

Step 1

Go to Energy Star Web Site : http://www.energystar.gov/index.cfm?cfmc=evaluate_performance.bus_portfoliomanager

Sign In if you have an existing account. If new, register for your Portfolio Manager Account

ENERGY STAR

**SUPERIOR ENERGY MANAGEMENT
CREATES ENVIRONMENTAL LEADERS**
U.S. Environmental Protection Agency

About ENERGY STAR • News Room • FAQs • **KIDS**

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Portfolio Manager Overview

Portfolio Manager is an interactive energy management tool that allows you to track and assess energy and water consumption across your entire portfolio of buildings in a secure online environment. Whether you own, manage, or hold properties for investment, Portfolio Manager can help you set investment priorities, identify under-performing buildings, verify efficiency improvements, and receive EPA recognition for superior energy performance.

How can Portfolio Manager help me?

- ✦ **Manage Energy and Water Consumption for all Buildings**
- ✦ **Rate Building Energy Performance**
- ✦ **Estimate Your Carbon Footprint**
- ✦ **Set Investment Priorities**
- ✦ **Verify and Track Progress of Improvement Projects**
- ✦ **Gain EPA Recognition**
- ✦ **Related Tools**

Manage Energy and Water Consumption for All Buildings

Portfolio Manager helps you track and assess energy and water consumption within individual buildings as well as across your entire building portfolio. Enter energy consumption and cost data into your Portfolio Manager account to benchmark building energy performance, assess energy management goals over time, and identify strategic opportunities for savings and recognition opportunities. [EPA has developed a Benchmarking Starter Kit to help you get started quickly.](#)

Any building can efficiently track and manage resources through the use of Portfolio Manager. The tool allows you to streamline your portfolio's energy and water data, and track key consumption, performance, and cost information

News

- New!** [Winter 2010 Business & Industry Newsletter](#)
- [Celebrating a Decade of ENERGY STAR Buildings](#)
- [2010 ENERGY STAR Awards Ceremony](#)
- [Michigan offers incentives to offset the cost of Professional Engineer verification for ENERGY STAR labeled building certification](#)

Portfolio Manager Login

Username:

Forgot your username?

Password:

Forgot Your Password?

New User? Register

Click here to create your Portfolio Manager login account

Step 2

Fill in your Account Information

Account Information

Please complete the following information to set up your account in Portfolio Manager.

REQUIRED

*Username:

Your password must be between 8 and 32 characters in length (letters and numbers only; no special characters).

*Enter Password:

*Re-Enter Password:

*First Name:

*Last Name:

*E-mail:

Title:

*Organization:

Address:

City:

State:

ZIP Code:

Country:

Phone:

Step 3

Welcome Page for Portfolio Manager Account

The screenshot shows the top navigation bar of the EPA Portfolio Manager website. On the left, there is the Energy Star logo and the text 'PORTFOLIO MANAGER' and 'ENERGY STAR Home'. On the right, there are several navigation icons: 'ACCOUNT INFORMATION', 'CONTACTS', 'FAQ', 'FREQUENTLY ASKED QUESTIONS', 'CONTACT US', 'HELP', and 'LOGOUT'. Below the navigation bar, the main heading is 'Welcome to Portfolio Manager'. Underneath, there is a user profile icon and the text 'Access My Portfolio >'. A red callout box with a pointer to this link contains the text: 'Click here to access your Portfolio Manager information'. Below the callout, there is a checkbox labeled 'Skip this page on next login'. The main content area is divided into two columns. The left column contains a paragraph about EPA's Portfolio Manager, a bulleted list of building types eligible for energy performance rating, and a paragraph about the secure environment provided. The right column has a blue header 'News and Announcements' and contains two sections: 'ANNOUNCEMENT: New! Portfolio Manager Reports' and 'New! New Occupancy Requirements for Office Buildings Applying for the Label'. The 'New! Portfolio Manager Reports' section describes a new reporting feature that allows users to extract and display information about their facilities and their energy performance. The 'New! New Occupancy Requirements for Office Buildings Applying for the Label' section states that based on recent EPA analysis, more office buildings may now be eligible for the ENERGY STAR label.

PORTFOLIO MANAGER
ENERGY STAR
Home

ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Welcome to Portfolio Manager

J@#@#@@ [Access My Portfolio >](#)

Skip this page on next login

You're in good company when you use EPA's Portfolio Manager to manage the energy performance of properties you own, manage, or hold for investment. Thousands of organizations have used Portfolio Manager to benchmark the energy performance of their buildings, track improvement, and apply for recognition from EPA:

- Top-performing buildings can earn the ENERGY STAR, the national symbol for protecting the environment through energy efficiency; and
- Organizations with building portfolios that show a 10%, 20%, 30% (or more) reduction in normalized energy use or achieve a 75 rating average, can earn ENERGY STAR Leaders recognition.

Portfolio Manager provides a secure environment for centralized and decentralized organizations to share facility-specific energy information, with features that allow you to group buildings, view average ratings across a group, control access to building data, and more.

Building Types eligible for energy performance rating include:

- Offices
- Bank/Financial Institutions
- Courthouses
- K-12 Schools
- Hospitals (Acute Care and Children's)
- Hotels
- Retail Stores
- Supermarkets

News and Announcements

ANNOUNCEMENT:

New! Portfolio Manager Reports
EPA is pleased to announce a new reporting feature in Portfolio Manager that allows users to extract and display information about their facilities and their energy performance to assist in prioritizing activities and investments, establishing more robust benchmarks, reporting to other groups, and conducting comparative analysis.

Portfolio Manager Reports allows users to select from eight predefined report templates and to customize reports using a variety of data filters. Report results can be viewed as a data table or graph, and results can be exported in PDF, Excel, XML and CSV format. Portfolio Manager Reports is accessed from the My Portfolio page by clicking on the Generate a Report link. Learn more by reviewing the [Portfolio Manager Reports Quick Reference Guide](#).

New! New Occupancy Requirements for Office Buildings Applying for the Label
Based on recent EPA analysis, more office buildings may now be eligible for the ENERGY STAR label. Any office building with an occupancy rate

Step 4

Add Buildings and Meters to your Account

Click on "Add a Property" to add your buildings and meters

[Home](#) > [My Portfolio](#)

Portfolio Averages	
Baseline Rating: 5 Facilities Included: 1	Current Rating: 44 Facilities Included: 3
Change from Baseline: Portfolio Adjusted Percent Energy Use (%): 0% Facilities Included: 1	
Averages are weighted by Total Floor Space. More about Baselines More about Change from Baseline: Adjusted Energy Use	

[Add](#) a Property
[Import](#) Facility Data Using Templates

Work with Facilities
[Update](#) Multiple Meters
[Share](#) Facilities

Reporting and Analysis
New! [Generate](#) Reports and Graphs
[Request](#) Energy Performance Report

Apply for Recognition
[Apply](#) for the ENERGY STAR
[ENERGY STAR Leaders](#)

Automated Benchmarking
[Get Started Now](#)

[Download](#) in Excel

Results 1 - 11 of 11

Search Facility Name:

All # [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Facility Name <input type="checkbox"/>	Current Rating (1-100) <input type="checkbox"/>	Change from Baseline: Adjusted Energy Use (%) <input type="checkbox"/>	Total Floor Space (Sq. Ft.) <input type="checkbox"/>	Energy Use Alerts <input type="checkbox"/>	Current Energy Period Ending Date <input type="checkbox"/>	Eligibility for the ENERGY STAR <input type="checkbox"/>	Last Modified <input type="checkbox"/>
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Step 5

Enter your Property Information

Add a Property

Property Type

What kind of property would you like to add?

- A single facility for which my organization owns or manages 90% or more of the floor area.
- A portion of a single facility for which my organization owns or manages less than 90% of the floor area.
- A hospital composed of a single facility or collection of facilities.
- A municipal wastewater treatment plant or water treatment and distribution utility
- A campus or other collection of multiple facilities at the same geographic location. [What is this?](#)

CANCEL

CONTINUE


Step 6

Enter your General Facility Information

[Home](#) > [My Portfolio](#) > **Add General Facility Information**

Add General Facility Information

Use the form below to provide general information concerning your facility.

 **REQUIRED**

*Type of Facility:

- A single facility for which my organization owns or manages 90% or more of the floor area.
- A portion of a single facility for which my organization owns or manages less than 90% of the floor area.
- A hospital composed of a single facility or collection of facilities.
- A municipal wastewater treatment plant or water treatment and distribution utility

*Is this facility owned, operated or leased by the Federal government?: [\(what is this?\)](#)

- No
- Yes

*Country:

*Facility Name:

*Address:

*City:

*State:

Step 7

Enter your General Facility Information

Select the Organization that owns this facility:

[Add/Edit Contacts and Organizations](#)

Can leave this field as is

Leave selection as "None"

* Is there an energy efficiency Service and Product Provider assisting with benchmarking this building?

If no SPP is managing data for this facility, select "None". If this facility's SPP is not displayed, [Add/Edit Contacts and Organizations](#) to add the facility's SPP to the drop-down menu.

Notes:

This field is optional and can be used to record any information (up to 1000 characters) pertaining to this facility.

CANCEL

SAVE

Step 8

Your General Facility Information Is Now Established

Scroll down to Energy Meters section to add your Meters

[Home](#) > [My Portfolio](#) > **Cooling Plant**

Facility Summary: **Cooling Plant**

[How do I use this page?](#)

Building ID: 1993691
 Level of Access: Building Administrator

Electric Distribution Utility: Avista Corp
 Regional Power Grid: [WECC Northwest](#)
[Select my Power Generation Plant](#) to calculate my electric emissions rate
 Electric Emissions Rate (kgCO₂e/MBtu): 120.6 ([what is this?](#))

General Information Edit	
Address: E. 1401 , Spokane, WA 99220	
Year Built: 2001	
Property Type: Single Facility	
Baseline Rating: N/A	Current Rating: N/A
<input type="checkbox"/> View Period Ending Dates	
Water Period Ending Dates Current: N/A Baseline: N/A	Energy Period Ending Dates Current: N/A Baseline: N/A
Eligibility for the ENERGY STAR	
N/A	

Facility Performance Set Baseline Periods Set Energy Performance Target				
Select View: Performance: Environmental Create View Edit View				
12 Months Ending	Current Rating (1-100) i	Current Source Energy Intensity (kBtu/Sq. Ft.) i	Change from Baseline: Adjusted Energy Use (%) i	Change from Baseline: GHG Emissions (MtCO ₂ e) i
Select Date ▼				
Select Date ▼				
Change				
REFRESH VIEW				

Step 9

Establish Meter Information

You can create Space Information for your own information, but we will NOT use it

Space Use Add Space					
Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	
No Space Defined					

Due to rounding, the % Floor Area Total may not always equal 100%.

Energy Meters Add Meter Update Multiple Meters View All Meter Data in Excel					
Meter Name	Energy Type	Space(s)	Last Meter Entry (End Date)	Alerts	
No Meter Defined					

Click on 'Add Meter' for each electric and gas meter supplying energy to the building

Water Meters Add Meter View All Meter Data in Excel					
Meter Name	Units	Use	Last Meter Entry (End Date)	Alerts	
No Meter Defined					

Renewable Energy Certificates Add REC							
Provider	Avoided GHG Emissions (MtCO2e)	Generation Facility ID	Generation Facility Name	Period of Generation	Fuel Type	Quantity (MWh)	Action
No Renewable Energy Certificates Defined							

General Facility Administration

[Track](#) Energy Performance Improvements
[Delete](#) this Facility from Portfolio Manager
[Contact](#) us

Sharing Data

[Add](#) user to share this Facility
[Modify](#) list of users
[Transfer](#) Facility to another user
[View](#) entire Access List for this Facility

Applying for the ENERGY STAR

[Apply](#) for the ENERGY STAR
[View](#) status of ENERGY STAR Applications

Building Profiles

A building Profile can be created when an ENERGY STAR label application is submitted

Step 10

Enter your Meter Information

[Home](#) > [My Portfolio](#) > [Cooling Plant](#) > **Add Meter**

Add Facility Energy Meter: Cooling Plant

To add a meter, enter the name and select the appropriate characteristics for the meter.

If you are entering temporary values for energy data, please indicate so by selecting "Yes" and entering the date range the values will be considered as temporary.

*** REQUIRED**

Add Energy Meter

***Enter the Meter Name:**

***Apply this meter to the following (check all that apply):**

Entire facility

Select the Meter Type:

***Energy Type:**

***Units:**

***Add this Meter to Total Facility Energy Use?**

Yes, calculate this facility's total energy use by including this meter

No, adding this meter to this facility's total energy use will inflate the actual value

Is this meter currently active?

Yes No

This must be your Avista meter number which is on the face of the meter and also on the customer bill .

Select Electricity or Natural Gas

Select KWH or Therms


Step 11

Do not enter Meter data here – Avista will provide latest 12 months usage

[Home](#) > [My Portfolio](#) > [Cooling Plant](#) > **Add Meter Entries**

Add Meter Entries: 12345678

Please select the number of meter entries to add, enter the start date for these meter entries, and select Continue. If you do not wish to add meter entries to this meter at this time, select "Do Not Add Meter Entries"

 **REQUIRED**

Select Number of Meter Entries to be added and Start Date for first entry:

Meter Entries to Add	Start Date (MM/DD/YYYY)	Energy Type	Units
<input type="text" value="12"/> Month(s)	<input type="text"/>	Electricity	kBtu (thousand Btu)

DO NOT ADD METER ENTRIES **CONTINUE**

Click on this button

Step 12

Go to Automated Benchmarking to choose Avista as your Energy Service Provider

To get to this page, click on the **My Portfolio** link on any page

[Home](#) > [My Portfolio](#)

Portfolio Averages	
Baseline Rating: 5 Facilities Included: 1	Current Rating: 44 Facilities Included: 3
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Averages are weighted by Total Floor Space. More about Baselines More about Change from Baseline: Adjusted Energy Use	

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Automated Benchmarking
[Get Started Now](#)

Click on "Get Started Now" to choose Avista as your ESP

GROUP: [Create Group](#) | [View All](#) VIEW: [Create View](#) | [Edit View](#) | [View All](#)

[Download](#) in Excel Search Facility Name:

Results 1 - 11 of 11 All # [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Facility Name <input type="checkbox"/>	Current Rating (1-100) <input type="checkbox"/>	Change from Baseline: Adjusted Energy Use (%) <input type="checkbox"/>	Total Floor Space (Sq. Ft.) <input type="checkbox"/>	Energy Use Alerts <input type="checkbox"/>	Current Energy Period Ending Date <input type="checkbox"/>	Eligibility for the ENERGY STAR <input type="checkbox"/>	Last Modified <input type="checkbox"/>
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Step 13

Select Avista Utilities as your Energy Service Provider

Automated Benchmarking Service Console

Automated benchmarking allows an energy service provider to transfer data to your account *automatically*. To start this service you can *either* select an organization that already provides you with energy related services (**Option 1**) or contact an automated benchmarking provider in order to inquire about their services (**Option 2**). You can have multiple providers and can assign providers to individual buildings and meters, as appropriate for your portfolio.

Option 1: Select Your Current Provider *

Select an Energy Service Provider

Option 2: Inquire About New Services

[Contact an automated benchmarking provider](#)

Select 'Avista Utilities' in the drop down list and click the ADD button

Learn More About Automated Benchmarking

What is automated benchmarking? Automated benchmarking allows authorized energy service providers to transfer data into your account automatically. Energy service providers offering this service range from energy service companies to utilities to regional energy efficiency programs. Different providers offer different services including:

- Managing all the building and energy data in your account
- Updating one or more meters with energy use data
- Providing energy performance ratings in their proprietary energy information products

All of these services save you time and effort by reducing or eliminating manual data entry. You may select more than one service provider to manage your data.

How do I get started? Ask your energy service provider if they offer automated benchmarking that includes the services you need. If they do, authorize them to access your account using the Select Your Current Provider control on this page. Depending on your provider's services, Portfolio Manager may ask you for additional information about the buildings and meters in your account.

Larger organizations may also consider implementing automated benchmarking with their own internal facility and energy information tracking systems without using a third-party service provider. [Review the documentation](#) on automated benchmarking to determine if this is the right approach for your organization.

What can I expect from automated benchmarking? When you add a new provider, Portfolio Manager sends a request to them on your behalf to authorize them to begin transferring data to your account. Talk to your provider about how often you should expect updates.

Return to this screen to check the status of your automated benchmarking providers. Depending on the version of automated benchmarking your provider is using, status for each of your providers may be shown, along with a log detailing the history of all their recent transactions in your account.

Step 14

Check the Building AND Meters you are authorizing Avista to send usage to Energy Star

[Home](#) > [My Portfolio](#) > [ABS Select Buildings and Meters](#)

Select Buildings and Meters to Authorize

Select buildings and/or meters you authorize Avista Utilities to access. You may return to this screen at any time to change these selections. Please note that de-selecting a building or meter after your service provider has successfully connected to it will remove their ability to provide data for it altogether.

Select the Buildings and/or Meters You Authorize Your ESP to Provide Data

<input type="checkbox"/> Select All	Authorized Energy Service Provider	Date Authorized (Authorized By)
<input type="checkbox"/> Sample Facility		
<input type="checkbox"/> Sample Meter (Electricity)		

Check the Building and the Meters you are authorizing Avista to provide usage data for.

Step 15

Enter Information Required By Avista so can communicate with you.

[Home](#) > [My Portfolio](#) > **ABS Information Required by Your ESP**

Information Required by Your ESP

Avista Utilities has requested that you provide additional information to complete this request. If you have any questions regarding how to provide this information, please contact:

Avista Utilities
Commercial Account Rep
[Email](#)

[<< BACK](#) [CONTINUE >>](#)

Answer Your ESP's Questions About Your Account

Phone Number *
Example: 5091234567
Phone number of building owner
Numeric; Between 1 and 10 characters

Email Address *
Example: john.smith@comcast.net
Email address of building owner
Between 1 and 50 characters

Last Name *
Example: Smith
Last Name of Building Owner
Between 1 and 30 characters

First Name *
Example: John
First name of building owner
Between 1 and 30 characters

[<< BACK](#) [CONTINUE >>](#)

Step 16

Congratulations, you are all done. At the bottom, you will see Avista Utilities as your Provider and the status of your request.

Authorization for Avista Utilities updated.

Automated Benchmarking Service Console

Automated benchmarking allows an energy service provider to transfer data to your account *automatically*. To start this service you can *either* select an organization that already provides you with energy related services (**Option 1**) or contact an automated benchmarking provider in order to inquire about their services (**Option 2**). You can have multiple providers and can assign providers to individual buildings and meters, as appropriate for your portfolio.

Option 1: Select Your Current Provider *

Select an Energy Service Provider

Option 2: Inquire About New Services

[Contact an automated benchmarking provider](#)

Learn More About Automated Benchmarking

[About Automated Benchmarking](#)
[Service Providers that Offer Automated Benchmarking](#)

If you need to change your authorizations, click on this link.

Existing Providers

[Show Activity Log](#)

Provider	Energy Service Provider Status	Buildings Authorized for Automated Benchmarking
Avista Utilities Commercial Account Rep Ts & Cs Email	Connection to ESP Requested - Awaiting ESP Response View	1 Buildings Change Authorization