

# Instructions for Using the EPA's Portfolio Manager

The EPA Portfolio Manager is an energy management tool that allows users to track and assess their resource consumption. Efficiency gains or losses can be tracked in individual buildings as well as all buildings on all properties. This allows users to monitor their progress and to identify where they can continue to improve. The EPA will rate the efficiency of users and change this rating as improvements are made. The Petal Project requires participation in this project, but does not require a specific rating. It is the hope of the Petal Project that as participants become certified, their ratings will increase. This document was developed to serve as a guide for new users, but it is not an exhaustive list of all the features available.



# How to create an account

1. Go to the EPA Portfolio manager website: <https://www.energystar.gov/istar/pmpam/>.
2. Click on “Register” (Figure 1.1)
3. On the next page, fill out the necessary information. The last section will ask if you want your account to be a master account. Do not create a master account unless you plan on using your portfolio to track several of your own sites. For example if your business/organization is composed of several buildings.

Figure 1.1

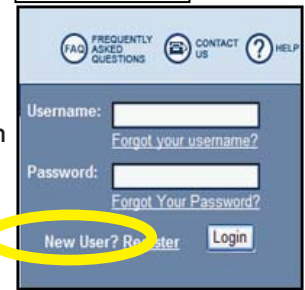


Figure 1.2

## (Optional) Master Account Feature (for [Sharing Facilities](#))

By selecting the checkbox below, you will add your username and organization name to the Portfolio Manager Master Account registry. Master Accounts are intended to help users who need to track a large number of facilities managed by [other](#) Portfolio Manager users. Examples of appropriate use of the Master Account designation include:

- An association running an energy efficiency campaign might use a Master Account to track the progress of its members.
- A local or state government running an energy efficiency campaign might use a Master Account to track the progress of its constituents.
- A company or organization that is benchmarking a large number of facilities might create a Master Account to track the performance of its entire organizational portfolio.

By identifying your account as a "Master Account", your user and organization name will display for ALL Portfolio Manager users who wish to share facilities. Users who want to share facilities with you will be able to view and select your user and organization name during this process.

Those needing to share only a small number of buildings are encouraged to use Portfolio Manager's regular sharing feature and are asked **NOT** to set up a Master Account. [Learn more](#) about Master Accounts.

Display my user and organization name to ALL Portfolio Manager users who wish to share facilities with my account.

CANCEL SAVE PROFILE

4. Click “Save Profile”. (Figure 1.2)
5. Retrieve the login name and password that was sent to the designated email.

By following these steps, your business/organization will now have created a registered account with the EPA's Portfolio Manager. All properties that are monitored will be listed here.

# Adding Properties

1. When at the “My Portfolio” page, click on “Add a Property”. (Figure 2.1)

Figure 2.1



2. Fill in the necessary information about a property your business/organizations uses in its operations.

The screenshot shows the 'Add General Facility Information' form. It starts with a 'REQUIRED' section. Under '\*Type of Facility:', there are four radio button options: 'A single facility for which my organization owns or manages 90% or more of the floor area.', 'A portion of a single facility for which my organization owns or manages less than 90% of the floor area.', 'A hospital composed of a single facility or collection of facilities.', and 'A municipal wastewater treatment plant or water treatment and distribution utility'. Below that is the question '\*Is this facility owned, operated or leased by the Federal government? (what is this?)' with 'No' and 'Yes' radio button options. Further down, there are input fields for '\*Country:' (set to 'United States'), '\*Facility Name:', and '\*Address:'.

3. At the bottom of this screen, click “Add/Edit Contacts and Organizations” to add the organization that owns the facility that is being described. (Figure 2.2)

Figure 2.2

The screenshot shows the bottom section of the form. It includes a dropdown menu labeled 'Select Organization' with a blue arrow. Below it, the link 'Add/Edit Contacts and Organizations' is circled in yellow. There is also a dropdown menu for 'Select SPP'. Below that is a 'Notes:' section with a large text area. At the bottom right, there are 'CANCEL' and 'SAVE' buttons. A note at the bottom states: 'This field is optional and can be used to record any information (up to 1000 characters) pertaining to this facility.'

4. On the next page, click “Add New Organization”. (Figure 2.3)

**Figure 2.3**

[Add New Organization](#)

Organization	Address
No Organizations Found	

[Add New Contact](#)

Contact Name	Organization
No Contacts Found	

DONE

5. Fill in the required information about the owner of the facility. If your business/organization is the owner, fill in that information. Click “Save” when done. (Figure 2.4)

**Figure 2.4**

**Add Organization**

REQUIRED

\*Organization:

\*Address:

\*City:

\*State:

\*ZIP Code:

Country:

\*Phone:

Extension:

Fax:

Web Address:

\* Is this Organization an ENERGY STAR Partner?  Yes  No  Don't Know

CANCEL SAVE

6. Click “Done” on the next page. (Figure 2.5)

**Figure 2.5**

[Add New Organization](#)

Organization	Address	
Sample	***** Dubuque, IA 52001	<a href="#">Add Contact</a> <a href="#">Edit Org</a> <a href="#">Delete Org</a>

[Add New Contact](#)

Contact Name	Organization
No Contacts Found	

DONE

7. You will be returned to the page where you need to select who owns the facility. Click “Select Organization” and select the organization that was just added. (Figure 2.6)

Figure 2.6

Select the Organization that owns this facility: [Add/Edit Contacts and Organizations](#) **Select Organization**

\* Is there an energy efficiency Service and Product Provider assisting with benchmarking this building? **Select SPP**

If no SPP is managing data for this facility, select "None". If this facility's SPP is not displayed, [Add/Edit Contacts and Organizations](#) to add the facility's SPP to the drop-down menu.

Notes:

This field is optional and can be used to record any information (up to 1000 characters) pertaining to this facility.

**CANCEL** **SAVE**

8. Next click the “Select SPP” and select “None”. (Figure 2.6)

9. Click “Save”. The property has now been added to your portfolio. (Figure 2.6)

10. After saving, the created property’s page will be loaded. If you wish to add another property click “My Portfolio”. (Figure 2.7)

Figure 2.7

**energy** **PORTFOLIO MANAGER**

ENERGY STAR

[Home](#) **My Portfolio** > [Sample Facility](#)

Facility Summary: **Sample Facility**

[How do I use this page?](#)

Building ID: 1941420  
Level of Access: Building Data Administrator

Electric Distribution Utility: Dominion - Virginia Electric & Power Co  
Regional Power Grid: [SERC Virginia/Carolina](#)  
[Select my Power Generation Plant](#) to calculate my electric emissions rate  
Electric Emissions Rate (kgCO<sub>2</sub>e/MBtu): 151.7 ([what is this?](#))

[Generate a Statement of Energy Performance](#) for uses other than applying for the ENERGY STAR.

11. Clicking this will bring you back to your portfolio. Repeat the “Adding Properties” instructions to add as many properties as needed.

Each property that is added will have its own page where it can be managed separately.

# Defining the Property

Now that the property has been listed with the EPA, the type of property, size, and other features need to be described.

Figure 3.1

1. On the “My Portfolio” page, click on a listed property. (Figure 3.1)

The screenshot shows the 'PORTFOLIO MANAGER' interface. The 'My Portfolio' link is circled in yellow. Below it is a 'Portfolio Averages' summary table:

Portfolio Averages	
Baseline Rating: 82 Facilities Included: 1	Current Rating: 82 Facilities Included: 1
Change from Baseline: Portfolio Adjusted Percent Energy Use (%): 0% Facilities Included: 1	
Averages are weighted by Total Floor Space. <a href="#">More about Baselines</a> <a href="#">More about Change from Baseline: Adjusted Energy Use</a>	

Figure 3.2

The screenshot shows the facility list interface. It includes search filters for 'GROUP: All Facilities' and 'VIEW: Summary: Facilities'. A search bar is present with the text 'Search Facility Name:'. Below the search bar is a table with the following columns: Facility Name, Current Rating (1-100), Change from Baseline: Adjusted Energy Use (%), Total Floor Space (Sq. Ft.), Energy Use Alerts, Current Energy Period Ending Date, Eligibility for the ENERGY STAR, and Last Modified. The table contains one row with the following data: Sample, N/A, N/A, 0, N/A, N/A, N/A. There are also 'Download in Excel' and 'Result 1 of 1' indicators.

2. After you click on a property, you will see that property’s page. Scroll down to “Space Use” and click “Add Space” (Figure 3.3)

Figure 3.3

The screenshot shows the 'Space Use' table with the 'Add Space' link circled in yellow. The table has the following columns: Space Name, Space Type, Floor Area (Sq. Ft.), % Floor Area, Alerts, and a 'Delete Space' link. The table contains the following data:

Space Name	Space Type	Floor Area (Sq. Ft.)	% Floor Area	Alerts	
Sample Space Name	Office	15,000	100		<a href="#">Delete Space</a>
Total		15,000	100		

Because more than 50% of your building is Office, your building is designated as Office within Portfolio Manager. This building may be eligible for a rating ([Click to learn more](#)). If you can see a rating for this building, please note that the rating takes into account all of the space types you have listed. If you cannot see a rating for this building, you can be compared to the national average for Office ([Click to learn more](#)).



3. Fill in the required information and click “continue”. (Figure 3.4)

**Figure 3.4**

**Add a Facility Space**

This facility must have at least one defined space and all defined space(s) must account for 100% of the facility's floor area combined. Define more than one space if:

- 1) A portion of the facility is unique (e.g., a restaurant within a building predominantly used as an office building). Does not apply to hospitals.
- 2) Usage patterns are unique (e.g., one tenant uses the facility much longer hours than others). Does not apply to hospitals.

Note: If your space is not listed below, please select "Other." You will have an opportunity to further define your "Other" space on the following page. [More information about selecting space types](#)

**REQUIRED**

\*Enter a Name for this Space:

\*Select a Space Type:

\*Enter the Effective Date (MM/DD/YYYY) for this Space.  
The Effective Date is used by Portfolio Manager to determine the starting date for including this Space's attributes in the overall calculation of the facility's energy performance rating:

CANCEL CONTINUE

4. Enter the required information and click “Save”. (Figure 3.5)

**Figure 3.5**

Space Attribute	Space Attribute Value (Temporary values should only be used if an Actual value is not currently known) <small>What is this?</small>	Use Default Value	Units	Effective Date (when this Attribute Value was first true) <small>What is this?</small> (MM/DD/YYYY)
*Gross Floor Area	<input type="text"/> <input type="checkbox"/> For Temporary Use?	N/A	Sq. Ft.	<input type="text" value="12/19/2009"/>
*Weekly operating hours	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	Hours	<input type="text" value="12/19/2009"/>
*Workers on Main Shift	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="12/19/2009"/>
*Number of PCs	<input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="12/19/2009"/>
*What percent of this space is air-conditioned?	Select <input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="12/19/2009"/>
*What percent of this space is heated?	Select <input type="text"/> <input type="checkbox"/> For Temporary Use?	<input type="checkbox"/>	No Units	<input type="text" value="12/19/2009"/>

CANCEL SAVE

5. To add more properties, repeat steps 1 through 4.

# Tracking Resources

## Energy Meter

1. On the “My Portfolio” page, click on a property.

Figure 4.1

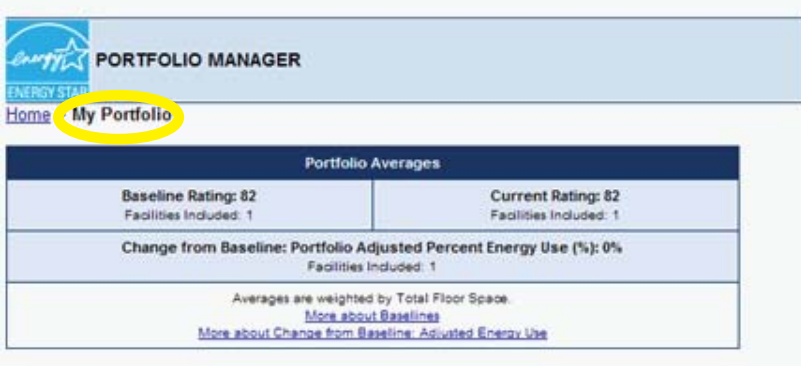
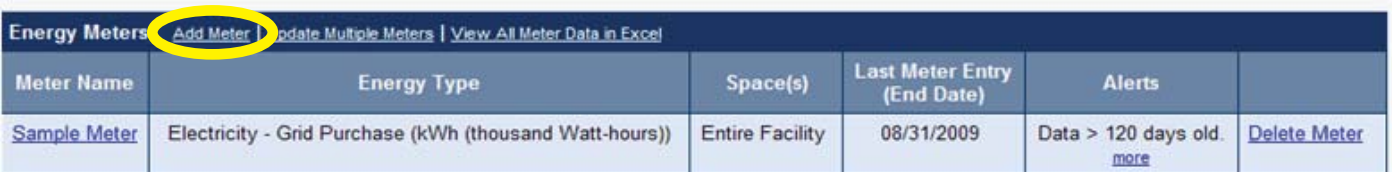


Figure 4.2



2. On property’s page, click “Add Meter”. (Figure 4.3)

Figure 4.3





3. Enter a name for the meter and then select what type of energy the meter is tracking by finding it under “Select an Energy Type”. (Figure 4.4)

4. After selecting the energy type, enter the unit of measurement. Search for it in the “Select Units” bar. You may have to look at old energy bills to find the unit or check your meter. (Figure 4.4)

Figure 4.4

**Add Facility Energy Meter: Sample Facility**

To add a meter, enter the name and select **Select an Energy Type** for the meter.

If you are entering temporary values for energy use, select "Yes" and enter the date range the values will be considered as temporary.

**REQUIRED**

**Add Energy Meter**

\*Enter the Meter Name:

\*Apply this meter to the following (checkboxes):

- Entire facility
- 13123
- Sample Space Name

Select the Meter Type:

\*Energy Type: **Select an Energy Type**

\*Units: **Select Units**

\*Add this Meter to Total Facility Energy Use?

- Yes, calculate this facility's total energy use by including this meter
- No, adding this meter to this facility's total energy use will inflate the actual value

Is this meter currently active?

- Yes
- No

Figure 4.5

Select Number of Meter Entries to be added and Start Date for first entry:

Meter Entries to Add	* Start Date (MM/DD/YYYY)	Energy Type	Units
12 <input type="button" value="v"/> Month(s) <input type="button" value="v"/>	<input type="text"/>	Coke	kBtu (thousand Btu)

**DO NOT ADD METER ENTRIES** **CONTINUE**

6. Enter all of the data that is available. Click “Save”. (Figure 4.6)

Figure 4.6

Add Energy Use:

Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Energy Use (ccf (hundred cubic feet))	Cost - US Dollars (optional)
10/18/2008	11/17/2008		\$
11/18/2008	12/17/2008		\$
12/18/2008	01/17/2009		\$
01/18/2009	02/17/2009		\$
02/18/2009	03/17/2009		\$
03/18/2009	04/17/2009		\$
04/18/2009	05/17/2009		\$
05/18/2009	06/17/2009		\$
06/18/2009	07/17/2009		\$
07/18/2009	08/17/2009		\$
08/18/2009	09/17/2009		\$
09/18/2009	10/17/2009		\$

CANCEL SAVE

7. Repeat 1 through 6 to add all meters at site.

### Water Meter

1. On the “My Portfolio” page, click on a property.

Figure 5.1

**PORTFOLIO MANAGER**

Home **My Portfolio**

**Portfolio Averages**

Baseline Rating: 82  
Facilities Included: 1

Current Rating: 82  
Facilities Included: 1

Change from Baseline: Portfolio Adjusted Percent Energy Use (%): 0%  
Facilities Included: 1

Averages are weighted by Total Floor Space.  
[More about Baselines](#)  
[More about Change from Baseline, Adjusted Energy Use](#)

Figure 5.2

GROUP: All Facilities [Create Group](#) | [View All](#)      VIEW: Summary: Facilities [Create View](#) | [Edit View](#) | [View All](#)

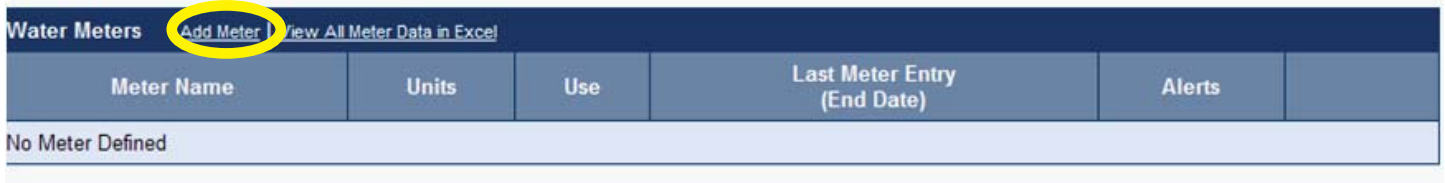
[Download in Excel](#)      Search Facility Name:  [Search](#)

Result 1 of 1      All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Facility Name	Current Rating (1-100)	Change from Baseline: Adjusted Energy Use (%)	Total Floor Space (Sq. Ft.)	Energy Use Alerts	Current Energy Period Ending Date	Eligibility for the ENERGY STAR	Last Modified
<a href="#">Sample</a>	N/A	N/A	0			N/A	

2. Scroll down to the “Water Meter” section and click “Add Meter”. (Figure 5.3)

Figure 5.3



Meter Name	Units	Use	Last Meter Entry (End Date)	Alerts
No Meter Defined				

3. Name the meter and fill out the required information. Look at the meter or old water bills to determine how usage is measured and then select the appropriate units in the “Select Units” bar. (Figure 5.4)

Figure 5.4



**Add Facility Water Meter: Sample Facility**

Use Portfolio Manager to track your facility's water use. To view this information, select the Water Use view on the Facility Summary or Portfolio View pages.

Note that entering water use information will not affect your facility's energy performance rating.

**REQUIRED**

**Add Water Meter**

\*Meter Name:

\*Select the type of water use:

Indoor

Outdoor

Or

Wastewater/Sewer

\*Units:  Select Units

\*Add this meter to Total Facility Water Use?

Yes, calculate this total water use by including this meter

No, adding this meter to this total water use will inflate the actual value

CANCEL SAVE

4. Enter the earliest date and the number of entries that you have data for and click “Continue”. (Figure 5.5)

Figure 5.5



**Water Meter: Sample**

**REQUIRED**

Select Number of Meter Entries to be added and Start Date for first entry:

Meter Entries to Add	Start Date (MM/DD/YYYY)	Units
12 <input type="text"/> Month(s) <input type="text"/>	<input type="text"/>	ccf (hundred cubic feet)

CANCEL **CONTINUE**

5. Enter all of the data that is available. Click “Save”. (Figure 5.6)

Add Water Use:			
Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Water Use (ccf (hundred cubic feet))	Cost - US Dollars (optional)
12/19/1988	01/18/1989		\$
01/19/1989	02/18/1989		\$
02/19/1989	03/18/1989		\$
03/19/1989	04/18/1989		\$
04/19/1989	05/18/1989		\$
05/19/1989	06/18/1989		\$
06/19/1989	07/18/1989		\$
07/19/1989	08/18/1989		\$
08/19/1989	09/18/1989		\$
09/19/1989	10/18/1989		\$
10/19/1989	11/18/1989		\$
11/19/1989	12/18/1989		\$

CANCEL **SAVE**

6. Repeat steps 1 through 5 to add another water meter.

## Updating Meters

1. On the “My Portfolio” page, click on a property. (Figure 6.1)

Figure 6.1

The screenshot shows the 'Portfolio Manager' interface. At the top left is the 'Energy Star' logo. Below it are navigation links for 'Home' and 'My Portfolio', with 'My Portfolio' circled in yellow. The main content area is titled 'Portfolio Averages' and contains the following information:

Baseline Rating: 82 Facilities Included: 1	Current Rating: 82 Facilities Included: 1
Change from Baseline: Portfolio Adjusted Percent Energy Use (%): 0% Facilities Included: 1	
Averages are weighted by Total Floor Space. <a href="#">More about Baselines</a> <a href="#">More about Change from Baseline: Adjusted Energy Use</a>	

Figure 6.2

Water Meters   <a href="#">Add Meter</a>   <a href="#">View All Meter Data in Excel</a>					
Meter Name	Units	Use	Last Meter Entry (End Date)	Alerts	
<a href="#">Sample</a>	ccf (hundred cubic feet)	Indoor			<a href="#">Delete Meter</a>

2. A list of the old entries will pop up. Right above the entries you will see “Add Meter Entries”. Click on this. (Figure 6.3)

Figure 6.3

Edit Water Use:					<a href="#">Download Meter Data in Excel</a>
Remove Entry	Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Water Use (ccf (hundred cubic feet))	Cost - US Dollars (optional)	Last Updated By
<input type="checkbox"/>	11/19/1989	12/18/1989	0	\$0	CEUDALEY
<input type="checkbox"/>	10/19/1989	11/18/1989	0	\$0	CEUDALEY
<input type="checkbox"/>	09/19/1989	10/18/1989	0	\$0	CEUDALEY
<input type="checkbox"/>	08/19/1989	09/18/1989	0	\$0	CEUDALEY
<input type="checkbox"/>	07/19/1989	08/18/1989	0	\$0	CEUDALEY

3. Enter the number of new entries you will make and the date that they start. (Figure 6.4)

Figure 6.4

Water Meter: Water Meter

REQUIRED

Select Number of Meter Entries to be added and Start Date for first entry:

Meter Entries to Add	Start Date (MM/DD/YYYY)	Units
12 <input type="button" value="Month(s)"/> ▼	11/01/2009	cf (cubic feet)

4. Fill in the new data and click “Save”. (Figure 6.5)

Figure 6.5

Add Water Use:				
Start Date (MM/DD/YYYY)	End Date (MM/DD/YYYY)	Water Use (cf (cubic feet))	Cost - US Dollars (optional)	
11/01/2009	11/30/2009		\$	
12/01/2009	12/31/2009		\$	
01/01/2010	01/31/2010		\$	
02/01/2010	02/28/2010		\$	
03/01/2010	03/31/2010		\$	
04/01/2010	04/30/2010		\$	
05/01/2010	05/31/2010		\$	
06/01/2010	06/30/2010		\$	
07/01/2010	07/31/2010		\$	
08/01/2010	08/31/2010		\$	
09/01/2010	09/30/2010		\$	
10/01/2010	10/31/2010		\$	

The meters are now up to date. Both energy and water meters have the same process for updating.