

JULY 9TH, 2024

Getting Started with *Energy Star Portfolio Manager* and Benchmarking Compliance in Ontario

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Agenda

- 3/48 ● Key principles of energy benchmarking
- 8/48 ● Ontario's energy and water reporting and benchmarking initiative (EWRB)
- 13/48 ● Features and benefits of ENERGY STAR® Portfolio Manager®
- 20/48 ● Start a portfolio with ENERGY STAR® Portfolio Manager®
- 28/48 ● Adding a property and entering use details
- 41/48 ● Entering consumption data



Key Principles of Energy Benchmarking

The benefits of energy disclosure and benchmarking

Energy reporting

Building energy reporting is essential for understanding how energy is consumed within a building and for identifying opportunities to **improve efficiency**, **reduce costs**, and **minimize environmental impact**.

Key advantages of energy reporting



Identification of inefficiencies



Cost savings



Compliance with regulations



Benchmarking



Optimization of operations

What is energy benchmarking?

Energy benchmarking allows you to

- Identify poorly performing buildings.
- Establish a baseline for **measuring improvement**.
- Reward efficient buildings and create competition through comparison.
- Participate in **certification and environmental initiatives**.

Energy benchmarking is a comparative analysis

- **Internal process:** measuring against past performance of other buildings in your portfolio.
- **External process:** comparing to similar buildings outside your organization.

Benefits of energy benchmarking

Benchmarking is an important tool for improving energy performance.

- 1 • Provides information on energy use
- 2 • Increases awareness of energy efficiency
- 3 • Identify best practices, by drawing inspiration from the best-performing buildings
- 4 • Classifies buildings based on their performance, to help determine and prioritize investment projects, in the most energy-intensive or GHG-emitting facilities
- 5 • Helps to identify energy-saving measures and reduce energy bills

Fun fact

“

Although comparative analysis does not involve physical decarbonization actions, the influence thereof leads to an estimated **performance improvement of 2.4%** without major investments. Comparative analysis also serves to support the establishment of carbon neutrality strategies.

”

CPEQ (2023). Achieving Carbon Neutrality in Businesses, p. 35



Ontario's Energy and Water Reporting and Benchmarking initiative (EWRB)

[Report energy and water use in large buildings | ontario.ca](#)



Ontario's EWRB initiative

50,000 ft²

If you own, manage, or represent a building that's **50,000 ft²** or larger, you are required by the Ontario government to report its energy and water use annually **by July 1**

Some buildings can qualify for a reporting exemption



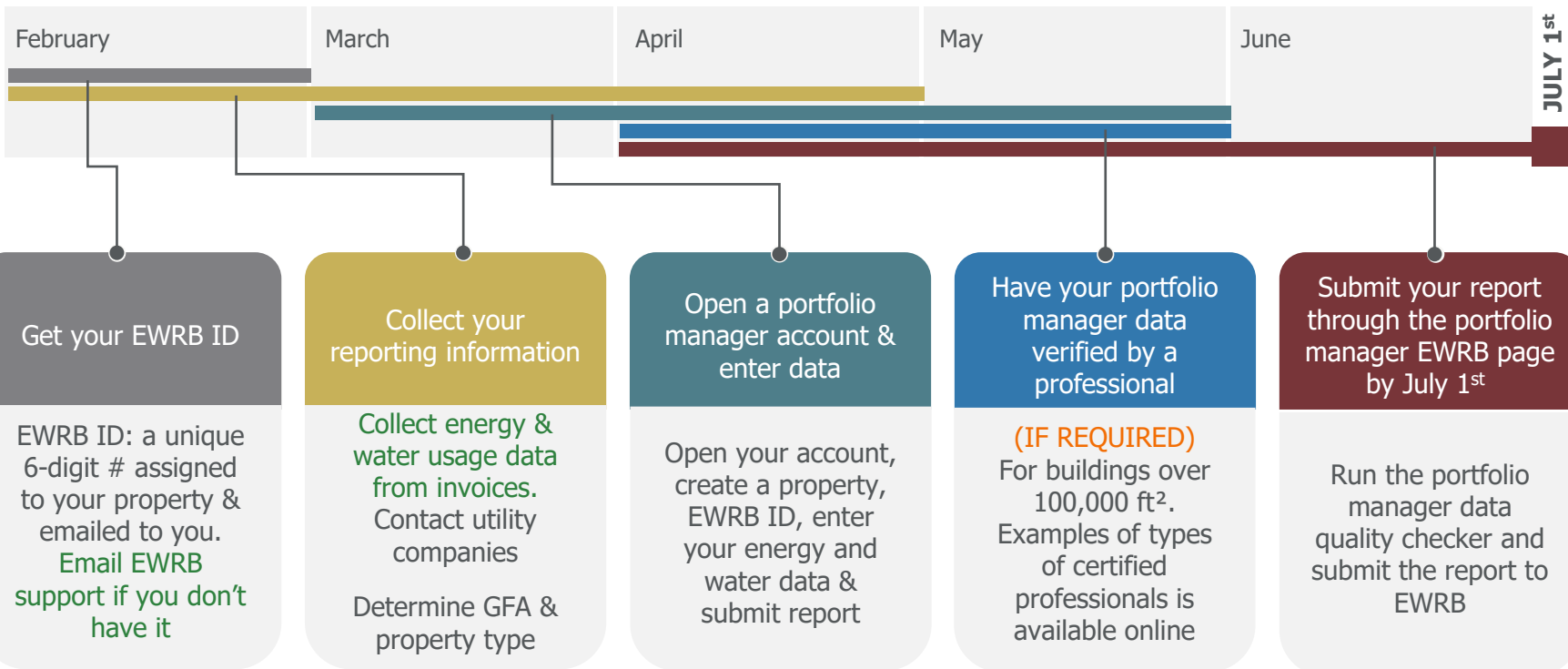
100,000 ft²

If your building is **100,000 ft² or larger**, the report information must be **verified by a certified professional** the first time you report, then every 5 years

EWRB reporting checklist

1. [Report energy and water use in large buildings | ontario.ca](https://www.ieso.ca/en/Reporting-and-Assessment/EWRB/Reporting-Requirements/Reporting-Requirements-for-Large-Buildings)
2. [Information you need for reporting | Guide to energy and water reporting | ontario.ca](https://www.ieso.ca/en/Reporting-and-Assessment/EWRB/Reporting-Requirements/Reporting-Requirements-for-Large-Buildings/Information-you-need-for-reporting)
3. [Guide to energy and water reporting | ontario.ca](https://www.ieso.ca/en/Reporting-and-Assessment/EWRB/Reporting-Requirements/Reporting-Requirements-for-Large-Buildings/Guide-to-energy-and-water-reporting)

Complete guide



EWRB exemptions

Ongoing exemption

Building owners are eligible for an ongoing exemption from the reporting requirement if they meet one or more of the following criteria:

- At least 50 per cent of the gross floor area of the building is occupied by a public agency.
- At least 10 per cent of the gross floor area is occupied by a data centre, television studio or trading floor.
- At least 10 per cent of the gross floor area is used for manufacturing processing, commercial processing, agricultural processing or industrial processing, if the environmental conditions within the property are governed mainly by the operations or processes within the building.

[Who is exempt from reporting? | Guide to energy and water reporting | ontario.ca](#)

One-year exemption

Building owners are eligible for an exemption from the reporting requirement for a calendar year if they meet one or more of the following criteria:

- At any time during the reporting year, any owner of the property is an insolvent person as defined in the *Bankruptcy and Insolvency Act* (Canada).
- At any time during the reporting year, the property is subject to:
 - a tax arrears certificate that has been registered against the property
 - a power of sale or foreclosure under a mortgage
 - a writ of execution
- The property is newly constructed, and a certificate for the occupancy of the property is issued in that year.

If you believe that your property is eligible for a one-year exemption from reporting, **you must complete an exemption notice.**

EWRB examples of certified professionals

Examples of acceptable accreditation bodies include:

- American Society of Heating, Refrigeration and Air Conditioning Engineers
- Association of Energy Engineers
- Building Owners and Managers Institute International
- Canadian Institute for Energy Training
- International Association of Certified Indoor Air Consultants
- International Code Council
- International Facility Management Association
- Ontario Building Envelope Council

[Information you need for reporting | Guide to energy and water reporting | ontario.ca](#)

Examples of acceptable accreditations and certifications include:

- Building Energy Technology Certificate
- Building Operator Certification
- Building Science Specialist of Ontario
- Certified Building Commissioning Professional
- Certified Energy Auditor
- Certified Master Inspector
- Certified Measurement and Verification Professional
- Condominium Manager (general license or transitional general license)
- Certified Professional Accountant
- Professional Engineers of Ontario
- Portfolio Manager certifications



Features and benefits of ENERGY STAR® Portfolio Manager®

Getting started, Key Features, Performance Score, and more.

Introduction ESPM

NRCan has been collaborating with the EPA since 2011 to create a common platform for measuring and assessing the energy performance of commercial and institutional buildings in the US and Canada.

The Canadian adaptation was launched in 2013 and is continuously improved and adapted.

Portfolio manager is a **free, online, and secure platform.**

Not just a benchmarking tool! It also allows

- Reporting for provinces and municipalities
- Upload energy data from utilities – web services
- **ENERGY STAR** building certification for high-performance buildings

ENERGY STAR® Portfolio Manager – key features

Over 150 metrics and calculations

Normalized EUI site/source

GHG emissions

Waste/water benchmarking

Comparison of EUI with buildings nationwide

1-100 ENERGY STAR scores

Canadian adaptation of ENERGY STAR Portfolio Manager

- SI/metric units
- Canadian weather stations
- Bilingual interface (English/French)
- Based on Canadian national building survey (SCIEU 2009, 2014)

Management functions

Tracks consumption, cost data, trends

Web services

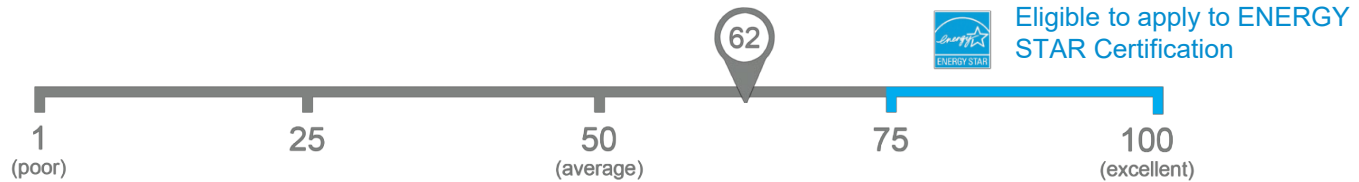
Sharing

Reporting

Certification

ENERGY STAR performance score

The ENERGY STAR score, is expressed as a number on a 1 to 100 scale, and rates performance on a percentile basis.



For example

- Buildings with a score of 50 perform better than 50% of their peers
- Buildings earning a score of 75 or higher are in the top quartile of energy performance and can apply for an ENERGY STAR Certification



ENERGY STAR performance score

- Evaluates performance for the whole building
- Reflects actual energy use
- Accounts for all different energy sources
- Normalizes for business activity and climate
- Provides comparisons against a national reference building of similar size and/or function as modelled from the SCIEU survey
- Can be used to compare building performance over time



Eligible building types –1-100 ENERGY STAR score

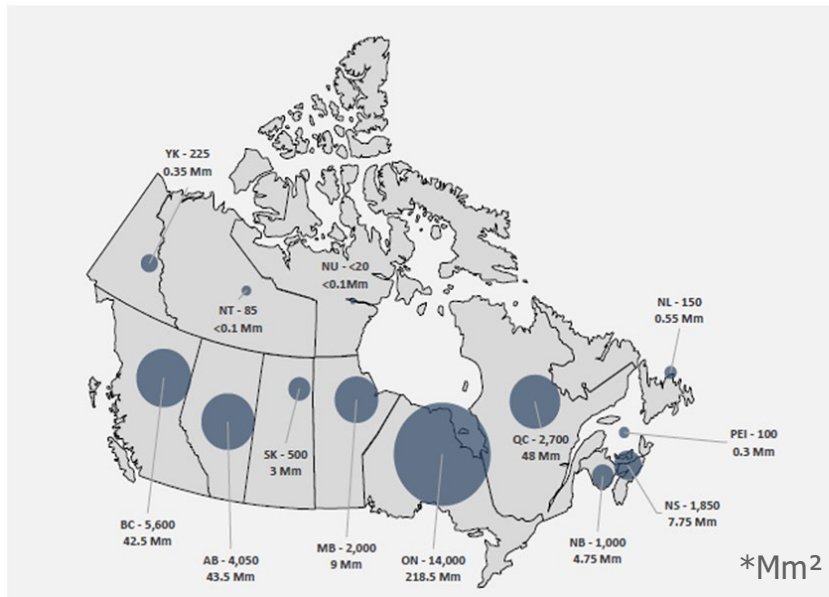
Among the more than **80 property types** built into portfolio manager, these are eligible :

1. Hotels
2. Retail stores
3. Warehouses
4. K-12 schools
5. Office buildings
6. Medical office buildings
7. Hospitals
8. Supermarkets
9. Residential care facilities/senior care community buildings
10. Ice rinks/ice rinks with curling rinks
11. Multifamily buildings (MURBs)
12. Bank branch (new August 2023)
13. Postal offices/mail centers (new August 2023)
14. Worship facilities (new August 2023)
15. Museums (new February 2024)
16. Libraries (new February 2024)

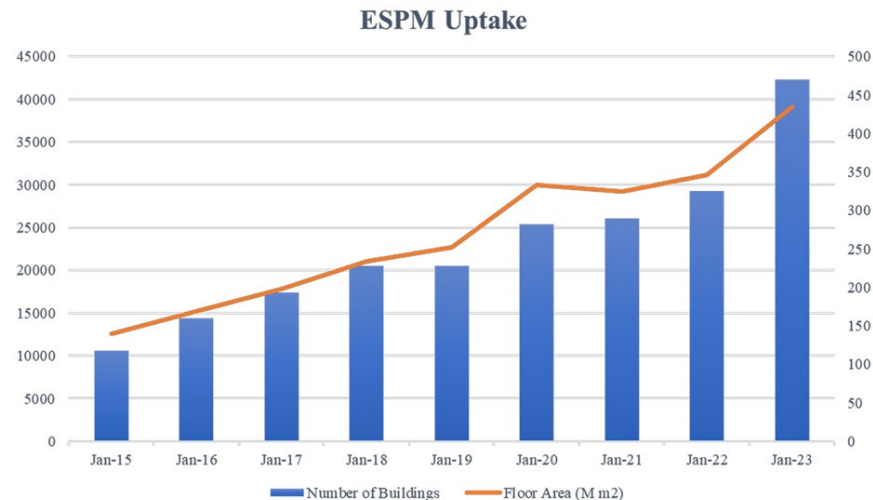
Even if your property type is not eligible to receive a 1-100 ENERGY STAR score, there are many reasons to use Portfolio Manager.



ENERGY STAR® Portfolio Manager® usage trends



ENERGY STAR® Portfolio Manager® usage per province and territories (Summer 2023)



ENERGY STAR Portfolio Manager® growth



Start a Portfolio with ENERGY STAR® Portfolio Manager®

Getting started and Navigating Portfolio Manager

Take a couple minutes to create your **FREE** account

ENERGY STAR **PortfolioManager**[®]

Help
Language: [English](#) | [Français](#)

Welcome to Portfolio Manager
Helping you track and improve energy efficiency across your entire portfolio of properties.

Username: *

Password: *

[I forgot my password.](#)
[I forgot my username.](#) **Sign In**

Create a New Account

[ENERGY STAR Buildings Homepage](#)

[Take a Training](#)

[Learn More About Portfolio Manager](#)

These links provide more information from ENERGY STAR and are not available in French.

You are accessing a U.S. Government information system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and subject to criminal and civil penalties. Use of the system indicates consent to monitoring and recording.

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[ENERGY STAR Portfolio Manager : login](#)

Or type *Energy Star Portfolio Manager* into Google

Energy Star (.gov)
<https://portfoliomanager.energystar.gov/login>

Login - ENERGY STAR Portfolio Manager

Helping you track and improve **energy efficiency** across your entire **portfolio** of properties.
Username: *. Password: ...

Practice with NRCAN samples

Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out
ESPM_NB_POWER: Settings Notifications

MyPortfolio Sharing Reporting Recognition

Properties (0)
[Add a Property](#)

Manage Portfolio

- [Upload and/or update multiple properties](#) at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.
- [Download your entire portfolio to Excel](#) or create a [custom download](#).
- [Set a portfolio baseline and/or target](#) to help measure progress.
- [Add sample properties](#) to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.
- [Delete](#) properties from your account.

[Set up your first property](#) [Add up to five sample properties](#)

[Add sample properties](#)

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Add two sample NRCAN property types

You may want to add sample properties to your portfolio in order to test out available features and see the look of a complete property within Portfolio Manager.

Select the properties you would like to add to your portfolio:

- US Sample K-12 School
- US Sample Library
- US Sample Office
- US Sample University (including one child building)

- Canadian Sample Hospital
- Canadian Sample Hotel
- Canadian Sample Ice Rink
- Canadian Sample K-12 School
- Canadian Sample Library
- Canadian Sample Medical Office
- Canadian Sample Multifamily
- Canadian Sample Office
- Canadian Sample Retail
- Canadian Sample Senior Care
- Canadian Sample Supermarket
- Canadian Sample University (including one child building)
- Canadian Sample Warehouse

[Add Sample Properties](#)

3

Refreshing your portfolio

After adding your buildings, click **Refresh Metrics**, and **Refresh Chart** to view your data

The screenshot shows the MyPortfolio dashboard interface. At the top, there are tabs for 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. A green notification bar at the top states 'Your account has been updated.' Below this, there are two main sections:

- Properties (2)**: A section with an 'Add a Property' button.
- Dashboard (Metrics current as of 02/12/2024 02:50 PM EST)**: A section containing a search bar, a 'Refresh Metrics' button (highlighted with an orange box and an arrow), and a table of properties.

The table displays the following data:

Name	Energy Current Date	ENERGY STAR Score	Site EUI (GJ/m ²)	Source EUI (GJ/m ²)
NRCAN/RNCAN Sample Office 32781146	03/31/2023	78	0.65	1.08
NRCAN/RNCAN Sample Retail 32781120	03/31/2023	66	1.04	1.20

Below the table are navigation buttons: 'First', 'Previous', 'Page 1 of 1', 'Next', 'Last', and a dropdown menu set to '100'. A 'View 1 - 2 of 2' indicator and a 'Download Data Table' link are also present.

On the left side of the dashboard, there is a **Site EUI Trend (GJ/m²)** chart. It includes a 'Change Metric' link and a 'Refresh Chart' button (highlighted with an orange box and an arrow). The chart shows data points for the years 2019, 2021, and 2023. Below the chart, it states '(Chart current as of 02/12/2024 02:50 PM GMT-0500)'.

Navigating – home page

To return to the home page, click on the **MyPortfolio** tab or on the **logo**.

Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out
del_bomaquebec: Settings Notifications

MyPortfolio Share Reporting Recognition

Properties (346)
[Add a Property](#)

Total (Location-Based) GHG Emissions Trend (Metric Tons CO2e)
[Change Metric](#)

150k
100k
50k
0

2012 2014 2016 2018 2020 2022

(Chart current as of 11/30/2023 02:50 PM GMT-0500) [Refresh Chart](#)

Dashboard (Metrics current as of 01/22/2024 04:29 PM EST) [Refresh Metrics](#)

Search by ID or Name

View All Properties (346) | Vue DÉ1 3

[Add/Edit/Delete Groups](#) [Add/Edit/Delete Views](#)

Name	Energy Current Date	Property Data Administrator - Email	Last Modified Date - Non-Electric Non-Gas Energy Meters
0087 CENTRE SPORTIF PIERRE-CHARBONNEAU 6073549	12/31/2022	energie@ville.montreal.qc.ca	06/21/2023 01:52 PM EDT
0142 BIBLIOTHEQUE CENTRE COMMUNAUTAIRE CDN-NORD 6098874	03/31/2020	energie@ville.montreal.qc.ca	NA
0315 ARÉNA AHUNTSIC 6049339	05/31/2021	energie@ville.montreal.qc.ca	NA

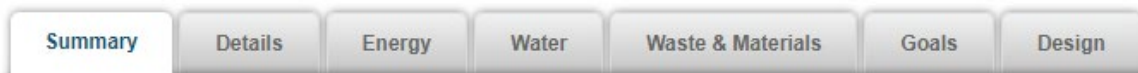
Navigating – different tabs

4 tabs for various actions at the portfolio Level



7 tabs for each property

Name	Energy Current Date	ENERGY STAR Score	Site EUI (GJ/m ²)
NRCAN/RNCAN Sample Hotel 33647793	03/31/2023	79	0.84
NRCAN/RNCAN Sample Multifamily 33647810	12/31/2021	12	0.97




Intuitive navigation and multiple ways to get to the same place



Need help

Portfolio manager is a user-friendly tool with tremendous help resources built-in to answer most questions or issues

- Read the  Tip
- Point/hover over the **blue text** to view more details
- Click on the **blue underlined text** to be redirected to the proper section of the tool



i Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

i Tip

Not sure what kind of property you're benchmarking, you want to select the property type that best reflects activity in the majority of your tenants with different business types, just select the main activity.

i Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

Gross Floor Area

The Gross Floor Area (GFA) is the total "property" square footage, and a "property" can be a:

- Single building
- Campus of buildings
- Part of a building (such as a single tenant space).

Depending on which above type you have, your exact GFA is determined differently:


1. "Single buildings" and "campuses of buildings" measure... (Click to view the full term in the glossary)

Still need help

Go to the NRCan website and read the FAQ section

Benchmarking - Frequently Asked Questions

ENERGY STAR Benchmarking for Buildings in Canada

 We are currently improving our FAQs with new and updated questions to help with your concerns. If you have additional questions, please contact us at nrcan.buildings-batiments.nrcan@canada.ca

1. Energy Benchmarking

1. [What is energy benchmarking?](#)
2. [What are the benefits of benchmarking?](#)
3. [How much does benchmarking cost?](#)

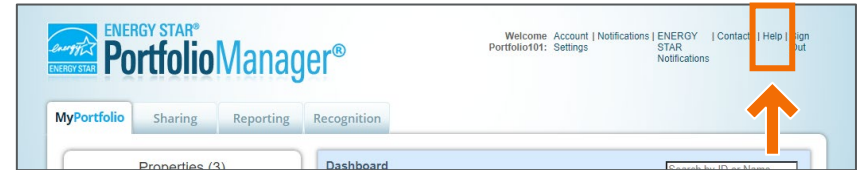
2. ENERGY STAR Portfolio Manager – General

1. [What is ENERGY STAR Portfolio Manager?](#)
2. [How can I get training on Portfolio Manager?](#)
3. [How does the ENERGY STAR 1-100 rating system and the ENERGY STAR score work?](#)
4. [What property types are eligible to receive a 1-100 ENERGY STAR score?](#)
5. [Does Portfolio Manager use metric or imperial units?](#)
6. [Will a score for multi-unit residential buildings and high-rise apartments be available anytime soon?](#)

<https://www.nrcan.gc.ca/energy-efficiency/energy-star-canada/benchmarking-frequently-asked-questions/3787>



Use the Help Menu



Contact an NRCan specialist directly



nrcan.buildings-batiments.nrcan@canada.ca



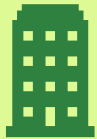
Adding a Property and Entering Use Details

Adding a property and its building use details (occupancy, area, date of construction and more).



First, Gather the Required Information

For all Building Types



Property Information

Building coordinates
Construction year
Gross floor area
Primary function



At least 12 months of data

Utility bills (water, energy)
On-site generated (water, energy)
Quantity of waste and recycling

Based on the Building Type



Property Use Details

Examples:

- Operating hours
- No. of computers
- No. of workers

Building use details vary per building type (i.e. Hotel vs. Office)



For Proper Data-Collection Use

ENERGY STAR® PortfolioManager®

Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out
Portfolio101: Settings Notifications

Portfolio Manager: What data is required to benchmark your property?

You can benchmark almost any type of property in Portfolio Manager! The information required varies depending on the type of property and whether or not the property is eligible for an [ENERGY STAR Score](#).

Pick your country and property type to get started.

Country: [Why is this needed?](#)

Property Type:

[Add Another Use Type](#)

You can look up more than one use type if needed. [Learn more about when to use different use types when setting up your property.](#)

Lookup Required Data

What Metrics Are Available?

All properties are eligible to receive metrics such as [Source EUI](#) by providing [Gross Floor Area](#) and 12 months of energy usage. The [ENERGY STAR Score](#) is available for specific property types and requires additional information. [Learn more about eligibility for the ENERGY STAR Score.](#)

.....

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Data Collected for All Properties

- Property Name
- Property Address
- Total Gross Floor Area of Property
- Irrigated Area
- Year Built/Planned for Construction Completion
- Occupancy
- Number of Buildings
- 12 consecutive months of energy data

Additional Data Collected for College/University

The following information is **required** for basic metrics.

- Gross Floor Area

The following information is **optional** and not used in any metrics.

- Weekly Operating Hours
- Enrollment
- Number of Full Time Equivalent (FTE) Workers
- Number of Computers
- Grant Dollars


Start Collecting Data

Create a document with the information above. **Create Word** **Create PDF**

<https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet>



Creates a PDF or Word to Help Gather Information



Portfolio Manager - What data is required?

LEARN MORE AT energystar.gov

In order for Portfolio Manager to calculate metrics about your property, you must provide several key pieces of information about your property's operation, in addition to your energy, water or waste data. The information required varies by the type of property and whether or not your property is eligible for an [ENERGY STAR Score](#).

Data Required for All Properties

Property Name _____

Property Address _____

Total **Gross Floor Area** of Property _____ sq ft/sq M

Irrigated Area _____ sq ft/sq M/Acres

Year Built/Planned for Construction Completion _____

Occupancy _____ %

Number of Buildings _____

Helpful Hints for All Properties

- Definitions for Property Use Details are available in the [Portfolio Manager Glossary](#) (in the Help section, or <https://portfoliomanager.energystar.gov/pm/glossary>).
- Some properties may contain multiple Property Uses within a single building (e.g. office, data center, and parking; OR K-12 School and Swimming Pool). In most cases, EPA recommends you enter as few Property Uses as possible. More information about when to enter a separate Property Use is in this FAQ.
- For properties with multiple tenants within the same property use (e.g. Office), these tenants should be entered separately only when the number of Weekly Operating Hours differs by more than 10 hours. For example, say an Office Building has a Gross Floor Area of 100,000 square foot (SF) where 75,000 SF operates 60 hours a week and 25,000 SF operates 80 hours a week. Enter these as two separate Property Uses (one 75,000 SF property and one 25,000 SF property).

Page 1 of 4 Generated On: 2/28/2017

College/University Uses

Data Collected for College/University Uses

The following information is **required** for basic metrics:

Gross Floor Area _____

Weekly Operating Hours _____

Enrollment _____

Number of Full Time Equivalent (FTE) Workers _____

Number of Computers _____

Grant Dollars _____

Definition for College/University

College/University refers to buildings used for the purpose of higher education. This includes public and private colleges and universities.

Gross Floor Area should include all space within the building(s), including classrooms, laboratories, offices, cafeterias, maintenance facilities, arts facilities, athletic facilities, residential areas, storage rooms, restrooms, elevator shafts, and stairways.

Page 2 of 4 Generated On: 4/13/2021

Meter Information

What's required to see metrics:

- 12 consecutive, complete months of bills if your energy or water is metered continuously.
- At least one delivery if your energy is delivered in bulk quantities (e.g. filling a propane tank.)

Please copy this sheet as needed to account for all meters at your property.

Basic Meter Information

Meter Name or ID _____

Meter Type (e.g. Electricity) _____

Units (e.g. kWh) _____

Date Meter Became Active _____

Date Meter Became Inactive _____

You can use the form below to get ready to enter your data so you can see metrics, however you can create your property and set up your meters without entering your meter data. You can add bills later.

Meter Bills			
Start Date/Delivery Date	End Date (leave blank for deliveries)	Usage/Quantity	Cost (optional)

Page 3 of 4 Generated On: 4/13/2021



Ready to Create a Property

ENERGY STAR® PortfolioManager®

Welcome Account | Notifications | ENERGY STAR Notifications | Contacts | Help | Sign Out

Portfolio101: Settings

MyPortfolio | Sharing | Reporting | Recognition

Properties (1)

Add a Property

Dashboard Search by ID or Name

View All Properties (1) None Refresh Metrics

[Add/Edit/Delete Groups](#) [Add/Edit/Delete Views](#)

Name
Sample Office (Canada) 15176237

First Previous Page 1 of 1 Next Last 100 View 1 - 1 of 1

Source EUI Trend (GJ/m²)

[Change Metric](#)



Create a Property

ENERGY STAR® PortfolioManager®

Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out
PortfolioID: Settings Notifications

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!

Your Property Type
We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

- Manufacturing/Industrial Plant
- Mixed Use**
- Mixed Use Property
- Office**
- Medical Office
- Veterinary Office
- Other**
- Other
- Parking**
- Parking
- Public Services**
- Courthouse
- Drinking Water Treatment & Distribution
- Fire Station
- Library
- Mailing Center/Post Office
- Police Station
- Prison/Incarceration
- Social/Meeting Hall

Tip
To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

Tip
Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.


Test Properties
You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize

1 Select your Property Type

- > About 80 Types
- > Choose the property type that represents most of your ground floor area (GFA)



Create a Property



Your Property's Buildings

How many physical buildings do you consider part of your property?

None: My property is part of a building (e.g., a Tenant Space)
 One: My property is a single building
 More than One: My property includes multiple buildings ([Campus Guidance](#))


How many?

Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

2 Your Property's Buildings

➤ Enter the Number of buildings



Your Property's Construction Status

Is your property already built or are you entering this property as a construction project that has not yet been completed?

Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.
 Design Project: My property is in the conceptual design phase (pre-construction); I will be using Portfolio Manager to evaluate the energy efficiency of the design project.
 Test Property: This is not a real property. I am entering it to test features, or for other purposes such as training.

Get Started!
Cancel

Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

3 Your Property's Construction Status

➤ The most common entry is Existing building

➤ **Design Project:** if you want to get a sense of the efficiency of your future building

➤ **Test Property:** if you want to get familiar with Portfolio Manager

4 Get Started



Set Up a Property

Year Built can be an estimate if unknown. Not used to calculate any metrics

Set Up a Property: Basic Property Information
Tell us a little bit more about your property, including a name that you will use to look up your property and its address.

About Your Property

Name:

Country:

Street Address:

City/Municipality:

County:

State/Province:

Postal Code:

Year Built:

Gross Floor Area: Temporary Value

Irrigated Area:

Occupancy: %

Property Photo (optional): Aucun fichier choisi
Select an image file on your computer with the format type of .jpg, .jpeg, .png or .gif; photos will be resized to fit a space of 2.78 inches wide x 2 inches tall.

Tip
The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

Tip
The property photo that you upload here can be used on the [Registry of ENERGY STAR Qualified Buildings](#) if you submit the photo [www-realize.com](#) for ENERGY STAR certification. Once a photo has been approved with an application, it cannot be changed until the next time that the property receives ENERGY STAR certification.

IMPORTANT! Properly calculate your GFA

The Gross Floor Area (GFA) is the total property square footage, as measured between the exterior walls of the building(s). This includes all areas inside the building(s) including supporting areas.

Include in GFA*:	Do not include in GFA**:
<ul style="list-style-type: none"> • Lobbies • Tenant Areas • Common Areas • Clubhouses • Meeting Rooms • Break Rooms • Atriums (count the base level only) • Restrooms • Elevator Shafts • Stairwells • Mechanical Equipment Areas • Basements • Storage Rooms • Laundry Rooms 	<ul style="list-style-type: none"> • Exterior spaces • Balconies • Decks • Patios • Outdoor pool decks • Exterior Loading Docks • Driveways • Covered Walkways • Outdoor Courts (Tennis, Basketball, etc.) • The interstitial plenum space between floors (which house pipes and ventilation) • Crawl Spaces • Attics • Parking

Occupancy: On average throughout the year

Not used to calculate metrics; however, there are minimum occupancy requirements to get a score



Set Up a Property - Parking

Parking

If metered separately from the building, do **NOT** check this box. If it is included (lighting, heating), then check the box.

Do any of these apply?

- My property's energy consumption includes [parking](#) areas
- My property has a [Data Center](#) that requires a constant power load of 75 kW or more
- My property has one or more retail stores ([that are eligible for a Retail score](#))
- My property has one or more restaurants/caferterias

[Back](#) [Continue](#) [Cancel](#)

i Tip

Answering these simple questions will help us guide you in entering your property correctly.

.....



Set Up a Property

Add Another Type of Use Add

Building Use [Edit Name](#)

Office refers to buildings used to conduct commercial or governmental business activities. This includes administrative and professional offices.

Gross Floor Area (GFA) should include all space within the building(s) including offices, conference rooms and auditoriums, break rooms, restrooms, kitchens, lobbies, fitness areas, basements, storage areas, stairways, and elevator shafts.

If you have restaurants, retail, or services (dry cleaners) within the Office, you should most likely include this square footage and energy in the Office Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

- If it is a [Property Use Type that can get an ENERGY STAR Score](#) (note: Retail can only get a score if it is greater than 5,000 square feet)
- If it accounts for more than 25% of the property's GFA
- If it is a vacant/unoccupied Office
- If the Hours of Operation differ by more than 10 hours from the main Property Use

[More on this rule.](#)

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	<input type="text" value="10,260"/> Sq. M. <input type="text"/>	<input type="text" value="1/1/1961"/> <input type="text"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text" value="65"/> <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1961"/> <input type="text"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text" value="254.01"/> <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1961"/> <input type="text"/>	<input type="checkbox"/>
Number of Computers	<input type="text" value="220.88"/> <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/1961"/> <input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text" value="50% or more"/> <input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1961"/> <input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text" value="50% or more"/> <input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1961"/> <input type="text"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

Back **Add Property** [Cancel](#)

Building Use

➤ Specific to the building type

➤ Values with a ★ are used to calculate your score, so they are very important and need to be accurate

➤ Default values can be used, but it is better to use the known values

➤ **Blue text** provides definitions and tips



Set Up a Property



Add Another Type of Use

Building Use / [Edit Name](#)

Office refers to buildings used to conduct commercial or governmental business activities. This includes administrative and professional offices.

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[More on this rule.](#)

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★ Weekly Operating Hours	65 <input type="text"/> <input checked="" type="checkbox"/> Use a default	1/1/1961 <input type="text"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	254.01 <input type="text"/> <input checked="" type="checkbox"/> Use a default	1/1/1961 <input type="text"/>	<input type="checkbox"/>
Number of Computers	220.88 <input type="text"/> <input checked="" type="checkbox"/> Use a default	1/1/1961 <input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	50% or more <input type="text"/> <input type="checkbox"/> Use a default	1/1/1961 <input type="text"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	50% or more <input type="text"/> <input type="checkbox"/> Use a default	1/1/1961 <input type="text"/>	<input type="checkbox"/>

★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.

Add Another Type of Use only if

- Type of Use can earn ENERGY STAR rating
- The Type of Use differs from the main property type and accounts for more than 25% of total GFA
- There is unoccupied office space – totally shutdown
- The operating hours vary significantly from the main ones

Keep as few types as possible

- If multiple tenants, no need to do separate property types. Combine the GFA and other data

KEEP IT SIMPLE!!!



From the Details Tab

Office 1

123 St-Catherine, Montréal, QC H1X2A8 | [Map It](#)

Portfolio Manager Property ID: 15490988

Year Built: 1981

[Edit](#)

Not currently eligible for ENERGY STAR Certification

Weather Normalized Source EUI (GJ/m²) Why not score?

Current: [N/A](#)

Baseline: [N/A](#)

Change Metric

Summary **Details** Energy Water Waste & Materials Goals Design

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
10,260 Sq. M.

Occupancy:
90%

[Edit](#)

Unique Identifiers (IDs)

Portfolio Manager ID:
15490988

Custom IDs: None

Standard IDs: None

You can select from Portfolio Manager's Standard IDs to provide information to others in data requests. Or you can create up to three Custom IDs so that you can cross-reference your property in other systems.

[Edit](#)

Additional Information

Property Uses and Use Details

[View as Diagram](#)

Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	10,260 m ²	I want to...
Property GFA (Buildings):		10,260 (Use to calculate EUI)	
Property GFA (Parking):		0	

To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Property GFA by Use

Office: 100%

Property Type

Property Type - Self-Selected:
Office [Edit](#)

Property Type -Portfolio Manager-Calculated:
Office

The Portfolio Manager-Calculated Property Type is used for your metrics (except for Mixed Use properties). [Learn more about property types.](#)

You Can:

- View and modify basic information
- Add another type of use



Multiple Properties with One Spreadsheet

ENERGY STAR PortfolioManager®

Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out
Portfolio101: Settings Notifications

MyPortfolio Sharing Reporting Recognition

Properties (1)
[Add a Property](#)

Source EUI Trend (GJ/m²)
[Change Metric](#)

3
2
1
0

2010 2012 2014 2016 2018 2020

(Chart current as of 03/30/2021 01:05 PM GMT-0400) [Refresh Chart](#)

Dashboard
Search by ID or Name

View All Properties (1)
[Add/Edit/Create/Stores](#)

Name
Sample Office | Canada
15176237
[First](#) [Previous](#)

Manage Portfolio

- [Transfer ownership](#) of a property that you manage to another Portfolio Manager user.
- [Upload and/or update multiple properties](#) at once using an Excel spreadsheet if you are a pro. This can be done to create new properties, add use details, create meters and add meter consumption data.
- [Download your entire portfolio to Excel](#) or create a [custom download](#).
- [Set a portfolio baseline and/or target](#) to help measure progress.
- [Add sample properties](#) to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.

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- [Add sample properties](#) to your account. Up to five sample properties with pre-populated data will be added to your portfolio for testing purposes.

To be covered in Workshop #2

Going Deeper with Energy Star Portfolio Manager:
Deriving Value from your Building Energy Data



July 25th, 2024



Entering Consumption Data

Adding consumption data (energy, water, waste, or material)



Entering Energy Data

Five Ways to Enter Bill Data

1. Manual ([Instructions here](#))
2. Use our [simple spreadsheet](#) (on the bottom of each meter's Manage Bills page) to upload or Copy/Paste
3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)
4. Hire an organization to electronically enter your data
5. See if your [utility offers this service](#)

Manual entry of bill data covered today

Spreadsheet data entry covered in Workshop #2



Entering Data - Manually

Summary Details **Energy** Water Waste & Materials Goals Design

Meter Summary

0 Energy Meters Total
In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.

[Add A Meter](#)

Current Energy Date
Not Available

[Enter Your Bills](#)

Five Ways to Enter Bill Data

1. Manual ([Instructions here](#))
2. Use our [simple spreadsheet](#) (on the bottom of each meter's Manage Bills page) to upload or Copy/Paste
3. Use our [complex spreadsheet](#) (multiple meters + multiple properties)
4. Hire an organization to electronically enter your data
5. See if your utility offers this service

Meters - Used to Compute Metrics (0)

[View as a Diagram](#)

[Add A Meter](#)

! There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. [Enter information about your energy meters](#) to begin tracking energy usage. After entering the meter, you will need to [choose to include it in your metrics](#).

For a step-by-step guide to entering meter data, see [How to get Utility Data into Portfolio Manager](#).

Your utility, , may be able to send energy data directly to this building record, using Portfolio Manager web services. [Click here](#) for additional information and to see if this option is right for you. If this is what you would like to do, you can [connect](#) with to get the process started.

1 Add Meters (elec, NG, etc.)

Get Started Setting Up Meters for Office 1

There are five ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. Fourth, you can [hire a company to update your data electronically](#). And finally, you can see if your [utility offers the service to update your energy data automatically](#).

Sources of Your Property's Energy

What kind of **energy** do you want to track? Please select all that apply.

- Electric
 - purchased from the grid
 - How Many Meters?
 - generated onsite with my own solar panels
 - generated onsite with my own wind turbines
 - Natural Gas
 - How Many Meters?
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
- District Chilled Water
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Coal (anthracite)
- Coal (bituminous)
- Coke
- Wood
- Kerosene
- Fuel Oil (No. 1)
- Other:

Tracking Energy

To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g. electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

Two Meters Needed for Onsite Solar/Wind

If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More](#).

Automate Your Meter Entries

There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. [Learn more](#).

[Get Started!](#) [Cancel](#)



Entering Data - Manually

2 Energy Meter Specifications

ENERGY STAR® Portfolio Manager®

Welcome Account | Notifications | ENERGY STAR | Contacts | Help | Sign Out
Portfolio101: Settings Notifications

About Your Meters for Office 1

Enter the information below about your new meters. The meter's **Units** and **Date Meter became Active** are required. You can also change the meter's name.

2 Energy Meters for Office 1 (click table to edit)

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?	Custom M ID 1 Name
<input type="checkbox"/>	Natural Gas	Natural Gas		cm (cubic meters)	01/01/2020	<input checked="" type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid		kWh (thousand Watt-hours)	01/15/2020	<input checked="" type="checkbox"/>		<input type="checkbox"/>	

Delete Selected Entries
 Add Another Entry

Back Create Meters Cancel

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Make sure you have the proper units



Enter the first day of the first bill you are entering in Portfolio Manager



Click if you don't have regular monthly entries (e.g. propane delivery)

You can enter main meters and submeters





Entering Data - Manually

Your Meter Entries for Office 1

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

2 Energy Meter(s) for Office 1

▼ Natural Gas

	Start Date	End Date	Usage cm (cubic meters)	Total Cost (\$)	Estimation
<input type="checkbox"/>	01/01/2020	02/01/2020	<input type="text" value="1,000"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/>	2/1/2020	3/1/2020	1,200		<input type="checkbox"/>
<input type="checkbox"/>	3/1/2020	4/1/2020	900		<input type="checkbox"/>

[Delete Selected Entries](#)
[Add Another Entry](#)
[Learn how to copy/paste](#)

Upload data in bulk for this meter:

Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

Aucun fichier choisi

► Electric Grid Meter

3 Enter Data



Doesn't need to be a calendar month. Can be adjusted to represent utility bills



Cost is optional but useful metrics are calculated (\$/m²) and can be used to compare your energy costs

You can upload your data by downloading, filling in, and uploading the single-meter spreadsheet to avoid manual entries



See Workshop #2 – July 25, 2024



Entering Data - Manually

MyPortfolio | Sharing | Reporting | Recognition

Your meter entries have been added to your meters!

Select Meters to Include in Metrics

Tell us which meters to include when calculating the metrics for [Office 1](#) so that we can provide you with the most accurate metrics possible.

Summary

1

Meters representing the energy consumption of **common areas (all energy loads)** for [Office 1](#) (a single building).

About Sub-meters

If you have sub-meters to measure energy or water consumption for a specific purpose, and you also have a master meter (which measures total consumption), counting both of those meters would double count your consumption and skew your metrics (e.g., artificially increase your Site Energy Use Intensity). [Learn More about configuring meters for performance metrics.](#)

Energy Meters

Select all meters to be included in your metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

<input type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	Natural Gas 103217059	Natural Gas
<input type="checkbox"/>	Electric Grid Meter 103217059	Electric - Grid

Total of 1 meter(s). Tell us what this represents:

* These meter(s) account for the total energy consumption for [Office 1](#) (a single building).
 These meter(s) do not account for the total energy consumption for [Office 1](#) (a single building).

These meters only account for:

* Common areas (all energy loads)
 Tenant areas (all energy loads)
 Tenant and/or common areas (partial energy loads)
 Another configuration

Apply Selections Cancel

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4

Select meters that account for the total energy consumption of the building



If you have submeters, make sure not to select them to avoid doubling your energy consumption.



Follow the same process to enter Water meter data

Summary | Details | Energy | **Water** | Waste & Materials | Goals | Design



From the Energy or Water tabs, You Can Also

Add a meter

Enter Your Bills

Change Meter Selection

Download the Graph (.JPEG, .PDF, .PNG, .SVG)

Export Data by Calendar Month

Download Annual Totals by Meter

Sample Office (Canada)
123 rue Main Street, Toronto, ON M5G1A1 | [Map It](#)
Portfolio Manager Property ID: 15176237
Year Built: 1975

Not currently eligible for ENERGY STAR Certification

ENERGY STAR Score (1-100)
Current Score: 22
Baseline Score: 28

Summary Details Energy Water Waste & Materials Goals Design

Meter Summary
2 Energy Meters Total
2 - Used to Compute Metrics
[Add A Meter](#)

Current Energy Date
Dec 31, 2018
[Enter Your Bills](#)

Five Ways to Enter Bill Data
1. Manual (Instructions here)
2. Use our simple spreadsheet (on the bottom of each meter's Manage Bills page) to upload or Copy/Paste
3. Use our complex spreadsheet (multiple meters + multiple properties)
4. Hire an organization to electronically enter your data
5. See if your utility offers this service

Meters Used to Compute Metrics (2)
[Change Meter Selection](#)
[View as a Diagram](#)

Name / Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter / Compteur électrique du rés 101595273	Electric - Grid	01/11/2019	Yes
Natural Gas / Gaz naturel 101595272	Natural Gas	12/31/2018	Yes

Your Property is: [Edit](#)
 A Single Building
 Part of a Building
 A Campus of Multiple Buildings

Energy Use by Calendar Month (Not Weather Normalized)

[Export Data by Calendar Month](#)

[Download Annual Totals by Meter](#)



Questions?

Feel free to contact me at
mpadvaiskas@bpa.ca

Stay connected with tools and resources

- Virtual one-on-one coaching: [post-webinar support intake form](#) for tailored support for organizations to manage energy resources effectively
- Monthly bulletin: [sign up](#) to receive monthly training updates on all Save on Energy training and support, new tools and resources
- [Live training calendar](#): visit this page to easily register for upcoming events and workshops
- [Training and support webpage](#): visit this page to access all published training and support materials

Thank you!

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trainingandsupport@ieso.ca



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