



Using Portfolio Manager to Track Small Business Energy Performance

[Portfolio Manager](#) is an online data management tool that helps track and measure a building's energy use. Portfolio Manager can calculate the energy intensity of a particular building while taking into account changes in weather. Once a baseline is established, Portfolio Manager can calculate the percent energy use reduction to track progress towards your goals.

Step 1: Set Up Your Portfolio Manager Account

- Go to <https://www.energystar.gov/istar/pmpam/>
- For new users, click the link to [Register](#) at the upper right hand corner
 - For returning account holders, enter your User Name and Password and click “Login” at the upper right hand corner
- Enter the required information in the boxes (User Name, Password, Email, etc.)
- Click SAVE PROFILE to complete your account set up

Step 2: Add a Building

- From the Welcome page, click “Access My Portfolio”
- From the “My Portfolio” page, click “Add A Property” to add a building to your portfolio
- Enter the facility information and click SAVE.

Note: Once you add a building, you can edit the general facility information by clicking the “Edit” link in the “General Information” section of the “Facility Summary” view.

Also, please ignore the column entitled “Eligibility for the ENERGY STAR”, which talks about rating your building.

Step 3: Add Building Characteristics

- From the “Facility Summary” page of your building, click on “Add Space” in the [Space Use](#) section
- Enter a name for the space
- For “space type” please select the appropriate type on the drop-down menu of space types, select the “other” space type if your building does not fit one of the drop-down categories. If you are a manufacturer you would select other as a space type.
- Indicate an Effective Date for this space data. This is usually the date of construction or the most recent major renovation of the building
- Click CONTINUE

Note: On the drop down menu for “select Other category”.

- Enter the space attributes in the boxes (gross floor area, number of occupants, number of personal computers in use, operating hours/week, and the date of building construction or the last major renovation)
- Click SAVE

Note: The attributes vary by building type. If the precise information is unavailable, you may check the box designating it as a temporary value.

Step 4: Add Energy Use-Type Information

- From the “Facility Summary” page of your building, click on “Add Meter” in the Energy Meters section
- Enter a name for the meter. This field may contain letters, numbers, or your utility service agreement number (e.g., Electric, Natural Gas, 10002748, etc.)
- Select the meter type and units from the corresponding drop-down menus.
By default, the meter applies to the entire facility unless otherwise specified. It could also only apply to one of the spaces entered earlier. Check as appropriate
- Verify the statements confirming that the meters serve the facilities, and that they are active
- Click SAVE.
- Repeat Step 4 to create one meter for each fuel type used in the facility

Step 5: Add Energy Use Consumption & Billing Information

- Select the number of months of utility data to enter from “Meter Entries to Add” drop-down menu
- Enter the starting date using the MM/DD/YYYY format
- Click CONTINUE

Note: Portfolio Manager will automatically create fields with the start and end dates for each period

- Enter the total energy consumed that period and the total cost for each month. If the beginning and ending dates do not match your utility bill, make the appropriate changes
- Click SAVE.

Step 6: Share Your Data With PA DEP

Step 1:

- From the My Portfolio page, choose “Share Facilities.”
- From the “Select a Portfolio Master Account” drop down menu, select **PADEP-PASMALLBUSINESS** to share your buildings. Click CONTINUE.

Step 2:

- Select the appropriate access role. Please select “Read Only” for sharing with PADEP-PASMALLBUSINESS and “No” for the other Optional Rights.

Note: Sharing your buildings with a Master Account will only allow access to your account for you and the Master Account holder, not for others who share with the Master Account.

Step 3:

- Choose the appropriate Facility Group within the Master Account. Click CONTINUE.

Step 4:

- Select the facilities to share with the Master Account. You may select all or some of your facilities to share with the Master Account by checking the box to the left of each facility you wish to share. Click CONTINUE.

Step 5:

- Confirm that all access changes are correct. Review the list of facilities shared and access privileges granted. If facilities or access changes are incorrect, you may return to the previous screen(s) by selecting CANCEL.
- Once you have reviewed the changes, click SAVE.

Congratulations! You may now track your building(s)’s energy use with Portfolio Manager.

For additional information:

- Check out the [Portfolio Manager Overview](#)
- Take the [Portfolio Manager Tour](#)
- Watch a live or pre-recorded [Portfolio Manager Training Session](#)
- Click the HELP or CONTACT US buttons on the Portfolio Manager menu bar.