

## Guide to Custom Reporting 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.

The reporting feature in Portfolio Manager offers a variety of reports and graphics to help you view and share performance metrics. This includes standard reports with popular metrics, as well as custom reports that allow you to select specific metrics and information to view in a table or export for further analysis.

To produce a custom report, you must first create a report template. You can then generate your report for download or display, share the template with others, or use the template to request data from other Portfolio Manager users. The ability to request data from others is especially valuable for voluntary and mandatory building benchmarking programs, which need a mechanism to collect and analyze energy performance data from a large number of participating properties. This document will guide you through the process of creating and working with Custom Reports.

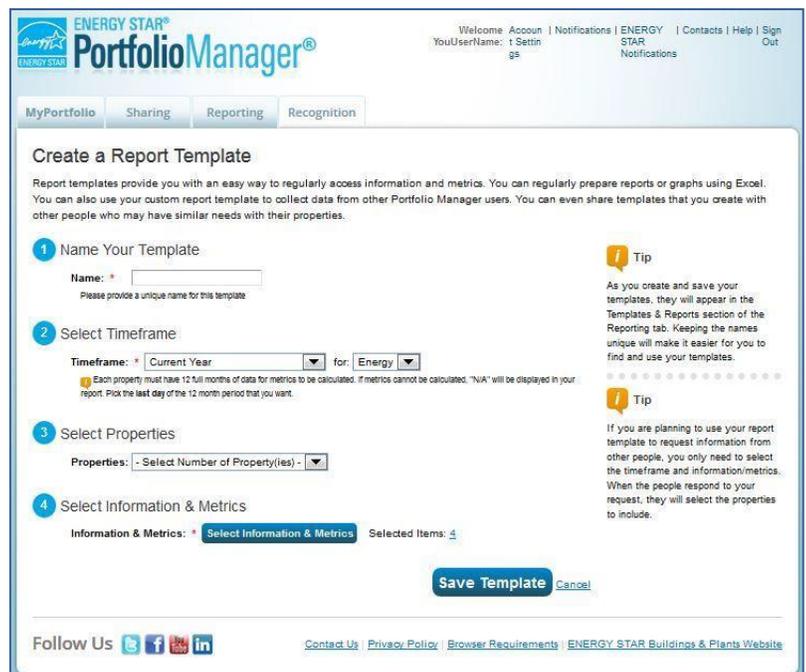
**Create a Custom Report**

1. Create a report template.
2. Use the template you created to:
  - Generate a custom report.
  - Share your template.
  - Request data from others.

### 1 Create a Report Template

Begin by defining the basic organization of your report (metrics, time periods, properties). Follow these easy steps:

1. Click the **Reporting** tab and then click **Create a New Template**.
2. Enter information in the four fields:
  - a. **Name:** Use a unique and descriptive name for the template (e.g., “Report Template for XYZ 2013 Energy Competition”).
  - b. **Timeframe:** Select a timeframe for which to generate data.



- c. **Properties to Include:** Select one, multiple, or all properties to include in the template. **NOTE:** If you select **All Properties**, Portfolio Manager creates a report with all properties in your account at that time. If you add new properties, or if properties are shared with you, you need to update the template and select **All Properties** again in order to include the new properties.
- d. **Information & Metrics to Include:** Select metrics across the 16 available categories to include in your template.
- i. Click **Select Information & Metrics** to see the list of available metrics.
  - ii. Click on a metrics category and check the boxes for the metrics you want to include in the template. Click **View Selection** at any time to view the metrics currently included in the template.
  - iii. Include Site EUI and Water Use (All Water Sources) in your selection of metrics so that reporters will receive data quality alerts that identify mistakes and omissions in their energy or water metrics.
  - iv. Click **Apply Selection** to finalize the list of chosen metrics.

## **Timeframe Options**

- ✓ **Current Year:** Returns metrics for the most recent year in which each of your properties has a full year of data for the selected resource type (energy/water/waste). This can be a different year for each property.
- ✓ **Baseline Year:** Returns metrics for the baseline period that you set on the “Goals” tab for each individual property. You can have different baselines for different resource types (energy/water/waste).
- ✓ **Compare Baseline Year:** Returns metrics for each property’s baseline period and another year which you specify.
- ✓ **Compare Current Year:** Returns metrics for each property’s current year and another year which you specify.
- ✓ **Current Year vs. Baseline Year:** Returns metrics for each property’s current year and its baseline year.
- ✓ **Single Year:** Returns metrics for a specific year that you specify.
- ✓ **Compare Two Years:** Returns metrics for each property in two specific years that you select.
- ✓ **Date Range:** Returns metrics for each property on a monthly, quarterly, or annual interval between a start and end date that you specify.



**Select Information & Metrics to Include** Selected items: 4 of 20 maximum ([View Selection](#))

Category	Selected Metrics
<b>Cost Performance Metrics</b>	<input type="checkbox"/> Alternative Water Generated On-Site - All Cost <input type="checkbox"/> Alternative Water Generated On-Site - Indoor Cost <input type="checkbox"/> Alternative Water Generated On-Site - Indoor Cost Intensity <input type="checkbox"/> Alternative Water Generated On-Site - Outdoor Cost <input type="checkbox"/> Coal (anthracite) Cost <input type="checkbox"/> Coal (bituminous) Cost <input type="checkbox"/> Coke Cost <input type="checkbox"/> Currency Type <input type="checkbox"/> Diesel Cost <input type="checkbox"/> District Chilled Water Cost <input type="checkbox"/> District Hot Water Cost <input type="checkbox"/> District Steam Cost <input type="checkbox"/> Electricity (Grid Purchase) Cost <input type="checkbox"/> Energy Cost
Data Accuracy	
Data Center Metrics	
Energy Performance Metrics	
ENERGY STAR Certification	
Energy Use by Fuel Source	
Greenhouse Gas Emissions	
Property Design	
Property ID Numbers	

Selected items: 4 of 20 maximum ([View Selection](#)) **Apply Selection** [Cancel](#)

- v. Click **Save Template** to save your selections. You will be taken back to the **Reporting** tab and you will receive a notification that your template has been successfully saved.

## 2

## Use the Template You Created

Put your template to work! Your new custom template will appear in the **Templates & Reports** section on the **Reporting** tab. You can choose the following options from the **Action** drop-down menu next to the name of the template.

- ✓ **Generate a New Report:** View and download a report based on your template.
- ✓ **Edit this Template:** Change your selection of metrics, time periods, or properties.
- ✓ **Share this Template:** Share your template with others.
- ✓ **Request Data using this Template:** Use your template to request data from others.
- ✓ **Delete this Template:** Delete your template if you no longer need it.

## Generate and View a Custom Report

Once you have created your template, you can generate a report to see data based on the specifications defined in your template.

1. Select **Generate New Report** from the **Action** drop-down menu next to the name of the custom template. When the report is ready, you will see a message that your report has been generated and it will appear in the **Templates & Reports** section at the bottom of the **Reporting** tab. If a large number of properties and/or metrics were selected for inclusion in your template, it may take a few minutes or longer to generate your report. Once the report has been generated, the **Status** column indicates “Generated” with the date and time the report was produced. **NOTE:** You no longer need to wait overnight for new data to be included in your report.
2. 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), edit your template, generate a new report after editing your template, share your template, request data, or delete the template.

**Templates & Reports (3)** Create a New Template

 **Your new spreadsheet(s) has been generated.**

	Name	Date	Action
	Custom Report Template 1	Generated: 5/16/2013 5:51 PM	<div style="border: 1px solid gray; padding: 2px;">                     I want to...                      I want to...  <b>View Current Report</b>                      Download Current Report in Excel                      Download Current Report in XML                      Generate New Report                      Edit this Template                      Share this Template                      Request Data using this Template                      Delete this Template                 </div>
	Sample EPA Report #2	No Spreadsheet Generated	
	Sample EPA Report #1	No Spreadsheet Generated	

 Generated spreadsheets will be available for 30 days past the generation date, after which time a new spreadsheet must be generated for the template.
 
 [Learn More About Using Data Spreadsheet Templates](#)

# Share Your Template

You can share a copy of your custom report template with any of your contacts with whom you are connected, allowing the contacts to use the template to run reports on properties in their own portfolios.

1. Select **Share this Template** from the **Action** drop-down menu next to the designated spreadsheet. **NOTE:** Any subsequent edits you make to the template will not affect the copy you shared with others. Likewise, any edits your contacts make do not affect your copy of the template.
2. Select the contacts with whom you want to share your template, and then click **Share Template** (NOTE: the option to select contacts only displays/expands if you select the first box). Keep in mind that sharing a template does not share any data that you may have populated into your own report using that template.
3. You can also choose for Portfolio Manager to provide a custom link that will allow any user to copy the template to their account. To generate the link, select the second check box and click **Share Template**. Portfolio Manager then generates a unique link at the top of the **Reporting** tab that you can copy and paste in to an email and send to users with whom you are not connected.

The screenshot shows the 'Share Your Custom Report Template' dialog in the Portfolio Manager interface. The dialog is titled 'Share Your Custom Report Template' and has a sub-header 'Portfolio Manager allows you to share a copy of your custom report template with other individuals who use Portfolio Manager. You can choose to create a copy directly into your connected contacts accounts or have Portfolio Manager provide you with a link that you can give to people in order for them to copy the template into their own account.'

Under 'How would you like to share your report template?', there are two radio buttons. The first, 'Share template directly into [connected contact](#) accounts', is selected. Below it is a 'Select contacts from my contacts book:' dropdown menu showing 'Joe Smith (arsdemoaccount)' and 'Kevin Fuscus (YouUserName)'. A note says 'To select multiple contacts, hold down your Control (CTRL) key and click on each selection.'

The second radio button, 'Provide a link that any person can use to copy the template into their own Portfolio Manager account', is unselected. A 'Share Template' button is at the bottom right.

Below the dialog, a green notification box states: 'The link to share your report template has been created. https://portfoliomanager.energystar.gov/cmi/reports/template/2409103/share/ae3659e4-a216-4b0e-9e5a-5b2513129a50. Please share this link with others in order for them to copy your report template into their own Portfolio Manager accounts. If they do not currently have an account, they will be required to create one before they can see the report template.'

Below the notification, there are sections for 'Charts & Graphs' and 'ENERGY STAR Performance Documents'. The 'Charts & Graphs' section shows a chart titled 'Weather Normalized Source EUI' with the question 'How much total primary fuel would be required by my properties, under average weather conditions?'. The 'ENERGY STAR Performance Documents' section lists several documents: 'Statement of Energy Performance (SEP)', 'Statement of Energy Design Intent (SEDI)', 'Data Verification Checklist', 'Progress & Goals Report', 'ENERGY STAR Scorecard', and 'Water Scorecard'.

# Request Data from Others

You can also request data from other Portfolio Manager users. By asking others to complete your template with information from their accounts, you will receive the data you need in order to report on program results.

Follow these steps to request data:

1. Select **Request Data using this Template** from the **Action** drop-down menu next to the designated template.
2. On the **Create a Data Request** page, enter information in the four fields:
  - a. **Name:** This field is pre-populated with the name of your template; however, you can change the name when requesting data from others. If you will be making multiple data requests from the same template, you may want to make the names unique.
  - b. **Verify the Data you are Requesting:** Choose a new timeframe or no timeframe (which allows recipients to choose their own). Selecting a location limits users to only releasing data from

**Aggregate Collected Data**

You can request data from multiple Portfolio Manager users. Portfolio Manager aggregates the collected data into one custom report, from which you can calculate many summary statistics or program figures, such as total greenhouse gas emission reductions or total cost savings.

properties located in the specified country or state. Indicate whether you will need to collect a language preference from your respondents. The information and metrics in your template will also be displayed. To make changes to the metrics, go to the previous page and select **Edit this Template** from the **Action** drop-down menu.

- c. **Identify a Contact Person:** Select a contact person whose information is sent with the request, so users know who they can contact if they have questions (not shown in screenshot).
- d. **Provide Detailed Instructions for Your Request:** Provide additional information, time periods, or any other information that (not shown in screenshot).

Metric Category	Metric Name
Property ID Numbers	Portfolio Manager Property ID
Property Information	Property Name
Property ID Numbers	Portfolio Manager Parent Property ID
Property Information	Parent Property Name

3. Click **Save Request** to save the request, or click **Publish Request** to finalize the request. After you publish the request, you will see a confirmation page, which includes a copy of your instructions and a dedicated URL that others will use to access and complete your reporting request. You must include this URL in any communications to your recipients so they can access your data request.

## **The Difference Between Sharing and Requesting Data from Others**

When a connected contact shares a property with you, you can view that property's data at any time. If you include that property in any of your reports for any time period, the report will pull the most up-to-date information for the property from the contact's account.

When a Portfolio Manager user responds to your data request, you will only receive the information and metrics specified in the data request template for the specified time period, and only at times when the user responding to your request chooses to send the data to you

## Report Guidance

The custom reporting feature allows users to view and analyze data in new and exciting ways, and can help to calculate the impacts of individual energy efficiency measures or the results of a comprehensive efficiency program. For example, you can identify which of your properties has the highest score or lowest greenhouse gas emissions footprint, or inform investment decisions by ranking your properties by energy costs. As you use the reporting feature, please note:

- ✓ Reports return values for each metric in each selected time period.
- ✓ Reports with two time periods automatically calculate the change in each metric for each property between the two selected time periods, and display this information on the **Comparisons** tab. This allows you to easily calculate useful energy savings statistics for your portfolio. **NOTE:** A property must have a value in each time period in order to be included in the **Comparisons** tab.

- ✓ Using the **Request Data using this Template** feature, you can obtain the same metrics for the same time period(s) for all properties that return data. This is useful for energy efficiency programs seeking to aggregate energy savings across participating buildings in order to calculate program impact.

As you develop your custom report template(s), consider whether there are any additional statistics that you would like to be able to calculate from the returned data, and make sure that the necessary metrics are included in your template to allow you to make these calculations. The **Comparisons** tab can provide the change in specific metrics between two periods, but further calculations may be necessary if you want to obtain portfolio-wide aggregate metrics, such as:

- ✓ Average improvement in ENERGY STAR score across portfolio, weighted by property size (include ENERGY STAR score and property floor area in your template).
- ✓ Total portfolio percent savings since baseline (include source energy use in your template).
- ✓ Portfolio-wide average energy savings per square foot (include source EUI and property floor area in your template).
- ✓ Average property percent savings across portfolio (include source energy use in your template).
- ✓ Portfolio-wide average cost savings per square foot (include energy cost and property floor area in your template).

### **Learn More!**

To learn more about Portfolio Manager, visit [www.energystar.gov/benchmark](http://www.energystar.gov/benchmark).  
To get answers to your questions, visit [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp).