Guide To Using Portfolio Manager in Manitoba

V1 - March 2017

MANITOBA
GREEN
BUILDING
PROGRAM

Overview

This guide was designed to help Manitoba building owners use a free online program called Energy Star Portfolio Manager® to report and monitor buildng related energy use/cost, water use/cost and greenhouse gas emissions.

Portfolio Manager® collects data about building and utility (energy and water) use. It provides information to building owners, operators and financial officers so they can track building performance online and use reports to assess the impacts of operation, mainteance, retrofits, installation of new technology and occupant education on utility use and cost. Portfolio Manager users have access to:

- An online inventory of their organization's buildings by address, building type and gross floor area.
- The types of energy (electricity, natural gas, propane, diesel etc) used in their organization's buildings, how much of each energy type is used and what it costs.
- Water use in their organization's buildings and how much it costs.
- Information that can be used to assess their organization's building performance year-to-year.
- Their organization's building related greenhouse gas emissions.
- Weather normalized metrics, degree days and other metrics that help building operators monitor and compare the performance of their organization's buildngs to each other and optionally compare their organization's buildings to other organization's buildings and the National Median based on the Commercial Bulding Energy Consumption Survey (CBECS).

To participate in Portfolio Manager organizations will enter their building information into the free program. Once the account is set up, utility bill information has to be entered on a regular basis. In Manitoba organizations can participate in Manitoba Hydro's utility bill auto upload program. If you participate in the program Manitoba Hydro will automatically upload building electricity and natural gas records (aproximately 10 years of historical data and all current and future data) into the organization's Portfolio Manager account. Participating in the auto upload does not interfer with regular invoicing processes. The Manitoba Hydro bill will continue to be sent to your organization for payment. Information on how to participate in the Manitoba Hydro upload is outlined in this guide. Other utility information (water, propane, diesel etc) has to be entered from the utility bills. Refer to section 2 for instructions on how to enter data from a utility bill.

ENERGY STAR® Portfolio Manager® is a free online service created by the U.S. Environmental Protection Agency (EPA) to track energy consumption of facilities and compare them to similar buildings (a process called benchmarking). In 2012, Natural Resources (NRCan) adopted the service as a standard for benchmarking building energy consumption in Canada. MB Hydro Web Services makes it easier to use this tool by uploading electricity and Natural Gas meter data automatically to Portfolio Manager subscribers.

DISCLAIMER

- ENERGY STAR® Portfolio Manager® is suited for monitoring, reporting and benchmarking the annual energy/water consumption, cost and Green House Gas (GHG) emissions of buildings and should not be considered a sophisticated energy management tool.
- Energy use data is pro-rated for each calendar month for each building. This means, the total use on the bill is automatically divided by the total number of days in a billing period. The average daily quantity is then multiplied by the number of days in the calendar month to determine monthly energy consumption/use. For this reason the amount of energy used on the utility bill might not agree with the reported monthly energy use from Portfolio Manager.
- Although MB Hydro Web Services facilitates the automatic upload of electricity and natural gas bills, this data must be checked regularly for common issues such as duplicate uploads.
- Portfolio Manager does not separate electricity demand (KVA) charges.
- If you are participating in the Manitoba Hydro auto-uploads
    - the cost of electricity and natural gas reported to Portfolio Manager excludes taxes.
    - a meter number change will not affect the auto-upload function unless the meter’s physcial location is changed (Service Point Change).
- Every reference to Portfolio Manager in this Guide is a reference to ENERGY STAR® Portfolio Manager®

This guide explains how to enter information into ENERGY STAR® Portfolio Manager® use reports and other online features to inform building owners about utility use and the effects of retrofits, improvements and education on the costs associated with building performance.

A comprehensive **glossary** of all the terms used throughout Portfolio Manager® can be found at this link https://portfoliomanager.energystar.gov/pm/glossary

If you have a question, comment or find a discrepancy, email greenbuilding@gov.mb.ca

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SECTION 1: INTRODUCTION

1.1 Getting Started

This document shows you how to set up your Portfolio Manager account, fix data, and create reports to monitor building related energy, water, and GHG emissions

Your organization should appoint a Portfolio Manager/administrator to manage the account. Their responsibilities will include:

1. Ensuring all an organization's buildings are in Portfolio Manager
2. Ensuring buildings are connected with MB Hydro Web Services for auto-upload
3. Deciding who to share Portfolio Manager building information with
4. Regularly checking auto-uploads of the Manitoba Hydro bills and address errors
5. Entering water, propane, diesel (or other energy) bills into Portfolio Manager
6. Preparing and distributing building energy, water, and GHG emissions reports
7. Obtaining feedback from report users.

Before you open Portfolio Manager select a username and password for your organization's account and record it here.

Your username is __________________

Your Password is __________________

Administrator is __________________

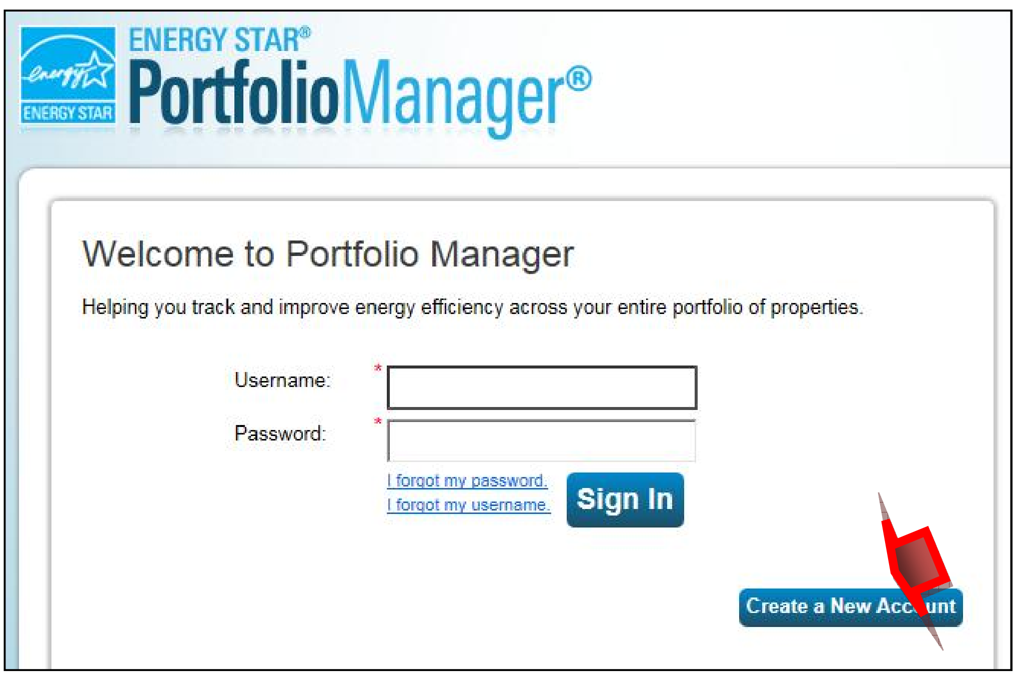
Tip – Use the name of your organization as a username

If you are comfortable using website applications use Quick Start to navigate Portfolio Manager. Quick Start is found in Section 7 in this Guide.

1.2 Navigating Portfolio Manager

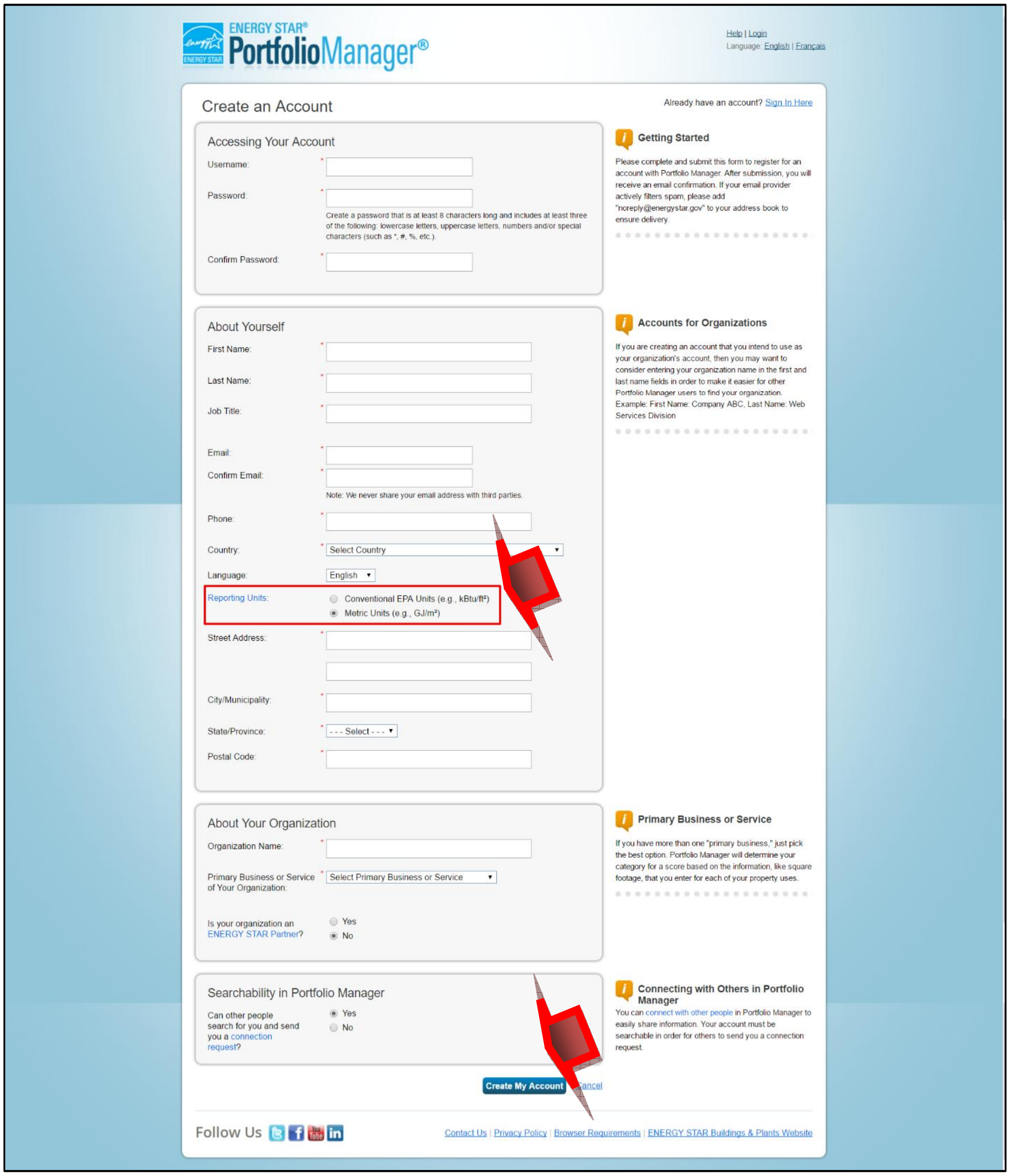
1. Go to http://www.nrcan.gc.ca/energy/efficiency/buildings/energy-benchmarking/3693

2. click! on "Access Energy Star Portfolio Manager"
3. If you have a username and password enter it to sign in. After you sign in you will be at the Portfolio Manager homepage (see step 7 in this section). If you don't have a username and password you have to create a new account.



4. click! on "Create a New Account" and provide the requested information on the form.

5. This is the Create an Account form in Portfolio Manager.


ENERGY STAR® PortfolioManager®

Help | Login
Language: English | Français

Create an Account

Already have an account? Sign In Here

Accessing Your Account

Username: *

Password: *

Create a password that is at least 8 characters long and includes at least three of the following: lowercase letters, uppercase letters, numbers and/or special characters (such as *, #, %, etc.).

Confirm Password: *

Getting Started

Please complete and submit this form to register for an account with Portfolio Manager. After submission, you will receive an email confirmation. If your email provider actively filters spam, please add "noreply@energystar.gov" to your address book to ensure delivery.

About Yourself

First Name: *

Last Name: *

Job Title: *

Email: *

Confirm Email: *

Note: We never share your email address with third parties.

Phone: *

Country: * Select Country

Language: English

Reporting Units: Conventional EPA Units (e.g., kBtu/ft²) / Metric Units (e.g., GJ/m²)

Street Address: *

City/Municipality: *

State/Province: * --- Select ---

Postal Code: *

Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: Web Services Division

About Your Organization

Organization Name: *

Primary Business or Service of Your Organization: * Select Primary Business or Service

Is your organization an ENERGY STAR Partner? Yes / No

Primary Business or Service

If you have more than one "primary business," just pick the best option. Portfolio Manager will determine your category for a score based on the information, like square footage, that you enter for each of your property uses.

Searchability in Portfolio Manager

Can other people search for you and send you a connection request? Yes / No

Connecting with Others in Portfolio Manager

You can connect with other people in Portfolio Manager to easily share information. Your account must be searchable in order for others to send you a connection request.

Create My Account Cancel

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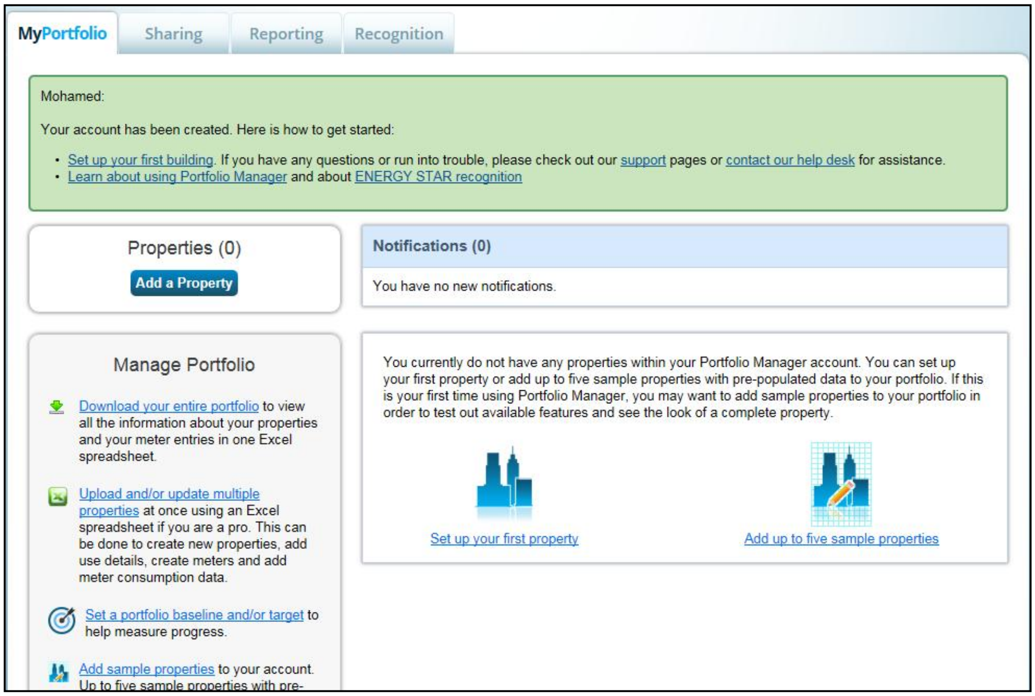
6. Fill out the information. Required fields are marked with an *.

   Tip: Make your username recognizable, it is best to use an abbreviation or your organization's full name.

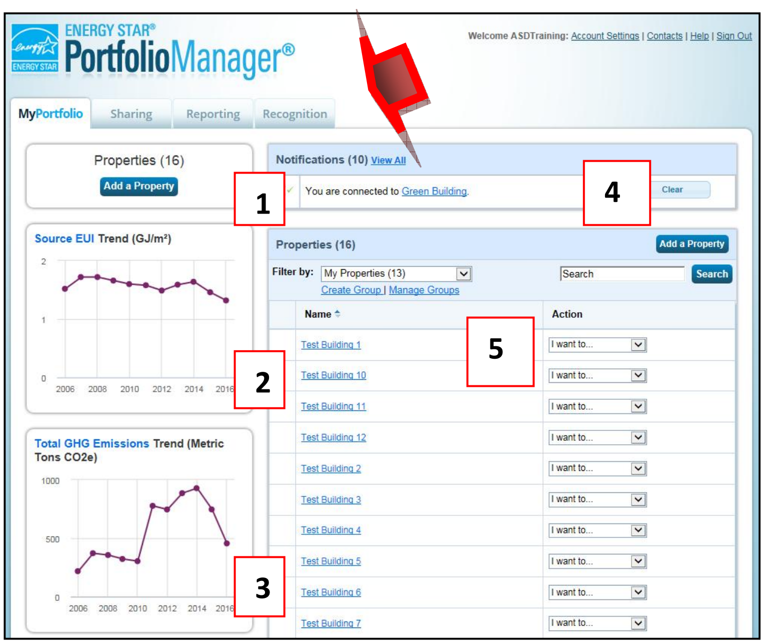
   Tip: In the *Reporting Units* box, select Metric Reporting Units (GJ/m^2).

7. When you have finished **click!** on "Create my account" at the bottom of the page.

8. The Portfolio Manager homepage will look like this if no properties have been entered.



9. The Portfolio Manager homepage looks like this if properties have been entered.



Notice the four tabs at the top of the Portfolio Manager homepage:

- My Portfolio
- Sharing
- Reporting
- Recognition

The page tabs allow you to manage the information in your account. The other boxes on your homepage contain property related information.

The content of the boxes marked 1-5 are described below.

Box 1: Indicates how many properties are entered in your account. You can find out more information about the property by clicking on the property listed in Box 5.

Box 2: Source Energy Use Intensity (EUI) Trend (GJ/m^2 for all properties)

NOTE: Source EUI includes transmission losses (Not to be confused with Site EUI which is the energy consumption from your Hydro bills divided by the gross floor area).

Box 3: Total GHG Emissions Trend (the GHG emissions for all properties combined)

Box 4: Notifications (messages that you receive from MB Hydro or other Portfolio Manager users)

Box 5: The list of all the buildings entered into your portfolio. You may click on any building to get its detailed information, energy, water consumption and GHG emissions. You may also filter your buildings by group names, and create new groups based on any criteria (e.g. type, owners, location...etc.).

SECTION 2: CREATING AN ACCOUNT

2.1 Add a Property

This section provides guidance on how to add your properties and related information in order to track energy and water use/consumption, costs, and GHG emissions using the Portfolio Manager program.

You need:

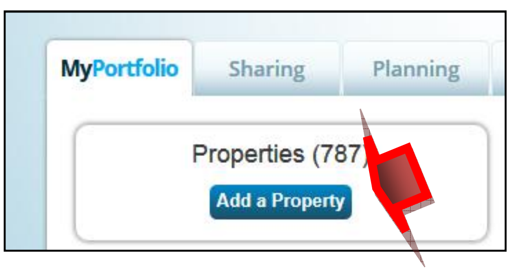
1. Building name
2. Full address
3. Gross Floor area in m2
4. Construction date (If you can't find the construction date enter 1800, it will make it obvious that the information was not available – if you find the construction date you can enter it later.)

You can add one property at a time, or multiple properties at once using a spreadsheet. The following section explains how to add one property. For multiple properties, **skip to section 2.1.2.**

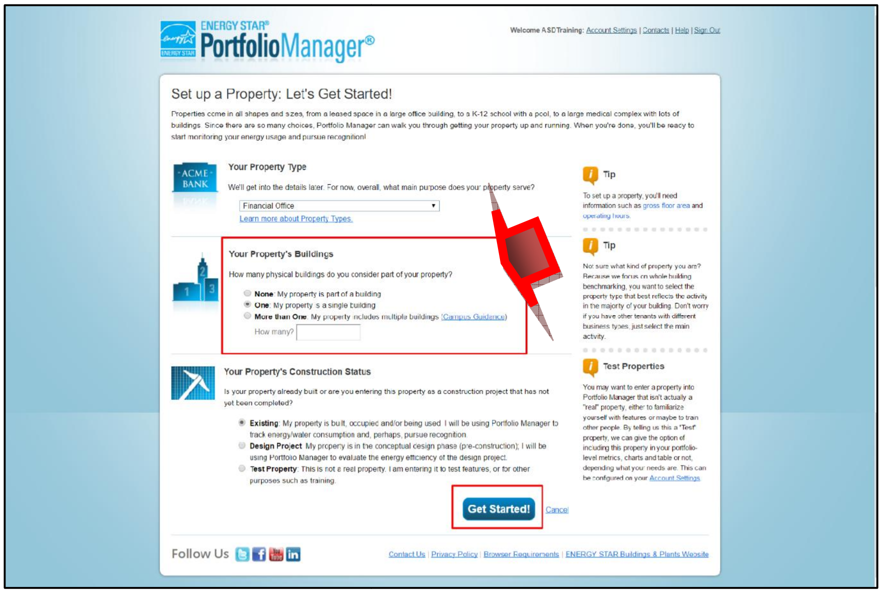
2.1.1 Adding one property at a time

On the "My Portfolio" homepage

1. click! "Add a Property"

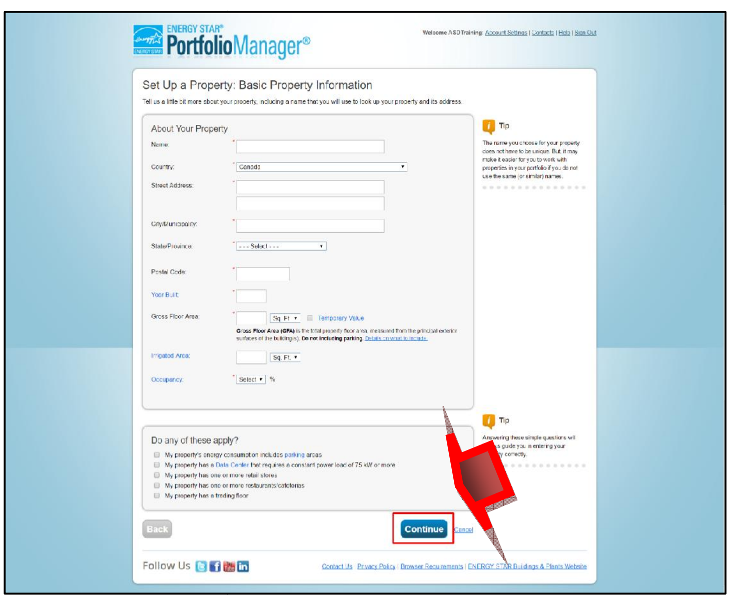


2. Select your property type, the number of buildings and your property's construction status.



Note: A building can have more than one meter for each energy or water source. If several buildings share one meter for water, electricity, natural gas or other fuels enter the buildings as a campus. If you have a campus situation refer to "campus guidance".

3. Enter basic property information, then **click!** on "Continue"
    a. Make sure you add the correct postal code - Portfolio Manager uses weather data from the closest weather station based on the postal code you entered
    b. *If you do not know the year built, enter 1800*
    c. *If you do not know the Gross Floor Area (GFA), enter 1 m^2 for the interim. The resulting Energy Use Intensity calculation will indicate the actual GFA has not been entered. When you obtain the GFA add it to the building information.*
    d. *Information can be updated later by editing the properties of a building.*



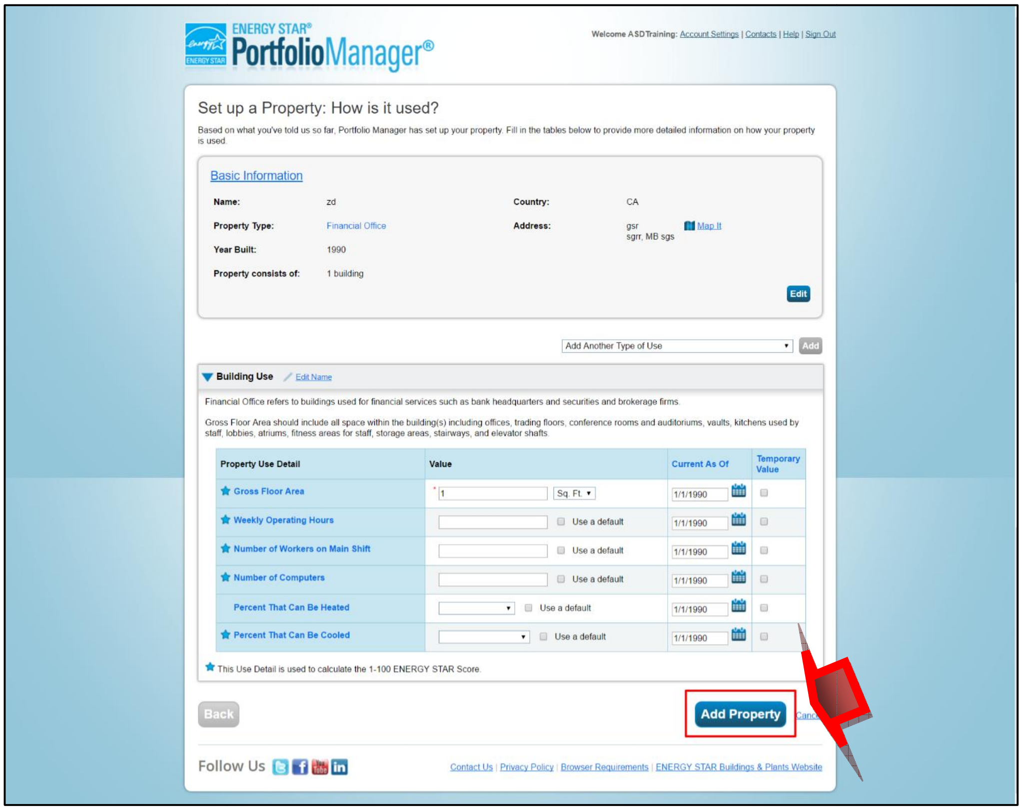
Note:

click! on the information highlighted in blue for further explanation

* means that this information must be added to proceed.

4. Enter property use details, then **click!** on "Add Property"

a. Energy Star Scores are available for the following building types in Canada. (Office, K12 School, Medical office, financial office, Residential care facility, senior care community, Supermarket / Grocery store). If you require an Energy Star Score enter the actual values. If you don't require an Energy Star Score use default values for operating hours, number of workers or other details and if you choose you can update the default values later.



NOTE: If you want a definition for any term – place your mouse over the word.

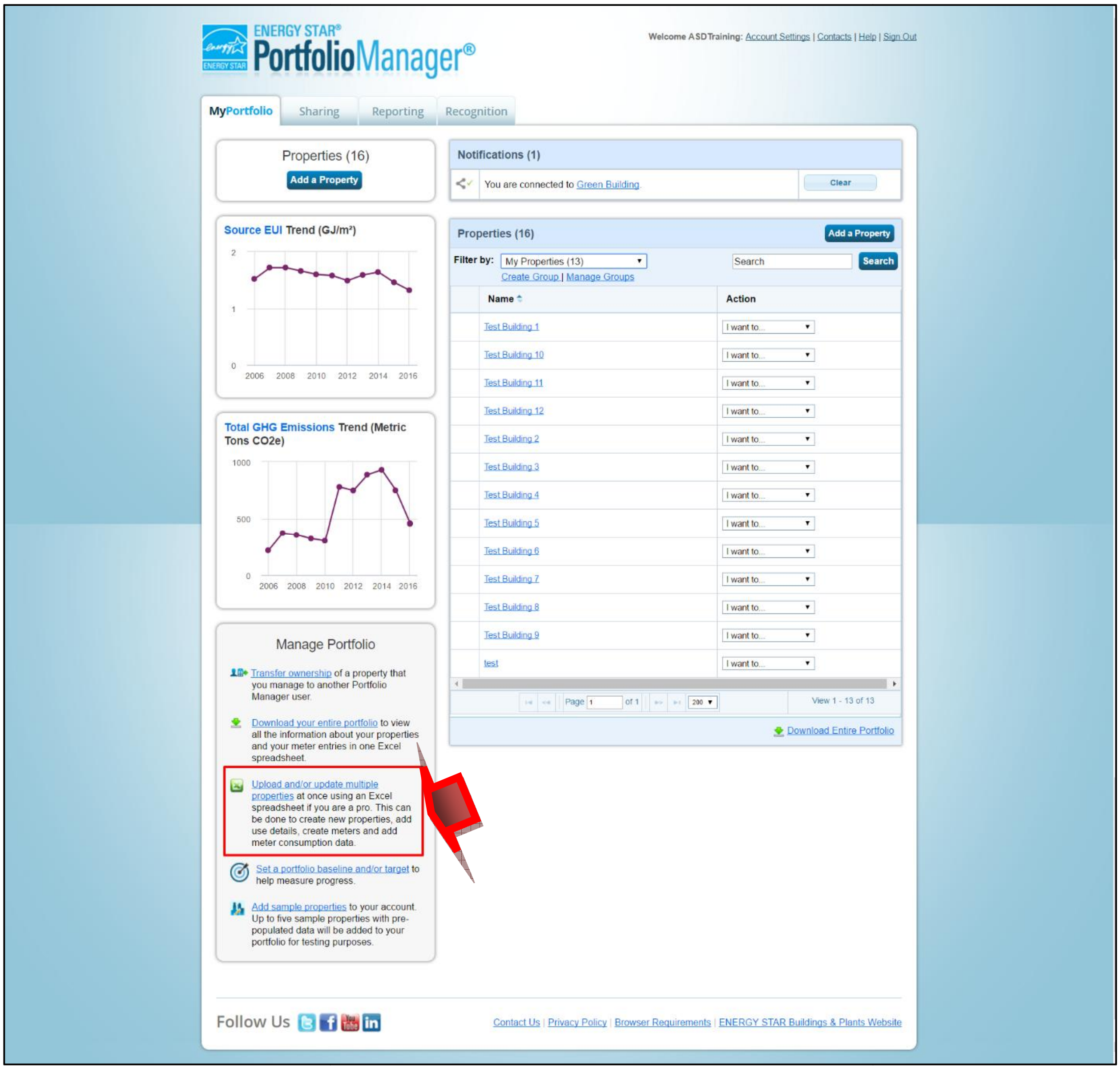
5. When you have successfully added your property, it will be added to your homepage.
6. Repeat the above steps to add each property, unless you want to add multiple properties at one time. If you want to add more than one property to your account at one time, use a spreadsheet. For information on how to use a spreadsheet to upload information about multiple buildings go to **section 2.1.2**

2.1.2 Add multiple properties with spreadsheet uploads

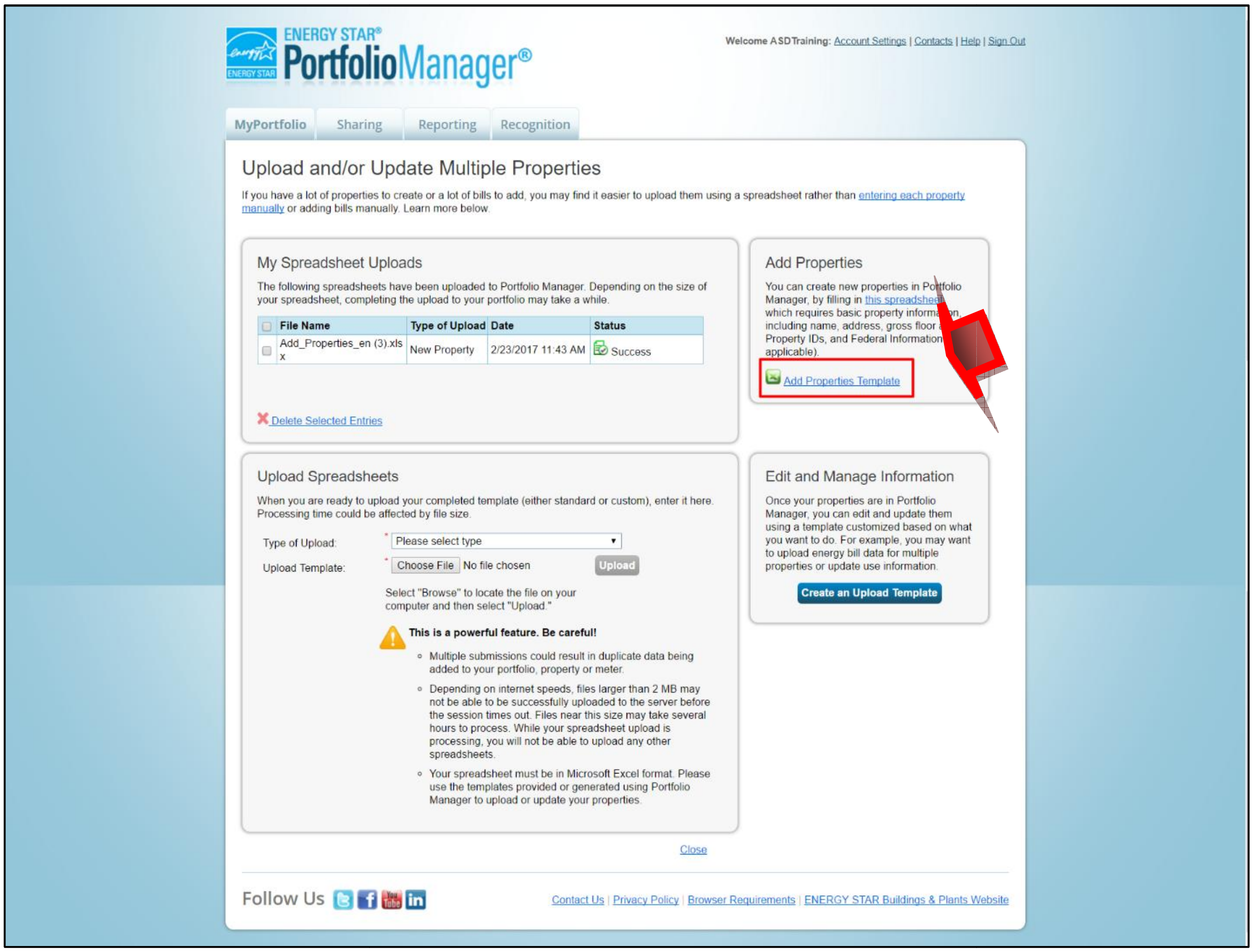
If you have multiple properties, you can use a spreadsheet to upload the information into Portfolio Manager.

On the "My Portfolio" homepage

1. **click!** on "Upload and/or update multiple properties"

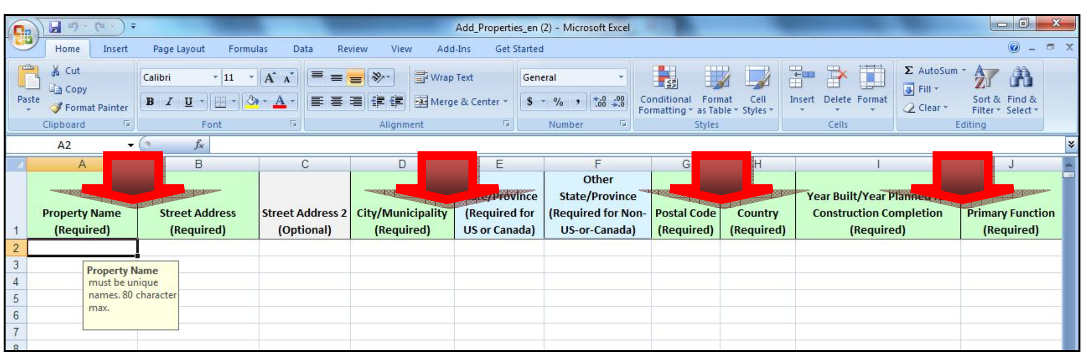


2. **click!** on "Add Properties Template"



3. An excel spreadsheet template will be created, which can be downloaded
4. Choose the second tab of the template called "Properties", complete the properties information

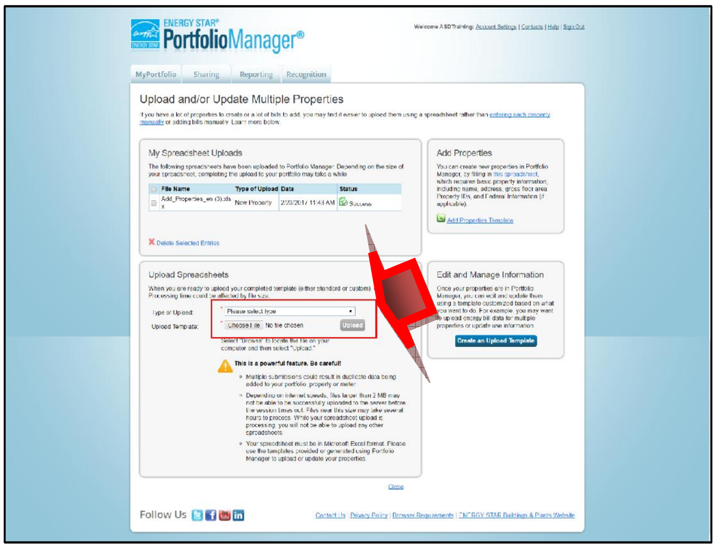
5. Add required information to the spreadsheet.



Tips:

- *If you do not know the year built enter 1800*
- *If you do not know the Gross Floor Area (GFA), enter 1 m^2 but update the GFA later. If you enter 1 m^2, it will be obvious when you run reports and it will remind you to enter actual GFA later.*

6. Once you have completed the template, save it to your computer
7. Go back to the Portfolio Manager homepage and click "Upload or Update properties" (refer to step 1), select the type of upload "Add new properties" using the drop down box.
8. **click!** on "choose file" and locate the template file/spreadsheet you saved to your computer.
   click! on "Upload".



2.2 Add Meter(s)

Add meters to properties/buildings in order to collect the energy or water consumption at the building.

You need:

1. The utility bill for water, electricity, natural gas, propane etc. for each building (or campus if applicable).
2. The units for reporting consumption/use (electricity use KWh, natural gas use cubic metres , water cubic metres, propane use in litres etc..)

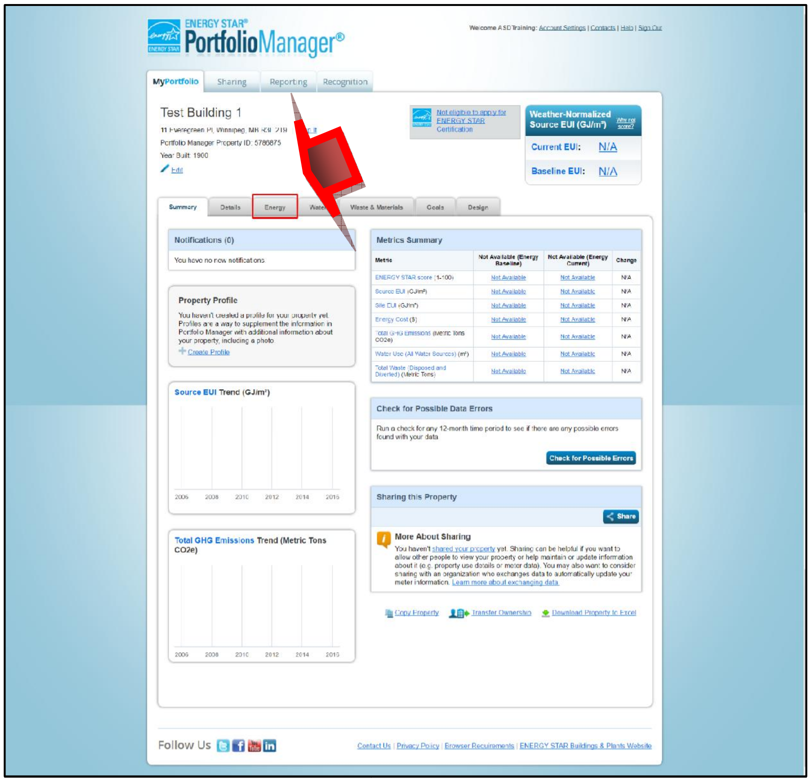
Select the energy tab if you are adding a meter or meters for electricity, natural gas or propane.

Select the water tab if you are adding a water meter(s)

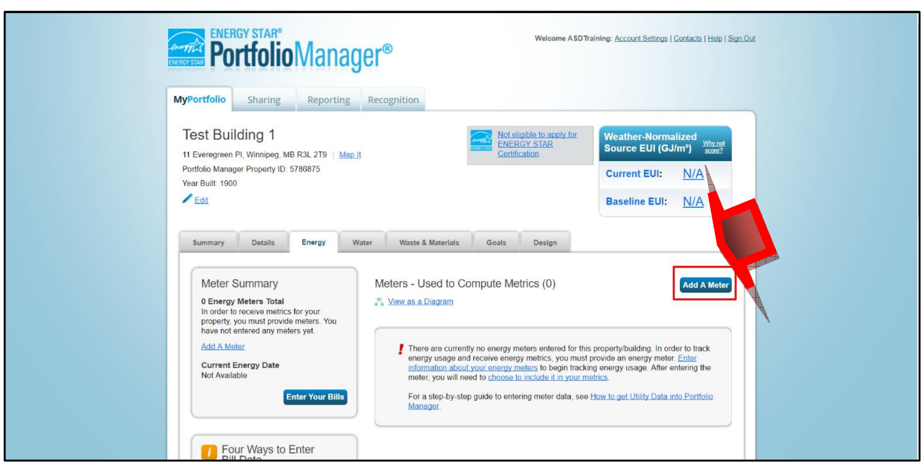
You can add meters to one property at a time, or use spreadsheets to enter multiple meters to multiple properties. The following section explains how to add meters to one property. For adding multiple meters to multiple properties, **skip to section 2.2.2.**

2.2.1 Add a meter to a property

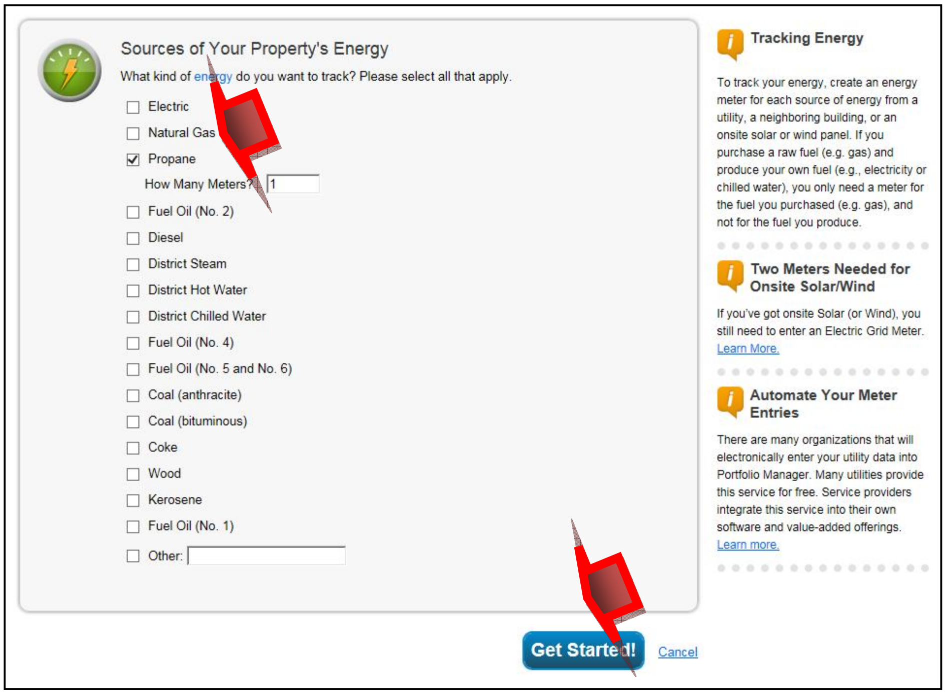
1. click! on any property on your homepage, you will be taken to the Property Summary page below
2. click! on the “Energy” or “Water” tab



3. click! on “Add A Meter”



4. When entering energy meters select the fuel type (i.e. electricity, natural gas, propane...etc.)
5. click! on "Get Started"

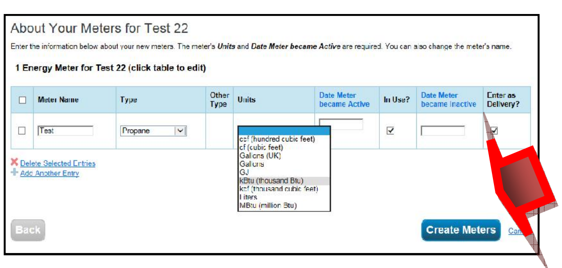


6. Complete the fields such as the Units or Date became Active (If you don't know the date the meter became active set the date to 01/01/1990 since Manitoba Hydro does not upload information prior to 1990)

7. For electricity and natural gas meters, change the default name of the meter to the actual meter # on the Manitoba Hydro bill(s) to avoid confusion when the meter numbers are shared with MB Hydro Web Services to activate the auto-upload of electricity and natural gas records.

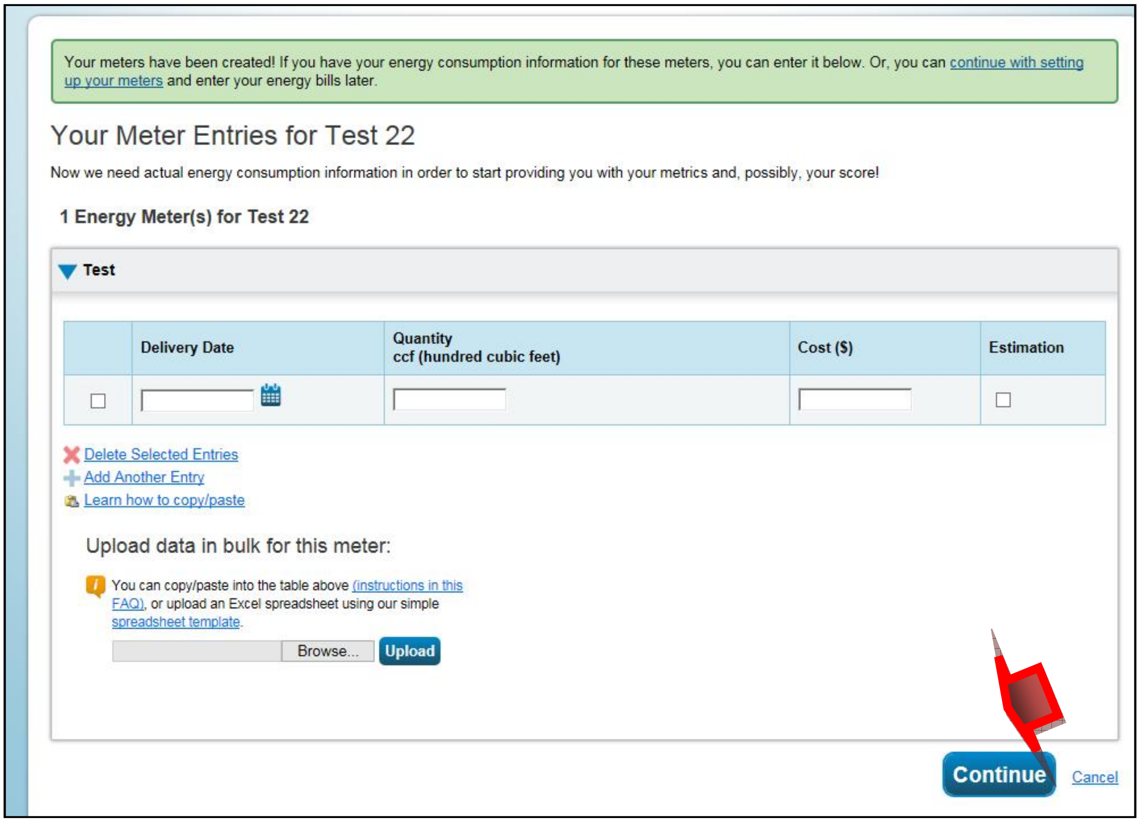
8. If you are adding a propane or water meter, it is recommended that you change the default name of the meter to the actual account # from the bill (for that building) to avoid confusion.

9. click! on "Create Meters"



10. Start entering consumption data

11. click! on "Continue"



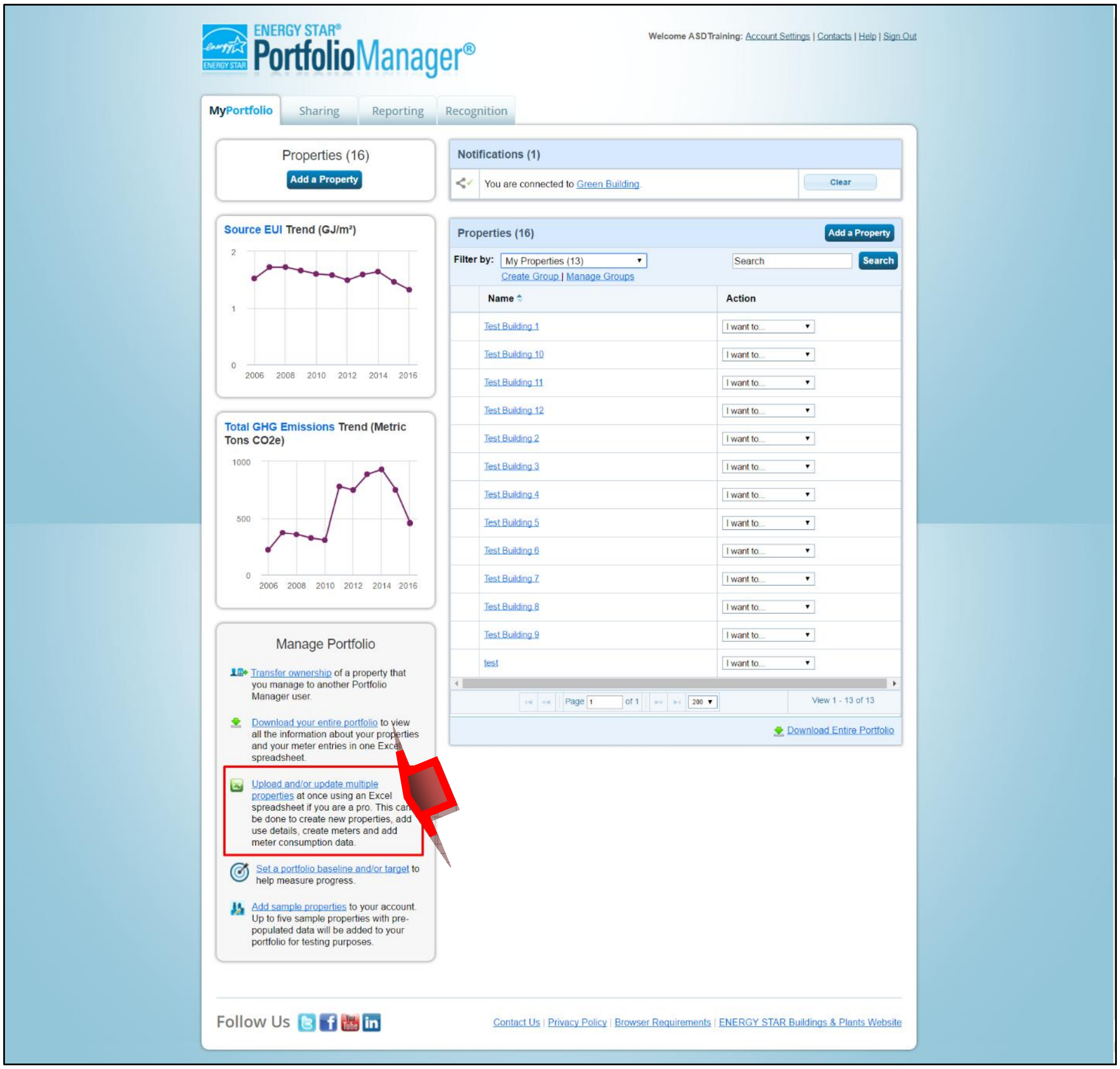
Note:

- If you are connected to MB Hydro Web Services, you will be prompted to share this meter for auto-upload by entering your MB Hydro account number (the account number is on the Manitoba Hydro Bill).

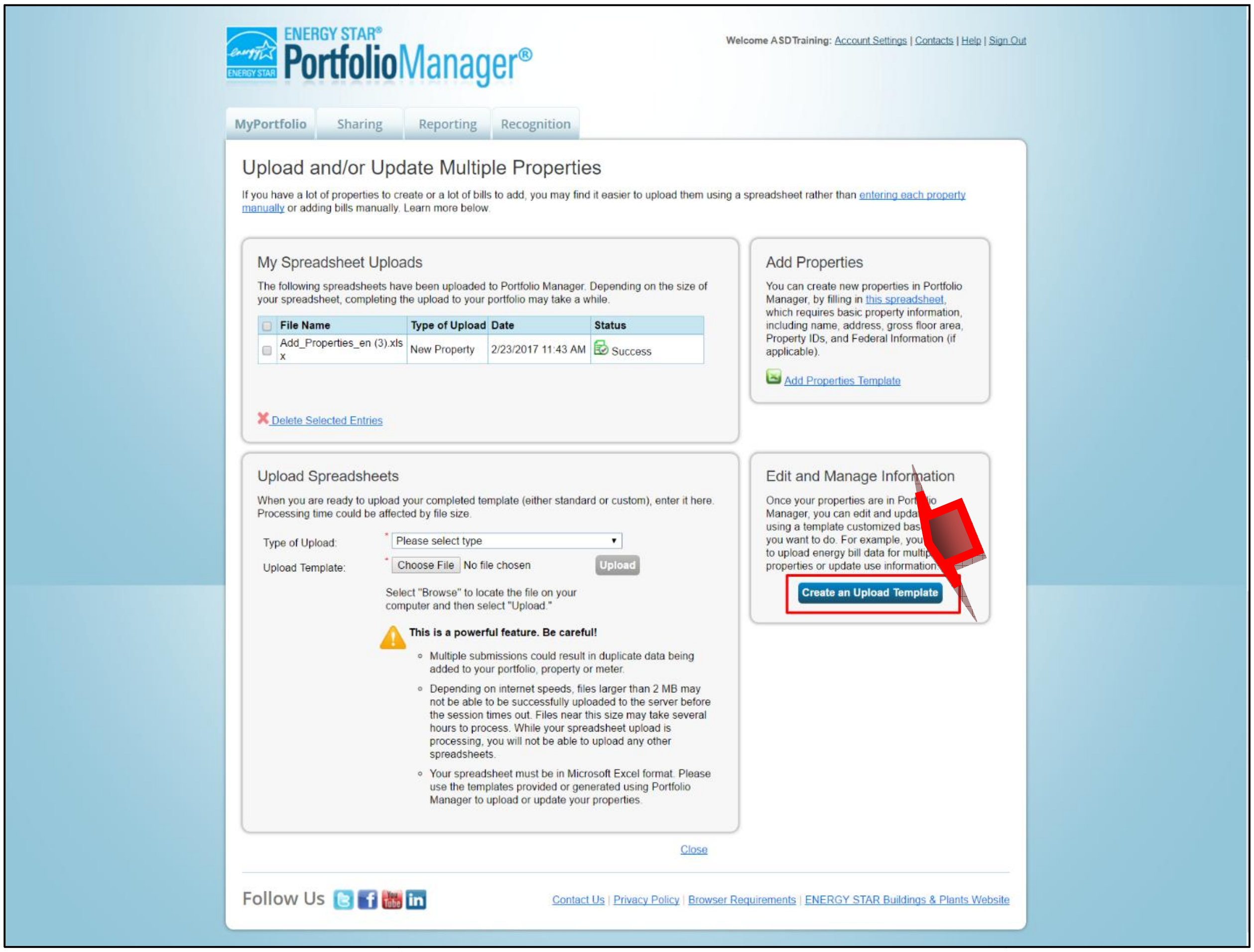
- If Manitoba Hydro replaces a meter the new meter number will be updated in Portfolio Manager and the upload automatically. The auto-upload function will be affected when the meter's physcial location is changed (Service Point Change). If this occurs set up the new meter in Portfolio Manager and all subsequent use and cost data will be uploaded into the Portfolio Manager account. Note you will be required to share the new meter number with Manitoba Hydro to activate the upload.

2.2.2 Add meter(s) to multiple properties using spreadsheet uploads

1. **click!** on "Upload and/or update multiple properties" on the "My Portfolio" homepage



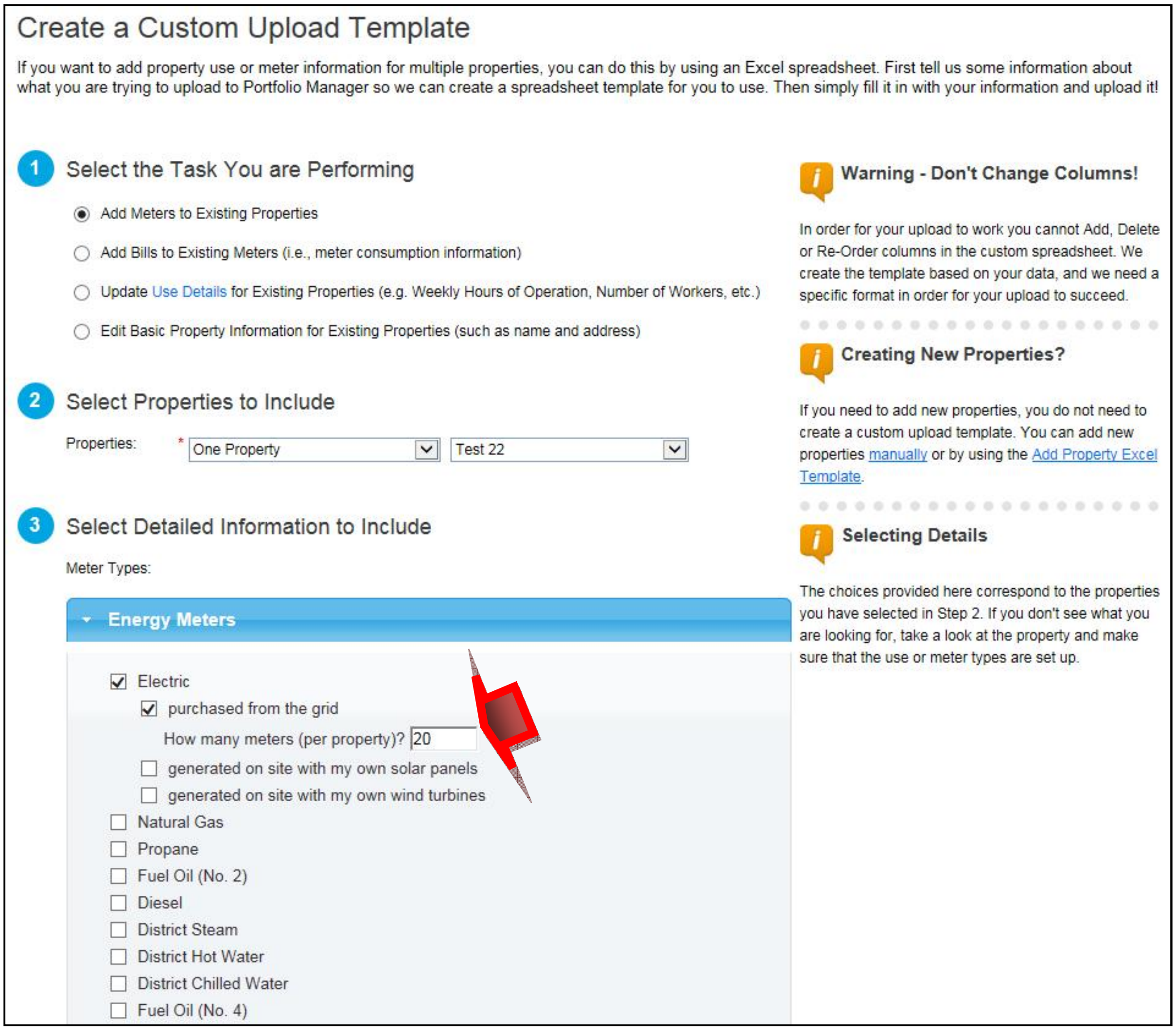
2. **click!** on “Create an Upload Template”



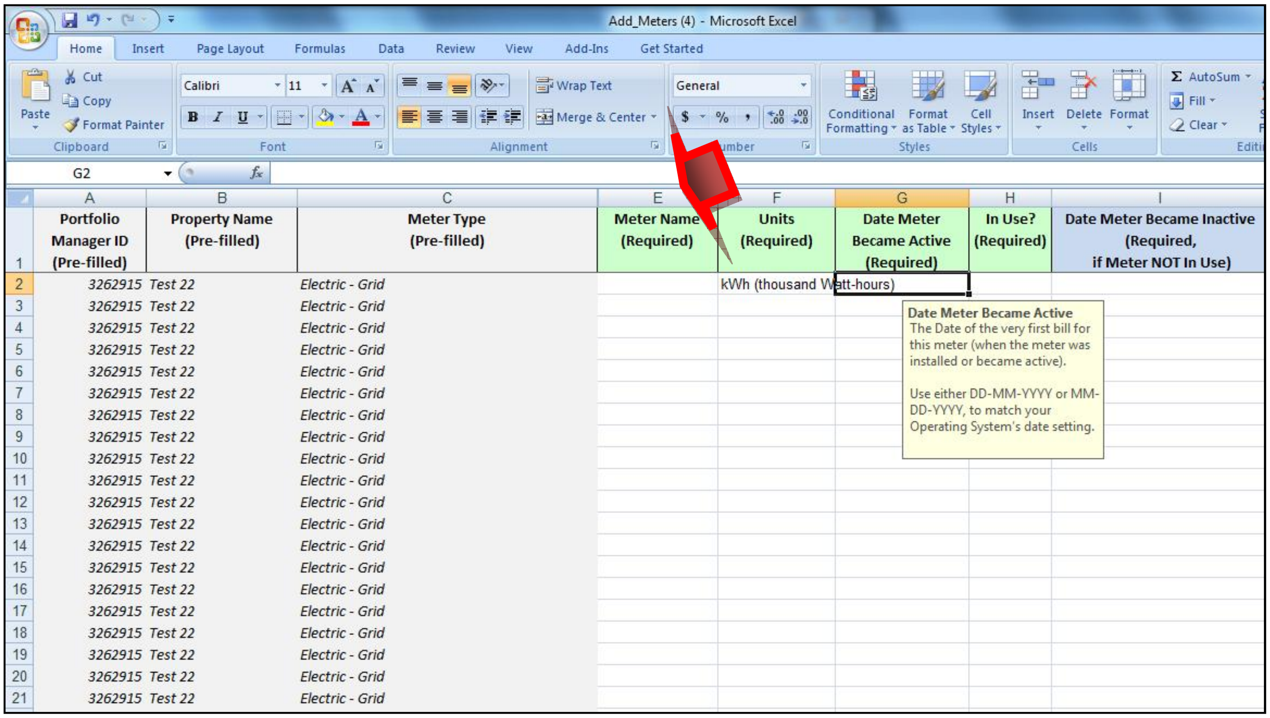
3. Select “Add Meters to Existing Buildings”
4. Choose the property(ies) you want to add meters for
5. Choose the type of meters you want to add (Water, Electric or Natural Gas or Others)
6. Choose the number of meters you want to add per building
7. **click!** on “Create and Download Template”:

Tips

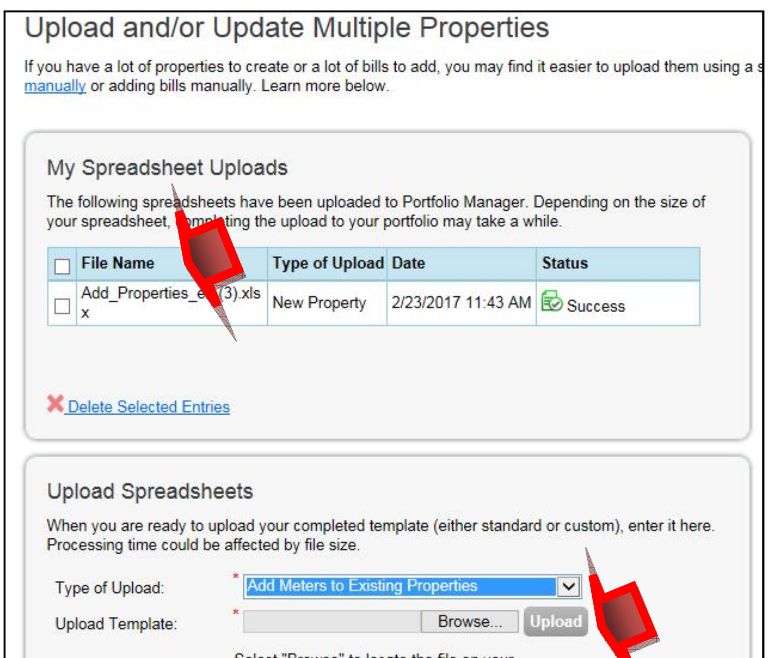
- If some of your buildings have more than one meter, count the highest number of meters associated with a single property and enter the number into the number of meters field to create the template. When you download the template, unnecessary rows for any buildings that have fewer meters than the maximum can be deleted. Once the template is generated you cannot add rows, you can only delete rows.
- Create templates for each meter type (i.e. Water, Electric, Natural Gas...etc.)



8. The template will generate an excel spreadsheet
9. Change the meter name to the meter # that is on your MB Hydro bill.



10. Once completed, save the excel sheet to your computer
11. Go back to the “Create an Upload Template”
12. Choose the type of upload you are doing, such as “Add meters to existing buildings”.
13. **click!** on “browse” to locate the file on your computer
14. **click!** on “Upload” as shown below and the information will be loaded onto Portfolio Manager.



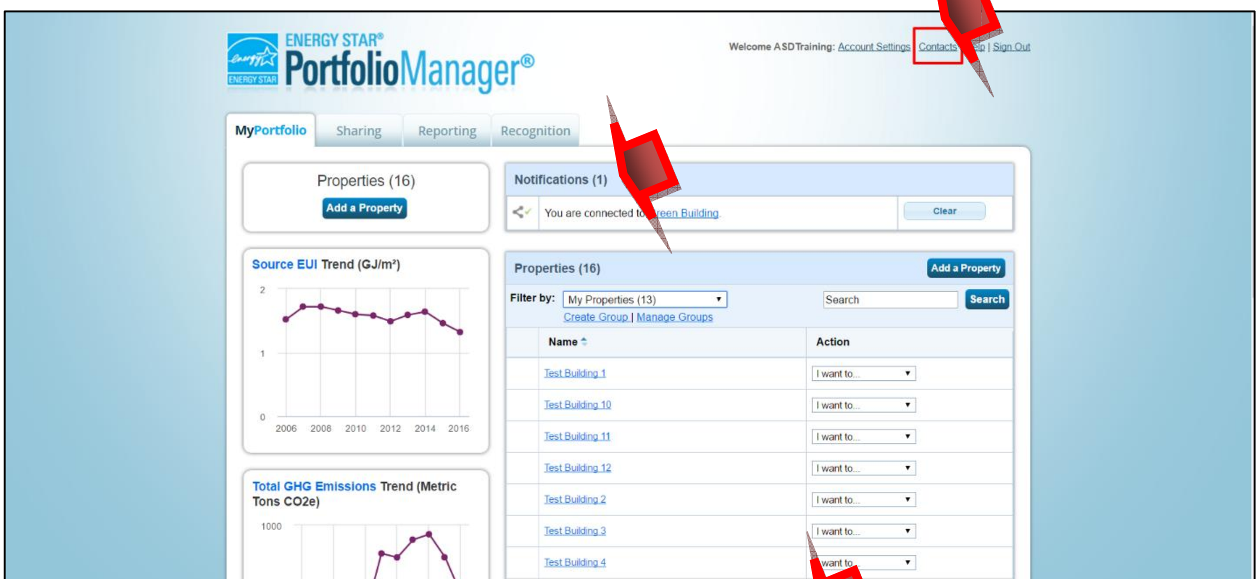
2.3 Connect to Manitoba Hydro

You need to connect to MB Hydro to participate in the auto upload program in Manitoba. Once Manitoba Hydro is notified that you want to participate they will complete the steps to upload monthly electricity and natural gas bill into your Portfolio Manager account.

You need:

Your MB Hydro bill(s) to obtain the account numbers and meter numbers associated with each building.

1. click! on “Contacts” on the “My Portfolio” homepage



2. Type “manitobahydroWS” into the search box: 

3. 

with Manitoba Hydro Web Services

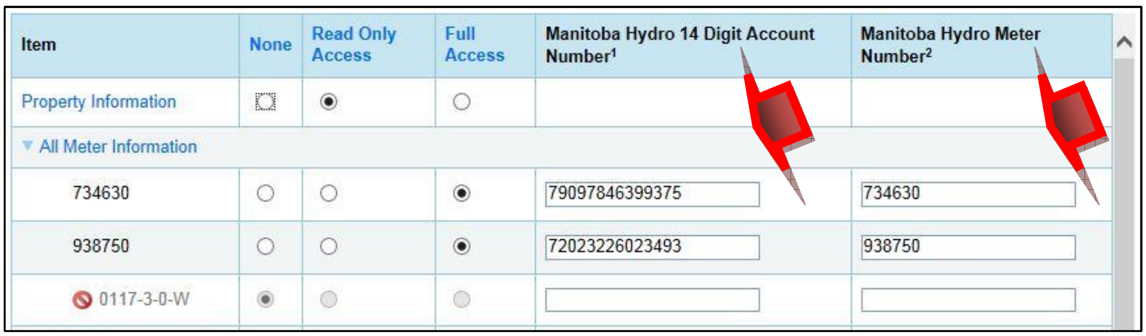
Note: It takes a day or two for the “connection” to be accepted by Manitoba Hydro. When Manitoba Hydro completes the connection they will send a notification to your Portfolio Manager homepage.

Once Manitoba Hydro accepts your connection request, complete the following steps to activate the Auto Upload service.

Sharing Properties with Manitoba Hydro

1. **click!** on the “Sharing” tab beside “My Portfolio” on the Portfolio Manager homepage.

2. **click!** on “Share (or Edit Access to) a Property”
3. Select the property or properties you want to share with Manitoba Hydro
4. Select Manitoba Hydro Web Services from the list of people/accounts you are connected to
5. Give permission for Personalized Sharing & Exchange Data and click continue
6. **click!** on the “Exchange Data” and a window (like below) will pop up



Item	None	Read Only Access	Full Access	Manitoba Hydro 14 Digit Account Number[1]	Manitoba Hydro Meter Number[2]
Property Information	☐	◉	○		
All Meter Information					
734630	○	○	◉	79097846399375	734630
938750	○	○	◉	72023226023493	938750
0117-3-0-W	◉	○	○		

7. Enter the meter number(s) and account number(s) and submit share

If the meter share is declined

- Portfolio Manager will notify you if the meter share request is declined. If the meter # or account # didn’t match with Manitoba Hydro’s records you will receive a message. The error can be resolved by checking
  - That you entered the correct meter and account numbers for each building
  - That when you shared the properties with MB Hydro Web Services, you typed the correct numbers
- If you find the error, re-share with the correct meter and account numbers
- If you are unable to determine why the share is not working contact Manitoba Hydro

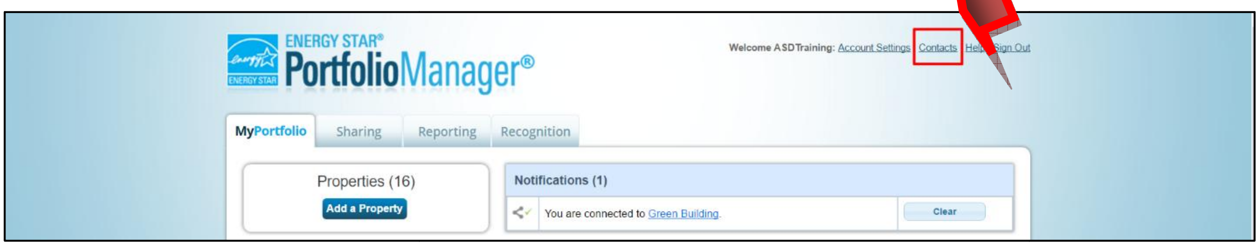
Contact: Courtney Kuelza (MB Hydro) |phone: 204.360.4941 | email: ckuleza@hydro.mb.ca

2.4 Share Properties with Other Portfolio Manager Users

- Voluntary: Share with GBCT if you want to GBCT to access information about your buildings.
- Recommended: Share information with others in your organization (such as your facility managers, property managers, financial officers etc) so they can access the building information and utility use in the organization's Portfolio Manager account.
- Optional: Share with contacts in other organizations to compare your organization's buildings to another organization's buildings.

Sharing your properties lets you provide information to colleagues that can help manage, interpret or improve the performance of a building.

In order to share a property with others, you must be connected to them in Portfolio Manager (i.e. the person has to be on your contacts list). To send a connection request go to the contacts page:



2.4.1 Connect to other Portfolio Manager Users

1. click! ``Contacts " on the Portfolio Manager homepage to see a directory of your current contacts, including contacts you are connected to.
2. click! Add contact
3. Find a Portfolio Manager user by searching for their name, Portfolio Manager username, or email address.
4. When you find the person you want to connect with on the Search Results page, click! connect to send them a connection request. When a connection request is sent, the other person will get a "Notification" on their Portfolio Manager account. They can accept the request directly from the notification. Once they accept your request, you will receive a confirmation. You are now connected and you will be able to share properties with the contact.

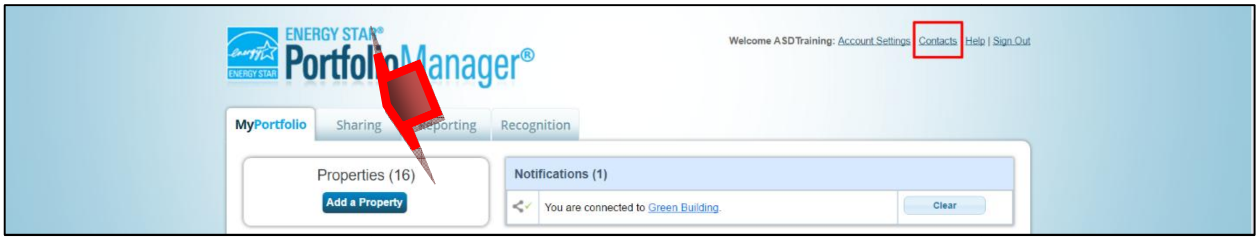
2.4.2 Share properties with Portfolio Manager Contacts (other Portfolio Manager Users)

Once you are connected to a contact in Portfolio Manager you can share properties and specify the level of permission they have to view and or edit your properties. You can share properties that you have created (as the organization's account coordinator/administrator), or SHARE FORWARD properties that have been shared with you by your contacts. You can only share a property that has been shared with you if the person who shared it has assigned you that permission. (Note: The property data administrator or coordinator are the only persons that can delete or transfer ownership of an organization's property.) There are four permission types:

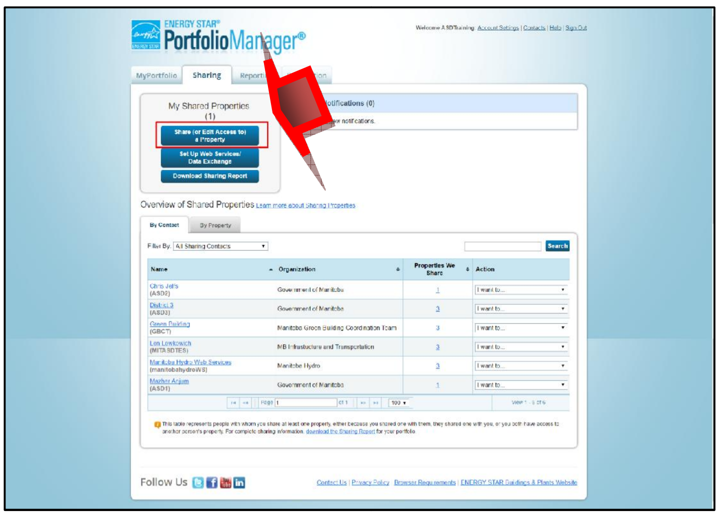
- *Read only* access which allows other to view your property data.
- *Full access* which allows others to view and edit your property data, and also re-share it with others.

- *Custom access* which allows you to designate ready-only or full access levels for distinct property data (e.g. property information, meter information, goals).
- Exchange Data access which allows you to share your property with an organization that exchanges data with Portfolio Manager through web services (i.e. Manitoba Hydro web services).

1. click! on “Sharing”.



2. click! on Share or Edit Access



3. Select the properties you want to share from the drop down menu. You can select a single property, multiple properties, or all properties in your account. You can also use the filters if you wish.
4. Select contacts to share the property(ies) with by clicking on their names. You can select multiple contacts or accounts by holding down CTRL as you make each selection. If you cannot see a contact on the list check to see if they are listed on your “Contacts” page and that they have accepted your connection request.
5. If you are sharing properties with multiple users, you can choose to share with the same permission level or with different permission levels.
   a. If you want all the users to have the same permission level, choose the access level and click! Share properties to send the sharing request.
   b. If you want to assign different levels of access, select the “ I need to give different permissions” radio button, and then click! continue.
      - Select the permissions for each property and contact.
      - Click the radio button at the top of each column, to select a permission level for the contacts.
      - If you choose NONE the property will not be shared with the specified contact. If you choose CUSTOM ACCESS, you can provide separate levels of access for property

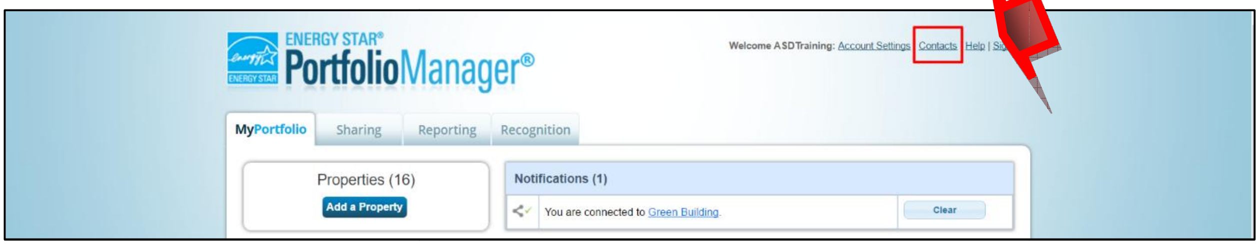
information, each individual meter, goal setting and recognition. With CUSTOM ACCESS you also have the ability to grant Share forward permission.

- click! SHARE PROPERTIES to send the sharing request.

After you share your property, you will see notifications on the Portfolio Manager homepage and the Sharing TAB confirming that the sharing request was sent. You will also receive notifications when the contact(s) accept the request.

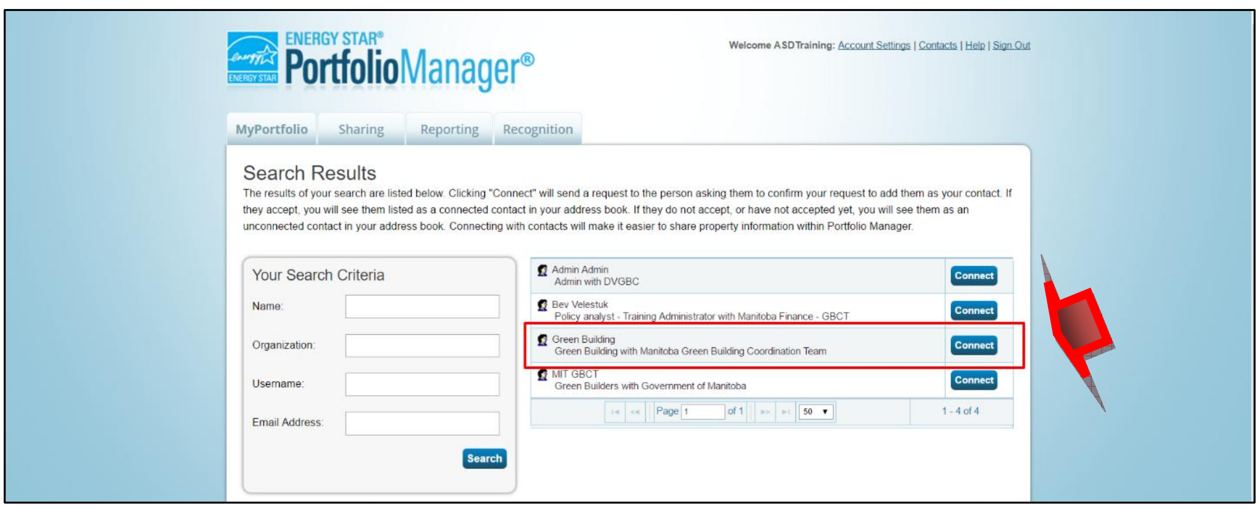
2.4.3 Share your properties with the Green Building Coordination Team (Voluntary)

The following instructions apply if your organization wants to share building information with GBCT.



1. Type “GBCT” into this search box: Search for new contacts

2. Connect with “Green Building”

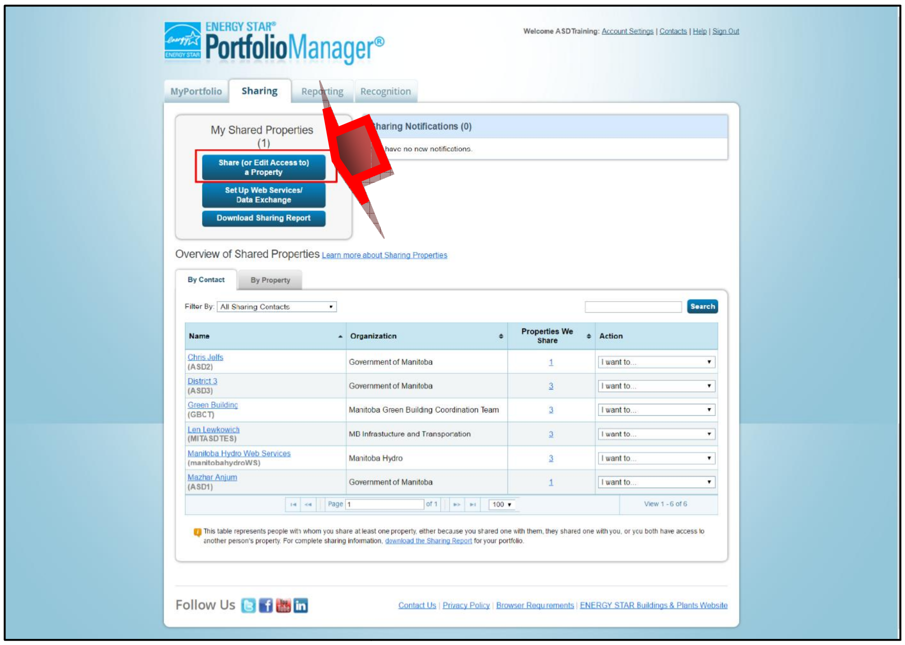


3. You will need to wait a day or two until this “connection” is accepted by GBCT which will appear as a notification on your homepage

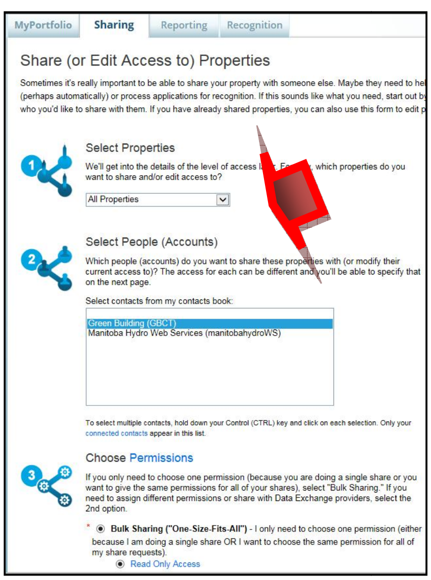
NOTE: if you add a new building(s) to your Portfolio Manager account you have to send a “new” share request to GBCT else they will not know that you’ve added a building. Portfolio Manager does not automatically share new buildings with the contacts you shared other buildings with.

When GBCT accepts your connection and you receive a notification, follow these steps to share your buildings with GBCT.

4. On your homepage, click on the sharing tab
5. **click!** on “Share (or Edit Access to) a Property”



6. Select “All Properties”



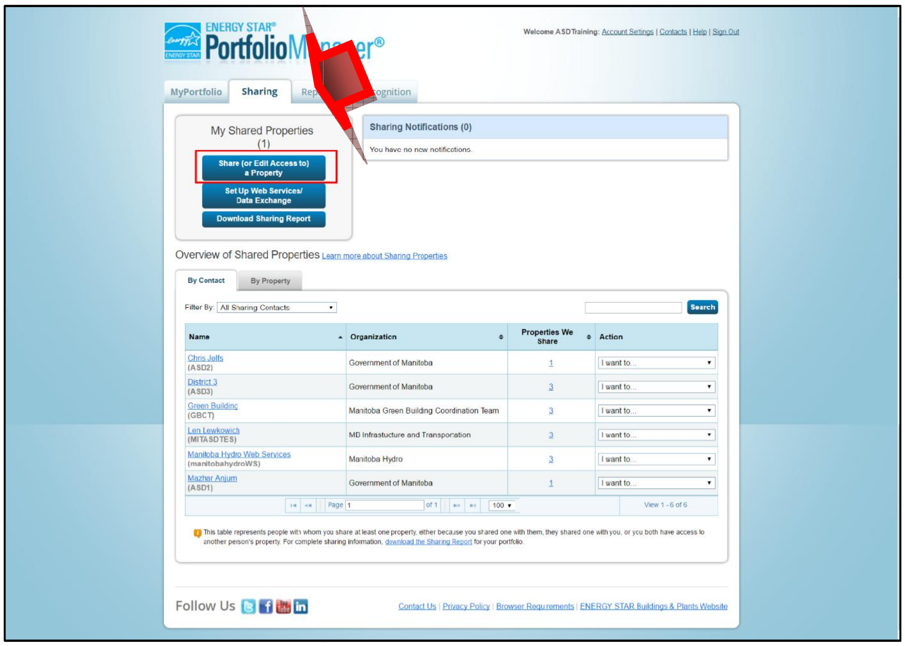
7. Select “Green Building (GBCT)”

8. Choose “Bulk Sharing”
9. Choose “Read Only Access” Note: “Read Only Access” only enables the other account owner to see your buildings’ information and energy consumption. In contrast, “Full Access” allows the other account owner to edit your building information.
10. click! on Share Property(ies)

2.4.3 Manage Shared Properties

The Portfolio Manager administrator should review the list of properties that they’ve shared with others and properties that have been shared with them on a yearly basis.

To view the details of all your shared properties and all the properties shared with you simply download the Sharing Report from the SHARING tab.



The report shows: basic property information, contact information, permission levels and SHARE FORWARD permissions.

The Portfolio Manager co-ordinator/administrator can edit permissions or add/remove access to shared properties at any time.

2.5 Enter Water, Propane and other Energy Sources

Manitoba Hydro only uploads electricity and natural gas consumption information. The data for water and other fuel sources must be added to your Portfolio Manager account manually (or by using spreadsheets).

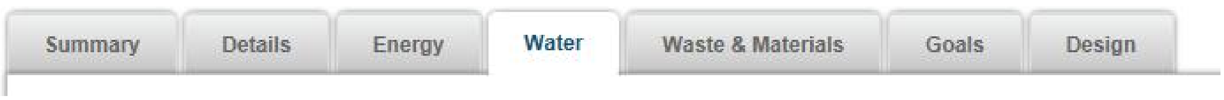
There are four ways to enter billing data: manually, use Portfolio Manager's simple spreadsheet to add information about one meter, use Portfolio Manager's complex spreadsheet (for adding information on multiple meters and multiple properties) or find an organization that will enter the information into Portfolio Manager on your behalf.

You need:

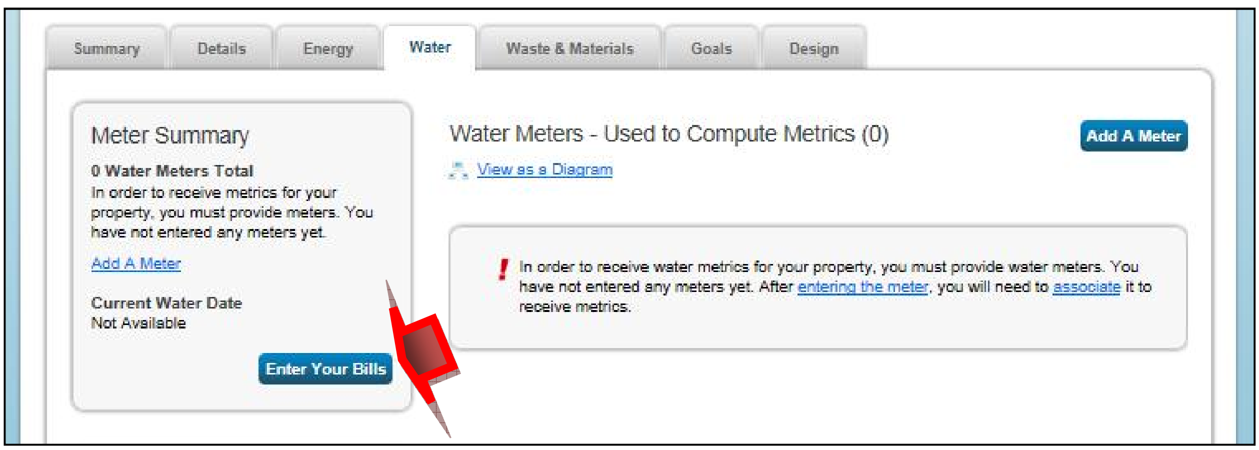
1. The utility bills for water and other fuel sources.

To input the billing information manually.

1. On the Portfolio Manager homepage click! on the property address. If you are entering water for the property click! on the water Tab. If you are entering energy information click on the energy Tab.



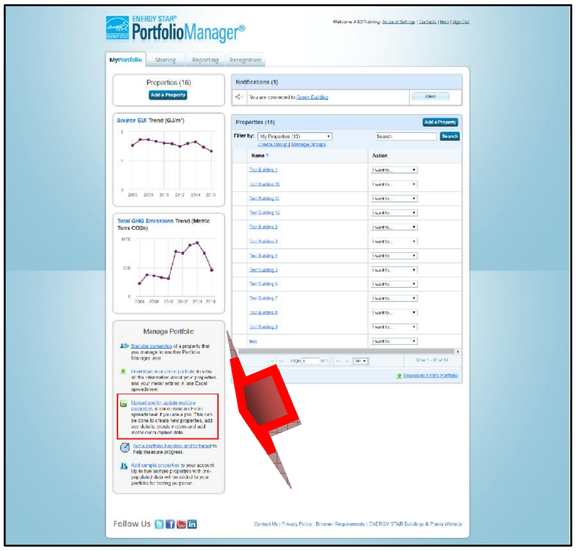
2. Add the meter, and then enter the corresponding consumption and cost for the billing period.



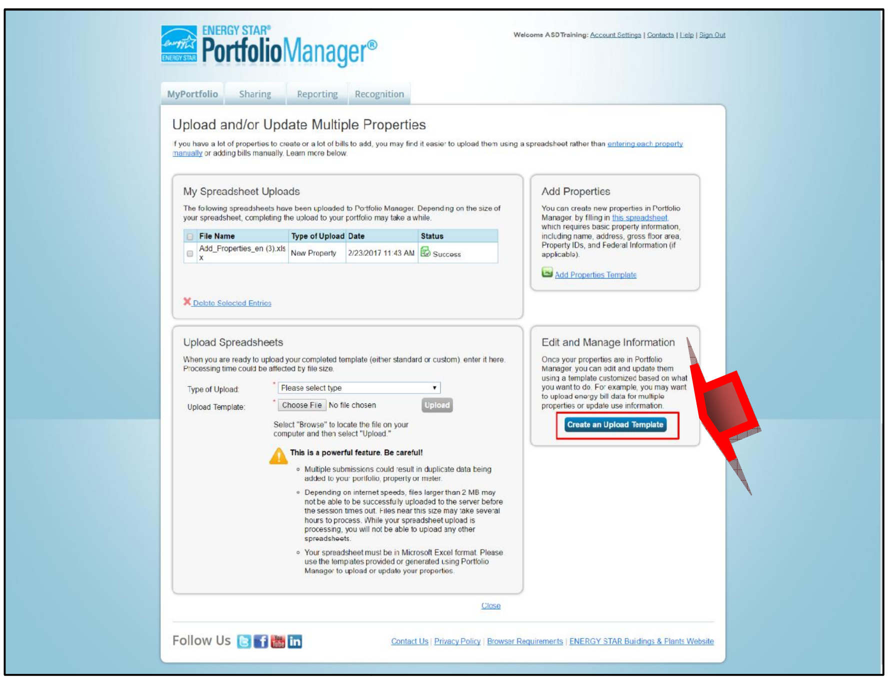
To add information using spreadsheets.

On the "My Portfolio" homepage

1. click! on "Upload and/or update multiple properties"



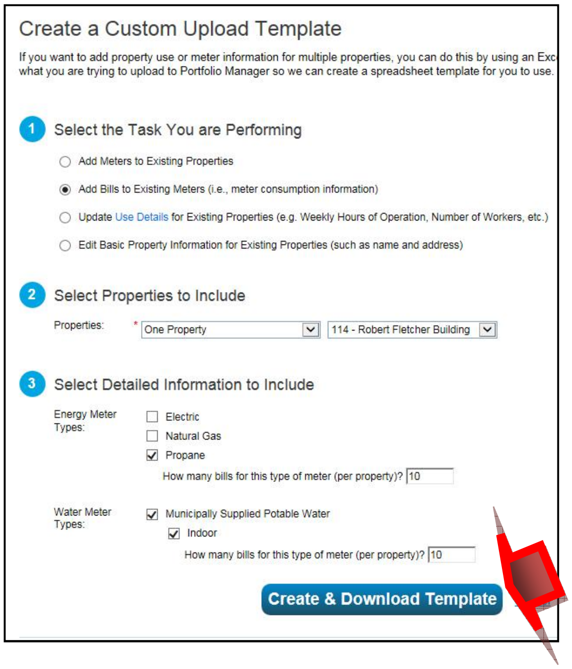
2. click! on “Create an Upload Template”



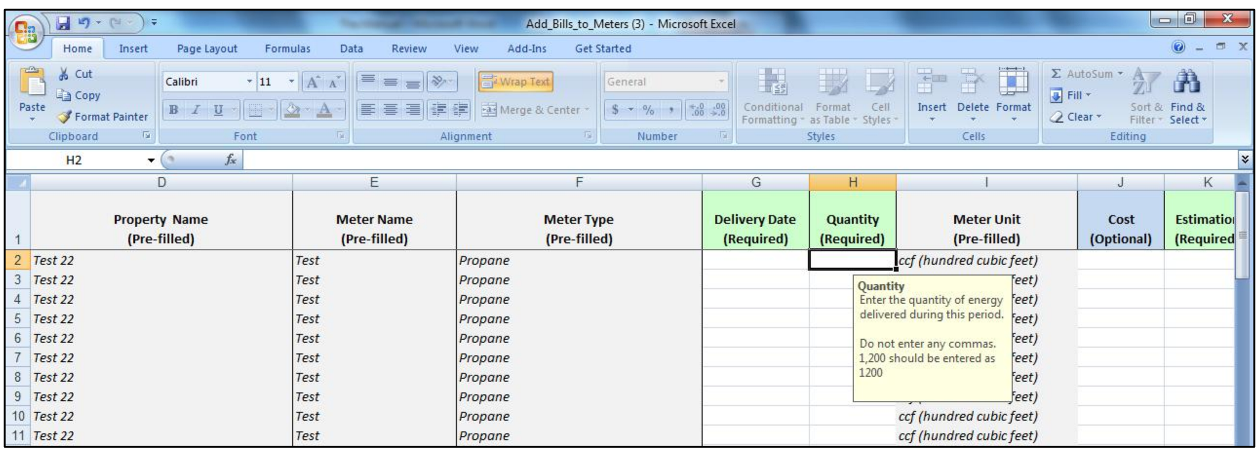
3. Select “Add Bills to Existing Meters”
4. Choose the property for which you want to add propane or water bills

   Note: You must have added the propane, water or other meters to this property first following the instructions in section 2.2

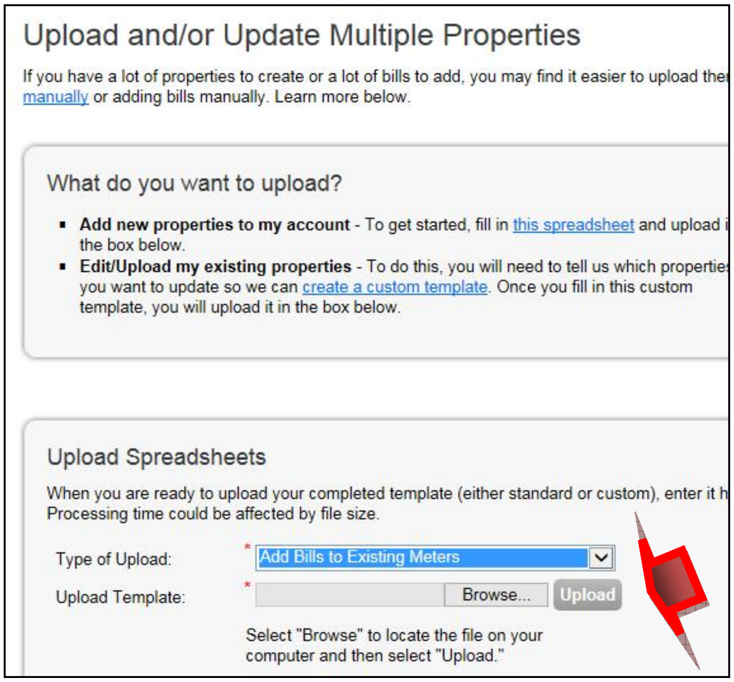
5. Choose the type of bills you want to add (Propane) and / or (Water)
6. Choose the number of bills you are entering for each meter
7. click! on “Create and Download Template”:



8. The template will generate an excel sheet which you complete by entering billing dates, quantities and costs.
9. Each utility (fuel or water) will be generated on separate tab in the Excel template



10. Once completed, save the excel spread sheet
11. Go back to “Create an Upload Template”
12. Choose the type of upload you would like to do “Add bills to existing meters”, browse the file and click! on “Upload” as shown below


Upload and/or Update Multiple Properties
If you have a lot of properties to create or a lot of bills to add, you may find it easier to upload ther
manually or adding bills manually. Learn more below.
What do you want to upload?
Add new properties to my account - To get started, fill in this spreadsheet and upload i the box below.
Edit/Upload my existing properties - To do this, you will need to tell us which propertie you want to update so we can create a custom template. Once you fill in this custom template, you will upload it in the box below.
Upload Spreadsheets
When you are ready to upload your completed template (either standard or custom), enter it h
Processing time could be affected by file size.
Type of Upload:
Add Bills to Existing Meters
Upload Template:
Browse...
Upload
Select "Browse" to locate the file on your computer and then select "Upload."

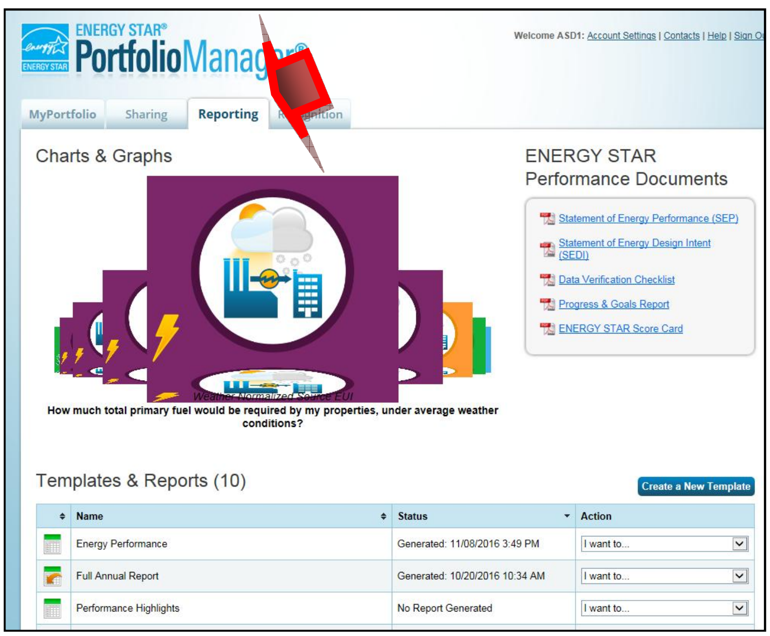
SECTION 3: REPORTS

This section provides guidance on how to create reports in Portfolio Manager to inform building operators, executive and financial officers about the cost, performance and efficiency of buildings. The reports provide energy consumption and cost, water consumption or cost, and GHG emissions.

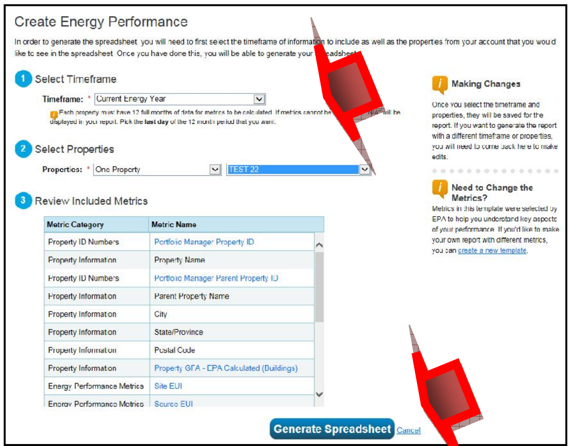
- Portfolio Manager provides standard reports for "Energy Performance", "Water Performance" and "Emissions Performance"
- You may also get a standard report on the energy performance of any of your buildings if you click! on "Statement of Energy Performance (SEP)" on the top right box. The next page will ask you to select the building and the timeframe you want the report for.
- Portfolio Manager allows you to create customized reports. Any report in Portfolio Manager can be downloaded to excel. If you are an excel user you can use pivot tables or filtering features to compare or sort details about a building or multiple buildings.

3.1 Download Standard Reports

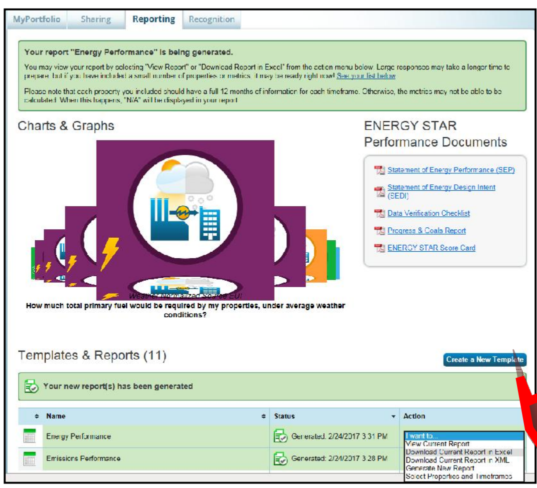
1. In your homepage, click on the reporting tab



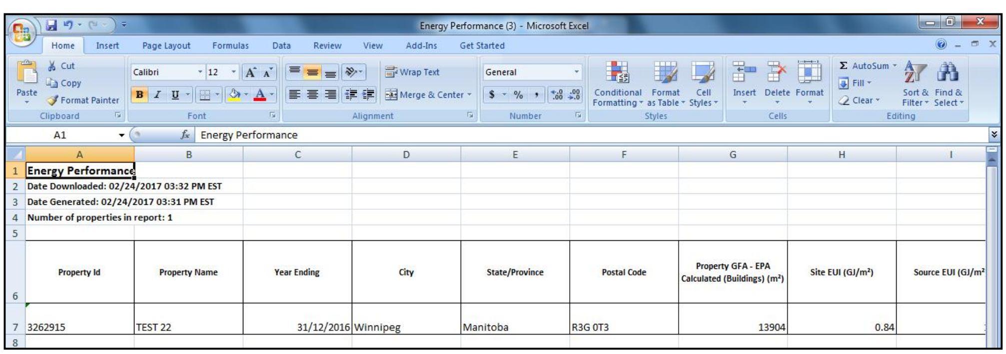
2. To get any of the listed reports for your buildings, use the action button and select "Generate New Report" from the dropdown menu
3. Select the timeframe for your report, and the buildings you would like to include



4. click! on “Generate Spreadsheet”
5. Once the report’s status turns to “Generated” as shown below, using the action dropdown you may download your report in Excel



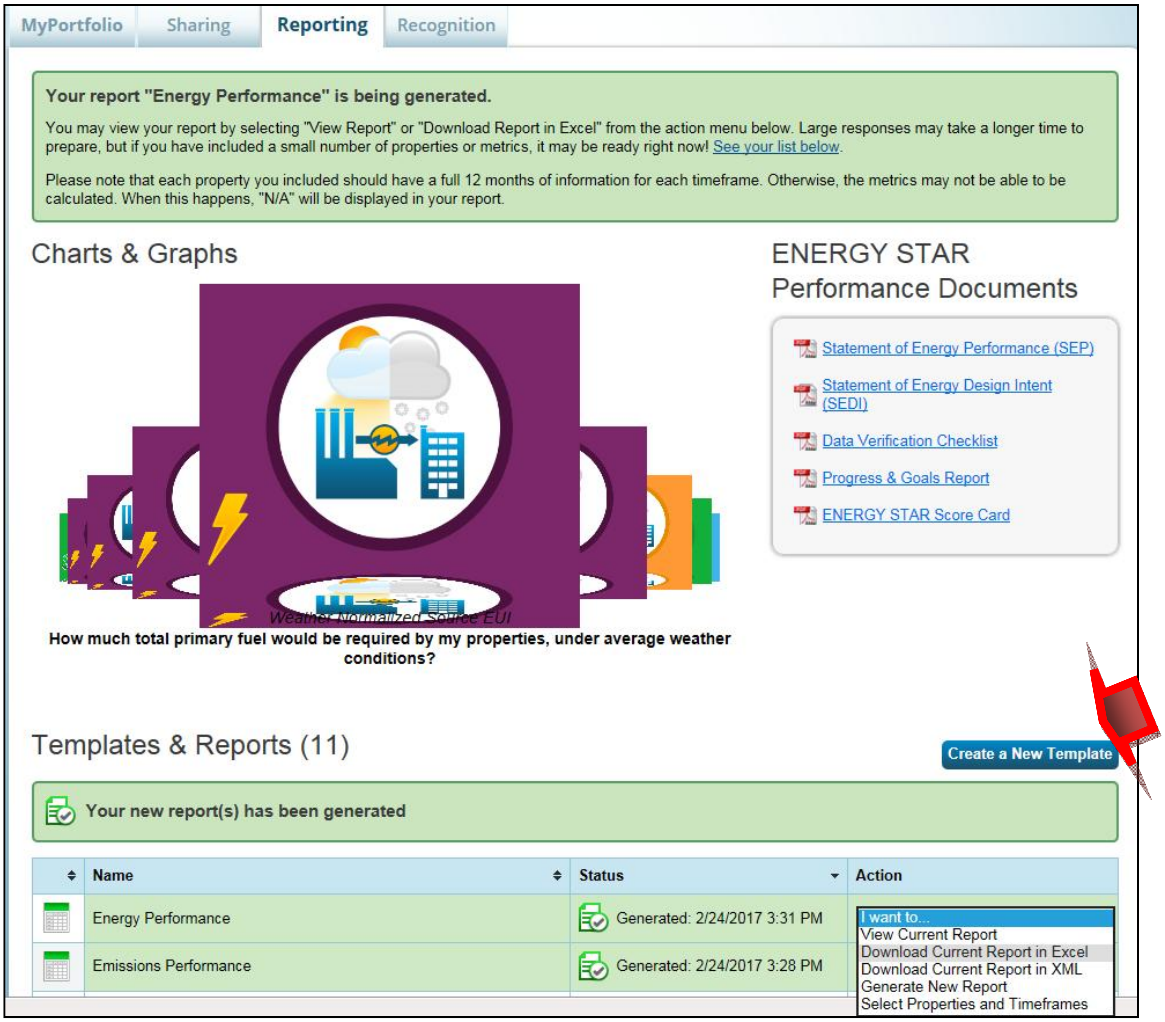
6. The report will provide data for basic energy consumption such as EUI, costs as shown below



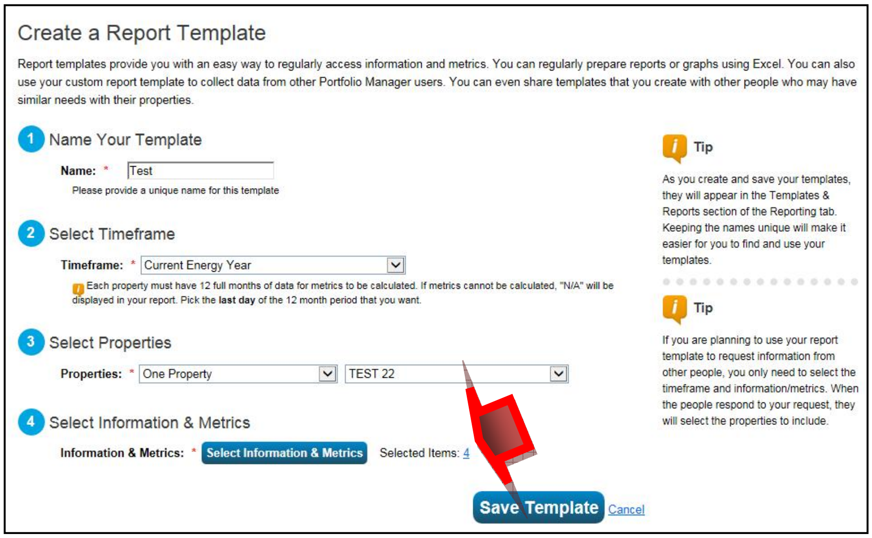
3.2 Create Custom Reports

To create a custom template in Portfolio Manager Report follow these steps

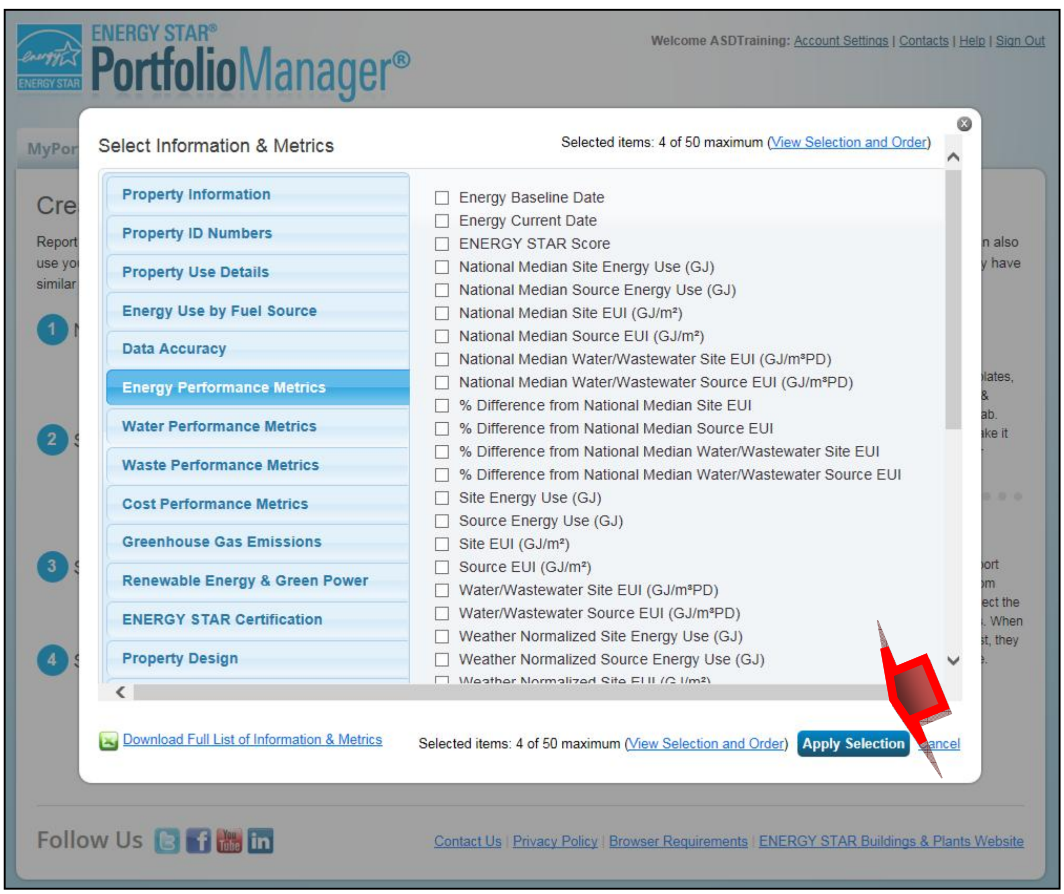
1. click! on “Create a New Template”



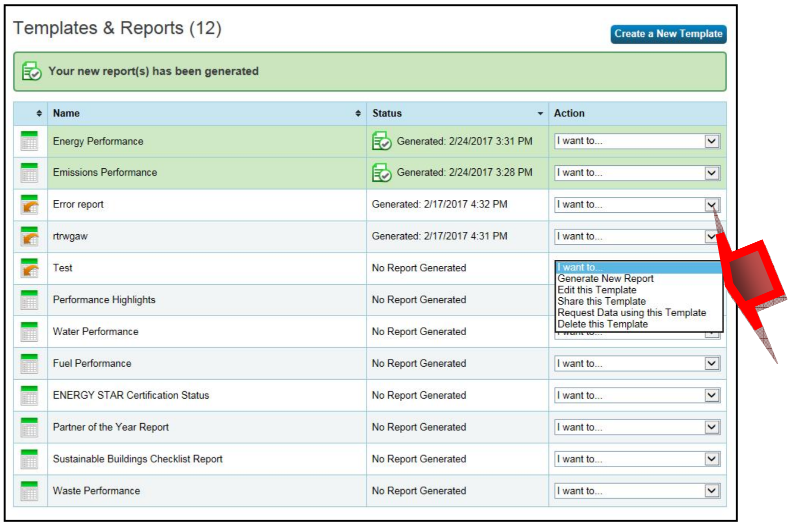
2. Write a name for your template, select a time-frame and properties
3. click! on “Select Information and Metrics”



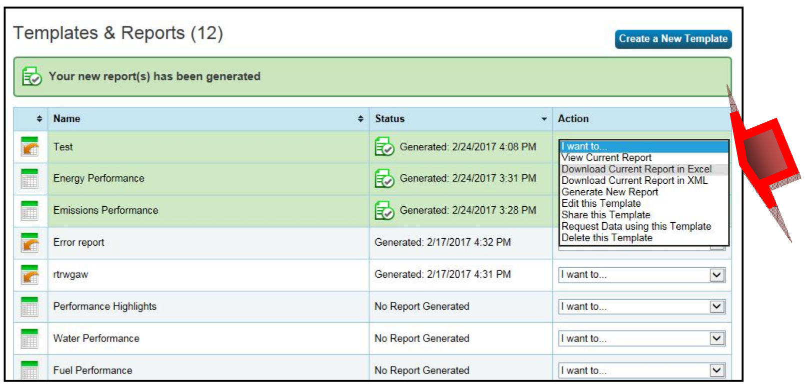
4. Choose the metrics you want to include



5. click! on “Apply Selection”
6. click! on “Save Template”
7. Choose “Generate New Report” from the dropdown menu as shown below



8. Once generated, choose “Download Current report in Excel” as follows



Note: The values listed in these reports are for the 12 months preceding the “Year Ending” date. You can customize a report to get information for specific years

Note: Energy consumption in Portfolio Manager is reported monthly, which may not exactly match your utility bills. Portfolio Manager will pro-rate the consumption on two bills to calculate monthly consumption. For example: If your bills are from the 15th of one month to the 15th of the next month, portfolio manager does the calculation to create a calendar month of data (e.g. Oct 1 -31).

If you are participating in the Manitoba Hydro upload – electricity and natural gas information is sent to Portfolio Manager monthly (based on your billing cycle). You may notice the reported site energy consumption in Portfolio Manager may not exactly match what was on the bill from Manitoba Hydro. Portfolio Manager will pro rate readings from two bills to calculate monthly site consumption.

3.3 Track Retrofit Projects

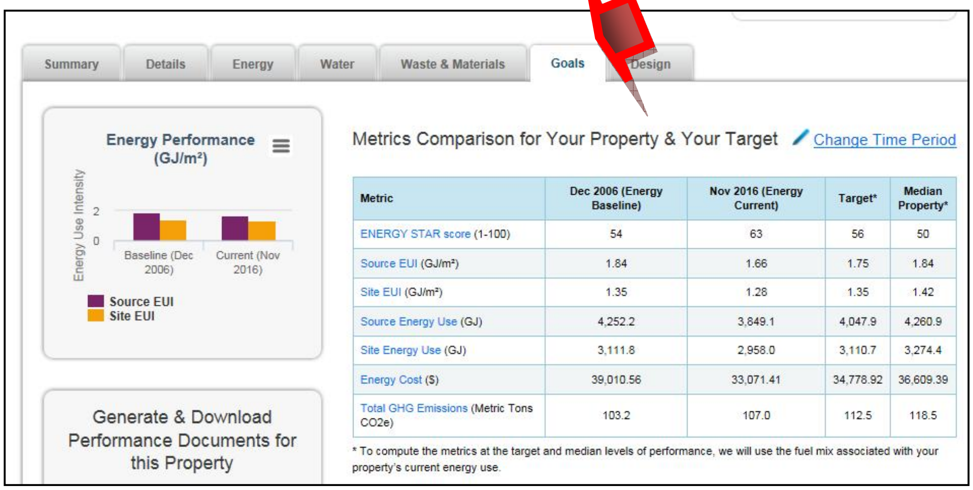
This section provides guidance on how monitor the results of a retrofit project.

You need:

Information about the retrofit or capital project (the dates, equipment cost, and estimated savings)

On your homepage

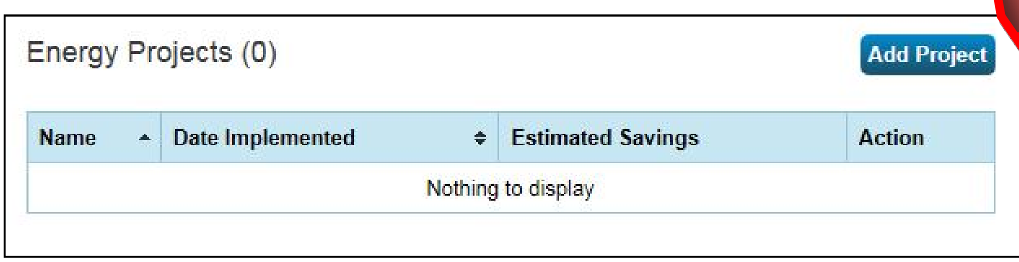
1. Select any property for which you want to add a retrofit project
2. **click!** on the "Goals" tab



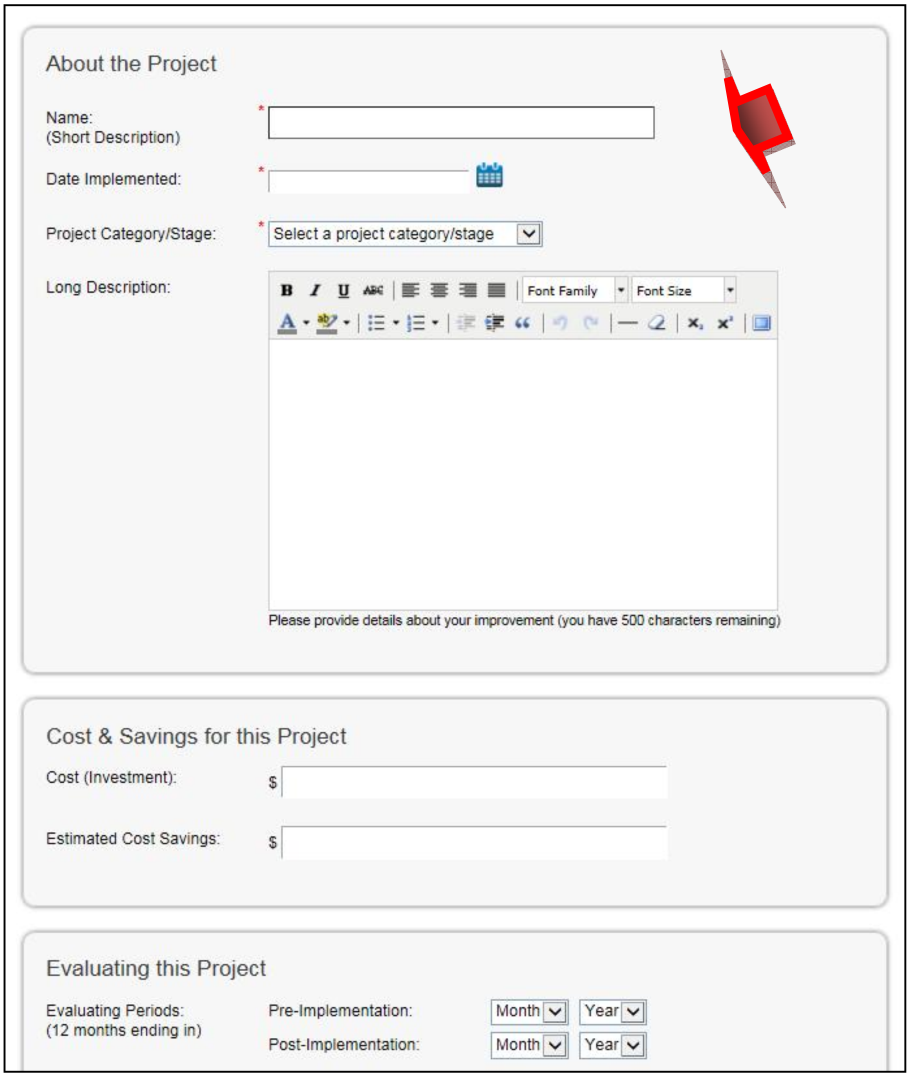
Metric	Dec 2006 (Energy Baseline)	Nov 2016 (Energy Current)	Target*	Median Property*
ENERGY STAR score (1-100)	54	63	56	50
Source EUI (GJ/m²)	1.84	1.66	1.75	1.84
Site EUI (GJ/m²)	1.35	1.28	1.35	1.42
Source Energy Use (GJ)	4,252.2	3,849.1	4,047.9	4,260.9
Site Energy Use (GJ)	3,111.8	2,958.0	3,110.7	3,274.4
Energy Cost ($)	39,010.56	33,071.41	34,778.92	36,609.39
Total GHG Emissions (Metric Tons CO2e)	103.2	107.0	112.5	118.5

* To compute the metrics at the target and median levels of performance, we will use the fuel mix associated with your property's current energy use.

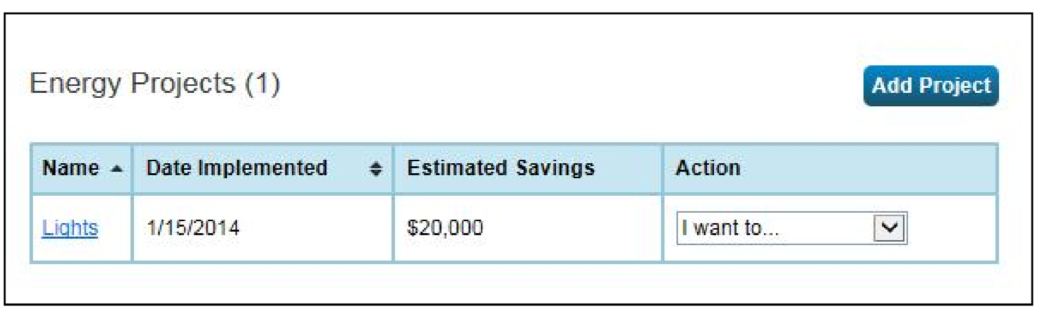
3. On this page, click on "Add Project"



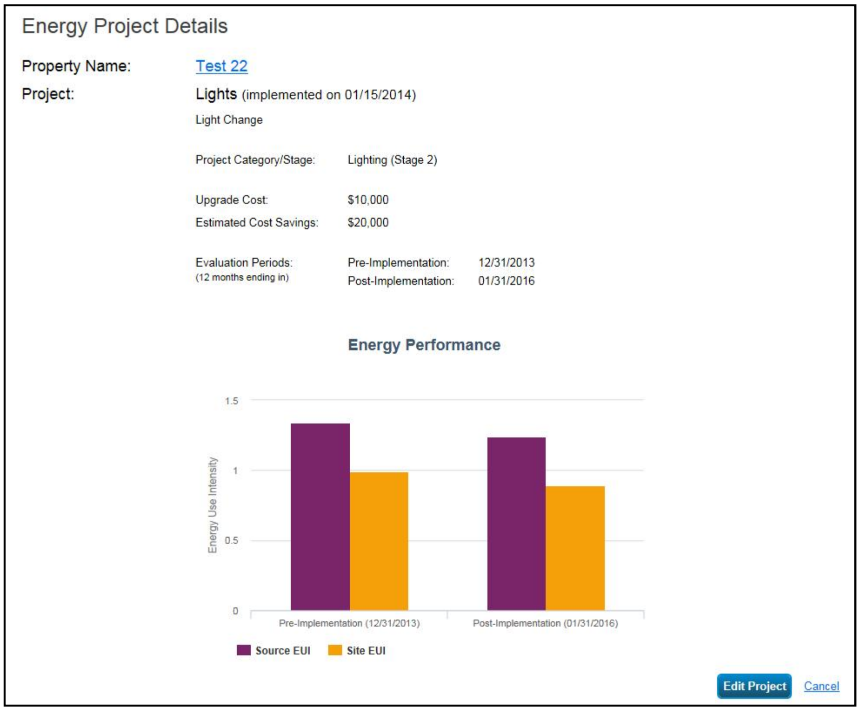
4. Enter the project description, date of implementation, estimated costs and savings, as well as the evaluation period



5. **click!** on "Save Project"
6. The project will now appear in your list of energy projects under the "Goals" tab



7. Clicking on the project will show you a quick summary of energy consumption before and after its implementation as follows



Note: For more detailed tracking of energy projects, download the energy report for your building for previous years, and compare the buildings performance for several years before and after implementing the project

In addition to using this function for tracking the outcomes of a building improvement project, consider tracking the results of a tenant education program.

SECTION 4: TROUBLESHOOTING

4.1 Correct Data Errors in Portfolio Manager

Occasionally, data-entry errors may prevent Portfolio Manager from calculating annual energy consumption for some buildings. This section addresses some of the common data-entry errors and potential ways to fix them.

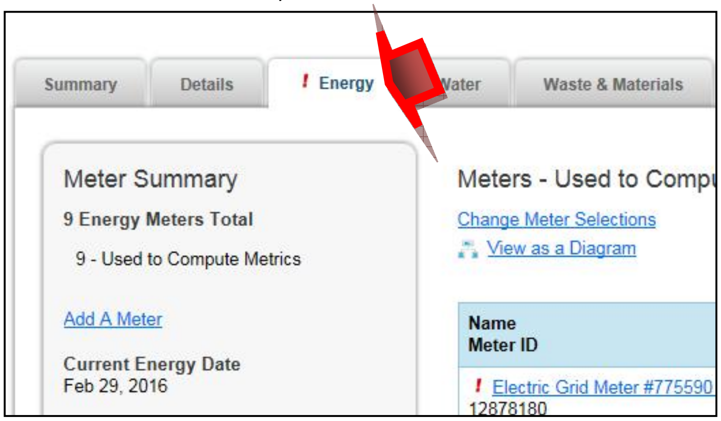
What you will need:

1. Copies of your utility bills

4.1.1 Locate data errors in small portfolios (<10 buildings)

If you have a relatively small portfolio, you can check for errors by clicking on each building individually from your homepage.

- Portfolio Manager automatically adds exclamation mark(s) ***!*** to identify potential issues (e.g. Energy or Water meters with errors) as shown below

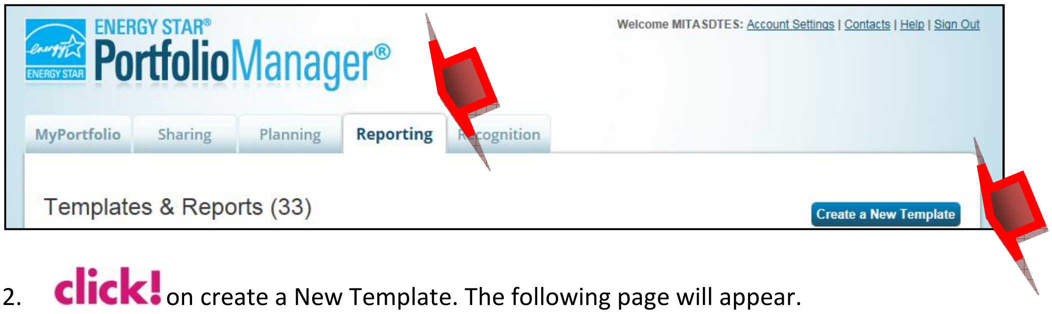


- Once you click on the meter, an error message will indicate the type and date of error(s) with this meter data.
- click! "Display All Years" in the search box.
- Based on the type of error shown, you can correct it following the suggested actions in section 4.2

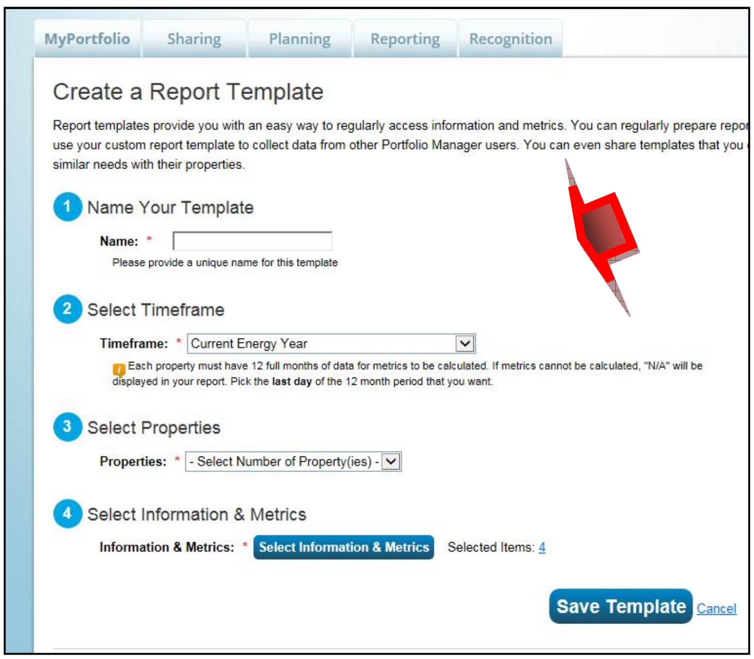
4.1.2 Locate data errors in large portfolios (>10 buildings)

If you have a large portfolio of buildings, follow these steps to identify data errors

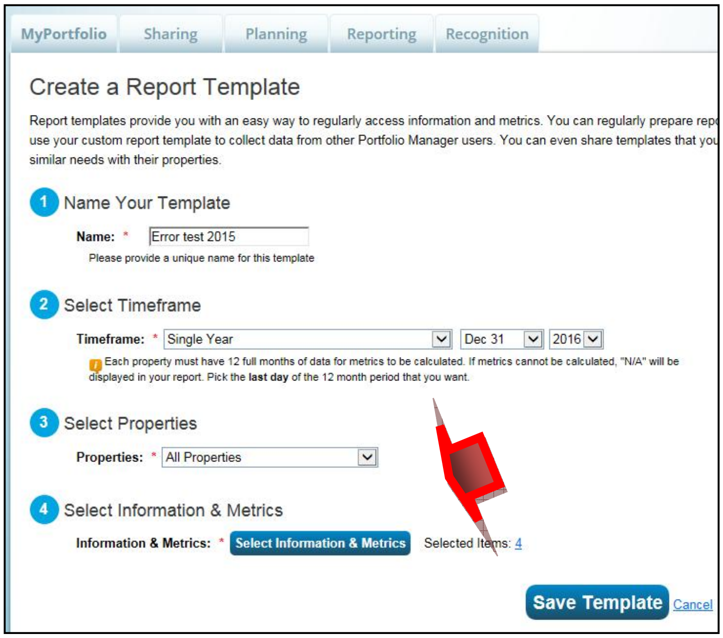
1. click! on the reporting tab once you have logged into your account



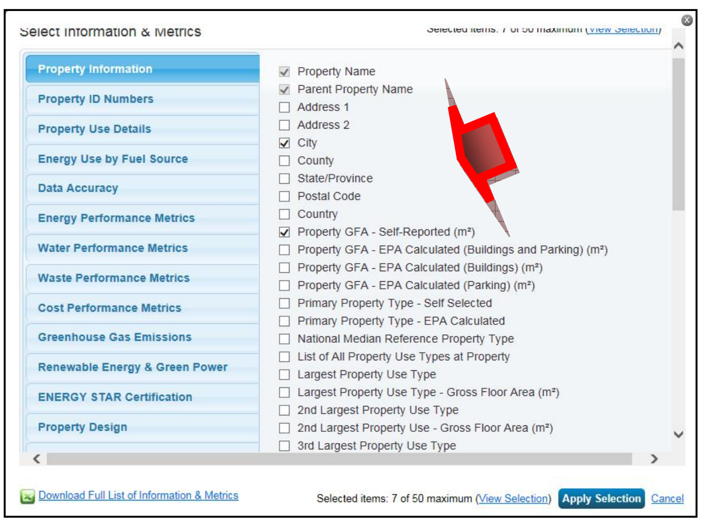
2. click! on create a New Template. The following page will appear.



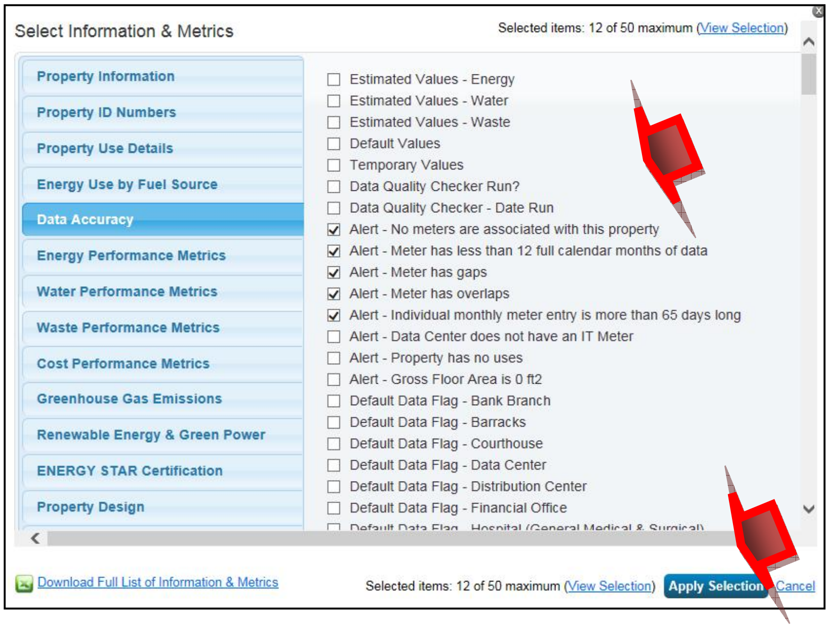
3. Create your error check template. Please note Portfolio Manager reports annual data for the 12 months prior to the date you select for a timeframe. For example, to get data for 2015, select January 31, 2016. The bill for December consumption will be added to Portfolio Manager in January. Check your Portfolio Manager account to estimate what is the best timeframe Dec. 31 or Jan. 31 to get a year of data.
   a. Enter name for your template (e.g. error test 2015)
   b. Select the time-frame to collect data for a certain year (e.g. January 31, 2016)
   c. Select the properties you want to run the tests for. Normally, it will be all properties in your portfolio.



4. click! on “Select Information & metrics”. The following page will appear



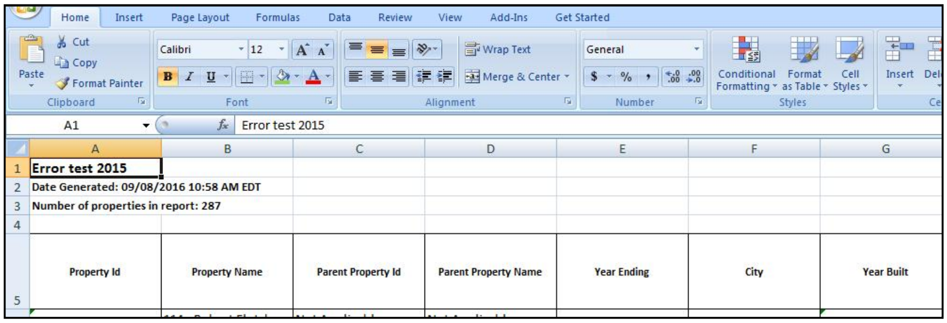
5. On the “Property Information” tab, select City, Property GFA – self reported (m2), and Year built (Property Name and Parent Property Name are automatically selected)
6. On the “Data accuracy” tab, select the following alerts



7. Just below "Data Accuracy", click! on the "Energy Performance Metrics" tab, then select Site EUI (GJ/m2), and Weather Normalized Site EUI (GJ/m2)
8. click! on "apply selection", then "save template"
9. Look for the newly created report in your "Templates and Reports" list, and then select "Generate New Report" from the dropdown menu.

10. Once generated, the report will appear at the top of your reports list. Select "Download Current Report in Excel" to download it on your computer.

11. Open the report in MS Excel, it should look similar to this



12. The alert columns should help you identify buildings which need to be corrected.

Alert Options	Meaning
Ok	The building utility data is complete and there were no errors identified
Possible issues	Some data issues exist (the selected alert helps identify the potential type of error in this case).
Unable to check (not enough data)	Not enough data exists for this building. Perhaps there are no meters associated with the building. Or there is no energy consumption data for the specific year you ran the report for.

13. What to do when you find “Possible issues” in your report?
    a. Check that a building EUI was calculated for each building in the report. If an EUI is calculated, then the error may be affecting your water bills
    b. Go to the building in Portfolio Manager.
    c. click! on the “Energy” or “Water” tab, and then click on the meter(s). You may need to click on each meter to identify all errors associated with that building. However, Portfolio Manager automatically adds an exclamation mark ! to identify meters with potential issues. Once you click on the meter, an error message will indicate the type and date of error(s) for this meter data
    d. click! on “Display All Years” in the search box.
    e. Consider the suggested actions in section 4.2 based on the alerts identified in your report and/or mentioned in the error box

4.2 Meaning of Error Messages

This section presents some of the common data errors in Portfolio Manager and suggested solutions

- Data corrections should be based on reasonable assumptions. Check the actual paper bills before you alter an entries in Portfolio Manager
- If you cannot make reasonable assumptions for correcting data errors, contact Manitoba Hydro to verify if the upload was done incorrectly

Alert type	Suggested actions
No meters are associated with this property	• Check if the appropriate meter(s) was added to the building in Portfolio Manager • Some buildings may not have meters especially if they are part of a campus
Meter has less than 12 full calendar months of data	• Check if one of the meters has less than 12 months of data for the year you ran the report for. • Meter data for your building may have only started some time during the year you ran the report for. • Contact Manitoba Hydro if you think meter data is missing for your building
Meter has gaps Portfolio Manager requires that all meters have continuous dates (and no gap in billing).	• Find the entries where the gap occurs (highlighted in red and shown in a yellow caution box at the top). • Manually adjust the start dates (or delete entries if needed) so that no gap remains. • If the gap is for a significant period of time, you may close out the old meter (by entering a "Date Meter Became Inactive" in the basic information) and create a new meter with a "Date Meter Became Active" for when your meter data begins again. • Click "Save Bills."

Meter has overlaps
 	
Portfolio Manager requires that all meters have continuous dates (and no overlap in billing).
For example:
Start date — End date
01/06/2016 — 30/06/2016
30/06/2016 — 05/08/2016
05/08/2016 — 06/09/2016
	• Find the entries where the overlap occurs (they will be highlighted in red and you will see a yellow caution box at the top).
	• Manually adjust the start dates (or delete entries if needed) so that no overlap remains.
	  ○ Make sure this doesn't affect your data accuracy
	  ○ In many cases, Manitoba Hydro may upload an estimate for a month, followed by the actual consumption for that month. In this case, you should delete the second bill of the overlapping ones confirm entries using the paper utility bill.
	• Click "Save Bills."

Individual monthly meter entry is more than 65 days long
 	
Portfolio Manager will not generate weather-normalized* source EUI data for your building if a billing cycle is longer than 65 days.
	• Manually adjust all billing periods longer than 65 days.
	  ○ If splitting data for 2 months , divide the consumption by 2 for each month
	  ○ If splitting data for 3 months, divide consumption by 3 for each month

	• Click “Save Bills.”
The date the meter became active creates a gap of missing bills entered between the date that the meter became active ...	• You can ignore this message. Generally it means the date you entered for the date the meter became active precedes the date of the billing information that was uploaded. For example if the date the meter became active was entered as Jan. 2000, and the first bill that Manitoba Hydro uploaded was Sept. 2010, the error message would appear. This does not affect reporting as long as you choose a reporting time frame that begins after the 1st bill was uploaded.

Data Errors – common fixes

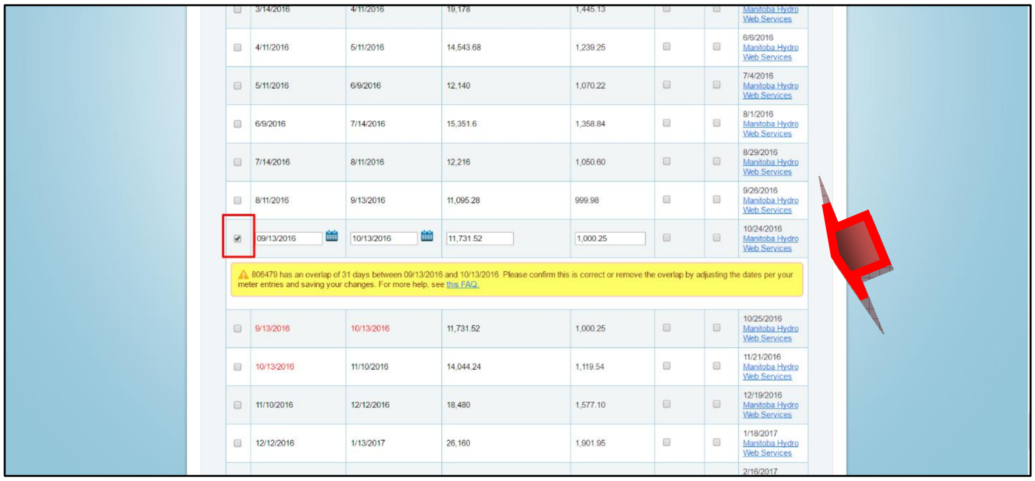
Meter Overlap 1

1. By scrolling down to the date where the error occurs, you will find the following data entry error

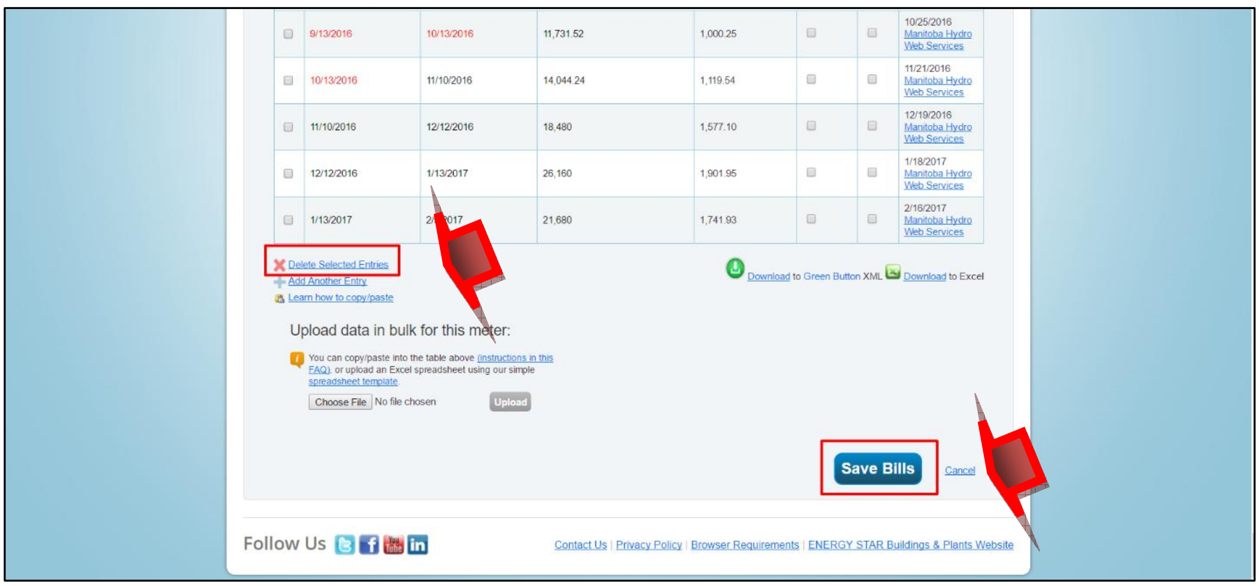
Suggested Solution:

It is possible that the first entry was an estimate entered by MB Hydro’s Auto-upload

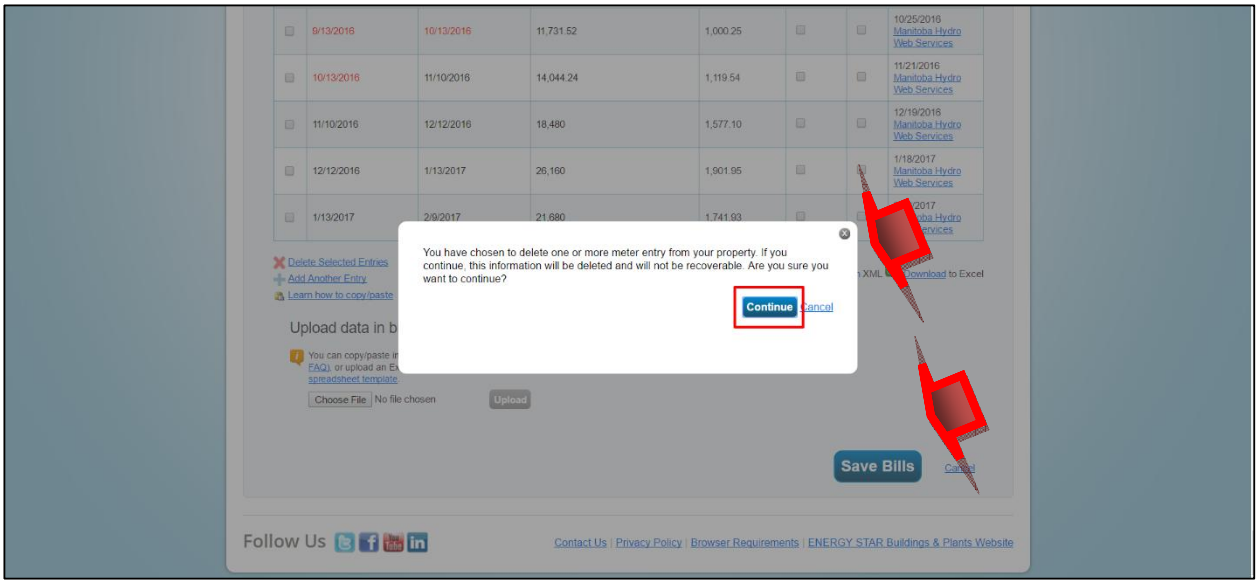
1. Check your actual paper bill to see if this is actually the case.
2. If this is the case, you may delete the first duplicate entry by checking the box beside it as follows



3. Scroll to the bottom of the page and click “Delete Selected Entries”



4. The Following message will appear



5. Click “Continue”
6. Click “Save Bills”

A green banner will appear on top of the page confirming your updates.

4.3 Frequent Issues

Negative entry

1. A meter may have a negative entry as shown below

☐	3/1/2016	4/1/2016	123,226.1	27,320.03	☐	4/25/2016 Manitoba Hydro Web Services
⚠ Natural Gas #732652 Ashdown Hall has an overlap of 32 days between 03/01/2016 and 04/01/2016. Please confirm this is correct or remove the overlap by adjusting the dates per your meter entries and saving your changes. For more help, see this FAQ.						
☐	3/1/2016	4/1/2016	-56,910.63 !	-17,131.34	☐	4/25/2016 Manitoba Hydro Web Services
☐	4/1/2016	5/1/2016	35,523.12	9,400.98	☐	5/23/2016 Manitoba Hydro Web Services

Suggested Action:

- In this case, it is possible that the second entry for March 2016 was an adjustment for the first entry which may have been estimated.
- Check your actual bills to see if you can reasonably delete the second entry and subtract the negative consumption and cost value from the first entry.
  - Consumption between 3/1/2016 and 4/1/2016 should be adjusted to 123,226.1 – 56,910.63 = 66,315.47
  - Cost should be adjusted to 27,320.03 – 17,131.34 = 10,188.69
- Ensure the end date of the last reading is the start date of the new reading

Meter Gap

The meter may have a gap between entries as shown below

☐	9/1/2016	10/1/2016	5,240.65	2,676.15	☐	10/10/2016 Manitoba Hydro Web Services
⚠ Natural Gas #732652 Ashdown Hall has a gap of 30 days between the dates of 10/01/2016 and 11/01/2016. Please confirm this is correct or remove the gap by adjusting the dates per your meter entries and saving your changes. For more help, see this FAQ.						
☐	11/1/2016	12/1/2016	33,200.23	6,285.52	☐	12/5/2016 Manitoba Hydro Web Services

- In this case, it is difficult to assume the consumption value for October 2016 based on these entries
- You may need to consult with your actual bills to add this entry manually or contact Manitoba Hydro about this issue.

No Energy Star Score

MB Hydro's Web Services uploaded my energy use history, but I still haven't received my benchmark score from Portfolio Manager

Solution #1: There are many reasons why your facility may not have a rating. The best way to find out why is to click on the link that says "N/A" next to the facility name, where the score would otherwise appear. Reasons will be displayed. Also, evaluating your data by running the Data Quality Checker can identify issues with your record. This helpful tool is found on the Summary Tab of Portfolio Manager. For additional assistance with Portfolio Manager and your benchmark score, visit the Frequently Asked Questions page here http://energystar.supportportal.com/ contact the EPA's Help Desk at buildings@supportportal.com or Natural Resources Canada benchmarking webpage

http://www.nrcan.gc.ca/energy/efficiency/buildings/energy-benchmarking/3691

Managing the Portfolio Manager Account – Account Administration

Someone left my company, how can I get access to their buildings in Portfolio Manager?

Solution #2: The fastest solution is to directly contact your former colleague ask that they transfer the properties to your account. Note that you must be connected to MB Hydro Web Services BEFORE the transfer to leave the meter sharing intact. However, if you are unable to contact this individual and EPA can verify in the database that both accounts are registered under the same company, EPA can transfer the properties on behalf of the former owner. Send EPA a request through the EPA "Ask a Question" form - be sure to include both Portfolio Manager usernames and which properties you want transferred.

To avoid similar complications and/or delays in the future, EPA strongly recommends implementing one of the following procedures:

- Create a corporate account which "owns" all of the properties. Have the Portfolio Manager administrator or co-ordinator share properties with employees' individual accounts as necessary. When an employee leaves, this main corporate account co-ordinator or administrator will "unshare" with her/him. It can then share with the account of the person taking over the position.
- Ensure that all properties are transferred to the appropriate new property data owner before an employee leaves.
- Record the username and password of your corporate account in the event your Portfolio Manager coordinator administrator is not available in the future

SECTION 5: ADDITIONAL RESOURCES

For additional help, we suggest you refer to :

- **Natural Resources Canada (NRCan) benchmarking webpage** http://www.nrcan.gc.ca/energy/efficiency/buildings/energybenchmarking/3691 or email your question to info.services@nrcan-rncan.gc.ca
- **US Environmental Protection Agency ENERGY STAR® Portfolio Manager®webpage** https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager and online helpdesk at https://portfoliomanager.zendesk.com/hc/en-us.
- **ENERGY STAR® Portfolio Manager® Training Page** https://www.energystar.gov/buildings/training/training#howto

Contacts

Manitoba Hydro	ckuleza@hydro.mb.ca phone: 204.360.4941
Green Building Coordination Team	greenbuilding@gov.mb.ca
Natural Resources Canada	Info.servicesnrcan-rncan.gc.ca

Sample Report A: Data Source: Portfolio Manager

You can use Portfolio Manager to prepare the following report. This information will be of interest to building owners, account managers, building operators and financial officers.

Building Report		Energy					Water				GHG	
Buildings	Current Year GFA (m2)	Last Year Total Site Energy Use All Sources GJ/m2	Current Year Total Site Energy Use All Sources GJ/m2	Current Year National Median	Last Year Energy Cost $	Current Year Energy Cost $	Last Year Water Use m3/m2	Current Year Water Use m3/m2	Last Year Water Cost $	Current Year Water Cost $	Last Year metric Tones CO2e	This Year Metric Tones C02e
Building A												
Building B												
Building C												
Building D												
Building E												
Building F												
Total												

Sample Report B: DATA SOURCE: PORTFOLIO MANAGER

You can use Portfolio Manager to prepare the following report. This information will be of interest to building owners, account managers, building operators and financial officers.

Monthly/Quarterly		Energy									Water		
Buildings	Current Year GFA (m2)	Electricity kWh	Electricity $	Natural Gas m3	Natural Gas $	Other Energy Use	Other Energy $	Total Energy Use GJ	Total Energy Cost $	Energy Use GJ/m2	Water Use m3	Water Cost $	Water Use m3/m2
Building A													
Building B													
Building C													
Building D													
Building E													
Building F													
Total													

SECTION 6: GLOSSARY

Energy use by type is a summary of the annual consumption of an individual type of energy (e.g. electricity or natural gas). Annual totals are available for every energy type electricity (grid, onsite solar, onsite wind), natural gas, district steam, district hot water, district chilled water (electric driven chiller, absorption chiller using natural gas, engine-drive chiller using natural gas, other), propane and liquid propane, fuel oil (no. 1), fuel oil (no. 2), fuel oil (no. 3), fuel oil (no. 4) and fuel oil (no. 5 and no. 6), diesel, kerosene, wood, and coal (bituminous and anthracite).

Units for energy, water and emissions, standard metric units include square meters for area, joules for energy, kilograms and Metric Tons for emissions and cubic meters for volumes. For example: energy use intensity (EUI) will be in gigajoules per square meter (GJ/m2). Area will be in square meters (m2). Volume of water will be in cubic meters (m3). Emissions will be in Kilograms (kg) or Metric Tons (t).

National median is the median reference point for your building based on the Commercial Building Energy Consumption Survey (CBECS). The median is a useful benchmark: 50% of properties perform below the median, and 50% perform above the median. The way the national median is determined will depend on your building.

- If your building has an energy star score, the national median is the Source EUI that will give your building an Energy Star Score of 50. This means the median is normalized to account for weather and business activity, telling you what a median building with your activities would consume.
- If your building does not have an Energy Star Score, the national median is the Source EUI from CBECS, without any normalization for either weather or operation.

Site energy is the annual amount of all energy your building consumes onsite, as reported on your utility bills. Use site energy to understand how the energy use for a property has changed over time.

Weather normalized site energy is the energy use your property would have consumed during 30-year average weather conditions.

Source energy is the total amount of raw fuel that is required to operate your building. In addition to what the property consumes on-site, source energy includes losses that take place during generation, transmission, and distribution of the energy, thereby enabling a complete assessment of energy consumption resulting from building operations. Use it to understand the complete energy impact of your building, and to compare the energy performance of buildings across your portfolio.

Weather normalized source energy is the source energy use your property would have consumed during 30-year average weather conditions.

Weather normalized metrics, which are automatically calculated in Portfolio Manager, are adjusted for the actual weather in your area. For example, if your area has a hotter than usual summer, your metrics will be adjusted because you will have to use more energy in this situation. Weather normalized metrics ensure that there won’t be a penalty for that hot summer because not all metrics are weather normalized.

Degree days measure the amount of heating or cooling necessary at your property. Degree days are measured relative to a base of 65^0 F. Above 65^0 F it is assumed that you will need to have cooling and below 65^0 F it is assumed that your building will need to have heating.

Heating Degree Days (HDD) is the equivalent number of days you would have to heat your building by 1 degree to accommodate the heating requirement. For example, if you have a day on which the temperature is 55^0 F, that day is worth 10 Heating Degree Days because it is 10 degrees below 65^0 F. HDD is calculated in this way for each day of the year and summed up to get the total HDD.

Cooling Degree Days (CDD) is the equivalent number of days you would have to cool your building by 1 degree to accommodate the cooling requirement. For example, if you have a day on which the temperature is 80^0 F, that day is worth 15 Cooling Degree Days because it is 15 degrees above 65^0 F. CDD is calculated in this way for each day of the year and summed up to get the total annual CDD.

Energy Star Score is a measure of how well your property is performing relative to similar properties, when normalized for climate and operational characteristics. The Energy Star Scores are based on data from national building energy consumption surveys, and this allows Portfolio Manager to control key variables affecting a building's energy performance, including climate, hours of operation, and building size. What this means is that buildings from around the country, with different operating parameters and subject to different weather patterns, can be compared side-by-side in order to see how they stake up in terms of energy performance. The specific factors that are included in this normalization (Hours, workers, climate, etc.) will depend on the property type. The 1-100 score is set so that 1 represents the worst performing buildings and 100 represents the best performing buildings. A score of 50 indicates that a building is performing at the national median, taking into account its size, location, and operating procedures. A score of 75 indicates that a property is performing in the 75th percentile and may be eligible to earn Energy Star certification. The 1-100 scale is based on the country in which your building is located. Properties in the US are compared to the national population of properties in the US. Similarly, properties in Canada are compared to the national population of buildings in Canada.

Greenhouse gas (GHG) emissions are the carbon dioxide (C02), methane (CH4), and nitrous oxide (N20) gases released into the atmosphere as a result of energy consumption at the building. GHG emissions are expressed in carbon dioxide equivalent (C02e), a universal measure that combines the quality and global warming potential of each greenhouse gas. Emissions are reported in four categories, each is available as a total amount in metric tons (Metric Tons C02e) or as an intensity value in kilograms per square foot (kgC02e/ft2).

Direct emissions are emissions associated with onsite fuel combustion (e.g. combustion of natural gas or fuel oil).

Indirect emissions are emissions associated with purchases of electricity, district steam, district hot water, or district chilled water. These emissions occur at your utility's plant, but they are a result of your building's energy consumption and therefore contribute to the overall GHG footprint.

Biomass emissions are emissions associated with biogenic fuels such as wood or biogas (captured methane). The only biomass fuel available in Portfolio Manager is wood. Biogenic fuels are combusted onsite, but do not contribute to direct emissions.

Total emissions is the sum of direct and indirect emissions.

SECTION 7: QUICK START

Use Portfolio Manager to collect, monitor and report building energy use/cost, water use/cost and greenhouse gas emissions.

Portfolio Manager Website https://portfoliomanager.energystar.gov/pm/login.html?lang=en

Refer to *Guide To Using Portfolio Manager in Manitoba* (the Guide) if you need to, relevant sections are indicated.

Action	Tip
1. Appoint a Portfolio Manager Co-ordinator/Administrator (PMC/A)	• Choose someone who is familiar with the processing and payment of utility bills • The responsibilities of the PMC/A are outlined in Section 1.1 in the Guide
2. Select a username and password for the organization's Portfolio Manager account	• Use the organization's name as the username. • Store the user name and password in a safe place for future reference
3. Create a list of the buildings owned by the organization	• Use the utility bills to compile a list of buildings your organization owns. The bills have some of the information you need to set up the Portfolio Manager account. • A spreadsheet will help you collect all the information you need to set up each building in Portfolio Manager. (A suggested template is provided below. If you prepare the spreadsheet in excel you can cut information from the spreadsheet and paste it into Portfolio Manager upload templates) • If you are missing information about a building, consult your facilities department.
4. Go to the website and create the Portfolio Manager account	• See Section 1.2 in the Guide

5. Add buildings to the Portfolio Manager account	• See Section 2.1 in the Guide
	• If you don't have information select default values and update it later:
	    ○ enter 1800 if you don't have a built date
	    ○ enter 1m^2 if you don't have GFA

6. Add meters for each building entered into Portfolio Manager	• See Section 2.2 in the Guide
	• When adding <u>water meters</u> select the water tab
	    ○ Change the meter default name to account number from the utility bill (unless there are multiple meters)
	• When adding <u>energy meters</u>, select the energy tab
	    ○ For electricity & natural gas meters change

- the default name to the actual meter # indicated on the Manitoba Hydro bill
  - For propane, diesel etc change the default name of the meter to the account # indicated on the utility bill

7. Register for Manitoba Hydro's Auto Upload. Connect to Manitoba Hydro Web services
   - See Section 2.3 in the Guide
   - It will take 2-3 business days for Manitoba Hydro to process the connection request.

8. Activate the upload service by providing Manitoba Hydro the account numbers and meter numbers for each building
   - See Section 2.3 in the Guide.
   - After you receive the notification from Manitoba Hydro
     - Select the buildings you want to share with Manitoba Hydro and give permission to share and exchange data.
     - Manitoba Hydro will send up to 10 years of data to the building account and upload all future utility use every time a Hydro bill is prepared.

9. Enter water and the other energy sources from monthly utility bills
   - See Section 2.5 in the Guide
   - Enter the information from the utility bill(s) when they are received and processed for payment (do not enter bills from Manitoba Hydro as the information is auto-uploaded)
   - The uploaded cost of electricity and natural gas excludes taxes.

10. Report
    - See Section 3 and Section 5 in the Guide
      - Generate reports for Financial Officers & Facility Managers
      - Compare yearly or year-to-year energy use/cost, water use/cost and GHGs

11. Account maintenance
    - See Section 4 in the Guide
    - Portfolio Manager identifies data errors with **!**.
    - Review the Portfolio Manager account monthly and fix errors.

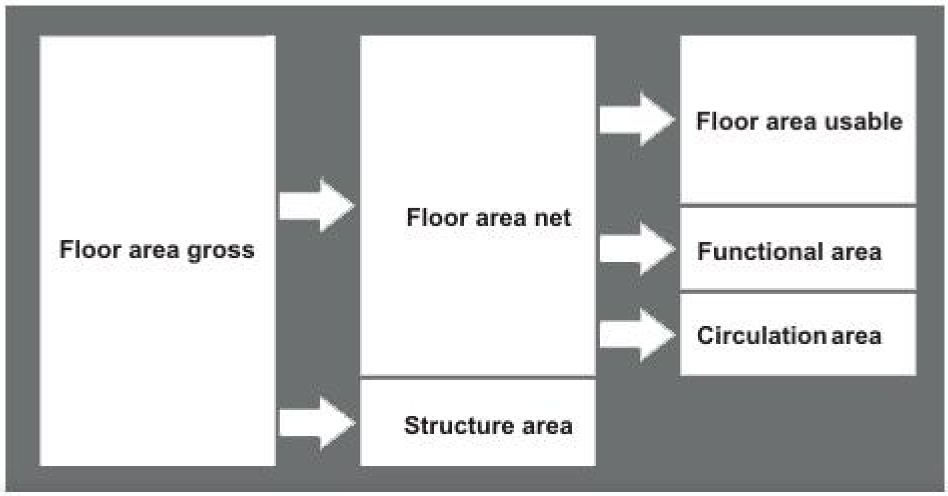
Suggested template for the building information collection spreadsheet

Building Name	Address	Year Built [A]	Building Type (office, school, hospital, etc)	Gross Floor Area [B]	Water Account #	Water Meter # [C]	Electricity MB Hydro Account Nnumber	Electricity Meter # [C]	Natural Gas MB Hydro Account Number	Natural Gas Meter # [C]	Propane Account Number	Propane Meter #	Diesel Account #	Diesel Meter #	Other energy sources
Building A															
Building B															

Definitions for using the template:

A. **Year Built. If the year built is unknown, enter year 1800. The year 1800 is obvious and it will remind you to update it later. Year built has no effect on the calculations in Portfolio Manager.**

B. **Gross Floor Area (GFA). Based on the ASHRAE definition, GFA is the sum of the floor areas of the spaces within the building, including basements, mezzanine and intermediate-floored tiers, and penthouses with headroom height of 2.2 meters or greater. GFA is not the same as building area. Building area means the greatest horizontal areas of a building above grade, within the outside surface of exterior walls or within the outside surface of exterior walls and the centerline of firewalls. Building area projects the biggest footprint on the "grade" wall, or from the mid-point of common walls.**



C. **If a building has more than one meter for a water or energy source you must enter each meter and the associated meter number into Portfolio Manager. Use meter numbers to track that the use and cost has been provided by the utility company for billing period. Count the number of meters for water and each energy source, the number of meters will be helpful if you decide to create a template in Portfolio Manager to upload water and energy bill information for multiple buildings at a time. For instructions on how to upload spreadsheets into Portfolio Manager refer to the Guide, Section 2.2.2, and Section 2.5.**