

ENERGY STAR® Portfolio Manager®: What's New?

The simple choice for energy efficiency.



September 2017

EPA's ENERGY STAR Portfolio Manager is a no-cost tool that empowers users to track energy, water, waste, and recycling across an entire portfolio of buildings. Portfolio Manager hosts time-saving tools and calculators that provide key performance indicators for energy, water, greenhouse gas emissions, cost, and waste over time. Portfolio Manager also provides the 1—100 ENERGY STAR score for eligible building types. EPA regularly adds new features and capabilities to Portfolio Manager in response to user demand.

Here's an overview of the most recent upgrades to Portfolio Manager:

Updated Dashboard:

Log into your Portfolio Manager account and get an at-a-glance overview of your portfolio's performance directly from the MyPortfolio Dashboard! Choose which metrics are most important to you and your buildings through customized "Portfolio Views" and create different views to toggle between.

The screenshot shows the ENERGY STAR Portfolio Manager dashboard. At the top, there are navigation tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. Below this, there are sections for 'Properties (20)' and 'Source EUI Trend (kBtu/ft²)'. The main area displays a 'Dashboard' with a table of properties. A red circle highlights the 'Energy Highlights' dropdown menu in the table's header. Below the table, there is a 'Create a Portfolio View' dialog box with three steps: 1. Name Your View, 2. Select Timeframe, and 3. Select Information & Metrics. A red arrow points from the 'Energy Highlights' dropdown to the 'Using Views to See Metrics' tip in the dialog box.

Name	Energy Current Date	ENERGY STAR Score	Site EUI (kBtu/ft²)	Source EUI (kBtu/ft²)
Example Warehouse 5691801	04/30/2016	96	7.3	10.4
Test office and warehouse 4065510	06/30/2016	94	25.2	79.2
TEST - 3865 Wilson Blvd 4137911	04/30/2015	68	61.8	194.1
Test Office Building 5034514	06/30/2016	64	89.8	282.0
Sample Office (US) 5927489	03/31/2017	48	95.8	264.4
Sample Office (US) 5927484	03/31/2017	48	95.8	264.4
Sample K-12 School (US) 5927491	03/31/2017	2	118.3	290.0
Sample K-12 School (US) 5927486	03/31/2017	2	118.3	290.0
Sample Library (US) 5927483	03/31/2017	NA	106.7	245.0

The screenshot shows the 'Select Information & Metrics' dialog box. It has a sidebar with categories like 'Property Information', 'Property ID Numbers', 'Property Use Details', 'Energy Use by Fuel Source', 'Data Accuracy', 'Energy Performance Metrics', and 'Water Performance Metrics'. The main area lists various metrics with checkboxes. A red circle highlights the 'Annual Demand Cost (\$)' metric. Another red circle highlights the 'Annual Maximum Demand (kW)', 'Annual Maximum Demand (MM/YYYY)', and 'Annual Maximum Demand (Meter Name (Meter ID))' metrics.

Start Date	End Date	Usage (thousand kWh-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Updated
12/1/2013	1/1/2014	532,173	36,912.96			1,293.48	13,304.33	8/7/2017 Sample Data_Demand
1/1/2014	2/1/2014	518,833	36,912.49			1,281.05	12,970.83	8/7/2017 Sample Data_Demand

Track Electric Demand:

Track your monthly electric demand in Portfolio Manager! Many utilities establish billing rates based on a property's period of highest demand relative to their own peak generation demand. So, by tracking and understanding your building's demand, you can take advantage of this timing to lower your energy costs.

How does it work? Input 12 months of electric demand data and Portfolio Manager will calculate "Annual Demand Cost" and "Annual Maximum Demand" for your property.

ENERGY STAR® Portfolio Manager®: What's New?

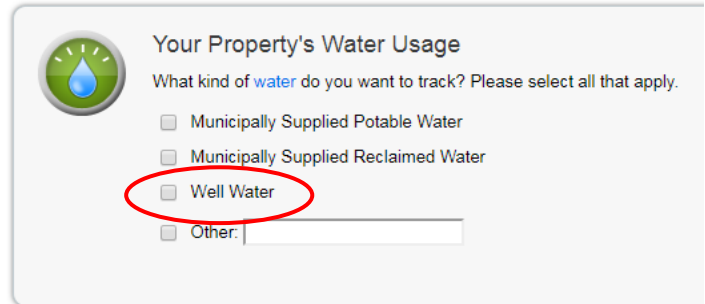
The simple choice for energy efficiency.



September 2017

Well Water Meter Type:

If your property uses well water, now you can track that usage through a separate meter type in Portfolio Manager. Created by combining the previously existing “Alternative Water Generated Onsite” and “Other Water Sources” meter types, the new Well Water meter type allows more accurate reporting of on-site water use.



Create a Custom Download

Whether you have entered one year or ten year's worth of data, you can export your raw data to Excel to see it in one consolidated place. Take a look at an [example download](#) to get a feel for what is included.

Use the form below to choose exactly what data you need to download.

1 Select Properties to Include

Properties:

2 What type of data do you want to include?

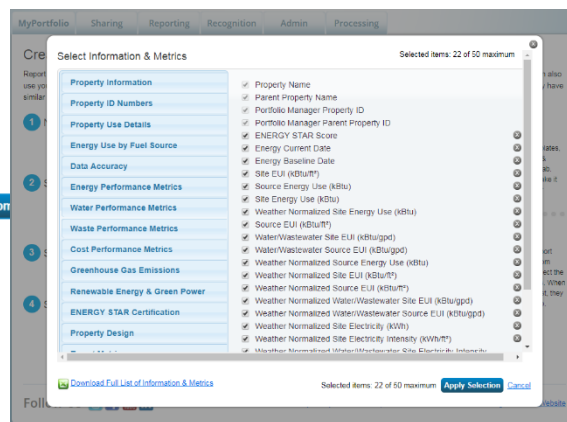
- Basic Property Information
 - Download basic property information such as name and address
- Property IDs
 - Download property IDs (e.g. Custom IDs, Standard IDs)
- Uses
 - Download which uses are at each property (e.g. Office)
- Use Details
 - Download the values entered for your use details (e.g. Weekly Operating Hours)
- Meters
 - Download basic information such as name, units and dates when the meter was in use
- Meter Entries
 - Download individual meter entries you have entered
- Energy Projects
 - Download information about energy projects
- Design Data
 - Download design data entered for each property
- Target and Baseline
 - Download energy target and energy, water and waste baselines for each property

7 Download Size Limits

There is a limit of 50,000 rows of data for each spreadsheet download. If you have a lot of data, you may have to download your data in batches instead of all in one file. Make selections on the left to see the number of rows.

Custom Report Downloads:

New custom reports give you the flexibility to specify exactly which metrics and portfolio data you want to download. Whether you have a large or small portfolio, by selecting the metrics that are most important to you, as well as the order they appear, you can now generate more user-friendly and meaningful reports.



Mass Sharing for Web Services:

Share your entire portfolio with a utility or energy service company to receive your data automatically. Previously, Portfolio Manager only allowed you to share individual properties with web services providers, but now with mass sharing capabilities, you have access to a much more efficient way to exchange property data!

Share Properties for Exchanging Data



Sometimes it's really important to be able to share your property with someone else. Use this option to set up automatic exchange of data with your utility or service provider.

1 Select Web Services Provider (Account)

Which web services provider (account) do you want to share these properties with in order to exchange data? You can share multiple properties at once with a single provider.

Select web services provider from my contacts book:

Unlike "regular sharing," when you "bulk share" with a Web Service Provider, you can only pick one provider. This is because the bulk share depends on the requirements/settings of the provider.

2 Select Properties

Which Properties do you want to share? Note that while you can share properties that include unsupported meter types, those specific meters will not be shared.

Select Number of Property(ies):

If you only need to choose one permission (because you are doing a single share or you want to set the same permissions for all your shares), you can choose that permission here. Otherwise, you may assign different permissions for different properties and/or contacts on the next screen.

- I want to set permission levels in bulk for all selected properties and meters.
- I want to provide different levels of access for each property or to each individual meter within a property.