

Sustainable Wastewater Infrastructure of the Future (SWIFt)

Getting Started: ENERGY STAR Portfolio Manager (PM)

EPA's **ENERGY STAR Portfolio Manager (PM)** is a publicly available tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions, with an ENERGY STAR score generated for wastewater facilities larger than 0.6 million gallons per day. You can compare three publicly available energy data tools in the Data Tool Comparison Matrix, included in DOE's Wastewater Energy Management Toolkit. If you have elected to use ENERGY STAR PM for your energy data management, this reference sheet helps you set a baseline, create a record, and find user help from EPA.

How do I add a record in Portfolio Manager?

To add a meter record in Portfolio Manager, follow these steps:

- 1) Log into [Portfolio Manager](#)
- 2) Click on the property where you would like to create a meter record.

To add flow meter data:

- 1) Navigate to the "Details" tab.
- 2) Click the name of the flow meter where you would like to add information.
- 3) If you have not yet set up your energy and flow meters, you may do so by clicking "Add a Meter" in the "Plant Flow Rate Meters" section and following the prompts.
- 4) Scroll down to the bottom of the page and click "Add an Entry." If you have multiple entries to add, click the button multiple times, once for each entry.
- 5) Once you are done, click "Save Bills."
- 6) Repeat as required for any additional flow meters.

To add energy meter data:

- 1) Navigate to the "Energy" tab.
- 2) Click the name of the energy meter where you would like to add information.
- 3) -If you have not yet set up your energy and flow meters, you may do so by clicking "Add a Meter" in the "Meters – Used to Compute Metrics" section and following the prompts.
- 4) Scroll down to the bottom of the page and click "Add an Entry." If you have multiple entries to add, click the button multiple times, once for each entry.
- 5) Once you are done, click "Save Bills."
- 6) Repeat as required for any additional energy meters.

For more information about adding entries to meters, as well as alternate input options, please see the link below.

<https://portfoliomanager.zendesk.com/hc/en-us/articles/211026098-How-do-I-add-energy-meter-data-bills-to-my-property->

How do I choose a baseline year?

You may make any year the baseline year from which to begin tracking your facility's energy consumption. A few things to consider when making this choice:

- For whatever baseline you choose, you will need to gather and enter energy data for that baseline period forward.
- If you have recently completed energy efficiency retrofits or upgrades, and want to capture the impact of those upgrades, choose a baseline year that begins at least 12 months before the upgrades were installed.

How do I set my baseline year in Portfolio Manager?

To set a baseline year in Portfolio Manager:

- 1) Log into [Portfolio Manager](#)
- 2) Click on the property whose baseline you would like to set.
- 3) Navigate to the “Goals” tab.
- 4) Scroll down until you see the “Set Baselines or Target” button.
- 5) Select the last month in your desired baseline period on this screen. For example, if you want to set your baseline as calendar year 2014, then select 12/31/2014 on this screen.

If you choose not to set a baseline year, Portfolio Manager will automatically set your baseline to the first 12-month period which has complete energy meter data.

For more information on how to set a baseline period, as well as information on how to set a baseline for all properties in your Portfolio at once, visit:

<https://portfoliomanager.zendesk.com/hc/en-us/articles/211027628-What-is-a-baseline-year-How-do-I-change-it->

How do I calculate my baseline energy use and change from baseline in Portfolio Manager?

The reporting feature in Portfolio Manager provides metrics for your property for any time period provided.

To get these metrics, follow these steps to create a custom report template:

- 1) Navigate to the “Reporting” tab.
- 2) Click the “Create a New Template” button.
- 3) Name your template. Note that everything you enter here can be changed at a later date. If you want to change the name of the report or the metrics that you’ve included, you can do so easily.
- 4) Select your reporting period. In order to get metrics for your baseline year, select “Baseline Energy Year.” Portfolio Manager can also give you metrics for multiple years at once. For a comparison between the most recent year and the baseline year, select the “Current Energy Year vs. Baseline Energy Year” option.
- 5) Pick which property or properties you would like to be included in the report.
- 6) Select the metrics you would like to include in the report. The most useful metrics will likely be the “Water/Wastewater Site EUI (kBtu/gpd)” and “Water/Wastewater Source EUI (kBtu/gpd),” but you can also include metrics such as your total energy use, your flow amounts, or your costs. The metrics are sorted by category on the left, and you can include up to 50 in a single report.
- 7) Click “Save Template” to finish! Run the report by clicking on the Reporting tab and selecting “Generate Report” from the dropdown menu.

For more information on how to create your own custom reports, visit:

<https://www.energystar.gov/buildings/tools-and-resources/portfolio-manager-custom-reporting-guide>

Where can I go if I need additional help?

Visit the ENERGY STAR Portfolio Manager FAQ website here: <https://portfoliomanager.zendesk.com/hc/en-us>