

How to Create a Report in ENERGY STAR® Portfolio Manager®

Use these instructions to create the ENERGY STAR® Portfolio Manager® report requested (including for the Magna Awards application) and download it as an Excel file for upload.

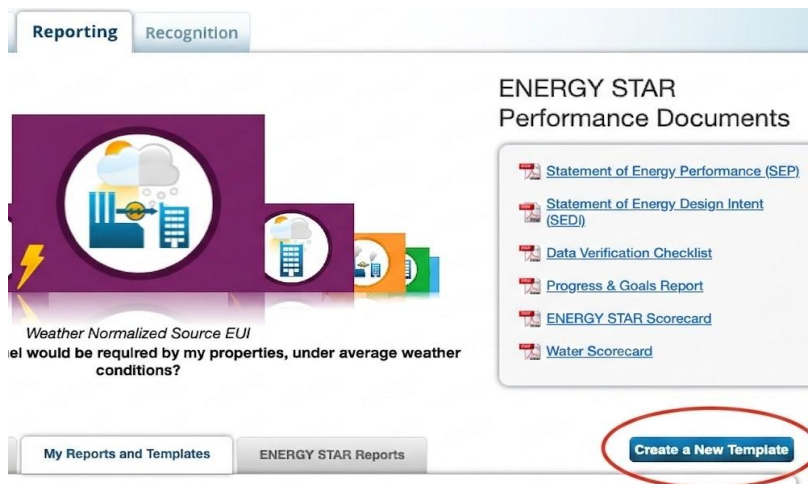
Start here: [ENERGY STAR® Portfolio Manager® login](#). Make sure the properties you want to include already have complete energy data in Portfolio Manager®.

STEP 1 Get Started

1. Sign in to ENERGY STAR® Portfolio Manager®: portfoliomanager.energystar.gov/pm/login
2. From the main dashboard, click the **Reporting** tab.
3. On the Reporting tab, click **Create a New Template**.



After sign-in, open the Reporting tab.

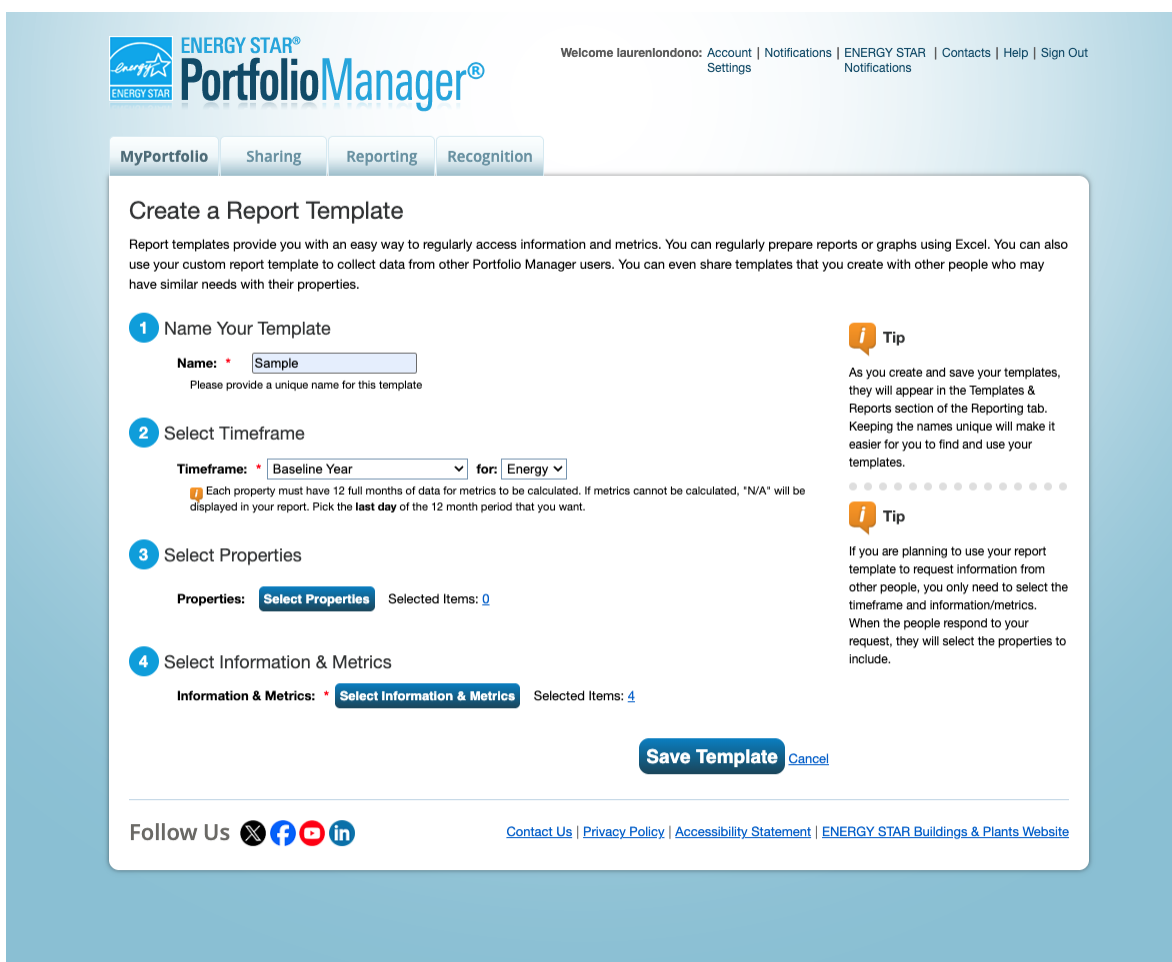


On the Reporting tab, select Create a New Template.

STEP 2 Create a report template

Use the **Create a Report Template** screen to name the report, choose the timeframe, select the properties, and open the information and metrics selector.

1. Give the report a **clear name**, such as “2027 Magna Awards_X School District.”
2. Under **Select Timeframe**, choose Baseline Year for Energy.
3. Under **Select Properties**, choose the district properties or schools you want included in the report.
4. Then select **Select Information & Metrics** to choose the data fields required for the Magna Awards report.



ENERGY STAR® Portfolio Manager®

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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:

Please provide a unique name for this template
- 2 Select Timeframe**

Timeframe: for:

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 Properties](#) Selected Items: [0](#)
- 4 Select Information & Metrics**

Information & Metrics: [Select Information & Metrics](#) Selected Items: [4](#)

[Save Template](#) [Cancel](#)

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Portfolio Manager®: Create a Report Template

Important: For the timeframe, select Baseline Year for Energy. Then select the properties you want included before choosing the required information and metrics.

STEP 3 Select the required information and metrics

In the **Select Information & Metrics** window, include the following fields. The four property identification fields will be selected automatically.

Select Information & Metrics

- ✓ ENERGY STAR Score
- ✓ Energy Cost Intensity (\$/ft²)
- ✓ Direct GHG Emissions (**Metric Tons** CO₂e)
- ✓ Indirect (Location-Based) GHG Emissions (**Metric Tons** CO₂e)
- ✓ Total (Location-Based) GHG Emissions Intensity (**kgCO₂e/ft²**)

Where to find it:

Energy Performance Metrics

Cost Performance Metrics

Greenhouse Gas Emissions

Greenhouse Gas Emissions

Greenhouse Gas Emissions

Select Information & Metrics Selected items: 9 of 50 maximum

Property Information	☒ Property Name	
Property ID Numbers	☒ Parent Property Name	
Property Use Details	☒ Portfolio Manager Property ID	
Meter Information	☒ Portfolio Manager Parent Property ID	
Energy Use by Fuel Source	☒ ENERGY STAR Score	x
Data Accuracy	☒ Energy Cost Intensity (\$/ft ²)	x
Energy Performance Metrics	☒ Direct GHG Emissions (Metric Tons CO ₂ e)	x
Water Performance Metrics	☒ Indirect (Location-Based) GHG Emissions (Metric Tons CO ₂ e)	x
Waste Performance Metrics	☒ Total (Location-Based) GHG Emissions Intensity (kgCO ₂ e/ft ²)	x
Cost Performance Metrics		
Greenhouse Gas Emissions		
Renewable Energy & Green Power		
ENERGY STAR/NextGen Certification		

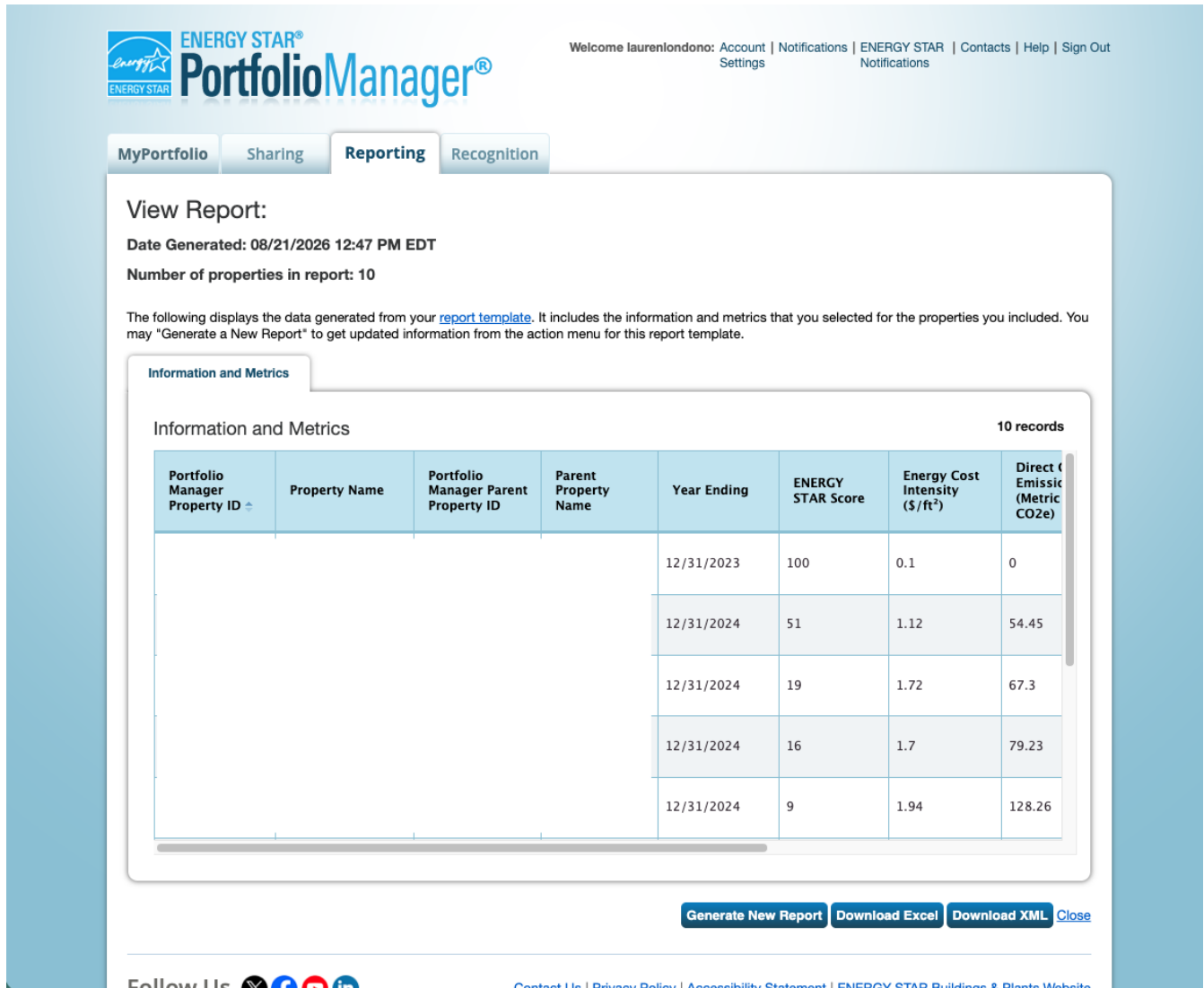
 [Download Full List of Information & Metrics](#) Selected items: 9 of 50 maximum **Apply Selection** [Cancel](#)

Select the nine fields shown above, then click Apply Selection.

Finish this step: Click Apply Selection, return to the report template page, and click Save Template.

STEP 4 Generate and review the report

- From the **Reporting** tab, open the report template you just created.
- Choose **Generate New Report** to pull the current data for the selected properties.
- Review the report and confirm that the expected properties appear.
- Use the horizontal scroll bar at the bottom of the report table to review all selected metrics.



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View Report:

Date Generated: 08/21/2026 12:47 PM EDT

Number of properties in report: 10

The following displays the data generated from your [report template](#). It includes the information and metrics that you selected for the properties you included. You may "Generate a New Report" to get updated information from the action menu for this report template.

Information and Metrics

Information and Metrics 10 records

Portfolio Manager Property ID	Property Name	Portfolio Manager Parent Property ID	Parent Property Name	Year Ending	ENERGY STAR Score	Energy Cost Intensity (\$/ft²)	Direct GHG Emissions (Metric CO2e)
				12/31/2023	100	0.1	0
				12/31/2024	51	1.12	54.45
				12/31/2024	19	1.72	67.3
				12/31/2024	16	1.7	79.23
				12/31/2024	9	1.94	128.26

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Report view: property information, ENERGY STAR® Score, Energy Cost Intensity, and Direct GHG Emissions

STEP 5 Download the Excel file and upload it with your Magna application

- Scroll across the report to confirm that the indirect GHG emissions and total GHG emissions intensity fields are included.
- Click **Download Excel** at the bottom of the report page.
- Save the Excel file in a location you can easily find. A useful file name is "DistrictName_2027_Magna_Energy_Report.xlsx."
- Upload that Excel file where requested in the Magna Awards application.



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Information and Metrics

Information and Metrics 10 records

Property	Year Ending	ENERGY STAR Score	Energy Cost Intensity (\$/ft²)	Direct GHG Emissions (Metric Tons CO2e)	Indirect (Location-Based) GHG Emissions (Metric Tons CO2e)	Total (Location-Based) GHG Emissions Intensity (kgCO2e/ft²)
	12/31/2023	100	0.1	0	800.52	0.65
	12/31/2024	51	1.12	54.45	287.84	6.19
	12/31/2024	19	1.72	67.3	505	8.8
	12/31/2024	16	1.7	79.23	436.73	9.21
	12/31/2024	9	1.94	128.26	884.01	10.44

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Report view: use the horizontal scroll bar to review the remaining emissions fields, then select **Download Excel**.

Before you upload: Confirm the Excel report includes the correct district properties and all nine required fields.

