

## Standard Report Templates

The Portfolio Manager tool has nine standard reports with key metrics and information you can use to easily assess your portfolio's performance and progress and, thereby, make informed business decisions. This document lists the metrics included in each of the nine reports so you can see what each report offers.

### Standard Reports

- Performance Highlights
- Energy Performance
- Emissions Performance
- Water Performance
- Fuel Performance
- ENERGY STAR Certification Status
- Partner of the Year Report
- Sustainable Buildings Checklist Report
- Waste Performance

### Metrics Included in Every Report

- Property ID
- Property Name
- Parent Property Name
- City
- State/Province
- Postal Code
- Year Ending Date
- Property Floor Area

#### Performance Highlights

Energy Cost
Site EUI
Source EUI
Percentage Difference From National Median Source EUI
National Median Source EUI
Total GHG Emissions
Total Water Use
Total Water Cost (All Water Sources)
Total Waste (Disposed and Diverted)
Total Waste Cost (Disposed and Diverted)
ENERGY STAR Score

#### Energy Performance

Energy Cost
Site EUI
Source EUI
Percentage Difference From National Median Source EUI
National Median Source EUI
National Median Site EUI
Site EUI – Adjusted to Current Year
Source EUI – Adjusted to Current Year
Weather Normalized Site EUI
Weather Normalized Source EUI

### Timeframe & Properties

You can select timeframes and properties to include in standard reports. You can also generate multiple reports with different dates or groups of properties in order to view changes in your portfolio in detail.

Emissions Performance
Indirect GHG Emissions
Direct GHG Emissions
Total GHG Emissions
Avoided GHG Emissions
Net GHG Emissions
Electric Distribution Utility
eGRID Subregion
eGRID Output Emissions Rate

Water Performance
Total Water Use (All Water Sources)
Total Water Cost (All Water Sources)
Indoor Water Use (All Water Sources)
Indoor Water Cost (All Water Sources)
Indoor Water Intensity (All Water Sources)
Indoor Water Cost Intensity (All Water Sources)
Outdoor Water Use (All Water Sources)
Outdoor Water Cost (All Water Sources)

Fuel Performance
Site Energy Use
Energy Cost
Electricity Use – Grid Purchase
Electricity (Grid Purchase) Cost
Natural Gas Use
Natural Gas Cost
District Steam Use
District Steam Cost
Fuel Oil #2 Use
Fuel Oil #2 Cost
Propane Use
Propane Cost

ENERGY STAR Certification Status
ENERGY STAR Score
ENERGY STAR Certification – Year(s) Certified
ENERGY STAR Certification – Application Status
ENERGY STAR Certification – Last Approval Date
ENERGY STAR Certification – Next Eligible Date
ENERGY STAR Certification – Eligibility
Last Modified Date – Property
Property Data Administrator
Property Data Administrator – Email

Partner of the Year Report
Primary Property Type – Portfolio Manager – Calculated
ENERGY STAR Score
Site Energy Use
Source Energy Use
Site EUI
Source EUI
Total GHG Emissions
Weather Normalized Site Energy Use
Weather Normalized Source Energy Use
Weather Normalized Site EUI
Weather Normalized Source EUI
ENERGY STAR Certification (Year[s] Certified)

Waste Performance
Total Waste (Disposed and Diverted)
Total Waste Cost (Disposed and Diverted)
Total Waste Intensity (Disposed and Diverted)
Total Waste Cost Intensity (Disposed and Diverted)
Disposed Waste
Disposed Waste Cost
Diverted Materials
Diverted Materials Cost
Diversion Rate
Recycled Materials
Recycled Materials Cost
Donated/Reused Materials
Donated/Reused Materials Cost
Composted Materials
Composted Materials Cost

## Sustainable Buildings Checklist Report

<b>ID</b>
Portfolio Manager Parent Property ID
U.S. Agency Designated Covered Facility ID
U.S. Federal Real Property Unique Identifier
<b>Third Party Certification</b>
Third Party Certification Target Date of Compliance
Third Party Certification Actual Date of Compliance
<b>Portfolio Manager Information</b>
Primary Property Type – EPA Calculated
ENERGY STAR Score
ENERGY STAR Certification – Last Approval Date
<b>Energy Use Metrics</b>
Site EUI
Source EUI
Weather Normalized Site EUI
Weather Normalized Source EUI
Site EUI – Adjusted to Current Year
Source EUI – Adjusted to Current Year
On-site Renewable System Generation
On-site Renewable System Electricity Exported
Electricity – On-site Renewable System Electricity Used On-site/Coincident
Electricity Sourced from On-line Renewable Systems (% of Total Electricity, including Grid Purchase and On-site)
Total GHG Emissions
<b>Water Use Metrics</b>
Indoor Water Use (All Water Sources)
Indoor Water Intensity (All Water Sources)
Outdoor Water Use (All Water Sources)
<b>Cost Metrics</b>
Energy Cost
Energy Cost Intensity
Total Water Cost (All Water Types)
<b>Guiding Principles – Overview</b>
Actual Date of Compliance
Target Date of Compliance
Compliance Path
Checklist Manager
% Complete (Yes or NA)
% Yes
% Not Applicable
% In Process
% No
% Not Assessed

<b>Guiding Principle I. Integrated</b>
Team
Goals
Plan
Occupant Feedback
Commissioning
<b>Guiding Principle II. Energy</b>
Energy Efficiency (Any Option)
Energy Efficiency – ENERGY STAR Score
Energy Efficiency – Measured 20%
Energy Efficiency – Code 20%
Efficient Products
Measurement & Verification
On-site Renewable
Benchmarking
<b>Guiding Principle III. Water</b>
Indoor Water (Any Option)
Indoor Water – Code 20%
Indoor Water – Measured 20%
Outdoor Water (Any Option)
Outdoor Water – Measured 50%
Outdoor Water – Conventional 50%
Outdoor Water – No Outdoor Water
Stormwater
Efficient Products
<b>Guiding Principle IV. Indoor Environment</b>
Ventilation & Thermal Comfort
Moisture Control
Automated Lighting Controls
Daylighting & Occupant Controls
Daylighting
Occupant Controls
Low-Emitting Materials
Integrated Pest Management
Tobacco Smoke Control
<b>Guiding Principle V. Materials</b>
Recycled Content
Biobased Content
Environmentally Preferred Products
Waste & Materials Management
Ozone Depleting Compounds