PORTFOLIO MANAGER GUIDE

This guide will help you through the process of preparing your building profile and submitting your performance metrics to Efficiency Nova Scotia using ENERGY STAR® Portfolio Manger.

If you require additional support or have questions about the information provided in this document, please contact: nsbenchmarking@efficiencyns.ca

STEP 1 : Create a Portfolio Manager Account

Go to the Portfolio Manager log-in page (https://portfoliomanager.energystar.gov/pm/login.html) and click **"Create a New Account."** You will be asked to enter some information related to you and/or your organization. Once created, you will receive an email from ENERGY STAR® containing a link to activate your account.

STEP 2 : Collect Your Building's Data

Before entering your data into Portfolio Manager, you will need to gather some information on your property. Different property types may require different information. A complete list of data required for your building can be found by entering your country and property type on the Portfolio Manager Data Collection Worksheet page. You can also generate a Microsoft Word or PDF document to help you or your team collect this data.

All property types will require the following information:

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

Properties eligible for ENERGY STAR® certification may require additional information. View property types eligible for ENERGY STAR® scores here. New property types are introduced on a progressive basis.

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STEP 3 – Create Your Property in Portfolio Manager

After logging in to your Portfolio Manager account you can create your property by clicking **"Add a Property"** on the *My Portfolio* tab. You will be asked to select your property type, building(s) layout(s), and construction status. When selecting your property type, make sure to choose the type that best reflects the activity in the majority of your building. You will want to add as few property types as possible. Please review the list of exceptions. When you are satisfied with your choice, click **"Get Started!"**

> **NOTE:**
> As you progress through the online form, you may notice blue text. Hover your mouse over these areas to view a definition or click on the links to take you to pages with additional information.

This will prompt you to enter the property data that you collected in the previous step. Enter the Basic Property Information (being mindful to check any applicable boxes at the bottom of the page before continuing) and then enter your Building Use Details. You may also add additional building uses if you feel it is necessary.

> **NOTE:**
> Add as few property types as possible. There are four exceptions to this rule:
>
> (i)   If the Property Use can get an ENERGY STAR® score
>
> (ii)   If the Property Use accounts for more than 25% of the property's GFA
>
> (iii)   If it is vacant space within an Office or Medical Office Building and is at least 10% of GFA
>
> (iv)   If the Weekly Operating Hours differ by more than 10% for the same Property Use AND that Property Use can get a score (e.g., two office tenants with hours differing by more than 10%)
>
> For more information, visit the **Portfolio Manager FAQs**

HOW TO VIDEO: How to Set up a Property in Portfolio Manager

STEP 4 – Enter Your Consumption Details

You can add your energy, water, waste and materials consumption details in much the same way. Click on the property you want to enter usage details on from the *My Portfolio* tab, then select the tab with the consumption type you would like to enter – **"Energy," "Water,"** or **"Waste & Materials."**

Click the **"Add a Meter"** button. You will now be asked to provide details on the meter(s) you are adding. First, you will need to indicate what type of meter you are adding and how many meters exist. Click **"Get Started!"** to continue.

You will now be asked to enter the units and active date for your energy meters. Make sure to double check that the units of measurement selected here match the units of measurement on your utility bills or your performance metrics will not be calculated accurately.

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If this meter reflects a bulk fuel purchase for an energy meter (such as oil or propane), select the **"Enter as Delivery?"** checkbox.

Continue by clicking **"Create Meters."**

There are two ways you can enter your consumption data to your property:

4a) Manual Entry

For manual entry, click **"Add Another Entry"** under each meter and enter your billing data. Check **"Estimation"** if you are not including measured data for the entry. You may also choose to record cost here, too. For year 1 of this pilot you must add entries for the entire 2019 year at minimum. Once you are finished adding entries, click **"Continue."**

Select the boxes of the meters that make up the total property's energy, water, or waste and materials consumption on the *Select Meters to Include in Metrics* page. Click **"Apply Selections."**

4b) Spreadsheet Upload

To upload a spreadsheet with your consumption data, you will first need to download the template provided by Portfolio Manager. Look for the **"spreadsheet template"** link found underneath the meter entry you just created. This template will be different depending on the fuel type of the meter.

Populate the template with your billing data, being sure to fill in all required columns, and save this template to your computer. For year 1 of this pilot you must add entries for the entire 2019 year at minimum.

On the meter entry page, select your completed template from your computer and click **"Upload."**

Select the boxes of the meters that make up the total property's energy, water, or waste and materials consumption on the *Select Meters to Include in Metrics* page. Click **"Apply Selections."**

You have now completed your property's model!

HOW TO VIDEO: How to set up Energy, Water, and Waste Meters in Portfolio Manager

STEP 5: Check for Possible Data Errors

Once you've entered your data, Portfolio Manager has a tool to help you check for errors in your property's model.

From the *Summary* tab of each property, you can run a simple verification that compares your data with typical values by clicking **"Check for Possible Errors."** This will help you identify energy values and property use details that are unusual given your building's use. It'll also help you identify possible typos, incorrect meter readings, missing information, incorrect units of measure, and other common data entry problems. Make sure to select a timeframe that includes all of your 2019 data.

After addressing any flags that come up, re-run the data checking tool to ensure all flags are resolved. For help resolving flags you can visit the Portfolio Manager FAQs.

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STEP 6: Submit your Property Data

You are now ready to submit your data to Efficiency Nova Scotia.

For our first year, the data request link can be found here. Provide details on what building(s) you would like to submit and click **"Generate Response Preview."** All your buildings can be submitted at once or at different times.

You will be taken to your Reporting tab within your Portfolio Manager account. You will have a new data request report labeled **"Data Request: Efficiency Nova Scotia Energy Benchmarking Pilot - Data Request - Year 1."** From the drop-down menu beside this report you will have the option to:

- Edit Properties and Timeframe – if you need to update your data request response.

- Preview Response or Download Preview in Excel – if you want to review your data before sending it to Efficiency Nova Scotia.

- Generate an Updated Response – if you make changes to your property or properties after generating the report and want to include the most up-to-date data in your response.

- Send Response – if you are ready to submit your data to Efficiency Nova Scotia.

- Delete Response – if you want to remove the data request from your reporting tab.

Once you are satisfied with your data, select **"Send Response"** from the dropdown menu. You will be asked to E-sign to confirm your response.

HOW TO VIDEO: How to Respond to a Data Request in Portfolio Manager

ADDITIONAL RESOURCES:

(1) ENERGY STAR®'s Portfolio Manager Training Page -
https://www.energystar.gov/buildings/training/training

This includes:
- Live, online training and webinars
- Recorded training
- Slide library
- Portfolio Manager demonstration videos
- Portfolio Manager "How-to" documents
- Portfolio Manager reference documents

(2) ENERGY STAR®'s Portfolio Manager FAQs -
https://portfoliomanager.zendesk.com/hc/en-us

(3) Natural Resources Canada – Benchmarking for Buildings in Canada FAQs -
https://www.nrcan.gc.ca/energy-efficiency/energy-star-canada/benchmarking-frequently-asked-questions/3787

You can also contact Efficiency Nova Scotia at NSBenchmarking@efficiencyns.ca if you have any questions or would like additional support.

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