

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 and water consumption data
 - Generate reports to assess progress

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®

- **Management Tool**
 - Assess whole building energy and water consumption
 - Track changes in energy, water, greenhouse gas emissions, cost over time
 - Track green power purchase
 - Share/report data with others
 - Create custom reports
 - Apply for ENERGY STAR certification
- **Metrics Calculator**
 - More than 150 metrics available
 - Energy consumption (source, site, weather normalized)
 - Water consumption (indoor, outdoor)
 - Greenhouse gas emissions (indirect, direct, total, avoided)
 - ENERGY STAR 1-to-100 score (available for many building types)
- **Accessible in a free, online secure platform**
 - www.energystar.gov/portfoliomanager



Track Performance

- ANY type of building can be benchmarked
- Compare your buildings against a national sample of similar buildings
- Compare all of your buildings of a similar type to each other
- Compare building(s) overtime, one period to the next
- Set priorities and targets to make the most of limited staff time and/or investment capital
- Track performance over time
- Gain recognition



Property Types Eligible for ENERGY STAR Score

- Bank Branch
- Barracks*
- Courthouse
- Data Center
- Distribution Center
- Financial Office
- Hospital (General Medical & Surgical)
- Hotel
- K-12 School
- Medical Office*
- Multifamily Housing
- Non-Refrigerated Warehouse
- Office
- Refrigerated Warehouse
- Residence Halls/Dormitory*
- Retail Store
- Senior Care Community
- Supermarket/Grocery Store
- Wastewater Treatment Plant*
- Wholesale Club/Supercenter
- Worship Facility

*Not eligible for ENERGY STAR Certification



To Get Started Benchmarking in Portfolio Manager

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

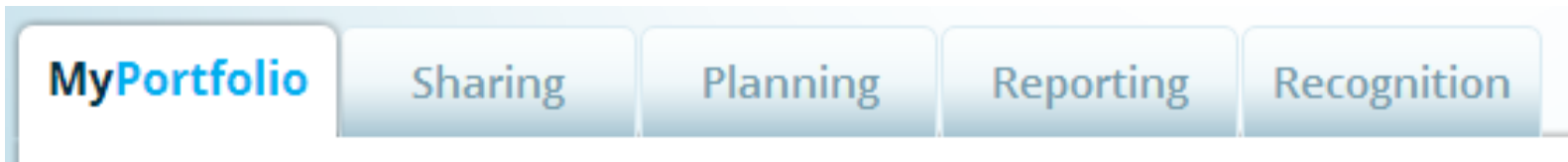


How To

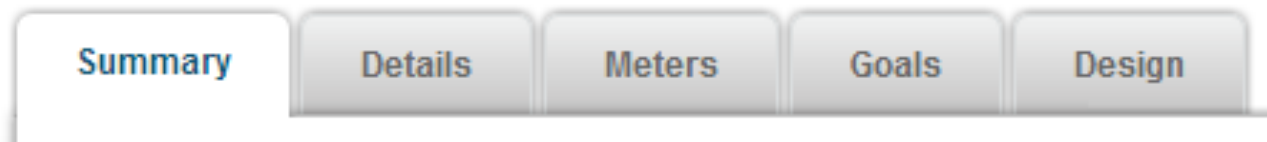
- **Navigate Portfolio Manager**
- Add a property and enter its use details
- Enter energy and water consumption data
- Generate reports to assess progress

Navigate Portfolio Manager

- Five portfolio level tabs



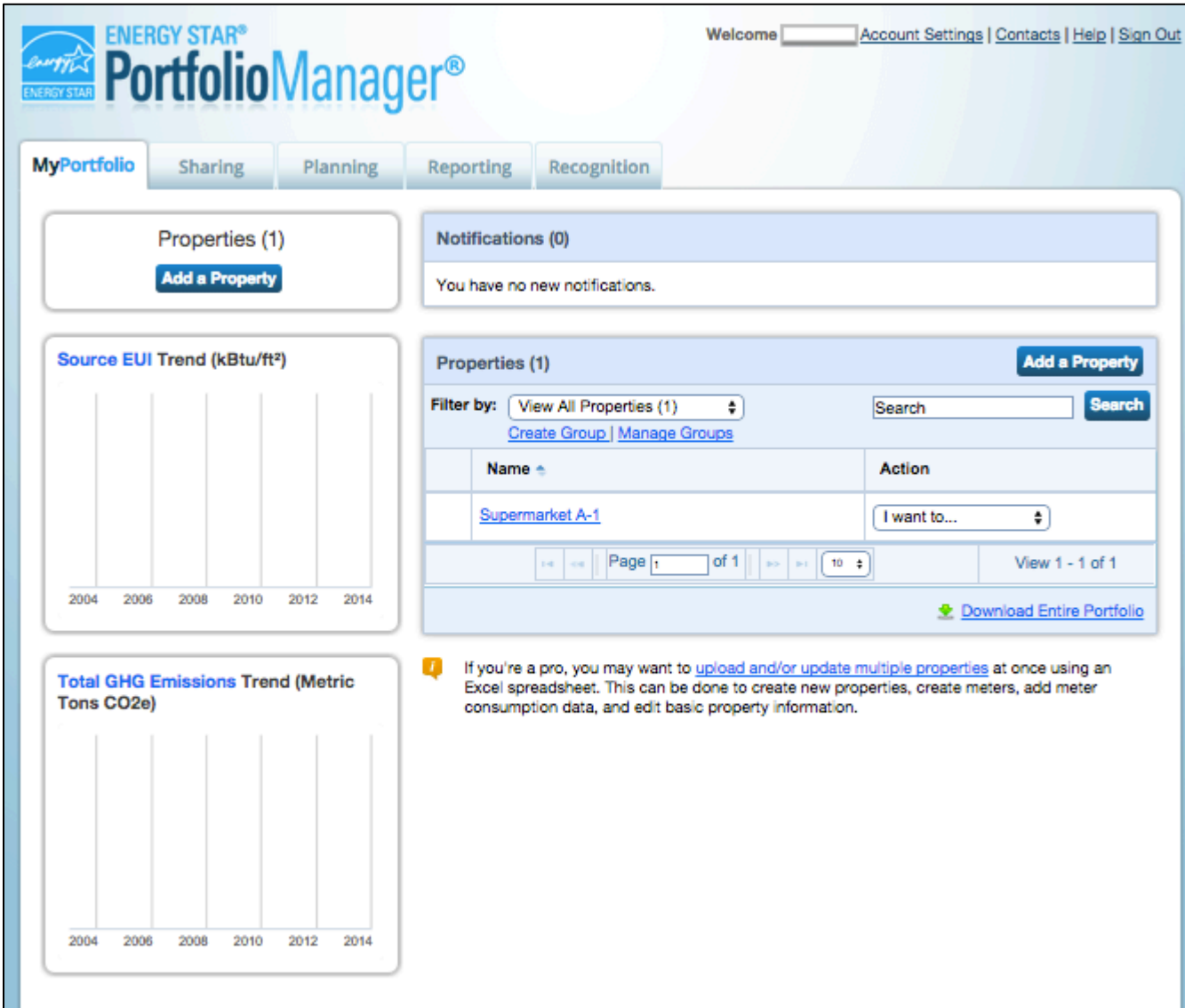
- Five property tabs



- Intuitive navigation – multiple ways to get to the same place

Navigate Portfolio Manager

Portfolio
level view

ENERGY STAR® PortfolioManager®


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

MyPortfolio | [Sharing](#) | [Planning](#) | [Reporting](#) | [Recognition](#)

Properties (1)
[Add a Property](#)

Notifications (0)
You have no new notifications.

Source EUI Trend (kBtu/ft²)



2004 2006 2008 2010 2012 2014

Properties (1) [Add a Property](#)

Filter by: [View All Properties \(1\)](#) [Search](#)


[Create Group](#) | [Manage Groups](#)

Name	Action
Supermarket A-1	I want to...

Page 1 of 1 | 10 | View 1 - 1 of 1

[Download Entire Portfolio](#)

Total GHG Emissions Trend (Metric Tons CO2e)



2004 2006 2008 2010 2012 2014

Tip: 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, create meters, add meter consumption data, and edit basic property information.

Navigate Portfolio Manager

Property
level view



ENERGY STAR® Portfolio Manager®

Welcome [] Account Settings | Contacts | Help | Sign Out

MyPortfolio | Sharing | Planning | Reporting | Recognition

Supermarket A-1
 1214 Main Street, Arlington, VA 22201 | [Map It](#)
 Portfolio Manager Property ID: 4437651 | Primarily: Supermarket/Grocery Store
 Year Built: 1991

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

Weather-Normalized Source EUI (kBtu/ft²)
 Current EUI: [N/A](#)
 Baseline EUI: [N/A](#)

Summary | Details | Meters | Goals | Design

Notifications (0)
 You have no new notifications.

Property Profile
 You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about your property, including a photo.
[Create Profile](#)

Source EUI Trend (kBtu/ft²)

Total GHG Emissions Trend (Metric Tons CO2e)

Metrics Summary

Metric	Baseline (Not Available)	Current (Not Available)	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 (Metric Tons CO2e)	Not Available	Not Available	N/A

Data Quality for this Property

The metrics that Portfolio Manager calculates depend on your [use details](#) and your energy bills. The data quality checker inspects the information you have entered to identify possible errors. If a property is shared with you as "Read Only," you will not be able to run the Data Quality Checker.

Date checker last run: [N/A](#)
 Result: Unable to Check | [Run Check](#)
[Now!](#)

[Check Data Quality](#)




Get Data In

3 ways to enter data for your property or portfolio:

1. Manually
2. Uploading spreadsheets
3. Hiring a 3rd party to exchange data directly with Portfolio Manager via web services

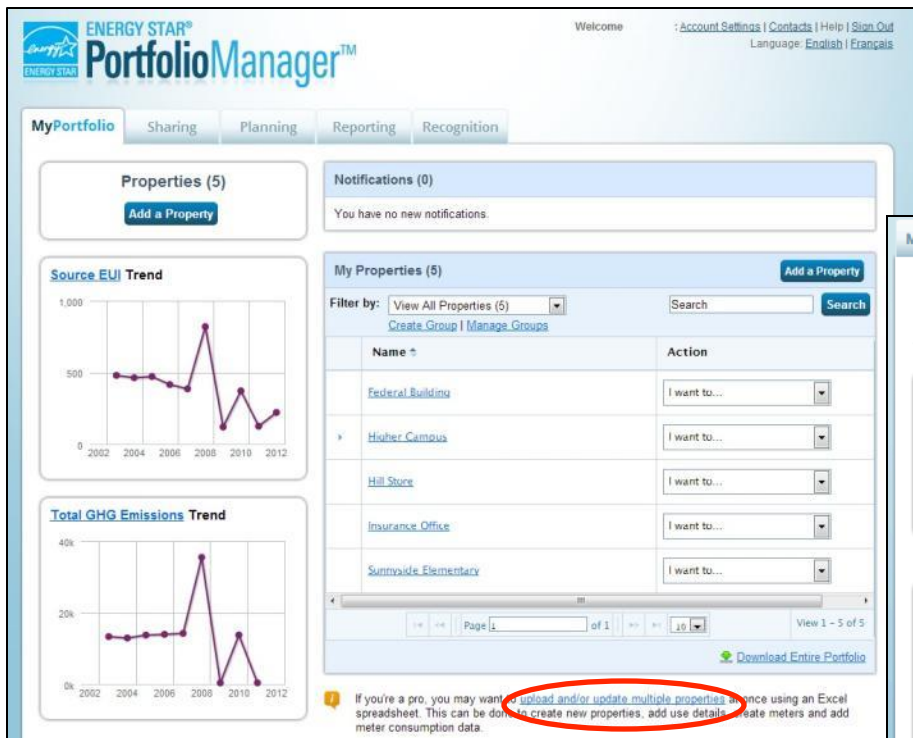
Get Data In: Manually



The screenshot shows the Energy Star Portfolio Manager interface. The top navigation bar includes tabs for MyPortfolio, Sharing, Planning, Reporting, and Recognition. The main content area is divided into several sections:

- Properties (5)**: A section with a red circle around the **Add a Property** button.
- Notifications (0)**: A section indicating no new notifications.
- Source EUI Trend**: A line graph showing energy use intensity over time. The y-axis ranges from 0 to 1,000. The graph shows a sharp increase in energy use around the middle of the period.
- My Properties (5)**: A section with a filter dropdown set to **View All Properties** and a table listing properties. The first property listed is **Federal Building**.

Get Data In: Spreadsheet Upload



ENERGY STAR® PortfolioManager™

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

MyPortfolio | Sharing | Planning | Reporting | Recognition

Properties (5)
[Add a Property](#)

Source EUI Trend

Total GHG Emissions Trend

My Properties (5)
[Add a Property](#)

Filter by: View All Properties (5) | Search | Search

Name	Action
Federal Building	I want to...
Higher Campus	I want to...
Hill Stone	I want to...
Insurance Office	I want to...
Sunnyside Elementary	I want to...

Page 1 of 1 | View 1 - 5 of 5 | [Download Entire Portfolio](#)

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



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 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: No file chosen [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

- 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
- If you are using web services, you must “connect” and “share” your properties with your web service provider



How To

- Navigate Portfolio Manager
- [Add a property and enter its use details](#)
- Enter energy and water consumption data
- Generate reports to assess progress


Add a Property



The screenshot shows the ENERGY STAR PortfolioManager interface. The top navigation bar includes tabs for MyPortfolio, Sharing, Planning, Reporting, and Recognition. The main content area is divided into several sections:

- Properties (5)**: A section containing a red-outlined button labeled **Add a Property**.
- Notifications (0)**: A section stating "You have no new notifications."
- Source EUI Trend**: A line graph showing energy usage trends over time. The y-axis ranges from 0 to 1,000. The graph shows a series of data points connected by a line, with a notable peak around the middle of the timeline.
- My Properties (5)**: A section with a filter dropdown set to "View All Properties" and links for "Create Group" and "Manage". Below this is a table with a header "Name" and a single entry "Federal Building".


Add a Property: Existing Property


 **ENERGY STAR®**
PortfolioManager®


Welcome [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!


BANK


1 2 3


Y
Is
ne

Your Property's Primary Function

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

☒ Select a primary function

Banking/Financial Services

Bank Branch

Financial Office

Education

Adult Education

College/University

K-12 School

Other

Pre-school/Daycare

Vocational School

Entertainment/Public Assembly

Convention Center

Movie Theater

Museum

Other

Performing Arts

Recreation

Social/Meeting Hall

Stadium

Food Sales & Service

Convenience Store

Other

Restaurant/Bar

Supermarket/Grocery Store


Wholesale Club/Supercenter


Healthcare


Ambulatory Surgical Center

Hospital


[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 is 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](#).

Basic Property Information



ENERGY STAR®
PortfolioManager™

Welcome

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

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: * --- Select --- ▼

Street Address: *

City/Municipality: *


State/Province: * --- Select --- ▼

Postal Code: *

Year Built: *

Gross Floor Area: * Sq. Ft. ▼ ☐ [Temporary Value](#)
Gross Floor Area is the total floor area, expressed in square feet or square meters, measured from the principal exterior surfaces of the building(s) and not including parking area(s).

Occupancy: * [Select](#) ▼ %


Tip
The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

Check the Statements that Apply

Do any of these apply?

- ☐ My property's energy consumption includes [parking](#) areas

Back

Continue

[Cancel](#)



Tip

Answering these simple questions will help us guide you in entering your property correctly.



Follow Us    

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

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

Back

Continue

[Cancel](#)



Tip

Answering these simple questions will help us guide you in entering your property correctly.



Follow Us    

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

Enter Values for Property Use Details

Add Another Type of Use

Add

▼ 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 on-site 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.

Characteristic	Value	Current As Of	Temporary Value
Gross Floor Area	12000 Sq. Ft.	01/01/1992	<input type="checkbox"/>
Weekly Operating Hours			<input type="checkbox"/>
Number of Workers on Main Shift			<input type="checkbox"/>
Number of Computers			<input type="checkbox"/>
Number of Cash Registers			<input type="checkbox"/>
Cooking Facilities			<input type="checkbox"/>
Number of Open or Closed Refrigeration/Freezer Units			<input type="checkbox"/>
Number of Walk-in Refrigeration/Freezer Units			<input type="checkbox"/>
Percent That Can Be Heated			<input type="checkbox"/>
Percent That Can Be Cooled			<input type="checkbox"/>

▼ 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 on-site 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.


Characteristic	Value	Current As Of	Temporary Value
Gross Floor Area	12000 Sq. Ft.	01/01/1992	<input type="checkbox"/>
Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	01/01/1992	<input type="checkbox"/>
Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	01/01/1992	<input type="checkbox"/>

Back

Add Property

Cancel

Property Summary Tab




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

[MyPortfolio](#)
[Sharing](#)
[Planning](#)
[Reporting](#)
[Recognition](#)

Congratulations! You have successfully created your property. Next, would you like to:
[add energy use information](#), so that you can see your energy performance metrics?
[Enter specific information about my individual buildings](#), so that I can track them separately.

Supermarket A-1

1214 Main Street, Arlington, VA 22201 | [Map It](#)
 Portfolio Manager Property ID: 4437651 | Primarily:
[Supermarket/Grocery Store](#)
 Year Built: 1991



Not eligible to apply for
ENERGY STAR
Certification

**Weather-Normalized
Source EUI (kBtu/ft²)**

Current EUI: [N/A](#)

Baseline EUI: [N/A](#)

[Summary](#)
[Details](#)
[Meters](#)
[Goals](#)
[Design](#)

Notifications (0)

You have no new notifications.

Property Profile

You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about your property, including a photo.

[Create Profile](#)


Source EUI Trend (kBtu/ft²)

--	--	--	--	--	--

Metrics Summary

Metric	Baseline (Not Available)	Current (Not Available)	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 (Metric Tons CO ₂ e)	Not Available	Not Available	N/A

Data Quality for this Property

 Unfortunately, you cannot run the checker until you have at least one period of 12 full months of [use details](#) and bills (energy consumption information entered for your meters). Once you have this data, you can run

Add and Set up a Property: More than One Building



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?

Select a primary function

[Learn more about primary functions/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 a fictitious property I am entering into Portfolio Manager in order to try out features or for other purposes such as training others.

Tip

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

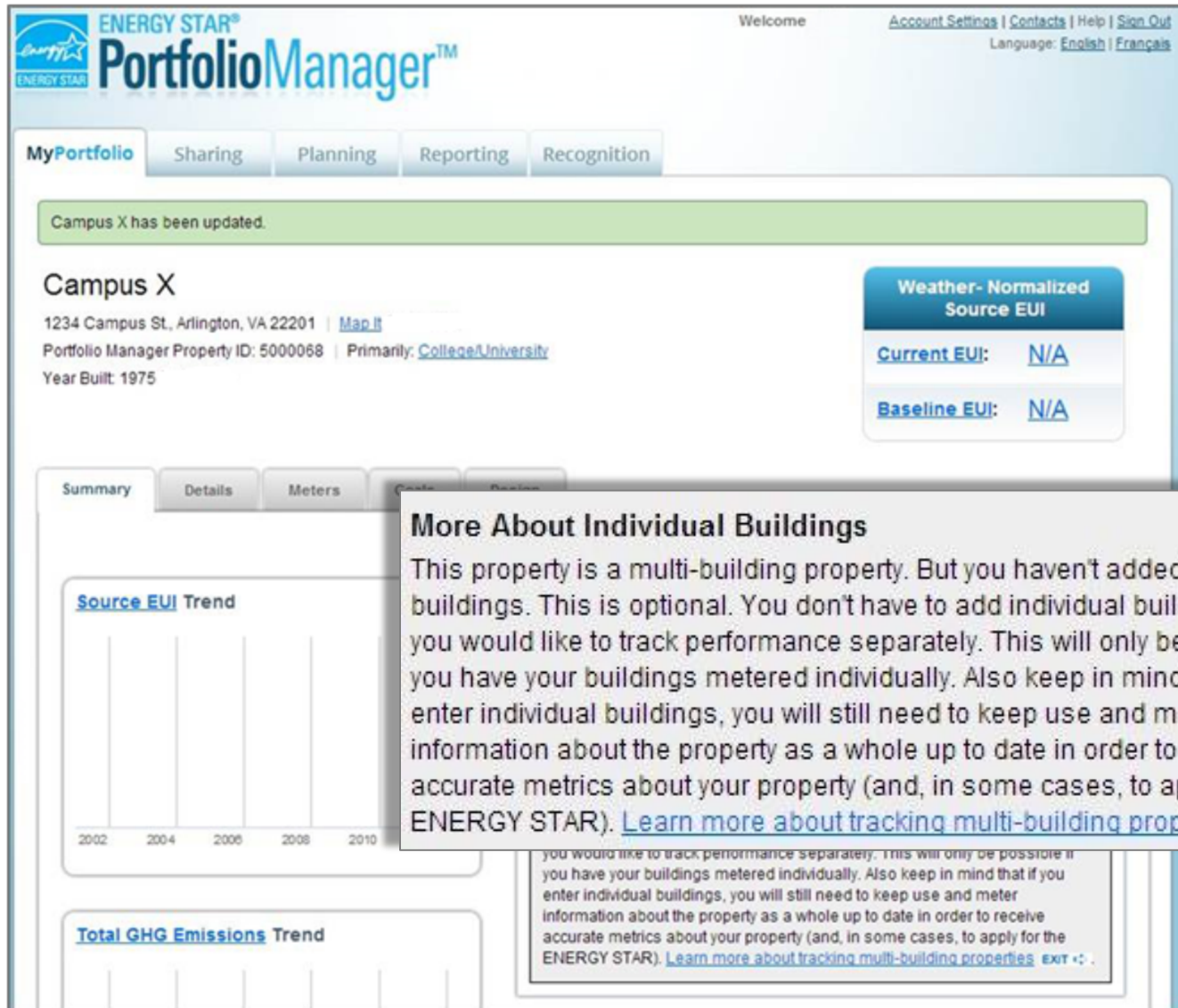
Tip

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 in your [Account](#).

Campus Features



The screenshot displays the ENERGY STAR Portfolio Manager web application. At the top, the header includes the ENERGY STAR logo, the title "PortfolioManager™", and navigation links for "Welcome", "Account Settings", "Contacts", "Help", and "Sign Out". Below the header, a navigation bar shows "MyPortfolio" as the active tab, with other tabs for "Sharing", "Planning", "Reporting", and "Recognition". A green notification bar states "Campus X has been updated." Below this, the "Campus X" section provides address information (1234 Campus St., Arlington, VA 22201), a "Map It" link, Portfolio Manager Property ID (5000068), Primary (College/University), and Year Built (1975). To the right, a "Weather-Normalized Source EUI" box shows "Current EUI: N/A" and "Baseline EUI: N/A". Below the campus information, tabs for "Summary", "Details", "Meters", "Credits", and "Actions" are visible. The "Summary" tab is active, showing a "Source EUI Trend" chart with a y-axis from 0 to 10 and an x-axis from 2002 to 2010. Below the chart is a "Total GHG Emissions Trend" section. A tooltip titled "More About Individual Buildings" is overlaid on the right side of the chart, explaining that this is a multi-building property and that individual buildings can be added for separate tracking. The tooltip text reads: "This property is a multi-building property. But 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](#) EXIT ↗".



How To

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

Property Meters Tab

ENERGY STAR® Portfolio Manager®

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

MyPortfolio | [Sharing](#) | [Planning](#) | [Reporting](#) | [Recognition](#)

Congratulations! You have successfully created your property. Next, would you like to:
[add energy use information](#), so that you can see your energy performance metrics?
[Enter specific information about my individual buildings](#), so that I can track them separately.

Supermarket A-1
 1214 Main Street, Arlington, VA 22201 | [Map It](#)
 Portfolio Manager Property ID: 4437651 | Primarily: [Supermarket/Grocery Store](#)
 Year Built: 1991

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

Weather-Normalized Source EUI (kBtu/ft²)
 Current EUI: [N/A](#)
 Baseline EUI: [N/A](#)

Summary | **Details** | **Meters** | **Goals** | **Design**

Energy & Water Consumption
[Manage/Enter My Bills](#)

Meters for Performance Metrics
[Select Meters](#)

Utility & Weather
Electric Distribution Utility (EDU):
 Virginia Electric & Power Co
 [Dominion Resources Inc]
Regional Power Grid:
 Virginia/Carolina
Weather Station:
 WASHINGTON/NATIONAL (724)


Energy Meters (0)
[View as a Diagram](#) [Add Another Meter](#)

Water Meters (0)
[View as a Diagram](#) [Add Another Meter](#)

Informational Messages:
 In order to receive a score for your property, you must provide an energy meter. You have not entered any meters yet. After [entering the meter](#), you will need to [associate](#) it in order to receive a score.
 For a step-by-step guide to entering meter data, see [How to get Utility Data into Portfolio Manager](#).
 You have not entered any water meters yet. After [entering the meter](#), you will need to [associate](#) it in order to receive metrics.

Your electric distribution utility (EDU) and weather station selection affects your energy performance score.


Answer Questions About Energy Use in Your Property


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](#)

Follow Us    

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

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
 - ☐ purchased from the grid
 - ☐ generated onsite with my own solar panels
 - ☐ generated onsite with my own wind turbines
- ☒ Natural Gas

How Many Meters?
- ☐ Propane
- ☒ Fuel Oil (No. 2)

How Many Meters?
- ☐ Diesel
- ☐ District Steam
- ☐ District Hot Water
- ☐ District Chilled Water

Don't see your energy sources?

[+ See more energy sources?](#)

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.

Entering Your Meters in Bulk

For advanced users, you may prefer to use the upload tool to [set 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](#)




Your Property's Water Usage

What kind of **water** do you want to track? Please select all that apply.

- ☐ Municipally Supplied Potable Water
- ☐ Municipally Supplied Reclaimed Water
- ☐ Alternative Water Generated On-Site:
- ☐ Other:

About Your Meters


ENERGY STAR®
PortfolioManager®

Welcome

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

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.

3 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?
<input type="checkbox"/>	Natural Gas	Natural Gas				<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input checked="" type="checkbox"/>	Fuel Oil (No. 2)	Fuel Oil (No. 2)				<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		<input type="checkbox"/>


[X Delete Selected Entries](#)
[+ Add Another Entry](#)

2 Water 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
<input type="checkbox"/>		Alternative: Combined Indoor/Outdoor or Other				<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>		Alternative: Combined Indoor/Outdoor or Other				<input checked="" type="checkbox"/>	

[X Delete Selected Entries](#)
[+ Add Another Entry](#)


[Cancel](#)



Follow Us
 [!\[\]\(816d0567398778a19c4fe82ba03434ff_img.jpg\)](#)
[!\[\]\(2e51ca65d1ac27f97a7d538d1cd44120_img.jpg\)](#)
[!\[\]\(0591e1e8082debcf69d06fd6bc8e469d_img.jpg\)](#)
[!\[\]\(b871f240cbf2cbc199018ff9f73f457e_img.jpg\)](#)

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

Click in Table to Edit Meter Information

 **ENERGY STAR®**
PortfolioManager™

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

About Your Meters for Supermarket A-1

Enter the information below about your new meters. The meter's units and first bill date are required. You can also change the meter's name.

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

<input type="checkbox"/>	Meter Name	Type	Units	First Bill Date	In Use?	End Date	Enter as Delivery?
<input type="checkbox"/>	Natural Gas	Natural Gas			<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid	kWh (thousand)		<input checked="" type="checkbox"/>		<input type="checkbox"/>





[Delete Selected Entries](#)
[Add Another Entry](#)

1 Water Meter for Supermarket A-1 (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Units	First Bill Date	In Use?	End Date
<input type="checkbox"/>	Potable Indoor Meter	Potable Indoor			<input checked="" type="checkbox"/>	

[Delete Selected Entries](#)
[Add Another Entry](#)

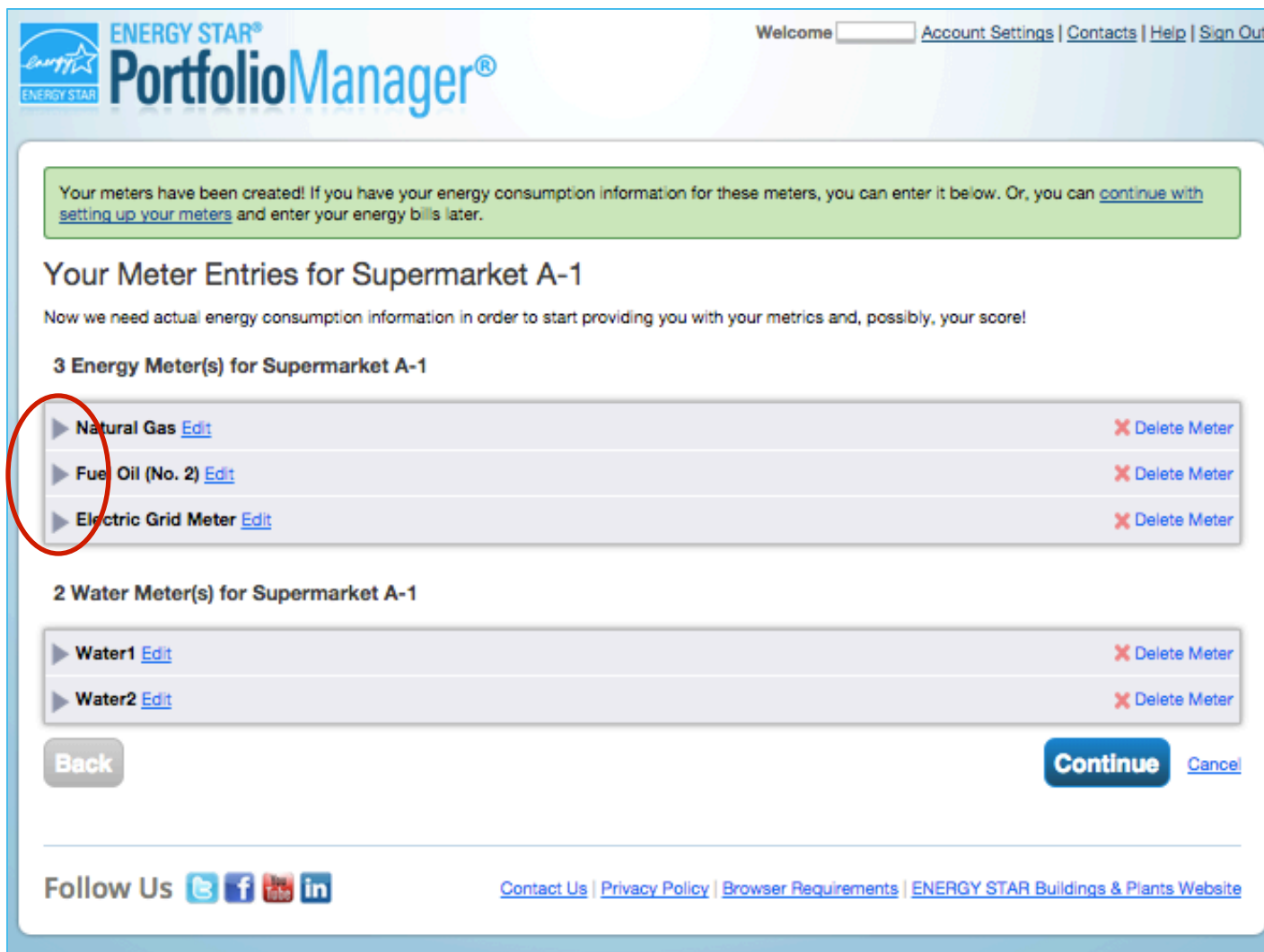
[Back](#) [Continue](#) [Cancel](#)

[Follow Us](#)    

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

Add Energy Consumption Information

Expand
meter by
clicking
arrow



ENERGY STAR®
PortfolioManager®

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

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.

Your Meter Entries for Supermarket A-1

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

3 Energy Meter(s) for Supermarket A-1

▶ Natural Gas Edit	✕ Delete Meter
▶ Fuel Oil (No. 2) Edit	✕ Delete Meter
▶ Electric Grid Meter Edit	✕ Delete Meter

2 Water Meter(s) for Supermarket A-1

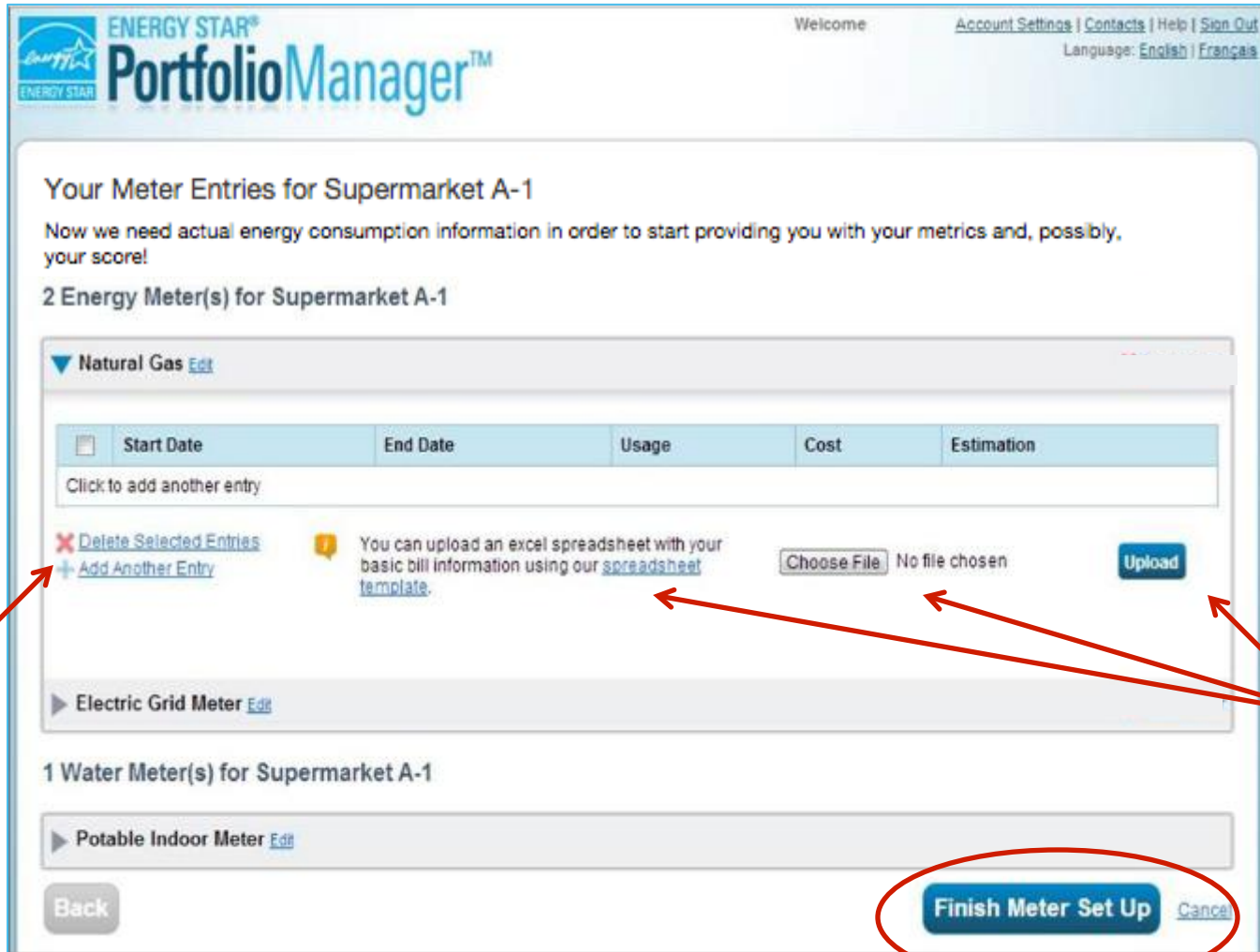
▶ Water1 Edit	✕ Delete Meter
▶ Water2 Edit	✕ Delete Meter

[Back](#) [Continue](#) [Cancel](#)

Follow Us [Twitter](#) [Facebook](#) [YouTube](#) [LinkedIn](#)

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

Add Meter Entries and Fill in Data



ENERGY STAR® PortfolioManager™

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

Your Meter Entries for Supermarket A-1

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

2 Energy Meter(s) for Supermarket A-1

▼ Natural Gas [Edit](#)

<input type="checkbox"/>	Start Date	End Date	Usage	Cost	Estimation
Click to add another entry					

[Delete Selected Entries](#) [+ Add Another Entry](#)

You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#).

[Choose File](#) No file chosen [Upload](#)

► Electric Grid Meter [Edit](#)

1 Water Meter(s) for Supermarket A-1

► Potable Indoor Meter [Edit](#)

[Back](#) [Finish Meter Set Up](#) [Cancel](#)

Click the
“+” to add
entries

Upload a
spreadsheet,
using
template


Meters to Add to Total Consumption

Your meter entries have been added to your meters!

Meters to add to Total Consumption for Metrics for Supermarket A-1

Tell us which meters to include when calculating the total usage for this property so that we can provide you with the most accurate metrics possible.

Property Totals




Energy Meters
Check the boxes for the meters that should be included in the energy metrics:

<input type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	Natural Gas
<input checked="" type="checkbox"/>	Electric Grid Meter
<input checked="" type="checkbox"/>	Fuel Oil (No. 2)

Total of 3 energy meter(s). Tell us what these meter(s) measure:

- ☒ These meter(s) account for the total energy consumption for this property.
- ☐ These meter(s) do not account for the total energy consumption for this property.




Water Meters
Check the boxes for the meters that should be included in the water metrics:

<input type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	Water2
<input checked="" type="checkbox"/>	Water1

Total of 2 water meter(s). Tell us what these meter(s) measure:

- ☒ These meter(s) account for the total water consumption for this property.
- ☐ These meter(s) do not account for the total water consumption for this property.



Because of the wide variety of ways that people meter their properties, after you create meters for your property in Portfolio Manager, you must indicate which meters to use for your property metrics. In some cases, you will not want a meter to count for your metrics. For example, 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.](#)

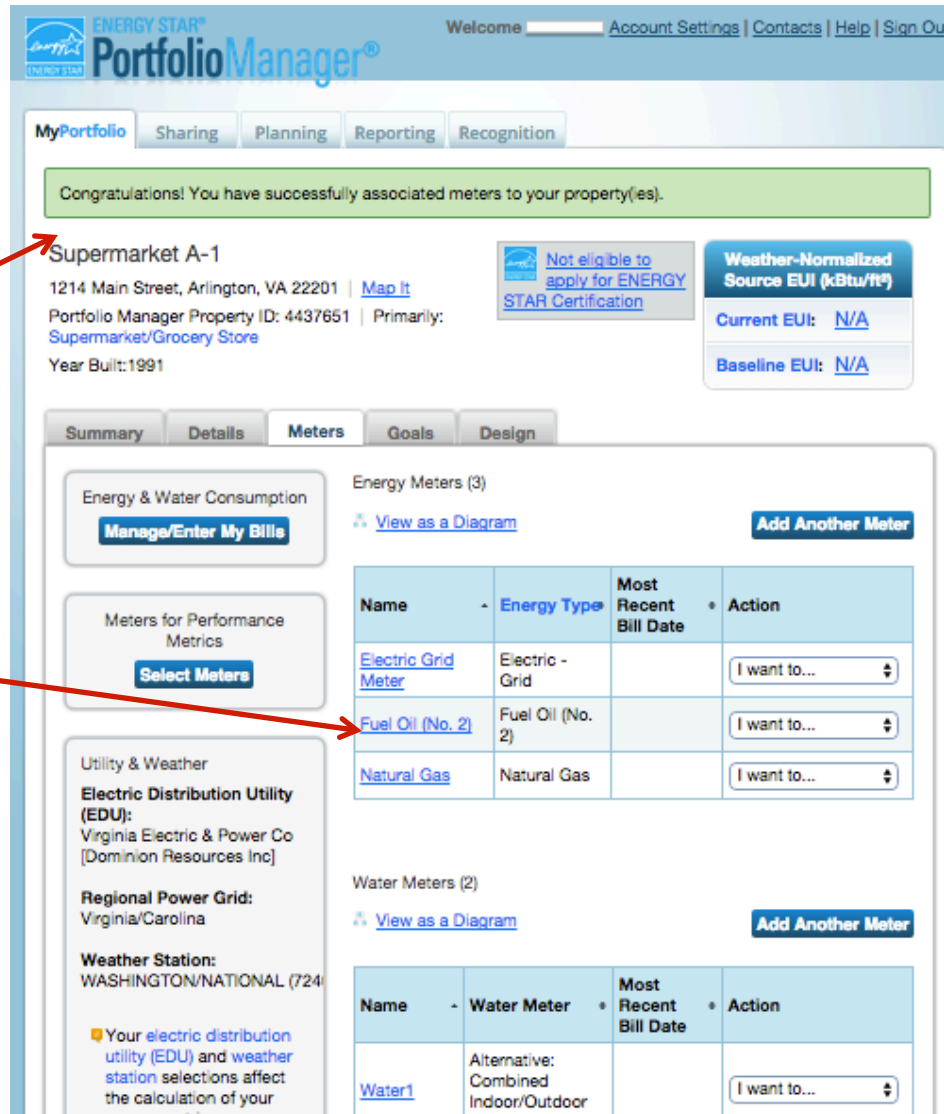
Apply Selections

Cancel

Property Meters Tab: Meters Added and Displayed

Notification

Click for details



ENERGY STAR® PortfolioManager®

Welcome [User] | Account Settings | Contacts | Help | Sign Out

MyPortfolio | Sharing | Planning | Reporting | Recognition

Congratulations! You have successfully associated meters to your property(ies).

Supermarket A-1
1214 Main Street, Arlington, VA 22201 | [Map It](#)
Portfolio Manager Property ID: 4437651 | Primarily: Supermarket/Grocery Store
Year Built: 1991

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

Weather-Normalized Source EUI (kBtu/ft²)
Current EUI: [N/A](#)
Baseline EUI: [N/A](#)

Summary | Details | **Meters** | Goals | Design

Energy & Water Consumption
[Manage/Enter My Bills](#)

Meters for Performance Metrics
[Select Meters](#)

Utility & Weather
Electric Distribution Utility (EDU):
Virginia Electric & Power Co [Dominion Resources Inc]
Regional Power Grid:
Virginia/Carolina
Weather Station:
WASHINGTON/NATIONAL (724)

[Your electric distribution utility \(EDU\) and weather station selections affect the calculation of your energy metrics.](#)


Energy Meters (3)
[View as a Diagram](#) [Add Another Meter](#)

Name	Energy Type	Most Recent Bill Date	Action
Electric Grid Meter	Electric - Grid		I want to...
Fuel Oil (No. 2)	Fuel Oil (No. 2)		I want to...
Natural Gas	Natural Gas		I want to...

Water Meters (2)
[View as a Diagram](#) [Add Another Meter](#)

Name	Water Meter	Most Recent Bill Date	Action
Water1	Alternative: Combined Indoor/Outdoor		I want to...

View Meter Data and Manage Bills for Your Property


ENERGY STAR®
PortfolioManager™

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


Manage Bills (Meter Entries) for [Hill Store](#)

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

Select Meter

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

<input type="checkbox"/>	Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost	Estimation	Green Power?
<input type="checkbox"/>	8/23/2004	9/22/2004	50400	4010.43	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	9/23/2004	10/22/2004	36320	2271.72	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	10/23/2004	11/22/2004	81920	3017.24	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	11/23/2004	12/22/2004	114720	3949.8	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	12/23/2004	1/22/2005	159520	5228.96	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	1/23/2005	2/22/2005	103200	3609.94	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	2/23/2005	3/22/2005	63840	2451.61	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	3/23/2005	4/22/2005	50880	2286.12	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	4/23/2005	5/22/2005	40320	1565.92	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	5/23/2005	6/22/2005	30560	1117.29	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	6/23/2005	7/22/2005	18400	674.58	<input type="checkbox"/>	<input type="checkbox"/>



How To

- Navigate Portfolio Manager
- Add a property and enter its use details
- Enter energy and water consumption data
- **Generate reports to assess progress**



Data Analysis in Portfolio Manager

- Ways to analyze progress and performance
 - Charts and graphs
 - Performance documents
 - Standard reports

Reporting Tab

MyPortfolio

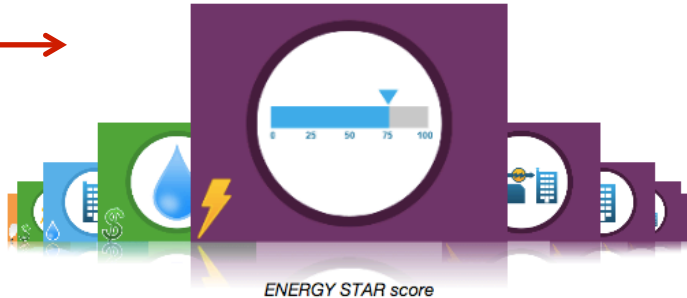
Sharing

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
Performance Highlights	No Report Generated	I want to...
Energy Performance	No Report Generated	I want to...
Emissions Performance	No Report Generated	I want to...
Water Performance	No Report Generated	I want to...
Fuel Performance	No Report Generated	I want to...

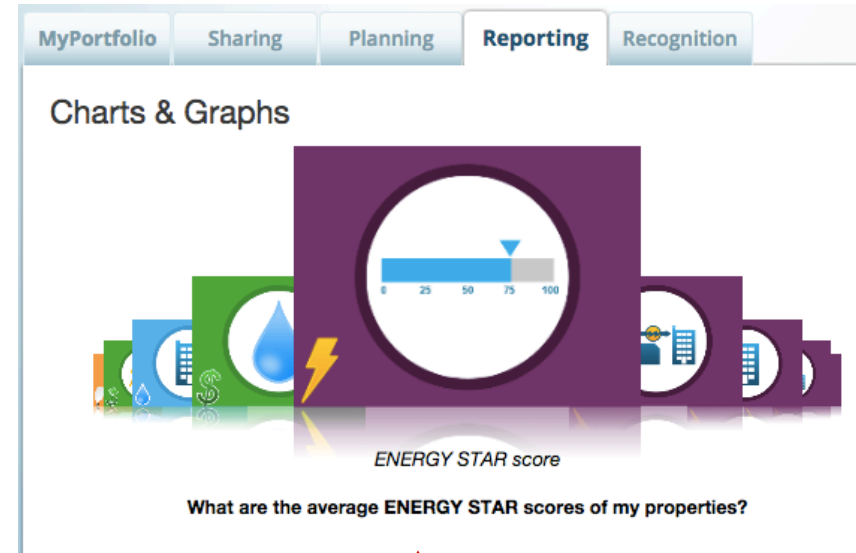
Choose from pre-set chart & graph options

Create and generate templates & reports

Download performance documents

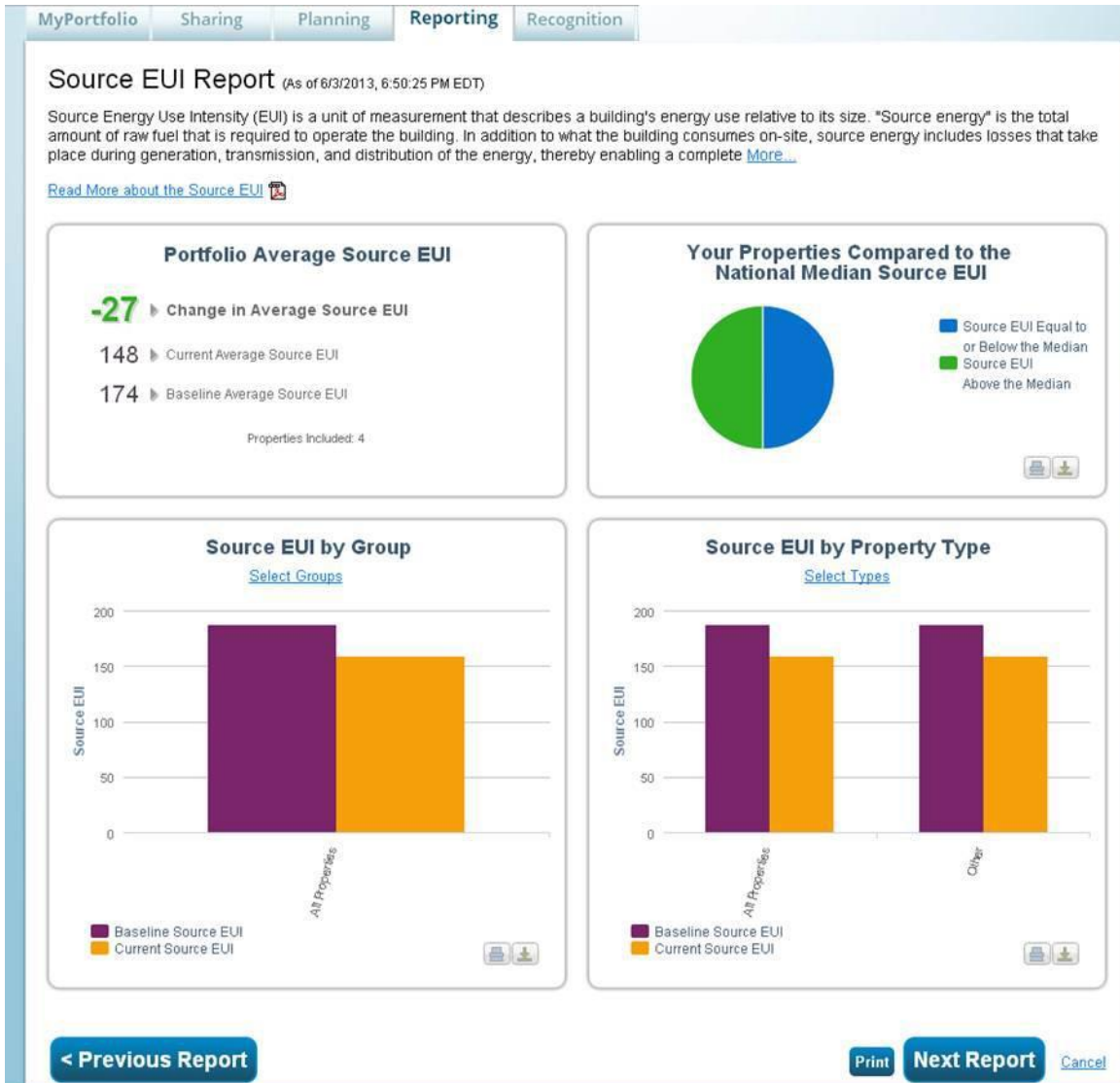
Charts & Graphs

- 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 template
Charts & Graphs.

Reporting Tab: Charts & Graphs

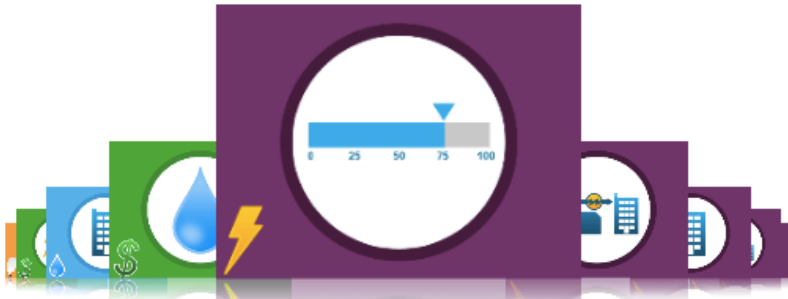


- Each of the figures can be printed or downloaded for easy insertion into a presentation or document
- If you scroll down on the page, you can view and export the raw data for the charts & graphs

Reporting Tab

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
 Performance Highlights	No Report Generated	<input type="text" value="I want to..."/>
 Energy Performance	No Report Generated	<input type="text" value="I want to..."/>
 Emissions Performance	No Report Generated	<input type="text" value="I want to..."/>
 Water Performance	No Report Generated	<input type="text" value="I want to..."/>
 Fuel Performance	No Report Generated	<input type="text" value="I want to..."/>

Create and generate templates & reports



Standard Reports

- Performance Highlights
- Energy Performance
- Emissions Performance
- Water Performance
- Fuel Performance
- ENERGY STAR Certification Status
- Partner of the Year Report
- Sustainable Buildings Checklist Report



Recap

- We learned how to:
 - Navigate Portfolio Manager
 - Add a property and enter its use details
 - Enter energy and water consumption data
 - Generate reports to assess progress



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](http://www.energystar.gov/index.cfm?c=evaluate_performance.bus_portfoliomanager_model_tech_desc)



Thank you for attending!

Questions?

If you have any questions on Portfolio Manager or the ENERGY STAR program, contact us at:

www.energystar.gov/BuildingsHelp