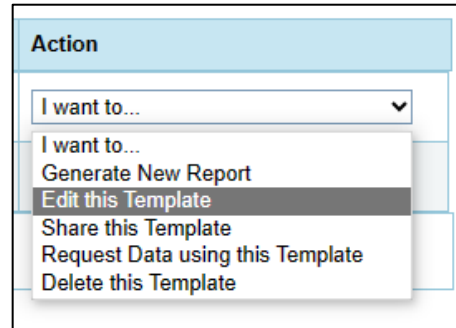


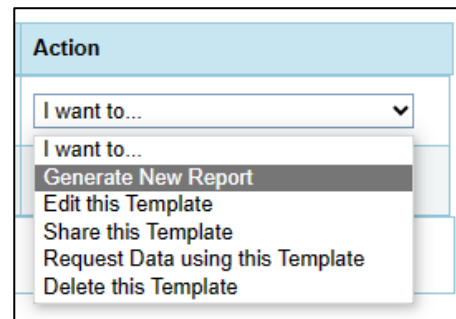
Exporting Data from Portfolio Manager to Prepare for State Chancellor's Office (CCCCO) Energy Usage Calculator

1. Follow [this link to open the report template](#) in Portfolio Manager.
2. Under the **"My Reports and Templates"** tab, under **"Action"**, select **"I want to..." "Edit this Template"**.
3. The timeframe is already selected for the year ending June 30, 2023. Change this date to generate a report for a different time period.

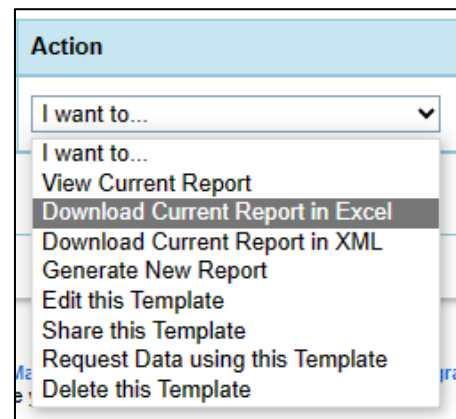


4. Select **"Select Properties"**. Select all of your properties that you will report separately to the CCCCCO. If you have a campus with meters in child properties that contribute to the overall campus usage, only select the parent campus property. Select **"Apply Selection"**.
5. The information and metrics are already selected. Select **"Save Template"**.

6. Under the **"My Reports and Templates"** tab, under **"Action"**, select **"I want to..." "Generate New Report"**.



7. Once the report is generated, under the **"My Reports and Templates"** tab, under **"Action"**, select **"I want to..." "Download Current Report in Excel"**.
8. The report will display each property and its annual totals for electric (combined onsite generation and imported from grid) and gas (natural gas). If any of the fields read "Not Available", this means that there is incomplete data for the particular property and time range. Run the [Data Quality Checker](#) for the same time period to identify what data is causing the error.



9. The report will also generate the gross square footage of each campus that was last entered into Portfolio Manager. Ensure this value is up to date. See [My property was expanded. How do I update the GFA? \(force.com\)](#) for guidance on how to update the GFA before you generate the report.

10. Use these values to add the square footage and energy usage from the most recent fiscal year to your District's Energy Calculator.

For additional support, contact Lisa Imai at limai@fpps.us.