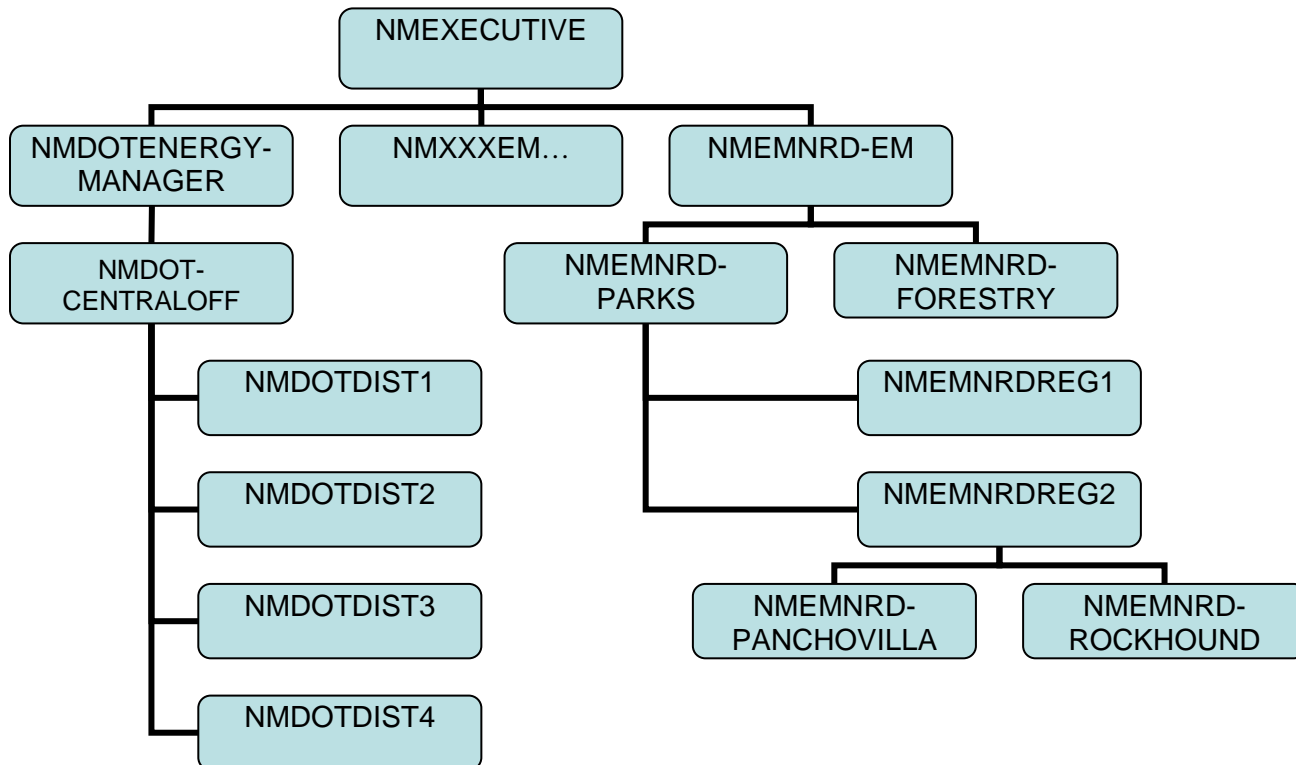


## Standards for using Portfolio Manager in New Mexico State Government

**Portfolio Manager Username** - Usernames are to be based upon hierarchy in Agency so that they can persist even if individuals leave or are given other duties. Here is a schematic of how the naming convention should work – note the NM in each name and the understandable role that each account plays. The specifics of your agency will determine how your account names are setup. Someone in your agency should keep a listing of the usernames and passwords for the different accounts to facilitate updating as staff turns over or roles change.



**Campus and Building Names** – Use whatever names make sense to your organization. These will sort alphabetically based on the name and they can be changed and edited. It is important to check the “Use Temporary Values” if you are not confident about the accuracy of the data. This will flag those buildings and campuses with a message that temporary data is being used and remind you that some research and correct info should be entered.

**Meter Names** – Use the following naming convention for naming meters. Start the name with the energy supply company (like “PNM” or “Wasatch” or “ElPaso”) and add a hyphen and then use the account number. For PNM, the seven digit premise code uniquely identifies energy from a single meter. So an example of an electricity meter name would be **PNM-0430587** and a gas meter name might be **Wasatch-1235567**. Note the leading zero for the PNM meter. That is because this is based upon their seven digit premise code and it is necessary to use the leading zero if you use the “View My Bill” feature of [www.pnm.com](http://www.pnm.com). Look at your utility bills and the help information in Portfolio Manager to determine which units of energy to use. In many cases it will be **kWh** for electricity and **therms** for natural gas.

**Meter Entries** – Once the campuses, buildings and meters are entered, the ongoing work of entering energy consumption data is very straightforward. It is important to enter the energy quantities accurately and we in New Mexico are standardizing on how we enter the cost of the energy. For the cost of the energy purchased, please enter the Total Current Charges, which will include the cost of any franchise fees and renewable energy charges. This will allow for a better comparison between the cost reports from Portfolio Manager and SHARE. The amount of Renewable Power purchased will not be tracked in Portfolio Manager because the reporting capabilities are not sufficient but instead will be tracked on spreadsheets. You may also be assigned to track renewable energy purchases so please be sure to contact the Lead by Example Coordinator for instructions on that.

See below for examples of how the Portfolio Manager entries are made for an electric bill from PNM.

Energy Meter: PNM-0430587				
<div style="float: right; border: 1px solid black; padding: 5px;"> <b>i</b> Meter Information                      Fuel Type: Electricity (kWh (thousand Watt-hours))                      Space(s): Entire Facility                      Active: Yes                 </div>				
<a href="#">View All Energy Use Entries</a>		<a href="#">Download Meter Data in Excel</a>		
Start Date	End Date	Energy Use	Cost - US Dollars	Last Updated By
06/01/2008	06/30/2008	93,600.00	\$10,594.68	NMGSDBSD
05/01/2008	05/31/2008	79,800.00	\$8,221.68	NMGSDBSD

The meter number in Portfolio Manager is PNM-0430587. You can see that this is from the premise code on the PNM Bill. The “Current Charges” on the PNM bill are \$10,594.68 and this is entered as the Cost in Portfolio Manager. The “kWh Used” on the PNM bill is entered as the “Energy Use” in Portfolio Manager. The dates do not need to be exactly the same on the bill and in Portfolio Manager. Since Portfolio Manager automatically creates the monthly dates, it is OK if they are a day or two off.

Billing Summary		Payments Received Since Last Statement (Thank You)	\$14,856.19
Current Charges		Electric Service	\$10,594.68
Total Amount Due			<b>\$10,594.68</b>

Service # 100 Electric		Meter Reading	Meter Read Date	Days Billed	Meter Readings Present	Meter Readings Previous	Meter Constant	kWh Used
Meter #0438757	Actual	01-JUL-2008	29	8901	-	8433	X 200.000 =	<b>93600.000</b>

Non-Res, General Power TOU - EN0K

**Account Sharing** – Portfolio Manager allows building and energy information to be shared among users. Depending upon your agency setup you will want to share your data with at least one other account in your agency. From your “My Portfolio” page click the “Share Facilities” link and follow the wizard. Give your other agency account the access options as in the image below. This will allow both accounts to be able to update and enter data.

STEP 2: Select the set of Access Rights you want to provide this User.	
Access Role	Access Rights
<input checked="" type="radio"/> Facility/Profile Editor	(1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; (4) Create/Edit a Building Profile
<input type="radio"/> Facility Editor	1) Edit all Data for this Facility; (2) Generate a Statement of Energy Performance; (3) Submit an ENERGY STAR Building Application; May NOT create/edit a Building Profile
<input type="radio"/> Profile Editor	1) Create/Edit a Building Profile; May NOT edit any other data for this facility, generate a Statement of Energy Performance or submit an ENERGY STAR Building Application
<input type="radio"/> Read Only	Read Access only; May NOT edit any data for this facility, generate a Statement of Energy Performance, submit an ENERGY STAR Building Application or create/edit a Building Profile
Optional Rights (rights that are added to the selected access role)	
Can this user set a baseline for the shared facilities? <input checked="" type="radio"/> Yes <input type="radio"/> No (Note: There is only one baseline date per facility.)	
Can this user provide access to the shared facilities with other users? <input checked="" type="radio"/> Yes <input type="radio"/> No (Note: A user cannot delegate any access role greater than their own. See table above. All users who are given this right will be able to assign this right to other users.)	
Can this user delete the shared facilities from your account? <input checked="" type="radio"/> Yes <input type="radio"/> No (Note: This right is reserved only for Facility/Profile Editors or Facility Editors.)	

**Please also make sure to share your agency information with the State’s master account.** You can do this on the first sharing screen either by typing in NMEXECUTIVE to the “Enter Portfolio Manager Username:” field or by selecting “New Mexico State Government – NMEXECUTIVE” from the “Select a Portfolio Manager Master Account:” field.

Share your facilities to the Master Account with “Read Only” access. Please select “Yes” to the first two questions and “No” to the third. Note that the NMEXECUTIVE account has groups named for each agency and you should share all of your facilities into the proper group that reflects your agency.

**STEP 3: Specify the group from this user’s account to place the shared facility(ies).** [Learn more](#) about sharing into groups.

Main Portfolio

On the final screen, select the “All Facilities” checkbox and press the SAVE button.

If you have questions about your use of Portfolio Manager, please contact the Energy Efficiency Lead by Example Coordinator, Erik Aaboe at 827-0676 or by email to [erik.aaboe@state.nm.us](mailto:erik.aaboe@state.nm.us)