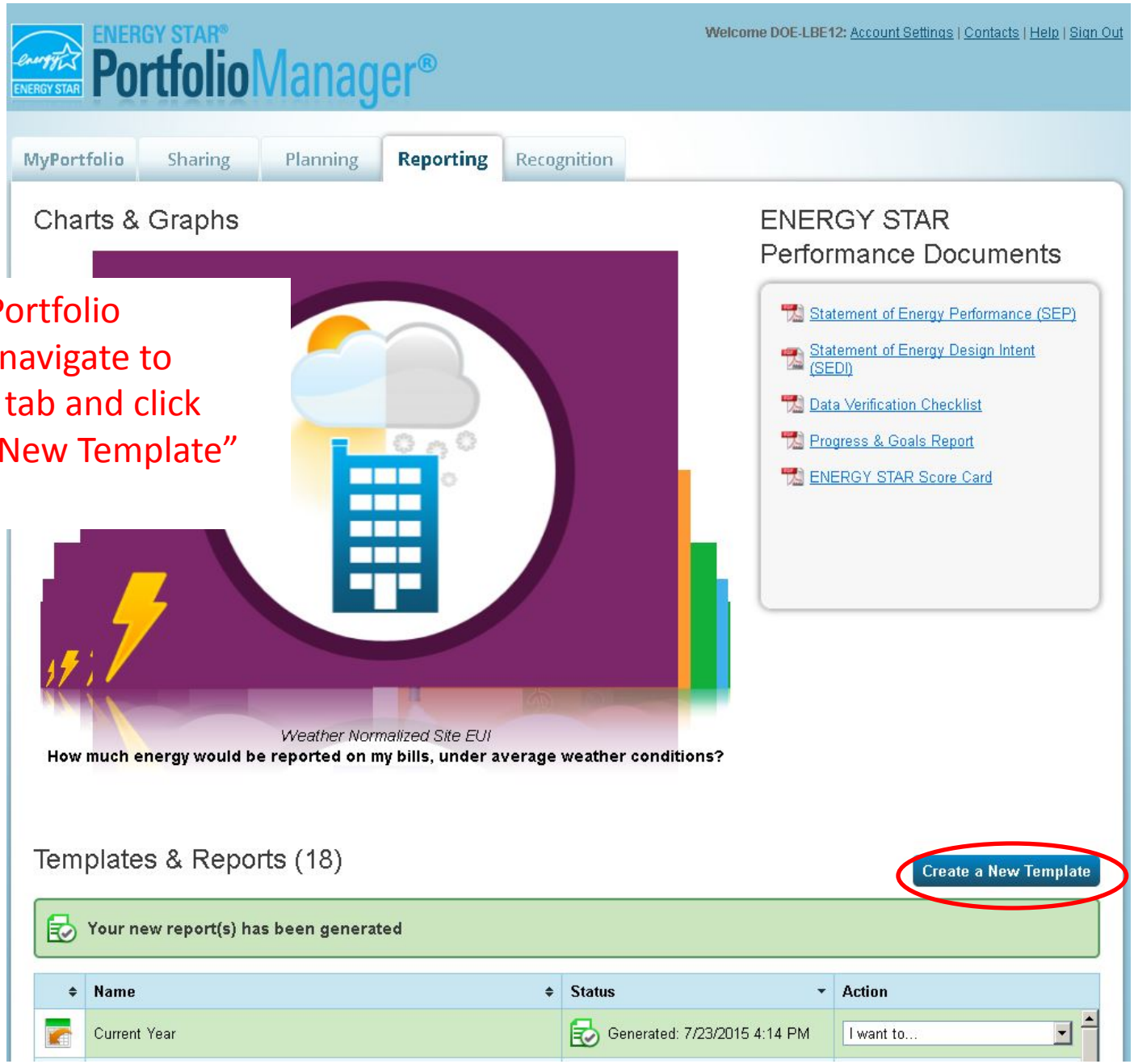
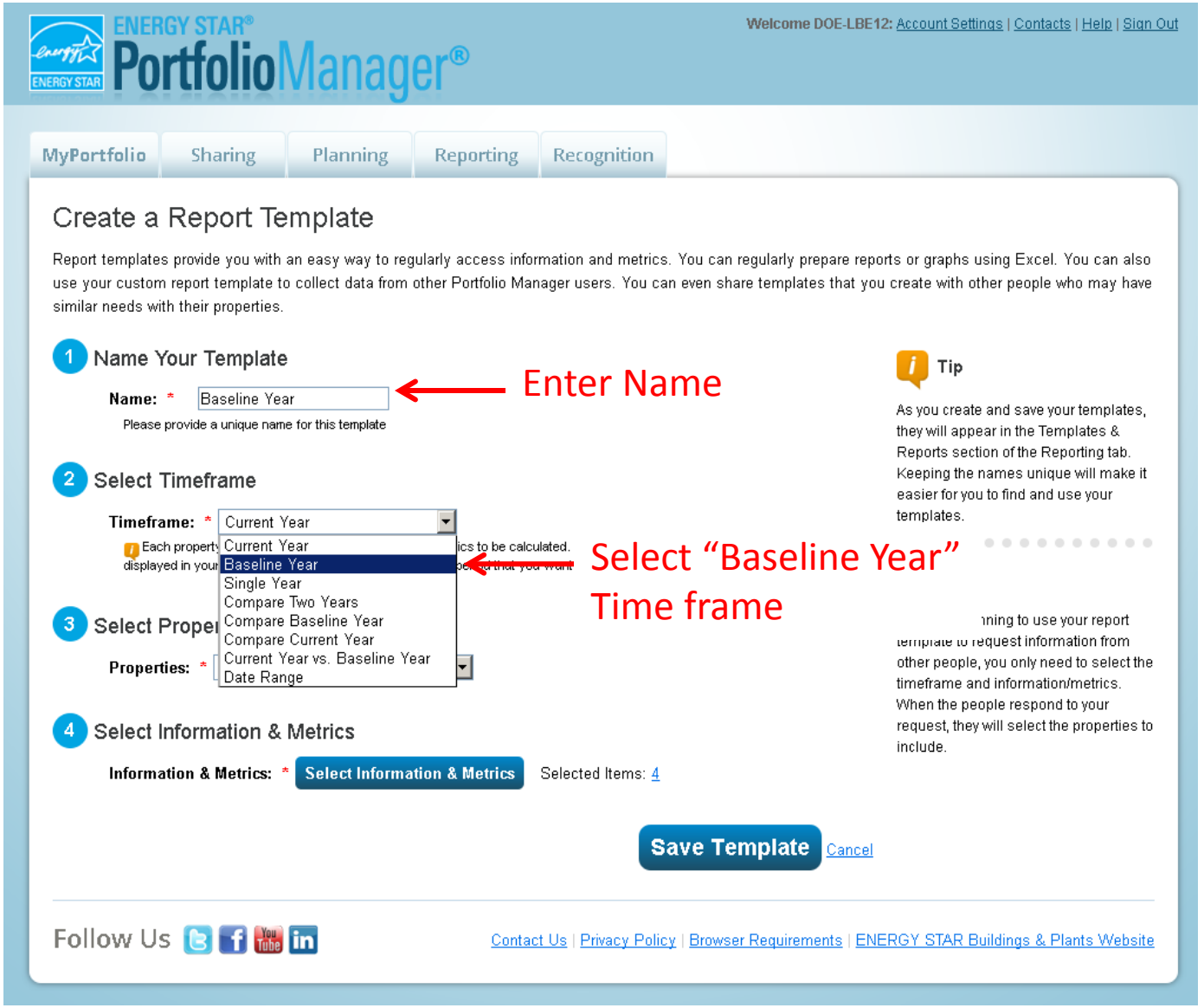
Log in to Portfolio Manager, navigate to Reporting tab and click "Create a New Template" button

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Welcome DOE-LBE12: Account Settings | Contacts | Help | Sign Out
MyPortfolio
Sharing
Planning
Reporting
Recognition
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: * Baseline Year
Please provide a unique name for this template
Enter Name
2 Select Timeframe
Timeframe: * Current Year
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 Prope
Properties: *
4 Select Information & Metrics
Information & Metrics: * Select Information & Metrics
Selected Items: 4
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.
ning to use your report
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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1 Name Your Template
Name: * Baseline Year
Please provide a unique name for this template
2 Select Timeframe
Timeframe: * Baseline Year
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 Inform
Information &
Selecte
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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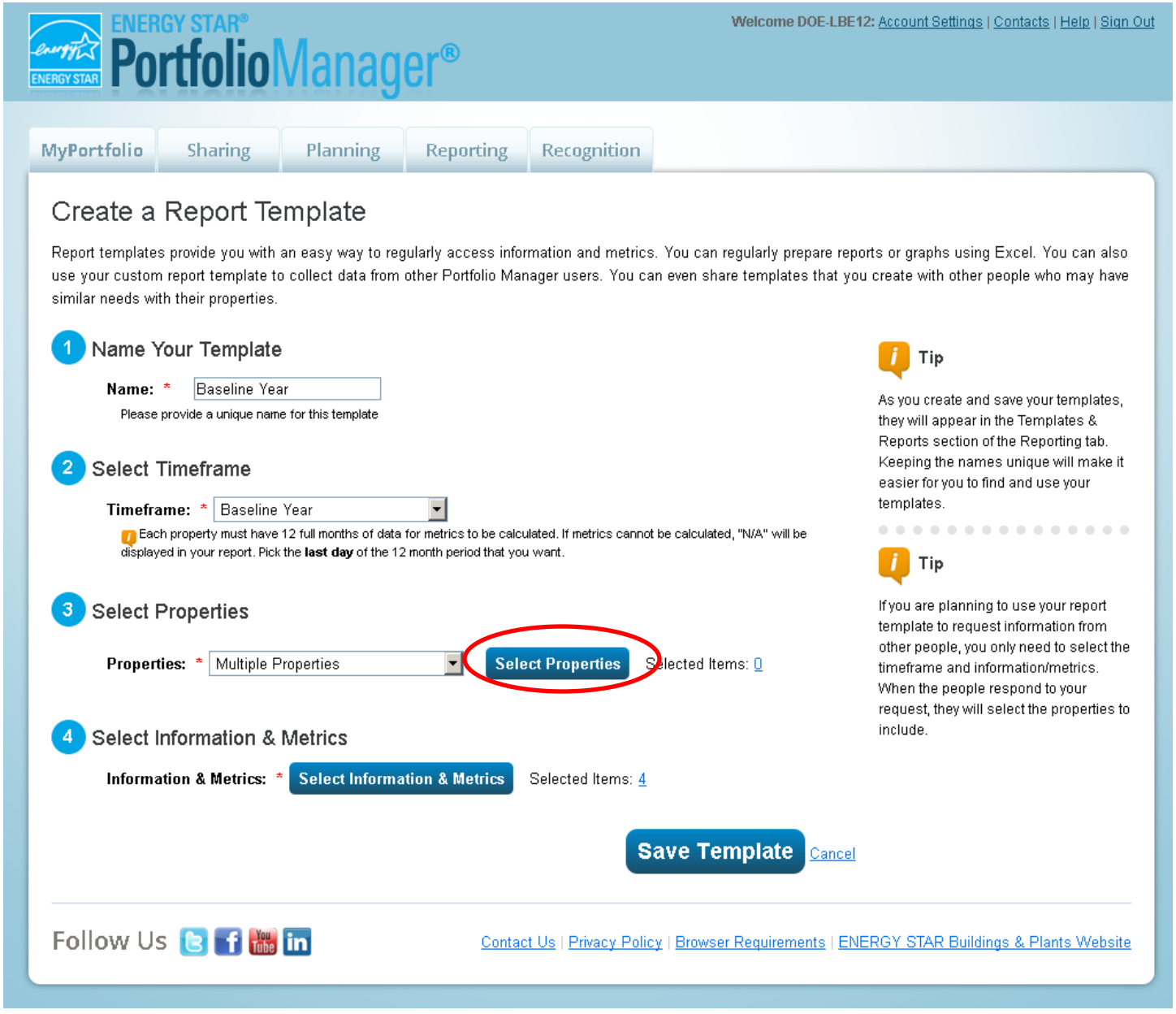
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Timeframe: * Baseline Year
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3 Select Properties
Properties: * Multiple Properties
Select Properties
Selected Items: 0
4 Select Information & Metrics
Information & Metrics: * Select Information & Metrics
Selected Items: 4
Save Template
Cancel
Tip
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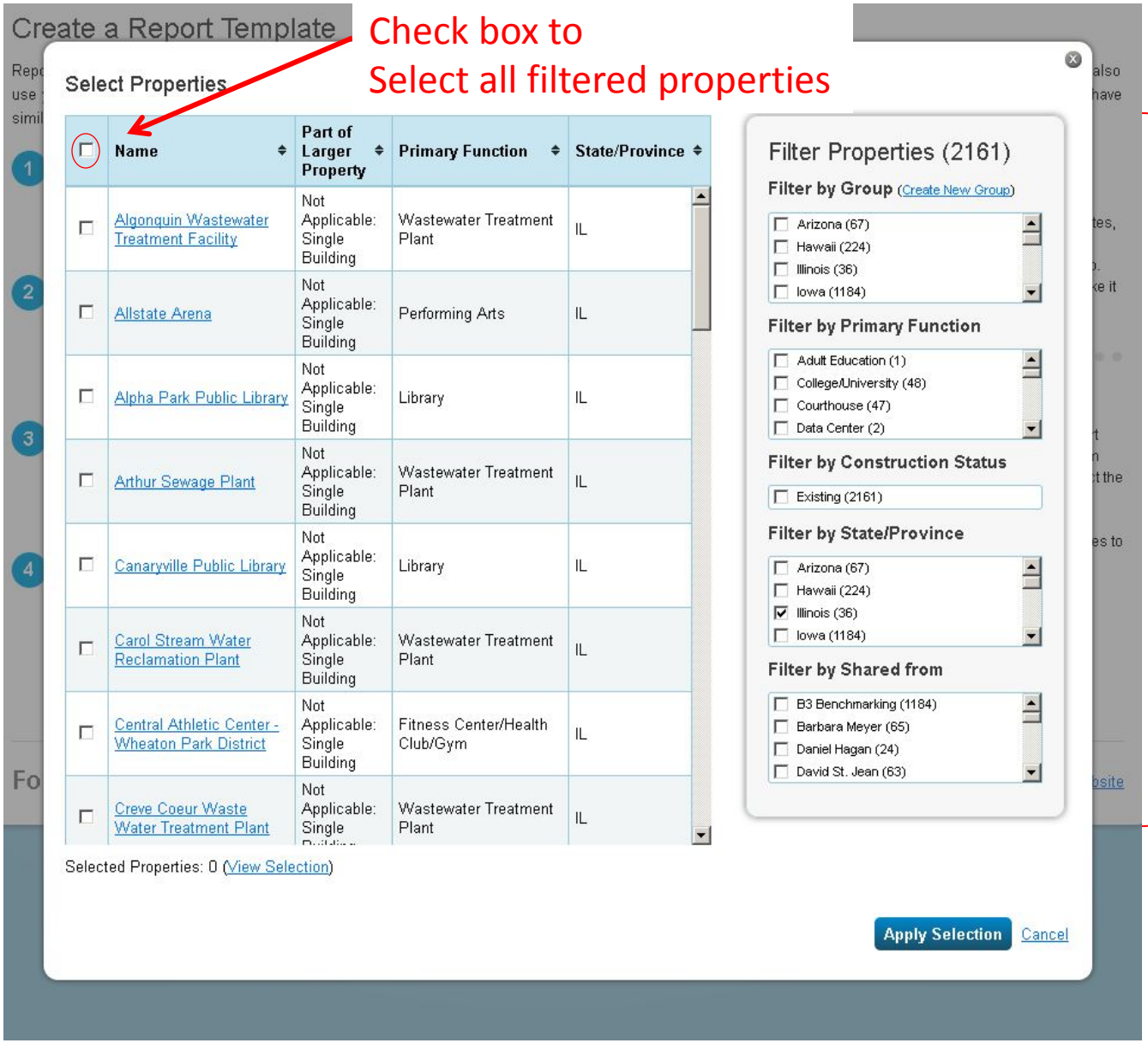
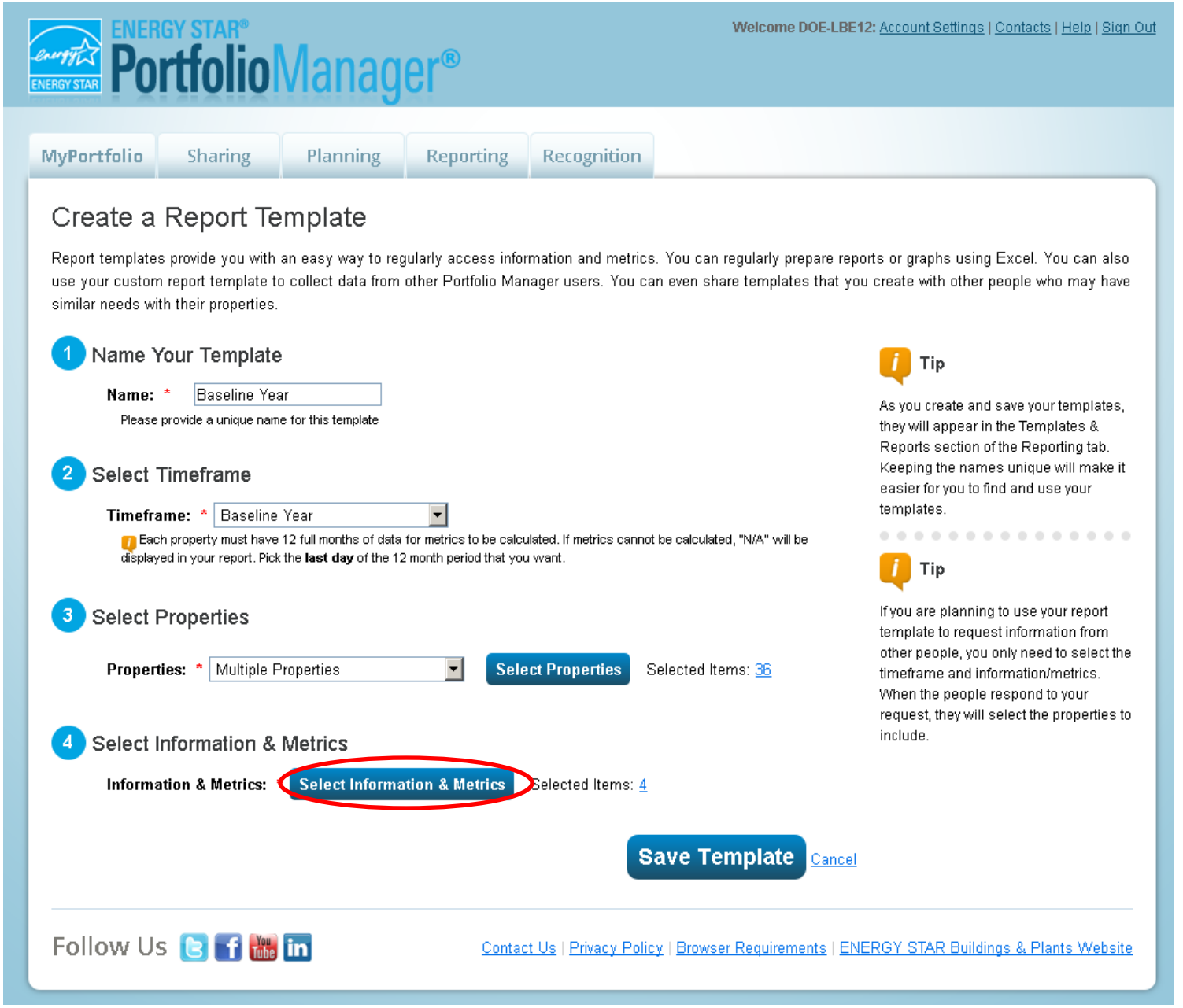


Using filters, choose properties to include in report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2 Select Timeframe
Timeframe: * Baseline Year
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3 Select Properties
Properties: * Multiple Properties
Select Properties
Selected Items: 36
4 Select Information & Metrics
Information & Metrics: * Select Information & Metrics
Selected Items: 4
Save Template
Cancel
Tip
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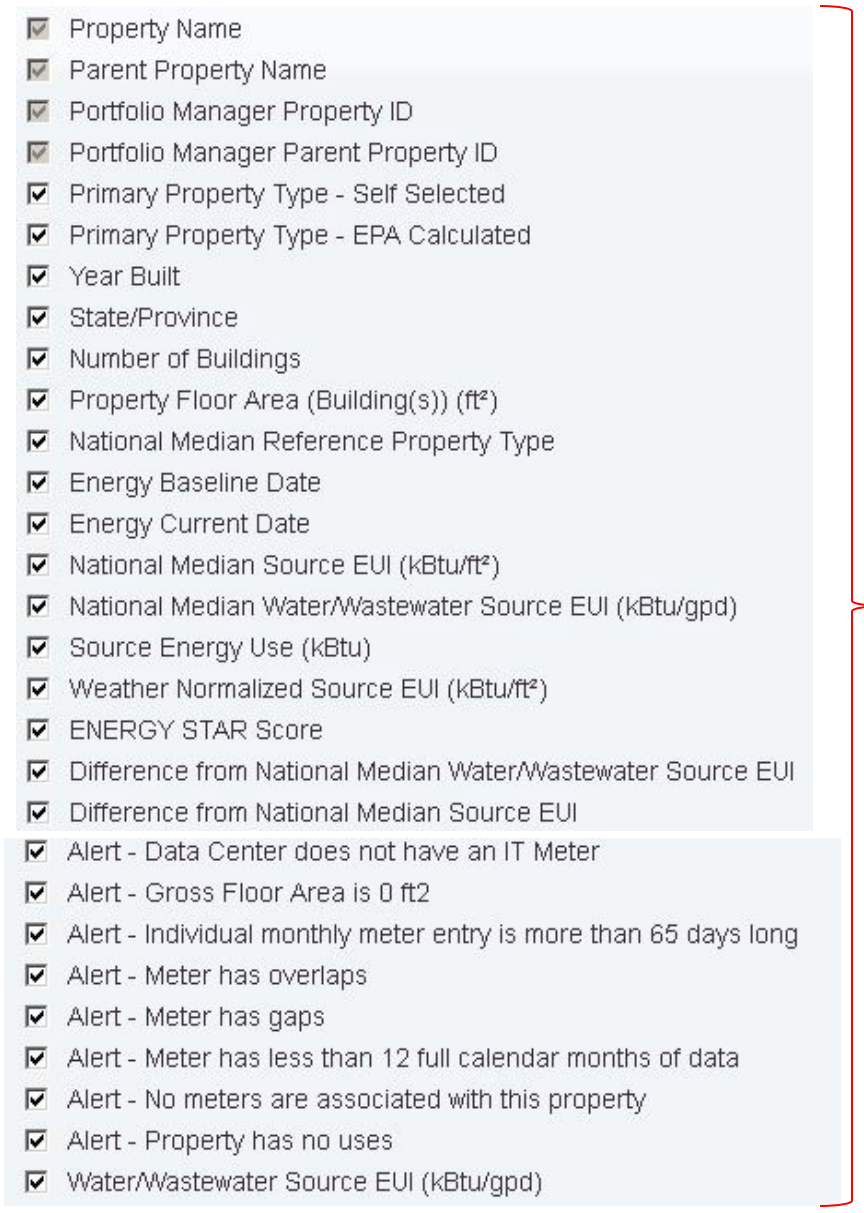

Select these reporting items for the template

Create a Report Template

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1 Name Your Template

Name: * Baseline Year

Please provide a unique name for this template

2 Select Timeframe

Timeframe: * Baseline Year

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: * Multiple Properties **Select Properties** Selected Items: 36

4 Select Information & Metrics

Information & Metrics: * **Select Information & Metrics** Selected Items: 29

Save Template Cancel

Tip

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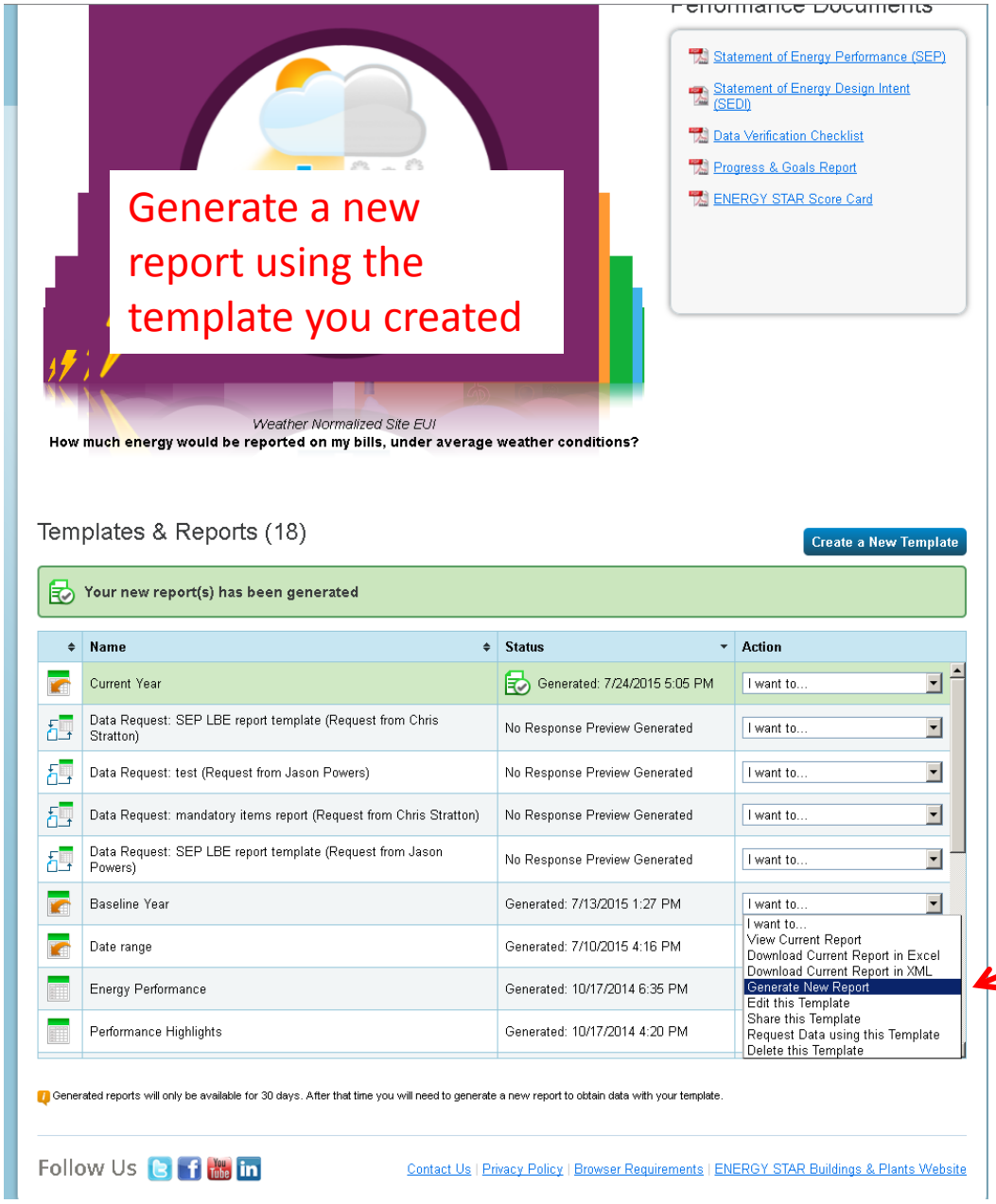
Tip

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.


Performance Documents
Statement of Energy Performance (SEP)
Statement of Energy Design Intent (SEDI)
Data Verification Checklist
Progress & Goals Report
ENERGY STAR Score Card
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?
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
Data Request: SEP LBE report template (Request from Chris Stratton)
No Response Preview Generated
Data Request: test (Request from Jason Powers)
Data Request: mandatory items report (Request from Chris Stratton)
Data Request: SEP LBE report template (Request from Jason Powers)
Baseline Year
Generated: 7/13/2015 1:27 PM
Date range
Generated: 7/10/2015 4:16 PM
Energy Performance
Generated: 10/17/2014 6:35 PM
Performance Highlights
Generated: 10/17/2014 4:20 PM
I want to...
I want to...
View Current Report
Download Current Report in Excel
Download Current Report in XML
Generate New Report
Edit this Template
Share this Template
Request Data using this Template
Delete this Template
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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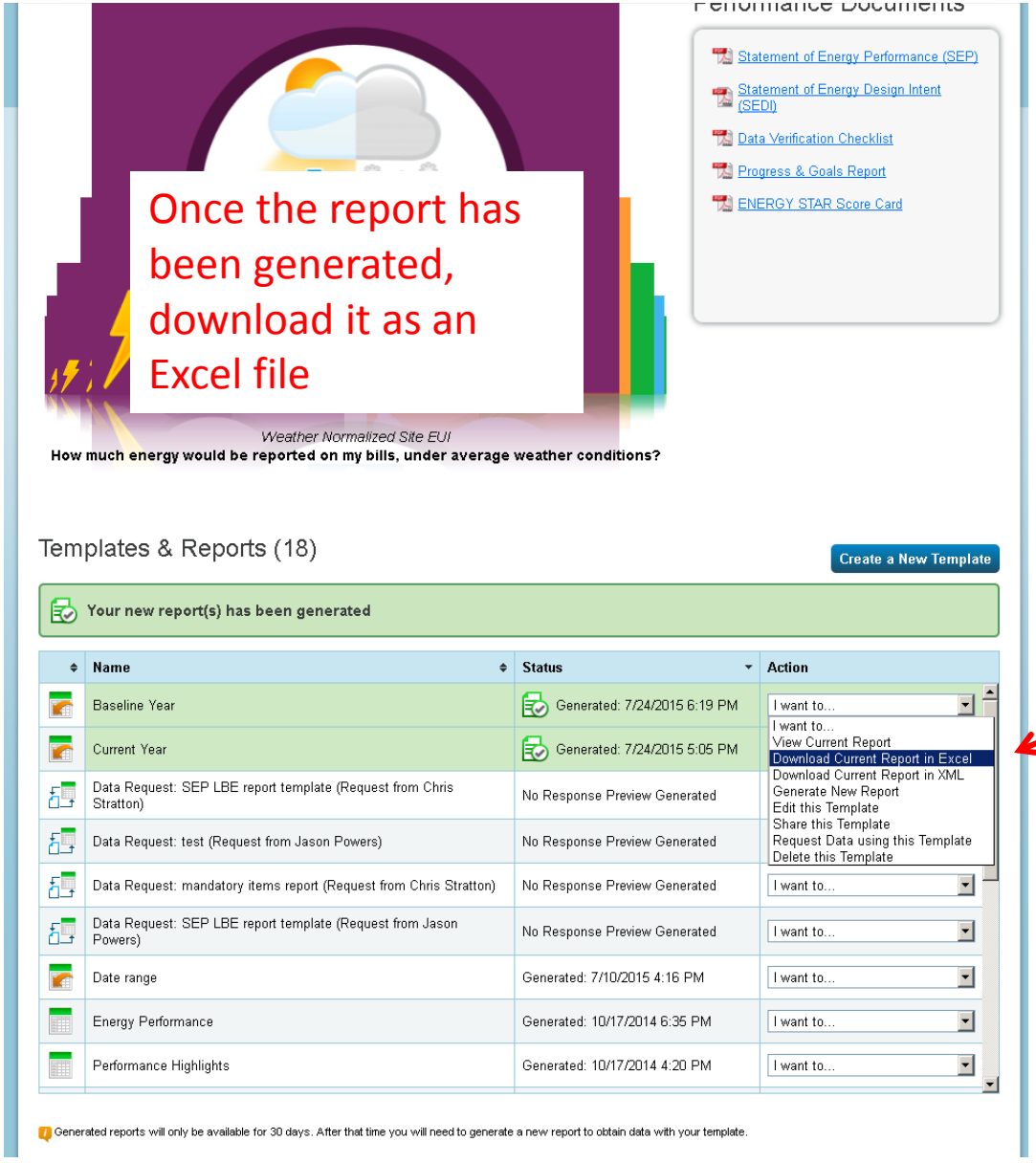
Performance Documents
Statement of Energy Performance (SEP)
Statement of Energy Design Intent (SEDI)
Data Verification Checklist
Progress & Goals Report
ENERGY STAR Score Card
Once the report has been generated, download it as an Excel file
Weather Normalized Site EUI
How much energy would be reported 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
Current Year
Generated: 7/24/2015 5:05 PM
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)
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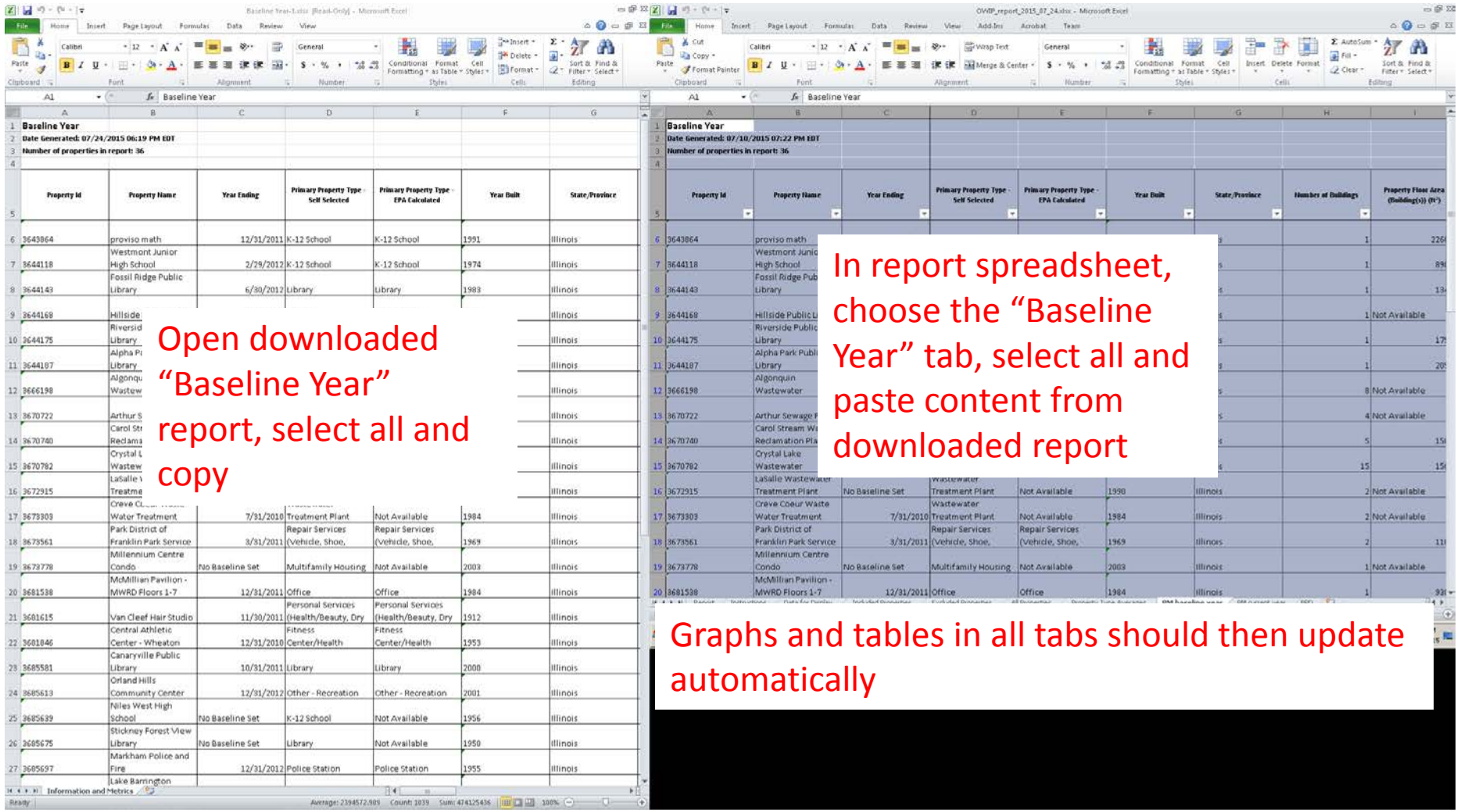
Open downloaded "Baseline Year" report, select all and copy
In report spreadsheet, choose the "Baseline Year" tab, select all and paste content from downloaded report
Graphs and tables in all tabs should then update automatically