

## Entering and Managing Facilities Data in EPA's Portfolio Manager

EPA's Portfolio Manager is an online energy performance rating system used to measure and track building energy consumption. The following sections will assist you in using Portfolio Manager to enter and manage your facilities' data.

Steps involved in using Portfolio Manager discussed in this document are as follows:

[Step 1: Accessing Portfolio Manager](#)

[Step 2: Identifying where facilities \(buildings\) are listed](#)

[Step 3: Verifying accuracy of facility information/ Replacing temporary values with permanent values](#)

[Step 4: Adding/editing facilities](#)

[Step 5: Adding/editing spaces](#)

[Step 6: Adding/editing meters](#)

[Step 7: Adding energy use data \(meter entries\)](#)

[Step 8: Sharing your account](#)

### Step 1: Accessing Portfolio Manager

- Go to <https://www.energystar.gov/istar/pmpam/> and enter your **Username** and **Password** in the login fields on the right-hand side of the Web page.
- Click the **Login** button to access your account and then select the [Access My Portfolio >](#) link. You are now in the "My Portfolio" view. This view provides a listing of facilities in your account. Actions that can be invoked from this page include: adding facilities, setting up Leaders accounts, sharing facilities, updating multiple meters, and requesting energy performance reports.

### Step 2: Identifying where facilities (buildings) are listed

- Your facilities are listed individually in the first column (**Facility Name** column) of the table at the bottom of the "My Portfolio" page. Click on an individual building name (hyperlink) to enter the "Facility Summary" for that particular building.

### Step 3: Verifying accuracy of facility information/ Replacing temporary values with permanent values

- When you select a space from the "Facility Summary," the "Current Space Attribute Values" section contains values for Gross Floor Area, Occupants, Number of PCs, and Operating Hours/Week. Many of these values are default values temporarily entered based on calculations from each building's gross floor area. These values need to be modified.
- Click [Edit](#) to modify the values for the space characteristics. The **Edit Space Attribute** form will appear.
  - Enter the new space attribute value and select the **Correct Attribute** radio button. If you are updating an attribute in the future, select the **Update Attribute** radio button if there has been a change in the way the space is used. Updates to attributes will be tracked.
  - Enter a start date for a new attribute (e.g., the date a new A/C system was installed). Click the **SAVE** button when finished.
- If you do not know the exact value for a facility space attribute, you may enter a temporary value. To do this, enter the information, check the **For temporary use?** checkbox and click the **SAVE** button when finished.
- When possible, you should replace temporary values with permanent (actual) values. To do this, repeat the step above to modify the values and uncheck the **For temporary use?** checkbox. Click the **SAVE** button when finished.

### Step 4: Adding/editing facilities

- Should you need to add additional facilities to your account, in the "My Portfolio" view, click on [Add Facility](#) to add a facility. You will be directed to an **Add General Facility Information** form.
- Enter the required information and click the **SAVE** button when finished. Note that required fields are denoted by red asterisks.

- To edit a facility, click on the facility name. This will direct you to the “Facility Summary” view and allow you to edit information pertaining to the building, such as space use and energy data. See Steps 5, 6 & 7 for more details.

#### Step 5: Adding/editing spaces

- Should you need to add additional spaces to your facilities, click on [Add Space](#) in the Space Use section in the “Facility Summary” view. The **Add a Facility Space Type** form will appear.
  - Enter a name for the space and use the drop-down menu to select the type of space.
  - Enter an Effective Date for this space data. This is usually the date of construction or the most recent renovation.
  - After entering the required information on the form, click the **CONTINUE** button. You will be directed to a new page where you will need to enter space characteristics. Enter the necessary information and click **SAVE** when finished.
- To edit a space in a facility, click on the name of the space in the “Space Use” section.

#### Step 6: Adding/editing meters

- In the “Facility Summary” view, click on [Add Meter](#) in the Energy Meters section of the page. The **Add Meter** form will appear.
- Enter a name for the meter (UtilityAccountNumber\*MeterID) and complete the required information (required fields are denoted by red asterisks). You may indicate a temporary value, but will need to enter the actual value for energy data later. The temporary value feature should only be used if the actual meter readings for a specific period of time are unknown, but you would still like to be able to estimate the energy performance for that period.
- Click the **SAVE** button when finished.

#### Step 7: Adding energy use data (meter entries)

- In the “Facility Summary” view, click on the name of the meter for which you wish to add energy data in the Energy Meters section (note that you may also place a check the **Remove Entry** checkbox if you wish to delete meter entries).
- Click on [Add Meter Entries](#) in the Edit Energy Use section. An **Add Meter Entries** form will appear. Use the drop-down menu to select the number of months you wish to add and enter the starting date. Click the **CONTINUE** button.
- Enter the energy use data and cost data (optional) for each month. Click the **SAVE** button when finished.

#### Step 8: Sharing your account

- In the “My Portfolio” view, click on [Share Facilities](#). A **Select User or Master Account** form will appear. Manually enter or select the Portfolio Manager and Portfolio Master Account from the drop-down menu to which you are providing access (i.e., OhioMaster). Click **ADD AND MODIFY**.
- Select the level of permissions you would like the Master Account Manager to have (select Facility/Profile Editor).
- Select the optional rights that you would like to give to the Master Account (Allow the Master Account to set a baseline for the shared facilities and to provide access to shared facilities to other users by selecting “Yes” for these categories. To allow a Master Account user to delete shared facilities, select “Yes” for the third optional right category).
- Specify the group from the Master Account to place the shared facility(ies) and click **CONTINUE**.
- Select the facilities that you would like to share with the Master Account by checking the boxes next to the facilities you would like to share or check the **select all** checkbox to share all facilities. Click **CONTINUE**.
- On the next screen, verify that all access changes are correct. If they are not, click **CANCEL** to return to the previous screen. If they are correct, click the **SAVE** button.