



PORTFOLIO MANAGER REPORTS QUICK REFERENCE GUIDE

This guide will show you how to get started with Portfolio Manager Reports, basic instructions for generating a 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 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, and conduct comparative analysis.

Data available for reporting:

- Use data for facilities that you created *or* facilities that other users have shared with you.
- 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 select from eight different pre-defined report templates, including: Baseline Comparison, Benchmark Performance, Current Facility Status, Emissions Performance, Energy Performance, Utility Cost Report, Water Performance Report, and Water/Wastewater Energy Performance.

Filters and Pop-up Filters

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 U.S. states in which you have facilities).

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 GENERATE A PORTFOLIO MANAGER REPORT

You can generate a report by following these simple steps. Refer to the figures on the next page as you read through each step.

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 a Report Template using the drop-down menu.
3	Define a Reporting Period	<p>From the Filters Menu on the left side of the page, under the first filter, Reporting Period, click on one of the 3 radio buttons to choose the desired report timeframe.</p> <ul style="list-style-type: none"> ▪ Single period – Use the drop down menus to select a month and year as the 12-month period ending date for your report. ▪ Comparative – Use the drop down menus to select two 12-month periods to compare (select a month and year for each period). ▪ Range - Use the drop down menus to select a beginning period and an ending period (select a month and year for each period). Your report will show data for all months in between.
	Note: Not required for the “Current Facility Status” report, which uses only the current period.	
4	Further Define Your Search	<p>From the Filters Menu, under Facilities & Groups (4a)</p> <ul style="list-style-type: none"> ▪ Option 1: Click Select Facilities or Groups to open a pop-up window with a list of all of the facilities and groups in your portfolio. Use the boxes to make your selections and click Save when complete. ▪ Option 2: Type all of part of the name of a facility in your portfolio into the text box. <p>From the Filters Menu, under Location (4b)</p> <ul style="list-style-type: none"> ▪ Option 1: Select one or more states from the list provided by clicking on the state name (hold down the Ctrl key and click to make multiple selections). ▪ Option 2: Click Select Specific Cities or Zip Codes to open a pop-up window with a list of all of the cities in your portfolio. Use the boxes to make your selections and click Save when complete. You may also click the Select Zip Codes tab within the same window to make your selections by zip code. <p>From the Filters Menu, under Facility Type (4c)</p> <ul style="list-style-type: none"> ▪ Select one or more facility types from the list provided by clicking on the name of the facility type (hold down the Ctrl key and click to make multiple selections).
5	Generate Your Report	Click the Refresh Data button.
6	Save Your Filters (Optional)	On the left side of the page, at the top of the Filters Menu , click Save as Default Filter for This Report to save the filters you’ve selected as the defaults for that particular report template. A pop-up window is displayed indicating that the defaults have been saved. Hit OK .
7	Export Your Report (Optional)	Just above the data table, on the right side, after Export Data Set , click on the link for the file type you would like to export. Four types are available: Excel , XML , CSV , or PDF . A window will open allowing you to open or save the file to your computer.

PORTFOLIO MANAGER

Home > My Portfolio

Portfolio Averages

Baseline Rating: 75 <small>Facilities Included: 0</small>	Current Rating: 75 <small>Facilities Included: 0</small>
Change from Baseline: Portfolio Adjusted Percent Energy Use (Up/%) <small>Facilities Included: 10</small>	
Averages are weighted by Total Floor Space. More about Baseline More about Change from Baseline Adjusted Energy Use	

[Add a Property](#)
[View Facility Data Using Templates](#)

Work with Facilities
[Update Multiple Meters](#)
[Share Facilities](#)

Reporting and Analysis
1 [Generate Reports and Graphs](#)

Apply for Recognition
[Apply for the ENERGY STAR ENERGY STAR Leaders](#)

Automated Benchmarking
[Automated Benchmarking Services Overview](#)

GROUP: All Facilities | GROUP: Group | View: All | VIEW: Summary Energy Use | GROUP: View | Edit View | View: All

Download in Excel | Search Facility Name: [] | Search

Results 1 - 10 of 10 | All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Facility Name	Current Rating (1-100)	Current Energy Period Ending Date	Current Site Energy Intensity (kBtu/Sq. Ft.)	Current Source Energy Intensity (kBtu/Sq. Ft.)	Change from Baseline Energy Use Intensity (kBtu/Sq. Ft.)	Change from Baseline Adjusted Energy Use Intensity (kBtu/Sq. Ft.)	Energy Use Alerts
Training Building 1	91	07/31/2009	15.1	38.9	15.0	38.9	
Training Building 10	NA	08/31/2009	281.5	281.5	281.5	281.5	
Training Building 2	85	08/31/2009	4				
Training Building 3	100	07/31/2009	5				
Training Building 4	97	08/31/2009	4				

PORTFOLIO MANAGER

Home > My Portfolio > Generate a Report

Report Template [About Report Templates](#)

- Select a Report Template
- Select a Report Template
- Baseline Comparison
- Benchmark Performance
- Current Facility Status
- Emissions Performance
- Energy Performance
- Utility Cost Report
- Water Performance Report
- Water/Wastewater Energy Performance

Portfolio Manager Reports

Generate reports and graphs using data from your Portfolio Manager account

[View Reference Guide](#)

PORTFOLIO MANAGER

Home > My Portfolio > Generate a Report

Quick Reference Guide | Data Current As Of: October 2, 2009 12:00AM

Benchmark Performance

View Data Table | View Graph | [Don't see what you're expecting in your report?](#)

Report Template: [About Report Templates](#)
Benchmark Performance

6 [Save as Default Filter for this Report](#) | [All Filters](#)

0 Matching Facilities | 0 Rows Returned

5 **REFRESH DATA** | [View Full Screen Display](#) | [Printer-friendly](#) | **7** Export Data Set: [Excel](#) | [HTML](#) | [CSV](#) | [PDF](#)

3 Reporting Period

Single Period (one period)

Comparative (two periods)

Range (all periods within date range)

4a Facilities & Groups

Select Facilities or Groups

OR, type in the name of a single facility:

4b Location

U.S. only | All Countries

- All Locations
- Maryland
- Massachusetts
- Minnesota
- North Carolina

OR, select specific Cities or Zip Codes

4c Facility Type

- All Facility Types
- Office
- Residence Hall/Dormitory
- Retail
- Supermarket/Grocery

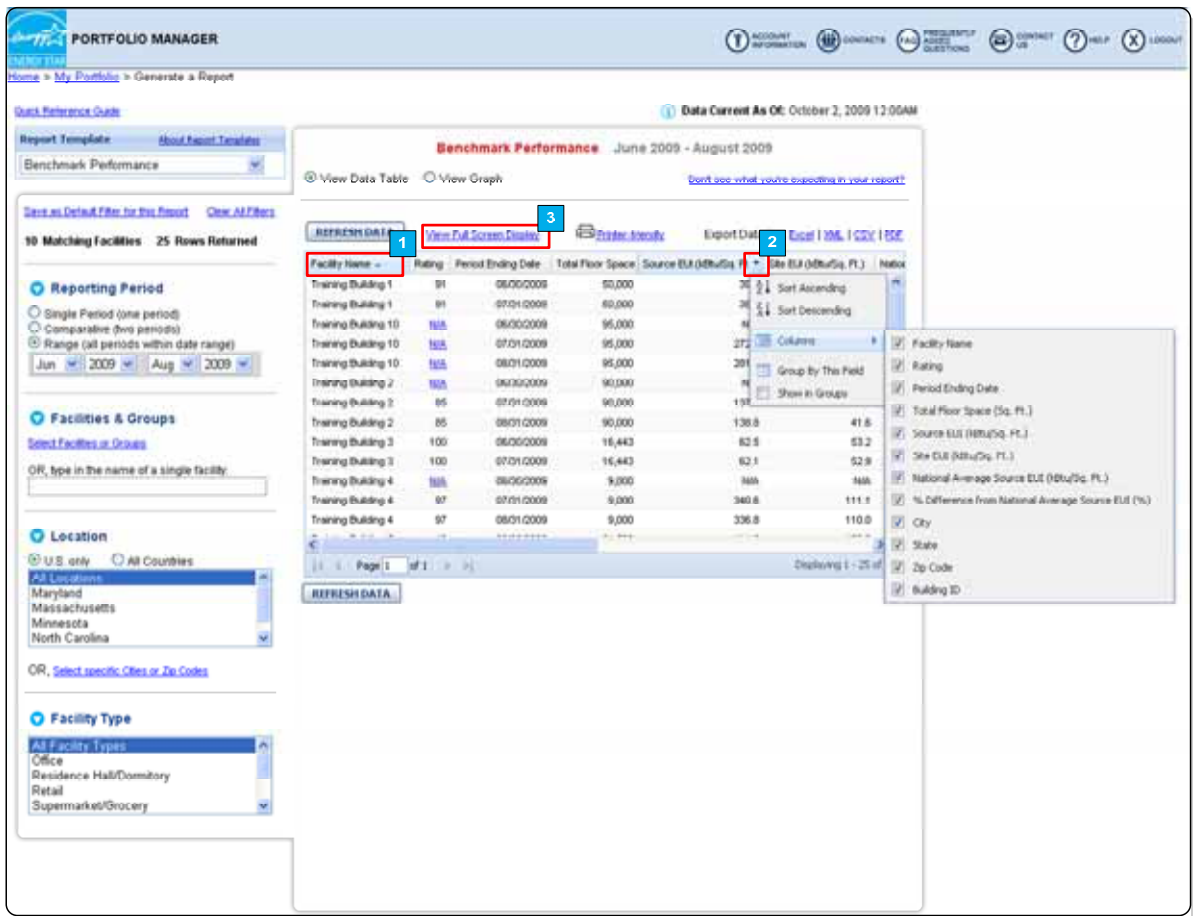
Facility Name	Rating	Period Ending On	Total Floor Spec.	Site EUI (kBtu/Sq. Ft.)	Source EUI (kBtu/Sq. Ft.)	National Average % Diff
No facilities to display						

5 **REFRESH DATA**

HOW TO MODIFY YOUR DATA TABLE

In the Data Table View, you can expand and hide columns, sort the data, select specific data, and create sub-groups within the data display.

Option	Activity	Action
1	Perform a Quick Data Sort	Within the data table, click on any column name to sort the data table by that category.
2	Reorganize Your Data	Hold the cursor over any column name and click on the arrow that appears to the right of the name. A drop down menu will appear with the following options: <ul style="list-style-type: none"> Sort Ascending Sort Descending Columns (use the check boxes to select or deselect columns for display) Group by This Field (this option groups the entries by values present in that column) Show in Groups (this option groups the entries by values present in that column and if already grouped, can be unchecked to return to the default view.)
3	Expand the Size of the Data Table	Just above the data table, to the right of the Refresh Data button, click View Full Screen Display to view the data table in a new window. Closing this new window will return you to the main screen.



HOW TO VIEW A GRAPH

The Graph View will let you create a custom bar or line graph for export and printing.

Step	Activity	Action
1	Switch to Graph View	Under the title of the report (in red), select the View Graph radio button. A bar graph is initially displayed showing the "Average Rating for all Facilities Selected" for the specified time period(s).
2	Customize the Graph	<p>Directly above the graph, click on the Change Graph Settings button (2a).</p> <ul style="list-style-type: none"> Use the drop-down menu in the blue box to select a bar or line graph (2b). Below, under Y-Axis, use the drop-down menu to specify the metric you would like to see on the y-axis (2c). After selecting a metric, you may be given the option to select additional metrics for display that have the same units. (The x-axis cannot be changed.) On the right side of the page, under Select Dataset, choose either: <ul style="list-style-type: none"> Average for All Facilities Selected to display average values for the facilities in your report (2d). Individual Facilities to display values for individual facilities. (Hold down the Ctrl key and click to make multiple selections) (2e). <p>In the area above the blue box, click on Re-Draw Graph (2f).</p> <p><i>(Note: Trying to plot too many facilities or adding too many Y-axis data points to a single graph may result in an unreadable graph.)</i></p>
3	Expand the Size of the Graph	Above the graph, click View Full Screen Display to view the graph in a new window.
4	Print Your Graph	Above the graph on the right-hand side, click Download Graph (printable PDF) to open a PDF file which you may print or save to your computer.

The image contains two screenshots of the Portfolio Manager interface, illustrating the steps to view a graph. The top screenshot shows the 'View Graph' button (1) and the 'Change Graph Settings' button (2a). The bottom screenshot shows the 'Graph Chart Type' dropdown (2b), the 'Y Axis' dropdown (2c), the 'Select Dataset' options (2d and 2e), and the 'View Full Screen Display' (3) and 'Download Graph (printable PDF)' (4) buttons.