

# Standard Energy Efficiency Data Platform™



U.S. DEPARTMENT OF  
**ENERGY**

Energy Efficiency &  
Renewable Energy



## SEED PLATFORM™ 2.4.0

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# Standard Use Cases

## Use Case to Cover

- **Energy Benchmarking**
  - Commercial Buildings

## Outcomes

- **Annual Disclosure Report**
  - By Tax Parcel ID
- **List of Building Violations**
  - By Tax Parcel ID
- **Annual Report of Building Stock Performance**
  - By energy (Portfolio Manager data)

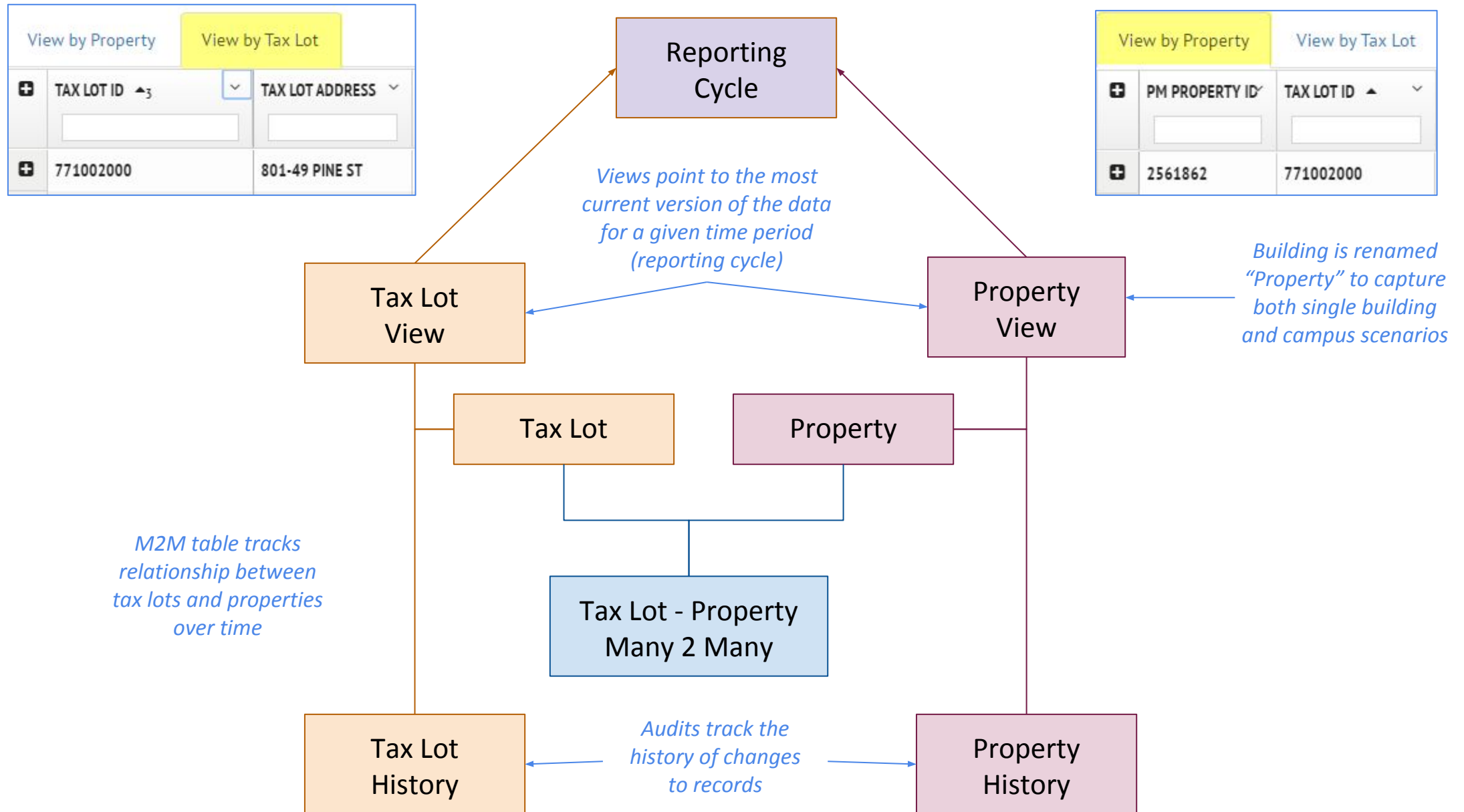
# Standard Use Cases

## Tasks to achieve outcomes:

- **Import data from different sources**
  - Tax assessor lists
  - Costar Data
  - Portfolio Manager Data
- **Match data from different sources**
- **Handle data with different types of relationships**
  - Tax Assessor data defined by Lot/Parcel  
vs
  - CoStar or Portfolio Manager data defined by buildings
- **Maintain data based on compliance year**

# Data Model Schematic

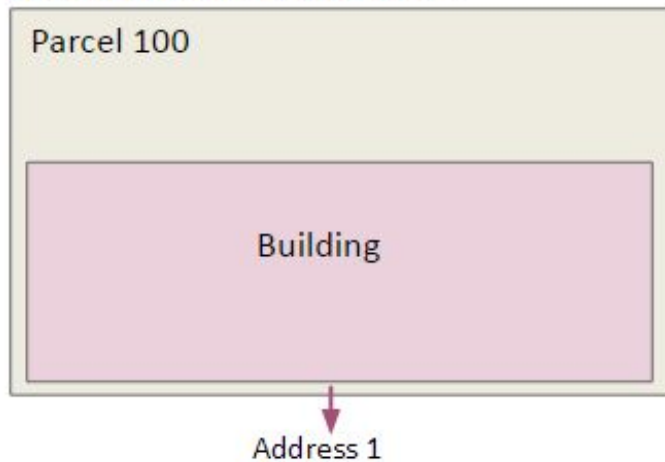
- View different states in time
- Many to many relationship between Tax Lot data and Building/Portfolio Manager data
- Viewing Tax Lot and Property data combined / rolled up



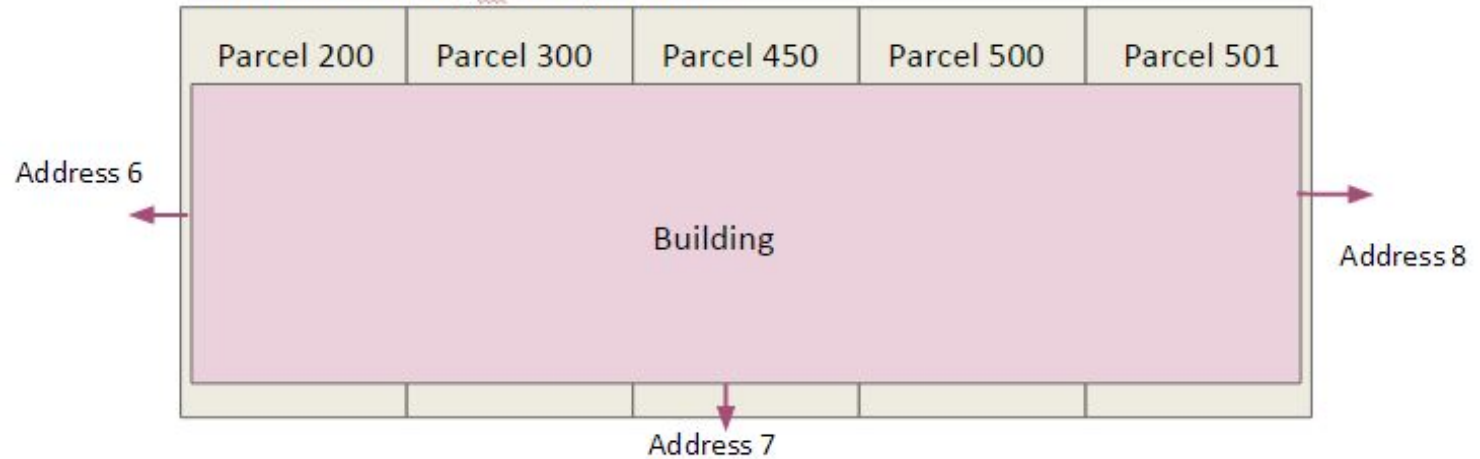
# Physical reality of the data

The relationship of Buildings to Parcels/Tax Lots can be complicated

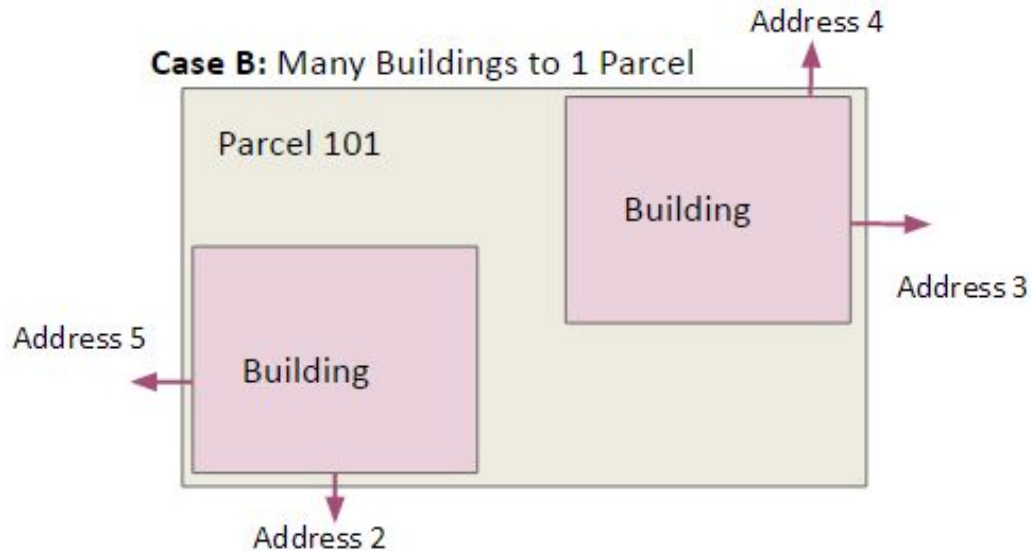
**Case A: 1 Building to 1 Parcel**



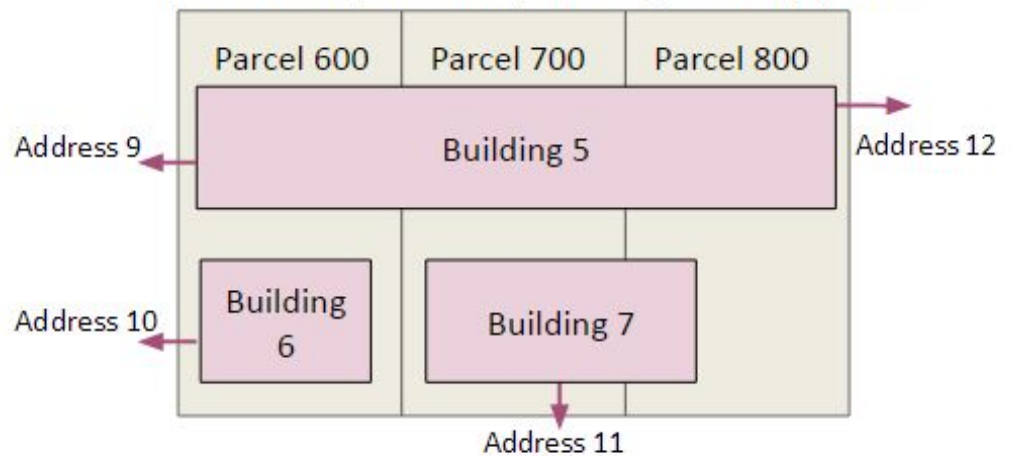
**Case C: 1 Building to many Parcels**



**Case B: Many Buildings to 1 Parcel**

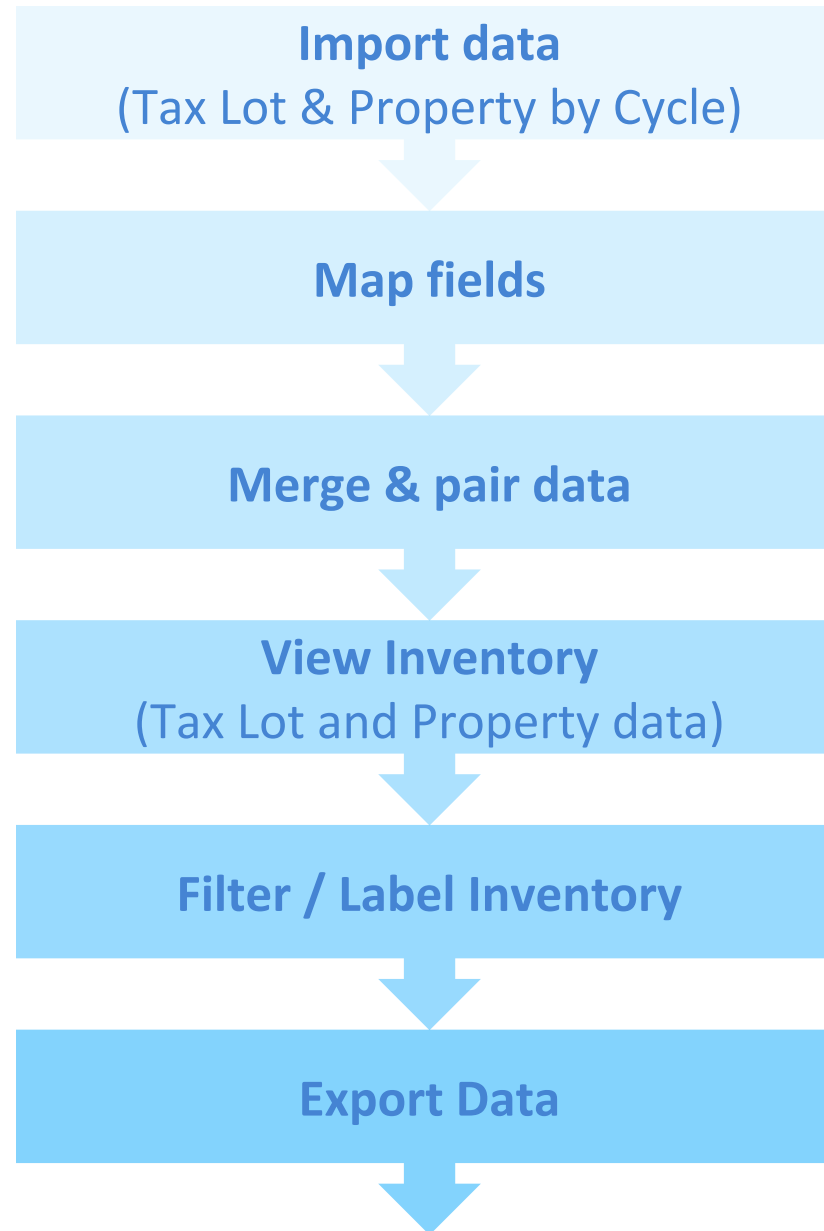


**Case D: Campus -- many buildings to many parcels**



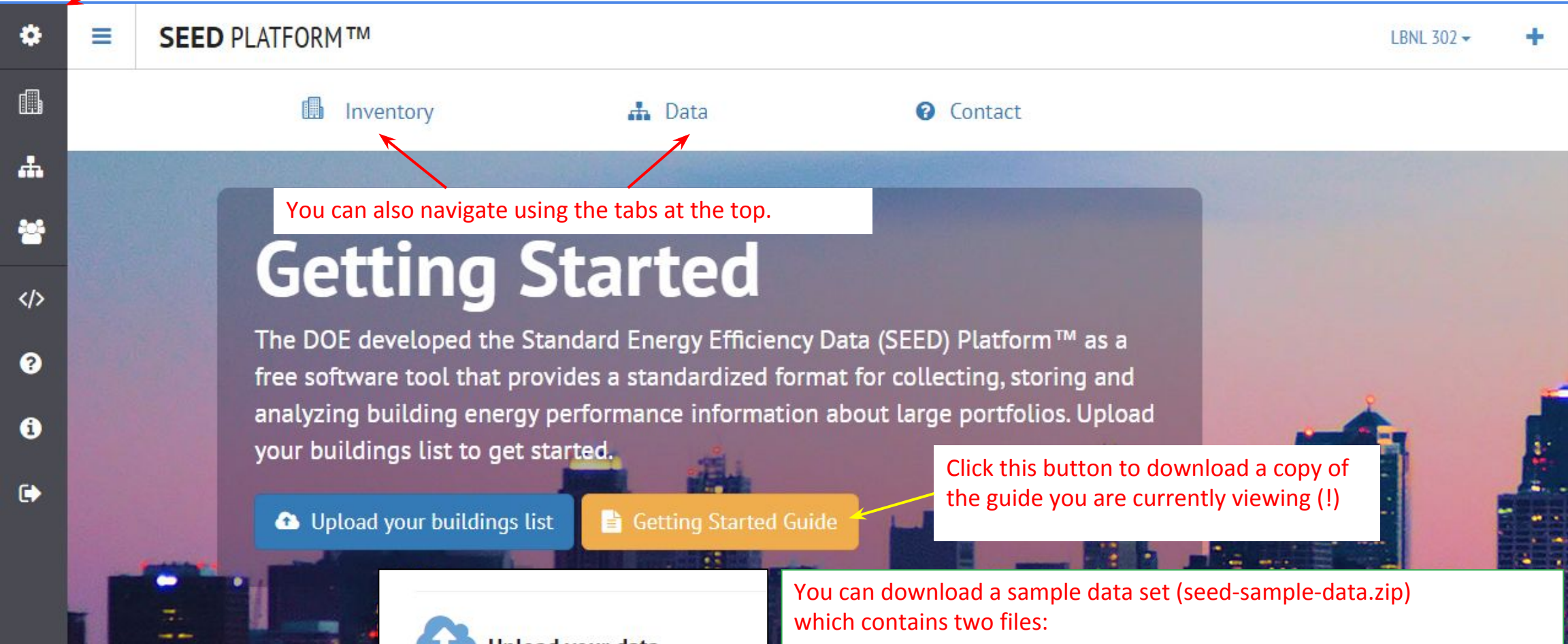


# SEED Workflow



# Home Page

You can open the Navigation Side Bar to view different program areas



You can also navigate using the tabs at the top.

Click this button to download a copy of the guide you are currently viewing (!)

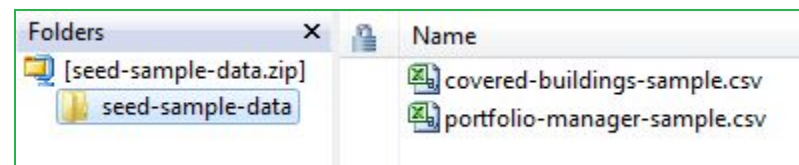
## Upload your data

Get started using SEED Platform™ by uploading your buildings list (city tax assessor data) and then your EPA Portfolio Manager data. Make sure these files are each in .csv, .xls, .xlsx, or .xml format. The SEED Platform will help you map and validate your data in the process of loading.

Download Sample Data

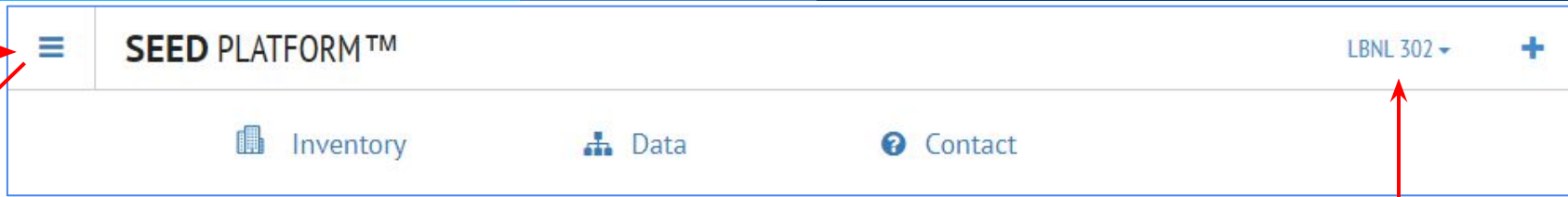
You can download a sample data set (seed-sample-data.zip) which contains two files:

- Covered-buildings-sample.csv (tax assessor building list)
- Portfolio-manager-sample.csv (custom report data from ENERGY STAR Portfolio Manager)



# Navigation

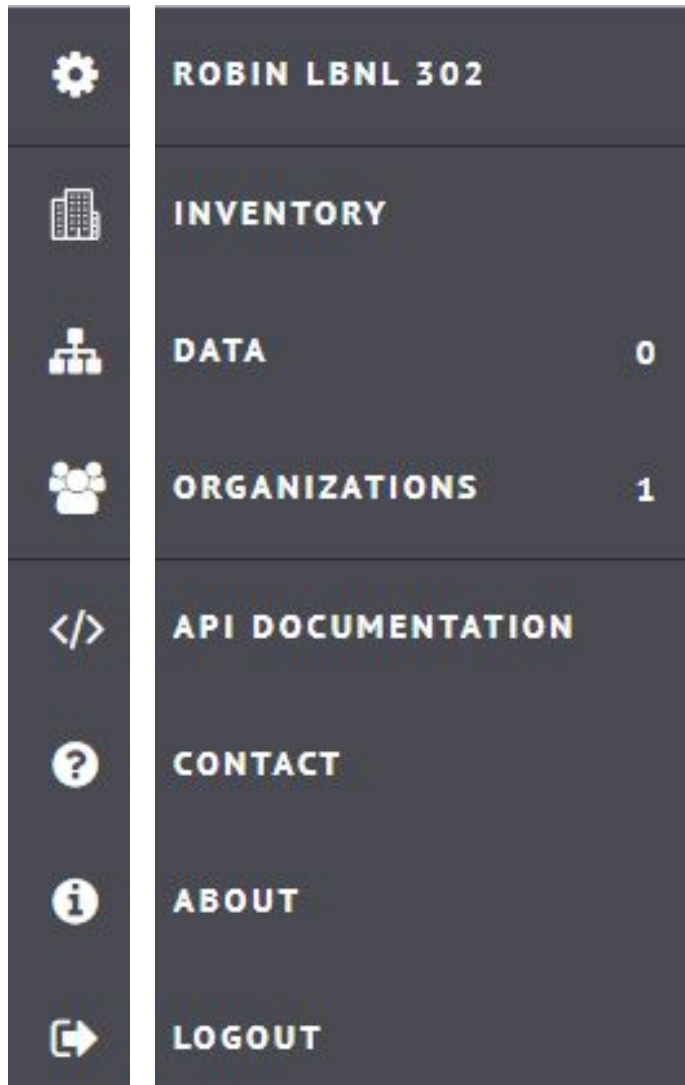
Click to Expand and Contract the Navigation Side Bar



Organization

contracted

expanded



**User Account Name:** Click to view information about the account

**Inventory:** Click to view of the Tax Lot / Parcel and Property / Building data, by Cycle / Time Period

**Data:** Click to import data into SEED that will become records in the Inventory

**Organizations:** Click to view the organizations associated with the user account

**API Documentation:** Click to view the Swagger API documentation

**Contact:** Click to view SEED contact info, including a link to user documentation and the User and Developer Forums, and a link to the Github code repository

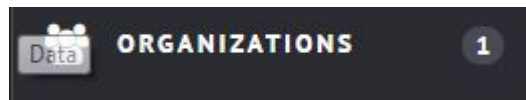
**About:** Click to view information about SEED development and funding

**Log out:** Click to log out of the program

# Create Cycle in Organizations (before uploading data)

At least one cycle must be defined before importing data.

To define a new cycle, go to the Organizations navigation bar to see the organizations that you manage and belong to.



Click on the Organization that you want to make a cycle for

ORGANIZATION NAME	NUMBER OF PROPERTIES	NUMBER OF TAX LOTS	YOUR ROLE	ORGANIZATION OWNER(S)
LBNL 302			owner	Robin LBNL 302

The program will open up a view of that Organization.

MEMBER NAME	MEMBER EMAIL	MEMBER ROLE
Robin LBNL 302	rdmitchell+302@lbl.gov	owner

Click on the “Cycles” link to view and edit existing cycles, and define new cycles

# View, Edit and Create Cycles

SEED PLATFORM™ LBNL 302 +

Organizations LBNL 302

Settings Sharing Column Settings Column Mappings Data Quality Cycles Labels Sub-Organizations Members

Click on **Cycles** link to view the **Cycles** page

To make a new **Cycle**, enter the **Cycle name**, **From date** and **To date**, then click **Create Cycle**

Organizations LBNL 302

Settings Sharing Column Settings Column Mappings Data Quality Cycles Labels Sub-Organizations Members

Create new cycle

Cycle Name

From date: [ ] [ ]

To date: [ ] [ ]

Create Cycle

Existing Cycles

NAME	FROM DATE	TO DATE	
2017 Compliance Cycle	01-01-2017	12-31-2017	edit

There is a default Cycle provided by the program called **2017 Calendar Year**

The new **Cycle** is added to the **Existing Cycles** list

Click **Edit** to change the default **Cycle** name if desired

Existing Cycles

NAME	FROM DATE	TO DATE	
2017 Calendar Year	01-01-2017	12-31-2018	edit
2018 Compliance Cycle	01-01-2017	12-31-2017	edit

Existing Cycles

NAME	FROM DATE	TO DATE	
2017 Compliance Cycle	01-01-2017	12-31-2017	edit
2018 Compliance Cycle	01-01-2017	12-31-2017	edit



# Uploading Data - There are many ways to start

OR click the “+” icon at the and then select “Data Set”

The screenshot displays the SEED Platform™ interface. On the left is a dark sidebar with navigation links: INVENTORY, DATA (with a '0' next to it), ORGANIZATIONS (with a '1' next to it), API DOCUMENTATION, CONTACT, ABOUT, and LOGOUT. The top header shows 'ROBIN LBNL 302', a menu icon, 'SEED PLATFORM™', and a user profile 'LBNL 302' with a '+' icon. Below the header are navigation buttons for 'Inventory', 'Data', and 'Contact'. A central banner features the text 'Getting Started' and a paragraph: 'The DOE developed the Standard Energy Efficiency Data (SEED) Platform™ as a free software tool that provides a standardized format for collecting, storing and analyzing building energy performance information about large portfolios. Upload your buildings list to get started.' Below this text are two buttons: 'Upload your buildings list' (blue) and 'Getting Started Guide' (orange). A white callout box points to the 'DATA' link in the sidebar with the text: 'Click the Data navigation button to see existing Data Sets or create a new one'. Another callout box points to the '+' icon in the top right with the text: 'OR click the “+” icon at the and then select “Data Set”'. A third callout box points to the 'Upload your buildings list' button with the text: 'OR click the blue button labeled “Upload your buildings list”'. At the bottom of the main content area, there is a section titled 'Highlights of SEED Platform™'.

OR  
click the blue button labeled “Upload your buildings list”

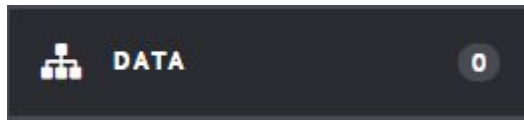


DATA

0

# Create a New Data Set

Clicking the Data Navigation option will open the Data Sets view, to display existing Data Sets and create new Data Sets



0 Data Sets					<a href="#">Create new data set</a>
DATA SET NAME	# OF FILES	LAST CHANGED	CHANGED BY	ACTIONS	

Click the **Create new data set** link to open this dialog box

Give the new data set a name

Click the Create Data Set button

Create a New Data Set.

**Data Set Name**

# Add a file to the data set

Select the data file type, either

**Upload a Spreadsheet**  
(CSV, XLS, XLSX)  
to import

- Tax / Parcel lists
- Building lists

**Upload Portfolio Manager Data**  
(CSV, XLS, XLSX)  
to import

- Custom Report files generated from Portfolio Manager

**Import Portfolio Manager Data to**

- Log in to your Portfolio Manager account and import the custom report template directly into SEED

**Upload BuildingSync Data**

- This option allows importing a BuildingSync (XML format) file, such as produced by Asset Score.

Upload your data.

Time Period: 2016 Compliance  
Manage available cycles.

Upload a Spreadsheet

Upload Portfolio Manager Data

Import Portfolio Manager Data

Upload BuildingSync Data

File types supported: .csv, .xls, .xlsx, and .xml.

**Note:** only the first sheet of multi-sheet Excel files will be imported.

2018 Compliance Cycle

2017 Compliance Cycle

2018 Compliance Cycle

Select a **Cycle** (time period) to associate with the data

Click "**Manage available cycles**" to go to the Cycle definition page

A browser window will open to select a file to upload

In this example, a **Tax Lot / Parcel** data file is uploaded

example-data-taxlots.xlsx

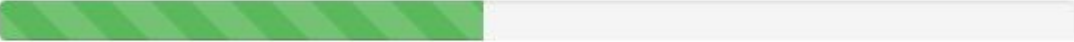


# Upload Data

During the data upload, SEED reports the progress and the success of the upload

Upload your data.

Uploading **example-data-taxlots.xlsx**



45% saving data

Dismiss

Successful upload!

**example-data-taxlots.xlsx** has been uploaded to **2018 Benchmarking Compliance**.

Continue to data mapping

Dismiss

When the data upload is complete, click the **“Continue to data mapping”** button

After you click the **“Continue to data mapping”** button, you may see a spinning circle if the data file is large



# Mapping Fields

## Matching Fields:

SEED matches records between files (such as Tax Lot and Building lists and ENERGY STAR Portfolio Manager data) based on the matching fields so it is **very important** to map your data's fields to at least one of these SEED fields.

*Pick a field that is common between the files you plan to merge and pair to each other*

Directions for mapping data are at the top of the Mapping page in the STEP 1 tab.

The Matching fields are

- **Jurisdiction Tax Lot ID** (Tax Lot table)
- **PM Property ID** (Portfolio Manager ID) (Property table)
- **Custom ID** (Property and/or Tax Lot table)
- **Address Line 1** (Property and/or Tax Lot table)
- **UBID** (Unique Building ID) (Property table)

< 2017 Compliance

Data Mapping and Validation (1 - example-data-taxlots-...

STEP 1: Map Your Data

STEP 2: Review Your Data Mappings

BEDES

Collapse Tabs

## MAPPING YOUR DATA TO SEED

It is necessary to map your field names to SEED field names. You can select from the list that appears as you start to type, which is based on the Building Energy Data Exchange Specification (BEDES), or you can type in your own name, as well as typing in the field name from the original datafile.

In addition, you need to specify where the field should be associated with Tax Lot data or Property data. This will affect how the data is matched and merged, as well as how it is displayed in the Inventory view.

**Field names for matching:** The following fields are used by SEED to match records: **Jurisdiction Tax Lot ID**, **PM Property ID**, **Custom ID 1**, **Address Line 1**, and **UBID**. If there are fields in a datafile mapped to these names, the program will attempt to match on those same names in existing records.

For Portfolio Manager files, SEED has a default set of field names which can be used without extra user editing unless desired.

When you click the **Map Your Data** button, the program will show a grid with the new field names as the column headings and your data in the rows. In that view, you can still come back to the initial mapping screen and change the field mapping.

### Duplicate

-- if fields are marked as duplicates they need to be resolved to have different names.

The **Collapse Tabs** option is useful if you already know all the matching rules and need more room to view the mapped fields





# Mapping Fields

The fields in a data file can be mapped

- All to the same table (either Tax Lot or Property)
- To different tables
  - In the example below, mapping to both tables defines the relationship between the Property and the Tax Lot data with **matching fields**.

Building List					
UBID	Jurisdiction Tax Lot ID	Lot Owner	Gross Floor Area	Parcel Area	Building Owner
123	13234	Williams	25000	55000	Chen
256	33423	Smith	40000	75000	Fowler
535	33423	Smith	10000	75000	Hilgard

Map to Tax Lot table

Map to Property table

Tax Lot table		
Jurisdiction Tax Lot ID	Lot Owner	Parcel Area
13234	Williams	55000
33423	Smith	75000

Property table		
UBID	Gross Floor Area	Building Owner
123	25000	Chen
256	40000	Fowler
535	10000	Hilgard

Tax-Lot Property Join table	
Jurisdiction Tax Lot ID	Unique Building ID
13234	123
33423	256
33423	535



# Mapping Fields

The program will make a guess at an appropriate field name, which is not always correct or desired. The field names can get changed to another name if desired or you can click on this button to map all the SEED fields to the fields in the imported file

This data is all from the Tax Assessor so all the fields are mapped to the Tax Lot table

Map the field names in the **imported file** to standardized field names in the **SEED database**

Map SEED fields to imported file fields

SEED example-data-taxlots.xlsx

Set all fields to: Tax Lot

Mapped Fields

INVENTORY TYPE	SEED HEADER	MEASUREMENT UNITS	DATA FILE HEADER	ROW 1	ROW 2
Tax Lot	Jurisdiction Tax Lot ID		Parcel Number	1552813	11160509
Tax Lot	Address Line 1		Address	050 Willow Ave SE	2655 Welstone Ave NE
Tax Lot	City		City	Rust	Rust
Tax Lot	Number of Buildings		Number of Buildings	1	2
Tax Lot	Taxable SF		Taxable SF	292029	390289
Tax Lot	Tax Class		Tax Class	4	4
Tax Lot	Parcel Owner		Parcel Owner	Howard Mills	Ron Willard
Tax Lot	Notes		Notes	University Inn is on this parcel	Hilltop Condos, Hilltop

Map Your Data

Start typing in the SEED field input to see a list of fields containing that word

SEED HEADER

jurisdiction

- Jurisdiction Tax Lot Id
- Jurisdiction Property Id

These fields were mapped to the reserved Matching field names to specify the fields the program will use to match records in files

- Parcel Number ⇒ **Jurisdiction Tax Lot ID**
- Address ⇒ **Address Line 1**

### Matching

- In this case, the program will match two records if the data in either the **Jurisdiction Tax Lot ID** field **OR** the **Address Line 1** field are the same

# Mapping Fields

Mapping buildings for **example-data-taxlots.xlsx**

100% Complete

Click **Map Your Data** when all the fields are mapped as desired

Map SEED fields to imported file fields
Map Your Data

SEED		example-data-taxlots.xlsx			
Set all fields to: <span>Tax Lot</span>		Mapped Fields			
INVENTORY TYPE	SEED HEADER	MEASUREMENT UNITS	DATA FILE HEADER	ROW 1	ROW 2
<span>Tax Lot</span>	Jurisdiction Tax Lot ID		Parcel Number	1552813	11160509
<span>Tax Lot</span>	Address Line 1		Address	050 Willow Ave SE	2655 Welstone Ave NE
<span>Tax Lot</span>	City		City	Rust	Rust
<span>Tax Lot</span>	Number of Buildings		Number of Buildings	1	2
<span>Tax Lot</span>	Taxable SF		Taxable SF	292029	390289
<span>Tax Lot</span>	Tax Class		Tax Class	4	4
<span>Tax Lot</span>	Parcel Owner		Parcel Owner	Howard Mills	Ron Willard
<span>Tax Lot</span>	Notes		Notes	University Inn is on this parcel	Hilltop Condos, Hilltop

Some of the non-matching field names are changed from the default program suggestions

For "Number of Buildings", SEED suggested "Number Properties" but this was changed back to "Number of Buildings" for the final mapping (by just typing the complete field name in the SEED Header input box)

# Field Mapping Review

Map Your Data

View the mapped fields populated with the data

Click **Save Mappings** if the mapping is correct

You can click **Back to Mapping** if it is not correct

Click **Data Quality Results** to see data errors (see next page)

It is possible to filter and sort the data by field in this view

SEED displays the number of records → 9 tax lots

Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	City (Tax Lot)	Notes	Parcel Owner	Tax Class	Taxable Sf	Number Of Buildings
1552813	050 Willow Ave SE	Rust	University Inn is on this parcel	Howard Mills	4	292029	1
11160509	2655 Welstone Ave NE	Rust	Hilltop Condos, Hilltop Retail, Hillt...	Ron Willard	4	390289	2
13334485	93029 Wellington Blvd	Rust	Lucky University on this parcel	University Trust	5	1234560	
23810533	94000 Wellington Blvd	Rust	Lucky University on this parcel	University Trust	2	5312	
24651456	11 Ninth Street	Rust	Lucky University on this parcel	University Trust	2	45135	5
33366125	525 Elm Street	Rust	Montessori school on this tax lot	Susan Anthony	3	954652	
33366148	530 Elm Street	Rust	Montessori school on this tax lot	Heidi Folk	1	154623	
33366555	521 Elm Street	Rust	Montessori school on this tax lot	Buildings LLC	9	15213	
55039309	39929 Ranch 99 Road	Rust		Ward Thatcher	7	331235	

Back to Mapping


Data Quality Results

Save Mappings

View by Tax Lot

Back to Mapping

From the **Data Mapping** screen, click **Data Cleansing Results** to see what the program discovered about the data

14  Data Quality Results

## Data Quality Results

File Name:

example-data-taxlots.xlsx

Date Uploaded:

February 8th 2018, 7:26:40 PM -08:00


ADDRESS LINE 1	JURISDICTION TAX LOT ID	PM PROPERTY ID	CUSTOM ID	FIELD	ERROR MESSAGE
Address Line 1	Jurisdiction Tax Lot ID	PM Property ID	Custom ID	Field	Error Message
93029 Wellington Blvd	13334485	--	--	Number Of Buildings	Number Of Buildings is required and is None
94000 Wellington Blvd	23810533	--	--	Number Of Buildings	Number Of Buildings is required and is None
94000 Wellington Blvd	23810533	--	--	Taxable Sf	Taxable Sf [5312] < 10000
525 Elm Street	33366125	--	--	Number Of Buildings	Number Of Buildings is required and is None
530 Elm Street	33366148	--	--	Number Of Buildings	Number Of Buildings is required and is None
521 Elm Street	33366555	--	--	Number Of Buildings	Number Of Buildings is required and is None
39929 Ranch 99 Road	55039309	--	--	Number Of Buildings	Number Of Buildings is required and is None

Click **Export** to export the contents of the Data Cleansing screen to a CSV file

Export

Close

Click **Close** to return to the **Data Mapping** Screen

 Data Cleansing Results.csv





# Mapping – Confirm and Start Matching

Save Mappings

Confirm Save Mappings?

Did you review your mappings? It's a good idea to double check your mappings. Once SEED matches your properties and tax lots you cannot undo or edit these mappings.

Confirm mappings & start matching

Dismiss

You have one more chance to review the mapping

Click **Confirm mappings and start matching** if you are happy with the data mapping

SEED will check to see if any records match within the file (or across other files if they have already been imported)

Finding inventory matches.

Finding inventory matches for **example-data-taxlots.xlsx**

0% Complete

Dismiss

Program checks to see if any records match within the file based on the matching fields set in Mapping, such as Address or Tax Lot ID

The program checks for matching even if there is no data already loaded into the program to match to, in case there are matches within the file being imported



# Matching - View Results / Add a File

Load More Data

- Total rows in the import file: 9
- New tax lots: 9

SEED could not locate any existing matches. Would you like to add another file?

Add another file

View my properties

Dismiss

The program reports on what was done with the records. In this case, the program imported 9 records and created 9 new records in the Tax Lot table from those imported records

Click **Add another file** to upload another data file, such as ENERGY STAR Portfolio Manager data, which allows you to add more data to match to the records that were just created

Click **View my properties** to see the Inventory list

Upload your data.

Time Period: 2016 Compliance  
Manage available cycles.

Upload a Spreadsheet

Upload Portfolio Manager Data

Import Portfolio Manager Data

Upload BuildingSync Data

Cycle: 2018 Compliance Cycle

View by Property | **View by Tax Lot** | 9 tax lots

		Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	City (Tax Lot)	Taxable Sf	Tax Class
✓	i	24651456	11 Ninth Street	Rust	45135	2
✓	i	33366148	530 Elm Street	Rust	154623	1
✓	i	23810533	94000 Wellington Blvd	Rust	5312	2
✓	i	33366555	521 Elm Street	Rust	15213	9
✓	i	33366125	525 Elm Street	Rust	954652	3

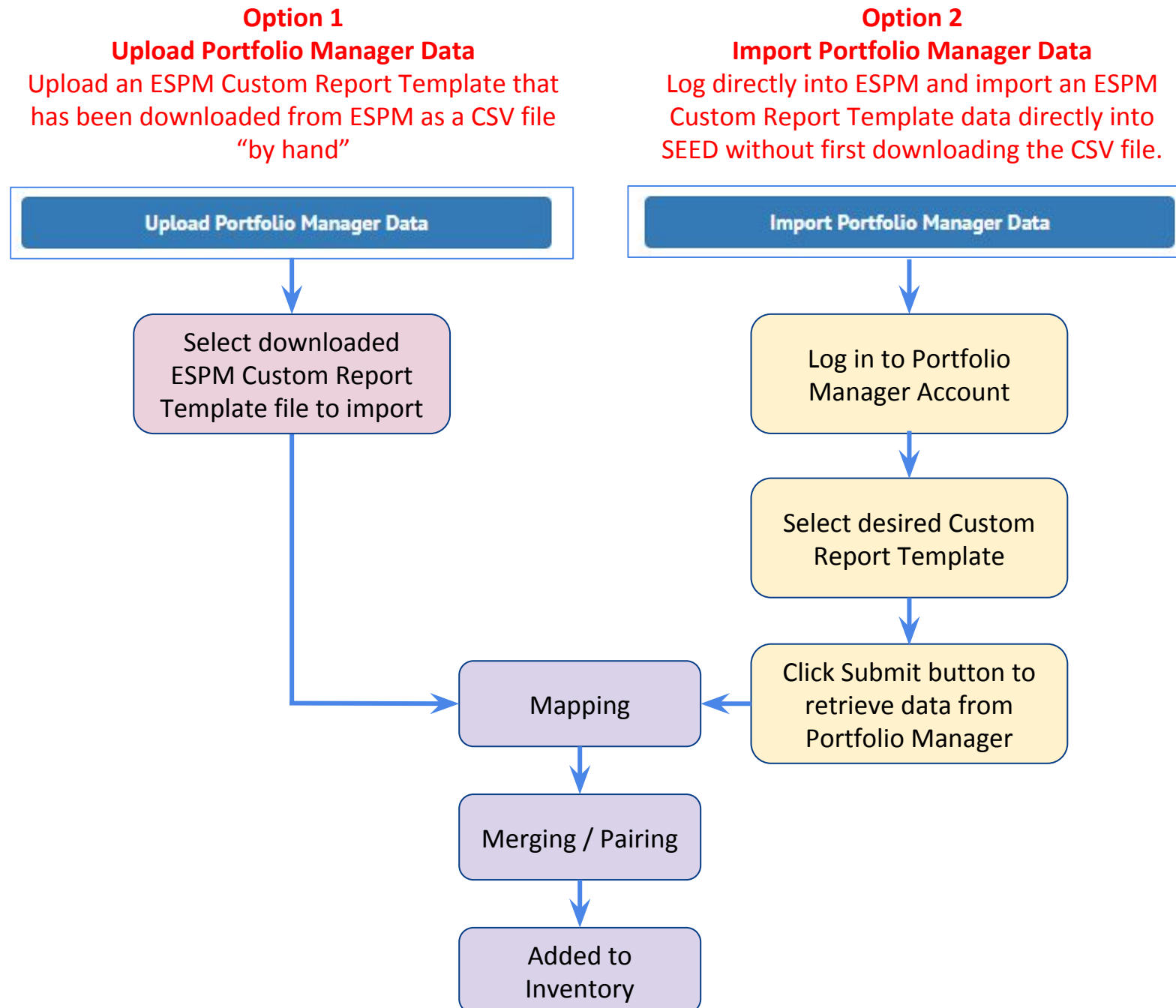
After a data file has been mapped and matched, the records can be viewed in the Inventory list view.

In this example, **Tax Lot** data was imported, so the data can be viewed in the View by Tax Lot tab, for the appropriate **Cycle**



# ENERGY STAR Portfolio Manager (ESPM) Data

## Two paths for obtaining ENERGY STAR Portfolio Manager (ESPM) data





# ESPM Option 1: Upload Data from ESPM CSV files


This example shows how to upload Portfolio manager data from Custom Report Template CSV text files that have been downloaded from Portfolio Manager

Upload your data.

Time Period  Manage available cycles.


- Select the appropriate Cycle
- Click the **Upload Portfolio Manager Data** button to upload an ESPM Custom Report Template that has been exported from ESPM as a CSV file

Browse to the appropriate file to upload to SEED

 example-data-ESPM.xlsx

Upload your data.

Uploading **example-data-properties.xlsx**



45% saving data

Successful upload!

**example-data-ESPM.xlsx** has been uploaded to **2018 Benchmarking Compliance**.

Click **Continue to data mapping**  
(See Mapping Portfolio Manager Data)

# ESPM Option 2: Import Data Directly from ESPM

This example shows how to import Portfolio manager data from Custom Report Template directly by logging into a Portfolio Manager account from SEED

1 - Select the appropriate Cycle

Upload your data.

Time Period: 2018 Compliance Cycle

Manage available cycles.

2 - Click the **Upload Portfolio Manager Data** button to upload an ESPM Custom Report Template that has been exported from ESPM as a CSV file

**Upload Portfolio Manager Data**

3 - Enter Portfolio Manager Username and Password

Portfolio Manager Import

Portfolio Manager Username: Portfolio\_Manager\_User\_ID

Portfolio Manager Password: .....

Get Report Templates

Report Template Name: ▼

Submit

4 - Click **Get Report Templates** button

Portfolio Manager Import

Portfolio Manager Username: SEED\_City\_Test

Portfolio Manager Password: .....

Get Report Templates

Report Template Name: ▼

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

5 - Select the desired Report Template

Portfolio Manager Import

Portfolio Manager Username: SEED\_City\_Test

Portfolio Manager Password: .....

Get Report Templates

Report Template Name (11): SEED City Test Report

Submit

6 - Click **Submit** to continue to data Mapping



# Mapping Portfolio Manager Data

## SEED field mapping for a Portfolio Manager file

Map all the fields to the Property Table except if there is a Tax Lot / Parcel ID -- map that to the Tax Lot table

### UBID

- **Matching field - Property table**
- Use for a Unique Building ID, if that field is in the ESPM data

### PM Property ID

- **Matching field - Property table**
- Map to **Property ID** in PM file

### PM Parent Property ID

- Map to **Parent Property ID** in PM file to define the campus relationship

### Address Line 1

- **Matching field - Property table**
  - If you want to match on Address, map to Address Line 1.
  - If you don't want to match on Address, use the ESPM field name of "Address 1"

### Jurisdiction Tax Lot ID

- **Matching Field - Tax Lot table**
- If there is a Tax Lot ID field in the Portfolio Manager data that can be used to set up the relationship between Tax Lot and Property, map it to Jurisdiction Tax Lot ID
- Set the field to the **Tax Lot** table

Map SEED fields to imported file fields

SEED example-data-ESPM.xlsx

Mapped Fields Set all fields to:

SEED HEADER	DATA FILE HEADER	INVENTORY TYPE	ROW 1
Ubid	Unique Building ID	Property ▼	1
Pm Property Id	Property ID	Property ▼	2264
Pm Parent Property Id	Parent Property ID	Property ▼	
Property Name	Property Name	Property ▼	University Inn
Address Line 1	Address 1	Property ▼	50 Willow Ave SE
Jurisdiction Tax Lot Id	Tax Lot ID	Tax Lot ▼	1552813
Property Type	Property Type	Property ▼	Hotel



# Mapping Review - Portfolio Manager

Click **Data Cleansing results** button to view the errors or warnings.

Click **Save Mappings** if mapping is correct

[← Back to Mapping](#)

16 2 Data Quality Results

[Save Mappings](#)

14 properties

View by Property

PM Property ID	PM Parent Property ID	UBID	Address Line 1 (Proper...	City (Property)	Associated Tax Lot ID	Property Name	Gross Floor Area	ENERGY STAR Score
1154623		4	2700 Welstone Ave NE	Rust	11160509	Hilltop Retail	23543	63
1311523	1311523	6	11 Ninth Street	Rust	24651456	Lucky University		
1311524	1311523	7	12 Ninth Street	Rust	24651456	Grange Hall	124523	77
1311525	1311523	11	20 Tenth Street	Rust	24651455	Biology Hall	421351	43
1311526	1311523	8	35 Tenth Street	Rust	24651456	Rowling Gym	1234	59
1311527	1311523	9	93029 Wellington Blvd	Rust	13334485;23810533	East Computing Hall	45324	34
1311528	1311523	12	93031 Wellington Blvd	Rust	13334485;23810533	International House	482215	
2264		1	50 Willow Ave SE	Rust	1552813	University Inn	12555	
2264							12555	75
3020139							513852	1

**Data Quality Results**

File Name: example-data-ESPM.xlsx

Date Uploaded: February 9th 2018, 2:51:27 PM -08:00

ADDRESS LINE 1	JURISDICTION TAX LOT ID	PM PROPERTY ID	CUSTOM ID	FIELD	ERROR MESSAGE
Address Line 1	Jurisdiction Tax Lot ID	PM Property ID	Custom ID	Field	Error Message
50 Willow Ave SE	--	2264	--	Site EUI	Site EUI [3.0] < 10.0
2700 Welstone Ave NE	--	1154623	--	Site EUI	Site EUI [1202.0] > 1000.0
2655 Welstone Ave NE	--	3020139	--	ENERGY STAR Score	ENERGY STAR Score [1] < 10



# Confirm Mapping and Start Matching

## Confirm Save Mappings?

Did you review your mappings? It's a good idea to double check your mappings. Once SEED matches your properties and tax lots you cannot undo or edit these mappings.

You have one more chance to review the mapping

Confirm mappings & start matching

Dismiss

Click **Confirm mappings and start matching** if you are happy with the data mapping

SEED will check to see if any records match (based on the Matching fields defined in Mapping) within the file (or across other files if they have already been imported)

## Finding inventory matches.

Finding inventory matches for **example-data-properties.xlsx**



100% Complete

### Matching Results for file example-data-ESPM.xlsx

- Total rows in the import file: 14
- New properties: 12
- New tax lots: 2
- Merged properties: 1
- Merged tax lots: 8
- Ignored tax lot duplicates within the import file: 8

Program checks to see if any records match within the file (such as Address Line 1 or Tax Lot ID)

In this example, using the Sample data, the **matching field** that is common between the two data files, Tax Lot data and the Portfolio Manager data is **Address Line 1**.

The program reports the results of the matching.

Add another file

View my properties

Dismiss

**Add another file** takes you back to the **Upload Your Data** dialog box.

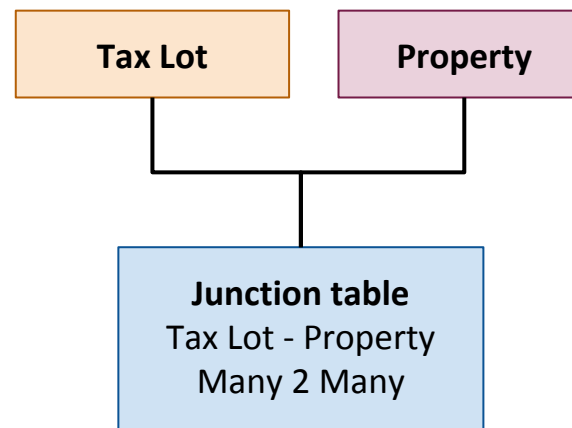
**View my properties** takes you **Inventory List** view



# Hand Pairing Tax Lot and Property records

## Pairing records between Tax Lot and Property tables

- Records are “paired” between Tax Lot and Property tables in the Junction table based on matching fields



Viewing and changing the data pairing is in the Data Import view

Data Sets		2018 Compliance Year (2017 Data)			Add more data files	
DATA FILES		DATE IMPORTED	# OF RECORDS	CYCLE	DATA MAPPING	DATA PAIRING
example-building-List.xlsx		02/02/2018 04:38:06 PM	11	2018 Compliance Year (2017 Data)	<a href="#">Data Mapping</a>	<a href="#">Data Pairing</a>



# Hand Pairing Tax Lot and Property records

In the Data Sets view, for any imported file, click the Data Pairing button to view the automatic pairing or changing the pairing (pair or unpair records) by hand

**Data Pairing** Select the Cycle for the desired data

**View options**

- Show All
- Show Paired
- Show Unpaired

Click Pairing Settings to select the fields to display for both tables

Uncheck this X to unpair the records

Select table to view on the left hand side; the other table will display on the right hand side

Property

ADDRESS LINE 1 (PROPERTY)	PM PROPERTY ID	PAIRED
20 Tenth Street	1311525	1
2660 Welstone Ave NE	4828379	1
521 Elm Street	5233255	3
295444 Moser Lane	6798444	
2700 Welstone Ave NE	1154623	1
93029 Wellington Blvd	1311527	2
93031 Wellington Blvd	1311528	2
12 Ninth Street	1311524	
35 Tenth Street	1311526	1
11 Ninth Street	1311523	1
50 Willow Ave SE	2264	1
295302 Moser Lane	6798215	
2655 Welstone Ave NE	3020139	1

Showing 13 Properties (3 unpaired)

Tax Lot

ADDRESS LINE 1 (TAX LOT)	JURISDICTION TAX LOT ID	
11 Ninth Street	24651456	
35 Tenth Street	1311526	X
11 Ninth Street	1311523	X
530 Elm Street	33366148	
521 Elm Street	5233255	X
94000 Wellington Blvd	23810533	
93029 Wellington Blvd	1311527	X
93031 Wellington Blvd	1311528	X
521 Elm Street	33366555	
521 Elm Street	5233255	X
525 Elm Street	33366125	
521 Elm Street	5233255	X
050 Willow Ave SE	1552813	
50 Willow Ave SE	2264	X
93029 Wellington Blvd	13334485	
93029 Wellington Blvd	1311527	X
93031 Wellington Blvd	1311528	X
39929 Ranch 99 Road	55039309	
Drag Property here to pair with this Tax Lot		
2655 Welstone Ave NE	11160509	
2660 Welstone Ave NE	4828379	X
2700 Welstone Ave NE	1154623	X
2655 Welstone Ave NE	3020139	X
	24651455	
20 Tenth Street	1311525	X

Showing 11 Tax Lots (2 unpaired)

Unpaired property records

Unpaired Tax Lot record

Tax Lot record

Property records paired to the Tax Lot record





# Hand Pairing Tax Lot and Property records

The Pairing Settings view allows you to select the fields from each table (Property and Tax Lot) to view in the Pairing screen

Check the fields to view for each table

Only the fields mapped to the specific table will be shown for each table

### Pairing Settings

Pairing Pairing Settings

Column Order/Visibility

There are 55 property columns and 17 tax lot columns of data available to you.  
Select columns from the lists below to make them appear on the properties and tax lots of your Matching List table.  
Drag the rows to change the order in which they appear.

#### Properties

<input type="checkbox"/>	Column Name	
<input checked="" type="checkbox"/>	Address Line 1 (Property)	
<input checked="" type="checkbox"/>	PM Property ID	
<input type="checkbox"/>	Custom ID 1 (Property)	
<input type="checkbox"/>	PM Parent Property ID	
<input type="checkbox"/>	Jurisdiction Property ID	
<input type="checkbox"/>	UBID	
<input type="checkbox"/>	Address Line 2 (Property)	
<input type="checkbox"/>	City (Property)	
<input type="checkbox"/>	State (Property)	
<input type="checkbox"/>	Postal Code (Property)	

#### Tax Lots

<input type="checkbox"/>	Column Name	
<input checked="" type="checkbox"/>	Address Line 1 (Tax Lot)	
<input checked="" type="checkbox"/>	Jurisdiction Tax Lot ID	
<input type="checkbox"/>	Custom ID 1 (Tax Lot)	
<input type="checkbox"/>	Address Line 2 (Tax Lot)	
<input type="checkbox"/>	City (Tax Lot)	

# Main Screen - List Views

- **Cycle:** Select the Cycle data is associated with
- **Tabs:** View by Property and View by Tax Lot

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**Properties**

Properties List | List Settings | Reports

Select **Actions** to act on records

Select the Cycle

Two tabs

- Property
- Tax Lots

Controls the fields displayed in the tab

Number of Property records for this cycle

13 properties

PM Property ID	Jurisdiction Tax Lot ID (↔)	Address Line 1	Property Name	Property Type	Gross Floor Area	ENERGY STAR Score
1311527	13334485; 23810533	93029 Wellington Blvd	East Computing Hall	College/University	45324	34
1311523	24651456	11 Ninth Street	Lucky University	College/University		
1311526	24651456	35 Tenth Street	Rowling Gym	Fitness Center/Health ...	1234	59
2264	1552813	50 Willow Ave SE	University Inn	Hotel	12555	75
5233255	33366125; 33366148; ...	521 Elm Street	Montessori Day School	K-12 School	200000	55

Click + to see related records from the other tab

Toggle checkmark on and off to select records for **Actions**

Click on **i** to go to Detailed record view

This icon will link to Notes for the record

# Property & Tax Lots - List View

## View by Property

Select the **Cycle** for the data to view

**PM Property ID** can be pinned to the left side of the grid

Click the + icon to "expand" the view to show data from the associated Tax Lots

"Collapsed" view shows all associated records from the tax lot table separated by semicolons

Cycle: 2018 Compliance Cycle		View by Property		View by Tax Lot		13 properties	
		PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Property)	Address Line 1 (Tax Lot)	Property Type	ENERGY STAR Score
		5233255	33366125; 33366148; ...	521 Elm Street	521 Elm Street; 525 EL...	K-12 School	55
			33366148		530 Elm Street		
			33366555		521 Elm Street		
			33366125		525 Elm Street		
		6798215		295302 Moser Lane		Library	88

## View by Tax Lot

Select the **Cycle** for the data to view

**Jurisdiction Tax lot ID** can be pinned to the left side of the grid

Click the + icon to "expand" the view to show data from the associated Property (in this case Portfolio Manager) records

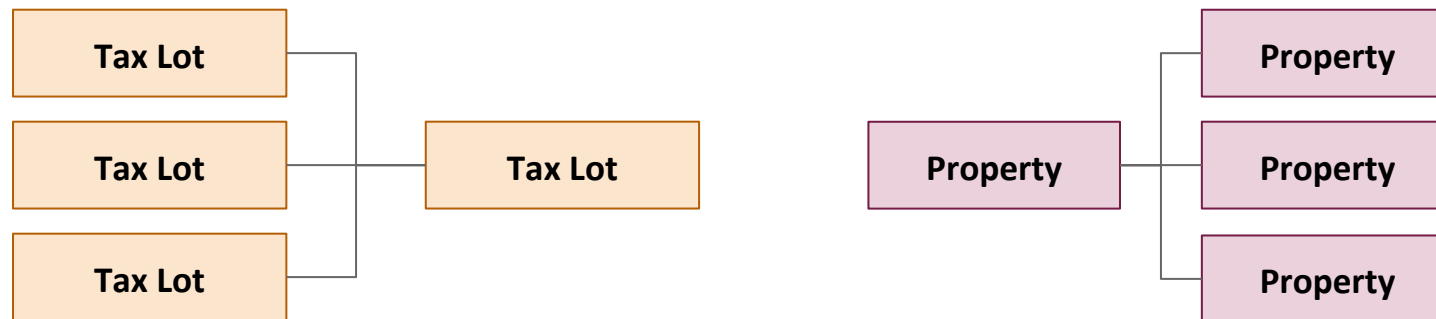
"Collapsed" view shows all associated records from the property table separated by semicolons

Cycle: 2018 Compliance Cycle		View by Property		View by Tax Lot		11 tax lots	
		Jurisdiction Tax Lot ID	PM Property ID	Address Line 1 (Tax Lot)	Address Line 1 (Property)	Taxable Sf	Tax Class
		24651455	1311525		20 Tenth Street		
		24651456	1311523; 1311524; 13...	11 Ninth Street	11 Ninth Street; 12 Ninth S...	45135	2
			1311523		11 Ninth Street		
			1311526		35 Tenth Street		
			1311524		12 Ninth Street		
		33366125	5233255	525 Elm Street	521 Elm Street	954652	3
		33366148	5233255	530 Elm Street	521 Elm Street	154623	1

# Hand Merging / Pairing Records

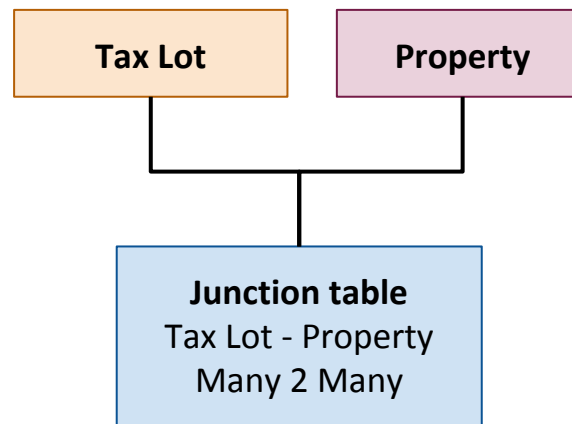
## Merging (matching):

- Records are merged within the same table (Tax Lot or Property) based on matching fields



## Pairing:

- Records are “paired” between Tax Lot and Property tables in the Junction table based on matching fields



# Hand Merging Records

## Merging

The hand merging functionality is in the **Inventory List** view

It is possible to merge two records together if the program didn't automatically merge them

Actions Filter by label: Add a label

- Merge Selected
- Delete Selected
- Export Selected
- Add/Remove Labels
- Data Quality Check
- Only Show Populated Columns

PM Property ID	Address Line 1
1311523	11 Ninth Street
1311524	12 Ninth Street

Step 2: Select the **Merge Selected** Action

Step 1: In Inventory List view Select records to hand merge (by clicking on the checkmark to the left of the record)

Step 3: Reorder the records if needed for final merge result

Merge Multiple Properties

**Resulting Merge**

Address Line 1	City	ENERGY STAR Score	Gross Floor Area	Owner
12 Ninth Street	Rust	77	124523	Lucky University

Records will be merged together from bottom to top, with the top record having the highest priority. Drag to reorder.

Address Line 1	City	ENERGY STAR Score	Gross Floor Area	Owner
12 Ninth Street	Rust	77	124523	Lucky University
11 Ninth Street	Rust			Lucky University

Cancel Merge

Step 4: You will now see only the one Master record in the Inventory List view

View by Property View by Tax Lot

PM Property ID	Address Line 1
1311524	12 Ninth Street
1311525	20 Tenth Street
1311526	35 Tenth Street
2264	50 Willow Ave SE



# Hand Un-Merging Records

Merged records can be viewed in the Inventory Detail view

It is possible to un-merge records (one at a time) in the **Inventory Detail** view

These two records were merged automatically by the program into one Master record

Property Detail

Property : 12 Ninth Street

Labels: > 50,000 SF College/University

Cycle: 2018 Compliance Cycle

Unmerge Last

FIELD	MASTER	EXAMPLE-DATA-ESPM.XLSX	EXAMPLE-DATA-ESPM.XLSX
PM Property ID	1311524	1311524	1311523
Address Line 1	12 Ninth Street	12 Ninth Street	11 Ninth Street
Property Name	Grange Hall	Grange Hall	Lucky University
		Rust	Rust

Unmerge Properties

Are you sure you want to unmerge these properties?

Cancel Confirm

Unmerging will make these records into two separate records in the Inventory List view

View by Property View by Tax Lot

	PM Property ID	Address Line 1	Jurisdiction Tax Lot ID (∞)
	1311523	11 Ninth Street	24651456
	1311524	12 Ninth Street	24651456

# Data Quality: Run from Inventory List

Step 2: Click the **Data Quality Check** option in **Actions**

Step 1: Check the records to run the **Data Quality** check on

Step 3: The **Data Quality Results** screen is displayed

Data Quality Results

JURISDICTION TAX LOT ID	PM PROPERTY ID	CUSTOM ID	FIELD	ERROR MESSAGE
Jurisdiction Tax Lot ID	PM Property ID	Custom ID	Field	Error Message
24651455	--	--	Address Line 1 (Tax Lot)	Address Line 1 (Tax Lot) is null
--	1154623	--	Site EUI	Site EUI [1202.0] > 1000.0
--	3020139	--	ENERGY STAR Score	ENERGY STAR Score [1] < 10
--	3020139	--	Gross Floor Area	Gross Floor Area [513852.0] > 50000.0
--	4828379	--	ENERGY STAR Score	ENERGY STAR Score is required and is None
--	4828379	--	Gross Floor Area	Gross Floor Area [55121.0] > 50000.0
--	4828379	--	Site EUI	Site EUI is required and is None
--	5233255	--	Gross Floor Area	Gross Floor Area [200000.0] > 50000.0
--	5233255	--	Site EUI	Site EUI [1358.0] > 1000.0
--	1311523	--	ENERGY STAR Score	ENERGY STAR Score is required and is None

Export Close

Labels are automatically added to the problem records. If those records are fixed and reimported, and the DQ check is rerun, the labels will be automatically removed if the program doesn't detect the data problem

The Data Quality Results can be exported to a CSV file

Data Quality Check Results.csv

	A	B	C	D	E	F	G
1	Table	Address Line 1	PM Property ID	Tax Lot ID	Field	Error Message	Severity
2	TaxLotState			24651455	Address Line 1 (Tax Lot)	Address Line 1 (Tax Lot) is null	error
3	PropertyState	2700 Welstone Ave NE	1154623		Site EUI	Site EUI [1202.0] > 1000.0	error
4	PropertyState	2655 Welstone Ave NE	3020139		ENERGY STAR Score	ENERGY STAR Score [1] < 10	error
5	PropertyState	2655 Welstone Ave NE	3020139		Gross Floor Area	Gross Floor Area [513852.0] > 50000.0	error
6	PropertyState	2660 Welstone Ave NE	4828379		ENERGY STAR Score	ENERGY STAR Score is required and is None	error
7	PropertyState	2660 Welstone Ave NE	4828379		Gross Floor Area	Gross Floor Area [55121.0] > 50000.0	error
8	PropertyState	2660 Welstone Ave NE	4828379		Site EUI	Site EUI is required and is None	error



# List Grid Functionality

The grid used in the Inventory List view has many features  
*(explained in detail on the following pages)*

- **Filter** -- enter filter criteria in the blank box under the column name
- **Sort** -- click in the middle of the column header to see the small up and down arrows to sort ascending and descending; alternatively select the right menu arrow in the column to see the Sort Ascending, Sort Descending and Remove Sort options
- **Select fields to view** -- click on the right menu arrow in an individual field to turn it on or off, or click on List Settings to see a list of columns to display or hide
- **Field order by dragging columns** -- click in the middle of a column header, hold the left mouse button down, and drag it right or left to place it the desired order
- **Pin columns** -- click on the right menu arrow in an individual column to see the Pin Left, Pin Right and Unpin options for that column
- **Resize columns** - click on the right hand side of the column header, hold the left mouse button down, and drag the column edge right and left to the desired width
- **Fixed column headers** -- the column headers are fixed, so scrolling down keeps the column headers visible.
- **Single page with all the data** -- All the records for a view are loaded at once -- there is no data view “pagination

# Filter

Filter by Label shows only labels that are applied to records

**Properties**

Properties List | List Settings | Reports

Actions ▾ **Filter by label:** Add a label

Cycle: 2018 Compliance Cycle

DQ: Low or No ENERGY STAR Score  
DQ: Low or No Site EUI

AND OR EXCLUDE Clear

View by Property | View by Tax Lot

		PM Property ID	Address Line 1 (Proper..	Site EUI	ENERGY STAR Score	Address Line 1 (Tax Lot)	Property Name
+	✓	3020139	2655 Welstone Ave NE	652.3	1	2655 Welstone Ave NE	Hilltop Condos
+	✓	1311527	93029 Wellington Blvd	45	34	93029 Wellington Blvd...	East Computing Hall

Can do AND, OR or EXCLUDE filters by label

Numeric fields can have expressions

Gross Floor Area ▲ ▾

>=25000,<100000 ✕

51764
51843
59188
61650
64123
67425
68177
71068
73993

Text columns can be filtered

Address Line 1 (Property) ▲ ▾

buchanan

30326 W Buchanan Lane
31553 S Buchanan Road
50518 SW Buchanan Lane
112019 S Buchanan Court
137291 SW Buchanan Highway
000023255 NW Buchanan Highway
000059001 NE Buchanan Way
0000224905 E Buchanan Loop

Enter values into the input boxes at the top of the field in order to filter the data by those values

The program will then only display the records with values based on the filter criteria

# Filter

The filter feature supports multiple filters separated by commas.

Building Address	Building Floor Area
<input type="text"/>	>10000,<200000
39929 Ranch 99 Road	23543
521 Elm Street	24523
93029 Wellington Blvd	45324
525 Elm Street	55121
050 Willow Ave SE	124523

Date strings can be either

- a year (2016)
- a year and a month (2016-05)
- a full date with no time (2016-05-31)

Text/Numeric Case-Insensitive Contains	abc 5
Text/Numeric Exact Match	"" "abc" = 5
Text/Numeric Not Exact Match	!= "" != "abc" != 5
Numeric Range	> 5 >= 5 < 5 <= 5
Text/Numeric Combination	123, street
Date Equality	2016 2016-05 2016-05-31 = 2016 = 2016-05
Date Inequality	!= 2015 != 2016-10-01
Date Range	>= 2016 < 2016-05
Date Combination	2016, >= 2016-10-01 >= 2015, < 2017



Most of the lists in SEED (Mapping, Matching, Inventory) allow you to sort and filter on the data in the columns by entering the filter values in the input box below the field (column name)

SEED supports filtering using “expressions” for both text and numeric data

- "" double quotes for null (empty) string
- !"" for non-null (non-empty) string
- Enter a value to show all records that contain that value: typing **condo** will show results for **CONDO** and **COMMERCIAL CONDO**
- Enter a value surrounded by double quotes (""") for an exact match (including case): typing **"CONDO"** will show results for only uppercase **CONDO**
- Operators: =, !=, <, <=, >, >= followed by a value
  - **>100** is greater than 100
  - **!0** is not equal to 0
- Multiple expressions should be separated by commas.
  - **>1984,<1990** is greater than 1984 and less than 1990

ENERGY STAR Score	Site EUI
>=50,<=75	>20
75	51.5
59	74.4
61	78.9
75	78.9
50	88.1
71	91.2

Add as many filters as needed, in this case the filter is show only records with ENERGY STAR Score data between 50 and 75, and with a Site EUI greater than 20

# Filter Using Labels

Multiple labels can be applied to the filter box and filter operators (AND, OR, and EXCLUDE) can be applied to the filter


- Filter Operators
  - AND == When filtering on multiple labels, displays records that have all the labels selected in the Filter by Label box
  - OR == When filtering on multiple labels, displays records that have at least one of the labels selected in the Filter by Label box
  - EXCLUDE == Displays all records that DO NOT have the label or labels in the Filter by Label box


Actions ▾ Filter by label: **DQ: Low or No ENERGY STAR Score** × Add a label **AND** OR EXCLUDE Clear Labels Clear Filters

Cycle: 2018 Compliance Cycle ▾ List Settings Profile: Property List View ▾

View by Property View by Tax Lot 4 properties

	PM Property ID	Address Line 1 (Property)	Site EUI	ENERGY STAR Score	Use Description	Address Line 1 (Tax Lot)	Property Name
+	1311523	11 Ninth Street			College/University	11 Ninth Street	Lucky University
+	3020139	2655 Welstone Ave NE	652.3	1	Multifamily Housing	2655 Welstone Ave NE	Hilltop Condos
+	4828379	2660 Welstone Ave NE			Office	2655 Welstone Ave NE	Hilltop Offices
+	1311528	93031 Wellington Blvd			Residence	93029 Wellington Blvd...	International House

 Clicking on the "information" icon displays the Detail view which shows all the labels associated with that record.

 Property : 93031 Wellington Blvd

Add/Remove Labels Labels: **DQ: Low or No ENERGY STAR Score**

FIELD	MASTER
PM Property ID	1311528
Address Line 1 (Property)	93031 Wellington Blvd
Use Description	Residence
ENERGY STAR Score	

# Filter Using Labels: AND / OR

Filter Operator == **AND**: Shows records that have all of the labels in the Filter by Label box  
 In this case, it shows the one record that has both no value for ENERGY STAR Score and Use Description set to College/University

Filter by label: DQ: Low or No ENERGY STAR Score x College/University x Add a label

AND OR EXCLUDE Clear Labels Clear Filters

Cycle: 2018 Compliance Cycle

List Settings Profile: Property List View

View by Property View by Tax Lot 1 property

PM Property ID	Address Line 1 (Proper...	Site EUI	ENERGY STAR Score	Use Description	Address Line 1 (Tax Lot)	Property Name
1311523	11 Ninth Street			College/University	11 Ninth Street	Lucky University

Filter Operator == **OR**: Shows records that have at least one of the labels in the Filter by Label box  
 In this case, it shows the 2 records that have Use Description set to College/University and the 4 records that have low or no ENERGY STAR Score, including the 1 record that fits both criteria

Filter by label: DQ: Low or No ENERGY STAR Score x College/University x Add a label

AND OR EXCLUDE Clear Labels Clear Filters

Cycle: 2018 Compliance Cycle

List Settings Profile: Property List View

View by Property View by Tax Lot 5 properties

PM Property ID	Address Line 1 (Proper...	Site EUI	ENERGY STAR Score	Use Description	Address Line 1 (Tax Lot)	Property Name
1311527	93029 Wellington Blvd	45	34	College/University	93029 Wellington Blvd...	East Computing Hall
1311523	11 Ninth Street			College/University	11 Ninth Street	Lucky University
3020139	2655 Welstone Ave NE	652.3	1	Multifamily Housing	2655 Welstone Ave NE	Hilltop Condos
4828379	2660 Welstone Ave NE			Office	2655 Welstone Ave NE	Hilltop Offices
1311528	93031 Wellington Blvd			Residence	93029 Wellington Blvd...	International House

# Filter Using Labels: EXCLUDE

Filter Operator == **EXCLUDE**: Shows records that have NONE of the labels in the Filter by Label box

Actions ▾ Filter by label: DQ: Low or No ENERGY STAR Score ✕ College/University ✕ Add a label AND OR **EXCLUDE** Clear Labels Clear Filters

Cycle: 2018 Compliance Cycle ▾ List Settings Profile: Property List View ▾

View by Property View by Tax Lot 7 properties

			PM Property ID	Address Line 1 (Proper...	Site EUI	ENERGY STAR Score	Use Description	Address Line 1 (Tax Lot)	Property Name
+	✓	ⓘ	1311526	35 Tenth Street	72	59	Fitness Center/Health ...	11 Ninth Street	Rowling Gym
+	✓	ⓘ	2264	50 Willow Ave SE	125	75	Hotel	050 Willow Ave SE	University Inn
+	✓	ⓘ	5233255	521 Elm Street	1358	55	K-12 School	521 Elm Street; 525 EL...	Montessori Day School
+	✓	ⓘ	1311525	20 Tenth Street	84	43	Laboratory	11 Ninth Street	Biology Hall
	✓	ⓘ	6798215	295302 Moser Lane	942	88	Library		City Library
+	✓	ⓘ	1311524	12 Ninth Street	219	77	Performing Arts	11 Ninth Street	Grange Hall
+	✓	ⓘ	1154623	2700 Welstone Ave NE	1202	63	Retail	2655 Welstone Ave NE	Hilltop Retail

ENERGY STAR Score is valid

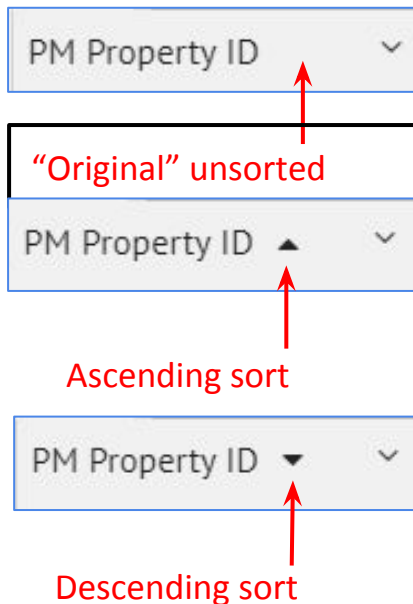
Use Description is not College/University

You can sort in two different ways

- Up/down arrow
- Column menu on right

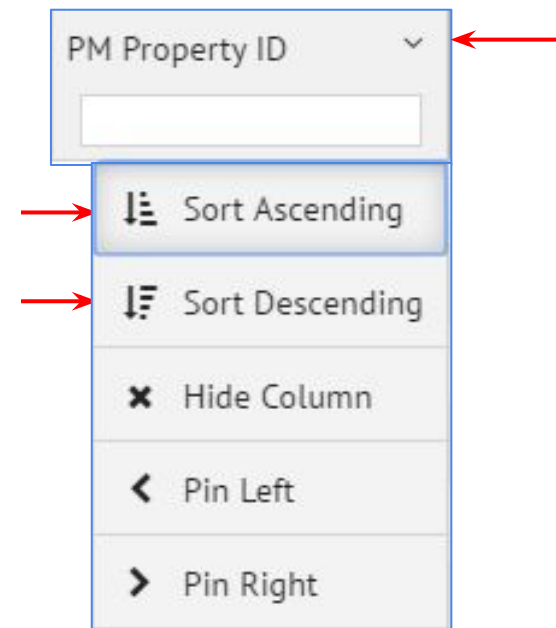
If you click to the right of the field name, you can toggle between

- Ascending
- Descending
- “original” unsorted



The down arrow to the right of the field shows a menu of sort options, including Remove sort

Using this Sort option allows hierarchical sorting

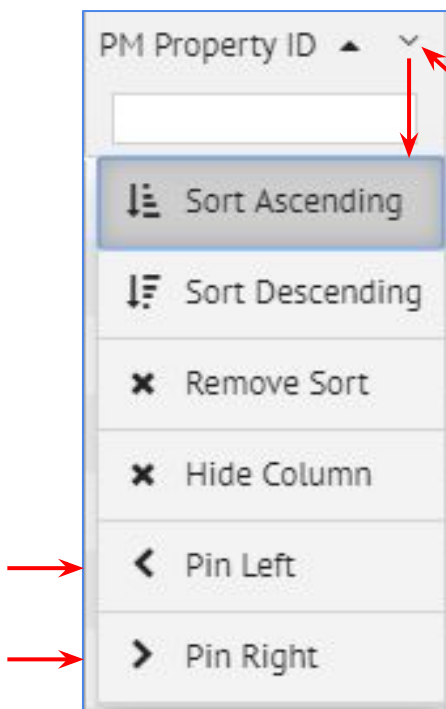




# Pin Columns

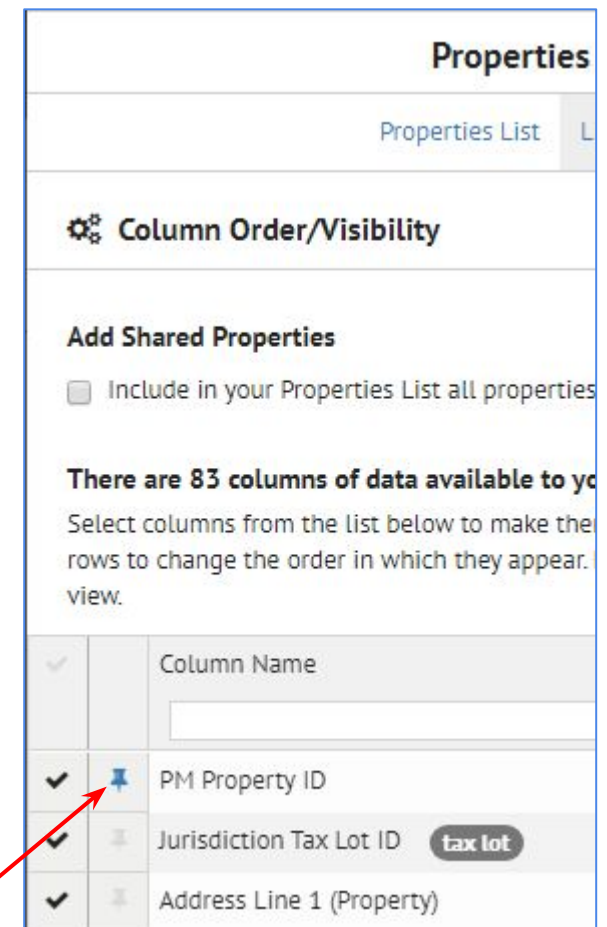
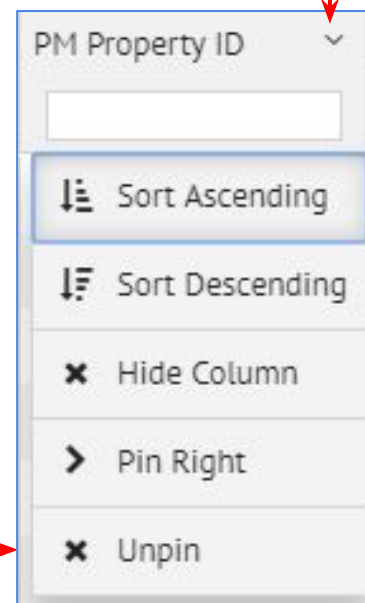
## Pinning columns left and right

- Individual columns can be pinned either to the right or the left
- Multiple columns can be pinned



The down arrow to the right of the field name shows a menu of sort options, including **Hide Column**

If a column is already pinned, click on the field right hand pulldown to select the **Unpin** option



**List Settings** also has feature to pin columns to the right side



# Save List Settings

List Settings, where fields are selected for display, can be saved by “name”, which enables the creation of combinations of fields that are useful to view for specific data review cases.

There are a few different options for doing this.

- **List View / Actions option**

There is now an option in the Actions pulldown list to “**Only Show Populated Columns**”. This is good way to get started when creating a specifically named List Setting

- **List Settings pages**

In all the List Setting views (for both List and Detail view), there is a new option called “List Settings Profile” which allows the currently highlighted fields to be saved to a name, which then appears in a pulldown list in both the List Settings view as well as the Inventory List views.

It is possible to save separate (and multiple) list settings to names for each of these cases:

- View by Property List View
- View by Property Detail View
- View by Tax Lot List View
- View by Tax Lot Detail View

Saved List Settings Profiles are available across Cycles, but can also be made for specific cycles (by naming them appropriately)

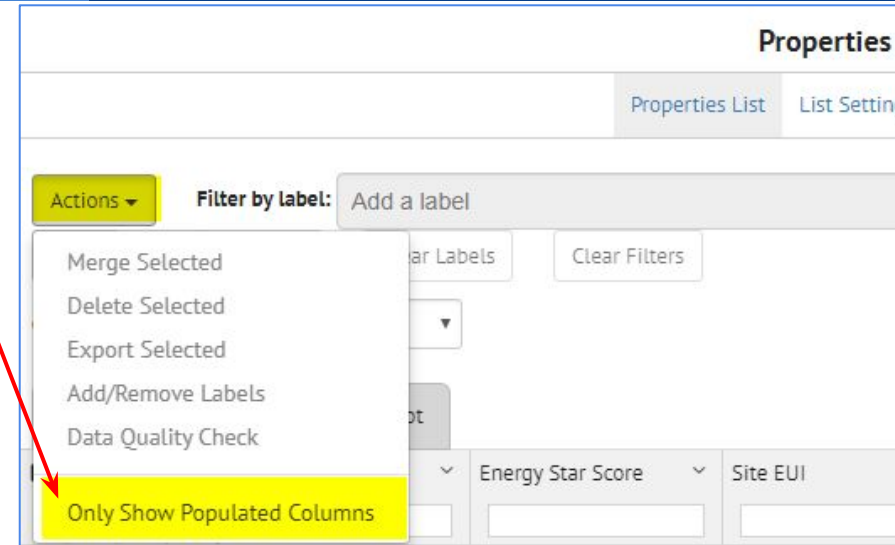
The following pages illustrate the way that these options work.

# List View - Only Show Populated Columns

## List View / Actions option

The “Only Show Populated Columns” option in the Inventory List / Actions pulldown is a good way to get started when defining saved List Settings.

Select the “Only Show Populated Columns” in either the View by Property or View by Tax Lot tabs



Create Settings Profile

Profile Name:

A dialog box appears asking for a name for this new **Settings Profile**. Type in any name that is appropriate. You will be able to refine the fields and change the name later in the List Settings view if needed. Click the **Create Profile** button to save this set of fields under the **Profile Name**

Only Show Populated Columns

This will reset your visible columns and column order to only columns that contain data. Are you sure you want to continue?

This causes a dialog box to appear which warns that the columns displayed will be reset. Click the **Start** button to continue or the **Cancel** button to return to the List view without starting the action.

Only Show Populated Columns

Found 20 populated columns

When the program has finished determining the populated columns, the number of columns found is displayed.

Click the Refresh button to refresh the browser and see the new fields

Cycle:  List Settings Profile:

View by Property  View by Tax Lot 12 properties

	Address Line 1	Analysis State	Campus	City
<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	11 Ninth Street	Not Started	false	Rust
<input checked="" type="checkbox"/>	12 Ninth Street	Not Started	false	Rust

These fields are now what is displayed in the List View with the name entered for the **List Settings Profile**.

It will still probably be necessary to refine the fields to be displayed in **List Settings**, but this is a good way to start the process

# List View - List Settings

- Displays all possible fields for both Tax Lot and Property
- Tax Lot and Property List Settings can be different
- Tags fields that are in table NOT being viewed
- Changes made here are reflected in the View by Tax Lot tab, and vice versa
- Field display and order are on one screen
- Changes are saved to a List Settings Profile (see next page)

**Properties List Settings**

Properties List | List Settings | Reports

Column Order/Visibility | List Settings Profile: Property List View

**Tax Lots List Settings**

Tax Lots List | List Settings | Reports

Column Order/Visibility | List Settings Profile: Tax Lot Detail Fields

**Add Shared Tax Lots**

Include in your Tax Lot List all tax lots shared with you.

**There are 74 columns of data available to you.**

Select columns from the list below to make them appear in your Tax Lot List table. Drag the rows to change the order in which they appear. Pin the rows for them to be left-pinned in the list view.

✓	Column Name	
✓	Jurisdiction Tax Lot ID	
✓	PM Property ID (Property)	property
✓	Address Line 1	
✓	Use Description (Property)	property
✓	Property Name (Property)	property
✓	City	
✓	Parcel Owner	
✓	Taxable SF	
✓	Tax Class	
✓	Notes	
✓	Year Ending (Property)	property

Enter values to search the list of fields

Tags fields that are in the **Property** table when in Tax Lot settings, and vice versa

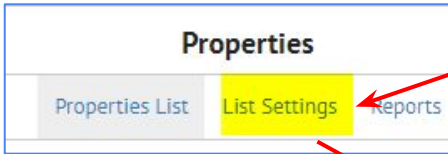
Shows which fields are pinned left

Can set more fields to be pinned left

# List Settings Profiles

- List Settings pages**

In all the List Setting views (for both List and Detail view), there is a new option called “List Settings Profile” which allows the currently highlighted fields to be saved to a name, which then appears in a pulldown list in both the List Settings view as well as the Inventory List views.



To edit an existing List Settings Profile, or to make a new one, click the List Settings link on either the Properties or Tax Lot List View

The main screenshot shows the 'Properties List Settings' configuration page. At the top, there are tabs for 'Properties List', 'List Settings', and 'Reports'. Below the tabs, there is a section for 'Column Order/Visibility' with a dropdown menu showing 'List Settings Profile: Property Default List View'. To the right of the dropdown are four icons: a green checkmark (labeled 'Save'), a blue document with a pencil (labeled 'Rename'), a red 'X' (labeled 'Delete'), and a blue document with a pencil (labeled 'New'). Below this is a section for 'Add Shared Properties' with a checkbox and a text area. Further down, there is a list of columns with checkboxes and a 'Pin' icon. The columns are: 'Address Line 1', 'Analysis State', and 'Campus'. Red arrows point from the 'Save', 'Rename', 'Delete', and 'New' icons to their respective labels. Another red arrow points from the 'List Settings' tab to the 'List Settings Profile' dropdown. A red arrow points from the 'Address Line 1' checkbox to the text 'Check new fields you want to add to the List Settings Profile'. A red arrow points from the 'Analysis State' checkbox to the text 'Uncheck fields you want to remove from the List Settings Profile'. A red arrow points from the 'New' icon to the text 'Click New to save the newly selected fields to a new List Settings Profile'. A red arrow points from the 'Save' icon to the text 'Click Save to save the changes to the current List Setting Profile'.

Click **Save** to save the changes to the current **List Setting Profile**

Click **New** to save the newly selected fields to a new **List Settings Profile**

**Check** new fields you want to add to the **List Settings Profile**

**Uncheck** fields you want to remove from the **List Settings Profile**



# List View – List Settings – Reorder Columns

✓		Column Name
✓	📌	PM Property ID
✓	⌵	Jurisdiction Tax Lot ID <b>tax lot</b>
✓	⌵	Address Line 1 (Property)
✓	⌵	Property Name
✓	⌵	Gross Floor Area
✓	⌵	ENERGY STAR Score
✓	⌵	City (Property)

Click and hold down the left mouse button, and drag the Column Names around to change the order

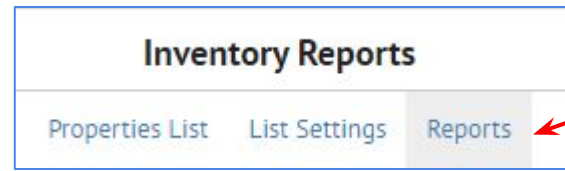
✓		Column Name
		<input type="text" value="address"/>
✓	⌵	Address Line 1 (Property)
✓	⌵	Address Line 2 (Property)
✓	⌵	Owner Address
✓	⌵	Address Line 2 (Tax Lot) <b>tax lot</b>
✓	⌵	Address Line 1 (Tax Lot) <b>tax lot</b>

Type into the input box to filter the list of fields

Adding a checkmark to an unchecked field adds it to the end of the checked fields. It can then be dragged to the desired position

✓		Column Name
		<input type="text"/>
✓	⌵	Site EUI
✓	⌵	Property Type
✓	⌵	Year Ending
✓	⌵	Custom ID 1
✓	⌵	Address Line 1 (Tax Lot) <b>tax lot</b>
✓	⌵	PM Release Date

# List View – Reports Overview



From either the **Properties** or **Tax Lots Inventory List** view click on **Reports**

## Select criteria to graph

**Date ranges for reporting based on Cycles**

From first date of: 2012 Compliance Year ▼    Until last date of: 2012 Compliance Year ▼

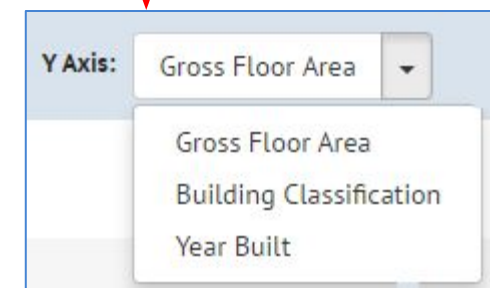
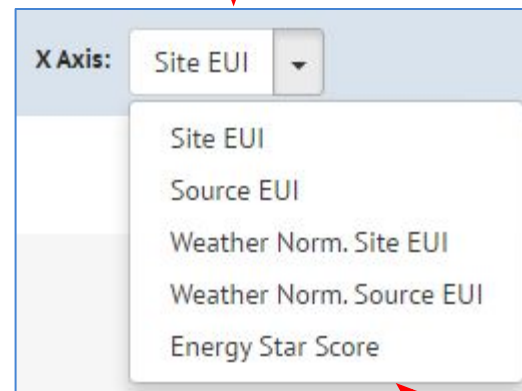
**X Axis (Energy data)**: Site EUI ▼

**Y Axis (Building Characteristic)**: Gross Floor Area ▼

**Update Charts**

Click **Update Charts**

The pulldown list shows the Cycles for the organization



**These field names must have been used when Mapping data in order to show data in the reports (see the next page for details)**

# List View – Reports – Field Mapping

**You need to map the following fields in order for the reports to work**  
*(Future work will include the ability to select fields that you want to plot so the mapping will not be as critical)*

The screenshot shows a report configuration interface. On the left, there are two dropdown menus for 'X Axis' and 'Y Axis'. The 'X Axis' dropdown is currently set to 'Site EU' and shows a list of options: 'Site EU', 'Source EU', 'Weather Norm. Site EU', 'Weather Norm. Source EU', and 'Energy Star Score'. The 'Y Axis' dropdown is currently set to 'Gross Floor Area' and shows a list of options: 'Gross Floor Area', 'Building Classification', and 'Year Built'. On the right, there is a table titled 'Mapped Fields' with two columns: 'SEED HEADER' and 'DATA FILE HEADER'. The table contains the following rows:

SEED HEADER	DATA FILE HEADER
Site EU	Site EU (kBtu/ft2)
Source EU	Source EU (kBtu/ft2)
Site EU Weather Normalized	Weather Normalized Site EU (kBtu/ft2)
Source EU Weather Normalized	Weather Normalized Source EU (kBtu/ft2)
Energy Score	ENERGY STAR Score
Gross Floor Area	Gross Floor area
Use Description	Use Description
Year Built	Year Built
Year Ending	Year Ending

Red arrows indicate the mapping from the 'Mapped Fields' table to the dropdown menus. Arrows point from 'Site EU' to the 'X Axis' dropdown, from 'Source EU' to the 'X Axis' dropdown, from 'Weather Normalized Site EU' to the 'X Axis' dropdown, from 'Weather Normalized Source EU' to the 'X Axis' dropdown, from 'Energy Star Score' to the 'X Axis' dropdown, from 'Gross Floor Area' to the 'Y Axis' dropdown, from 'Building Classification' to the 'Y Axis' dropdown, and from 'Year Built' to the 'Y Axis' dropdown.

# List View – Reports

## Scatter Plot with all buildings

## Bar Graph with Median Values

### Inventory Reports

Properties List List Settings Reports

Property Reports

From first date of: 2017 Compliance

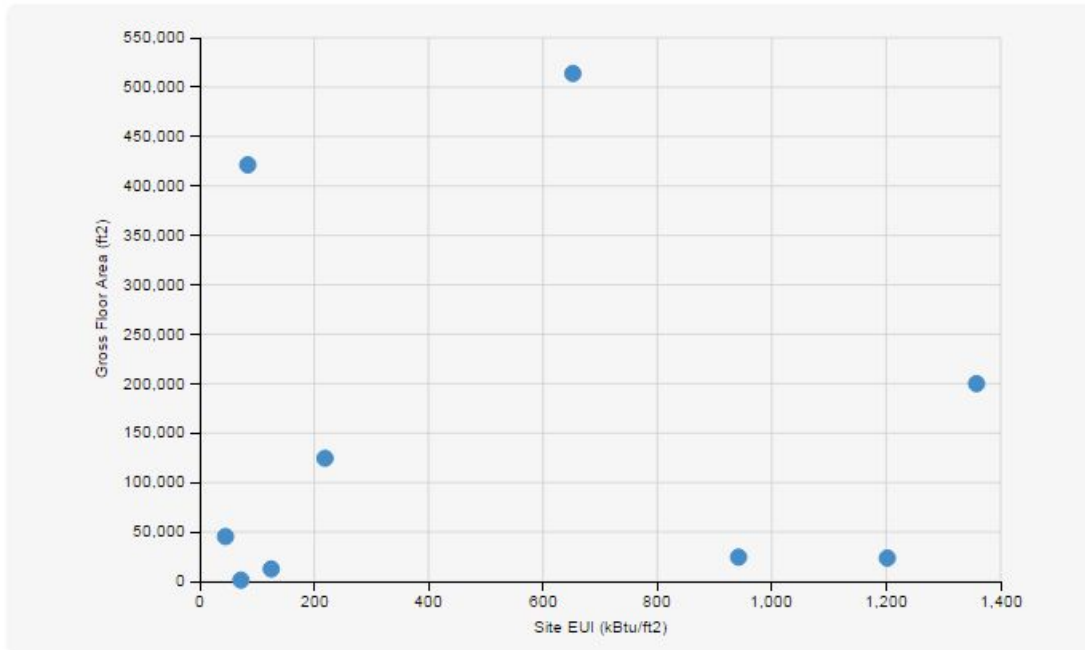
Until last date of: 2017 Compliance

X Axis: Site EUI

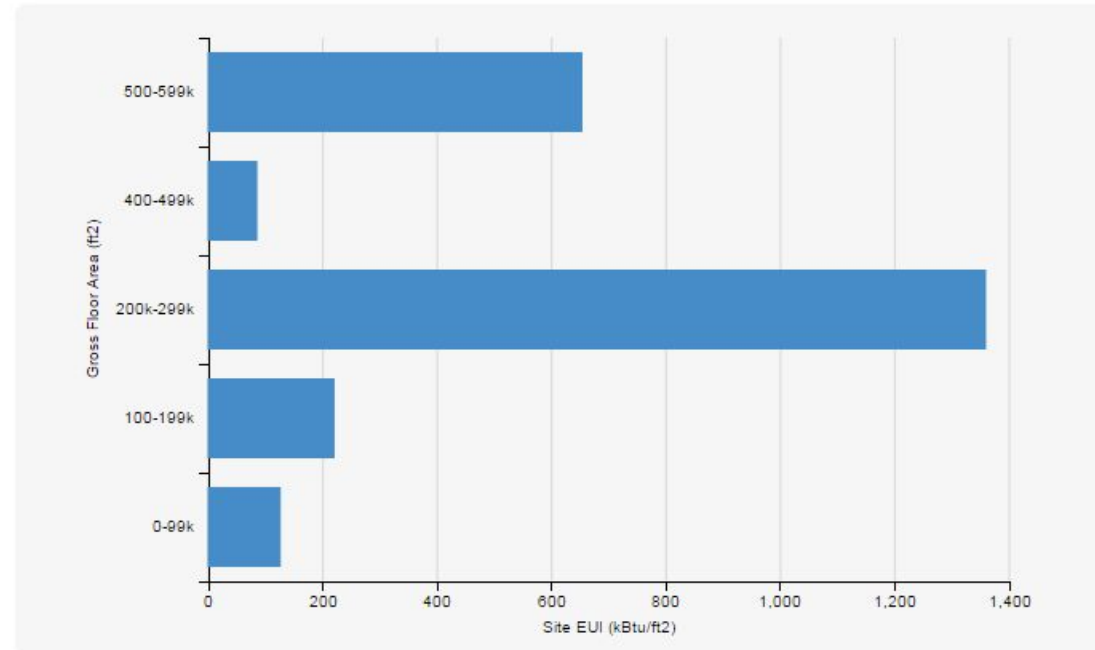
Y Axis: Gross Floor Area

Update Charts

Site Energy Use Intensity vs. Gross Floor Area



Site Energy Use Intensity vs. Gross Floor Area (Aggregated)



Year Ending	Properties with Data	Total Properties
● 2017	9	12

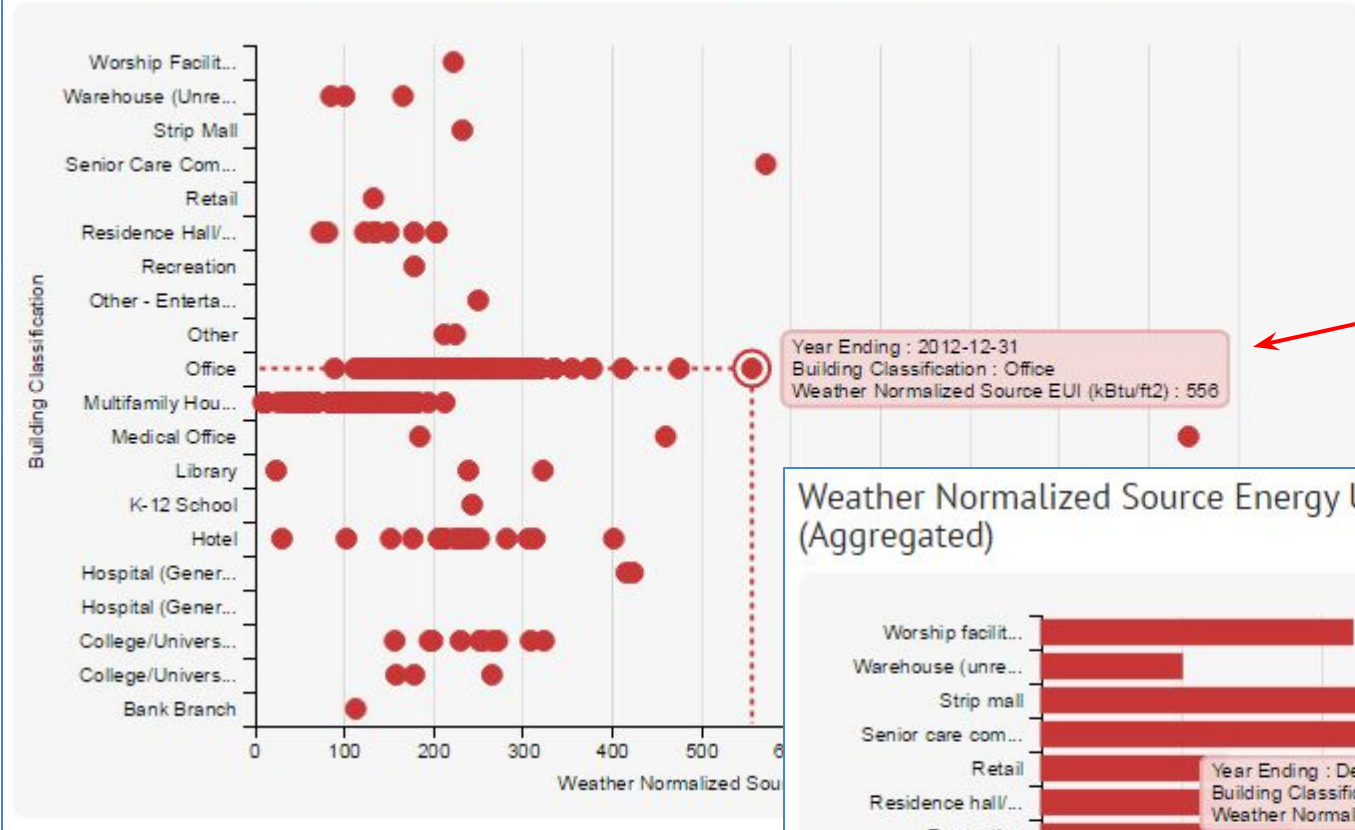
Year Ending	Properties with Data	Total Properties
■ 2017	9	12

Program reports # data points actually used for graphs



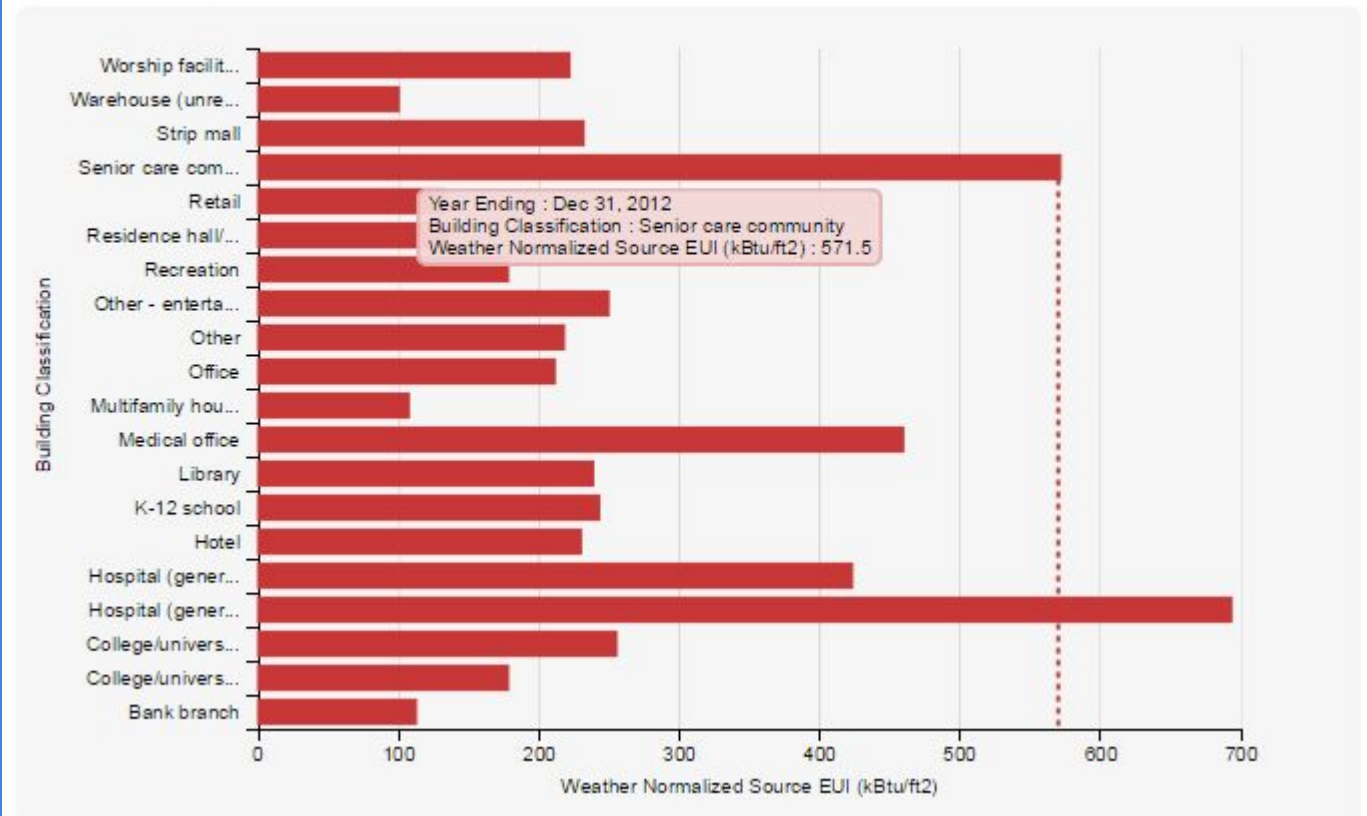
# List View – Reports

### Weather Normalized Source Energy Use Intensity vs. Building Classification



Mouse over point to display exact data for that point

### Weather Normalized Source Energy Use Intensity vs. Building Classification (Aggregated)

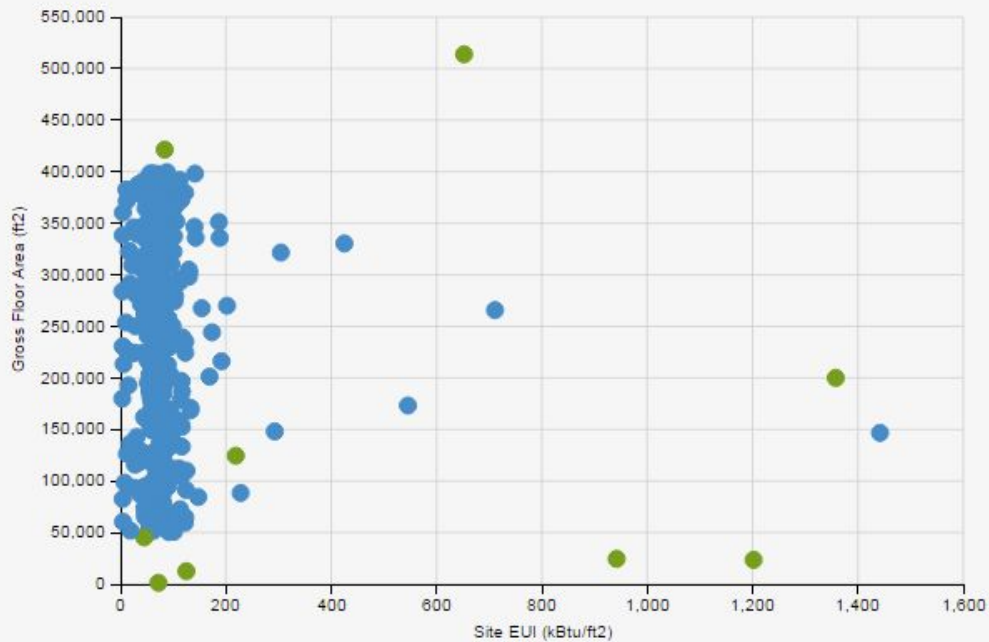




# List View – Reports - Multiple Years of Data

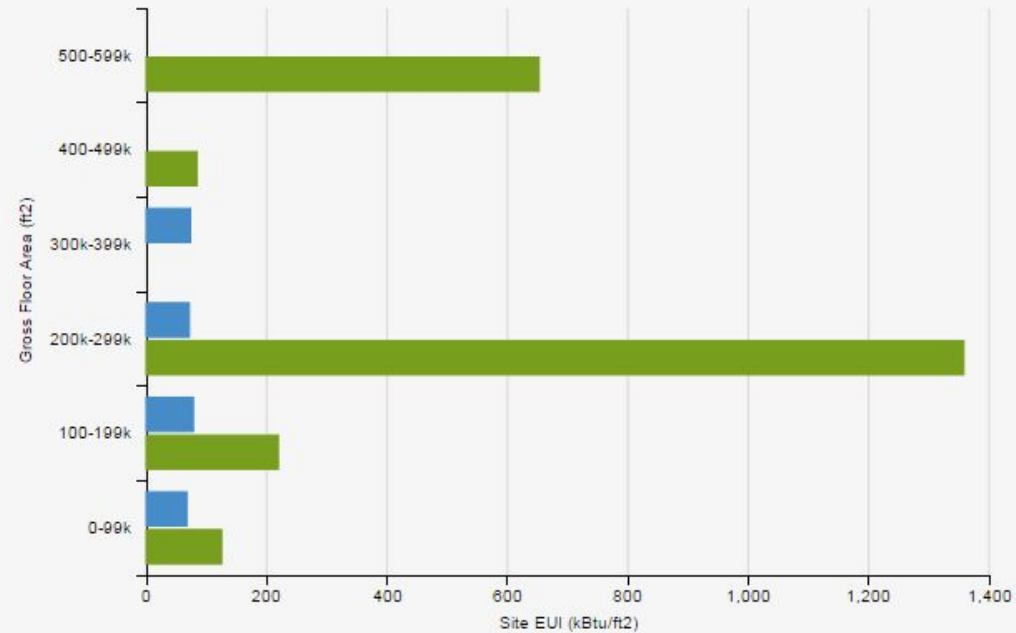
**Multiple years of data**  
(based on Cycles)

Site Energy Use Intensity vs. Gross Floor Area



Year Ending	Properties with Data	Total Properties
● 2016	392	512
● 2017	9	12

Site Energy Use Intensity vs. Gross Floor Area (Aggregated)



Year Ending	Properties with Data	Total Properties
■ 2016	392	512
■ 2017	9	12

# Labels - List View

You can add pre-defined labels to records in the Inventory List view using the Actions pulldown list

2 - From the **Actions** pulldown list, select **Add/Remove Labels**

3 - The **Add/Remove Labels** dialog box appears. Click the **Add** button for the label(s) to add

1 - Select the records to label

				Properties List		
Actions		Filter by Label	Add a label			
<ul style="list-style-type: none"> <li>Merge Selected</li> <li>Delete Selected</li> <li>Export Selected</li> <li><b>Add/Remove Labels</b></li> <li>Data Quality Check</li> </ul>						
Only Show Populated Columns				Address Line 1	ENERGY STAR Score	Jur
				50 Willow Ave SE	75	15
				2700 Welstone Ave NE	63	11
	✓			11 Ninth Street		24
				12 Ninth Street	77	24
				20 Tenth Street	43	24
				35 Tenth Street	59	24651456
				93029 Wellington Blvd	34	13334485; 23810533
	✓			93031 Wellington Blvd		13334485; 23810533
				2655 Welstone Ave NE	1	11160509
						Rowling Gym
						East Computing Hall
						International House
						Hilltop Condos

### Add/Remove Labels

Create new label:

Add or remove labels from 2 selected properties

- Low or No ENERGY STAR Score**
- Missing Data**
- Non-Residential**
- QC: Number of Buildings missing**
- Questionable Report**
- Residential**
- Update Bldg Info**

A 'Remove' button is shown for tags that are already applied to one or more properties in the current selection

4 - Click the **Done** button and that label (or labels) will be added to the selected records

# Labels - Adding Labels “on the fly”

You can also define labels “on the fly” from the Inventory List view

In the Property or Tax Lot tab

1. Filter a field or fields -- in this example we are filtering on the **Property Type** field for any value with **college** in the name
2. Select all the records by click the checkbox to the left of the column names
3. Click the **Actions** pulldown list
4. Select the **Add/Remove Labels** choice
5. The **Add/Remove Labels** dialog box appears
6. Type the name of the new label in the **Create new label** box and select the color
7. Click the **Create Label** button
8. The new label is added to the list of Labels
9. Click the **Add** button for the label you just created
10. Click the **Done** button to apply the label to the selected records

The label will be added to all the selected records  
You can view the labels for each record in the Building Detail view (see next page)

3 Actions Filter by label: Add a label

4 Merge Selected  
Delete Selected  
Export Selected  
Add/Remove Labels  
Data Quality Check  
Only Show Populated Columns

1 Address Line 1 Property Type  
college

2 1311527  
11 Ninth Street College/University  
93029 Wellington Blvd College/University

5 Add/Remove Labels

6 Create new label College/University green Create Label

7 Add or remove labels from 2 selected

6 Add Add Add

Call  
Change of Ownership  
Compliant

8 Add or remove labels from 2 selected properties

9 College/University Add

Call Add

10 Done Cancel

# Detail View - Property & Tax Lot

From the Inventory List view, click the "Information" icon for a record to access the Inventory Detail view.



View by Property		View by
+	✓	PM Property ID
+	✓	5233255
	✓	6798444

The **Tax Lot Detail** view will only show fields and data mapped to the Tax Lot table

The **Property Detail** view will only show fields and data mapped to the Property table

Property Detail
Notes
Settings

**Property : 521 Elm Street**

Add/Remove Labels

Labels: > 50,000 SF

Cycle: 2018 Compliance Cycle

Detail Settings Profile: Property Detail Fields

FIELD	MASTER	EXAMPLE-DATA-ESPM.XLSX
PM Property ID	5233255	5233255
Address Line 1	521 Elm Street	521 Elm Street
Property Name	Montessori Day School	Montessori Day School
Property Type	K-12 School	K-12 School
City	Rust	Rust
Gross Floor Area	200000	200000
ENERGY STAR Score	55	55
Site EUI	1358	1358
Owner	Norton Schools	Norton Schools
Owner Telephone	213-555-4368	213-555-4368
Owner Email	Lee@norton.com	Lee@norton.com

**Paired Tax Lots**

TAX LOT ID	ADDRESS LINE 1	UNPAIR
<a href="#">33366148</a>	530 Elm Street	✕
<a href="#">33366555</a>	521 Elm Street	✕
<a href="#">33366125</a>	525 Elm Street	✕

Settings link controls fields displayed and order

Edit the Master record

Add/Remove Labels

Labels assigned to the record

Associated records can be unpaired

The first column is the **Master** record

History of record shown in columns

Links to access associated (paired) Tax Lot record detail views

# Detail View - Notes

Property Detail Notes

Property Detail **Notes** Settings

Created	Type	Name	Text
02/01/2018 01:45:43 PM	Note	Manually Created	Need to get back to owner that the acc

Property and Tax Lot details each have their own notes

Add New Note

Note





Contact is Joyce Wise: 511-293-3929

Property Detail Notes

Property Detail **Notes** Settings

Created	Type	Name	Text
02/01/2018 01:50:24 PM	Note	Manually Created	Contact is Joyce Wise: 511-293-3929
02/01/2018 01:45:43 PM	Note	Manually Created	Need to get back to owner that the account is not complete

Icon indicates Notes (Inventory List)

				PM Property ID
<input type="checkbox"/>	<input type="checkbox"/>			<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>			1311527
<input type="checkbox"/>	<input type="checkbox"/>			1311528

When unmerging a record that contains notes, the notes are duplicated to each new record with the original timestamps preserved.

When merging records that contain notes, the notes are combined into the new record with the original timestamps preserved. If exact note duplicates exist (for instance, from unmerging a record prior to re-merging) the exact duplicates are de-duplicated.



# Detail View - Settings - Property & Tax Lot

Click Settings from either **Property** or **Tax Lot Detail view** to set the visibility and order properties for fields.

**Tax Lot Detail Settings** will only contain fields and data from the **Tax Lot** table

**Property Detail Settings** will only contain fields and data from the **Property** table

Enter values to search the list of fields, then “check” the ones you want to display

<input checked="" type="checkbox"/>		Column Name	<input type="text" value="city"/>
<input checked="" type="checkbox"/>	↓	City (Property)	
<input checked="" type="checkbox"/>	↓	City (Tax Lot)	<b>tax lot</b>
<input checked="" type="checkbox"/>	↓	Owner City/State	

Check the fields to display, uncheck them to prevent them from displaying, in the Detail view

Drag fields up and down to set the order

← Properties

## Property Detail Settings

Property Detail
Notes
Settings

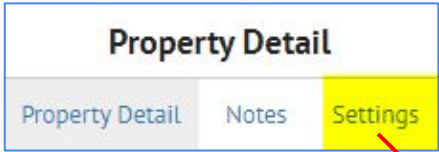
⚙️ Column Order/Visibility
Detail Settings Profile: Property Detail Fields

There are 56 columns of data available to you.  
Select columns from the list below to make them appear in your Properties Detail table. Drag the rows to change the order in which they appear.

<input checked="" type="checkbox"/>		Column Name	<input type="text"/>
<input checked="" type="checkbox"/>		PM Property ID	
<input checked="" type="checkbox"/>		Address Line 1	
<input checked="" type="checkbox"/>		Property Name	
<input checked="" type="checkbox"/>		Property Type	
<input checked="" type="checkbox"/>		City	
<input checked="" type="checkbox"/>		Gross Floor Area	
<input checked="" type="checkbox"/>		ENERGY STAR Score	
<input checked="" type="checkbox"/>		Site EUI	
<input checked="" type="checkbox"/>		Owner	
<input checked="" type="checkbox"/>		Owner Telephone	
<input checked="" type="checkbox"/>		Owner Email	
<input checked="" type="checkbox"/>		Address Line 2	

# Detail View - Settings - Property & Tax Lot

In all the Detail View (for both Property and Tax Lot views) the “List Settings Profile” allows the currently highlighted fields to be saved to a name, which then appears in a pulldown list. This allows different sets of fields to be saved to different profiles.



To edit an existing Detail Settings Profile, or to make a new one, click the Settings link on either the Property or Tax Lot Detail View

← Properties

## Property Detail Settings

Property Detail
Notes
Settings

Column Order/Visibility

Detail Settings Profile: Property Detail Default Fielc

✓
✎
✕
✎

**There are 943 columns of data available to you.**  
 Select columns from the list below to make them appear in your Properties Detail table. Drag the rows to change the order in which they appear.

<input type="checkbox"/>	Column Name
<input checked="" type="checkbox"/>	Custom ID 1
<input checked="" type="checkbox"/>	PM Property ID
<input checked="" type="checkbox"/>	PM Parent Property ID
<input checked="" type="checkbox"/>	Address Line 1

Rename

New

Click **Save** to save the changes to the current **List Setting Profile**

Click **New** to save the newly selected fields to a new **List Settings Profile**

Save

Delete

Check new fields you want to add to the **List Settings Profile**

Uncheck fields you want to remove from the **List Settings Profile**

# Detail View - Edit the Master Record

From the **Inventory List** view, click the **“Information”** icon for a record to access the **Inventory Detail** view.

← Properties **Property Detail**

Property Detail Notes Settings

Property : 11 Ninth Street Edit

Add/Remove Labels Labels: > 50,000 SF College/University Cycle: 2018 Compliance Cycle

Click **Edit** to change the information in the **Master** record.

Property : 11 Ninth Street Save Changes Cancel

Add/Remove Labels Labels: Cycle: 2018 Compliance Cycle

Detail Settings Profile: Property Detail Fields

FIELD	MASTER	EXAMPLE-DATA-ESPM.XLSX
PM Property ID	<input type="text" value="1311523"/>	1311523
Address Line 1	<input type="text" value="11 Ninth Street"/>	11 Ninth Street
Property Name	<input type="text" value="Lucky University"/>	Lucky University
Property Type	<input type="text" value="College/University"/>	College/University
City	<input type="text" value="Rust"/>	Rust
Gross Floor Area	<input type="text" value="55432"/>	
ENERGY STAR Score	<input type="text"/>	

Click the **Save Changes** button in the upper right of the view when you have finished editing the **Master** record

This will put you in **“Edit”** mode

To Edit Data:

Click on the data field in the **Master Record** and edit it directly

FIELD	MASTER
PM Property ID	1311523
Address Line 1	11 Ninth Street
Property Name	Lucky University
Property Type	College/University
City	Rust
Gross Floor Area	55432

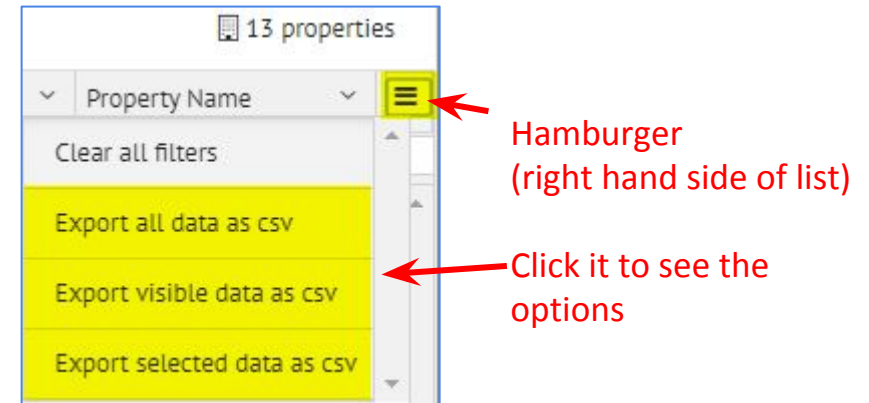
The Master record is now updated with the changes

# Export Data -- 2 Options

## Option 1: Export options from the “Hamburger” menu

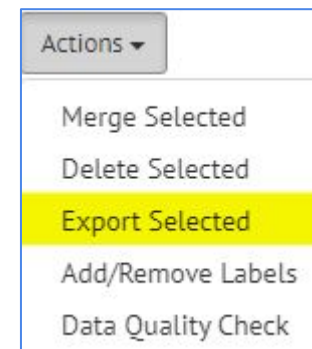
*(this is probably the preferred option for most export needs)*

- 3 choices
  - **1a:** Export all data as CSV
  - **1b:** Export visible data as CSV
  - **1c:** Export selected data as CSV  
*This option only appears if you have checked some or all of the records*
- Pros
  - Multiple values for matching fields will be exported (which will not using Option 2)
  - You can export the data as
    - “collapsed” (one line per record) or
    - “expanded” (includes separate lines for associated data)
- Cons
  - You do not have control over the export filename
    - Then name defaults to
      - <Organization Name> <Property/Tax Lot> Data.csv  
Such as:  
LBNL 302 Property Data.csv
    - Multiple exports result in filenames with sequential numbers after them (they are not overwritten)
      - LBNL 302 Property Data (1).csv
  - You do not have control over the location of the export file -- it will always be exported to your “Downloads” folder



## Option 2: Export Selected from the Actions pulldown

- Pros
  - You can specify the filename and download location
- Cons
  - There is a **bug** that doesn't export multiple values in associated data fields
  - Only exports “collapsed” no matter what the Inventory view is



The following pages show examples using each of these options

# Export Data -- Option 1a

## Option 1a: Export all data as csv

- Exported data is “expanded” whether Inventory List is in “collapsed” or “expanded” view
- All records exported
- All fields set in List Settings exported

PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	Address Line 1 (Property)	Property Name	Property Type	Gross F
1311525	24651455		20 Tenth Street	Biology Hall	Lab	
4828379	11160509	2655 Welstone Ave NE	2660 Welstone Ave NE	Hilltop Offices	Off	
5233255	33366125; 33366148; ...	521 Elm Street; 525 EL...	521 Elm Street	Montessori Day School	K-1	
6798444			295444 Moser Lane	Senior Center	Social Meeting Hall	15533
1154623	11160509	2655 Welstone Ave NE	2700 Welstone Ave NE	Hilltop Retail	Retail	23543

The Inventory List can be in “collapsed” or “expanded” view

The export will always be “expanded”, i.e., showing all the records including the associated records from the other table (Tax Lot or Property)

A	B	C	D	E	F
PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	Address Line 1 (Property)	Property Name	Property Type
1311525	24651455		20 Tenth Street	Biology Hall	Laboratory
	24651455				
4828379	11160509	2655 Welstone Ave NE	2660 Welstone Ave NE	Hilltop Offices	Office
	11160509	2655 Welstone Ave NE			
5233255	33366125; 33366148; 33366555	521 Elm Street; 525 Elm Street; 530 Elm Street	521 Elm Street	Montessori Day School	K-12 School
	33366555	521 Elm Street			
	33366148	530 Elm Street			
	33366125	525 Elm Street			
6798444			295444 Moser Lane	Senior Center	Social Meeting Hall
1154623	11160509	2655 Welstone Ave NE	2700 Welstone Ave NE	Hilltop Retail	Retail
	11160509	2655 Welstone Ave NE			



# Export Data -- Option 1b -- collapsed

## Option 1b: Export visible data as csv

- Exported data is in same form as Inventory List (in the example below, both are “collapsed”)
- All records exported
- All fields set in List Settings exported

View by Property		View by Tax Lot							13 properties
+	✓	PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	Property Name	Address Line 1 (Property)	Property Type	Gross Floor Area	
+	✓	1311525	24651455		Biology Hall	20 Tenth Street	Lab		
+	✓	4828379	11160509	2655 Welstone Ave NE	Hilltop Offices	2660 Welstone Ave NE	Off		
+	✓	5233255	33366125; 33366148; 33366555	521 Elm Street; 525 Elm Street; 530 Elm Street	Montessori Day School	521 Elm Street	K-12		
	✓	6798444			Senior Center	295444 Moser Lane	Social Meeting Hall	15533	
+	✓	1154623	11160509	2655 Welstone Ave NE	Hilltop Retail	2700 Welstone Ave NE	Retail	23543	

Collapsed view in Inventory List (13 Property records)  
 Collapsed records in export (13 records)

	A	B	C	D	E	F
1	PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	Property Name	Address Line 1 (Property)	Property Type
2	1311525	24651455		Biology Hall	20 Tenth Street	Laboratory
3	4828379	11160509	2655 Welstone Ave NE	Hilltop Offices	2660 Welstone Ave NE	Office
4	5233255	33366125; 33366148; 33366555	521 Elm Street; 525 Elm Street; 530 Elm Street	Montessori Day School	521 Elm Street	K-12 School
5	6798444			Senior Center	295444 Moser Lane	Social Meeting Hall
6	1154623	11160509	2655 Welstone Ave NE	Hilltop Retail	2700 Welstone Ave NE	Retail
7	1311527	13334485; 23810533	93029 Wellington Blvd; 94000 Wellington Blvd	East Computing Hall	93029 Wellington Blvd	College/University
8	1311528	13334485; 23810533	93029 Wellington Blvd; 94000 Wellington Blvd	International House	93031 Wellington Blvd	Residence
9	1311524	24651456	11 Ninth Street	Grange Hall	12 Ninth Street	Performing Arts
10	1311526	24651456	11 Ninth Street	Rowling Gym	35 Tenth Street	Fitness Center/Health Club
11	1311523	24651456	11 Ninth Street	Lucky University	11 Ninth Street	College/University
12	2264	1552813	050 Willow Ave SE	University Inn	50 Willow Ave SE	Hotel
13	6798215			City Library	295302 Moser Lane	Library
14	3020139	11160509	2655 Welstone Ave NE	Hilltop Condos	2655 Welstone Ave NE	Multifamily Housing

# Export Data -- Option 1b -- expanded

## Option 1b: Export visible data as csv

- Exported data is in same form as Inventory List (in the example below, both are “expanded”)
- All records exported
- All fields set in List Settings exported

View by Property | View by Tax Lot | 13 properties

PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	Address Line 1 (Property)	Property Name	Property Type	Gross F
1311527	13334485; 23810533	93029 Wellington Blvd; 94000 Wellington Blvd	93029 Wellington Blvd	East Computing Hall	College/University	
	13334485	93029 Wellington Blvd				
	23810533	94000 Wellington Blvd				
1311523	24651456	11 Ninth Street	11 Ninth Street	Lucky University	College/University	
	24651456	11 Ninth Street				

Clear all filters  
 Export all data as csv  
**Export visible data as csv**

Expanded view in Inventory List  
 Expanded records in export

All records are exported with their associated records;  
 in this case, all 13 Property records are exported with  
 separate lines for their associated Tax Lot records

LBNL 302 Property Data.csv - Microsoft Excel

	A	B	C	D	E	F
1	PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	Property Name	Address Line 1 (Property)	Property Type
2	1311527	13334485; 23810533	93029 Wellington Blvd; 94000 Wellington Blvd	East Computing Hall	93029 Wellington Blvd	College/University
3		13334485	93029 Wellington Blvd			
4		23810533	94000 Wellington Blvd			
5	1311523	24651456	11 Ninth Street	Lucky University	11 Ninth Street	College/University
6		24651456	11 Ninth Street			

# Export Data -- Option 1c

## Option 1c: Export selected data as csv

- Exported data is “collapsed” whether Inventory List is in “collapsed” or “expanded” view
- Selected (checked) records are exported
- All fields set in the Inventory List view List Settings are exported

	PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	Address Line 1 (Property)	Property Name	Property Type	Gross Floor Area
<input checked="" type="checkbox"/>	1311525	24651455		20 Tenth Street	Biology Hall	Laboratory	421351
<input checked="" type="checkbox"/>	4828379	11160509	2655 Welstone Ave NE	2660 Welstone Ave NE	Hilltop Offices	Office	55121
<input checked="" type="checkbox"/>	5233255	33366125; 33366148; ...	521 Elm Street; 525 EL...	521 Elm Street	Montessori Day School	K-12 School	200000
<input type="checkbox"/>	6798444			295444 Moser Lane	Senior Center	Sc...	

All selected (checked) records are exported (3 in this example)

Multiple values in matching fields are included (in this case the Jurisdiction Tax Lot ID and Address Line 1 Tax Lot fields)

	A	B	C	D	E	F	G	H
1	PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	Property Name	Address Line 1 (Property)	Property Type	Gross Floor Area	UBID
2	1311525	24651455		Biology Hall	20 Tenth Street	Laboratory	421351	11
3	4828379	11160509	2655 Welstone Ave NE	Hilltop Offices	2660 Welstone Ave NE	Office	55121	3
4	5233255	33366125; 33366148; 33366555	521 Elm Street; 525 Elm Street; 530 Elm Street	Montessori Day School	521 Elm Street	K-12 School	200000	5

All fields set in List Settings (and visible in the Inventory List view) are exported



# Export Data -- Option 2

## Option 2: Export Selected

- **Exported data is “collapsed”** whether Inventory List is in “collapsed” or “expanded” view
- Selected (checked) records are exported
- All fields set in the Inventory List view List Settings are exported
- Pro
  - You can specify the name and location of the exported file
- Con
  - **BUG:** If there are multiple associated values in any matching fields (such as Jurisdiction Tax Lot ID, UBID, etc) only one value will be exported (*this will be fixed in future versions*)
    - If you don't have multiple values in a matching field or you don't want to export those fields, you can use this option

The screenshot shows a software interface with a dropdown menu open. The menu items are: Merge Selected, Delete Selected, **Export Selected** (highlighted in yellow), Add/Remove Labels, Data Quality Check, and Only Show Populated Columns. Below the menu is a table with columns for Jurisdiction Tax Lot ID (Tax Lot) and Address Line 1 (Tax Lot). The table contains three rows of data. Red arrows point from the table rows to the 'Export Selected' option in the menu.

Records with single values in the matching fields (in this case Jurisdiction Tax Lot ID and Address Line 1 Tax Lot) are exported properly

Records with multiple values in the matching fields (in this case Jurisdiction Tax Lot ID and Address Line 1 Tax Lot) are **NOT** exported properly -- only one of the values is exported

	B	C	D	E	F	G	H	I	
	PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	Property Name	Address Line 1 (Property)	Property Type	Gross Floor Area	UBID	Property Lab
1	1311525	24651455		Biology Hall	20 Tenth Street	Laboratory	421351	11	> 50,000 SF
2	4828379	11160509	2655 Welstone Ave NE	Hilltop Offices	2660 Welstone Ave NE	Office	55121	3	> 50,000 SF
3	5233255	33366555	521 Elm Street	Montessori Day School	521 Elm Street	K-12 School	200000	5	> 50,000 SF

# Overview

- Every account holder belongs to an Organization
- Most SEED users will only have a Parent Organization

Organizations				
Organizations I Manage				
ORGANIZATION				
LBNL 20				
Sub-Organizations				
Organizations I Belong To				
ORGANIZATION NAME	NUMBER OF PROPERTIES	NUMBER OF TAX LOTS	YOUR ROLE	ORGANIZATION OWNER(S)
LBNL 20	2017 Compliance: 12	2017 Compliance: 10	owner	Robin LBNL 20

Number of records for **Properties** and **Tax Lots** for each **Cycle**, by **Organization**

- SEED is structured to allow a Parent Organization to have Sub-Organizations

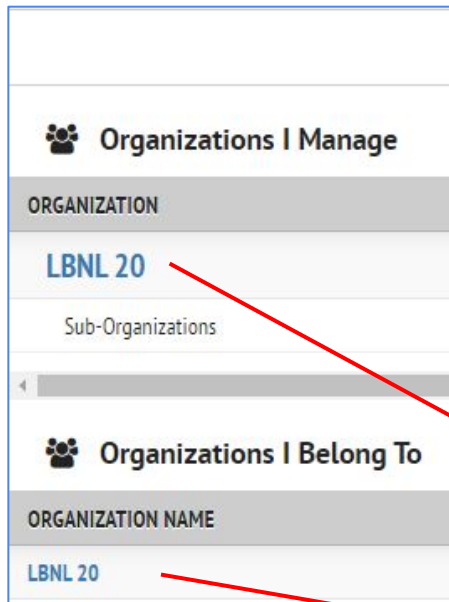
Organizations	
Organizations I Manage	
ORGANIZATION	
lbnl	
Sub-Organizations	
LBL 1	
LBL 2	
LBL 3	
LBL 4	

There is a Parent Organization

There can also optionally be Sub-Organizations

- Role can be:
- Owner
  - Member
  - Viewer





- Click on an organization in either
  - Organizations I Manage
  - Or
  - Organizations I Belong To
- The view for that organization will be displayed



Organization Name

- The links from this view are
  - **Settings:** The Admin screen for organization settings
  - **Sharing:** The Admin screen for managing how data is shared
  - **Column Settings:** Change the names of the fields in the existing data
  - **Column Mappings:** Manage the mappings for new fields being imported
  - **Data Cleansing:** The Admin screen for managing Data Cleansing settings
  - **Cycles:** The Admin screen for managing Cycles
  - **Labels:** The Admin screen for managing Labels
  - **Sub-Organizations:** A list of all sub-organizations related to this organization
  - **Members:** A list of all members of this organization

# Settings Admin Page

In the Organization / Settings tab, you can change the name of the organization

Click on the  
**Settings** link



The screenshot shows the Settings Admin Page with the following elements:

- Navigation Bar:** Settings (selected), Sharing, Column Settings, Column Mappings, Data Quality, Cycles, Labels, Sub-Organizations, Members.
- Settings Section:** Settings (gear icon), Save Changes (button).
- Organization Name:** Input field containing "LBNL 20". A red arrow points to this field with the text: "You can change the organization name".
- Measurement unit display for energy use intensities (EUI):** Dropdown menu showing "kBtu/sq. ft./year".
- Measurement unit display for areas:** Dropdown menu showing "square feet". A red arrow points to this field with the text: "You can change the Units (SI or IP)".
- Significant figures for EUIs and areas:** Dropdown menu showing "0.02". A red arrow points to this field with the text: "You can change the number of decimal places displayed".
- Save Changes:** Button at the bottom left.

# Sharing Admin Page

Organizations LBNL 20

Settings **Sharing** Column Settings Column Mappings Data Quality Cycles Labels Sub-Organizations Members

Sharing Your Data Save Changes

**Selecting Fields to Share**

As the admin of your SEED instance you can control what data is shared throughout your organization and between your sub-organizations as well as what data is shared externally with the public-at-large. The subset of data you choose to share with the public can be different than the subset shared between your sub-organizations.

From the list below, select the fields that you want to: 1) share internally within your organization, and 2) share publicly with users outside your organization.

SHARE DATA WITH	TABLE NAME	FIELD NAME
<input type="checkbox"/>	<input type="text" value="Search table name"/>	<input type="text" value="Search field name"/>
<input type="checkbox"/>	PropertyState	Address Line 1
<input type="checkbox"/>	TaxLotState	Address Line 1 (Tax Lot)
<input type="checkbox"/>	PropertyState	Address Line 2
<input type="checkbox"/>	PropertyState	Building Certification
<input type="checkbox"/>	TaxLotState	City (Tax Lot)
<input type="checkbox"/>	PropertyState	Custom ID 1
<input type="checkbox"/>	PropertyState	Energy Alerts
<input type="checkbox"/>	PropertyState	ENERGY STAR Score
<input type="checkbox"/>	PropertyState	PM Generation Date
<input type="checkbox"/>	PropertyState	Gross Floor Area
<input type="checkbox"/>	TaxLotState	Jurisdiction Tax Lot ID (Tax Lot)
<input type="checkbox"/>	PropertyState	Associated Tax Lot ID

**Set a Query Threshold**

Enter the minimum threshold count of buildings that can be returned in a shared query. The building count threshold is important for allowing other organizations to perform statistical analysis on your data without revealing information about individual buildings.

Count #

Click on the **Sharing** link

The owner of a Parent Organization can select fields to view between Sub-Organizations.

The owner of a Parent Organization can set the query threshold for viewing records between Sub-Organizations.

# Column Settings Admin Page

This screen shows the mappings for the data in the database. Changes to the mappings here affect the existing data. For example, if the Display Name is changed, it will affect the field “display” name that is shown in the Inventory List and Detail screens for existing data. It does not affect the way that future fields will be mapped, so if field mappings are changed, they should probably also be changed in the Column Mappings screen. This screen also allows fields to be protected from being overwritten when new data is imported.

Settings   Sharing   **Column Settings**   Column Mappings   Data Quality   Cycles   Labels   Sub-Organizations   Members

**Column Settings** Save Changes

**Modifying Column Settings**

From the table below, you may modify the columns in the following ways: 1) change the display name of a column, 2) specify the data type of extra data columns, and 3) enable merge protection for specific columns. Normally when an imported record is merged into another record the newest value overwrites an older one. Merge protection prevents this, and is particularly useful for columns where you have manually edited values that you want to persist even after importing and merging new data.

View by Property   **View by Tax Lot**

DISPLAY NAME	COLUMN NAME	DATA TYPE	MERGE PROTECTION
<input type="text" value="Search display name"/>	<input type="text" value="Search column name"/>		
<input type="text" value="Additions"/>	Additions <b>extra data</b>	<input type="text"/>	<input type="checkbox"/>
<input type="text" value="Address"/>	Address <b>extra data</b>	<input type="text"/>	<input type="checkbox"/>
<input type="text" value="Address Line 1"/>	address_line_1	Text	<input type="checkbox"/>
<input type="text" value="Address Line 2"/>	address_line_2	Text	<input type="checkbox"/>
<input type="text" value="APN"/>	APN <b>extra data</b>	<input type="text"/>	<input type="checkbox"/>
<input type="text" value="Baths"/>	Baths <b>extra data</b>	<input type="text"/>	<input type="checkbox"/>
<input type="text" value="BLDGS"/>	BLDGS <b>extra data</b>	<input type="text"/>	<input type="checkbox"/>

Click on the **Column Settings** link

This is the name that is displayed, for example, in the Inventory List and Detail views, based on how the data was originally mapped. This name can be changed and it will affect all views of that field

Check the box in the “Merge Protection” column to prevent existing data in the “Master Record” from being updated when new data is imported. This is useful for fields where the data has been edited by hand, and could be overwritten when new data is imported which would overwrite the hand edited changes.

# Column Mappings Admin Page

This screen shows the stored default mappings for files that have been previously imported, which is the **default** mapping for these fields when new files are imported in the future. If problems are found in the mappings here, the bad mappings should be deleted so that when new files with these fields are imported, those same mapping mistakes will not be made again. Changing the mappings here does not affect existing data, it only affects the default mapping settings for data that will be imported in the future.

Settings | Sharing | Column Settings | **Column Mappings** | Data Quality | Cycles | Labels | Sub-Organizations | Members

**Column Mappings** Delete All Mappings

**Deleting Column Mappings**  
 From the table below, you may delete individual or all column mappings. These mappings are automatically created during file import and used to determine which SEED column to map the imported columns to.

View by Property (1026) | **View by Tax Lot (75)**

ORIGINATING COLUMN	MAPPED COLUMN	MAPPED COLUMN DISPLAY NAME	DELETE
<input type="text" value="Search originating column"/>	<input type="text" value="Search mapped column"/>	<input type="text" value="Search mapped column display name"/>	
Additions	Additions	Additions	<input type="button" value="X"/>
address_line_1	address_line_1	Address Line 1	<input type="button" value="X"/>
APN Unformatted	jurisdiction_tax_lot_id	Jurisdiction Tax Lot ID	<input type="button" value="X"/>
AYB_YearBuilt	year_built	year_built	<input type="button" value="X"/>
Baths	Baths	Baths	<input type="button" value="X"/>
Beds	BLDGS	BLDGS	<input type="button" value="X"/>
BLDGS	BLDGS	BLDGS	<input type="button" value="X"/>
BuildingAr	Building Name	Building Name	<input type="button" value="X"/>
Buildings	Building Status	Building Status	<input type="button" value="X"/>
city	city	City	<input type="button" value="X"/>
City	city	City	<input type="button" value="X"/>
Class	Class	Class	<input type="button" value="X"/>

Click on the **Column Mappings** link

Click the "Delete All Mappings" button to eliminate all the default mappings for files being imported in the future

Field name in the file being imported

Internal database field name

The field "Mapping", i.e., the field name displayed in the SEED screens

This mapping is incorrect and should be deleted

Here are two different fields mapped to the same correct field name



## Manage Data Quality Rules

- Create Data Quality rules
- Data Quality rules are run automatically by the program in the Mapping Review step
- Data Quality rules can be run “by hand” any time from the Actions menu in the Inventory List view

Click on the **Data Quality** link

Organizations **LBNL 302**

Settings Sharing Column Settings Column Mappings **Data Quality** Cycles Labels Sub-Organizations Members

**Data Quality** Restore Default Rules Reset All Rules Save Changes

**Modifying Data Quality Rules**  
 From the table below, select the rules that you want to: 1) enable/disable within your organization, 2) modify the minimum/maximum values to validate against on file upload, and 3) optionally assign or remove a label if the condition is not met.

Create a new rule

Separate rules are defined for Property and Tax Lot fields

**View by Property** **View by Tax Lot**

<input checked="" type="checkbox"/>	FIELD	DATA TYPE	REQUIRED	NOT NULL	MINIMUM	MAXIMUM	UNITS	SEVERITY	LABEL	DELETE
<input checked="" type="checkbox"/>	Address Line 1	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	(field must contain this text)			Error	DQ: Missing Address	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	ENERGY STAR Score	Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	100		Error	DQ: Low / No ENERGY STAR Score	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Gross Floor Area	Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	100	7000000	square fe	Error	DQ: Low / No Gross Floor Area	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Site EUI	Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	1000	kBtu/sq. f	Error	DQ: Low / No Site EUI	<input checked="" type="checkbox"/>

Restore Default Rules Reset All Rules Save Changes

# Data Quality Admin Page: Create a new rule

Click the **Create a new rule** button

Select the desired field from the pulldown list

View by Property	View by Tax Lot	FIELD	DATA TYPE	REQUIRED
<input checked="" type="checkbox"/>		<input type="text"/>	Number	<input type="checkbox"/>
<input checked="" type="checkbox"/>		Address Line 1 (Property)		
<input checked="" type="checkbox"/>		Address Line 2 (Property)		
<input checked="" type="checkbox"/>		Alert - Individual Monthly Meter Entry Is More Than 65 Days Long		
<input checked="" type="checkbox"/>		Alert - Meter Has Less Than 12 Full Calendar Months Of Data		
<input checked="" type="checkbox"/>		Alert - No Meters Are Associated With This Property		

A rule defines the criteria for CORRECT data. Any data that does not meet that criteria is considered either an Error or a Warning and labeled accordingly if labels are defined for the rule.

In the example below for the Text field “Alert - No Meters are Associated with this Property”, the correct data is “OK”. Any text other than “OK” is flagged as an error and given the label “DQ: Alert: No meters”

Set the Data Type

Check Required and/or Not Null

Enter Min/Max or Text to check

Units (optional)

Set to Error or Warning

Click + to add a label

Click the red X button to delete the rule

View by Property	View by Tax Lot	FIELD	DATA TYPE	REQUIRED	NOT NULL	MINIMUM	MAXIMUM	UNITS	SEVERITY	LABEL	DELETE	
<input checked="" type="checkbox"/>		Alert - No Meters Are	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OK			Error		<input type="button" value="+"/>	<input type="button" value="X"/>

DQ: Alert: No meters

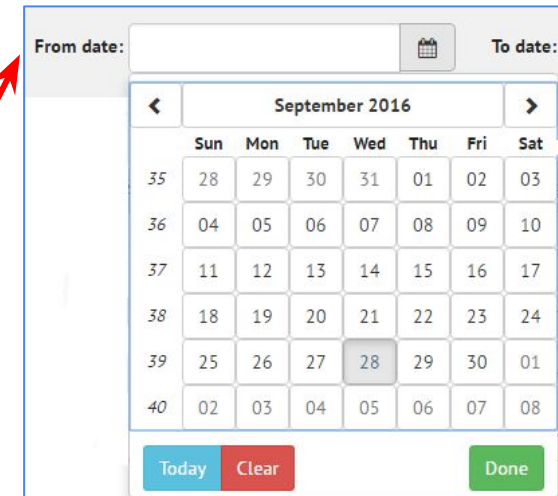
Add

View by Property	View by Tax Lot	FIELD	DATA TYPE	REQUIRED	NOT NULL	MINIMUM	MAXIMUM	UNITS	SEVERITY	LABEL	DELETE
<input checked="" type="checkbox"/>		Alert - No Meters Are	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OK			Error	DQ: Alert: No meters	<input type="button" value="X"/>
<input checked="" type="checkbox"/>		ENERGY STAR Score	Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10	100		Error	DQ: ENERGY STAR Score < 10, > 100	<input type="button" value="X"/>

Click the Save Changes button →

## Manage Cycles

- Create Date “cycles” such as Compliance cycles
- Assigned on data import
- Used to filter data views



Set the **From date** and **To date**

Click on the **Cycles** link

Type a name to create a new cycle

Settings   Sharing   Column Settings   Column Mappings   Data Quality   **Cycles**   Labels   Sub-Organizations   Members

Create new cycle      From date:    To date:   

**Existing Cycles**

NAME	FROM DATE	TO DATE	
2017 Compliance Cycle	01-01-2017	12-31-2017	<input type="button" value="edit"/>
2018 Compliance Cycle	01-01-2017	12-31-2017	<input type="button" value="edit"/>

# Labels Admin Page

- Labels can be defined in this Admin page
- They can also be defined “on the fly” in the Inventory List and Detail view as needed

Organizations **LBNL 302**

Settings Sharing Column Settings Column Mappings Data Quality Cycles **Labels** Sub-Organizations Members

Create new label  gray

**Existing Labels**

NAME	edit	X
> 10,000 < 50,000 SF	edit	X
< 10,000 SF	edit	X
> 50,000 SF	edit	X
Call	edit	X
Change of Ownership	edit	X
College/University	edit	X
Compliant	edit	X
DQ: Low / No ENERGY STAR Score	edit	X
DQ: Low / No Gross Floor Area	edit	X
DQ: Low / No Site EUI	edit	X
DQ: Missing Address	edit	X

**Click on the Labels link**

**You can create new labels**

**In this screen you can define as many labels as you need**

- A set of default labels are automatically generated (dark blue)
- The default labels can be edited or deleted

**You can Edit or Delete existing labels**

# Sub-Organizations Admin Page

SEED PLATFORM™ LBNL 21 ▾ +

← Organizations Parent Organization → LBNL 21

Settings Sharing Column Settings Column Mappings Data Quality Cycles Labels **Sub-Organizations** Members

**Sub-Organizations** Create a new sub-organization

Click on the **Sub-Organizations** link

SUB-ORGANIZATION NAME	OWNER NAME	OWNER EMAIL
LBNL 20	Robin LBNL 20	rdmitchell+20@lbl.gov
LBNL 2111	Robin LBNL 211	rdmitchell+211@lbl.gov

The owner of a Parent Organization can create Sub-Organizations

### Create a New Sub-Organization

**Sub-Org Name:**

**Invite an Owner:**

**Note 1:** Sub-organizations can not be deleted.

**Note 2:** Parent organization members are not automatically made members of sub-organizations.

The owner being invited to a Sub-Organization has to already be a member of the Parent Organization (and can be deleted from the Parent later)



# Parent / Sub-Organization Roles

The permissions for each Role in a Parent Organization and a Sub-Organization

	Parent	Sub Organization		
		Owner	Member	Viewer
Set fields for display between Sub-Org	X			
Create Sub Orgs	X			
Add Members	X To parent or at Sub org setup	X To own Suborg		
Remove Members	X In parent	X From own Sub org		
View Members	X In parent Owner(s) of suborg	X In own Sub org		
Change Settings <ul style="list-style-type: none"> <li>Rename Suborg</li> <li>Change member role</li> </ul>	X In parent	X In own Sub org		
Add Data (Create Datasets)	X	X	X	
Edit data	X All the Suborgs associated with it	X In own Sub org	X In own Sub org	
View data	X All the Suborgs associated with it	X In own Sub org	X In own Sub org	X In own Sub org

# Members Admin Page

You can invite new members to your organization

Organizations **LBNL 21**

Settings Sharing Column Settings Column Mappings Data Quality Cycles Labels Sub-Organizations **Members**

**Members** [Invite a new member](#)

MEMBER NAME	MEMBER EMAIL	MEMBER ROLE
<input type="text" value="member name"/>	<input type="text" value="member email"/>	<input type="text" value="member role"/>
Robin Mitchell		owner

Click on the **Members** link

Invite a New Member

**First Name:**

**Last Name:**

**Email Address:**

**Role:** 

- Member
- Owner**
- Viewer

You can set the role of the new member

When you click **Send Invite** the person will receive an email, asking them to set a password for their account

SEED PLATFORM™
LBNL 302 ▾

swagger
Hello, rdmitchell+302@lbl.gov [Django Logout](#) [Authorize](#)

## SEED API

v1 [Show/Hide](#) | [List Operations](#) | [Expand Operations](#)

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v2 [Show/Hide](#) | [List Operations](#) | [Expand Operations](#)

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**v2.1** [Show/Hide](#) | [List Operations](#) | [Expand Operations](#)

POST /api/v2.1/portfolio\_manager/report/

POST /api/v2.1/portfolio\_manager/template\_list/

GET /api/v2.1/properties/ Return all Properties available to user through specified org.

**Implementation Notes**  
Return all Properties available to user through specified org.

**Parameters**

Parameter	Value	Description	Parameter Type	Data Type
page	<input type="text"/>		query	string
per_page	<input type="text"/>		query	string
identifier	<input type="text"/>		query	string
address_line_1	<input type="text"/>		query	string
cycle	<input type="text"/>		query	string
property	<input type="text"/>		query	string
cycle_start	<input type="text"/>		query	string
cycle_end	<input type="text"/>		query	string
analysis_state	<input type="text"/>		query	string

**Response Messages**

HTTP Status Code	Reason	Response Model	Headers
200			

Try it out!

## Contact

### For SEED-Platform Users:

Please visit our User Support website for tutorials and documentation to help you learn how to use SEED-Platform.

<https://sites.google.com/a/lbl.gov/seed/>

There is also a link to the SEED-Platform Users forum, where you can connect with other users.

<https://groups.google.com/forum/#!forum/seed-platform-users>

For direct help on a specific problem, please email:

[SEED-Support@lists.lbl.gov](mailto:SEED-Support@lists.lbl.gov)

### For SEED-Platform Developers:

The Open Source code is available on the Github organization SEED-Platform:

<https://github.com/SEED-platform>

Please join the SEED-Platform Dev forum where you can connect with other developers.

<https://groups.google.com/forum/#!forum/seed-platform-dev>

## About SEED Platform™

The Standard Energy Efficiency Data (SEED)™ Platform is a software application that helps organizations easily manage data on the energy performance of large groups of buildings. Users can combine data from multiple sources, clean and validate it, and share the information with others. The software application provides an easy, flexible, and cost-effective method to improve the quality and availability of data to help demonstrate the economic and environmental benefits of energy efficiency, to implement programs, and to target investment activity.

[More details](#)

### Development Team:

Managed by: [National Renewable Energy Laboratory](#)

Funding from: [U.S. Department of Energy](#)

#### Version

2.3.0.68bdd74

← When reporting an issue, including the complete Version # is useful