

Standard Energy Efficiency Data Platform™



U.S. DEPARTMENT OF
ENERGY

Energy Efficiency &
Renewable Energy



SEED PLATFORM™ 2.0

January 23, 2017

V 2.0 Database / Data Model Refactoring

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)

Database / Data Model Refactoring

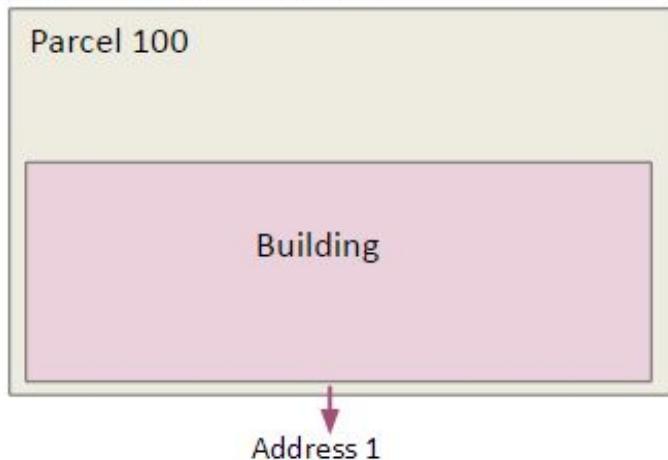
Tasks to achieve outcomes:

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

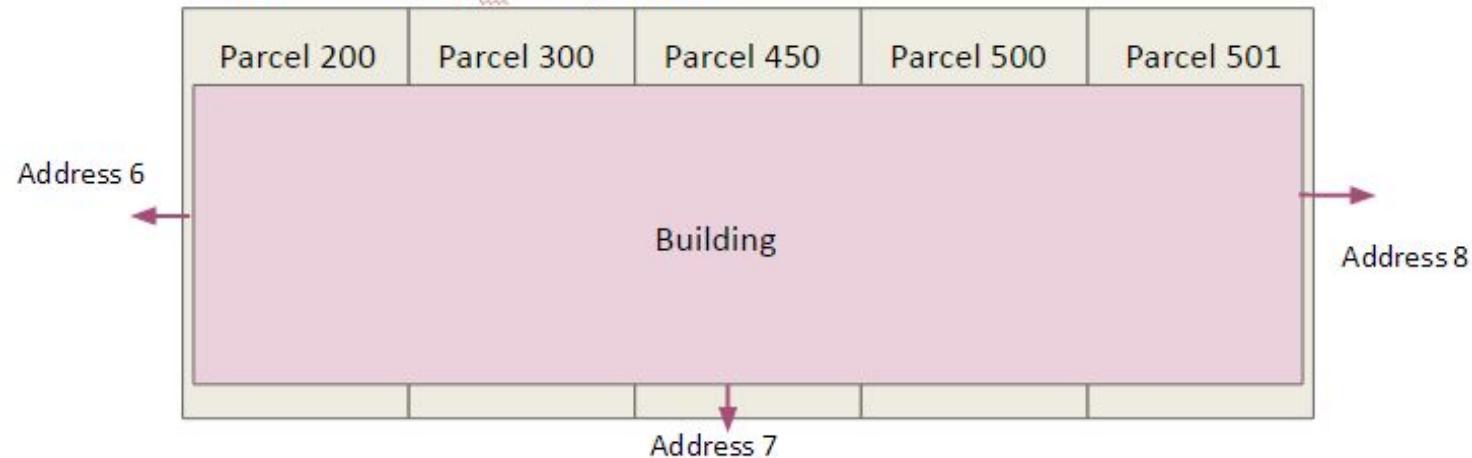
Physical reality of the data

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

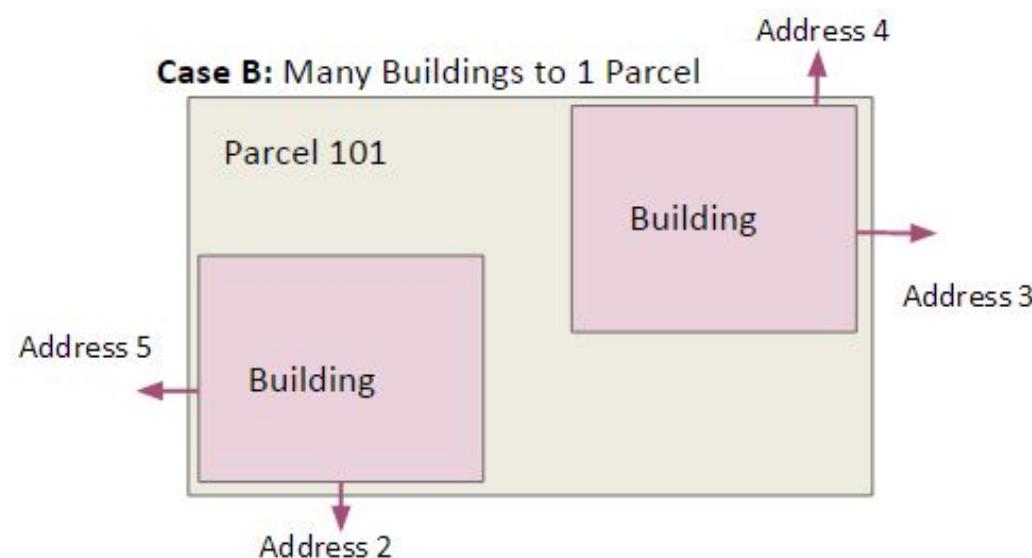
Case A: 1 Building to 1 Parcel



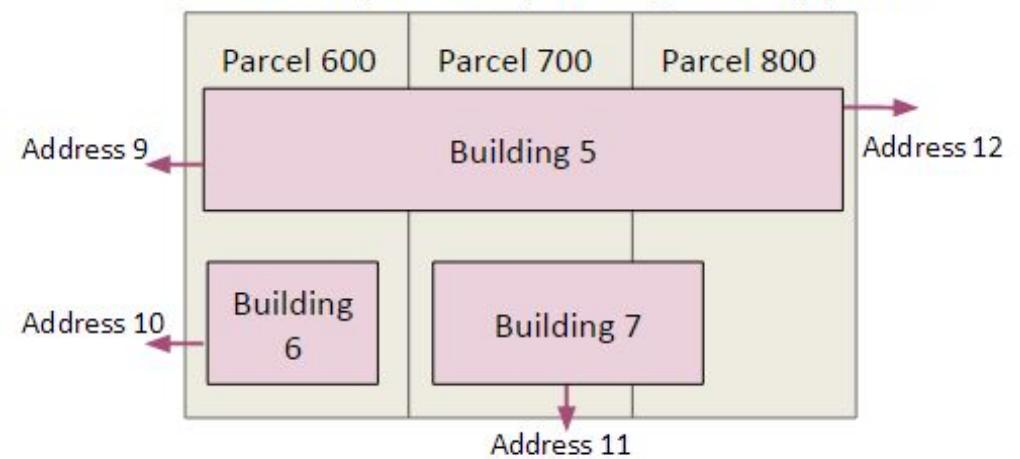
Case C: 1 Building to many Parcels



Case B: Many Buildings to 1 Parcel



Case D: Campus -- many buildings to many parcels



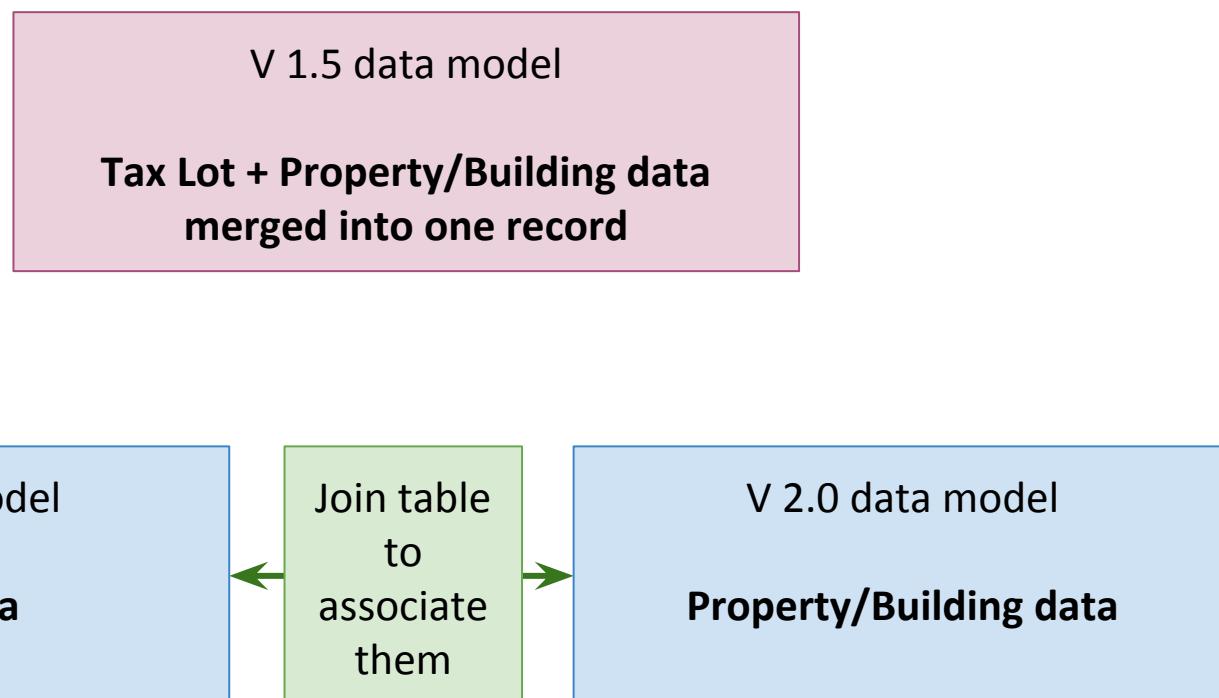
Comparing Data Models Between Versions 1.5 and 2.0

V 1.5 Data Model

- Tax Lot and Property/Building data were merged together into one record

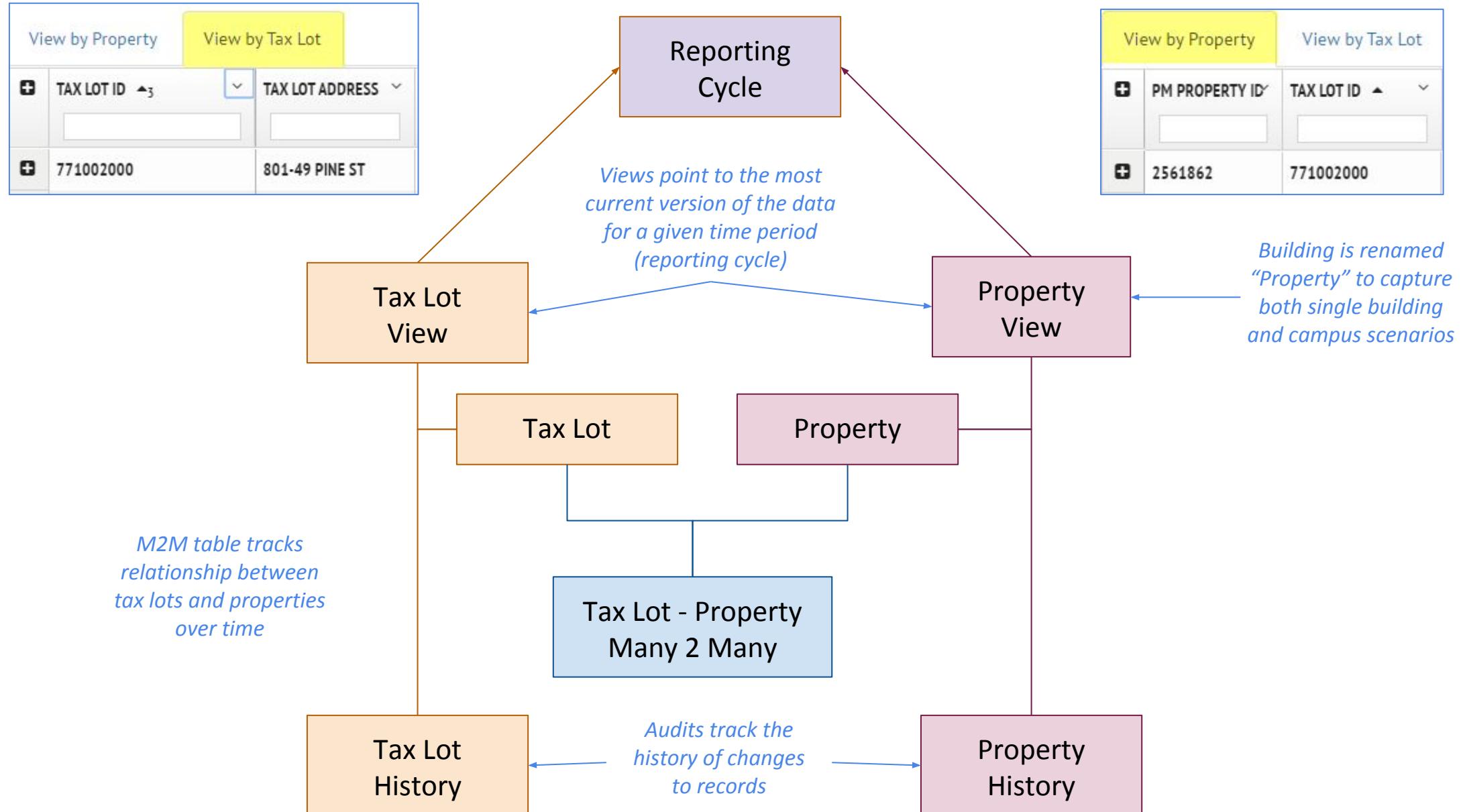
V 2.0 Data Model

- Tax Lot data and Property/Building data are kept in separate records and the relationship between them is stored in a separate “Join” table

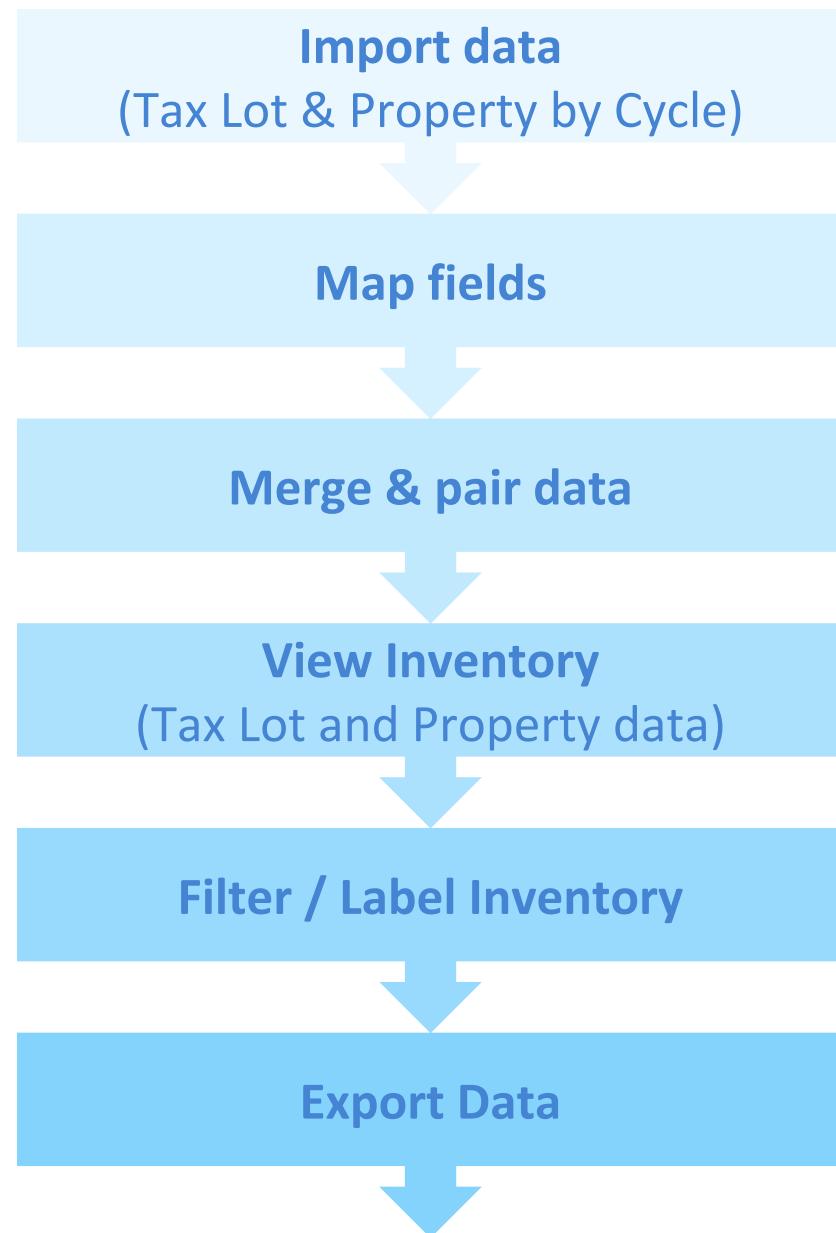


Data Model Schematic

- 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

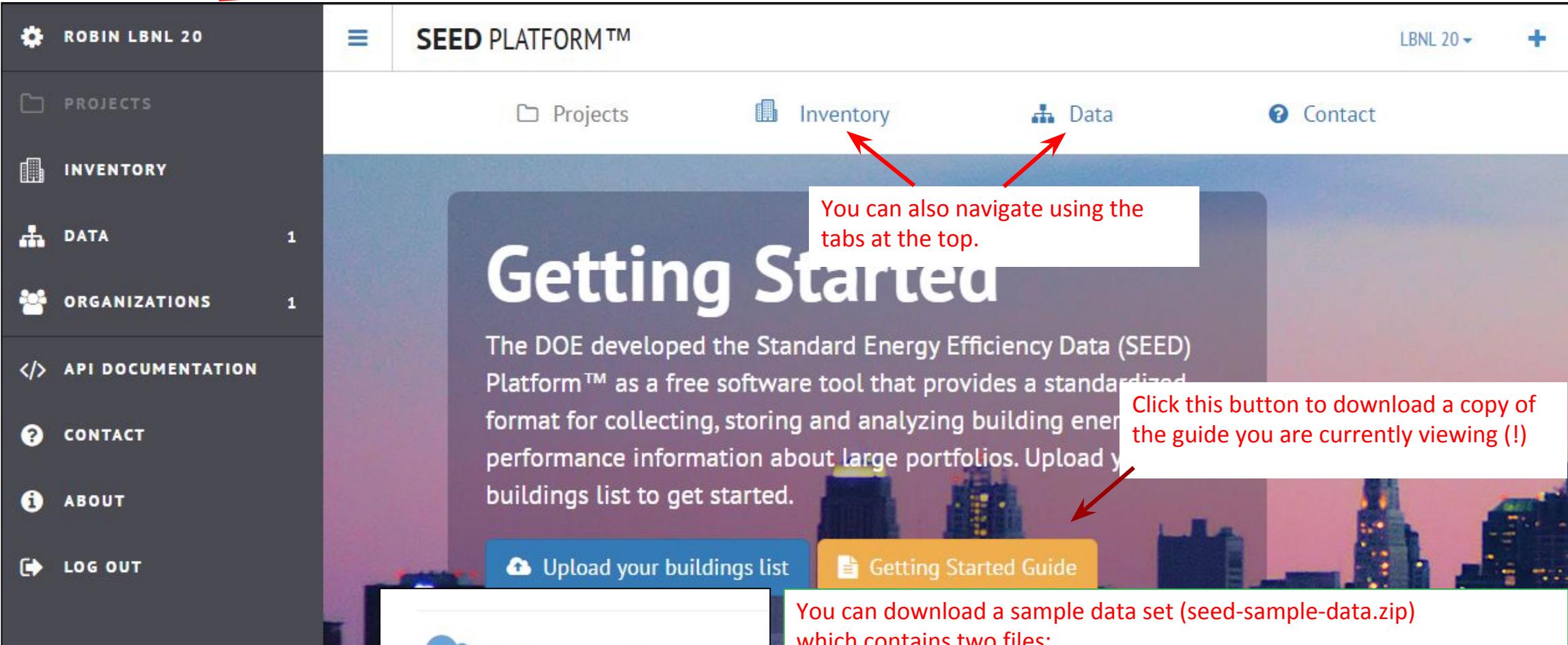


SEED Workflow



Home Page

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



The screenshot shows the SEED Platform home page. On the left is a dark sidebar with icons and labels: ROBIN LBNL 20, PROJECTS, INVENTORY, DATA (with 1 item), ORGANIZATIONS (with 1 item), API DOCUMENTATION, CONTACT, ABOUT, and LOG OUT. The main header says "SEED PLATFORM™". Below it are tabs: Projects, Inventory (highlighted with a blue arrow), Data, and Contact. A large central box says "Getting Started" and describes the platform. At the bottom are buttons for "Upload your buildings list" and "Getting Started Guide". A red box highlights the "Getting Started Guide" button with the instruction: "Click this button to download a copy of the guide you are currently viewing (!)".

ROBIN LBNL 20

PROJECTS

INVENTORY

DATA 1

ORGANIZATIONS 1

API DOCUMENTATION

CONTACT

ABOUT

LOG OUT

SEED PLATFORM™

Projects

Inventory

Data

Contact

Getting Started

The DOE developed the Standard Energy Efficiency Data (SEED) Platform™ as a free software tool that provides a standardized format for collecting, storing and analyzing building energy performance information about large portfolios. Upload your buildings list to get started.

Upload your buildings list

Getting Started Guide

You can also navigate using the tabs at the top.

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

Upload your data

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

Download Sample Data

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

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

Folders	Name
[seed-sample-data.zip]	covered-buildings-sample.csv
seed-sample-data	portfolio-manager-sample.csv

Navigation

Click to Expand and Contract the Navigation Side Bar



contracted

expanded

Organization

A vertical navigation sidebar on the left side of the page. It contains ten items, each with an icon and text: "ROBIN LBNL 20" (User Account), "PROJECTS" (disabled), "INVENTORY" (disabled), "DATA" (1 record), "ORGANIZATIONS" (1 record), "API DOCUMENTATION" (disabled), "CONTACT" (disabled), "ABOUT" (disabled), and "LOG OUT". The "ORGANIZATIONS" item has a red arrow pointing to it from the "Organization" text above.

User Account Name: Click to view information about the account

Projects: Disabled in V 2.0

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

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

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

API Documentation: Click to view the Swagger API documentation

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

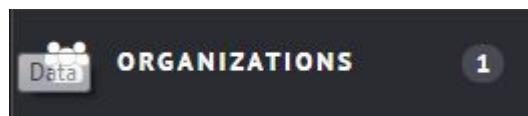
About: Click to view information about SEED development and funding

Log out: Click to log out of the program

Create Cycle in Organizations (before uploading data)

At least one cycle must be defined before importing data.

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



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

This screenshot shows the 'Organizations I Manage' section of the SEED Platform. It lists the organization 'LBNL 20' under 'ORGANIZATION'. Below it, there is a section for 'Sub-Organizations'. The 'Organizations I Belong To' section shows a single entry for 'LBNL 20' with details: Organization Name, Number of Properties (2016:512), Number of Tax Lots (2016:512), Your Role (owner), and Organization Owner (Robin LBNL 20).

The program will open up a view of that Organization.

This screenshot shows the main view for the organization 'LBNL 20'. At the top, there is a header with the organization name and a '+' button. Below the header, there are tabs: 'Settings', 'Sharing', 'Data Cleansing', 'Cycles' (which is highlighted with a red arrow), 'Labels', 'Sub-Organizations', and 'Members'. The 'Cycles' tab is currently active, showing a table for managing cycles. The table has columns for 'MEMBER NAME', 'MEMBER EMAIL', and 'MEMBER ROLE'. There is also a link 'Invite a new member'.

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

View, Edit and Create Cycles

The screenshot shows the SEED PLATFORM™ interface. At the top, there is a blue header bar with the text "SEED PLATFORM™" and "LBNL 302 Org". Below this is a navigation bar with tabs: "Settings", "Sharing", "Data Cleansing", "Cycles" (which is highlighted in blue), "Labels", "Sub-Organizations", and "Members".

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

The screenshot shows the "Cycles" page for the "LBNL 302 Org". The navigation bar at the top has the "Cycles" tab selected. On the left, there is a "Create new cycle" section with a text input field containing "2015 Compliance Cycle". To the right of this are "From date" and "To date" fields set to "01-01-2015" and "12-31-2015" respectively, each with a calendar icon. A "Create Cycle" button is located to the right of the date fields. Below this section is a table titled "Existing Cycles" with columns: NAME, FROM DATE, and TO DATE. It lists one row: "Default 2016 Calendar Year" with dates "01-01-2016" and "12-31-2016". An "edit" button is located to the right of the "TO DATE" column for this row.

There is a default Cycle provided by the program called **Default 2016 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
2015 Compliance Cycle	01-01-2015	12-31-2015
Default 2016 Calendar Year	01-01-2016	12-31-2016

Existing Cycles		
NAME	FROM DATE	TO DATE
2015 Compliance Cycle	01-01-2015	12-31-2015
2016 Compliance Cycle	01-01-2016	12-31-2016

Uploading Data - There are many ways to start

To start loading data, click the blue button labeled
“Upload your buildings list”

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

The screenshot shows the SEED Platform interface. On the left is a dark sidebar with navigation links: ROBIN LBNL 20, PROJECTS, INVENTORY (highlighted with a red arrow), DATA, ORGANIZATIONS, API DOCUMENTATION, CONTACT, ABOUT, and LOG OUT. The main area has a header with tabs: Projects, Inventory, Data, Contact, and a dropdown for LBNL 20. A large central banner says "g Started" and "Upload your buildings list". To the right of the banner is a "Create a new..." button with "Data Set" selected. A red arrow points from the "Data" link in the sidebar to a callout box on the banner that says "Click the Data navigation button to see existing Data Sets or create a new one". Another red arrow points from the "Data Set" button to the text "Or click the ‘+’ icon at the and, then select ‘Data Set’". Below the banner is a section titled "Highlights of SEED Platform™" with three items: "Upload your data", "Match your data", and "Manage compliance".

ROBIN LBNL 20

PROJECTS

INVENTORY

DATA

ORGANIZATIONS

API DOCUMENTATION

CONTACT

ABOUT

LOG OUT

SEED PLATFORM™

LBNL 20

Projects

Inventory

Data

Contact

Create a new...

Data Set

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

Upload your buildings list

Getting Started Guide

g Started

Upload your buildings list

Getting Started Guide

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

Upload your buildings list

Getting Started Guide

g Started

Upload your buildings list

Getting Started Guide

Highlights of SEED Platform™

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 project groupings to track the status of data submission, review, and compliance.

Download Sample Data

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

The diagram illustrates the workflow for creating a new data set. It begins with a 'DATA' navigation bar at the top left, which has a red arrow pointing to a list of '0 Data Sets'. This list includes columns for DATA SET NAME, # OF FILES, LAST CHANGED, CHANGED BY, and ACTIONS. A red arrow points from the 'Create new data set' link in the ACTIONS column to a 'Create a New Data Set' dialog box. The dialog box contains a 'Data Set Name' field with the value '2016 Benchmarking Compliance' and a 'Create Data Set' button.

Give the new data set a name

Click the Create Data Set button

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

DATA SET NAME	# OF FILES	LAST CHANGED	CHANGED BY	ACTIONS
				Create new data set

Create a New Data Set.

Data Set Name: 2016 Benchmarking Compliance

Create Data Set

Cancel

Add a file to the data set

Select the data type to upload, either:

- Spreadsheet (CSV, XLS, XLSX)
- Portfolio Manager (CSV, XLS, or XLSX)
- Green Button Data (XML) -- disabled

Upload your data.

Time Period:

Select a **Time Period** to associate with the data

Upload your data.

Time Period:

When a **Time Period (Cycle)** is selected, the **Upload** buttons become active

Click **Upload a Spreadsheet** to import

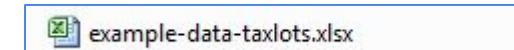
- Tax / Parcel lists
- Building lists

Click **Upload Portfolio Manager Data** to import

- Custom Report files generated from Portfolio Manager

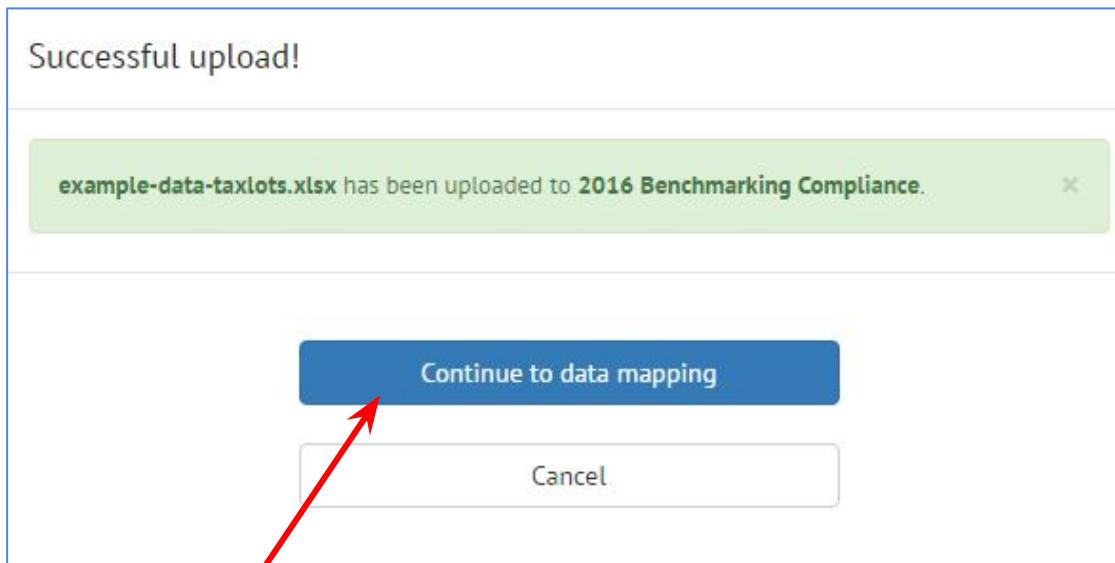
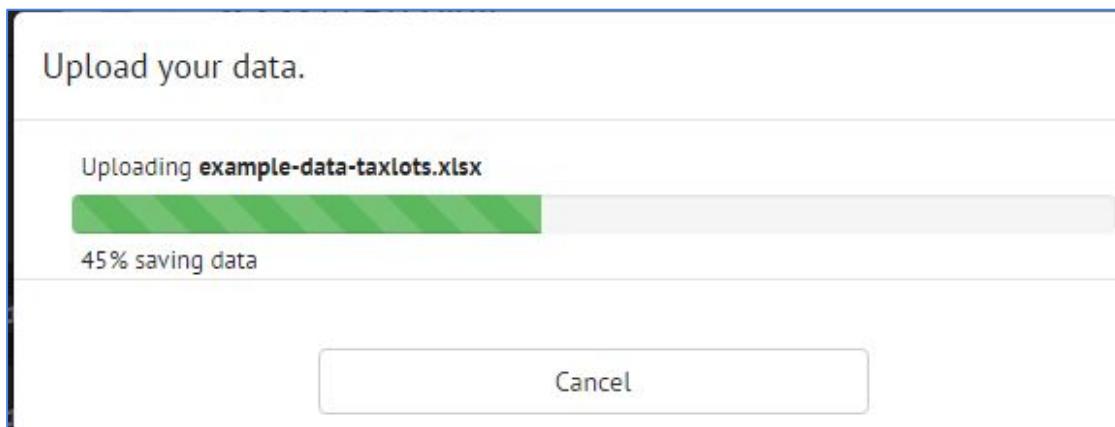
A browser window will open to select a file to upload

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



Upload Data

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



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

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

Mapping Fields

Directions for mapping data are at the top of the Mapping page.

◀ 2016 Benchmarking Compliance

Data Mapping & Validation (example-data-taxlots.xlsx)

STEP 1: Map Your Data

STEP 2: Review Your Data Mappings

BEDES

Collapse Tabs

MAPPING YOUR DATA TO SEED

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

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

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

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

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

Matching Fields:

SEED matches records between files (such as Tax Lot and Building lists and ENERGY STAR Portfolio Manager data) based on these four 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 match to each other

- **Jurisdiction Tax Lot ID**
- **PM Property ID (Portfolio Manager ID)**
- **Custom ID**
- **Address Line 1**

Mapping Fields

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

SEED HEADER	
jurisdiction	
Jurisdiction Tax Lot Id	
Jurisdiction Property Id	

The program will make a guess at an appropriate field name, which is not always correct or desired. The field names can get changed to another name if desired (see next page)

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

Map Your Data

SEED database Imported file

SEED example-data-taxlots.xlsx

Mapped Fields Set all fields to: Tax Lot

MAP SEED HEADER DATA FILE HEADER INVENTORY TYPE ROW 1 ROW 2 ROW 3

MAP	SEED HEADER	DATA FILE HEADER	INVENTORY TYPE	ROW 1	ROW 2	ROW 3
<input checked="" type="checkbox"/>	Jurisdiction Tax Lot Id	Parcel Number	Tax Lot	1552813	11160509	13334485
<input checked="" type="checkbox"/>	Address Line 1	Address	Tax Lot	050 Willow Ave SE	2655 Welstone Ave NE	93029 Wellington Blvd
<input checked="" type="checkbox"/>	City	City	Tax Lot	Rust	Rust	Rust
<input checked="" type="checkbox"/>	Number Properties	Number of Buildings	Tax Lot	1	2	
<input checked="" type="checkbox"/>	Gross Floor Area	Total Floor Area	Tax Lot	292029	390289	1234560
<input checked="" type="checkbox"/>	Owner	Owner	Tax Lot	Howard Mills	Ron Willard	Mary Rowan
<input checked="" type="checkbox"/>	Owner City State	Owner State	Tax Lot	CA	MI	CA
<input checked="" type="checkbox"/>	Owner Email	Owner Zip	Tax Lot	94530	45678	94530
<input checked="" type="checkbox"/>	Year Built	Year Built	Tax Lot	1975	1855	1942

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

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

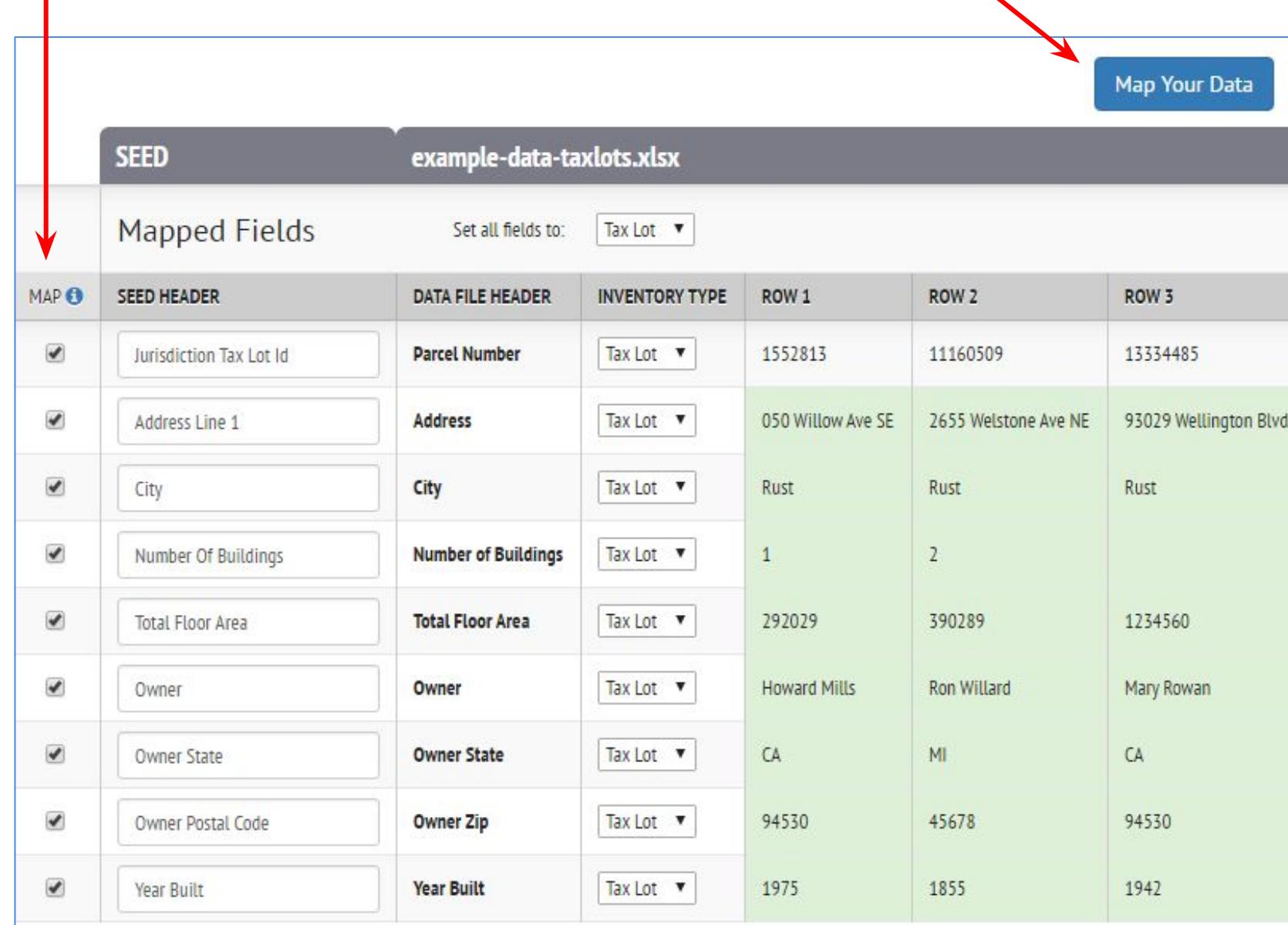
Matching

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

Mapping Fields

Unchecking the Map field means the program will not include the field in the data import

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



SEED		example-data-taxlots.xlsx				
Mapped Fields		Set all fields to: Tax Lot ▾				
MAP ⓘ	SEED HEADER	DATA FILE HEADER	INVENTORY TYPE	ROW 1	ROW 2	ROW 3
<input checked="" type="checkbox"/>	Jurisdiction Tax Lot Id	Parcel Number	Tax Lot ▾	1552813	11160509	13334485
<input checked="" type="checkbox"/>	Address Line 1	Address	Tax Lot ▾	050 Willow Ave SE	2655 Welstone Ave NE	93029 Wellington Blvd
<input checked="" type="checkbox"/>	City	City	Tax Lot ▾	Rust	Rust	Rust
<input checked="" type="checkbox"/>	Number Of Buildings	Number of Buildings	Tax Lot ▾	1	2	
<input checked="" type="checkbox"/>	Total Floor Area	Total Floor Area	Tax Lot ▾	292029	390289	1234560
<input checked="" type="checkbox"/>	Owner	Owner	Tax Lot ▾	Howard Mills	Ron Willard	Mary Rowan
<input checked="" type="checkbox"/>	Owner State	Owner State	Tax Lot ▾	CA	MI	CA
<input checked="" type="checkbox"/>	Owner Postal Code	Owner Zip	Tax Lot ▾	94530	45678	94530
<input checked="" type="checkbox"/>	Year Built	Year Built	Tax Lot ▾	1975	1855	1942

Some of the field names are changed from the default program suggestions



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 Cleansing Results** to see
data errors (see next page)

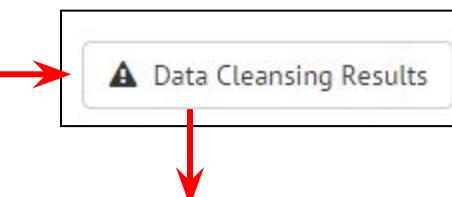
[Back to Mapping](#) [Data Cleansing Results](#)[Save Mappings](#)[View by Tax Lot](#) [9 Tax Lots](#)

Address Line 1 (Tax Lot)	City (Tax Lot)	Owner	Year Built	Owner Postal Code	Jurisdiction	Total Floor Area
050 Willow Ave SE	Rust	Howard Mills	1975	94530	1552813	292029
2655 Welstone Ave NE	Rust	Ron Willard	1855	45678	11160509	390289
93029 Wellington Blvd	Rust	Mary Rowan	1942	94530	13334485	1234560
94000 Wellington Blvd	Rust	Frank Stone	1933	21564	23810533	5312
11 Ninth Street	Rust	Dave Franklin	1961	31625	24651456	45135
525 Elm Street	Rust	Susan Anthony	1955	94530	33366125	954652
530 Elm Street	Rust	Heidi Folk	1965	94530	33366148	154623
521 Elm Street	Rust	Buildings LLC	2002	94530	33366555	15213
39929 Ranch 99 Road	Rust	Ward Thatcher	1948	91235	55039309	331235

[Back to Mapping](#)[Save Mappings](#)

Mapping – Review – Data Cleansing

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



Data Cleansing Results

File Name: covered-buildings-sample.csv

Date Uploaded: Invalid date

ADDRESS LINE 1	PM PROPERTY ID	TAX LOT ID	CUSTOM ID	FIELD	ERROR MESSAGE
Address Line 1	PM Property ID	Tax Lot ID	Custom ID	Field	Error Message
44871 SW Orange Highway	--	10103572BC	--	Year Built	Value [0] < 1700
158538 S Monroe Court	--	101104DF66	--	Year Built	Value [0] < 1700
97036 N Eisenhower Road	--	101041BD08	--	Year Built	Value [0] < 1700
98737 NW Van Buren Court	--	10101528FC	--	Year Built	Value [0] < 1700
143991 SW Harrison Way	--	101013F4F9	--	Year Built	Value [0] < 1700
92910 NW Papaya Court	--	101105F905	--	Year Built	Value [0] < 1700
236009 SW Oak Road	--	10102C424E	--	Year Built	Value [0] < 1700
99348 NE Locust Street	--	101047EF71	--	Year Built	Value [0] < 1700

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

Export

Close

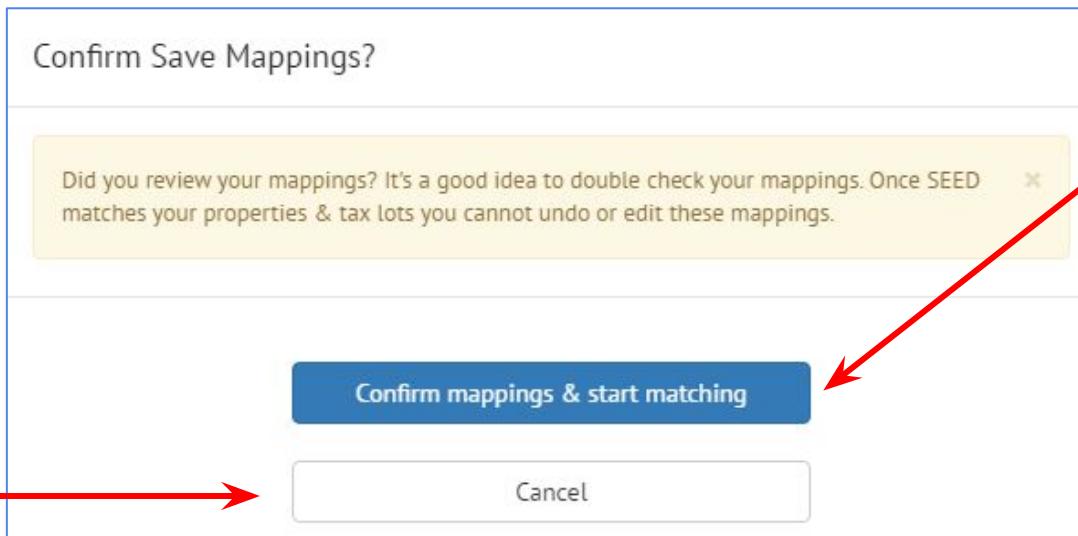
Data Cleansing Results.csv

Click Close to return to the Data Mapping Screen

Mapping – Confirm and Start Matching

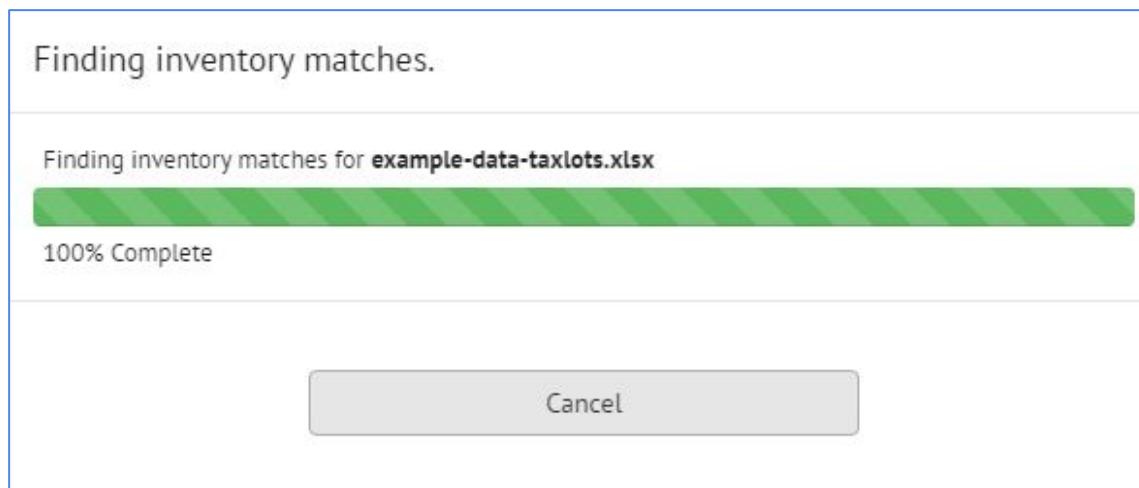
Save Mappings

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)



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

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

Matching - View Results / Add a File

Load More Data

SEED could not locate any non-duplicate matches and found **0 duplicates**. Would you like to add another file?

The program reports on any matches that it found. In this example, there were no matches within the Covered Buildings data being imported.

Add another file

View my buildings

Cancel

Click **Add another file** to upload ENERGY STAR Portfolio Manager data (or other data) and you can then add more data to match to the records that were just created

Upload your data.

Time Period:

2016 Compliance Cycle

Upload a Spreadsheet

Upload Portfolio Manager Data

Upload Green Button Data

Cycle: 2017 Compliance

[View by Property](#) [View by Tax Lot](#)

	Jurisdiction Tax Lot ID	Address Line 1 (Tax Lot)	City (Tax Lot)	Gross Floor Area	Owner	Number Properties
✓	11160509	2655 Welstone Ave NE	Rust	390289	Ron Willard	2
✓	55039309	39929 Ranch 99 Road	Rust	331235	Ward Thatcher	
✓	13334485	93029 Wellington Blvd	Rust	1234560	Mary Rowan	
✓	1552813	050 Willow Ave SE	Rust	292029	Howard Mills	1
✓	33366125	525 Elm Street	Rust	954652	Susan Anthony	
✓	33366555	521 Elm Street	Rust	15213	Buildings LLC	
✓	23810533	94000 Wellington Blvd	Rust	5312	Frank Stone	
✓	33366148	530 Elm Street	Rust	154623	Heidi Folk	
✓	24651456	11 Ninth Street	Rust	45135	Dave Franklin	5

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

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

Upload - Property / Portfolio Manager

ENERGY STAR Portfolio Manager data

Upload your data.

Time Period: 2016 Compliance Cycle

Upload a Spreadsheet

Upload Portfolio Manager Data

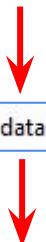
Upload Green Button Data



To upload Portfolio Manager data:

- Select the appropriate Cycle
- Click the **Upload Portfolio Manager data** button

Browse to the appropriate file to upload



example-data-properties.xlsx

Upload your data.

Uploading example-data-properties.xlsx

45% saving data



Successful upload!

example-data-properties.xlsx has been uploaded to 2017 Compliance.

Continue to data mapping

Cancel

Click
Continue to data mapping
(See next page)

Mapping - Property / Portfolio Manager

Property / Building / Portfolio Manager

Custom ID 1

- Matching field
- Use for any unique building ID or other ID matching between data

PM Property ID

- Matching field
- 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
- Map to address field to match records on address; otherwise, map to another name (including keeping the original name)

Lot Number

- Map to a field containing Tax Lot / Parcel ID data to set up the relationship between Tax Lot and Property; it can contain multiple IDs separated by comma or semicolon

SEED example-data-properties.xlsx

Mapped Fields		Set all fields to:	Property ▾
SEED HEADER	DATA FILE HEADER	INVENTORY TYPE	ROW 1
Custom Id 1	Unique Building ID	Property ▾	1
Pm Property Id	Property ID	Property ▾	2264
Pm Parent Property Id	Parent Property ID	Property ▾	
Property Name	Property Name	Property ▾	University Inn
Address Line 1	Address 1	Property ▾	50 Willow Ave SE
City	City	Property ▾	Rust
Lot Number	Tax Lot ID	Property ▾	1552813
Property Type	Property Type	Property ▾	Hotel

Mapping Review - Property / Portfolio Manager

ENERGY STAR
Portfolio Manager
data

Click Data Cleansing results button to see if
there are any errors or warnings.

Click Save Mappings if mapping is correct

The screenshot shows a web-based application for managing property mappings. At the top, there's a header with a 'DATA' button and a '0' notification. The main title is 'Mapping Review - Property / Portfolio Manager'. On the left, red text indicates the application is for 'ENERGY STAR Portfolio Manager data'. In the center, there's a table titled 'View by Property' showing mappings between PM Property ID, Associated Building Tax ID, Address Line 1, City, Property Name, and PM Parent Property ID. Below the table is a 'Data Cleansing Results' section with a table showing file details and a list of errors. Red arrows point from the text instructions to the 'Data Cleansing Results' button in the header and to the error table.

Back to Mapping

Data Cleansing Results

Save Mappings

12 Properties

PM Property ID	Associated Building Tax ID	Address Line 1 (Property)	City (Property)	Property Name	PM Parent Property ID
1311523	24651456	11 Ninth Street	Rust	Lucky University	1311523
1311524	24651456	12 Ninth Street	Rust	Grange Hall	1311523
1311525	24651456	20 Tenth Street	Rust	Biology Hall	1311523
1311526	24651456	35 Tenth Street	Rust	Rowling Gym	1311523
1311527	13334485;23810533	93029 Wellington Blvd	Rust	East Computing Hall	1311523
1311528	13334485;23810533	93031 Wellington Blvd	Rust	International House	1311523
3020139	11160509	2655 Welstone Ave NE	Rust	Hilltop Condos	

Data Cleansing Results

File Name: example-data-properties.xlsx

Date Uploaded: January 31st 2017, 1:34:19 PM -08:00

ADDRESS LINE 1	PM PROPERTY ID	TAX LOT ID	CUSTOM ID	FIELD	ERROR MESSAGE
Address Line 1	PM Property ID	Tax Lot ID	Custom ID	Field	Error Message
2700 Welstone Ave NE	1154623	--	--	Site EUI	Site EUI [1202.0] > 1000.0
2655 Welstone Ave NE	3020139	--	--	Energy Star Score	Energy Star Score [1] < 10.0
521 Elm Street	5233255	--	--	Site EUI	Site EUI [1358.0] > 1000.0

Mapping – Confirm 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 buildings you can not undo or edit these mappings.

You have one more chance to review the mapping

Confirm mappings & start matching

Cancel

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

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

Finding inventory matches.

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

100% Complete

Cancel

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**.

Main Screen - List Views

- View by Cycles
- View by Property and View by Tax Lot tabs

SEED PLATFORM™

Cycle: 2013 Calendar Year ▾

Properties

Properties List List Settings Reports

Actions ▾ Filter by label: Add a label Clear Labels

Cycle: 2016 Calendar Year ▾

Two tabs

- Property
- Tax Lots

Click + to see related records

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

Click on i to go to Detailed record view

Number of Property records for this cycle

12 Properties

	PMI Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Property)	Property Type	ENERGY STAR Score	Site EUI
<input checked="" type="checkbox"/>	2264	1552813	50 Willow Ave SE	Hotel	75	125
<input checked="" type="checkbox"/>	1154623	11160509	2700 Welstone Ave NE	Retail	63	1202
<input checked="" type="checkbox"/>	1311523	24651456	11 Ninth Street	College/University		
<input checked="" type="checkbox"/>	1311524	24651456	12 Ninth Street	Performing Arts	77	219
<input checked="" type="checkbox"/>	1311525	24651456	20 Tenth Street	Laboratory	43	84
<input checked="" type="checkbox"/>	1311526	24651456	35 Tenth Street	Fitness Center/Health ...	59	72

Property & Tax Lots - List View

View by Property

For a Cycle

Data grouped by PM Property ID

Shows associated Tax Lots

View by Property							12 Properties	
	PM Property ID	Jurisdiction Tax Lot ID	Address Line 1 (Property)	Property Type	ENERGY STAR Score	Site El		
[+]	2264	1552813	50 Willow Ave SE	Hotel	75	125		
[+]	5233255	33366148; 33366125; 33366555	521 Elm Street	K-12 School	55	1358		
		33366148						
		33366125						
		33366555						
[+]	3020139	11160509	2655 Welstone Ave NE	Multifamily Housing	1	652.3		

View by Tax Lot

For a Cycle

Data grouped by Tax Lot ID

Shows associated Properties

View by Tax Lot						9 Tax Lot	
	Jurisdiction Tax Lot ID	PM Property ID	Address Line 1 (Tax Lot)	Address Line 1 (Property)			City (Tax Lot)
[+]	33366148	5233255	530 Elm Street	521 Elm Street			Rust
[+]	23810533	1311528; 1311527	94000 Wellington Blvd	93031 Wellington Blvd; 93029 Wellington Blvd			Rust
		1311528		93031 Wellington Blvd			
		1311527		93029 Wellington Blvd			
[+]	33366555	5233255	521 Elm Street	521 Elm Street			Rust
[+]	33366125	5233255	525 Elm Street	521 Elm Street			Rust
[+]	1552813	2264	050 Willow Ave SE	50 Willow Ave SE			Rust

List Grid Functionality

Implemented a new UI Grid with a lot of functionality built in

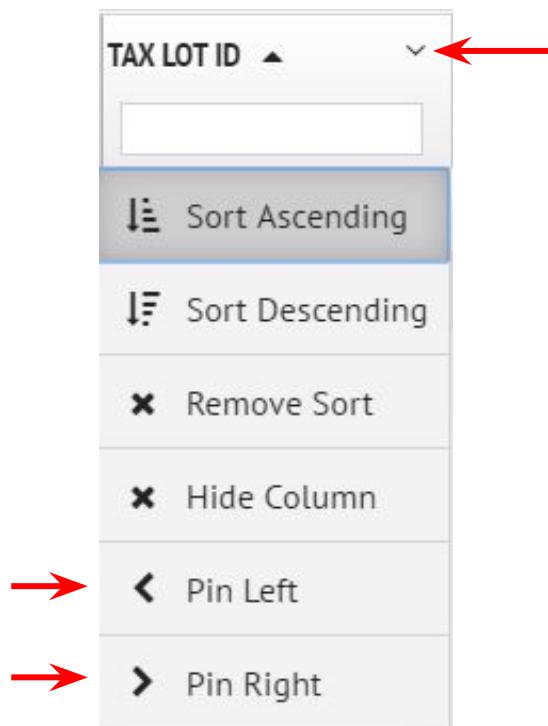
- **Filtering**
- **Sorting** -- click in the middle of the column header to see the small up and down arrows to sort ascending and descending; alternatively select the right menu arrow in the column to see the Sort Ascending, Sort Descending and Remove Sort options
- **Selecting fields to view** -- 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 (see following pages for details)
- **Field order by dragging columns** -- click in the middle of a column header and drag it right or left to place it the desired order
- **Pinning columns** -- click on the right menu arrow in an individual column to see the Pin Left, Pin Right and Unpin options for that column (see following pages for details)
- **Resizing columns** - click on the right hand side of the column header and drag it 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”
 - Depending on performance, we may add in the user option to have the program have “pages” of data

List Grid Functionality

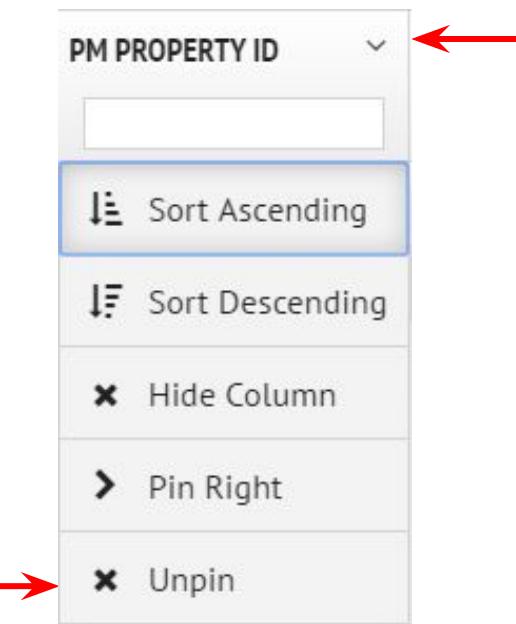
Pinning columns left and right

- 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 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 'Column Order/Visibility' settings in the List Settings interface. The interface shows a list of available columns and a grid for selecting their order. The 'PM Property ID' column is selected and has a blue pin icon indicating it is pinned to the right. Other columns like 'Tax Lot ID' and 'Property Address 1' are also listed.

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

List View - Settings

- Displays all possible fields between Tax Lot and Property
- Tax Lot and Property Settings can be different
- Tags fields that are in table NOT being viewed
- Changes made here are reflected in the View by Tax Lot tab, and vice versa
- Field display and order are on one screen
- Changes are saved automatically

Property List Settings

Properties List List Settings Reports

Tax Lot List Settings

Tax Lots List List Settings Reports

Column Order/Visibility

Add Shared Tax Lots.

Include in your tax lots list all tax lots shared with you.

There are 917 columns of data available to you.

Select columns from the list below to make them appear in your Tax Lots 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
<input checked="" type="checkbox"/>	Tax Lot ID
<input checked="" type="checkbox"/>	PM Property ID property
<input checked="" type="checkbox"/>	Tax Lot Address Line 1
<input checked="" type="checkbox"/>	Property Address 1 property
<input checked="" type="checkbox"/>	Property Name property
<input checked="" type="checkbox"/>	Primary/Secondary property
<input checked="" type="checkbox"/>	Primary Tax Lot ID
<input checked="" type="checkbox"/>	Associated TaxLot IDs property
<input checked="" type="checkbox"/>	Associated Building Tax Lot ID
<input checked="" type="checkbox"/>	Tax Lot Address Line 2
<input checked="" type="checkbox"/>	Tax Lot City

Enter values to search the list of fields →

Shows which fields are pinned left →

Can set more fields to be pinned left →

Reset defaults makes only the Tax Lot fields selected →

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

Reset defaults Clear all filters

List View – List Settings – 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
	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

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
✓	Site EUI
✓	Property Type
✓	Year Ending
✓	Custom ID 1
✓	Address Line 1 (Tax Lot) tax lot
✓	PM Release Date

Type into the input box to filter the list of fields

List View – Reports

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**

The pulldown list shows the Cycles for the organization

The screenshot shows the 'Inventory Reports' section of a software application. At the top, there are three tabs: 'Properties List', 'List Settings', and 'Reports'. A red arrow points to the 'Reports' tab. Below the tabs, there are two dropdown menus for 'From first date of:' and 'Until last date of:', both set to '2012 Compliance Year'. To the right of these are dropdowns for 'X Axis:' (set to 'Site EUI') and 'Y Axis:' (set to 'Gross Floor Area'). A large blue button labeled 'Update Charts' is positioned to the right of the Y-axis dropdown. Red annotations provide instructions: one points to the 'Reports' tab with the text 'From either the Properties or Tax Lots Inventory List view click on Reports'; another points to the date range dropdowns with 'Date ranges for reporting based on Cycles'; a third points to the 'Update Charts' button with 'Click Update Charts'; a fourth points to the X-axis dropdown with 'X Axis (Energy data)'; a fifth points to the Y-axis dropdown with 'Y Axis (Building Characteristic)'; and a sixth points to the X-axis dropdown with 'The pulldown list shows the Cycles for the organization'. Below the main controls are two dropdown menus. The 'X Axis:' dropdown menu shows 'Site EUI', 'Source EUI', 'Weather Norm. Site EUI', 'Weather Norm. Source EUI', and 'Energy Star Score'. The 'Y Axis:' dropdown menu shows 'Gross Floor Area', 'Building Classification', and 'Year Built'.

List View – Reports

Scatter Plot with all buildings

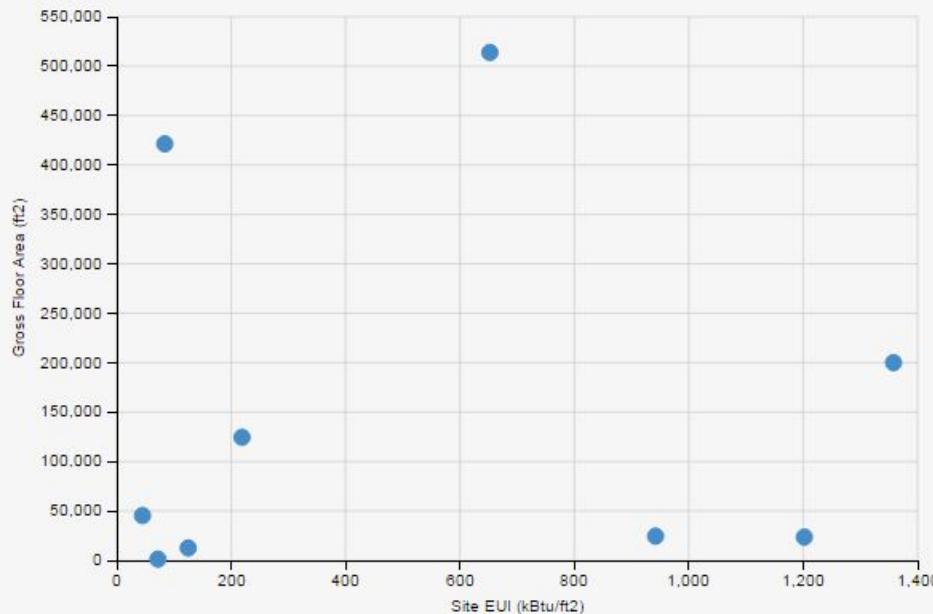
Bar Graph with Median Values

Inventory Reports

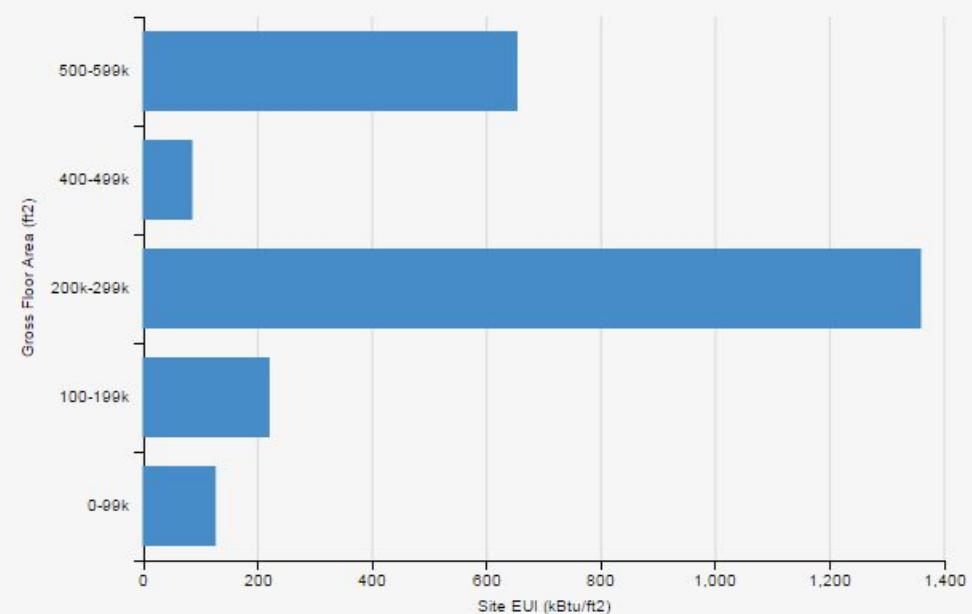
[Properties List](#) [List Settings](#) [Reports](#)
[Property Reports](#)

From first date of: 2017 Compliance Until last date of: 2017 Compliance X Axis: Site EUI Y Axis: Gross Floor Area [Update Charts](#)

Site Energy Use Intensity vs. Gross Floor Area



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



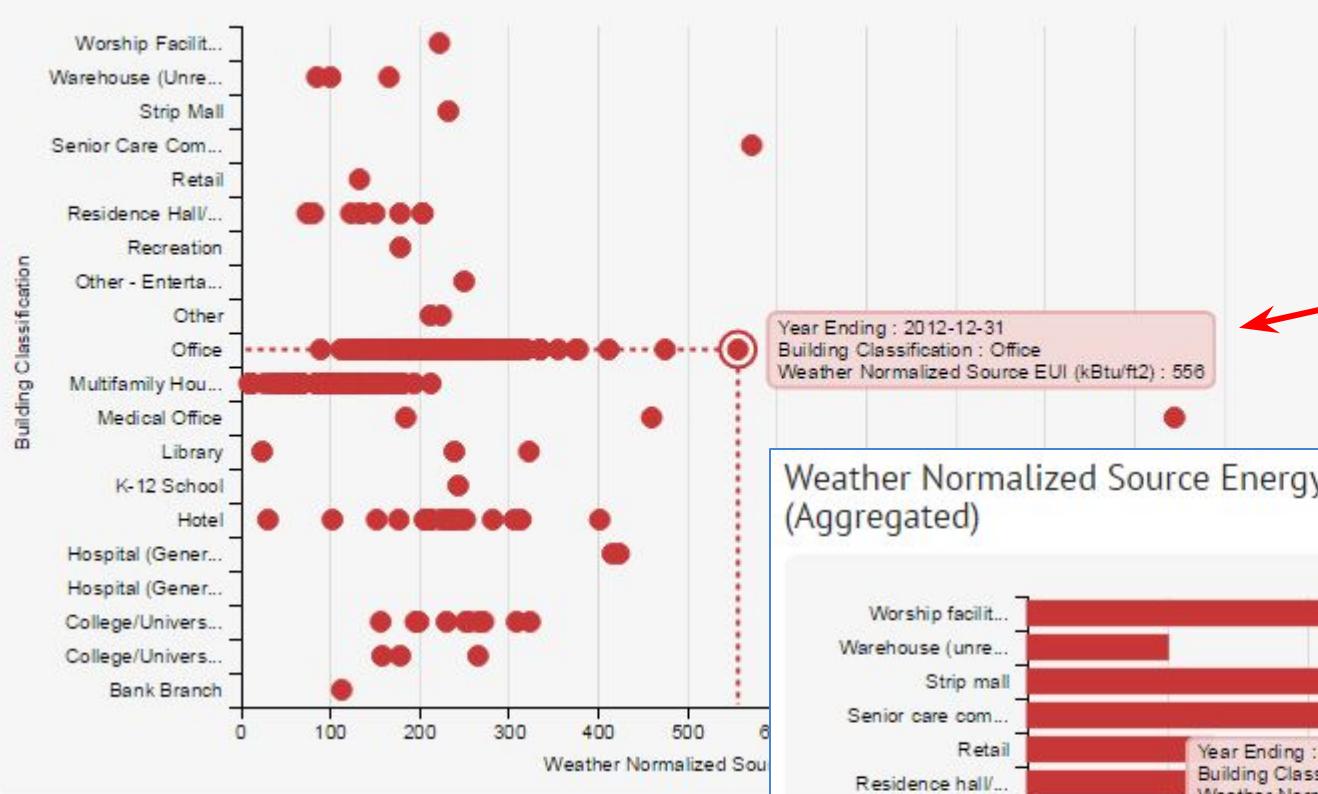
Year Ending	Properties with Data	Total Properties
2017	9	12

Program reports # data points
actually used for graphs

Year Ending	Properties with Data	Total Properties
2017	9	12

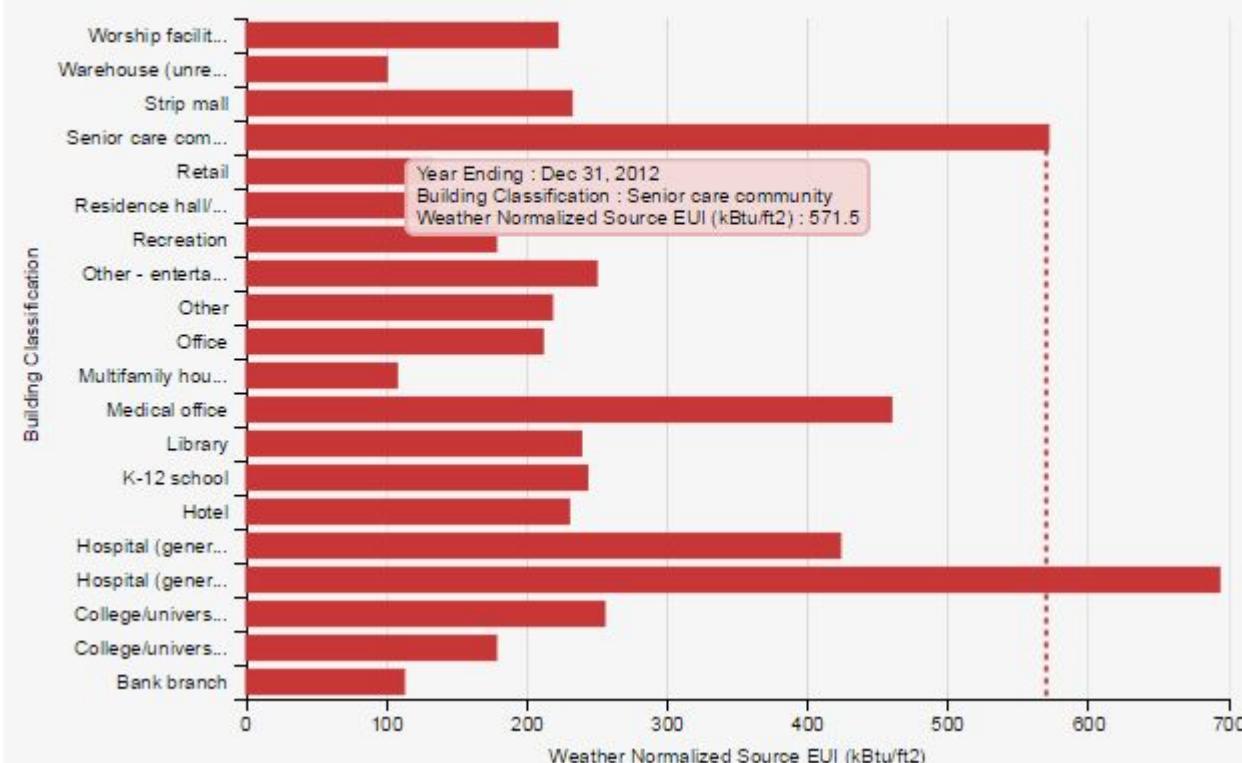
List View – Reports

Weather Normalized Source Energy Use Intensity vs. Building Classification



Mouse over point to display exact data for that point

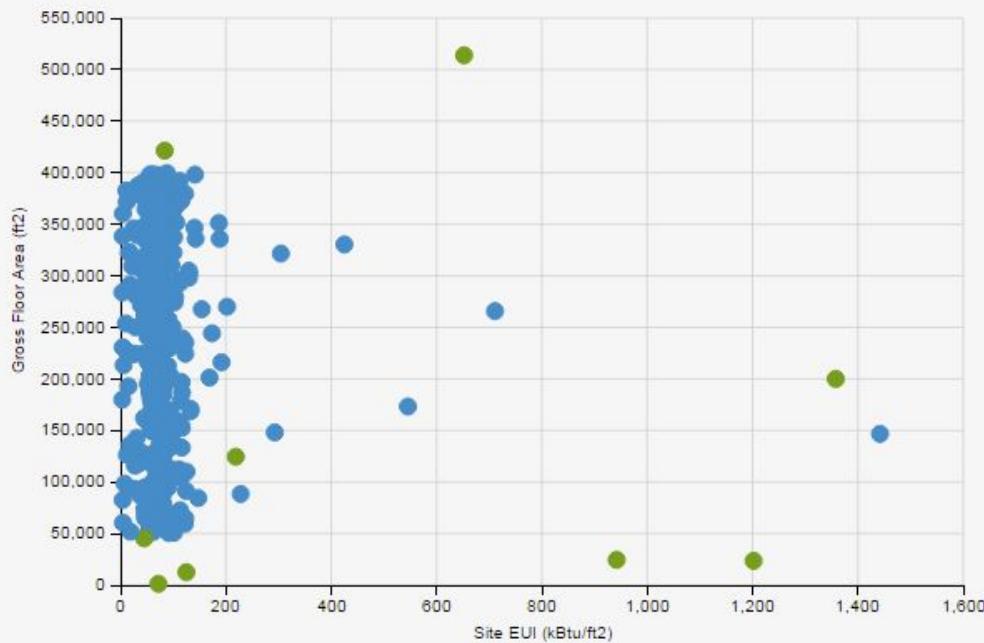
Weather Normalized Source Energy Use Intensity vs. Building Classification (Aggregated)



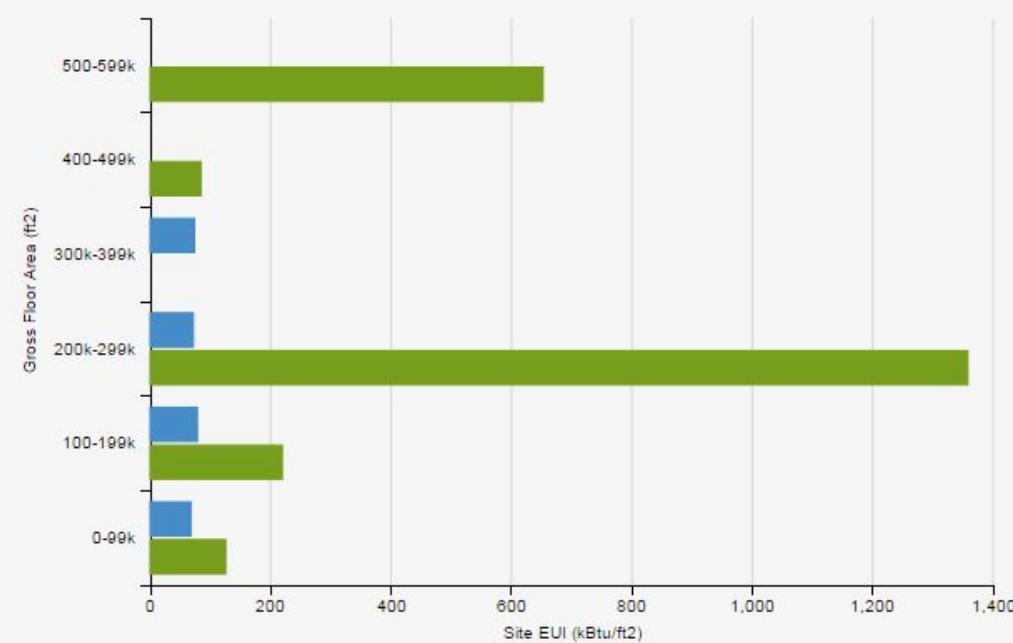
List View – Reports - Multiple Years of Data

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

Site Energy Use Intensity vs. Gross Floor Area



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

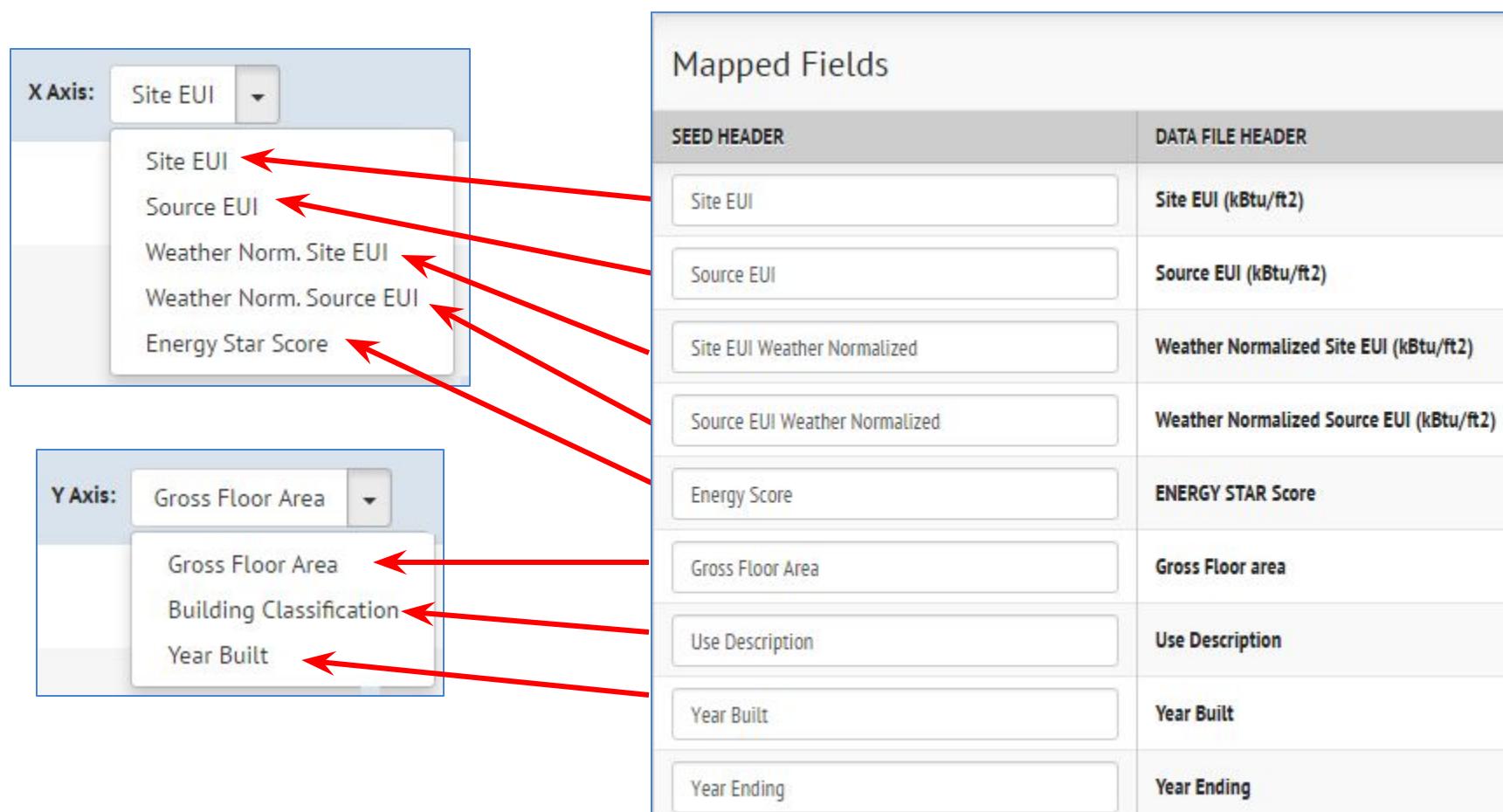


Year Ending	Properties with Data	Total Properties
● 2016	392	512
● 2017	9	12

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

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)



Labels - List View

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

Tax L

Tax Lots List List

Actions ▾ Filter by label: Add a label

Delete Selected Export Selected Add/Remove Labels

View by Property View by Tax Lot

	Tax Lot ID	PM Property ID	Tax L
<input checked="" type="checkbox"/>	55039309		3992
<input checked="" type="checkbox"/>	33366555	5233255	521 Elm Street
<input checked="" type="checkbox"/>	33366148	5233255	530 Elm Street
<input checked="" type="checkbox"/>	33366125	5233255	525 Elm Street
<input checked="" type="checkbox"/>	24651456	1311524; 1311526; 1311525; 1311523	11 Ninth Street

Add/Remove Labels

Create new label

Label Name

gray ▾

Create label

Add or remove labels from selected tax lots

Lucky University

Add

Missing Data

Add

No Energy Star Score

Add

No EUI

Add

Non-Residential

Add

Questionable Report

Add

Residential

Add

Industrial

Add

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

Done

Cancel

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. From that screen, either
 - Make a new label in the **Create new label** box (specify the name, color, and click **Create Label** button)
 - Or
 - Select an existing label by clicking the **Add** button to the right of the label
7. Make sure the **Add** button is highlighted in blue for the label you want to apply
8. Click the **Done** button

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)

The screenshot shows the EnergyStar software interface. At the top, there's a toolbar with a 'Filter by label:' dropdown set to 'Add a label'. Below it is a table with columns: PM Property ID, Site EUI, and Property Type. A filter is applied for 'Property Type: college'. The first two rows in the table have checkboxes in the first column checked, indicating they are selected.

A context menu is open at the top center, with the following options: Actions (highlighted with a blue circle), Delete Selected, Export Selected, Add/Remove Labels (highlighted with a blue circle), View by Property, and View by Tax Lot.

The main area shows the 'Add/Remove Labels' dialog box. It has a 'Create new label' input field containing 'Condo' and a color dropdown set to 'gray'. Below it is a list of labels categorized by color: High EUI (green, red), Low Energy STAR score (gray, orange), Low EUI (light blue), Missing Data (blue). To the right, there are 'Add' buttons for each category. A specific 'Add' button for the 'gray' label under 'High EUI' is highlighted with a blue circle.

At the bottom of the dialog, there's a note: 'A 'Remove' button is shown for tags that are already applied to one or more buildings in the current selection'. Finally, at the very bottom right are 'Done' and 'Cancel' buttons.

Detail View - Property & Tax Lot

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

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

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

The screenshot shows the "Property Detail" view for a property located at 521 Elm Street. The view includes the following elements:

- Header:** Properties, Property Detail (selected), Settings. A red arrow points to the Settings tab with the label "Controls field display and order".
- Property Address:** Property : 521 Elm Street
- Buttons:** Add/Remove Labels (highlighted with a red arrow), Labels: Compliant (highlighted with a red arrow), Change of Ownership, Edit (with a red arrow pointing to it).
- Table Headers:** FIELD, CURRENT VALUE
- Table Data:**

PM Property ID	5233255
Jurisdiction Property ID	5
Address Line 1 (Property)	521 Elm Street
City (Property)	Rust
Property Name	Montessori Day School
PM Parent Property ID	
Gross Floor Area	200000
ENERGY STAR Score	55
Site EUI	1358
Property Type	K-12 School
Year Ending	2015-12-31
Owner Telephone	213-555-4368
- Labels:** Labels assigned to the record (highlighted with a red arrow).
- Cycle:** Cycle: 2016 Calendar Year (highlighted with a red arrow).
- Related Tax Lots:** Related Tax Lots table showing three entries:

TAX LOT ID	ADDRESS LINE 1
33366148	530 Elm Street
33366555	521 Elm Street
33366125	525 Elm Street
- Links:** Links to access related Tax Lot detail views (highlighted with a red arrow).

Detail View - Settings - Property & Tax Lot

Click Settings from either Property or Tax Lot Detail 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

Property Detail Settings

Property Detail Settings

Column Order/Visibility

There are 41 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
PM Property ID
Property / Building ID
Property Address 1
Property City
Property Name
PM Parent Property ID
Property Floor Area
Property Type
ENERGY STAR Score
Site EUI (kBtu/sf-yr)
Property Notes
Owner
Owner Email
Owner Telephone
Number of Buildings
Year Built
PM Release Date
PM Generation Date
Property Conditioned Floor Area

Enter values to search the list of fields

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

Drag fields to set the order

Detail View - Edit - Property & Tax Lot

[Properties](#)

Property Detail

[Property Detail](#) [Settings](#)

Property : 2700 Welstone Ave NE

[Save Changes](#)

[Cancel](#)

[Add/Remove Labels](#)

Labels: (no labels applied)

Cycle: 2017 Compliance

FIELD

PM Property ID

CURRENT VALUE

1154623

Jurisdiction Property ID

Associated TaxLot IDs

Associated Building Tax Lot ID

11160509

Address Line 1 (Property)

2700 Welstone Ave NE

City (Property)

Rust

Property Name

Hilltop Retail

Campus

PM Parent Property ID

Gross Floor Area

23543

Use Description

ENERGY STAR Score

63

Site EUI

1202

Property Notes

Case B-1: Multiple (3) Properties, 1 Tax Lot

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

 When you have finished editing a record, click the **Save Changes** button.

To Edit Data:

- click on the **Current Value** data field and edit it directly.



Sorting

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



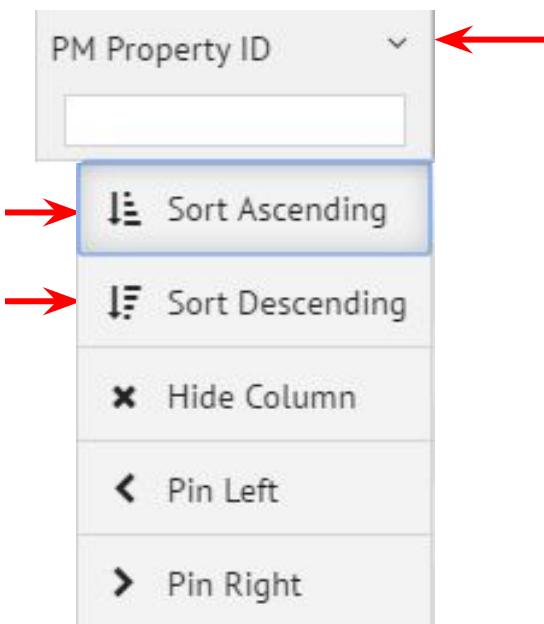
Ascending



Descending

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



Filtering

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

Text fields:

- “” 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 **CONDO**

Use Description
CONDO
CONDO
COMMERCIAL CONDO
COMMERCIAL CONDO
CONDO

Use Description
“ CONDO ”
CONDO
CONDO
CONDO
CONDO

Numeric fields:

- The filter field is now a single field that can parse a number of expression formats.
- An expression is one of the following operators.
- Operators: =, ==, !=, !, <>, <, <=, >, >=
- Followed by either a numeric value or the string 'null'
- null can only be used with the equality or inequality operators.
- Multiple expressions should be separated by commas.

Examples:

- >100 is greater than 100
- >1984,<1990 is greater than 1984 and less than 1990
- !null, !=0 is not null and not equal to 0

ENERGY STAR Score	▼
!null,!0	×

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

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

Filtering

SEED allows expressions in the filter boxes for more complex filtering

	Numeric Fields		Text Fields	
	Expression	Example	Expression	Example
Equal to	= == or just type the value	100 =100	value Type the value to filter for records containing that value	Condo Returns any records with condo in any part of the text field, <ul style="list-style-type: none">• commercial condo• residential condo
			"value" Surround the value with quotes for an exact match including case	"Commerical Condo" Returns only records with Commercial Condo in the text file
Not equal to	!= ! <>	!0 Returns records with data not equal to zero		
Less than	<	<1990 less than 1990		
Less than or equal to	<=	<=75 Less than or equal to 75		
Greater than	>	>100 greater than 100		
Greater than or equal to	>=			
Null	=null ==null		"" Two double quotes without spaces	
Not null	!=null !null <>null		!"" Two double quotes preceded by an exclamation point (for "not")	
Combined expressions		!null, !0 Returns data that has data, not including values of zero. >=500,<1000 Returns data greater than or equal to 500 and less than 1000		

Filtering

Filter by Label shows only labels that are applied to records

Numeric fields can have expressions

Gross Floor Area
>=25000,<100000
51764
51843
59188
61650
64123
67425
68177
71068
73993
78080
78810
80284

Properties

Properties List List Settings Reports

Actions ▾ Filter by Label: Add a label

Cycle: 2016 Compliance Year

No Energy Star Score
No EUI

View by Property View by Tax Lot

PM Property ID	Tax Lot ID	Property Address 1	ENERGY STAR Score
2264	1552813	50 Willow Ave SE	75
1154623	11160509	2700 Welstone Ave NE	63

Filter by Label only shows labels applied to records being viewed

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

Filtering Using Labels

The Inventory List view (Property and Tax Lot) can be filtered using Labels

If a label is used as a filter, then all the records with that label will be displayed. Multiple labels can be applied to the filter box.

In this example, buildings with a blank ENERGY STAR score have been labeled, and Condos have also been labeled.

Therefore, filtering on the two labels

- Low / No ENERGY STAR Score
- Condo

results in 22 buildings being displayed

Clicking on the “information” icon

Displays the Tax Lot Detail view which shows all the labels associated with that record.

Tax Lots									
Tax Lots List List Settings Reports									
Actions <input type="button" value="▼"/> Filter by label: <input checked="" type="button" value="Condo"/> <input checked="" type="button" value="Low / No ENERGY STAR Score"/> <input type="button" value="Add a label"/> <input type="button" value="Clear Labels"/>									
Cycle: <input style="width: 150px;" type="button" value="2016 Calendar Year"/>									
<input type="button" value="View by Property"/>		<input type="button" value="View by Tax Lot"/>		<input type="button" value="22 Tax Lots"/>					
		Jurisdiction Tax Lot ID	Use Description	Address Line 1 (Tax Lot)	Gross Floor Area	Site EUI	Year Built	ENERGY STAR Score	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10103/9971f	CONDO	110271 S Tyler Lane	284692	75.6	1991		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10107/a1bc5	CONDO	174743 SW True High...	111677		2010		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10104/af3b8	CONDO	217490 S Bush Way	159512		2010		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10104/fba7a	CONDO	76360 SE Spruce Court	360367	4.6	1982		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10108/e426c	CONDO	154432 SW Apple Loop	392035		1974		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10108/67de8	CONDO	142115 W Pineapple W...	230741	4.1	1964		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10101/f67f2	CONDO	192896 SE Peach Court	327974		1992		

Cycle: 2016 Calendar Year

Tax Lots		Tax Lot Detail	Settings						
 Tax Lot : 110271 S Tyler Lane									
<input type="button" value="Add/Remove Labels"/> Labels:									
<input checked="" type="button" value="Condo"/> <input checked="" type="button" value="Low / No ENERGY STAR Score"/>									
<table border="1"> <thead> <tr> <th>FIELD</th><th>CURRENT VALUE</th></tr> </thead> <tbody> <tr> <td>Jurisdiction Tax Lot ID</td><td>10103/9971f</td></tr> <tr> <td>Address Line 1 (Tax Lot)</td><td>110271 S Tyler Lane</td></tr> </tbody> </table>			FIELD	CURRENT VALUE	Jurisdiction Tax Lot ID	10103/9971f	Address Line 1 (Tax Lot)	110271 S Tyler Lane	
FIELD	CURRENT VALUE								
Jurisdiction Tax Lot ID	10103/9971f								
Address Line 1 (Tax Lot)	110271 S Tyler Lane								



Exporting Data

Actions ▾ Filter by label: Add a label

Delete Selected Export Selected Add/Remove Labels

View by Property **View by Tax Lot**

	PM Property ID	Tax Lot ID
<input checked="" type="checkbox"/>	3637888	884246680
<input checked="" type="checkbox"/>	2436917	883720500

Export your Properties and Tax Lots

Export Name: Problem records

CSV XLS

Cancel **Export**

Exports all the data visible in the Inventory list in “expanded” form
(if there is related data between Property and Tax Lots)

	A	B	C	D	E
1	PM Property ID	Jurisdiction Property ID		Property Jurisdiction Tax Lot ID	Notes Address Line 1 (Property) Address Line 1 (Tax Lot)
2	1311527		9	13334485; 23810533	Case D: Ca 93029 Wellington Blvd 93029 Wellington Blvd; 94000 Wellington Blvd
3				13334485	93029 Wellington Blvd
4				23810533	94000 Wellington Blvd
5	4828379		3	11160509	Case B-1: 2660 Welstone Ave NE 2655 Welstone Ave NE
6				11160509	2655 Welstone Ave NE

Collapsed record associated data in one line separated by semicolon

Associated records, one line per record

Organizations

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

Organizations				
Organizations I Manage				
ORGANIZATION				
LBNL 20				Number of records for Properties and Tax Lots for each Cycle , by Organization
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

- SEED is structured to allow a Parent Organization along with Sub-Organizations

Organizations				
Organizations I Manage				
ORGANIZATION				
lbnl				There is a Parent Organization
Sub-Organizations				
LBL 1				
LBL 2				
LBL 3				
LBL 4				

Role can be:

- Owner
- Member
- Viewer

Organizations

The screenshot shows the 'Organizations' interface with two main sections:

- Organizations I Manage:** Shows an organization named "LBNL 20".
- Organizations I Belong To:** Shows an organization named "LBNL 20".

A red arrow points from the "LBNL 20" entry in both sections to the "LBNL 20" organization name in the main view below. Another red arrow points to the "Organization Name" link in the main view.

Organization Name

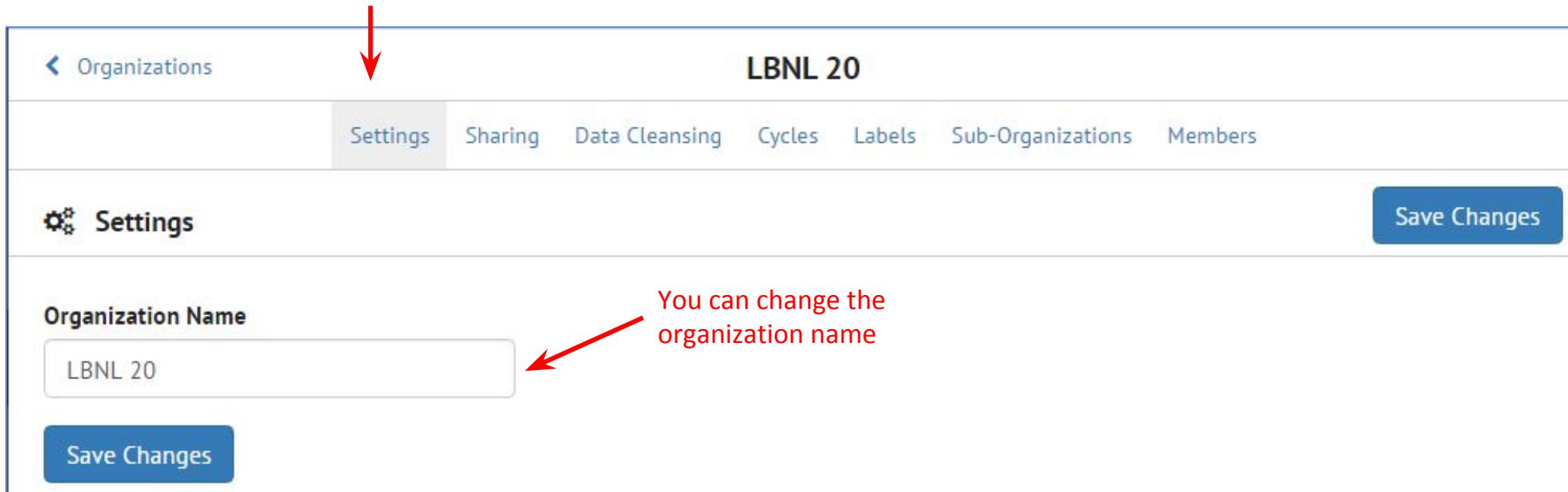
LBNL 20

- The links from this view are
 - **Settings:** The Admin screen for organization settings
 - **Sharing:** The Admin screen for managing how data is shared
 - **Data Cleansing:** The Admin screen for managing Data Cleansing settings
 - **Cycles:** The Admin screen for managing Cycles
 - **Labels:** The Admin screen for managing Labels
 - **Sub-Organizations:** A list of all sub-organizations related to this organization
 - **Members:** A list of all members of this organization

Settings

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

Click on the
Settings link



The screenshot shows the 'Settings' tab selected within the 'Organizations' section of a software interface. The organization name 'LBNL 20' is displayed prominently. A red arrow points from the text 'Click on the Settings link' down to the 'Settings' tab. Another red arrow points from the text 'You can change the organization name' to the 'Organization Name' input field, which contains the text 'LBNL 20'. A blue 'Save Changes' button is visible on both the top right and bottom right.

LBNL 20

◀ Organizations

Settings Sharing Data Cleansing Cycles Labels Sub-Organizations Members

⚙️ **Settings**

Organization Name

LBNL 20

You can change the organization name

Save Changes

Sharing

Organizations LBNL 20

Settings **Sharing** Data Cleansing Cycles Labels Sub-Organizations Members

Sharing Your Data

Save Changes

Click on the Sharing link

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		
INTERNAL	PUBLIC	FIELD NAME
<input type="checkbox"/>	<input type="checkbox"/>	Search field name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Recent Sale Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Release Date
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Site Eui
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Site Eui Weather Normalized
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Source Eui
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Source Eui Weather Normalized
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Space Alerts
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	State
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Use Description
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Year Built
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Year Ending
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	gross_floor_area

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 #

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.

Data Cleansing Admin Page

Manage Data Cleansing (Validation) Rules

[Settings](#)[Sharing](#)[Data Cleansing](#)[Cycles](#)[Labels](#)[Sub-Organizations](#)[Members](#)

Data CleaningClick on the **Data Cleaning** link[Restore Defaults](#)[Save Changes](#)

In-Range Checking: Modifying Data Cleaning Rules

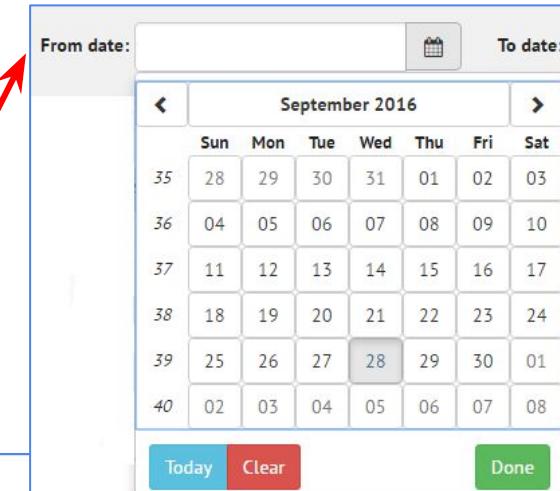
From the table below, select the rules that you want to: 1) enable/disable within your organization, and 2) modify the minimum/maximum values to validate against on file upload.

FIELD	MINIMUM	MAXIMUM	SEVERITY	UNITS
<input type="checkbox"/> Conditioned Floor Area	(no minimum)	7000000	Error	square feet
<input type="checkbox"/> Conditioned Floor Area	100	(no maximum)	Warning	square feet
<input checked="" type="checkbox"/> Energy Score	(no minimum)	100	Error	
<input checked="" type="checkbox"/> Energy Score	10	(no maximum)	Warning	
<input type="checkbox"/> Generation Date	01/01/1889	12/31/2020	Error	
<input checked="" type="checkbox"/> Gross Floor Area	100	7000000	Error	square feet
<input checked="" type="checkbox"/> Occupied Floor Area	100	7000000	Error	square feet
<input type="checkbox"/> Recent Sale Date	01/01/1889	12/31/2020	Error	
<input type="checkbox"/> Release Date	01/01/1889	12/31/2020	Error	
<input checked="" type="checkbox"/> Site Eui	(no minimum)	1000	Error	kBtu/sq. ft./year
<input checked="" type="checkbox"/> Site Eui	6	1000	Warning	kBtu/sq. ft./year

Manage Cycles

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

Click on the **Cycles** link



Settings Sharing Data Cleansing **Cycles** Labels Sub-Organizations Members

Create new cycle

Cycle Name

From date:



To date:



Create Cycle

Existing Cycles

NAME	FROM DATE	TO DATE	
2012 Calendar Year	01-01-2012	12-31-2012	<button>edit</button>
2013 Calendar Year	01-01-2013	12-31-2013	<button>edit</button>
2014 Calendar Year	01-01-2014	12-31-2014	<button>edit</button>
2015 Calendar Year	01-01-2015	12-31-2015	<button>edit</button>

Labels Admin Page

Click on the **Labels** link

Create new label Label Name gray ▾ Create label You can create new labels

Existing Labels

NAME	Actions
Call before March 1	edit X
Change of Ownership	edit X
College/University	edit X
Compliant 2015	edit X
Email	edit X
Exempted	edit X
Extension	edit X
High EUI	edit X
Low EUI	edit X

In this screen you can predefine 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

Organizations – Sub-Organizations

SEED PLATFORM™

LBNL 21 +

← Organizations Parent Organization → LBNL 21

Settings Sharing Data Cleansing Cycles Labels Sub-Organizations Members

The owner of a Parent Organization can create Sub-Organizations

Sub-Organizations Click on the Sub-Organizations link Create a new sub-organization

SUB-ORGANIZATION NAME	OWNER NAME	OWNER EMAIL
LBNL 211	Robin LBNL 211	rdmitchell+211@lbl.gov
LBNL 212	Robin Mitchell Robin LBNL 212	rdmitchell+21@lbl.gov rdmitchell+212@lbl.gov

Create a New Sub-Organization

Sub-Org Name:

Invite an Owner:

Note 1: Sub-organizations can not be deleted.
Note 2: Parent organization members are not automatically made members of sub-organizations.

Cancel Create New Sub-Organization

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)

Members

← Organizations LBNL 20

Settings Sharing Data Cleansing Cycles Labels Sub-Organizations **Members**

Members

member name member email member role

Robin LBNL 20 Invite a New Member owner

Click on the Members link

You can invite new members to your organization

Invite a new member

First Name: Enter first name

Last Name: Enter last name

Email Address: Enter Email Address

Role: Member
Owner (selected)
Viewer

Cancel Send Invite

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

The screenshot shows the 'Members' tab selected in the top navigation bar of an organization named 'LBNL 20'. A modal window titled 'Invite a New Member' is open, prompting for 'First Name', 'Last Name', 'Email Address', and 'Role'. The 'Role' dropdown menu lists 'Member', 'Owner' (which is highlighted in blue), and 'Viewer'. Below the form are 'Cancel' and 'Send Invite' buttons. Red annotations with arrows point to the 'Members' tab, the 'Send Invite' button, the 'Role' dropdown, and a descriptive text block on the right.

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 • 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
Make Projects		X In own Sub org	X In own Sub org	
Label records within Projects		X In own Sub org	X In own Sub org	

Swagger Interface to SEED RESTful APIs

The screenshot shows the Swagger UI for the SEED Platform. At the top, there's a navigation bar with 'SEED PLATFORM™' and a dropdown for 'LBNL 21'. Below it is a toolbar with 'swagger' (with a gear icon), a URL input field containing 'https://seedv2.lbl.gov/app/api/swagger/api-docs/', a 'api_key' input field, and 'Explore' and 'Django REST Swagger' buttons.

The main content area lists API endpoints under categories: 'cycles', 'data_files', and 'datasets'.

- cycles**:
 - Show/Hide | List Operations | Expand Operations | Raw
- data_files**:
 - Show/Hide | List Operations | Expand Operations | Raw
- datasets**:
 - Show/Hide | List Operations | Expand Operations | Raw

Under the 'datasets' category, three methods are listed:

- POST /api/v2/datasets/**: Creates a new empty dataset (ImportRecord)
- GET /api/v2/datasets/**: Retrieves all datasets for the users organization
- GET /api/v2/datasets/count/**: Retrieves the number of datasets for an org

Implementation Notes
Retrieves the number of datasets for an org.

Response Class
[Model](#) | Model Schema

```
DatasetCountResponse {  
    status (string): success or error,  
    datasets_count (integer): Number of datasets belonging to this org  
}
```

Response Content Type application/json ▾

Parameters

Parameter	Value	Description	Parameter Type	Data Type
organization_id	(required)	The organization_id	query	string

[Try it out!](#)

Contact

Contact

For SEED-Platform Users:

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

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

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

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

For direct help on a specific problem, please email:

SEED-Support@lists.lbl.gov

For SEED-Platform Developers:

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

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

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

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

About SEED Platform™

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

[More details](#)

Development Team:

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

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

Version

2.0.0.3daf0f8

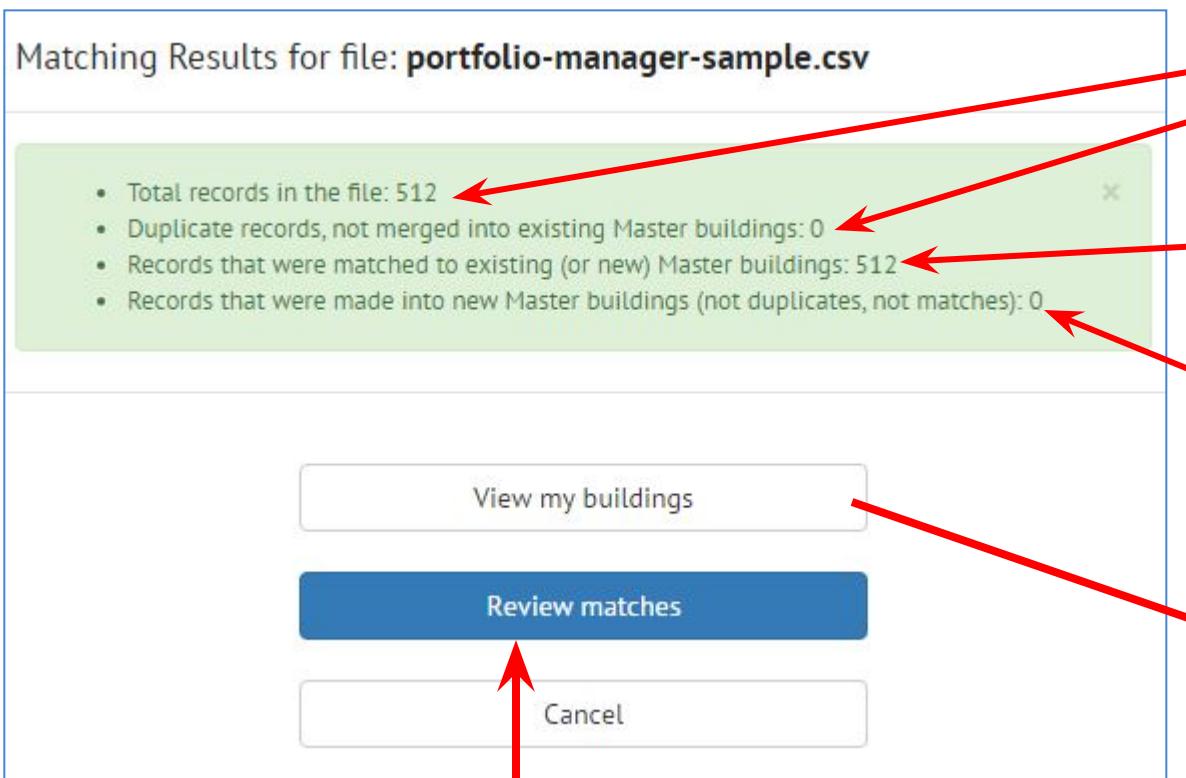
When reporting an issue, including the complete Version # is useful

Slides to update
later

Data Matching -- Results

Need to update this slide with latest code for hand matching and the results dialog box 1/31/2017

The program reports the results of the matching



Click the **Review Matches** button to go to the Matching *screen* (*see next page*) to see how the program matched the records between the existing buildings created from the **Tax Lot data** and the newly imported records from the **Portfolio Manager data set**

- Total records imported from the file
- Records that exactly matched between the existing buildings and the newly imported buildings – these are considered “duplicates” and are not imported
- Records that the program was able to match between the existing buildings and the newly imported buildings on the matching field(s) – in this case they matched 1:1, so 512 records matched on **Address Line 1**
- Records from the newly imported file that could not be matched to an existing building, and so are made into new building records.

Click **View Properties** to see the Inventory list

After a data file has been mapped and matched, the program adds those records to Inventory list.

512 Buildings						
		Buildings List		List Settings		
Building Actions ▾						
	ADDRESS LINE 1	OWNER	PREMISES GROSS FLOOR AREA	PREMISES OCCUPANCY CLASSIFICATION	PREMISES POSTAL CODE	TAX LOT ID
	Address Line 1	Owner	Min Max	Premises Occupancy Classification	Premises Postal Code	Tax Lot Id
	198832 SE Arthur Loop	Econohomes	68,177	COMMERCIAL	10101-4795	10101/132e1
	90256 S Cantaloupe Court	Conservice	51,688	COMMERCIAL	10101-4370	10101/1f7f1
	241773 W Apples Avenue	LGI Development	59,341	COMMERCIAL	10101-6175	10101/230e0
	4455 N Ash Lane	Asset Realty Group	330,369	COMMERCIAL	10101-7497	10101/2417d
	162695 NW Monroe Alley	Memphis Invest	323,725	COMMERCIAL	10101-8073	10101/25e4b
	16643 W Ford Alley	Keller Williams Capital Properties	288,029	COMMERCIAL	10101-3986	10101/27d4b
	181881 E Myrtle Street	Accurate Group	215,255	COMMERCIAL	10101-2717	10101/2b760
	243909 SW Taft Boulevard	@Properties	234,831	COMMERCIAL	10101-9544	10101/2e66d
	219222 SW Filbert Avenue	Pangea Properties	142,331	COMMERCIAL	10101-6331	10101/54q5f
	199110 W Myrtle Boulevard	Econohomes	302,514	RESIDENTIAL-MULTI FAMILY	10101-9430	10101/36bf0

Display: 10 buildings Showing 1 to 10 of 512 buildings < Previous Next >

Record Matching – Review

Need to update this slide with latest code for hand matching and the results dialog box 1/31/2017

Data file name being matched to the existing building records

The pulldown list allows you to see all the records, just the matched records, or just the unmatched records

Existing building record being matched to

Click **View/Hide Columns** to control the fields that are displayed

The screenshot shows a software interface for record matching. On the left, there is a table labeled "Data file being matched" with columns "ADDRESS LINE 1" and "PM PROPERTY ID". The data includes various addresses and property IDs. Above this table is a dropdown menu with options: "Show All" (which is selected), "Show All", "Show Matched", and "Show Unmatched". To the right of this table is another table labeled "Matched Buildings" with columns "MATCH", "CONFIDENCE", "ADDRESS LINE 1", "PM PROPERTY ID", and "TAX LOT ID". This table lists the same addresses from the first table, each with a checked "MATCH" box and a "CONFIDENCE" of 100%. A red arrow points from the "Matched Buildings" table back to the "Data file being matched" table, with the text "In this example, the only common field between the two data files to match on is **Address Line 1**". At the bottom left, there is a "Display" dropdown set to "10 buildings". At the bottom center, it says "Showing 1 to 10 of 512 buildings (0 unmatched)". At the bottom right, there are navigation buttons: "« First Record", "< Previous", "Next >", and "Last Record »".

ADDRESS LINE 1	PM PROPERTY ID
Address Line 1	Pm Property Id
000015581 SW Sycamore Court	101125
000076655 SE Cordia Boulevard	102843
137299 SW Hemlock Loop	112963
196013 S Jackson Highway	113890
0000184039 S Catalpa Highway	121123
94734 SE Honeylocust Street	121690
14397 N Grapes Way	122147
000078024 N Filbert Highway	124903
181123 NW Clementine Lane	127351
17430 E Cantaloupe Highway	127810

File Source: portfolio-manager-sample.csv

Show All ▾

Matched Buildings

MATCH	CONFIDENCE	ADDRESS LINE 1	PM PROPERTY ID	TAX LOT ID
<input checked="" type="checkbox"/>	100%	15581 SW Sycamore Court	101082D867	
<input checked="" type="checkbox"/>	100%	76655 SE Cordia Boulevard	1011043A53	
<input checked="" type="checkbox"/>	100%	137299 SW Hemlock Loop	101106DD4A	
<input checked="" type="checkbox"/>	100%	196013 S Jackson Highway	101074692C	
<input checked="" type="checkbox"/>	100%	184039 S Catalpa Highway	10101870D0	
<input checked="" type="checkbox"/>	100%	94734 SE Honeylocust Street	10106913A0	
<input checked="" type="checkbox"/>	100%	14397 N Grapes Way	1010289133	
<input checked="" type="checkbox"/>	100%	78024 N Filbert Highway	10104208F2	
<input checked="" type="checkbox"/>	100%	181123 NW Clementine Lane	101073A89A	
<input checked="" type="checkbox"/>	100%	17430 E Cantaloupe Highway	10110A2B5D	

Display: 10 buildings

Showing 1 to 10 of 512 buildings (0 unmatched)

« First Record < Previous Next > Last Record »

Click on a record (**Address Line 1**) to see the details of the record match (see next page)

Record Matching – Match by hand

Need to update this slide with latest code for hand matching and the results dialog box 1/31/2017

File Source: portfolio-manager-sample.csv	
ADDRESS LINE 1	PM PROPERTY ID
Address Line 1	Pm Property Id
000015581 SW Sycamore Court	101125

Click on an Address or ID from the Matching list to see the details of the matched records

You can match “by hand” if needed

- To unmatched the automatic matching done by the program
- To force a match that the program didn’t make

Type criteria into the **Filter** box to see if there are other records you want to match “by hand”

Click **View/Hide Column** to select the fields to display

Back to List				<input type="button" value="View/Hide Columns"/>
MATCH	ADDRESS LINE 1	PM PROPERTY ID	TAX LOT ID	
	Address Line 1	Pm Property Id	Tax Lot Id	
Building from Source: portfolio-manager-sample.csv Matched!				
<input checked="" type="checkbox"/>	000015581 SW Sycamore Court	101125		
Potential Matches from Source: Existing Buildings				
<input checked="" type="checkbox"/>	15581 SW Sycamore Court		101082D867	
<input type="checkbox"/>	198832 SE Arthur Loop	634829	10101132E1	
<input type="checkbox"/>	90256 S Cantaloupe Court	413717	101011F7F1	
<input type="checkbox"/>	241773 W Apples Avenue	178388	10101230EO	
<input type="checkbox"/>	4455 N Ash Lane	929775	101012417D	
<input type="checkbox"/>	162695 NW Monroe Alley	959006	1010125E4B	
<input type="checkbox"/>	16643 W Ford Alley	956153	1010127D4B	
<input type="checkbox"/>	181881 E Myrtle Street	451449	101012B760	
<input type="checkbox"/>	0000243909 SW Taft Boulevard	922911	101012E66D	
<input type="checkbox"/>	219222 SW Filbert Avenue	800676	1010134A5F	
<input type="checkbox"/>	199110 W Myrtle Boulevard	391603		

You can uncheck the record the program matched, if needed

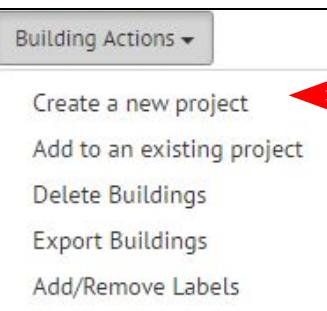
You can also check (select) multiple building records to be associated with one Portfolio Manager record and vice-versa

Projects – Filter data from Building List for Project

Projects allow filtered data to be saved together

(Labeling in Projects is currently disabled but will be reinstated in future versions)

Step 2:
Select the
building records



Step 3: From the Building Actions pulldown, select Create a new project

43 Buildings

Buildings List List Settings Reports Labels

Step 1:
Filter the data as needed

<input checked="" type="checkbox"/>	TAX LOT ID	GROSS FLOOR AREA FT ²	BUILDING COUNT	ADDRESS LINE 1	OWNER	CITY	STATE PROVINCE	POSTAL CODE	USE DESCRIPTION
	Tax Lot Id	Gross Floor Area	Building Count	Address Line 1	Owner	City	State Province	Postal Code	hotel
<input checked="" type="checkbox"/>	10105CE1A8	258,869	1	0000108393 N Gr...	Clear Title Agency ...	EnergyTown	Illinois	10105-8589	HOTELS/MOTELS
<input checked="" type="checkbox"/>	10105687C3	371,595	1	0000108883 E Fil...	Meridian Pacific Pr...	EnergyTown	Illinois	10105-4759	HOTELS/MOTELS
<input checked="" type="checkbox"/>	10102971D8	224,342	1	0000139173 N Ma...	Keller Williams Re...	EnergyTown	Illinois	10102-9320	HOTELS/MOTELS
<input checked="" type="checkbox"/>	101098EA35	252,930	1	0000190741 NW ...	Accurate Group	EnergyTown	Illinois	10109-5278	HOTELS/MOTELS
<input checked="" type="checkbox"/>	1010316A90	351,585	1	000043598 W Tan...	HomeSmart	EnergyTown	Illinois	10103-4839	HOTELS/MOTELS
<input checked="" type="checkbox"/>	10103DA53A	310,018	1	000073377 W Pol...	Meridian Pacific Pr...	EnergyTown	Illinois	10103-8731	HOTELS/MOTELS
<input checked="" type="checkbox"/>	10102521C9	172,192	1	000099258 S Cott...	Urban Lending Sol...	EnergyTown	Illinois	10102-9359	HOTELS/MOTELS
<input checked="" type="checkbox"/>	1011094692	59,501	1	101963 S Van Bur...	Maximum One Rea...	EnergyTown	Illinois	10110-4019	HOTELS/MOTELS
<input checked="" type="checkbox"/>	10110E438F	265,462	1	142735 N Clinton ...	ATG Title	EnergyTown	Illinois	10110-6459	HOTELS/MOTELS
<input checked="" type="checkbox"/>	101093FF91	383,773	1	153200 NE Tanoak...	PropertyRate	EnergyTown	Illinois	10109-8384	HOTELS/MOTELS

Display: 10 buildings Showing 1 to 10 of 43 buildings << First Record

Projects - Create

Create a New Project

Project Name Hotel Compliance

Add compliance information.

Compliance Information

Submittal Type Benchmarking

Year Ending Date December, 2013
Choose the year ending month for report period.

Reporting Deadline mm/dd/yyyy

June, 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

E Filbert Road

n Buren Street

The **Create a New Project** screen allows you to name the project and add compliance information if desired.

If you check the **Add compliance information** box, the Compliance Information section appears.

Success!

43 buildings added to the project **Hotel Compliance**.

Close

View Project

When you have defined the project, click the **Create Project** button.

When the program has created the project, click the **View Project** button to view the records in the Project

Projects – Hotel Compliance Project

The filter was Premises Occupancy Classification = Hotel

43 Records were found to fit this filter

This information is from entries in the Create New Project screen

Project Actions ▾		Hotels (43 Buildings)						
		Project Buildings		List Settings				
		TYPE OF SUBMITTAL: Benchmarking YEAR ENDING: 12/31/2014 DEADLINE: 04/30/2015						
□	Status	TAX LOT ID	GROSS FLOOR AREA FT ²	BUILDING COUNT	ADDRESS LINE 1	OWNER	USE DESCRIPTION	YEAR BUILT
	Status	Tax Lot Id	Gross Floor Area	Building Count	Address Line 1	Owner	Use Description	Year Built
□		1010141BB1	388,473	1	236410 NW Cedar...	Schmidt Real Estate	HOTELS/MOTELS	2000
□		1010199DB8	195,267	1	194087 SE Fillmor...	Reliant Realty	HOTELS/MOTELS	1982
□		10102521C9	172,192	1	000099258 S Cott...	Urban Lending Sol...	HOTELS/MOTELS	1942
□		10102971D8	224,342	1	0000139173 N Ma...	Keller Williams Re...	HOTELS/MOTELS	1965
□		1010314C96	379,375	3	235016 SW Melon...	Hawaii Life	HOTELS/MOTELS	1986
□		1010316A90	351,585	1	000043598 W Tan...	HomeSmart	HOTELS/MOTELS	1962
□		1010343575	115,726	1	216971 NW True W...	GRS Group	HOTELS/MOTELS	1957
□		101034EB74	54,433	1	6379 SW Guava Ro...	Asset Plus Compan...	HOTELS/MOTELS	1911
□		10103DA53A	310,018	1	000073377 W PoL...	Meridian Pacific Pr...	HOTELS/MOTELS	1964
□		10103EAFDD	75,130	1	206960 S Guava L...	Trust Field Services	HOTELS/MOTELS	1999

Display: 10 buildings Showing 1 to 10 of 43 buildings

« First Record < Previous Next > Last Record »

Projects – Export to XLS

Projects can be exported to CSV or XLS files

Step 1:

Check records to be exported (check top box for all records)



Step 2:

Click on Project Actions and select Export Buildings

Step 3:

Name the export file and specify the file format



FLOOR AREA FT ²	BUILDING COUNT	ADDRESS LINE 1	OWNER	USE DESCRIPTION	YEAR BUILT	ENERGY SCORE
Building Area	Building Count	Address Line 1	Owner	Use Description	Year Built	Energy Score
50,838	1	47081 SW Aspen L...	ISGN	HOTELS/MOTELS	1959	2
54,718	1	74477 SW HoneyL...	NTP Wireless	HOTELS/MOTELS	1000	20
293,421	1	207224 W Clinton...	The Ruby Group	HOTELS/MOTELS	1986	37
351,585	1	000043598 W Tan...	HomeSmart	HOTELS/MOTELS	1962	37
379,375	3	235016 SW Melon...	Hawaii Life	HOTELS/MOTELS	1986	51
373,152	1	159308 SE Sycam...	Innotion Enterpris...	HOTELS/MOTELS	1970	60
388,106	1	187913 SE Apple ...	Realty ONE Group	HOTELS/MOTELS	1965	66
364,753	1	181123 NW Cleme...	Cal-American Hom...	HOTELS/MOTELS	1928	66
346,940	1	33080 SE True Loo...	Nationwide Appra...	HOTELS/MOTELS	1979	80
67,334	1	75520 E Buckthor...	MG Properties Gro...	HOTELS/MOTELS	1989	80

Display: 10 buildings Showing 1 to 10 of 43 buildings < First Record < Previous Next > Last Record >

Export your Buildings

Export Name: Hotel Compliance

CSV XLS

Cancel Export

Step 4:
Click the Export button
The file will be saved to
your **downloads** folder