Log in to Portfolio Manager, navigate to Reporting tab and click “Create a New Template” button.
Create a Report Template

Enter Name

Select "Baseline Year"

Time frame

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.

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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: 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
   - Select the properties you want to include in your report.

4. **Select Information & Metrics**
   - Select Multiple Properties
   - This allows you to select multiple properties for your report.

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**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.

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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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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: 0

4. Select Information & Metrics
   Information & Metrics: [Select Information & Metrics]
   Selected Items: 0

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Save Template Cancel
Using filters, choose properties to include in report

Select Properties

<table>
<thead>
<tr>
<th>Name</th>
<th>Part of Larger Property</th>
<th>Primary Function</th>
<th>State/Province</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algonquin Wastewater Treatment Facility</td>
<td>Not Applicable: Single Building</td>
<td>Wastewater Treatment Plant</td>
<td>IL</td>
</tr>
<tr>
<td>Allstate Arena</td>
<td>Not Applicable: Single Building</td>
<td>Performing Arts</td>
<td>IL</td>
</tr>
<tr>
<td>Alpha Park Public Library</td>
<td>Not Applicable: Single Building</td>
<td>Library</td>
<td>IL</td>
</tr>
<tr>
<td>Arthur Sewage Plant</td>
<td>Not Applicable: Single Building</td>
<td>Wastewater Treatment Plant</td>
<td>IL</td>
</tr>
<tr>
<td>Canaryville Public Library</td>
<td>Not Applicable: Single Building</td>
<td>Library</td>
<td>IL</td>
</tr>
<tr>
<td>Carol Stream Water Reclamation Plant</td>
<td>Not Applicable: Single Building</td>
<td>Wastewater Treatment Plant</td>
<td>IL</td>
</tr>
<tr>
<td>Central Athletic Center - Wheaton Park District</td>
<td>Not Applicable: Single Building</td>
<td>Fitness Center/Health Club/Gym</td>
<td>IL</td>
</tr>
<tr>
<td>Cree Creek Waste Water Treatment Plant</td>
<td>Not Applicable: Single Building</td>
<td>Wastewater Treatment Plant</td>
<td>IL</td>
</tr>
</tbody>
</table>

Selected Properties: 0 (View Selection)
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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

   Selected Items: 35

4. Select Information & Metrics

   Information & Metrics: Select Information & Metrics

   Selected Items: 4

Save Template  Cancel

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Select these reporting items for the template:

- 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)) (ft²)
- National Median Reference Property Type
- Energy Baseline Date
- Energy Current Date
- National Median Source EUI (kBtu/ft²)
- National Median Water/Wastewater Source EUI (kBtu/gpd)
- Source Energy Use (kBtu)
- Weather Normalized Source EUI (kBtu/ft²)
- 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 ft²
- 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)
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

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

Save Template
Generate a new report using the template you created

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

Templates & Reports (18)

<table>
<thead>
<tr>
<th>Name</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Year</td>
<td>Generated: 7/2/2015 5:35 PM</td>
<td>I want to...</td>
</tr>
<tr>
<td>Data Request: SEP LBE report template</td>
<td>No Response, Preview Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Data Request: Test</td>
<td>No Response, Preview Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Data Request: mandatory items report</td>
<td>No Response, Preview Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Data Request: SEP LBE report template</td>
<td>No Response, Preview Generated</td>
<td>I want to...</td>
</tr>
<tr>
<td>Baseline Year</td>
<td>Generated: 7/13/2016 1:27 PM</td>
<td>I want to...</td>
</tr>
<tr>
<td>Data Range</td>
<td>Generated: 7/13/2015 4:15 PM</td>
<td>I want to...</td>
</tr>
<tr>
<td>Performance Highlights</td>
<td>Generated: 10/17/2014 4:30 PM</td>
<td></td>
</tr>
</tbody>
</table>

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.
Once the report has been generated, download it as an Excel file.
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.