

How to Get Utility Data into Portfolio Manager

EPA’s ENERGY STAR Portfolio Manager tool helps you measure and track the energy and water use, waste and materials, and greenhouse gas emissions of your buildings, all in a secure online environment. You can use the tool to identify under-performing buildings, set investment priorities, verify efficiency improvements, and receive EPA recognition for superior energy performance.

Entering utility data is quick and easy with Portfolio Manager. There are three ways to enter energy, water, and waste data for your property or portfolio:

- ✓ Work with third-party providers that exchange data directly with Portfolio Manager via web services.
- ✓ Enter data manually (create/update one meter at a time).
- ✓ Upload data using spreadsheet templates (create/update multiple meters at once).

Option 1: Using Web Services

Many utilities and service providers (such as utility bill payment companies, software-as-a-service providers, and energy consultants) may already be set up to exchange data directly with Portfolio Manager via web services. Here’s how to take advantage of this offering (where available):

- ✓ Determine if your utility or third-party service provider is capable of exchanging data directly with your Portfolio Manager account. A growing number of utilities make this service available to customers for free, while other energy service providers include this functionality as part of their fee-based offerings.
- ✓ Visit the list of energy service providers that exchange data with Portfolio Manager at www.energystar.gov/dataexchangemostactive.
- ✓ Check to see if your local utility offers web services using EPA’s [interactive utility data access map](#), the [utility data fact sheet](#), and/or directly within the Portfolio Manager interface.

To find and connect with your utility via Portfolio Manager, first navigate to your property’s **Energy** tab. If your property is located in the service territory of an electric utility that supports Portfolio Manager web services, you will be able to click a link to learn more and to “connect” with the utility’s account.

- ✓ Note that the utility or service provider may require further information before a connection request can be accepted. Please reach out to the respective provider(s) as needed to ensure that you are aware of the specific steps they require in order to initiate this process.
- ✓ Once your connection request has been accepted, you will be able to share specific buildings and/or meters with the selected utility/service provider, which can then update your data through an automated process. For more details on the connection and sharing process, see the resource “How to Share Data



Connecting with Your Utility in the Portfolio Manager Interface

with other Portfolio Manager Users.” As with the “connection” step, your provider(s) may require additional actions to initiate a share that go beyond the Portfolio Manager sharing functionality (e.g., confirmation of your property’s address and/or list of tenants in a separate utility platform).

- ✓ Once your sharing request has been accepted, the organization you connected with will be able to update some or all of your property data directly into Portfolio Manager, according to the level of access you provided.
- ✓ If your utility is not currently able to exchange data directly with Portfolio Manager, they may still be able to provide the aggregate whole-building data needed to benchmark in a consolidated spreadsheet format. This information is noted in the Utility Data Access Map and Fact Sheet linked above.

Option 2: Entering Utility Data Manually

With the help of step-by-step prompts and guidance, entering utility data manually into Portfolio Manager is easy. Follow these steps to add meters and enter bill data for any property in your Portfolio Manager account, including newly-added properties as well as those that have been in your portfolio for a while.

Creating a New Meter (or Meters)

On the main page of your property, click the **Energy, Water, or Waste & Materials** tab.

1. Click **Add A Meter**. Select the energy, water, or waste sources that apply to your property. For energy and water meters, select relevant sources, indicate how many meters you want to add for each resource type, and then click **Get Started!** For waste meters, choose the waste type and what you are doing with it, then click **Continue**. Then indicate how often it is collected, and when you started tracking. Click **Create Meter(s)** and proceed to Step 3.

About Your Meters for Sample Office (US)
Enter the information below about your new meters. (No meter's *Units* and *Date Meter became Active* are required. You can also change the meter's name.)

2 Energy Meters for Sample Office (US) (click table to edit)

| <input type="checkbox"/> | Meter Name | Type | Other Type | Units | Date Meter became Active | In Use? | Date Meter became Inactive | Enter as Delivery? | Custom Meter ID 1 Name |
|--------------------------|---------------------|-----------------|------------|-------|--------------------------|-------------------------------------|----------------------------|--------------------------|------------------------|
| <input type="checkbox"/> | Natural Gas | Natural Gas | | | | <input checked="" type="checkbox"/> | | <input type="checkbox"/> | |
| <input type="checkbox"/> | Electric Grid Meter | Electric - Grid | | | | <input checked="" type="checkbox"/> | | <input type="checkbox"/> | |

[Delete Selected Entries](#)
[Add Another Entry](#)

Back
Create Meters Cancel

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2. For energy or water meters, click on any empty cell in the table to edit information on the **About Your Meters** page.
 - a. Choose the appropriate units and then enter the start date of the first bill associated with each meter in the **Date Meter became Active** column.
 - b. If the meter is currently in use at the property, make sure the **In Use?** box is checked and leave the **Date Meter became Inactive** field empty.
 - c. Select the **Enter as Delivery?** checkbox if your energy source is obtained or delivered in bulk quantities, as opposed to being metered (e.g., fuel oil).
 - d. Scroll right to add up to three custom identifiers for each meter (optional).
 - e. Click **Add Another Entry** if you need to add another meter.
 - f. Click **Continue**.

3. On the **Your Meter Entries** page, click **Add Another Entry** to enter bill information for each meter.

- a. Enter the start and end date and usage for each entry.
- b. Select the **Estimation** checkbox to identify an entry as a non-measured value (e.g., your utility bill was returned as an estimation of your monthly usage and you expect to update the actual consumption later, when it becomes available).

- c. For energy, select the **Green Power?** checkbox if any of your energy usage was purchased from renewable energy sources. Provide details in the pop-up window, such as quantity, source, and generation location.
- d. For electric meters, you can choose to track demand and demand cost as optional values. For more information, please review the guide [How to Track Electric Demand in Portfolio Manager](#).
- e. For waste, you may optionally indicate the disposal destination.
- f. Once you're finished adding entries, click **Continue**.

4. After you click **Continue**, you will see the **Select Meters to Include in Metrics** page. On this page, you indicate which meters Portfolio Manager should use when calculating metrics for your property.

- a. Select which meters you want to include and what the meters measure, and then click **Apply Selections**.
- b. If the utility meters listed do not cover all utility consumption at the building, indicate the section(s) of the properties that your meters service.

! Avoid Double-Counting Energy Data

To ensure your energy is not double-counted, do not select both sub-meters and their master meter when specifying meters to add to total consumption.

! Data Errors

If there is an error in your meter data (e.g., overlaps or gaps greater than 1 day in your meter entry dates), Portfolio Manager will alert you of the error and direct you to the affected meter(s) so you can make the necessary edits.

Entering or Modifying Utility Data for Existing Meters

You can also enter utility data for existing meters in Portfolio Manager.

- ✓ On your property's main page, click the applicable meters tab. In the table below the trend chart, select the name of the Meter for which you want to add/edit data.
- ✓ On the **Manage Bills (Meter Entries)** page for your meter, click anywhere in the table to edit entries, select the checkbox next to any entry and click **Delete Selected Entries** at the bottom of the page to delete data, or click **Add Another Entry** to add more information. After you finish making changes or adding data, click **Save Bills**.

Option 3: Using Spreadsheet Uploads

Spreadsheet templates allow you to upload data quickly and easily into Portfolio Manager using a few steps. You can upload data for a single meter, for multiple meters at one property, or for multiple meters across multiple properties.

Uploading Data for a Single Meter

Follow these steps to upload data for a single meter:

1. Click the **Energy, Water, or Waste & Materials** tab of your property, and then click **on the Meter name for which you want to upload data.**
2. Click **spreadsheet template** at the bottom of the page, under “Upload Data in Bulk”.
3. Save the spreadsheet file that loads in your browser, and then open it to enter meter information. When you are finished entering information, save the spreadsheet to your computer. **NOTE:** Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.
4. When you’re ready to upload this file, go back to the **Manage Bills** page (where you originally generated the spreadsheet). You have two options:
 - a. **Copy & Paste.** Copy your data (but not the header row), by highlighting it and selecting Ctrl+C, then **Paste** it into an empty “Start Date” field by selecting Ctrl+V. Then “Save Bills.”
 - b. **Upload File.** Click Choose File and browse to the completed template you saved on your computer. Click **Open**, and then click **Upload**. Portfolio Manager then automatically enters the new meter entries for your property.

| | A | B | C | D | E | F | G |
|----|-----------------------|---------------------|------------------|-----------------|-----------------------|-------------------|------------------------|
| 1 | Start Date (Required) | End Date (Required) | Usage (Required) | Cost (Optional) | Estimation (Required) | Demand (Optional) | Demand Cost (Optional) |
| 2 | 12/14/2017 | 1/11/2018 | 497829 | 37337.19 | No | | |
| 3 | 1/12/2018 | 2/13/2018 | 582000 | 70000 | No | | |
| 4 | 2/14/2018 | 3/13/2018 | 444260 | 34000 | No | | |
| 5 | 3/14/2018 | 4/13/2018 | 443290 | 33000 | No | | |
| 6 | 4/14/2018 | 5/13/2018 | 503401.87 | 38922.86 | No | | |
| 7 | 5/14/2018 | 6/13/2018 | 495870.79 | 38340.56 | No | | |
| 8 | 6/14/2018 | 7/13/2018 | 566236.53 | 43781.21 | No | | |
| 9 | 7/14/2018 | 8/13/2018 | 613285.41 | 47419 | No | | |
| 10 | 8/14/2018 | 9/13/2018 | 700206.14 | 54139.64 | No | | |
| 11 | 9/14/2018 | 10/13/2018 | 562923.98 | 43525.08 | No | | |
| 12 | 10/14/2018 | 11/13/2018 | 469755.48 | 36321.33 | No | | |
| 13 | 11/14/2018 | 12/13/2018 | 466782.43 | 36091.39 | No | | |
| 14 | 12/14/2018 | 1/13/2019 | 482894.13 | 37337.19 | No | | |

Uploading Data for Multiple Meters at One or More Properties

Follow these steps to add multiple meters and/or bills for one or more existing properties:

1. Along the left-hand side of the **MyPortfolio** tab, click **Upload and/or update multiple properties.**
2. In the **Edit and Manage Information** section, click **Create an Upload Template**
3. Select the task you are performing (“Add Meters to Existing Properties” or “Add Bills to Existing Meters”) and the properties you want to include in the template. Click **Create & Download Template.**

Create a Custom Upload Template

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

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

Properties:

Warning - Don't Change Columns!

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

Creating New Properties?

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

Create & Download Template [Cancel](#)

4. Save the spreadsheet file that loads in your browser, and then open it to enter required information, such as dates and energy consumption amounts. When you are finished entering information, save the spreadsheet to your computer. **NOTE:** Do not change any formatting in the spreadsheet, including column headers, as this will cause an error in the upload process.
5. When you're ready to upload the spreadsheet, go back to the **Upload and/or update multiple properties** page. In the **Upload Spreadsheets** section, select the appropriate option from the **Type of Upload** drop-down menu. Browse for the spreadsheet you saved on your computer, click **Open**, and then click **Upload**. Portfolio Manager then automatically adds the data to your portfolio.

Are you required to report energy data for a city or state ordinance?

If so, you may also find the training they provide on Portfolio Manager and their specific reporting requirements helpful.

Please see this list of websites and contact information for cities/states with reporting ordinances:

<https://portfoliomanager.zendesk.com/hc/en-us/articles/219737127-Contacts-for-state-local-compliance-ordinances>

Learn More!

To learn more about Portfolio Manager, visit www.energystar.gov/portfoliomanager.

To get answers to your questions, visit www.energystar.gov/buildingshelp.