

Getting started in Portfolio Manager

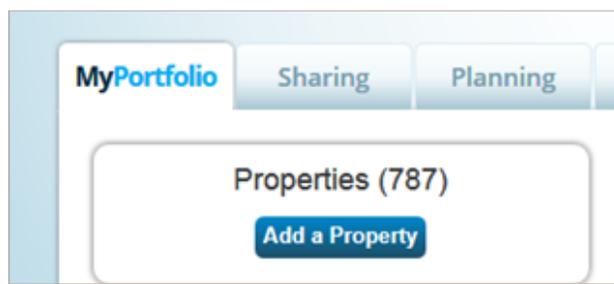
How to set up the auto-upload function for your energy consumption data

Creating an account

1. Navigate to “Create a New Account” in Portfolio Manager: <https://portfoliomanager.energystar.gov/pm/login.html>.
2. Select: Metric Reporting Units (GJ/m²).

Creating properties

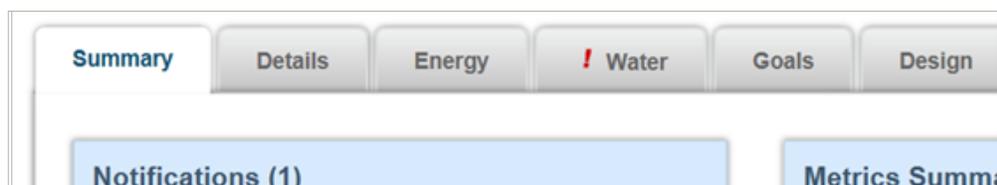
1. Click “Add a Property.”



2. Fill out all the forms until you reach the last page that says “Add a Property.”
3. Repeat this step for each property.

Adding meters

1. On the Property Summary page, click on the “Energy” tab.



2. Click on “Add A Meter.”



3. Fill out the forms until you reach the last page that says “Create Meters.”

Please note: It is encouraged that you change the default name of the meter to the actual meter number in order to avoid confusion later on when you are sharing your meters with Manitoba Hydro.

4. Once all property meter information is entered, create a “connection” with Manitoba Hydro Web Services.

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Connecting with Manitoba Hydro

Once the account is created, you will be redirected to the “My Portfolio” page.



1. Type “manitbahydroWS” into this search box:
2. with Manitoba Hydro Web Services.
3. You will need to wait a day or two until this “connection” is accepted by Manitoba Hydro.

Activate the Auto Upload function

Sharing properties with Manitoba Hydro

1. Click on the “Sharing” tab beside “My Portfolio.”
2. Click “Share (or Edit Access to) a Property.”
3. Select the properties you want to share with Manitoba Hydro for the upload.
4. Select Manitoba Hydro Web Services from the list of people/account you are connected to.
5. Give “Personalized Sharing & Exchange Data” permission and click continue.
6. Click the radio button under “Exchange Data” and a new window should pop up.
7. Enter meter number and account numbers and submit share (as shown below).

Item	None	Read Only Access	Full Access	Manitoba Hydro 14 Digit Account Number ¹	Manitoba Hydro Meter Number ²
Property Information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>		
▼ All Meter Information					
797390	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="72345678912345"/>	<input type="text" value="123456"/>
195946	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="text" value="72345678912345"/>	<input type="text" value="123456"/>

8. You will need to wait a day or two for the auto upload to be accepted by Manitoba Hydro.

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Troubleshooting

Your meter data may have gaps or overlaps



Portfolio Manager requires that all meters have continuous dates (and no overlap in billing). This error message will appear in a building's "Meters" tab when there is a gap or overlap in the bills entered for that meter.

To resolve this issue:

1. Click on the meter.
2. Click "Display All Years" in the search box.
3. Find the entries where the gap or overlap occurs (highlighted in red and shown in a yellow caution box at the top).
4. Manually adjust the start dates (or delete entries if needed) so that no overlap or gap remains.
5. Click "Save Bills."

After Manitoba Hydro completes the upload, initial natural gas and electricity consumption readings may be different

Your natural gas and electricity readings may have varying consumption start dates. In order for Portfolio Manager to evaluate the building, the start dates will need to be adjusted to match.

To resolve this issue:

1. It is recommended that you change the start date of your natural gas meter to the start date of the first electricity reading (or vice versa if the opposite is true).

In some years, your building may not show a weather-normalized source EUI

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. Some of Manitoba Hydro's monthly billing periods may exceed this.

To resolve this issue:

1. Click on each meter.
2. Select "Display All Years" in the search box.
3. Manually adjust all billing periods longer than 65 days.
4. Click "Save Bills."

Your meter share may be declined

If you make a mistake while sharing your property/meters, Portfolio Manager will notify you that your meter share has been declined. Portfolio Manager will give an explanation why the share was declined (either meter number or account number do not match).

To resolve this issue:

1. Check that you have the correct meter and account numbers.
2. Check that you entered the correct numbers when you shared the properties with Manitoba Hydro web services.
3. If you have found the error, re-share with the correct meter and account number.
If what you entered matches your records, inquire with Manitoba Hydro.

For more information contact us:

Email: portfoliomanager@hydro.mb.ca

Call: 204-360-3676 (Winnipeg) or 1-888-624-9376

Visit: hydro.mb.ca/your_business

Available in accessible formats upon request.