

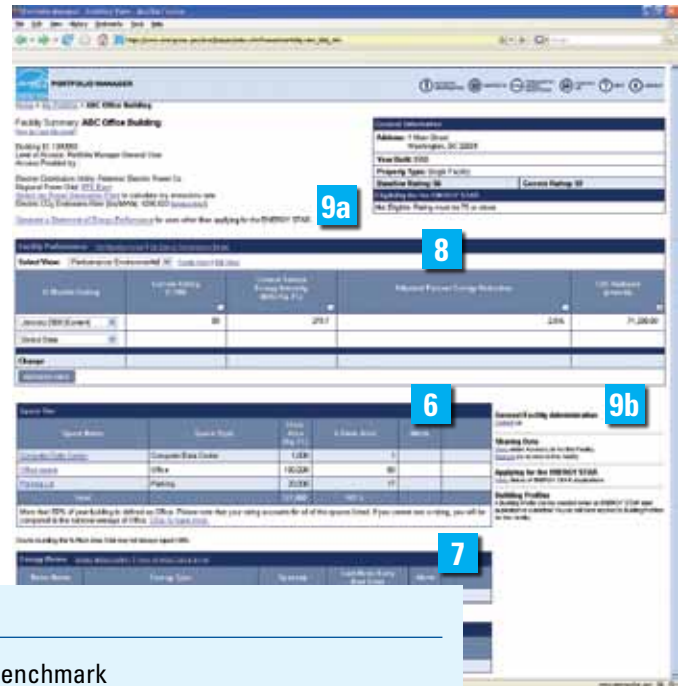


PORTFOLIO MANAGER - QUICK REFERENCE GUIDE

OFFICE BUILDINGS

Rate Your Energy Performance

Use the US EPA's energy performance rating system within Portfolio Manager to rate the energy performance of your office facilities on a scale of 1–100. Rate all of your facilities and update the data regularly to take control of your energy consumption. See top of page two for eligibility and data needed.



USE PORTFOLIO MANAGER STEP-BY-STEP

STEP	ACTIVITY	ACTION
1	Access Portfolio Manager	www.energystar.gov/benchmark
2	Access your account <ul style="list-style-type: none"> Create a new account Login to an existing account 	<ul style="list-style-type: none"> Click REGISTER next to "New User?" Enter user name and password and click LOGIN. From the "Welcome" page, click ACCESS MY PORTFOLIO.
3	Add a new property	Click ADD A PROPERTY on the "My Portfolio" page.
4	Specify property type	Select the appropriate option and click CONTINUE.
5	Enter general building data	Enter all required information and click SAVE.
6	Enter space use data	<p>Go to "Space Use" section and click ADD SPACE.</p> <ul style="list-style-type: none"> Enter a space name, select the space type, and do not change the effective date. Click CONTINUE. Enter all required data. Click SAVE. <p><i>Repeat until all square footage has been accounted for. For more information, see "Helpful Hints" section on the next page.</i></p>
7	Enter energy use data	<p>Go to "Energy Meters" section and click ADD METER.</p> <ul style="list-style-type: none"> Enter meter name, energy type, and units. Answer remaining questions (typically accept all defaults). Click SAVE. Select desired number of meter entries and a start date. Click CONTINUE. Enter energy use. Click SAVE. <p><i>Repeat for all fuel types used in the building.</i></p>
8	Review and interpret results	At the top of the "Facility Summary" page, review your results in the "Facility Performance" section.
9a 9b	Manage account and apply for recognition	<ul style="list-style-type: none"> View your baseline and current ratings, generate a Statement of Energy Performance, set performance targets. Share data, apply for the ENERGY STAR, create a building profile, and perform other administrative tasks.

www.energystar.gov/benchmark
 E-mail: buildings@energystar.gov

ELIGIBILITY CRITERIA






- Fifty percent or more of total building square footage (SF) must be designated as office space. No more than 10 percent of total building SF can be designated as “Other.”
 - * Office buildings, courthouses, medical office buildings—minimum of 5,000 SF
 - * Banks/financial institutions—minimum of 1,000 SF
- Operated a minimum of 30 hours per week
- Occupied for the last 11 months by at least 1 worker, with at least 1 PC

RATING INTERPRETATION

Use your rating to set improvement goals and create an action plan. If your building’s energy performance rating was:

- 1–49** After reducing the load on your building with aggressive low-cost operational changes, you may need to invest in capital equipment to further enhance performance and increase the bottom line.
- 50–74** Significant opportunities to reap savings. Simple, low-cost operations and maintenance practices, combined with equipment upgrades, could yield significant savings.
- 75–100** Gain recognition for your achievements and continue implementing best practices.

HELPFUL HINTS

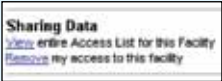
- Office space: input one entry for total gross SF including all supporting functions and common areas such as atria, elevators, stairwells, kitchens, break rooms, storage areas, and administrative areas. Only input more than one office space if operating hours for some office spaces differ by 10 or more hours from the rest of the building. For example, in a 100,000 gross SF office building where a 20,000 SF tenant works 20 hours longer each week than the rest of the building’s tenants, enter two office space entries: Standard Hours (for 80,000 SF) and Extended Hours (for 20,000 SF).
- Parking: input total parking SF based on energy usage. For example, input Enclosed parking SF where energy is used for lighting and mechanical ventilation; Non-Enclosed parking SF where energy is used for lighting; and Open parking SF where energy is used for lighting only at night. Do not leave any cell blank—input zero “0” if necessary.
- Enter at least 12 consecutive months of complete energy data, with no gaps or overlaps between meter entries.
-  **ACCOUNT INFORMATION** Change your password or user profile.
-  **CONTACTS** Maintain contact information for your energy team.
-  **FREQUENTLY ASKED QUESTIONS** View online answers to Frequently Asked Questions.
-  **CONTACT US** Email the system for technical assistance.
-  **HELP** Access online user-support information.

DATA NEEDED

- Building address
- Year built
- Gross floor area
- Operating hours per week
- Number workers on main shift
- Number of personal computers
- Percent of building heated and cooled
- At least twelve consecutive months of energy use and cost data for all fuel types

Cost data is optional and is not used in the calculation of an energy performance rating.

FEATURES

- **Control account access and editing rights.** On the right side of the “Facility Summary” page, go to “Sharing Data” (see [9b](#) on page one). Click **ADD** to delegate access to your property to other users while retaining your access as well. Click **TRANSFER** to assign another user the role of “Building Data Administrator” for your property. 
- **Group facilities within an account.** Organize properties into groups (e.g., by region, by facility type). From the “My Portfolio” page, click **CREATE GROUP**.
- **Generate a Statement of Energy Performance.** Use this resource as a management report and transactional document. Above the “Facility Performance” section of the “Facility Summary” page (see [9a](#) on page one), click **GENERATE A STATEMENT OF ENERGY PERFORMANCE**.
- **Track ratings and eligibility for the ENERGY STAR.** From the “Facility Summary” page, under the “General Information” section (see [9a](#) on page one), check “Eligibility for the ENERGY STAR” and click **APPLY** if applicable.
- **Track Water Meters.** At the bottom of the “Facility Summary” page, click **ADD METER** next to “Water Meters.”



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[www.energystar.gov/
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