Guide to Submitting Data through Portfolio Manager for Ontario's Broader Public Sector

March 2023

Ministry of
Energy Version
1.0

Ontario

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

Contents

About Ontario's Broader Public Sector Energy Reporting Initiative

Energy usage can represent one of the largest operating costs for public agencies. Energy reporting and conservation planning helps public agencies:

- better manage their energy use and costs
- identify best practices and energy-saving opportunities
- find ways to reduce greenhouse gas emissions
- evaluate results by comparing similar facilities across the province
- provide a benchmark to set goals
- measure improvement over time

Under the energy reporting regulation for broader public sector (BPS) organizations, Ontario public agencies must report their annual energy use each year to the Ministry of Energy by July 1.

More than 700 agencies are required to submit a report, including:

- municipalities and municipal service boards
- universities and colleges
- school boards
- hospitals

The Portfolio Manager Guide and Other Resources

This document will guide you through the process of entering your energy consumption data into Portfolio Manager specifically for BPS organizations.

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

- The BPS homepage provides an overview of the initiative, reporting requirements and benefits of reporting
- The Guide to BPS Energy Reporting provides detail on the reporting steps and requirements, including property types and collecting usage data
- 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 is to update your organization's Reporting Lead contact information. The reporting lead is the person who will receive energy reporting related emails for your organization. You can update the information any time.

To update your Reporting Lead contact information, please contact us at the phone number or email address provided below.

Contact us

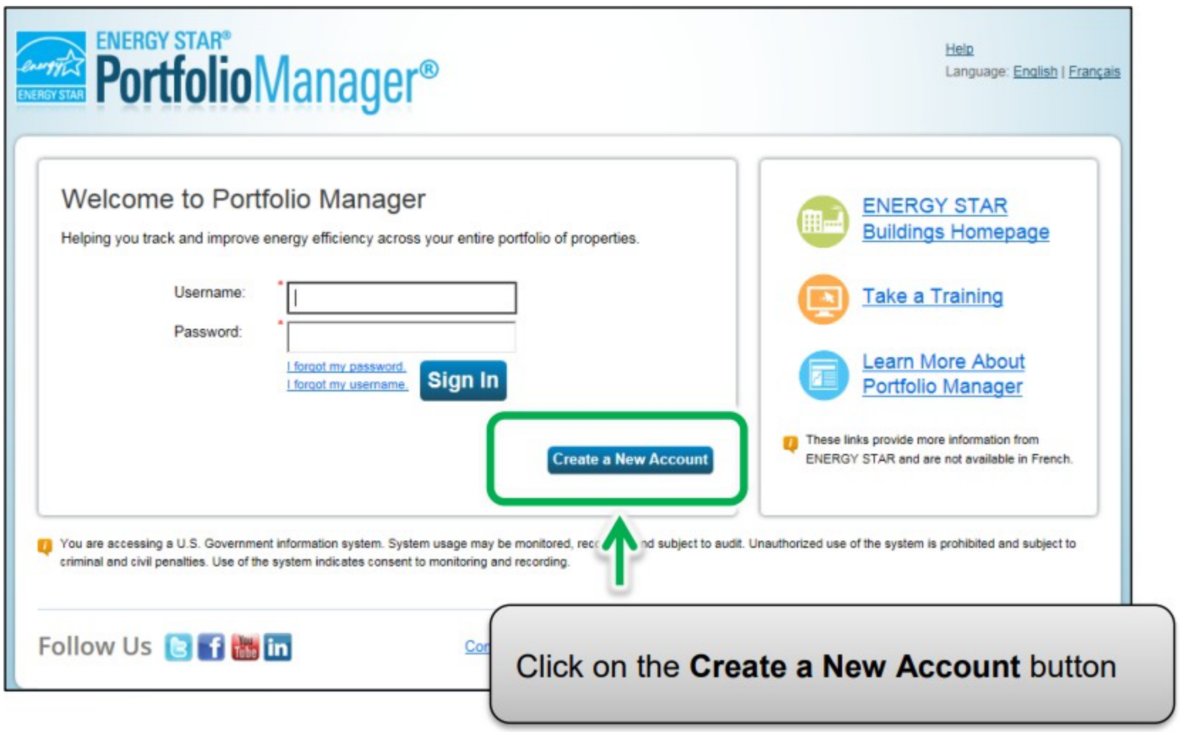
If you have a question, please contact **BPS Support** at bpssupport@ontario.ca.

1 – Creating a Portfolio Manager Account

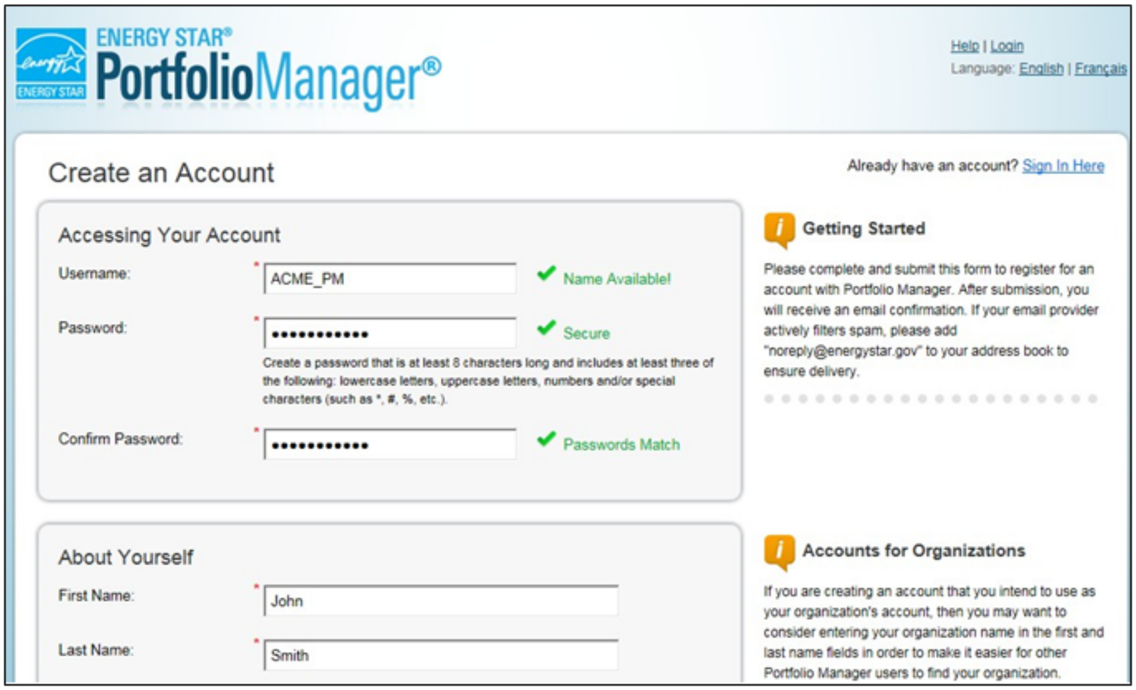
The following are the steps to create a Portfolio Manager account.

1. Open your web browser and go to the Portfolio Manager log-in page at https://portfoliomanager.energystar.gov/pm/login.html.

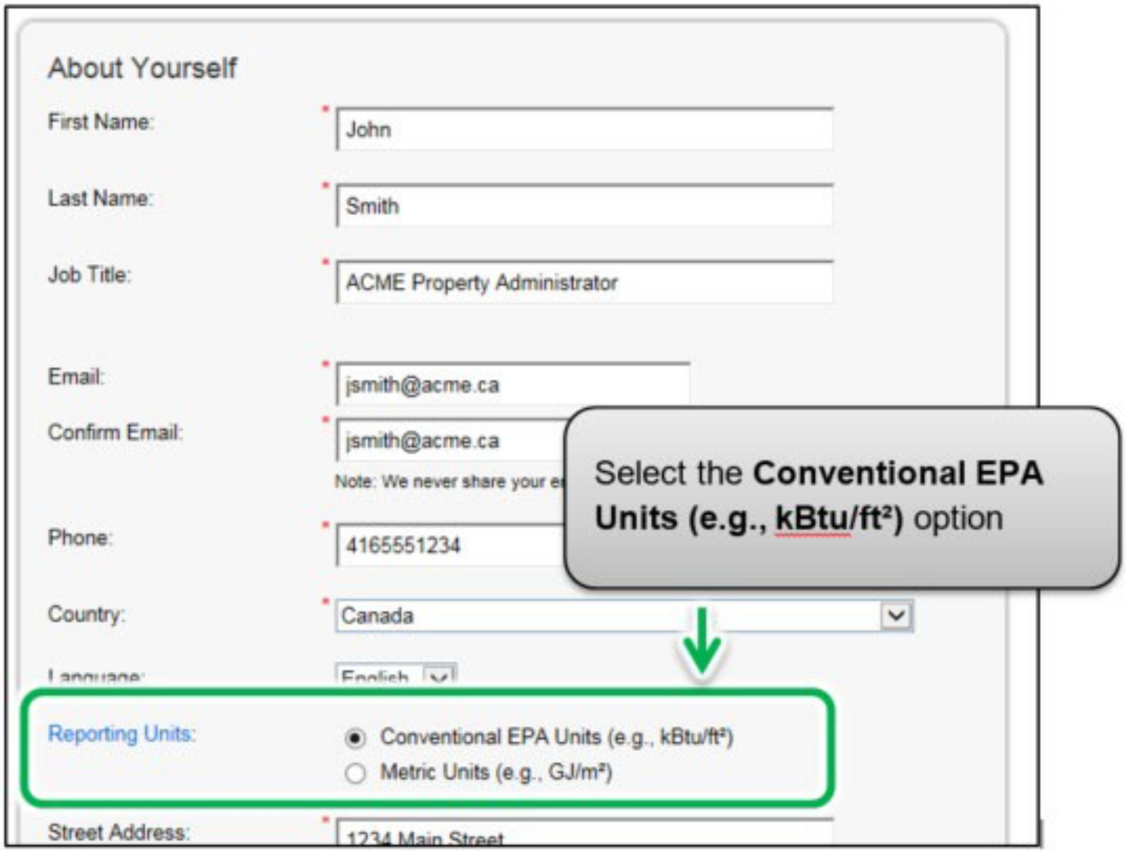
2. Click on the **Create a New Account** button.



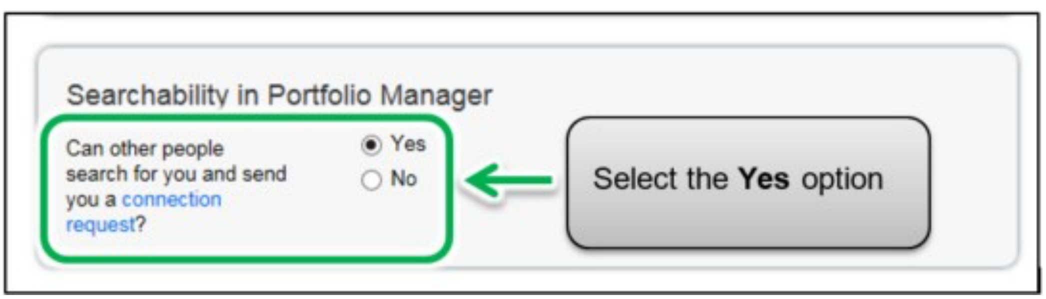
3. The screen will reload to show the **Create an Account** page. Enter the required information. Fields marked with a red asterisk are mandatory.



4. Under the **About Yourself** section, for the **Reporting Units** field, select the **Conventional EPA Units (e.g., kBtu/ft²)** option.



5. For the **Searchability in Portfolio Manager** section of the form, 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. You can refer to the Portfolio Manager website for additional instructions on entering data using Microsoft Excel and via Web Services.

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.

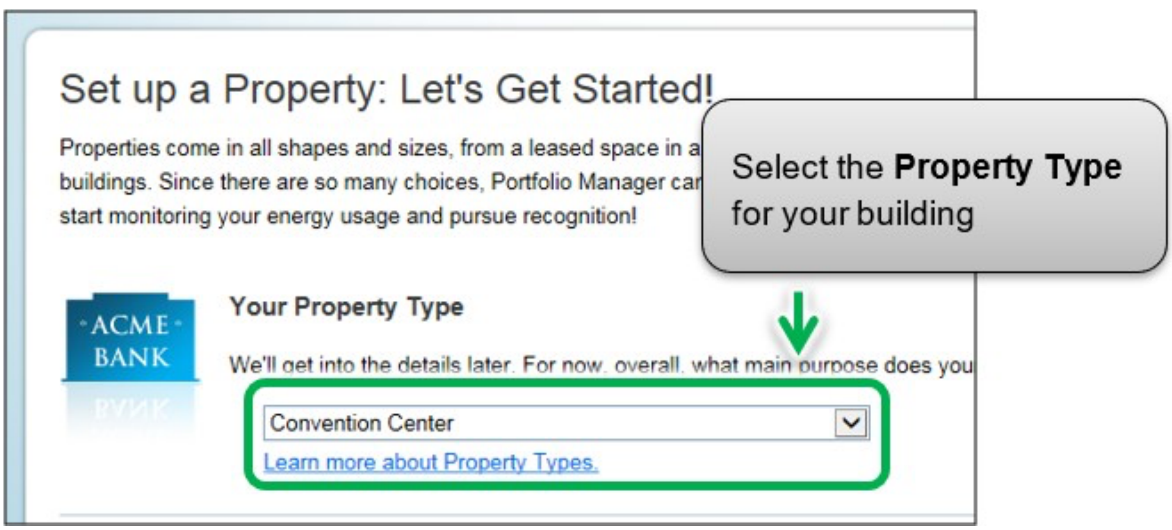
3. **Web Services** - Many leading energy services companies exchange data directly with Portfolio Manager. These companies can upload your energy and water data for you. If you decide to use web services provided by a third party, you are responsible for ensuring the quality and accuracy of the data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

2.1 – Adding and Setting Up a Property

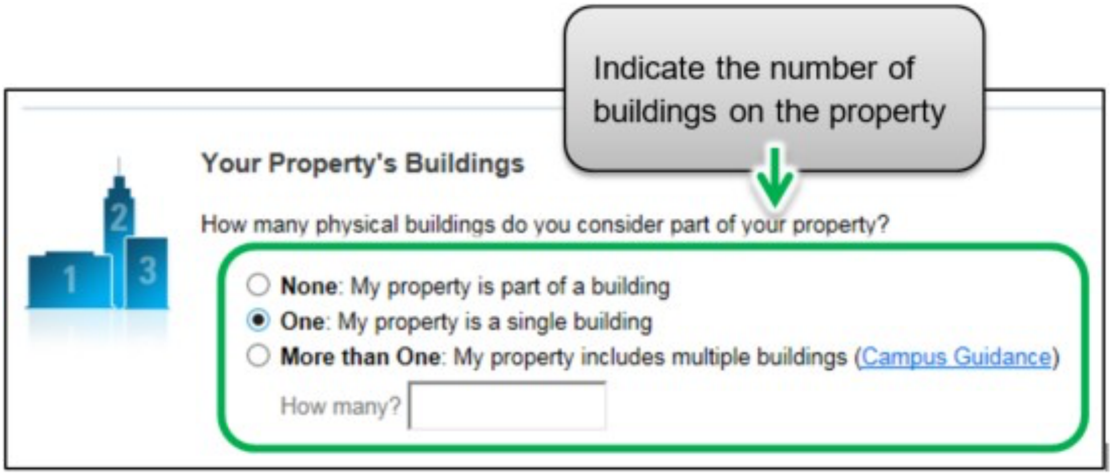
The following are the steps to add and set up a property.

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

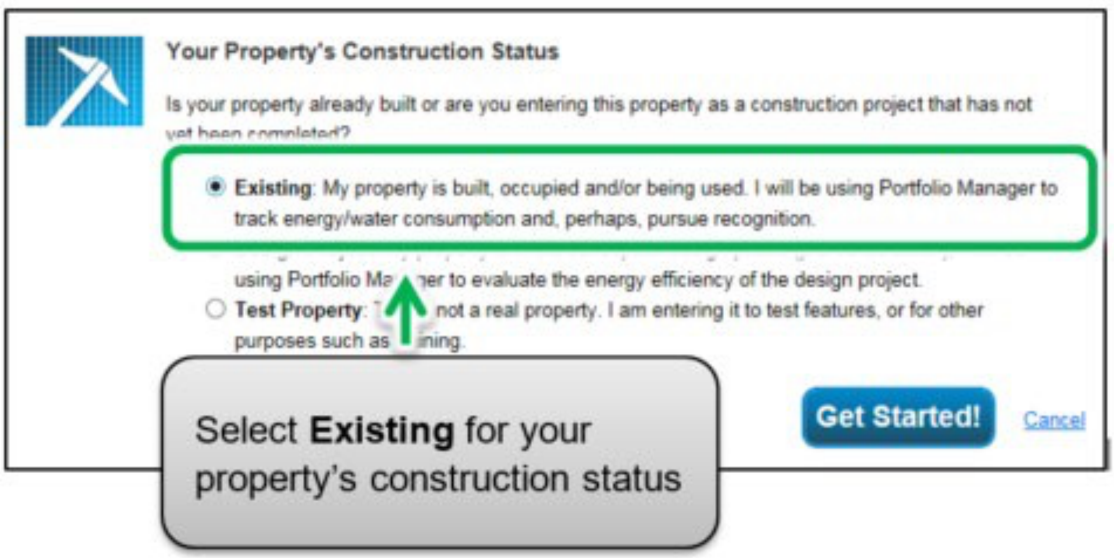
2. The screen will reload to show the **Set up a Property** page. Select the property's primary function from the **Your Property Type** drop-down list.



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



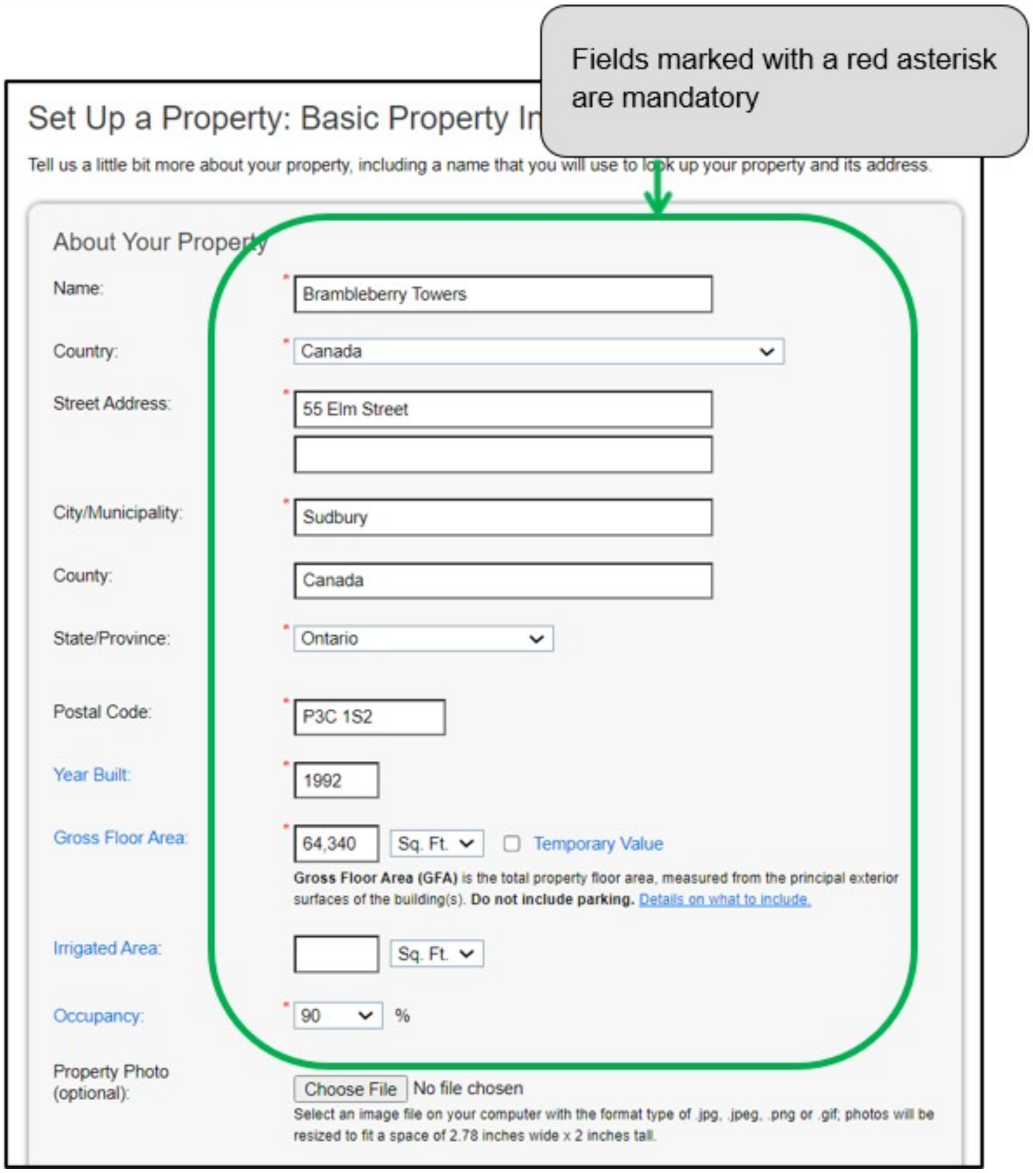
4. In the **Your Property’s Construction Status** section, select **Existing**.



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

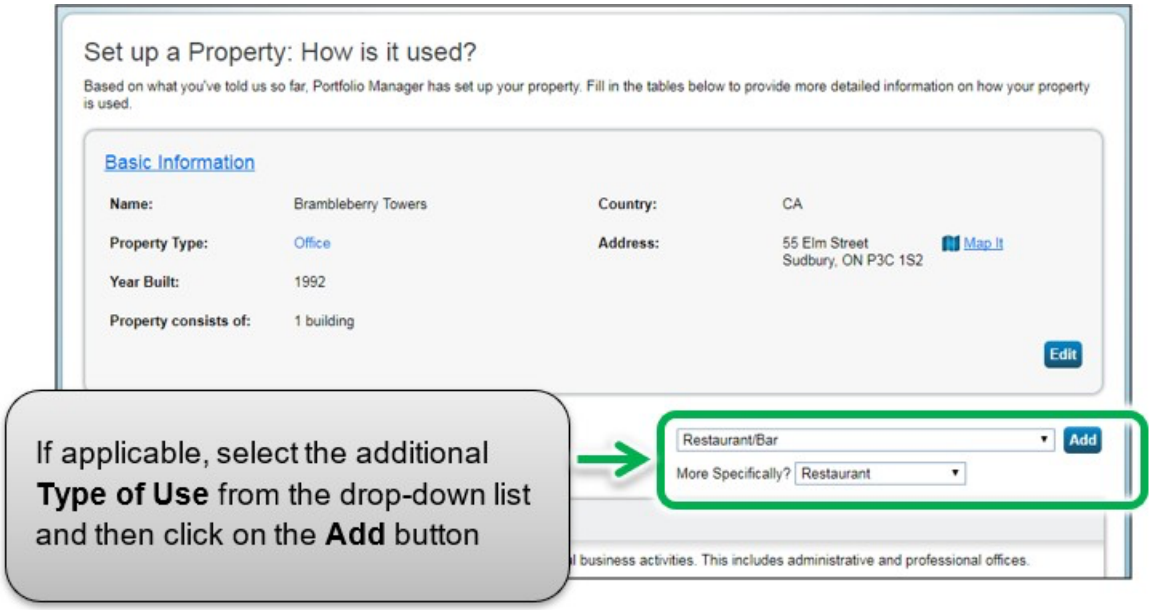
6. The screen will reload to show the **Basic Property Information** page. Enter the required information. Fields marked with a red asterisk are mandatory. Use numeric values only with no commas when entering Gross Floor Area data.

   Note: Occupancy is the percentage of your property's Gross Floor Area that is occupied and operational. See more on calculating Occupancy on Energy Star's Website. Although this field is mandatory for Energy Star, it is not one required by the ministry and is not utilized in the calculation of GHG emissions.



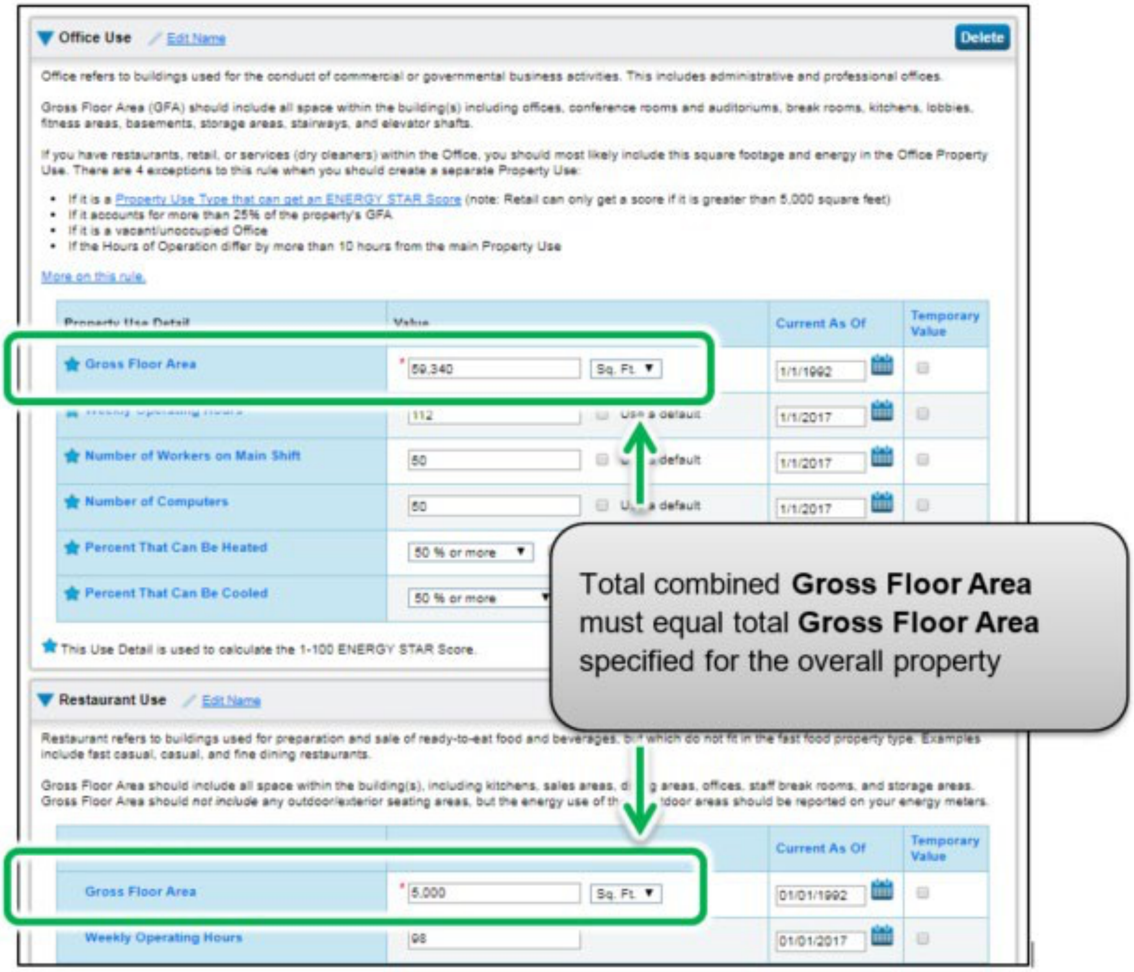
7. Once you have entered all the necessary information, click on the **Continue** button to proceed to the next page.

8. 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.



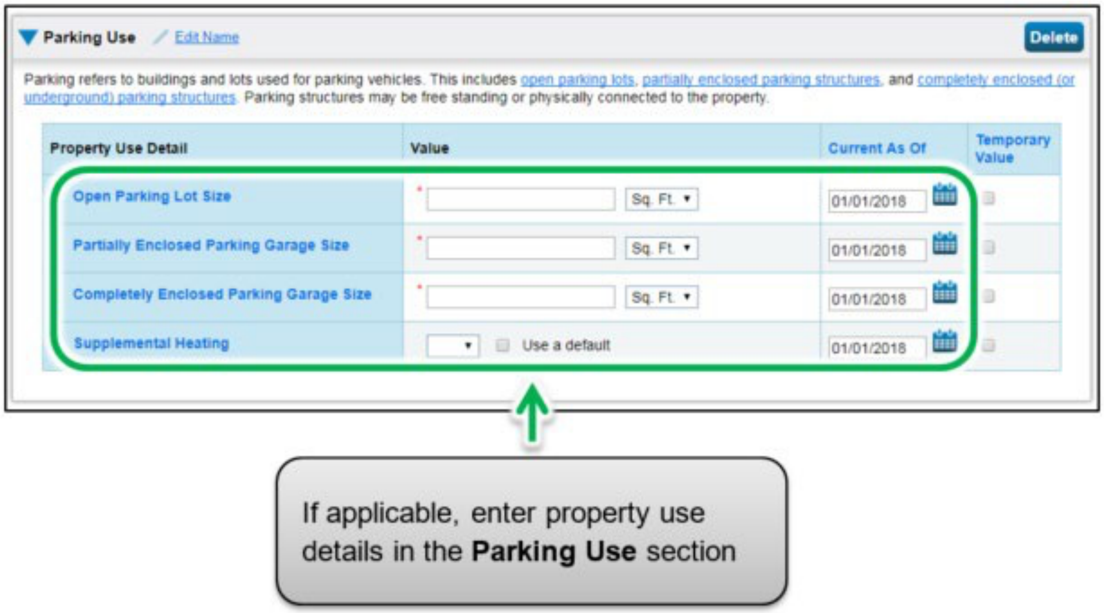
9. Scroll to the next section of the page and enter all of the **Property Use Details** for each type of use:

   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.



a. A building may include more than one property use type (e.g., classroom / laboratory) 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.
b. **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 BPS 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.



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.

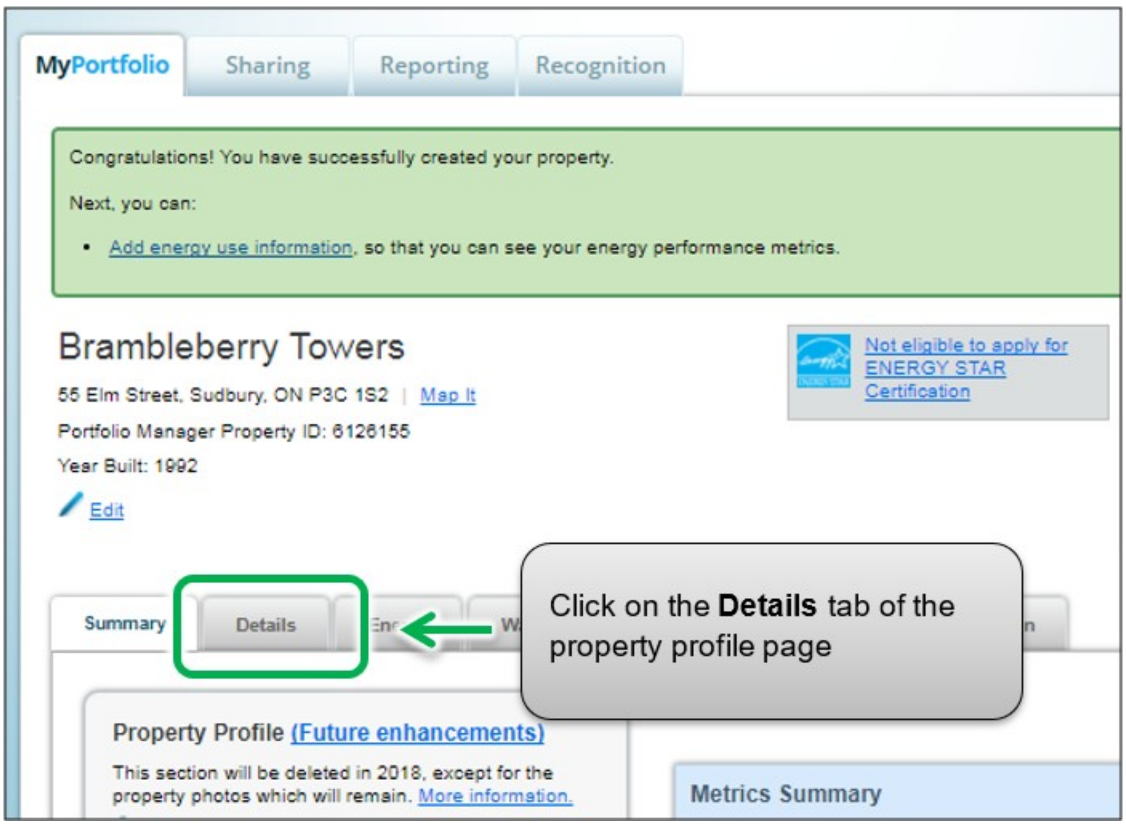
2.2 – Adding Your Building's Custom IDs

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 usage, and more.

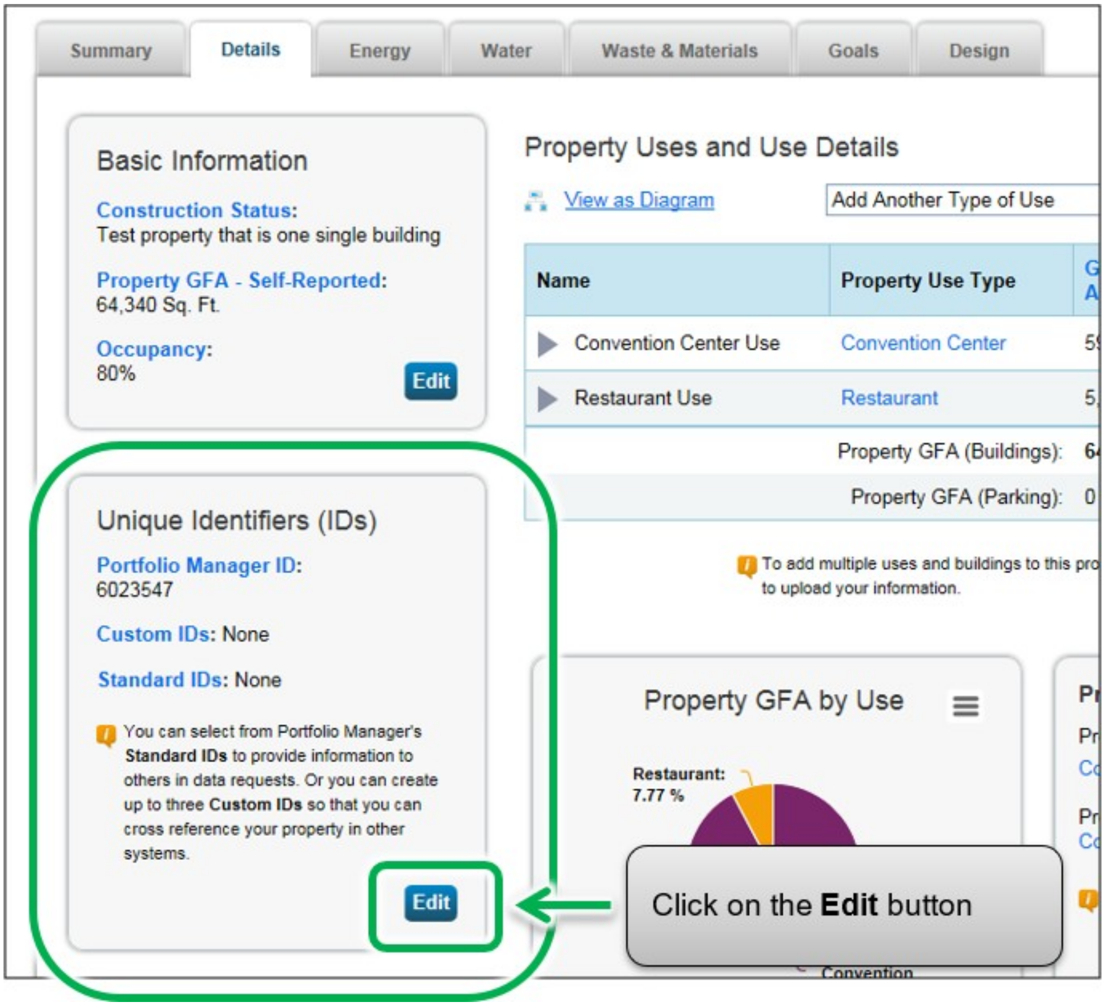
To successfully submit your report, **it is essential that you enter your building's custom ID information in the Details tab of the property's profile page.**

The following are the steps to add your building's custom IDs 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.

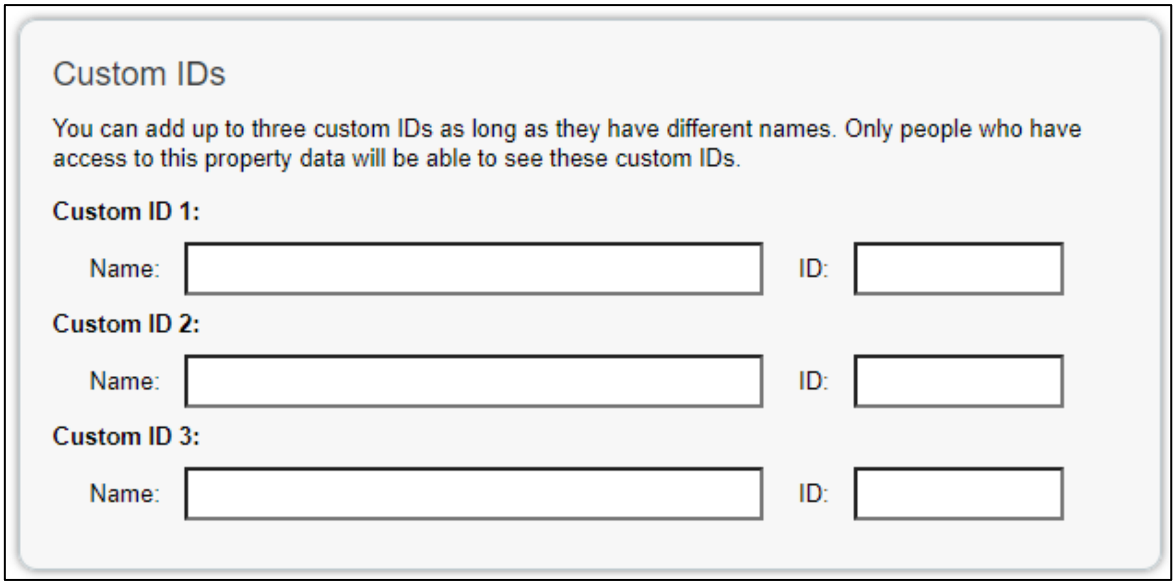


2. The page will refresh to show the **Details** section. Scroll down the page to view the **Unique Identifiers (IDs)** section and click on the **Edit** button found in the section.



3. The screen will reload to show the **Edit Property Identifiers (IDs)** page. Scroll to the **Custom IDs** box. Enter Custom ID names and ID values based on the sector your organization belongs to from the information in below.
    a. Custom ID 1 Name – Enter the term "Organization Name" in the space for this field
    b. Custom ID 1 Value – Enter the name of the BPS organization for which you are entering data (Example, City of Toronto, Algonquin College etc.)
    c. Custom ID 2 Name –
        - Enter the term "Sub-sector" in the space for this field if you are reporting on behalf of municipalities, municipal service boards, post-secondary institutions or hospitals.
        - Enter the term "Weekly Average Hours" in the space for this field if you are reporting on behalf of school boards.
    d. Custom ID 2 Value –
        - For municipalities, enter the sub-sector value as "Municipality"
        - For municipal service boards, enter the sub-sector value as "Municipal Service Board"
        - For post-secondary institutions, enter the sub-sector value as "College" or "University"
        - For public hospitals, enter the sub-sector value as "Acute/Chronic Hospital", "Acute Hospital", or "Chronic Hospital"
        - For school boards, enter the number of average hours per week that the property is operating for
    e. Custom ID 3 Name –
        - Enter the term "Number of Portables" in the space for this field if you are reporting on behalf of school boards.
        - Enter the term "Weekly Average Hours" in the space for this field if you are reporting on behalf of municipalities, municipal service boards, post-secondary institutions or hospitals
    f. Custom ID 3 Value –
        - For municipalities, municipal service boards, post-secondary institutions or hospitals, enter the number of average hours per week that the property is operating for
        - For school boards, enter the number of portables that the school has

Important: The ministry will not be able to report data correctly if you do not enter the correct custom ID information for your property.

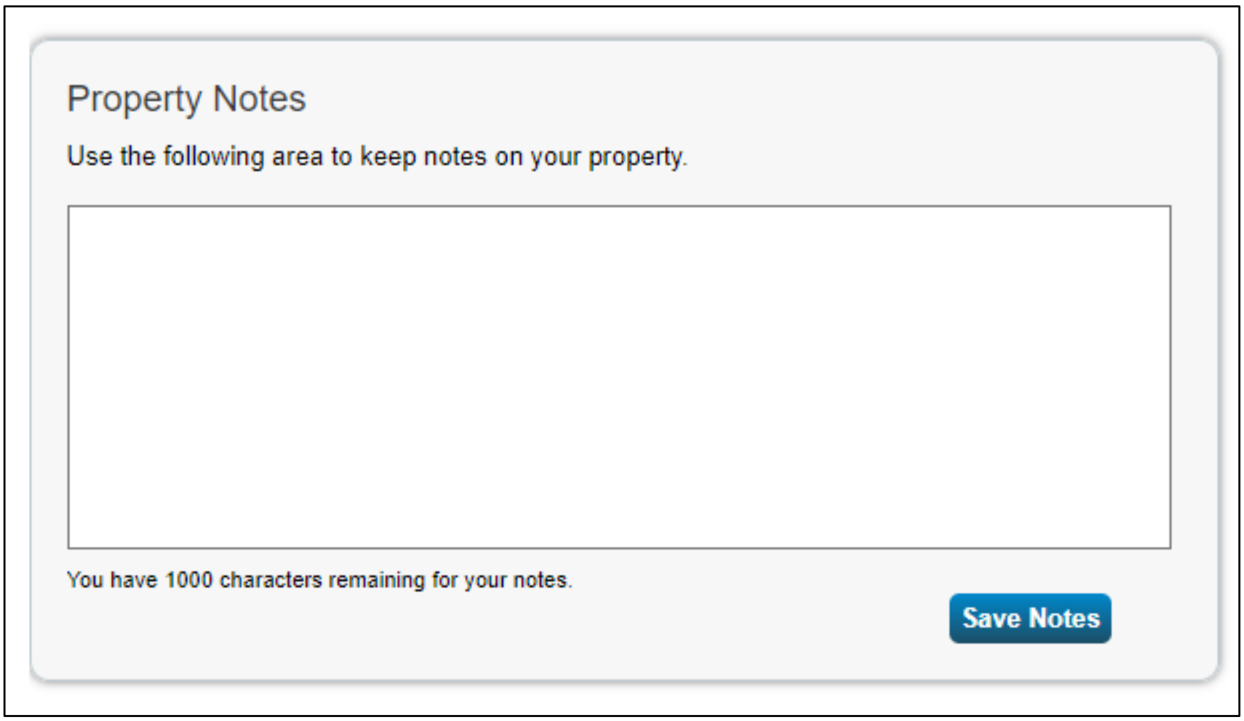


4. Click on the **Save** button to confirm your changes and proceed to the next step.

2.3 – Adding Property Notes

The following are the steps to add property notes to the property profile. This section is optional.

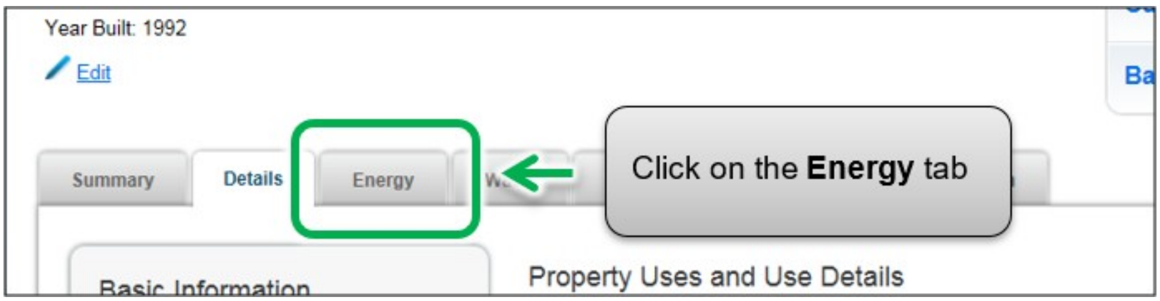
1. Once you have entered your Custom IDs and saved your changes, you will be returned to the **Details** tab page. Scroll to the lower part of the page and locate the **Property Notes** section. Click in the **Property Notes** field and enter the any additional information you would like to for this property. Then click on the **Save Notes** button just below the field to save your changes.



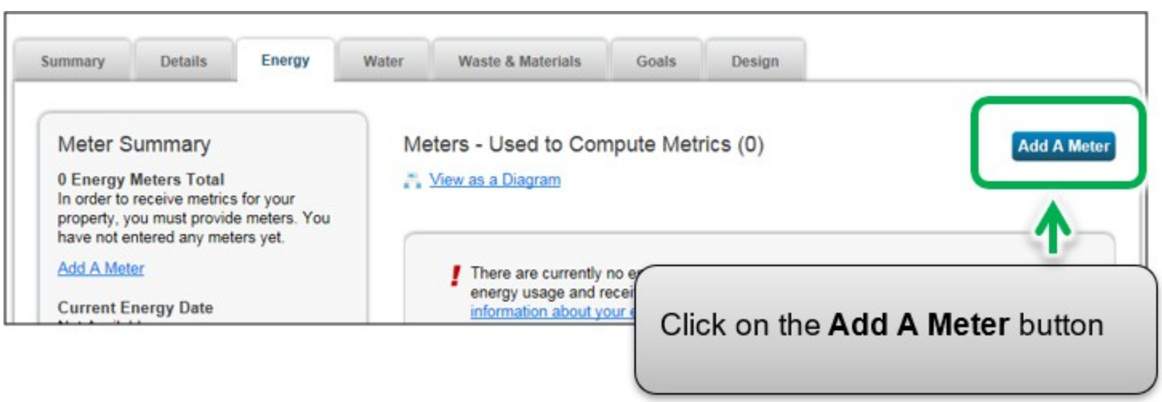
2.4 – Adding Energy Meters and Energy Consumption Data

The following are the steps to add an energy meter to the property profile.

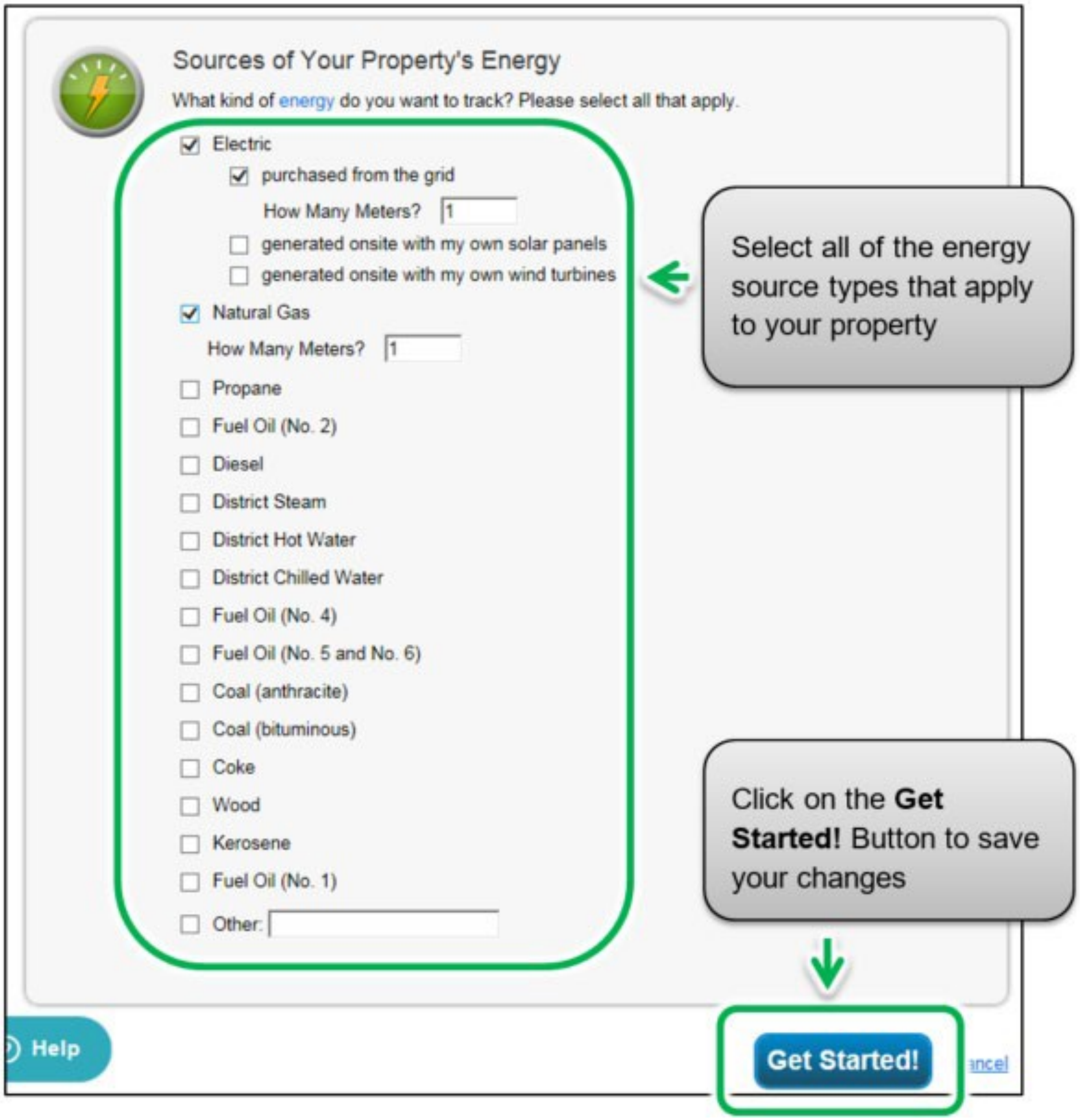
1. Continuing from the previous section, scroll to the top of the property profile page and click on the **Energy** tab.



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

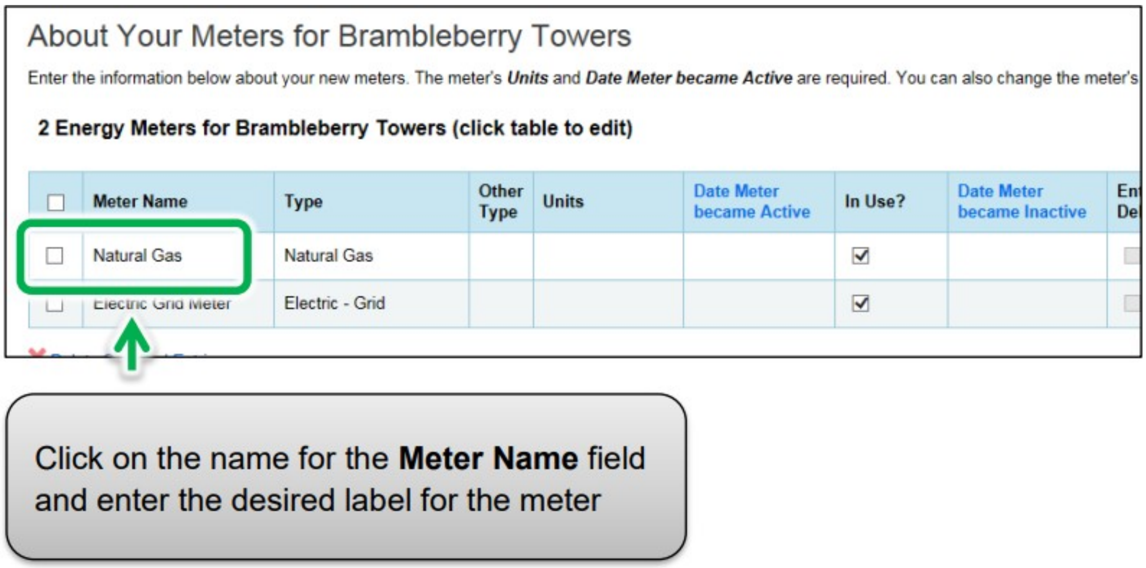


3. The screen will reload to show the **Sources of Your Property's Energy** page. You will be presented with a list of energy source types – some are normally metered (e.g., electricity and natural gas) while others are often measured another way (e.g., propane and wood). Select all of the types that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

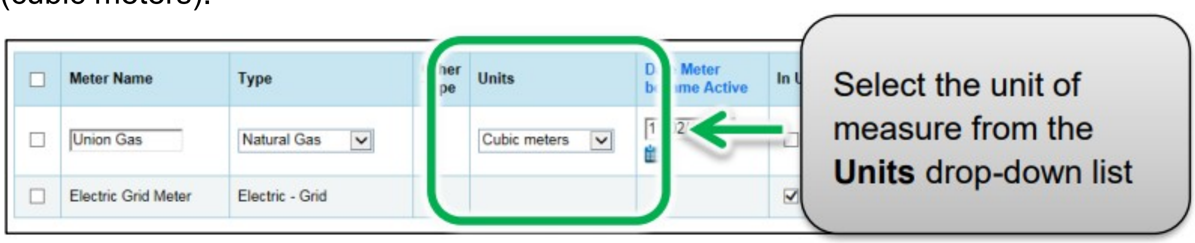


4. Click on the **Get Started!** button and proceed to the next step.

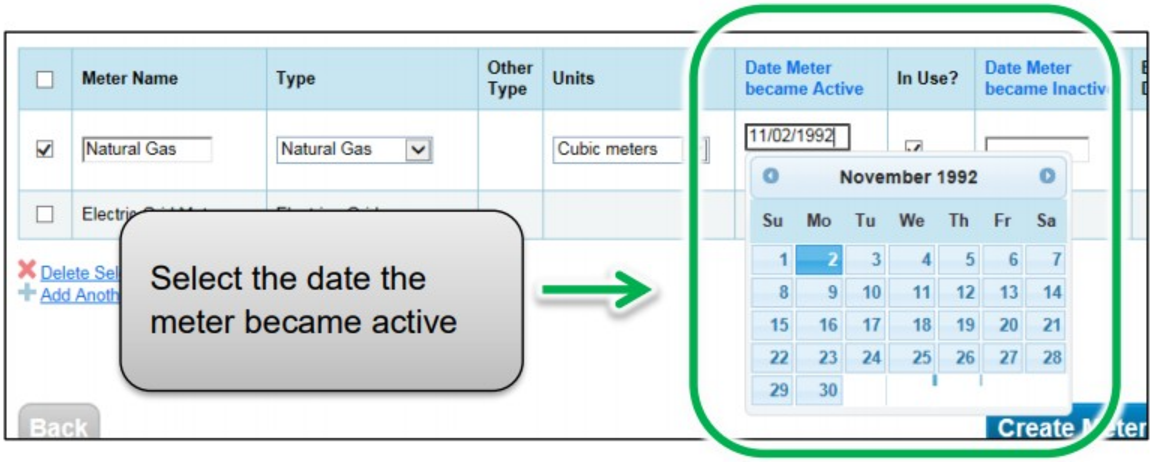
5. The page will reload to show the **About Your Meters** page with a table listing the meter types you selected in the previous step. Under the **Meter Name** column, click on the name for the first meter type listed and enter the desired label for the meter.



6. 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^3 (cubic meters).

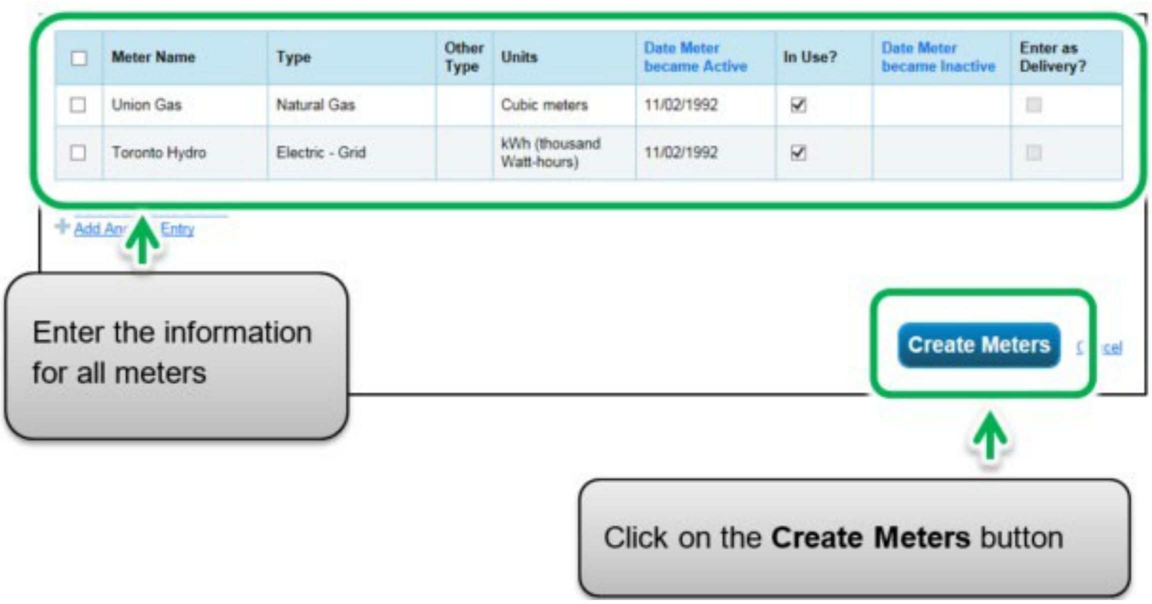


7. Under the **Date Meter became Active** column, click on the calendar icon and select the date the meter became active. Portfolio Manager will only allow you to enter usage data with dates later than the date the meter became active.



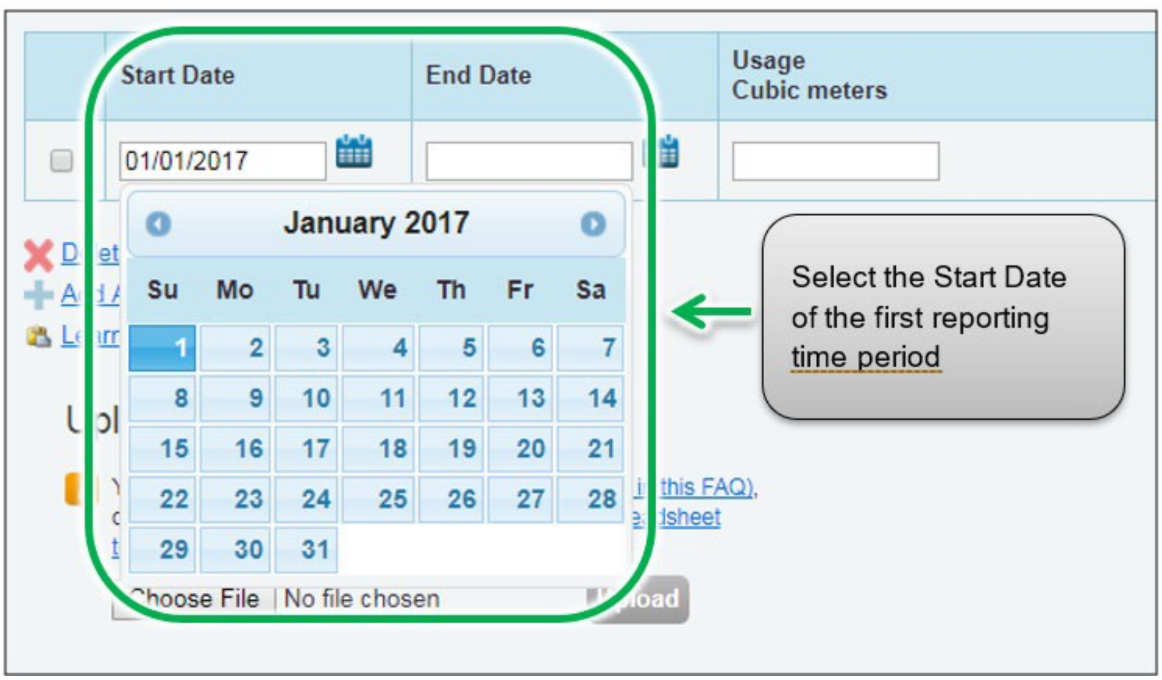
8. If you have specified more than one energy source/meter type for the property, repeat steps 5 through 7 for each type.

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.



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.



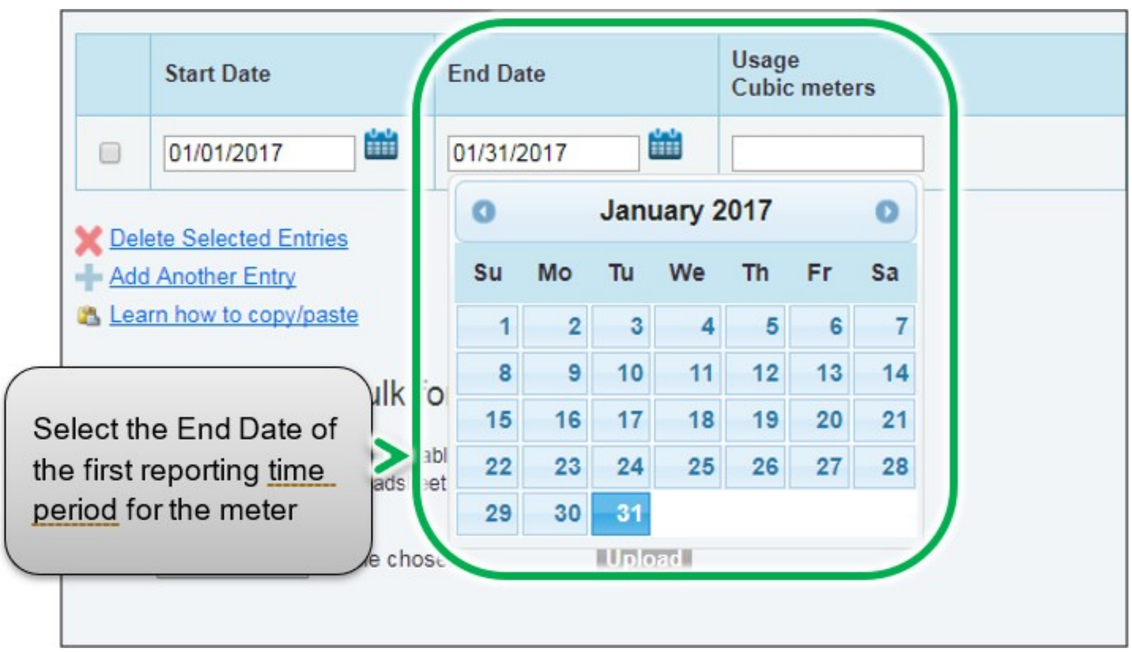
Note: If you are unable to obtain meter consumption data that begins on January 1 and ends on December 31, you can enter data that includes consumption outside of the reporting year. Portfolio Manager will then prorate the consumption data.

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

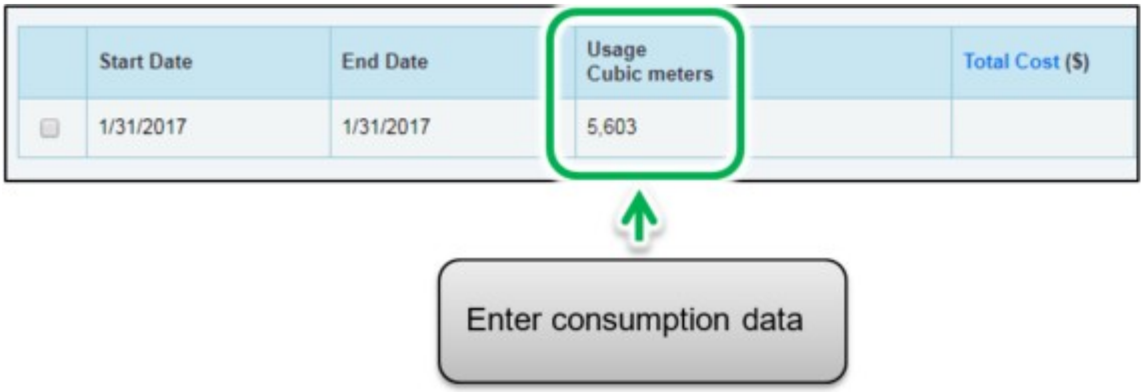
- The first reporting time period you enter will have a Start Date of December 21, 2017 and an End Date of January 20, 2018.
- The second reporting time period will have a Start Date of January 21, 2018 and an End Date of February 20, 2018.
- The final reporting time period will have a Start Date of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

Note: Billing cycles cannot overlap. This will result in an error.

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.

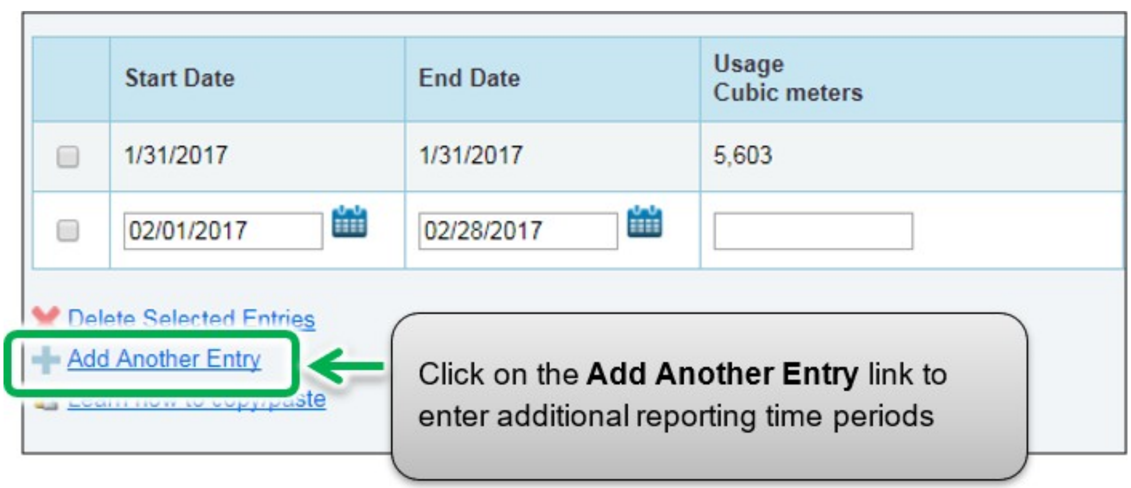


13. Enter the consumption data for the selected reporting time period. If the building has not consumed energy at this meter or source during the time period, ‘0’ must be entered.



Note: You can also enter your cost information in the **Total Cost** information field, but the BPS regulation does not require it.

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.

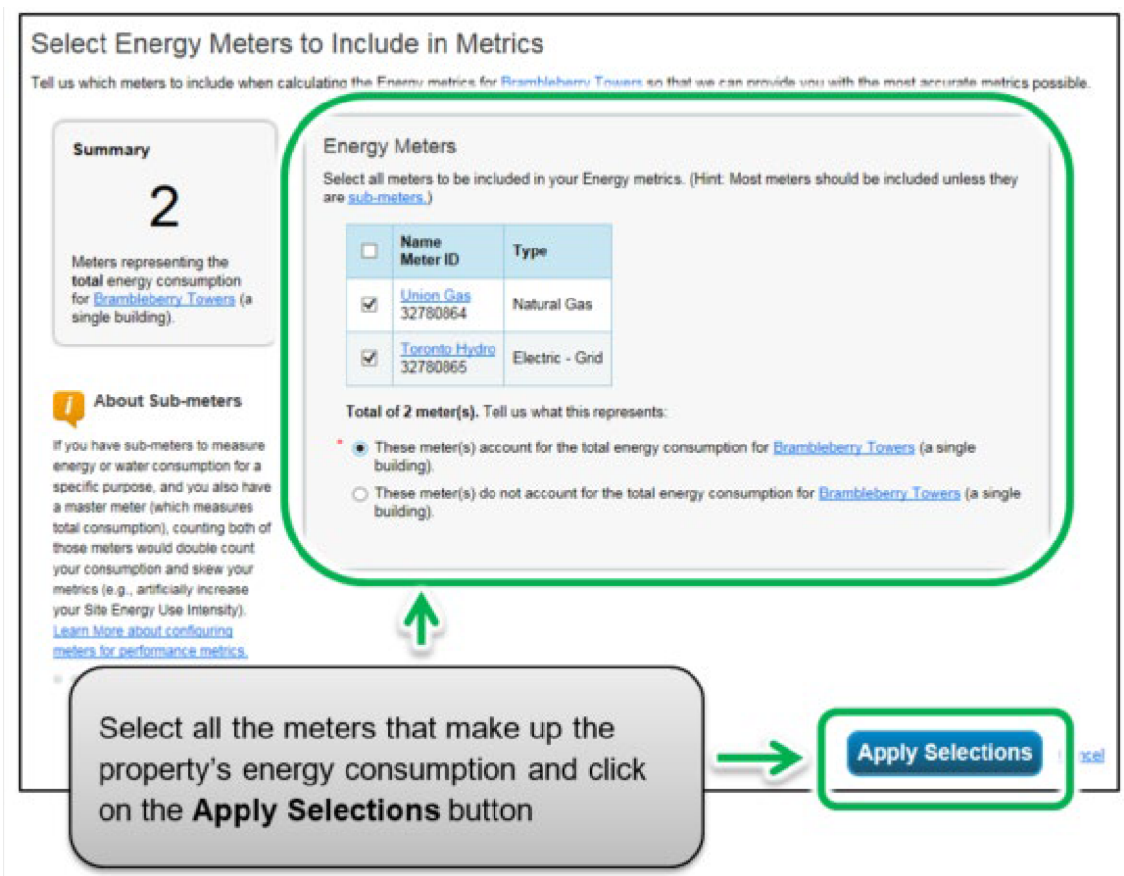


15. When you have completed entering consumption data for the full year in the section for the first meter, scroll to the section for the next meter (if you have more than one) and repeat steps 10 through 14 for each meter that makes up the property's energy use.

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.

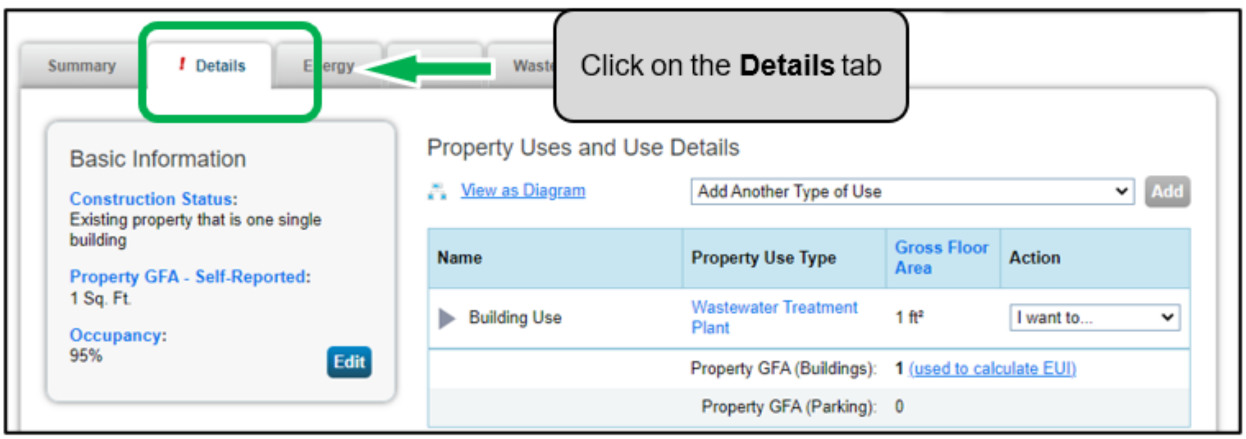
17. The page will reload to show the **Select Energy Meters to Include in Metrics** page. Select all the meters that make up the property's energy consumption and click on the **Apply Selections** button to complete the process and continue to the next section.



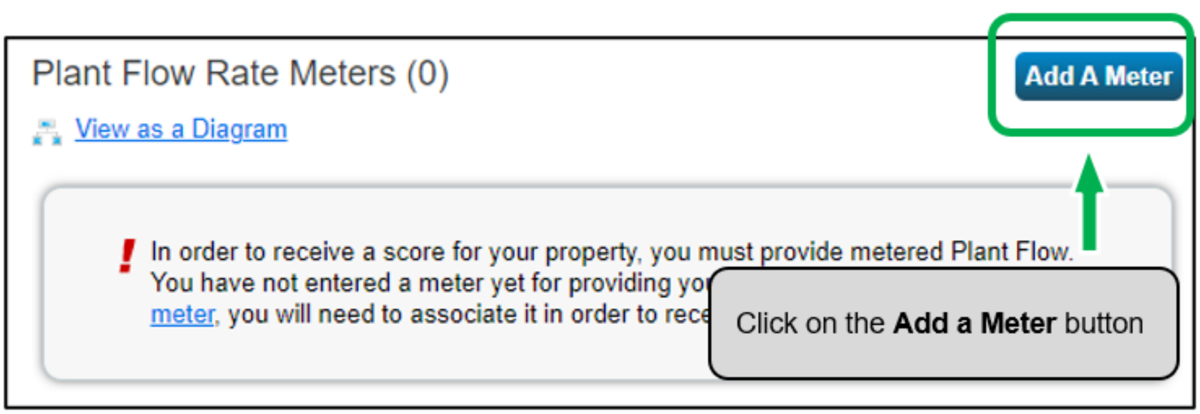
2.5 – Adding Volumetric Flow Rate of Water and Wastewater

The following are the steps to add volumetric flow rate information for properties related to the treatment of water or sewage that are operated by a municipal service board and/or a municipality.

1. If the operation is related to the treatment of water or sewage and is operated by a municipal service board and/or a municipality, the regulation requires additional information identifying the volumetric flow rate of water/sewage treated. The volumetric flow rate can be reported in millions of gallons per day or cubic meters per day. This information can be updated/edited in Portfolio Manager under the Plant Flow Rate Meters in the Details tab.
2. Continuing from the previous section, scroll to the top of the property profile page and click on the **Details** tab.



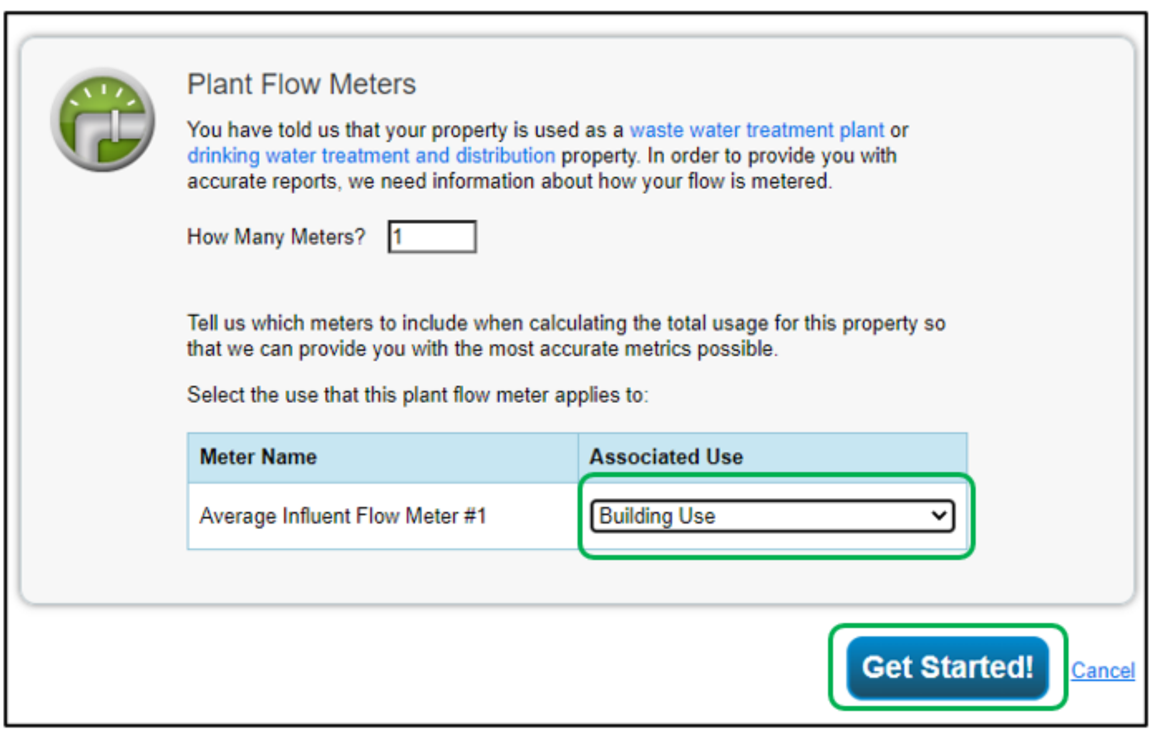
3. Scroll to the lower part of the page and locate the **Plant Flow Rate Meters** section. Click on the **Add a Meter** button.

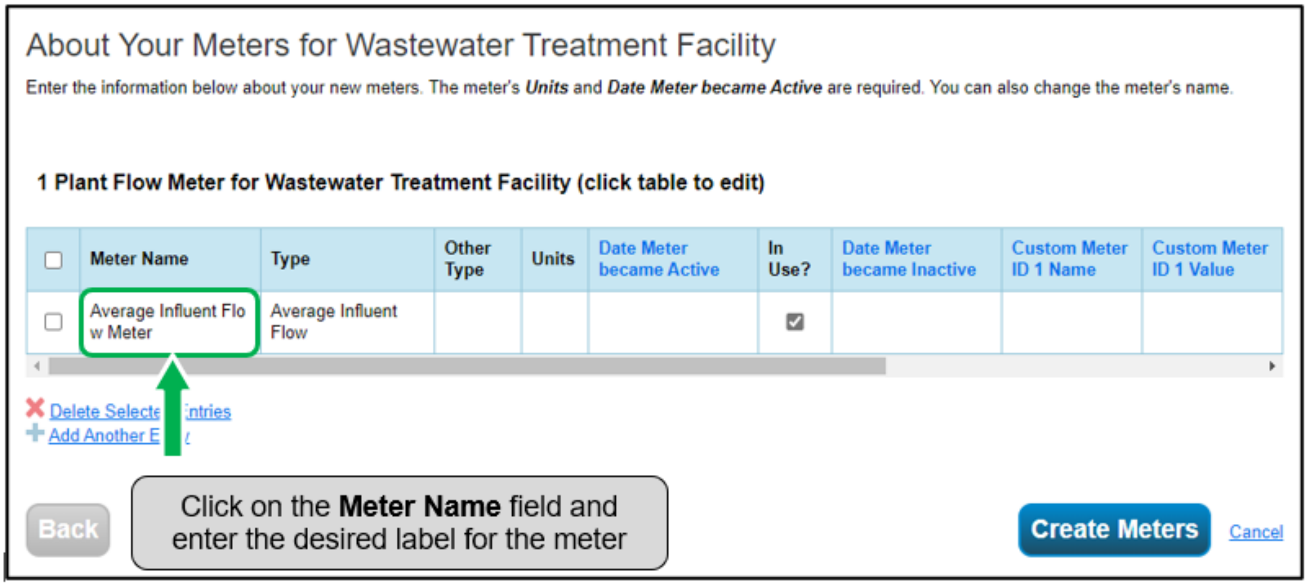


4. The screen will reload to show the **Plant Flow Meters** page. Enter 1 unless you want to report multiple meters, in which case report the number of plant flow meters you would like to report.

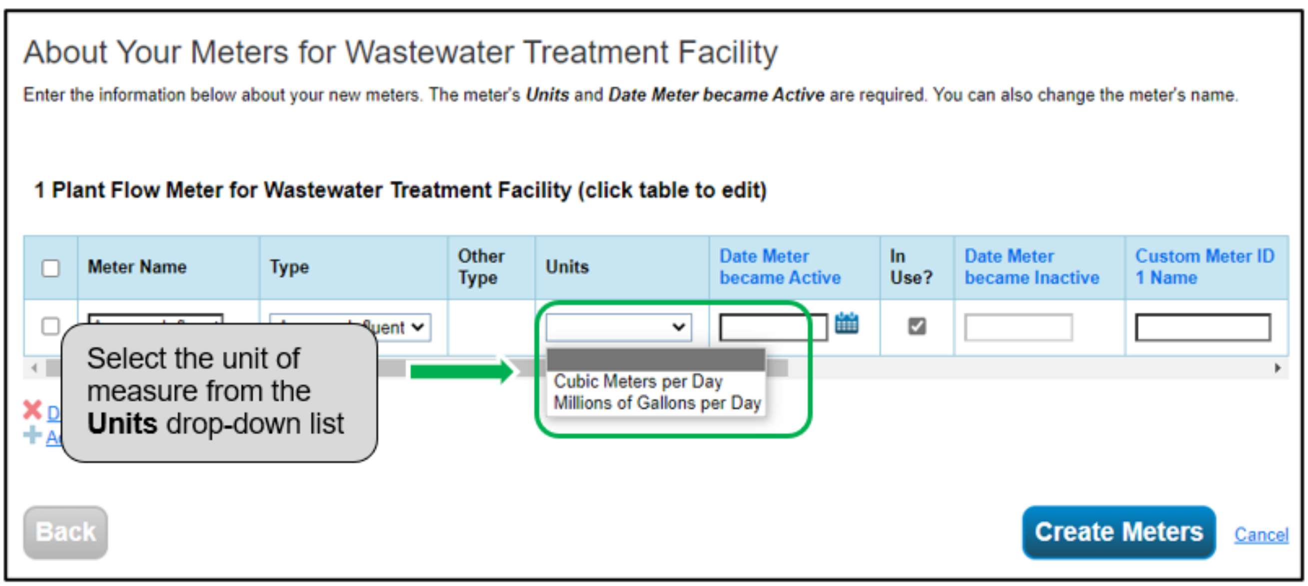
5. Click on the **Get Started!** button and proceed to the next step.

6. The page will reload to show the building use that this plant flow rate meter applies to. Select building use and click on the **Get Started** button again.





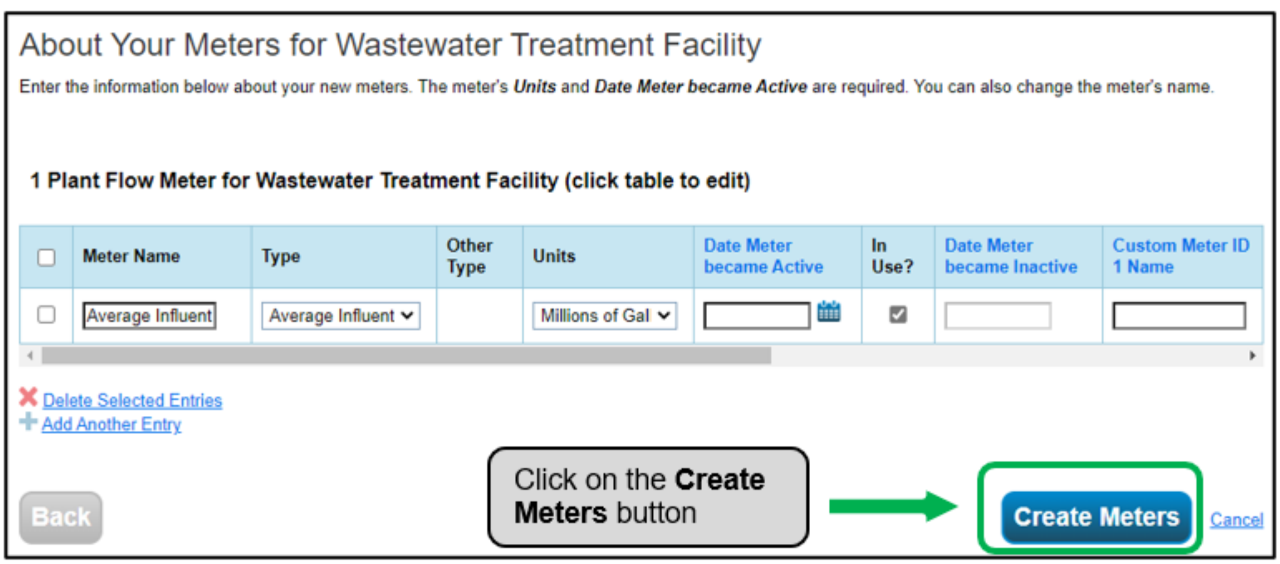
7. Click the cell in the **Units** column. The fields for the meter will become active and you can select your preferred unit of measure for the meter type.



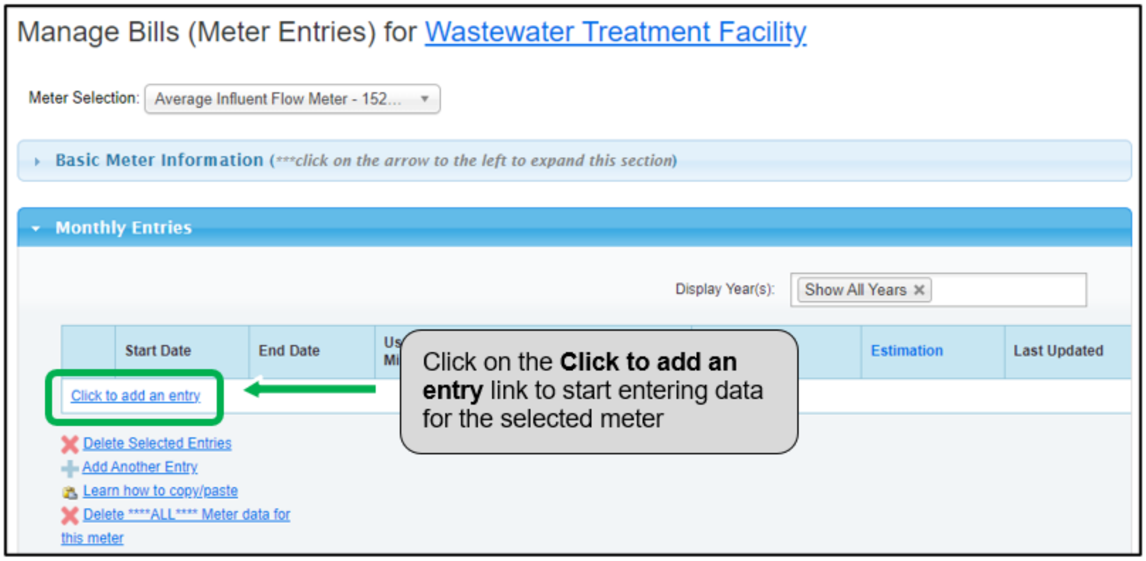
8. Under the **Date Meter became Active** column, click on the calendar icon and select the date the meter became active. Portfolio Manager will only allow you to enter usage data with dates later than the date the meter became active.

9. If you have specified more than one plant flow meter for the property, repeat steps 5 through 7 for each meter.

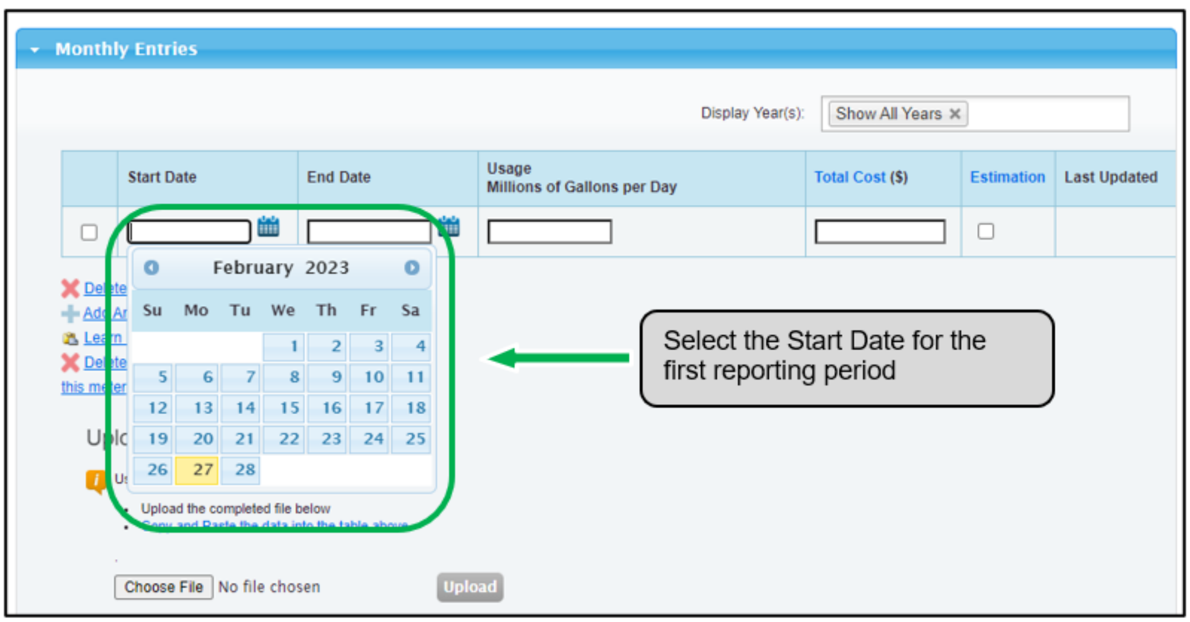
10. Once you have entered the necessary information, for all meters, click the **Create Meters** button to confirm your changes and proceed to the next step.



11. 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.



12. 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 flow rate data that begins on January 1 and ends on December 31, you can enter data that includes flow rate outside of the reporting year. Portfolio Manager will then prorate the data.

Example: You need to report your plant flow rate data from January 1, 2018 to December 31, 2018 and your billing cycle ends on the 20th of every month.

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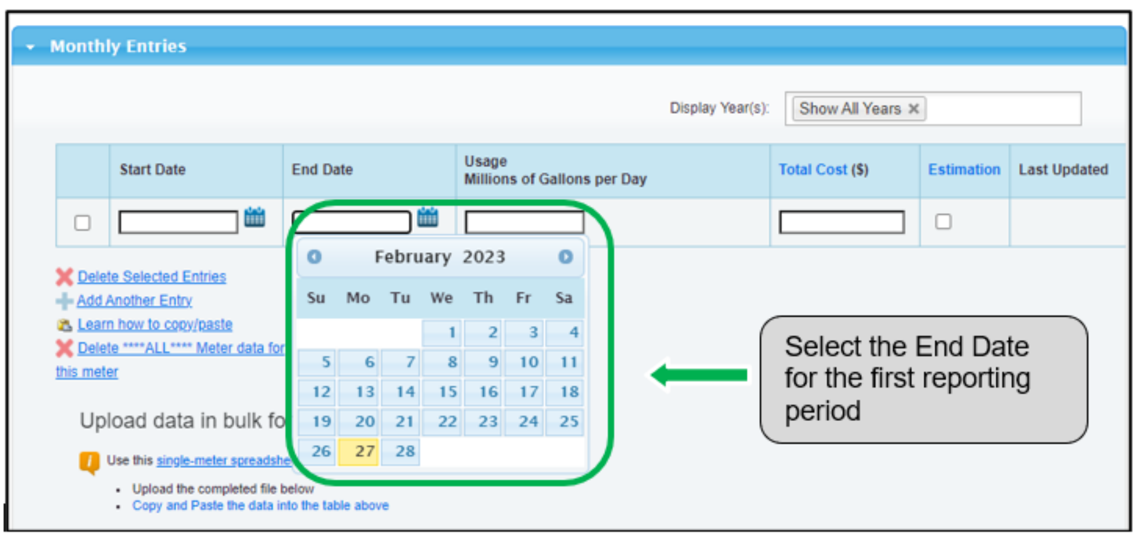
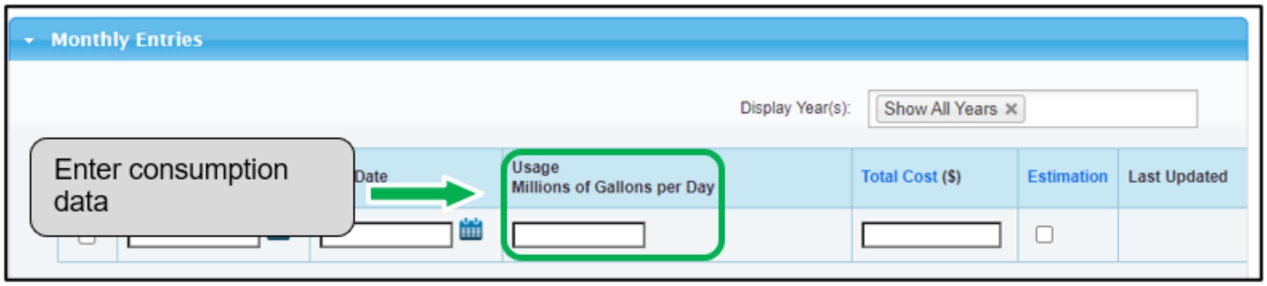
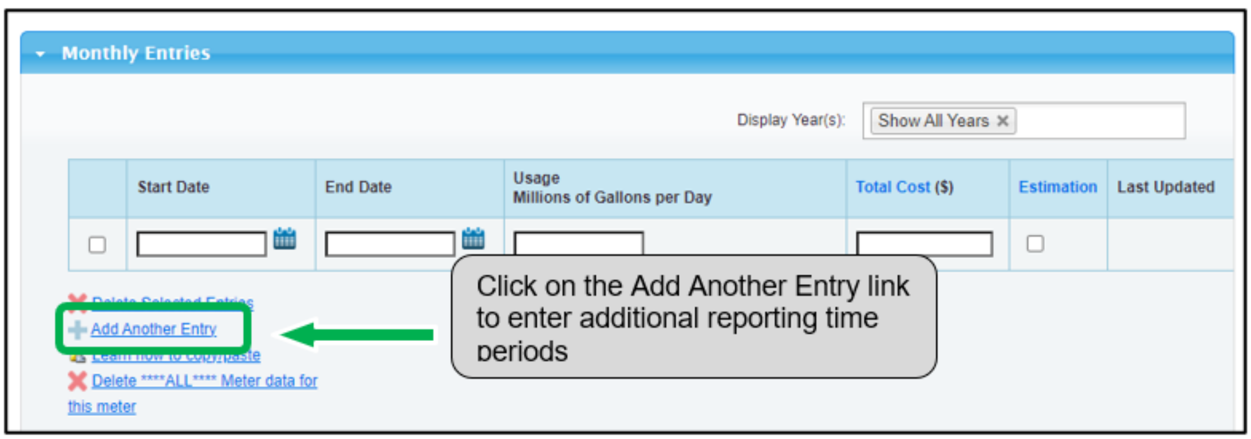


14. Enter the consumption data for the selected reporting time period. If the building has not consumed water at this meter during the time period, enter ‘0’.



Note: You can also enter your cost information in the **Total Cost** information field, but the BPS regulation does not require it.

15. Click on the **Add Another Entry** link and repeat steps11 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.



16. 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 plant flow rate.

17. When you have entered all of the consumption data for all of the meters, click on the **Save Bills** button to save this entry.

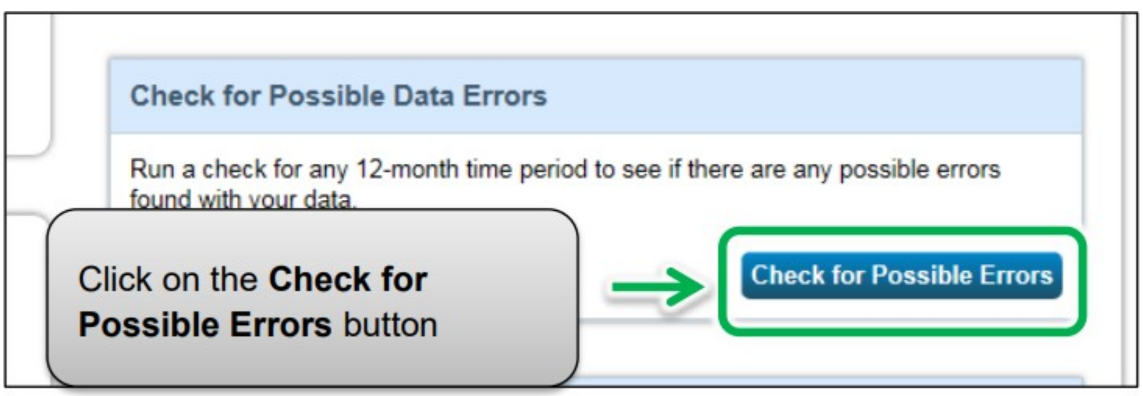
2.6 – Checking for Possible Errors

Important: The Data Quality Checker is NOT a substitute for data verification because it does not identify all issues. See the next section for more details on data verification.

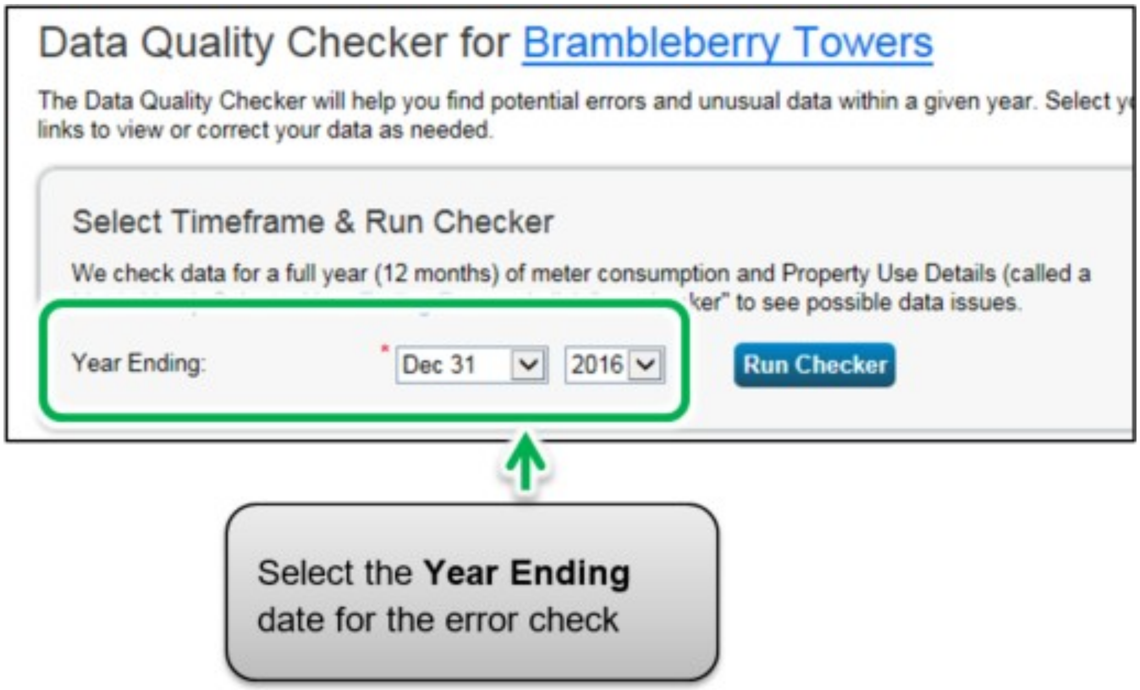
The following are the steps to check for possible errors in your property's profile.

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

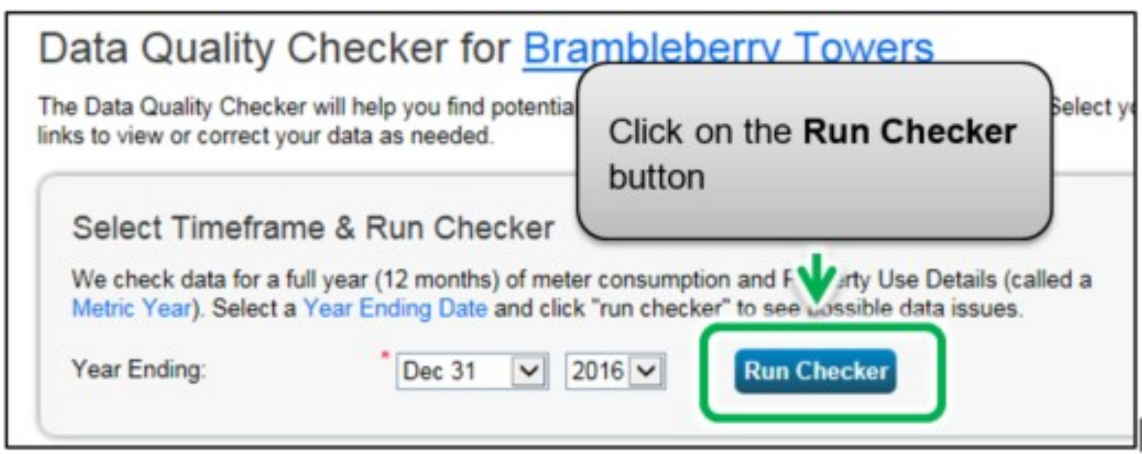
2. The screen will reload to show the **Summary** tab page. Scroll down the page and locate the **Check for Possible Data Errors** section. Click on the **Check for Possible Errors** button.



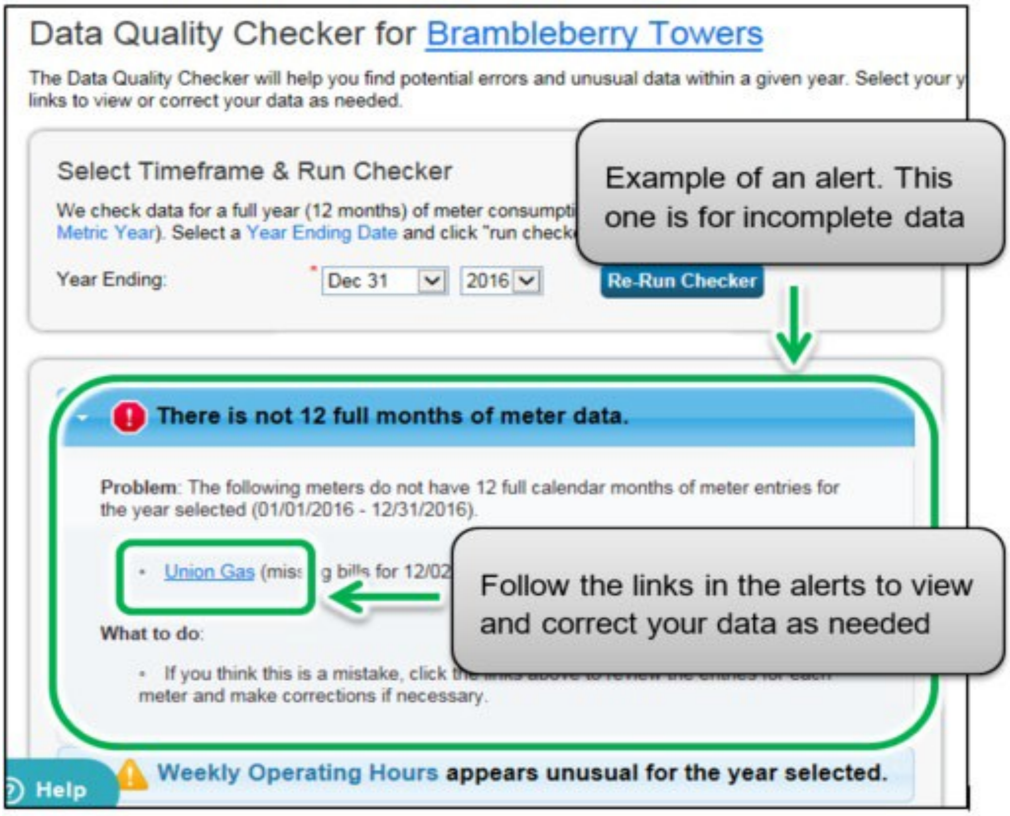
3. The screen will reload to show the **Data Quality Checker** page. Select the **Year Ending** date for the error check – it will be December 31 of the year for which you are reporting data.



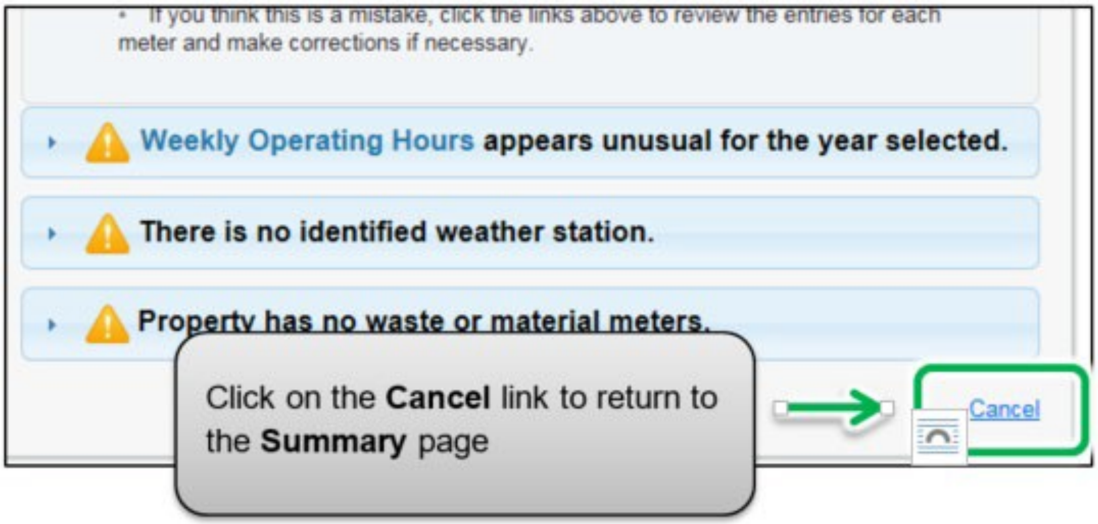
4. Click on the **Run Checker** button to initiate the property profile check.



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.



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.



2.7 – 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**.

2.8 – Submitting Your Report

During the submission process, you will receive a link to submit information for your buildings. Once you have added all your properties and their energy use information to Portfolio Manager, you can submit your report.

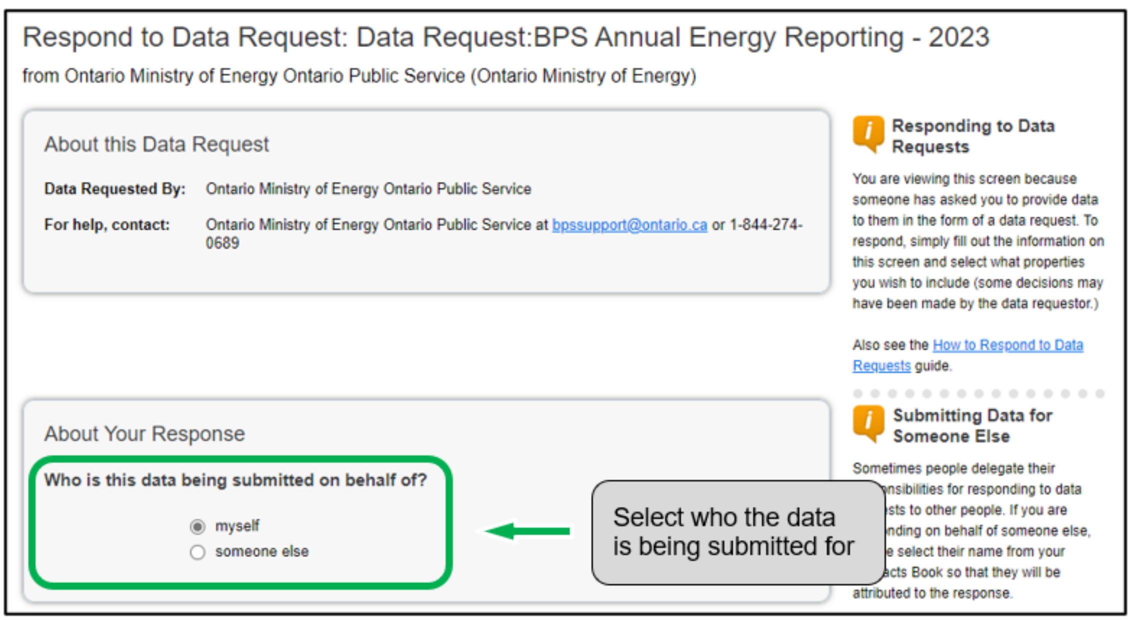
The following are the steps to complete the submission process.

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

   https://portfoliomanager.energystar.gov/pm/reports/dataRequest/accept/0a4e12c4-0f4a-4891-ba13-32f23c00f538

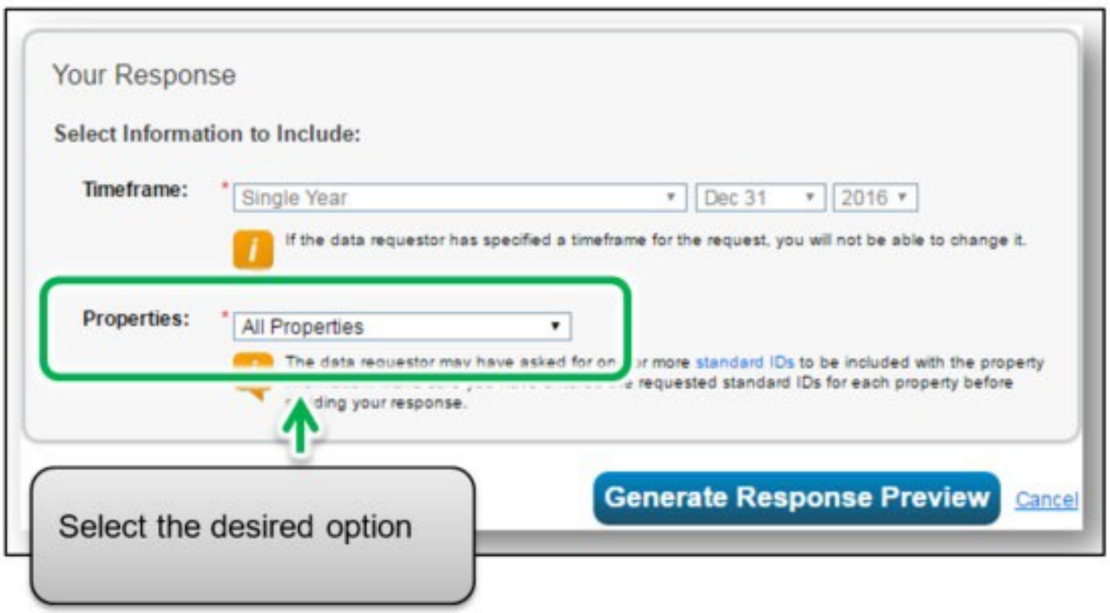
   Or, you can copy the link above and paste it into the address bar of your web browser.

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.

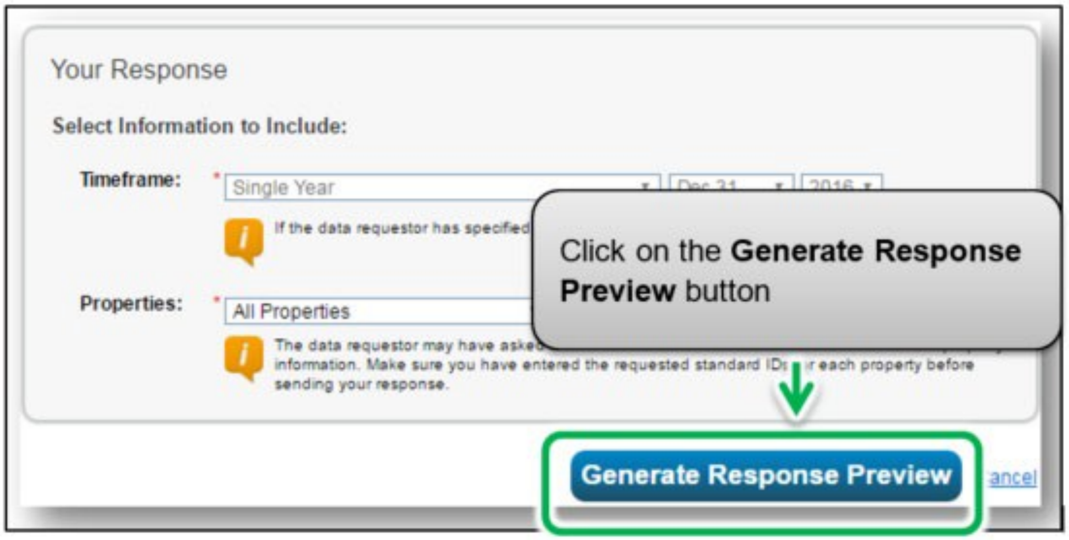


3. In the bottom part of the page, the **Your Response** section shows the timeframe of the request (this is specified by the Ministry of Energy and cannot be changed). From the **Properties** drop-down list, select one of the following options:

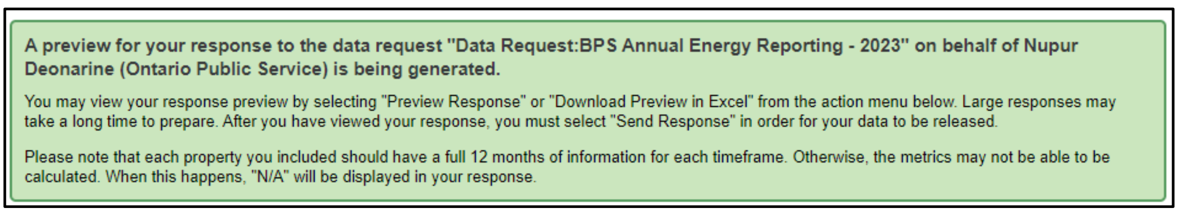
    a. **One Property** – You will be prompted to select a single property from your portfolio for the submission.
    b. **Multiple Properties** – You will be prompted to select a group of properties from your portfolio for the submission.
    c. **All Properties** – This option will include all properties from your portfolio for the submission.



4. Click **Generate Response Preview**.



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

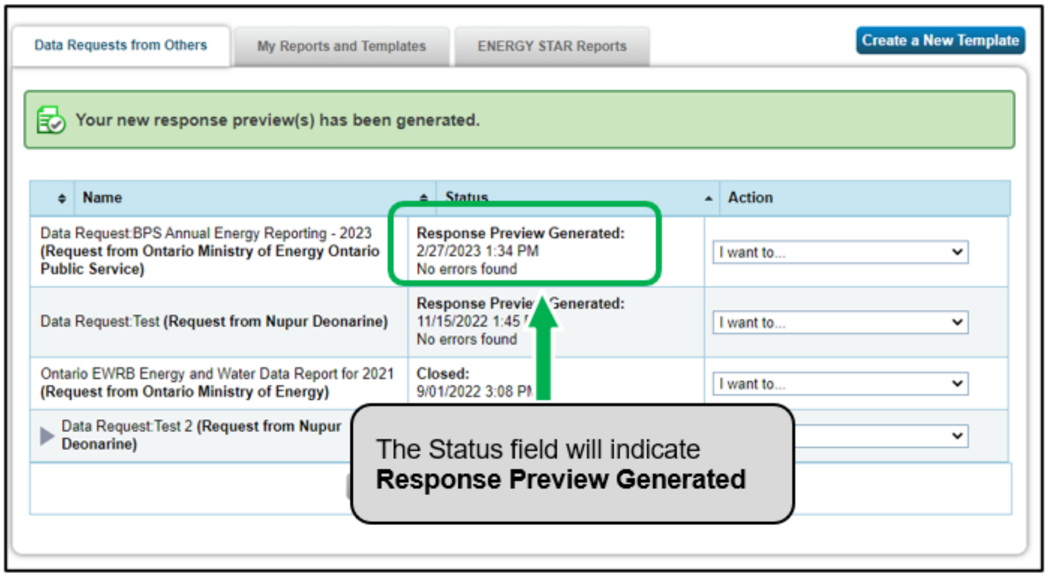


A preview for your response to the data request "Data Request:BPS Annual Energy Reporting - 2023" on behalf of Nupur Deonarine (Ontario Public Service) is being generated.

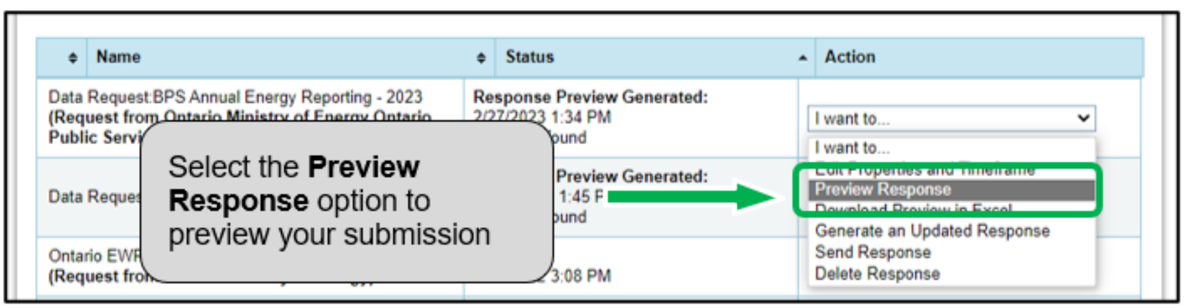
You may view your response preview by selecting "Preview Response" or "Download Preview in Excel" from the action menu below. Large responses may take a long time to prepare. After you have viewed your response, you must select "Send Response" in order for your data to be released.

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 “**Response Preview Generated”** message once the preview is generated.



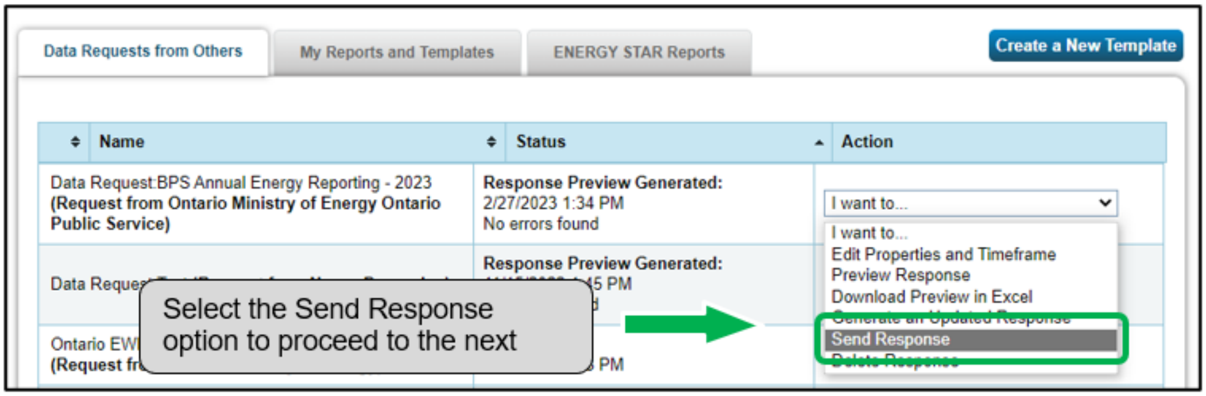
6. From the **Actions** drop-down list, select the **Preview Response** option to preview your submission if you want to preview your response. Otherwise, go to step 9.



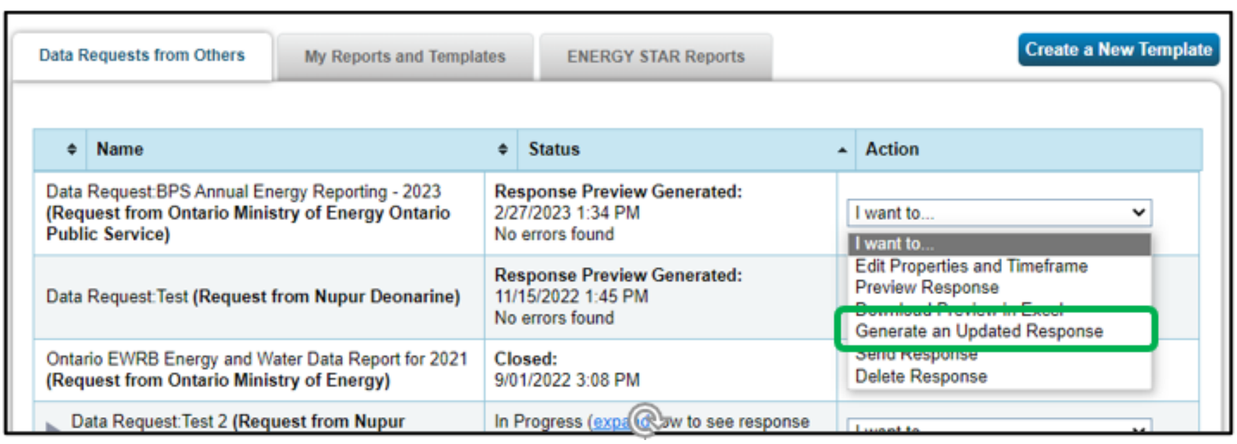
7. The **Reporting** tab will reload to show the **View Report** page. The page will include the **Information and Metrics** table displaying the property data that will be included in your submission. Use the page scroll bars to view the full details of the property data that will be submitted to the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

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

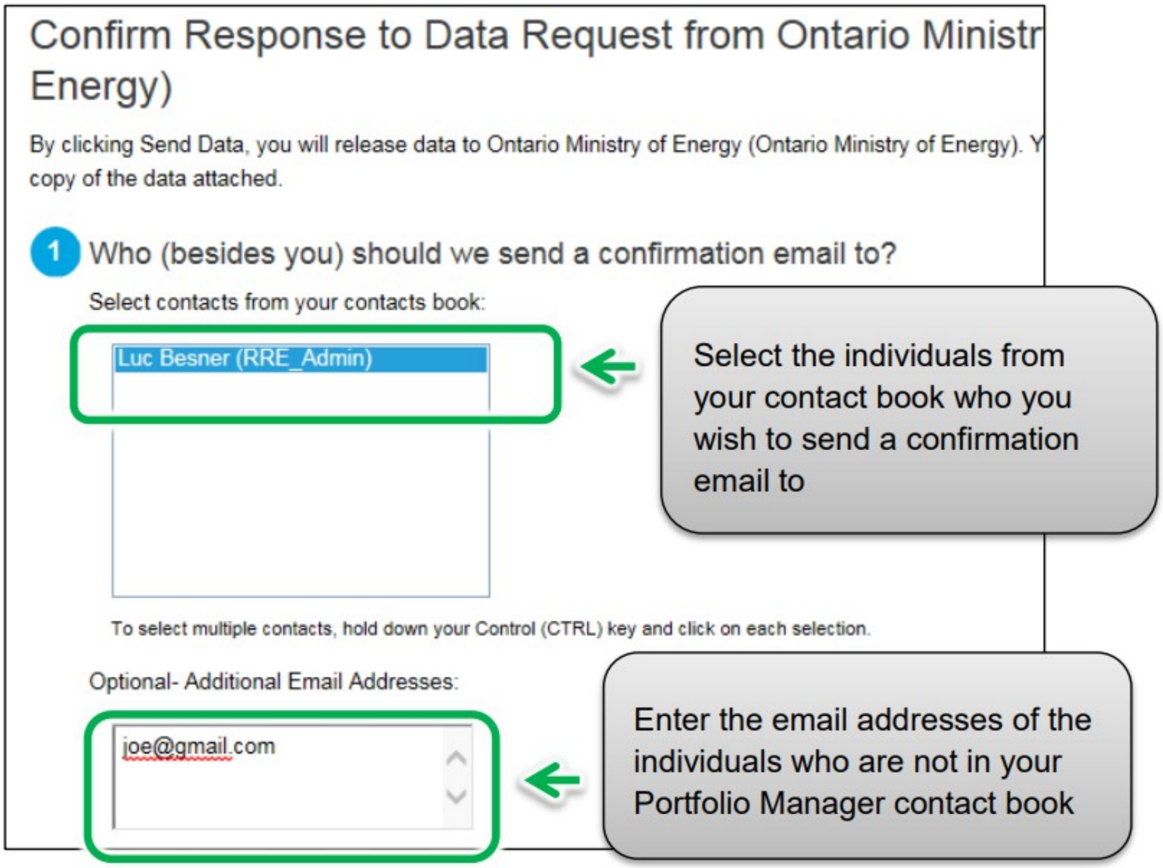
9. You will be returned to the Reporting tab. Scroll down to the **Templates & Reports** table and locate the generated data request. Select the **Send Response** option from the **Action** drop-down list to proceed to the next step.



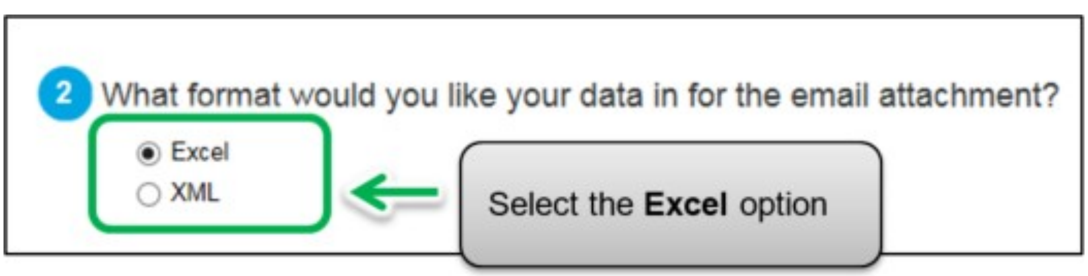
Important: In some cases, you may want to add or update information after you have already sent your submission to the Ministry of Energy (for example, if you realize that your information is incomplete, or something has changed since you submitted your information). To do this, first update only the 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.



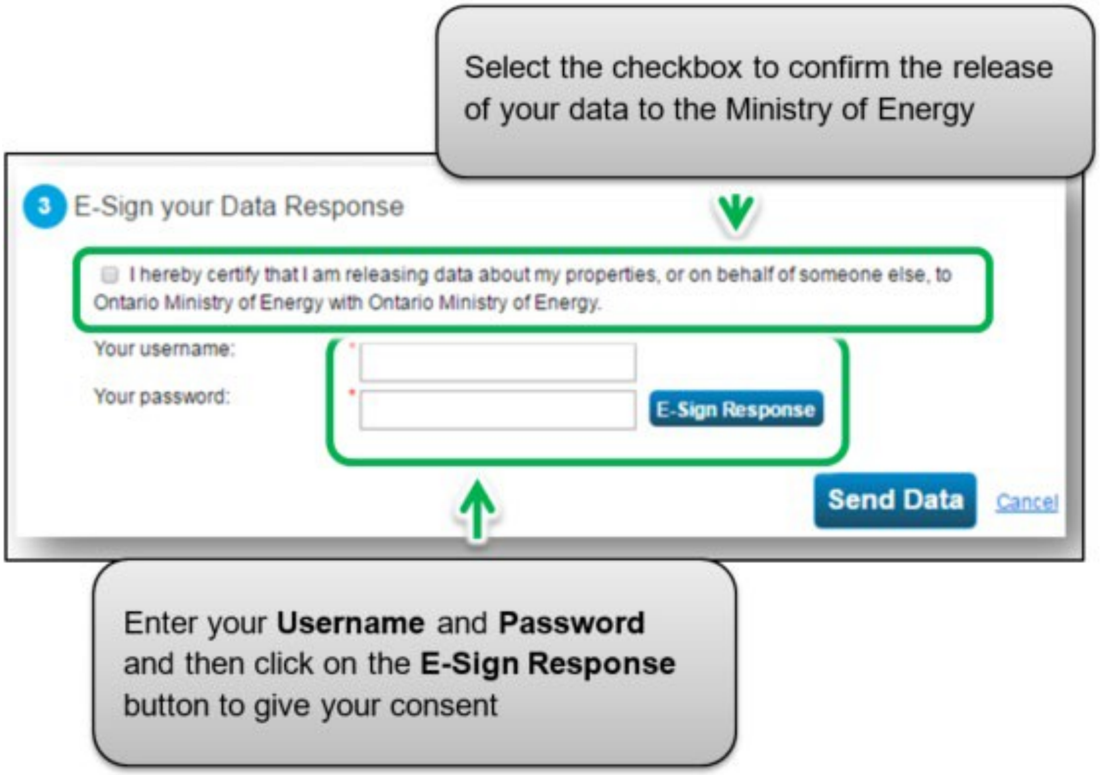
10. Once you have selected the **Send Response** option, you will be brought to a response confirmation page. Under section "**1**", from the **Select contacts** list box, select the people from your contact book you wish to send a confirmation email to. In the **Additional Email Addresses** box, enter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



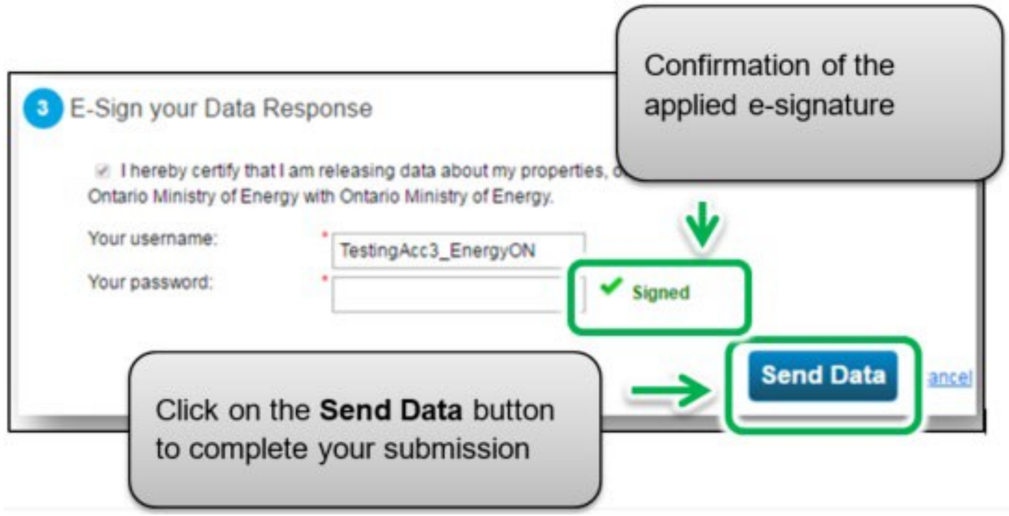
11. Under the "**2**" section, select the **Excel** option as the email attachment format.



12. In section “**3**”, select the checkbox to confirm the release of your data to the Ministry of Energy. 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 a message confirming that your submission was completed successfully.

You will receive a confirmation email from the ministry with a receipt and copy of the data that you submitted.

You will also receive an email confirmation shortly afterwards from Portfolio Manager.


From: donotreply@energystar.gov
Sent: Tue 11/21/2017 5:17 PM
To: [redacted] Luc (MGCS)
Cc:
Subject: Receipt for Data Request Submittal
Message
responseData.xlsx (8 KB)

Dear Luc [redacted]

This is to confirm the receipt of the following Data Request:

Response sent: 11/21/2017 5:17 PM

Response includes: 1 properties

Response sent to:
Ontario Ministry of Energy
Ontario Ministry of Energy
77 Grenville Street
Toronto, ON M7A 2C1

Response sent by:
Luc [redacted]
MGCS
77 Grenville Street
Toronto, ON M5S 1B3

To know that you have successfully completed reporting, you must receive two emails:

1) Confirmation email from the Ministry of Energy
2) Confirmation email from Portfolio Manager

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

Definitions

Energy Star Score – The Energy Star Score helps building owners understand their energy consumption and how they are performing by comparing their usage to similar buildings nationwide. A score of 75 or higher indicates that your building is a top performer and your building may be eligible for Energy Star Certification. The Energy Star website provides more details on how Energy Star Scores are calculated.

Energy Use Intensity (EUI) – EUI describes a building's energy use as a function of its size or other characteristics. For property types in Portfolio Manager, EUI is expressed as energy per square foot per year. It's calculated by dividing the total energy consumed by the building in one year (measured in kBtu or GJ) by the total gross floor area of the building (measured in ft^2 or m^2).

BPS Energy Reporting – Acronym for the Broader Public Sector Energy Reporting initiative for the Ministry of Energy. The BPS energy reporting initiative collects annual energy consumption information from public agencies in Ontario.

BPS Reporting Period – BPS Reporting Period refers to the yearly reporting period from January 1st to July 1st. During the reporting period, public agencies are required to submit their annual energy consumption information through Portfolio Manager.

Portfolio Manager – Portfolio Manager is a third-party application by Energy Star. It is the data entry and collection application for public agencies to report their annual energy consumption information.