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.

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.”

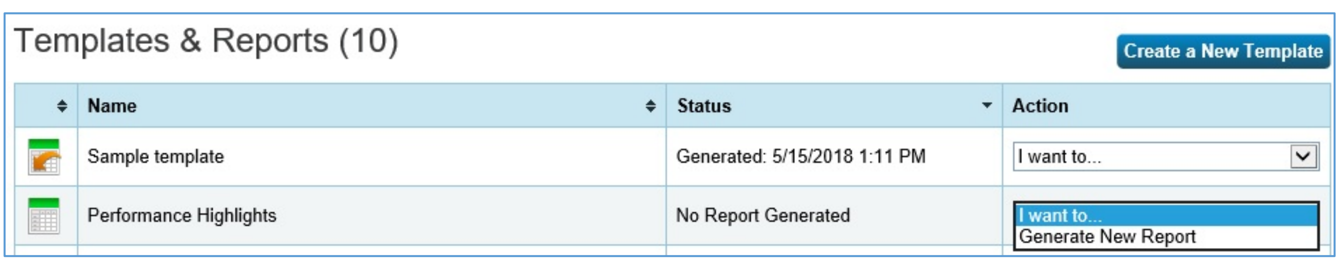

Fig 1: **Select a report to generate**

2 Define Reporting Requirements

1. To create your report, first select the timeframe of information to include as well as the properties from your account that you would like to see in the spreadsheet.
   - ✓ **Timeframe:** Select a timeframe from the drop-down menu.
   - ✓ Select energy, water, or waste from the drop-down menu.

   NOTE: Portfolio Manager generates annual metrics; the month you select is the last month of the 12-month reporting period. For example, selecting December 2016 will generate metrics of the period 11/1/2015 to 12/30/2016.

   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. Pick the **last day** of the 12-month period that you want.

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.

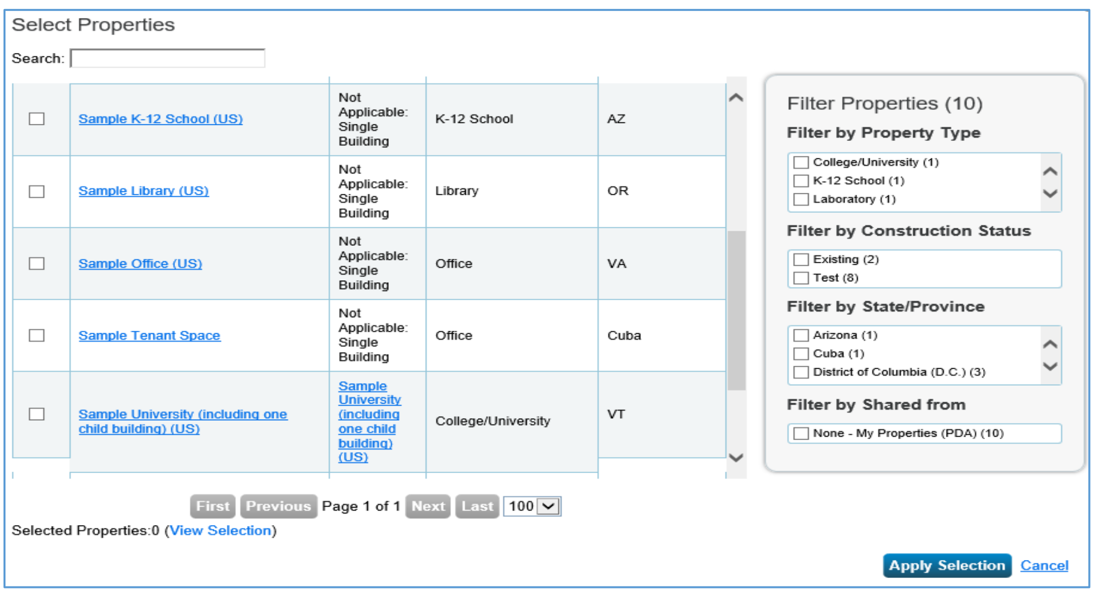

Fig 2: **Select Properties**

3. Review the list of included metrics. The metrics in this template were selected by EPA to help you understand key aspects of your performance. If you'd like to make your own report with different metrics, you can [create a new template](#).

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 on the **Reporting** tab in the **Templates & Reports** section. Once the report has been generated, the **Status** column indicates "Generated" with the date and time the report was produced.

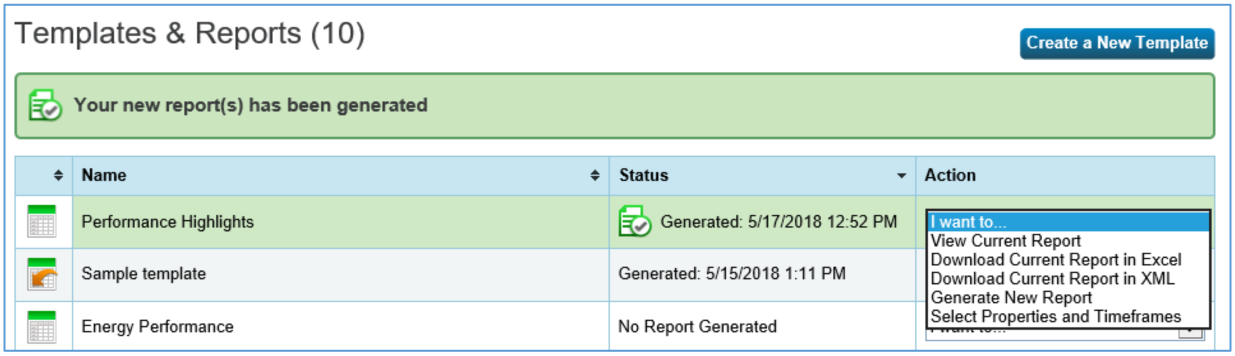

Fig 3: **View or download report**

Select an option from the **Action** drop-down menu next to the report. You can view the report in Portfolio Manager, download it in a different file type (XLS or XML), generate a new report after editing your template, or edit the template.

NOTE: If you want to select different properties or timeframes, 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'll need to go back to the Data Request link to access the request and begin a new response.

5 Save

Save your report in an accessible location.

How to Generate a Statement of Energy Performance

The Statement of Energy Performance (SEP) is a one-page report summarizing the energy consumption for a property. A Verifying Professional can sign and stamp it to verify the validity of the data, if needed. The SEP is not needed to apply for ENERGY STAR certification, but if you're applying for LEED, you'll need your SEP. Some localities may require it as part of local legislation.

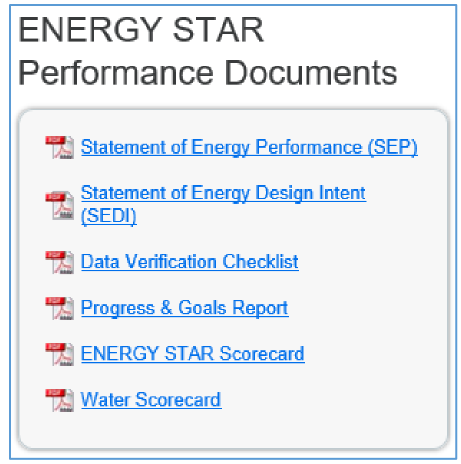

Fig 4: **List of ENERGY STAR performance documents**

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 Reporting Requirements

- ✓ 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 "ENERGY STAR Performance Documents" (SEP, SEDI, Progress & Goals, etc.) 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 this report. After you enable pop-ups, try running the report again. It should automatically open in a new window.

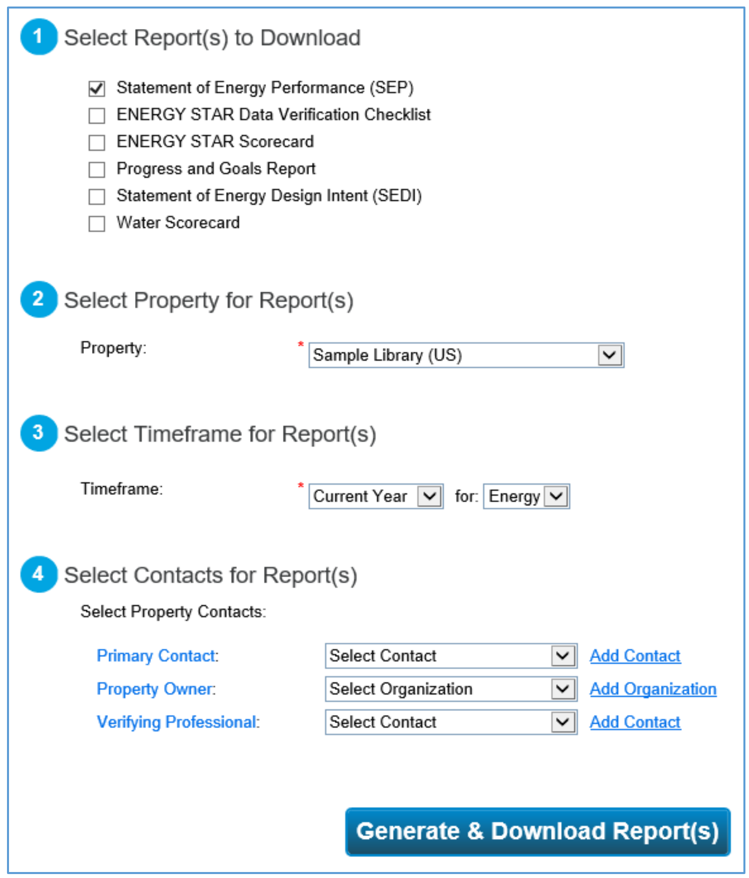

Fig 5: **Generate and download report**

Learn More!

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