



PORTFOLIO MANAGER—QUICK REFERENCE GUIDE

HOUSES OF WORSHIP ELIGIBLE TO RECEIVE A 1 TO 100 RATING

Tracking Your Energy Performance

Portfolio Manager is an online, interactive energy management tool that allows you to measure and track your house of worship's energy and water consumption, identify investment priorities, and verify improvements over time. If you are also responsible for facilities which are ineligible to receive an ENERGY STAR® 1 to 100 energy performance rating – such as fellowship halls, gymnasiums, or residences– you can still enter your facility into Portfolio Manager to track your weather-normalized energy use intensity (EUI), energy costs, greenhouse gas emissions, and water consumption.

The screenshot shows the Portfolio Manager interface for a 'House of Worship Sample'. It includes sections for 'General Information', 'Facility Performance', 'Space Use', and 'Energy Meters'. Red callout boxes with numbers 1 through 9 highlight specific areas of the interface: 1 (Login), 2 (Account Management), 3 (Facility Summary), 4 (General Information), 5 (Facility Performance), 6 (Space Use), 7 (Energy Meters), 8 (Facility Performance table), and 9 (General Facility Administration).

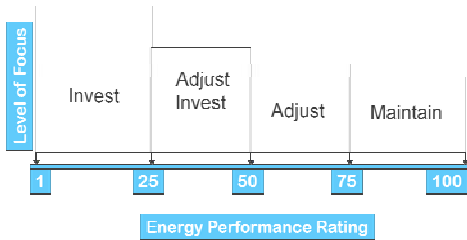
USE PORTFOLIO MANAGER STEP-BY-STEP

Step	Activity	Action
1	Access Portfolio Manager	http://www.energystar.gov/benchmark Scroll down to the Login section.
2	Access your account by: <ul style="list-style-type: none"> • Creating a new account, or • Logging into an existing account 	<ul style="list-style-type: none"> • Click REGISTER to create a new account, or • Enter user name and password and click LOGIN. • TAKE THE PORTFOLIO MANAGER TOUR to learn more
3	Review system updates and enter into account	Click ACCESS MY PORTFOLIO
4	Add a new facility	Click ADD a Property.
5	Select House of Worship and enter general facility information.	Select the option that most closely resembles your facility and click CONTINUE. Enter general data 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 facility name. In the “Select a Space Type” menu, select “House of Worship.” Enter an effective date. Click CONTINUE. • Enter space data. Click SAVE. • Using the “Select an Other Space Type” menu, select the space type that matches your facility • Repeat for Parking Lot
7	Enter Energy Use Data	Go to “Energy Meters” section and click ADD METER. <ul style="list-style-type: none"> • Enter Meter name, type, and units. Click SAVE. • Enter number of months and start date. Click CONTINUE. • Enter energy use and cost. Click SAVE. <i>Repeat for all energy meters and fuel types.</i>
8	Review and interpret results	Go to “Facility Performance” section and review your results. Guidance is provided on page two of this guide.
9	Manage account	Share data, generate a Statement of Energy Performance, “Select My Power Generation Plant” to calculate your emissions rate, and perform other administrative tasks

INTERPRETING YOUR:

ENERGY PERFORMANCE SCORE

Review your calculated Energy Performance Score and evaluate your performance on a 1 to 100 scale



SOURCE EUI

Review your calculated annual source EUI, and compare it to the national average source EUI for your building type or across your portfolio.

Then, set improvement goals and create an action plan. Use the guidance below to determine the appropriate next steps.

Below average (1-25) Greatest opportunity for improvement. Investments in new equipment, combined with aggressive low-cost operations and maintenance practices could have the greatest impact on your bottom line.

Average (26-74) Significant opportunities to reap savings. Simple, low-cost operations and maintenance practices, combined with equipment upgrades, could yield significant savings.

Above average (75 or Greater) Opportunity to demonstrate best practices. Continue to improve and maintain superior performance by focusing on operations and maintenance. If you score 75 or greater, you are eligible for the ENERGY STAR Label for your House of Worship.

DATA NEEDED

- Building address including zip code
- Gross floor area
- At least 12 consecutive months of overlapping energy use for all fuel types
- Seating Capacity
- Number of weekdays (Monday through Friday) that the facility is typically open.
- Weekly operating hours
- Number of PCs
- Presence of cooking facilities
- Number of Commercial Refrigeration/Freezer Units
- Parking lot size

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

HELPFUL HINTS

- Enter 12 consecutive months of overlapping energy data without gaps in time.
- When entering data, there is no need to include commas or other punctuation.
- When inputting a facility's energy use, be sure to select the correct units of measurement.

- View answers to Frequently Asked Questions.



- Maintain contact information for your energy team.



- Use this option or e-mail buildings@energystar.gov.



- Access user-support information and get answers.



FEATURES

- **Share facilities across accounts.** From the My Portfolio page, go to "Sharing Data" section and click **ADD**. Select user from current address list, enter a new Portfolio Manager name, or select a Portfolio Manager Account to share with.

- **Generate a Statement of Energy Performance: Facility Summary.** Review your facility's energy performance and environmental impact for a 12-month period and against a baseline. Use it as a management report and transactional document. From the Facility Summary page, click **GENERATE A STATEMENT OF ENERGY PERFORMANCE** and select a period ending date. Click **GENERATE REPORT**.

- **Customize Your Facility Performance View.** Portfolio Manager offers pre-set views to compare buildings to commonly used metrics. From the Facility Summary page, go to "Facility Performance" and choose an option from the "Select View" menu.

- **Track Water Meters.** From the Facility Summary page, go to the "Water Meters" section below the "Energy Meters" section. Click **ADD METER** and follow steps to get started.

- **Additional Guidance.** For more detailed guidance on using Portfolio Manager - including how to correct and update space use characteristics over time - register for live or recorded trainings on the ENERGY STAR Web site at www.energystar.gov/training.