



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 system reports and templates, and graph information about your facilities and their performance. This tool will help you prioritize activities and measurements, 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 purposes. 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.

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