

ENERGY STAR's Portfolio Manager® Quick Guide

ENERGY STAR Portfolio Manager® is a free online tool used to track building performance by measuring its energy and water use. Simply enter operational use details and monthly utility bills, including electricity, natural gas, and water/sewer. This tool is used by Grants to Green to track the progress of your buildings performance as a result of energy and water efficiency projects, informing the program and the funder of the results of the grant.

When accepting a grant award, you, the grantee, are required to establish an ENERGY STAR Portfolio Manager® account and enter monthly utility bills for the duration of the grant period. This Quick Guide provides simple steps to –

1. **Create an account**
2. **Share an account**
3. **Setup your building**
4. **Enter monthly utility bills**

Completion of all four steps is required before scheduling your energy and water assessment.

Before starting, it is important to gather the following pieces of information:

Basic building information, including:

- Building name
- Building address
- Building type
- Year built
- Total square footage

Building use information, including:

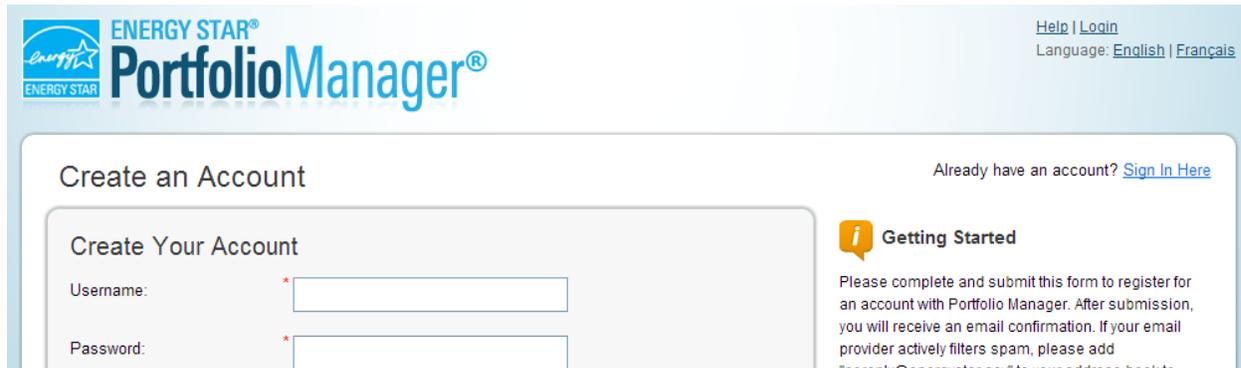
- Operating hours
- Number of workers
- Square footage breakdown by general space type
- Building picture and narrative of general operations

Locate the following **utility bill information**:

- 12 most recent consecutive months of electric, natural gas, and water/sewer bills (minimum)
- Account numbers for each electric, natural gas, and water account/meter
- Service start date, service end date, use and cost for each month
- Utility use units for each electric, natural gas, and water account/meter
 - Electric typically in kWh
 - Natural gas typically in therms CCF, or MBtu
 - Water/Sewer typically in gallons, CCF, thousand gallons (k gallons)

Step 1. Create an Account

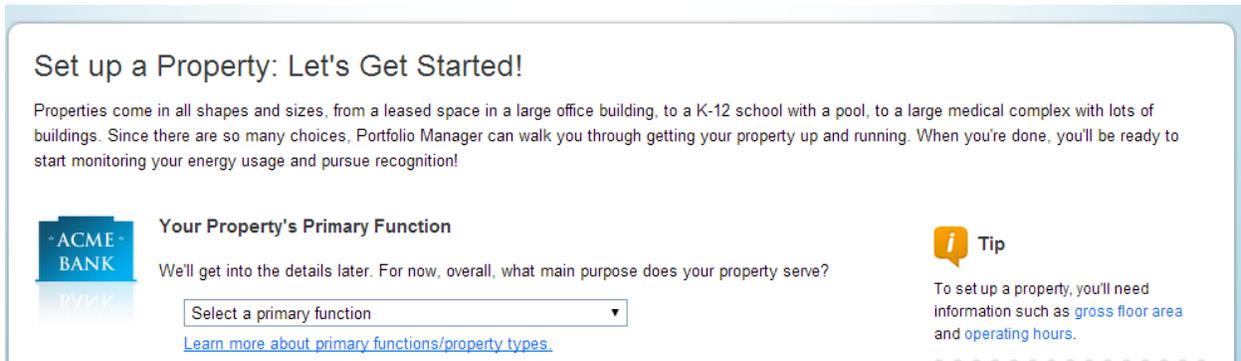
1. To get started, create an account at <https://portfoliomanager.energystar.gov/pm/signup>. Establish a username, password, and other information about yourself and your organization and click **Create My Account**.



The screenshot shows the 'Create an Account' page of the Energy Star Portfolio Manager. At the top left is the Energy Star logo and 'PortfolioManager' text. At the top right are links for 'Help | Login' and 'Language: English | Français'. The main heading is 'Create an Account', with a link 'Already have an account? Sign In Here' to the right. Below the heading is a 'Create Your Account' form with fields for 'Username:' and 'Password:'. To the right of the form is a 'Getting Started' tip box with an information icon and text: 'Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "energy@energystar.gov" to your address book to...'

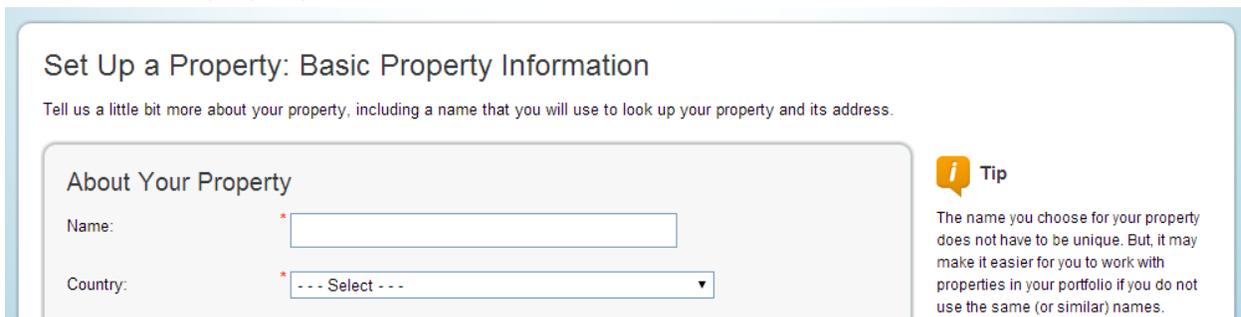
2. To set up a property...

- a. Click **Add a Property** on the **MyPortfolio** tab, answer questions about your property, and click **Get Started!**



The screenshot shows the 'Set up a Property: Let's Get Started!' page. It features a heading and introductory text: '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!'. Below this is a section titled 'Your Property's Primary Function' with a placeholder image of 'ACME BANK'. The text asks: 'We'll get into the details later. For now, overall, what main purpose does your property serve?'. There is a dropdown menu labeled 'Select a primary function' and a link: 'Learn more about primary functions/property types.'. To the right is a 'Tip' box with an information icon and text: 'To set up a property, you'll need information such as gross floor area and operating hours.'

- b. Enter basic property information and click **Continue**.



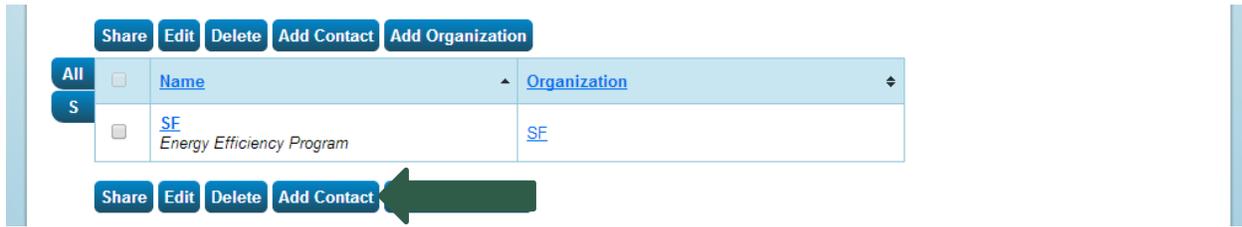
The screenshot shows the 'Set Up a Property: Basic Property Information' page. It has a heading and text: 'Tell us a little bit more about your property, including a name that you will use to look up your property and its address.'. Below is a section titled 'About Your Property' with a placeholder image of 'ACME BANK'. There are two fields: 'Name:' with a text input field and 'Country:' with a dropdown menu showing '--- Select ---'. To the right is a 'Tip' box with an information icon and text: '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.'

- c. Enter use details for the property and click **Add Property**. If necessary, use default or temporary values and enter more accurate information later. Hover your mouse over the **Property Use Detail** to see definition.

Proceed to Step 2 to share your account with Southface and the Community Foundation.

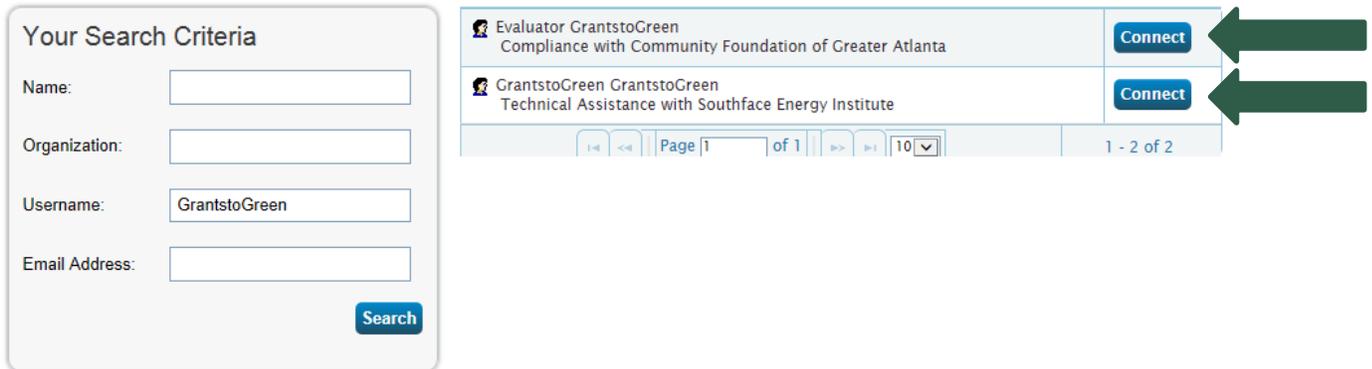
Step 2. Share an Account

1. To connect and share your account with Grants to Green staff click on [Contacts](#) at the top right corner of your screen then click **Add Contact**.

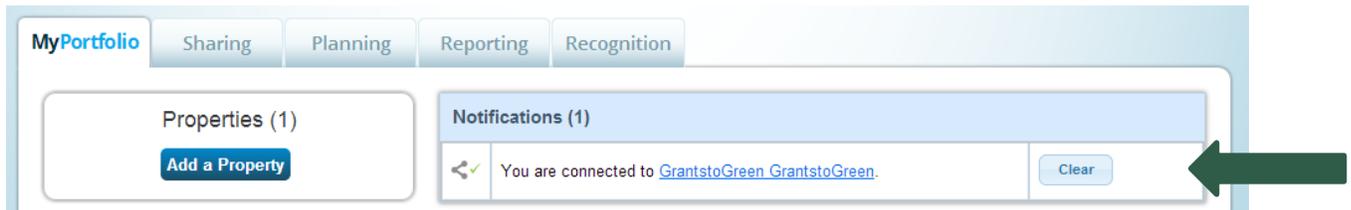


2. In the **Find Contact in Portfolio Manager** section, search for username **GrantstoGreen** and click **Search**.

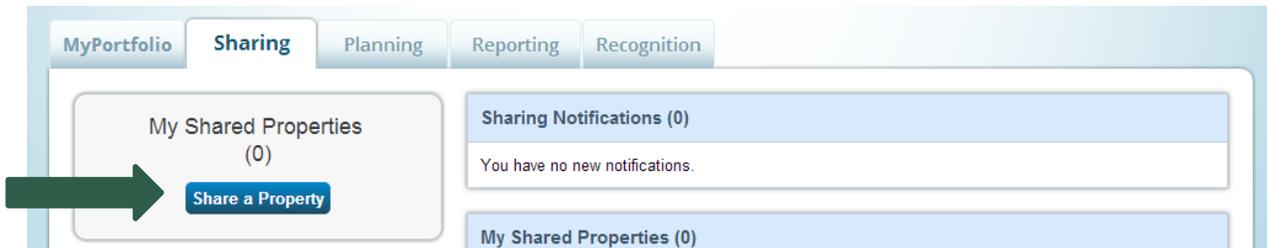
3. Click **Connect** on both GrantstoGreen (Southface) and Evaluator (Community Foundation)



4. A connection request has been sent to each contact (GrantstoGreen and Evaluator). Each contact must now accept the connection in order to proceed to the next step. You will receive a notification confirming the connection.



5. To share the property, click on the **Sharing** tab from the main page and click **Share a Property**.



6. From the drop down menu, select one property, your property, and share with GrantstoGreen and Evaluator, and click **Continue**.
7. Give **Full Access** permission to both contacts and click **Share Property (ies)**. You will receive a notification when each contact has accepted the share.

Proceed to Step 3 to setup your building.

Step 3. Setup your Building

1. To get started, log in to Portfolio Manager to access your property account at <https://portfoliomanager.energystar.gov/pm/login.html> and click on the [name of your property](#) under Properties.
2. To authenticate a property...
 - a. Create the property profile by uploading building photo and providing a profile narrative under **MyPortfolio** tab > **Summary Tab** > **Create Profile**
 - b. Verify or add another type of use under **MyPortfolio** tab > **Details Tab** > **This Property's Overall Use**
 - c. Enter previously completed energy- and water-saving projects under **MyPortfolio** tab > **Goals Tab** > **Energy Projects**
3. Set up a property's meters under **MyPortfolio** tab > **Meters Tab** > **Add Another Meter**

The screenshot shows the 'MyPortfolio' interface with the 'Meters' tab selected. The top navigation bar includes 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. The main content area shows building details: 'My Building Name', '123 Green Street, Atlanta, GA 30308', 'Portfolio Manager Property ID: 4096308', and 'Year Built: 1988'. A 'Weather-Normalized Source EUI (kBtu/ft²)' box displays 'Current EUI: N/A' and 'Baseline EUI: N/A'. Below this, there are tabs for 'Summary', 'Details', 'Meters', 'Goals', and 'Design'. The 'Meters' tab is active, showing 'Energy Meters (0)' and a 'View as a Diagram' link. A 'Manage/Enter My Bills' button is visible on the left, and an 'Add Another Meter' button is on the right, highlighted by a green arrow.

4. Select your property's energy (electricity, gas, etc.) and water (indoor, outdoor, etc.) meters and click **Get Started!**

The screenshot shows the 'Sources of Your Property's Energy' form. It asks 'What kind of energy do you want to track? Please select all that apply.' The 'Electric' option is checked, and 'purchased from the grid' is also checked. There is a 'How Many Meters?' input field. Other options are 'generated on site with my own solar panels' and 'generated on site with my own wind turbines'. To the right, there is a 'Tracking Energy' section with an information icon and text: '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...'

5. Finish adding meters to your property:
 - a. Click on the **Meter Name** box and format the meter name to include the utility provide name and account number, for example: Georgia Power – 12345-6789
 - b. Select the appropriate **Units** for each meter:
 - Electric typically in kWh
 - Natural gas typically in therms CCF, or MBtu
 - Water/Sewer typically in gallons, CCF, thousand gallons (k gallons)
 - c. Enter the **Date Meter became Active**. If necessary, use the date the building was built.
 - d. Click **Continue** and on the following page, click **Finish Meter Set Up**.

About Your Meters for My Building Name

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.

2 Energy Meters for My Building Name (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"/>	Georgia Natural	Natural Gas		therms	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	Georgia Power - 123	Electric - Grid		kWh (thousand Watt-hours)		<input checked="" type="checkbox"/>		<input type="checkbox"/>

- e. Check the boxes for the meters that account for the property's total energy and water usage and click **Apply Selections**.

Meters to add to Total Consumption for Metrics for My Building Name

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 checked="" type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	Georgia Power - 123
<input checked="" type="checkbox"/>	Georgia Natural Gas

Total of 2 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 checked="" type="checkbox"/>	Meter Name
<input checked="" type="checkbox"/>	City of Atlanta Water

Total of 1 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



Proceed to Step 4 to enter 12 most recent consecutive months of utility bills.

Step 4. Enter Monthly Utility Bills

1. To get started, log in to Portfolio Manager to access property account at <https://portfoliomanager.energystar.gov/pm/login.html> and click on the **name of your property** under Properties.
2. Enter a property's meters under **MyPortfolio** tab > **Meters** Tab
3. Choose a utility meter, click on the Action drop-down menu, and select **View/Add Bills (i.e. meter consumption)**.

MyPortfolio | Sharing | Planning | Reporting | Recognition

Southface- Main Campus
 241 Pine Street NE, ATLANTA, GA 30308 | [Map It](#)
 Portfolio Manager Property ID: 3531232 | Primarily: Office
 Year Built: 1996

Apply for ENERGY STAR Certification

ENERGY STAR Score (1-100)
 Current Score: 97
 Baseline Score: 93

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

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

Meters for Performance Metrics
[View/Edit Configuration](#)

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

Name	Energy Type	Most Recent Bill Date	Action
Electricity - Combined	Electric - Grid	02/05/2014	I want to... I want to... Edit Basic Meter Information View/Add Bills (i.e. meter consumption) Delete Meter
Resource Center- Propane	Propane	01/31/2014	

4. To add a monthly bill entry, locate the Start Date, End Date, Usage, and Cost on the monthly utility bill, click **Add Another Entry** at the bottom of the page, enter the information in the respective empty cells, and click **Save Bills**. (tip: ignore the Estimation and Green Power boxes; ensure correct Usage units are entered)

Electricity - Combined [Select Meter](#) ⓘ These are your already created meters. Do you need to [Add another meter](#)

Display Year(s): 2014 x

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Cost (\$)	Estimation	Green Power	Last Updated
<input type="checkbox"/>	12/6/2013	1/6/2014	8642	1211	<input type="checkbox"/>	<input type="checkbox"/>	2/24/2014 Atlanta Local BBC Account
<input type="checkbox"/>	<input type="text" value="01/07/2014"/>	<input type="text" value="02/05/2014"/>	<input type="text" value="9002"/>	<input type="text" value="1261"/>	<input type="checkbox"/>	<input type="checkbox"/>	2/24/2014 Atlanta Local BBC Account

[Delete Selected Entries](#) ⓘ You can upload an excel spreadsheet with your basic bill information using our [spreadsheet template](#). No file chosen

[Add Another Entry](#)

ⓘ Did you know you can work with another organization to regularly upload your data into Portfolio Manager? You can authorize these companies to update your meters, manage building data, and retrieve metrics. To get started, [search for organizations that exchange data](#).

[Close](#)

Note: To delete a bill entry, check the entry box on the left, click **Delete Selected Entries** at the bottom of the page, and click **Save Bills**. To edit a bill entry, click anywhere on the entry row, modify the appropriate cells, and click **Save Bills**.

Congratulations! Now that you have created an account, shared it with Southface and the Community Foundation, setup your building and entered 12 most recent consecutive months of utility bills, you have successfully established an ENERGY STAR's Portfolio Manager® account. Remember, when accepting a grant award, you, the grantee, are required to enter monthly bills for the duration of the grant period.