How to Respond to Data Requests in Portfolio Manager®

The ENERGY STAR Portfolio Manager tool helps you measure and track the energy and water use, waste and materials, and greenhouse gas emissions of your buildings, all in a secure on-line environment. You can use the results to identify underperforming buildings, set investment priorities, verify efficiency improvements, and receive recognition for superior energy performance.

Process for Responding to Data Requests

1. Access the request.
2. Prepare a response.
3. Preview the response.
4. Data quality alerts
5. Submit the response.

Portfolio Manager provides the ability for organizations wishing to collect data from a variety of individuals to develop and use a custom data request within Portfolio Manager. You may receive data requests from other users or organizations to provide property or portfolio data as part of a program or initiative. Each request includes a link that takes you to Portfolio Manager and provides instructions for completing the data request.

This process is often used in jurisdictions where there are voluntary benchmarking programs or mandatory benchmarking and disclosure policies.

Responding to a data request is different than sharing a complete property record with a contact because when you respond to a data request, you release only the information specified in the data request template.

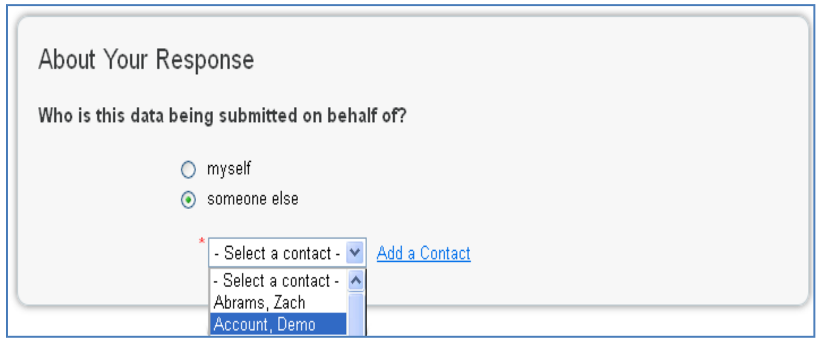
Follow the steps in this document to respond to a data request.

Access the Request

When another Portfolio Manager user sets up a data request, they will provide a link to access the request. The link may be provided via email or a guidance document or posted on a public website.

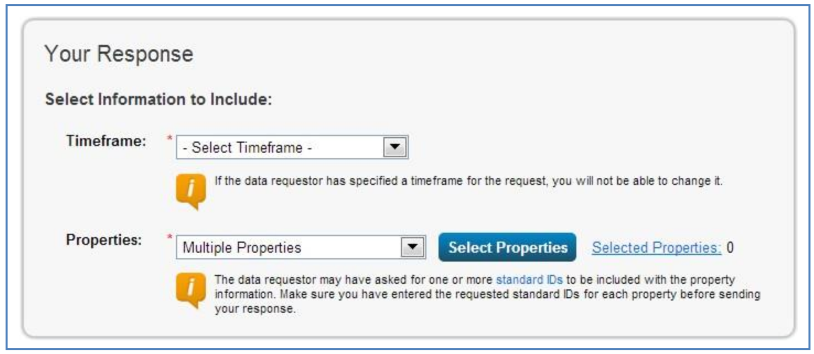
Click the link and then log in to Portfolio Manager as prompted. You will be directed to the **Respond to Data Request** page. Once you have initially accessed the data request by clicking the external link, the data request will always appear within your Portfolio Manager account in the **Reporting** tab and can be accessed there at any time.

Prepare a Response

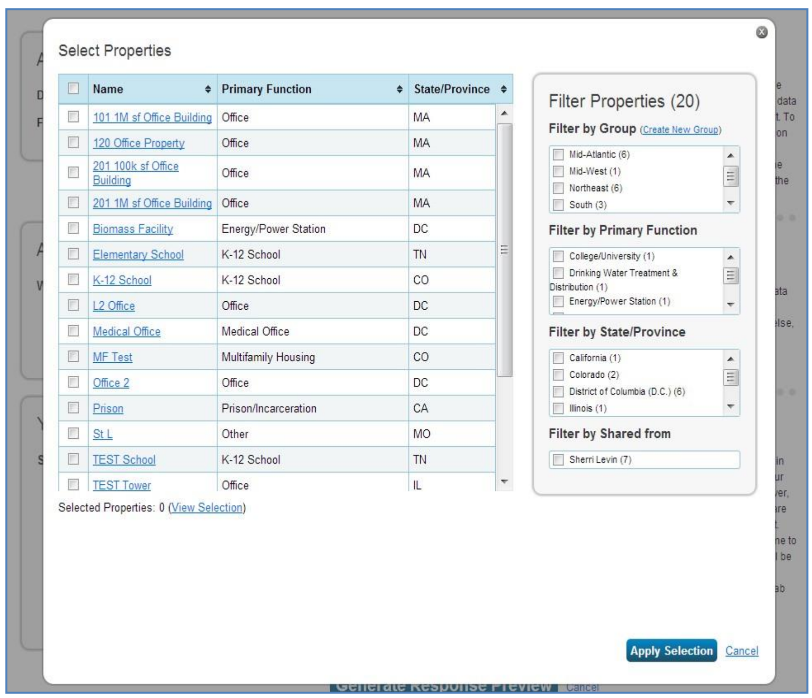


On the **Respond to Data Request** page, provide the requested information for each section. In the **About Your Response** section, select the user whose data is being submitted.

- Select **myself** to submit the response on your own behalf.
- Select **someone else** to choose a contact with whom you are associated. Select the contact from the drop-down list or click **Add a Contact** to add a new contact.



In the **Your Response** section, select information to include in the response.



- **Timeframe:** Select a time frame from the drop-down menu. If the requestor has specified a time frame, you will not be able to change it. **NOTE:** Portfolio Manager generates annual metrics; the month you select is the last month of the 12-month reporting period. For example, selecting December 2018 will generate metrics for the period 1/1/2018 to 12/31/2018.
- **Properties:** Select the number of properties to include in the response. If you select **Multiple Properties**, you must specify which properties to include. Click **Select Properties**, then choose the properties from the list and click **Apply Selection**. If there are many properties in your account, you can quickly identify properties to include in your response by sorting them based on group name, primary function, and location or by using the filter function.

Click **Generate Response Preview** after you have completed each section of the **Respond to Data Request** page.

Preview Response

After you generate the response preview, you can view it in on the **Reporting** tab. You will see a notification in the **Templates & Reports** section when your preview is available.

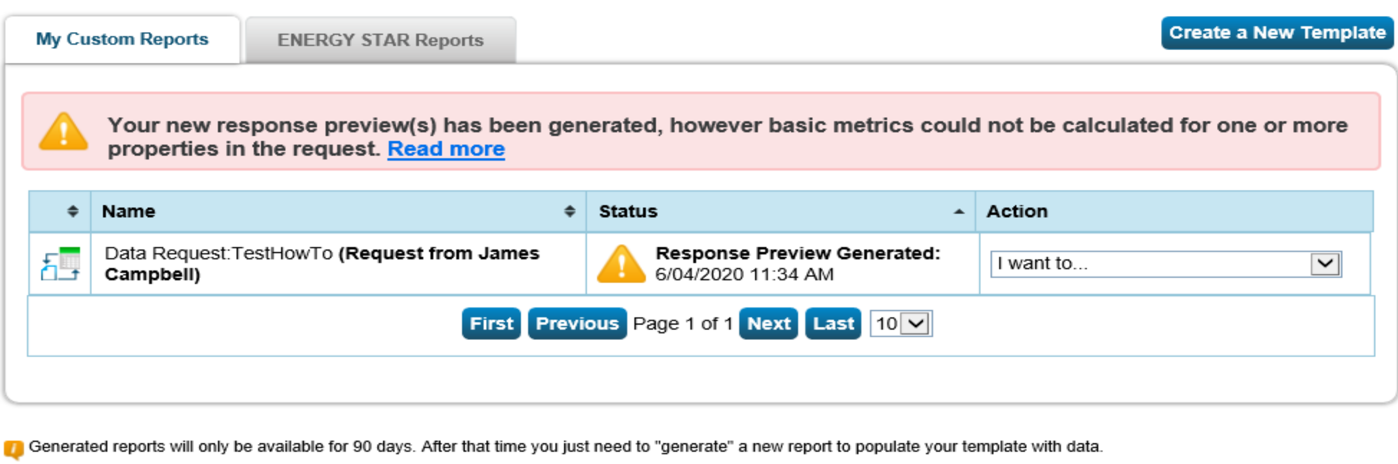
You can preview the response before sending it.

- Select **Preview Response** from the drop-down menu next to the report name to review the response in your browser window.
- Select **Download Preview in Excel** to review the information in Excel®.

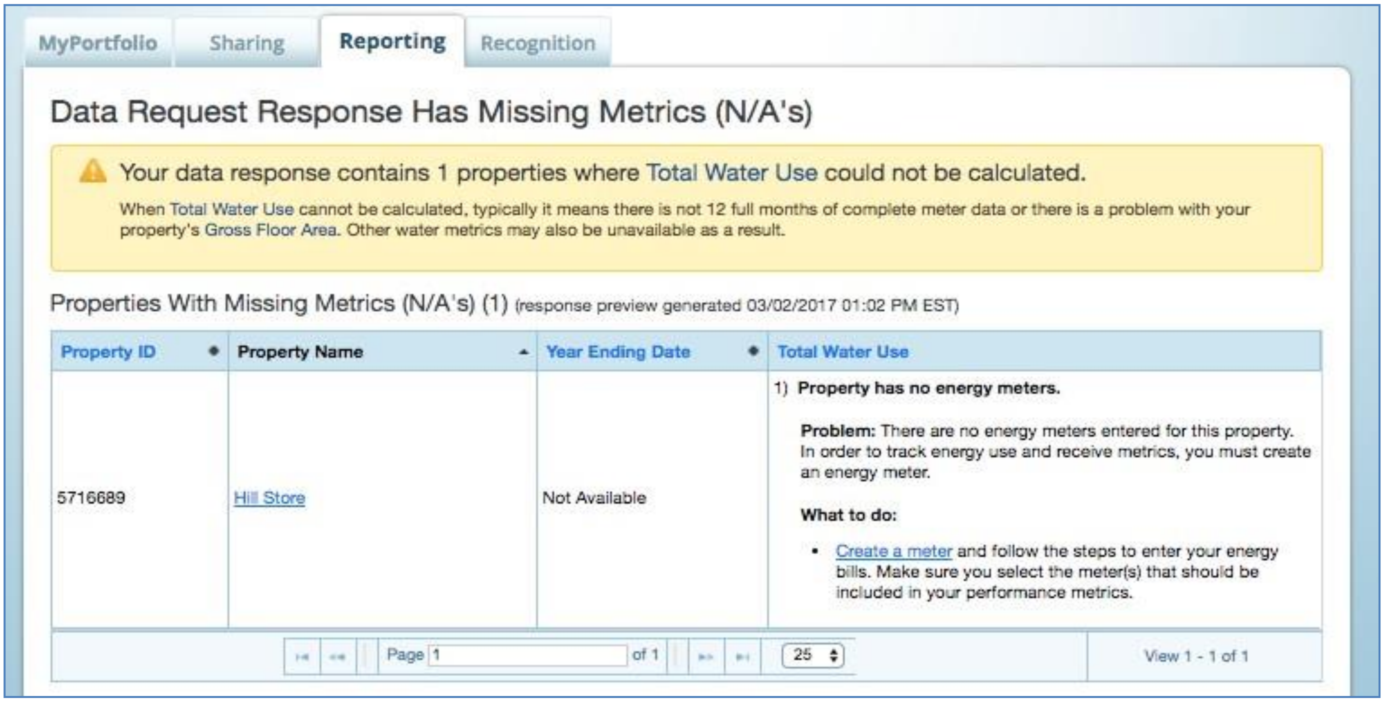
NOTE: If you want to select different properties or time frames for your response, select **Edit Properties and Timeframe**. If you make these or other changes to property data, select **Generate an Updated Response** from the drop-down menu, and then complete the information on the **Respond to Data Request** page. If you select **Delete Response**, the response will not be released and will be removed from your account. You will need to go back to the Data Request link to access the request and begin a new response.

Data Quality Alerts

Portfolio Manager's Data Quality Alerts clearly identify mistakes and omissions so they can be corrected before you send the data request response. If Portfolio Manager determines your energy or water metrics cannot be calculated for one or more properties in the request, a pink alert box will appear after you generate the response preview. There will also be an alert icon next to the data request in the Templates and Reports Table.

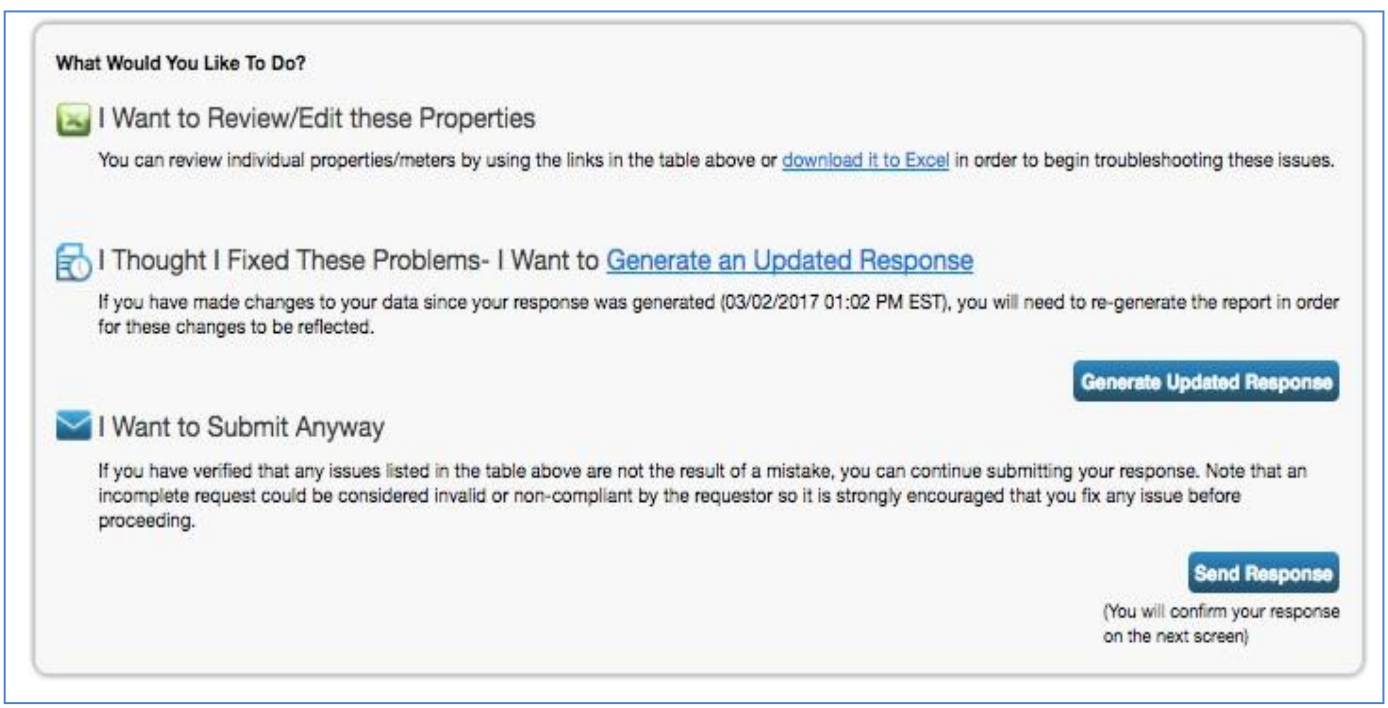


Click Read More to go to the alert page, which will list all the properties affected. Links within the alerts will take you to the specific screen where the data issue can be fixed.



The bottom of the alert page will present three options:

1. "I Want to Review/Edit these Properties." Review and edit the properties to resolve the alerts, then generate a new report, and submit the data.
2. "I Want to Generate an Updated Response." Generate a new report to account for the changes and fixes made since the last report was generated.
3. "I Want to Submit Anyway." Bypass the alerts, and submit the data as a response to the request.



After updating your properties to fix errors or omissions, click Generate an updated Response to refresh the report. If any alerts remain, the pink alert box will appear on the Reporting tab after the revised report is generated.

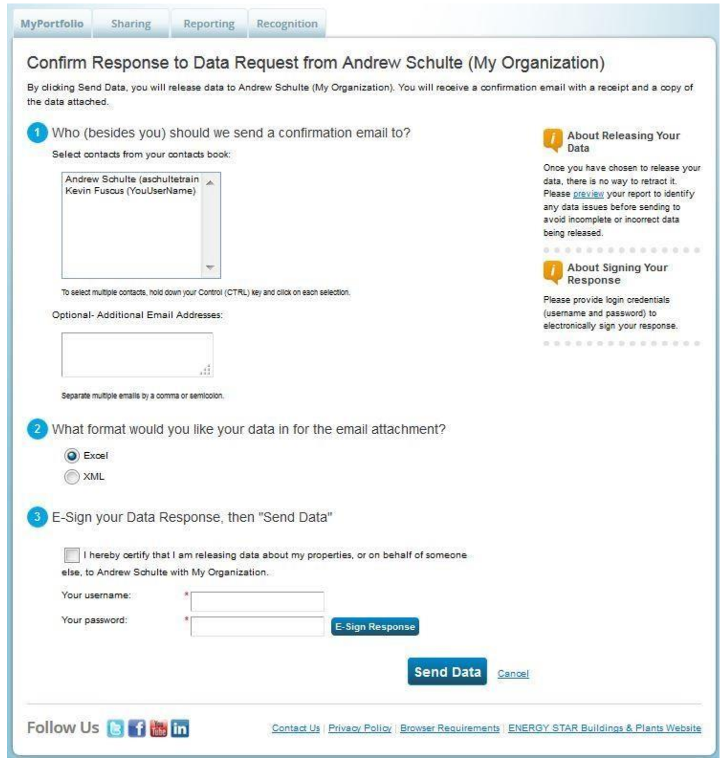
Submit Response

After you have reviewed and confirmed the data in the report, select **Send Response** from the **Action** drop-down menu next to the report name.

Select options on the **Confirm Response to Data Request** page.

- Select who else you want to receive a confirmation email. To add a contact, click **Contacts** in the upper right corner.
- Select the format of your data for the email attachment.
- E-Sign your response by entering your username and password. Then click **E-Sign Response**.

Click **Send Data** to send your data and complete the response. You will receive a confirmation email with a receipt and a copy of the data submitted.



Learn More!

To learn more about Portfolio Manager, visit ENERGY STAR for Buildings.
To get answers to your questions, contact Natural Resources Canada.