ENERGY STAR
Portfolio Manager

“How To” Series

How to Get Utility Data into Portfolio Manager

EPA’s ENERGY STAR Portfolio Manager tool helps you measure and track energy use, water use, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the tool to identify under-performing buildings, set investment priorities and verify efficiency improvements.

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

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

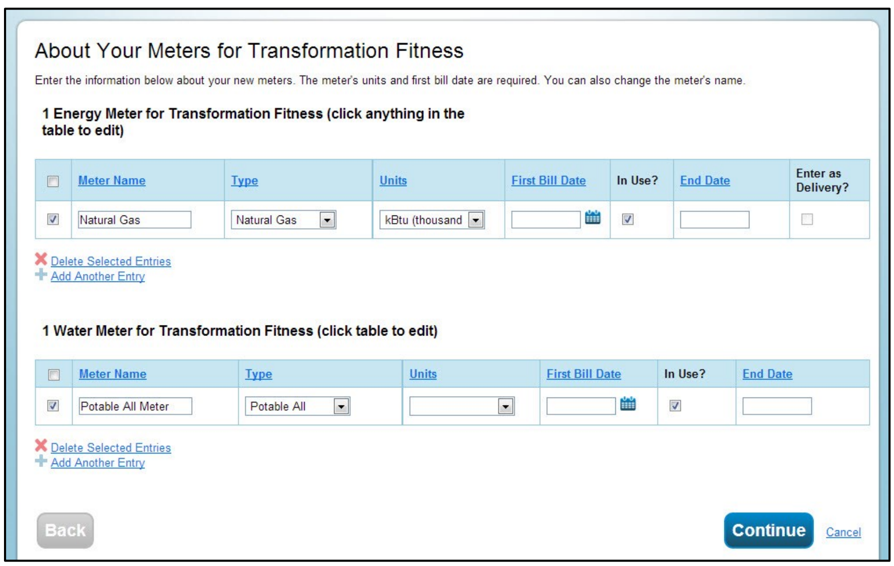
1 Entering Utility Data Manually

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 **Meters** tab.

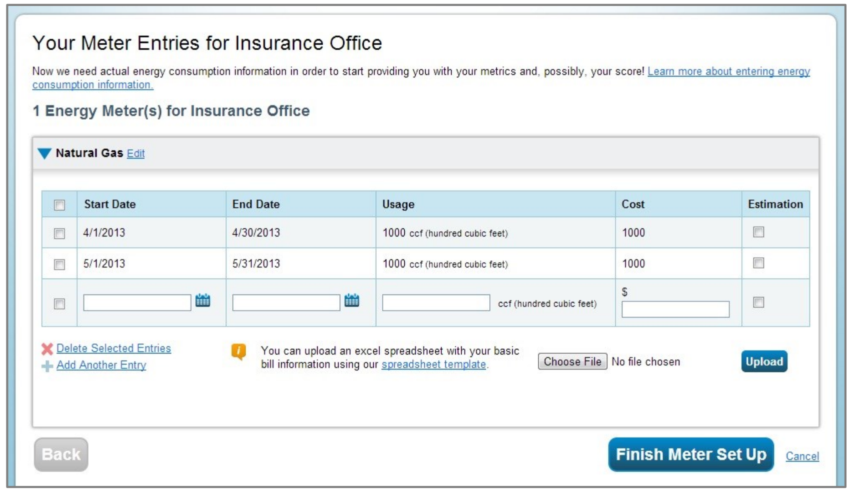
1. Click **Add Another Meter**. Select the energy and/or water sources that apply to your property. Select additional boxes as needed, indicate how many meters you want to add for each utility type, and then click **Get Started!**
2. Click on any empty cell in the table to edit information on the **About Your Meters** page.



   a. Choose the appropriate units and enter the date the meter became active for each meter.
   b. Leave the **Date Meter became Inactive** field empty if a meter is currently in use at the property.
   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. Click **Add Another Entry** if you need to add another meter.

e. 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 (e.g., 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. Select the **Green Power?** checkbox if any of your energy usage was purchased from renewable energy sources. Provide details in the pop-up window, such as quantity, source, and generation location.

   d. Click **Finish Meter Set Up**.

4. After you click **Finish Meter Set Up**, you see the **Meters to Add to Total Consumption** page. You can also access this page from the **Meters** tab by clicking **Meters for Total Consumption**. On this page, you indicate which meters Portfolio Manager should use when calculating energy metrics for your property.

   a. Select which meters you want to include and what the meters measure, and then click **Apply Selections**. **NOTE:** If the utility meters listed do not cover all energy consumption at the building, indicate the section(s) of the properties that your meters service.

Avoid Double-Counting Energy Data

To ensure that Portfolio Manager does not double-count any energy use, do not select both sub-meters and the master meter with which they are associated when specifying meters to add to total consumption.

Entering or Modifying Utility Data for Existing Meters

You can also enter utility data for existing meters in Portfolio Manager. There are several ways to access meters to enter data:

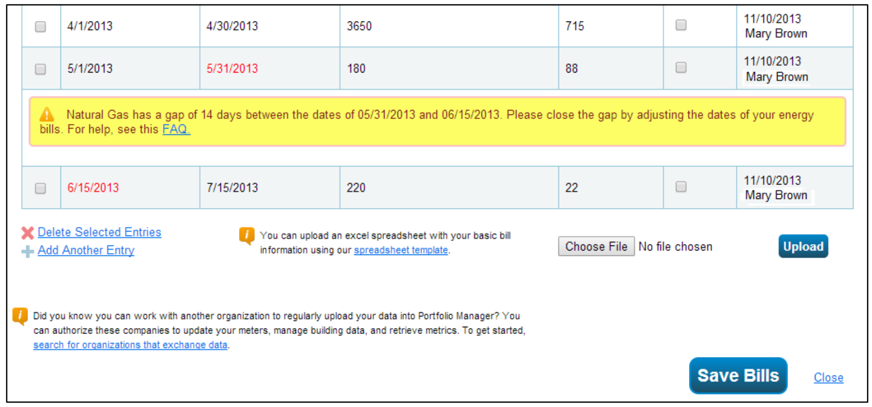
- ✓ On the **MyPortfolio** tab, select **Add/Edit Bills** from the **Action** drop-down menu of your property. Choose a meter to edit and then click **Select Meter** to display bill data.
- ✓ On your property's main page, click the **Meters** tab. Use the **Action** drop-down menu next to the meter name to edit basic meter information, view/add bills, or delete the meter. Click the meter name or select **View/Add Bills** from the **Action** drop-down menu to display bill data for that meter.
- ✓ On the **Meters** tab, click **Manage/Enter My Bills**.
  Choose a meter to edit and click **Select Meter** to display bill data.

Data Errors

If there is an error in your meter data (e.g., overlaps or gaps greater than1 day in your meter entry dates), Portfolio Manager will alert you of the error and direct you to the affected meter(s) so you can make the necessary edits.

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**.

If you have entered any bill dates with gaps or overlaps, Portfolio Manager will alert you of the error. You can choose to correct the error, or click **Save Bills** to continue. NOTE: Portfolio Manager will not calculate an ENERGY STAR score or EUI for any time period with a gap or overlap in meter dates.



2 Using Spreadsheet Uploads

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

Uploading Data for a Single Meter

Follow these steps to upload data for a single meter:

1. Click the **Meters** tab of your property, and then click **Manage/Enter My Bills**.
2. Select a meter from the drop-down menu on the **Manage Bills** page, and then click **Select Meter**.
3. Click **spreadsheet template** at the bottom of the page.
4. Save the spreadsheet file that loads in your browser, and then open it to enter meter information.

	A	B	C	D	E
1	Start Date	End Date	Usage	Cost	Estimated Value
2	1/1/2008	1/31/2008	7533	903.96	FALSE
3	2/1/2008	2/29/2008	8558	1026.96	FALSE
4	3/1/2008	3/31/2008	9437	1132.44	FALSE
5	4/1/2008	4/30/2008	10694	1283.28	FALSE
6	5/1/2008	5/31/2008	10352	1242.24	FALSE
7	6/1/2008	6/30/2008	11998	1439.76	FALSE
8	7/1/2008	7/31/2008	11509	1381.08	FALSE
9	8/1/2008	8/31/2008	500	1000	TRUE
10	9/1/2008	9/30/2008	10440	1252.8	FALSE
11	10/1/2008	10/31/2008	9063	1087.56	FALSE
12	11/1/2008	11/30/2008	8745	1049.4	FALSE
13	12/1/2008	12/31/2008	7627	915.24	FALSE
14					

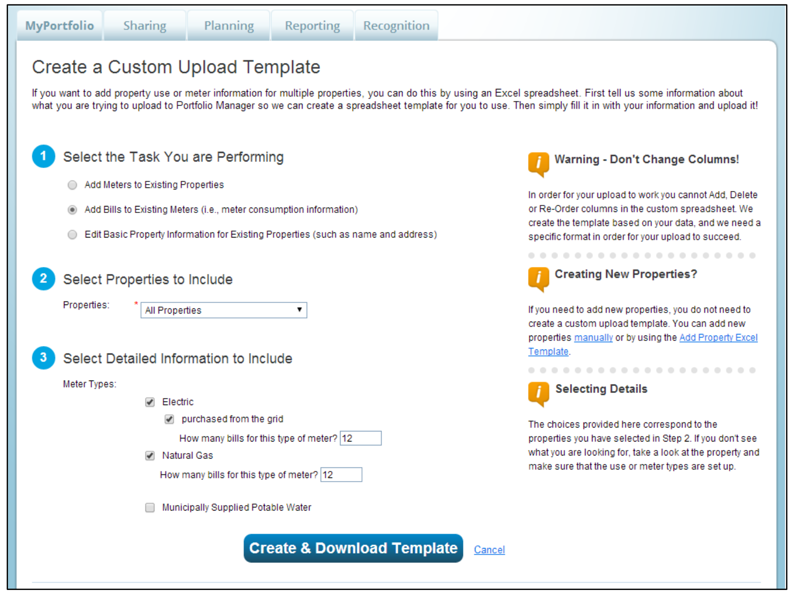
   a. Enter “FALSE” in the **Estimated Value** column if you are entering an actual meter reading.
   b. Enter “TRUE” in the **Estimated Value** column if you are entering an estimated value.
   c. When you are finished entering information, save the spreadsheet to your computer. **NOTE:** Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.

5. Click **Choose File** on the **Manage Bills** page (where you originally generated the spreadsheet). Browse for 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. Click **upload and/or update multiple properties** at the bottom of the **MyPortfolio** tab.
2. Click **Create an Upload Template** in the **Edit and Manage Information** section to create a custom template.
3. Select the task you are performing and the properties you want to include in the template. If you select **Add Meters to Existing Properties**, you can select from the full list of fuel types. If you select **Add Bills to Existing Meters**, you can select how many bills you would like to upload for each type of existing meter within your properties.



4. Click **Create & Download Template**.
5. 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.
6. Upload the spreadsheet into Portfolio Manager. In the **Upload Spreadsheets** section of the **Upload and/or Update Multiple Properties** page, 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.

For more tips and guidance on how to best use the spreadsheet uploads feature, you can view a recorded training linked here.

3 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 by clicking **search for organizations that exchange data** on the **Sharing** tab.
- ✓ If your utility or service provider is listed, then you can connect with them to enable your data to be updated using Portfolio Manager's web services. Once your connection request has been accepted, you will be able to share specific buildings and/or meters with the selected utility or service provider, who can then update your data through an automated process (for more details on the connection and sharing process, see the resource "How to Share Data with other Portfolio Manager Users").
- ✓ 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 www.nrcan.gc.ca/energystarportfoliomanager.

To get answers to your questions, e-mail info.services@nrcan-rncan.gc.ca or phone 1-877-360-5500 (toll-free) / 613-992-3245 in the National Capital Region.