



Grouping Facility Data

The grouping function allows you to organize the facilities in your portfolio to match your management structure. For example, you may want to group facilities by region, energy manager, facility type, or, for property managers and service providers, by client.

How To Create a Group

1. From the "My Portfolio" page, click CREATE GROUP.
2. Enter a name for the group.
3. Check the "Set this Group as My Portfolio Default" checkbox if you want this group to be automatically displayed on the "My Portfolio" page.
4. Click the checkbox next to the name of each facility that you want to include in the group.
5. Click SAVE.

How to View a Group

1. From the "My Portfolio" page, select the group you want to see from "Groups" box or click VIEW ALL to the right of the other Group links to view all of your groups and their assigned facilities.

How to Edit a Group

1. From the "My Portfolio" page, select the group to be edited from "Groups" box.
2. Click EDIT GROUP.
3. From this page, you can either:
 - Change the group name;
 - Add a facility to the group by checking the box next to the facility's name; or
 - Remove a facility from the group by "unchecking" the box next to the facility's name.
4. Click SAVE. You will be returned to the "My Portfolio" page.

How to Delete a Group

1. From the "My Portfolio" page, select the group to be edited from "Groups" box.
2. Click EDIT GROUP.
3. Click DELETE GROUP to the right of the group's name.
4. Click DELETE on the confirmation page. You will be returned to the "My Portfolio" page.

**For more information,
select HELP or CONTACT US
from the top of any
Portfolio Manager screen.**

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