

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.

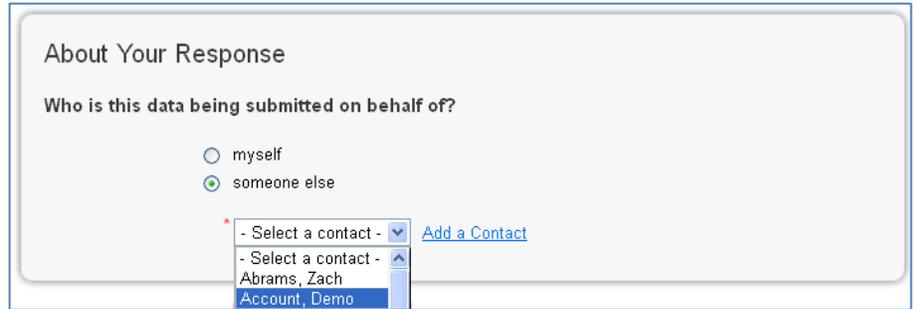
Click the link and then log in to Portfolio Manager as prompted. You will be directed to the **Respond to Data Request** page. Once you have initially accessed the data request by clicking on the external link, the data request will always appear within your Portfolio Manager account in the **Reporting** tab and can be accessed here at any time in the future.

2 Prepare a Response

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

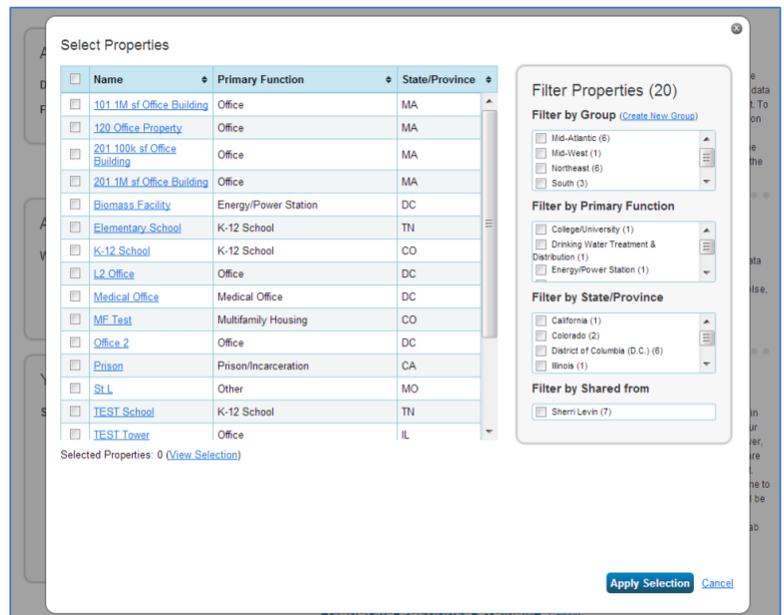
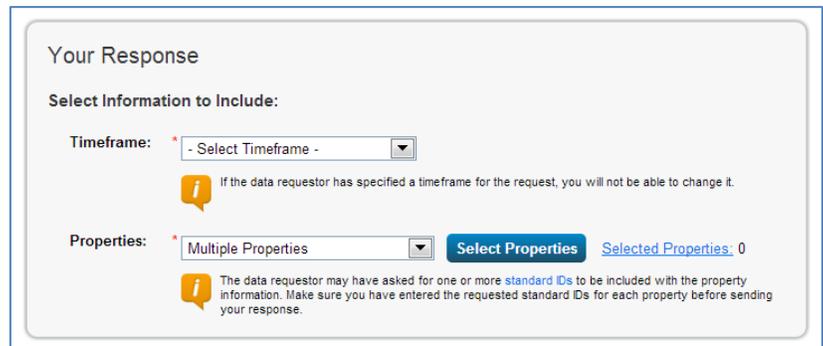
In the **About Your Response** section, select the user whose data is being submitted.

- ✓ 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.



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



Name	Primary Function	State/Province
101 1M of 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

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.

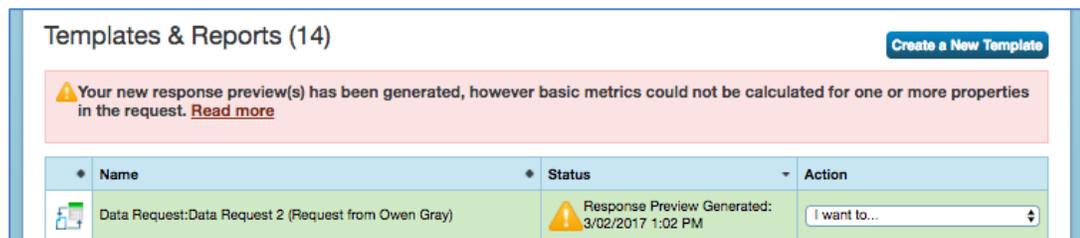


The screenshot shows the 'Templates & Reports (3)' interface. At the top right is a 'Create a New Template' button. Below it is a green notification bar: 'Your new response preview(s) has been generated.' Below the notification is a table with columns: Name, Date, and Action.

Name	Date	Action
Data Request: Test (Request from Jon Smith)	Response Preview Generated: 5/12/2013 5:43 PM	I want to... Preview Response Edit Properties and Timeframe Preview Response Download Preview in Excel Generate an Updated Response Send Response Delete Response
Sample EPA Report #2	No Spreadsheet Generated	
Sample EPA Report #1	No Spreadsheet Generated	

4 Data Quality Alerts

Portfolio Manager's Data Quality Alerts clearly identify mistakes and omissions so they can be corrected before you send the data request response. If Portfolio Manager determines your energy or water metrics cannot be calculated for one or more properties in the request, a pink alert box will appear after you generate the response preview. There will also be an alert icon next to the data request in the Templates and Reports Table.



The screenshot shows the 'Templates & Reports (14)' interface. At the top right is a 'Create a New Template' button. Below it is a pink alert box: 'Your new response preview(s) has been generated, however basic metrics could not be calculated for one or more properties in the request. [Read more](#)'. Below the alert is a table with columns: Name, Status, and Action.

Name	Status	Action
Data Request:Data Request 2 (Request from Owen Gray)	Response Preview Generated: 3/02/2017 1:02 PM	I want to...

Click "Read More" to go to the alert page, which will list all the properties affected. Links within the alerts will take you to the specific screen where the data issue can be fixed.

MyPortfolio Sharing **Reporting** Recognition

Data Request Response Has Missing Metrics (N/A's)

⚠️ Your data response contains 1 properties where Total Water Use could not be calculated.

When Total Water Use cannot be calculated, typically it means there is not 12 full months of complete meter data or there is a problem with your property's Gross Floor Area. Other water metrics may also be unavailable as a result.

Properties With Missing Metrics (N/A's) (1) (response preview generated 03/02/2017 01:02 PM EST)

Property ID	Property Name	Year Ending Date	Total Water Use
5716689	Hill Store	Not Available	<p>1) Property has no energy meters.</p> <p>Problem: There are no energy meters entered for this property. In order to track energy use and receive metrics, you must create an energy meter.</p> <p>What to do:</p> <ul style="list-style-type: none"> ▪ Create a meter and follow the steps to enter your energy bills. Make sure you select the meter(s) that should be included in your performance metrics.

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View 1 - 1 of 1

The bottom of the alert page will present three options.

1. *"I want to review/edit these properties."* Review and edit the properties to resolve the alerts, then generate a new report and submit data.
2. *"Generate an updated response."* Generate a new report to account for the changes/fixes made since the last report was generated.
3. *"I want to submit anyway."* Bypass the alerts and submit the data as a response to the request.

What Would You Like To Do?

 **I Want to Review/Edit these Properties**
 You can review individual properties/meters by using the links in the table above or [download it to Excel](#) in order to begin troubleshooting these issues.

 **I Thought I Fixed These Problems- I Want to [Generate an Updated Response](#)**
 If you have made changes to your data since your response was generated (03/02/2017 01:02 PM EST), you will need to re-generate the report in order for these changes to be reflected.

[Generate Updated Response](#)

 **I Want to Submit Anyway**
 If you have verified that any issues listed in the table above are not the result of a mistake, you can continue submitting your response. Note that an incomplete request could be considered invalid or non-compliant by the requestor so it is strongly encouraged that you fix any issue before proceeding.

[Send Response](#)
 (You will confirm your response on the next screen)

After updating your properties to fix errors or omissions, click “Generate an updated Response” to refresh the report. If any alerts remain, the pink alert box will appear on the Reporting tab after the revised report is generated.

5 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**.

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.

The screenshot shows the 'Confirm Response to Data Request' page for Andrew Schulte. The page is titled 'Confirm Response to Data Request from Andrew Schulte (My Organization)'. It includes a warning: 'By clicking Send Data, you will release data to Andrew Schulte (My Organization). You will receive a confirmation email with a receipt and a copy of the data attached.' The page is divided into three numbered steps:

- 1 Who (besides you) should we send a confirmation email to?**
 - Section: 'Select contacts from your contacts book:'
 - Dropdown menu: Andrew Schulte (aschulte@train), Kevin Fuisous (YourUserName)
 - Text: 'To select multiple contacts, hold down your Control (CTRL) key and click on each selection.'
 - Section: 'Optional- Additional Email Addresses:'
 - Text: 'Separate multiple emails by a comma or semicolon.'
- 2 What format would you like your data in for the email attachment?**
 - Radio buttons: Excel (selected), XML
- 3 E-Sign your Data Response, then "Send Data"**
 - Text: 'I hereby certify that I am releasing data about my properties, or on behalf of someone else, to Andrew Schulte with My Organization.'
 - Form fields: 'Your username:' and 'Your password:'
 - Buttons: 'E-Sign Response', 'Send Data', 'Cancel'

On the right side, there are two informational boxes:

- About Releasing Your Data:** 'Once you have chosen to release your data, there is no way to retract it. Please [click here](#) to identify any data issues before sending to avoid incomplete or incorrect data being released.'
- About Signing Your Response:** 'Please provide login credentials (username and password) to electronically sign your response.'

At the bottom, there are social media links for 'Follow Us' (Twitter, Facebook, YouTube, LinkedIn) and a footer with links for 'Contact Us', 'Privacy Policy', 'Browser Requirements', and 'ENERGY STAR Buildings & Plants Website'.

Learn More!

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