



MyPortfolio

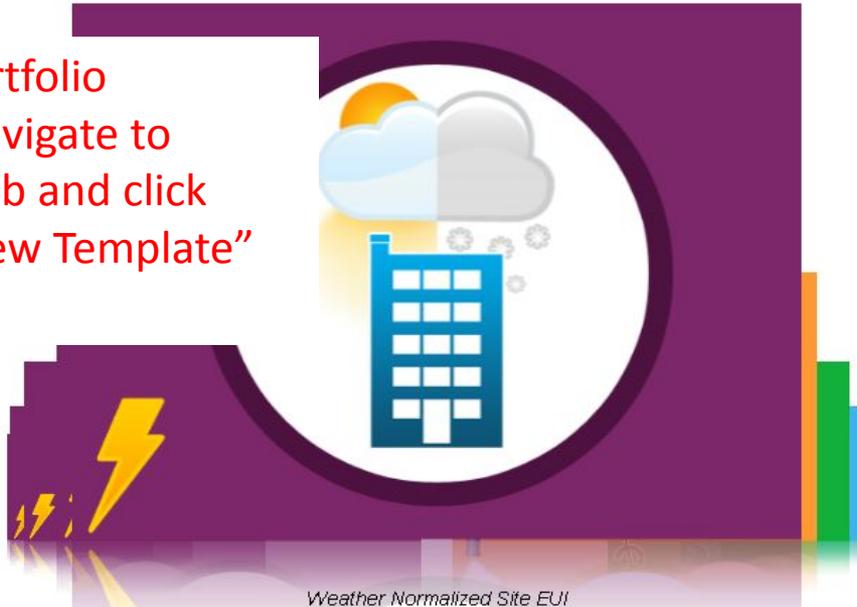
Sharing

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

### 2 Select Timeframe

Timeframe: \*   
Each property displayed in your report will use the metrics to be calculated for the period that you want to compare.  
Baseline Year  
Single Year  
Compare Two Years  
Compare Baseline Year  
Compare Current Year  
Current Year vs. Baseline Year  
Date Range

← Select "Current 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: \*

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

### 4 Select Information & Metrics

Information & Metrics



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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.

Select "Multiple Properties"

Save Template [Cancel](#)



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### 1 Name Your Template

Name: \*

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### 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: \*  [Select Properties](#) Selected Items: 0

### 4 Select Information & Metrics

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

[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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### 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: \*

[Select Properties](#)

Selected Items: [36](#)

### 4 Select Information & Metrics

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



Tip

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Tip

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

- 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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## Edit Report Template: Current Year

### 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: \*

[Select Properties](#)

Selected Items: [36](#)

### 4 Select Information & Metrics

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

Selected Items: [29](#)

[Save Template](#)

[Cancel](#)



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Tip

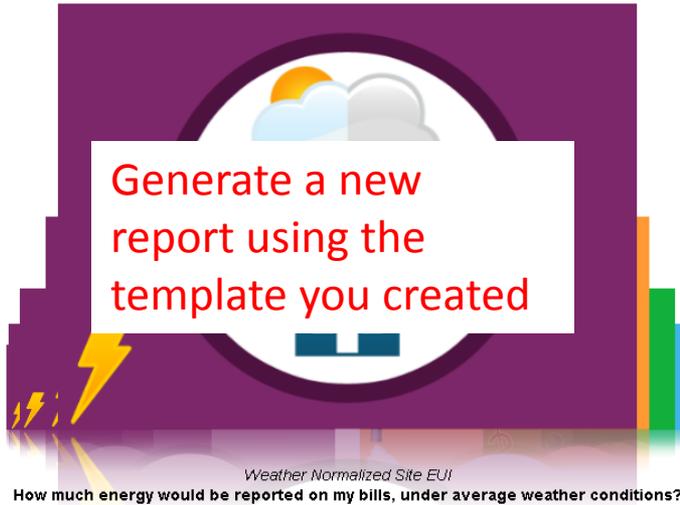
If you are planning to use your report template to request information from other people, you only need to select the timeframe and information/metrics. When the people respond to your request, they will select the properties to include.

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## Charts & Graphs



**Generate a new report using the template you created**

*Weather Normalized Site EUI*

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

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## Templates & Reports (18)

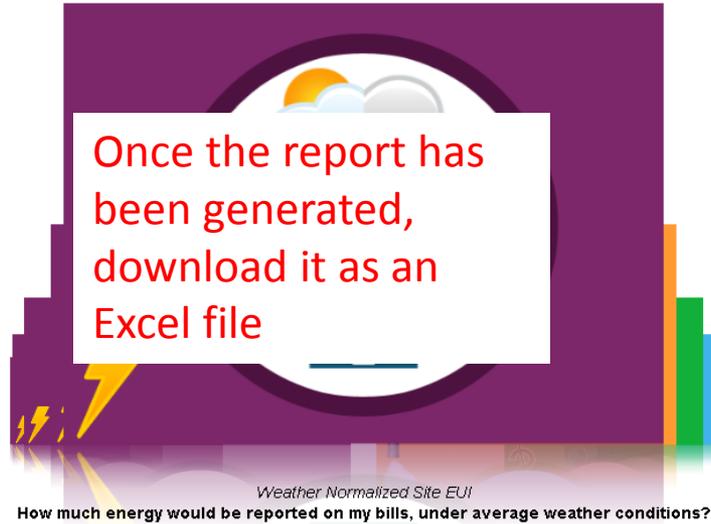
Create a New Template

| Name                             | Status                       | Action   |
|----------------------------------|------------------------------|--|
| SEP LBE report template          | Generated: 6/17/2014 1:03 PM | I want to...   |
| test                             | Generated: 1/15/2014 1:36 PM | I want to...   |
| Current Year                     | No Report Generated          | I want to...   |
| mandatory items report           | No Report Generated          | I want to...<br>Generate New Report<br>Edit this Template<br>Share this Template<br>Request Data using this Template<br>Delete this Template |
| Emissions Performance            | No Report Generated          | I want to...   |
| Water Performance                | No Report Generated          | I want to...   |
| Fuel Performance                 | No Report Generated          | I want to...   |
| ENERGY STAR Certification Status | No Report Generated          | I want to...   |
| Partner of the Year Report       | No Report Generated          | 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.



## Charts & Graphs



## ENERGY STAR Performance Documents

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## 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...<br>I want to...<br>View Current Report<br><b>Download Current Report in Excel</b><br>Download Current Report in XML<br>Generate New Report<br>Edit this Template<br>Share this Template<br>Request Data using this Template<br>Delete this Template |
| Data Request: SEP LBE report template (Request from Chris Stratton) | No Response Preview Generated |  |
| Data Request: test (Request from Jason Powers)                      | No Response Preview Generated |  |
| Data Request: mandatory items report (Request from Chris Stratton)  | No Response Preview Generated |  |
| 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...   |



Current Year

Date Generated: 07/24/2015 05:05 PM EDT

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             | 12/31/2011                  | K-12 School                                    | K-12 School                                    | 1974       | Illinois       |
| 3644143     | Fossil Ridge Public Library             | 6/30/2013                   | Library  | Library  | 1983       | Illinois       |
| 3644168     | Hillside Public Library                 | 3/31/2013                   | Library  | Library  | 1975       | Illinois       |
| 3644175     | Riverside Public Library                |                             |  |  |            | Illinois       |
| 3644187     | Alpha Pa Library                        |                             |  |  |            | Illinois       |
| 3666198     | Algonqu Wastew                          |                             |  |  |            | Illinois       |
| 3670722     | Arthur S Carol Str                      |                             |  |  |            | Illinois       |
| 3670740     | Redama Crystal L Wastew                 |                             |  |  |            | Illinois       |
| 3670782     | LaSalle V                               |                             |  |  |            | Illinois       |
| 3672915     | Treatme Creve Co Water Tr               |                             |  |  |            | Illinois       |
| 3673303     | Park Distrus on Franklin Park Service   | 10/31/2011                  | repair services (Vehicle, Shoe)                | repair services (Vehicle, Shoe)                | 1969       | Illinois       |
| 3673778     | Millennium Centre Condo                 | No Current Year Ending Date | Multifamily Housing                            | Not Available                                  | 2003       | Illinois       |
| 3681538     | McMillan Pavilion - MWRD Floors 1-7     | 12/31/2011                  | Office   | Office   | 1984       | Illinois       |
| 3681615     | Van Cleef Hair Studio                   | 4/30/2012                   | Personal Services (Health/Beauty, Dry Fitness) | Personal Services (Health/Beauty, Dry Fitness) | 1912       | Illinois       |
| 3681846     | Central Athletic Center - Wheaton       | 12/31/2011                  | Center/Health                                  | Center/Health                                  | 1953       | Illinois       |
| 3685581     | Canaryville Public Library              | 10/31/2012                  | Library  | Library  | 2000       | Illinois       |
| 3685613     | Orland Hills Community Center           | 12/31/2012                  | Other - Recreation                             | Other - Recreation                             | 2001       | Illinois       |
| 3685639     | Niles West High School                  | No Current Year Ending Date | K-12 School                                    | Not Available                                  | 1956       | Illinois       |
| 3685675     | Stokney Forest View Library             | No Current Year Ending Date | Library  | Not Available                                  | 1950       | Illinois       |
| 3685697     | Markham Police and Fire Lake Barrington | 12/31/2012                  | Police Station                                 | Police Station                                 | 1955       | Illinois       |

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

Current Year

Date Generated: 07/23/2015 04:14 PM EDT

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 | Property Floor Area (Building(s)) (ft <sup>2</sup> ) | National Median Reference Property Type |
|-------------|--|-----------------------------|---------------------------------------|--|------------|----------------|--|---|
| 3643864     | proviso math                           | 12/31/2011                  | K-12 School                           | K-12 School                            | 1991       | Illinois       | 226047   | CBCECS - Elementary/Middle              |
| 3644118     | Westmont Junior High School            |                             |                                       |  |            |                | 89000  | CBCECS - Elementary/Middle              |
| 3644143     | Fossil Ridge Public Library            |                             |                                       |  |            |                | 13412  | CBCECS - Library                        |
| 3644168     | Hillside Public Lib                    |                             |                                       |  |            |                | 13800  | CBCECS - Library                        |
| 3644175     | Riverside Public Library               |                             |                                       |  |            |                | 17500  | CBCECS - Library                        |
| 3644187     | Alpha Park Public Library              |                             |                                       |  |            |                | 20520  | CBCECS - Library                        |
| 3666198     | Algonqu Wastewat                       |                             |                                       |  |            |                | Not Available  | Not Available                           |
| 3670722     | Arthur Sewage Pl                       |                             |                                       |  |            |                | Not Available  | Not Available                           |
| 3670740     | Carol Stream Wat                       |                             |                                       |  |            |                | 15000  | AWWA - Wastewat Plant                   |
| 3670782     | Redama Crystal Lake Wastewat           |                             |                                       |  |            |                | 15000  | AWWA - Wastewat Plant                   |
| 3672915     | LaSalle Wastewat Treatment Plant       |                             |                                       |  |            |                | Not Available  | Not Available                           |
| 3673303     | Creve Coeur Waste Water treatment      | 7/31/2010                   | Wastewater Treatment Plant            | Not Available                          | 1984       | Illinois       | Not Available  | Not Available                           |
| 3673561     | Park District of Franklin Park Service | 10/31/2011                  | Repair Services (Vehicle, Shoe)       | Repair Services (Vehicle, Shoe)        | 1969       | Illinois       | 11050  | CBCECS - Service                        |
| 3673778     | Millennium Centre Condo                | No Current Year Ending Date | Multifamily Housing                   | Not Available                          | 2003       | Illinois       | Not Available  | Not Available                           |
| 3681538     | McMillan Pavilion - MWRD Floors 1-7    | 12/31/2011                  | Office                                | Office                                 | 1984       | Illinois       | 93000  | CBCECS - Offices & Bank/Financial       |

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

Graphs and tables in all tabs should then update automatically