Guide to: Entering Energy Data into Portfolio Manager

Prepared for the Rye, NH Energy Committee by:

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Summer 2014
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Welcome to Portfolio Manager!

These directions will guide you in entering data into Portfolio Manager and will describe different aspects of the tool. EPA’s ENERGY STAR Portfolio Manager tool helps you measure and track energy use, water use, and greenhouse gas emissions of your buildings, all in a secure online environment. You can track this data for a single building or for your entire group, or portfolio, of buildings. The tool will assist you in identifying under-performing buildings, setting investment priorities, verifying efficiency improvements, and receiving EPA recognition for superior energy performance. Below are some helpful reminders as you proceed with the directions.

- Screenshots were taken from an account for an example building, so some features or numbers might look different on your screen. Highlighted RED boxes and RED arrows help you locate key items.
- A helpful tip while you are using Portfolio Manager is to put your mouse over the highlighted words in blue on the webpage to see a pop-up definition.

2. Under **Log in to Energy Star** in the lower right side of the screen, Click on the **Portfolio Manager** box.

3. The program will then show boxes for entering your login information. Enter your **username** and **password**. Click the **LOGIN** box.

Record your username and password here:

Username:______________________

Password_______________________
4. You will be directed to the MyPortfolio screen in Portfolio Manager, showing a list of all the properties in your portfolio (municipal buildings in your town). This page also shows charts on how your entire portfolio as a whole is doing for energy use intensity (Source EUI) and greenhouse gas emissions (GHG Emissions) over the last few years, with lower numbers indicating better performance.

At any point while you are using Portfolio Manager you can return to this page by clicking the Portfolio Manager heading at the top of the screen or the MyPortfolio tab heading.
5. To add a fuel delivery or monthly electricity data to a property, first find the property from the list of properties on the MyPortfolio screen.
By using the drop down box, select **Add/Edit Bills**.
6. This will bring you to the Electric Grid Meter page where you can begin to enter electricity billing information from your utility bills.

The following information will need to be entered correctly or the program will not save information:

- **Start/End date of bill (mo/day/year)**
  These are the start and end dates for the billing period on your bill. Usually these dates cover approximately one month. When you enter these dates, they cannot overlap nor have any gaps in the dates. The examples below will not work.

  **NOT ACCEPTABLE:**
<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2014</td>
<td>02/01/2014</td>
</tr>
<tr>
<td>01/27/2014</td>
<td>02/27/2014</td>
</tr>
</tbody>
</table>

  The second entry overlaps first entry.

  Or

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2014</td>
<td>02/01/2014</td>
</tr>
<tr>
<td>02/10/2014</td>
<td>03/10/2014</td>
</tr>
</tbody>
</table>

  There is a gap between the first entry and the second entry.

- **Usage**
  This is the amount of the energy source that was consumed during the given month. Electricity will usually be measured in kilowatt-hours (kWh), fuel oil and propane in gallons, and water in gallons.

- **Cost**
  This will be a dollar amount, but when entering it in, no dollar sign ($) is needed

The **Estimation** check box is there for you if you are predicting bills or not 100% positive you have the correct billing information. This allows you to flag the entry so you can go back and enter the correct billing information.

The **Green Power** check box allows you to identify if any renewable/green energy sources are contributing to your totally energy source.
Click **Click to add an entry** under the Start Date column to begin entering billing data.

7. White rectangular boxes will appear for entering the data.

Enter appropriate data into white rectangles.
8. Add/Save/Change

1. To add additional billing information click **Add another Entry** and repeat step 7.
2. Once you are finished entering data click **Save Bills** to save the data just entered. You will get a message that your data was successfully saved or an error message if there are gaps or overlaps in your dates.
3. To add billing information to another meter for this building from this page, click on the drop down menu, select a meter then click **Select Meter**. When you click on the **Select Meter** drop down, all the meters for the property will appear and by clicking on the meter name you will move to that meters’ page.

You may also click **Close** (next to the Save Bills) or the name of the property at the top of the page in **blue** text.
9. Portfolio Manager makes it simple to work on multiple meters and multiple properties in one sitting. Utility companies tend to not send bills out at the same time. For example an electricity bill might come during the first week of the month and an oil or gas bill could arrive within a week of its delivery.

To access a different meter for the same property that is currently being worked on, click on the drop down, click on the meter name and then click the SELECT METER button.
To change the property you can click on the Portfolio Manager logo on the top left of the screen which will bring you to the MyPortfolio page. From there follow step 5.

10. Change/Edit Entry
Changes can be made to your entered data at any time. Proceed to the particular meter that has the entry that needs edits. Then simply click anywhere on the individual entry and it will reopen for editing. Once changes have been made, remember to click Save Bills.
11. Delete Entry
Any entry can be deleted at any time. Proceed to the particular meter that has the entry that needs edits. Then simply click the box in the most left-hand column of the particular meter that needs to be deleted and click **Delete Selected Entries**. Once changes have been made, remember to click **Save Bills**.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>End Date</th>
<th>Usage kWh (thousand Watt-hours)</th>
<th>Cost ($)</th>
<th>Estimation</th>
<th>Green Power</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/1/2014</td>
<td>2/1/2014</td>
<td>100</td>
<td>1375</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2/1/2014</td>
<td>3/1/2014</td>
<td>100</td>
<td>1375</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3/1/2014</td>
<td>4/1/2014</td>
<td>100</td>
<td>1375</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

12. To enter multiple months worth of bills into **Portfolio Manager**, there is an Excel spreadsheet on each meter’s page that can be downloaded, filled in with the data, and then uploaded to **Portfolio Manager**. This is particularly useful, for example, if you can get electricity data from your utility in spreadsheet form from an online account.
A. Download spreadsheet template by clicking **spreadsheet template** under the meter chart.

   a. Your internet browser might ask what action to take with the download. Click Open to open the document, and it can be saved to your computer once it is open.

   (Meter Entries) for **Example Office**
b. Once the spreadsheet is open, data can be entered in a similar manner to entering the data online. **Note:** with the spreadsheet template you must fill in the Estimated Value column. If the usage and cost are estimated values, click the cell under Estimated Value and then click **True**. If the usage and cost are actual values, not estimated values, click the column and select **False**.

c. Once data is entered click **File**, then **Save As**. Select where the file should be saved on your computer or server, then name the document and click **Save**. Once the document is saved it can be closed by clicking the X in the top right corner.
B. To upload the spreadsheet into Portfolio Manager, click **Browse**, then select your **document**, then click **open**, and finally click the blue **Upload** icon. If all the entries were done correctly, then they will appear on the meter’s page. Once changes have been made, remember to click **Save Bills**.
Other Features within Portfolio Manager

When at least 1 year’s worth of data has been entered into Portfolio Manager it can be used to plan goals, create reports, and apply for recognition from Energy Star. These tools will help create visual aids to demonstrate energy efficiency progress as well as to support future projects. The Planning, Reporting, and Recognition tabs contain the tools to do this and will be described below.

1. Planning
The Planning tab allows the users to set goals for buildings and see how all the buildings are achieving their goals. This will help keep track of the results from a capital improvement project and will help track how much more needs to be done to achieve the goal set.
Under the action column, PM gives many options for editing, viewing and setting goals and baselines. Normally, baseline years are set automatically by Portfolio Manager, but you are able to set a custom year using the drop-down menu under Action.

Below is an important concept that explains how to use Metric Dates.

**Important Concept**

**Metric Date**

All Portfolio Manager metrics are computed on an annual basis, meaning they represent 12 full calendar months of data. The date associated with a given metric is the last day of the 12-month period to which it applies. For example, a date of 12/31/2012 would be used for metrics that represent the calendar year of 2012.

*There are three particular dates of interest for a property:*

• **Earliest Date** – The Earliest Date is the date that marks the first 12 month period for which you have complete data. Please note that the earliest date may differ from your Baseline Date. Your earliest date is determined by Portfolio Manager and simply indicates the earliest possible date for which you have 12 months of data. The Baseline date may be determined by you, according to your management goals. Please note that a different earliest date may be determined for your energy and water meters.

• **Baseline Date** – The Baseline Date marks the 12-month period selected as the Property's baseline for comparison. For example, a baseline date of 12/31/2005 means that your baseline is the calendar year of 2005. You can set a different baseline date for energy and for water.

• **Current Date** – The Current Date marks the most current date for which there are 12 full months of data. For example, if your Current Date is 12/31/2012, then you have complete meter data for the 12 months ending December 2012. A different current date is determined for energy and water, based on the most current meter data.
2. Reporting
Once one year of data has been entered, Portfolio Manager will then be able to produce charts and graphs, Reports, and Energy Performance Documents.

A. Graphs & Charts
Graphs and charts can be generated automatically and downloaded for groups of buildings, which can be created on the user’s main page. The options for Graphs and Charts are:

- Indoor Water Intensity, Indoor Water Cost Intensity, Energy Cost Intensity,
- Energy Star Score, Weather Normalized Site EUI, Weather Normalized Source EUI,
- Total GHG Emissions Intensity, Site EUI, and Source EUI.
B. Reports
Reports can be generated by going the reporting tab, selecting a report under the Templates & Reports section of the page, Selecting Properties and Timelines in the reports drop down box, setting the appropriate properties and timelines of data that will be in the report. Then once back on the Report Tab page go back to the reports drop down box and select Generating a New Report. A notification will appear at the top of the page and then by going to the reports drop down box again you can select how you would like to review the report. This will produce an Excel spreadsheet that can be downloaded and used to create custom graphs and charts.

Below are links to:
Guide to Standard Reports
And
Guide to Custom Reports

C. Energy Star Performance Documents
The following Performance Documents can be generated by Portfolio Manager;
Statement of Energy Performance (SEP), Statement of Energy Design Intent, (SEDI), Data Verification Checklist, Progress & Goals Report, Energy STAR Score Card

3. Recognition
The link below is a guide to apply for recognition from Energy Star. Commercial and municipal buildings can qualify for this recognition by demonstrating energy performance within the top 25% of similar buildings nationwide.

http://www.energystar.gov/buildings/tools-and-resources/how-apply-energy-star

Other Useful Link:
Glossary - https://portfoliomanager.energystar.gov/pm/glossary

For more information and helpful tips on Portfolio Manager please visit http://www.energystar.gov/buildings/training