

**JULY 25<sup>TH</sup>, 2024**

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

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# Agenda

5/68 ● Metrics summary & editing property data

19/68 ● Use the Data Quality Checker

24/68 ● Update data using the Spreadsheet Upload feature

40/68 ● Share property data

47/68 ● Set baselines, goals, and targets to plan energy improvements

55/68 ● Create custom reporting templates

# Recap: property tabs

## Summary tab

Office 1  
123 St-Catherine, Montréal, QC H1X2A6 [Map It](#)  
Portfolio Manager Property ID: 15490988  
Year Built: 1901 [Edit](#)

[Not currently eligible for ENERGY STAR Certification](#)

**Weather Normalized Source EUI (GJ/m<sup>2</sup>)** [Why not score?](#)  
Current: [N/A](#)  
Baseline: [N/A](#)

[Change Metric](#)

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

[Refresh](#) to see **Source EUI Trend**  
[Change Metric](#)

[Change Metrics](#)  
[Change Time Periods](#)

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (GJ/m <sup>2</sup> )	Not Available	Not Available	N/A
Site EUI (GJ/m <sup>2</sup> )	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO <sub>2</sub> e/m <sup>2</sup> )	Not Available	Not Available	N/A
Water Use (All Water Sources) (m <sup>3</sup> )	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Metric Tons)	Not Available	Not Available	N/A

## Property use Details

NRCAN/RNCAN Sample Office  
123 rue Main Street, Toronto, ON M5G1A1 | [Map It](#)  
Portfolio Manager Property ID: 33176845  
Year Built: 1975 [Edit](#)

[Not currently eligible for ENERGY STAR Certification](#)

**Source EUI (GJ/m<sup>2</sup>)**  
Current: 1.09 (25.88% lower than median)  
Baseline: 1.01 (32.21% lower than median)

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

**Basic Information**  
Construction Status: Test property that is one single building  
Property GFA - Self-Reported: 40,000 Sq. M  
Occupancy: 95% [Edit](#)

**Property Uses and Use Details**  
[View as Diagram](#) | Add Another Type of Use | [Add](#)

Name	Property Use Type	Gross Floor Area	Action
<a href="#">Building Use / Utilisation du bâtiment</a>	Office	40,000 m <sup>2</sup>	<a href="#">I want to...</a>
<a href="#">Custom Use Details (Learn More)</a>			<a href="#">I want to...</a>

Property GFA (Buildings): 40,000 (used to calculate EUI)  
Property GFA (Parking): 0

[To edit multiple uses for this property \(or multiple properties\), you can use the Update Use Details spreadsheet template.](#)

**Unique Identifiers (IDs)**  
Portfolio Manager ID: 33176845  
Standard IDs: None  
Custom 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](#)

**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.](#)



# Recap: Data tab (energy + water)

Add a meter

Enter your bills

Change meter selection

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

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 Selections](#)  
[View as a Diagram](#)

Name / Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
<a href="#">Electric Grid Meter / Compteur électrique du rés</a> 101595273	Electric - Grid	01/11/2019	Yes
<a href="#">Natural Gas / Gaz naturel</a> 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)  
Site Energy (GJ)  
Sep '15 Jan '16 May '16 Sep '16 Jan '17 May '17 Sep '17 Jan '18 May '18 Sep '18  
Electric - Grid Natural Gas  
[Export Data by Calendar Month](#)

[Download Annual Totals by Meter](#)

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

Export data by calendar  
month

Download annual totals  
by meter



# Metrics summary & editing property data

Analyze progress with built in charts & updating property data or property use details



# Summary tab metrics

Office 1  
123 St-Catherine, Montréal, QC H1X2A6 | [Map It](#)  
Portfolio Manager Property ID: 15498988  
Year Built: 1961  
[Edit](#)

Not currently eligible for ENERGY STAR Certification

Weather Normalized Source EUI (GJ/m<sup>2</sup>)  
Current: [N/A](#)  
Baseline: [N/A](#)  
[Change Metric](#)

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

[Refresh](#) to see Source EUI Trend  
[Change Metric](#)

[Change Metrics](#)  
[Change Time Periods](#)

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Source EUI (GJ/m <sup>2</sup> )	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Site EUI (GJ/m <sup>2</sup> )	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Energy Cost (\$)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Total GHG Emissions Intensity (kgCO <sub>2</sub> e/m <sup>2</sup> )	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Water Use (All Water Sources) (m <sup>3</sup> )	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Total Waste (Disposed and Diverted) (Metric Tons)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A

Customize your different views:

Which of the following trend charts would you like to display?

- I don't want to see a chart
- ENERGY STAR Score
- Source EUI (GJ/m<sup>2</sup>)
- Site EUI (GJ/m<sup>2</sup>)
- Weather Normalized Site EUI (GJ/m<sup>2</sup>)
- Weather Normalized Source EUI (GJ/m<sup>2</sup>)
- Water/Wastewater Site EUI (GJ/m<sup>2</sup>PD)
- Water/Wastewater Source EUI (GJ/m<sup>2</sup>PD)
- Source Energy Use (GJ)
- Water Use (All Water Sources) (m<sup>3</sup>)
- Total Waste (Disposed and Diverted) (Metric Tons)
- Energy Cost (\$)
- Total Water Cost (All Water Sources) (\$)
- Total Waste (Disposed and Diverted) - Cost (\$)
- Total GHG Emissions (Metric Tons CO<sub>2</sub>e)
- Total GHG Emissions Intensity (kgCO<sub>2</sub>e/m<sup>2</sup>)



To get any metrics you need at least 12 consecutive months of data

# Summary tab metrics

Office 1

123 St-Catherine, Montréal, QC H1X2A6 | [Map It](#)

Portfolio Manager Property ID: 15496988

Year Built: 1961

[Edit](#)

Not currently eligible for ENERGY STAR Certification

Weather Normalized Source EUI (GJ/m<sup>2</sup>) Why not score?

Current: [N/A](#)

Baseline: [N/A](#)

[Change Metric](#)

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

[Refresh](#) to see Source EUI Trend

[Change Metric](#)

Metric	Not Available (Energy Baseline)	Not Available (Energy Current)	Change
ENERGY STAR Score (1-100)	Not Available	Not Available	N/A
Source EUI (GJ/m <sup>2</sup> )	Not Available	Not Available	N/A
Site EUI (GJ/m <sup>2</sup> )	Not Available	Not Available	N/A
Energy Cost (\$)	Not Available	Not Available	N/A
Total GHG Emissions Intensity (kgCO <sub>2</sub> e/m <sup>2</sup> )	Not Available	Not Available	N/A
Water Use (All Water Sources) (m <sup>3</sup> )	Not Available	Not Available	N/A
Total Waste (Disposed and Diverted) (Metric Tons)	Not Available	Not Available	N/A

[Change Metrics](#)

## Adjust displayed metrics:

Select Information & Metrics

Selected items: 7 of 7 maximum

- ENERGY STAR Score
- Source EUI (GJ/m<sup>2</sup>)
- Site EUI (GJ/m<sup>2</sup>)
- Energy Cost (\$)
- Total GHG Emissions Intensity (kgCO<sub>2</sub>e/m<sup>2</sup>)
- Water Use (All Water Sources) (m<sup>3</sup>)
- Total Waste (Disposed and Diverted) (Metric Tons)

[Download Full List of Information & Metrics](#)

Selected items: 7 of 7 maximum [Apply Selection](#) [Cancel](#)

Maximum 7 at a time, all metric available for download into an excel format



# Edit property – basic information

## 1 Select the property

ENERGY STAR Portfolio Manager®

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/m<sup>2</sup>)  
Change Metric

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

## 2 Edit on main page or details tab

ENERGY STAR Portfolio Manager®

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

MyPortfolio Sharing Reporting Recognition

Sample Office (Canada)  
123 rue Main Street, Toronto, ON M5G1A1 | Map It  
Portfolio Manager Property ID: 15176237

Not currently eligible for ENERGY STAR Certification

Change Metric

ENERGY STAR Score (1-100)  
Current Score: 20  
Baseline Score: 25

Summary Details Energy Water Waste & Materials Goals Design

Basic Information  
Construction Status: Test property that is one single building  
Property GFA - Self-Reported: 25,548 Sq. M.  
Occupancy: 95%

Unique Identifiers (IDs)  
Portfolio Manager ID: 15176237  
Custom IDs: None

Property Uses and Use Details  
View as Diagram | Add Another Type of Use | Add

Name	Property Use Type	Gross Floor Area	Action
Building Use / Utilisation du bâtiment	Office	20,548 m <sup>2</sup>	I want to...
Occupancy	Office	5,000 m <sup>2</sup>	I want to...

Property GFA (Buildings): 25,548 (used 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.



# Edit property – basic information

MyPortfolio | Sharing | Reporting | Recognition

## Edit Sample Office (Canada)

Address Information

Name:

Country:

Street Address:

City/Municipality:

County:

State/Province:

Postal Code:

The address can be modified but the country cannot be changed

The occupancy is NOT used to calculate any metrics

Property Details

What is the primary function of your property?

Property Type - Portfolio Manager-Calculated: Office  
Portfolio Manager considers your property to be this type based on the uses you have entered. If this type doesn't look correct to you, please [edit your use information](#).

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  
[\(Camopus Guidance\)](#)

How many?

Construction Status:  Existing  
 Design  
 Test

Year Built:

Gross Floor Area:

Gross Floor Area (GFA) is the total property floor area, measured from the outside surface of the exterior walls of the building(s). Do not including parking. [Details on what to include.](#)

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.

Additional Information

Is this property's data maintained by a Service and Product Provider?  No  
 Yes

Is this a Federal Property (owned by any country)?  No  
 Yes



# From the Details tab, you can also:

Edit Property IDs

Designate a Service and Product Provider

Delete this Property  
Note it is permanent

The screenshot shows the 'Details' tab of a software interface. It includes several sections: 'Basic Information' with fields for Construction Status, Property GFA, and Occupancy; 'Unique Identifiers (IDs)' with Portfolio Manager ID, Custom IDs, and Standard IDs; 'Additional Information' with Federal Property and Service & Product Provider; and 'Property Uses and Use Details' which contains a table of property uses and a pie chart for 'Property GFA by Use'. The table has columns for Name, Property Use Type, Gross Floor Area, and Action. The pie chart shows 'Office' at 100%. There are also sections for 'Property Type' and 'Property Notes'.

Name	Property Use Type	Gross Floor Area	Action
Building Use / Utilisation du bâtiment	Office	25,548 m <sup>2</sup>	I want to...

Property GFA (Buildings): 25,548 (used to calculate EUI)  
Property GFA (Parking): 0

Add an Additional Property Use  
If necessary

Edit Property use Details  
(e.g. number of hours or workers)



# Updating information

**Why?** To get proper *ENERGY STAR* score over time (time weighted metrics)

**When?** For Example:

- Change in vocation (e.g. office to data center)
- Change in the number of occupants (e.g. new department)
- Vacant office space (<10% of GFA)
- Significant change in operating hours (e.g. change of tenants)

Summary Details Energy Water Waste & Materials Goals Design

Basic Information  
Construction Status: Test property that is one single building  
Property GFA - Self-Reported: 25,548 Sq. M.  
Occupancy: 95% **Edit**

Property Uses and Use Details  
[View as Diagram](#) Add Another Type of Use Add

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use / Utilisation du bâtiment	Office	25,548 m <sup>2</sup>	I want to...
Property GFA (Buildings): 25,548 (used 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 Uses and Use Details  
[View as Diagram](#) Add Another Type of Use Add

Name	Property Use Type	Gross Floor Area	Action
▼ Building Use / Utilisation du bâtiment	Office	25,548 m <sup>2</sup>	I want to...
Value Current As Of Temporary Value?			
★ Gross Floor Area		25548 m <sup>2</sup>	01/01/1975 No
★ Weekly Operating Hours		60	01/01/1975 No
★ Number of Workers on Main Shift		650	01/01/1975 No
Number of Computers		710	01/01/1975 No
★ Percent That Can Be Heated		50 % or more	01/01/1975 No
★ Percent That Can Be Cooled		50 % or more	01/01/1975 No
★ This Use Detail is used to calculate the 1-100 ENERGY STAR Score.			
Property GFA (Buildings):		25,548	(used 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.



# Correct or update property use details

Summary Details Energy Water Waste & Materials Goals Design

**Basic Information**  
Construction Status:  
Test property that is one single building  
Property GFA - Self-Reported:  
40,000 Sq. M.  
Occupancy:  
95% [Edit](#)

**Unique Identifiers (IDs)**  
Portfolio Manager ID:  
33176845  
Standard IDs:  
None  
Custom 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](#)

**Property Uses and Use Details**  
[View as Diagram](#) Add Another Type of Use [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▼ Building Use / Utilisation du bâtiment	Office	40,000 m <sup>2</sup>	<div style="border: 1px solid orange; padding: 2px;">I want to... I want to... Edit Use Details</div>
★ Gross Floor Area		40000 m <sup>2</sup>	01/01/1975 No
★ Weekly Operating Hours		60	01/01/1975 No
★ Number of Workers on Main Shift		700	01/01/1975 No
★ Percent That Can Be Cooled		50 % or more	01/01/1975 No
★ Percent That Can Be Heated		50 % or more	01/01/1975 No
Number of Computers		750	01/01/1975 No

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

[Custom Use Details](#) (Learn More) I want to... ▼

Property GFA (Buildings): 40,000 (used to calculate EUJ)  
Property GFA (Parking): 0

To change or update any information

★ Number of Workers on Main Shift

<input type="checkbox"/> Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/> 01/01/1975  (to present)	650	<input type="checkbox"/>	Stéphanie Mayer	04/19/2021

✖ Delete Selected Entries

Number of Computers

<input type="checkbox"/> Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/> 01/01/1975  (to present)	710	<input type="checkbox"/>	Stéphanie Mayer	04/19/2021

✖ Delete Selected Entries

★ Percent That Can Be Heated

<input type="checkbox"/> Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/> 01/01/1975  (to present)	50 % or more	<input type="checkbox"/>	Stéphanie Mayer	04/19/2021

✖ Delete Selected Entries

★ Percent That Can Be Cooled

<input type="checkbox"/> Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input type="checkbox"/> 01/01/1975  (to present)	50 % or more	<input type="checkbox"/>	Stéphanie Mayer	04/19/2021

✖ Delete Selected Entries

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

[Save Corrections](#) [Cancel](#)



# Correct or update Property Use Details

**Double Click** to change a value that was entered by error - No historical record of the old value will be kept or factored into your metrics

★Gross Floor Area					
<input checked="" type="checkbox"/>	Current As Of	Value	Temporary Value?	Revised By	Revised Date
<input checked="" type="checkbox"/>	01/01/1975	40000	Sq. M. <input type="checkbox"/>	Megan Padvaiskas	03/12/2024
<a href="#">+ Add a New Row</a> to update with new information (to correct mistakes click the value above that you want to correct and make necessary edits)					
<a href="#">✖ Delete Selected Entries</a>					

To update/track a value that changes over time - so that the tool can account for this when calculating time-weighted metrics



# Reminder - Add a Property Use to your building if:

## Add Property Use For NRCAN/RNCAN Sample Office

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 but not limited to 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.](#)

Name:

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	<input type="text"/> Sq. Ft. ▾	<input type="text" value="1/1/1975"/> 📅	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1975"/> 📅	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1975"/> 📅	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text" value="1/1/1975"/> 📅	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text" value="1/1/1975"/> 📅	<input type="checkbox"/>
Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/1975"/> 📅	<input type="checkbox"/>

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

You have the reminder each time you want to add a new property type



# Example: if a part of the office becomes vacant

## 1 Add Another Type of Use

Summary Details Energy Water Waste & Materials Goals Design

Basic Information  
Construction Status: Test property that is one single building  
Property GFA - Self-Reported: 25,548 Sq. M.  
Occupancy: 95%

Property Uses and Use Details  
View as Diagram

Name  
Building Use / Utilisation du bâtiment  
Vacant Space

Add Another Type of Use  
Other  
Manufacturing/Industrial  
Mixed Use  
Mixed Use Property  
Office  
Medical Office  
Office  
Veterinary Office  
Other  
Other  
Parking  
Parking  
Public Services  
Courthouse  
Drinking Water Treatment & Distribution  
Fire Station  
Library  
Mailing Center/Post Office  
Police Station

Property Type - Self-Selected: Office  
Property Type -Portfolio Manager-Calculated: Office

## 2 Rename it – easily identifiable

## 3 Save Use to save the modification

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% from the main Property Use

[More on this rule.](#)

Name: Vacant Space

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	0 Sq. M.	1/1/1975	<input type="checkbox"/>
★ Weekly Operating Hours	0 <input type="checkbox"/> Use a default	1/1/1975	<input type="checkbox"/>
★ Number of Workers on Main Shift	0 <input type="checkbox"/> Use a default	1/1/1975	<input type="checkbox"/>
Number of Computers	0 <input type="checkbox"/> Use a default	1/1/1975	<input type="checkbox"/>
★ Percent That Can Be Heated	50 % or more <input type="checkbox"/> Use a default	1/1/1975	<input type="checkbox"/>
★ Percent That Can Be Cooled	50 % or more <input type="checkbox"/> Use a default	1/1/1975	<input type="checkbox"/>

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

Save Use Cancel



# Example: modify Property Uses and Use Details

4a

## Update information – vacant space

Update Property Use Details

It is important to keep the information about how your property is used up to date since this information is used to calculate your performance metrics. Updates that you make here are tracked as part of the [History Log](#). To correct an error that you find, use the [History Log](#). Note: you do not need to provide any new information for details you aren't updating.

Property Use Name:  ←

Type of Use: [Office](#)

Detail	Current Value	Updated Value	Current As Of	Temporary Value
★ Gross Floor Area	0 Sq. M. (as of 01/01/1975)	<input type="text" value="5,000"/> Sq. M. ▾	<input type="text" value="01/01/2021"/> 📅	<input type="checkbox"/>
★ Weekly Operating Hours	0 (as of 01/01/1975)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/> 📅	<input type="checkbox"/>
★ Number of Workers on Main Shift	0 (as of 01/01/1975)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/> 📅	<input type="checkbox"/>
Number of Computers	0 (as of 01/01/1975)	<input type="text"/> <input type="checkbox"/> Use a default	<input type="text"/> 📅	<input type="checkbox"/>
★ Percent That Can Be Heated	50 % or more (as of 01/01/1975)	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text"/> 📅	<input type="checkbox"/>
★ Percent That Can Be Cooled	50 % or more (as of 01/01/1975)	<input type="text"/> ▾ <input type="checkbox"/> Use a default	<input type="text"/> 📅	<input type="checkbox"/>

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

📌 If your property has more than one building, you need to update your Property Use Details (# Workers, Weekly Operating Hours of operation) for both the parent property (campus) and the child properties. It is not done automatically. [Learn more about keeping Use Details up to date](#)

Date when the change occurred





# Example: Modify Property Uses and Use Details

4b

## Update information – Office space

Update Property Use Details

It is important to keep the information about how your property is used up to date since this information is used to calculate your performance metrics. Updates that you make here are tracked as part of the [History Log](#). To correct an error that you find, use the [History Log](#). Note: you do not need to provide any new information for details you aren't updating.

Property Use Name:

Type of Use:

Detail	Current Value	Updated Value	Current As Of	Temporary Value
★ Gross Floor Area	20548 Sq. M. (as of 01/01/2021)	<input type="text" value="20548"/> Sq. M. <input type="text" value=""/>	01/01/2021 <input type="text" value=""/>	<input type="checkbox"/>
★ Weekly Operating Hours	60 (as of 01/01/1975)	<input type="text" value=""/> <input type="checkbox"/> Use a default	<input type="text" value=""/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	600 (as of 01/01/2021)	<input type="text" value="600"/> <input type="checkbox"/> Use a default	01/01/2021 <input type="text" value=""/>	<input type="checkbox"/>
Number of Computers	650 (as of 01/01/2021)	<input type="text" value="650"/> <input type="checkbox"/> Use a default	01/01/2021 <input type="text" value=""/>	<input type="checkbox"/>
★ Percent That Can Be Heated	50 % or more (as of 01/01/1975)	<input type="text" value=""/> <input type="checkbox"/> Use a default	<input type="text" value=""/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	50 % or more (as of 01/01/1975)	<input type="text" value=""/> <input type="checkbox"/> Use a default	<input type="text" value=""/>	<input type="checkbox"/>

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

ⓘ If your property has more than one building, you need to update your Property Use Details (# Workers, Weekly Operating Hours of operation) for both the parent property (campus) and the child properties. It is not done automatically. [Learn more about keeping Use Details up to date](#)

Area change (be careful of units!):

$$25,548 \text{ m}^2 - 5,000 \text{ m}^2 = 20,548 \text{ m}^2$$

Make sure the date is identical to the vacant space (when the change in vocation happened)



# Important

Ensure the values for Property Gross Floor Area (GFA) **match**

Sample Office (Canada)

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

Not currently eligible for ENERGY STAR Certification

ENERGY STAR Score (1-100)  
Current Score: 20  
Baseline Score: 25

Summary Details Energy Water Waste & Materials Goals Design

Basic Information

Construction Status:  
Test property that is one single building

Property GFA - Self-Reported:  
25,548 Sq. M. [Edit](#)

Occupancy:  
95%

Unique Identifiers (IDs)

Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use  [Add](#)

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use / Utilisation du bâtiment	Office	20,548 m <sup>2</sup>	I want to... ▼
▶ Vacant Space	Office	5,000 m <sup>2</sup>	I want to... ▼
Property GFA (Buildings):		25,548 (used to calculate EUI)	
Property GFA (Parking):		0	



# Use the Data Quality Checker

Understanding ESPM's built in data quality checker and alerts



# Data Quality Checker

- If you see **!** it indicates that there is a potential issue with your data
- Example 1:**

**Incomplete Data- Please Review**

**!** Gross Floor Area Mismatch (Self-Reported vs. Portfolio Manager-Calculated)

**Problem:** The total **Gross Floor Area (GFA)** that you entered for your property does not match the total calculated by summing up the GFA for each Property Use.

- Total Entered for Property: 25,548 sq. m.
- Total for Uses: 24,430 sq. m.

**What to do:**

- If the GFA for some of your Property Uses doesn't look right, it might be because it's **time-weighted**.
- If the Calculated GFA doesn't look right, it might be because you changed the GFA of one Property Use, but didn't change the GFA of another Property Use on the same day, in the same amount. Please search our [FAQ page](#) for this FAQ: "I'm getting a GFA alert. Help!"
- **Correct the total for the property** or correct your Property Uses by clicking on their names from the **Details** tab. Please search our [FAQ page](#) for this FAQ: "What GFA's are tracked for my property? How do I edit them?" to learn more about these two types of GFA.

**Close Explanation**

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



# Data Quality Checker

## > Example 2:

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

Meter Summary  
4 Energy Meters Total  
4 - Used to Compute Metrics  
[Add A Meter](#)  
Current Energy Date  
Dec 31, 2019  
[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

Your Property is: [Edit](#)

- A Single Building
- Part of a Building
- A Campus of Multiple Buildings

You Are Tracking: [Edit](#)

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

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
<b>! Main CH</b> 103346859	District Chilled Water - Electric	04/01/2020	Yes
<a href="#">Main Electric</a> 103346856	Electric - Grid	04/01/2020	Yes
<a href="#">Main Gas</a> 103346857	Natural Gas	04/01/2020	Yes
<a href="#">Main HW</a> 103346858	District Hot Water	04/01/2020	Yes

[Download Annual Totals by Meter](#)

Incomplete Data- Please Review

**! Meter(s) with overlaps in meter entries.**

**Problem:** There are meter entries that overlap by 2 or more days for the following meter(s):

- [Main CH](#) (overlapping data for 01/02/2020 - 01/10/2020)

**What to do:**

- Click on the meter(s) above to view your meter entries and locate the overlaps, which will be highlighted in yellow.
- Consult your records and correct the overlaps. If you are unsure how to correct the overlaps, please search our [FAQ page](#) for more information.

Follow the path and **correct the error**. Portfolio Manager won't correct the issue on its own

<input type="checkbox"/>	11/1/2019	12/1/2019	0	<input type="checkbox"/>	4/14/2021 Data Import
<input type="checkbox"/>	12/1/2019	1/10/2020	0	<input type="checkbox"/>	4/19/2021 Portfolio101
<p><b>! Main CH has an overlap of 10 days between 01/01/2020 and 01/10/2020. 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 <a href="#">this FAQ</a>.</b></p>					
<input type="checkbox"/>	1/1/2020	2/1/2020	0	<input type="checkbox"/>	4/14/2021 Data Import
<input type="checkbox"/>	2/1/2020	3/1/2020	0	<input type="checkbox"/>	4/14/2021 Data Import
<input type="checkbox"/>	3/1/2020	4/1/2020	0	<input type="checkbox"/>	4/14/2021 Data Import



# Data Quality Checker - tool

This feature reviews all entries for an individual property for a 12-month period

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

**Site EUI Trend** (GJ/m<sup>2</sup>)  
[Change Metric](#)

(Chart current as of 04/13/2021 11:21 AM GMT-0400) [Refresh Chart](#)

**Metrics Summary**

Metric	Dec 2016 (Energy Baseline)	Dec 2018 (Energy Current)	Change
ENERGY STAR Score (1-100)	25	20	-5.00 (-20.00%)
Source EUI (GJ/m <sup>2</sup> )	2.01	2.15	0.14 (7.00%)
Site EUI (GJ/m <sup>2</sup> )	1.19	1.28	0.09 (7.60%)
Energy Cost (\$)	525,265.46	562,528.11	37,262.65 (7.10%)
Total GHG Emissions Intensity (kgCO <sub>2</sub> e/m <sup>2</sup> )	21.3	23.4	2.10 (9.90%)
Water Use (All Water Sources) (m <sup>3</sup> )	12,698.6	13,062.2	363.60 (2.90%)
Total Waste (Disposed and Diverted) (Metric Tons)	729.42	780.96	51.54 (7.10%)

**Data Quality Checker**

Run a check for any 12-month time period to see if there are any possible errors found with your data.

[Check for Possible Errors](#)



# Data Quality Checker - tool

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## Data Quality Checker for [Sample Office \(Canada\) - Vacant space](#)

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your year of interest, review your alerts, and follow the links to view or correct your data as needed.

### Select Timeframe & Run Checker

We check data for a full year (12 months) of meter consumption and Property Use Details (called a **Metric Year**). Select a **Year Ending Date** and click "run checker" to see possible data issues.

Year Ending:

### About Timeframes

The Data Quality Checker needs one full calendar year of **Property Use Details** and **meter** information for most checks. Otherwise, we will show you basic alerts to let you know what's missing.

Congratulations! We did not find any incomplete or unusual data for the Metric Year ending 12/31/2018.

12-month end date

### About Alerts

- Indicates data is incomplete or missing. Most likely at least some metrics are not able to be calculated as a result. Issue should be resolved as soon as possible.
- Indicates data is atypical for the type of property and its associated use. Data should be checked for errors to ensure metrics are correct for the property.



# Update data using the Spreadsheet Upload feature

Using the Spreadsheet Upload feature to enter information for one or more properties



# Update data using the Spreadsheet Upload feature

**This process serves to create multiple properties with one spreadsheet**

1

- Create property records

2

- Create meters

3

- Add consumption to meters

4

- Edit basic property information

5

- Update property use details

# Upload and/or update multiple properties

**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  
View All Properties (1)  
Add/Edit/Delete/Archive

Name
Sample Office / Cat 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.

Source EUI Trend (GJ/m<sup>2</sup>)  
Change Metric

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

### 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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## 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 them using a spreadsheet rather than [entering each property 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 it in the box below.
- Edit/Upload my existing properties** - To do this, you will need to tell us which properties 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.

[Add Properties Template](#)

### Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template:

Select "Browse" to locate the file on your computer and then select "Upload."

**This is a powerful feature. There is no "Undo."** Be careful!

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter. Please test this feature with only a few properties first.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

[Close](#)

### Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal Information (if applicable).

[Add Properties Template](#)

### Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

# To create new property(ies)

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## 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 them using a spreadsheet rather than [entering each property 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 it in the box below.
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Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

1 Download the spreadsheet and save it to your desktop

2 Carefully read the information in the **Instructions** tab to avoid improper entry errors

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1																	
2							<b>Add New Properties - Upload Template</b>										
3							This upload template will create new properties. This is just step one in setting up your properties. If you want to set up your properties entirely using spreadsheet uploads, you need to also "Add Meters to Existing Properties," "Add Meter Bills to Existing Meters," and "Add Use Details."										
4							<b>Instructions:</b>										
5							1. Explanations for many column headers are available by clicking in that column.										
6							2. Numeric values should NOT include any formulas or formatting such as commas (2,000 -> 2000) or dollar signs (\$100 -> 100).										
7							3. Items with pre-defined options (drop-down menu within cell when clicked) must use a value from the list. For best results, select the option from the list, rather than typing it in.										
8							4. Do not edit anything that has a grey background.										
9							5. You must fill in the <b>Properties</b> tab. The rest of the tabs are optional, or conditionally optional. If you are filling out any other tabs, you must copy the <b>Property Names</b> EXACTLY as you have entered them on the <b>Properties</b> tab.										
10							6. Fill in the Parking tab if you are not sub-metering your parking (More: <a href="http://portfoliomanager.supportportal.com/link/portal/23002/23010/Article/34499/What-is-the-best-way-to-benchmark-parking">http://portfoliomanager.supportportal.com/link/portal/23002/23010/Article/34499/What-is-the-best-way-to-benchmark-parking</a> )										
11							7. If you have multiple <b>Property Uses</b> in your building (ex: Office and Retail), you can enter each Property Use on a separate row in the <b>Uses</b> tab. You can enter as many rows as you need in order to accurately represent your property. However, EPA recommends you enter as few Property Uses as possible. See this FAQ for more information: <a href="http://portfoliomanager.supportportal.com/cs/support/kbanswer.asp?deptID=23010&amp;task=knowledge&amp;questionID=35540">http://portfoliomanager.supportportal.com/cs/support/kbanswer.asp?deptID=23010&amp;task=knowledge&amp;questionID=35540</a>										
12							8. Double check your data before uploading it. <b>There is no "undo" function!</b>										
13							<input type="button" value="Instructions"/> <input type="button" value="Properties"/> <input type="button" value="US or CA Federal Property Info"/> <input type="button" value="Property IDs"/> <input type="button" value="Uses"/> <input type="button" value="Parking"/> <input type="button" value="Swimming Pool"/> <input type="button" value="Wastewater Treatment Plant"/>										




# Properties: fill in the spreadsheet - tips

- Make sure to use the drop-down menu when available
- Do not make any changes to the format of the spreadsheet to avoid upload problems
- When filling in the fields, note that **numeric values should not include any formulas or formatting**

	A	B	C	D	E	F	G
1	Property Name (Required)	Street Address (Required)	Street Address 2 (Optional)	City/Municipality (Required)	County (Optional)	State/Province (Required for US or Canada)	Other State/Province (Required for US-or-Canada)
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							

	C	D	E	F	G	H	I
1	Street Address 2 (Optional)	City/Municipality (Required)	County (Optional)	State/Province (Required for US or Canada)	Other State/Province (Required for Non-US-or-Canada)	Postal Code (Required)	Country (Required)
2				QC			
3				QC			
4				RI			
5				SC			
6				SD			
7				SK			
8				TN			
9				TX			

 CA = California NOT Canada.  
Enter the province

# Properties: fill in the spreadsheet - tips

- The Property ID is **not required** but it is a good practice

You can record your EWRB ID here

	A	B	C	M	P	U	AG	AR	AX	
1	Property Name (Required if you want to add Property IDs)	Custom ID 1 Name (Required if you want to add one Custom ID)	Custom ID 1 Value (Required if you want to add one Custom ID)	BOMA BEST Building ID	British Columbia Building Benchmark BC ID	CoStar Property ID	LEED Canada Project ID	Ontario EWRB ID	REALPac Energy Benchmarking Program Building Name	Sal Bu
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										

Instructions | Properties | US or CA Federal Property Info | **Property IDs** | Uses | Parking | Swimming Pool | Wastewater Treatment Plant | +

# Properties: fill in the spreadsheet - tips

- **Parking:** If it is submetered, exclude the parking energy and GFA from the total energy and GFA of the building. If you CANNOT, fill in the Parking tab.

Make sure to select the right parking type and don't forget to fill all parking types with 0 if not applicable

	A	B	D	E		G	H		J	K	
	Property Name (Required)	Use Name (Required)	Open Parking Lot Size (Required)	Open Parking Lot Units (Required) Sq. M.	Open Parking Lot Temporary Value? (Y/N) (Required)	Partially Enclosed Parking Garage Size (Required)	Partially Enclosed Parking Garage Units (Required) Sq. M.	Partially Enclosed Parking Garage Temporary Value (Y/N) (Required)	Completely Enclosed Parking Garage Size (Required)	Completely Enclosed Parking Garage Units (Required) Sq. M.	Completely Enclosed Parking Garage Temporary Value (Y/N) (Required)
1											
2	Sample Office 1	Parking lot 1	100	Sq. M.	No	0	Sq. M.	No	0	Sq. M.	No
3											
4											
5											
6											
7											

Instructions   Properties   US or CA Federal Property Info   Property IDs   Uses   **Parking**   Swimming Pool   Wastewater Treatment Plant

# Before uploading... Double check your information



## THERE IS NO UNDO FUNCTION

Changes must be made manually, or the property deleted and re-uploaded



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### 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 them using a spreadsheet rather than [entering each property 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 it in the box below.
- Edit/Upload my existing properties** - To do this, you will need to tell us which properties 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.

Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#), which requires basic property information, including name, address, gross floor area, Property IDs, and Federal information (if applicable).

[Add Properties Template](#)

Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload: **Add New Properties**

Upload Template: [Choisir un fichier](#) | [Aucun fichier choisi](#) | [Upload](#)

Select "Browse" to locate the file on your computer and then select "Upload."

**! This is a powerful feature. There is no "Undo." Be careful!**

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter. Please test this feature with only a few properties first.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

Edit and Manage Information

Once your properties are in Portfolio Manager, you can [edit](#) and update them using a [template](#) customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

### Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

**Add New Properties**

Upload Template:

[Choisir un fichier](#) | [Aucun fichier choisi](#) | [Upload](#)

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- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

# Properties: uploading errors

## 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 them using a [spreadsheet](#) or adding bills manually. Learn more below.

### My Spreadsheet Uploads

The following spreadsheets have been uploaded to Portfolio Manager. Depending on the size of your spreadsheet, completing the upload to your portfolio may take a while.

<input type="checkbox"/>	File Name	Type of Upload	Date	Status
<input type="checkbox"/>	8018-001-3019-PortfolioManager.xlsx	New Property	4/14/2021 9:29 AM	Success
<input type="checkbox"/>	8018-001-3019-PortfolioManager.xlsx	New Property	4/14/2021 9:25 AM	Failed <a href="#">View Errors</a>
<input type="checkbox"/>	8018-001-3019-PortfolioManager.xlsx	New Property	4/14/2021 9:19 AM	Failed <a href="#">View Errors</a>

[Delete Selected Entries](#)

If your spreadsheet **fails** to upload, the entire spreadsheet **fails** so when you upload it again there is no duplicate.

### Spreadsheet Upload Failure: 8018-001-3019-PortfolioManager.xlsx

Any errors cause the entire upload to fail. **No changes have been made in Portfolio Manager** based on this spreadsheet.

**Date:** 4/14/2021  
**File Name:** 8018-001-3019-PortfolioManager.xlsx  
**Result:** Failed

#### Errors with your Upload

- Office Ottawa**  
Please enter the square footage, units and temporary flag for partially enclosed parking on sheet: 'Parking' at row 2.
- Office Ottawa**  
Please enter the square footage, units and temporary flag for completely enclosed parking.

#### Understanding Errors

There were errors with your spreadsheet upload that prevented it from being uploaded. Please correct the errors and try uploading it again. You may want to review the "Upload Tips" tab in the spreadsheet.

Once you have resolved these errors in your spreadsheet, you will need to [upload it again](#).

[Close](#)



# Creating multiple meters

Once you've created a new property  
> (or properties) **create a custom upload template**

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### 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 them using a spreadsheet rather than [entering each property 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 it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties 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.

#### Add Properties

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#) which requires basic property information, including name, address, gross floor area, Property IDs, and Federal information (if applicable).

[Add Properties Template](#)

#### Upload Spreadsheets

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template:  Aucun fichier choisi

Select "Drivers" to locate the file on your computer and then select "Upload".

**This is a powerful feature. There is no "Undo." Be careful!**

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter. Please test this feature with only a few properties first.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

#### Edit and Manage Information

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

## Create a Custom Upload Template

If you want to add property use or meter information for multiple properties, you can do this by using an Excel spreadsheet. First tell us some information about what you are trying to upload to Portfolio Manager so we can create a spreadsheet template for you to use. Then simply fill it in with your information and upload it!

### 1 Select the Task You are Performing

- Add Meters to Existing Properties
  - Add Bills to Existing Meters (i.e., meter consumption information)
  - Update Use Details for Existing Properties (e.g. Weekly Hours of Operation, Number of Workers, etc.)
  - Edit Basic Property Information for Existing Properties (such as name and address)

### Warning - Don't Change Columns!

In order for your upload to work you cannot Add, Delete or Re-Order columns in the custom spreadsheet. We create the template based on your data, and we need a specific format in order for your upload to succeed.

### 2 Select Properties to Include

Properties:

### Creating New Properties?

If you need to add new properties, you do not need to create a custom upload template. You can add new properties [manually](#) or by using the [Add Property Excel Template](#).

### 3 Select Detailed Information to Include

Meter Types:

- Energy Meters**
  - Electric
    - purchased from the grid
      - How many meters (per property)?
    - generated on site with my own solar panels
    - generated on site with my own wind turbines
  - Natural Gas
    - How many meters (per property)?
  - Propane
  - Fuel Oil (No. 2)
  - Diesel
  - District Steam
  - District Hot Water
    - How many meters (per property)?
  - District Chilled Water
    - District Chilled Water - Absorption
    - District Chilled Water - Electric
      - How many meters (per property)?
    - District Chilled Water - Engine
    - District Chilled Water - Other
  - Fuel Oil (No. 4)
  - Fuel Oil (No. 5 and No. 6)
  - Coal (anthracite)
  - Coal (bituminous)
  - Coke
  - Wood
  - Kerosene
  - Fuel Oil (No. 1)
  - Other:

### Selecting Details

The choices provided here correspond to the properties you have selected in Step 2. If you don't see what you are looking for, take a look at the property and make sure that the use or meter types are set up.

### Water Meters

- Municipally Supplied Potable Water
  - Indoor
    - How many meters (per property)?
  - Outdoor
  - Mixed Indoor/Outdoor
  - Municipally Supplied Reclaimed Water
  - Well Water
  - Other:

### Waste and Materials Meters

- Disposed Waste and Materials
- Recycled Waste and Materials
- Donated/Reused Waste and Materials
- Composted Waste and Materials

[Create & Download Template](#)

# Creating multiple meters

Once you've created a new property  
> (or properties) **create a custom meter upload template**

**What do you want to upload?**

- **Add new properties to my account** - To get started, fill in [this spreadsheet](#) and upload it in the box below.
- **Edit/Upload my existing properties** - To do this, you will need to tell us which properties 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.

**Add Properties**

You can create new properties in Portfolio Manager, by filling in [this spreadsheet](#) which requires basic property information, including name, address, gross floor area, Property IDs, and Federal information (if applicable).

[Add Properties Template](#)

**Upload Spreadsheets**

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template:  Aucun fichier choisi

Select "Drivers" to locate the file on your computer and then select "Upload".

**This is a powerful feature. There is no "Undo." Be careful!**

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter. Please test this feature with only a few properties first.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

**Edit and Manage Information**

Once your properties are in Portfolio Manager, you can edit and update them using a template customized based on what you want to do. For example, you may want to upload energy bill data for multiple properties or update use information.

[Create an Upload Template](#)

## Create a Custom Upload Template

If you want to add property use or meter information for multiple properties, you can do this by using an Excel spreadsheet. First tell us some information about what you are trying to upload to Portfolio Manager so we can create a spreadsheet template for you to use. Then simply fill it in with your information and upload it!

### 1 Select the Task You are Performing

- Add Meters to Existing Properties
  - Add Bills to Existing Meters (i.e., meter consumption information)
  - Update [Use Details](#) for Existing Properties (e.g. Weekly Hours of Operation, Number of Workers, etc.)
  - Edit Basic Property Information for Existing Properties (such as name and address)

### Warning - Don't Change Columns!

In order for your upload to work you cannot Add, Delete or Re-Order columns in the custom spreadsheet. We create the template based on your data, and we need a specific format in order for your upload to succeed.

### 2 Select Properties to Include

Properties:

### Creating New Properties?

If you need to add new properties, you do not need to create a custom upload template. You can add new properties [manually](#) or by using the [Add Property Excel Template](#).

### 3 Select Detailed Information to Include

Meter Types:

#### Energy Meters

- Electric
  - purchased from the grid
    - How many meters (per property)?
  - generated on site with my own solar panels
  - generated on site with my own wind turbines
- Natural Gas
  - How many meters (per property)?
- Propane
- Fuel Oil (No. 2)
- Diesel
- District Steam
- District Hot Water
  - How many meters (per property)?
- District Chilled Water
  - District Chilled Water - Absorption
  - District Chilled Water - Electric
    - How many meters (per property)?
  - District Chilled Water - Engine
  - District Chilled Water - Other
- Fuel Oil (No. 4)
- Fuel Oil (No. 5 and No. 6)
- Coal (anthracite)
- Coal (bituminous)
- Coke
- Wood
- Kerosene
- Fuel Oil (No. 1)
- Other:

#### Water Meters

- Municipally Supplied Potable Water
  - Indoor
    - How many meters (per property)?
  - Outdoor
  - Mixed Indoor/Outdoor
  - Municipally Supplied Reclaimed Water
  - Well Water
  - Other:

#### Waste and Materials Meters

- Disposed Waste and Materials
- Recycled Waste and Materials
- Donated/Reused Waste and Materials
- Composted Waste and Materials

[Create & Download Template](#)



# Adding meters – spreadsheet tips

- 1 A custom spreadsheet is created based on selected items – DO NOT add or remove a column
- 2 Download the spreadsheet and save on your desktop
- 3 Carefully read the Instructions tab to avoid improper entry errors
- 4 Fill in the spreadsheet
- 5 Upload to Portfolio Manager

**Date Meter Became Active**  
 The Date of the very first bill for this meter (when the meter was installed or became active).  
  
 Use either DD-MM-YYYY or MM-DD-YYYY, to match your Operating System's date setting.

**Bulk or Metered?**  
 At least one of your meters can be entered as a bulk delivery (like Propane).  
  
 Indicate for each meter if you want to enter your bills as a "Bulk" delivery with a delivery date, or "Metered" with a Start and End date.

**Include in Property Metrics?**  
 Most meters should be included in your Property Metrics (Score, EUI, etc.). Sub-meters are an example of what you would not include in your property metrics.

	A	B	C	E	F	G	H	I	J	K	L
	Portfolio Manager ID (Pre-filled)	Property Name (Pre-filled)	Meter Type (Pre-filled)	Meter Name (Required)	Units (Required)	Date Meter Became Active (Required)	In Use? (Required)	Date Meter Became Inactive (Required, if Meter NOT In Use)	Bulk or Metered? (Required)	Include in Property Metrics? (Required)	Custom Meter ID Name (Required if you want to add one Custom ID)
1											
2	15526843	Office Ottawa	Electric - Grid	Main Electric	kWh (thousand W)	01-11-2017	Yes		Metered	Yes	
3	15526843	Office Ottawa	Natural Gas	Main Gas	cm (cubic meters)	01-11-2017	Yes		Metered	Yes	
4	15526843	Office Ottawa	District Hot Water	Main HW	GJ	01-11-2017	Yes		Metered	Yes	
5	15526843	Office Ottawa	District Chilled Water - Electric	Main CH	GJ	01-11-2017	Yes		Metered	Yes	
6											
7											

# Adding multiple bills

➤ Once you've created the meters create a custom bill upload template

The screenshot shows the 'Upload and/or Update Multiple Properties' page. It has a navigation bar with 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main heading is 'Upload and/or Update Multiple Properties'. Below the heading is a sub-heading 'Upload Spreadsheets' and a paragraph explaining that users can upload a spreadsheet instead of entering data manually. There are three main sections: 'What do you want to upload?' with two bullet points about adding new properties or updating existing ones; 'Add Properties' with a paragraph about creating new properties and an 'Add Properties Template' button; and 'Upload Spreadsheets' with a 'Type of Upload' dropdown, an 'Upload Template' section with a file picker, and a 'Create an Upload Template' button highlighted with an orange box. A warning icon and text are also present in the 'Upload Spreadsheets' section.

The screenshot shows the 'Create a Custom Upload Template' page. It has a navigation bar with 'MyPortfolio', 'Sharing', 'Reporting', and 'Recognition'. The main heading is 'Create a Custom Upload Template'. Below the heading is a paragraph explaining that users can create a custom spreadsheet template for uploading multiple properties. There are three main sections: '1 Select the Task You are Performing' with three radio button options, where 'Add Bills to Existing Meters (i.e., meter consumption information)' is selected and highlighted with an orange arrow; '2 Select Properties to Include' with a 'Properties' dropdown set to 'One Property' and a location dropdown set to 'Office Ottawa'; and '3 Select Detailed Information to Include' with two sections: 'Energy Meter Types' and 'Water Meter Types'. Both sections have several checked options and input fields for 'How many bills for this type of meter (per property)?' with the value '29' entered. A 'Create & Download Template' button is highlighted with an orange box, and a 'Cancel' button is also visible. On the right side, there are three warning icons with text: 'Warning - Don't Change Columns!', 'Creating New Properties?', and 'Selecting Details'.



# Add bills – spreadsheet tips

**Add Bills to Existing Meters - Upload Template**

This upload template will update your properties' meters with new bills.

**Instructions:**

1. Some information has been provided for you on each tab (shown in italics, with a gray background.) This data is provided only as a reference. Do not edit anything with a gray background. If you see something that is incorrect, you need to fix it in Portfolio Manager.
2. You will see a tab corresponding to each meter type that you chose to update when creating this template.
3. Explanations for many column headers are available by clicking in that column.
4. Items with pre-defined options (drop-down menu within cell when clicked) must use a value from the list. For best results, select the option from the list, rather than typing it in.
5. Double check your data *before uploading it. There is no "un-do" function!*

**Uploading Instructions:**

1. When you have completed your spreadsheet, save it to your computer.
2. Click the link at the bottom of the MyPortfolio page to "Upload and/or Update Multiple Properties".
3. Next to Type of Upload, select your file type.
4. Next to Upload Template, click Browse and select your file. Once certain it is the correct file, click the blue Upload button.
5. If the template is successfully uploaded you will see a success message. Large files may take some time to process. You can check the status on the "Upload and/or Update Multiple Properties" page.

- 1 A custom spreadsheet is created based on selected items (remember do not add or remove columns)
- 2 Download the spreadsheet and save on your desktop
- 3 Carefully read the **Instructions** tab to avoid improper data entry errors



# Add bills – spreadsheet tips

- 1 Grey sections are pre-filled by Portfolio Manager. Do not change values!
- 2 Green sections are required. Double check entries!
- 3 Blue sections are optional (cost) or required if green energy is consumed

	A	B	C	D	E	F	G	H	I	J
	Meter ID (Pre-filled)	Meter Consumption ID (Pre-filled)	Portfolio Manager ID (Pre-filled)	Property Name (Pre-filled)	Meter Name (Pre-filled)	Meter Type (Pre-filled)	Start Date (Required)	End Date (Required)	Usage (Required)	Meter Unit (Pre-filled)
1										
2	101595273	4772215428	15176237	Sample Office (Canada)	Electric Grid Meter / Compteur électricité du réseau	Electricity - Grid Purchase	Last Bill 12/13/2018 1/11/2019		456769 kWh (thousand Watt-hours)	
3	101595273		15176237	Sample Office (Canada)	Electric Grid Meter / Compteur électricité du réseau	Electricity - Grid Purchase				kWh (thousand Watt-hours)
4	101595273		15176237	Sample Office (Canada)	Electric Grid Meter / Compteur électricité du réseau	Electricity - Grid Purchase				kWh (thousand Watt-hours)

Navigation: Instructions | **Add Bills-Electricity** | Add Bills-Non Electric | Paramètres d'affichage | 90 %

Last entry in Portfolio Manager

**Start Date**  
The Start Date is the date (XX/XX/XXXX) of the first day of the billing cycle.  
Use either DD-MM-YYYY or MM-DD-YYYY, to match your Operating System's date setting.

Make sure that there is no gap or overlap in the date. However, the data can be 0 (if you have no gas consumption in summer, for example).



# Once again, before uploading...



## DOUBLE CHECK YOUR INFORMATION



**Upload Spreadsheets**

When you are ready to upload your completed template (either standard or custom), enter it here. Processing time could be affected by file size.

Type of Upload:

Upload Template:  Aucun fichier choisi

Select "Browse" to locate the file on your computer and then select "Upload."

**This is a powerful feature. There is no "Undo." Be careful!**

- Multiple submissions could result in duplicate data being added to your portfolio, property or meter. Please test this feature with only a few properties first.
- Depending on internet speeds, files larger than 2 MB may not be able to be successfully uploaded to the server before the session times out. Files near this size may take several hours to process. While your spreadsheet upload is processing, you will not be able to upload any other spreadsheets.
- Your spreadsheet must be in Microsoft Excel format. Please use the templates provided or generated using Portfolio Manager to upload or update your properties.

If the spreadsheet is uploaded twice, 2 sets of data for each month will be in ESPM. **Manual removal will be needed.**

If the spreadsheet is more than 2 MB, it will take HOURS. Split it into smaller spreadsheets to avoid uploading problems.

Keep it in Microsoft Excel format to avoid problems.



# Share Property Data

Sharing, viewing, reporting, and editing data with other Portfolio Manager Users



# Sharing properties

## Why?

➤ Give another user or more users access to your property to either:

- **View**
- **Report**
- **Edit**

➤ Don't need to share a login to share data

➤ Can be shared with external stakeholders or external consultants

Once you share your property with others, they will see the property on their home page.

### **Process for Sharing**

1. Connect with Others
2. Share Properties
3. Manage Your Shared Properties

# Sharing properties

- 1 Add a contact and send a connection request by clicking on **Add Contact**
- 2 Confirm you are connected to the person you want to share with on the **Contacts** page. Your contacts have to accept your sharing request.

The screenshot displays the ENERGY STAR Portfolio Manager interface. At the top, the logo and navigation links are visible. The main content area shows a notification about a canceled connection request, followed by a 'My Contacts' section with a search bar and a 'Search for new contacts' button. Below this is a table of contacts with columns for 'All', 'B', and 'C', and a 'Name' column. The 'Add Contact' button is highlighted with an orange box. A modal window titled 'Add Contact' is open, showing two options: 'Find Contact in Portfolio Manager' and 'Add New Contact'. The 'Find Contact in Portfolio Manager' option is also highlighted with an orange box. The 'Add New Contact' form includes fields for First Name, Last Name, Job Title, Organization, and Country. The 'Add Contact' modal also contains helpful tips for connecting with other users, keeping personal contacts, and organizing personal contacts by organization.

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

MyPortfolio | Sharing | Reporting | Recognition

You have canceled your connection request to Stéphanie Mayer. If this was a mistake, you can send another [connection request](#).

### My Contacts

This is where you keep track of your contacts and/or organizations (i.e. people or companies associated with your properties such as Professional Engineers, Registered Architects, or others with whom you share information). You can add anyone as a contact, regardless of whether they have a Portfolio Manager account and you can share your properties & reports with any of your **connected** contacts. You can "connect" to other Portfolio Manager users by searching for their accounts and sending a connection request.

Share Edit Delete **Add Contact** Add Connection

All	B	C	Name
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bouhillette Parizeau Architecture/Design Firm
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Marc-Antoine Chenail (No Account)

Share Edit Delete **Add Contact** Add Connection

Follow Us

### Add Contact

There are two ways to add a contact. First, search below to see if the contact you would like to add has a Portfolio Manager account. If you find the person, send a Connection Request, and when they accept the request, they will be added to your Contacts. Second, if the contact you would like to add does not have a Portfolio Manager account, then you can create an entry within your personal contacts.

#### Find Contact in Portfolio Manager

Search for any contact by name or organization.

Name:

Organization:

Username:

Email:

**Search** **Cancel**

#### Add New Contact

First Name:

Last Name:

Job Title:

Organization:  **Select Organization** **Add New Organization**

Country:  **--- Select ---**

#### Connecting with Other Users

If you think your contact already has an account in Portfolio Manager, search for them. If you find the person, send a Connection Request, and if they accept they will be added to your Contacts. You can easily [share your property](#) information with your contacts.

#### Keeping Personal Contacts

If the contact you want to add does not have a Portfolio Manager account, you can still add them as your personal contact.

#### Organizing Personal Contacts by Organization

Portfolio Manager requires that you select an organization from your Contacts Book for each contact. If the [organization](#) you are looking for is not here, you must first [add the new organization](#). After you add the organization it will show up as an option for "Organization".

# Sharing properties

➤ Don't forget to look at your **Notifications**

The screenshot shows the Energy Star Portfolio Manager interface. At the top right, the 'Notifications' link is highlighted with an orange box and has a red '2' next to it. Below the navigation tabs, the 'View All Notifications (2)' section is shown, with the 'Outgoing Requests (1)' tab highlighted by an orange box. A table of notifications is displayed below, with one notification listed: 'You have sent a connection request to Marc-Antoine Chenail. Once they have accepted the request, you will be able to share properties with Marc-Antoine Chenail.' The notification date is 4/19/2021. The table has columns for Type, Notification, and Date. There are 'Cancel' and 'Clear' buttons at the top and bottom right of the table. A 'Close' button is located at the bottom right of the notification panel.

ENERGY STAR PortfolioManager®

Welcome Account | Notifications <sup>2</sup> ENERGY STAR Notifications | Contacts | Help | Sign Out

Portfolio101: Settings

MyPortfolio | Sharing | Reporting | Recognition

View All Notifications (2)

Incoming Requests (0) | **Outgoing Requests (1)** | Notices (1)

Type	Notification	Date	
	You have sent a connection request to <a href="#">Marc-Antoine Chenail</a> . Once they have accepted the request, you will be able to share properties with <a href="#">Marc-Antoine Chenail</a> .	4/19/2021	<input type="checkbox"/>

Page 1 of 1 | 100 | View 1 - 1 of 1

Close

# Sharing properties

3

Share one or more of your properties with your connected contacts and **specify the level of access** the contacts will be **granted** to view and/or edit your properties

4

Your contacts must accept the sharing request to see the property on their account

The screenshot shows the ENERGY STAR Portfolio Manager interface. The top navigation bar includes 'MyPortfolio', 'Sharing' (highlighted with an orange box), 'Reporting', and 'Recognition'. The main content area is divided into two columns. The left column, titled 'My Shared Properties (0)', contains three buttons: 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. The right column, titled 'Sharing Notifications (0)', contains the text 'You have no new notifications.' Below this is a 'More About Sharing' section with an information icon and text explaining that no properties are currently shared and providing a link to 'Learn more about exchanging data.' The footer includes social media links for Twitter, Facebook, YouTube, and LinkedIn, along with links for 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

## Share (or Edit Access to) Properties

Sometimes it's really important to be able to share your property with someone else. Maybe they need to help monitor your property, enter energy information (perhaps automatically) or process applications for recognition. If this sounds like what you need, start out by selecting the property(ies) that you'd like to share and who you'd like to share with them. If you have already shared properties, you can also use this form to edit people's access to your properties.



### Select Properties

We'll get into the details of the level of access later. For now, which properties do you want to share and/or edit access to?

One Property  Office Ottawa



### Select People (Accounts)

Which people (accounts) do you want to share these properties with (or modify their current access to)? The access for each can be different and you'll be able to specify that on the next page.

Select contacts from my contacts book:

Marc-Antoine Chenail (machenail)  
Stéphanie Mayer (Portfolio201)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection. Only your connected contacts appear in this list.



### Choose Permissions

If you only need to choose one permission (because you are doing a single share or you want to give the same permissions for all of your shares), select "Bulk Sharing." If you need to assign different permissions, select the 2nd option.

\*  **Bulk Sharing ("One-Size-Fits-All")** - I only need to choose one permission (either because I am doing a single share OR I want to choose the same permission for all of my share requests).

Read Only Access

Full Access

Custom Access (meters are all shared at the same level)

Exchange Data (You can share in bulk for exchanging data [here](#) or you can assign permissions one by one for each property using the radio button below.)

Remove Access

**Personalized Sharing & Exchange Data ("Custom Orders")** - I need to give different permissions for different share requests, and/or I need to give Exchange Data permission.

**Share Property(ies)** [Cancel](#)

### Sharing with Accounts

In order to share properties with others (either individuals or organizations), you need to be "connected" with them. To make a connection, go to the "Contacts" page and search for them under "Add Contact" or "Add Organization" (they need to have a Portfolio Manager account). Once you find them, send a "Connection" request. When they accept your connection request, they will show up on the list to the left.

### Exchanging Data with Web Service Providers?

If you need to share your property(ies) with a Web Service Provider or Utility, use the ["Set Up Web Services/Data Exchange"](#) page.

### Who gets to Share Forward?

**Full Access** - Automatically includes "Share Forward" rights

**Read Only** - Automatically does NOT include "Share Forward" rights

**Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

**Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

## Select Custom Access Permissions for Properties and Contacts Selected

Please select the permissions level you would like to grant for each item. If "None" is selected for all items, no share will occur.

Item	None	Read Only Access	Full Access
Property Information	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
▼ All Meter Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Goals, Improvements, & Checklists	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Recognition	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

Additional Options:

Item	Yes	No
*Share Forward Allow the person (or people) selected to share the selected properties with others and give them any permissions that they have, including the right to share with more people.	<input type="radio"/>	<input checked="" type="radio"/>

### About Permissions

Select permissions for each category. You must provide Read Only or Full Access to the Property Information to share a property.

### Property Information

Includes access to everything on

**Apply Selection** [Cancel](#)

# Sharing tab

You can manage and remove contacts' access to your properties

The screenshot shows the Energy Star Portfolio Manager interface. At the top, the 'Sharing' tab is highlighted with an orange box and an arrow. Below the navigation tabs, a green notification box states: 'You have successfully shared/edited access to your property(ies). If you shared properties, you will receive a notification when your contact has accepted the share. If you edited access to current permissions, the edits have been made, no acceptance is required.'

On the left, the 'My Shared Properties (1)' section contains three buttons: 'Share (or Edit Access to) a Property', 'Set Up Web Services/ Data Exchange', and 'Download Sharing Report'. On the right, the 'Sharing Notifications (1)' section shows a notification for 'Office Ottawa - Sharing request sent to Marc-Antoine Chenail' with 'Cancel' and 'Clear' buttons.

The main content area is titled 'Overview of Shared Properties' with a link to 'Learn more about Sharing Properties'. It features two tabs: 'By Contact' (selected) and 'By Property'. A filter dropdown is set to 'All Sharing Contacts'. A search bar is present. Below is a table with the following data:

Name	Organization	Properties We Share	Action
<a href="#">Marc-Antoine Chenail</a> (machenaill)	Bouthillette Parizeau	1	<ul style="list-style-type: none"><li>I want to...</li><li>I want to...</li><li><b>View Contact's Permissions</b></li><li>Edit Contact's Permissions</li><li>Remove Contact's Access to My Properties</li><li>Share Properties With Contact</li></ul>

Below the table, a note states: 'This table represents people with whom you share at least one property, either because you shared one with them, they shared one with you, or another person's property. For complete sharing information, [download the Sharing Report](#) for your portfolio.'

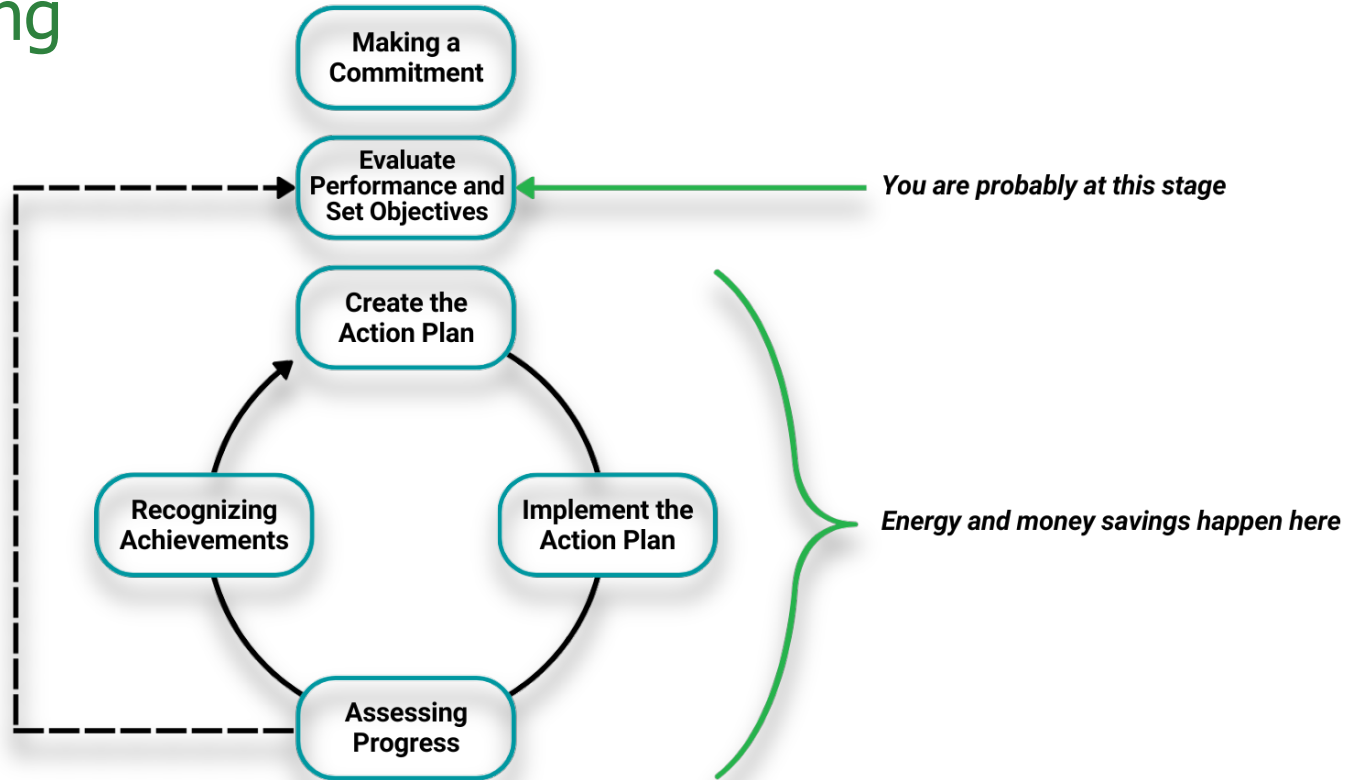
At the bottom, there are social media links for 'Follow Us' (Twitter, Facebook, YouTube, LinkedIn) and a footer with links for 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.



# Set baselines, goals, and targets to plan energy improvements

Setting baseline targets for one or multiple properties

# Benchmarking










# Set a baseline and/or target

- Establish a baseline and target for **ALL properties** or
- Set different baselines and targets for **EACH property**



## 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.

# One baseline for all properties

Set Baselines & Target for All Properties

You can establish the same performance baseline and target for all of your properties. **Be careful! Selections have already made for your individual properties.** Changes you make below will change all properties when you have Full Access to Goals tab. If you prefer to set baselines and targets for each property individually, you can

**Baselines**

Energy Baseline:  Select a baseline year: Dec 31 ▼ 2019 ▼

**Baselines are based on 12 complete months of property use and energy consumption information. If one or more properties in your portfolio do not have adequate information to support the date you pick, you will not be able to receive metrics for your baseline for those properties.**

Let Portfolio Manager automatically set my baselines  
 Leave property-specific baselines as currently set

Water Baseline:  Select a baseline year: Month ▼ Year ▼

Let Portfolio Manager automatically set my baselines  
 Leave property-specific baselines as currently set

Waste Baseline:  Select a baseline year: Month ▼ Year ▼

Let Portfolio Manager automatically set my baselines  
 Leave property-specific baselines as currently set

Last month in the timeframe =  
Year Ending Date

Select the earliest full 12-month  
period for each building

Leave the baseline set at the  
property level for each property

# One target for all properties

The image shows a screenshot of a web form titled "Energy Target". On the left, there are two fields: "Target Metric:" and "Target Value:". The "Target Metric:" dropdown menu is open, showing options: "Leave property-specific targets as set" (selected), "Leave property-specific targets as set", "No Target", "Target ENERGY STAR Score", "Target % Better than Baseline Source EUI", and "Target % Better than Median". Below these fields is a blue button labeled "Save Baselines & Target" and a link for "Cancel".

To the right of the form is a warning box with an information icon and the text: "Be Careful. Setting baselines and targets using this form will re-set any targets or baselines you have set for your properties individually."

Below the main form is a larger, zoomed-in view of the "Energy Target" form. In this view, the "Target Metric:" dropdown is set to "Target ENERGY STAR Score". The "Target Value:" field contains the number "77" and is followed by "(1-100)". A blue button labeled "Save Baselines & Target" and a link for "Cancel" are visible at the bottom right of this zoomed-in view.

# Set different baselines and targets for each property

The screenshot displays the ENERGY STAR Portfolio Manager interface. The 'Goals' tab is selected, showing a 'Metrics Comparison for Your Property & Your Target' table and a 'Baselines & Targets' table. An orange arrow points to the 'Set Baselines or Target' button in the bottom right corner of the 'Baselines & Targets' section.

**ENERGY STAR Portfolio Manager**

Welcome Account | Notifications | ENERGY STAR Portfolio101: Settings

MyPortfolio | Sharing | Reporting | Recognition

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

Dashboard

View All Properties (1) | None

Source EUI Trend (GJ/m<sup>2</sup>)

Change Metric

Chart current as of 03/30/2021 01:05 PM GMT-0400

Refresh Chart

Energy Performance (GJ/m<sup>2</sup>)

Energy Use Intensity

Baseline (Dec 2018) | Current (Dec 2018)

Source EUI | Site EUI

Generate & Download Performance Documents for this Property

- Statement of Energy Performance (SEP)
- ENERGY STAR Scorecard
- Progress & Goals Report
- Data Verification Checklist
- Water Scorecard

Total Project Investment \$0.00

Metrics Comparison for Your Property & Your Target [Change Time Period](#)

Metric	Dec 31 2016 (Energy Baseline)	Dec 31 2018 (Energy Current)	Target*	Median Property*
ENERGY STAR score(1-100)	28	22	60	50
Source EUI(GJ/m <sup>2</sup> )	2.01	2.15	1.60	1.65
Site EUI(GJ/m <sup>2</sup> )	1.19	1.28	0.89	0.98
Source Energy Use(GJ)	51487.2	55038.7	38437.5	42203.2
Site Energy Use(GJ)	30403.5	32884.3	22825.8	25082.0
Energy Cost(\$)	525265.46	562528.11	392854.22	431341.38
Total GHG Emissions(Metric Tons CO <sub>2</sub> e)	544.0	598.2	417.8	458.7

\* 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.

Baselines & Targets

	Baselines	Target
Energy	12/31/2016	60
Water	12/31/2016	Not Available
Waste/Materials	12/31/2016	Not Available

[Set Baselines or Target](#)

# Specific baseline to a property

Last month of an available  
12-month period

The drop-down menu will  
only show the ending date  
of full 12-month period

MyPortfolio | Sharing | Reporting | Recognition

## Set Performance Baseline & Target

To establish a performance target, you must first set a baseline for comparison. Then, you can establish a performance target by either defining a target rating or a target reduction (%). The energy use and costs displayed reflect required levels to meet either the target rating or percent reduction goal for this property.

Targets are not available at this time for water or waste/materials, however setting a baseline can still provide you with a starting point on which to evaluate your property's progress.

**Baselines**

Energy Baseline:  Select a baseline: 12/31/2016  Let Portfolio Manager determine my baselines

Water Baseline:  Select a baseline:  Let Portfolio Manager determine my baselines

Waste Baseline:  Select a baseline:  Let Portfolio Manager determine my baselines

**Selecting Baselines**

A **baseline** is made up of 12 full calendar months of use information as well as meter entries (either energy, water, or waste/materials). It is defined by selecting the last month in the time frame (also known as the **Year Ending Date**). Portfolio Manager can automatically determine your baseline by calculating the earliest eligible year ending date.

# Specific target to a property

If not specified, it is the earliest full 12-month period

If not specified, it is the latest full 12-month period

Energy Target

Energy Target Metric: \* Target ENERGY STAR Score

Energy Target Value: \* 60 1-100 value

**Save & Calculate Other Metrics**

Select "Calculate Other Metrics" to refresh the table after making changes to "Target Metric" and "Target Value"

Metric	Dec 2016 (Energy Baseline)	Dec 2018 (Energy Current)	Target*	Median Property*
ENERGY STAR score (1-100)	28	22	60	50
Source EUI (GJ/m <sup>2</sup> )	2.01	2.15	1.50	1.65
Site EUI (GJ/m <sup>2</sup> )	1.19	1.28	0.89	0.98
Source Energy Use (GJ)	51,467.2	55,038.7	38,437.5	42,203.2
Site Energy Use (GJ)	30,403.5	32,684.3	22,825.8	25,062.0
Energy Cost (\$)	525,265.46	562,528.11	392,854.22	431,341.38
Total GHG Emissions (Metric Tons CO <sub>2</sub> e)	544.0	598.2	417.8	458.7

**Save Baselines & Target** Cancel

## About Design Targets

On this page you can set a target for your property to track its progress after it has become operational. If your property is still in the design stage, you can use the design features to [set design targets](#).

## If you are seeing "Not Available"...

The Current and Baseline metrics (in the chart to the left) require 12 full months of energy consumption and property use information. The Target metrics may also require 12 months of data. Therefore, if you are seeing "Not Available", then there is not enough information available to calculate these metrics. Update your [meters](#) and/or [property use information](#).



# Create custom reporting templates

Create custom reports to share or track your performance with others outside of ESPM

# Create report or download your data

## Why create a report?

- > Show your building's performance to stakeholders
- > Track improvements

## Why download your data?

- > Backup data of all your properties
- > Change of owners/management

Each time you generate a report or an Excel spreadsheet, **make sure to save it on your computer** because it is not saved in your account.



# MyPortfolio - Download your Entire Portfolio to Excel

**ENERGY STAR® PortfolioManager®**

Welcome Account | Notification  
Portfolio191: Settings

MyPortfolio | Sharing | Reporting | Recognition

Properties (2)  
[Add a Property](#)

Dashboard  
View All Properties (2) | None  
[Add/Edit/Delete/Share](#) | [Add/Edit/Delete/Views](#)

Name  
Office Class  
1502543  
Sample Office (Canada)  
15176237  
[First](#) [Previous](#) Page 1 of 1 [Next](#) [Last](#) 100 ▾

Source EUI Trend (GJ/m<sup>2</sup>)  
[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](#)

**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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### 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.

This could take a while if you have a lot of properties

Property Name	Portfolio Manager ID	Portfolio Manager Meter ID	Meter Name	Meter Type	Meter Consumption ID	Start Date	End Date	Delivery Date	Usage/Quantity	Usage Units	Cost (\$)	Estimation?
My Portfolio: Stéphanie Mayer												
04/14/2021 02:10 PM EDT												
Total Properties: 2												
Sample Office (Canada)	15176237	101595272	Natural Gas / Gaz naturel	Natural Gas	4772215258	2016-01-01	2016-01-31	Not Available	45299,05	cm (cubic meters)	13833	No
Sample Office (Canada)	15176237	101595272	Natural Gas / Gaz naturel	Natural Gas	4772215259	2016-02-01	2016-02-29	Not Available	64516,82	cm (cubic meters)	20445	No
Sample Office (Canada)	15176237	101595272	Natural Gas / Gaz naturel	Natural Gas	4772215260	2016-03-01	2016-03-31	Not Available	45299,05	cm (cubic meters)	13833	No
Sample Office (Canada)	15176237	101595272	Natural Gas / Gaz naturel	Natural Gas	4772215261	2016-04-01	2016-04-30	Not Available	64516,82	cm (cubic meters)	20445	No

Properties | Property IDs | Uses | Use Details | Meters | Aggregate Meter Info | **Meter Entries** | Energy Projects | Design Uses | Design Use Details | Design Energy | Design Targets | Targets And Baselines

# MyPortfolio – custom download

**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.

### Create a Custom Download

Whether you have entered one year or ten year's worth of data, you can export your raw data to Excel to see it in one consolidated place. Take a look at an [example download](#) to get a feel for what is included.

Use the form below to choose exactly what data you need to download.

**1** Select Properties to Include

Properties:   Selected Items: 0

**2** What type of data do you want to include?

- Basic Property Information**  
Download basic property information such as name and address.
- Property IDs**  
Download property IDs (e.g. Client ID#, Standard ID#)
- Uses**  
Download which uses are at each property (eg. Office)
- Use Details**  
Download the values entered for your uses (e.g. Weekly Operating Hours)
- Meters**  
Download basic information such as name, unit and dates when the meter was in use.  

Which type of meters do you want to download?

  - Energy
  - Water
  - Waste/Materials
  - IT Energy
  - Plant Flow
- Include individual meter data for any aggregate meters**
- Meter Entries**  
Download individual meter entries you have entered.
- Energy Projects**  
Download information about energy projects.
- Design Data**  
Download design data entered for each property.
- Target and Baseline**  
Download energy target and energy, water and waste baselines for each property.

### Select Properties

Search:

<input type="checkbox"/>	Name	Property Type	State/Province
<input type="checkbox"/>	<a href="#">Office Ottawa</a>	Office	ON
<input type="checkbox"/>	<a href="#">Sample Office (Canada)</a>	Office	ON

Filter Properties (2)

Filter by Property Type

- Office (2)

Filter by Construction Status

- Existing (1)
- Test (1)

Filter by State/Province

- Ontario (2)

Filter by Shared from

- None - My Properties (PDA) (2)

# For a specific property

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

### Meter Summary

4 Energy Meters Total  
4 - Used to Compute Metrics

[Add A Meter](#)

Current Energy Date  
Mar 31, 2020

[Enter Your Bills](#)

---

**1** Five Ways to Enter Bill Data

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

---

Your Property is: [Edit](#)

- A Single Building
- Part of a Building
- A Campus of Multiple Buildings

You Are Tracking: [Edit](#)

---

### Energy Use by Calendar Month (Not Weather Normalized)

[Export Data by Calendar Month](#)

---

### Meters - Used to Compute Metrics (4)

[Change Meter Selections](#)  
[View as a Diagram](#)

Name	Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Main CH	103348559	District Chilled Water - Electric	04/01/2020	Yes
Main Electric	103348556	Electric - Grid	04/01/2020	Yes
Main Gas	103348557	Natural Gas	04/01/2020	Yes
Main HW	103348558	District Hot Water	04/01/2020	Yes

[Download Annual Totals by Meter](#)

OR

MyPortfolio Sharing Reporting Recognition

## Office Ottawa

123 main, Ottawa, ON K1A0M2 | [Map It](#)  
Portfolio Manager/Property ID: 1552843  
Year Built: 1990  
[Edit](#)

[Not currently eligible for ENERGY STAR Certification](#)

[Change Metric](#)

### ENERGY STAR Score (1-100)

Current Score: 96  
Baseline Score: 73

---

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

[Refresh to see Source EUI Trend](#)  
[Change Metric](#)

---

### Metric Summary

Metric	Oct 2018 (Energy Baseline)	Mar 2020 (Energy Current)	Change
ENERGY STAR Score (1-100)	73	96	+23.00 (+31.50%)
Source EUI (kWh/m²)	1.54	0.98	-0.56 (-36.47%)
Site EUI (kWh/m²)	1.06	0.67	-0.39 (-36.85%)
Energy Cost (\$)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A
Total GHG Emissions Intensity (kgCO2e/m²)	37.2	23.9	-13.30 (-35.80%)
Water Use (All Water Sources) (m³)	11,667.2	17,054.4	+5,387.2 (+46.20%)
Total Waste (Disposal and Charter) (Metric Tons)	<a href="#">Not Available</a>	<a href="#">Not Available</a>	N/A

[Change Metrics](#)  
[Change Time Periods](#)

---

### Data Quality Checker

Run a check for any 12-month time period to see if there are any possible errors found with your data.

[Check for Possible Errors](#)

---

### Sharing this Property

[Share](#)

---

### More About Sharing

You haven't [shared your property](#) yet. Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g. property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about ecotransparency.](#)

[Copy Property](#) [Transfer Ownership](#) [Download Property to Excel](#)

# Reporting tab - analyze progress and performance

Choose from preset chart & graph options

View and use standard reports

View and use custom report templates

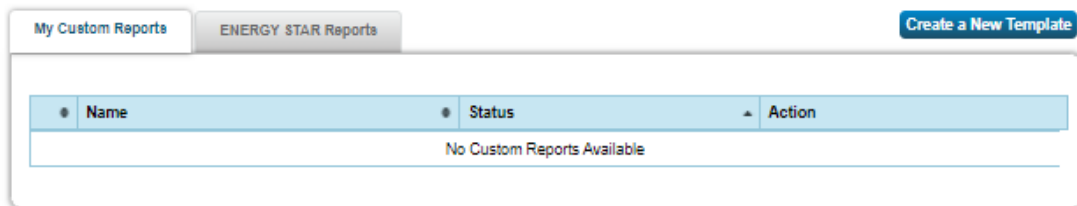
The screenshot shows the 'Reporting' tab interface. At the top, there are navigation tabs: 'MyPortfolio', 'Sharing', 'Reporting' (highlighted with an orange box), and 'Recognition'. Below the tabs, the main content area is divided into two sections. On the left, under 'Charts & Graphs', there is a 3D bar chart with a central circular graphic showing a building and a lightning bolt. Below the chart is the text: 'Weather Normalized Source EUI' and 'How much total primary fuel would be required by my properties, under average weather conditions?'. On the right, under 'ENERGY STAR Performance Documents', there is a list of document links: 'Statement of Energy Performance (SEP)', 'Statement of Energy Design Intent (SEDI)', 'Data Verification Checklist', 'Progress & Goals Report', 'ENERGY STAR Scorecard', and 'Water Scorecard'. At the bottom, there are two tabs: 'My Custom Reports' and 'ENERGY STAR Reports'. To the right of these tabs is a 'Create a New Template' button. Below the tabs is a table with columns for Name, Status, and Action.

Name	Status	Action
Water Performance	Last Modified: 4/14/2021 10:37 AM	I want to... ▼
Performance Highlights	Last Modified: 4/14/2021 5:53 AM	I want to... ▼
Energy Performance	Generated: 4/13/2021 3:39 PM	I want to... ▼
Waste Performance	Last Modified: 4/13/2021 2:28 PM	I want to... ▼
ENERGY STAR Certification Status	Last Modified: 4/13/2021 1:19 PM	I want to... ▼
Emissions Performance	Last Modified: 4/13/2021 2:48 AM	I want to... ▼

View and download performance documents in PDF

generate custom report templates in Excel

# Reporting tab – my custom reports

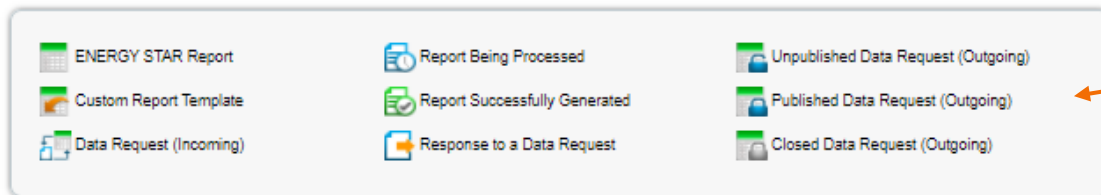


Create a new report template to:

- Generate a custom report
- Share your template
- Request data from others

- **Need help with your state/local ordinance report?** See our 5-page guide: [How to respond to data requests in Portfolio Manager](#) and our [FAQ](#) with a link to each city program.
- **Generated reports will only be available for 90 days.** After that time you just need to "generate" a new report to populate your template with data.

## Key



Report icons explained

# Create a report template

As you create and save your templates, they will appear in the Templates & Reports section. A unique name will help to find and use your templates.

Property(ies):

- One
- Multiple
- All

MyPortfolio | Sharing | Reporting | Recognition

## Create a Report Template

Report templates provide you with an easy way to regularly access information and metrics. You can regularly prepare reports use your custom report template to collect data from other Portfolio Manager users. You can even share templates that you or similar needs with their properties.

- 1 Name Your Template**  
Name: \*   
Please provide a unique name for this template
- 2 Select Timeframe**  
Timeframe: \*  for:   
Each property must have 12 full months of data for metrics to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report. Pick the **last day** of the 12 month period that you want.
- 3 Select Properties**  
Properties:
- 4 Select Information & Metrics**  
Information & Metrics: \*  Selected Items: [4](#)

[Cancel](#)

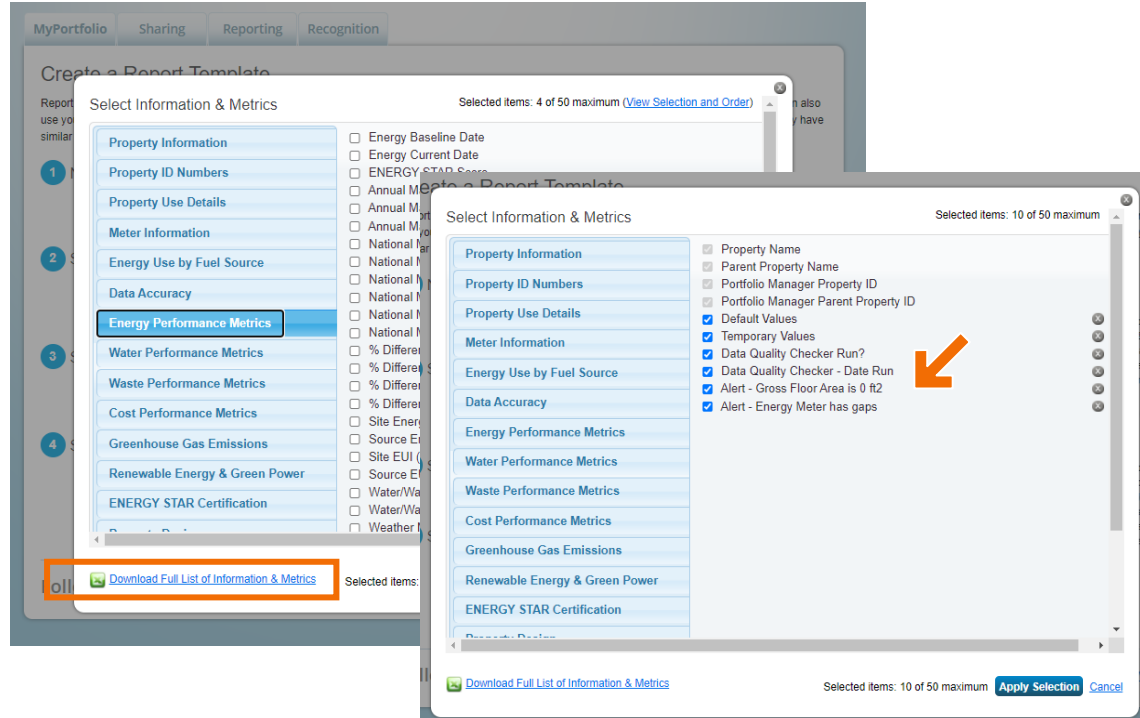
Timeframe:

- Current year
- Baseline year
- Current vs Baseline
- Single year
- Compare two years
- Date range

Energy, Water, OR  
Waste

# Select information & metrics

- More than 1,680 different choices of information or metrics to select from – you can download the full list.
- 50 maximum per template, including the 4 preselected ones (Property Name and IDs).
- Data accuracy = useful to check more than 1 building at the same time (Alert and Temporary, Estimated or Default Data Flag).
- You can choose the position you want to see the metrics by moving them.



# My custom report

## 1 Step 1- Generate new report

My Custom Reports ENERGY STAR Reports Create a New Template

Your new report(s) has been generated

Name	Status	Action
Template Test 1	Generated: 4/15/2021 2:47 PM	I want to...
Template Test 2	Last Modified: 4/15/2021 11:15 AM	I want to... Generate New Report Edit this Template Share this Template Request Data using this Template Delete this Template

First Previous Page 1 of 1 Next Last 10

- Need help with your state/local ordinance report? See our 5-page guide: [How to respond to data requests in Portfolio Manager](#) and our [FAQ](#) with a link to each city program.
- Generated reports will only be available for 90 days. After that time you just need to "generate" a new report to populate your template with data.

## 2 Step 2 – View or Download the report

My Custom Reports ENERGY STAR Reports Create a New Template

Your new report(s) has been generated

Name	Status	Action
Template Test 2	Generated: 4/15/2021 3:22 PM	I want to...
Template Test 1	Generated: 4/15/2021 2:47 PM	I want to... View Current Report Download Current Report in Excel Download Current Report in XML Generate New Report Edit this Template Share this Template Request Data using this Template Delete this Template

First Previous Page 1 of 1 Next Last 10

- Need help with your state/local ordinance report? See our 5-page guide: [How to respond to data requests in Portfolio Manager](#) and our [FAQ](#) with a link to each city program.
- Generated reports will only be available for 90 days. After that time you just need to "generate" a new report to populate your template with data.

You can : Generate a new report, Share this template, Request data using template



# My custom report – share this template

You need to have already connected with a Contact

## When sharing:

- The template that you've created will show in their My Custom Reports tab.
- If they modify the data or the template, it will have no effect on your original template in your account. If you modify your template, they will not see it either.
- No communication between the two templates.

ENERGY STAR PortfolioManager®

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

MyPortfolio Sharing Reporting Recognition

### Share Your Custom Report Template

Portfolio Manager allows you to share a copy of your custom report template with other individuals who use Portfolio Manager. You can choose to create a copy directly into your connected contacts accounts or have Portfolio Manager provide you with a link that you can give to people in order for them to copy the template into their own account.

How would you like to share your report template?

- Share template directly into **connected contact** accounts.
- Provide a link that any person can use to copy the template into their own portfolio Manager account

Select the "Share Template" button below in order to view the link.

**Share Template** Cancel

**More About Sharing Templates**

Sharing a report template creates an independent copy of your custom report template in another person's account. The copy is just a template and does not include your property information. If you want others to see your property information, you will need to [share your property](#) with them; if you need to collect data about other people's properties you

The link to share your report template has been created:

<https://portfoliomanager.energystar.gov/om/reports/template/3233300/share/99407653-0aca-4d0f-863d-fe69adbc7bea>

Please share this link with others in order for them to copy your report template into their own Portfolio Manager accounts. If they do not currently have an account, they will be required to create one before they can see the report template.



# Questions?

Feel free to contact me at  
[mpadvaiskas@bpa.ca](mailto: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

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# Thank you!

[SaveOnEnergy.ca/Training-and-Support](https://www.saveonenergy.ca/training-and-support)

[trainingandsupport@ieso.ca](mailto:trainingandsupport@ieso.ca)



[@SaveOnEnergyOnt](https://twitter.com/SaveOnEnergyOnt)



[facebook.com/SaveOnEnergyOntario](https://facebook.com/SaveOnEnergyOntario)



[linkedin.com/showcase/  
SaveOnEnergy-Ontario](https://linkedin.com/showcase/SaveOnEnergy-Ontario)



Sign up for Save on Energy's quarterly business newsletters for the latest program, resource and event updates