



# PORTFOLIO MANAGER CUSTOM REPORTS QUICK REFERENCE GUIDE

This guide will show you how to get started with the Portfolio Manager Custom Reports tool, including basic instructions for generating a custom report, displaying report data, and controlling the data displayed in your report.

You may contact technical support at any time by clicking the **Contact Us** link located at the top of every Portfolio Manager page. The technical support team will respond to all questions within one business day.

## ABOUT PORTFOLIO MANAGER REPORTS

Portfolio Manager Reports is an interactive tool that allows you to easily extract and display data, share custom reports and templates, and graph information about your facilities and their performance. This tool will help you prioritize activities and investments, establish more robust benchmarks, report to other groups, share custom reports, and conduct comparative analysis.

Data available for reporting:

- Data for facilities that you created
- Data for facilities that other users have shared with you

Note: Data used in Portfolio Manager Reports is updated *nightly*—therefore, it will not reflect any changes you make to your account until the next day.

Data requirements:

- At least *one complete month* of data is required for a facility to show up in a report.
- *One complete year* of data is required for some metrics that calculate based on annual measures.

## KEY FEATURES

### Report Templates

Portfolio Manager Report Templates provide you with a set of related data around specific aspects of your Portfolio (e.g., Energy Performance, Emissions Performance). You can also choose to create a custom report template, which allows you to select data that is specific to your buildings and purpose. Plus, once a custom report template is created, you can share the template with other users as a means of gathering information and data.

### Create and Generate Reports

Portfolio Manager Report Templates have up to four filters, which are designed to help you select the right group of facilities for your report. The following filters are available:

- Reporting Period – You can generate reports for different reporting periods, including “single period” (one 12-month period), “comparative” (two 12-month periods), or “range” (all periods within date range). If no reporting period is selected, the default is set to “single period.”
- Facilities and Groups – You can generate reports for specific facilities or groups of facilities in your account.
- Location – You can generate reports based on where your facilities are located. This filtering can be done at the country, state, or city/zip code levels.
- Facility Type – You can generate reports for specific types of facilities in your account (e.g. offices, hotels).

The choices that are displayed for each filter are based on the facilities that are currently contained in your account (e.g. you will only be able to choose among those U.S. states in which you have facilities).

### Share Report Template

Portfolio Manager allows you to share a copy of your Custom Report Template to other individuals who use Portfolio Manager. These copies are independent of your personal copy of the Custom Report Template, therefore changes can be made without affecting your copy.

## Request Data from Others

Portfolio Manager allows you to use your Custom Report Template to collect specific data from other individuals who use Portfolio Manager. This template will remain locked once another user has accessed it. Please make sure that this template is ready to be used by other individuals before requesting data from other users.

## Table/Graph Displays

Portfolio Manager Reports, once generated, are automatically displayed in a data table. In this view, you can expand and hide columns, sort the data, and create sub-groups within the data display. Data can also be viewed as a bar or line graph.

## Exports

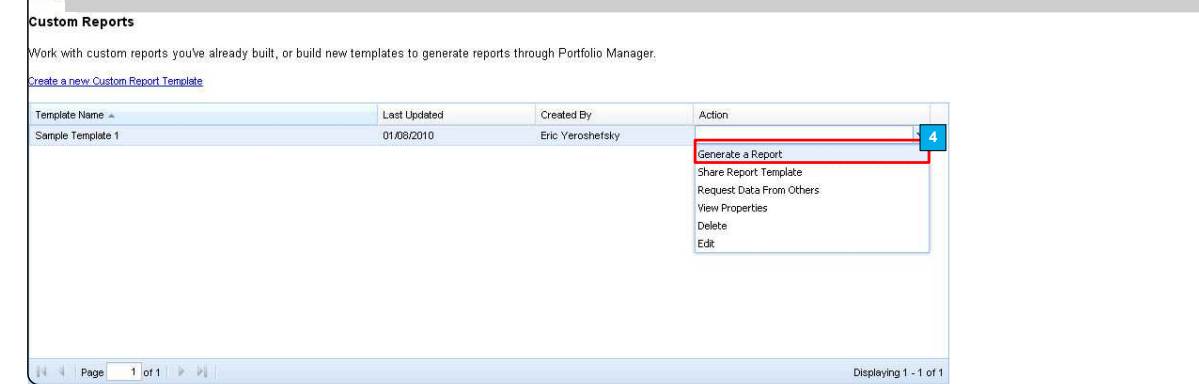
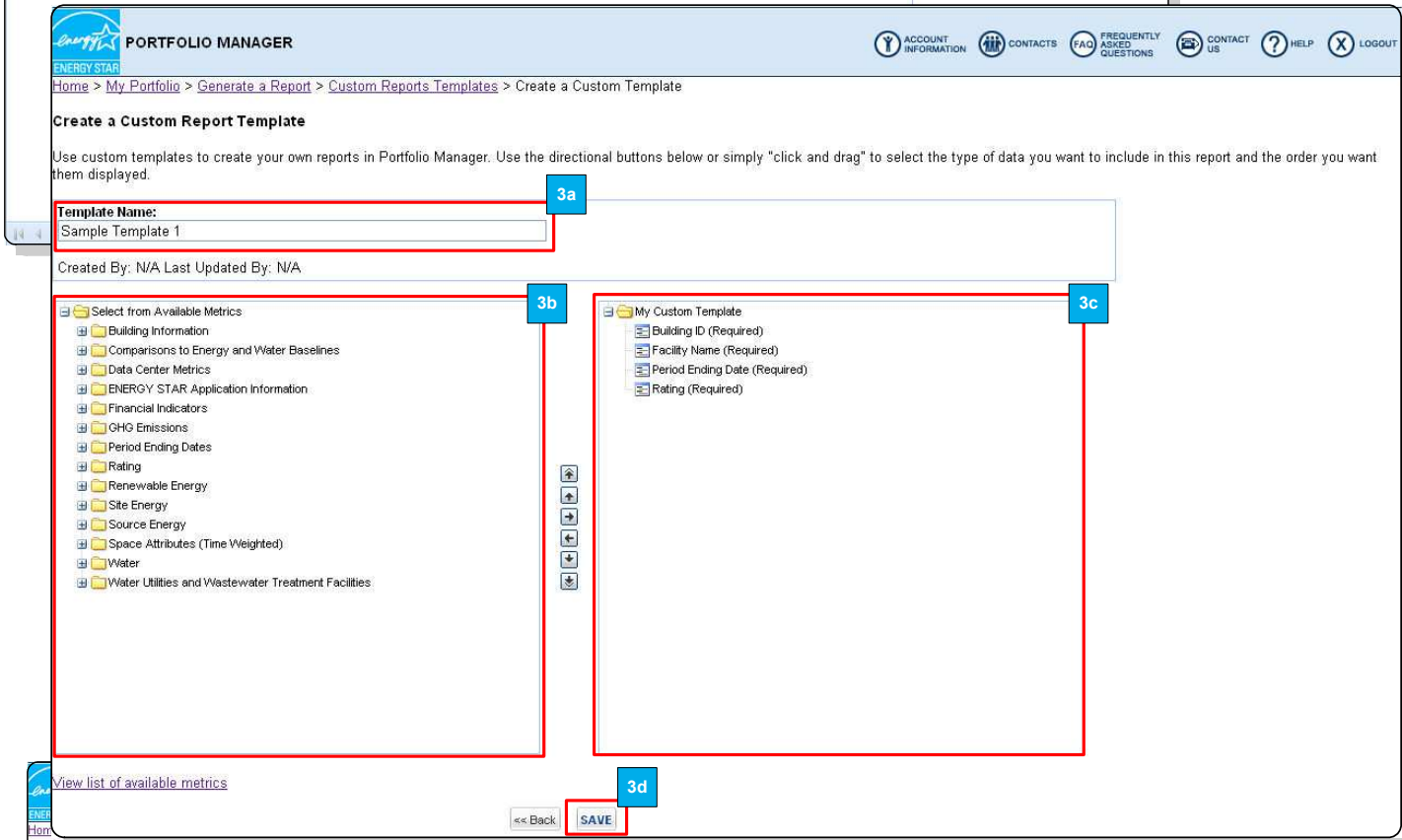
Portfolio Manager Reports allows you to instantly export your data to Excel, XML, CSV, or PDF. The “Export Data Set” links can be found on the right side of the page above the data table

# HOW TO CREATE AND GENERATE CUSTOM REPORTS

Step	Activity	Action
1	Access Portfolio Manager Reports	From the My Portfolio page, click <b>Generate Reports and Graphs</b> .
2	Choose a Type of Report	Select “Manage Custom Reports” using the drop-down menu. If you have already created a custom report, you can select the custom report.

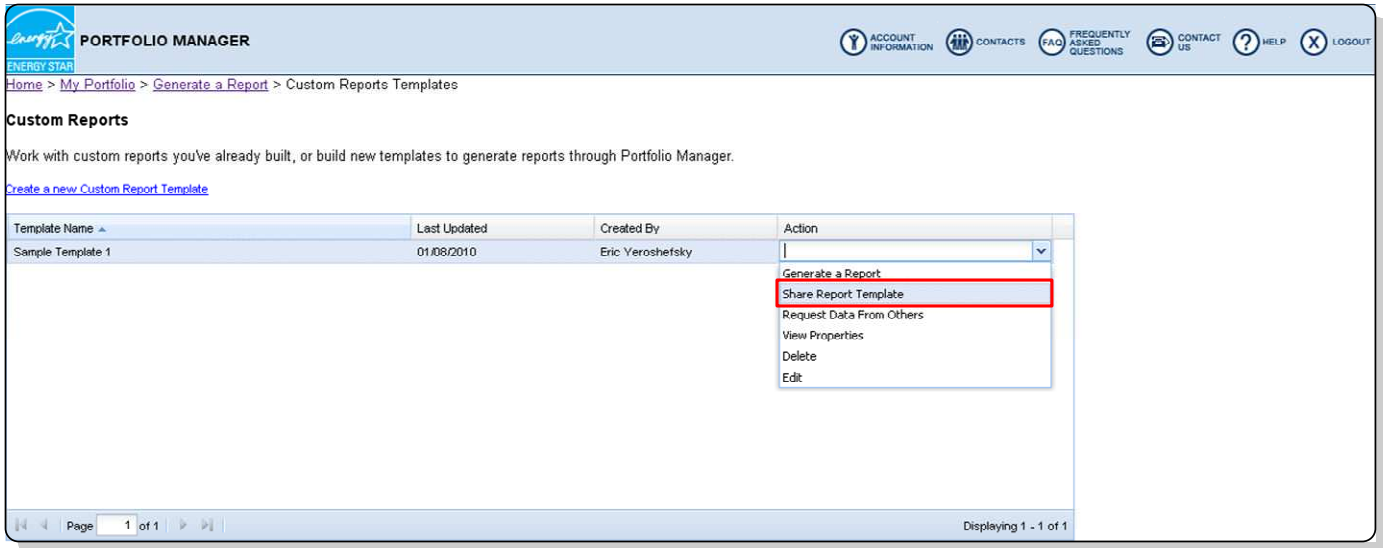
The screenshot shows the Portfolio Manager interface. The top navigation bar includes the Energy Star logo, 'PORTFOLIO MANAGER', and links for 'ACCOUNT INFORMATION' and 'CONTACTS'. The main content area displays 'Portfolio Averages' with metrics like 'Baseline Rating: 78' and 'Current Rating: 89'. A red box highlights the 'Generate Reports and Graphs' button under the 'Reporting and Analysis' section, with a blue '1' callout. Below this, a dropdown menu is open, showing various report templates. The 'Custom Reports' option is highlighted with a red box and a blue '2' callout. The bottom of the screenshot shows a banner for 'Portfolio Manager Reports' with a 'QUICK REFERENCE GUIDES' button.

Step	Activity	Action
3	Create a Custom Report Template	Select "Create a New Custom Report Template" link. Use the Custom Report Template page to create your own custom reports. <ul style="list-style-type: none"> <li>a. <b>Template Name</b> – name the report.</li> <li>b. <b>Select from Available Metrics</b> – select appropriate metrics for the custom report.</li> <li>c. <b>My Custom Template</b> – add and remove metrics from your custom template. Four metrics are required and can not be removed: Building ID, Facility Name, Period Ending Date, and Rating.</li> <li>d. Click <b>Save</b> – you will return to the Custom Report Template page. At this time, the custom report will be available.</li> </ul>
4	Generate a Report	From the "Select an Action" field, Select <b>Generate a Report</b> .
	For information on the options available when generating a report, refer to the Portfolio Manager Reports Quick Reference Guide	



# HOW TO SHARE A REPORT TEMPLATE

Step	Activity	Action
1	Access Portfolio Manager Reports, Choose a Type of Report and Create a Custom Report Template	Follow steps 1-2 of the HOW TO CREATE AND GENERATE CUSTOM REPORTS section above.
2	Share Report Template	<p>From the “Select an Action” field, select Share Report Template</p> <p>Share a copy of your Custom Report Template with other individuals who use Portfolio Manager. Since this copy is independent of your copy, changes can be made to the template without affecting the original.</p> <ol style="list-style-type: none"> <li>Enter email addresses, separated by a semi-colon</li> <li>Click Done</li> </ol>



# HOW TO REQUEST DATA FROM OTHERS

Step	Activity	Action
1	Access Portfolio Manager Reports, Choose a Type of Report and Create a Custom Report Template	Follow steps 1-3 of the HOW TO CREATE AND GENERATE CUSTOM REPORTS section above.
2	Select Action	From the “Select an Action” field, select <b>Request Data from Others</b> .
3	Request Data	<p>Use your Custom Report Template to collect this specific data from other individuals who use Portfolio Manager. Please note: Your Custom Report Template will remain locked once another user has accessed it.</p> <ol style="list-style-type: none"> <li>Specify the reporting period for the data you are requesting (optional)</li> <li>Enter the name of the appropriate contact person</li> <li>Provide instructions, especially about your required date range and reporting deadline (optional)</li> <li>Click <b>Save &amp; Continue</b></li> <li>Copy and Paste the text into an email to be sent to other users.</li> </ol> <p>Please note: once you have sent a Custom Report Template, you are no longer able to <b>edit</b> the Custom Report Template or <b>Request Data from Others</b>.</p>

**ENERGY STAR PORTFOLIO MANAGER**

ACCOUNT INFORMATION CONTACTS FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Generate a Report > Custom Reports Templates

### Custom Reports

Work with custom reports you've already built, or build new templates to generate reports through Portfolio Manager.

[Create a new Custom Report Template](#)

Template Name	Last Updated	Created By	Action
Sample Template 1	01/08/2010	Eric Yeroshefsky	<ul style="list-style-type: none"> <li>Generate a Report</li> <li>Share Report Template</li> <li><b>Request Data From Others</b></li> <li>View Properties</li> <li>Delete</li> <li>Edit</li> </ul>

**ENERGY STAR PORTFOLIO MANAGER**

ACCOUNT INFORMATION CONTACTS FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Generate a Report > Custom Reports Templates > Request Data from Another User

### Request Data from Another User

Here you can use your Custom Report Template to collect data from other Portfolio Manager users. **Please note: Once you complete this step, your Custom Report Template will be locked and you will not be able to make any changes!**

#### Step 1: Verify the Data You Are Requesting

- Building ID (Required)
- Facility Name (Required)
- Period Ending Date (Required)
- Rating (Required)

If correct, continue to Step 2.  
If wrong, [go back and edit Custom Report Template](#).

#### Step 2: Specify the Reporting Period for the Data You Are Requesting (Optional)

If you would like to request data for a specific 12 Month Reporting Period, please specify below. Users that you send the template to will not be able to change the Reporting Period if you specify it here.

No Specific Period Required  
 Single Period (one period)  
 Comparative (two period)  
 Range (all periods within a date range)

#### Step 3: Identify Appropriate Contact Person

This person will be the main point of contact for users who have questions about your request. (Any edits you make here will NOT affect your main account information.)

**\*REQUIRED**

\*First Name: Test  
 \*Last Name: Person  
 \*Organization: Sample Organization  
 \*Email Address: testperson@energystar.gov  
 \*Phone: 555-555-555

#### Step 4: Provide Detailed Instructions for Users of Your Custom Report Template

These instructions will be visible to people using your template. They will also be included in sample text (available on the next page) that you may choose to email or post to a website. Be sure to include details such as:

- Required date ranges for data
- Submission deadline

Tahoma

Back Preview Instructions **SAVE & CONTINUE**

**PORTFOLIO MANAGER**

Home > My Portfolio > Generate a Report > Custom Reports Templates > Instructions for Accessing this Report

### Instructions for Accessing this Report

Individuals who access this report template will be required to follow a few steps before they can use it. The following text is provided to you so that you can customize it and pass it along to them when sharing the URL to this report template.

**Sample Text You Can Use To Request Data**  
Copy and paste the text below to make your data requests. You can either paste this into an email, letter, or flyer, or post it to a website.

**Test Person** of Sample Organization has requested a report of your buildings' energy use data. Please report this data using EPA's ENERGY STAR Portfolio Manager tool ([Learn more about Portfolio Manager](#)). A report template called "**Sample Template 1**" has been created for this purpose and is available at the following link. The new template will be saved within your account and you can access it at any time.

<https://estest.sra.com/istar/pmpam/index.cfm?fuseaction=login.loginExtRpt&reportuid=0F42CF9F-AE93-603C-90D2FFBD41DC39E&permtyp=REQ>

**New to Portfolio Manager?**  
The above link will take you to a page where you can register as a new user. Once your account is set up, we recommend that you refer to a [Quick Reference Guide](#) or watch a 26-minute [EPA training session](#) to learn how to enter your building's energy use data into the tool. Once you have your building data entered, then you can open "Sample Template 1" and use it to report your data.

**How to Access "Sample Template 1" at Any Time:**  
Option 1: Click on the link above to go directly to the template  
Option 2:  
1. Go to <https://www.energystar.gov/istar/pmpam/>  
2. Log in to your account  
3. Click on "Access My Portfolio"  
4. From the list on the right, select "Generate Reports and Graphs"  
5. From the drop-down menu, select "Sample Template 1"

Questions? Contact Test Person at [testperson@energystar.gov](mailto:testperson@energystar.gov) or 555-555-5555.

<< Back    DONE

3e

**Request Data from Another User**

ⓘ This template will remain locked once you click "Yes". Please make sure that this template is ready to be used by other individuals before requesting data. If you would like to view the instructions before continuing, then please click "No" and then click "Preview Instructions".

Yes    No

# HOW TO EDIT DATA REQUEST INSTRUCTIONS

Step	Activity	Action
1	Access Portfolio Manager Reports, Choose a Type of Report and Create a Custom Report Template	Follow steps 1-3 of the HOW TO REQUEST DATA FROM OTHERS section above.
2	Select Action	From the "Select an Action" field, select <b>Edit Data Request Instructions</b>
3	Edit Data Request Instructions	Edit the instructions for your data request. <ol style="list-style-type: none"> <li>Edit the information of the appropriate contact person</li> <li>Edit the detailed instructions for users of your custom report template</li> <li>Click <b>Save &amp; Continue</b></li> <li>Copy and Paste the text into an email to be sent to other users.</li> </ol>

**PORTFOLIO MANAGER**

Home > My Portfolio > Generate a Report > Custom Reports Templates

### Custom Reports

Work with custom reports you've already built, or build new templates to generate reports through Portfolio Manager.

[Create a new Custom Report Template](#)

Template Name	Last Updated	Created By	Action
Sample Template 1 (Data Request Master)	09/08/2010	Eric Yeroshetsky	Generate a Report Share Report Template <b>View Data Request Instructions (including URL)</b> 2 <b>Edit Data Request Instructions</b> View Properties Delete

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**PORTFOLIO MANAGER** ACCOUNT INFORMATION CONTACTS FAQ FREQUENTLY ASKED QUESTIONS CONTACT US HELP LOGOUT

Home > My Portfolio > Generate a Report > Custom Reports Templates > Edit Data Request Instructions

### Edit Data Request Instructions

#### Edit contact Person

This person will be the main point of contact for users who have questions about your request. (Any edits you make here will NOT affect your main account information.)

**REQUIRED**

\*First Name: Test **3a**

\*Last Name: Person

\*Organization: Sample Organization

\*Email Address: testperson@energystar.gov

\*Phone: 555-555-5555

#### Edit Detailed Instructions for Users of Your Custom Report Template

These instructions will be visible to people using your template. They will also be included in sample text (available on the next page) that you may choose to email or post to a website. Be sure to include details such as:

- Required date ranges for data
- Submission deadline

Tahoma **3b**

**3c**

<< Back Preview Instructions **SAVE & CONTINUE**

## HOW TO SUBMIT (“RELEASE”) DATA TO THE DATA REQUESTER

Step	Activity	Action
1	Open Custom Report Template	From the drop-down list of report templates, choose the template that has been shared with you for the purpose of reporting your data
2	Populate template	Use the filters on the left to populate the reporting template with the required data
3	Release Data to User	<p>If you want to provide a copy of your data, you can release the data to another user. If you have released the data to the same user using the same Report Template, you will overwrite the previously submitted data.</p> <ol style="list-style-type: none"> <li>Click the <b>Release Data</b> button on the <b>Generate a Report</b> page</li> <li>Provide your Name, Organization, Email address, and Phone.</li> <li>Click <b>Release</b></li> <li><b>Release Confirmation</b> – you will be directed to a confirmation page.</li> <li>From the confirmation page, you can choose to send a confirmation email, along with a copy of the data released, to yourself or another party (Optional). Click <b>Send Email</b></li> <li>Click <b>Done</b> – you will be directed back to the <b>Generate a Report</b> page</li> </ol>

PORTFOLIO MANAGER

Home > My Portfolio > Generate a Report

Quick Reference Guide

Data Current As Of: January 8, 2010 12:00AM

Report Template: Sample Template 1 (Data Request Master) [1]

View data released to this template | View Data Table [2] | View Graph

RELEASE DATA [3a]

9 Matching Facilities 9 Rows Returned

Building ID	Facility Name	Period Ending Date	Rating
1866370	Training Building 1	07/31/2009	1
1863390	Training Building 10	07/31/2009	N/A
1866328	Training Building 2	07/31/2009	85
1866337	Training Building 3	07/31/2009	100
1866362	Training Building 4	07/31/2009	97
1866365	Training Building 5	07/31/2009	N/A
1866372	Training Building 6	07/31/2009	85
1866377	Training Building 7	07/31/2009	82
1866383	Training Building 8	07/31/2009	66

PORTFOLIO MANAGER

Home > My Portfolio > Generate a Report > Custom Reports Templates > Data Release Confirmation

**Data Release Confirmation**

You are about to release a copy of this data to Test Person. If you have previously released data to using this same report template, you will overwrite that previous data.

**Your Contact Information**  
This allows Test Person to know who to contact in case of questions about this data.

**REQUIRED**

\*First Name: Sample [3b]  
 \*Last Name: Person  
 \*Organization: Test Organization  
 \*Email Address: sampleperson@energystar.gov  
 \*Phone: 123-456-7890

CANCEL RELEASE [3c]

## HOW TO DELETE OR EDIT CUSTOM REPORT TEMPLATES

Option	Activity	Action
1	Access Portfolio Manager Reports, Choose a Type of Report and Create a Custom Report Template	Follow steps 1-2 of the HOW TO CREATE AND GENERATE CUSTOM REPORTS section above.
2	Delete or Edit [Custom Report Template]	<p>From the "Select an Action" field, select <b>Delete</b> or <b>Edit</b>.</p> <ol style="list-style-type: none"> <li><b>Delete</b> a Custom Report Template: If needed, you can delete a copy of your custom report. However, you will no longer be able to access the template once it has been deleted.             <ol style="list-style-type: none"> <li>Click Yes, Delete</li> </ol> </li> <li><b>Edit</b> a Custom Report Template: If edits are needed, you can add and remove metrics from your custom template. Four metrics are required and cannot be removed: Building ID, Facility Name, Period Ending Date, and Rating.</li> </ol> <p>Please note: once a user (data request master) has requested data from others, they will not be able to edit the template.</p>



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