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

Megan Padvaiskas, P.Eng/ing.
Sustainability Engineer, BPA

ieso
Connecting Today.
Powering Tomorrow.

SAVE ON ENERGY
POWER WHAT'S NEXT

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

ieso
Connecting Today.
Powering Tomorrow.

SAVE ON ENERGY
POWER WHAT'S NEXT

Recap: property tabs

Summary tab

Property use Details

Recap: Data tab (energy + water)

Add a meter

Enter your bills

Change meter selection

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

Export data by calendar month

Download annual totals by meter

Metrics summary & editing property data

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

Summary tab metrics

Customize your different views:

⚠️ To get any metrics you need <u>at least 12</u> consecutive months of data

Summary tab metrics

Adjust displayed metrics:

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

Edit property – basic information

1 Select the property

2 Edit on main page **or** details tab

Edit property – basic information

MyPortfolio | Sharing | Reporting | Recognition

Edit Sample Office (Canada)

Address Information

Name:	Sample Office (Canada)
Country:	Canada
Street Address:	123 rue Main Street
City/Municipality:	Toronto
County:	
State/Province:	Ontario
Postal Code:	M5G1A1

Property Details

What is the primary function of your property? | Office

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
(Campus Guidance)

How many?

Construction Status:
- ○ Existing
- ○ Design
- ● Test

Year Built: 1975

Gross Floor Area: 25,548 Sq. M.
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: 0 Sq. M.

Occupancy: 95 %

Property Photo (optional): Choisir un fichier 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

Update Property Cancel

> The occupancy is NOT used to calculate any metrics

> The address can be modified but the country cannot be changed

ieso
Connecting Today.
Powering Tomorrow.

SAVE ON ENERGY
POWER WHAT'S NEXT

From the Details tab, you can also:

Edit Property IDs

Designate a Service and Product Provider

Delete this Property
Note it is permanent

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)

Correct or update property use details

To change or update any information

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

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:

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

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: * Office Use

Property Use Detail	Value	Current As Of	Temporary Value
⭐ Gross Floor Area	* [ ] Sq. Ft. ⌄	1/1/1975 📅	☐
⭐ Weekly Operating Hours	[ ] ☐ Use a default	1/1/1975 📅	☐
⭐ Number of Workers on Main Shift	[ ] ☐ Use a default	1/1/1975 📅	☐
⭐ Percent That Can Be Cooled	[⌄] ☐ Use a default	1/1/1975 📅	☐
⭐ Percent That Can Be Heated	[⌄] ☐ Use a default	1/1/1975 📅	☐
Number of Computers	[ ] ☐ Use a default	1/1/1975 📅	☐

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

Example: if a part of the office becomes vacant

1 **Add Another Type of Use**

2 **Rename it** – easily identifiable

3 **Save Use** to save the modification

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: * Vacant Space

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)	5,000	Sq. M.	01/01/2021 📅	☐
⭐ Weekly Operating Hours	0 (as of 01/01/1975)	☐ Use a default	📅	☐
⭐ Number of Workers on Main Shift	0 (as of 01/01/1975)	☐ Use a default	📅	☐
Number of Computers	0 (as of 01/01/1975)	☐ Use a default	📅	☐
⭐ Percent That Can Be Heated	50 % or more (as of 01/01/1975)	☐ Use a default	📅	☐
⭐ Percent That Can Be Cooled	50 % or more (as of 01/01/1975)	☐ Use a default	📅	☐

⭐ 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*

Save Update Cancel

Date when the change occurred

ieso
Connecting Today.
Powering Tomorrow.

SAVE ON ENERGY
POWER WHAT'S NEXT

Example: Modify Property Uses and Use Details

4b   **Update information – Office space**

Area change (be careful of units!):

25,548 m² - 5,000 m² = 20,548 m²

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**

Use the Data Quality Checker

Understanding ESPM's built in data quality checker and alerts

Data Quality Checker

> If you se ❗ it indicates that there is a potential issue with your data
> **Example 1:**

Data Quality Checker

> **Example 2:**

Follow the path and <u>correct the error</u>. Portfolio Manager won't correct the issue on its own

Data Quality Checker - tool

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

Data Quality Checker - tool

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

To create new property(ies)

1 Download the spreadsheet and save it to your desktop

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

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**

⚠️ 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 (Reqired 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
2									
3									
4									
5									
6									
7									
8									
9									
10									
11									
12									

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, <u>exclude</u> the parking energy and GFA from the total energy and GFA of the building. <u>If you CANNOT</u>, 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	C	D	E	F	G	H	I	J	K
1	Property Name (Required)	Use Name (Required)	Open Parking Lot Size (Required)	Open Parking Lot Units (Required)	Open Parking Lot Temporary Value? (Y/N) (Required)	Partially Enclosed Parking Garage Size (Required)	Partially Enclosed Parking Garage Units (Required)	Partially Enclosed Parking Garage Temporary Value (Y/N) (Required)	Completely Enclosed Parking Garage Size (Required)	Completely Enclosed Parking Garage Units (Required)	Completely Enclosed Parking Garage Temporary Value (Y/N) (Required)
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 ⚠️

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 s...
manually 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.

	File Name	Type of Upload	Date	Status
☐	8018-001-3019-PortfolioManager.xlsx	New Property	4/14/2021 9:29 AM	Success
☐	8018-001-3019-PortfolioManager.xlsx	New Property	4/14/2021 9:25 AM	Failed View Errors
☐	8018-001-3019-PortfolioManager.xlsx	New Property	4/14/2021 9:19 AM	Failed View Errors

✖ 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

Creating multiple meters

> Once you've created a new property (or properties) create a custom meter upload 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
1	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 want to add one Custom ID)
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**

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.

Instructions | Add Bills-Electricity | Add Bills-Non Electric | Add Bills-Water

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

ieso
Connecting Today.
Powering Tomorrow.

SAVE ON ENERGY
POWER WHAT'S NEXT

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

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: * Add Meters to Existing 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.

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.

Sharing properties

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

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

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.

1 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 ▼]

2 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.

3 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.

NEW 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	○	●	○
▼ All Meter Information	○	○	●
Goals, Improvements, & Checklists	○	○	●
Recognition	○		●

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.	○	●

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

ieso
Connecting Today.
Powering Tomorrow.

SAVE ON ENERGY
POWER WHAT'S NEXT

Sharing tab

You can manage and remove contacts' access to your properties

Set baselines, goals, and targets to plan energy improvements

Setting baseline targets for one or multiple properties

Benchmarking

Making a Commitment

Evaluate Performance and Set Objectives — *You are probably at this stage*

Create the Action Plan

Recognizing Achievements

Implement the Action Plan

Assessing Progress

Energy and money savings happen here

48
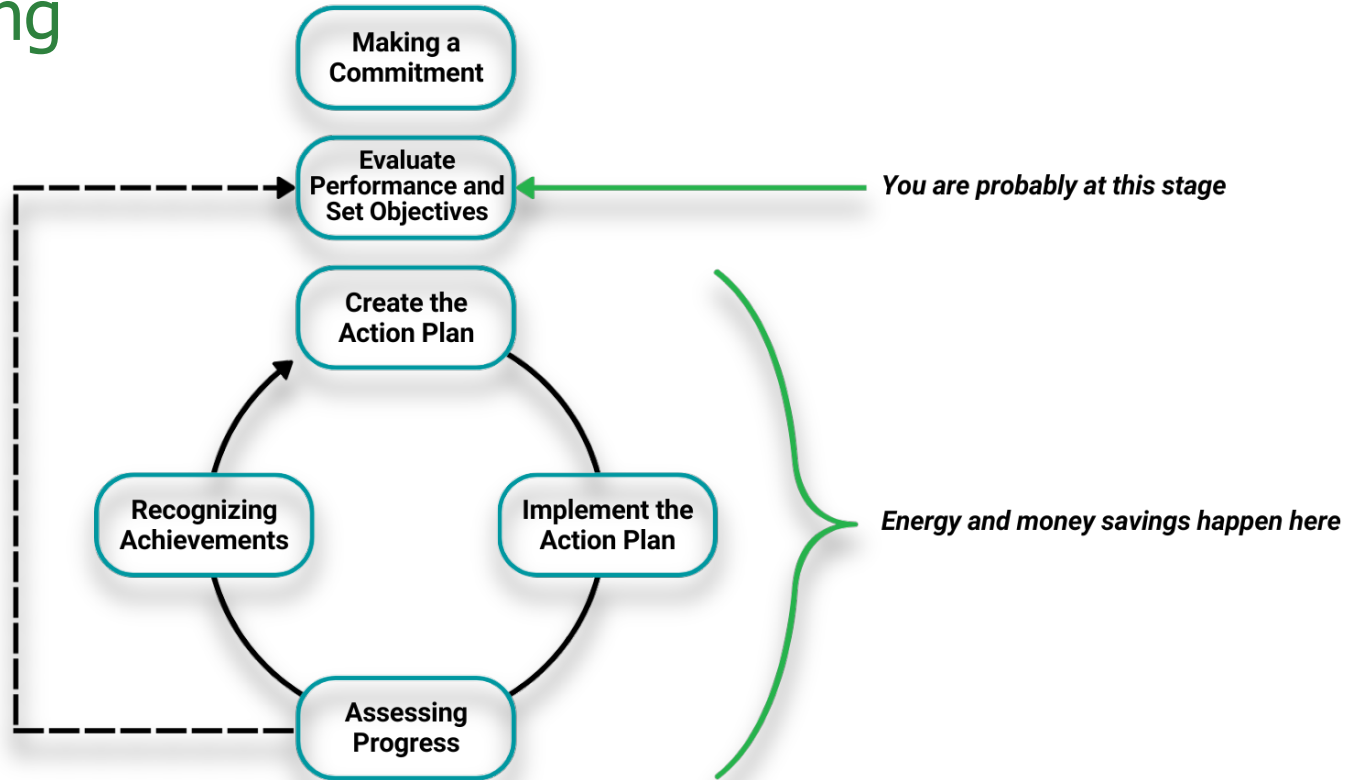
Set a baseline and/or target

> Establish a baseline and target for **ALL properties** or

> Set different baselines and targets for **EACH property**

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 wher 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

Set different baselines and targets for each property

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

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

ℹ 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/m²)	2.01	2.15	1.50	1.65
Site EUI (GJ/m²)	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 CO2e)	544.0	598.2	417.8	458.7

Save Baselines & Target Cancel

ℹ 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.

ℹ 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.

ieso
Connecting Today.
Powering Tomorrow.

SAVE ON ENERGY
POWER WHAT'S NEXT

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

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

MyPortfolio – custom download

For a specific property

OR

Reporting tab - analyze progress and performance

Choose from preset chart & graph options

View and use standard reports
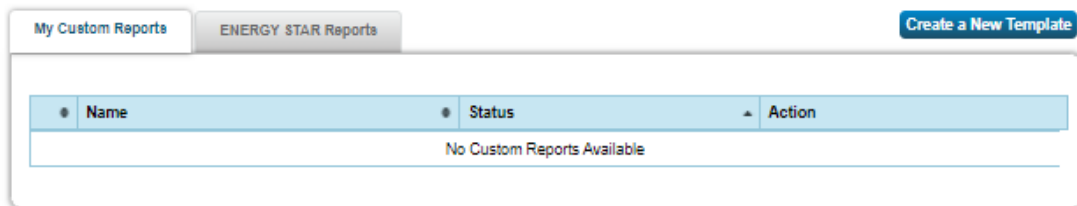
View and use custom report templates

View and download performance documents in PDF

generate custom report templates in Excel

Reporting tab – my custom reports

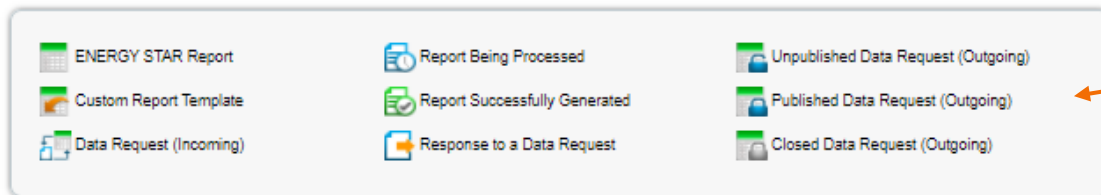Create a new report template to:

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

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.
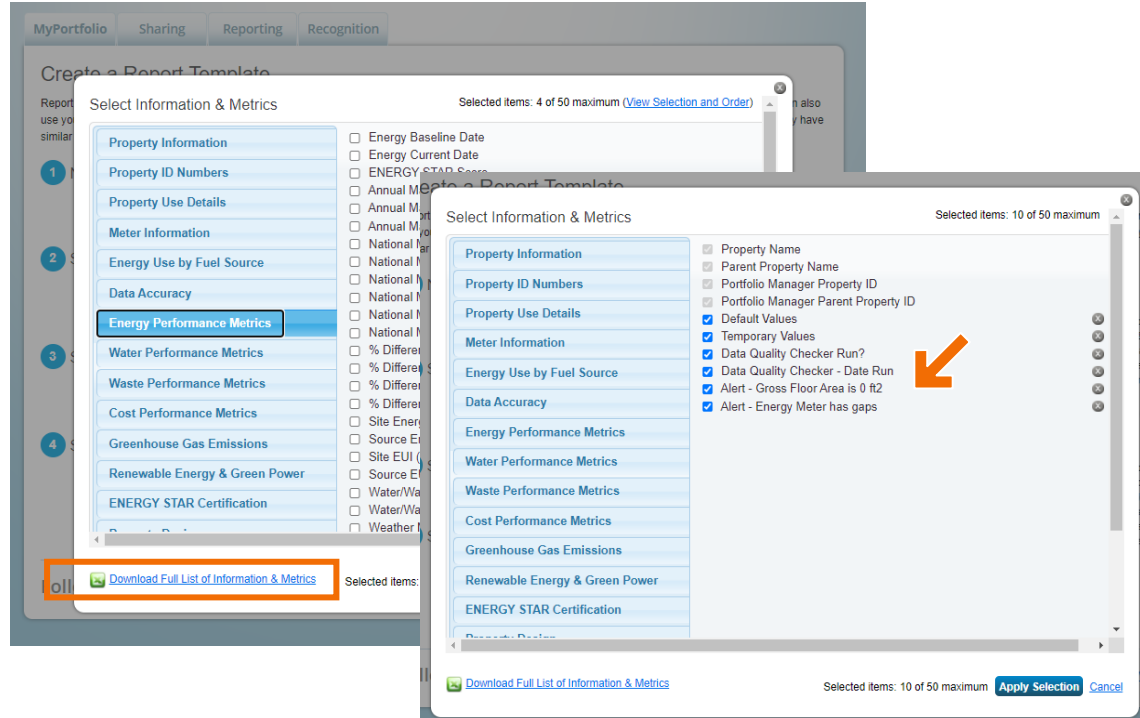
Property(ies):

- One
- Multiple
- All

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

2 **Step 2** – View or Download the report

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.

Questions?

Feel free to contact me at
mpadvaiskas@bpa.ca

Stay connected with tools and resources

- Virtual one-on-one coaching: <u>post-webinar support intake form</u> for tailored support for organizations to manage energy resources effectively

- Monthly bulletin: <u>sign up</u> to receive monthly training updates on all Save on Energy training and support, new tools and resources

- <u>Live training calendar</u>: visit this page to easily register for upcoming events and workshops

- <u>Training and support webpage:</u> visit this page to access all published training and support materials

Thank you!

SaveOnEnergy.ca/Training-and-Support

trainingandsupport@ieso.ca

𝕏   @SaveOnEnergyOnt

[f]   facebook.com/SaveOnEnergyOntario

[in]   linkedin.com/showcase/
SaveOnEnergy-Ontario

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

ieso
Connecting Today.
Powering Tomorrow.

SAVE ON ENERGY
POWER WHAT'S NEXT