

# **Submitting Data through Portfolio Manager for Ontario's Energy and Water Reporting and Benchmarking Initiative**

August 2020

Ministry of Energy, Northern Development and Mines  
Version 7.1

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Similarly, if you need accessibility assistance using Portfolio Manager, please contact us.

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## About Ontario's Energy and Water Reporting and Benchmarking (EWRB) Initiative

Energy and water usage can represent some of the largest operating costs in your building, but Ontario's Energy and Water Reporting and Benchmarking (EWRB) initiative can help you:

- Save money by tracking your energy and water usage
- Identify energy and water efficiency opportunities
- Compare your building's performance to similar buildings

Under the [Reporting of Energy Consumption and Water Use regulation](#), if a building is 50,000 square feet or larger, the owner needs to report the building's energy and water use once a year to the Ministry of Energy, Northern Development and Mines. The initiative is being phased in as follows:

- Buildings 100,000 square feet and larger must start reporting by **July 1, 2019**.
- Buildings 50,000 square feet and larger must start reporting by **July 1, 2020**.

## The Portfolio Manager Guide and Other Resources

This document will guide you through the process of entering your energy and water consumption data into Portfolio Manager specifically for EWRB reporting.

On the next page, there is a reporting checklist that describes the major steps to reporting.

**Here are some other resources that may help you with future questions about reporting:**

- The [EWRB homepage](#) provides an overview of the initiative and reporting requirements
- The [Guide to Energy and Water Reporting](#) provides detail on the EWRB reporting steps and requirements, including building types, collecting usage data and exemptions
- The [Portfolio Manager training website](#) provides training content, demonstration videos and how-to FAQs on a wide variety of Portfolio Manager features

## Stay informed

The best way to stay informed about EWRB is to update your organization's EWRB Reporting Lead contact information. The EWRB reporting lead is the person who will receive EWRB emails for each of the buildings which a corporation owns. You can update the information any time the contact information for your corporation's reporting lead changes.

To update your EWRB Reporting Lead contact information, please complete this [form](#).

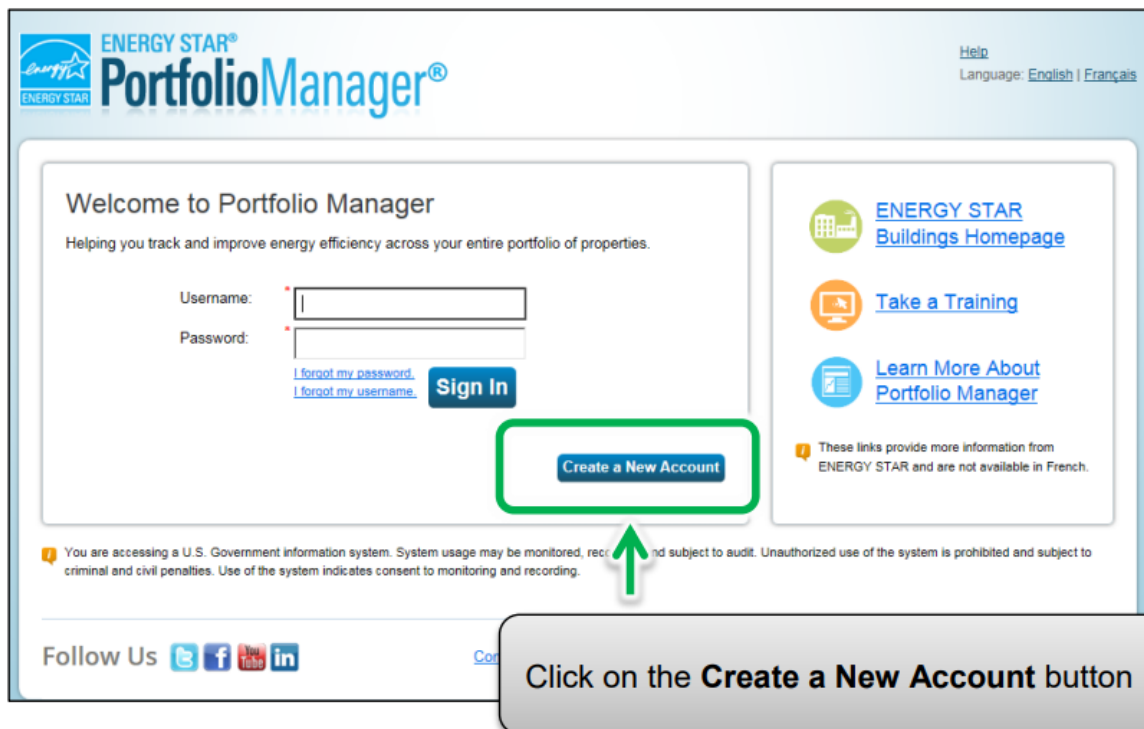
## Contact us

If you have a question, please contact **EWRB Support** at 1-844-274-0689 or [ewrbsupport@ontario.ca](mailto:ewrbsupport@ontario.ca).


# 1 – Creating a Portfolio Manager Account

The following are the steps to create a Portfolio Manager account.

1. Open your web browser and go to the Portfolio Manager log-in page at <https://portfoliomanager.energystar.gov/pm/login.html>.
2. Click on the **Create a New Account** button.



- The screen will reload to show the **Create an Account** page. Enter the required information. Fields marked with a red asterisk are mandatory.

 **ENERGY STAR®**  
**PortfolioManager®**

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

Create an Account

Already have an account? [Sign In Here](#)

Accessing Your Account

Username: \*

✓ Name Available!

Password: \*

✓ Secure

Confirm Password: \*

✓ Passwords Match

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

About Yourself

First Name: \*

Last Name: \*

Getting Started

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

Accounts for Organizations

If you are creating an account that you intend to use as your organization's account, then you may want to consider entering your organization name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization.

4. Under the **About Yourself** section, for the **Reporting Units** field, select the **Conventional EPA Units (e.g., kBtu/ft<sup>2</sup>)** option.

The screenshot shows a form titled "About Yourself" with the following fields: First Name (John), Last Name (Smith), Job Title (ACME Property Administrator), Email (jsmith@acme.ca), Confirm Email (jsmith@acme.ca), Phone (4165551234), Country (Canada), and Language (English). A green box highlights the "Reporting Units" section, which contains two radio button options: "Conventional EPA Units (e.g., kBtu/ft<sup>2</sup>)" (selected) and "Metric Units (e.g., GJ/m<sup>2</sup>)". A grey callout box with a green arrow points to the "Conventional EPA Units" option, containing the text: "Select the **Conventional EPA Units (e.g., kBtu/ft<sup>2</sup>)** option".

5. For the **Searchability in Portfolio Manager** section of the form, select the **Yes** option.

The screenshot shows a form section titled "Searchability in Portfolio Manager" with a question: "Can other people search for you and send you a [connection request](#)?" and two radio button options: "Yes" (selected) and "No". A green box highlights the "Yes" option. A grey callout box with a green arrow points to the "Yes" option, containing the text: "Select the **Yes** option".



6. Once you have entered all the requested information, click on the **Create Account** button to create the account.
7. You will receive an email message from Energy Star to activate your new Portfolio Manager account. Within 24 hours, follow the instructions in the email to complete the account creation process.

## 2 – Entering Data

Once you have created an account and are logged in, you can start adding your data. There are three different methods to add your data, listed below. This guide shows you how to enter data using the web form.

1. **Web Form:** This method allows you to enter your data manually — one building at a time — both for initial data entry and data updates.
2. **Microsoft Excel** - If you're already using Excel to track data or you have several buildings, you may want to import your data straight from Excel. This method is faster for large numbers of buildings.

This method is not recommended unless you have a good understanding of Excel. **This method does not automatically cover all the data requirements needed to report for EWRB**, so you will need to first use the web form method described above for at least one property to understand which fields are required for EWRB.

3. **Web Services** - Many leading energy services companies exchange data directly with Portfolio Manager. These companies can upload your energy and water data for you. If you decide to use web services provided by a third party, you are responsible for ensuring the quality and accuracy of the data submitted.

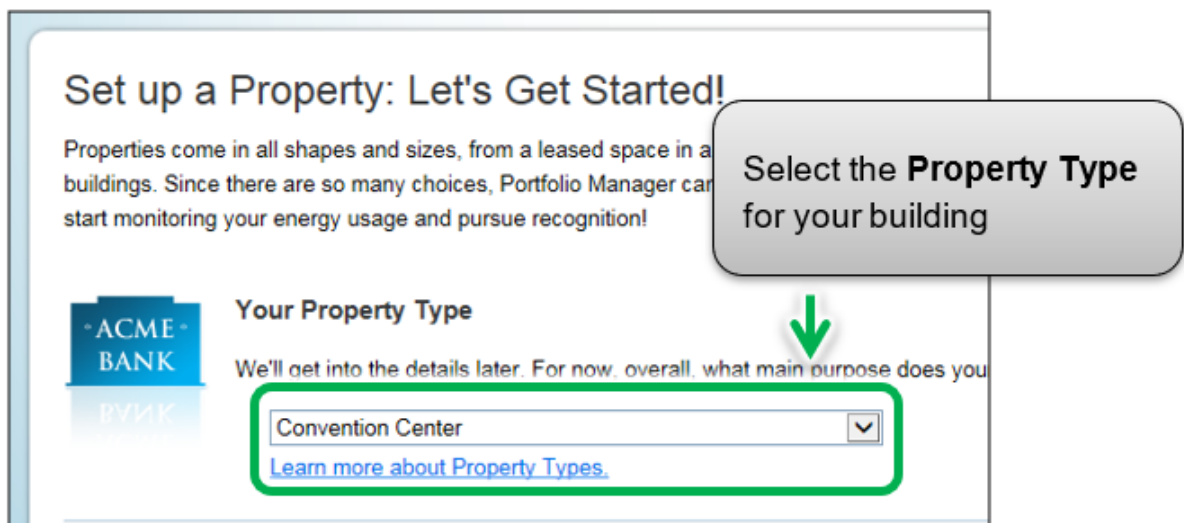
## 2.1 – Adding and Setting Up a Property

The following are the steps to add and set up a property.

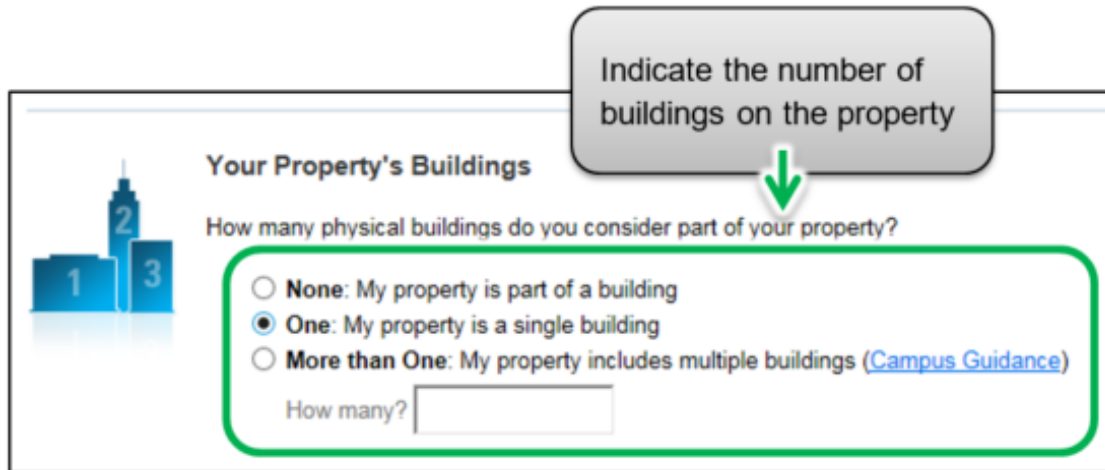
1. Click on the **Add a Property** button under the **MyPortfolio** tab.



2. The screen will reload to show the **Set up a Property** page. Select the property's primary function from the **Your Property Type** drop-down list.

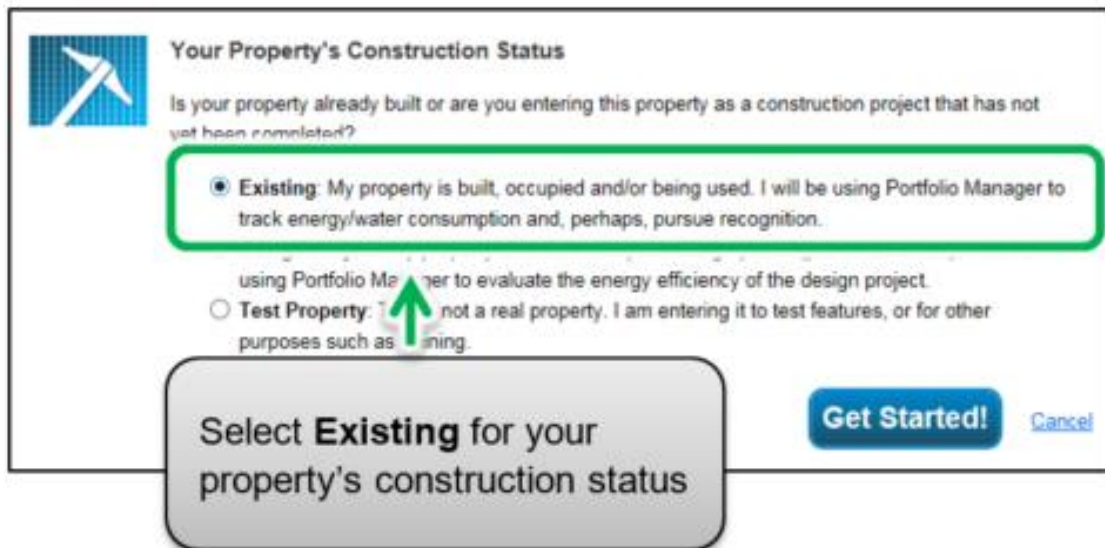


3. In the **Your Property's Buildings** section, indicate the number of buildings included on the property.



The screenshot shows the 'Your Property's Buildings' section of a form. On the left is an icon of three buildings labeled 1, 2, and 3. The title 'Your Property's Buildings' is at the top. Below it is the question 'How many physical buildings do you consider part of your property?'. A callout box with a green arrow points to the question. The options are:   
☐ None: My property is part of a building   
☒ One: My property is a single building   
☐ More than One: My property includes multiple buildings ([Campus Guidance](#))   
Below the options is a text input field labeled 'How many?'. The entire form area is enclosed in a green border.

4. In the **Your Property's Construction Status** section, select **Existing**.



The screenshot shows the 'Your Property's Construction Status' section of a form. On the left is an icon of a hammer and pencil. The title 'Your Property's Construction Status' is at the top. Below it is the question 'Is your property already built or are you entering this property as a construction project that has not yet been completed?'. A callout box with a green arrow points to the 'Existing' option. The options are:   
☒ Existing: My property is built, occupied and/or being used. I will be using Portfolio Manager to track energy/water consumption and, perhaps, pursue recognition.   
☐ Test Property: I am entering this property as a test property. I am entering it to test features, or for other purposes such as training.   
At the bottom, there is a large callout box that says 'Select **Existing** for your property's construction status'. To the right of this box are two buttons: 'Get Started!' and 'Cancel'.

5. Click on the **Get Started!** button to confirm your choices.



The screenshot shows a web form titled "Your Property's Construction Status" with a blue icon of a hammer and pickaxe. The form asks, "Is your property already built or are you entering this property as a construction project that has not yet been completed?" and provides three radio button options: "Existing" (selected), "Design Project", and "Test Property". Below the form, a grey callout box contains the text "Click on the **Get Started!** button" with a green arrow pointing to a blue "Get Started!" button. A small "cancel" link is visible next to the button.

**Your Property's Construction Status**

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

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

Click on the **Get Started!** button


**Get Started!** [cancel](#)

6. The screen will reload to show the **Basic Property Information** page. Enter the required information. Fields marked with a red asterisk are mandatory. Use numeric values only with no commas when entering Gross Floor Area data.

**Note:** Gross Floor Area is different than Gross Leasable Area. The EWRB initiative requires property owners to report a building's Gross Floor Area.

See more on calculating Gross Floor Area on the [EWRB Guide page](#).

Set Up a Property: Basic Property Info

Tell us a little bit more about your property, including a name that you will use to  up your property and its address.

Fields marked with a red asterisk are mandatory

About Your Property

Name: \*

Country: \*

Street Address: \*

City/Municipality: \*

State/Province: \*

Postal Code: \*

Year Built: \*

Gross Floor Area: \*   ☐ Temporary Value

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

- Once you have entered all the necessary information, click on the **Continue** button to proceed to the next page.
- The screen will reload to show the **How is it used?** page. If your property has multiple building uses, select the desired type of use option from the **Add Another Type of Use** drop-down list and click on the **Add** button. For example, a property may have an “office” and a “restaurant/bar” on the same property.

**Set up a Property: How is it used?**

Based on what you've told us so far, Portfolio Manager has set up your property. Fill in the tables below to provide more detailed information on how your property is used.

Basic Information

<b>Name:</b>	Brambleberry Towers	<b>Country:</b>	CA
<b>Property Type:</b>	Office	<b>Address:</b>	55 Elm Street Sudbury, ON P3C 1S2 <a href="#">Map It</a>
<b>Year Built:</b>	1992		
<b>Property consists of:</b>	1 building		

[Edit](#)

If applicable, select the additional **Type of Use** from the drop-down list and then click on the **Add** button

→

Restaurant/Bar [Add](#)

More Specifically? Restaurant

business activities. This includes administrative and professional offices.

9. Scroll to the next section of the page and enter all of the **Property Use Details** for each type of use:

**Gross Floor Area** – If you specified multiple building uses for your property, the combined **Gross Floor Area** for each type of use must be equal to the total **Gross Floor Area** that you specified for the overall property in step 6.

**Office Use** [Edit Name](#) [Delete](#)

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

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

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

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

[More on this rule.](#)

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	59,340 Sq. Ft.	1/1/1992	
★ Weekly Operating Hours	112 Use a default	1/1/2017	
★ Number of Workers on Main Shift	50 Use a default	1/1/2017	
★ Number of Computers	50 Use a default	1/1/2017	
★ Percent That Can Be Heated	50 % or more		
★ Percent That Can Be Cooled	50 % or more		

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

**Restaurant Use** [Edit Name](#) [Delete](#)

Restaurant refers to buildings used for preparation and sale of ready-to-eat food and beverages, but which do not fit in the fast food property type. Examples include fast casual, casual, and fine dining restaurants.

Gross Floor Area should include all space within the building(s), including kitchens, sales areas, dining areas, offices, staff break rooms, and storage areas. Gross Floor Area should not include any outdoor/interior seating areas, but the energy use of those indoor areas should be reported on your energy meters.

Property Use Detail	Value	Current As Of	Temporary Value
Gross Floor Area	5,000 Sq. Ft.	01/01/1992	
Weekly Operating Hours	98	01/01/2017	

**Total combined Gross Floor Area must equal total Gross Floor Area specified for the overall property**

- A building may include more than one property use type (e.g., retail / multi-residential) and if so you will need to indicate the various use types in your building and provide the gross floor area for each use type in your building.
- Weekly Operating Hours, Number of Workers on Main Shift, Number of Computers, Percent That Can Be Heated, and Percent That Can Be Cooled** are not required under the EWRB initiative. If you choose not to enter these, Portfolio Manager will automatically assign default values for the building.



10. Scroll to the **Parking Use** section and, if applicable, enter the Parking Use **Property Use Details**. Portfolio Manager tracks area entered in the **Parking Use** section separately from property **Gross Floor Area**, so you should **NOT** include parking area in the total Gross Floor Area for the overall property.

Property Use Detail	Value	Current As Of	Temporary Value
Open Parking Lot Size	<input type="text"/> Sq. Ft. ▼	01/01/2018	<input type="checkbox"/>
Partially Enclosed Parking Garage Size	<input type="text"/> Sq. Ft. ▼	01/01/2018	<input type="checkbox"/>
Completely Enclosed Parking Garage Size	<input type="text"/> Sq. Ft. ▼	01/01/2018	<input type="checkbox"/>
Supplemental Heating	<input type="text"/> <input type="checkbox"/> Use a default	01/01/2018	<input type="checkbox"/>

If applicable, enter property use details in the **Parking Use** section

11. Click on the **Add Property** button at the bottom of the page to confirm your changes. The screen will reload to show the **Summary** tab on the property's profile page.

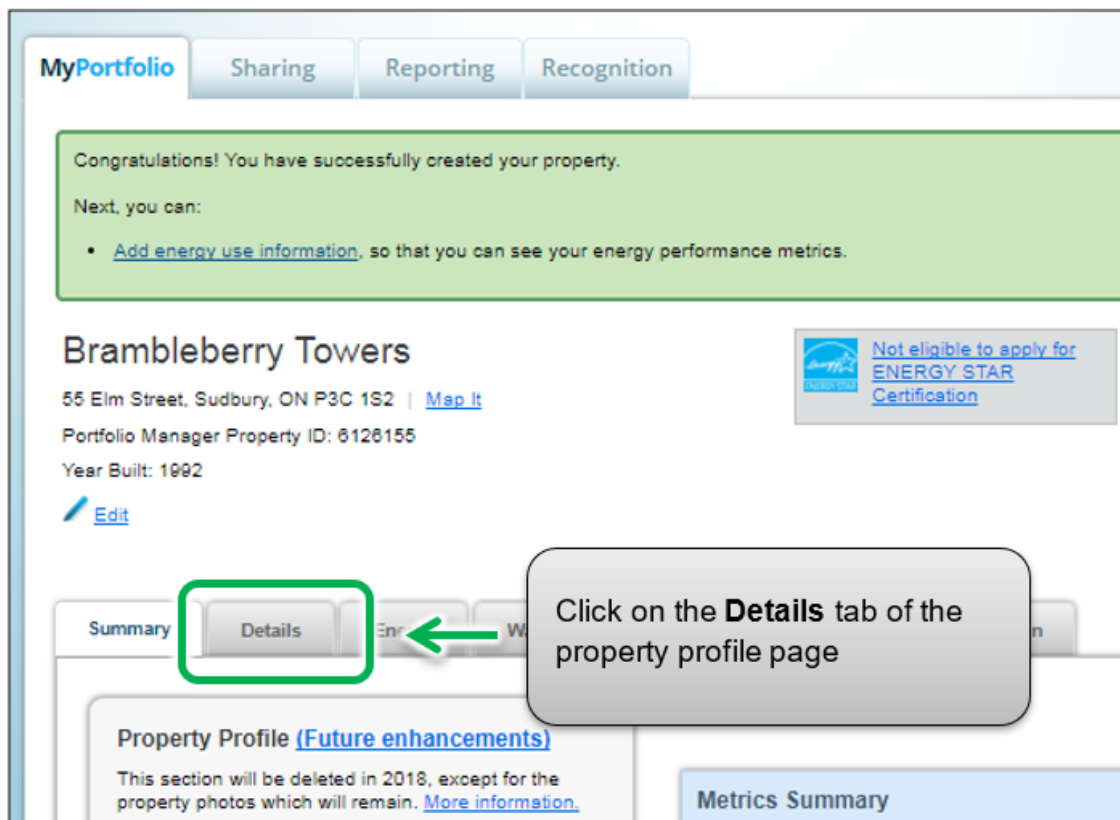
## 2.2 – Adding Your Building's EWRB ID

Once you have completed adding and setting up a property in Portfolio Manager, you will be presented with the property's profile page. From this page you can view summary information, enter the property's details, energy and water usage, and more.

To successfully submit your report, **it is essential that you enter your building's Ontario EWRB ID information in the Details tab of the property's profile page.**

**The following are the steps to add your building's EWRB ID to the property profile.**

1. Continuing from where we left off in the previous section, click on the **Details** tab of the property profile page.



- The page will refresh to show the **Details** section. Scroll down the page to view the **Unique Identifiers (IDs)** section and click on the **Edit** button found in the section.

The screenshot shows a software interface with a top navigation bar containing tabs: Summary, Details (selected), Energy, Water, Waste & Materials, Goals, and Design. The main content area is divided into two columns. The left column has a 'Basic Information' section with fields for Construction Status, Property GFA, and Occupancy, followed by a 'Unique Identifiers (IDs)' section. The 'Unique Identifiers (IDs)' section contains fields for Portfolio Manager ID, Custom IDs, and Standard IDs, along with an explanatory note and an 'Edit' button. A green rounded rectangle highlights the 'Unique Identifiers (IDs)' section, and a green arrow points from a text box to the 'Edit' button. The right column has a 'Property Uses and Use Details' section with a table of property uses, a 'Property GFA by Use' pie chart, and a 'Property GFA (Buildings)' and 'Property GFA (Parking)' summary. A text box at the bottom right says 'Click on the **Edit** button'.

**Basic Information**

**Construction Status:**  
Test property that is one single building

**Property GFA - Self-Reported:**  
64,340 Sq. Ft.

**Occupancy:**  
80%

**Edit**

**Unique Identifiers (IDs)**

**Portfolio Manager ID:**  
6023547

**Custom IDs:** None

**Standard IDs:** None

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

**Edit**

**Property Uses and Use Details**

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

Name	Property Use Type	GFA
▶ Convention Center Use	Convention Center	50
▶ Restaurant Use	Restaurant	5

Property GFA (Buildings): 64,340  
Property GFA (Parking): 0

**Property GFA by Use**

Restaurant: 7.77 %

**Click on the **Edit** button**

3. The screen will reload to show the **Edit Property Identifiers (IDs)** page. Scroll to the **Standard IDs** box. From the Standard IDs drop-down list, select the **Ontario EWRB ID** option. In the “ID” field, enter the unique six-digit Ontario **EWRB ID** number for your property. For more information on getting the Ontario EWRB ID for your property, see page 7 of this document.



**Important: Your data will be rejected if you do not enter the correct Ontario EWRB ID for your property.**

**Standard IDs**

Standard IDs are those typically used as part of a data request by an organization (such as a State or local government, or LEED). If you know your property is going to be part of a data request, you may need to select and specify the relevant ID here.

**Standard ID(s):**

Ontario EWRB ID ▼ ID: 123456 [+ Add Another](#)

Select the **Ontario EWRB ID** option from the drop-down list, and then enter the **EWRB ID**. The number here is an example only.

4. Click on the **Save** button to confirm your changes and proceed to the next step.

## 2.3 – Adding Property Notes

The following are the steps to add property notes to the property profile.

1. Once you have entered your Ontario EWRB ID and saved your changes, you will be returned to the **Details** tab page. Scroll to the lower part of the page and locate the **Property Notes** section. Click in the **Property Notes** field and enter the legal name of the person or company that owns the property, then click on the **Save Notes** button just below the field to save your changes.

**Property Notes**  
Use the following area to keep notes on your property.

ACME Properties Inc.

Enter the legal name of the person or company that owns the property

**Save Notes**

Click on the **Save Notes** button to save your changes



3. The screen will reload to show the **Sources of Your Property's Energy** page. You will be presented with a list of energy source types – some are normally metered (e.g., electricity and natural gas) while others are often measured another way (e.g., propane and wood). Select all of the types that apply to your property. Depending on the type of meter selected, you will be prompted to select additional related options.

The screenshot shows a web form titled "Sources of Your Property's Energy" with a lightning bolt icon. The instruction reads: "What kind of **energy** do you want to track? Please select all that apply." The form contains a list of energy sources, each with a checkbox and, for some, a "How Many Meters?" input field. A green rounded rectangle highlights the "Electric" and "Natural Gas" sections. A grey callout box with a green arrow points to this section, containing the text: "Select all of the energy source types that apply to your property". At the bottom right, a blue "Get Started!" button is highlighted with a green rounded rectangle. A grey callout box with a green arrow points to this button, containing the text: "Click on the **Get Started!** Button to save your changes". A "Help" button is in the bottom left, and an "ancel" link is in the bottom right.

**Sources of Your Property's Energy**

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

☒ **Electric**

☒ purchased from the grid

How Many Meters?

☐ generated onsite with my own solar panels

☐ generated onsite with my own wind turbines

☒ **Natural Gas**

How Many Meters?

☐ Propane

☐ Fuel Oil (No. 2)

☐ Diesel

☐ District Steam

☐ District Hot Water

☐ District Chilled Water

☐ Fuel Oil (No. 4)

☐ Fuel Oil (No. 5 and No. 6)

☐ Coal (anthracite)

☐ Coal (bituminous)

☐ Coke

☐ Wood

☐ Kerosene

☐ Fuel Oil (No. 1)

☐ Other:

[Help](#)

**Get Started!** [ancel](#)

Select all of the energy source types that apply to your property

Click on the **Get Started!** Button to save your changes

4. Click on the **Get Started!** button and proceed to the next step.

- The page will reload to show the **About Your Meters** page with a table listing the meter types you selected in the previous step. Under the **Meter Name** column, click on the name for the first meter type listed and enter the desired label for the meter.

**About Your Meters for Brambleberry Towers**

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

**2 Energy Meters for Brambleberry Towers (click table to edit)**

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	En De
<input type="checkbox"/>	Natural Gas	Natural Gas				<input checked="" type="checkbox"/>		
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid				<input checked="" type="checkbox"/>		

Click on the name for the **Meter Name** field and enter the desired label for the meter

- Click the cell in the **Units** column. The fields for the meter will become active and you can select the same unit of measure for the meter as you have for your usage data. For example, for electricity, the most common unit of measure is kWh (kilowatt hours) and for natural gas, the most common unit of measure is m<sup>3</sup> (cubic meters).

<input type="checkbox"/>	Meter Name	Type	Units	Date Meter became Active	In Use?
<input type="checkbox"/>	Union Gas	Natural Gas	Cubic meters	12	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Electric Grid Meter	Electric - Grid			<input checked="" type="checkbox"/>

Select the unit of measure from the **Units** drop-down list



7. Under the **Date Meter became Active** column, click on the calendar icon and select the date the meter became active. Portfolio Manager will only allow you to enter usage data with dates later than the date the meter became active.

The screenshot shows a form with columns: Meter Name, Type, Other Type, Units, Date Meter became Active, In Use?, and Date Meter became Inactive. The 'Natural Gas' row is selected. A calendar pop-up for November 1992 is open, showing the date 11/02/1992. A green box highlights the calendar and the 'Date Meter became Active' field. A callout box says 'Select the date the meter became active' with an arrow pointing to the calendar.

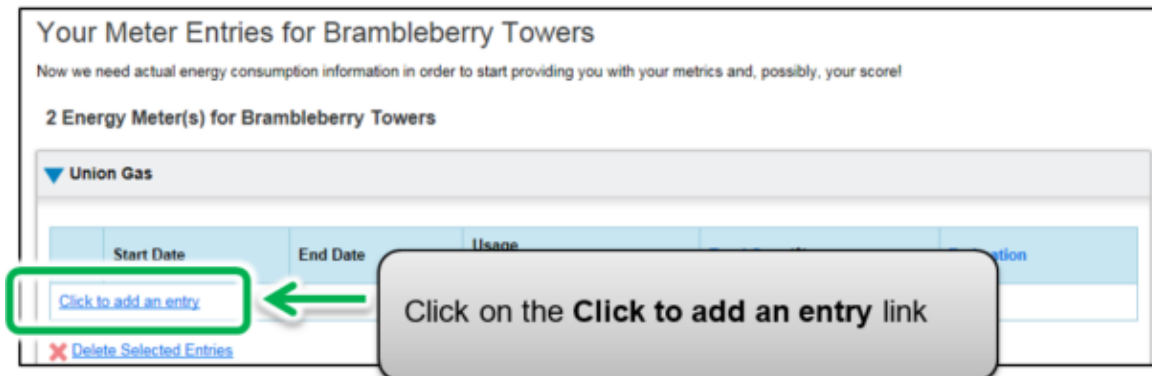
<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive
<input checked="" type="checkbox"/>	Natural Gas	Natural Gas		Cubic meters	11/02/1992	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	Electric - Grid	Electric - Grid		kWh (thousand Watt-hours)		<input type="checkbox"/>	

8. If you have specified more than one energy source/meter type for the property, repeat steps 5 through 7 for each type.
9. Once you have entered the necessary information for all meters, click the **Create Meters** button to confirm your changes and proceed to the next step.

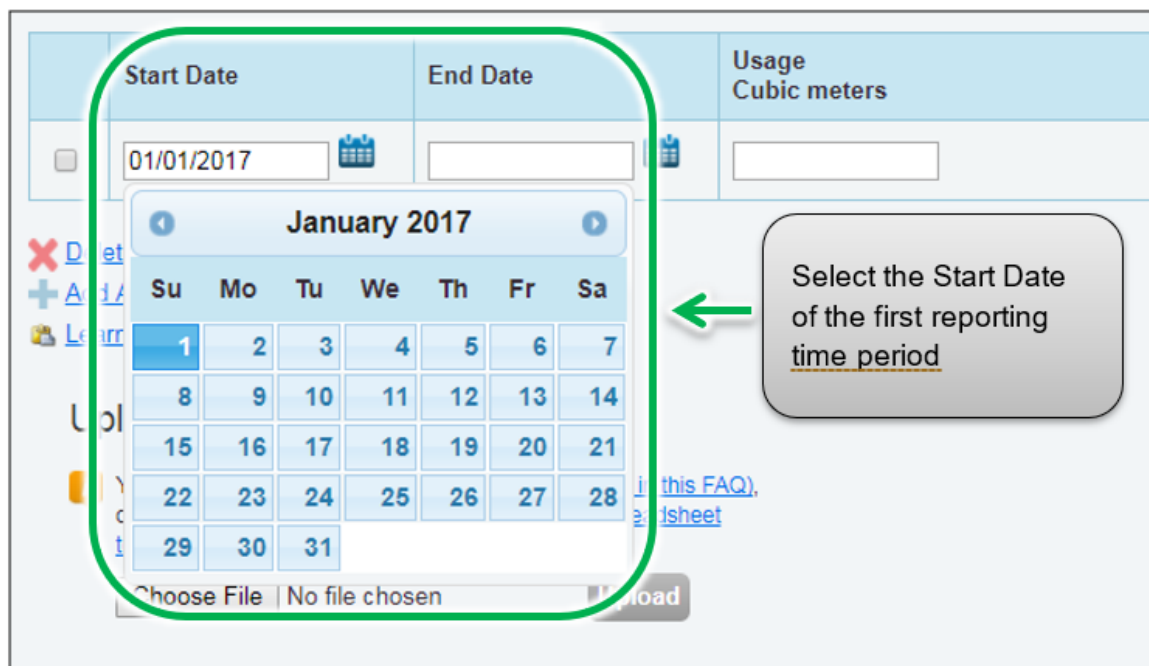
The screenshot shows the same form as before, but now with two rows: 'Union Gas' and 'Toronto Hydro'. The 'Date Meter became Active' field for both rows is filled with '11/02/1992'. The 'In Use?' checkbox is checked for both. A green box highlights the entire form. A callout box says 'Enter the information for all meters' with an arrow pointing to the form. Another callout box says 'Click on the Create Meters button' with an arrow pointing to the 'Create Meters' button.

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive	Enter as Delivery?
<input type="checkbox"/>	Union Gas	Natural Gas		Cubic meters	11/02/1992	<input checked="" type="checkbox"/>		<input type="checkbox"/>
<input type="checkbox"/>	Toronto Hydro	Electric - Grid		kWh (thousand Watt-hours)	11/02/1992	<input checked="" type="checkbox"/>		<input type="checkbox"/>

10. The screen will reload to show the **Your Meter Entries** page. In the section for the first meter, click on the **Click to add an entry** link.



11. Under the **Start Date** column, click on the calendar icon to select the start date for the first reporting time period for the meter.



**Note:** If you are unable to obtain meter consumption data that begins on January 1 and ends on December 31, you can enter data that includes consumption outside of the reporting year. Portfolio Manager will then prorate the consumption data.

**Example:** You need to report your energy consumption from January 1, 2018 to December 31, 2018 and your billing cycle ends on the 20<sup>th</sup> of every month.

- The first reporting time period you enter will have a Start Date of December 21, 2017 and an End Date of January 20, 2018.
- The second reporting time period will have a Start Date of January 21, 2018 and an End Date of February 20, 2018.
- The final reporting time period will have a Start Date of December 21, 2018 and an End Date of January 20, 2019 (for a total of 13 monthly entries).

12. Under the **End Date** column, click on the calendar icon to select the end date of the first reporting time period for the meter. Whenever possible, report your usage using the smallest available time periods. Portfolio Manager cannot weather-normalize usage data reported in periods longer than 65 days and will not be able to calculate your building's energy use intensity.

The screenshot shows a web interface for entering energy usage data. It features a table with columns: Start Date, End Date, and Usage (Cubic meters). The Start Date field contains '01/01/2017' and the End Date field contains '01/31/2017'. A calendar pop-up for January 2017 is displayed over the End Date field, with the 31st selected. To the left of the calendar, there are links: 'Delete Selected Entries' (with a red X icon), 'Add Another Entry' (with a blue plus icon), and 'Learn how to copy/paste' (with a document icon). A grey callout box with a green arrow points to the calendar and contains the text: 'Select the End Date of the first reporting time period for the meter'. Below the calendar is an 'Unload' button.

Start Date	End Date	Usage Cubic meters
01/01/2017	01/31/2017	

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

Select the End Date of the first reporting time period for the meter

Unload

13. Enter the consumption data for the selected reporting time period. If the building has not consumed energy at this meter or source during the time period, enter '0'.

	Start Date	End Date	Usage Cubic meters	Total Cost (\$)
<input type="checkbox"/>	1/31/2017	1/31/2017	5,603	



Enter consumption data

**Note:** You can also enter your cost information in the **Total Cost** information field, but the EWRB regulation does not require it and it will not be shared with the Ministry of Energy, Northern Development and Mines.

14. Click on the **Add Another Entry** and repeat steps 11 through 13 for each reporting time period until you have finished entering consumption data for the full year. Ensure that the **Start Date** of your new entry is the same day, or one day after, the **End Date** of the previous entry.

	Start Date	End Date	Usage Cubic meters
<input type="checkbox"/>	1/31/2017	1/31/2017	5,603
<input type="checkbox"/>	02/01/2017	02/28/2017	

[Delete Selected Entries](#)

[Add Another Entry](#)

[Learn how to copy/paste](#)

Click on the **Add Another Entry** link to enter additional reporting time periods

15. When you have completed entering consumption data for the full year in the section for the first meter, scroll to the section for the next meter (if you have more than one) and repeat steps 10 through 14 for each meter that makes up the property's energy use.

16. When you have entered all of the consumption data for all of the meters, click on the **Continue** button to proceed to the next step.

If you add more monthly entries at a later time, click on the **Save Bills** button when you have entered all of your usage data for the meter(s), then click on the name of your building at the top of the page to take you back to your building's Summary tab.

17. The page will reload to show the **Select Energy Meters to Include in Metrics** page. Select all the meters that make up the property's energy consumption and click on the **Apply Selections** button to complete the process and continue to the next section.

The screenshot shows a web interface titled "Select Energy Meters to Include in Metrics". It includes a "Summary" sidebar on the left with a large number "2" and text: "Meters representing the total energy consumption for Brambleberry Towers (a single building)". Below this is an "About Sub-meters" section with an information icon and explanatory text. The main area, titled "Energy Meters", contains a table with columns "Name", "Meter ID", and "Type". Two meters are listed: "Union Gas" (32780864, Natural Gas) and "Toronto Hydro" (32780865, Electric - Grid), both with checked selection boxes. Below the table, a text prompt asks to confirm the total of 2 meters represents the total energy consumption for the building, with two radio button options. The first option is selected. At the bottom right is a blue "Apply Selections" button. A green arrow points from a grey instruction box at the bottom left to the "Apply Selections" button. Another green arrow points from the "Apply Selections" button to a small "xcl" icon.

**Select Energy Meters to Include in Metrics**

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

**Summary**

**2**

Meters representing the total energy consumption for [Brambleberry Towers](#) (a single building).

**About Sub-meters**

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

**Energy Meters**

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

<input type="checkbox"/>	Name	Meter ID	Type
<input checked="" type="checkbox"/>	<a href="#">Union Gas</a>	32780864	Natural Gas
<input checked="" type="checkbox"/>	<a href="#">Toronto Hydro</a>	32780865	Electric - Grid

Total of 2 meter(s). Tell us what this represents:

- ☒ These meter(s) account for the total energy consumption for [Brambleberry Towers](#) (a single building).
- ☐ These meter(s) do not account for the total energy consumption for [Brambleberry Towers](#) (a single building).

Select all the meters that make up the property's energy consumption and click on the **Apply Selections** button

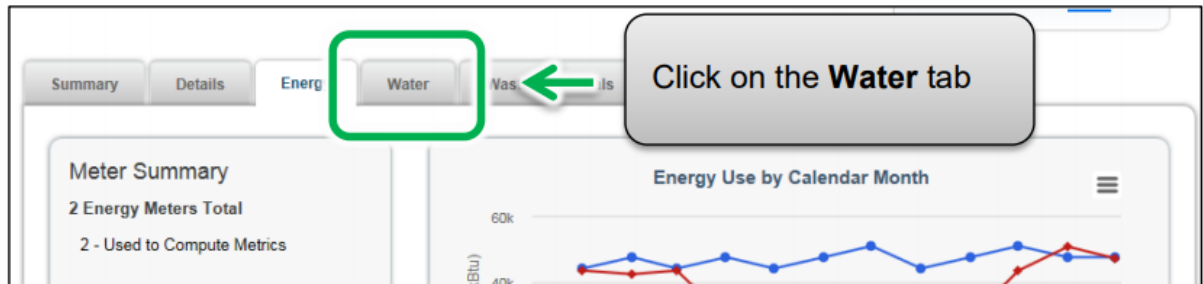
**Apply Selections**

xcl

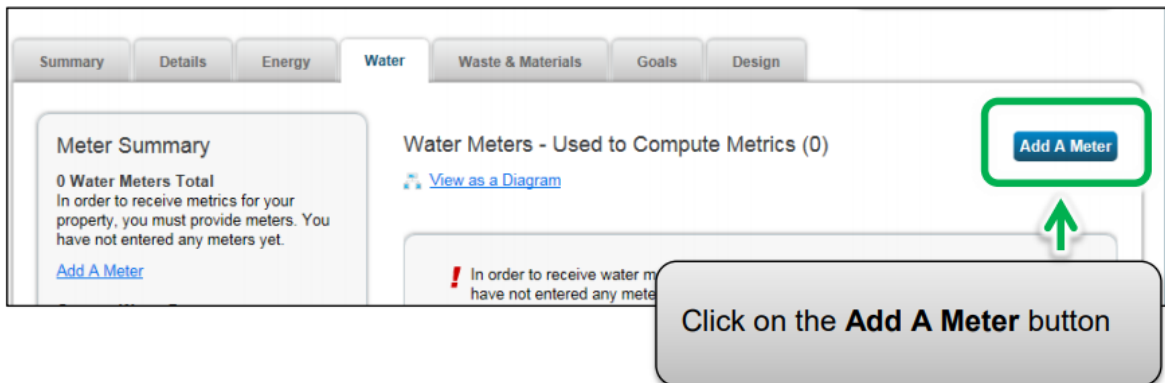
## 2.5 – Adding Water Meters and Water Consumption Data

The following are the steps to add water usage to the property profile.

1. Continuing from the previous section, scroll to the top of the property profile page and click on the **Water** tab.



2. The page will reload to show the **Water** tab page. In the top right corner of the tab page, click on the **Add A Meter** button.



3. The screen will reload to show the **Your Property's Water Usage** page. You will be presented with a list of potential meter types. Select all of the types that apply to your property. Depending on the type of meter selected, you will be prompted to select additional related options.

The screenshot shows a web form titled "Your Property's Water Usage" with a water drop icon. The instruction reads: "What kind of water do you want to track? Please select all that apply". The form contains several checkboxes: "Municipally Supplied Potable Water" (checked), "Indoor", "Outdoor", "Mixed Indoor/Outdoor" (checked), "Municipally Supplied Reclaimed Water", "Well Water", and "Other:". Below the "Mixed Indoor/Outdoor" checkbox is a text input field labeled "How Many Meters?" with the value "1". A green rounded rectangle highlights the "Mixed Indoor/Outdoor" section, with a green arrow pointing to it from a callout box that says "Select all of the meter types that apply to your property". At the bottom right is a blue "Get Started!" button with a green rounded rectangle around it and a green arrow pointing to it from a callout box that says "Click on the **Get Started!** button to confirm your changes". A small "cancel" link is visible next to the button.

**Your Property's Water Usage**

What kind of water do you want to track? Please select all that apply

☒ Municipally Supplied Potable Water

☐ Indoor

☐ Outdoor

☒ Mixed Indoor/Outdoor

How Many Meters?

☐ Municipally Supplied Reclaimed Water

☐ Well Water

☐ Other:

**Get Started!** [cancel](#)

Select all of the meter types that apply to your property

Click on the **Get Started!** button to confirm your changes

4. Click on the **Get Started!** button and proceed to the next step.

5. The page will reload to show the **About Your Meters** page with a table listing the meter types you selected in the previous step. Under the **Meter Name** column, click on the name for the first meter type listed and enter the desired label for the meter.

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active
<input type="checkbox"/>	Greater Sudbury	Potable Indoor ▼			
<input type="checkbox"/>	Potable Outdoor Meter	Potable Outdoor			

Click on the name for the **Meter Name** field and enter the desired label for the meter

6. Click the cell in the **Units** column. The fields for the meter will become active and you can select your preferred unit of measure for the meter type.

<input type="checkbox"/>	Meter Name	Type	Other Type	Units	Date Meter became Active
<input type="checkbox"/>	Greater Sudbury	Potable Indoor ▼		Cubic meters ▼	
<input type="checkbox"/>	Potable Outdoor Meter	Potable Outdoor			

Select the unit of measure from the **Units** drop-down list



7. Under the **Date Meter became Active** column, click on the calendar icon and select the date the meter became active. Portfolio Manager will only allow you to enter usage data with dates later than the date the meter became active.

The screenshot shows a table with the following columns: Meter Name, Type, Other Type, Units, Date Meter became Active, In Use?, and Date Meter became Inactive. The first row has 'Greater Sudbury' as the meter name, 'Potable Indoor' as the type, and 'Cubic meters' as the units. The 'Date Meter became Active' column shows '01/01/2017' with a calendar icon. A calendar pop-up for January 2017 is open, showing the date '01/01/2017' selected. A callout box with the text 'Select the date the meter became active' points to the calendar. Below the table, there are links for 'Delete Selected Entries' and 'Add Another Entry', and a 'Back' button.

Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive
Greater Sudbury	Potable Indoor		Cubic meters	01/01/2017	<input checked="" type="checkbox"/>	
Potable Outdoor Meter	Potable Outdoor					

Callout: Select the date the meter became active

Buttons: Delete Selected Entries, Add Another Entry, Back

8. If you have specified more than one water meter for the property, repeat steps 5 through 7 for each meter.
9. Once you have entered the necessary information, for all meters, click the **Create Meters** button to confirm your changes and proceed to the next step.

The screenshot shows a table with the following columns: Meter Name, Type, Other Type, Units, Date Meter became Active, In Use?, and Date Meter became Inactive. The first row has 'Greater Sudbury Utilities' as the meter name, 'Potable Indoor' as the type, and 'Cubic meters' as the units. The 'Date Meter became Active' column shows '01/01/2017'. The second row has 'Fountain' as the meter name, 'Potable Outdoor' as the type, and 'Cubic meters' as the units. The 'Date Meter became Active' column shows '01/01/2017'. Below the table, there is a link for 'Add Another Entry' and a 'Create Meters' button. A callout box with the text 'Enter the information for all meters' points to the 'Add Another Entry' link. Another callout box with the text 'Click on the Create Meters button' points to the 'Create Meters' button.

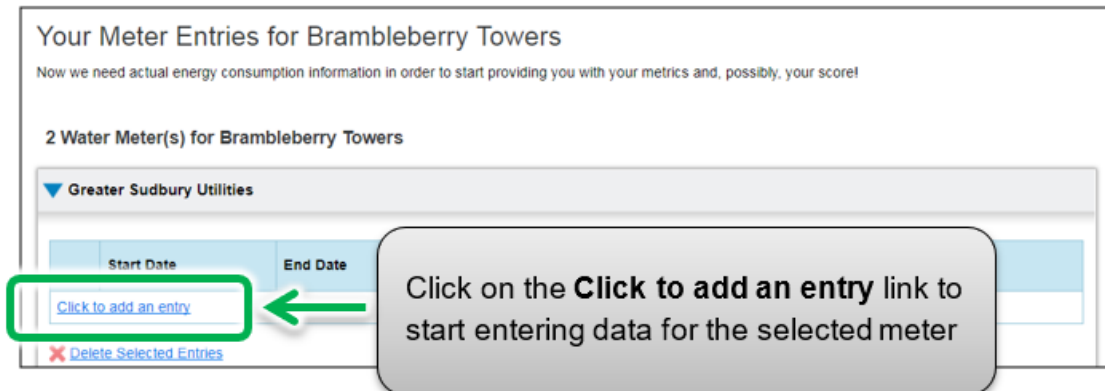
Meter Name	Type	Other Type	Units	Date Meter became Active	In Use?	Date Meter became Inactive
Greater Sudbury Utilities	Potable Indoor		Cubic meters	01/01/2017	<input checked="" type="checkbox"/>	
Fountain	Potable Outdoor		Cubic meters	01/01/2017	<input checked="" type="checkbox"/>	

Buttons: Add Another Entry, Create Meters

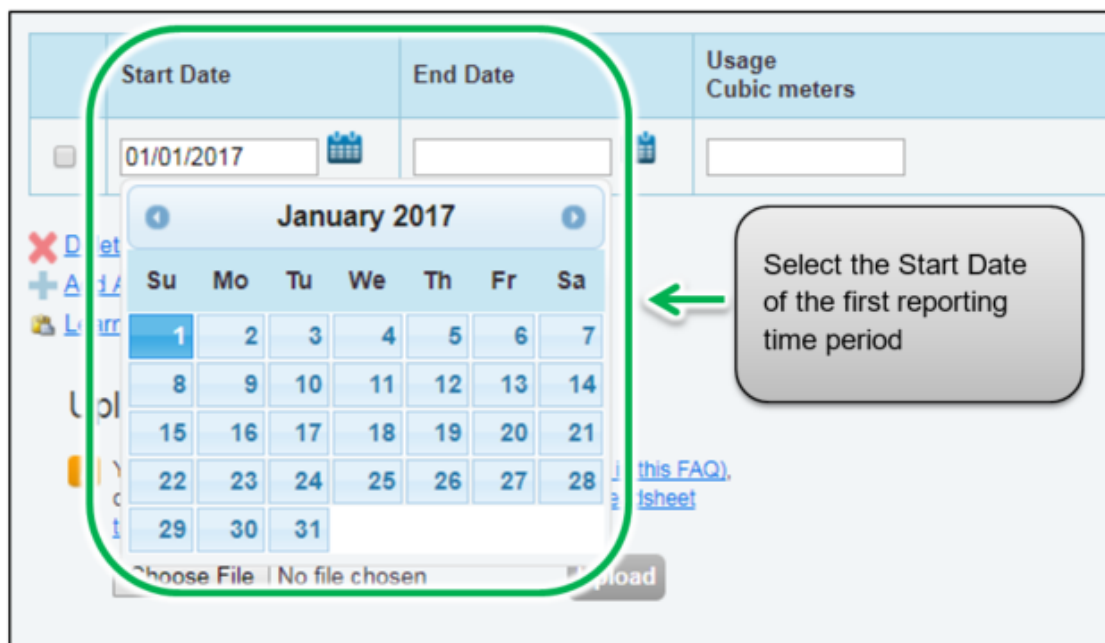
Callout: Enter the information for all meters

Callout: Click on the Create Meters button

10. The screen will reload to show the **Your Meter Entries** page. In the section for the first meter, click on the **Click to add an entry** link.



11. Under the **Start Date** column, click on the calendar icon to select the start date for the first reporting time period for the meter.



**Note:** If you are unable to obtain meter consumption data that begins on January 1 and ends on December 31, you can enter data that includes consumption outside of the reporting year. Portfolio Manager will then prorate the consumption data.

**Example:** You need to report your energy consumption from January 1, 2018 to December 31, 2018 and your billing cycle ends on the 20<sup>th</sup> of every month.

- The first reporting time period you enter will have a Start Date of December 21, 2017 and an End Date of January 20, 2018.
- The second reporting time period will have a Start Date of January 21, 2018 and an End Date of February 20, 2018.
- The final reporting time period will have a Start Date of December 21, 2018 and an End Date of January 20, 2019 (for a total of 13 monthly entries).

12. Under the **End Date** column, click on the calendar icon to select the end date of the first reporting time period for the meter. Whenever possible, report your usage using the smallest available time periods. Portfolio Manager cannot weather-normalize usage data reported in periods longer than 65 days and will not be able to calculate your building's energy use intensity.

Start Date	End Date	Usage Cubic meters
01/01/2017	01/31/2017	

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

Select the End Date of the first reporting time period

January 2017

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

13. Enter the consumption data for the selected reporting time period. If the building has not consumed water at this meter during the time period, enter '0'.

	Start Date	End Date	Usage Cubic meters	Total Cost (\$)
<input type="checkbox"/>	1/1/2017	1/31/2017	473	



Enter consumption data

**Note:** You can also enter your cost information in the **Total Cost** information field, but the EWRB regulation does not require it and it will not be shared with the Ministry of Energy, Northern Development and Mines.

14. Click on the **Add Another Entry** link and repeat steps 11 through 13 for each reporting time period until you have finished entering consumption data for the full year. Ensure that the **Start Date** of your new entry is the same day, or one day after, the **End Date** of your previous entry.

	Start Date	End Date	Usage Cubic meters
<input type="checkbox"/>	1/1/2017	1/31/2017	473
<input type="checkbox"/>	02/01/2017	02/28/2017	<input type="text"/>

[+ Add Another Entry](#)

Click on the **Add Another Entry** link to enter additional reporting time periods

15. When you have completed entering consumption data for the full year in the section for the first meter, scroll to the section for the next meter (if you have more than one) and repeat steps 10 through 14 for each meter that makes up the property's water use.

16. When you have entered all of the consumption data for all of the meters, click on the **Continue** button to proceed to the next step.
17. The page will reload to show the **Select Water Meters to Include in Metrics** page. Select all the meters that make up the property's water consumption and click on the **Apply Selections** button to complete the process and continue to the next section.

**Select Water Meters to Include in Metrics**

Tell us which meters to include when calculating the Water metrics for [Brambleberry Towers](#). Please select all meters that you want to include in the metrics calculation.

**Summary**

**2**

Please tell us what your meters represent.

**Water Meters**

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

<input type="checkbox"/>	Name Meter ID	Type
<input checked="" type="checkbox"/>	<a href="#">Greater Sudbury Utilities</a> 35880327	Potable Indoor
<input checked="" type="checkbox"/>	<a href="#">Fountain</a> 35880329	Potable Outdoor

**Total of 2 water meter(s).** Tell us what these meter(s) measure:

- ☒ These meter(s) account for the total water consumption for [Brambleberry Towers](#) (a single building).
- ☐ These meter(s) do not account for the total water consumption for [Brambleberry Towers](#) (a single building).

**About Sub-meters**

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

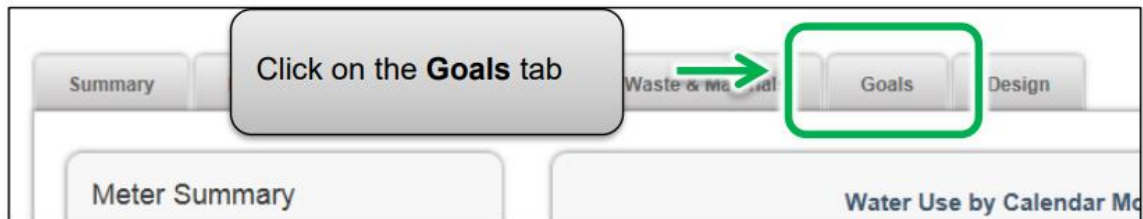
Select all the meters that make up the property's water consumption and click on the **Apply Selections** button

**Apply Selections**

## 2.6 – Third-Party Certifications

The following are the steps to add a third-party certification (if the building has one) to the property profile.

1. Continuing from the previous section, scroll to the top of the page and click on the **Goals** tab.



2. The screen will reload to show the **Goals** tab page. Scroll to the bottom of the page and click on the **Start the Checklist** button.



3. The screen will reload to show the **Sustainable Buildings Checklist** page. In the **About this Checklist** section of the page, click on the **Select a Third Party** link.

**Sustainable Buildings Checklist: Brambleberry Towers**

The Sustainable Buildings Checklist evaluates sustainability in existing buildings. It was first developed by the U.S. Green Building Council (USGBC) and the U.S. Environmental Protection Agency (EPA). It can also be used to evaluate buildings that are not yet built. The [2016 Guiding Principles](#) are on hold. In the meantime, the 2016 Guiding Principles can be used.

**About this Property**

Property Name: [Brambleberry Towers](#) [View Details & IDs](#)

**About this Checklist (Last Updated: 08/30/2017)**

Estimated Date of *Sustainable Buildings Checklist* Compliance:

Actual Date of *Sustainable Buildings Checklist* Compliance:

Third Party Certification: None [Select a Third Party](#)

Checklist Manager:  [Add Contact](#)


4. The screen will reload to show the **Add/Edit Third Party Certifications** page. If your property has any third-party certifications, please report them in this section. Two common certifications, LEED and Green Globes, are listed. If your building has another certification, add it in the **Other** section. Enter the required dates, then click on the **Save Certifications** button to confirm your changes and proceed to the next step.




**Add/Edit Third Party Certifications: [Brambleberry Towers](#)**

Enter your third party certification:


Third-party Certification? ☒ LEED Certification


Target Date of Certification:  

Actual Date of Certification:  

☐ Green Globes

☒ Other

Target Date of Certification:  

Actual Date of Certification:  

Select the applicable certifications, enter the required dates, and click on the **Save Certifications** button

**Save Certifications**

- You will be returned to the **Sustainable Buildings Checklist** page. Scroll to the bottom of the page and click on the **Save & Close** button to confirm your changes and proceed to the next step.


**Notes/Comments:**

Click on the **Save & Close** button to confirm your changes

**<< Back** **Save & Close** **Save & Continue >>** [Cancel](#)

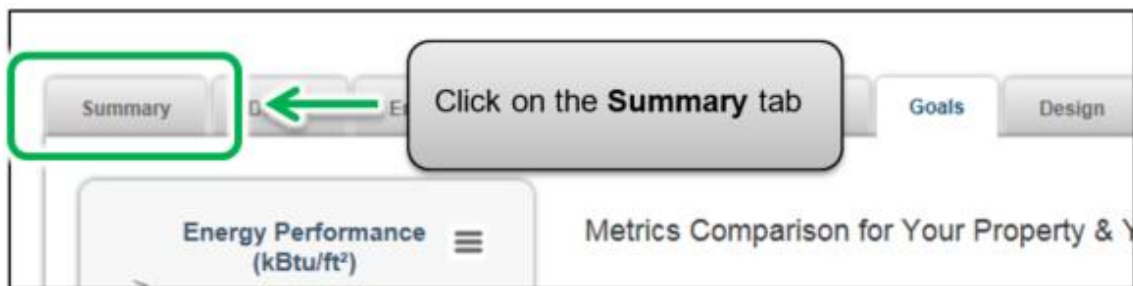


## 2.7 – Checking for Possible Errors

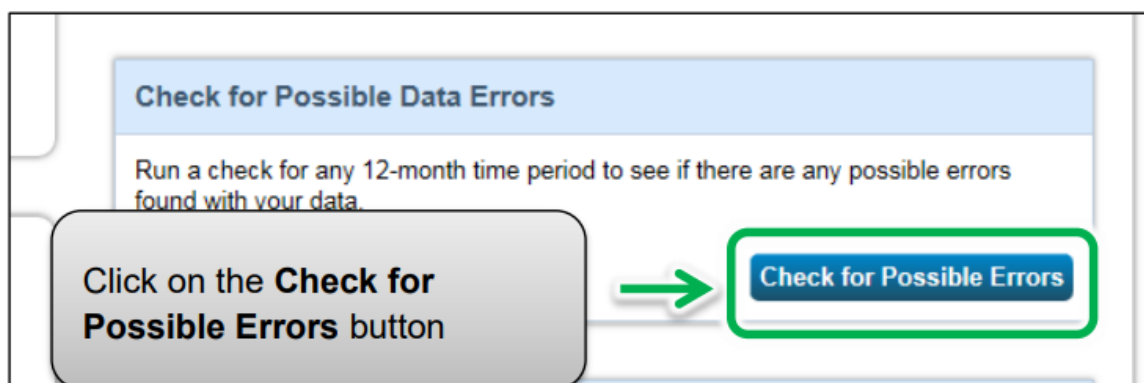
 **Important:** The Data Quality Checker is **NOT** a substitute for data verification because it does not identify all issues. A third-party data verifier is still necessary for properties with a gross floor area of 100,000 square feet or more – see the next section for more details on data verification.

The following are the steps to check for possible errors in your property's profile.

1. Continuing from the previous section, scroll to the top of the page and click on the **Summary** tab.



2. The screen will reload to show the **Summary** tab page. Scroll down the page and locate the **Check for Possible Data Errors** section. Click on the **Check for Possible Errors** button.



3. The screen will reload to show the **Data Quality Checker** page. Select the **Year Ending** date for the error check – it will be December 31 of the year for which you are reporting data.

**Data Quality Checker for [Brambleberry Towers](#)**

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your 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**) to see possible data issues.

Year Ending:   [Run Checker](#)

Select the **Year Ending** date for the error check

4. Click on the **Run Checker** button to initiate the property profile check.

**Data Quality Checker for [Brambleberry Towers](#)**

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your 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:   [Run Checker](#)

Click on the **Run Checker** button

5. The **Data Quality Checker** will notify you immediately if there are any issues with your data. Please attempt to fix all issues, particularly those marked with a red alert icon. You can follow the links in the alerts to view and correct your data as needed.

**Data Quality Checker for [Brambleberry Towers](#)**

The Data Quality Checker will help you find potential errors and unusual data within a given year. Select your year and click 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 (Metric Year). Select a [Year Ending Date](#) and click "run checker".

Year Ending:   [Re-Run Checker](#)

**Example of an alert. This one is for incomplete data**

**There is not 12 full months of meter data.**

**Problem:** The following meters do not have 12 full calendar months of meter entries for the year selected (01/01/2016 - 12/31/2016).

- [Union Gas](#) (missing bills for 12/02)

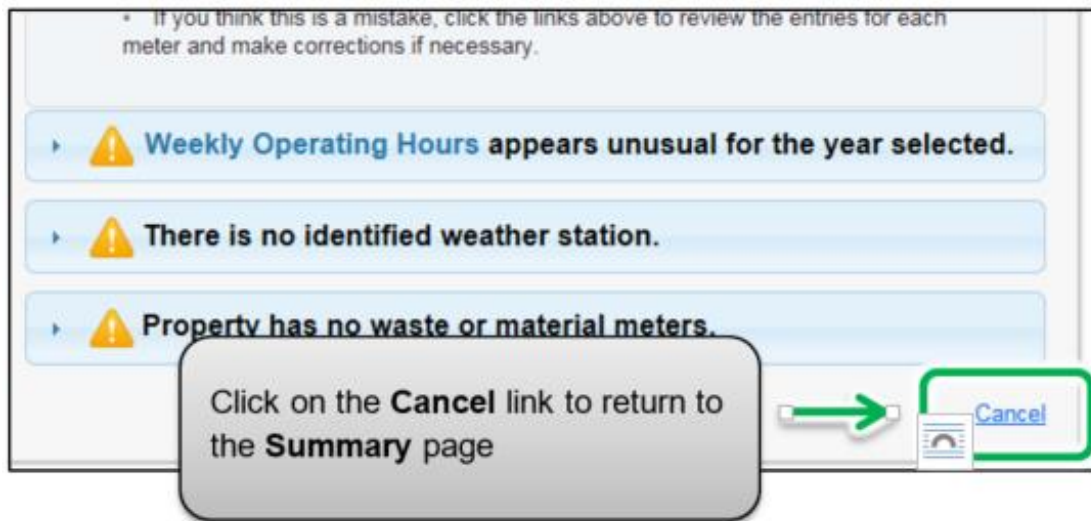
**What to do:**

- If you think this is a mistake, click the links above to review the entries for each meter and make corrections if necessary.

**Follow the links in the alerts to view and correct your data as needed**

[Help](#) **Weekly Operating Hours** appears unusual for the year selected.

6. After you have addressed each of the alerts in the Data Quality Checker, click on the **Cancel** link at the bottom of the page to return to the **Summary** page.



## 2.8 – Data Verification



**Important:** Properties with a gross floor area of 100,000 square feet or more are required to have their data verified by an accredited or certified professional. To view data verification requirements and examples of acceptable accreditations and certifications, go to [Data Verification Requirements](#).

The accredited or certified professional will conduct a review of your data to ensure there are no errors.

The following are the steps to enter data verification information in your property's profile after your data has been verified.

1. Continuing from the previous section, scroll to the top of the property profile page and click on the **Details** tab.



2. The screen will reload to show the **Details** tab page. Scroll down the page and locate the **Unique Identifiers (ID)** section. Click on the **Edit** button found in the section.



3. The screen will reload to show the **Property Identifiers (IDs)** page. In the **Custom IDs** section, under **Custom ID 3**, enter "Data Verification" in the **Name** field.

The screenshot shows a form titled "Custom IDs". It includes a sub-header "You can add up to three" and a note "Only people who have access to this property". The form has three sections for "Custom ID 1:", "Custom ID 2:", and "Custom ID 3:". Each section has a "Name:" field and an "ID:" field. The "Custom ID 3" section is highlighted with a green rectangular box. The "Name:" field for "Custom ID 3" contains the text "Data Verification". A grey callout box with the text "Enter the name for **Custom ID 3** exactly as shown here" has a green arrow pointing down to the "Name:" field of "Custom ID 3".

- Properties with a gross floor area of 100,000 square feet or more are required to have their data verified. If the data has been verified, enter “**Yes**” in the **ID** field. If your property is not required to have its data verified and it has not been verified, enter “**No**” in the ID field.

Custom ID 3:

Name:

ID:

If required, enter “**Yes**” in the **ID** field after your data has been verified; otherwise enter “**No**”.

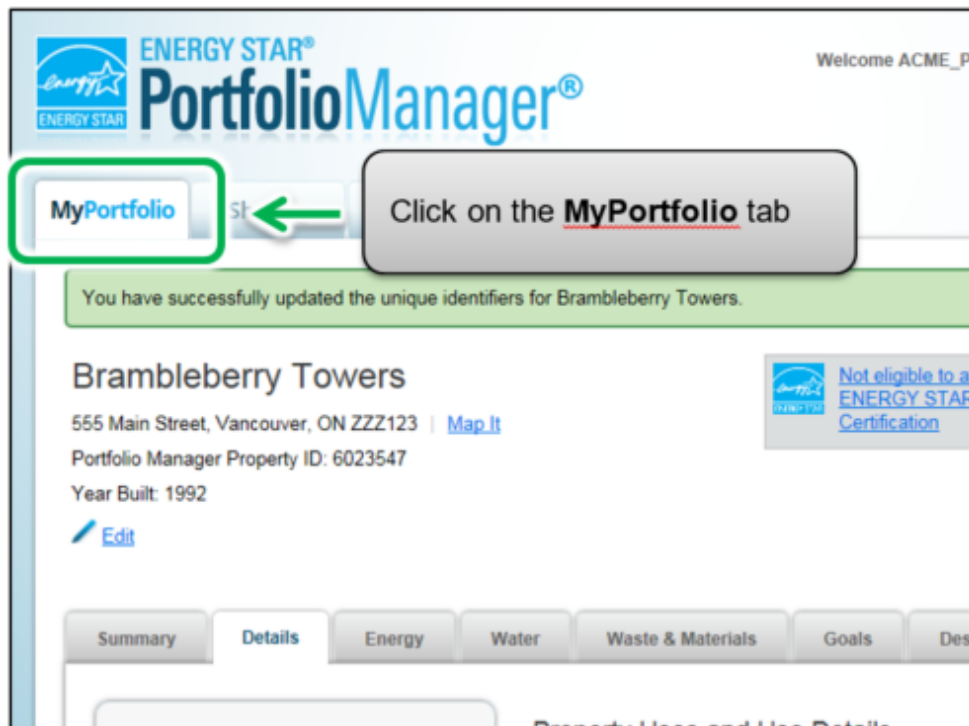
- Click on the **Save** button at the bottom of the page to confirm your changes and proceed to the next section.

## 2.9 – Adding Another Property

You have now completed the process for adding a single property to Portfolio Manager.

**The following are the steps to add another property.**

1. At the top of the page, click on the **MyPortfolio** tab to view all of your properties.



2. The screen will reload to show the **Portfolio Views** page. Here you can view all your properties and some summary metrics. If you have more properties to report, click on the **Add a Property** button and repeat the steps from the previous sections starting from section **2.1.1 Adding and Setting Up a Property**.





### 3 – Submitting Your Report

During the submission process, you will complete the submission for your portfolio of buildings that are required to report under the EWRB initiative. Once you have added all of your properties to Portfolio Manager, you can submit your report.

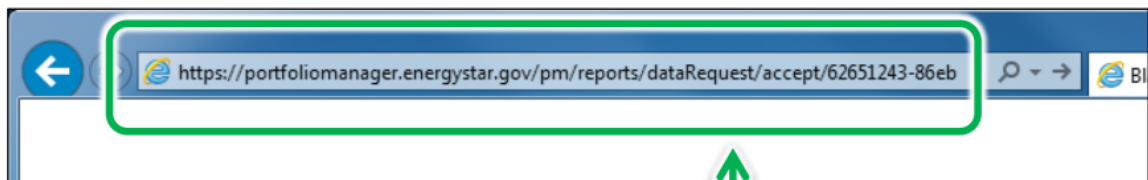
**The following are the steps to complete the submission process for your portfolio.**

1. Click on the Portfolio Manager EWRB 2020 submission link provided here:

<https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/07b7b9d6-b7a8-4898-9de8-4e71b99b7b3e>.

Or, you can copy the link above and paste it into the address bar of your web browser.

The link in the box below is illustrative. When reporting, please copy and paste the correct link in the text, above.



Copy and Paste the link into your web browser's address bar

2. The link will open a **Data Request** page. In the **About Your Response** section, select who the data is being submitted on behalf of. Select “myself” unless you are submitting data on behalf of a client.

**Respond to Data Request: EWRB Energy and Water Usage Data Request for 2016**  
from Ontario Ministry of Energy (Ontario Ministry of Energy)

**About this Data Request**

**Data Requested By:** Ontario Ministry of Energy

**For help, contact:** Ontario Ministry of Energy at [ewrb-support@ontario.ca](mailto:ewrb-support@ontario.ca) or 1-844-274-0689

**About Your Response**

**Who is this data being submitted on behalf of?**

☒ myself

☐ someone else

**Select who the data is being submitted for**

**Responding to Data Requests**

You are viewing this screen because someone has asked you to provide them in the form of a data request. To respond, simply fill out the information on this screen and select what properties you wish to include (some decisions have been made by the data request).

Also see the [How to Respond to Requests](#) guide.

**Submitting Data for Someone Else**

Some people delegate their responsibilities for responding to data requests to other people. If you are submitting data on behalf of someone else, you must provide their name from your account so that they will be able to review the response.

**Previewing Reports**

3. In the bottom part of the page, the **Your Response** section shows the timeframe of the request (this is specified by the Ministry of Energy, Northern Development and Mines and cannot be changed). From the **Properties** drop-down list, select one of the following options:
  - a. **One Property** – You will be prompted to select a single property from your portfolio for the submission.
  - b. **Multiple Properties** – You will be prompted to select a group of properties from your portfolio for the submission.

- c. **All Properties** – This option will include all properties from your portfolio for the submission.

The screenshot shows a web form titled "Your Response" with the heading "Select Information to Include:". It contains two dropdown menus: "Timeframe:" set to "Single Year" and "Properties:" set to "All Properties". The "Properties:" dropdown is highlighted with a green rectangle. Below it, a green arrow points to a grey callout box that says "Select the desired option". To the right of the "Properties:" dropdown, there is a blue button labeled "Generate Response Preview" and a blue link labeled "Cancel".

4. Click **Generate Response Preview**.

This screenshot is similar to the previous one but with different annotations. A grey callout box with the text "Click on the **Generate Response Preview** button" has a green arrow pointing down to the "Generate Response Preview" button, which is now highlighted with a green rectangle. The "Properties:" dropdown remains set to "All Properties".

The Reporting tab will open with a status box explaining that your report is being generated.

A preview for your response to the data request "Data Request: EWRB 2016" on behalf of Ratheyar Aravind (TEST3) is being generated.

You may view your response preview by selecting "Preview Response" or "Download Preview in Excel" from the action menu below. Large responses may take a long time to prepare. After you have viewed your response, you must select "Send Response" in order for your data to be released.

Please note that each property you included should have a full 12 months of information for each timeframe. Otherwise, the metrics may not be able to be calculated. When this happens, "N/A" will be displayed in your response.

5. Scroll down the page and locate the **Templates & Reports** section. The **Status** field will indicate the "**Generating Response Preview**" message while processing. It may take several minutes for the preview to be generated.

Templates & Reports (51) Create a New Template

Name	Status	Action
Nov 1 - EWRB Pilot Energy and Water Reporting and Benchmarking Request for 2016 (Request from Ontario Ministry of Energy)	Generating Response Preview	I want to...
Data Request: EWRB Energy and Water Data Request for 2016 -	Generating Response Preview	I want to...

The **Status** field will indicate **Generating Response Preview**

6. Once the process has completed, the **Status** field will indicate "**Response Preview Generated**". From the **Actions** drop-down list, select the **Preview Response** option to preview your submission if you want to preview your response. Otherwise, go to step 9.

Your new response preview(s) has been generated.

Name	Status	Action
Data Request: EWRB 2016 (Request from Ontario Ministry of Energy)	Response Preview Generated: 2/13/2017 11:36 AM	I want to... Preview Response Generate an Updated Response Send Response Delete Response

Select the **Preview Response** option to preview your submission

7. The **Reporting** tab will reload to show the **View Report** page. The page will include the **Information and Metrics** table displaying the property data that will be included in your submission. Use the page scroll bars to view the full details of the property data that will be submitted to the Ministry of Energy, Northern Development and Mines.

Information and Metrics 1 records

Property Id	Property Name	Year Ending	Address 1	Address 2	City	State/Province	Postal Code
5993114	Campbellton Community Upload	12/31/2016	123 Jasper Ave	Not Available	Toronto	Ontario	M4V1Q1

Use the scroll bars to view the full details of the submission



8. At the bottom of the page, click on the **Close** link to proceed.



9. You will be returned to the Reporting tab. Scroll down to the **Templates & Reports** table and locate the generated data request. Select the **Send Response** option from the **Action** drop-down list to proceed to the next step.



**Important:** In some cases, you may want to add or update information after you have already sent your submission to the Ministry of Energy, Northern Development and Mines (for example, if you realize that your information is incomplete, or something has changed since you submitted your information). To do this, first update only the property information you want to change. Then from the Reporting tab scroll down and locate the data request response you want to update. Select **Generate an Updated Response** from the Action drop-down list and proceed to the next step.

Name	Status	Action
EWRB Energy and Water Usage Data Request for 2016 (Request from Ontario Ministry of Energy)	Response Preview Generated: 11/21/2017 4:18 PM	<div>I want to... Edit Properties and Timeframe Preview Response Generate an Updated Response Send Response Delete response</div>
Performance Highlights	No Report Generated	
Energy Performance	No Report Generated	

10. Once you have selected the **Send Response** option, you will be brought to a response confirmation page. Under section “1”, from the **Select contacts** list box, select the people from your contact book you wish to send a confirmation email to. In the **Additional Email Addresses** box, enter the email addresses of the people you wish to send a confirmation email to who are not listed in your contact book.

**Confirm Response to Data Request from Ontario Ministry of Energy)**

By clicking Send Data, you will release data to Ontario Ministry of Energy (Ontario Ministry of Energy). You will receive a copy of the data attached.

**1 Who (besides you) should we send a confirmation email to?**

Select contacts from your contacts book:

Luc Besner (RRE\_Admin)

To select multiple contacts, hold down your Control (CTRL) key and click on each selection.

Optional- Additional Email Addresses:

joe@gmail.com

Select the individuals from your contact book who you wish to send a confirmation email to

Enter the email addresses of the individuals who are not in your Portfolio Manager contact book

11. Under the “2” section, select the **Excel** option as the email attachment format.

**2 What format would you like your data in for the email attachment?**

☒ Excel

☐ XML

Select the **Excel** option

12. In section “3”, select the checkbox to confirm the release of your data to the Ministry of Energy, Northern Development and Mines. Enter your **Username** and **Password** and then click on the **E-Sign Response** button to give your consent.

The screenshot shows a web form titled "3 E-Sign your Data Response". A grey callout box at the top right says "Select the checkbox to confirm the release of your data to the Ministry of Energy". A green arrow points down from this box to a checkbox. The checkbox is located inside a green-bordered box and contains the text: "I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Ontario Ministry of Energy with Ontario Ministry of Energy." Below this, there are two input fields: "Your username:" and "Your password:". A green arrow points up from a grey callout box at the bottom to the "E-Sign Response" button. The "E-Sign Response" button is a blue button located to the right of the password field. At the bottom right of the form, there are two more buttons: "Send Data" (blue) and "Cancel" (blue text link).

Select the checkbox to confirm the release of your data to the Ministry of Energy

3 E-Sign your Data Response

☐ I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Ontario Ministry of Energy with Ontario Ministry of Energy.

Your username:

Your password:

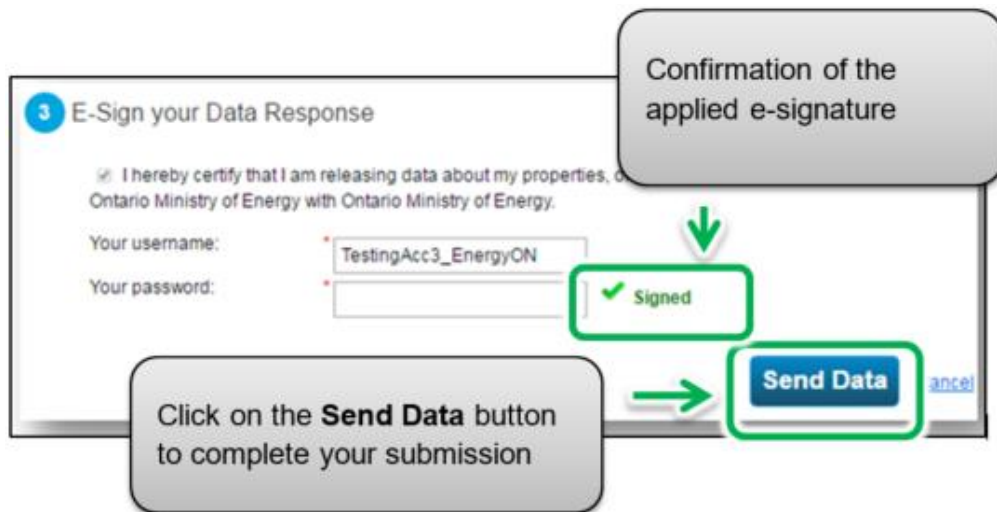
E-Sign Response

Send Data [Cancel](#)

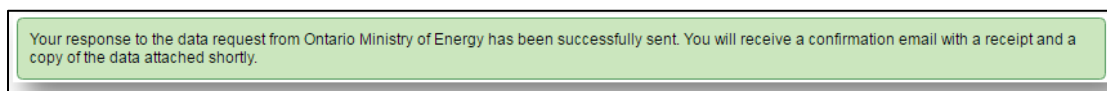
Enter your **Username** and **Password** and then click on the **E-Sign Response** button to give your consent



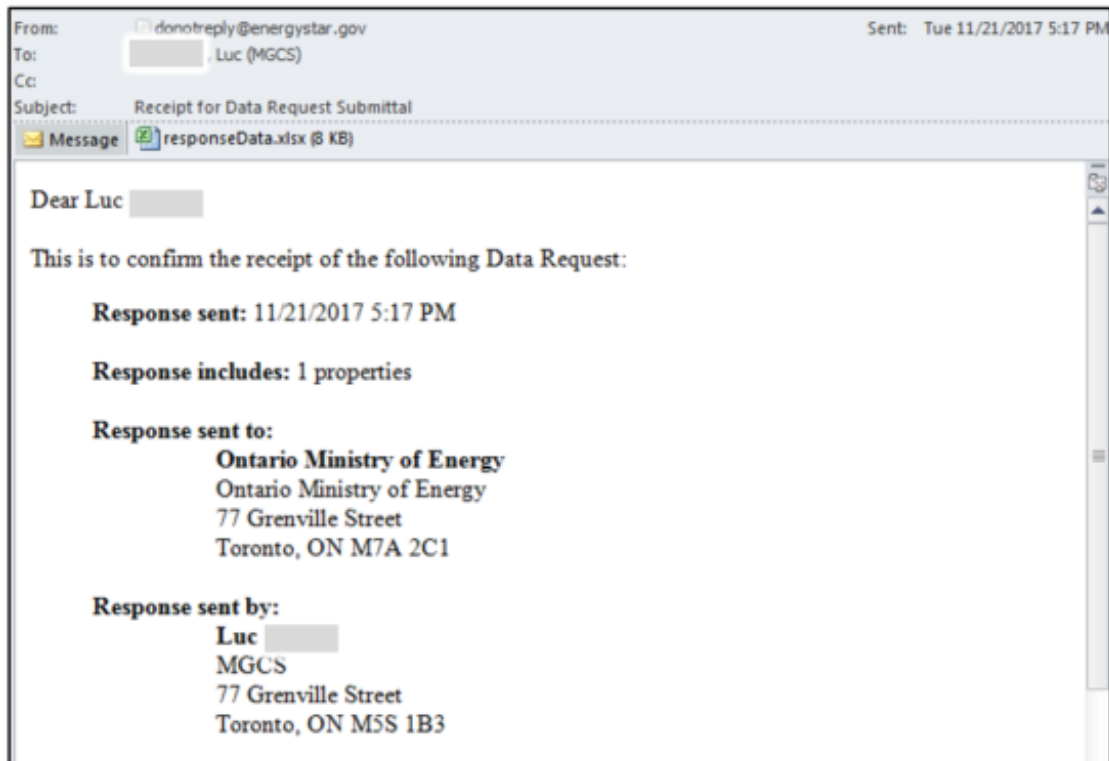
13. If your entry is successful, the page will reload to show a green checkmark as a confirmation of your e-signature. Click on the **Send Data** button. When prompted to confirm, click on the **Continue** button.



The page will reload to show the following message confirming that your submission was completed successfully.



You should also receive an email confirmation shortly afterwards.



Congratulations, you have completed your requirement to report for the year.