



MyPortfolio

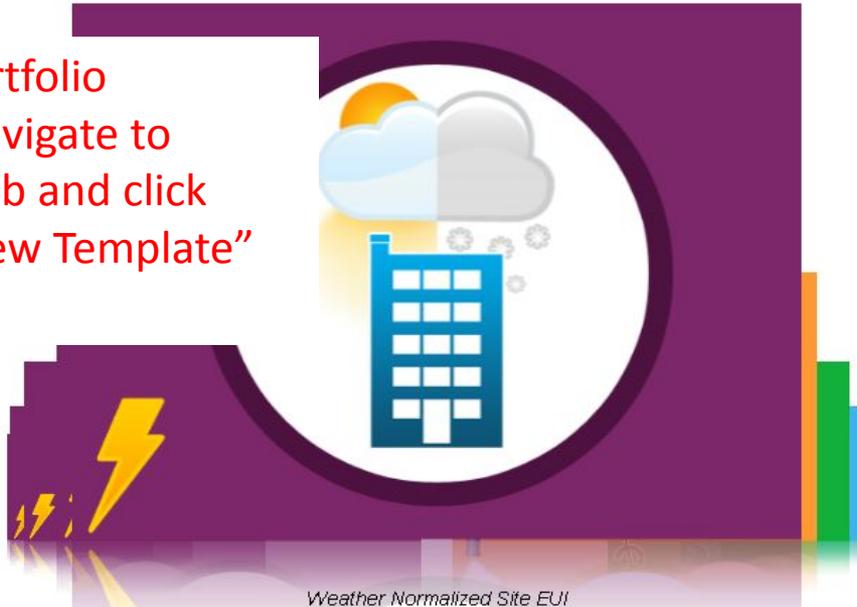
Sharing

Planning

**Reporting**

Recognition

## Charts & Graphs



How much energy would be reported on my bills, under average weather conditions?

## ENERGY STAR Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Score Card](#)

Log in to Portfolio Manager, navigate to Reporting tab and click "Create a New Template" button

## Templates & Reports (18)

**Create a New Template**

Your new report(s) has been generated

Name	Status	Action
Current Year	Generated: 7/23/2015 4:14 PM	I want to...



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## Create a Report Template

Report templates provide you with an easy way to regularly access information and metrics. You can regularly prepare reports or graphs using Excel. You can also use your custom report template to collect data from other Portfolio Manager users. You can even share templates that you create with other people who may have similar needs with their properties.

### 1 Name Your Template

Name: \*

Please provide a unique name for this template

← Enter Name



Tip

As you create and save your templates, they will appear in the Templates & Reports section of the Reporting tab. Keeping the names unique will make it easier for you to find and use your templates.

### 2 Select Timeframe

Timeframe: \*

Each property displayed in your report will be calculated. Select the timeframe that you want

- Current Year
- Baseline Year
- Single Year
- Compare Two Years
- Compare Baseline Year
- Compare Current Year
- Current Year vs. Baseline Year
- Date Range

← Select "Baseline Year" Time frame

### 3 Select Properties

Properties: \*

### 4 Select Information & Metrics

Information & Metrics: \*  Selected Items: [4](#)

[Cancel](#)



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### 1 Name Your Template

Name: \*

Please provide a unique name for this template

### 2 Select Timeframe

Timeframe: \*

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.

### 3 Select Properties

Properties: \*

### 4 Select Information & Metrics

Information & Metrics

- Select Number of Property(ies) -
- Select Number of Property(ies) -
- One Property
- Multiple Properties**
- All Properties
- Properties in a Group

← Select "Multiple Properties"



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Tip

If you are planning to use your report template to request information from other people, you only need to select the timeframe and information/metrics. When the people respond to your request, they will select the properties to include.

**Save Template** [Cancel](#)



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### 3 Select Properties

Properties: \*  **Select Properties** Selected Items: 0

### 4 Select Information & Metrics

Information & Metrics: \* **Select Information & Metrics** Selected Items: 4



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**Save Template** [Cancel](#)

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# Create a Report Template

Check box to  
Select all filtered properties

## Select Properties

<input type="checkbox"/>	Name	Part of Larger Property	Primary Function	State/Province
<input type="checkbox"/>	<a href="#">Algonquin Wastewater Treatment Facility</a>	Not Applicable: Single Building	Wastewater Treatment Plant	IL
<input type="checkbox"/>	<a href="#">Allstate Arena</a>	Not Applicable: Single Building	Performing Arts	IL
<input type="checkbox"/>	<a href="#">Alpha Park Public Library</a>	Not Applicable: Single Building	Library	IL
<input type="checkbox"/>	<a href="#">Arthur Sewage Plant</a>	Not Applicable: Single Building	Wastewater Treatment Plant	IL
<input type="checkbox"/>	<a href="#">Canaryville Public Library</a>	Not Applicable: Single Building	Library	IL
<input type="checkbox"/>	<a href="#">Carol Stream Water Reclamation Plant</a>	Not Applicable: Single Building	Wastewater Treatment Plant	IL
<input type="checkbox"/>	<a href="#">Central Athletic Center - Wheaton Park District</a>	Not Applicable: Single Building	Fitness Center/Health Club/Gym	IL
<input type="checkbox"/>	<a href="#">Creve Coeur Waste Water Treatment Plant</a>	Not Applicable: Single Building	Wastewater Treatment Plant	IL

### Filter Properties (2161)

Filter by Group [\(Create New Group\)](#)

- Arizona (67)
- Hawaii (224)
- Illinois (36)
- Iowa (1184)

Filter by Primary Function

- Adult Education (1)
- College/University (48)
- Courthouse (47)
- Data Center (2)

Filter by Construction Status

Existing (2161)

Filter by State/Province

- Arizona (67)
- Hawaii (224)
- Illinois (36)
- Iowa (1184)

Filter by Shared from

- B3 Benchmarking (1184)
- Barbara Meyer (65)
- Daniel Hagan (24)
- David St. Jean (63)

Selected Properties: 0 [\(View Selection\)](#)

[Apply Selection](#) [Cancel](#)

Using filters, choose properties to include in report



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### 3 Select Properties

Properties: \*

[Select Properties](#)

Selected Items: [36](#)

### 4 Select Information & Metrics

Information & Metrics: [Select Information & Metrics](#) Selected Items: [4](#)



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[Save Template](#)

[Cancel](#)

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- Property Name
- Parent Property Name
- Portfolio Manager Property ID
- Portfolio Manager Parent Property ID
- Primary Property Type - Self Selected
- Primary Property Type - EPA Calculated
- Year Built
- State/Province
- Number of Buildings
- Property Floor Area (Building(s)) (ft<sup>2</sup>)
- National Median Reference Property Type
- Energy Baseline Date
- Energy Current Date
- National Median Source EUI (kBtu/ft<sup>2</sup>)
- National Median Water/Wastewater Source EUI (kBtu/gpd)
- Source Energy Use (kBtu)
- Weather Normalized Source EUI (kBtu/ft<sup>2</sup>)
- ENERGY STAR Score
- Difference from National Median Water/Wastewater Source EUI
- Difference from National Median Source EUI
- Alert - Data Center does not have an IT Meter
- Alert - Gross Floor Area is 0 ft<sup>2</sup>
- Alert - Individual monthly meter entry is more than 65 days long
- Alert - Meter has overlaps
- Alert - Meter has gaps
- Alert - Meter has less than 12 full calendar months of data
- Alert - No meters are associated with this property
- Alert - Property has no uses
- Water/Wastewater Source EUI (kBtu/gpd)

Select these reporting items for the template



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### 3 Select Properties

Properties: \*

[Select Properties](#)

Selected Items: [36](#)

### 4 Select Information & Metrics

Information & Metrics: \* [Select Information & Metrics](#)

Selected Items: [29](#)



Tip

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Tip

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[Save Template](#)

[Cancel](#)

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Generate a new report using the template you created

Performance Documents

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SED\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Score Card](#)

Weather Normalized Site EUI

How much energy would be reported on my bills, under average weather conditions?

Templates & Reports (18)

Create a New Template

Your new report(s) has been generated

Name	Status	Action
Current Year	Generated: 7/24/2015 5:05 PM	I want to...
Data Request: SEP LBE report template (Request from Chris Stratton)	No Response Preview Generated	I want to...
Data Request: test (Request from Jason Powers)	No Response Preview Generated	I want to...
Data Request: mandatory items report (Request from Chris Stratton)	No Response Preview Generated	I want to...
Data Request: SEP LBE report template (Request from Jason Powers)	No Response Preview Generated	I want to...
Baseline Year	Generated: 7/13/2015 1:27 PM	I want to...
Date range	Generated: 7/10/2015 4:16 PM	I want to... View Current Report Download Current Report in Excel Download Current Report in XML <b>Generate New Report</b> Edit this Template Share this Template Request Data using this Template Delete this Template
Energy Performance	Generated: 10/17/2014 6:35 PM	
Performance Highlights	Generated: 10/17/2014 4:20 PM	

Generated reports will only be available for 30 days. After that time you will need to generate a new report to obtain data with your template.

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Once the report has been generated, download it as an Excel file

- [Statement of Energy Performance \(SEP\)](#)
- [Statement of Energy Design Intent \(SEDI\)](#)
- [Data Verification Checklist](#)
- [Progress & Goals Report](#)
- [ENERGY STAR Score Card](#)

Weather Normalized Site EUI

How much energy would be reported on my bills, under average weather conditions?

### Templates & Reports (18)

Create a New Template

Your new report(s) has been generated

Name	Status	Action
Baseline Year	Generated: 7/24/2015 6:19 PM	I want to... I want to... View Current Report Download Current Report in Excel
Current Year	Generated: 7/24/2015 5:05 PM	Download Current Report in XML Generate New Report Edit this Template Share this Template Request Data using this Template Delete this Template
Data Request: SEP LBE report template (Request from Chris Stratton)	No Response Preview Generated	I want to...
Data Request: test (Request from Jason Powers)	No Response Preview Generated	I want to...
Data Request: mandatory items report (Request from Chris Stratton)	No Response Preview Generated	I want to...
Data Request: SEP LBE report template (Request from Jason Powers)	No Response Preview Generated	I want to...
Date range	Generated: 7/10/2015 4:16 PM	I want to...
Energy Performance	Generated: 10/17/2014 6:35 PM	I want to...
Performance Highlights	Generated: 10/17/2014 4:20 PM	I want to...

Generated reports will only be available for 30 days. After that time you will need to generate a new report to obtain data with your template.

Baseline Year - Lotus [Read-Only] - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number

Baseline Year

1 **Baseline Year**

2 Date Generated: 07/24/2015 06:19 PM EDT

3 Number of properties in report: 36

Property ID	Property Name	Year Ending	Primary Property Type - Self Selected	Primary Property Type - EPA Calculated	Year Built	State, Province
3643864	proviso math	12/31/2011	K-12 School	K-12 School	1991	Illinois
3644118	Westmont Junior High School	2/29/2012	K-12 School	K-12 School	1974	Illinois
3644143	Fossil Ridge Public Library	6/30/2012	Library	Library	1983	Illinois
3644168	Hillside					Illinois
3644175	Riversid Library					Illinois
3644187	Alpha Pa Library					Illinois
3666198	Algonqu Wastew					Illinois
3670722	Arthur S Carol Str Reclama					Illinois
3670740	Crystal L Wastew					Illinois
3672915	LaSalle W Treatme					Illinois
3673303	Creve Co Water Treatment	7/31/2010	Treatment Plant	Not Available	1984	Illinois
3673561	Park District of Franklin Park Service	3/31/2011	Repair Services (Vehicle, Shoe)	Repair Services (Vehicle, Shoe)	1969	Illinois
3673778	Millennium Centre Condo	No Baseline Set	Multifamily Housing	Not Available	2003	Illinois
3681538	McMillian Pavilion - MWRD Floors 1-7	12/31/2011	Office	Office	1984	Illinois
3681615	Van Cleef Hair Studio	11/30/2011	Personal Services (Health/Beauty, Dry Fitness)	Personal Services (Health/Beauty, Dry Fitness)	1912	Illinois
3681846	Central Athletic Center - Wheaton	12/31/2010	Center/Health	Center/Health	1953	Illinois
3685581	Canaryville Public Library	10/31/2011	Library	Library	2000	Illinois
3685613	Orland Hills Community Center	12/31/2012	Other - Recreation	Other - Recreation	2001	Illinois
3685639	Niles West High School	No Baseline Set	K-12 School	Not Available	1956	Illinois
3685675	Stickney Forest View Library	No Baseline Set	Library	Not Available	1950	Illinois
3685697	Markham Police and Fire	12/31/2012	Police Station	Police Station	1955	Illinois
	Lake Barrington					

Information and Metrics

Average: 2394572.905 Count: 1839 Sum: 474125436

Open downloaded "Baseline Year" report, select all and copy

OWP\_report\_2015\_07\_24.xlsx - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Add-Ins Acrobat Team

Clipboard Font Alignment Number

Baseline Year

1 **Baseline Year**

2 Date Generated: 07/10/2015 07:22 PM EDT

3 Number of properties in report: 36

Property ID	Property Name	Year Ending	Primary Property Type - Self Selected	Primary Property Type - EPA Calculated	Year Built	State, Province	Number of Buildings	Property Floor Area (Building(s)) (ft <sup>2</sup> )
3643864	proviso math						1	226
3644118	Westmont Junior High School						1	89
3644143	Fossil Ridge Pub Library						1	13
3644168	Hillside Public L						1	Not Available
3644175	Riverside Public Library						1	17
3644187	Alpha Park Publ Library						1	20
3666198	Algonquin Wastewater						8	Not Available
3670722	Arthur Sewage F Carol Stream W Reclamation Pla						4	Not Available
3670740	Crystal Lake Wastewater						5	15
3670782	LaSalle Wastewater Treatment Plant	No Baseline Set	wastewater Treatment Plant	Not Available	1990	Illinois	2	Not Available
3672915	Creve Coeur Waste Water Treatment						2	Not Available
3673303	Park District of Franklin Park Service	7/31/2010	Treatment Plant	Not Available	1984	Illinois	2	Not Available
3673561	Millennium Centre Condo	3/31/2011	Repair Services (Vehicle, Shoe)	Repair Services (Vehicle, Shoe)	1969	Illinois	2	11
3673778	McMillian Pavilion - MWRD Floors 1-7	No Baseline Set	Multifamily Housing	Not Available	2003	Illinois	1	Not Available
3681538	McMillian Pavilion - MWRD Floors 1-7	12/31/2011	Office	Office	1984	Illinois	1	93

Information and Metrics

Average: 2394572.905 Count: 1839 Sum: 474125436

In report spreadsheet, choose the "Baseline Year" tab, select all and paste content from downloaded report

Graphs and tables in all tabs should then update automatically