

Portfolio Manager® Quick Start Guide

The ENERGY STAR Portfolio Manager tool helps you **measure and track the energy and water use, waste and materials, and greenhouse gas emissions of your buildings, all in a secure on-line environment.** You can use the tool to identify underperforming buildings, set investment priorities, verify efficiency improvements, and receive recognition for superior energy performance. Follow the steps in this guide to get started using the new Portfolio Manager to benchmark your properties, assess performance, and view results.

Add a Property

To get started, log in to Portfolio Manager at portfoliomanager.energystar.gov/pm/login. Then, follow these instructions to create a property and to enter property information.

1. Click **Add a Property** on the **MyPortfolio** tab.
2. Answer questions about your property, and click **Get Started!**
3. Enter basic property information, and select the boxes next to the statements that apply to your property. Then click **Continue**.
4. Enter Use Details such as Gross Floor Area (GFA), operating hours, and number of workers for each type of use. You can use default or temporary values at this time, and enter more accurate data later. **NOTE:** Hover the pointer over the Use Detail to see a definition.
5. Click **Add Property**. When you have successfully added your property, you will see the property's **Summary** tab.

Getting Started

- Step 1. Add a Property
- Step 2. Enter Energy, Water & Waste Data
- Step 3. View Results & Progress

Property Types

All property types can be benchmarked. For properties with multiple buildings, only hospitals, K-12 schools, ice and curling rinks, senior care communities and residential care facilities, and self-storage facilities are eligible to receive the 1 - 100 ENERGY STAR score at a campus level.

Properties With Multiple Use Types

Some properties include multiple use types, such as restaurants in hotels, salons in senior care communities, and cafeterias in hospitals. As a general rule, if a certain use commonly occurs in the type of property being benchmarked, do not make it a separate Property Use Type. Instead, include its area with the building's primary use.

Additional Types of Use

If you have additional types of use on the property, you can add them at any time.

1. Click the property's **Details** tab, and then select a Property Use Type from the **Add Another Type of Use** drop-down menu. Click **Add**.
2. Enter Use Details for the property, and then click **Save Use**.

Enter Energy, Water, and Waste & Materials Data

To receive the most accurate picture of your building's performance, enter how much energy and water your building consumes and the volume of waste and materials that it generates. Follow these steps to enter energy, water, and waste data for your property.

1. Click your property from the **MyPortfolio** tab, then select either the **Energy, Water**, or **Waste & Materials** tab.
2. Click **Add A Meter**.
3. If you create an energy or water meter:
 - a. Select the type of energy or water used and the number of meters to create, and then click **Get Started!**
 - b. Click a meter to enter units and the first bill date. If this meter reflects a bulk fuel purchase for an energy meter, select the **Enter as Delivery?** checkbox.
 - c. Click the blue arrow next to each meter to expand the section on the **Your Meter Entries** page. Click **Add Another Entry** under the meter, and enter the data. Check **Estimation** if you are not entering measured data. You may also choose to record cost here. Once you are finished adding entries, click **Continue**.
 - d. Select the boxes of the meters that total your property's energy or water use on the **Select Meters to Include in Metrics** page. Click **Apply Selections**.
4. If you create a waste meter:
 - a. Select the waste you are tracking and indicate what you do with it. Click **Continue**.
 - b. Indicate how often the material is being collected (regular or intermittent) and the units used for tracking. If prompted, enter the date you started tracking. Click **Create Meter(s)**.

About Your Meters for Municipal Building

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.

1 Energy Meter for Municipal Building (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?	Custom Meter ID 1 Name
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		<input type="checkbox"/>	

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

1 Water Meter for Municipal Building (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Custom Meter ID 1 Name	Custom Meter ID 1 Value
<input type="checkbox"/>	Potable Indoor Meter	Potable Indoor				<input checked="" type="checkbox"/>			

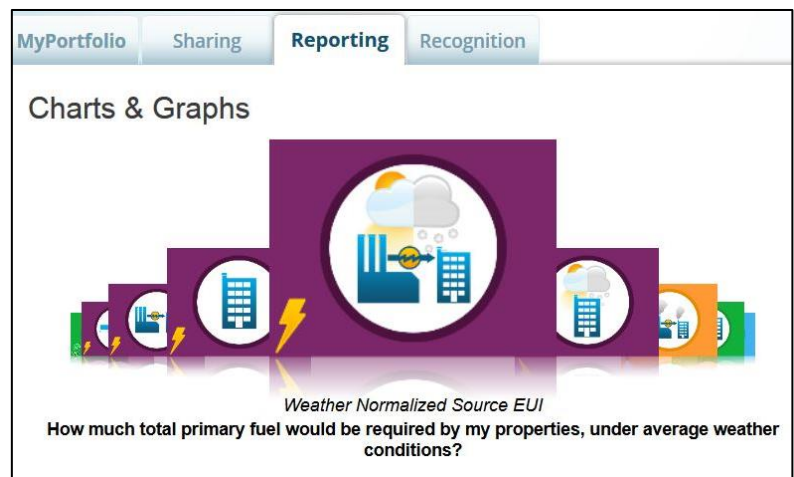
[Delete Selected Entries](#)
[Add Another Entry](#)

- c. Click the blue arrow next to each meter to expand the section on the **Your Meter Entries** page. Click **Add Another Entry** under the meter, and enter the data. Select **Estimation** if you are not entering measured data. You may also choose to record cost and the disposal destination here. Once you have finished adding entries, click **Continue**.
- d. Select the boxes of the meters that total your property's waste and materials on the **Select Meters to Include in Metrics** page. Click **Apply Selections**.

View Results & Progress

It is easy for you to see trends and to track improvement for your entire portfolio of buildings with a variety of standard graphs and reports in Portfolio Manager. Follow these steps to view reports about your properties and to assess progress.

- Click the **Reporting** tab to view graphs and reports for a property or portfolio.
- Click the **Charts & Graphs** options to see colour graphs of how your portfolio or group of properties is performing. You can print the graphs or download the images to incorporate into a presentation or document.
- View the **Templates & Reports** section to see a list of available standard reports, including Performance Highlights, Energy Performance, and Water Performance. Select **Generate New Report** from the **Action** drop-down menu to create a spreadsheet.



Learn More!

To learn more about Portfolio Manager, visit [ENERGY STAR for Buildings](#).
To get answers to your questions, contact [Natural Resources Canada](#).