

What's New in Portfolio Manager®?

EPA's ENERGY STAR Portfolio Manager tool helps you measure and track energy use, water use, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the results to identify under-performing buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance.

By entering details about your property and consumption data for energy or water, you can:

- ✓ Assess whole building energy performance.
- ✓ Track changes in energy, water, greenhouse gas emissions, and cost over time.
- ✓ Track green power purchases.
- ✓ Create custom reports.
- ✓ Share data with others.

Learn more about the new tool's features and functionalities!

Navigate with Ease

The new Portfolio Manager user interface is streamlined and simple to navigate, and the tabular format allows you to easily switch between views at the property and portfolio levels.



Portfolio Manager's database architecture has also been optimized, resulting in increased system speed and performance.

Accuracy Checks

Take advantage of new built-in checks, alerts, and tips, which will help you to improve the quality of your data. The new Portfolio Manager looks for data anomalies to help you identify possible typos, incorrect meter entries, missing information, and other common data entry problems.

Expanded Options for Property Type

All property types can use Portfolio Manager to measure and track energy performance. The new tool contains an expanded list of property types – 85 total – offering more specific categorization to facilitate comparison among properties.

Enter Data Using Built-In Wizards

If you are a beginner user or need some assistance, Portfolio Manager has built-in wizards to help you add a property or an energy meter. The tool will help you along the way, asking questions about your data and guiding you through data entry and other actions.

Tips

Tips are provided throughout the tool and contain relevant information and links to help guide you through data entry processes.

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?
Supermarket/Grocery Store
[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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Connect & Share with Others

Connecting with other users and sharing data is easy to do in Portfolio Manager! First, connect with Portfolio Manager users, just like you would in any social networking application. Then, share one building with one user, or multiple buildings with multiple users at one time, with just a few clicks of the mouse - all while specifying which information others can see and modify. You can share your properties, performance documents, and reports with your Portfolio Manager connections.

Plan & Set Goals

The new Portfolio Manager includes tabs specifically for planning and goal setting. These tabs allow you to:

- ✓ Set targets and baselines for your entire portfolio or for individual buildings.
- ✓ Identify properties that reach a particular target.
- ✓ View performance tables with current and baseline performance information and median and target levels.
- ✓ Note other certifications (e.g. LEED, Green Globes).
- ✓ Track your energy projects.

My Properties' Targets & Baselines

Name	Energy Baseline	Water Baseline	Target	Target Met	Action
Federal Building	12/31/2003	09/30/2011	Target ENERGY STAR Score of 80		I want to ...
Higher Campus	Not Available	Not Available	Not Set		I want to ...
Hill Store	07/31/2006	07/31/2006	Target ENERGY STAR Score of 80	✓	I want to ...
Insurance Office	04/30/2007	01/31/2009	Target ENERGY STAR Score of 80		I want to ...
Sunnyside Elementary	08/31/2005	07/31/2006	Target ENERGY STAR Score of 80		I want to ...

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Want this information in a report? Use EPA's standard spreadsheet template to [select properties and export this information from your portfolio](#).

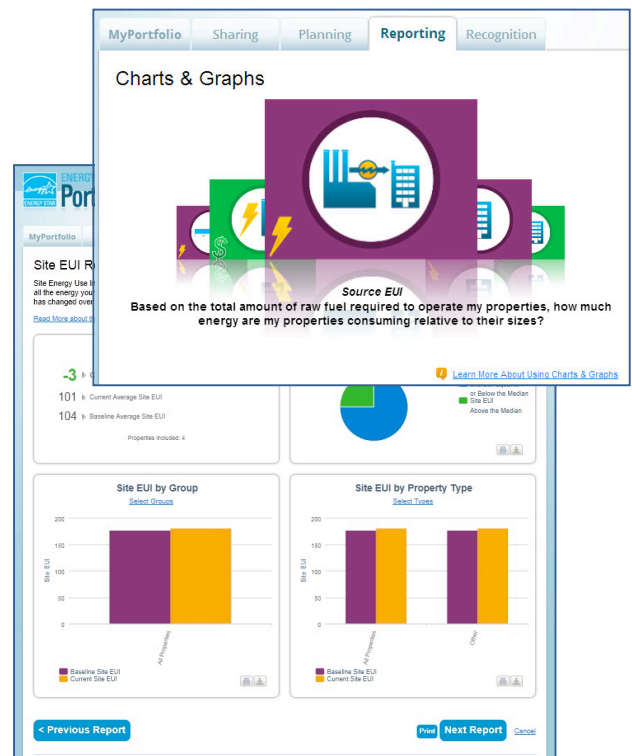
Display Data in Colorful Charts & Graphs

Share your progress with others in your organization with reports, charts, and graphs that are colorful and easy to generate. Portfolio Manager has several built-in report options, as well as functionality to create your own custom reports.

Use New Design Features

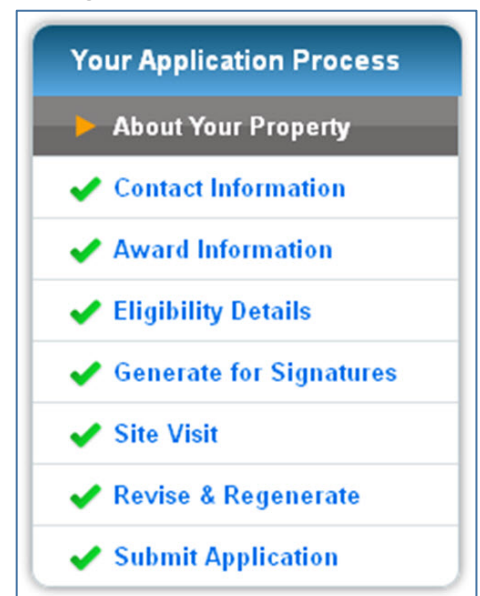
Have you used Target Finder in the past to ensure that your new building designs were energy efficient? Now you can assess your designs using all of the great Target Finder functionality, right within your Portfolio Manager account. Use the new Portfolio Manager design features to:

- ✓ Save energy and property information of your new building design project for future comparison against actual performance.
- ✓ Compare your energy estimates with your design target and the national median for your property type.
- ✓ Compare between estimated, as-designed and actual energy consumption once the property is built and occupied.
- ✓ Generate documentation for “Designed to Earn the ENERGY STAR” recognition.



Apply for the ENERGY STAR Certification

Portfolio Manager includes a widget that helps you track progress through the ENERGY STAR application process. There are prominent notifications on application status and a checklist that shows completed steps. Additionally, you can revise and generate applications without having to contact User Support, and you can submit applications electronically directly from within Portfolio Manager without having to mail them in.



Learn More!

To learn more about Portfolio Manager, visit www.energystar.gov/benchmark.

To get answers to your questions, visit www.energystar.gov/buildingshelp.