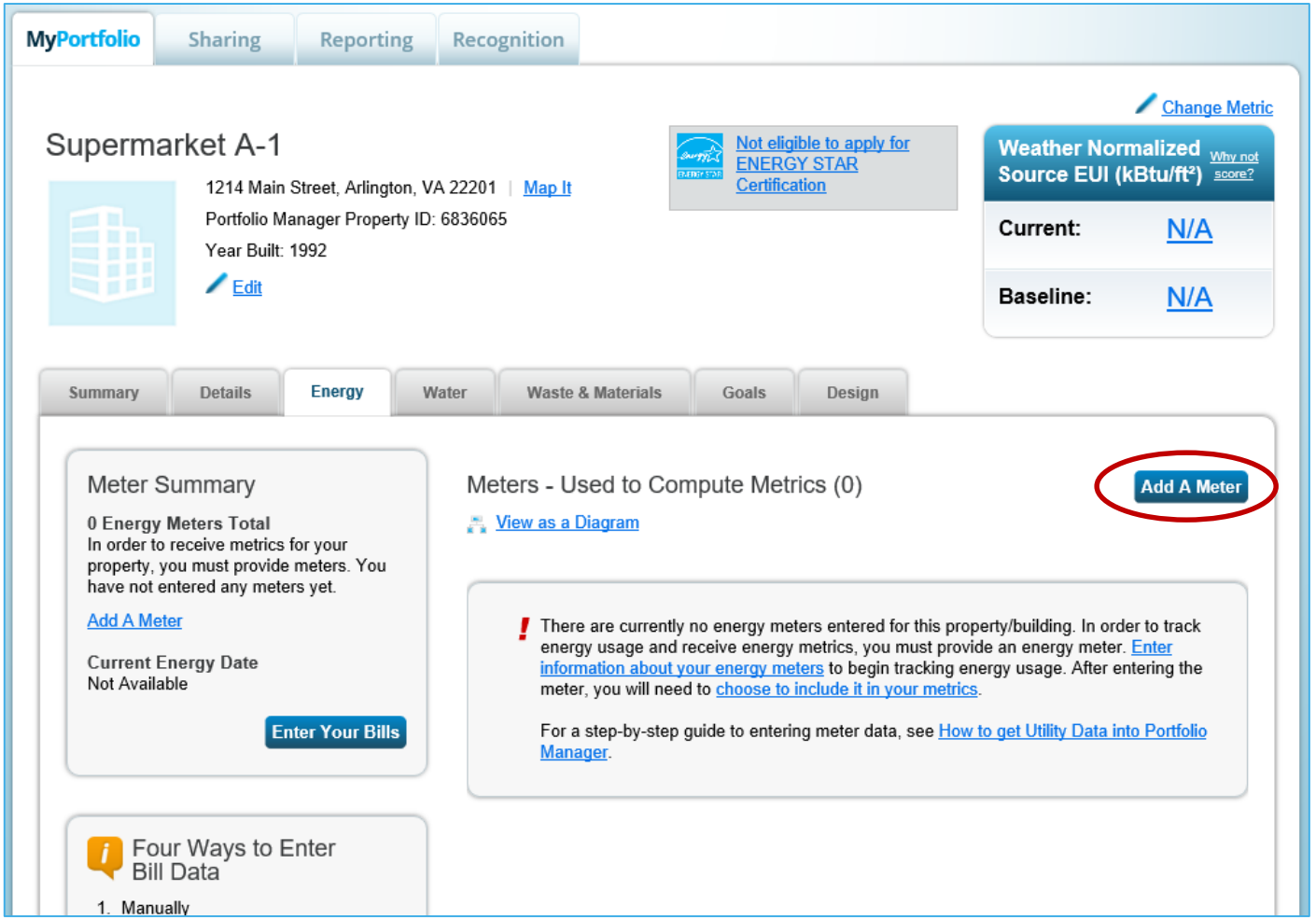
Weather Normalized Source EUI (kBtu/ft²)
Why not score?
Current: N/A
Baseline: N/A
Summary
Details
Energy
Water
Waste & Materials
Goals
Design
Water Use Intensity (All Water Sources) (gal/ft²)
Current WUI: N/A
Baseline WUI: N/A
Water Meters - Used to Compute Metrics (0)
View as a Diagram
Add A Meter
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

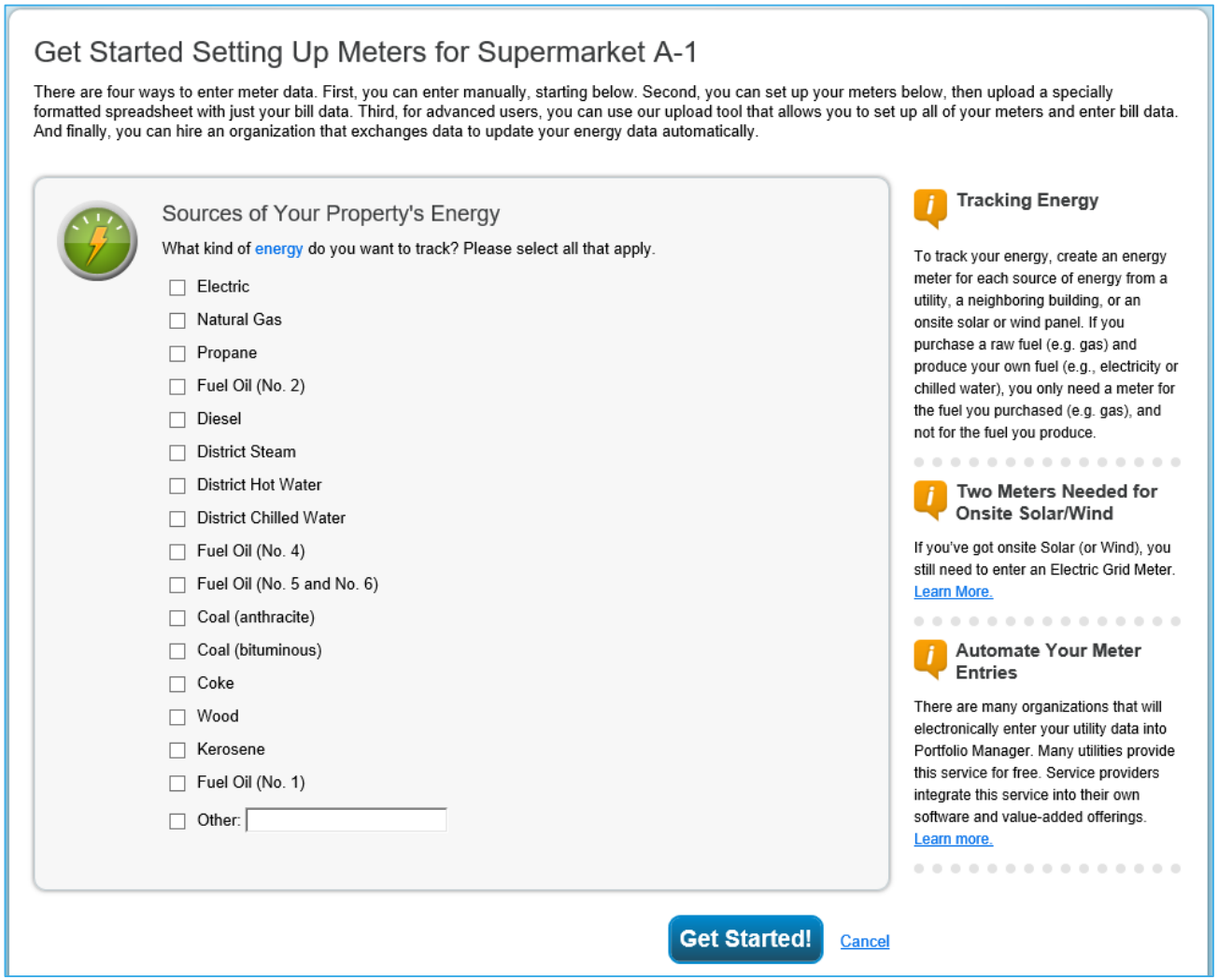
Waste & Materials Tab



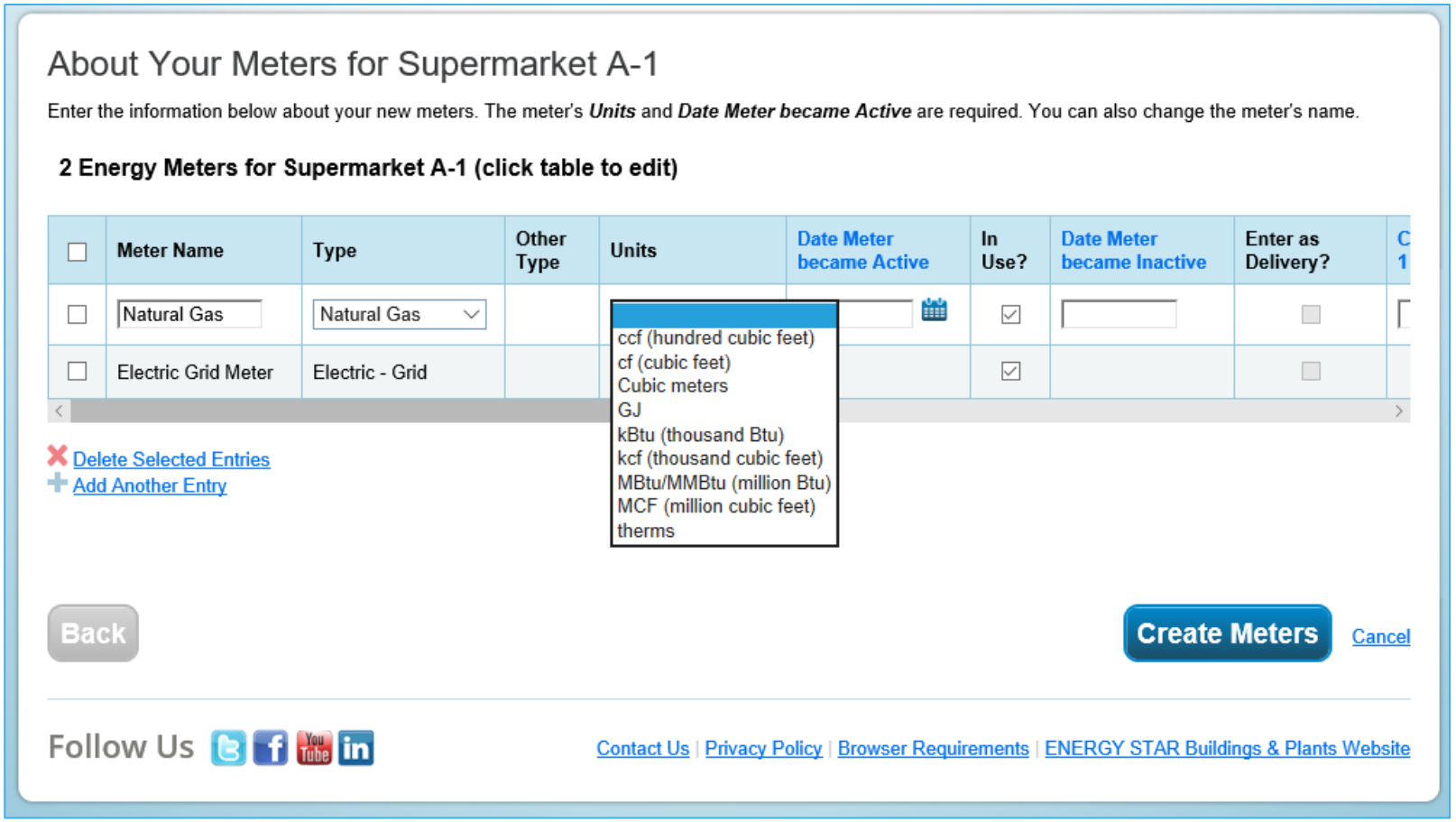
Energy Meter Tab



Enter Additional Information

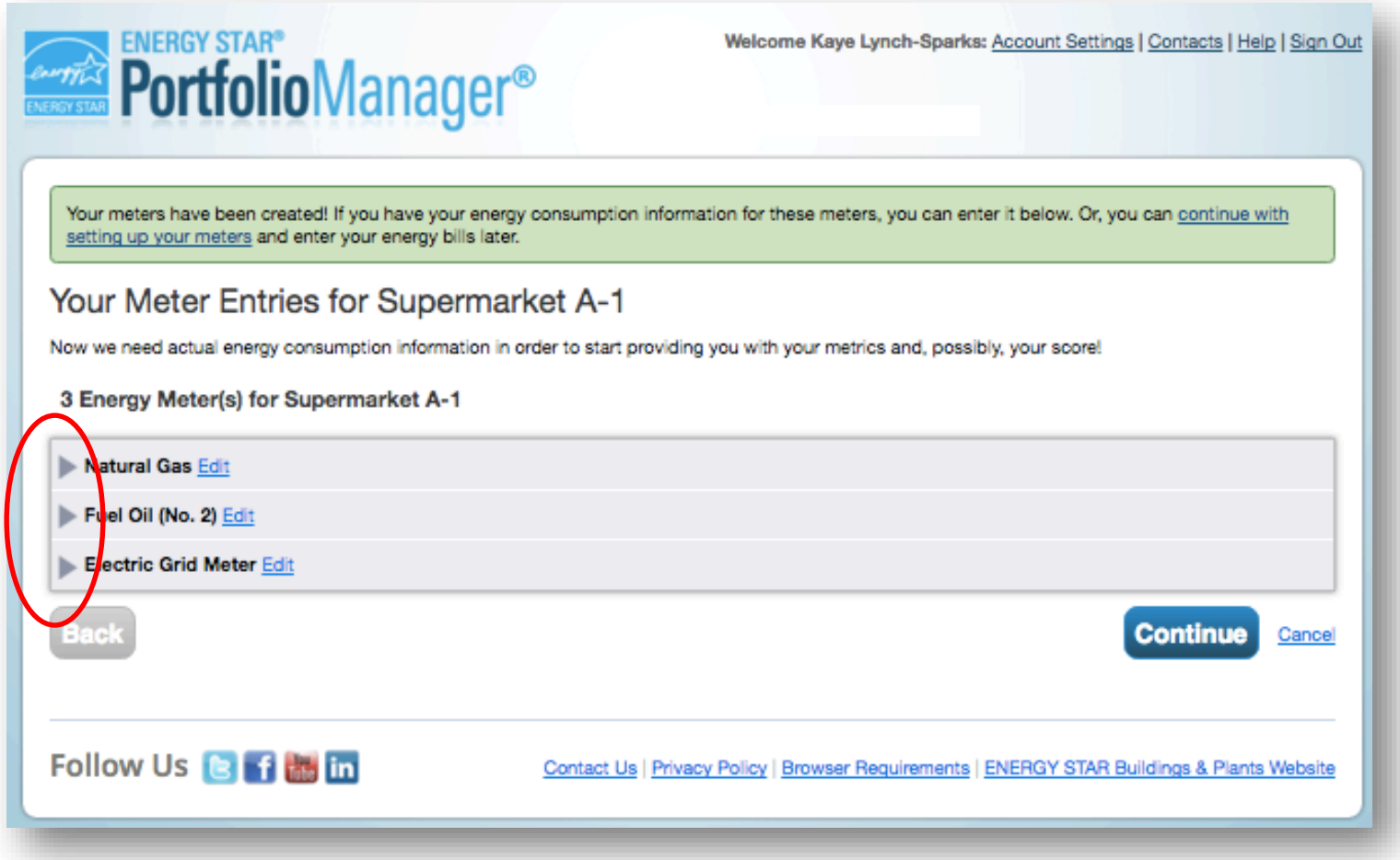


About Your Meters



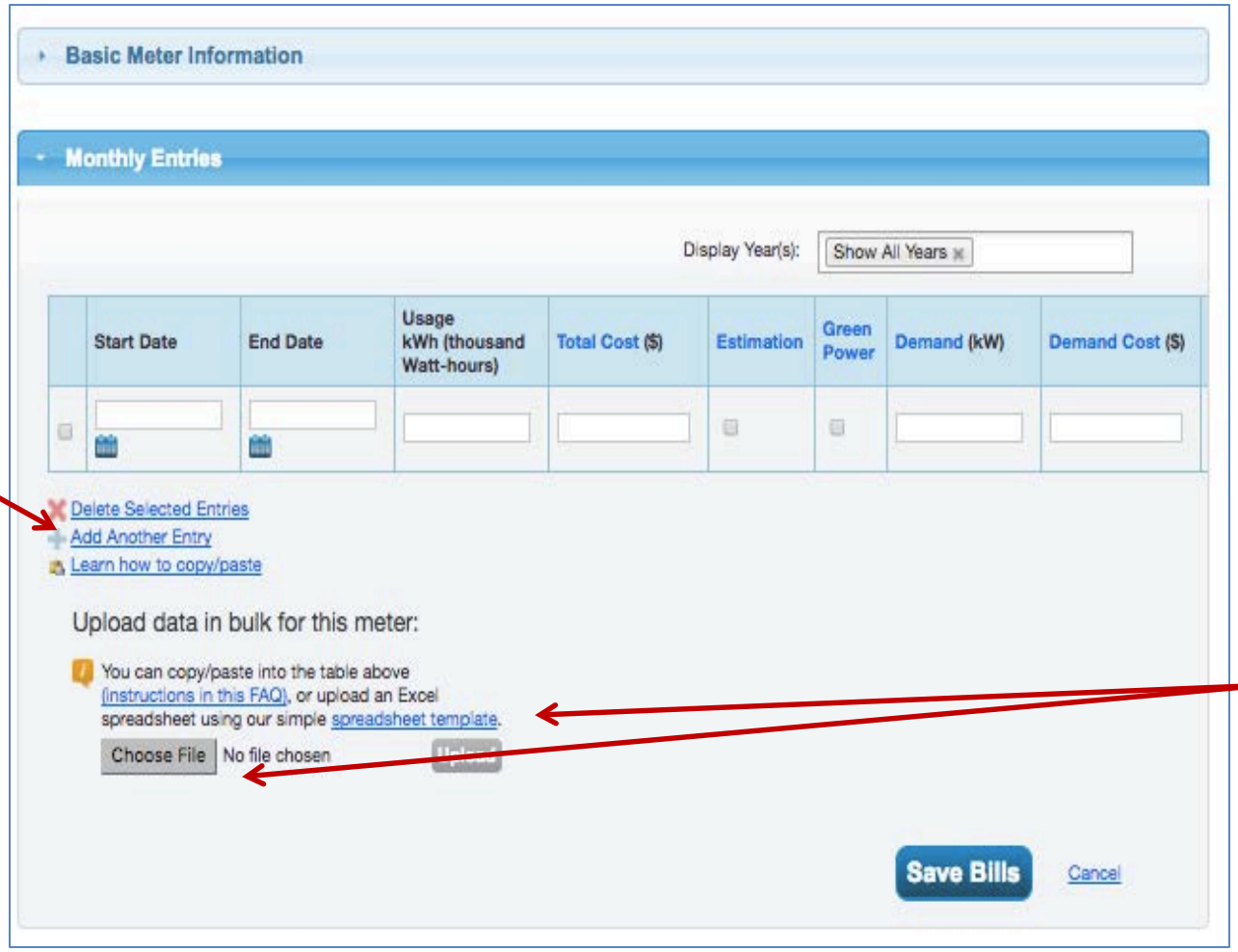
Add Energy Consumption Information

Expand meter by clicking arrow



Add Meter Entries and Fill in Data

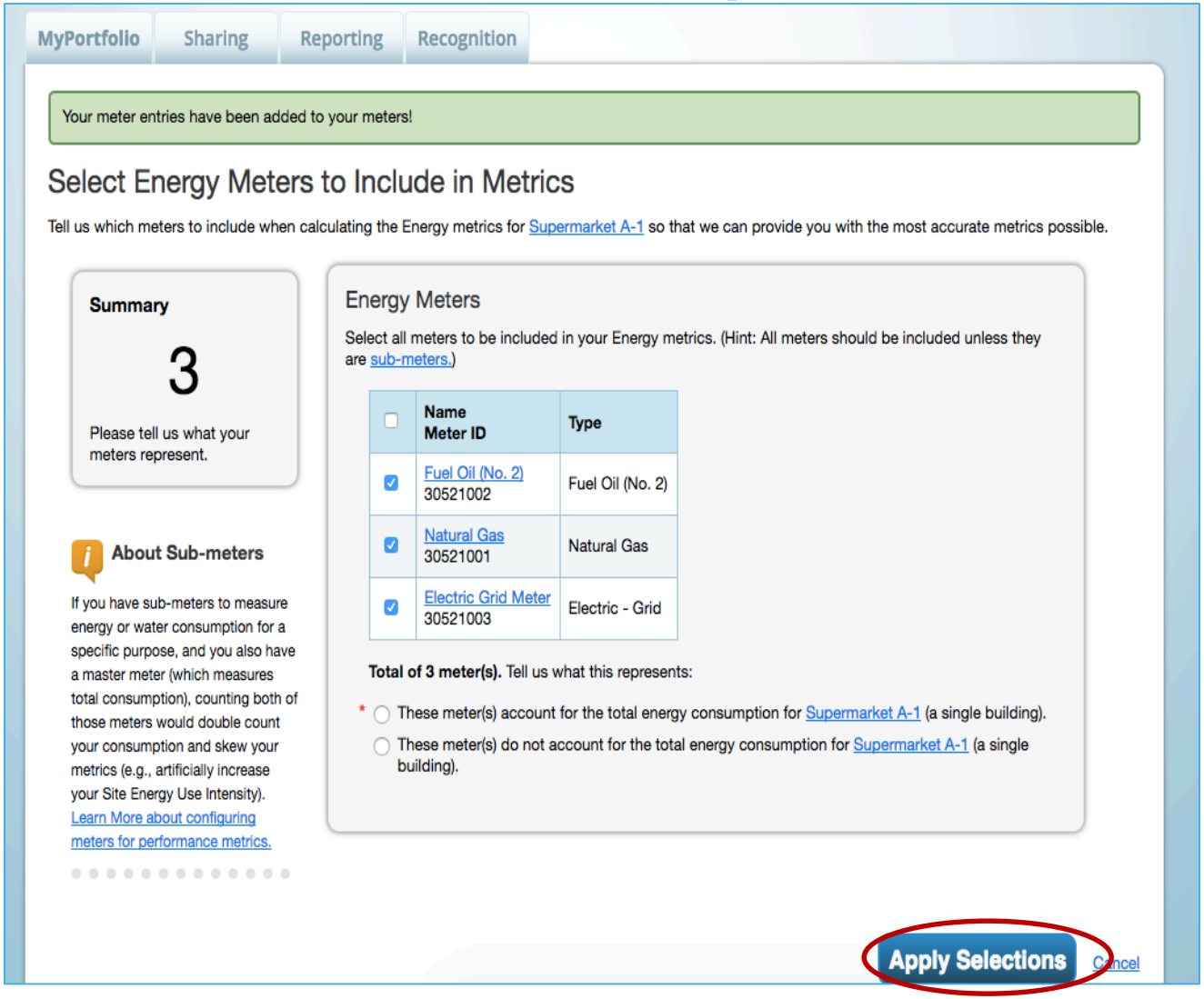
Add another entry



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

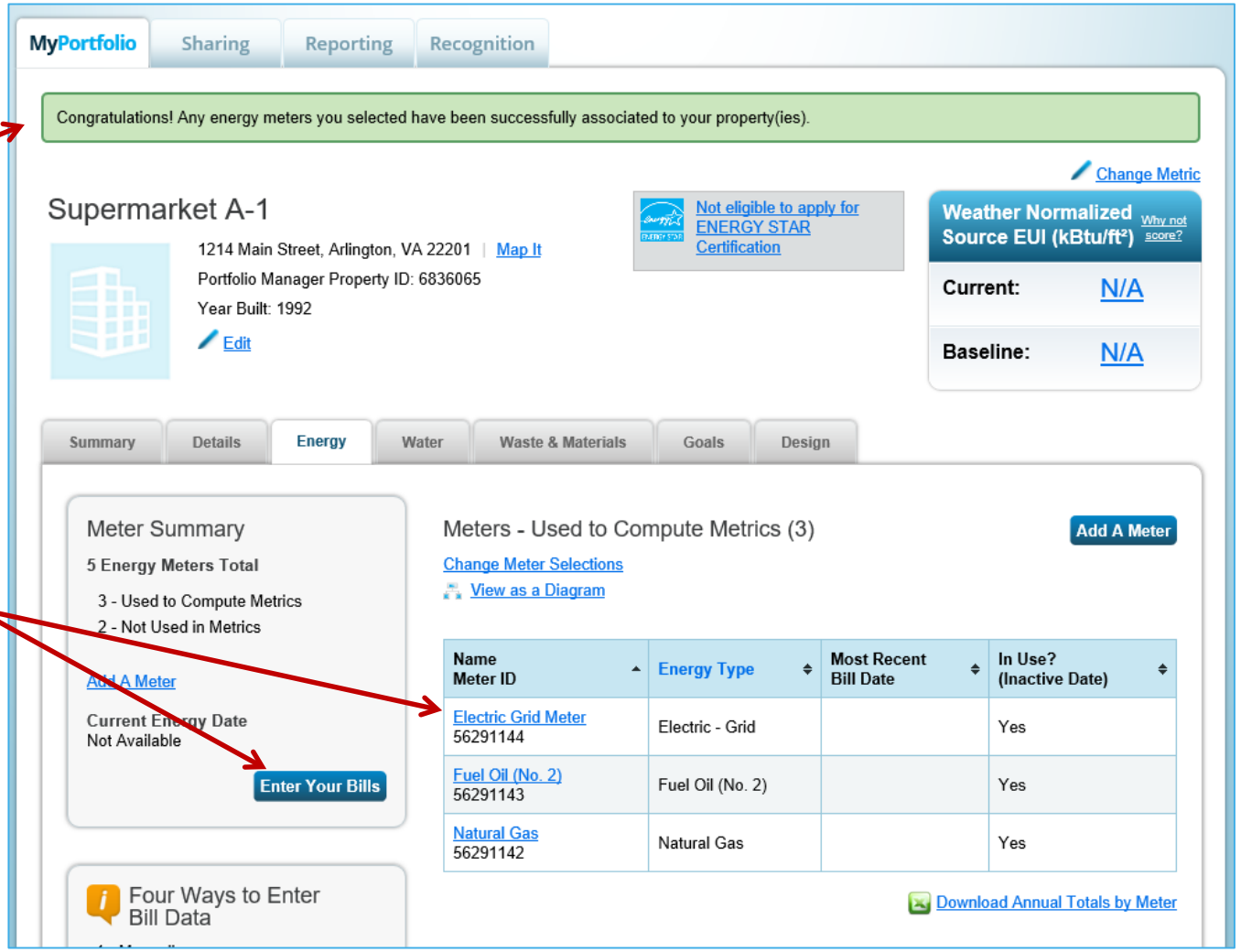
Meters to Add to Total Consumption



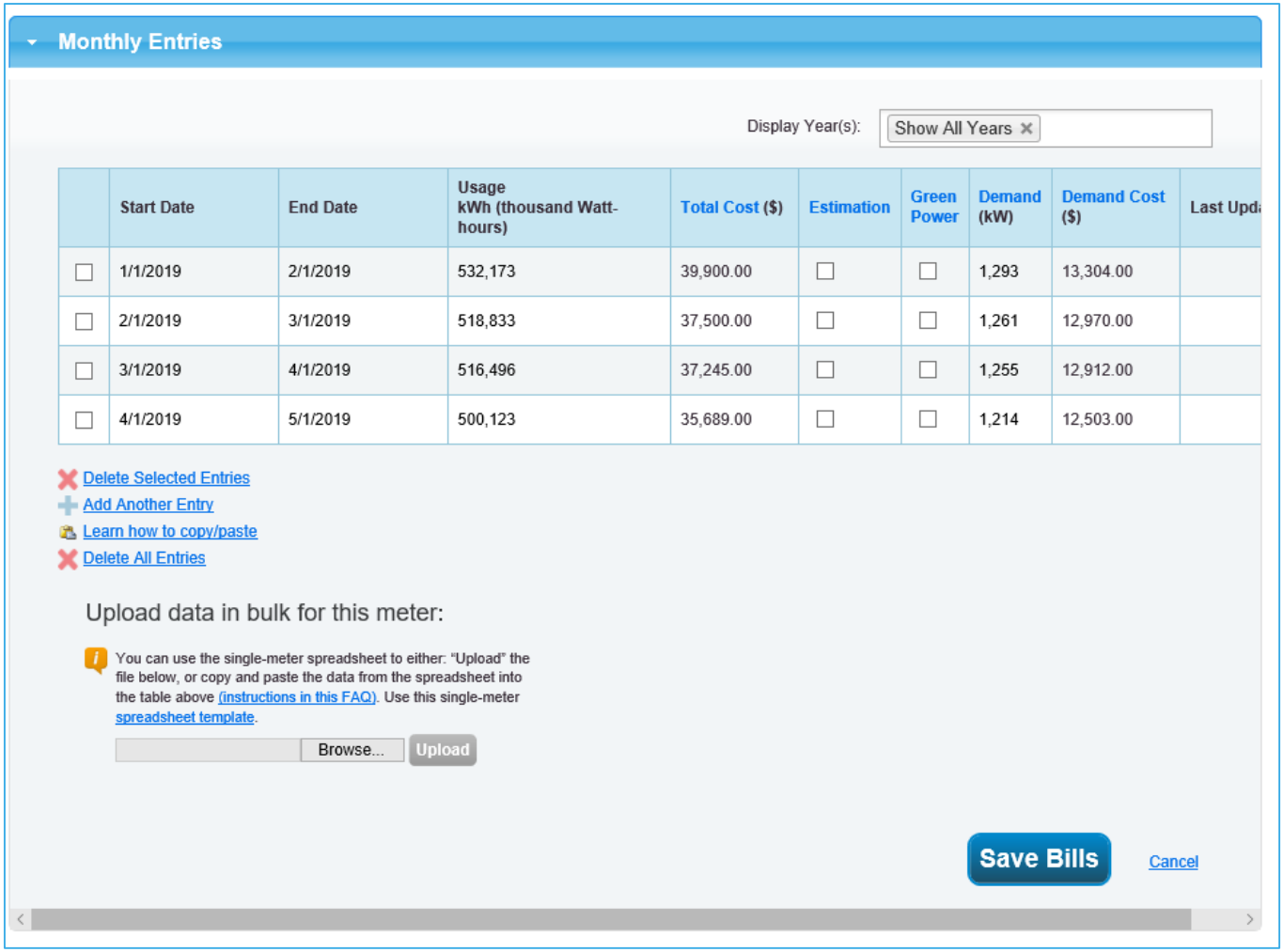
Energy Meters Tab: Meters Added and Displayed

Notification

Add or update bills



View Meter Data and Manage Bills for Your Property



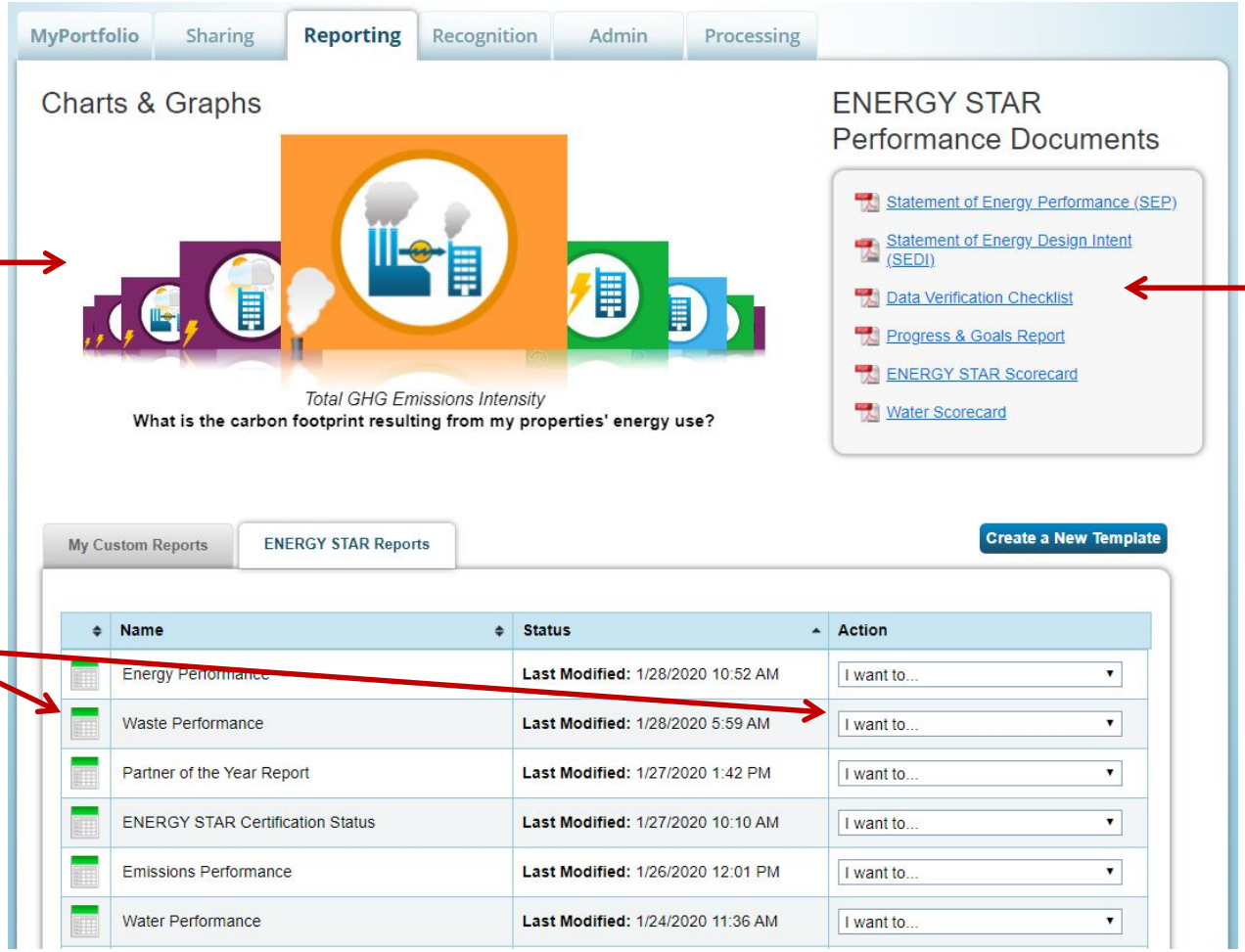
How To

- 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

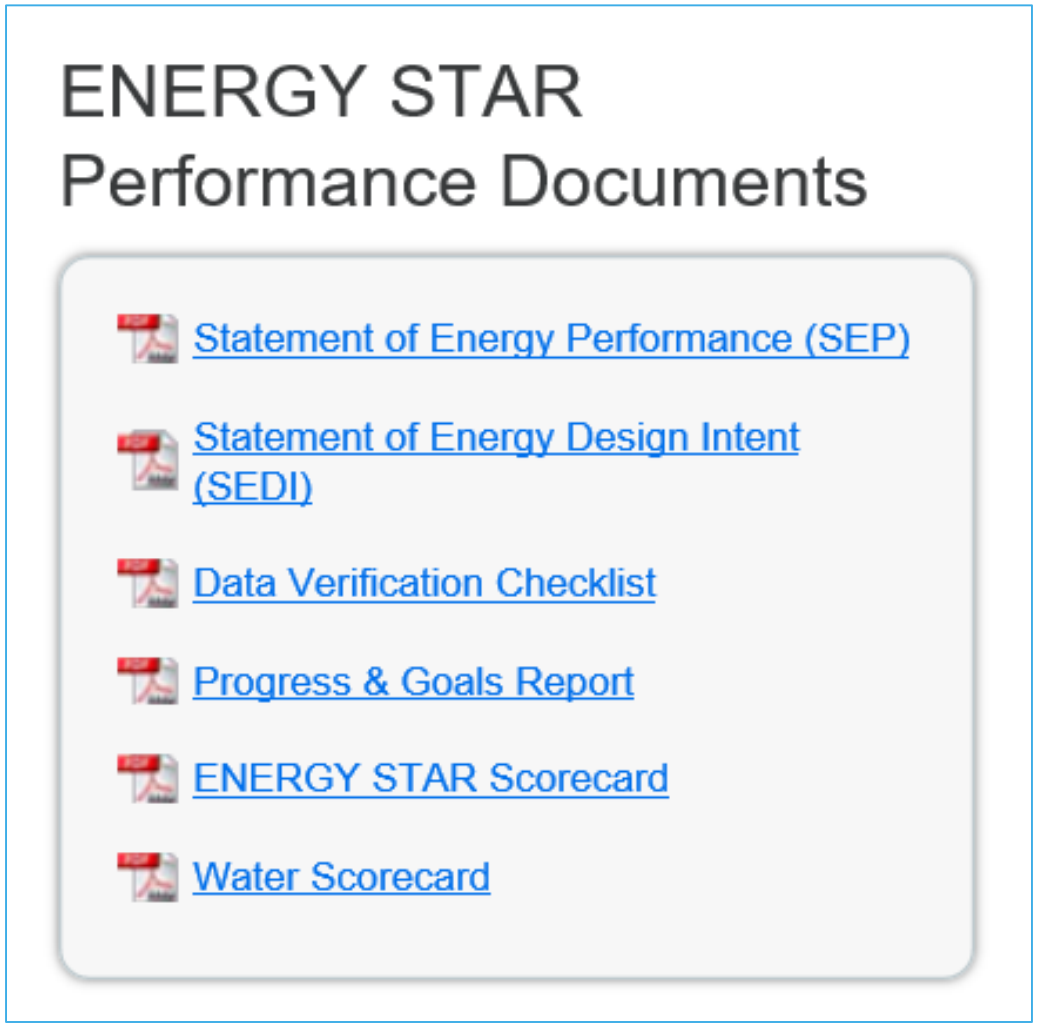
Choose from pre-set chart & graph options

Create and generate templates & reports



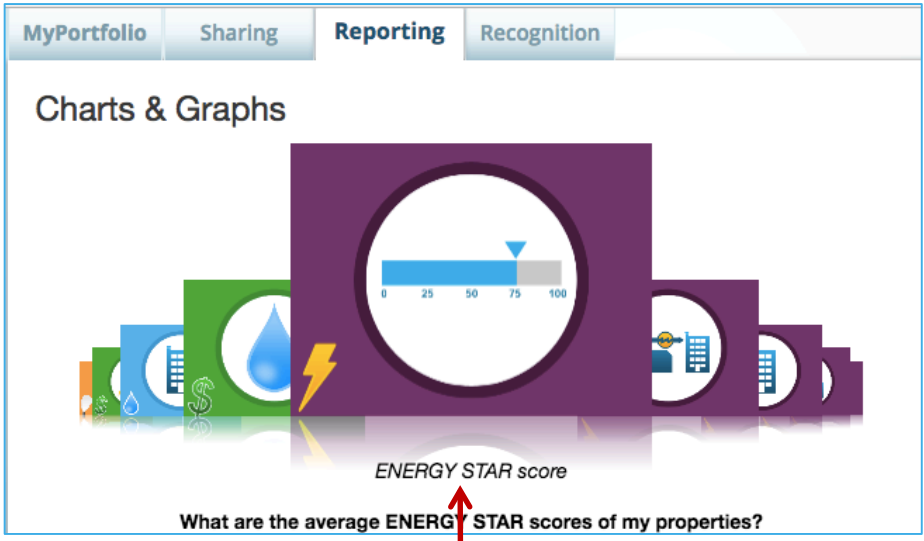
Download performance documents

Performance Documents



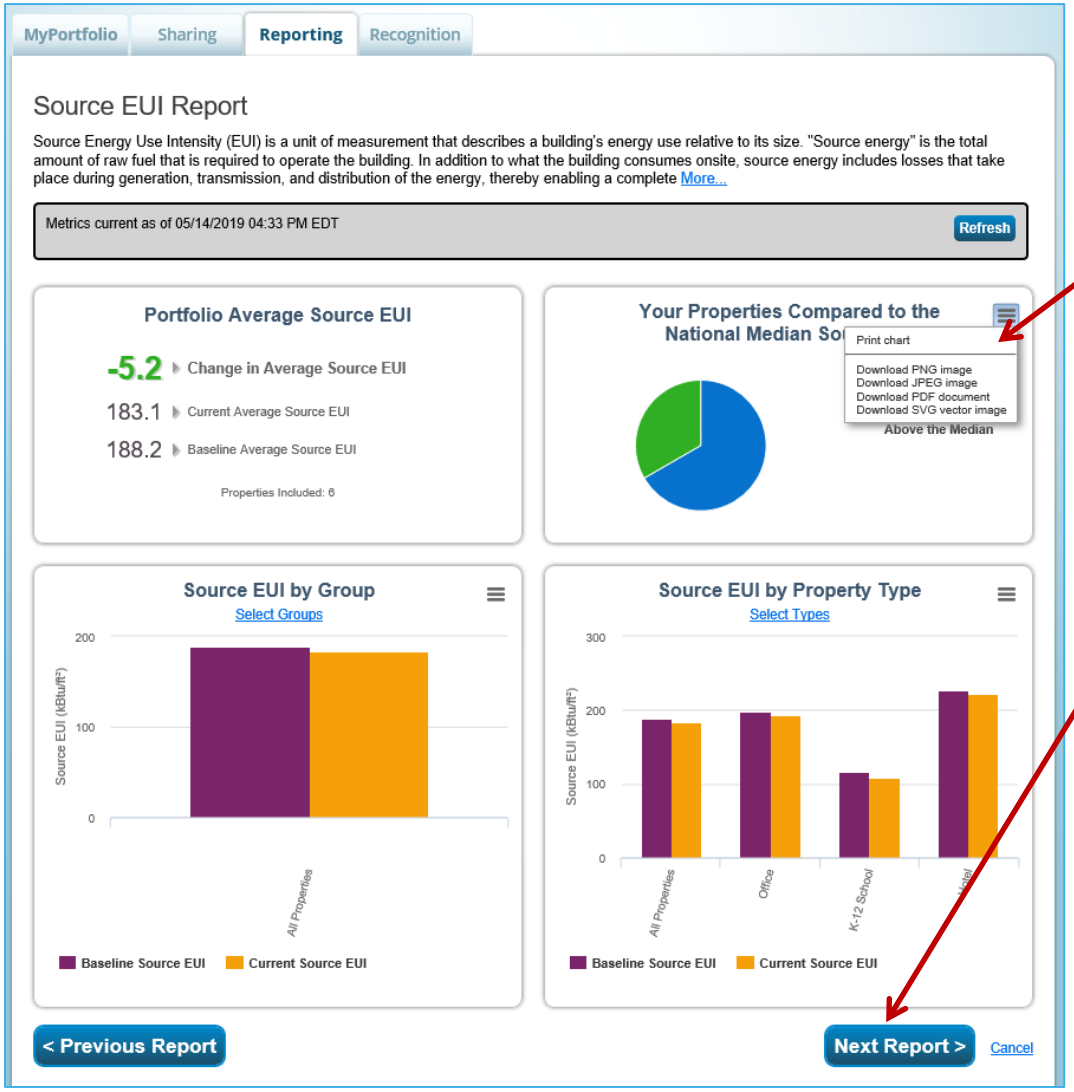
Charts & Graphs

- 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

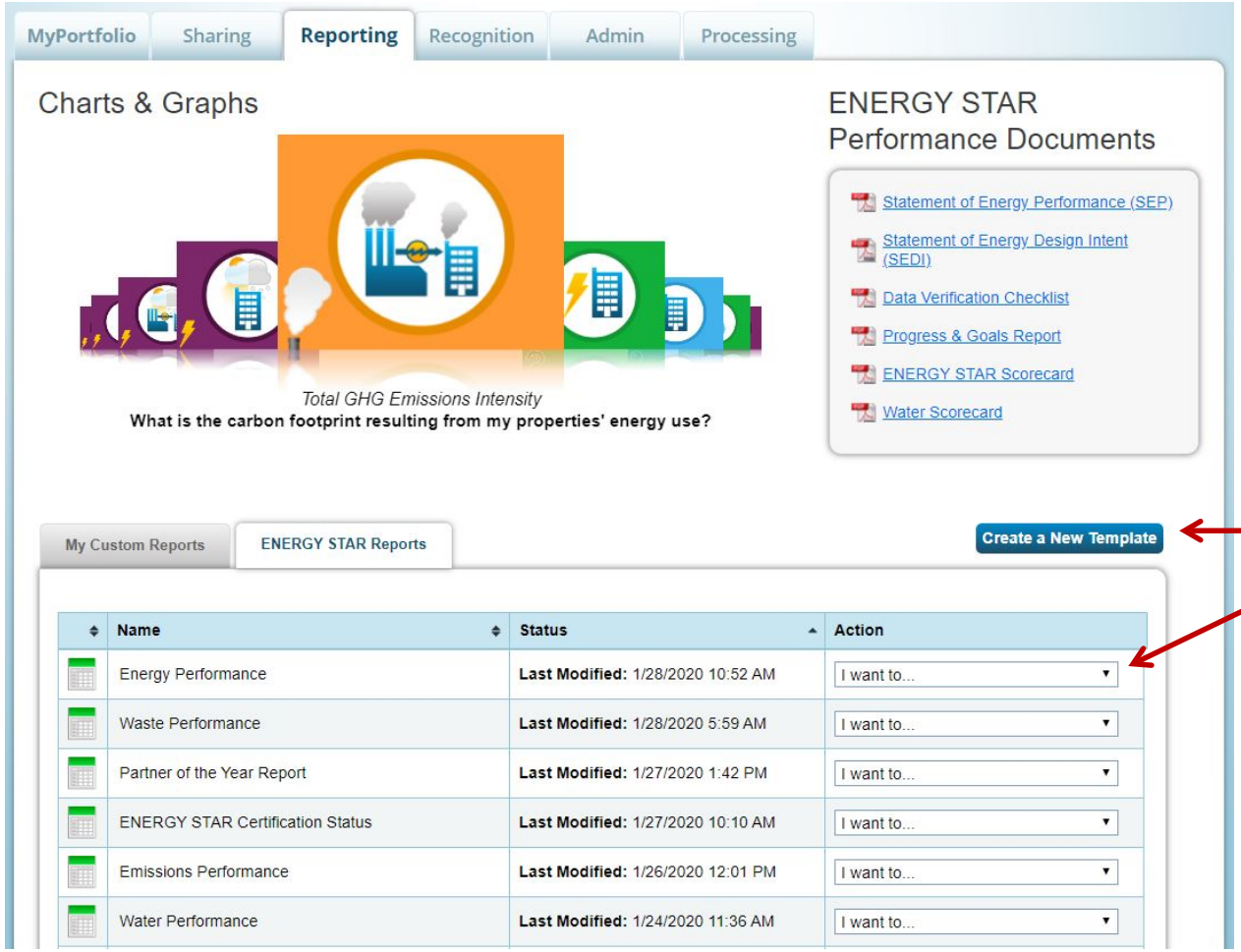


Print or download figures for use externally

View the next chart

Scroll to bottom to view and export raw data

Reporting Tab



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

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