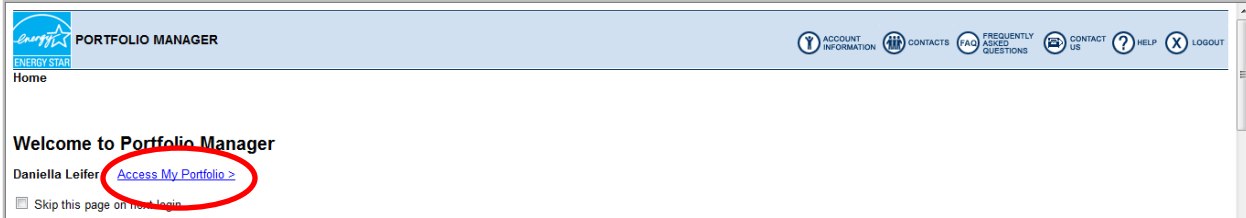


PM TIP SHEET/HOW TO NAVIGATE PM WEBSITE

Portfolio Manager direct shortcut: <http://www.energystar.gov/benchmark>

Log in to your account on this page.

After logging in, the initial page is the **Home Page**, which contains a link to “Access My Portfolio” (red oval).

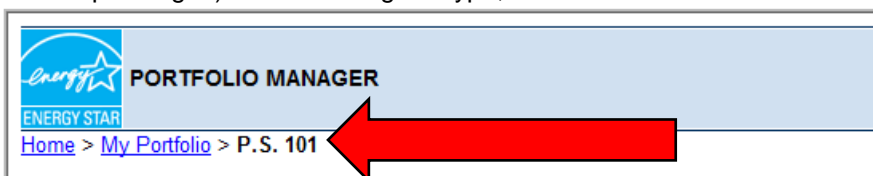


Clicking “Access My Portfolio” brings you to the **My Portfolio page**. This page lists all of the buildings in your portfolio (red brackets). Note that you will only have one sample building listed when you log in for the first time. This page also has a list of different functions that you can choose from (green brackets):

The screenshot shows the 'My Portfolio' page. At the top left is the Energy Star logo and 'PORTFOLIO MANAGER'. Below it is 'Home > My Portfolio'. A navigation bar contains icons for ACCOUNT INFORMATION and CONTACTS. The main content area is divided into two sections. The top section, 'Portfolio Averages', shows 'Baseline Rating: 75' (Facilities Included: 2) and 'Current Rating: 78' (Facilities Included: 2). Below this is 'Change from Baseline: Portfolio Adjusted Percent Energy Use (%): -4.5%' (Facilities Included: 2). A note states 'Averages are weighted by Total Floor Space.' with links for 'More about Baselines' and 'More about Change from Baseline: Adjusted Energy Use'. The bottom section is a table of buildings. A green bracket on the right side groups several links: '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), and 'Automated Benchmarking' (Get Started Now). The table has columns: Facility Name, Current Rating (1-100), Change from Baseline: Adjusted Energy Use (%), Total Floor Space (Sq. Ft.), Energy Use Alerts, and Current Energy Period Ending Date. The table lists three sample buildings: 'Sample Multifamily Building' (N/A, N/A, 0, Less than 1 year of data), 'Sample NYC Office Building' (79, -4.6, 515,000, 12/31/2010), and 'Sample School Facility' (N/A, N/A, 60,000, Not El). A red bracket on the left side groups the building names. A 'Download in Excel' link is at the bottom left.

Facility Name	Current Rating (1-100)	Change from Baseline: Adjusted Energy Use (%)	Total Floor Space (Sq. Ft.)	Energy Use Alerts	Current Energy Period Ending Date
Sample Multifamily Building	N/A	N/A	0	Less than 1 year of data;	
Sample NYC Office Building	79	-4.6	515,000		12/31/2010
Sample School Facility	N/A	N/A	60,000		Not El

When you click on your building, it opens up to a new page where you can access your building’s space use data and energy use data. To navigate between pages, look at the top of the screen where you will see which page you are on and where you can click back and forth between pages (ie. Home, My Portfolio). In the example below, you are on your **Individual Facility page**. You can determine this because the page name (which the red arrow is pointing to) is in black regular type, not blue:



If you click on a link and have trouble getting back to the page you were previously viewing, you can always click back to “My Portfolio”, where you can start over

When you are on your **Individual Facility page**, you can view the space use attributes, such as Gross Floor Area, Number of PC's, etc. by clicking on the name of the space - in the example below, you would click on "School" to see the attributes (red oval):

Space Use Add Space					
Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	
School	K-12 School	100,000	95		Delete Space
School Parking Lot	Parking	5,000	5		Delete Space
Total		105,000	100		

Because more than 50% of your building is K-12 School, your building is designated as K-12 School within Portfolio Manager. This building may be eligible for a rating ([Click to learn more](#)). If you can see a rating for this building, please note that the rating takes into account all of the space types you have listed. If you cannot see a rating for this building, you can be compared to the national average for K-12 School ([Click to learn more](#)).

On this same **Individual Facility page**, right below the Space Use list, you will find the Energy Meters. Here is where you can click on an individual meter in order to view the monthly energy use & cost (red oval). You can also download your energy use & cost info to an Excel spreadsheet in one easy click (green oval):

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	Read/Write Access	
Meter 1 - Electricity	Electricity - Grid Purchase (kWh (thousand Watt-hours))	Entire Facility	12/31/2010			Delete Meter
Meter 2 - Gas meter	Natural Gas (kcf (thousand cubic feet))	Entire Facility	12/31/2010			Delete Meter
Meter 3 - Steam	District Steam (KLbs. (thousand pounds))	Entire Facility	01/28/2010	Data > 120 days old.; Less than one year of data. more		Delete Meter

No Metering Configuration has been set for this facility. A metering configuration may be established to indicate whether the whole facility energy consumption or only a portion of that total is represented by these meters. ([Set Metering Configuration](#))

Finally, to get to the Graphs & Reports page, go back to the My Portfolio page – you will then see the list of functions (shown on the previous page of this tip sheet, in the green brackets), and click on this link:

Reporting and Analysis
New! [Generate Reports and Graphs](#)

It will open up a page that looks like this (below), and from there you must follow the prompts as demonstrated in class – we are using the "Energy Performance" report template which you can choose from the drop-down list.