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

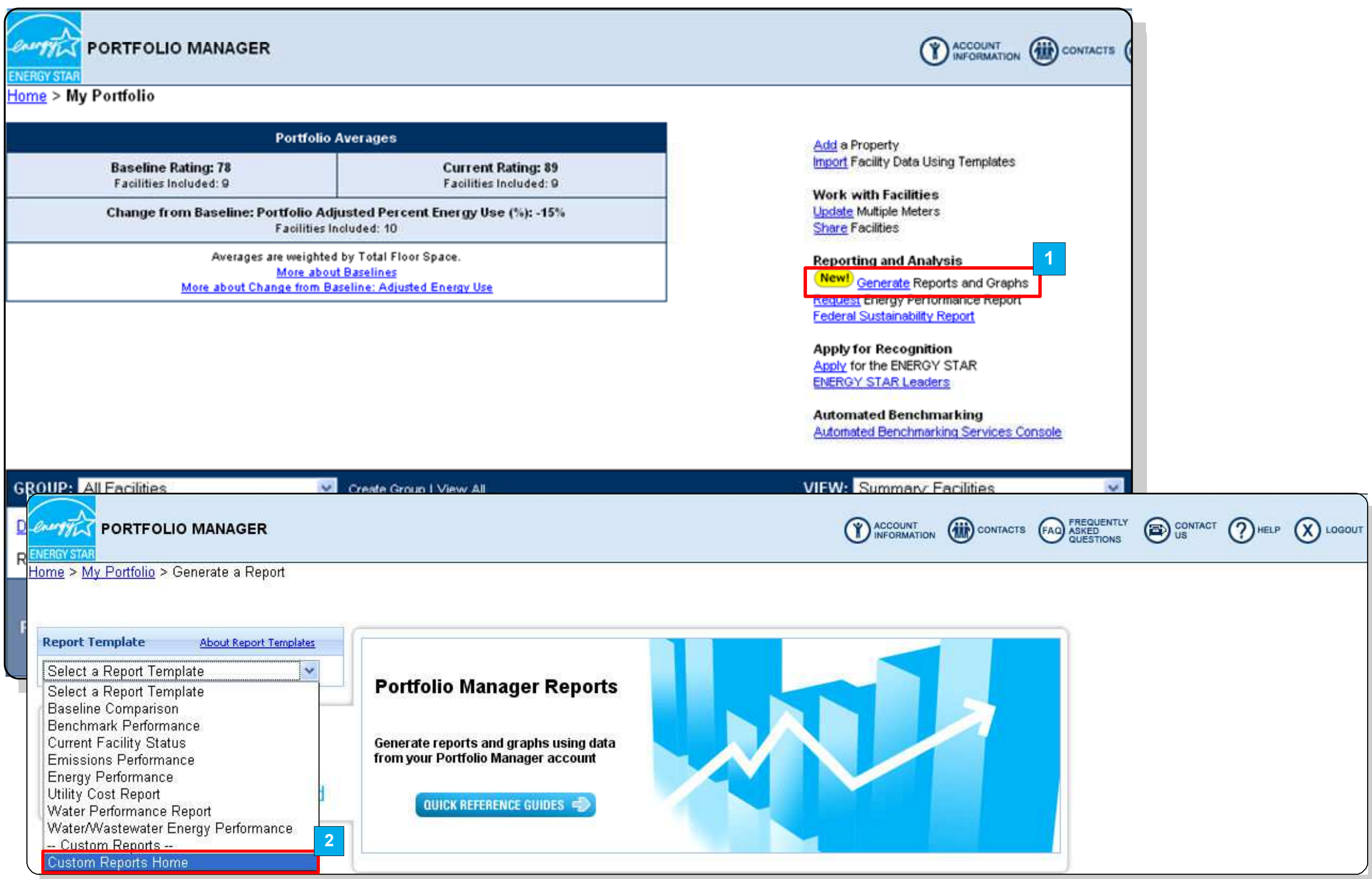
Portfolio Manager Reports, once generated, are automatically displayed in a data table. In this view, you can expand and hide columns, sort the data, and create sub-groups within the data display. Data can also be viewed as a bar or line graph.

Exports

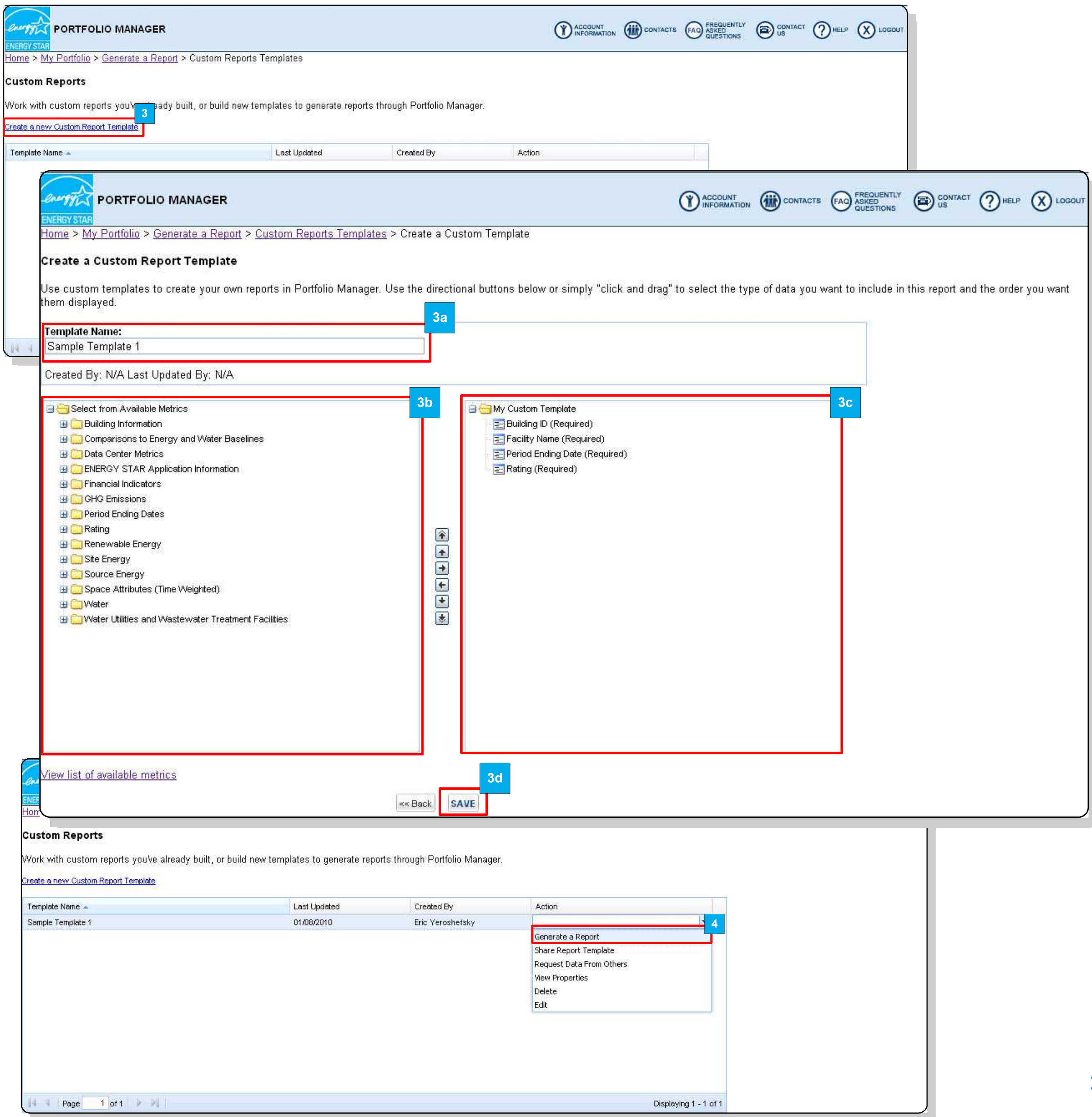
Portfolio Manager Reports allows you to instantly export your data to Excel, XML, CSV, or PDF. The "Export Data Set" links can be found on the right side of the page above the data table

HOW TO CREATE AND GENERATE CUSTOM REPORTS

Step	Activity	Action
1	Access Portfolio Manager Reports	From the My Portfolio page, click **Generate Reports and Graphs.**
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.



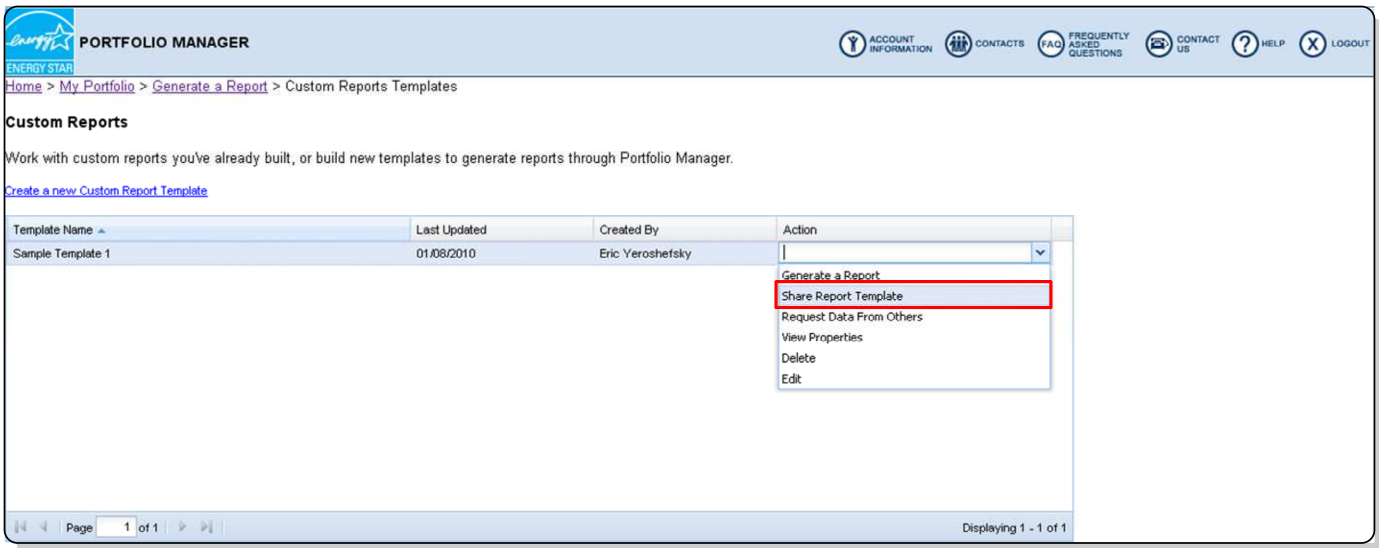
Step	Activity	Action
3	Create a Custom Report Template	Select "Create a New Custom Report Template" link. Use the Custom Report Template page to create your own custom reports. a. **Template Name** – name the report. b. **Select from Available Metrics** – select appropriate metrics for the custom report. c. **My Custom Template** – 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. d. Click **Save** – you will return to the Custom Report Template page. At this time, the custom report will be available.
4	Generate a Report	From the "Select an Action" field, Select **Generate a Report**.
	For information on the options available when generating a report, refer to the Portfolio Manager Reports Quick Reference Guide	



www.energystar.gov/benchmark

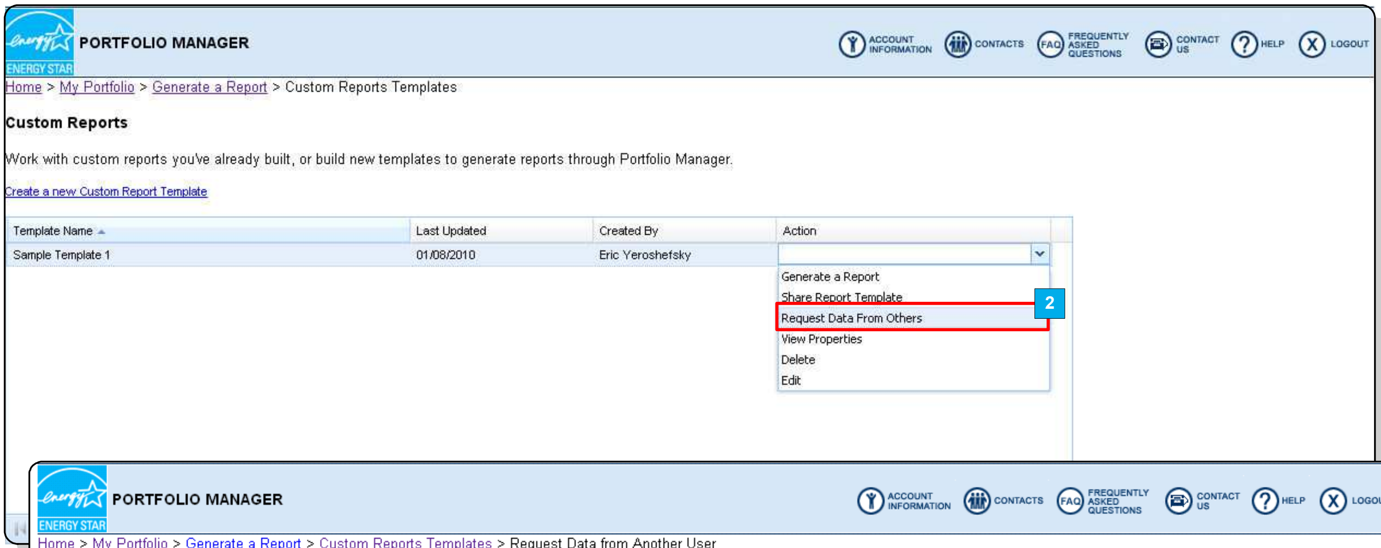
HOW TO SHARE A REPORT TEMPLATE

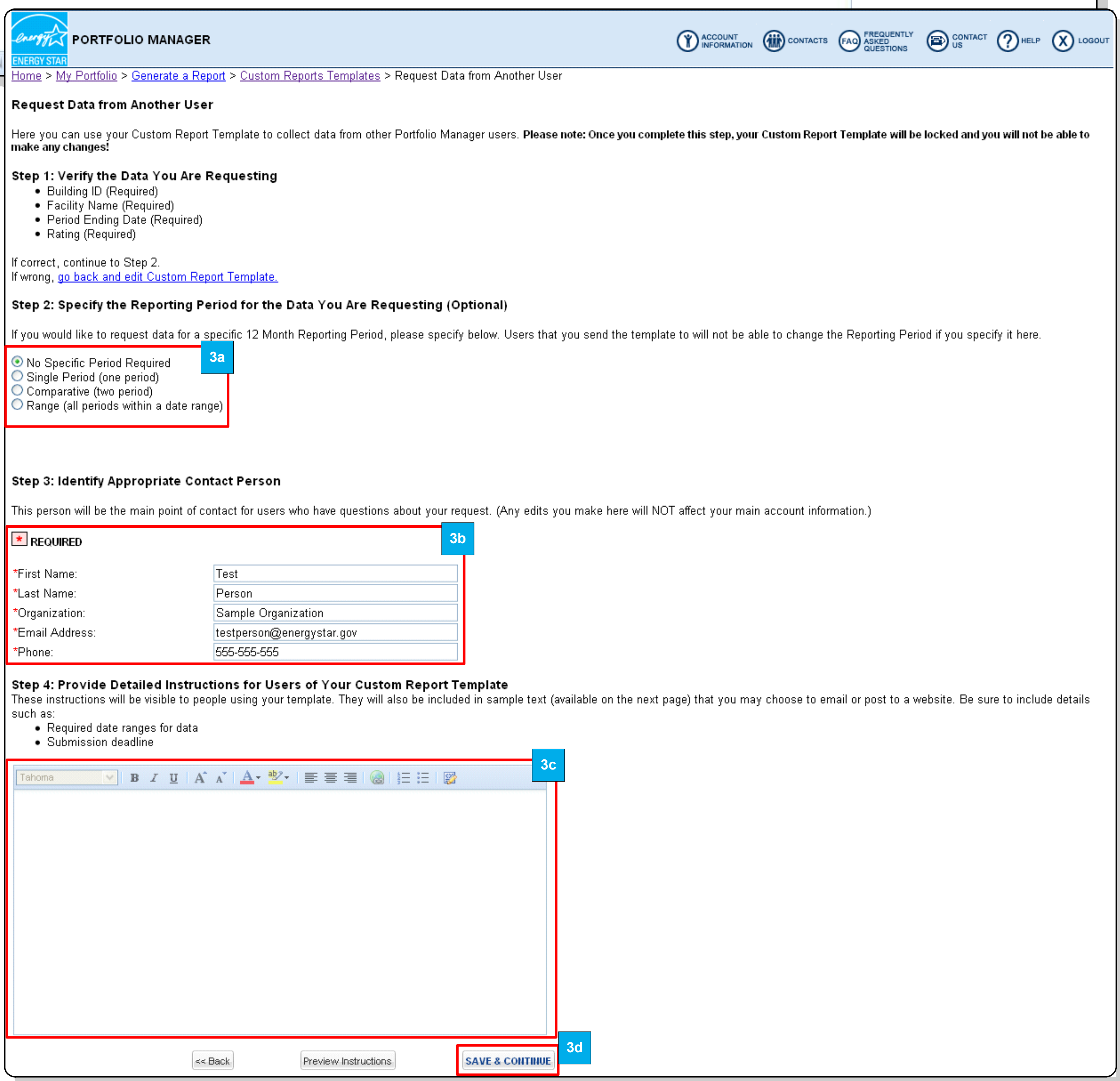
Step	Activity	Action
1	Access Portfolio Manager Reports, Choose a Type of Report and Create a Custom Report Template	Follow steps 1-2 of the HOW TO CREATE AND GENERATE CUSTOM REPORTS section above.
2	Share Report Template	From the “Select an Action” field, select Share Report Template Share a copy of 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. a. Enter email addresses, separated by a semi-colon b. Click Done



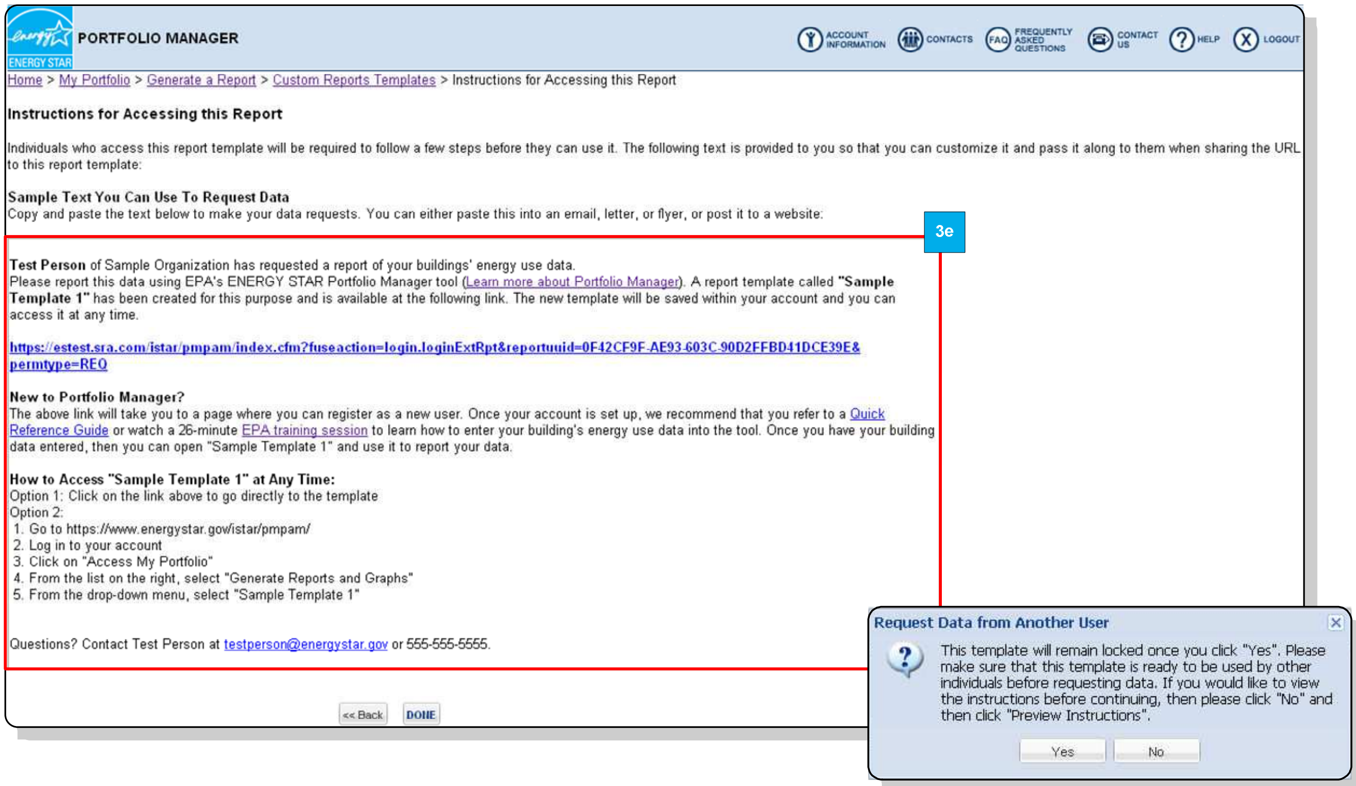
HOW TO REQUEST DATA FROM OTHERS

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 **Request Data from Others**.
3	Request Data	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. a. Specify the reporting period for the data you are requesting (optional) b. Enter the name of the appropriate contact person c. Provide instructions, especially about your required date range and reporting deadline (optional) d. Click **Save & Continue** e. Copy and Paste the text into an email to be sent to other users. Please note: once you have sent a Custom Report Template, you are no longer able to **edit** the Custom Report Template or **Request Data from Others**.



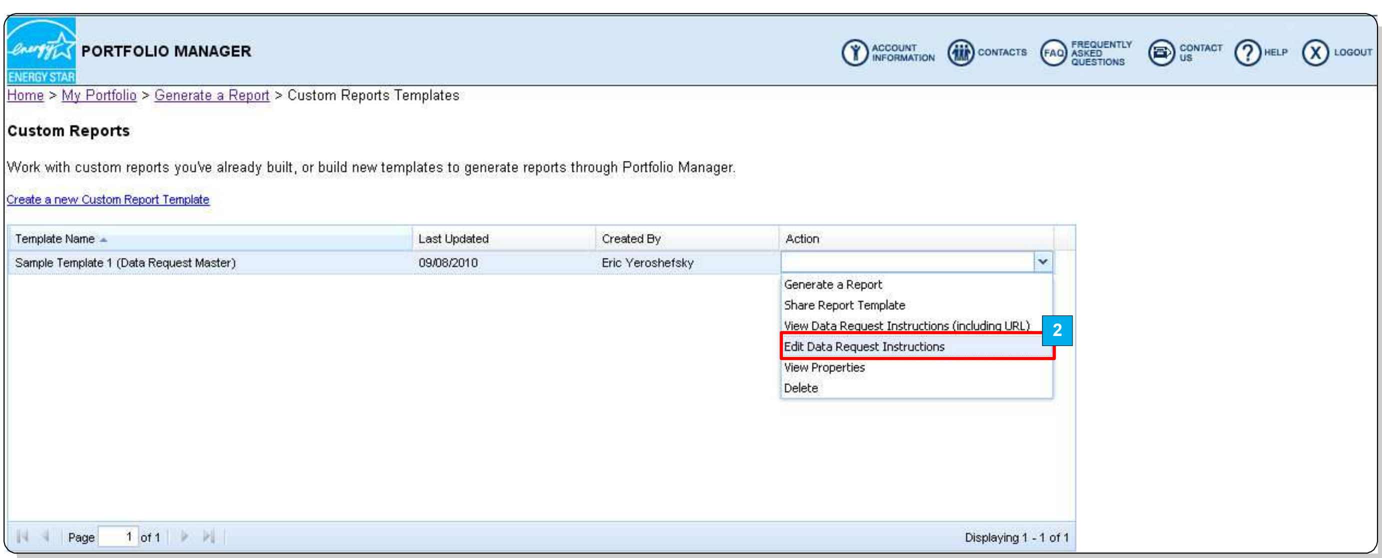


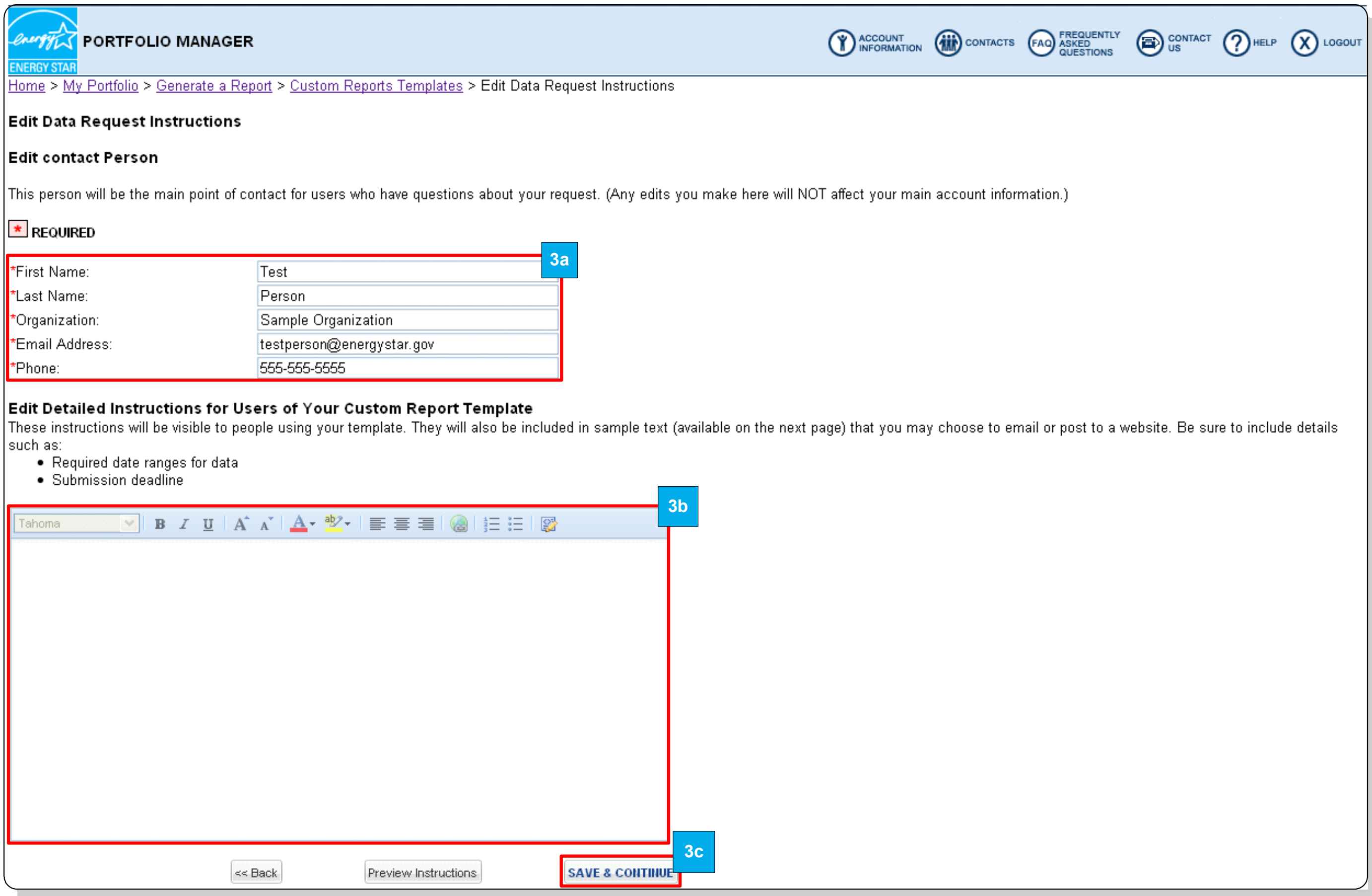
www.energystar.gov/benchmark



HOW TO EDIT DATA REQUEST INSTRUCTIONS

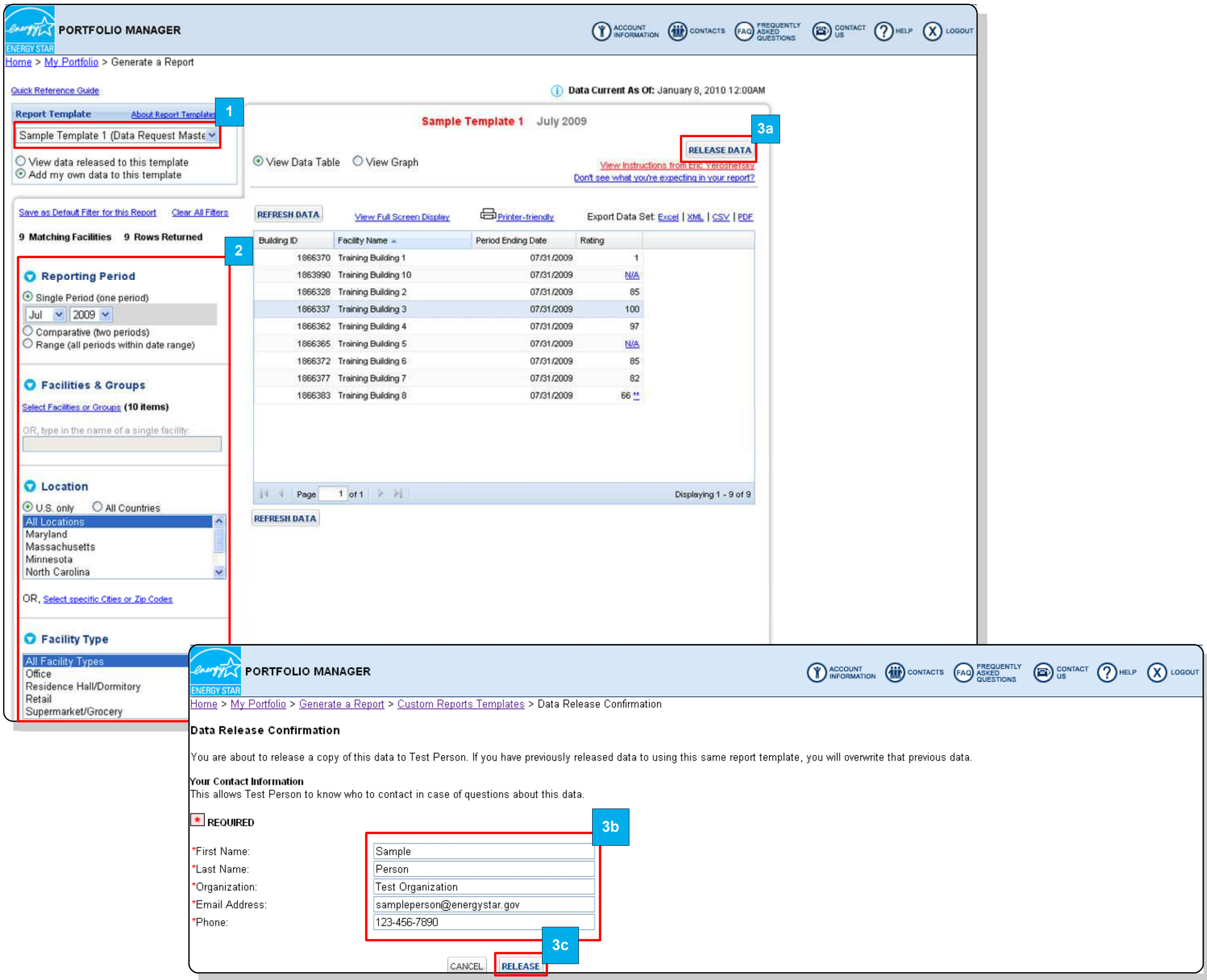
Step	Activity	Action
1	Access Portfolio Manager Reports, Choose a Type of Report and Create a Custom Report Template	Follow steps 1-3 of the HOW TO REQUEST DATA FROM OTHERS section above.
2	Select Action	From the "Select an Action" field, select **Edit Data Request Instructions**
3	Edit Data Request Instructions	Edit the instructions for your data request. a. Edit the information of the appropriate contact person b. Edit the detailed instructions for users of your custom report template c. Click **Save & Continue** d. Copy and Paste the text into an email to be sent to other users.





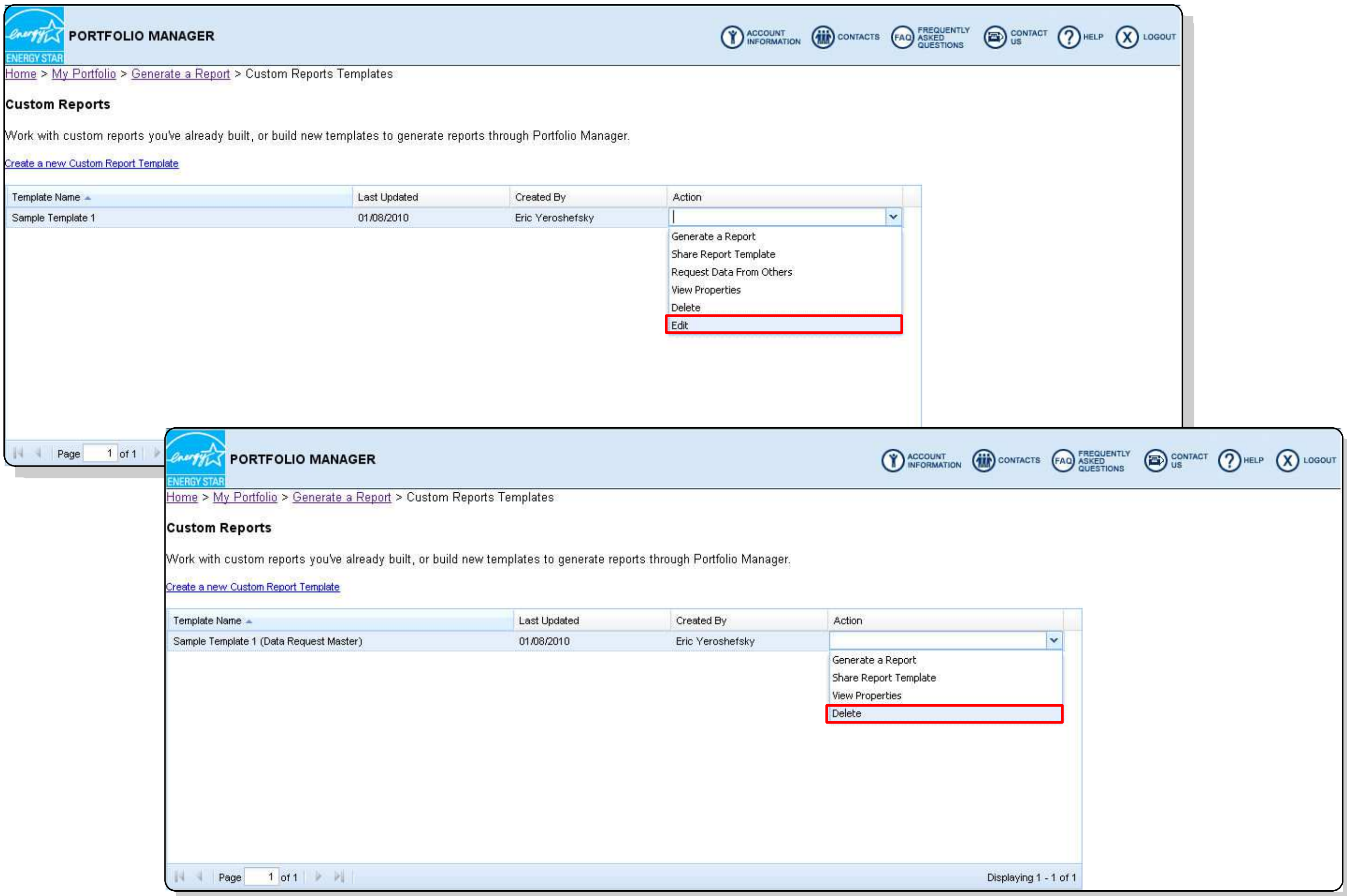
HOW TO SUBMIT ("RELEASE") DATA TO THE DATA REQUESTER

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	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. a. Click the **Release Data** button on the **Generate a Report** page b. Provide your Name, Organization, Email address, and Phone. c. Click **Release** d. **Release Confirmation** – you will be directed to a confirmation page. e. 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 **Send Email** f. Click **Done** – you will be directed back to the **Generate a Report** page



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]	From the “Select an Action” field, select **Delete** or **Edit**. a. **Delete** 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. i. Click Yes, Delete b. **Edit** 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. Please note: once a user (data request master) has requested data from others, they will not be able to edit the template.


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
Generate a Report
Share Report Template
Request Data From Others
View Properties
Delete
Edit
Page 1 of 1
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 (Data Request Master)
01/08/2010
Eric Yeroshefsky
Generate a Report
Share Report Template
View Properties
Delete
Page 1 of 1
Displaying 1 - 1 of 1