

How to Respond to Data Requests in Portfolio Manager

EPA’s ENERGY STAR Portfolio Manager tool helps you measure and track the energy and water use, waste and materials, and greenhouse gas emissions of your buildings, 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 benchmarking and transparency policies.

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

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, guidance document, 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. Once you have initially accessed the data request by clicking on the external link, the data request will always appear within your Portfolio Manager account in the **Reporting** tab and can be accessed here at any time in the future.

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.

Figure 1: About Your Response selection

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 December 2022 will generate metrics for the period 1/1/2022 to 12/31/2022.

- ✓ **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.

Figure 2: Your Response section

Figure 3: List of properties to select from

Click **Generate Response Preview** after you have selected completed each section of the **Respond to Data Request** page. You will be redirected to the **Reporting** tab and will see a notification that your report is being generated.

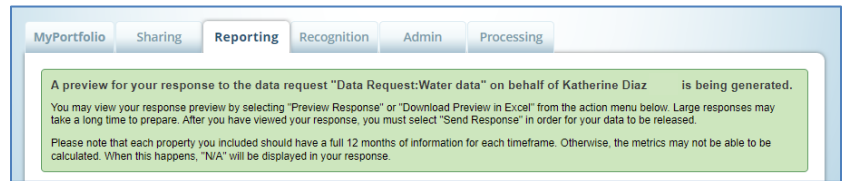


Figure 4: Data Response preview confirmation

NOTE: Your property must have 12 months of complete information for the requested data for each timeframe. Otherwise, the report will display “NA” if the metrics cannot be calculated.

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Preview Response

After you generate the response preview, you can view it in on the **Reporting** tab. You will see a notification in the **Data Requests from Others** section when your preview is available.

You can preview the response before sending it.

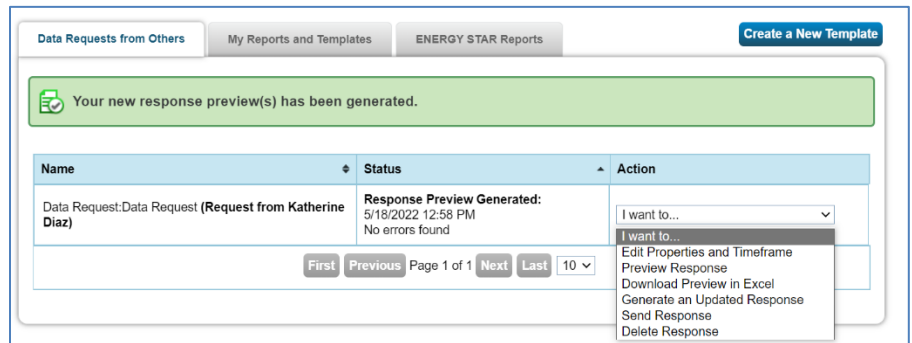


Figure 5: How to preview your response

- ✓ 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.

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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 **Finalize and Send Data Request** page.

- ✓ Select who else you want to receive a confirmation email by choosing a contact from your contact book
- ✓ 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**.

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.

Figure 6: Sending the response

Learn More!

To learn more about Portfolio Manager, visit <https://www.energystar.gov/buildings/benchmark>

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