



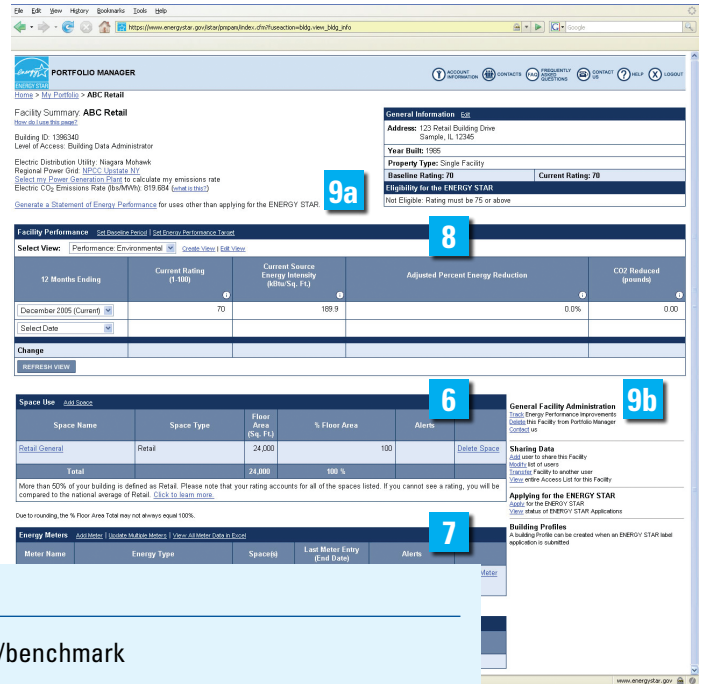
PORTFOLIO MANAGER - QUICK REFERENCE GUIDE

RETAIL BUILDINGS

Rate Your Energy Performance

Use the US EPA's energy performance rating system within Portfolio Manager to rate the energy performance of your retail facilities on a scale of 1–100. Rate all of your facilities and update the data regularly to take control of your energy costs. See top of page two for eligibility and data needed.

USE PORTFOLIO MANAGER STEP-BY-STEP



STEP	ACTIVITY	ACTION
1	Access Portfolio Manager	www.energystar.gov/benchmark
2	Access your account <ul style="list-style-type: none"> Create a new account Login to an existing account 	<ul style="list-style-type: none"> Click REGISTER next to "New User?" Enter user name and password and click LOGIN. From the "Welcome" page, click ACCESS MY PORTFOLIO
3	Add a new property	<ul style="list-style-type: none"> Click ADD A PROPERTY on the "My Portfolio" page
4	Specify property type	Select the appropriate option and click CONTINUE
5	Enter general building data	Enter all required information and click SAVE
6	Enter space use data	Go to "Space Use" section and click ADD SPACE <ul style="list-style-type: none"> Enter a space name, select the space type, and enter an effective date. Click CONTINUE Enter all required data. Click SAVE <i>Repeat for all space types present in the building</i>
7	Enter energy use data	Go to "Energy Meters" section and click ADD METER <ul style="list-style-type: none"> Enter Meter name, energy type, and units. Answer remaining questions (typically accept all defaults). Click SAVE Select desired number of meter entries and a start date. Click CONTINUE Enter energy use and costs. Click SAVE <i>Repeat for all fuel types used at the building</i>
8	Review and interpret results	On the "Facility Summary" page, review your results in the "Facility Performance" section
9a 9b	Manage account and apply for recognition	<ul style="list-style-type: none"> Generate a Statement of Energy Performance; "Select My Power Generation Plant" to calculate your emissions rate; view your baseline and current ratings Share data, apply for the ENERGY STAR, create/edit a building profile, and perform other administrative tasks

www.energystar.gov/benchmark
 E-mail: buildings@energystar.gov

ELIGIBILITY CRITERIA

- Store size of at least 5,000 square feet
- Operated a minimum of 30 hours per week
- Occupied for the last 12 months by at least 1 worker, with at least 1 cash register
- Stores must be free standing or located in strip centers
- Stores located in enclosed malls are not eligible, with the exception of mall anchors






Total gross floor area should include all supporting functions such as kitchens and break rooms used by staff, storage areas, administrative areas, elevators, stairwells, atria, etc. Retail segments typically eligible for benchmarking include: Department Store, Discount Store, Supercenter, Warehouse Club, Drug Store, Dollar Store, Home Center/Hardware, and Apparel/Hard Line Specialty. Retail segments typically not eligible for benchmarking include Electronics Stores.

RATING INTERPRETATION

Use your rating to set improvement goals and create an action plan. If your building's energy performance rating was:

- 1–49** After reducing the load on your building with aggressive low-cost operational changes, you may need to invest in capital equipment to further enhance performance and increase the bottom line
- 50–74** Significant opportunities to reap savings. Simple, low-cost operations and maintenance practices, combined with equipment upgrades, could yield significant savings
- 75–100** Gain recognition for your achievements and continue implementing best practices.

HELPFUL HINTS

- Enter at least 12 consecutive months of energy data, with no gaps or overlaps between meter entries
-  **ACCOUNT INFORMATION** Change your password or user profile
-  **CONTACTS** Maintain contact information for your energy team
-  **FREQUENTLY ASKED QUESTIONS** View online answers to Frequently Asked Questions
-  **CONTACT US** Use this option or e-mail buildings@energystar.gov for technical assistance
-  **HELP** Access online user-support information



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[www.energystar.gov/
benchmark](http://www.energystar.gov/benchmark)

E-mail: buildings@energystar.gov

DATA NEEDED


- Building address including zip code
- Year built
- Gross floor area
- Operating hours per week
- Number workers on main shift
- Number of personal computers
- Number of cash registers
- Number of walk-in refrigeration/freezer units
- Number of open and closed refrigeration/freezer cases
- Percent of building heated and cooled
- At least twelve consecutive months of energy use and cost data for all fuel types

FEATURES

- **Control account access and editing rights.** On the right side of the “[Facility Summary](#)” page, go to “[Sharing Data](#)” (see [9b](#) on page one). Click **ADD** to delegate access to your property to other users. Click **TRANSFER** to assign another user the role of “[Building Data Administrator](#)” for your property.

Sharing Data
 Add user to share this Facility
 Modify list of user's
 Transfer Facility to another user
 View entire Access List for this Facility
- **Group facilities within an account.** Organize properties into groups (e.g., by region, by facility type). From the “[My Portfolio](#)” page, click **CREATE GROUP**
- **Generate a Statement of Energy Performance.** Use this resource as a management report and transactional document. Above the “[Facility Performance](#)” section of the “[Facility Summary](#)” page, click **GENERATE A STATEMENT OF ENERGY PERFORMANCE** (see [9a](#) on page one)
- **Track ratings and eligibility for the ENERGY STAR.** From the “[Facility Summary](#)” page, under the “[General Information](#)” section (see [9a](#) on page one), check “[Eligibility for the ENERGY STAR](#)” and click **APPLY** if applicable
- **Track Water Meters.** At the bottom of the “[Facility Summary](#)” page, click **ADD METER** next to “[Water Meters](#)”

NOT FOR USE WHEN APPLYING FOR THE ENERGY STAR



**Statement of Energy Performance
FACILITY SUMMARY REPORT
ABC Retail**

For 12 month Period Ending: December 31, 2005
Date Generated: March 04, 2008


This document was generated using EPA's Portfolio Manager system. All information shown is based on data provided by the Portfolio Manager account holder. Depending on the use of the SEP Facility Summary, building owners or managers may want to have a professional engineer (PE) verify that the underlying data is accurate. Blank space has been left intentionally on the SEP Facility Summary for a stamp.

123 Retail Building Drive
Chicago, IL 60645
Year Built: 1995
Gross Floor Area: (ft²) 24,000

Facility Space Use Summary									
Facility Name	Stock Foot Area (ft ²)	Operating Hours/Week	Open and Closed Refrigeration/Freezer Cases	Walk-In Refrigeration/Freezer Units	Personnel on Main Shift	Number of Cash Registers	% Air-Conditioned	% Heated	
Retail (Overall)	24,000	60	0	1	10	4	0	100	100

Energy Performance Comparison						
Results	Current (12/01/05)	Baseline (01/01/05)	Delta	Target	Industry Average	ENERGY STAR
Energy Performance Rating	79	79	0	80	80	75
Energy Intensity (kBtu/ft ²)						
Site	67	67	0		75	63
Source	100	100	0		202	177
Energy Cost						
\$/year	0	0	0		0	0
\$/sq.ft/year	0.00	0.00	0.00		0.00	0.00
CO ₂ Emissions (tons/year)	194	194	0		216	183

More than 50% of your building is defined as Retail. Please note that your rating accounts for all of the spaces listed. If you cannot see a rating, you will be compared to the national average of Retail.



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