

Generating Standard Reports and Performance Documents

The reporting feature in Portfolio Manager offers a variety of reports and graphics to help you view and share performance metrics. This document describes how to download two types of reports that are useful if you're trying to capture a snapshot of your building performance:

- “Performance Highlights” Report (for a portfolio-level, multi-year summary)
- Statement of Energy Performance (for a building-level, 12-month performance period)

How to Generate a “Performance Highlights” Report

The Performance Highlights report is one of eleven standard reports available in the Reporting tab:

- ✓ Performance Highlights
- ✓ Energy Performance
- ✓ Emissions Performance
- ✓ Water Performance
- ✓ Fuel Performance
- ✓ ENERGY STAR Certification Status
- ✓ Partner of the Year Report
- ✓ Sustainable Buildings Checklist Report
- ✓ Waste Performance
- ✓ Buildings Emissions Calculator Import
- ✓ Data Quality

Timeframe & Properties

You can select timeframes and properties to include in standard reports. You can also generate multiple reports with different dates or groups of properties to view changes in your portfolio in detail.

NOTE: While this guide uses the “Performance Highlights” report as an example, the steps described below can be used to generate any of the eleven “standard” reports listed above.

1 Select Report to Generate

Click the **Reporting** tab and then select **Generate New Report** from the **Action** drop-down menu next to “Performance Highlights.”




Templates & Reports (10)				Create a New Template
◆	Name	◆	Status	Action
	Sample template		Generated: 5/15/2018 1:11 PM	I want to... 
	Performance Highlights		No Report Generated	I want to... Generate New Report


Figure 1: Templates and Reports sample view

2

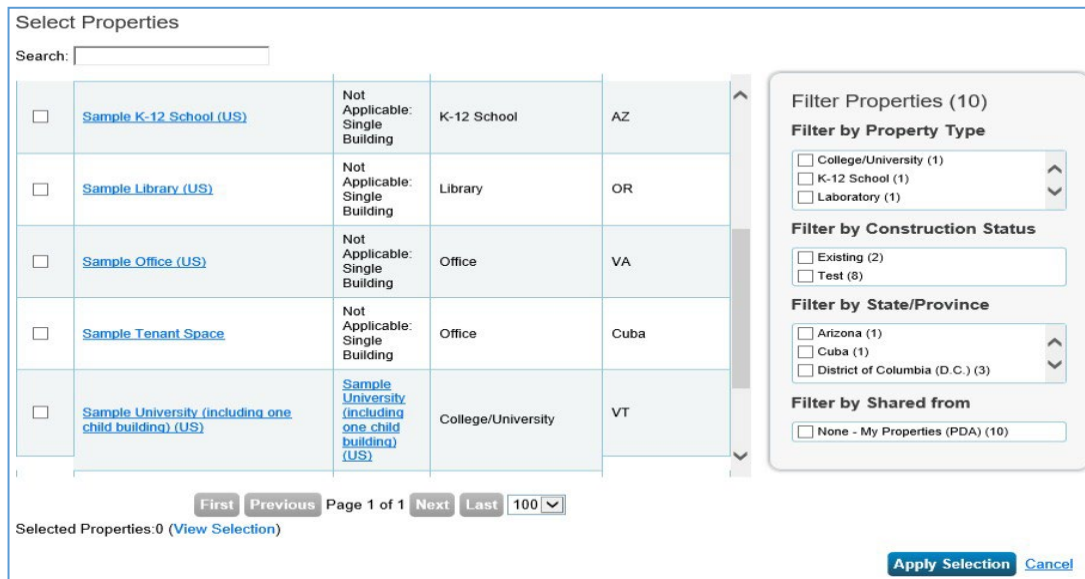
Define Report Content

1. **Timeframe:** Select the time period for which the report will calculate and return metrics.
 - ✓ From the drop-down menu, you can specify whether you want your report to be based on a single 12-month period (baseline year, current year, or another period of your choosing), or if you wish to compare two 12-month periods.
 - ✓ You can also choose for the tool to output monthly, quarterly, or yearly metrics between a specified start and end date.
 - ✓ If you select a timeframe that includes “Current Year” or “Baseline Year,” you will have the option to choose whether these periods are defined by energy, water, or waste data (since you can have different “Baseline” and “Current” dates for each resource type).

NOTE: Portfolio Manager generates annual metrics; the month you select is the last month of the 12-month reporting period. For example, selecting December 2022 will generate metrics for the period 1/1/2022 to 12/31/2022.

 Each property must have 12 full months of data for metrics to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report.

2. **Properties:** 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.



Select Properties

Search:

<input type="checkbox"/>	Sample K-12 School (US)	Not Applicable: Single Building	K-12 School	AZ
<input type="checkbox"/>	Sample Library (US)	Not Applicable: Single Building	Library	OR
<input type="checkbox"/>	Sample Office (US)	Not Applicable: Single Building	Office	VA
<input type="checkbox"/>	Sample Tenant Space	Not Applicable: Single Building	Office	Cuba
<input type="checkbox"/>	Sample University (including one child building) (US)	Sample University (including one child building) (US)	College/University	VT

Filter Properties (10)

Filter by Property Type

☐ College/University (1)

☐ K-12 School (1)

☐ Laboratory (1)

Filter by Construction Status

☐ Existing (2)

☐ Test (8)

Filter by State/Province

☐ Arizona (1)

☐ Cuba (1)

☐ District of Columbia (D.C.) (3)

Filter by Shared from

☐ None - My Properties (PDA) (10)

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

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

Figure 2: Sample Property Selection screenshot

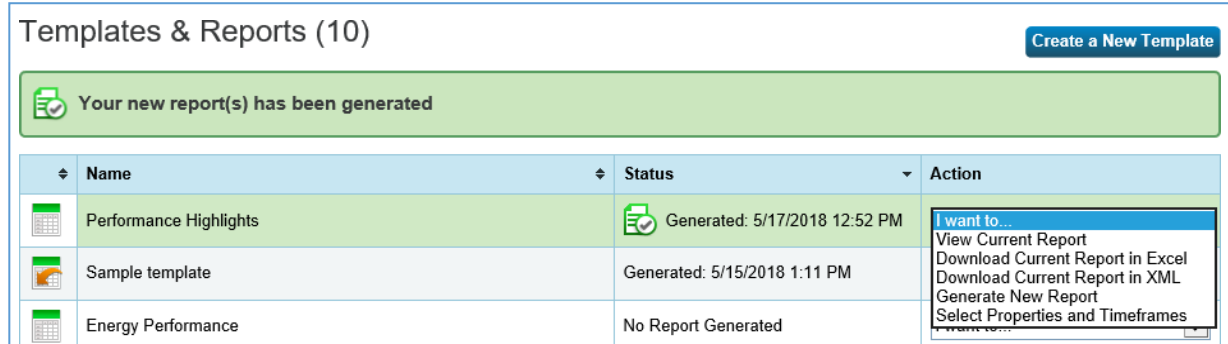
3. **Review Included Metrics:** The metrics in each pre-defined template were selected by EPA to help you understand key aspects of your performance. If you'd like to create your own report with different metrics than those already set up within Portfolio Manager, please see the [Portfolio Manager Custom Reporting Guide](#).

3 Generate Spreadsheet

Click on the **Generate Spreadsheet** button after you've completed each section of the page.

4 View or Download Report

After you generate the report, you'll see a notification in **Templates & Reports** section of the **Reporting** tab. Once the report has been generated, the **Status** column indicates "Generated," along with the date and time the report was produced.



The screenshot shows the 'Templates & Reports (10)' section. At the top right is a 'Create a New Template' button. Below it is a green notification bar that says 'Your new report(s) has been generated' with a checkmark icon. Below the notification is a table with four columns: Name, Status, and Action. The table contains three rows: 'Performance Highlights' (Status: Generated: 5/17/2018 12:52 PM), 'Sample template' (Status: Generated: 5/15/2018 1:11 PM), and 'Energy Performance' (Status: No Report Generated). The 'Action' column for the first row is expanded, showing a dropdown menu with options: 'View Current Report', 'Download Current Report in Excel', 'Download Current Report in XML', 'Generate New Report', and 'Select Properties and Timeframes'.

Name	Status	Action
Performance Highlights	Generated: 5/17/2018 12:52 PM	I want to... View Current Report Download Current Report in Excel Download Current Report in XML Generate New Report Select Properties and Timeframes
Sample template	Generated: 5/15/2018 1:11 PM	
Energy Performance	No Report Generated	

Figure 3: Templates and Reports sample view after report generation

From the **Action** drop-down menu next to the report, you can view the report directly in Portfolio Manager, download and save it as a different file type (XLS or XML), generate a new report, or update the report with new properties and/or timeframes, as seen in Figure 3.

How to Generate a Statement of Energy Performance

The Statement of Energy Performance (SEP) is a one-page report summarizing various aspects of a property's energy performance. Any property can generate an SEP for informational purposes. However, if a property is pursuing ENERGY STAR Certification, that process will entail the generation of an "official" SEP and data verification checklist, which must be stamped and signed by a Licensed Professional following a site visit. For more information, please see the guide [How to Apply for the ENERGY STAR](#).

1 Select Performance Document

In the upper right of the **reporting** tab, click on the link for Statement of Energy Performance (SEP) under the ENERGY STAR Performance Documents list.

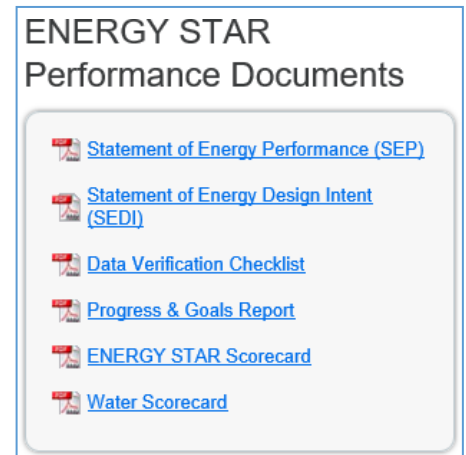



Figure 4: List of Performance Documents available via the Reporting tab

2 Define Report Content

- ✓ Select the property to include in the report.
- ✓ Select a timeframe for the report.
- ✓ Select metrics for the report (energy, water, or waste).
- ✓ Select contacts for the report from the drop-down menu or add new contacts.

3 Generate Report

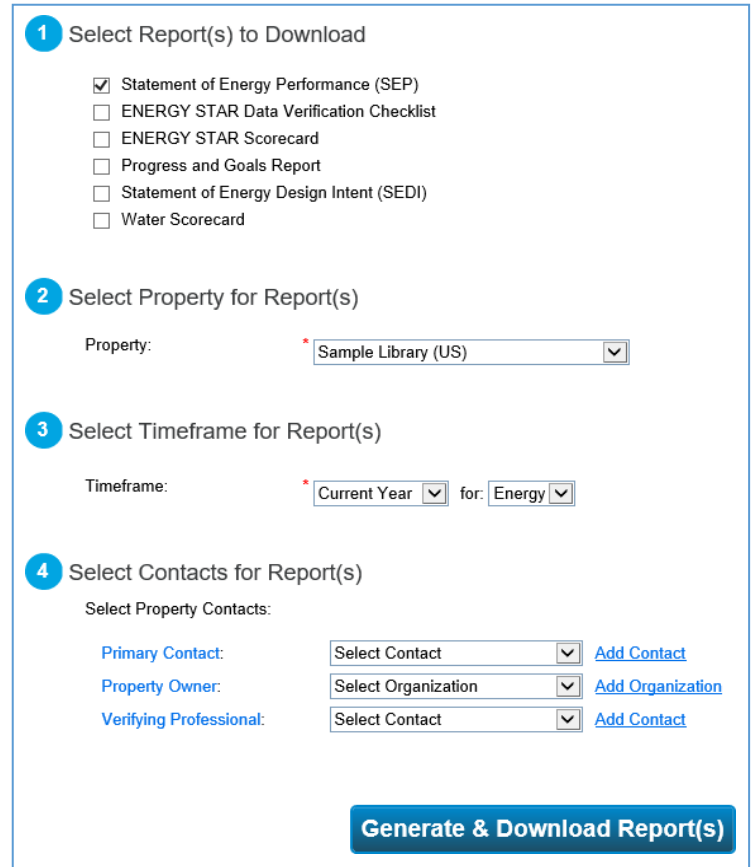
Click on the **Generate & Download Report(s)** button after you've completed each section of the page. If the report does not pop up, disable the pop-up blocker in your Internet Browser and try again.

 The selected property must have 12 full months of complete meter data to calculate the metrics on your report.

4 Save

Save a copy of the report for your records, if needed.

NOTE: The various "ENERGY STAR Performance Documents" open in a new tab. If you have pop-up blockers turned on, you'll need to temporarily enable the pop-ups to get to your report. After you enable pop-ups, try running the report again. It should automatically open in a new window.



1 Select Report(s) to Download

- ☒ Statement of Energy Performance (SEP)
- ☐ ENERGY STAR Data Verification Checklist
- ☐ ENERGY STAR Scorecard
- ☐ Progress and Goals Report
- ☐ Statement of Energy Design Intent (SEDI)
- ☐ Water Scorecard

2 Select Property for Report(s)

Property: *

3 Select Timeframe for Report(s)

Timeframe: * for:

4 Select Contacts for Report(s)

Select Property Contacts:

Primary Contact: [Add Contact](#)

Property Owner: [Add Organization](#)

Verifying Professional: [Add Contact](#)

Generate & Download Report(s)

Figure 5: Statement of Energy Performance data selection

Learn More!

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

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