

## How to Respond to Data Requests in Portfolio Manager®

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

Portfolio Manager provides the ability for organizations wishing to collect data from a variety of individuals to develop and use a custom Data Request within Portfolio Manager. You may receive Data Requests from other users or organizations to provide property or portfolio data as part of a program or initiative. Each request includes a link that takes you to Portfolio Manager and provides instructions for completing the Data Request.

This process is often used in jurisdictions where there are voluntary benchmarking programs or mandatory energy use disclosure policies.

Responding to a Data Request is different than sharing a property with a contact, because when you respond to a Data Request, you release only the information specified in the data request template for the designated time period.

Follow the steps in this document to respond to a Data Request.

### **Process for Responding to Data Requests**

1. Access the request.
2. Prepare a response.
3. Preview the response.
4. Submit the response.

## **1** Access the Request

When another Portfolio Manager user sets up a data request, they will provide a link to access the request. The link may be provided via email or posted on a public website.

Click the link and then log in to Portfolio Manager as prompted. You will be directed to the **Respond to Data Request** page.

## 2 Prepare a Response

On the **Respond to Data Request** page, provide the requested information for each section.

In the **About Your Response** section, select the user whose data is being submitted.

- ✓ Select **myself** to submit the response on your own behalf.
- ✓ Select **someone else** to choose a contact with whom you are associated. Select the contact from the drop-down list or click **Add a Contact** to add a new contact.

About Your Response

Who is this data being submitted on behalf of?

myself

someone else

\* - Select a contact - [Add a Contact](#)

- Select a contact - Abrams, Zach

Account, Demo

In the **Your Response** section, select information to include in the response.

- ✓ **Timeframe:** Select a timeframe from the drop-down menu. If the requestor has specified a timeframe, you will not be able to change it. **NOTE:** Portfolio Manager generates annual metrics; the month you select is the last month of the 12-month reporting period. For example, selecting September 2013 will generate metrics of the period 10/1/2012 to 9/30/2012.
- ✓ **Properties:** Select the number of properties to include in the response. If you select **Multiple Properties**, you must specify which properties to include. Click **Select Properties** and then choose the properties from the list and click **Apply Selection**. If there are many properties in your account, you can quickly identify properties to include in your response by sorting them based on group name, primary function, location, or by using the filter function.

Your Response

Select Information to Include:

Timeframe: \* - Select Timeframe -

*i* If the data requestor has specified a timeframe for the request, you will not be able to change it.

Properties: \* Multiple Properties [Select Properties](#) Selected Properties: 0

*i* The data requestor may have asked for one or more standard IDs to be included with the property information. Make sure you have entered the requested standard IDs for each property before sending your response.

Select Properties

Name	Primary Function	State/Province
101 1M sf Office Building	Office	MA
120 Office Property	Office	MA
201 100k sf Office Building	Office	MA
201 1M sf Office Building	Office	MA
Biomass Facility	Energy/Power Station	DC
Elementary School	K-12 School	TN
K-12 School	K-12 School	CO
L2 Office	Office	DC
Medical Office	Medical Office	DC
MF Test	Multifamily Housing	CO
Office 2	Office	DC
Prison	Prison/Incarceration	CA
SLI	Other	MO
TEST School	K-12 School	TN
TEST Tower	Office	IL

Selected Properties: 0 ([View Selection](#))

Filter Properties (20)

Filter by Group ([Create New Group](#))

- Mid-Atlantic (6)
- Mid-West (1)
- Northeast (6)
- South (3)

Filter by Primary Function

- College/University (1)
- Drinking Water Treatment & Distribution (1)
- Energy/Power Station (1)

Filter by State/Province

- California (1)
- Colorado (2)
- District of Columbia (D.C.) (6)
- Illinois (1)

Filter by Shared from

- Sherrin Levin (7)

[Apply Selection](#) [Cancel](#)

Click **Generate Response Preview** after you have selected completed each section of the **Respond to Data Request** page.

### 3 Preview Response

After you generate the response preview, you can view it in on the **Reporting** tab. You will see a notification in the **Templates & Reports** section when your preview is available.

You can preview the response before sending it.

- ✓ Select **Preview Response** from the drop-down menu next to the report name to review the response in your browser window.
- ✓ Select **Download Preview in Excel** to review the information in Excel.

**NOTE:** If you want to select different properties or timeframes for your response, select **Edit Properties and Timeframe**. If you make these or other changes to property data, select **Generate an Updated Response** from the drop-down menu, and then complete the information on the **Respond to Data Request** page. If you select **Delete Response**, the response will not be released and will be removed from your account. You will need to go back to the Data Request link to access the request and begin a new response.



The screenshot shows a web interface titled "Templates & Reports (3)" with a "Create a New Template" button. A green notification bar states "Your new response preview(s) has been generated." Below this is a table with columns for Name, Date, and Action.

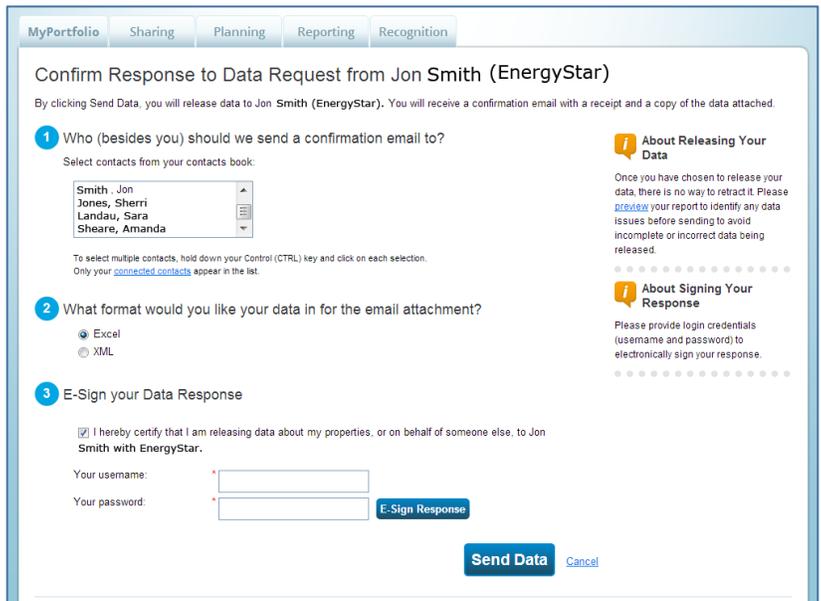
Name	Date	Action
Data Request: Test (Request from Jon Smith)	Response Preview Generated: 5/13/2013 5:43 PM	I want to... Download Edit Properties and Timeframe Preview Response Download Preview in Excel Generate an Updated Response Send Response Delete Response I want to...
Sample EPA Report #2	No Spreadsheet Generated	
Sample EPA Report #1	No Spreadsheet Generated	

### 4 Submit Response

After you have reviewed and confirmed the data in the report, select **Send Response** from the **Action** drop-down menu next to the report name.

Select options on the **Confirm Response to Data Request** page.

- ✓ Select who else you want to receive a confirmation email. To add a contact, click **Contacts** in the upper right-hand corner.
- ✓ Select the format of your data for the email attachment.
- ✓ E-Sign your response by entering your username and password. Then click **E-Sign Response**.



The screenshot shows a confirmation page titled "Confirm Response to Data Request from Jon Smith (EnergyStar)". It includes instructions and three numbered steps:

- Who (besides you) should we send a confirmation email to?** Select contacts from your contacts book. A list shows: Smith, Jon; Jones, Sherri; Landau, Sara; Sheare, Amanda.
- What format would you like your data in for the email attachment?** Radio buttons for Excel (selected) and XML.
- E-Sign your Data Response** with a checkbox for certification, username and password fields, and an "E-Sign Response" button.

Buttons for "Send Data" and "Cancel" are at the bottom.

Click **Send Data** to send your data and complete the response. You will receive a confirmation email with a receipt and a copy of the data submitted.

#### Learn More!

To learn more about Portfolio Manager, visit [www.energystar.gov/benchmark](http://www.energystar.gov/benchmark).  
To get answers to your questions, visit [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp).