

Standard Energy Efficiency Data Platform™



U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy



SEED PLATFORM™ 2.18

Updated
April 2023

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Contents: Organizations, API Documentation, Contact, About

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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)

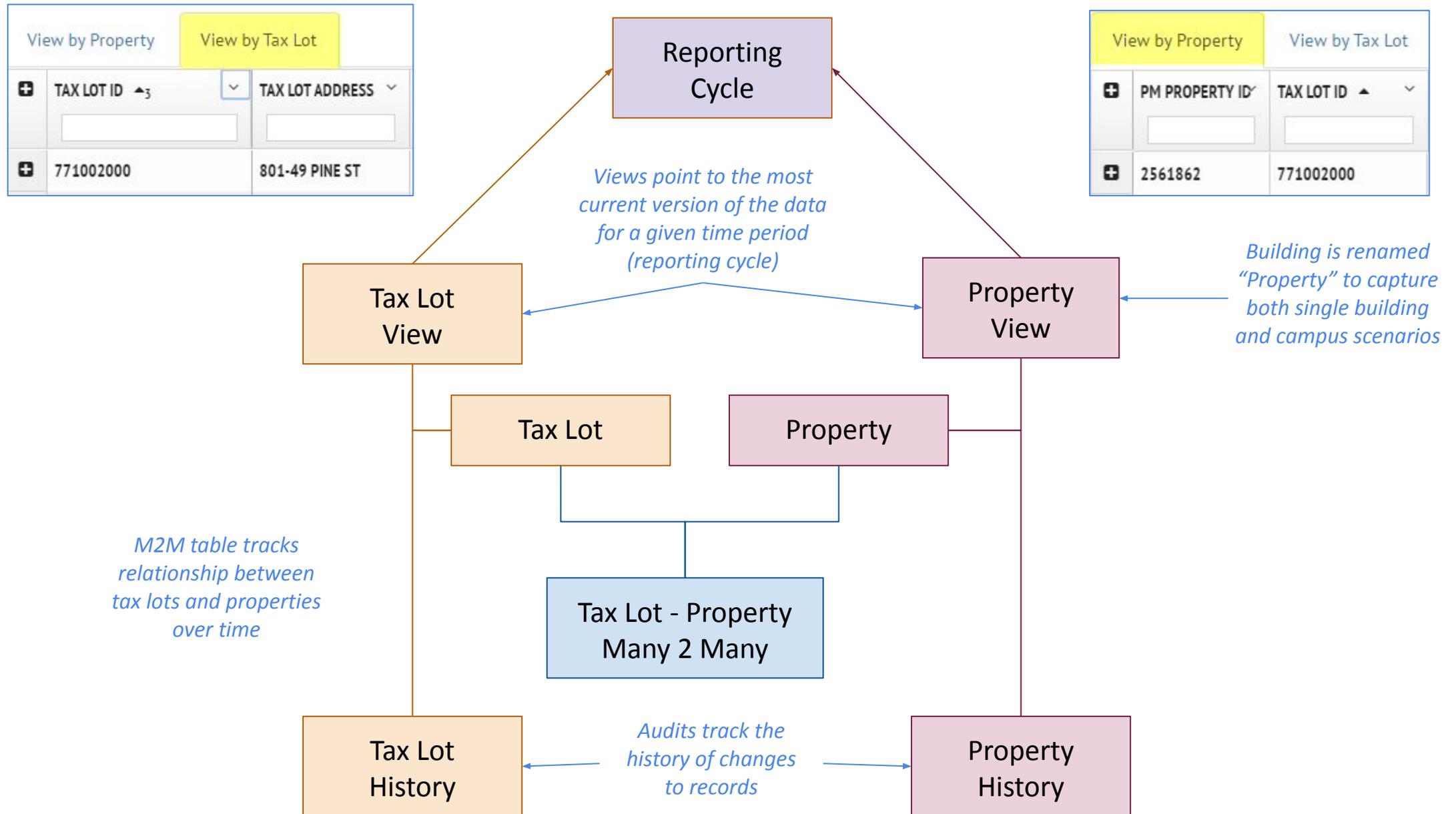
Standard Use Cases

Tasks to achieve outcomes:

- **Import data from different sources**
 - Tax assessor lists, including GIS information
 - Costar Data
 - Portfolio Manager Data, including meter data
 - GreenButton meter 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

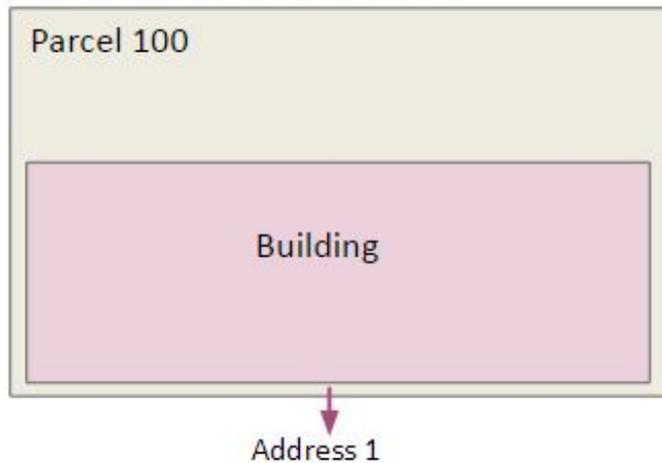
- View different states in time
- Many to many relationship between Tax Lot data and Building/Portfolio Manager data
- Viewing Tax Lot and Property data combined / rolled up



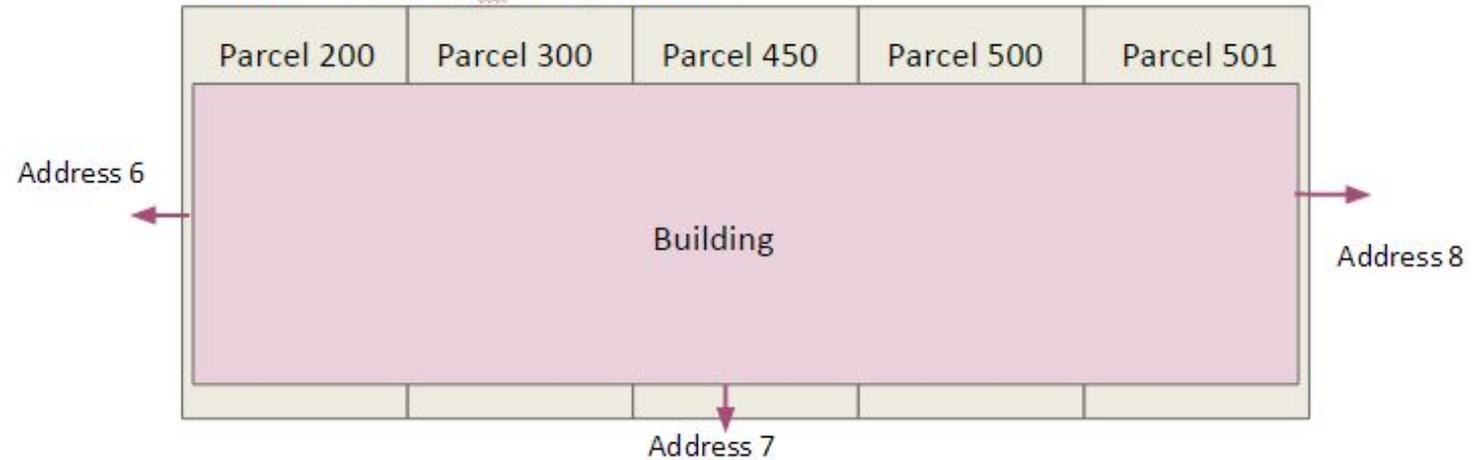
Physical reality of the data

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

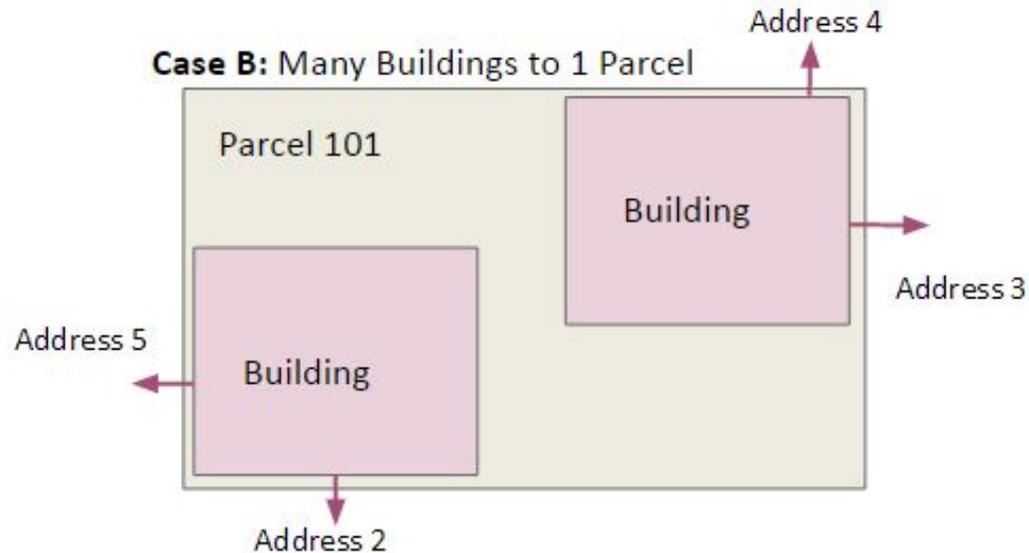
Case A: 1 Building to 1 Parcel



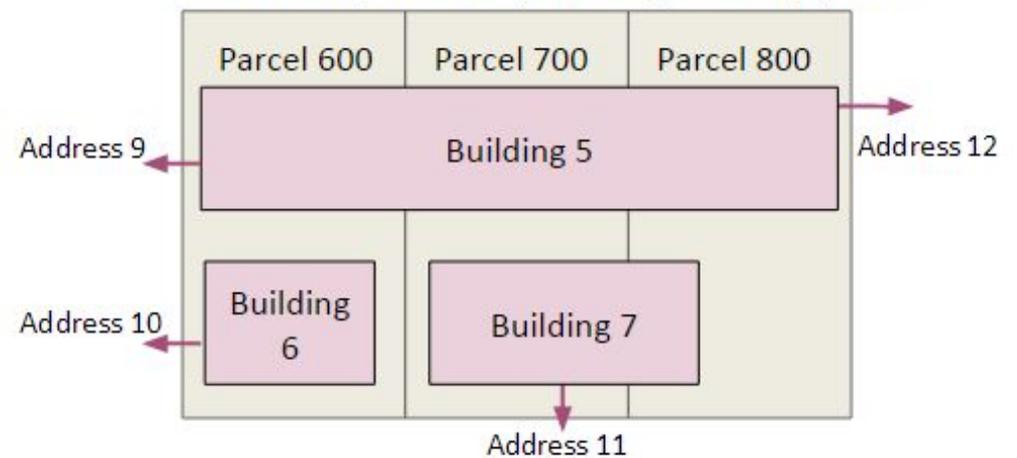
Case C: 1 Building to many Parcels



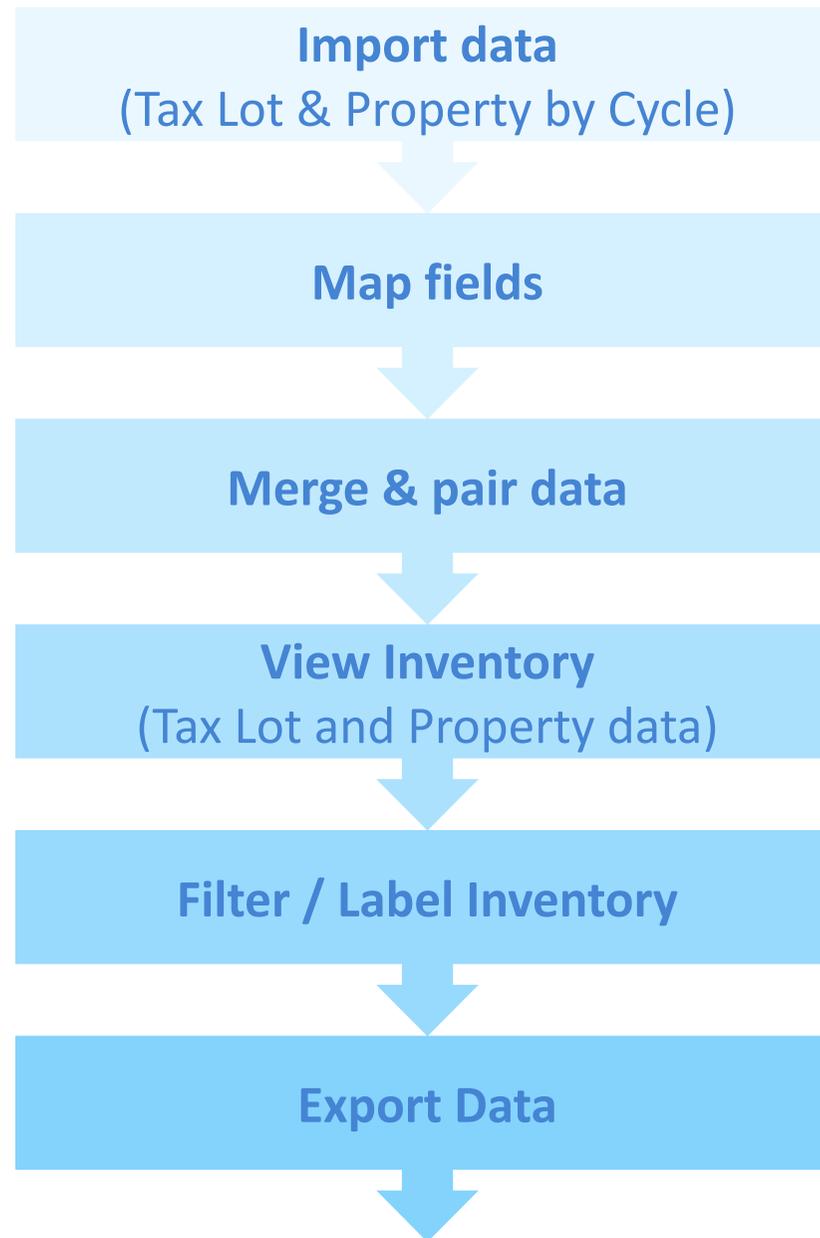
Case B: Many Buildings to 1 Parcel



Case D: Campus -- many buildings to many parcels



SEED Workflow



Home Page



SEED PLATFORM™

Current Organization: LBNL Test 200 ▾



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



The SEED Platform™

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 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.



Match your data

Match-up your buildings list with the Portfolio Manager dataset to tie building records together. SEED Platform will help you by auto-matching high confidence pairings and then provide you with tools to match the rest of your dataset.



Manage compliance

Use SEED Platform's flexible, easy-to-use labeling system and inventory groupings to track the status of data submission, review, and compliance.

You can download a sample data set (seed-sample-data.zip)

Getting Started

Getting Started Guide

Download Sample Data

Upload your Buildings List

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

Auto-Populate Sample Data

This button will populate your organization with the sample data

This button opens the dialog box to create a new data set to import data.

Navigation

Click to Expand and Contract the Navigation Side Bar

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

Insights: Click to view options for viewing aggregated data

Analyses (BETA): Click to see the results of Analyses run from Inventory

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

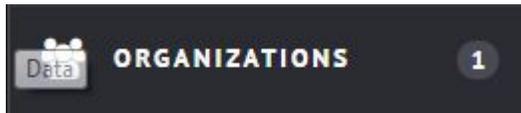
Documentation: Click to see an FAQ page

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

The program will open up a view of that Organization.

ORGANIZATION NAME	NUMBER OF PROPERTIES	NUMBER OF TAX LOTS	YOUR ROLE	ORGANIZATION OWNER(S)
LBNL 302	2018 Compliance Cycle: 13	2018 Compliance Cycle: 11	owner	Robin LBNL 302

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 LBNL 302	rdmitchell+302@lbl.gov	owner

View, Edit and Create Cycles

SEED PLATFORM™ Current Organization: LBNL 302 +

< Organizations LBNL 302

Column Settings Column Mappings **Cycles** Data Quality Derived Columns Email Templates Labels Members Program Setup Settings Sharing Sub-Organizations

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

Column Settings Column Mappings **Cycles** Data Quality Derived Columns Email Templates Labels Members Program Setup Settings Sharing Sub-Organizations

Create new cycle From date: To date: **Create Cycle**

Existing Cycles

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

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 Compliance Cycle	01-01-2017	12-31-2017	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
2018 Compliance Cycle	01-01-2017	12-31-2017	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

Existing Cycles

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

Uploading Data - There are many ways to start

The screenshot displays the SEED Platform™ user interface. On the left is a dark sidebar with navigation items: ROBIN LBNL 302, INVENTORY, DATA (highlighted with a 'Data' tooltip and a red arrow), ORGANIZATIONS, INSIGHTS, ANALYSES (BETA), API DOCUMENTATION, CONTACT, ABOUT, DOCUMENTATION, and LOGOUT. The main content area features a large header 'The SEED Platform™' with a background image of a city skyline at night. Below the header, there are three columns of text and icons: 'Match your data' with a double-headed arrow icon, and 'Manage compliance' with a green checkmark icon. A red arrow points from a text box to the 'DATA' button in the sidebar. The text box contains the instruction: 'Click the Data navigation button to see existing Data Sets or create a new one'. At the bottom of the page, a 'Getting Started' section contains four buttons: 'Getting Started Guide' (orange), 'Download Sample Data' (light blue), 'Upload your Buildings List' (dark blue, with a red arrow pointing to it), and 'Auto-Populate Sample Data' (green).

SEED PLATFORM™

Current Organization: LBNL 302

The SEED Platform™

Standard Energy Efficiency Data (SEED) Platform™ as a free software tool that provides a standardized format for collecting, storing and analyzing energy performance information about large portfolios.

Match your data

Match-up your buildings list with the Portfolio Manager dataset to tie building records together. SEED Platform will help you by auto-matching high confidence pairings and then provide you with tools to match the rest of your dataset.

Manage compliance

Use SEED Platform's flexible, easy-to-use labeling system and inventory groupings to track the status of data submission, review, and compliance.

Getting Started

- Getting Started Guide
- Download Sample Data
- Upload your Buildings List
- Auto-Populate Sample Data

Click the Data navigation button to see existing Data Sets or create a new one

OR
click the blue button labeled "Upload your buildings list"

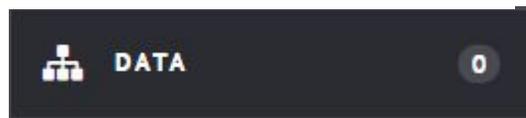


DATA

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					Create new data set
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

Create a New Data Set.

Data Set Name

Click the Create Data Set button

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
- Portfolio Manager downloaded spreadsheets

Upload GeoJSON file

- This option allows importing a GeoJSON file

Upload BuildingSync Data

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

Import Portfolio Manager Data

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

Uploading your data.

Property and Tax Lot Data | Meter Data

Cycle: 2020 Compliance Cycle

File types supported: .csv, .xls, .xlsx, .xml, .zip, .geojson, and .json.

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

Buttons: Upload a Spreadsheet, Upload a GeoJSON File, Upload BuildingSync Data, Import Portfolio Manager Data

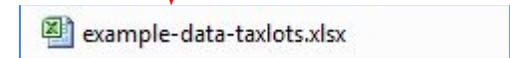
2018 Compliance Cycle
2018 Compliance Cycle
2019 Compliance Cycle
2020 Compliance Cycle

Select a **Cycle** (time period) to associate with the data (except Meter data, which is not associated with Cycles)

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



Uploading your data.

Property and Tax Lot Data | Meter Data

File types supported: .csv, .xls, .xlsx, .xml, .zip, .geojson, and .json.

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

Button: Upload Portfolio Manager Meter Usage

To upload monthly meter data, click on the Meter Data tab

Upload Portfolio Manager Meter Usage (XLS)

- From Portfolio Manager monthly data spreadsheet



Upload Data

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

Uploading your data.

Property and Tax Lot Data

Meter Data

Uploading 1 - example-data-ESPM.xlsx to cycle 2020 Compliance Cycle

0% Complete

Dismiss

Successful upload!

1 - example-data-ESPM.xlsx has been uploaded to 2020 Compliance Cycle, under cycle 2020 Compliance Cycle.

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

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

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

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

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.

Column Mapping Profiles can be used to help you easily and consistently map your data. Note that file header columns defined in the profile must match exactly (spaces, lowercase, uppercase, etc.) in order for the corresponding SEED column information to be used.

Field names for matching Properties: Custom ID 1, PM Property ID

Field names for matching Tax Lots: Jurisdiction Tax Lot ID

If there are fields in the datafile mapped to these names, the program will attempt to match on the corresponding values in existing records. All of these fields must have the same values between records for the records to match.

Matches within the same cycle will be merged together, while matches in different cycles will be associated for cross-cycle analysis.

Field names for geocoding properties: Address Line 1, Address Line 2, City, State, Postal Code

Field names for geocoding tax lots: Address Line 1, Address Line 2, City, State, Postal Code

Datafile fields mapped to these columns will have their corresponding values concatenated in the order listed to form a full address. This full address is made for each record and used for geocoding. **Note, geocoding requires at least 1 column is used and populated to construct full addresses.**

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 Matching fields for Property and Tax Lot data are specified in Organizations/**Column Settings** and are displayed here.

In this case, for **Property** data there are 2 matching fields:

- **Custom ID 1:** Jurisdiction ID
- **PM Property ID:** ID from ENERGY STAR Portfolio Manager

In this case, for **Tax Lot** data there is one matching field:

- **Jurisdiction Tax Lot ID:** Tax Assessor's Tax Parcel ID

The fields for geocoding properties, defined in **Organizations / Column Settings**, are also displayed here



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

You can click on this button to map all the SEED fields to the fields in the imported file and then change them as needed

This data is all from ENERGY STAR Portfolio Manager, so all the fields are mapped to the **Property** table

Check this box to omit (not import) a field

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

The Property ID from Portfolio Manager field was mapped to the reserved **Matching field name** to specify the fields the program will use to match records in files

- Property ID ⇒ **PM Property ID**

When the SEED Header fields are properly defined, you can make a “Column Mapping Profile” to save those settings by clicking the blue pencil icon. You will give it a name, and then it will appear in the pull down list for future use

Copy Data File Headers directly to SEED Headers

Map Your Data

Current Cycle: **2020 Compliance Cycle** Current Column Mapping Profile: **2020 ESPM Defaults** 2020 ESPM Defaults ▼ Apply Profile ✓ ✎

SEED
1 - example-data-ESPM.xlsx

Set all fields to: Property ▼ **Mapped Fields**

IS OMITTED	INVENTORY TYPE	SEED HEADER	MEASUREMENT UNITS	DATA FILE HEADER	RO
<input type="checkbox"/>	Property ▼	PM Property ID		Property ID	22
<input type="checkbox"/>	Property ▼	PM Parent Property ID		Parent Property ID	
	Property ▼	Property Name		Property Name	Un
	Property ▼	Address 1		Address 1	50
	Property ▼	City		City	Ru
	Property ▼	Custom ID 1		Rust Parcel ID	15
	Property ▼	Property Type		Property Type	Ho
	Property ▼	Gross Floor Area	square feet ▼	Gross Floor Area	12

Matching
In this case, the program will match two records if the data in both **PM Property ID** and **Custom ID 1** fields are the same between them

Mapping Fields

Mapping buildings for 1 - example-data-ESPM.xlsx

0% Complete

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

Copy Data File Headers directly to SEED Headers

Current Cycle: **2020 Compliance Cycle** Current Column Mapping Profile: **2020 ESPM Defaults** 2020 ESPM Defaults

SEED		1 - example-data-ESPM.xlsx			
IS OMITTED	INVENTORY TYPE	SEED HEADER	MEASUREMENT UNITS	DATA FILE HEADER	RO
<input type="checkbox"/>	Property	PM Property ID		Property ID	22
<input type="checkbox"/>	Property	PM Parent Property ID		Parent Property ID	
<input type="checkbox"/>	Property	Property Name		Property Name	Un
<input type="checkbox"/>	Property	Address 1		Address 1	50
<input type="checkbox"/>	Property	City		City	Ru
<input type="checkbox"/>	Property	Custom ID 1		Rust Parcel ID	15
<input type="checkbox"/>	Property	Property Type		Property Type	Ho
<input type="checkbox"/>	Property	Gross Floor Area	square feet	Gross Floor Area	12



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)

← Back to Mapping

27 8 Data Quality Results **Save Mappings**

View by Property

2020 Compliance Cycle 15 properties

City	Custom ID 1	Gross Floor Area (ft ²)	PM Parent Property ID	PM Property ID	Property Name
Rust	1552813	12,555.00		2264	University Inn
Rust	1552813	12,555.00		2264	University Inn
Rust	1552813	2,000.00		2266	University Inn Parking
Rust	11160509	23,543.00		1154623	Hilltop Retail
Rust	11160509	513,852.00		3020139	Hilltop Condos
Rust	11160509	55,121.00		4828379	Hilltop Offices
Rust	33366555; 33366125; ...	200,000.00		5233255	Montessori Day School
Rust	24651456		1311523	1311523	Lucky University
Rust	24651456	124,523.00	1311523	1311524	Grange Hall
Rust	24651455	421,351.00	1311523	1311525	Biology Hall

SEED displays the number of records

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

Mapping – Review – Data Quality Results

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

27  8  Data Quality Results

Data Quality Results

File Name: 1 - example-data-ESPM.xlsx
 Date Uploaded: April 28th 2023, 1:57:37 PM -07:00

PM PROPERTY ID	CUSTOM ID	FIELD	APPLIED LABEL	ERROR MESSAGE
PM Property ID	Custom ID	Field	Applied Label	Error Message
2264	1552813	Alert - Individual monthly meter entry is more than 65 days long	--	Alert - Individual monthly meter entry is more than 65 days long [Possible Issue] does not cc
2264	1552813	ENERGY STAR Score	--	ENERGY STAR Score is null
2264	1552813	Gross Floor Area	--	Gross Floor Area [12555.0 ft ²] < 50000.0 ft ²
2264	1552813	Site EUI	--	Site EUI [3.0] < 10.0
2264	1552813	ENERGY STAR Score	--	ENERGY STAR Score is null
2264	1552813	Gross Floor Area	--	Gross Floor Area [12555.0 ft ²] < 50000.0 ft ²
2266	1552813	Alert - Individual monthly meter entry is more than 65 days long	--	Alert - Individual monthly meter entry is more than 65 days long [Possible Issue] does not cc
2266	1552813	ENERGY STAR Score	--	ENERGY STAR Score is null
2266	1552813	Gross Floor Area	--	Gross Floor Area [2000.0 ft ²] < 50000.0 ft ²
2266	1552813	Site EUI	--	Site EUI is null

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

Export Close

 Data Cleansing Results.csv

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



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.

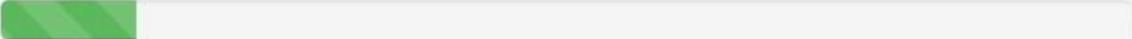
Finding inventory matches for 1 - example-data-ESPM.xlsx



60% Complete : Matching data

SEED is still working. Please do not refresh or leave this page. (Last updated at 03:16 PM)

Sub Progress:



12% Complete : Matching Data (6/6): Merging Views

Program checks to see if any records match within the file based on the matching fields set in Mapping, in this case PM Property ID and Custom ID 1.

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

Upload Complete - 1 - example-data-ESPM.xlsx

- Current cycle: 2020 Compliance Cycle
- Total rows in the import file: 15
- New properties: 14
- Merged properties within import file: 1

Geocoding Results for Properties

- Unsuccessful using external service: 14

Would you like to add another file?

Add another file

View my properties

Dismiss

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

The program reports on what was done with the records. In this case, the program imported 15 records and created 14 new records in the Property (two rows in the import were merged) 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

Uploading your data.

Property and Tax Lot Data

Meter Data

Cycle

2020 Compliance Cycle

Manage available cycles.

File types supported: .csv, .xls, .xlsx, .xml, .zip, .geojson, and .json.

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

Upload a Spreadsheet

Upload a GeoJSON File

Upload BuildingSync Data

Import Portfolio Manager Data

View by Property

View by Tax Lot

1-14

	Custom ID 1	PM Property ID	Property Type	Property Name
	1552813	2266	Hotel	University Inn Parking
	24651456	1311526	Fitness Center/Health ...	Rowling Gym
	13334485;23810533	1311527	College/University	East Computing Hall
	13334485;23810533	1311528	Residence	International House

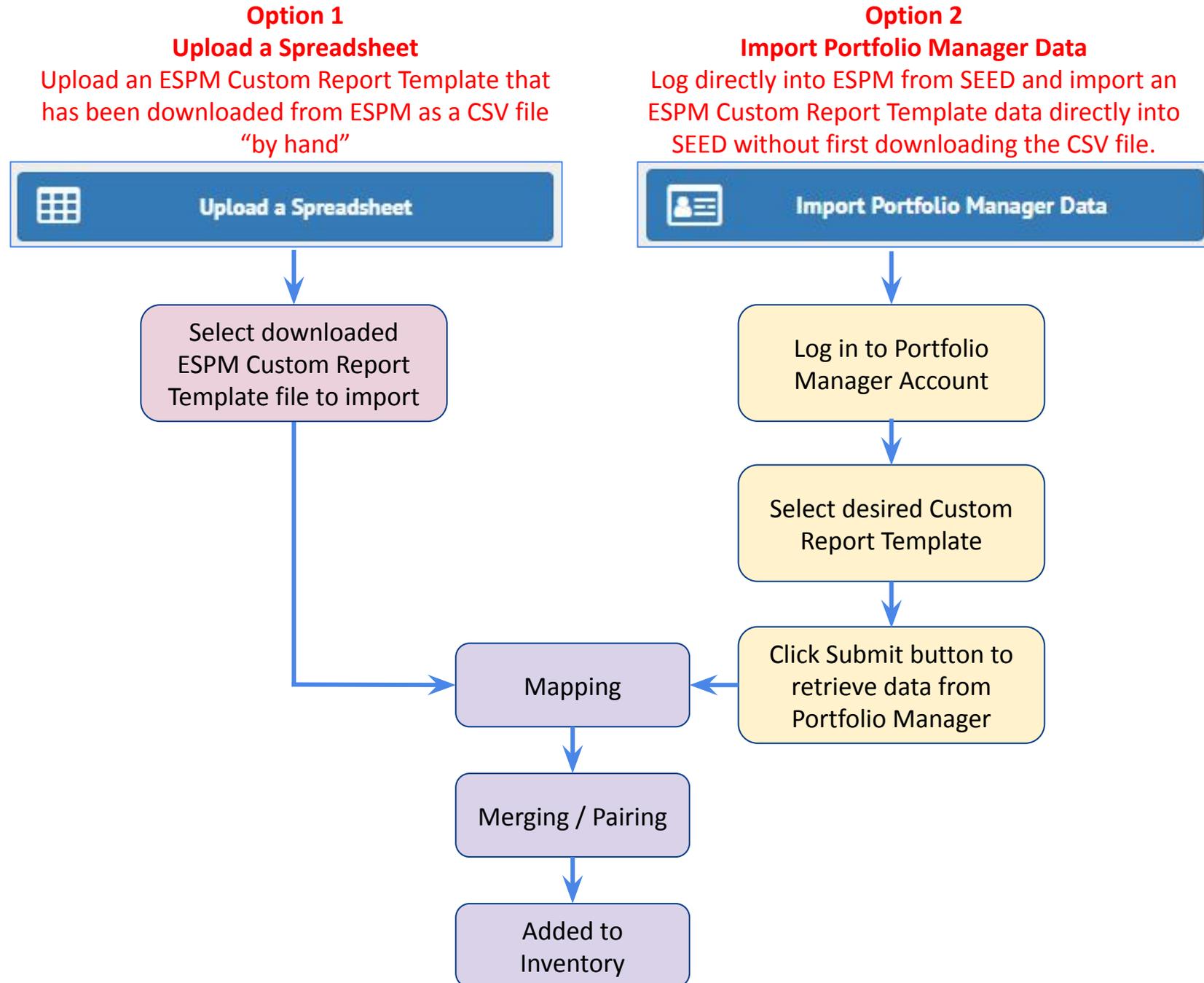
After a data file has been mapped and matched, the records can be viewed in the Inventory list view.

In this example, **Property** data was imported, so the data can be viewed in the **View by Property** 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 files that have been downloaded from Portfolio Manager

Uploading your data.

Property and Tax Lot Data **Meter Data**

Cycle: 2018 Compliance Cycle

Manage available cycles.

File types supported: .csv, .xls, .xlsx, .xml, .zip, .geojson, and .json.

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

Upload a Spreadsheet

Upload a GeoJSON File

Upload BuildingSync Data

Import Portfolio Manager Data

Select the appropriate Cycle

Click the **Upload a Spreadsheet** button to upload an ESPM Custom Report Template that has been exported from ESPM

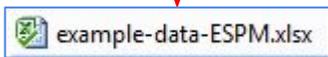
Successful upload!

example-data-taxlots.xlsx has been uploaded to 2018 Benchmarking Compliance, under cycle 2018 Compliance Cycle.

Continue to data mapping

Dismiss

Browse to the appropriate file to upload to SEED



Uploading your data.

Uploading example-data-properties.xlsx

45% saving data

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 Username: SEED_City_Test

Portfolio Manager Password:

Get Report Templates

Report Template Name: [Dropdown]

Cancel Submit

4 - Click **Get Report Templates** button

Portfolio Manager Username: SEED_City_Test

Portfolio Manager Password:

Get Report Templates

Report Template Name (14):

- Data Request:Abc
- Data Request:Abc
- Data Request:SEED City Test Report June 5 2018
- Data Request:opentech
- Portfolio Plus Meters
- Report with Meters
- SEED City Benchmarking Report
- SEED City Test Report**
- Data Request:SEED City Test Report April 24 2018
- Data Request:SEED City Test Report June 5 2018
- Data Request:SEED City Test Report April 24 - Test 2

5 - Select the desired Report Template

Portfolio Manager Username: SEED_City_Test

Portfolio Manager Password:

Get Report Templates

Report Template Name (14): SEED City Test Report

Cancel **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

SEED			1 - example-data-ESPM-UBID-NoAlerts.xlsx	
Set all fields to: <input type="text"/>			Mapped Fields	
INVENTORY TYPE	SEED HEADER	MEASUREMENT UNITS	DATA FILE HEADER	ROW 1
<input type="text" value="Property"/>	<input type="text" value="Building ID"/>		Building ID	100
<input type="text" value="Property"/>	<input type="text" value="UBID"/>		UBID	SRIY2TX6+2NR-SRIY2TX6+DS6-SRIY2TX6+F5Q
<input type="text" value="Property"/>	<input type="text" value="PM Property ID"/>		Property ID	2264
<input type="text" value="Property"/>	<input type="text" value="PM Parent Property ID"/>		Parent Property ID	
<input type="text" value="Property"/>	<input type="text" value="Property Name"/>		Property Name	University Inn
<input type="text" value="Property"/>	<input type="text" value="Address 1"/>		Address 1	50 Willow Ave SE
<input type="text" value="Property"/>	<input type="text" value="City"/>		City	Rust
<input type="text" value="Tax Lot"/>	<input type="text" value="Jurisdiction Tax Lot ID"/>		Rust Parcel ID	1552813
<input type="text" value="Property"/>	<input type="text" value="Property Type"/>		Property Type	Hotel
<input type="text" value="Property"/>	<input type="text" value="Gross Floor Area"/>	<input type="text" value="Square feet"/>	Gross Floor Area	12555

Gross Floor Area

- **Matching field - Property table**
- If you are mapping to a field called "Gross Floor Area" make sure to set the "Measurement Units". If this field is left blank, there will be problems later with the data.

Mapping Review - Portfolio Manager

← Back to Mapping

The fields mapped to **Property** are shown under the **Property tab**

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

42  Data Quality Results

Save Mappings

Click **Save Mappings** if mapping is correct

View by Property

2018 Compliance Cycle 14 properties

City	ENERGY STAR Score	PM Generation Date	Gross Floor Area (ft ²)	PM Parent Property ID	PM Property I...	Property Name	Property Type
Rust	75	2015-06-25 12:00 AM	12,555.00		2264	University Inn	Hotel
Rust		2015-06-25 12:00 AM	2,000.00		2266	University Inn Parking	Hotel
Rust	63	2015-03-02 12:00 AM	23,543.00		1154623	Hilltop Retail	Retail
Rust	1	2015-03-09 12:00 AM	513,852.00		3020139	Hilltop Condos	Multifamily Housing
Rust		2015-03-10 12:00 AM	55,121.00		4828379	Hilltop Offices	Office
Rust	55	2015-03-11 12:00 AM	200,000.00		5233255	Montessori Day School	K-12 School
Rust		2015-03-03 12:00 AM		1311523	1311523	Lucky University	College/University
Rust	77	2015-03-04 12:00 AM	124,523.00	1311523	1311524	Grange Hall	Performing Arts
Rust	43	2015-03-05 12:00 AM	421,351.00	1311523	1311525	Biology Hall	Laboratory
Rust	59	2015-03-06 12:00 AM	1,234.00	1311523	1311526	Rowling Gym	Fitness Center/Health .

View by Tax Lot

The fields mapped to **Tax Lot** are shown under the **Tax Lot tab**

2018 Compliance Cycle 16 tax lots

Jurisdiction Tax Lot ID
1552813
1552813
11160509
11160509
11160509

In this case only one field, Jurisdiction Tax Lot ID, was mapped to the Tax Lot table in the Mapping

In the final Tax Lot table, this Tax Lot ID will be one record and there will be 3 property records associated with it.



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)

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**.

Finding inventory matches.

Finding inventory matches for 1 - example-data-ESPM-UBID-NoAlerts.xlsx

50% Complete : Matching data

Sub Progress:

75% Complete : Matching Data (1/6): Filtering Duplicate States

Matching Results for file 1 - example-data-ESPM-UBID-NoAlerts.xlsx

- Current cycle: 2018 Compliance Cycle
- Total rows in the import file: 14
- New properties: 1
- Merged properties against existing records: 13
- Merged tax lots against existing records: 9
- Ignored tax lot duplicates within the import file: 7

The program reports the results of the matching.

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

Add another file

View my properties takes you Inventory List view

View my properties

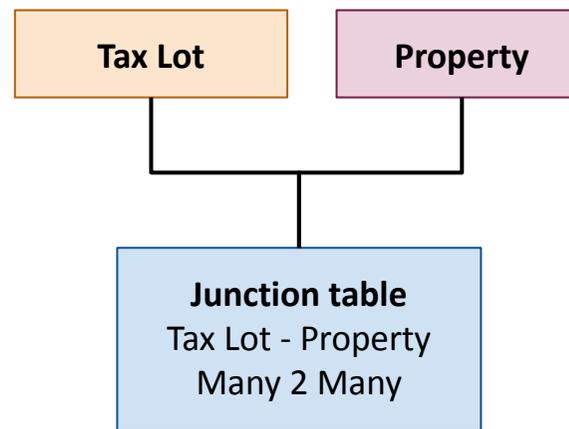
Dismiss



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)	Data Mapping	Data Pairing

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)	

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Current Organization: BPS Test ▾



Properties

[Properties List](#)[Properties List \(legacy\)](#)[Column List Profiles](#)[Reports](#)[Cross-Cycles](#)[Map](#)[Data](#)[Summary \(Beta\)](#)

Properties List: Displays the latest version of the Properties List view

Properties List (legacy): Displays the previous version of the Properties List view which will be deprecated at some point

Column List Profiles: Allows creation of multiple field lists with different fields selected

Reports: View data for the properties in graph form

Cross-Cycles: Allows viewing data across multiple cycles

Map: If the properties have been correctly geocoded, they will be displayed on a map based on those locations

Data: Links to **Insights**

Summary (Beta): Displays summary information about the records and fields by cycle

Properties List (Legacy)

This page shows the “Legacy” List view, which will be deprecated at some point

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Current Organization: LBNL 302

Organization

Properties

Properties List **Properties List (legacy)** Column List Profiles Reports Cross-Cycles Map Data Summary (Beta)

Select **Actions** to act on records

Select the Cycle

Cycle: 2018 Compliance Cycle

Two tabs

- Property
- Tax Lots

View by Property **View by Tax Lot**

Controls the fields displayed in the tab

Column List Profile: Property List View

Number of Property records for this cycle 12 properties

					PM Property ID	Jurisdiction Tax Lot ID	Address 1	Property Name	Property Type	Gross Floor Area (ft ²)	ENERGY STAR Score
+	✓	h	⚡	i	1154623	11160509	2700 Welstone Ave NE	Hilltop Retail	Retail	23,543.00	63
+	✓	h	⚡	i	1311523	24651456	11 Ninth Street	Lucky University	College/University		
+	✓	h	⚡	i	1311524	24651456	12 Ninth Street	Grange Hall	Performing Arts	124,523.00	77
+	✓	h	⚡	i	1311525	24651455	20 Tenth Street	Biology Hall	Laboratory	421,351.00	43
+	✓	h	⚡	i	1311526	24651456	35 Tenth Street	Rowling Gym	Fitness Center/Health ...	1,234.00	59

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 links to Meters for the record

This icon will link to Notes for the record

This icon indicates merged records

Properties List

See the next pages for details



Properties

Properties List

Properties List (legacy)

Column List Profiles

Reports

Cross-Cycles

Map

Data

Summary (Beta)

Cycle: 2019

Sorting By (in order): (from table below)

Column List Profile: Property Default Fields

Current Filters: (from table below)

Actions:

Filter By Label: Add a label

AND OR EXCLUDE

Filter Group: Bad Energystar



Properties with merged records

Properties with Notes

Properties with Meter Data

Expand to see labels for each property

View by Property

View by Tax Lot

1-9

PM Property ID	Property Name	Property Type	Gross Floor Area (ft ²)	Address Line 1
22178843	Medstar POB South To...	Hospital	76,319.00	106 IRVING ST NW
22178844	1801 Pennsylvania Ave...	Office	220,131.00	1801 PENNSYLVANIA A...
22178845	GSA: 300 E Street SW	Office	659,773.00	0300 E ST SW
22178846	Paul H.Nitze	Office	58,717.00	1740 MASSACHUSETT...
22482006	Hampton House	Multifamily	83,580.00	2700 CONNECTICUT A...
22178848	BuildingType-7033951...	Office	447,442.00	3303 Water St NW
22178849	15th and H Street Asso...	Multifamily	230,129.00	1428 H ST NW
22178850	Eastern Market	Food Service	29,906.00	635 NORTH CAROLINA ...

Click to see Detail View

Properties List - Upper Screen

Organization

SEED PLATFORM™

Current Organization: BPS Test +

Properties

Displays the fields controlling the current sort order

Select the Cycle

Properties List

Properties List (legacy) Column List Profiles Reports Cross-Cycles Map Data Summary (Beta)

Cycle: 2019

Sorting By (in order): Property Name asc (from table below)

Column List Profile: Property Default Fields

Current Filters: Gross Floor Area (ft²) > 100000 (from table below)

Actions:

Filter By Label: Compliant Add a label AND OR EXCLUDE

Filter Group: Compliant, > 100,000 SF

Select Actions to act on records

- Select All (9)
- Select None
- Selected Properties (0 selected)**
- Merge
- Delete
- Export
- Add/Remove Labels
- Data Quality Check
- Email
- Run Analysis (beta)
- Refresh Metadata
- Geocode
- Decode UBID/ULID
- Update Salesforce
- Options**
- Only Show Populated Columns

Controls the fields displayed in the View by Property tab

- Property Default Fields
- BETTER Results
- BPS Default
- Property Default Fields**

These are defined in Column List Profiles

Shows the current filters set for fields

Gross Floor Area (ft²)
>100000
220,131.00
659,773.00
127,991.00

Shows the current Labels that are being used as filters

- Compliant
- BETTER Analysis Compliant
- Compliant

Filter groups can be defined for a combination of Filters and Labels

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		PM Property ID	Jurisdiction Tax Lot ID (Tax Lot)	Address Line 1	Address (Tax Lot)	Property Type
+				5233255	33366125; 33366148; 33366555	521 Elm Street	521 Elm Street; 525 EL...	K-12 School
-					33366125		525 Elm Street	
-					33366148		530 Elm Street	
-					33366555		521 Elm Street	

View by Tax Lot

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

View by Property		View by Tax Lot		Jurisdiction Tax Lot ID	PM Property ID (Proper..)	Address	Address Line 1 (Proper..)	Parcel Owner
-				13334485	1311527; 1311528	93029 Wellington Blvd	93029 Wellington Blvd...	Lucky University
-					1311527		93029 Wellington Blvd	
-					1311528		93031 Wellington Blvd	
+				1552813	2264; 2266	050 Willow Ave SE	50 Willow Ave SE	U LLC
+				23810533	1311527; 1311528	94000 Wellington Blvd	93029 Wellington Blvd...	Lucky University
+				24651456	1311523; 1311524; 13...	11 Ninth Street	11 Ninth Street; 35 Ten...	Lucky University
+				33366125	5233255	525 Elm Street	521 Elm Street	Norton Schools
+				33366148	5233255	530 Elm Street	521 Elm Street	
+				33366555	5233255	521 Elm Street	521 Elm Street	Norton Schools

Hand Merging / Pairing Records

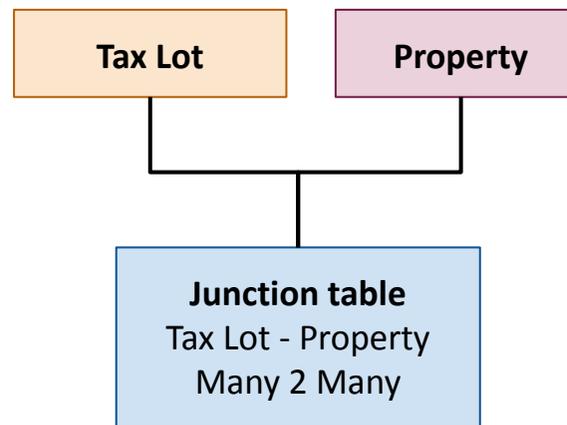
Merging (matching):

- 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

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

Actions:

- Select All (15)
- Select None
- Selected Properties (2 selected)**
- Merge**
- Delete
- Export
- Add/Remove Labels
- Data Quality Check
- Email
- Run Analysis (beta)
- Refresh Metadata
- Geocode
- Decode UBID/ULID

Step 2:
Select the **Merge** Action

Merge Multiple Properties

Resulting Merge

Address 1	Address Line 1	Alert - Individual mont...	Alert - Meter has less t...	Alert - No meters are
50 Willow Ave SE	50 Willow Ave SE	Ok	Ok	Ok

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

Address 1	Address Line 1	Alert - Individual mont...	Alert - Meter has less t...	Alert - No meter
50 Willow Ave SE	50 Willow Ave SE	Ok	Ok	Ok
50 Willow Ave SE	50 Willow Ave SE	Possible Issue	Possible Issue	Possible Issue

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

Cancel Merge

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

View by Property View by Tax Lot

PM Property ID	Address Line 1
2266	50 Willow Ave SE

Hand Un-Merging Records

Merged records can be viewed in the Inventory Detail view and can also be un-merged

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 Main record

Property Detail

Property : 50 Willow Ave SE

Actions

- Update with BuildingSync
- Update with Audit Template
- Export BuildingSync
- Export BuildingSync (Excel)
- Add/Remove Labels
- Run Analysis (beta)
- Unmerge Last**
- Merge and Link Matches
- Only Show Populated Columns

PM Property ID	Address Line 1	Jurisdiction Tax Lot ID
2266	50 Willow Ave SE	1552813
2264	50 Willow Ave SE	1552813

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

Unmerge Properties

Are you sure you want to unmerge these properties?

Cancel **Confirm**

View by Property | View by Tax Lot

PM Property ID	Address Line 1	Jurisdiction Tax Lot ID
2266	50 Willow Ave SE	1552813
2264	50 Willow Ave SE	1552813

Data Quality: Run from Inventory List

Actions:

- Select All (15)
- Select None
- Selected Properties (30 selected)**
- Merge
- Delete
- Export
- Add/Remove Labels
- Data Quality Check**
- Email
- Run Analysis (beta)
- Refresh Metadata
- Geocode
- Decode UBID/ULID
- Update Salesforce
- Options**
- Only Show Populated Columns

View by:

- PM Property

1311525 20 Tenth Str

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

Actions Filter by label: Add a label

- DQ: Alert: No meters
- DQ: ENERGY STAR Score < 10, > 100
- DQ: Gross Floor Area < 50000
- DQ: Site EUI < 10, > 1000

Cycle: 2018 Compliance Cycle

View by Property

PM Property

1311525 24651455 20 Tenth Str

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 | Properties List (legacy) | Column List Profiles | Reports | Cross-Cycles | Map | Data | Summary (Beta)

Cycle: 2018 Compliance Cycle | Sorting By (in order): (from table below)

Column List Profile: 2018 Compliance Few Fields | Current Filters: (from table below)

Filter By Label: Add a label | AND | OR | EXCLUDE

Filter Group: >50000 SF

Compliant

DQ: Alert - Monthly meter en...

DQ: Floor Area < 50000 SF

DQ: Site EUI Suspect (high ...

Energy Star Score > 25

Lucky University 2

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

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

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

Use Description ▾

- CONDO
- COMMERCIAL CONDO
- COMMERCIAL CONDO
- CONDO

Use Description ▾

- CONDO
- CONDO
- CONDO
- CONDO

ENERGY STAR Score ▾	Site EUI ▲ ▾
<input type="text" value=">=50,<=75"/>	<input type="text" value=">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

The screenshot shows a software interface with a filter box at the top. The filter box includes a 'Filter By Label' section with 'Compliant' selected, and filter operators 'AND', 'OR', and 'EXCLUDE'. Below the filter box is a table of property records. The table has columns for 'PM Property ID', 'Address Line 1', 'Jurisdiction Tax Lot ID', 'Address (Tax Lot)', and 'Property Type'. Two records are visible, both with labels '>50000 SF' and 'Compliant'. A red arrow points from the 'Compliant' label in the filter box to the 'Compliant' label in the table. Another red arrow points from the 'information' icon in the table to the detail view.

PM Property ID	Address Line 1	Jurisdiction Tax Lot ID	Address (Tax Lot)	Property Type
5233255	521 Elm Street	33366125; 33366148; ...	521 Elm Street; 525 EL...	K-12 School
1311525	20 Tenth Street			Laboratory

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

The detail view for 'Property : 521 Elm Street' shows the following information:

- Actions: [Dropdown]
- Cycle: 2018 Compliance Cycle
- Labels: >50000 SF, Compliant
- Detail Column List Profile: Property Detail Fields

Field	Main
City	Rust
Created	2020-10-26 3:51 PM

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 fits the criteria for both Suspect Site EUI and Property Name to Lucky University

Actions: Filter By Label: Lucky University 2 x DQ: Site EUI Suspect (high or low) x Add a label **AND** OR EXCLUDE

Filter Group:

View by Property View by Tax Lot Column List Profile: Property List View 1-1 < >

PM Property ID	Address Line 1	Address (Tax Lot)	Property Type	Site EUI (kBtu/ft ² /year)	ENERGY STAR Score	Property Name
1311523	11 Ninth Street	11 Ninth Street	College/University	1,202.00	23	Lucky University

Filter Operator == **OR**: Shows records that have at least one of the labels in the Filter by Label box

Actions: Filter By Label: Lucky University 2 x DQ: Site EUI Suspect (high or low) x Add a label AND **OR** EXCLUDE

Filter Group:

View by Property View by Tax Lot Column List Profile: Property List View

PM Property ID	Address Line 1	Address (Tax Lot)	Property Type	Site EUI (kBtu/ft ² /year)	ENERGY STAR Score	Property Name
1311525	20 Tenth Street		Laboratory	84.00	56	Biology Hall
1311527	93029 Wellington...	93029 Wellington Blvd...	College/University	45.00	56	East Computing Hall
1311524		11 Ninth Street	Performing Arts	219.00	99	Grange Hall
3020139	2655 Welstone A...	2655 Welstone Ave NE	Multifamily Housing	652.30	25	Hilltop Condos
1311528	93031 Wellington...	93029 Wellington Blvd...	Residence		55	International House
1311523	11 Ninth Street	11 Ninth Street	College/University	1,202.00	23	Lucky University
1311526	35 Tenth Street	11 Ninth Street	Fitness Center/Health ...	72.00	24	Rowling Gym

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: **Compliant** **EXCLUDE**

Filter Group: Column List Profile: Property List View

View by Property View by Tax Lot

					PM Property ID	Address Line 1	Address (Tax Lot)	Property Type	Site EUI (kBtu/ft ² /year)	ENERG
						456 Main St		Office		
					3020139	2655 Welstone Ave NE	2655 Welstone Ave NE	Multifamily Housing	652.30	25
					1311523	11 Ninth Street	11 Ninth Street	College/University	1,202.00	23
					1311526	35 Tenth Street	11 Ninth Street	Fitness Center/Health ...	72.00	24
					6798444	295444 Moser Lane		Social Meeting Hall	110.00	22

None of these records have the label "Compliant" attached to them

Filter Groups

Filter Groups has been added in order to save filtering options

- Filter the data, using the field filter inputs or labels, and assign that set of filters a Filter Group name

Properties

Properties List | Properties List (legacy) | Column List Profiles | Reports | Cross-Cycles | Map | Data | Summary (Beta)

Cycle: 2018 Compliance Cycle | Sorting By (in order): (from table below)

Column List Profile: 2018 Compliance Year Property Fields | Current Filters: Gross Floor Area (ft²) > 50000

Actions: | Filter By Label: Energy Star Score > 25 | Add a label | AND | OR | EXCLUDE

Filter Group: Energy Star Score > 25, Floor area > 50k

View by Property | View by Tax Lot

						PM Property ID	ENERGY STAR Score	Gross Floor Area (ft²)	Property Name
								>50000	
						5233255	55	200,000.00	Montessori Day School
						1311528	55	482,215.00	International House
						4828379	55	55,121.00	Hilltop Offices
						1311524	99	124,523.00	Grange Hall
						1311525	43	421,351.00	Biology Hall

Filter on labels

Name that combinations of filters as a Filter Group

Filter on fields

Rename Filter Group

Delete Filter Group

Save Filter Group

New Filter Group

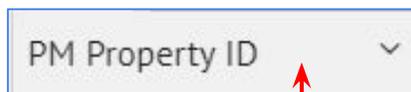


You can sort in two different ways

- 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



“Original” unsorted



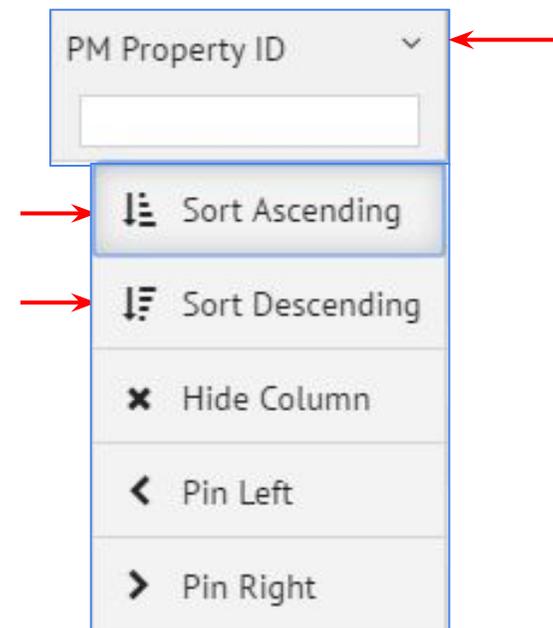
Ascending sort



Descending sort

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

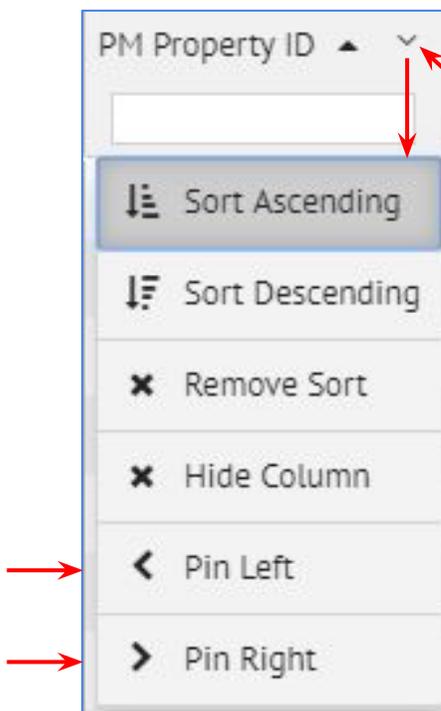
Using this Sort option allows hierarchical sorting



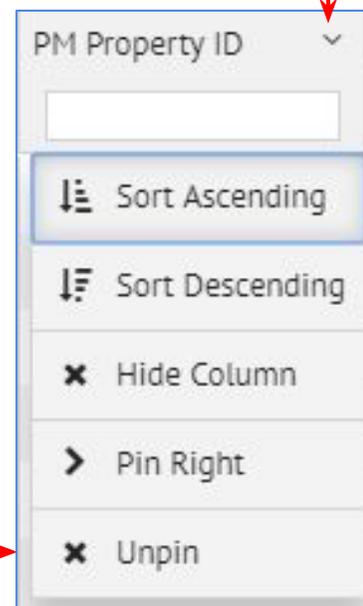
Pin Columns

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

A screenshot of the 'Properties' interface showing the 'Column List Profiles' tab. Below the header, there is a 'Column Order/Visibility' section with a table of columns. The 'PM Property ID' column is pinned to the right side, indicated by a blue pin icon.

✓	Column Name	
✓	PM Property ID	
✓	Jurisdiction Tax Lot ID	tax lot
✓	Address Line 1 (Property)	

Column List Profiles also has feature to pin columns to the right side

Save Column List Profile

Column List Profiles, 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

- **Column List Profiles**

For both List and Detail view, there is a new option called “Column List Profiles” which allows the currently highlighted fields to be saved to a name, which then appears in a pulldown list in both the Inventory List and Detail views.



It is possible to save separate (and multiple) Column List Profiles 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

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.

Create Settings Profile

Profile Name

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

2 - Name the Column List Profile if none exist.

Actions:

- Select All (5)
- Select None
- Selected Properties (0 selected)**
- Merge
- Delete
- Export
- Add/Remove Labels
- Data Quality Check
- Email
- Run Analysis (beta)
- Refresh Metadata
- Geocode
- Decode UBID/ULID
- Update Salesforce
- Options**
- Only Show Populated Columns**

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?

A dialog box will 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

Column List Profile:

Actions:

	Address Line 1	Gross Floor Area (ft ²)	Owner
	106 IRVING ST NW	76,319.00	WASHINGTON HOSPIT..

These fields are now what is displayed in the List View with the default name for the **Column List Profile**

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

List View - Column List Profiles

- Displays all possible fields for both Tax Lot and Property
- Tax Lot and Property Column List Profiles can be different
- Shows 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 Column List Profile (see next page)

Properties

Properties List
Properties List (beta)
Column List Profiles
Reports
Cross-Cycles
Map

Column Order/Visibility
Column List Profile: Property List View
✓
📄
✕
✎

Tax Lots List
Tax Lots List (legacy)
Column List Profiles
Reports
Cross-Cycles
Map
Data
Summary (Beta)

Column Order/Visibility
Column List Profile: BPS Tax Lot Default Fields
✓
📄
✕
✎

Add Shared Tax Lots

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

There are 156 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	pm_property_id
✓	📄	Address Line 1	
✓	📄	City	
✓	📄	Total GHG Emissions Intensity (Property) property	
✓	📄	Total GHG Emissions (Property) property	
✓	📄	Delta GHG Emissions (Property) property	
✓	📄	Number Properties	
✓	📄	Postal Code	

Enter values to search the list of fields

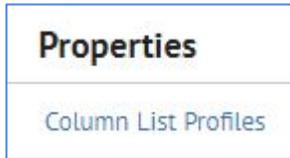
Shows which fields are pinned left

Can set more fields to be pinned left

Column List 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 Column List Profile, or to make a new one, click the Column List Profiles link on either the Properties or Tax Lot List View

Properties

Properties List Properties List (legacy) **Column List Profiles** Reports Cross-Cycles Map Data Summary (Beta)

Column Order/Visibility Column List Profile: Property Default Fields

Save Delete

There are 156 columns of data available to you.

Select columns from the list below to make them appear in your Property 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
✓	PM Property ID
✓	Property Name
✓	Property Type
✓	ENERGY STAR Score
✓	Delta GHG Emissions

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**

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 – Column List Profiles – Reorder Columns

✓		Column Name
✓	📌	PM Property ID
✓	⌵	Jurisdiction Tax Lot ID tax lot
✓	⌵	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) tax lot
✓	⌵	Address Line 1 (Tax Lot) tax lot

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) tax lot
✓	⌵	PM Release Date

List View – Reports Overview

Properties

Properties List | Properties List (beta) | Column List Profiles | Reports | Cross-Cycles | Map

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

Select criteria to graph

Date ranges for reporting based on Cycles

X Axis (Energy data)

Y Axis (Building Characteristic)

Click Update Charts

From first date of: 2012 Compliance Year | Until last date of: 2012 Compliance Year | X Axis: Site EUI | Y Axis: Gross Floor Area | Update Charts

The pulldown list shows the Cycles for the organization

X Axis: Site EUI

- Site EUI
- Source EUI
- Weather Norm. Site EUI
- Weather Norm. Source EUI
- Energy Star Score

Y Axis: Gross Floor Area

- Gross Floor Area
- Building Classification
- Year Built

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)

X Axis: Site EUI ▾

- Site EUI
- Source EUI
- Weather Norm. Site EUI
- Weather Norm. Source EUI
- Energy Star Score

Y Axis: Gross Floor Area ▾

- Gross Floor Area
- Building Classification
- Year Built

Mapped Fields

SEED HEADER	DATA FILE HEADER
Site EUI	Site EUI (kBtu/ft2)
Source EUI	Source EUI (kBtu/ft2)
Site EUI Weather Normalized	Weather Normalized Site EUI (kBtu/ft2)
Source EUI Weather Normalized	Weather Normalized Source EUI (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

Scatter Plot with all buildings

Bar Graph with Median Values

Property Reports

From first date of: 2017 Compliance

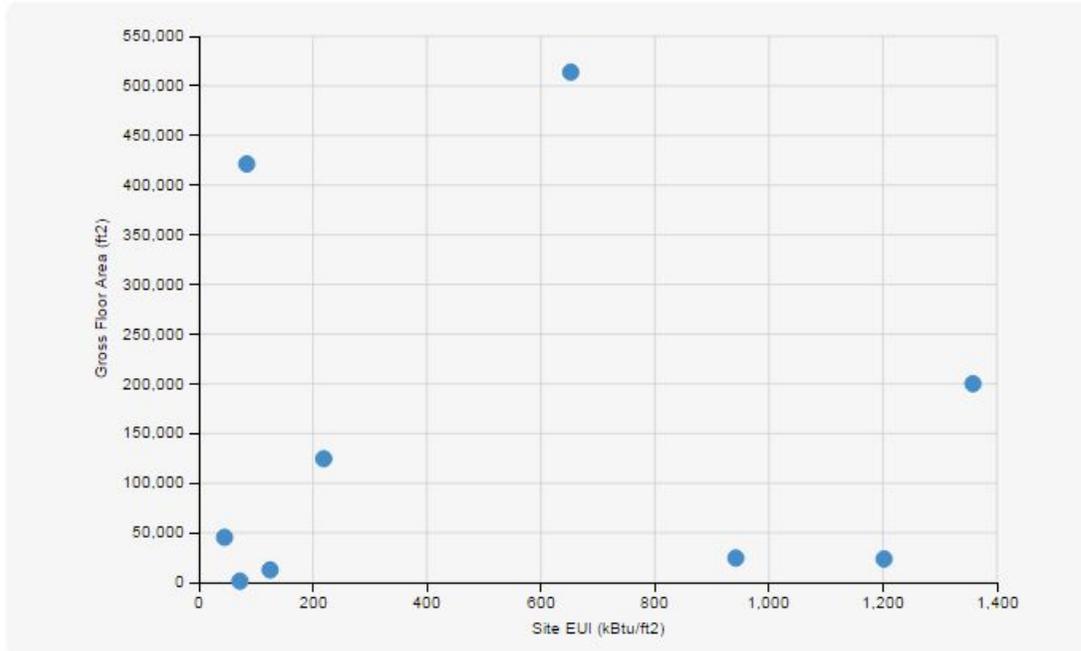
Until last date of: 2017 Compliance

X Axis: Site EUI

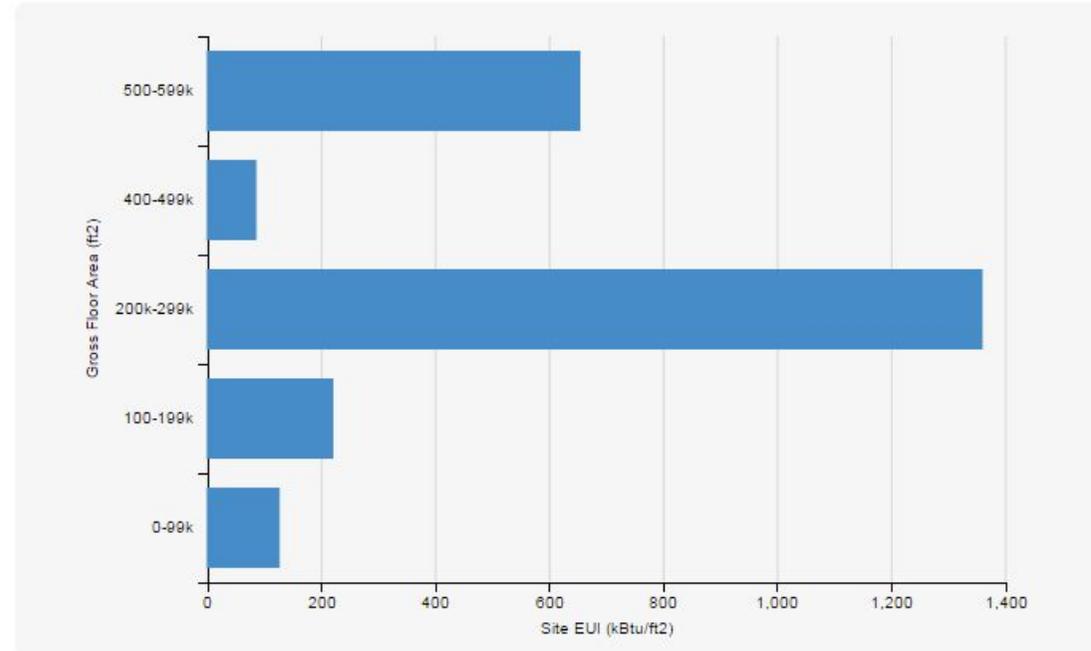
Y Axis: Gross Floor Area

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

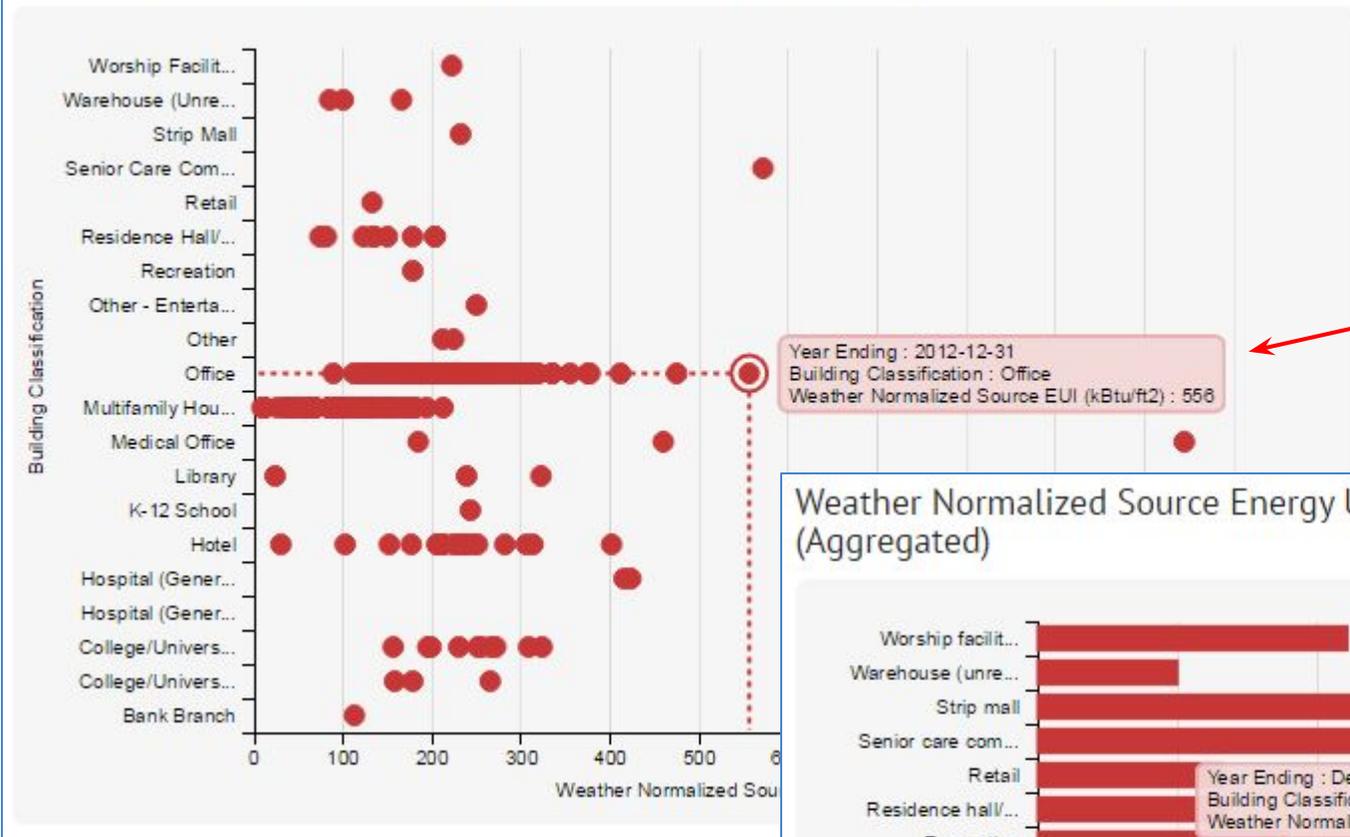
Year Ending	Properties with Data	Total Properties
■ 2017	9	12

Program reports # data points actually used for graphs



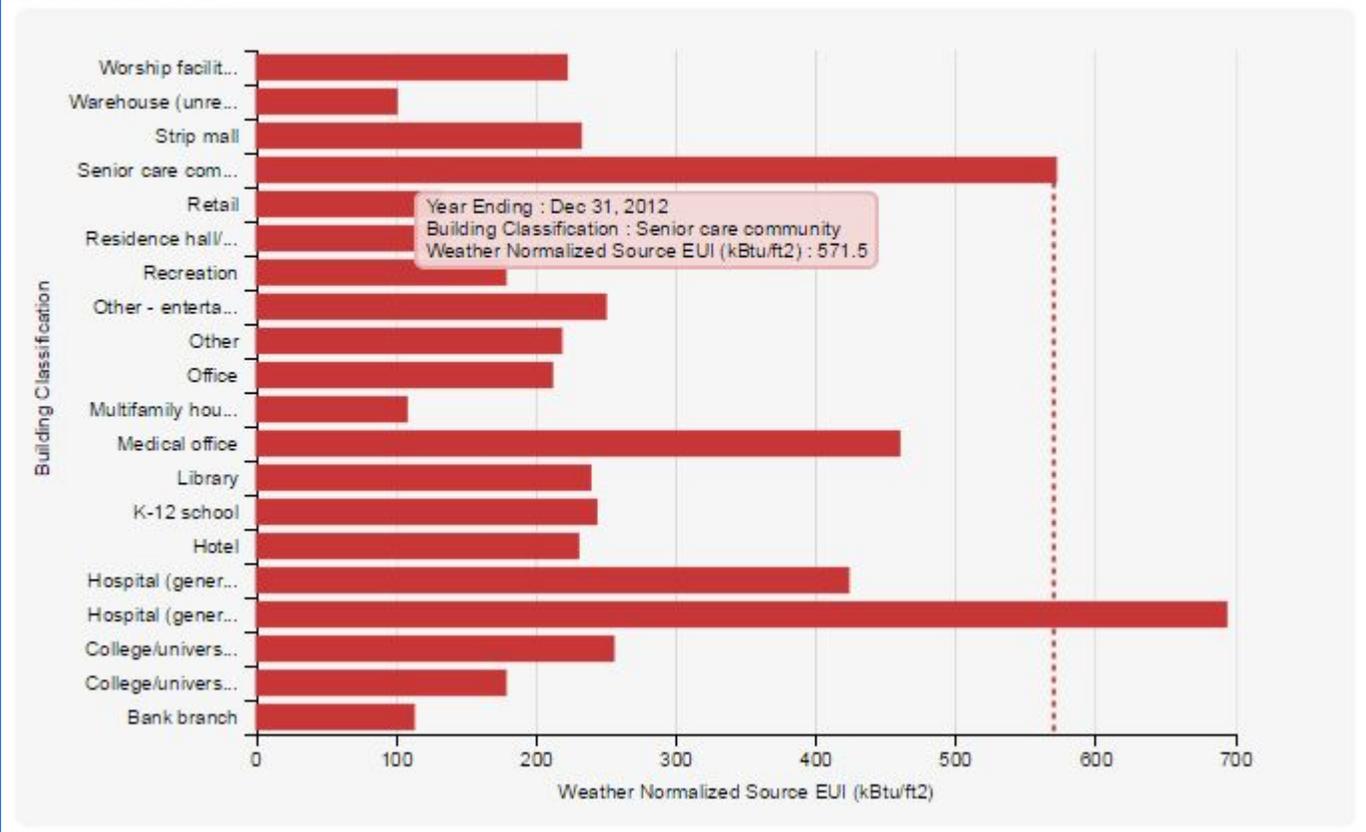
List View – Reports (cont'd)

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)

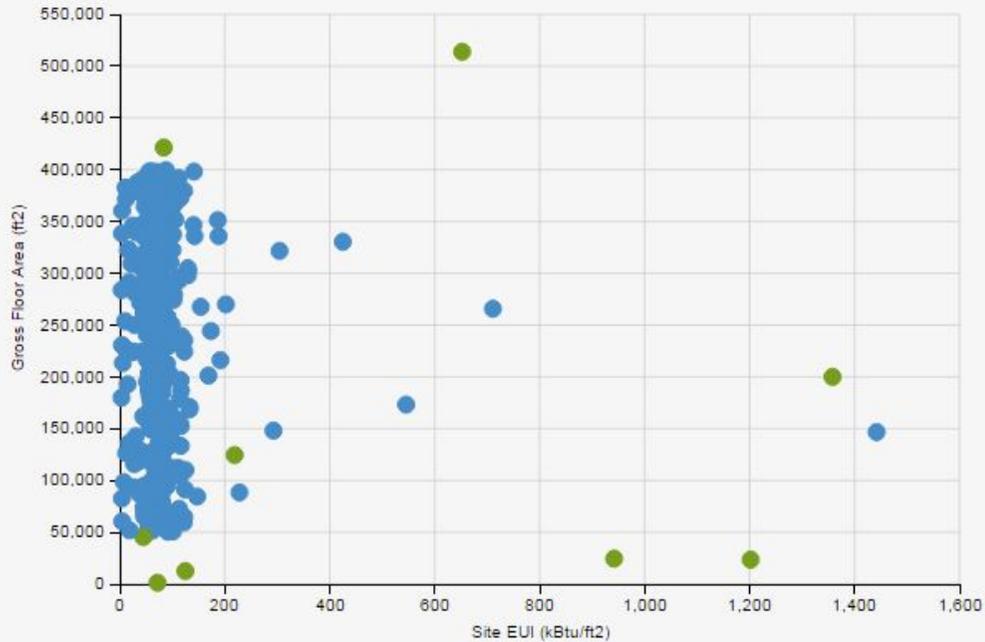




List View – Reports - Multiple Years of Data

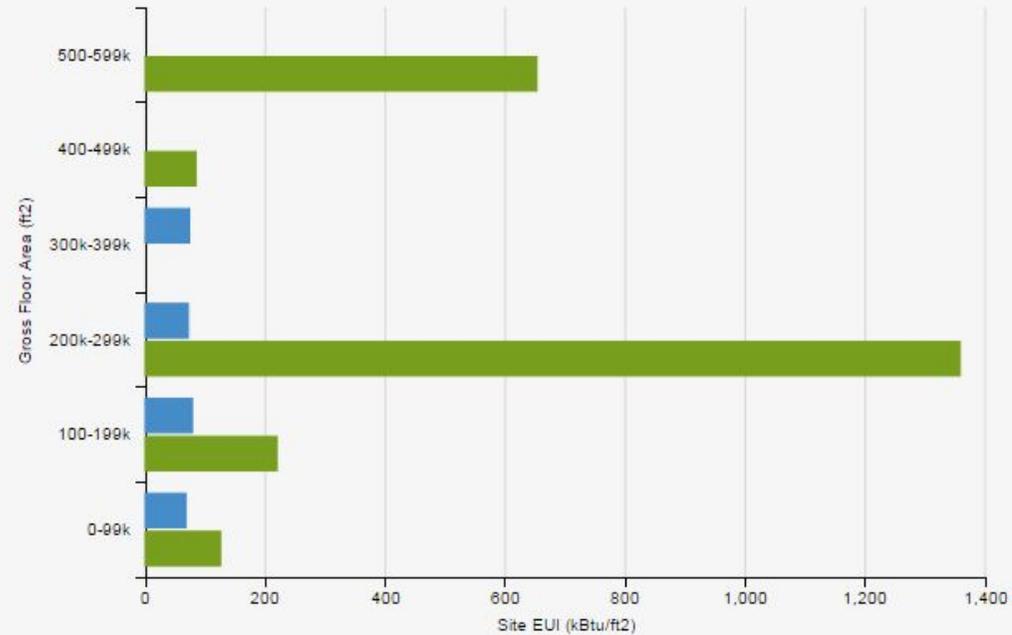
Multiple years of data
(based on Cycles)

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

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

Cycle: 2018 Compliance Cycle

Column List Profile: 2018 Compliance Few Fields

Actions:

- Select All (15)
- Select None
- Selected Properties (2 selected)**
- Merge
- Delete
- Export
- Add/Remove Labels**
- Data Quality Check
- Email
- Run Analysis (beta)
- Refresh Metadata
- Geocode
- Decode UBID/ULID
- Update Salesforce
- Options**
- Only Show Populated Columns

+	✓	🔗	🗨️	⚡	📄	📍	🏠	🏢	🏬	🏡	🎓
+	✓	🔗	🗨️	⚡	📄	📍	🏠	Hilltop Condos	25	Multifamily Housing	513,852.00
+	✓	🔗	🗨️	⚡	📄	📍	🏢	Hilltop Offices	55	Office	55,121.00
+	✓	🔗	🗨️	⚡	📄	📍	🏬	Hilltop Retail	67	Retail	23,543.00
+	✓	🔗	🗨️	⚡	📄	📍	🏡	International House	1311528	Residence	482,215.00
+	✓	🔗	🗨️	⚡	📄	📍	🎓	Lucky University	23	College/University	23,543.00

Add/Remove Labels

Create new label

Label Name gray Show in List

Add or remove labels from 2 selected properties

- DQ: Low or No Site EUI**
- DQ: No Custom ID**
- DQ: Site EUI Suspect (high or low)**
- DQ: Suspect Floor Area**
- DQ: Suspect Source EUI (low or high)**
- ESPM Data Submitted**
- Elm Street**

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

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. Check the “Show in List” box to see the label in the Inventory List
8. Click the **Create Label** button
9. The new label is added to the list of Labels
10. Click the **Add** button for the label you just created
11. 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*)

View by Property		View by Tax Lot		PM Property ID	Property Type
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1311527	College/University
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1311523	College/University

Actions:

- Select All (2)
- Select None
- Selected Properties (5 selected)**
- Merge
- Delete
- Export
- Add/Remove Labels**
- Data Quality Check
- Email
- Run Analysis (beta)
- Refresh Metadata
- Geocode

Add/Remove Labels

Create new label: College/University green Show in List **Create Label**

Add or remove labels:

- Blank Site EUI green Add
- Blank Site EUI New red Add
- Call gray Add
- Call orange Add
- Call light blue Add
- Call blue Add

Add or remove labels from 2 selected properties

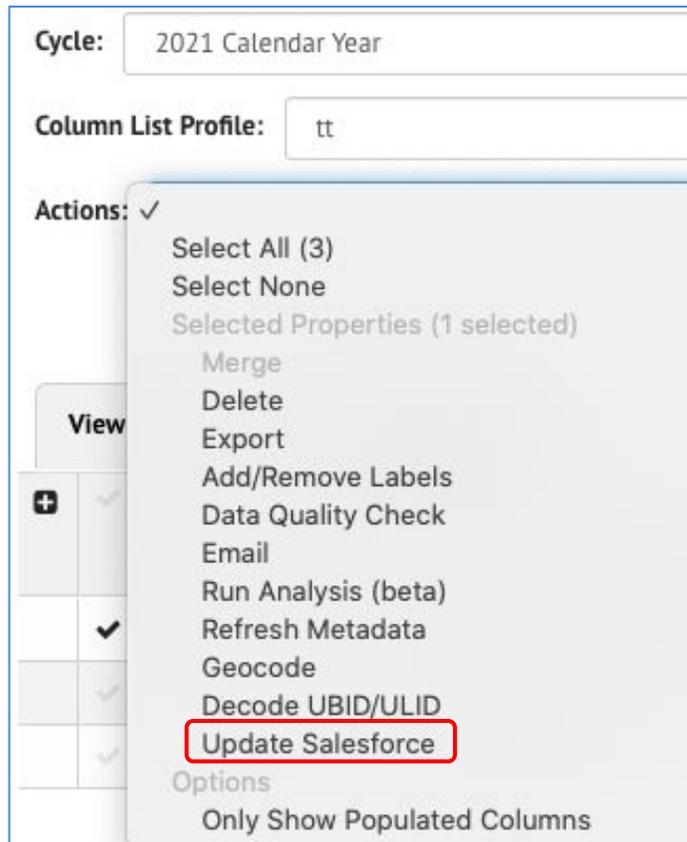
College/University green **Add**

Call gray Add

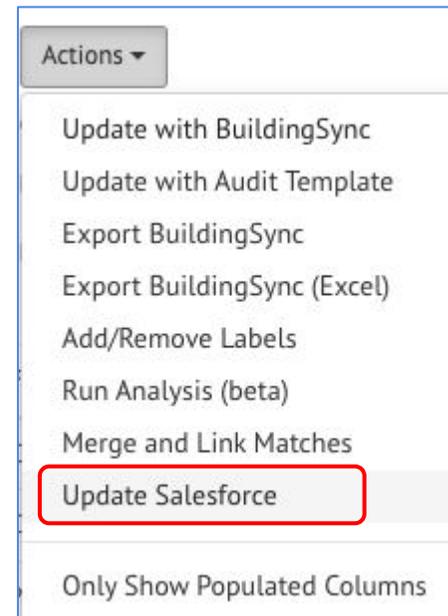
Done **Cancel**



Property List View: a group of properties can be selected and updated manually

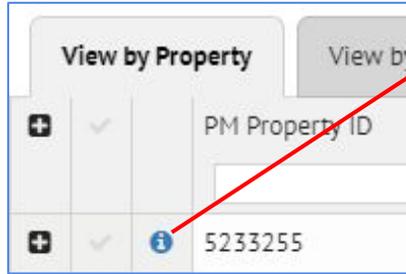


Property Detail: individual properties can be updated manually



Detail View - Property & Tax Lot

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



- Update with BuildingSync
- Update with Audit Template
- Export BuildingSync
- Export BuildingSync (Excel)
- Add/Remove Labels
- Run Analysis (beta)
- Unmerge Last
- Merge and Link Matches
- Only Show Populated Columns

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

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

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

← Properties

Property Detail

Property Detail
Meters
Sensors
Notes
Column List Profiles
Cross-Cycles
Analyses (beta)
Timeline

Property : 521 Elm Street ✎ Edit

Actions ▾

Cycle: 2018 Compliance Cycle ▾

Labels: >50000 SF Compliant

Detail Column List Profile: Property Detail Fields ▾

Field	Main	History of record shown in columns
PM Property ID	5233255	2 - example-data-ESPM-Alerts-UBID.xlsx
Property Name	Montessori Day School	Montessori Day School
Address Line 1	521 Elm Street	
Property Type	K-12 School	K-12 School
ENERGY STAR Score	55	
Gross Floor Area (ft ²)	200,000.00	200,000.00

Paired Tax Lots

TAX LOT ID	ADDRESS LINE 1	UNPAIR
33366555	(no address 1)	✕
33366125	(no address 1)	✕
33366148	(no address 1)	✕

Associated records can be unpaired

From the Property Detail view for a record, click the “Upload GreenButton Data” button

Properties **Property Detail**

Property Detail Meters Notes Column List Profiles Cross-Cycles

Property : 314 Einstein Place

Interval: Year

Filter Meters

Upload GreenButton Data

Step 1: In the Property Detail view for a given Property record, click the “Upload GreenButton Data” button to start the process, which opens the “Select Data Set” dialog box

Step 2: Select the appropriate Dataset name

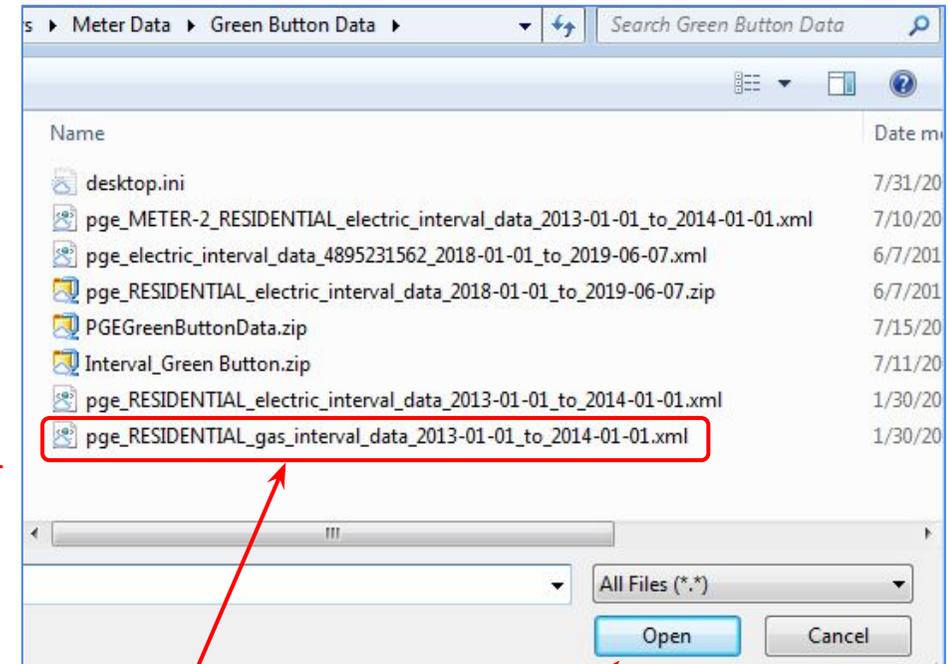
Select Data Set

Name ESPM Meter Data Testing

Upload File

Dismiss

Step 3: Click “Upload File” to open a Browser window to select the GreenButton XML file to upload.



Step 4: Select the appropriate file and click Open

Detail View - Meters: Import GreenButton Data

From the Property Detail view for a record, click the "Upload GreenButton Data" button

Confirm GreenButton File Contents

GreenButton UsagePoint	Type	Incoming
4864658	Natural Gas	365

Parsed Type	Parsed Unit
Natural Gas	therms

Confirm

Dismiss

Step 5: SEED displays a dialog box with a summary of the GreenButton data. Review this summary

- Click "Confirm" if you want to continue the upload.
- Click "Dismiss" if you want to cancel the upload.

Uploading File

Uploading pge_RESIDENTIAL_gas_interval_data_2013-01-01_to_2014-01-01.xml

0% Complete

Dismiss

Step 6: File is uploaded

Step 7: Results of upload are displayed

Upload Complete

GreenButton Usage...	Type	Incoming	Successfully Import...
4864658	Natural Gas	365	365

Complete and Refresh Page

Dismiss

Step 8: Click the Complete and Refresh Page button

Step 9: The data is added to the Meter view in Property Detail

Property Detail Meters Notes Settings

Meters

✓	Type	Alias	Source	Source Id
✓	Electric - Grid	Electric - Grid - GreenButt...	GreenButton	3103471

Step 10: Change the units if needed in Organizations/Settings

Settings Sharing

Meter energy display units (change one at a time)

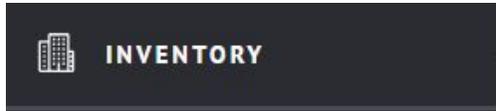
----Choose energy type----

----Change display unit----

Detail View - Meters (cont'd)

To see the imported meter data:

Go to the **Inventory** view, **View by Property** tab, select the appropriate **Cycle**, click the **Info** icon to get to the **Property Detail** view, click the **Meters** link



Click on the Meter Data icon to go directly to the Property Detail / Meters view

View by Property						View by Tax Lot		
+	✓					PM Property ID	Property Name	Gross Floor Area (ft ²)
						<input type="text"/>	<input type="text"/>	<input type="text"/>
						1311528	International House	482,215.00
						1311523	Lucky University	23,543.00
						5233255	Montessori Day School	200,000.00

Property : 20 Tenth Street

Interval:

[Upload GreenButton Data](#)

Note: Meters are labeled with the following format: "Type - Source - Source ID".

Meters

✓	Type	Alias	Source	Source Id	Scenario Id	Is Virtual	Scenario Name	Actions
✓	Cost	Cost - Portfolio Mana...	Portfolio Manager	19368261		false		Delete
✓	Electric - Grid	Electric - Grid - Portf...	Portfolio Manager	19368261		false		Delete

Readings

✓	Start Time	End Time	Electric - Grid - Portfolio Manager - 19368261 (kWh (thousand Watt-hours))	Cost - Portfolio Manager - 19368261 (US Dollars)
✓	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
✓	2018-02-02 00:00:00	2018-02-28 00:00:00	44,000.00	4,975.55
✓	2018-03-01 00:00:00	2018-03-31 00:00:00	42,880.00	4,915.00
✓	2018-01-01 00:00:00	2018-02-01 00:00:00	39,520.00	4,342.00

Detail View - Meters (cont'd)

The program will aggregate data based on the Interval selected.

- **Exact:** Shows the actual data as it was imported from the original source
- **Month:** Aggregates the data by month. If the data spans more than one month, the program cannot display the monthly aggregated data. The one exception is an end time of one month could be the beginning of the next month. For example, August 1 00:00:00 (but not 00:00:01) is an acceptable end time for an entry contained within the month of July.
- **Year:** Aggregates the data across each year of data. Similar to monthly aggregation, yearly aggregation accepts data with an end time of January 1 00:00:00 as part of the previous year.

Property : 20 Tenth Street

Interval: Exact

Upload GreenButton Data

Interval:

- Exact
- Exact
- Month
- Year

Note: Meters are labeled with the following format: "Type - Source - Source ID".

Meters

✓	Type	Alias	Source	Source Id	Scenario Id	Is Virtual	Scenario Name	Actions
✓	Cost	Cost - Portfolio Mana...	Portfolio Manager	19368261		false		Delete
✓	Electric - Grid	Electric - Grid - Portf...	Portfolio Manager	19368261		false		Delete

Readings

✓	Start Time	End Time	Electric - Grid - Portfolio Manager - 19368261 (kWh (thousand Watt-hours))	Cost - Portfolio Manager - 19368261 (US Dollars) ..
✓	2018-02-02 00:00:00	2018-02-28 00:00:00	44,000.00	4,975.55
✓	2018-03-01 00:00:00	2018-03-31 00:00:00	42,880.00	4,915.00
✓	2018-01-01 00:00:00	2018-02-01 00:00:00	39,520.00	4,342.00

Detail View - Meters (cont'd)

In this case, the monthly data spans more than one month, i.e., 1-11-2014 to 2-10-2015 is defined as one month.

This is shown by setting Interval == Exact

Interval:

Start Time ▲	End Time	Electric - Grid - PM - 46643762 (kWh (thousand Watt-hours))	Cost - PM - 46643762 (US Dollars)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2015-01-11 00:00:00	2015-02-10 00:00:00	116,431.70	8,732.38
2015-02-10 00:00:00	2015-03-12 00:00:00	122,951.50	9,221.36
2015-03-12 00:00:00	2015-04-15 00:00:00	122,491.00	9,186.83

Therefore, choosing Interval=Month results in no data being displayed

Interval:

No Data

Exception:

If the data spans more than one month, the program cannot display the monthly aggregated data. The one exception is an end time of one month could be the beginning of the next month. For example, August 1 00:00:00 (but not 00:00:01 is an acceptable end time for an entry contained within the month of July.

When Interval == Year, the program aggregates the data for each year

Interval:

Year	Electric - Grid - PM - 46643762 (kWh (thousand Watt-hours))	Cost - PM - 46643762 (US Dollars)
<input type="text"/>	<input type="text"/>	<input type="text"/>
2014	1,449,570.80	108,717.82
2015	1,427,786.70	107,084.02
2016	1,397,457.80	104,809.37
2017	381,000.00	29,390.00

Detail View - Meters (cont'd)

In this case, the monthly data is fully contained within one month

Interval = Exact
All the data is displayed

Interval:

Start Time	End Time	Natural Gas - PM - 46643764 (kBtu (thousand Btu))	Cost - PM - 46643764 (US Dollars)
2014-01-01 00:00:00	2014-01-31 00:00:00	406,140.00	3,533.42
2015-01-01 00:00:00	2015-01-31 00:00:00	383,580.00	3,337.15
2015-02-01 00:00:00	2015-02-28 00:00:00	541,520.00	4,711.22
2015-03-01 00:00:00	2015-03-31 00:00:00	372,300.00	3,239.01

Interval = Month
Data is aggregated by month

Interval:

Month	Natural Gas - PM - 46643764 (kBtu (thousand Btu))	Cost - PM - 46643764 (US Dollars)
January 2014	406,140.00	3,533.42
February 2014	564,090.00	4,907.58
March 2014	394,860.00	3,435.28
April 2014	180,510.00	1,570.44
May 2014	5,640.00	49.07

Exception:
If the data spans more than one month, the program cannot display the monthly aggregated data. The one exception is an end time of one month could be the beginning of the next month. For example, August 1 00:00:00 (but not 00:00:01) is an acceptable end time for an entry contained within the month of July.

Interval = Year
Data is aggregated by year

Interval:

Year	Natural Gas - PM - 46643764 (kBtu (thousand Btu))	Cost - PM - 46643764 (US Dollars)
2014	2,309,610.00	20,093.62
2015	2,031,110.00	17,670.66
2016	1,965,360.00	17,098.63
2017	1,090,000.00	8,910.00

Detail View - Notes

Properties > Property Detail Notes

Property Detail Meters Notes Column List Profiles Cross-Cycles Anal

Property : (address_line_1 is blank) ⓘ

New Note

Created	Type	Name	Text
02/13/2022 06:37:28 PM	Note	Manually Created	Need to contact owner that the account is not complete

Add New Note

Note

Contact is Joyce Wise: 511-293-3929

Property and Tax Lot details each have their own notes

Cancel Add Note

Properties > Property Detail Notes

Property Detail Meters Notes Settings

Property : 12 Ninth Street

New Note

Created	Type	Name	Text
08/05/2019 02:54:29 PM	Note	Manually Created	Contact is Joyce Wise: 511-293-3929
08/05/2019 02:52:09 PM	Note	Manually Created	Need to get back to owner that the account is not complete

Icon indicates Notes (Inventory List)

✓						PM Property ID
✓	🗺️	💬 ₃	⚡	ℹ️	🚫	22178849
✓	🗺️	💬 ₁	⚡	ℹ️	🟦	22178844

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 - Column List Profiles

Click Column List Profiles 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 type="checkbox"/>		Column Name
<input type="checkbox"/>		city
<input checked="" type="checkbox"/>	↓	City (Property)
<input checked="" type="checkbox"/>	↓	City (Tax Lot) tax lot
<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**

Property Detail Meters Sensors Notes **Column List Profiles** Cross-Cycles Analyses (beta) Timeline

Column Order/Visibility Detail Column List Profile: Detailed Profile View

There are 138 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"/>	PM Property ID
<input checked="" type="checkbox"/>	Property Name
<input checked="" type="checkbox"/>	Address Line 1
<input checked="" type="checkbox"/>	City
<input checked="" type="checkbox"/>	Gross Floor Area (ft ²)

Detail View - Column List Profiles (cont'd)

In all the Detail View (for both Property and Tax Lot views) the “Column List Profiles” 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

Property Detail

Property Detail Meters Sensors Notes **Column List Profiles** Cross-Cycles Analyses (beta) Timeline

Column Order/Visibility Detail Column List Profile: Detailed Profile View

Save Rename Delete New

There are 138 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.

Column Name	Visible
PM Property ID	<input checked="" type="checkbox"/>
Property Name	<input checked="" type="checkbox"/>
Address Line 1	<input checked="" type="checkbox"/>
City	<input checked="" type="checkbox"/>
Gross Floor Area (ft ²)	<input checked="" type="checkbox"/>

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**

Detail View - Edit the Main Record

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

← Properties **Property Detail**

Property Detail Meters Sensors Notes Column List Profiles Cross-Cycles Analyses (beta) Timeline

Property : 20 Tenth Street

Save Changes Cancel

Actions ▾

Cycle: 2018 Compliance Cycle ▾

Labels: >50000 SF Compliant Energy Star Score > 25

Detail Column List Profile: Property Detail Fields ▾

Field	Main ↗	2 - example-data-ESPM-Alerts-UBID.xlsx ⬇
PM Property ID	<input type="text" value="1311525"/>	1311525
Property Name	<input type="text" value="Biology Hall"/>	Biology Hall
Address Line 1	<input type="text" value="20 Tenth Street"/>	
Property Type	<input type="text" value="Laboratory"/>	Laboratory
ENERGY STAR Score	<input type="text" value="56"/>	56
Gross Floor Area (ft ²)	<input type="text" value="53000"/>	421,351.00

Edit

Step 1: Click **Edit** to change the information in the **Main** column.

This will put you in “Edit” mode

Step 2: To Edit Data:

Click on the data in the **Main** column and edit it directly

Step 3: Click the **Save Changes** button in the upper right of the view when you have finished editing the **Main** column

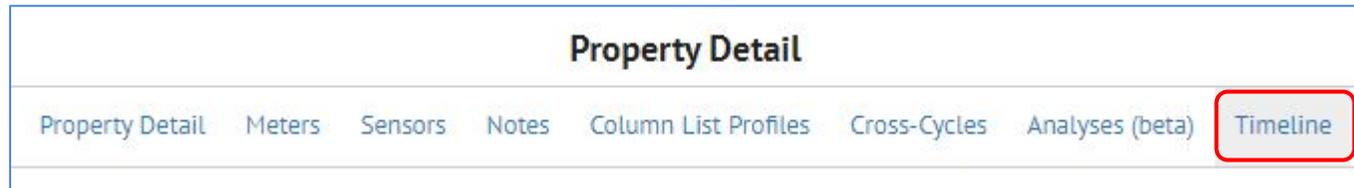
Field	Main ↗
PM Property ID	1311525
Property Name	Biology Hall
Address Line 1	20 Tenth Street
Property Type	Laboratory
ENERGY STAR Score	56
Gross Floor Area (ft ²)	530,000.00

Step 4: The Main column is now updated with the changes



Detail View: Timeline

A new feature has been added called Timeline, to show important “events” that happen on a property



There is a row in the Timeline for every event

Events added to the Timeline are

- New Notes (added manually)
- New Analyses
- New Audit Template or BuildingSync file upload

Clicking the Timeline link for a property will show all the actions across cycles

Property Detail

Property Detail Meters Sensors Notes Column List Profiles Cross-Cycles Analyses (beta) **Timeline**

Property : Medstar POB North Tower

Event Selection

- Select All
- Notes
- Analyses
- AT Uploads

← Filter the events as needed

Expand All Sort By: Newest to Oldest Cycles

Year	Count	Summary
2023	Notes: 1	
> 2023-03-29		Alex Chapin Note
2022	Notes: 1	
> 2023-03-29		Alex Chapin Note
2021	Analyses: 2 Audit Template Files: 1	
> 2023-03-29		Alex Chapin Analysis BETTER
> 2023-03-29		Alex Chapin Analysis BETTER
> 2023-03-29		Audit Template File

Detail View: Timeline (cont'd)

Clicking the Timeline link for a property will show all the actions across cycles

Click this button to expand all the events at once

Details for Note events

Expand an event to see the details

Results for a BETTER analysis

Sort options

Expand All Sort By: Newest to Oldest

2023 Notes: 1

2023-03-29 Alex Chapin Note

Updated	Text
2022-08-31	

2022 Notes: 1

2023-03-29 Alex Chapin Note

2021 Analyses: 2 Audit Template Files: 1

2023-03-29 Alex Chapin Analysis BETTER

Name	Service	Created	Run Duration	Status
Better second try	BETTER	2023-01-12		Failed

Better second try Run #7137 Failed

Meter Selection: All

0 Full Analysis

2023-03-29 Alex Chapin Analysis BETTER

2023-03-29 Audit Template File

Audit Template event

Expanding the Audit Template upload show the scenarios from the file

2023-03-29		Audit Template File			
Scenarios	Electricity savings (kBtu)	Peak electricity reduction (kW)	Natural gas savings (kBtu)	Status of Measures	
> Audit Template Energy Meter Readings - Natural gas	N/A	N/A	N/A		
> Audit Template Energy Meter Readings - Electricity	N/A	N/A	N/A		
> Install timer on exhaust fans	14,704	0	1,874	1 Proposed	
> Hydronic Pump VFD Upgrade	177,384	3	0	3 Proposed	
> Low-flow water fixtures	0	0	53	1 Proposed	
> Air Sealing	0	0	15,066	2 Proposed	
> Garage fan CO sensor	13,615	0	3,410	1 Proposed	
> Optimize heating and cooling	0	0	33,214	2 Proposed	

Detail View: Timeline (cont'd)

Audit Template event

Expand the Scenarios to see the individual measures

2021											
Analyses: 2 Audit Template Files: 1											
2023-03-29 Alex Chapin Analysis BETTER											
2023-03-29 Alex Chapin Analysis BETTER											
2023-03-29 Audit Template File											
Scenarios	Electricity savings (kBtu)		Peak electricity reduction (kW)		Natural gas savings (kBtu)		Status of Measures				
> Audit Template Energy Meter Readings - Natural gas	⚡	N/A	⚡	N/A	🔥	N/A					
> Audit Template Energy Meter Readings - Electricity	⚡	N/A	⚡	N/A	🔥	N/A					
▼ Install timer on exhaust fans	⚡	14,704	⚡	0	🔥	1,874	1 Proposed				
MEASURES											
Category	Name	Recommend...	Status	Category Aff...	Cost Installat...	Cost Material...	Cost Residua...	Cost Total Fir...	Cost Capital ...	Description ...	Useful Life
Building Aut...	Add or upgra...	true	Proposed	Fan				400			15
▼ Hydronic Pump VFD Upgrade	⚡		177,384	⚡	3	🔥	0	3 Proposed			
MEASURES											
Category	Name	Recommend...	Status	Category Aff...	Cost Installat...	Cost Material...	Cost Residua...	Cost Total Fir...	Cost Capital ...	Description ...	Useful Life
Electric Moto...	Add VSD mot...	true	Proposed	Motor				20746			15
Electric Moto...	Add VSD mot...	true	Proposed	Motor				37992			15
Electric Moto...	Add VSD mot...	true	Proposed	Motor				17246			15

In the Property Detail View:
Audit Template and BuildingSync
files can be imported

Import either Audit Template files
or BuildingSync files

The Scenarios and Measures
from the imported file will be
displayed at the bottom of the
Property Detail page

Properties

Property Detail

Property : BuildingType-70339502439620

Actions

- Update with BuildingSync
- Update with Audit Template
- Export BuildingSync
- Export BuildingSync (Excel)
- Add/Remove Labels
- Run Analysis (beta)
- Unmerge Last
- Merge and Link Matches
- Only Show Populated Columns

Building Files (Main State Only)

FILE TYPE	FILE NAME	CREATED
BuildingSync	BPS_Sample_AT_11911.xml	2022-10-18 8:01 AM

Scenarios & Measures

Expand All

2021

Audit Date: Upload Date: 2022-10-18

Detail View: Audit Template Files (cont'd)

Property Detail View: it is possible to delete scenarios from imported Audit Template files

Building Files (Main State Only)

FILE TYPE	FILE NAME	CREATED
BuildingSync	BPS_Sample_AT_11911.xml	2022-10-18 8:01 AM

Scenarios & Measures
Expand All

2021

Audit Date: Upload Date: 2022-10-18

ACTIONS	SCENARIOS	ELECTRICITY SAVINGS (KBTU)	PEAK ELECTRICITY REDUCTION (KW)	NATURAL GAS SAVINGS (KBTU)	STATUS OF MEASURES
	> Install timer on exhaust fans	14,704	0	1,874	1 Proposed
	> Hydronic Pump VFD Upgrade	177,384	3	0	3 Proposed
	> Low-flow water fixtures	0	0	53	1 Proposed
	> Air Sealing	0	0	15,066	2 Proposed
	> Garage fan CO sensor	13,615	0	3,410	1 Proposed
	> Optimize heating and cooling	0	0	33,214	2 Proposed

Expand the Audit record to see the Scenarios

Expand the Scenarios to see the measures

Delete unneeded scenarios if desired

Export Data -- 2 Options

There are 2 options for exporting data. Both options open the Export data dialog box

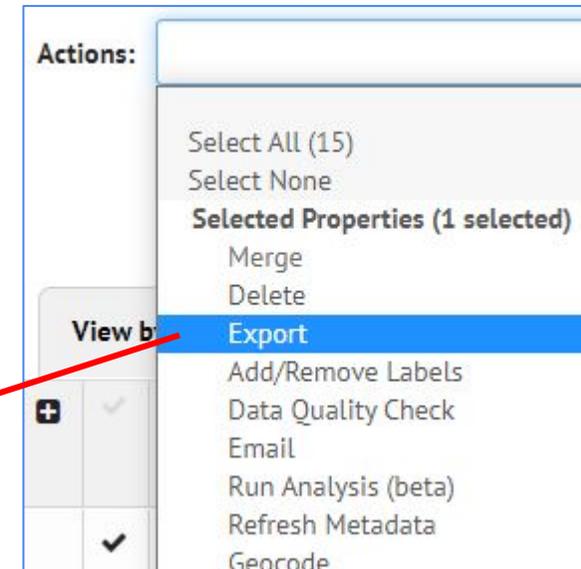
Option 1: Export options from the "Hamburger" menu

- Exports all the data



Option 2: Export Selected from the Actions pulldown

- Exports the data that is checked in the Inventory list



A screenshot of the 'Export your Properties and Tax Lots' dialog box. The dialog box has a title bar and a main content area. The main content area contains the following fields and options:

- Export Name:** A text input field containing '2022 Records'.
- Include Notes:** A checkbox that is checked.
- CSV - Include Label Header:** A checkbox that is unchecked.
- GeoJSON - Include Meter Readings (only recommended if exporting a few buildings):** A checkbox that is unchecked.

At the bottom of the dialog box, there are three buttons: 'Export CSV', 'Export BuildingSync in Excel format', and 'Export GeoJSON'.

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

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 Floor Area
+	✓	1311525	24651455		20 Tenth Street	Biology Hall	Laboratory	421351
+	✓	4828379	11160509	2655 Welstone Ave NE	2660 Welstone Ave NE	Hilltop Offices	Office	55121
+	✓	5233255	33366125; 33366148; ...	521 Elm Street; 525 EL...	521 Elm Street	Montessori Day School	K-12 School	200000
	✓	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 options 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). Three rows are visible, each with a checkmark in the first column. Red arrows point from the 'Export Selected' option to the first three rows of the table.

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

ORGANIZATION
BPS Test
Sub-Organizations

ORGANIZATION NAME
BPS Test

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

BPS Test											
Column Settings	Column Mappings	Cycles	Data Quality	Derived Columns	Email Templates	Labels	Members	Program Setup	Settings	Sharing	Sub-Organizations

Organization Name

- The links from this view are
 - **Column Settings:** Change the names of the fields in the existing data
 - **Column Mappings:** Manage the mappings for new fields being imported
 - **Cycles:** The Admin screen for managing Cycles
 - **Data Quality:** The Admin screen for managing Data Quality settings
 - **Derived Columns:** Allows definition of a new column derived from existing columns
 - **Email Templates:** Allows setup of an email template
 - **Labels:** The Admin screen for managing Labels
 - **Members:** A list of all members of this organization
 - **Program Setup:** Settings for the Insight Feature
 - **Settings:** The Admin screen for organization settings
 - **Sharing:** The Admin screen for managing how data is shared
 - **Sub-Organizations:** A list of all sub-organizations related to this organization

Column Settings

This screen shows the settings for the columns (fields) in the database. Changes to the settings 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.

Column Settings | Column Mappings | Cycles | Data Quality | Derived Columns | Email Templates | Labels | Members | Program Setup | Settings | Sharing | Sub-Organizations

Column Settings

The top of the page shows the Help information

Save Changes

Create Column

Collapse Help

← This Help text can be collapsed if desired

Modifying Column Settings

From the table below, you may modify the columns in the following ways:

- Display Name**
 - Change the display name (that appears throughout the program) of a column. This is user-defined and can be any value (?)
- Column Name**
 - Specifies the underlying field name represented by the Display Name. These field names are not user defined, but are generated from imported user files as well as program-defined fields.
 - Note, geocoding requires at least 1 column is used and populated to construct full addresses.
- Column Description**
 - Provides a description of the column to assist in remembering the meaning of the column. This defaults to the display name if available, otherwise the column name is utilized.
- Geocoding Order**
 - Check the appropriate fields, as well as their order for the program to concatenate a full address, which SEED will use to generate latitude and longitude values for each record
 - Note, geocoding requires at least 1 column is used and populated to construct full addresses.
- Rename**
 - Rename allows users to change the name of the underlying field shown in Column Name / Field Name. Renaming a field means that field will be changed in all the data for the organization.
- Data Type**
 - For “extra data” fields, this allows the user to set the type, such as Text, Number, Date, etc.
- Merge Protection**
 - 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.
- Recognize Empty**
 - Checking this box for a field will affect how empty or blank values are treated during merges. Specifically, empty values will be able to replace non-empty values per the “Merge Protection” setting.
- Match Criteria**
 - Checking this box for a field will allow it to be used as a matching field.
 - **Warning: If matching criteria changes are proposed, a preview will be loaded. The load times for this preview depend on how many records belong to this organization and how many of those records would be merged together given the new matching criteria.**
- Delete**
 - Permanently delete extra_data columns and all associated data

Column Settings (cont'd)

Internal database field name

The checked fields are used for Geocoding

The checked fields will not be changed during record merging

The checked fields determine the record matching

View by Property									
DISPLAY NAME↑↓	COLUMN NAME↑↓	COLUMN DESCRIPTION	GEOCODING ORDER↑↓	RENAME	DATA TYPE	MERGE PROTECTION	RECOGNIZE EMPTY ↑↓	MATCH CRITERIA ↑↓	DELETE
Search display	Search column name								
PM Property	pm_property_id	PM Property ID	<input type="checkbox"/> ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Custom ID 1	custom_id_1	Custom ID 1	<input type="checkbox"/> ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
PM Parent Pr	pm_parent_property_id	PM Parent Property ID	<input type="checkbox"/> ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Jurisdiction P	jurisdiction_property_id	Jurisdiction Property ID	<input type="checkbox"/> ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
UBID	ubid	UBID	<input type="checkbox"/> ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Audit Templa	audit_template_building_id	Audit Template Building ID	<input type="checkbox"/> ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Address Line	address_line_1	Address Line 1	<input checked="" type="checkbox"/> 1 ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Address Line	address_line_2	Address Line 2	<input checked="" type="checkbox"/> 2 ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
City	city	City	<input checked="" type="checkbox"/> 3 ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
State	state	State	<input checked="" type="checkbox"/> 4 ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Postal Code	postal_code	Postal Code	<input checked="" type="checkbox"/> 5 ▼	Rename	Text ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Column Mappings

Column Mappings are used to set the fields when importing a file. This view allows the user to define several column mappings depending on the file being imported.

Click on the **Column Mappings** link

Column Mappings **Help** screen at the top of the page

Rename

Download to CSV

Column Settings | **Column Mappings** | Cycles | Data Quality | Derived Columns | Email Templates | Labels | Members | Program Setup | Settings | Sharing | Sub-Organizations

Column Mapping Profile: Portfolio Manager Defaults

Save | Rename | Delete | New

Column mapping profiles can help you standardize and simplify your file import mapping process. Create mappings to specific Data File header values - mapping SEED headers, Inventory Types, and if applicable, Measurement Units.

SEED header values can be manually typed. As you type, a list of suggestions will appear if the value is similar to a column that SEED already recognizes.

Also, you can copy Data File header values directly over to SEED headers via the button below.

Alternatively, you can get SEED header suggestions based on existing column names using the other button below.

You can create mapping rows for a profile by adding them individually or by copying Data File header values in a comma-delimited list by using the input box on the right.

When using a profile for an incoming file, Data File header values must match exactly in order for the mappings to be prepopulated.

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

<File Column 1>,<File Column 2>,<File Column 3>,...

It is possible to define the field names and order by typing field names in this box

Copy into Data File Headers

Column Mappings (cont'd)

This screen allows users to define different Column Mapping Profiles for different files being imported

Copy Data File Headers directly to SEED Headers

Populate SEED Headers with best known matches

Click the "Delete All Mappings" button to delete the existing mappings

SEED			2020 Portfolio Manager Fields	
Set all fields to: <input type="text"/>				
INVENTORY TYPE	SEED HEADER ↓	MEASUREMENT UNITS	DATA FILE HEADER ↑↓	Delete All Mappings
<input type="text" value="Property"/>	PM Property ID		Property ID	<input type="button" value="X"/>
<input type="text" value="Property"/>	Parent Property ID		Parent Property ID	<input type="button" value="X"/>
<input type="text" value="Property"/>	Property Name		Property Name	<input type="button" value="X"/>
<input type="text" value="Property"/>	Address 1		Address 1	<input type="button" value="X"/>
<input type="text" value="Property"/>	City		City	<input type="button" value="X"/>
<input type="text" value="Tax Lot"/>	Rust Parcel ID		Rust Parcel ID	<input type="button" value="X"/>
<input type="text" value="Property"/>	Property Type		Property Type	<input type="button" value="X"/>
<input type="text" value="Property"/>	Gross Floor Area	<input type="text" value="square feet"/>	Gross Floor Area	<input type="button" value="X"/>

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

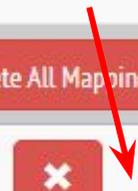
Field name in the file being imported

Column Mappings (cont'd)

A Column Mapping Profile can have multiple fields defined to be mapped to the same field in SEED. This can be useful when importing different files with different fields representing the same data

Click the "Delete All Mappings" button to delete the existing mappings

Delete All Mappings



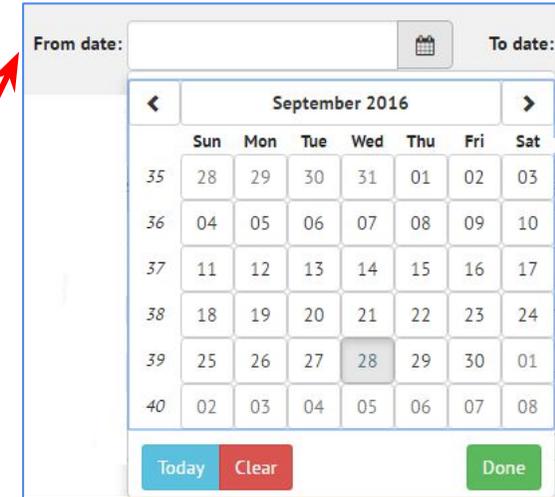
SEED		Portfolio Manager Defaults		
Set all fields to: <input type="text" value="Property"/>		Mapped Fields		
INVENTORY TYPE	SEED HEADER ↓	MEASUREMENT UNITS	DATA FILE HEADER ↑	
<input type="text" value="Property"/>	Address Line 1	These three different field names in an input file are all mapped to the same field, Address Line 1 , in SEED	Address 1	<input type="button" value="X"/>
<input type="text" value="Property"/>	Address Line 1		address1	<input type="button" value="X"/>
<input type="text" value="Property"/>	Address Line 1		Street Address	<input type="button" value="X"/>
<input type="text" value="Property"/>	Address Line 2	These three different field names in an input file are all mapped to the same field, Address Line 2 , in SEED	Address 2	<input type="button" value="X"/>
<input type="text" value="Property"/>	Address Line 2		address2	<input type="button" value="X"/>
<input type="text" value="Property"/>	Address Line 2		Street Address 2	<input type="button" value="X"/>
<input type="text" value="Property"/>	Building Count	SEED	How Many Buildings?	<input type="button" value="X"/>
<input type="text" value="Property"/>	City	These three different field names in an input file are all mapped to the same field, City , in SEED	city	<input type="button" value="X"/>
<input type="text" value="Property"/>	City		City	<input type="button" value="X"/>
<input type="text" value="Property"/>	City		City/Municipality	<input type="button" value="X"/>

Manage Cycles

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

Click on the **Cycles** link

2 - Set the **From date and To date**



Column Settings Column Mappings **Cycles** Data Quality Derived Columns Email Templates Labels Members Program Setup Settings Sharing Sub-Organizations

Create new cycle

Cycle Name

From date:

To date:

Create Cycle

1 - Type a name to create a new cycle

3 - Click Create Cycle to save it

Existing Cycles

NAME	FROM DATE	TO DATE	
2019 Compliance Year	01-01-2019	12-31-2019	Edit Delete
2020 Compliance Year	01-01-2020	12-31-2020	Edit Delete
2021 Compliance Year	01-01-2021	12-31-2021	Edit Delete

Data Quality: Overview

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

Organizations

BPS Test

Column Settings Column Mappings Cycles **Data Quality** Derived Columns Email Templates Labels Members Program Setup Settings Sharing Sub-Organizations

Data Quality

Reset All Rules

Save Changes

Click on the **Data Quality** link

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.

Reset All Rules: delete all rules and reinitialize the default set of rules.

Create a new rule

Separate rules are defined for Property and Tax Lot fields

Minimums & Maximums are set for Range checks

Labels can be added to Data Quality rules

Data Quality rules can be deleted

View by Property 6	View by Tax Lot 2	CONDITION CHECK	FIELD	DATA TYPE	MINIMUM	MAXIMUM	UNITS	SEVERITY LEVEL	LABEL	DELETE
<input checked="" type="checkbox"/>		Not Null	ENERGY STAR Score	Number	(no minir	(no maxir		Error	DQ: Energy Star Missing	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Range	ENERGY STAR Score	Number	10	100		Error	DQ: Energy Star Score Hi or Low	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Not Null	Gross Area (SF)	Number	(no minir	(no maxir		Error	DQ: Gross Floor Area Missing	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Range	Gross Floor Area (ft ²)	Number	100	7000000	sqft	Error	DQ: Gross Floor Area Hi or Low	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Range	Site EUI (kBtu/ft ² /year)	EUI	10	1000	kBtu	Error	DQ: Site EUI Hi or Low	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>		Not Null	Site EUI (kBtu/ft ² /year)	EUI	(no minir	(no maxir		Error	DQ: Site EUI Missing	<input checked="" type="checkbox"/>

Data Quality: Create a new rule

Create a new rule

View by Property 8 | View by Tax Lot 2

CONDITION CHECK	FIELD	DATA TYPE
<input checked="" type="checkbox"/> Required		Number
<input type="checkbox"/> Not Null		
<input checked="" type="checkbox"/> Range		
<input checked="" type="checkbox"/> Must Contain		
<input type="checkbox"/> Must Not Contain		

Mapped Fields

- Address 1
- Building ID
- City
- ENERGY STAR Score**
- Gross Floor Area (ft²)
- Owner

A rule defines the criteria for the 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.

- Required
- Not Null
- Range
- Must Contain
- Must Not Contain

Select the desired field from the pulldown list

Set the Data Type

Enter Min/Max or Text to check if applicable

Units If applicable

Set to Error or Warning

Click + to add a label

Click the red X button to delete the rule

View by Property 7 | View by Tax Lot 2

CONDITION CHECK	FIELD	DATA TYPE	MINIMUM	MAXIMUM	UNITS	SEVERITY LEVEL	LABEL	DELETE
<input checked="" type="checkbox"/> Required	Address 1	Text				Error		<input type="button" value="+"/> <input type="button" value="X"/>

Address Missing

View by Property 7 | View by Tax Lot 2

CONDITION CHECK	FIELD	DATA TYPE	MINIMUM	MAXIMUM	UNITS	SEVERITY LEVEL	LABEL	DELETE
<input checked="" type="checkbox"/> Required	Address 1	Text				Error	Address Missing	<input type="button" value="X"/>
<input checked="" type="checkbox"/> Range	ENERGY STAR Score	Number	10	100		Error	DQ: Low / No ENERGY STAR Score	<input type="button" value="X"/>

Click the Save Changes button

Derived Columns

Organizations

Click on the **Derived Columns** tab

BPS Test

Column Settings Column Mappings Cycles Data Quality **Derived Columns** Email Templates Labels Members Program Setup Settings Sharing Sub-Organizations

Derived Columns

Derived columns can be defined for Properties or Tax Lots

Create Derived Column

View by Property

View by Tax Lot

All the Derived Columns are shown in this list

Click Create Derived Column to define a new one

Edit the existing Derived Columns

DERIVED COLUMN NAME↓↑

EXPRESSION

ACTIONS

Diff From Target

\$WeatherNormEUI-\$TargetEUI



Delete existing Derived Columns

Give the Derived Column a name

Define names for each parameter

The Type will default to the tab set when the Derived Column was created

Select the existing fields to add to the calculated expression

Save the Derived Column

Create the expression, add \$ to each Parameter Name

Derived Columns

Derived column name: Diff From Target

Type: Property

Parameter name: WeatherNormEUI, Source column: Weather Normalized Site EUI

Parameter name: TargetEUI, Source column: EUI Target

Expression: \$WeatherNormEUI-\$TargetEUI

Buttons: + Add parameter, Save

- eui
- Site EUI**
- Site EUI Modeled
- Site EUI Weather Normalized
- Source EUI
- Source EUI Modeled
- Source EUI Weather Normalized
- EUI Target
- EUI Target Year
- Weather Normalized Site EUI

Email Templates

Organizations

BPS Test

Click on the **Email Templates** tab

Column Settings Column Mappings Cycles Data Quality Derived Columns **Email Templates** Labels Members Program Setup Settings Sharing Sub-Organizations

Email Templates

Available Templates: ENERGY STAR Score Issue

Custom emails can be sent to Building Owners using the templates defined below. The email will be sent to the SEED record's Owner Email address and is currently not configurable. The email 'from' address is the same as the server email address which is also used to email users their account information.

The email supports brace templating to pull in data from the SEED property record. For example, the snippet below will replace the latitude and longitude from the SEED record. Other fields can be added, but make sure to use the SEED field name not the display name.

"Your building's latitude and longitude is {{latitude}}, {{longitude}}!"

Subject

Create a subject line for the email

Benchmarking Compliance: Please check the ENERGY STAR Score for your building

Content

Rich text editor toolbar with icons for list, bold, italic, and link.

Create content for the email using fields from the data shown in the Inventory List, such as owner name.

In the Inventory List, select the properties to send this email to, and the appropriate email template can be selected

Actions: [Dropdown menu]

- Select All (9)
- Select None
- Selected Properties (1 selected)**
- Merge
- Delete
- Export
- Add/Remove Labels
- Data Quality Check
- Email**
- Run Analysis (beta)

Select the Email Template and the email(s) will be sent

Select an Email Template

ENERGY STAR Score Issue	Select
Site EUI Issue	Select

Click on the **Labels** link

Create new label

Label Name

gray

Show in List

Create label

4 - Click Create Label

To Create a new label:
1 - type the name of the label

2 - set the color

3 - Check whether to show it in the Inventory List view

Existing Labels

NAME

< 10,000 SF	Show in List	edit	X
> 10,000 < 50,000 SF	Show in List	edit	X
> 50,000 SF	Show in List	edit	X
Call	Show in List	edit	X
Change of Ownership	Show in List	edit	X
College / University	Show in List	edit	X
Compliant	Show in List	edit	X
DQ: Energy Star Missing	Show in List	edit	X
DQ: Energy Star Score Hi or Low	Show in List	edit	X
DQ: Gross Floor Area Hi or Low	Show in List	edit	X

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

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

You can invite new members to your organization

< Organizations

LBNL 302

Click on the **Members** link

Column Settings Column Mappings Cycles Data Quality Derived Columns Email Templates Labels **Members** Program Setup Settings Sharing Sub-Organizations

Members

Reset all passwords – Invite a new member

MEMBER NAME	MEMBER EMAIL	MEMBER ROLE
member name	member email	member role
Robin LBNL 302	rdmitchell+302@lbl.gov	

seeddemostaging.lbl.gov says
Really reset all passwords? This will sign you out of SEED.

Invite a New Member

First Name:

Last Name:

Email Address:

Role:

- Owner
- Member**
- 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

Program Setup

← Organizations BPS Test

Column Settings Column Mappings Cycles Data Quality Derived Columns Email Templates Labels Members **Program Setup** Settings Sharing Sub-Organizations

Program Setup Delete Save Changes

PROGRAM

BPS Compliance Both Metrics ✕

BPS Compliance - GHG Only ✕

BPS Compliance - Energy only ✕

+ New Program

GENERAL SETTINGS

Configure your program metric to enable visualizations on the [program overview](#) page.

PROGRAM DEFINITION

Name

CYCLES TO INCLUDE IN COMPLIANCE PERIOD

FILTER GROUP

VISUALIZATION SETTINGS

Select at least one field which will serve as the x-axis for visualizations on the [property insights](#) page. Multiple fields can be selected.

X-AXIS FIELD OPTIONS

Postal Code ✕

Gross Floor Area (ft²) ✕

Property Type ✕

Year Built ✕

METRIC TYPE SETTINGS

The overall metric can be made up of an energy metric, an emission metric, or both. At least one type of metric is required and if two are defined, then both metrics must be met for compliance.

ENERGY METRIC	EMISSION METRIC
Actual Field <input type="text" value="Site EUI (kBtu/ft<sup>2</sup>/y)"/>	Actual Field <input type="text" value="Total GHG Emissio"/>
Target Field <input type="text" value="EUI Target (kBtu/ft"/>	Target Field <input type="text" value="GHG Target Emissi"/>
Type <input type="text" value="Target >= Actual for Comp"/>	Type <input type="text" value="Target >= Actual for Comp"/>

The Program Setup tab is used to define the parameters for the Insights feature, accessed from the Insights Navigation tab.



There is separate documentation to describe this functionality

Settings: Options

BPS Test **Click on the Settings link**

- Column Settings
- Column Mappings
- Cycles
- Data Quality
- Derived Columns
- Email Templates
- Labels
- Members
- Program Setup
- Settings**
- Sharing
- Sub-Organizations

Click on the Options tab

Settings

Options

API Key

Default Display Fields

Email

Maintenance

Salesforce

Units

Organization Name

BPS Test **You can change the organization name**

Enable Geocoding



Check this to enable automatic geocoding

Enable ComStock Functionality



Check this to enable ComStock Functionality

Save Changes

Settings: API Key

BPS Test [Click on the Settings link](#)

- Column Settings
- Column Mappings
- Cycles
- Data Quality
- Derived Columns
- Email Templates
- Labels
- Members
- Program Setup
- Settings**
- Sharing
- Sub-Organizations

Settings

[Click on the API Key tab](#)

- Options
- API Key**
- Default Display Fields
- Email
- Maintenance
- Salesforce
- Units

MapQuest API Key ← [Key for geolocating with MapQuest](#)

BETTER Analysis API Key ← [Key for running a BETTER analysis](#)

Please refer to the [BETTER documentation](#) to learn how to get an API key. Note, do not prefix the token with "Token ", only include the token itself. BETTER host is configured to be <https://better.lbl.gov>.

Verify Token

Audit Template Organization Token ← [Token for connecting to Audit Template](#)

Please refer to the [Audit Template documentation](#) to learn how to get an API key. Note, do not prefix the token with "Token ", only include the token itself.

Audit Template Email ← [Email for the Audit Template Email](#)

Use the email associated with your account from [Building Energy Score website](#).

Audit Template Password ← [Password for Audit Template](#)

Use the password associated with your account from [Building Energy Score website](#).

Settings: Default Display Fields

BPS Test [Click on the Settings link](#)

- Column Settings
- Column Mappings
- Cycles
- Data Quality
- Derived Columns
- Email Templates
- Labels
- Members
- Program Setup
- Settings**
- Sharing
- Sub-Organizations

Settings

[Click on the Default Display Fields tab](#)

Options

API Key

Default Display Fields

Email

Maintenance

Salesforce

Units

Property Display Field

Determines which column field is used when displaying and identifying a property. Defaults to "Address Line 1".

Property Name

Taxlot Display Field

Determines which column field is used when displaying and identifying a taxlot. Defaults to "Address Line 1".

Address Line 1

The default Property Display Field was changed from Address Line 1 to Property Name

The Property Name now displays in the Property Detail view

[← Properties](#)

Property Detail

Property Detail Meters Notes Column List Profiles

Property : 37-I1 East County Regional Center

Save Changes

BPS Test [Click on the Settings link](#)[Column Settings](#) [Column Mappings](#) [Cycles](#) [Data Quality](#) [Derived Columns](#) [Email Templates](#) [Labels](#) [Members](#) [Program Setup](#) **Settings** [Sharing](#) [Sub-Organizations](#)

Settings

[Click on the Email tab](#)[Options](#)[API Key](#)[Default Display Fields](#)**Email**[Maintenance](#)[Salesforce](#)[Units](#)

New User Email

Customizes the email sent when a new user is invited to SEED. The body can accept placeholders `{{first_name}}` and `{{sign_up_link}}`, including the braces.

From Email **Subject** **Body**
Signature

The Email feature allows creating a template email that can be sent to users when they are added to a SEED organization.

[Save Changes](#)

BPS Test [Click on the Settings link](#)[Column Settings](#) [Column Mappings](#) [Cycles](#) [Data Quality](#) [Derived Columns](#) [Email Templates](#) [Labels](#) [Members](#) [Program Setup](#) **Settings** [Sharing](#) [Sub-Organizations](#)

Settings

[Click on the Maintenance tab](#)[Options](#)[API Key](#)[Default Display Fields](#)[Email](#)**Maintenance**[Salesforce](#)[Units](#)[Save Changes](#)

Maintenance Actions

The following actions have destructive effects, please read all warnings after clicking an option.

[⚠ Delete Organization](#)

The Maintenance tab allows the deletion of an organization

Salesforce: Configure from within SEED

Settings

- Options
- API Key
- Default Display Fields
- Email
- Maintenance
- Salesforce**
- Units

⇌ Salesforce Integration

Check this checkbox if you would like to sync data between SEED and a Salesforce instance

Enable Salesforce Integration

📡 Salesforce Connection

Enter your Salesforce instance details and ensure your connection is successful

Salesforce URL	<input type="text"/>
Username	<input type="text"/>
Password	<input type="password"/> 
Security Token	Security token set in Salesforce <input type="password"/> 
Domain	If your Salesforce instance is a sandbox, set this field to the value 'test'; otherwise leave blank. <input type="text"/>

Salesforce: Configure from within SEED

🕒 Scheduled Daily Update

If you would like to automatically update Salesforce on a daily basis, configure the fields below

Hour Enter the hour when the update should be run daily (0-23) Timezone: America/Los_Angeles

Minute Enter the minute after the hour when the update should be run daily (0-59)

Logging Email Enter the e-mail address to use when reporting errors during the Salesforce updating process

Last Salesforce Update

Reset

Sync Salesforce

Salesforce: Configure from within SEED

Configuration

Configure a few parameters needed for data transfer to Salesforce

Indication Label Label used to designate that a SEED property should be updated in Salesforce. Example: 'Add to Salesforce'

Violation Label Label used to designate that a SEED property has a violation. Example: 'Violation - Insufficient Data'

Compliance Label Label used to designate that a SEED property is in compliance. Example: 'Complied'

Salesforce Unique Benchmark ID Fieldname Fieldname of the Salesforce field that is used to uniquely identify Benchmark records. Example: 'Salesforce_Benchmark_ID__c'

SEED Unique Benchmark ID Column Fieldname of the SEED field that is used to uniquely identify Benchmark records. Example: 'Salesforce Benchmark ID'

Cycle Name Benchmark Field If your Salesforce Benchmark Record stores cycle name, please enter the name of the salesforce field here, ex: Cycle__c

Status Label Benchmark Field If your Salesforce Benchmark Record stores a Status Label value (ex: violation or compliant), please enter the name of the salesforce field here, ex: Status__c

All Labels Benchmark Field If your Salesforce Benchmark Record stores a string of all SEED labels applied, please enter the name of the Salesforce field here, ex: SEED_Labels__c

Salesforce: Configure from within SEED

Contacts and Accounts

Configure the contact information used for benchmark status notifications in Salesforce. When configured, this functionality will create or update contact records in Salesforce and link them to the Benchmark object

Salesforce Account Object Record Type

If your Salesforce instance has multiple account types, provide the Record Type ID of the type of account to use when accounts are automatically created from SEED

Salesforce Contact Object Record Type

If your Salesforce instance has multiple contact types, provide the Record Type ID of the type to use when contacts are automatically created from SEED

Account Name

Select the SEED field that holds the account name for the contact record. Ex: 'Organization'

Contact Name Column

Select the SEED field that holds the contact name for the benchmark record. Ex: 'On Behalf Of'

Contact Email Column

Select the SEED field that holds the contact email for the benchmark record. Ex: 'Email'

Contact Benchmark Field

If your Salesforce Benchmark Record stores a Salesforce Contact relation, provide the Salesforce field name here, ex: Contact_Name__c

Salesforce: Configure from within SEED

⚙️ Salesforce Field Mappings

Map your Salesforce Benchmark Object's fields to columns in SEED. Use the Object Manager in Salesforce to retrieve the field names (not the field labels), ex: Cycle__c (not Cycle). These fields will only be sent to Salesforce when a property has the compliant label applied.

Salesforce Field Name	SEED Field Name	
<input type="text" value="ENERGY_STAR_Score_c"/>	<input type="text" value="ENERGY STAR Score"/> ▼	<input type="button" value="✕"/>
<input type="text" value="Portfolio_Manager_Property_ID_c"/>	<input type="text" value="PM Property ID"/> ▼	<input type="button" value="✕"/>
<input type="text" value="Site_EUI_kBTU_ft2_c"/>	<input type="text" value="Site EUI (kBtu/ft²/year)"/> ▼	<input type="button" value="✕"/>
<input type="text" value="Total_GHG_Emissiosn_Metric_tons_CO2e_c"/>	<input type="text" value="Total GHG Emissions (t/year)"/> ▼	<input type="button" value="✕"/>

Settings: Units

BPS Test [Click on the Settings link](#)

- Column Settings
- Column Mappings
- Cycles
- Data Quality
- Derived Columns
- Email Templates
- Labels
- Members
- Program Setup
- Settings**
- Sharing
- Sub-Organizations

Settings

[Click on the Default Display Fields tab](#)

- Options
- API Key
- Default Display Fields
- Email
- Maintenance
- Salesforce
- Units**

Measurement unit display for energy use intensities (EUI)

kBtu/sq. ft./year

You can change the Units for EUI

- kBtu/sq. ft./year**
- GJ/m²/year
- MJ/m²/year
- kWh/m²/year
- kBtu/m²/year

Meter energy display units (change one at a time)

----Choose energy type----

You can change the Units used in the display of the Meter Data (Property Detail View / Meters) See the next page for more details

----Change display unit----

Measurement unit display for areas

square feet

You can change the Units for area (SI/IP)

- square feet**
- square metres

Number of decimal places to display

2 (e.g., 0.12)

You can change the number of decimal places displayed

- 0 (e.g., 0)
- 1 (e.g., 0.1)
- 2 (e.g., 0.12)**
- 3 (e.g., 0.123)
- 4 (e.g., 0.1234)

Thermal Conversion Assumption

US

You can change the thermal conversion assumption between the US and Canada

- US**
- Canada

Save Changes

Warning: Meters will be imported as and viewed according to this assumption.

Settings: Units (cont'd)

BPS Test [Click on the Settings link](#)

Column Settings Column Mappings Cycles Data Quality Derived Columns Email Templates Labels Members Program Setup **Settings** Sharing Sub-Organizations

Save Changes

Step 3: Click the Save Changes button

Step 1:

- Select the Fuel from the first pulldown list
- It will have a default set of units displayed

Step 4: In Property Details / Meters, the Natural Gas data is now displayed in therms

Step 2: Select the "display unit" if you want to change it, in this case from kBtu to therms

Measurement unit display for energy use intensities (EUI)

kBtu/sq. ft./year

Meter energy display units (change one at a time)

Natural Gas | kBtu (thousand Btu)

therms

Measurement unit display for areas

square feet

Number of decimal places to display

2 (e.g., 0.12)

Thermal Conversion Assumption

US

Meter energy display units (change one at a time)

Natural Gas | kBtu (thousand Btu)

- Choose energy type----
- Coke | kBtu (thousand Btu)
 - Wood | kBtu (thousand Btu)
 - Diesel | kBtu (thousand Btu)
 - Other: | kBtu (thousand Btu)
 - Propane | kBtu (thousand Btu)
 - Kerosene | kBtu (thousand Btu)
 - Natural Gas | kBtu (thousand Btu)**
 - District Steam | kBtu (thousand Btu)
 - Electric - Grid | kWh (thousand Watt-hours)
 - Electric - Wind | kWh (thousand Watt-hours)

kBtu (thousand Btu)

- Change display unit----
- ccf (hundred cubic feet)
 - cf (cubic feet)
 - cm (cubic meters)
 - GJ
 - kBtu (thousand Btu)
 - kcf (thousand cubic feet)
 - MBtu/MMBtu (million Btu)
 - Mcf (million cubic feet)
 - therms**

Start Time	End Time	Natural Gas - GB - 4864658 (therms)
2014-01-01 00:00:00	2014-01-02 00:00:00	0.00
2013-12-31 00:00:00	2014-01-01 00:00:00	2.08

Sharing Your Data

Click on the **Sharing** link

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"/>	PropertyState	Audit Template Building ID
<input type="checkbox"/>	PropertyState	City
<input type="checkbox"/>	PropertyState	Owner
<input type="checkbox"/>	PropertyState	Owner Email
<input type="checkbox"/>	PropertyState	PM Property ID
<input type="checkbox"/>	PropertyState	Postal Code
<input type="checkbox"/>	PropertyState	Property Name
<input type="checkbox"/>	PropertyState	Property Type
<input type="checkbox"/>	PropertyState	State
<input type="checkbox"/>	PropertyState	Total GHG Emissions Intensity (kg/ft ² /year)
<input type="checkbox"/>	PropertyState	Year Built

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.

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 #

Sub-Organizations

SEED PLATFORM™

Parent Organization → Current Organization: LBNL 302 ▾

← Organizations

LBNL 302

Click on the **Sub-Organizations** link

Column Settings Column Mappings Cycles Data Quality Derived Columns Email Templates Labels Members Program Setup Settings Sharing **Sub-Organizations**

Sub-Organizations

Create a new sub-organization

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

Create a New Sub-Organization

Sub-Org Name:

Invite an Owner:

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

Cancel

Create New Sub-Organization

The owner of a Parent Organization can create 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)

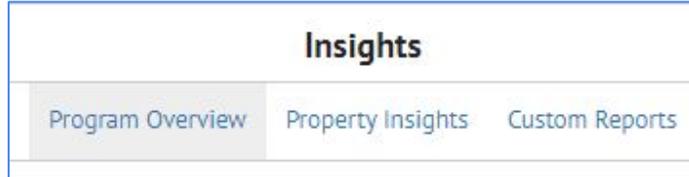
Parent / Sub-Organization Roles

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

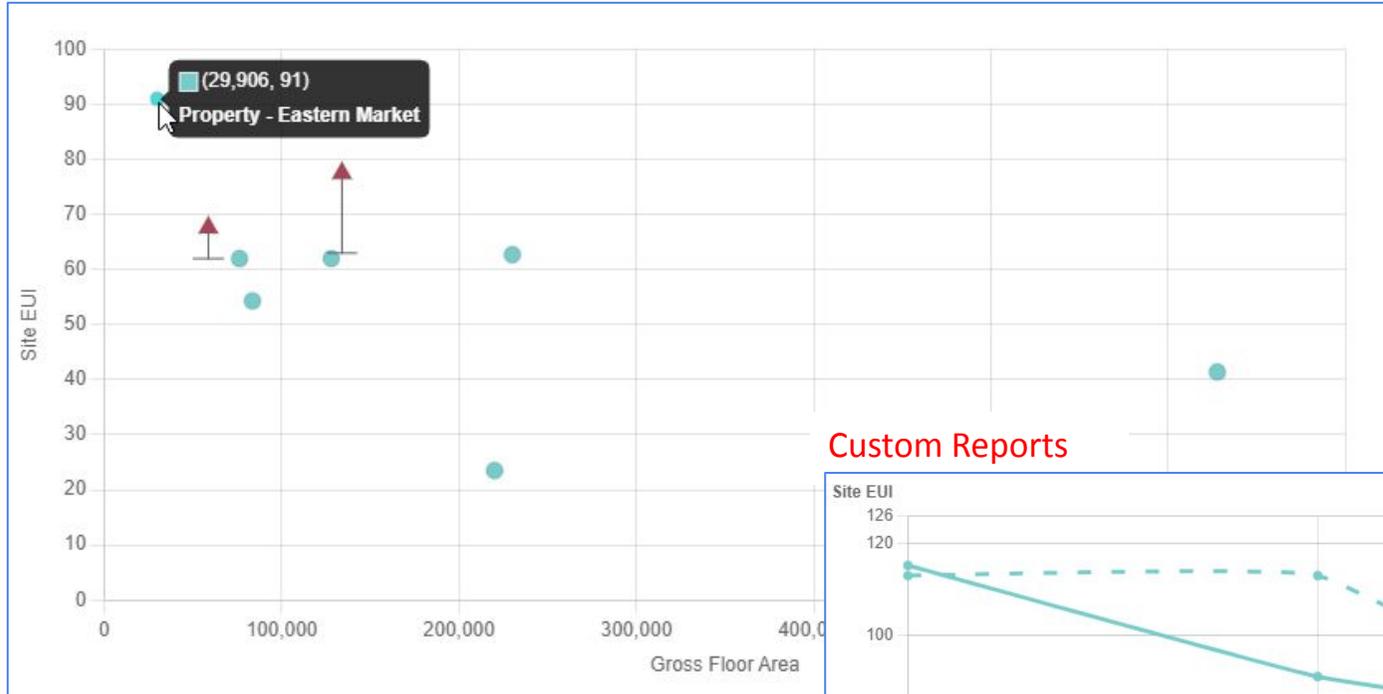
	Parent	Sub Organization		
		Owner	Member	Viewer
Set fields for display between Sub-Org	X			
Create Sub Orgs	X			
Add Members	X To parent or at Sub org setup	X To own Suborg		
Remove Members	X In parent	X From own Sub org		
View Members	X In parent Owner(s) of suborg	X In own Sub org		
Change Settings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

There are three options for the INSIGHTS navigation bar

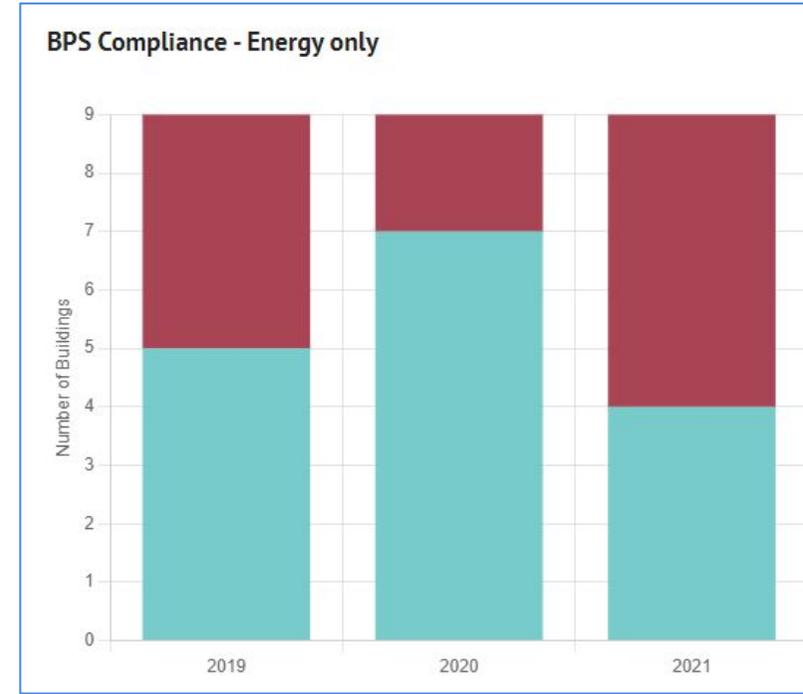
- Program Overview
- Property Insights
- Custom Reports



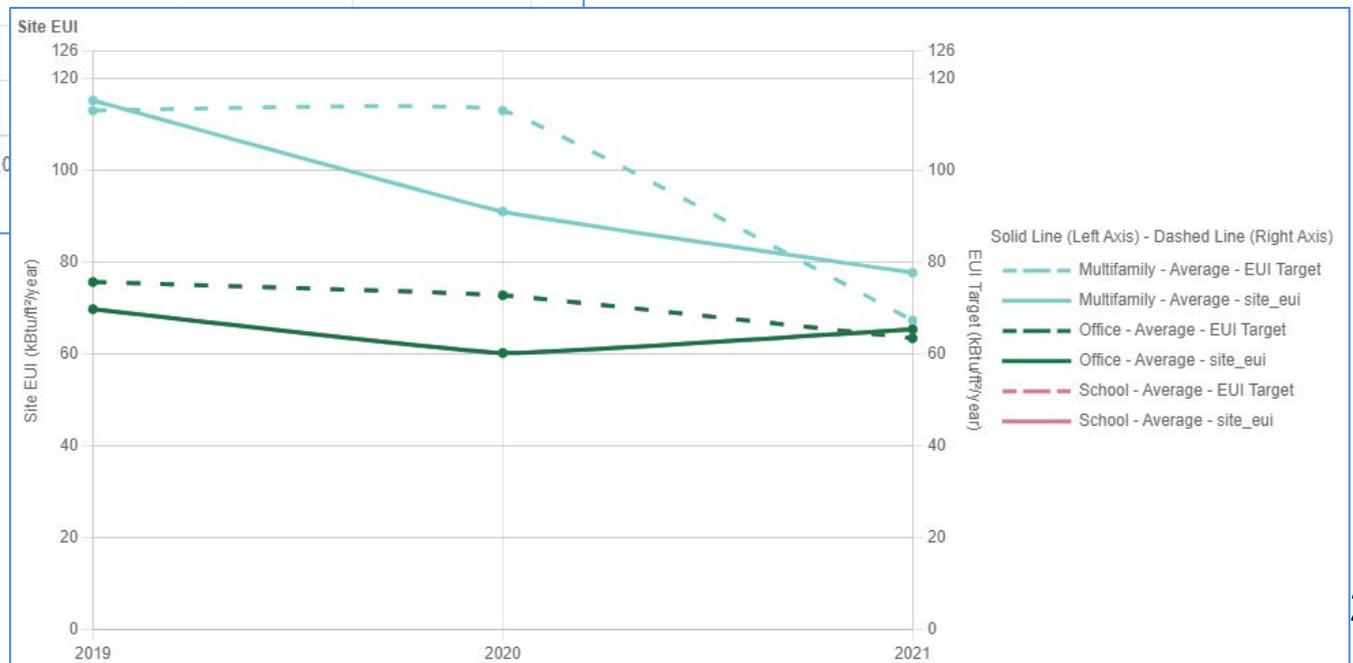
Property Insights



Program Overview

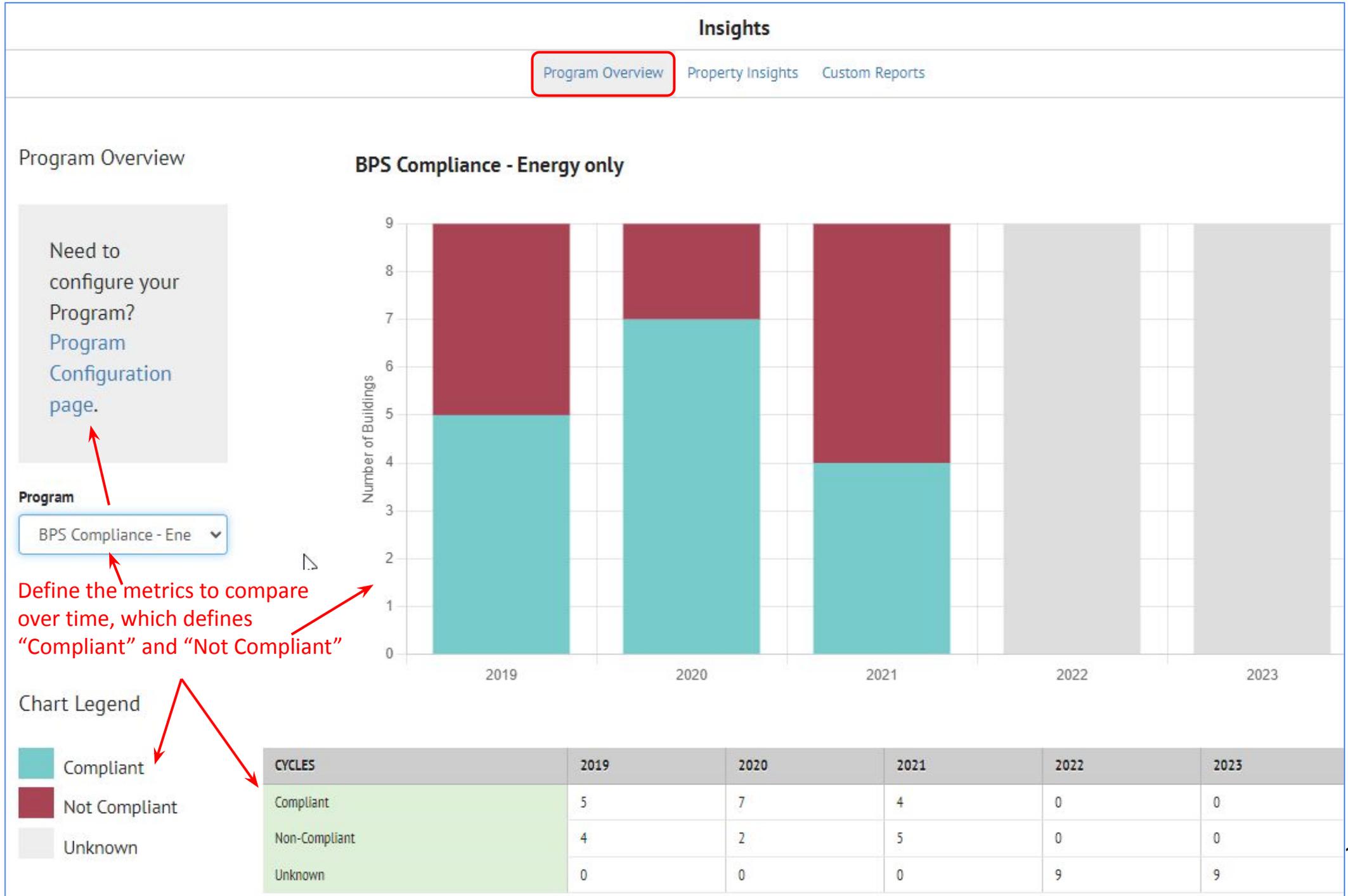


Custom Reports



Program Overview

Program Overview shows portfolio compliance with a performance target over time (cycles)



Property Insights show compliance for individual buildings

Property Insights

Program Overview
Property Insights
Custom Reports

Property Insights

Need to configure your Program? [Program Configuration page.](#)

Program

BPS Compliance - Energ ▼

Cycle

2020 ▼

Metric Type

Energy Metric ▼

X Axis

Property Type ▼

Export

- Hover over a point to see information about the Property
- Click on the point to go to the Inventory Detail view for that property

Select the Program →

Select the Cycle →

Select the X Axis →

	2020
Compliant	7
Non-Compliant	2
Unknown	0

Chart Legend

● Compliant

▲ Not Compliant

Custom Reports shows the metric trend over time for a collection of buildings

Select the Filter Group, Cycles and Left and Right Axis to display the trend graph

▼ Config

CUSTOM REPORTS

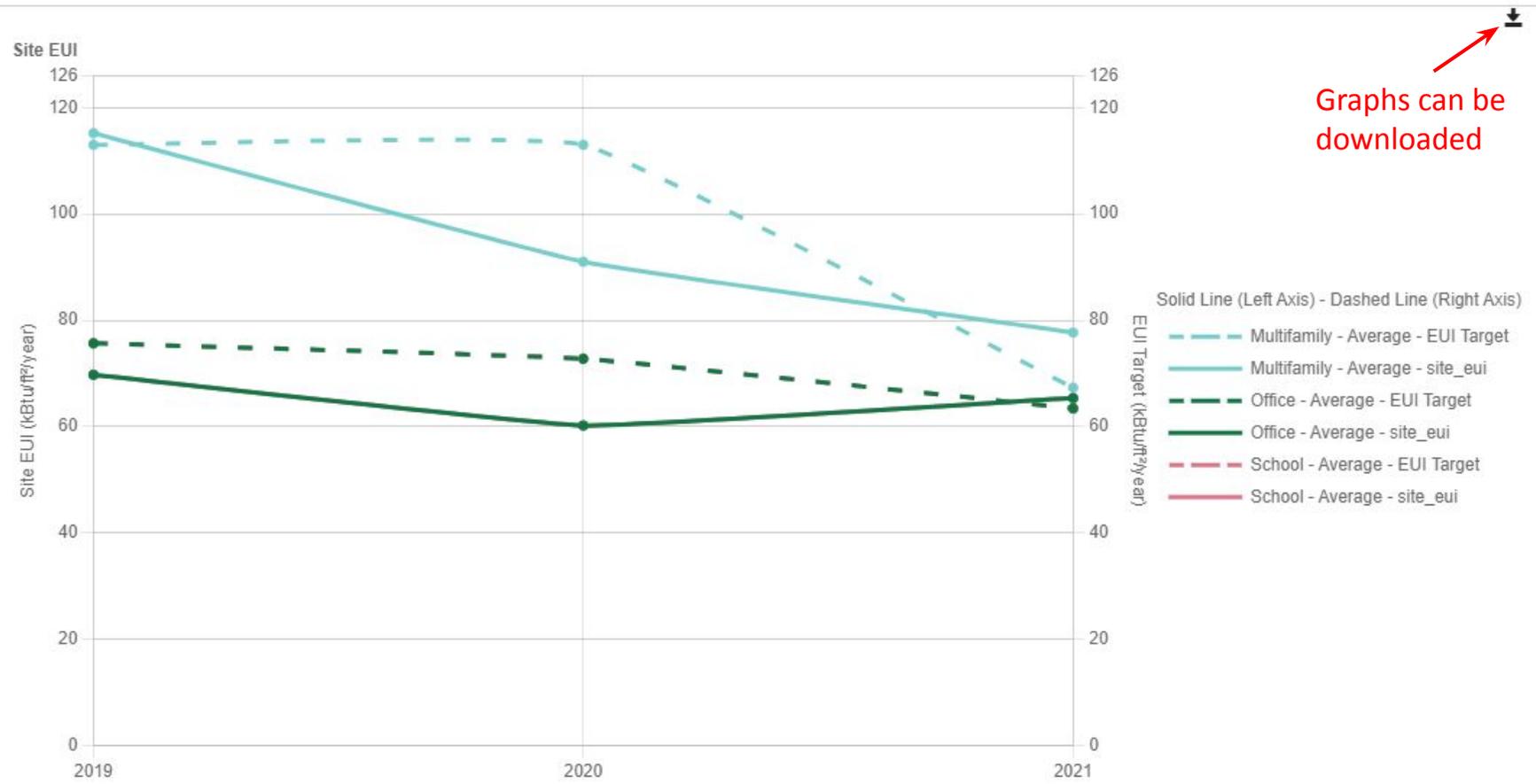
Site EUI ✕

+ New Custom Report

FILTER GROUPS	CYCLES	LEFT AXIS	RIGHT AXIS
Multifamily	2019	Column Site EUI (kBtu/ft ² /year) (eui)	Column EUI Target (kBtu/ft ² /year) (eui)
Office	2020	Average	Average
School	2021	Minimum	Minimum
		Maximum	Maximum
		Sum	Sum
		Count	Count

ACTIONS

Delete Edit



Graphs can be downloaded

Import data over time in different cycles

Cycle: 2019

- 2019
- 2020
- 2021
- 2022
- 2023

In this example there are 5 years of data in the Inventory list

Properties

Column List Profiles Reports **Cross-Cycles**

The Cross-Cycle comparison in the Property List view can be used to see the data for each cycle

View by Property		View by Tax Lot				
+	Cycle	Cycle Start	PM Property ID*	Address Line 1*	Total GHG Emissions	
-	total cycles: 5		22482007	2425 N STREET NW		
i	2019	2018-12-31	22482007	2425 N STREET NW	562.20	
i	2020	2019-12-31	22482007	2425 N STREET NW	511.40	
i	2021	2020-12-31	22482007	2425 N Street NW	553.40	
i	2022	2021-12-31	22482007	2425 N STREET NW		
i	2023	2022-12-31	22482007	2425 N STREET NW		

There is Greenhouse Gas (GHG) emission data for the first three years of data

Setting up the data

- Import metrics (ie, Site EUI or GHG emissions) for each building as well as targets for those metrics
- Define “derived fields” to calculate target “deltas” if that is useful

A derived field:

Target EUI - Site EUI

A negative value means the actual EUI is > the target EUI and therefore is non-compliant

Cycle:

Actual building Site EUI for 2020

A Target Site EUI for 2021

View by Property						View by Tax Lot			
PM Property ID	Site EUI (kBtu/ft ² /year)	EUI Target (kBtu/ft ² /year)	EUI Target Year	Delta EUI					
22178844	23.50	62.00	2021	38.5					
22178845	41.40	62.00	2021	20.6					
22178846	67.60	62.00	2021	-5.6					
22178848	77.50	63.00	2021	-14.5					
22178850	91.00	113.00	2021	22					

These 2 buildings did not meet their target EUI

Click on the Program Configuration link to define the criteria for these reports

Insights
Program Overview
Property Insights
Custom Reports

Program Overview

Need to configure your Program? [Program Configuration page.](#)

Program

BPS Compliance - Energy only

[Export](#)

Chart Legend

- Compliant
- Not Compliant
- Unknown

BPS Compliance - Energy only

The cycles defined for the program →

CYCLES	2019	2020	2021	2022	2023
Compliant	5	7	4	0	0
Non-Compliant	4	2	5	9	9
Unknown	0	0	0	0	0

There are two different ways to get to the Program Setup page

The screenshot shows the top navigation bar with 'INSIGHTS' and 'ORGANIZATIONS 1'. Below it is a card for 'BPS Test' with tabs for 'Data Quality', 'Derived Columns', 'Email Templates', 'Labels', 'Members', and 'Program Setup'. A red box highlights the 'Program Setup' tab. To the left, a sidebar contains the text 'Need to configure your Program? Program Configuration page.' with a red box around it. Red arrows point from the text above to the 'INSIGHTS' and 'ORGANIZATIONS' tabs, and from the 'Program Setup' tab to the 'Program Configuration' page below.

The screenshot shows the 'Program Configuration' page. On the left, there is a list of programs under the heading 'PROGRAM': 'New Program', 'BPS Compliance - GHG Only', 'BPS Compliance - Energy only', and 'BPS Compliance Both Metrics'. A red box highlights this list. Below the list is a green button labeled 'New Program'. On the right, there is a message: 'No program selected' with a back arrow and the text 'Select a Program to get started!'. Red arrows point from the text above to the 'Program Setup' tab in the previous screenshot and to the 'Program Configuration' page. Red arrows also point from the text below to the program list and the 'New Program' button.

Click on an existing Program to edit it

Click on the New Program button to create a new Program

There are three components to define on the Program Configuration page
The next few pages will discuss each section in detail

Click on an existing
Program name to Edit it

General Settings to set the
compliance period and
filter groups

Metric Type Settings to define "compliance"

Delete

Save Changes

Program Configuration

PROGRAM

- BPS Compliance - Energy only
- New Program
- BPS Compliance - GHG Only
- BPS Compliance Both Metrics

GENERAL SETTINGS

Configure your program metric to enable visualizations on the **program overview** page.

PROGRAM DEFINITION

Name

Compliance Period (years) to

Filter Group

VISUALIZATION SETTINGS

Select at least one field which will serve as the x-axis for visualizations on the **property insights** page. Multiple fields can be selected.

X-AXIS FIELD OPTIONS

- Gross Floor Area (ft²)
- Postal Code
- Year Built
- Property Type

METRIC TYPE SETTINGS

The overall metric can be made up of an energy metric, an emission metric, or both. At least one type of metric is required and if two are defined, then both metrics must be met for compliance.

ENERGY METRIC		EMISSION METRIC	
Actual Field	<input type="text" value="Site EUI (kBtu/ft<sup>2</sup>/year)"/>	Actual Field	<input type="text"/>
Target Field	<input type="text" value="EUI Target (kBtu/ft<sup>2</sup>/year)"/>	Target Field	<input type="text"/>
Type	<input type="text" value="Target > Actual for Compliance"/>	Type	<input type="text"/>

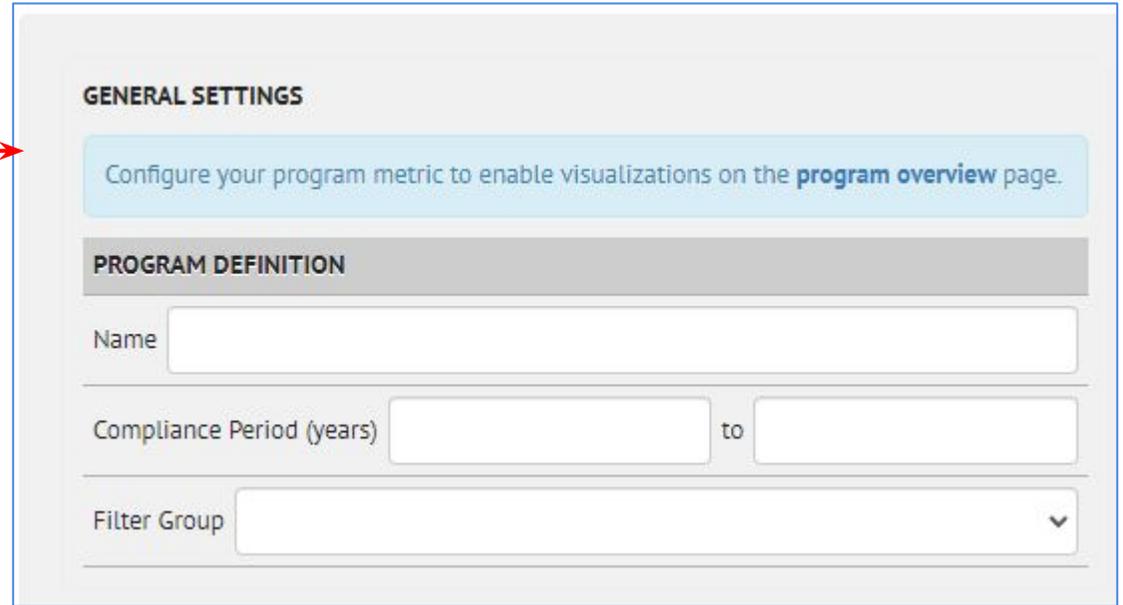
Click on the
New Program
button to
create a new
program

Visualization Settings to
define parameters for the
Custom Reports

Program Configuration: General Settings



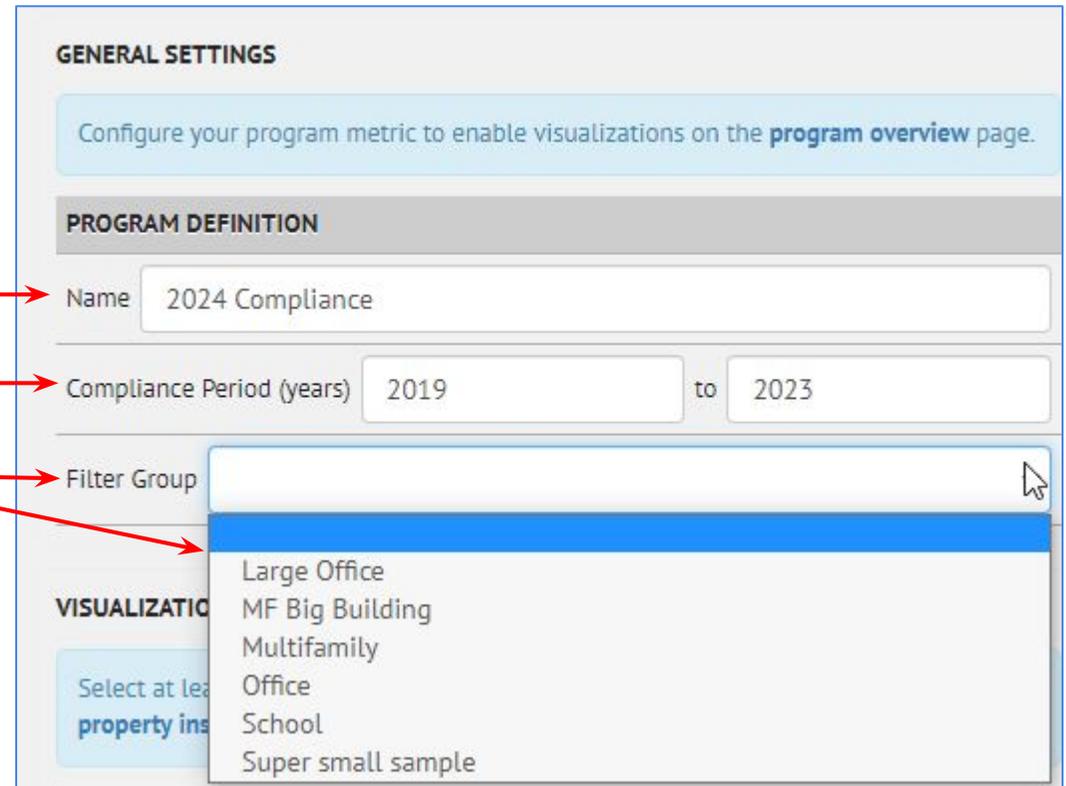
Step 2: all the fields will be blank



Step 1: Click on the New Program button to create a new program

Step 3: Fill in the values for

- Name
- Compliance Period
The cycles to include in this Program
- Filter Group
These are defined in the Inventory List



Program Configuration: Metric Type Settings

It is possible to define just an Energy Metric, just an Emission Metric, or both
 You have to define at least one in order to save the settings

METRIC TYPE SETTINGS

The overall metric can be made up of an energy metric, an emission metric, or both. At least one type of metric is required and if two are defined, then both metrics must be met for compliance.

ENERGY METRIC	EMISSION METRIC
Actual Field <input type="text"/>	Actual Field <input type="text"/>
Target Field <input type="text"/>	Target Field <input type="text"/>
Type <input type="text"/>	Type <input type="text"/>

Define the fields

The pulldown list will show all the fields for the property

ENERGY METRIC

Actual Field

Target Field

Type

- Site EUI (kBtu/ft²/year)
- National Median Site EUI (kBtu/ft²/year)
- National Median Source EUI (kBtu/ft²/year)
- Occupancy Percent
- Occupied Floor Area (ft²)
- Parking Floor Area (ft²)
- Site EUI (kBtu/ft²/year)
- Site EUI Modeled (kBtu/ft²/year)
- Site EUI Weather Normalized (kBtu/ft²/year)
- Source EUI (kBtu/ft²/year)

The Type pulldown list defines Compliance, i.e., how the Target and the Actual values are compared.

Type

- Target > Actual for Compliance
- Target < Actual for Compliance

Save your changes

Program Configuration: Visualization Settings

The Visualization Settings are relevant for the Property Insights view

Property Insights

Need to configure your Program? Program Configuration page.

Program
BPS Compliance

Cycle
2021

Metric Type
Energy Metric

X Axis
Gross Floor Area

VISUALIZATION SETTINGS

Select at least one field which will serve as the x-axis for visualizations on the **property insights** page. Multiple fields can be selected.

X-AXIS FIELD OPTIONS

- Address Line 1
- Address Line 2
- Associated Tax Lot ID
- Audit Template Building ID
- Building Certification
- Building Count
- Buildings and Parking Floor Area (ft²)
- Buildings Floor Area (ft²)
- City
- Conditioned Floor Area (ft²)

Compliant

Non-Compliant

Unknown

The selected fields will be displayed in the pulldown menu in Property Insights

Gross Floor Area

Postal Code

Year Built

Property Type

VISUALIZATION SETTINGS

Select at least one field which will serve as the x-axis for visualizations on the **property insights** page. Multiple fields can be selected.

X-AXIS FIELD OPTIONS

- Gross Floor Area (ft²)
- Postal Code
- Year Built
- Property Type

Define the X-Axis Field Options from the list of all fields.

Define as many fields as needed

Custom Report Setup

The Visualization Settings are relevant for the Property Insights view



Custom Reports

Program Overview | Property Insights | **Custom Reports**

▼ Config

CUSTOM REPORTS

New Custom Report ✕

EUI Comparison ✕

➕ New Custom Report

FILTER GROUPS

All Properties

Multifamily

Office

↑ Select one or more filter groups to load your inventory.

CYCLES

2019 Compliance Year

2020 Compliance Year

2021 Compliance Year

2022 Compliance Year

2023 Compliance Year

↑ Select one or more cycles to populate the horizontal axis.

LEFT AXIS

Column: Total Marginal GHG Em

Average

Minimum

Maximum

Sum

Count

↑ Select one or more aggregation methods to show data on this axis.

RIGHT AXIS

Column: GHGI Target (kg/ft²)

Average

Minimum

Maximum

Sum

Count

↑ Select one or more aggregation methods to show data on this axis.

ACTIONS

Name: GHG Comparison

Cancel Save Changes

2 - Select the appropriate filter groups -- filter groups must be defined

4 - Select the field for the Left X Axis

5 - Select the field for the Right X Axis

7 - Name the report

1 - Click the New Custom Report button and a "New Custom Report" is created

3 - Select the appropriate cycles

6 - Select the Aggregation type for each axis; more than one can be selected

8 - Save the changes

Custom Report

CUSTOM REPORTS

GHG Comparison ✕

EUI Comparison ✕

+ New Custom Report

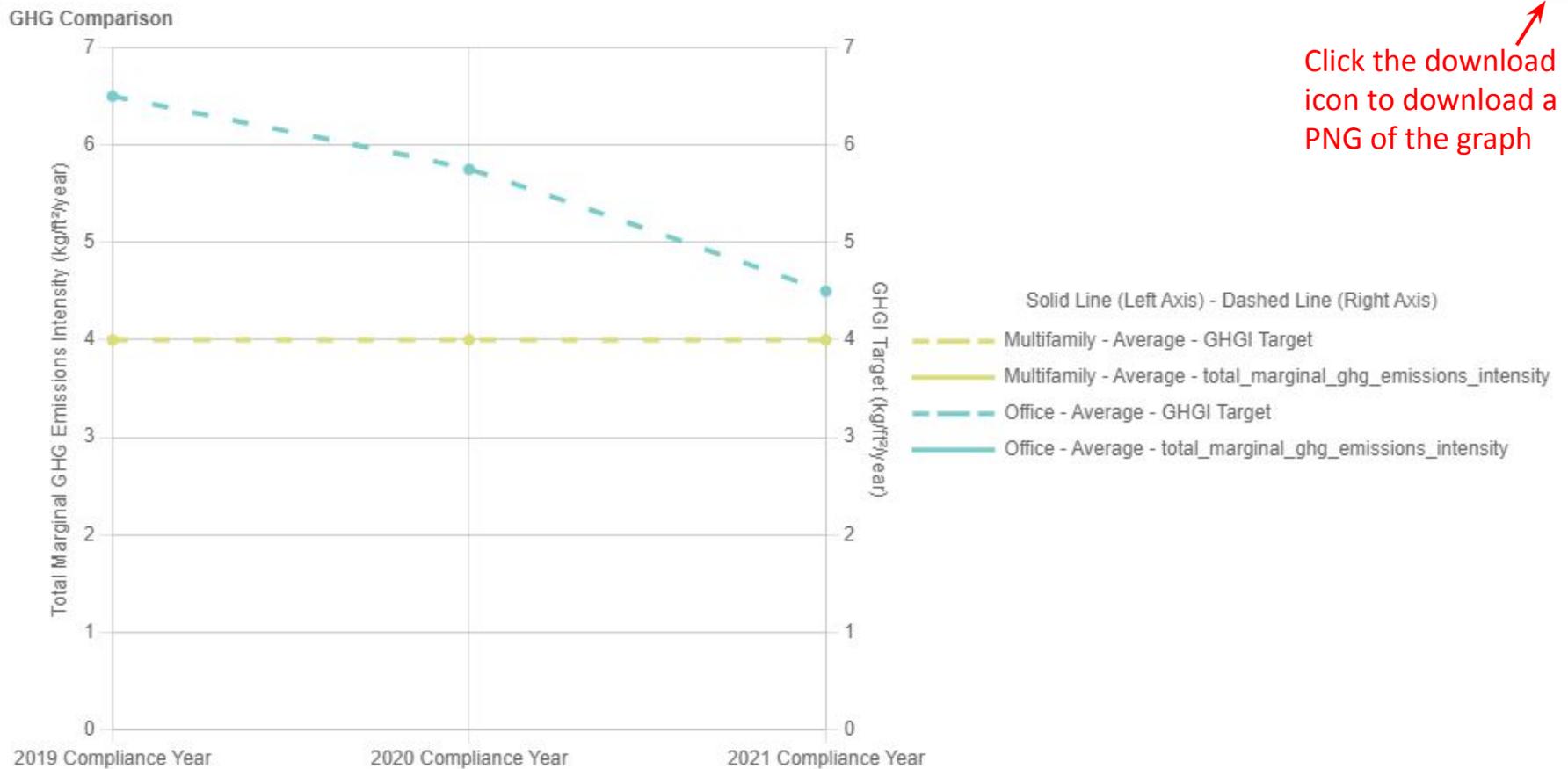
FILTER GROUPS	CYCLES	LEFT AXIS	RIGHT AXIS
Multifamily ▲	2019 Compliance Year ▲	Column: Total Marginal GHG Emissions Inter ▼	Column: GHGI Target (kg/ft ² /year) (ghg) ▼
Office ▼	2020 Compliance Year	Average	Average
	2021 Compliance Year ▼	Minimum	Minimum
		Maximum	Maximum
		Sum	Sum
		Count	Count

ACTIONS

Delete Edit

To change the parameters, click Edit

The resulting graph



Click the download icon to download a PNG of the graph

- **There are currently four different types of analysis in SEED**
 - **BSyncr**
 - Makes a Building Sync file from the property data in SEED to be used with the NMEC (Normalized Metered Energy Consumption) program
 - Algorithms are based on methods in this Github repository <https://github.com/kW-Labs/nmecr>
 - **BETTER**
 - Runs a BETTER analysis from the property data in SEED
 - **EUI**
 - Calculates the EUI of a property based on the meter data and the gross floor area
 - **Average Annual CO2**
 - Calculates the CO2 emissions of a property based on the meter data and the eGRID region (which is based on the location of the property)

There is a separate document which explains in detail the Analysis functionality

Swagger Interface to SEED RESTful APIs

Swagger
Supported by SMARTBEAR

https://seedv2.lbl.gov/api/swagger/?format=openapi Explore

SEED API ^{v3}

[Base URL: seedv2.lbl.gov/api]
https://seedv2.lbl.gov/api/swagger/?format=openapi

Test description

Schemes: HTTPS

Django **rdmitchell+302@lbl.gov** Django Logout Authorize

Filter by tag

- v1
- v2
- v2.1
- v3**

GET /v3/analyses/ v3_analyses_list

POST /v3/analyses/ v3_analyses_create Try it out

Parameters

Name	Description
data * required	
object (body)	Example Value Model
	<pre>{ name string title: Name maxLength: 255 minLength: 1 service* integer title: Service Enum: > Array [4] configuration Configuration</pre>

Contact

For SEED Platform™ Users:

Please visit our website for information, tutorials, and documentation to help you learn how to use SEED.

<https://seed-platform.org>

The SEED Users Forum is where you can review user announcements, workflow questions, and join to connect with other users.

<https://lists.buildingenergytools.org/g/SEEDusers/topics>

For direct help on a specific problem, please fill out a request on the building data tools website help desk:

<https://buildingdata.energy.gov/#/help-desk>

For SEED Platform™ Developers:

The open-source code is available on the GitHub organization of seed-platform and contains various repositories for the different components of the platform such as the main SEED application, a Python client to communicate to SEED's API and various example datasets.

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

The SEED Developers Forum contains various topics and joining enables you to connect with other developers. It is recommended to join this forum to submit developer questions, feature requests, and report issues as needed. Also, submitting issues on GitHub is encouraged.

<https://lists.buildingenergytools.org/g/SEEDdevelopers/topics>

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](#)

[View Terms of Service](#)

Development Team:

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

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

Version

2.18.0.c94869068

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