Standard Energy Efficiency Data Platform™

SEED PLATFORM™

STANDARD ENERGY EFFICIENCY DATA

U.S. DEPARTMENT OF ENERGY

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SEED PLATFORM™ 2.6.1 patch
Mapping and Merging Data

Version
2.6.1.395db33d
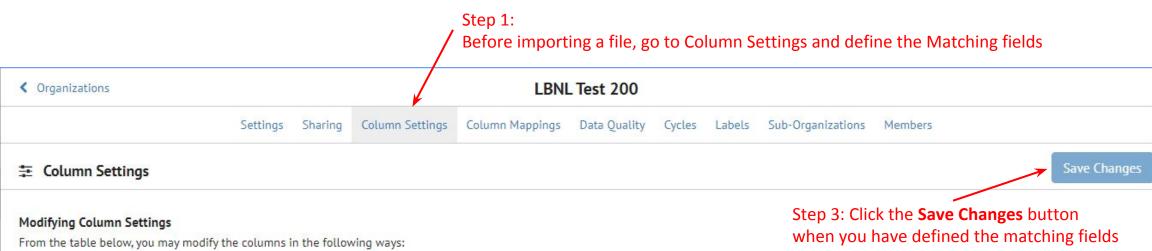
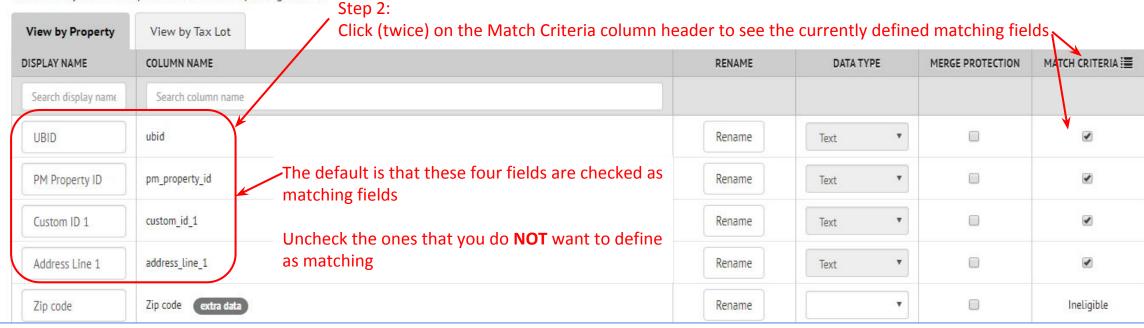## Matching fields in Column Settings

- Matching fields are now customizable within the Column Settings page. Also, the accompanying matching logic has been simplified -- records match only if **all** of the matching fields have matching values.

- You should redefine or update your matching columns now (in Column Settings) before importing any new data, and going forward only make changes when necessary. In later releases, these matching columns will decide how records are linked/associated across cycles.

- If the matching fields need to be changed because of changes in the data being imported (such as adding a Custom ID as a matching field) make sure to reset the matching fields in Column Settings before importing the file with the new matching field(s).

Matching fields: Column Settings

Step 1:
Before importing a file, go to Column Settings and define the Matching fields

❮ Organizations   **LBNL Test 200**

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

≢ **Column Settings**   Save Changes

Step 3: Click the **Save Changes** button
when you have defined the matching fields

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

- Change the display name of a column
- Rename "Column Name", which specifies the underlying, system-level column to use
- Specify the data type of extra data columns
- Toggle merge protection for specific columns
- For non-extra_data columns, toggle whether the column is matching criteria

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 mer
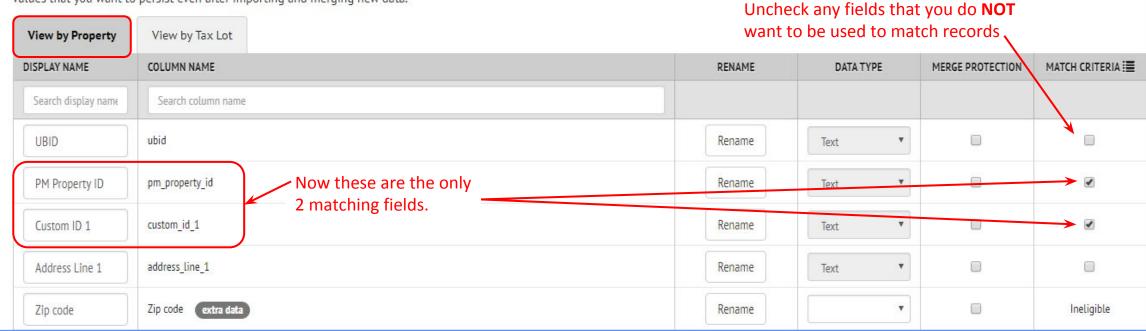
Step 2:
Click (twice) on the Match Criteria column header to see the currently defined matching fields

View by Property	View by Tax Lot					
DISPLAY NAME	**COLUMN NAME**			**RENAME**	**DATA TYPE**	**MERGE PROTECTION**	**MATCH CRITERIA ≣**
Search display name	Search column name						
UBID	ubid			Rename	Text ▾	☐	✔
PM Property ID	pm_property_id			Rename	Text ▾	☐	✔
Custom ID 1	custom_id_1			Rename	Text ▾	☐	✔
Address Line 1	address_line_1			Rename	Text ▾	☐	✔
Zip code	Zip code extra data			Rename	▾	☐	Ineligible

The default is that these four fields are checked as matching fields

Uncheck the ones that you do **NOT** want to define as matching

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Matching fields: Column Settings: Property

Set the Matching fields for the Property data

‹ Organizations

LBNL Test 200

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

⇵ **Column Settings**

Save Changes

Click the **Save Changes** button when you have defined the matching fields
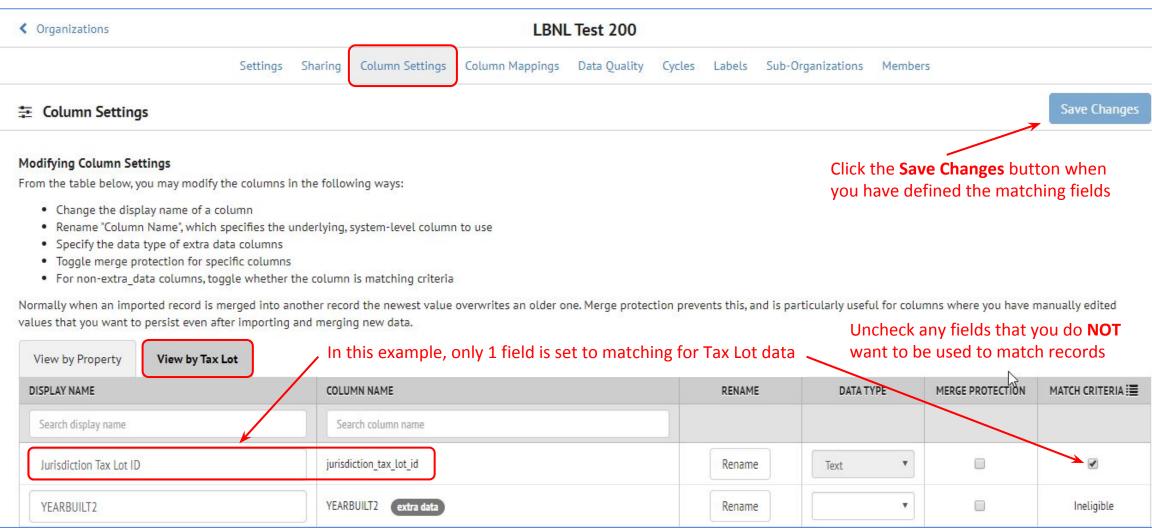
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Uncheck any fields that you do **NOT** want to be used to match records

View by Property	View by Tax Lot

DISPLAY NAME	COLUMN NAME	RENAME	DATA TYPE	MERGE PROTECTION	MATCH CRITERIA ≣
Search display name	Search column name				
UBID	ubid	Rename	Text	☐	☐
PM Property ID	pm_property_id	Rename	Text	☐	☑
Custom ID 1	custom_id_1	Rename	Text	☐	☑
Address Line 1	address_line_1	Rename	Text	☐	☐
Zip code	Zip code extra data	Rename		☐	Ineligible

Now these are the only 2 matching fields.

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Matching fields: Column Settings: Tax Lot

Set the Matching fields for the Tax Lot data

Click the **Save Changes** button when you have defined the matching fields

In this example, only 1 field is set to matching for Tax Lot data

Uncheck any fields that you do **NOT** want to be used to match records

Mapping on Import

Map the appropriate fields in the import file to the Matching fields defined in Column Settings

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 ___ ow the ___ ched and ___ well as how it is displayed ___ tory vi ___

Property | Tax Lot | Property
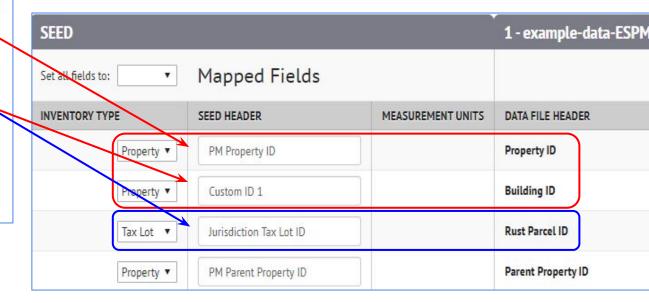
Field names for matching: Custom ID 1, Jurisdiction Tax Lot ID, PM Property ID

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.

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.

The program will display the matching fields that were set in Column Settings (future versions will group them by Property and Tax Lot)

SEED   1 - example-data-ESPM

Set all fields to: [▼]   Mapped Fields

INVENTORY TYPE	SEED HEADER	MEASUREMENT UNITS	DATA FILE HEADER
Property ▼	PM Property ID		Property ID
Property ▼	Custom ID 1		Building ID
Tax Lot ▼	Jurisdiction Tax Lot ID		Rust Parcel ID
Property ▼	PM Parent Property ID		Parent Property ID

Set the appropriate fields to the matching fields defined in Column Settings. In this case:
- Property ID ⇒ PM Property ID (Property data)
- Building ID ⇒ Custom ID 1 (Property data)
- Rust Parcel ID ⇒ Jurisdiction Tax Lot ID (Tax Lot data)