



HOW TO BENCHMARK YOUR BUILDING

Instructions for Using ENERGY STAR® Portfolio Manager®
and NB Power's Web Services

Version 1, July 2021

OVERVIEW

This document is a quick start guide for entering your property into Portfolio Manager® and enrolling in NB Power's Web Services.

For additional help, we suggest you refer to:

- Natural Resources Canada benchmarking webpage <http://www.nrcan.gc.ca/energy/efficiency/buildings/energy-benchmarking/3691> or email your question to info.services@nrcan-rncan.gc.ca
- US Environmental Protection Agency Energy Star Portfolio Manager webpage <https://www.energystar.gov/buildings/facility-owners-and-managers/existing-buildings/use-portfolio-manager> and online helpdesk at <https://portfoliomanager.zendesk.com/hc/en-us>

For technical questions related to NB Power's Web Services, email your Portfolio Manager property ID and Meter ID plus your NB Power Account number, last bill dates and bill amount as well as a description of your issue to NB Power's Portfolio Manager Web Services / services Web Portfolio Manager d'Énergie NB - PMWS-SWPM@nbpower.com

ENERGY STAR® Portfolio Manager®, an online service created by the Environmental Protection Agency (EPA), allows you to track the energy consumption of your facilities and compare them to similar buildings nationwide. Web Services makes it easier to use this tool by uploading meter data automatically to your Portfolio Manager® account.

This guide will walk you through the process of benchmarking your building:

- how to register for a Portfolio Manager® account'
- create a profile for your property; and,
- enroll in NB Power's Web Services.

The troubleshooting section can help you identify and correct problems you may encounter with NB Power's Web Services. You will also find detailed answers for many frequently asked questions at the end of the document.

Before getting started, you may want to collect information about your building using the Data Collection Worksheet available on EPA's ENERGY STAR® Portfolio Manager® Benchmarking website:

<https://portfoliomanager.energystar.gov/pm/dataCollectionWorksheet>

SECTION 1

How to Register a Portfolio Manager® Account

1-1 Go to the [ENERGY STAR® Portfolio Manager® Login page](http://www.energystar.gov/portfoliomanager) (www.energystar.gov/portfoliomanager) and click *Register Now*. If you already have a Username and Password, enter it below.

The screenshot shows the ENERGY STAR Portfolio Manager website. At the top, there is a navigation bar with links for 'ABOUT', 'FOR PARTNERS', and a search box. Below this is a secondary navigation bar with categories: 'Find Products', 'Save at Home', 'New Homes', 'Commercial Buildings' (which is underlined), and 'Industrial Plants'. A breadcrumb trail reads 'Home » Commercial Buildings » Portfolio Manager'. On the left is a vertical sidebar menu with items like 'Portfolio Manager', 'How Portfolio Manager helps you save', 'The benchmarking starter kit', 'Identify your property type', 'Enter data into Portfolio Manager', 'The data quality checker', 'How Portfolio Manager calculates metrics', 'Interpret your results', 'Verify and document your savings', 'Share and request data', 'Updates to ENERGY STAR® metrics with new market data', 'COVID-19 program changes', 'Get help accessing your utility data', and 'Scorecard'. The main content area features a large banner for 'ENERGY STAR® Portfolio Manager®' with the tagline 'The most-used energy measurement and tracking tool for commercial buildings.' Below this is a section titled 'Use Portfolio Manager' with text explaining the tool's purpose. Further down is a 'Benchmark any type of building' section. At the bottom of the main content area, there are two screenshots of the software interface. On the right side of the page, there is a 'Get help' section with a link to technical support. Below that is a login/register form with fields for 'username' and 'password', a 'Register now' button (highlighted with a red box), and a 'LOGIN' button. Links for 'Forgot password?' and 'Forgot username?' are also present.

1-2 Fill out the required information (fields marked with a red asterisk) and click *Create My Account*, which appears at the bottom of the screen, after the security questions used to recover your account.

Create an Account

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

1 Accessing Your Account

Username:

Password:

Confirm Password:

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.)

2 Selecting a Username

You cannot change your username, so choose wisely. For organizations with multiple properties, we recommend you create a "Corporate" account which "owns" all of the properties and have an administrator share properties with employees' individual accounts as necessary.

3 First & Last Name for Organizations

If you are creating a corporate account, you can enter your organization's name in the first and last name fields in order to make it easier for other Portfolio Manager users to find your organization. Example: First Name: Company ABC, Last Name: West Services Division

4 Primary Business or Service

If you have more than one "primary business," just pick the best option. Portfolio Manager will determine your category for a score based on the information. We require footage that you enter for each of your property uses.

5 Connecting with Others in Portfolio Manager

You can connect with other people in Portfolio Manager to easily share information. Your account must be searchable in order for others to send you a connection request.

About Yourself

First Name:

Last Name:

Job Title:

Email:

Confirm Email:

Phone:

Country:

Language:

Reporting Units: Conventional CFS Units (e.g., kWh/yr) Metric Units (e.g., GJ/yr)

Street Address:

City/Municipality:

State/Province:

Postal Code:

About Your Organization

Organization Name:

Primary Business or Service of Your Organization:

Is your organization an ENERGY STAR Partner? Yes No

Do you want your Account Name (and username) to be searchable by other Portfolio Manager users?

Do you want your username to be searchable by other Portfolio Manager users? You must select "Yes" if you want to connect with other users to allow automatic upload of utility data or to share properties.

Yes No

Confirm Your Identity

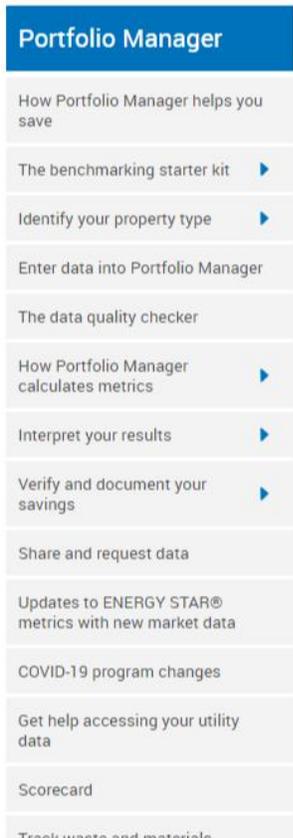
Please confirm that you are a human



Create My Account [Cancel](#)

Note: Portfolio Manager's default is to enable others to search for your account to facilitate connecting with others. Do not change this Searchability in Portfolio Manager default setting if you intend to enroll in NB Power's Web Service.

1-3 On the [Portfolio Manager log in page \(www.energystar.gov/portfoliomanager\)](http://www.energystar.gov/portfoliomanager), enter your Username and Password and click Log In. You will be brought to the My Portfolio tab. The My Portfolio tab displays a summary of the properties in your portfolio.





COVID-19 Program Impacts: EPA has made several changes to the certification rules. See this FAQ for the latest updates.

Use Portfolio Manager

You've heard it before: you can't manage what you don't measure. That's why EPA created ENERGY STAR Portfolio Manager®, an online tool you can use to measure and track energy and water consumption, as well as greenhouse gas emissions. Use it to benchmark the performance of one building or a whole portfolio of buildings, all in a secure online environment.

Benchmark any type of building

You can use Portfolio Manager to manage the energy and water use of any building. All you need are your energy bills and some basic information about your building to get started.

Are you designing a new commercial building? You can also use Portfolio Manager to set your energy use target and see how your estimated design energy stacks up against similar existing buildings nationwide.





Get help

Looking for Portfolio Manager technical support? Visit our [help center](#).

ENERGY STAR® Portfolio Manager®

EPA's online energy management and tracking tool enables you to measure and track the energy and water performance of any building over time.

[Register now](#)

Log in

username

password

[Forgot password?](#)

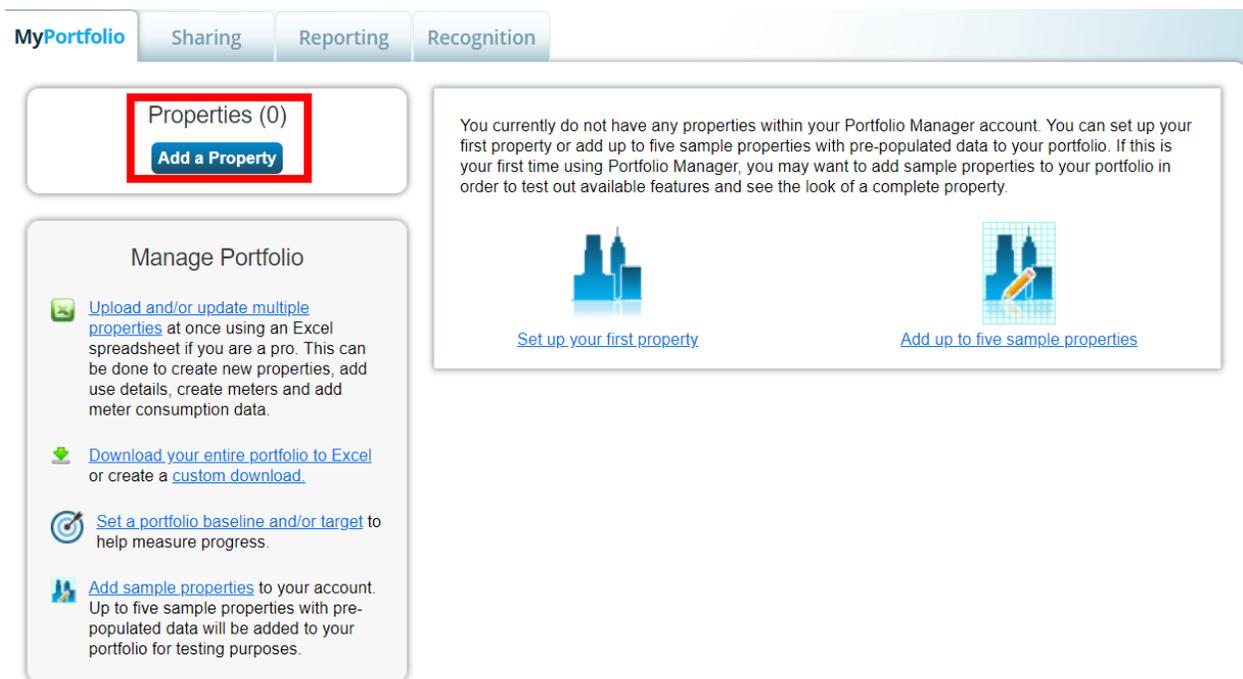
[Forgot username?](#)

SECTION 2

How to Create a Property Profile

To benchmark your facility in Portfolio Manager®, you will need to create a profile that has basic information about the property, how it is used, and the energy meters serving it.

2-1 Add a property by clicking *Add a Property* on the My Portfolio tab. You can also upload multiple properties by clicking the hyperlink at the bottom of the screen.



Tip: *If more than one person in your organization could be creating properties it is better to have one person “own” them and have that person share them with others who are working with the specific properties. See Issue# 3 in Section 6.*

2-2 Enter your property's primary function, number of buildings, and construction status. Then click *Get Started!*

Set up a Property: Let's Get Started!

Properties come in all shapes and sizes, from a leased space in a large office building, to a K-12 school with a pool, to a large medical complex with lots of buildings. Since there are so many choices, Portfolio Manager can walk you through getting your property up and running. When you're done, you'll be ready to start monitoring your energy usage and pursue recognition!



Your Property Type

We'll get into the details later. For now, overall, what main purpose does your property serve?

Select a property type

[Learn more about Property Types.](#)



Your Property's Buildings

How many physical buildings do you consider part of your property?

None: My property is part of a building (e.g., a Tenant Space)

One: My property is a single building

More than One: My property includes multiple buildings ([Campus Guidance](#))

How many?



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 purposes such as training.

Tip

To set up a property, you'll need information such as [gross floor area](#) and [operating hours](#).

Tip

Not sure what kind of property you are? Because we focus on whole building benchmarking, you want to select the property type that best reflects the activity in the majority of your building. Don't worry if you have other tenants with different business types, just select the main activity.

Test Properties

You may want to enter a property into Portfolio Manager that isn't actually a "real" property, either to familiarize yourself with features or maybe to train other people. By telling us this a "Test" property, we can give the option of including this property in your portfolio-level metrics, charts and table or not, depending what your needs are. This can be configured on your [Account Settings](#).

Get Started! [Cancel](#)

2-3 Enter the property's name, address, and other general information and click *Continue*.

Set Up a Property: Basic Property Information

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

About Your Property

Name:

Country:

Street Address:

City/Municipality:

County:

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.](#)

Irrigated Area:

Occupancy: %

Property Photo (optional): No file chosen
Select an image file on your computer with the format type of .jpg, .jpeg, .png or .gif; photos will be resized to fit a space of 2.78 inches wide x 2 inches tall.

Tip
The name you choose for your property does not have to be unique. But, it may make it easier for you to work with properties in your portfolio if you do not use the same (or similar) names.

Tip
The property photo that you upload here can be used on the [Registry of ENERGY STAR Qualified Buildings](#) if you submit the photo with your application for ENERGY STAR certification. Once a photo has been approved with an application, it cannot be changed until the next time that the property receives ENERGY STAR certification.

Standard IDs

Standard IDs are typically used in data collection, including by most state and local governments with benchmarking laws. If your property is covered by a benchmarking law, you probably need to fill this in. See [this FAQ](#) if you need help finding your Standard ID.

Standard ID(s): ID:
[+ Add Another](#)

Do any of these apply?

My property's energy consumption includes [parking areas](#)

My property has a [Data Center](#) that requires a constant power load of 75 kW or more

My property has one or more retail stores ([that are eligible for a Retail score](#))

My property has one or more restaurants/cafeterias

[Back](#)

[Continue](#) [Cancel](#)

Tip
Answering these simple questions will help us provide you with a better experience.

Tip: Make sure the city name is accurate and spelled correctly—mistakes may cause an error in connecting with NB Power's Web Services.

2-4 Enter the specific information on how your building is used. The fields required will depend on the selection made in Section 2.2 for the building's Primary Function.

For example, if you indicated your building's Primary Function is *Office*, you would be asked to supply the Gross Floor Area, Weekly Operating Hours, Number of Computers, Number of Workers on Main Shift, Percent that can be Heated, and Percent that can be Cooled. If you indicated that your building had a *Data Center* or *Parking*, additional fields pertaining to these uses would also be required.

Some space attributes, like "Gross Floor Area", are always required. Others may give you the option to "Use Default Value" (which inserts the national average for that attribute) or "Temporary Value" (which is your estimated value for that attribute) until you can collect and enter actual data for your facility. You can also rename the primary property use by clicking *Edit Name* next to Office Use, at the top of the next page in this example.

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

Name:	NBP Demonstration	Country:	CA
Property Type:	Office	Address:	
Year Built:	2000	515 King Street PO Box 2000, Station A Fredericton, NB E3B 4X1	Map It
Property consists of:	1 building		Edit

Add Another Type of Use [Add](#)

Building Use [Edit Name](#)

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

Gross Floor Area (GFA) should include all space within the building(s) including 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	3,000 <input type="text"/> Sq. Ft. <input type="button" value="v"/>	1/1/2000 <input type="button" value="v"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2000 <input type="button" value="v"/>	<input type="checkbox"/>
★ Number of Workers on Main Shift	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2000 <input type="button" value="v"/>	<input type="checkbox"/>
Number of Computers	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2000 <input type="button" value="v"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2000 <input type="button" value="v"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	<input type="text"/> <input type="checkbox"/> Use a default	1/1/2000 <input type="button" value="v"/>	<input type="checkbox"/>

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

[Back](#)

[Add Property](#) [Cancel](#)

Tip: To get detailed descriptions of each space and its space attributes, click the Help link at the top right corner of the screen, select Search the Knowledge Base, then Property Types on the left-hand side menu This will give you the definitions of each space type and attribute, default values, and answers to Frequently Asked Questions

ADDING ANOTHER TYPE OF USE

Portfolio Manager uses the term “Type of Use” to characterize the various spaces within a building. Your building may have one or more property use types. For example, an office building might have occupied office space, a computer data center, and parking. Each of these should be entered as a separate “Type of Use” and will require different information. If more than 10% of a building’s gross floor area is vacant, the vacant square footage should be described as a distinct space

type. Links to more information on how these space types are defined can be found in the Portfolio Manager Online Help section.

2-5 To add another space to your facility, click *Add Another Type of Use* and select the type of space you would like to add. Complete the required fields just as you did in Section 2-4.

The screenshot shows the Portfolio Manager interface for a property named 'NBP Demonstration'. The 'Details' tab is active, and the 'Property Uses and Use Details' section is highlighted with a red box. This section includes a 'View as Diagram' link, a dropdown menu set to 'Add Another Type of Use', and an 'Add' button. Below this is a table with the following data:

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	279 m ²	I want to...
Property GFA (Buildings):		279 (used to calculate EUJ)	
Property GFA (Parking):		0	

Other visible information includes:

- Address: 515 King Street PO Box 2000, Station A, Fredericton, NB E3B 4X1
- Year Built: 2000
- Weather Normalized Source EUI (GJ/m³): Current: N/A, Baseline: N/A
- Basic Information: Construction Status (Test property that is one single building), Property GFA - Self-Reported: 279 Sq. M., Occupancy: 100%
- Unique Identifiers (IDs): Portfolio Manager ID: 14800775
- Property Type: Office

2-6 Continue with the procedure described in *Section 2-5* until your building's gross floor area is completely entered. Make sure the sum of all spaces is equal to the total gross floor area of the facility. To finalize your entries, click *Save Use*.

Add Property Use For NBP Demonstration

Medical Office refers to buildings used to provide diagnosis and treatment for medical, dental, or psychiatric outpatient care.

Gross Floor Area should include all space within the building(s) including offices, exam rooms, laboratories, lobbies, atriums, conference rooms and auditoriums, employee break rooms and kitchens, rest rooms, elevator shafts, stairways, mechanical rooms, and storage areas. If you have restaurants, retail (pharmacy), or services (dry cleaners) within the Medical Office, you should most likely include this square footage and energy in the Medical Office Property Use. There are 4 exceptions to this rule when you should create a separate Property Use:

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

[More on this rule.](#)

Name: *

Property Use Detail	Value	Current As Of	Temporary Value
★ Gross Floor Area	* <input type="text" value="1,000"/> Sq. Ft. ▼	<input type="text" value="1/1/2000"/>	<input type="checkbox"/>
★ Weekly Operating Hours	<input type="text" value="65"/> <input checked="" type="checkbox"/> Use a default	<input type="text" value="1/1/2000"/>	<input type="checkbox"/>
★ Number of Computers	<input type="text" value="5"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2000"/>	<input type="checkbox"/>
Number of Workers on Main Shift	<input type="text" value="5"/> <input type="checkbox"/> Use a default	<input type="text" value="1/1/2000"/>	<input type="checkbox"/>
Surgery Center Floor Area	<input type="text"/> Sq. Ft. ▼	<input type="text" value="1/1/2000"/>	<input type="checkbox"/>
Number of Surgical Operating Beds	<input type="text"/>	<input type="text" value="1/1/2000"/>	<input type="checkbox"/>
Number of MRI Machines	<input type="text"/>	<input type="text" value="1/1/2000"/>	<input type="checkbox"/>
★ Percent That Can Be Heated	All of it - 100% ▼ <input type="checkbox"/> Use a default	<input type="text" value="1/1/2000"/>	<input type="checkbox"/>
★ Percent That Can Be Cooled	All of it - 100% ▼ <input type="checkbox"/> Use a default	<input type="text" value="1/1/2000"/>	<input type="checkbox"/>

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

Save Use [Cancel](#)

2-7 After saving your entries, you will see a green bar at the top of the Summary tab, confirming you have successfully created your Property. The next section will provide the steps to set up your building's energy meters.

MyPortfolio | [Sharing](#) | [Reporting](#) | [Recognition](#)

Congratulations! You have successfully added Medical Office Use to your property.

[Change Metric](#)

NBP Demonstration



515 King Street PO Box 2000, Station A, Fredericton, NB
E3B 4X1 | [Map It](#)

Portfolio Manager Property ID:

Year Built: 2000

[Edit](#)

 Not currently eligible for ENERGY STAR Certification

Weather Normalized Source EUI (GJ/m²) Why not score?

Current: N/A

Baseline: N/A

Summary | **Details** | Energy | Water | Waste & Materials | Goals | Design

Basic Information

Construction Status:
Test property that is one single building

Property GFA - Self-Reported:
279 Sq. M.

Occupancy:
100%

[Edit](#)

Property Uses and Use Details

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

Name	Property Use Type	Gross Floor Area	Action
▶ Building Use	Office	279 m ²	I want to... <input type="text"/>
▶ Medical Office Use	Medical Office	93 m ²	I want to... <input type="text"/>
		Property GFA (Buildings): 372 (used to calculate EUI)	
		Property GFA (Parking): 0	

📌 To add multiple uses and buildings to this property, you can use this [spreadsheet template](#) to upload your information.

Unique Identifiers (IDs)

Portfolio Manager ID:
14800775

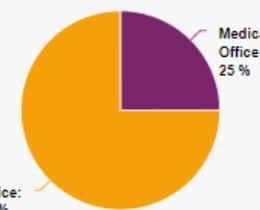
Custom IDs: None

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 GFA by Use



Property Type

Property Type - Self-Selected:
[Office](#) [Edit](#)

Property Type -Portfolio Manager-Calculated:
[Office](#)

📌 The Portfolio Manager-Calculated Property Type is used for your metrics (except for Mixed Use properties). [Learn more about property types.](#)

SETTING UP ENERGY METERS

You will need to add an Energy Meter to your property profile for each meter serving the building. For NB Power meters that you are signing up for Web Services, add one meter for each NB Power Account Number.

2-8 To add a meter, you can either click the “add energy use information” link in the green bar, or click on the Energy tab. Either choice will take you to the Energy tab.

The screenshot displays the 'MyPortfolio' interface for a property named 'NBP Demonstration'. At the top, there are navigation tabs for 'Sharing', 'Reporting', and 'Recognition'. A green notification bar states: 'Congratulations! You have successfully added Medical Office Use to your property.'

The main content area shows property details for '515 King Street PO Box 2000, Station A, Fredericton, NB E3B 4X1'. It includes a 'Map It' link, a 'Portfolio Manager Property ID' field, and a 'Year Built: 2000' field. A blue 'Edit' link is present. A grey box indicates the property is 'Not currently eligible for ENERGY STAR Certification'. A blue box shows 'Weather Normalized Source EUI (GJ/m²)' with 'Current: N/A' and 'Baseline: N/A'. A 'Change Metrics' link is also visible.

The 'Energy' tab is highlighted with a red box. Below the tabs, the 'Energy' section is active, showing a 'Meter Summary' box with the text: '0 Energy Meters Total. In order to receive metrics for your property, you must provide meters. You have not entered any meters yet.' It includes an 'Add A Meter' link and a 'Current Energy Date Not Available' field with an 'Enter Your Bills' button.

To the right, a 'Meters - Used to Compute Metrics (0)' section has a 'View as a Diagram' link and an 'Add A Meter' button. A large warning box contains the following text: 'There are currently no energy meters entered for this property/building. In order to track energy usage and receive energy metrics, you must provide an energy meter. Enter information about your energy meters to begin tracking energy usage. After entering the meter, you will need to choose to include it in your metrics. For a step-by-step guide to entering meter data, see How to get Utility Data into Portfolio Manager. Your utility, , may be able to send energy data directly to this building record, using Portfolio Manager web services. Click here for additional information and to see if this option is right for you. If this is what you would like to do, you can connect with to get the process started.'

At the bottom left, a section titled 'Five Ways to Enter Bill Data' lists the following methods:

1. Manual (Instructions here)
2. Use our simple spreadsheet (on the bottom of each meter's Manage Bills page) to upload or Copy/Paste
3. Use our complex spreadsheet (multiple meters + multiple properties)
4. Hire an organization to electronically enter your data
5. See if your utility offers this service

2-9 Once you are on the Energy tab, click *Add A Meter*.

The screenshot shows the 'MyPortfolio' interface with tabs for 'Sharing', 'Reporting', and 'Recognition'. A green notification bar at the top reads: 'Congratulations! You have successfully added Medical Office Use to your property.' Below this, the 'NBP Demonstration' property is shown with address '515 King Street PO Box 2000, Station A, Fredericton, NB E3B 4X1' and 'Year Built: 2000'. A 'Weather Normalized Source EUI (GJ/m²)' widget shows 'Current: N/A' and 'Baseline: N/A'. The 'Energy' tab is selected, and the 'Meters - Used to Compute Metrics (0)' section has a red box around the 'Add A Meter' button.

2-10 Indicate the sources of your property's energy. As you select different fuels, additional fields will appear. After you have filled out the required information about the meter(s), click *Get Started*.

Note: You may also track your property's water usage, but it is not required to benchmark your property, and site water consumption will not factor into your benchmark score.

Get Started Setting Up Meters for NBP Demonstration

There are five ways to enter meter data. First, you can enter manually, starting below. Second, you can set up your meters below, then upload a specially formatted spreadsheet with just your bill data. Third, for advanced users, you can use our upload tool that allows you to set up all of your meters and enter bill data. Fourth, you can [hire a company to update your data electronically](#). And finally, you can see if your [utility offers the service to update your energy data automatically](#).

The screenshot shows the 'Sources of Your Property's Energy' form with a list of energy sources and checkboxes. The 'Get Started!' button is highlighted in red. To the right, there are three informational sections: 'Tracking Energy', 'Two Meters Needed for Onsite Solar/Wind', and 'Automate Your Meter Entries'.

Sources of Your Property's Energy
What kind of energy do you want to track? Please select all that apply.

- Electric
- Natural Gas
- 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:

Tracking Energy
To track your energy, create an energy meter for each source of energy from a utility, a neighboring building, or an onsite solar or wind panel. If you purchase a raw fuel (e.g. gas) and produce your own fuel (e.g., electricity or chilled water), you only need a meter for the fuel you purchased (e.g. gas), and not for the fuel you produce.

Two Meters Needed for Onsite Solar/Wind
If you've got onsite Solar (or Wind), you still need to enter an Electric Grid Meter. [Learn More.](#)

Automate Your Meter Entries
There are many organizations that will electronically enter your utility data into Portfolio Manager. Many utilities provide this service for free. Service providers integrate this service into their own software and value-added offerings. [Learn more.](#)

Get Started! [Cancel](#)

2-11 Indicate the Units for each fuel type by double-clicking in the appropriate field and selecting the correct units in the drop-down menu that appears. Then, enter the date the meter was first billed for each meter, which is normally the date the building was built.

For NB Power meters you plan to connect via Web Services, you can name using any text. We recommend making the meter name something you can easily recognize later and add the NB Power account number to the meter name for reference (for example “Arbutus Office on Main 000099999”), then click *Create Meters*.

Note: For NB Power meters, the units selected for electricity use should be kWh. If you have a collective bill, you can use the Collective Bill Number as opposed to the NB Power meter number, and you will use the NB Power Account Number for the billing data in the following step (see screen shots).

About Your Meters for NBP Demonstration

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 name.

1 Energy Meter for NBP Demonstration (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?
<input type="checkbox"/>	Electric Grid Met	Electric - Grid		kWh (thousa		<input checked="" type="checkbox"/>		<input type="checkbox"/>

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

Back

Create Meters

Cancel

2-12 To add monthly meter entries manually, select *Click to add an entry*. You will then need to enter the billing Start Date, End Date, and Usage for each month. If you have a consolidated (collective billing) account, you will have entered the Consolidated Account Number for each meter entry, and now use the individual Meter Account Number for the billing Start Date, End Date, and Usage for each meter entry.

Note: Adding cost data is optional. Instead of adding data manually, you can upload an Excel spreadsheet to add multiple meter entries at once using the link at the bottom of the screen. However, if you intend to use NB Power's Web Services to upload your meter's historical data and usage automatically going forward, simply click Continue.

Your meters have been created! If you have your energy consumption information for these meters, you can enter it below. Or, you can [continue with setting up your meters](#) and enter your energy bills later.

Your Meter Entries for NBP Demonstration

Now we need actual energy consumption information in order to start providing you with your metrics and, possibly, your score!

1 Energy Meter(s) for NBP Demonstration

▼ Electric Grid Meter

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)
Click to add an entry								

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

Upload data in bulk for this meter:

Use this [single-meter spreadsheet](#) to:

- Upload the completed file below
- Copy and Paste the data into the table above

No file chosen

[Cancel](#)

2-13 Indicate which meters should be used to calculate your building's energy metrics and whether or not the selected meters account for the building's entire energy consumption.

Note: *This important step is also often referred to as "configuring your meters". After you have made your selections, click Apply Selections.*

Your meter entries have been added to your meters!

Select Meters to Include in Metrics

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

Summary

1

Meters representing the **total** energy consumption for [NBP Demonstration](#) (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 metrics. (Hint: Most meters should be included unless they are [sub-meters](#).)

	Name Meter ID	Type
<input checked="" type="checkbox"/>	Electric Grid Meter <input type="text"/>	Electric - Grid

Total of 1 meter(s). Tell us what this represents:

- These meter(s) account for the total energy consumption for [NBP Demonstration](#) (a single building).
- These meter(s) do not account for the total energy consumption for [NBP Demonstration](#) (a single building).

Apply Selections [Cancel](#)

2-14 The Summary tab will show a green banner at the top, confirming you have successfully associated your meters with your Property.

MyPortfolio
Sharing
Reporting
Recognition

Congratulations! Any energy meters you selected have been successfully associated to your property(ies).

NBP Demonstration

515 King Street PO Box 2000, Station A, Fredericton, NB
E3B 4X1 | [Map It](#)

Portfolio Manager Property ID:

Year Built: 2000

[Edit](#)

Not currently eligible for ENERGY STAR Certification

Weather Normalized Source EUI (GJ/m²)

Current: [N/A](#)

Baseline: [N/A](#)

Summary
! Details
 Energy
Water
Waste & Materials
Goals
Design

Meter Summary

1 Energy Meters Total

1 - Used to Compute Metrics

[Add A Meter](#)

Current Energy Date
Not Available

[Enter Your Bills](#)

Meters - Used to Compute Metrics (1) [Add A Meter](#)

[Change Meter Selections](#)

[View as a Diagram](#)

Name Meter ID	Energy Type	Most Recent Bill Date	In Use? (Inactive Date)
Electric Grid Meter <input type="text"/>	Electric - Grid		Yes

[Download Annual Totals by Meter](#)

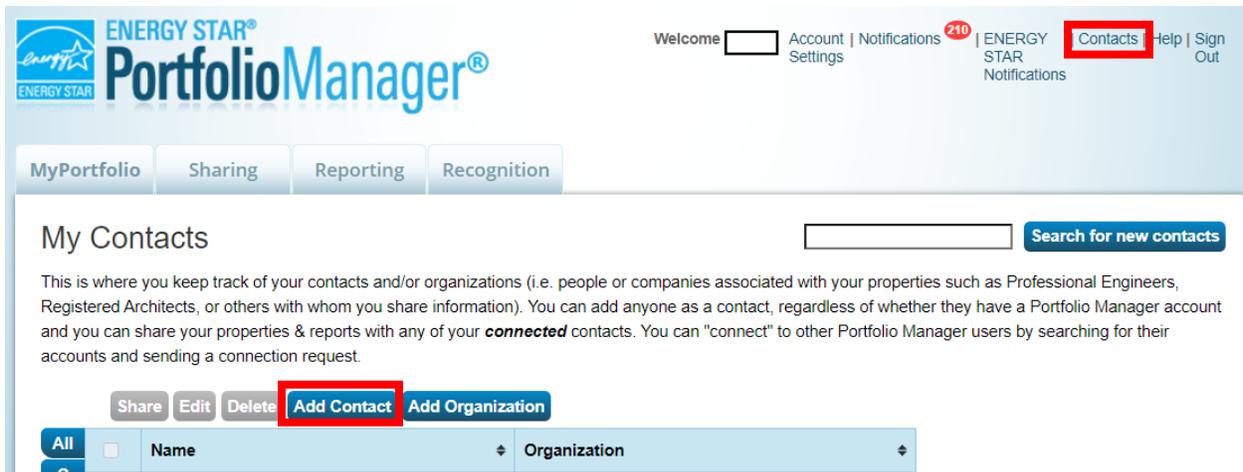
SECTION 3

How to Enroll in NB Power’s Web Services

Before enrolling in Énergie NB Power’s Web Services, make sure that:

- All of the meters accounting for the building’s total energy consumption have been added to the property profile.
- You have collected the validation details for each meter. You will need your billing account number and meter number or collective billing account number.
- The city name is spelled correctly in the address for each property.
- You have downloaded your existing meter consumption and cost data into a spreadsheet (for future reference and verification).

3-1 To set up Web Services, the first step is to connect with the username “Energie_NB_Power” (and not Énergie NB Power Web Services as Portfolio Manager® cannot record characters with accents for the username) as a contact. Click on the *Contacts* link at the top right-hand corner of the page.



3-2 This takes you to your My Contacts list. Click *Add Contact*.

Search Criteria: Name: Énergie NB Power **or**

Organization: Énergie NB Power **or**

Username: Energie_NB_Power **or**

Email Address: PMWS-SWPM@nbpower.com

3-3a Search for Energie_NB_Power by entering “Energie_NB_Power” as the username. Click *Search*.



Search Results

The results of your search are listed below. Clicking “Connect” will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

Search

Énergie NB Power Web Service
Services Web d'Énergie NB Power Web Services with Énergie NB Power

Connect

Page 1 of 1 | 50 | 1 - 1 of 1

Tip

Can't find what you are looking for? Try adjusting your search criteria.



Search Results

The results of your search are listed below. Clicking “Connect” will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria

Name:

Organization:

Username:

Email Address:

Search

Énergie NB Power Web Service
Services Web d'Énergie NB Power Web Services with Énergie NB Power

Connect

Page 1 of 1 | 50 | 1 - 1 of 1

Tip

Can't find what you are looking for? Try adjusting your search criteria.

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria Name: <input type="text"/> Organization: <input type="text"/> Username: <input type="text" value="Energie_NB_Power"/> Email Address: <input type="text"/> Search	Énergie NB Power Web Service Services Web d'Énergie NB Power Web Services with Énergie NB Power Connect Page 1 of 1 50 1 - 1 of 1
--	--

Tip

Can't find what you are looking for? Try adjusting your search criteria.

Search Results

The results of your search are listed below. Clicking "Connect" will send a request to the person asking them to confirm your request to add them as your contact. If they accept, you will see them listed as a connected contact in your address book. If they do not accept, or have not accepted yet, you will see them as an unconnected contact in your address book. Connecting with contacts will make it easier to share property information within Portfolio Manager.

Your Search Criteria Name: <input type="text"/> Organization: <input type="text"/> Username: <input type="text"/> Email Address: <input type="text" value="PMWS-SWPM@nbpower.com"/> Search	Énergie NB Power Web Service Services Web d'Énergie NB Power Web Services with Énergie NB Power Connect Page 1 of 1 50 1 - 1 of 1
---	--

Tip

Can't find what you are looking for? Try adjusting your search criteria.

3-3b After the page refreshes, "Énergie NB Power Web Services" will appear on the right-hand side of the page. Click *Connect*.

3-4 Next, carefully read all of NB Power's Terms and Conditions. Scroll down, read everything carefully, and agree to the Terms and Conditions. Finally, click *Send Connection Request*.

Send a Connection Request to [Énergie NB Power Web Service](#) to Begin Exchanging Data

[Énergie NB Power Web Service](#) requires the following information in order to exchange data with your property(ies). If you have any questions about how to complete this information, please contact [Énergie NB Power Web Service](#). Once your connection request has been accepted, you can share individual properties and/or meters with them to get started exchanging data.

Terms of Use:

La version française suivra

Terms and Conditions for Using NB Power's Web Services to access NRCan's Portfolio Manager®

For the purposes of these Terms and Conditions "Customer" or "you" means the person or organization who is legally responsible for the New Brunswick Power Corporation ("NB Power") electricity service account.

Natural Resources Canada (NRCan), in conjunction with the U.S. Environmental Protection Agency (EPA) have developed a national building energy performance benchmarking tool known as Portfolio Manager®, a tool of the ENERGY STAR® program.

Customer acknowledges that NRCan and EPA require information about

Agreement:

I agree to my provider's ([Énergie NB Power Web Service](#)) Terms of Use.

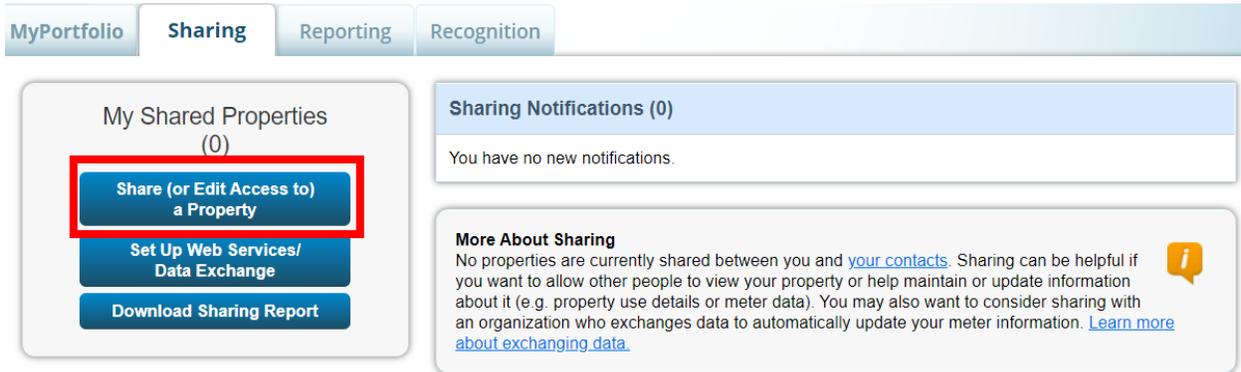
Send Connection Request [Cancel](#)

3-5 The top of the next page will show a green bar, confirming your connection request was sent to Énergie NB Power. Note: You are not yet connected to Énergie NB Power until your request is accepted. You will receive a notification in Portfolio Manager when Énergie NB Power accepts your request. This process takes up to 24 hours.

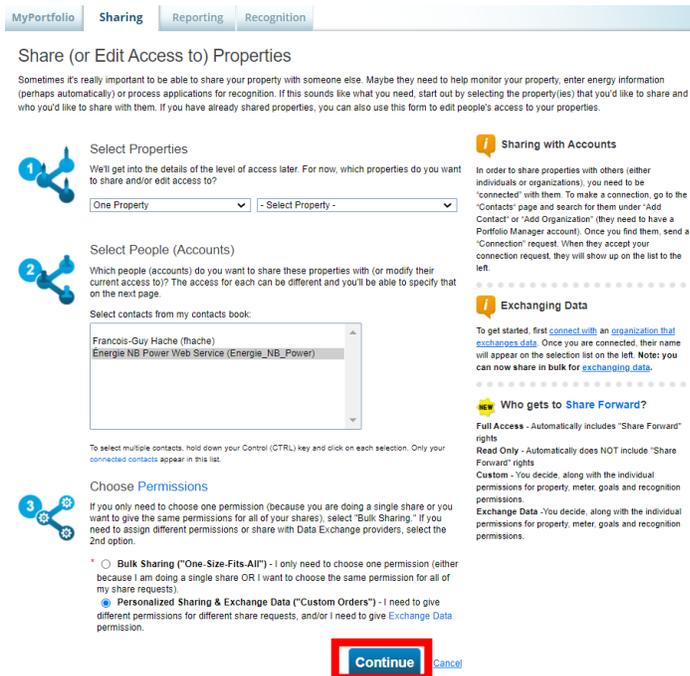


3-6 After you have received notification that Énergie NB Power has accepted your connection request, the next step is to share your property or properties with Énergie NB Power through your Portfolio Manager account. Go to the Sharing tab.

3-7 Click Share (or Edit Access to) a property as shown on this screen.



3-8 Next, make your choices under Select Properties to Share. Use the drop-down windows to choose the number of building(s), or group of buildings you would like to share with Énergie NB Power, and then indicate which specific buildings. Next, under Select People (Accounts) to Share With, highlight Énergie NB Power as the Account with which you would like to share. Lastly, under Permissions, select the setting for Exchange Data. Click *Continue*.



3-9a On the next screen, select the *Exchange Data* radio button and click *Edit* as the permission level to grant Énergie NB Power. When you do, a pop-up box opens, as seen in the next screen shot.

MyPortfolio | **Sharing** | Reporting | Recognition

Share Your Property(ies)

To finish up, tell us what type of access the people you have selected should have for each of the properties that you have selected. The option to exchange data is only available for authorized accounts.

4 **Select Permissions for Each Contact**

The access levels you select do not have to be the same for each property or each person.

Sort by: Property Name ▾

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ NBP Demonstration <input type="text"/>	<input type="radio"/>				
Énergie NB Power Web Service	<input type="radio"/>				

NEW Who gets to **Share Forward**?

Full Access - Automatically includes "Share Forward" rights

Read Only - Automatically does NOT include "Share Forward" rights

Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Exchange Data - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Share Property(ies) [Cancel](#)

3-9b For Property Information select FULL Access

Note: *This window is longer than it appears here. To see all fields, you must scroll down.*

Select Access Permissions to [NBP Demonstration](#) for [Énergie NB Power Web Service](#).
 The following information is required by [Énergie NB Power Web Service](#) in order to provide service to your property(ies). If you have any questions about how to complete this information, please contact them directly.

Select the permission level below that you would like to grant [Énergie NB Power Web Service](#) for each category.

Item	None	Read Only Access	Full Access	NB Power Account Number / Numéro de compte d'Énergie NB ¹	NB Power Meter or Recent Bill Number / Numéro de compteur ou de facture récente d'Énergie NB ²	Master Account Number from Collective Bill / Numéro de compte principal de la facture collective ³
Property Information	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			
▼ All Meter Information						
▼ Energy Meters						
Electric Grid Meter	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Goals, Improvements,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>			

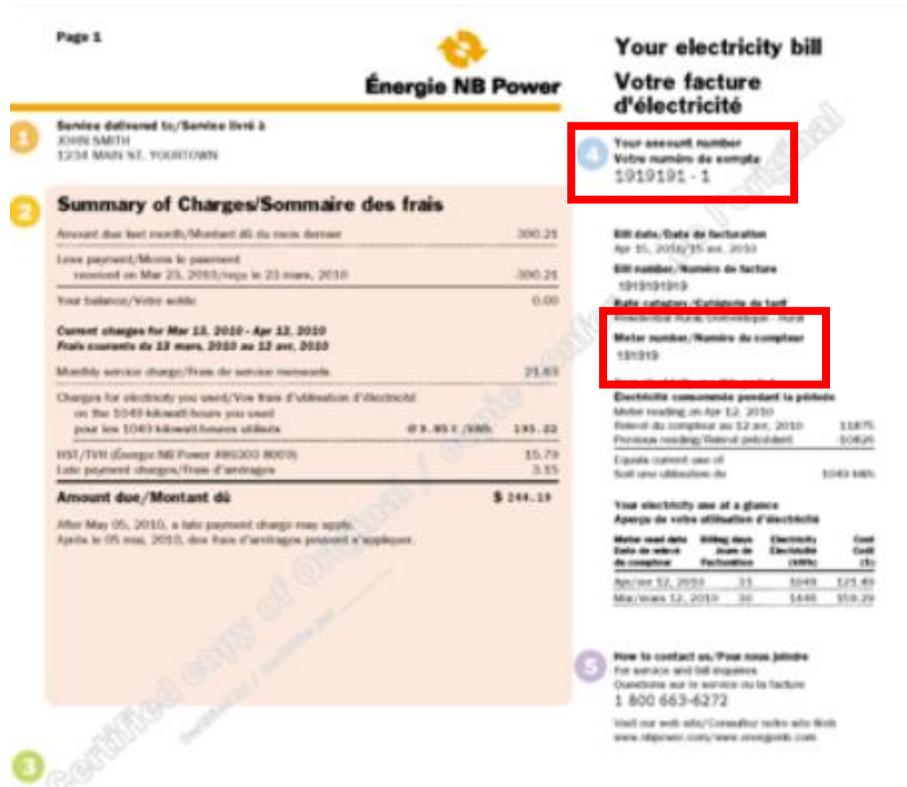
¹ NB Power Account Number / Numéro de compte d'Énergie NB: Example: 9999999; NB Power Account number from your bill / Numéro de compte d'Énergie NB qui paraît sur votre facture

Share Property(ies) [Cancel](#)

3-9c Select your Electric Meters Access to 'Full Access" (meters with read only access will be declined by [Énergie NB Power Web Service](#)).

Then fill in the required validation fields.

Note: You will need the NB Power Account Number and NB Power Meter Number or the Master Account Number for a Collective Bill.



Select *Full Access* for each electric meter you would like to connect with Énergie NB Power. Choose Read Only for Goals, Improvements, & Checklists, as well as NONE for Recognition.

NOTE: If your organization receives a consolidated (collective) bill from NB Power you can use Collective Billing Account Number ("Master account number"), for connection to [Énergie NB Power Web Service](#) updating.

1. On-line bill example

Home / Accounts & Billing / Account Summary / View Bill

VIEW BILL

Account Number

Service Address

Premise Phone Number

Other Names Associated With This Account

INFORMATION

[Bill Inserts](#)

[Back Of Bill Message](#)

[Key Conditions Of Service](#)

To view a PDF version of your bill you will need the most recent version of [Acrobat Reader](#).

Billing

Current Balance Last Payment Amount 2021-04-14
Last Payment Date

Select a bill date:

2021-03-16 - 2021-04-14

Bill Amount Bill Due Date Meter associated with this account
Read on 2021-04-14

After a late payment charge may apply

\$ PAY BILL **DOWNLOAD PDF** **✓ BILL INSERTS**

Summary of Charges for Rate Category

Bill Details

Amount Due Last Month	
Less Payments	
Received	
Received	
Balance	

Note: Any adjustments for past bills will be applied to the current balance

Current Charges for 2021-03-16 - 2021-04-14 (30 billing days)

The usual breakdown of charges will appear on your next monthly bill.

Service Charge

Paperless billing is a free service that allows you to view your bills online, instead of receiving paper bills in the mail.

- [Sign up for paperless billing.](#)

2. Paper bill example

Page 1


Énergie NB Power

1 Service delivered to/Service livré à
JOHN SMITH
1234 MAIN ST, YOURTOWN

2 Summary of Charges/Sommaire des frais

Amount due last month/Montant dû du mois dernier	300.21
Less payment/Moins le paiement received on Mar 23, 2010/reçu le 23 mars, 2010	-300.21
Your balance/Votre solde	0.00
Current charges for Mar 13, 2010 - Apr 12, 2010 Frais courants du 13 mars, 2010 au 12 avr. 2010	
Monthly service charge/Frais de service mensuels	21.63
Charges for electricity you used/Vos frais d'utilisation d'électricité on the 1043 kilowatt-hours you used pour les 1043 kilowatt-heures utilisés @ 9.85¢/kWh	193.22
HST/TVH (Énergie NB Power #86300) 800%	15.79
Late payment charges/Frais d'arriérés	3.55
Amount due/Montant dû	\$ 244.19

After May 05, 2010, a late payment charge may apply.
Après le 05 mai, 2010, des frais d'arriérés peuvent s'appliquer.

Your electricity bill
Votre facture d'électricité

4 Your account number
Votre numéro de compte
1019191 - 1

Bill date/Date de facturation
Apr 15, 2010/15 avr. 2010

Bill number/Numéro de facture
101919191

Rate category/Catégorie de tarif
Residential (Rate)/Domestique - Tarif

Meter number/Numéro du compteur
101919

Your electricity use this period
Électricité consommée pendant la période

Meter reading on Apr 12, 2010
Règlement du compteur au 12 avr. 2010 11875

Previous reading/Règlement précédent 10826

Equals current use of
Soit une utilisation de 1043 kWh

Your electricity use at a glance
Aperçu de votre utilisation d'électricité

Meter read date Date de règlement du compteur	Billing days Jours de Facturation	Electricity Électricité (kWh)	Cost Coût (\$)
Apr/mar 12, 2010	31	1043	123.49
Mar/mars 12, 2010	30	1406	150.29

5 How to contact us/Pour nous joindre
For service and bill inquiries
Questions sur le service ou la facture
1 800 663-6272

Visit our web site/Consultez notre site Web
www.nbpower.com/www.enrgie.nb.com

Énergie NB Power

Payment return slip/Talon de paiement

000019191911 0000014043 0020100505 0000014043 000019191911 5

6 Please tear off the slip and return it with your payment.
Veuillez détacher et retourner ce talon avec votre paiement.

JOHN SMITH
1234 MAIN ST
YOUR TOWN NB E3A 9B9

Your account number/Votre numéro de compte
1019191 - 1

Amount due/Montant dû **\$ 244.19**

After May 05, 2010 a late payment charge may apply.
Après le 05 mai, 2010, des frais d'arriérés peuvent s'appliquer.

Amount of your payment
Montant de votre paiement

Certified copy of Original / copie conforme de l'original

1:03 204 81 9001: 96 Certified by / certifiée par _____

3-9d Set the Share Forward permission level to NO, then in the bottom right hand corner, click on the blue box reading *Apply Selections & Authorize Exchange*. The pop-up window will now close.

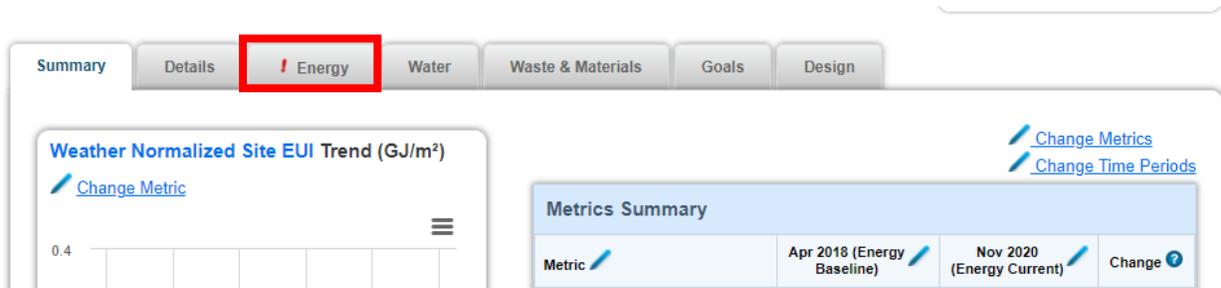
3-10 A green banner will appear at the top of the Sharing tab confirming the request submission.

Note: *Your request should be processed within 1-2 business days. Each shared meter will receive up to 36 months of historical data (depending on when the account was opened) plus monthly updates going forward.*

3-11 Review Uploaded Data and Erase any Duplicates

For meters that have been successfully shared, Énergie NB Power will populate up to 36 months of energy data for that meter. Review uploaded data for accuracy and erase duplicates of previous consumption entries you have made.

3-11a Go to the screen showing summary data for the property. If there are issues in the consumption data, there will be an exclamation mark on the Energy tab. Click on that tab, then on the electric meter.



3-11b The displayed consumption entries will have highlighted error messages at the top and in between consumption records.

Manage Bills (Meter Entries) for

 Electric Grid Meter overlap of 30 days between 01/26/2021 and 02/24/2021. Please confirm this is correct or remove the overlap by adjusting the dates per your meter entries and saving your changes. For more help, see [this FAQ](#).

Meter Selection: ▼

▶ **Basic Meter Information** (****click on the arrow to the left to expand this section*)

▼ **Monthly Entries**

3-11c Scroll down to the duplicate entries and select the ones you don't want.

Basic Meter Information (***click on the arrow to the left to expand this section)

Monthly Entries

Display Year(s):

	Start Date	End Date	Usage kWh (thousand Watt-hours)	Total Cost (\$)	Estimation	Green Power	Demand (kW)	Demand Cost (\$)	Last Update
<input type="checkbox"/>	9/24/2020	10/27/2020	1,415	223.02	<input type="checkbox"/>	<input type="checkbox"/>			11/18/2020
<input type="checkbox"/>	10/28/2020	11/25/2020	1,408	209.97	<input type="checkbox"/>	<input type="checkbox"/>			1/1/2021
<input type="checkbox"/>	11/26/2020	12/28/2020	3,199	437.42	<input type="checkbox"/>	<input type="checkbox"/>			1/1/2021
<input type="checkbox"/>	12/29/2020	1/25/2021	3,098	424.57	<input type="checkbox"/>	<input type="checkbox"/>	0	0	2/1/2021 Energie NB Power Web Service
<input type="checkbox"/>	1/26/2021	2/24/2021	3,466	471.54	<input type="checkbox"/>	<input type="checkbox"/>	0	0	3/1/2021 Energie NB Power Web Service

⚠ Electric Grid Meter [] an overlap of 30 days between 01/26/2021 and 02/24/2021. Please confirm this is correct or remove the overlap by adjusting the dates per your meter entries and saving your changes. For more help, see [this FAQ](#).

<input type="checkbox"/>	1/26/2021	2/24/2021	3,466	471.54	<input type="checkbox"/>	<input type="checkbox"/>	0	0	3/4/2021
--------------------------	-----------	-----------	-------	--------	--------------------------	--------------------------	---	---	----------

Delete Selected Entries
 Add Another Entry
 Learn how to copy/paste
 Delete All Entries

3-11d Scroll to the bottom of the page and click Delete Selected Entries.

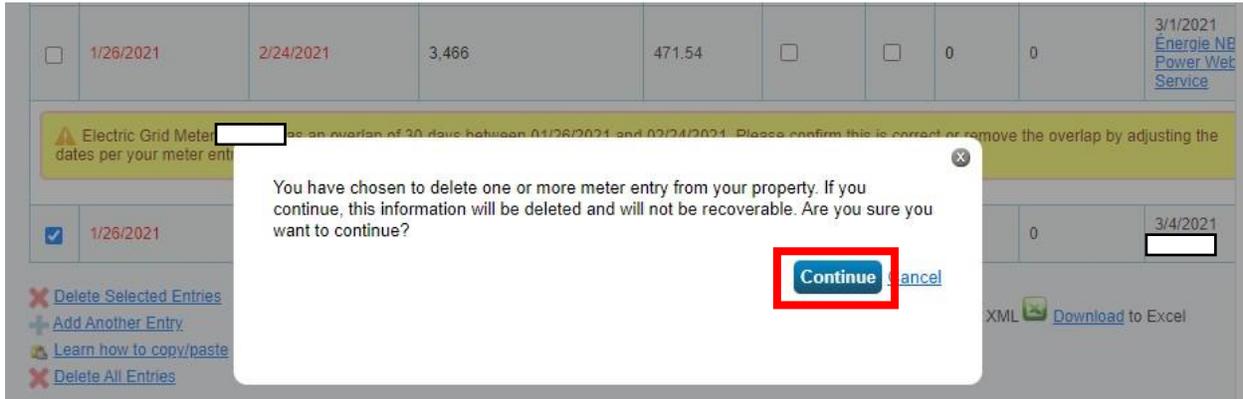
<input type="checkbox"/>	12/29/2020	1/25/2021	3,098	424.57	<input type="checkbox"/>	<input type="checkbox"/>	0	0
<input type="checkbox"/>	1/26/2021	2/24/2021	3,466	471.54	<input type="checkbox"/>	<input type="checkbox"/>	0	0

⚠ Electric Grid Meter [] as an overlap of 30 days between 01/26/2021 and 02/24/2021. Please confirm this is correct or remove the overlap by adjusting the dates per your meter entries and saving your changes. For more help, see [this FAQ](#).

<input checked="" type="checkbox"/>	<input type="text" value="01/26/2021"/>	<input type="text" value="02/24/2021"/>	<input type="text" value="3,466"/>	<input type="text" value="471.54"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
-------------------------------------	---	---	------------------------------------	-------------------------------------	--------------------------	--------------------------	--------------------------------	--------------------------------

Delete Selected Entries
 Add Another Entry

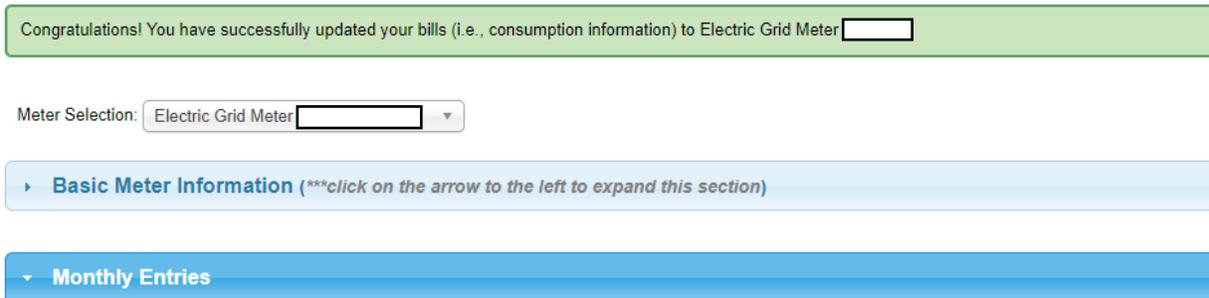
3-11e A confirmation box will pop up, click *Continue*.



3-11f Click on *Save Bills* to save your changes.



3-11g A green banner will appear confirming your updates. The warnings for the corrected records should disappear.



3-12 Rejected Sharing Requests

If your meter sharing request is rejected (but the property sharing is accepted), follow the procedure in *Section 3-9a* to re-submit the meter sharing. If you made a mistake and did not set up the property correctly (e.g. wrong account number on the property) you will need to unshare the property (and meter if it was accepted) using the procedure in *Section 5-5*. Note that you must allow one business day for the unshare to be processed before re-submitting the share request.

SECTION 4

Key Features of Énergie NB Power Web Services

PAST METER ENERGY CONSUMPTION DATA:

- For meters that have been successfully shared and validated, Énergie NB Power will populate up to 36 months of energy data for that meter (depending on when the account was opened) plus monthly updates (if billed) going forward.

EXISTING METER ENERGY CONSUMPTION DATA:

- Énergie NB Power's Web Services will not erase or overwrite existing meter entries for dates during the previous 36 months. You will need to remove the duplicate records manually.

MONTHLY UPDATES:

- For meters that have been successfully shared and validated, Énergie NB Power will update the meter with new entries once a month, (if there is a bill for that month). If there is no bill, no updates will be made. Future monthly updates will also not erase or overwrite past data.

UNMETERED CONSUMPTION NOT SENT:

- Note that unmetered consumption is not sent. If your account consists only of unmetered energy use, the sharing request will be rejected.

DO NOT LINK ONE NB POWER ACCOUNT TO MORE THAN ONE PROPERTY:

- It is possible to link the same NB Power account to more than one property via two separate meters. The system will not reject the second meter sharing request but only one of the meters will be updated with consumption on an ongoing basis.

PROPERTY CHANGES OWNERS:

If property ownership has changed, but NB Power's account numbers remained the same, monthly updates will continue. However, if the account number has changed, Énergie NB Power will automatically stop sending monthly consumption updates and the new property owner will have to enter a new meter sharing request with the new NB Power account number.

If you need historical consumption data, the new owner must request the previous owner to transfer the Portfolio Manager account number to the new owner's name. The information can only be accessed from Portfolio Manager, not from NB Power

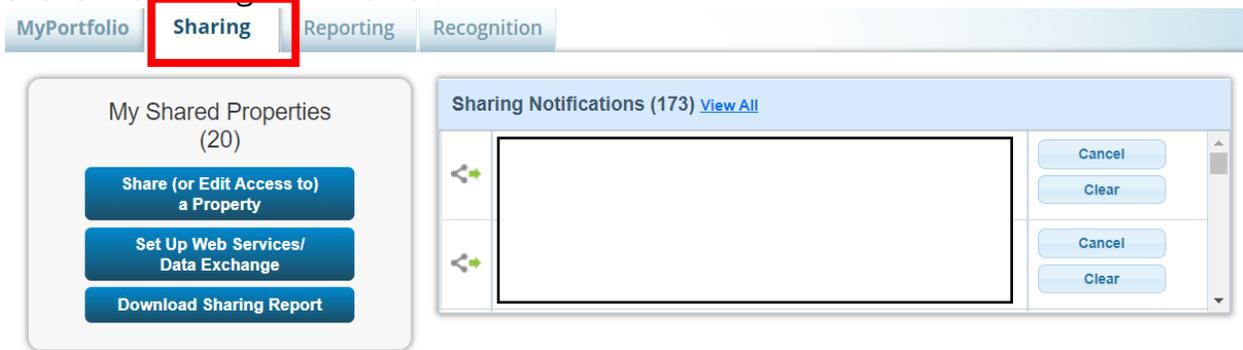
BUILDINGS ON NET METERING

If your account is on net metering, the net consumption will be updated to Portfolio Manager. No special setup is required.

SECTION 5

Changing Web Services Authorizations: Share Additional Properties and Meters, Share a New Meter, Remove Permissions, or Re-setting an Existing Meter Share

5-1 Once you are connected with Énergie NB Power, you can share additional properties with NB Power in a few easy steps. On the Sharing tab, under the Action column, select *Share Property with Others* next to the property name you wish to share with Énergie NB Power.



Overview of Shared Properties [Learn more about Sharing Properties](#)

Name	My Permissions	Property Data Administrator	Can I Share With Others?	# of People With Access	Action
				12	I want to...
				12	I want to...
				14	I want to...
				5	I want to...
				5	I want to...

5-2 Next, follow the step-by-step instructions beginning in *Section 3-9* to connect the additional property and its meters with Énergie NB Power's Web Services. Finish making your additions, then click *Apply Selections & Authorize Exchange*. The pop-up window will close. Then, click *Share Property(ies)* to finalize your new share.

AUTHORIZING ADDITIONAL METERS

5-3a If you added a new electric meter to a property in Portfolio Manager which is already set up for Web Services data exchange with Énergie NB Power, and this meter is a separate account, using these directions, you can share this additional meter with Énergie NB Power. From the Sharing tab, under the Action drop-down menu to the right of Énergie NB Power, select *Edit Contact's Permissions*.

5-3b When the page refreshes, you will see the screen called Edit Sharing Permissions. First (1), click on the blue *Edit* link highlighted below; a pop-up window will open. Follow the step-by-step instructions in *Section 3-9* to authorize a data exchange for your new meter, then click *Apply Selections & Authorize Exchange*. The pop-up window will now close. Second (2), finalize your changes by clicking on *Edit Permissions* and/or *Save Changes*.

Edit Sharing Permissions

The table below lists your property (ies) and the type of access you have granted to each person. You may make any necessary edits and click "Edit Permissions".

NEW Who gets to Share Forward?

- Full Access** - Automatically includes "Share Forward" rights
- Read Only** - Automatically does NOT include "Share Forward" rights
- Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
- Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Sort by:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	
<p>! Contact is Property Data Administrator- This contact is the Property Data Administrator for this property and therefore you cannot edit their permissions. If you continue, these particular shares will not be sent.</p>					
	<input type="radio"/>				<input checked="" type="radio"/> Edit

[Save Changes](#) [Cancel](#)

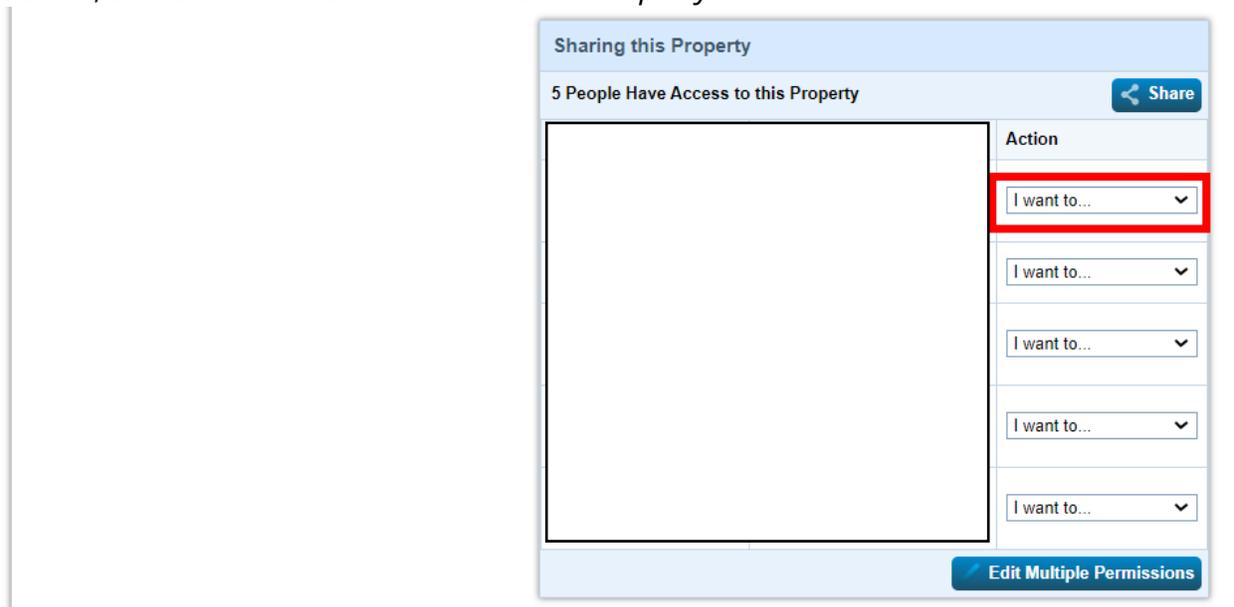
A green banner confirms that you have successfully sent your new sharing permissions to Énergie NB Power Web Services.

Note: It will take 1-2 business days (i.e., overnight) for Énergie NB Power to accept/reject your new sharing permissions.

REMOVING PERMISSIONS FOR SPECIFIC PROPERTIES AND/OR METERS

5-4 From the property profile Summary tab, under the Action drop-down menu for Énergie NB Power, you have several options, including *Edit Contact's Permissions* or *Remove Contact's Access to My Properties*.

5-4a To stop sharing your property and all associated meters with Énergie NB Power, select *Remove Contact's Access to Property*.



A pop-up window will confirm that you want to remove Énergie NB Power's access for this site. Click *Continue*.

A green banner will confirm that you have stopped sharing your building (and associated meters) with Énergie NB Power.

Note: No new meter data will be uploaded from NB Power for this site going forward. Existing meter data previously uploaded into Portfolio Manager from NB Power will not be removed, however.

5-4b To remove Énergie NB Power's access to individual meters, select *Edit Contact's Permissions*.

View Contact: Énergie NB Power Web Service (Connected)

[Disconnect](#)

Contact Information for Énergie NB Power

Username:	Energie_NB_Power (Connected)	Country:	CA
Job Title:	Services Web d'Énergie NB Power Web Services	Address:	515 King Street PO Box 2000, Station A Fredericton, NB E3B4X1
Organization:	Energie NB Power	Phone:	<input type="text"/>
Professional Licenses:		Email:	PMWS-SWPM@nbpower.com

Properties Énergie NB Power and I Both have Access to

Owned By (PDA): Shared By: In Group: [Search](#)

Name	Property Data Administrator	My Permissions	Énergie NB Power's Permissions	Action
				<input type="text" value="I want to..."/>
				<input type="text" value="I want to..."/>
				<input type="text" value="I want to..."/>
				<input type="text" value="I want to..."/>
				<input type="text" value="I want to..."/>

The next screen you will see is called Editing Sharing Permissions. Click on the word *Edit*.

Edit Sharing Permissions

The table below lists your property (ies) and the type of access you have granted to each person. You may make any necessary edits and click "Edit Permissions".

NEW Who gets to **Share Forward**?

Full Access - Automatically includes "Share Forward" rights

Read Only - Automatically does NOT include "Share Forward" rights

Custom - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Exchange Data -You decide, along with the individual permissions for property, meter, goals and recognition permissions.



Sort by:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
<input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Énergie NB Power Web Service	<input type="radio"/>				<input checked="" type="radio"/> Edit

Save Changes

[Cancel](#)



For electric meters you would like to remove from Énergie NB Power's access, change the permissions level from FULL to NONE. Then scroll down and click *Apply Selections & Authorize Exchange* button. This pop-up window will then close.

Select Access Permissions to [Bathurst Engineering \(NBP\)](#) for [Énergie NB Power Web Service](#).

Item	None	Read Only Access	Full Access	NB Power Account Number / Numéro de compte d'Énergie NB ¹	NB Power Meter or Recent Bill Number / Numéro de compteur ou de facture récente d'Énergie NB ²	Master Account Number from Collective Bill / Numéro de compte principal de la facture collective ³
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>			
▼ All Meter Information						
▼ Energy Meters						
Electric Grid Meter	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Goals

¹ NB Power Account Number / Numéro de compte d'Énergie NB: Example: 9999999; NB Power Account number from your bill / Numéro de compte d'Énergie NB qui paraît sur votre facture; Between 6 and 12 Characters

² NB Power Meter or Recent Bill Number / Numéro de compteur ou de facture récente d'Énergie NB: Example: 999999; NB Power Meter number or Bill Number from a recent bill. Leave blank if you intend to enter a collective account number in the next column / Numéro de compteur d'Énergie NB ou Numéro de facture qui paraît sur une facture récente. Laissez en blanc si vous avez l'intention de saisir un numéro de facture collective dans la colonne suivante; Between 1 and 10 Characters

³ Master Account Number from Collective Bill / Numéro de compte principal de la facture collective: Example: 99999999; Account number from your collective bill's

Be sure to finish up by clicking on the *Edit Permissions* or *Save Changes* button to finalize the change.

MyPortfolio | **Sharing** | Reporting | Recognition

Edit Sharing Permissions

The table below lists your property (ies) and the type of access you have granted to each person. You may make any necessary edits and click "Edit Permissions".

NEW Who gets to Share Forward?

- Full Access** - Automatically includes "Share Forward" rights
- Read Only** - Automatically does NOT include "Share Forward" rights
- Custom** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.
- Exchange Data** - You decide, along with the individual permissions for property, meter, goals and recognition permissions.

Sort by:

Name (ID)	No Access	Read Only Access	Full Access	Custom Access	Exchange Data
▼ <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		
Énergie NB Power Web Service	<input type="radio"/>				<input checked="" type="radio"/> Edit

Save Changes [Cancel](#)

A green banner confirms that you have successfully edited your meter sharing permissions.

Note: *For unshared properties and meters: If you have stopped sharing your individual meter or entire property with Énergie NB Power, going forward NB Power will no longer provide any use data, but any existing meter entries will not be removed from Portfolio Manager. Additionally, your contact Connection with Énergie NB Power will still be preserved.*

RE-SETTING AN EXISTING METER SHARE

5-5 If you have an existing meter share with Énergie NB Power that is no longer uploading data, or if you made a mistake when setting up a meter share (e.g., the property has multiple accounts and the wrong one was associated with the meter), use the following steps to fix your existing meter share.

Note: *Do NOT use the “Edit My Contact’s Permissions” option to adjust an existing meter share because Énergie NB Power will not “see” your edits, even though your changes will appear to have taken effect in Portfolio Manager. To Re-Set an existing meter share to fix an issue, there are three steps required: (1) un-share the property and its meters with NB Power, then wait 1 business day for this to be enabled. (2) make your edits (for example change your meter name to the 6 digit meter number). (3) then set up a brand new share of the property and its meters with Énergie NB Power using the correct information.*

5-5a - Step 1 Stop sharing your property and all associated meters with Énergie NB Power by selecting *Remove Contact’s Access to Property* from the Summary tab of Portfolio Manager.

View Contact: Énergie NB Power Web Service (Connected)

Disconnect

Contact Information for Énergie NB Power

Username: Energie_NB_Power (Connected) Country: CA
Job Title: Services Web d'Énergie NB Power Web Services Address: 515 King Street
PO Box 2000, Station A
Fredericton, NB E3B4X1
Organization: Énergie NB Power Phone:
Professional Licenses: Email: PMWS-SWPM@nbpower.com

Properties Énergie NB Power and I Both have Access to

Owned By (PDA): Shared By: In Group:

Name	Property Data Administrator	My Permissions	Énergie NB Power's Permissions	Action
				I want to... <input type="text"/>
				I want to... <input type="text"/>
				I want to... <input type="text"/>
				I want to... <input type="text"/>
				I want to... <input type="text"/>

A pop-up window will confirm that you want to remove Énergie NB Power's access for this site. Click *Continue*.

Properties Énergie NB Power and I Both have Access to

Owned By (PDA):

Name

Académie Assomption (DSF-t

You have chosen to remove [Énergie NB Power Web Service](#)'s access to (NBP). If you continue, this property will be removed from their account and in order for them to re-gain access you will have to re-share the property with them. Are you sure that you want to remove Énergie NB Power Web Service's access to ?

Action

I want to...

I want to...

I want to...

Remove Contact's Acces:

A green banner will confirm that you have stopped sharing your building (and associated meters) with Énergie NB Power. No new meter data will be uploaded from NB Power for this site going forward. Existing meter data previously uploaded into Portfolio Manager from NB Power will not be removed.

IMPORTANT NOTE: *due to system limitations, the unshare must be processed before proceeding to the next step. Please wait one business day for this to be processed. You will not receive a notification of the unshare being processed by Énergie NB Power.*

5-5c - Step 2 Set up a new share with Énergie NB Power for the property and its meter(s). Follow the steps outlined in *Sections 3-7 through 3-10* carefully, making sure to enter all details correctly, such as the NB Power account number, NB Power meter number, and / or master account number.

Note: *You may find when you get to the step in 3-9b where the pop-up window opens that the numbers you entered on your first attempt to share the property and its meter(s) are still there. If you do see your old data, be sure to fix any errors in the account number or other. If these fields are blank when the pop-up window opens, fill them out again carefully. Be sure to select the permissions levels exactly as described in Section 3-9b and 3-9c, and then save your selections as described in Sections 3-9d and 3-9e. You should see a data upload from NB Power within 1-2 business days. If you still do not see use data in your meter(s), or if you know you made a data entry error, repeat the un-share/re-share steps described here in Section 4-5, correcting any inaccuracies in data entry or permissions levels chosen.*

SECTION 6

Troubleshooting

Issue #1: I received a notification in Portfolio Manager that my meter sharing has been declined OR I entered a meter sharing request for my building in Énergie NB Power's Web Services and it's been more than one business day. However, my energy data still hasn't been uploaded to Portfolio Manager.

Solution #1: Omitting one or more of the steps below will cause Énergie NB Power's Web Services system to be unable to process your request to upload energy data. After carefully completing all these steps, you should see your energy use history uploaded within one (1) business day.

1. When submitting your connection request to Énergie NB Power, read the Terms and Conditions and checkmark the "I agree" box. Then press *Send Connection Request*.
2. When you initiate sharing the property(ies) of interest with Énergie NB Power, choose *Exchange Data* level of permissions.
3. In the pop-up window entitled "Select Data Exchange Access Permissions", fill out all fields marked with a red Asterisk. Be sure to choose Full Access on the Property itself, and Full Access for each Meter you are setting up in Web Services. Leave Permissions Levels for any gas meters set to None. Add the NB Power Account Number, NB Power Meter Number and/or Collective Billing Number, add Last Bill Date and Amount (with both dollars and cents), if requested. When everything is entered correctly, press *Apply Selections & Authorize Exchange*.
4. When the pop-up window closes, you must then click on *Share Property(ies)*.

If energy data is still not uploaded within one business day, you may be requesting data for a "closed" account. NB Power is unable to provide energy use history for closed accounts. If your meter sharing request has been declined again, email your Portfolio Manager property ID, Portfolio Manager meter ID, NB Power account number, and NB Power meter number to NB Power's Portfolio Manager Web Services / services Web Portfolio Manager d'Énergie NB - PMWS-SWPM@nbpower.com for investigation.

Issue #2: Énergie NB Power's Web Services uploaded my energy use history, but I still haven't received my benchmark score from Portfolio Manager.

Solution #2: There are many reasons why your facility may not have a rating. The best way to find out why is to click on the link that says "N/A" next to the facility name, where the score would otherwise appear. Reasons will be displayed. Also, evaluating your data by running the Data Quality Checker can identify issues with your record. This helpful tool is found on the Summary Tab of Portfolio Manager.

For additional assistance with Portfolio Manager and your benchmark score, visit the [Frequently Asked Questions page](http://energystar.supportportal.com/) (<http://energystar.supportportal.com/>), contact the EPA's [Help Desk](mailto:buildings@supportportal.com) (buildings@supportportal.com) or Natural Resources Canada [benchmarking webpage](http://www.nrcan.gc.ca/energy/efficiency/buildings/energy-benchmarking/3691) (<http://www.nrcan.gc.ca/energy/efficiency/buildings/energy-benchmarking/3691>).

Issue #3: Someone left my company. How can I get access to their buildings in Portfolio Manager?

Solution #3: The fastest solution is to directly contact your former colleague and ask that they transfer the properties to your account.

Note: You must be connected to Énergie NB Power Web Services BEFORE the transfer to leave the meter sharing intact. However, if you are unable to contact this individual and EPA can verify in the database that both accounts are registered under the same company, EPA can transfer the properties on behalf of the former owner. Send EPA a request through the EPA ["Ask A Question" form](#). Be sure to include both Portfolio Manager usernames and which properties you want transferred.

To avoid similar complications and/or delays in the future, EPA strongly recommends implementing one of the following procedures:

- Create a corporate account which "owns" all the properties and have an administrator share properties with employees' individual accounts as necessary. When an employee leaves your company, this main corporate account can "unshare" with them. It can then share with the account of the person taking over the position.
- Ensure that all properties are transferred to the appropriate new property data owner before an employee leaves your company.

Issue #4: There are duplicate consumption records in Portfolio Manager for the same billing period.

Solution #4: Two conditions can result in duplicate (or overlapping) consumption records:

1. There were records already in Portfolio Manager when the initial history was loaded by the system. Solution: delete whichever record you don't want from each billing period (see instructions in *section 3-11*).
2. There was a billing correction (rebate/rebill), resulting in a negative consumption record for the same period as positive consumption. Solution: normally you will see 3 records, a negative and a positive for the same amount, plus a 3rd positive entry. Delete the two that match.

Note: *Normally, if one billing period is estimated the following billing period will just be the net amount to offset the actual vs the estimate, so no duplicate record will be created. You do not need to make any changes in this case.*

Issue #5: In some years, your building may not show a weather-normalized source EUI.

Solution #5: Portfolio Manager includes metrics designed to 'normalize' conditions that can affect how much energy you need to operate your property in a given year. These effects are incorporated to help you better understand your energy performance. The metrics restrict billing periods to a maximum of 65 days. In rare cases, it is possible for the monthly billing period to exceed this. If this occurs, you will need to manually split the billing period into two records.

To resolve this issue:

1. Click on the meter.
2. Select *Display All Years* in the search box.
3. Manually adjust all billing periods longer than 65 days by adding another entry and splitting the consumption between the new record and the one that was there.
4. Click *Save Bills*

SECTION 7

Frequently Asked Questions (FAQs)

Does Énergie NB Power Web Services apply to customers of other electric utilities?

No, customers of Saint John Energy, Edmundston Energy, Perth Andover Light Commission and any other utilities are not eligible for Énergie NB Power Web Services. Customers of those utilities will have to manually enter or upload their electric consumption.

Who can I contact for assistance?

- **Natural Resources Canada**
[Benchmarking website](#)
[Email \(info.services@nrcan-rncan.gc.ca\)](mailto:info.services@nrcan-rncan.gc.ca)
- **US Environmental Protection Agency**
[Energy Star Portfolio Manager webpage](#)
[Online Helpdesk](#)

For technical questions related to **Énergie NB Power Web Services**, email your Portfolio Manager property ID and Portfolio Manager Meter ID plus your NB Power Account number and meter number and description of your issue to:

NB Power's [Portfolio Manager Web Services Inbox](mailto:PMWS-SWPM@nbpower.com) (PMWS-SWPM@nbpower.com)

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