ENERGY STAR® Portfolio Manager®

“How To” Series

How to Get Utility Data Into Portfolio Manager®

The ENERGY STAR Portfolio Manager tool helps you measure and track the energy and water use, waste and materials, and greenhouse gas emissions of your buildings, all in a secure on-line environment. You can use the tool to identify underperforming buildings, set investment priorities, verify efficiency improvements, and receive recognition for superior energy performance.

Entering utility data is quick and easy with Portfolio Manager. There are three ways to enter energy, water, and waste data for your property or portfolio:

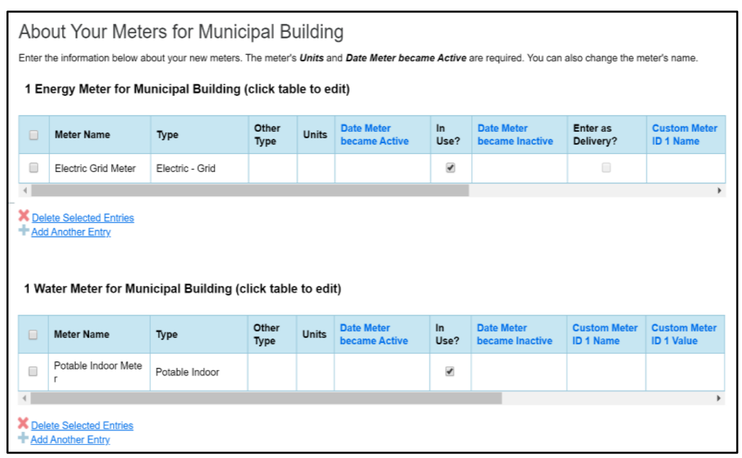
- Enter data manually (create or update one meter at a time).
- Upload data by using spreadsheet templates (create or update multiple meters at once).
- Work with third-party providers that exchange data directly with Portfolio Manager via web services.

Entering Utility Data Manually

With the help of step-by-step prompts and guidance, entering utility data manually into Portfolio Manager is easy. Follow these steps to add meters and enter bill data for any property in your Portfolio Manager account, including newly added properties, as well as those that have been in your portfolio for a while.

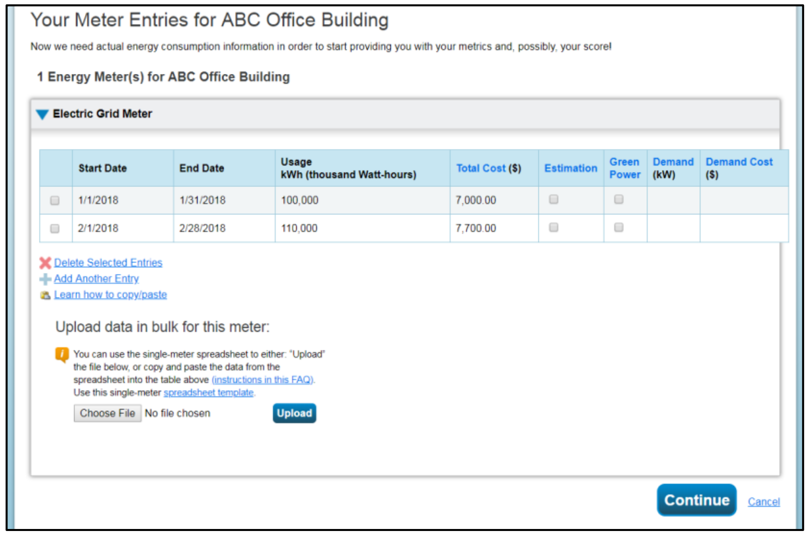
Creating a New Meter (or Meters)

On the main page of your property, click the **Energy**, **Water**, or **Waste & Materials** tab.



1. Click **Add A Meter**. Select the energy, water, or waste sources that apply to your property. For energy and water meters, select relevant sources, indicate how many meters you want to add for each resource type, and then click **Get Started!** For waste meters, select the waste type and what you do with it, then click **Continue**. Then indicate how often it is collected and when you started tracking. Click **Create Meter(s)**, and proceed to Step 3.

2. For energy or water meters, click on any empty cell in the table to edit information on the **About Your Meters** page.



   a. Choose the appropriate units, and then enter the start date of the first bill associated with each meter in the **Date Meter became Active** column.
   b. If the meter is currently in use at the property, make sure the **In Use?** box is selected and leave the **Date Meter became Inactive** field empty.
   c. Select the **Enter as Delivery?** checkbox if your energy source is obtained or delivered in bulk quantities, as opposed to being metered (e.g. fuel oil).
   d. Add up to three custom identifiers for each meter (optional).
   e. Click **Add Another Entry** if you need to add another meter.
   f. Click **Continue.**

3. On the **Your Meter Entries** page, click **Add Another Entry** to enter bill information for each meter.
   a. Enter the start and end date and usage for each entry.
   b. Select the **Estimation** checkbox to identify an entry as a non-measured value. An example is if your utility bill was returned as an estimation of your monthly usage and you expect to update the actual consumption later, when it becomes available.
   c. For energy, select the **Green Power** checkbox if any of the energy you usedwas purchased from renewable energy sources. Provide details in the pop-up window, such as quantity, source, and generation location.
   d. For electric meters, you can choose to track demand and demand cost as optional values.
   e. For waste, you may optionally indicate the disposal destination.
   f. Once you are finished adding entries, click **Continue**.

> ***Avoid Double-counting Energy Data***
>
> To ensure your energy is not double-counted, do not select both submeters and their master meter when specifying meters to add to total consumption.

4. After you click **Continue**, you will see the **Select Meters to Include in Metrics** page. On this page, you indicate which meters Portfolio Manager should use when calculating metrics for your property.
    a. Select which meters you want to include and what the meters measure, and then click **Apply Selections.**
    b. If the utility meters listed do not cover all utility consumption at the building, indicate the sections of the properties that your meters do service.

Entering or Modifying Utility Data for Existing Meters

You can also enter utility data for existing meters in Portfolio Manager.

- On your property's main page, click the applicable meters tab. In the table below the trend chart, select the name of the meter for which you want to add or edit data.
- On the **Manage Bills (Meter Entries)** page for your meter, click anywhere in the table to edit entries. Select the checkbox next to any entry, and click **Delete Selected Entries** at the bottom of the page to delete data or click **Add Another Entry** to add more information. After you finish making changes or adding data, click **Save Bills**.

Data Errors

If there is an error in your meter data (e.g. overlaps or gaps greater than 1 day in your meter entry dates), Portfolio Manager will alert you of the error and direct you to the affected meters so you can make the necessary edits.

Using Spreadsheet Uploads

Spreadsheet templates allow you to quickly and easily upload data into Portfolio Manager using a few steps. You can upload data for a single meter, for multiple meters at one property, or for multiple meters across multiple properties.

	A	B	C	D	E	F	G
1	Start Date (Required)	End Date (Required)	Usage (Required)	Cost (Optional)	Demand (kW) (Optional)	Demand Cost ($) (Optional)	Estimation (Required)
2	01/01/2019	01/31/2019	497829	37337			No
3	02/01/2019	02/28/2019	582000	70000			No
4	03/01/2019	03/31/2019	444260	34000			No
5	04/01/2019	04/30/2019	443290	33000			No
6	05/01/2019	05/31/2019	503402	38923			No
7	06/01/2019	06/30/2019	495871	38341			No
8	07/01/2019	07/31/2019	566237	43781			No
9	08/01/2019	08/31/2019	613285	47419			No
10	09/01/2019	09/30/2019	700206	54140			No
11	10/01/2019	10/31/2019	562924	43525			No
12	11/01/2019	11/30/2019	469755	36321			No
13	12/01/2019	12/31/2019	466782	36091			No

Uploading Data for a Single Meter

Follow these steps to upload data for a single meter:

1. Click the **Energy**, **Water**, **or Waste & Materials** tab of your property, and then click **the meter name for which you want to upload data**.
2. Click **spreadsheet template** at the bottom of the page, under Upload Data in Bulk.
3. Save the spreadsheet file that loads in your browser, and then open it to enter meter information. When you are finished entering information, save the spreadsheet to your computer. **NOTE**: Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.

4. When you are ready to upload this file, go back to the **Manage Bills** page (where you originally generated the spreadsheet). You have two options:
   a. **Copy & Paste.** Copy your data (but not the header row) by highlighting it and selecting Ctrl+C, then **Paste** it into an empty Start Date field by selecting Ctrl+V. Then click Save Bills.
   b. **Upload File.** Browse to the completed template you saved on your computer, click **Open**, and then click **Upload**. Portfolio Manager then automatically enters the new meter entries for your property.

Uploading Data for Multiple Meters at One or More Properties

Follow these steps to add multiple meters and/or bills for one or more existing properties:

1. Along the left side of the **MyPortfolio** tab, click **Upload and/or update multiple properties**.
2. In the **Edit and Manage Information** section, click **Create an Upload Template.**
3. Select the task you are performing (Add Meters to Existing Properties or Add Bills to Existing Meters) and the properties you want to include in the template. Click **Create & Download Template**.
4. Save the spreadsheet file that loads in your browser, and then open it to enter required information, such as dates and energy consumption amounts. When you are finished entering information, save the spreadsheet to your computer. **NOTE:** Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.
5. When you are ready to upload the spreadsheet, go back to the **Upload and/or update multiple properties** page. In the **Upload Spreadsheets** section, select the appropriate option from the **Type of Upload** drop-down menu. Browse for the spreadsheet you saved on your computer, click **Open**, and then click **Upload**. Portfolio Manager then automatically adds the data to your portfolio.

Using Web Services

Many utilities and service providers (such as utility bill payment companies and energy consultants) may already be set up to exchange data directly with Portfolio Manager via web services. Here's how to take advantage of this offering (where available):

- Determine if your utility or service provider is capable of exchanging data with Portfolio Manager. To do so, see the list of service providers that exchange data with Portfolio Manager in Canada.
- If your utility or service provider is listed, it is possible to connect with them to enable your data to be updated using web services. Note that the utility or service provider may require further information before a connection request can be accepted, so reach out to the respective providers to ensure that you are aware of the required steps to initiate this process.

- Once your connection request has been accepted, you will be able to share specific buildings and meters with the selected utility or service provider, who can then update your data through an automated process. For more information on the connection and sharing process, see the resource Exchanging Data: Resources to Help you Get Started.
- When you connect and share with an organization for the purposes of exchanging data via web services, you may be asked specific questions, as determined by the organization, to confirm your identity and the identity of your property. Provide the requested information in order to proceed. Once your sharing request has been accepted, the organization you connected with will be able to update some or all of your property data directly into Portfolio Manager, according to the level of access you provided.

Learn More!

To learn more about Portfolio Manager, visit ENERGY STAR for Buildings.

To get answers to your questions, contact Natural Resources Canada.