



# Portfolio Manager Overview for Interagency Sustainability Working Group

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ENERGY STAR®  
**PortfolioManager**®

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## The Sustainable Buildings Checklist in Portfolio Manager

- Assists owners/managers with evaluating sustainability and compliance with the Federal High Performance Sustainable Building Guiding Principles
- Available for all properties in Portfolio Manager

### Use the Sustainable Buildings Checklist to:

- *Conduct initial and final building walkthrough assessments*
- *Track and easily view progress on each guiding principle*
- *Upload compliance documents to the repository for record keeping*
- *Create a portfolio-wide sustainability roll-up report*
- *Review up-to-date energy and water metrics generated by Portfolio Manager*



# Access the Sustainable Buildings Checklist

MyPortfolio | Sharing | Planning | Reporting | Recognition

### Insurance Office

5201 Blue Lagoon Dr, Arlington, VA 20221 | [Map It](#) EXISTING  
Portfolio Manager Property ID: 5000011 | Primary: [Office](#)  
Year Built: 1995 EXISTING

ENERGY STAR Score

Current Score: [N/A](#)

Baseline Score: [76](#)

Summary | Details | Meters | **Goals** | Design

### Third Party Certifications

You can track your third party certifications, such as LEED and Green Globes. This information will automatically be included in your Sustainable Buildings Checklist.

Third Party Certifications

You have not added any third party certifications for this property.

[Add or Edit Third Party Certifications](#)

### Sustainable Buildings Checklist

Checklist Complete: 0%

|                |      |
|----------------|------|
| Yes            | 0%   |
| Not Applicable | 0%   |
| No             | 0%   |
| In Process     | 0%   |
| Not Assessed   | 100% |

Checklist completion percentage includes "Yes" and "Not Applicable" responses.

### Sustainable Buildings Checklist

This Checklist evaluates sustainability in existing buildings. It was originally developed for US Federal buildings managers for compliance with the Federal Guiding Principles for High Performance Sustainable Buildings. It is also a valuable tool for evaluating the sustainability of non-government buildings.

Target Date of Compliance: Not Set

Actual Date of Compliance: Not Set

[Start the Checklist](#)

Click on the "Goals" tab for a specific property and scroll to the bottom of the page



# Sustainable Buildings Checklist Overview

MyPortfolio
Sharing
Planning
Reporting
Recognition

## Sustainable Buildings Checklist: BUILDING TEST

The Sustainable Buildings Checklist evaluates sustainability in existing buildings. It was first developed for US federal building managers for compliance with the [Federal Guiding Principles for High Performance Sustainable Buildings](#). It is also a valuable tool for evaluating the sustainability of non-government buildings.

### About this Property

Property Name: [BUILDING TEST](#) [View Details & IDs](#)

### About this Checklist (Last Updated: 01/09/2015)

Estimated Date of **Sustainable Buildings Checklist** Compliance:

Actual Date of **Sustainable Buildings Checklist** Compliance:

Third Party Certification: None [Select a Third Party](#)

Checklist Manager:

[Add Contact](#)

Compliance Documents: 0 files [Upload and View Documents on File](#)

[+ Add Note to this Checklist](#)

### Checklist Complete: 0%

- Yes 0%
- Not Applicable 0%
- No 0%
- In Process 0%
- Not Assessed 100%

Checklist completion percentage includes "Yes" and "Not Applicable" responses.

Generate & Download A Printable Checklist

This Printable Checklist can be used to show all of your responses to date or to prepare your responses in advance.

Download & Print PDF



# Complete Checklist Step by Step

## Complete the Sustainable Buildings Checklist

- Employ Integrated Assessment, Operation, and Management Principles
  - Integrated Assessment, Operation, and Management
    - Team**
    - Goals
    - Plan
    - Occupant Feedback
  - Commissioning
- Optimize Energy Performance
  - Energy Efficiency
  - Onsite Renewable Energy
  - Measurement and Verification
  - Benchmarking
- Protect and Conserve Water
  - Indoor Water
  - Outdoor Water
  - Storm Water
  - Water Efficient Products
- Enhance Indoor Environmental Quality
  - Ventilation and Thermal Comfort
  - Moisture Control
  - Daylighting and Lighting Controls
  - Low-Emitting Materials
  - Integrated Pest Management
  - Tobacco Smoke Control
- Reduce Environmental Impact of Materials
  - Recycled Content
  - Biobased Content
  - Environmentally Preferable Products
  - Waste and Materials Management
  - Ozone Depleting Compounds

Guiding Principle: Team

Use an integrated team to develop and implement policy regarding sustainable operations and maintenance.

- Yes
- No
- In Process
- Not Assessed
- Not Applicable (N/A) - [Justification Required](#)

[View References & Resources](#)

### Supporting Documentation

- Team roster or equivalent
- Completed "Responsible Team Member" fields
- Other

[Upload and View Documents on File](#)

### Responsible Team Member

Team Member:

### Notes/Comments:

<< Back

Save & Close

Save & Continue >>

[Cancel](#)

# Reporting Tab

MyPortfolio | Sharing | Planning | **Reporting** | Recognition

### Charts & Graphs

Source EUI

What is the total energy footprint of my properties, including raw fuel associated with generation and transmission?

### ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Score Card](#)

### Templates & Reports (8)

[Create a New Template](#)

| Name                                   | Status              | Action  |
|--|---------------------|---|
| Performance Highlights                 | No Report Generated | I want to... <input type="button" value="v"/> |
| Energy Performance                     | No Report Generated | I want to... <input type="button" value="v"/> |
| Emissions Performance                  | No Report Generated | I want to... <input type="button" value="v"/> |
| Water Performance                      | No Report Generated | I want to... <input type="button" value="v"/> |
| Fuel Performance                       | No Report Generated | I want to... <input type="button" value="v"/> |
| ENERGY STAR Certification Status       | No Report Generated | I want to... <input type="button" value="v"/> |
| Partner of the Year Report             | No Report Generated | I want to... <input type="button" value="v"/> |
| Sustainable Buildings Checklist Report | No Report Generated | I want to... <input type="button" value="v"/> |

Choose from Pre-set Chart & Graph options

Create and generate Templates & Reports

Download Performance Documents



## Reporting Tab: Over 150 Metrics

- Guiding Principles
  - % Complete, % Yes, % In Process, % No, % Not Applicable
- Energy Performance
  - 1-100 energy performance score
  - Weather normalized energy use per square foot
- Water Performance
  - Total annual indoor/outdoor water use
  - Water use per square foot
- Financial Performance
  - Energy and water cost per square foot
  - Change in utility costs over time
- Greenhouse Gas Emissions
  - Total annual GHG, Change in GHG emissions over time
- [Full list of Portfolio Manager custom reporting metrics](#)



## Data Quality Alert Metrics Available in Custom Reports

- Each of these alert fields will return one of the following responses:
  - “Okay” – This alert was reviewed and is not an issue for the property (i.e. no meter gaps)
  - “Possible Issue” – This alert was reviewed and a possible issue was identified (i.e. there are meter gaps)
  - “Not Checked (not enough data)” – Means this item could not be evaluated, most likely because of one of the other alerts identified as a possible issue

### Data Quality Alerts Metrics in Reports

|  |
|--|
| Estimated Values (y/n)   |
| Default Values (y/n)   |
| Temporary Values (y/n)   |
| Data Quality Checker Run? (y/n)  |
| Data Quality Checker - Date Run (will return date or N/A if it wasn't run) |
| *Alert- No meters are associated with the property                         |
| *Alert- Meter has less than 12 full calendar months of data                |
| *Alert- Meter has gaps   |
| *Alert- Meter has overlaps   |
| *Alert- Data Center does not have an IT Meter                              |
| *Alert- Property has no uses   |
| *Alert- Gross Floor Area is 0 ft2  |
| *Alert- Meter entry is more than 65 days long.                             |

# Request Data Using Custom Reporting Templates

Templates & Reports (9)

Create a New Template

| Name                                   | Status              | Action       |
|--|---------------------|--------------|
| Water Performance                      | No Report Generated | I want to... |
| Sustainable Buildings Checklist Report | No Report Generated | I want to... |
| Performance Highlights                 | No Report Generated | I want to... |
| Partner of the Year Report             | No Report Generated | I want to... |
| Fuel Performance                       | No Report Generated | I want to... |
| ENERGY STAR Certification Status       | No Report Generated | I want to... |
| Energy Performance                     | No Report Generated | I want to... |
| Emissions Performance                  | No Report Generated | I want to... |
| Test 2                                 | No Report Generated | I want to... |

Generated reports will only be available for 30 days. After that time you will need to generate a new report to obtain data with your template.

Name Your Request

Verify Data

- Timeframe
- Locations
- Info and Metrics

MyPortfolio | Sharing | Planning | Reporting | Recognition

## Create a Data Request

Here you can use your custom data report template to collect data from others. Please make sure that all of the information is correct because once you publish this request, your template will be locked and you will not be able to make any changes.

- Name Your Request**

Name:

This name is pre-populated with the name of your template, but you can feel free to change it. If you will be making multiple data requests from the same template, you may want to make these names unique.
- Verify the Data you are Requesting**

Please check the data selections you made when you set up your template and confirm that this is correct. You will not be able to change this information after releasing your request.

**Timeframe:**  No specific timeframe requested  Specific timeframes requested

**Location(s):**  No specific Country & State(s)/Provinces selected  Specific Country & State(s)/Provinces selected

| Metric Category      | Metric Name                          |
|----------------------|--------------------------------------|
| Property ID Numbers  | Portfolio Manager Campus Property ID |
| Property ID Numbers  | Portfolio Manager Property ID        |
| Property Information | Parent Property Name                 |
| Property Information | Property Name                        |

**1 Selecting Information & Metrics**

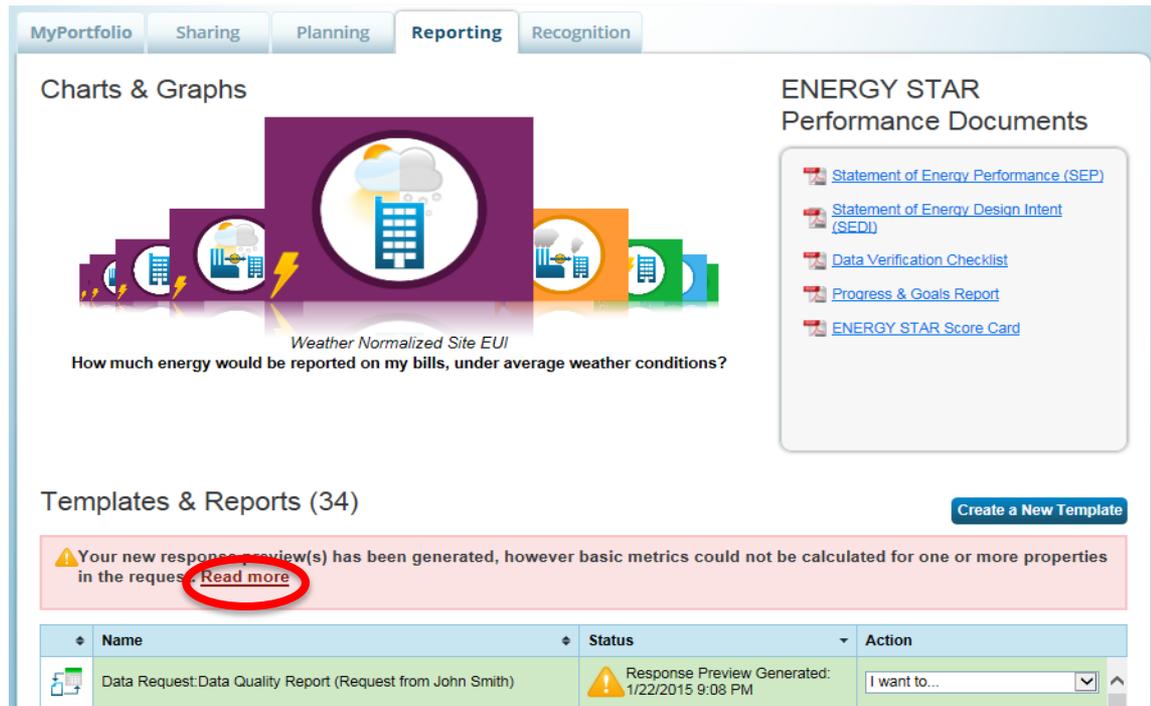
If you select a large number of items, it will make it more difficult for people to respond to your request and more time consuming for you to retrieve responses. Remember each item you request will be multiplied by the number of properties that each respondent includes in their response. Responses that are too large may take a long time for Portfolio Manager to compile before you can retrieve the responses. [Learn more about selecting information and metrics for data requests.](#)

**2 Need to change the metrics?**

If you need to make adjustments to the

# New Data Quality Alert Screen for Data Requests

- Available in all Portfolio Manager data requests
- Alerts the user if at least one property within the response cannot receive an annual site EUI or Water Use metric for the performance period
- An alert box appears on the Reporting tab and an icon  appears next to the affected data request
- Clicking “Read more” will direct the user to a page that contains more details



The screenshot shows the Energy Star Reporting tab interface. At the top, there are navigation tabs: MyPortfolio, Sharing, Planning, Reporting (selected), and Recognition. The main content area is titled "Charts & Graphs" and features a bar chart with a central circular graphic containing a building and a sun. Below the chart, the text reads "Weather Normalized Site EUI" and "How much energy would be reported on my bills, under average weather conditions?". To the right, there is a section titled "ENERGY STAR Performance Documents" with a list of links: Statement of Energy Performance (SEP), Statement of Energy Design Intent (SED), Data Verification Checklist, Progress & Goals Report, and ENERGY STAR Score Card. Below this, there is a section titled "Templates & Reports (34)" with a "Create a New Template" button. A red alert box is present, containing the text: "Your new response preview(s) has been generated, however basic metrics could not be calculated for one or more properties in the request." A "Read more" link is circled in red within this alert box. Below the alert box is a table with the following data:

| Name  | Status  | Action                            |
|---|---|-----------------------------------|
| Data Request: Data Quality Report (Request from John Smith) |  Response Preview Generated: 1/22/2015 9:08 PM | I want to... <input type="text"/> |



# New “N/A Screen” for Data Requests

- After clicking “Read more” the user sees the alert page, listing all properties for which “Not Available” is present in the Site EUI or Water Use field alongside specific data quality alerts
- The links within the alerts take the user to the Portfolio Manager screen where the data omissions/errors can be fixed

## Data Request Response Has Missing Metrics (N/A's)

**⚠** Your data response contains 41 properties where the [Site EUI](#) and/or [Total Water Use](#) could not be calculated.

When [Site EUI](#) and/or [Total Water Use](#) cannot be calculated, typically it means there is not 12 full months of complete meter data or there is a problem with your property's [Gross Floor Area](#). These metrics are the basis for other more complicated metrics (such as the [ENERGY STAR Score](#)), so other metrics may also be unavailable as a result.

Properties With Missing Metrics (N/A's) (41) (response preview generated 01/22/2015 09:08 PM EST)

| Property ID | Property Name                           | Period Ending Date | Site EUI   | Total Water Use   |
|-------------|---|--------------------|--|---|
| 3681819     | <a href="#">Portfolio Manager Store</a> | 12/31/2014         | The meter <a href="#">Electric Grid Meter</a> does not have 12 full calendar months of bills for the selected year. Please enter bills for the full 12 months.   | This property does not have at least one meter for the type of energy or water used in this metric calculation. For example, you cannot receive a value for "total electricity" if you only have gas meters. If you believe there is an error, go to the Meters tab, select "View/Edit Configuration" and make sure you've associated the correct meter(s) for use in your metrics. |
| 3884860     | <a href="#">Sample 1</a>                | 12/31/2014         | You do not have any meters associated with your property. To associate a meter, go to the Meters tab and select "View/Edit Configuration," then tell us which meters to add together for your performance metrics. | You do not have any meters associated with your property. To associate a meter, go to the Meters tab and select "View/Edit Configuration," then tell us which meters to add together for your performance metrics.  |
| 4021271     | <a href="#">Sample 1</a>                | 12/31/2014         | You do not have any meters associated with your property. To associate a meter, go to the Meters tab and select "View/Edit Configuration," then tell us which meters to add together for your performance metrics. | You do not have any meters associated with your property. To associate a meter, go to the Meters tab and select "View/Edit Configuration," then tell us which meters to add together for your performance metrics.  |



## New “N/A Screen” for Data Requests

The user has three options when N/As have been found:

1. Review and edit properties (using hotlinks or Excel)
2. Generate an updated response (they fixed the underlying data problems but didn't complete this step in the process)
3. Submit the response with N/As

### What Would You Like To Do?

#### I Want to Review/Edit these Properties

You can review individual properties/meters by using the links in the table above or [download it to Excel](#) in order to begin troubleshooting these issues.

#### I Thought I Fixed These Problems- I Want to [Generate an Updated Response](#)

If you have made changes to your data since your response was generated (01/21/2015 03:34 PM EST), you will need to re-generate the report in order for these changes to be reflected.

[Generate Updated Response](#)

#### I Want to Submit Anyway

If you have verified that any issues listed in the table above are not the result of a mistake, you can continue submitting your response. Note that an incomplete request could be considered invalid or non-compliant by the requestor so it is strongly encouraged that you fix any issue before proceeding.

[Send Response](#)

## Third Party Training and Credentials

- Certificate of Proficiency in Benchmarking (CPB)
  - Developed by the Consortium for Building Energy Innovation (CEBI) and issued by the New Jersey Institute of Technology (NJIT)
  - Recognizes successful completion of online-based training modules and proven minimum competencies in the use of the U.S. Environmental Protection Agency's ENERGY STAR Portfolio Manager® tool.





# Portfolio Manager Help Page

The screenshot shows the Portfolio Manager Help Page. At the top left is the Energy Star logo and the text 'ENERGY STAR® PortfolioManager™'. At the top right, there are links for 'Help | Login' (circled in red) and 'Language: English | Français'. Below the header is a navigation bar with tabs for 'MyPortfolio', 'Sharing', 'Planning', 'Reporting', and 'Recognition'. The main content area is titled 'Portfolio Manager Help' and contains several help topics with icons: 'Learn More about Portfolio Manager', 'Search the Knowledge Base', 'Check the Glossary', 'Take or View a Training', 'Ask a Question', and 'Web Service Documentation'. To the right is a 'Technical References' section with links to 'Source Energy', 'Greenhouse Gas Emissions', 'ENERGY STAR Scale', 'National Median Values', 'Accounting for Climate & Weather', and 'Thermal Conversion Factors'. At the bottom, there are social media links for Facebook, Twitter, and YouTube, and a footer with 'Follow Us' and various utility links.

**ENERGY STAR® PortfolioManager™**

Help | Login  
Language: English | Français

MyPortfolio | Sharing | Planning | Reporting | Recognition

## Portfolio Manager Help

- [Learn More about Portfolio Manager](#)  
Get fact sheets, quick reference guides and other information about how the tools works.
- [Take or View a Training](#)  
Sign up for a session or view a recording on a wide variety of topics.
- [Search the Knowledge Base](#)  
Browse or search our Frequently Asked Questions.
- [Ask a Question](#)  
Send a question or comment to our staff.
- [Check the Glossary](#)  
Look up terms used throughout Portfolio Manager.
- [Web Service Documentation](#)  
If you exchange data via web services, check out the documentation or get email updates.

Don't forget, we're out there with you! Network with us and other folks who are using Portfolio Manager.

[Like us on Facebook](#) | [Follow Us on Twitter](#) | [View Our YouTube Channel](#)

### Technical References

Are you into the math of it all? Learn more about how Portfolio Manager calculates metrics.

- [Source Energy](#)
- [Greenhouse Gas Emissions](#)
- [ENERGY STAR Scale](#)
- For more information on specific property types, like office and school, visit the [ENERGY STAR website](#). These are available in English only.
- [National Median Values](#)
- [Accounting for Climate & Weather](#)
- [Thermal Conversion Factors](#)

[Get more documentation on the ENERGY STAR website.](#)

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## Extra Help- Official EPA Resources

- Visit [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp)
  - Expanded list of FAQs
  - Online form to submit technical questions or comments
- Additional Portfolio Manager training resources available at: [www.energystar.gov/buildings/training](http://www.energystar.gov/buildings/training)
  - Step-by-step documents (PDF)
  - Access to recorded trainings at <http://www.energystar.gov/buildings/training/recorded-training>
- Register for regularly scheduled live webinars at: <http://esbuildings.webex.com>