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 nine standard reports available in the Reporting tab:

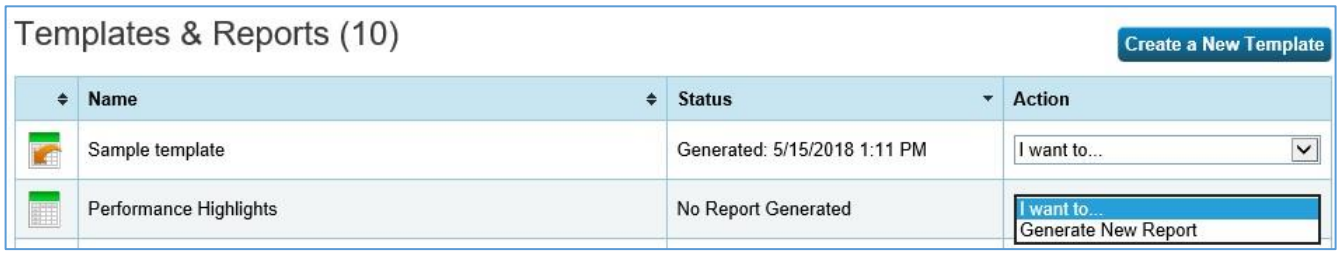
- ✓ Performance Highlights
- ✓ Energy Performance
- ✓ Emissions Performance
- ✓ Water Performance
- ✓ Fuel Performance
- ✓ ENERGY STAR Certification Status
- ✓ Partner of the Year Report
- ✓ Sustainable Buildings Checklist Report
- ✓ Waste Performance

> ***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 nine "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."



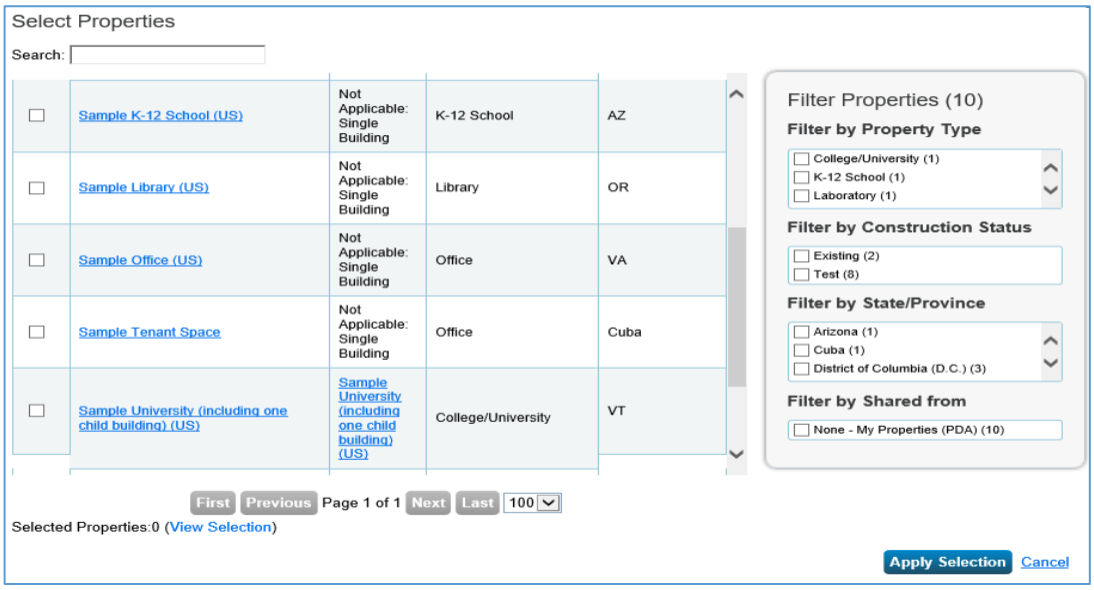
2 Define Report Content

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 2018 will generate metrics for the period 1/1/2018 to 12/31/2018.

   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:** 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.



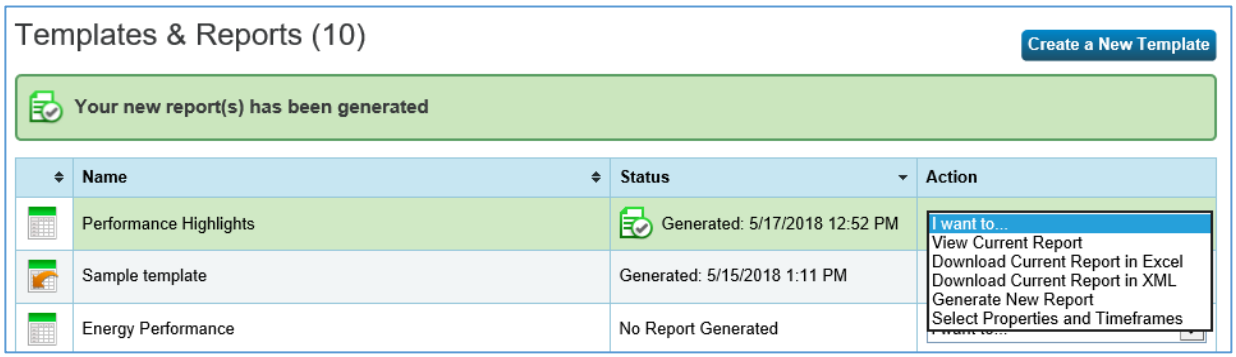
3. **Review Included Metrics:** The metrics in each pre-defined template were selected by EPA to help you understand key aspects of your performance. If you'd like to create your own report with different metrics than those already set up within Portfolio Manager, please see the Portfolio Manager Custom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

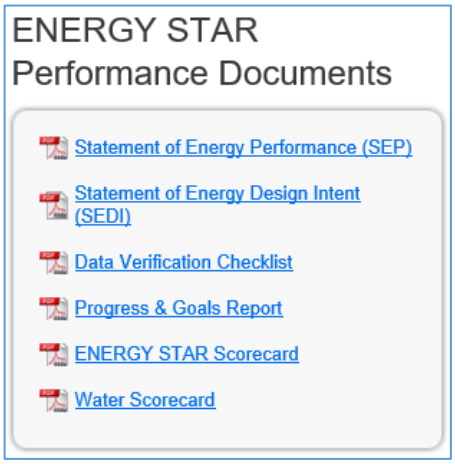
After you generate the report, you'll see a notification in **Templates & Reports** section of the **Reporting** tab. Once the report has been generated, the **Status** column indicates "Generated," along with the date and time the report was produced.



Select an option 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.

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.

2 Define Report Content

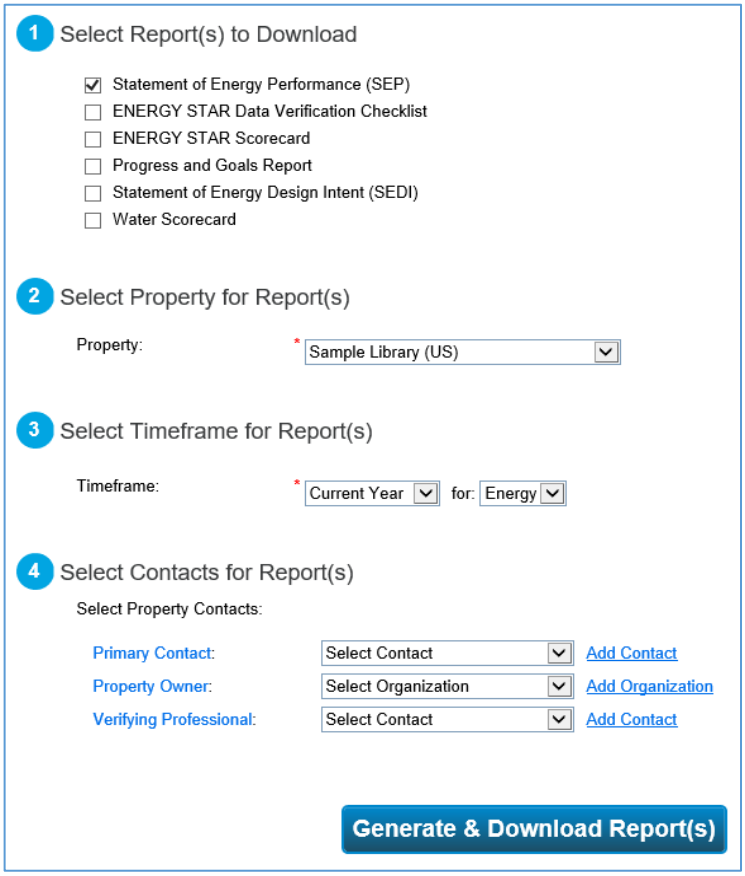
- ✓ Select properties to include in the report.
- ✓ Select a timeframe for the report.
- ✓ Select metrics for the report (energy, water, or waste).
- ✓ Select contacts for the report from the drop-down menu, or add new contacts.

3 Generate Report

Click on the **Generate & Download Report(s)** button after you've completed each section of the page.

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.

Learn More!

To learn more about Portfolio Manager, visit www.energystar.gov/benchmark.
To get answers to your questions, visit www.energystar.gov/buildingshelp.