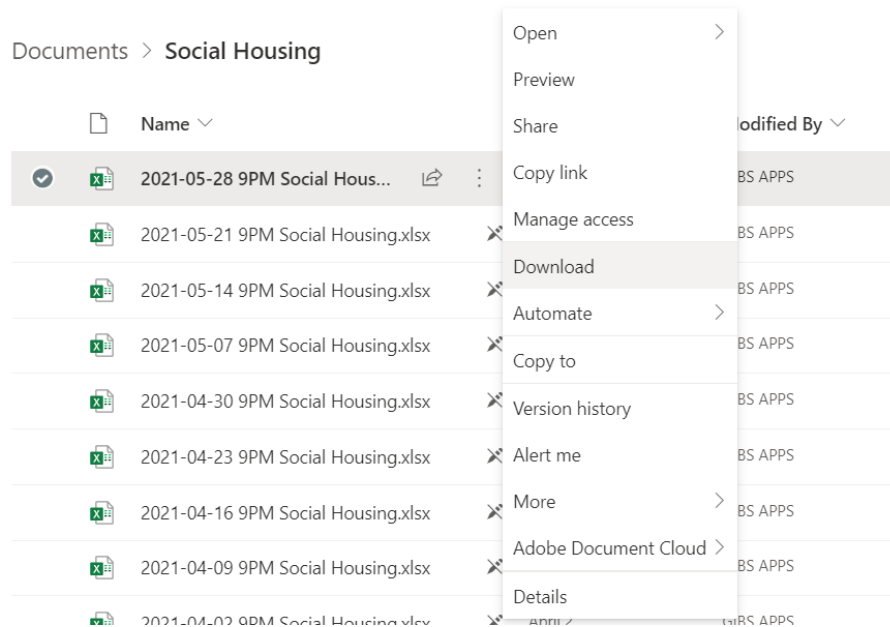![greensaver - Energy Conservation In Action]

GreenSaver Social Housing Weekly Report

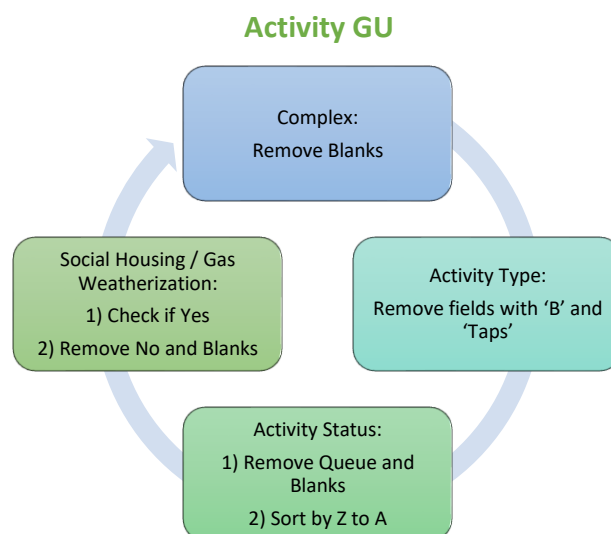## PowerBI – Update How-To

Step 1: Access and Download the latest Social Housing GIBs Excel Pull from the local SharePoint drive by hovering over the file.
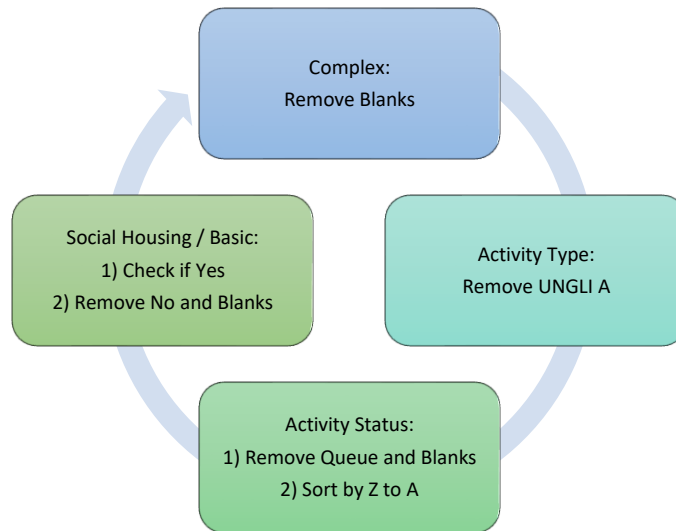

SharePoint Accessible Here:
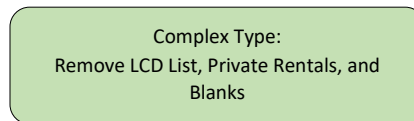https://greensaverorg.sharepoint.com/:f:/r/sites/DataDownload/Shared%20Documents/Social%20Housing?csf=1&web=1&e=GFFa41

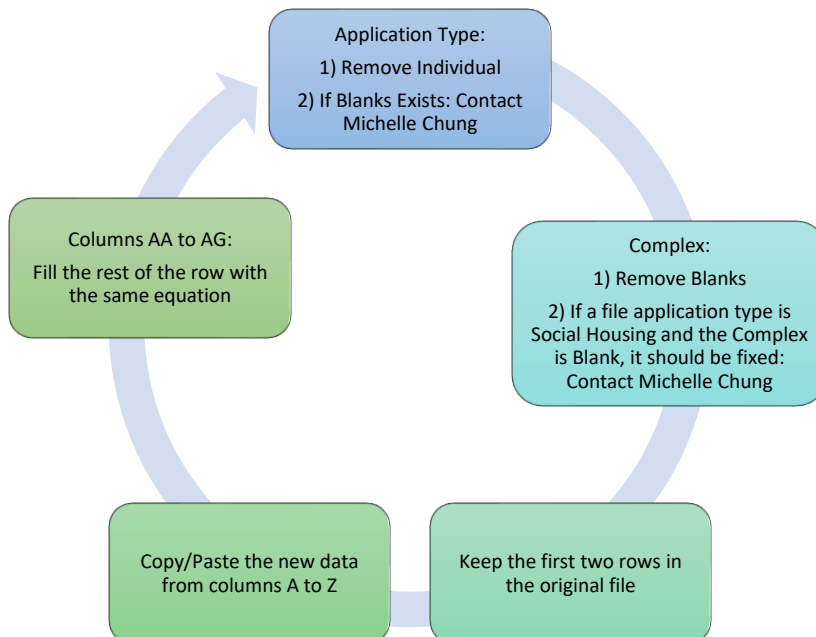**Step 2:** Open Downloaded Excel Spreadsheets to Filter and Sort each Tab as indicated below.
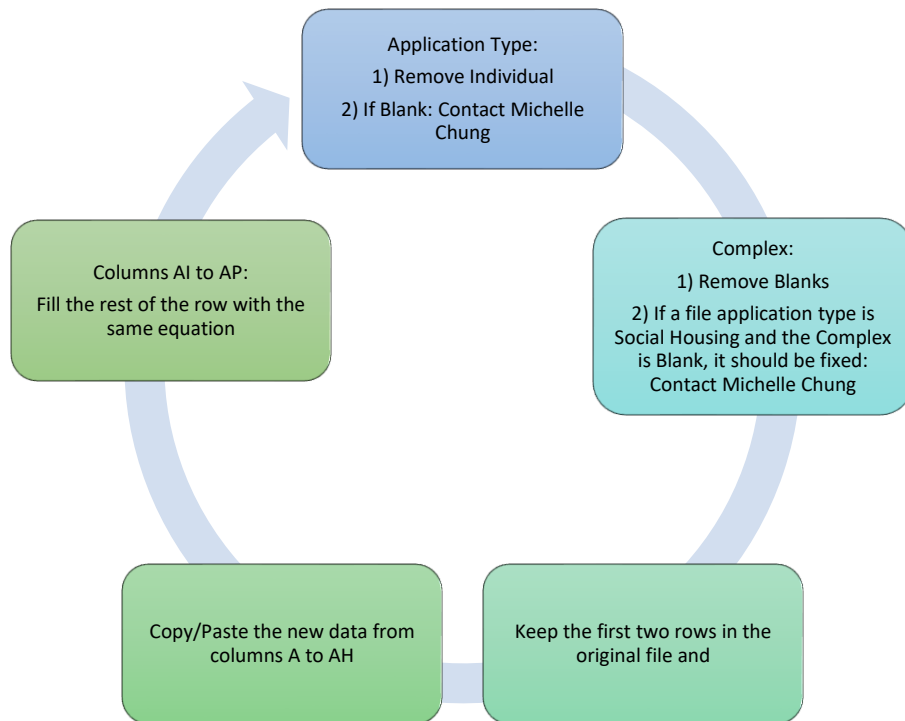
Activity IESOHAP

Complex:
Remove Blanks

Activity Type:
Remove UNGLI A

Activity Status:
1) Remove Queue and Blanks
2) Sort by Z to A

Social Housing / Basic:
1) Check if Yes
2) Remove No and Blanks

Complex Model

Complex Type:
Remove LCD List, Private Rentals, and Blanks

GU Application

Application Type:
1) Remove Individual
2) If Blanks Exists: Contact Michelle Chung

Complex:
1) Remove Blanks
2) If a file application type is Social Housing and the Complex is Blank, it should be fixed: Contact Michelle Chung

Keep the first two rows in the original file

Copy/Paste the new data from columns A to Z

Columns AA to AG:
Fill the rest of the row with the same equation

IESOHAP Application

Application Type:
1) Remove Individual
2) If Blank: Contact Michelle Chung

Complex:
1) Remove Blanks
2) If a file application type is Social Housing and the Complex is Blank, it should be fixed: Contact Michelle Chung

Keep the first two rows in the original file and

Copy/Paste the new data from columns A to AH

Columns AI to AP:
Fill the rest of the row with the same equation

SH Assessment Calendar

Copy the City Column and Paste after Complex Address Column

Delete City column in Column C

Delete all rows with Phase 5 fields

Delete blank and crossed out rows
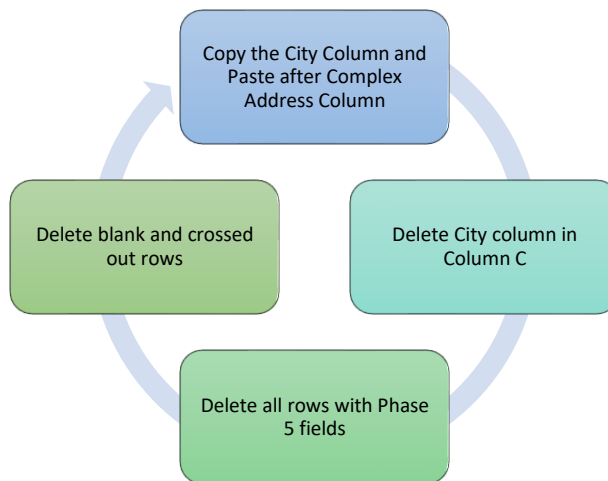
Step 3: Select All, Copy, and Paste sorted data into its corresponding Excel File to be used as the PowerBI data source.

Note: File name must match tab name in this step. Activity GU and Activity IESOHAP are found within the Activity Model Excel Spreadsheet.
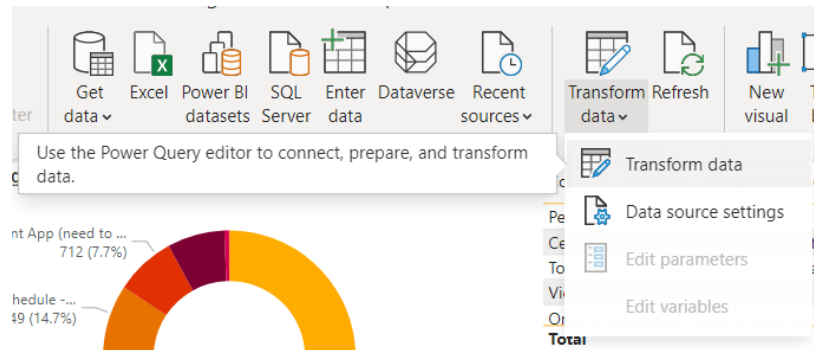
Access PowerBI Data Source Here:

https://drive.google.com/drive/folders/1DURugyA1SIjiPSPo1IoqkiXw6lOJtgqu?usp=sharing

Step 4: Download the PowerBI Report: 'Social Housing Projects Tracker'.
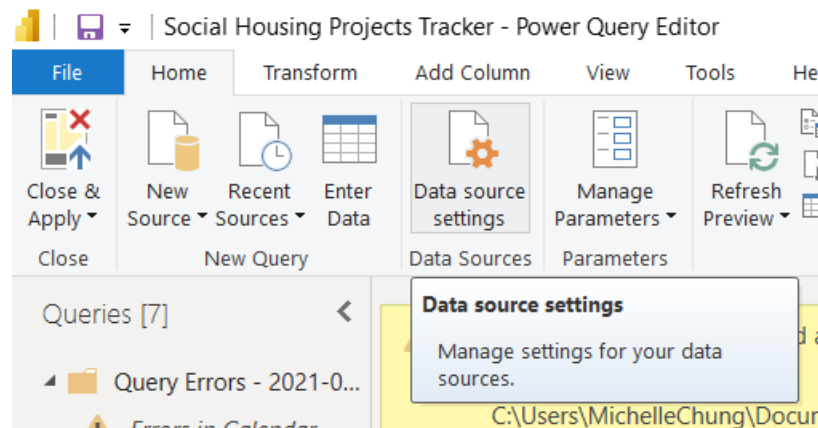
Access PowerBI Report Here:

https://drive.google.com/drive/folders/12tEJyXF1HFoJECKBCGcu7M9LzPcDEmjm?usp=sharing
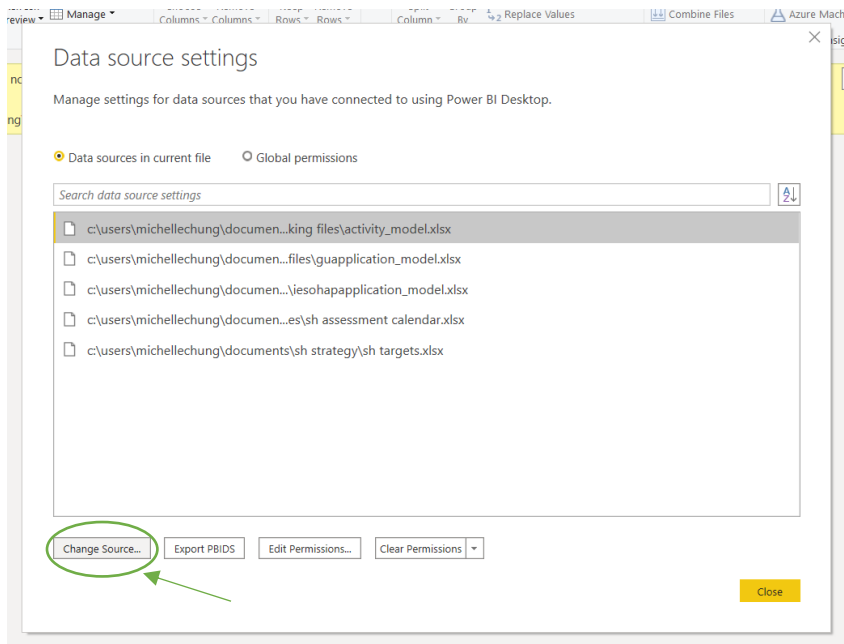
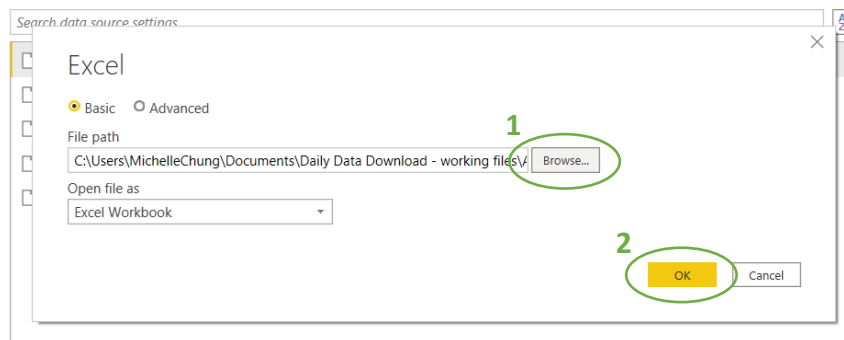**Step 5:** Open the PowerBI Report. Go to the 'Home' Tab and click on 'Transform Data'.

**Step 6:** Next, click on 'Data Source Setting'.

Step 7: Then, click on each file and click 'Change Source'.

Step 8: Click on 'Browse' to link the updated Excel Spreadsheet in correspondence to the file name. Once added, click on 'OK'. Repeat the data source changing process for remaining files. After spreadsheets are individually linked, finish the process by clicking 'Close'.
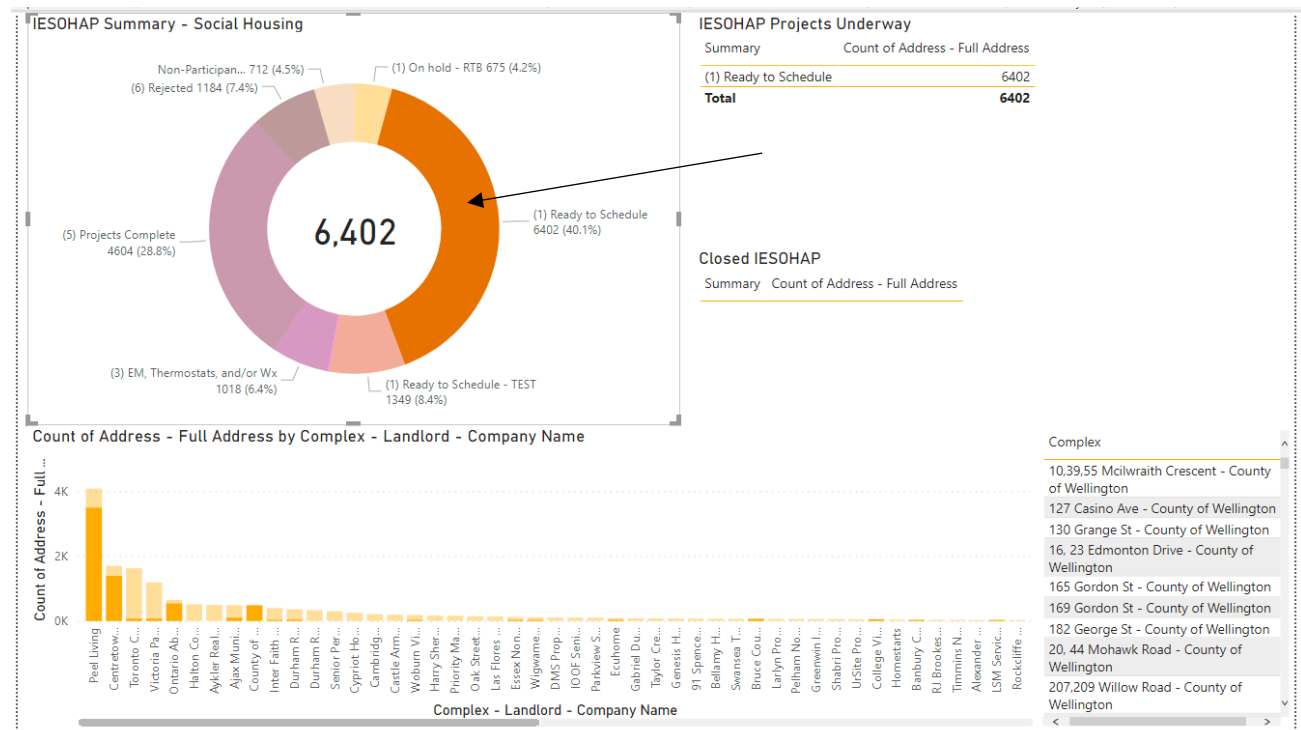
Note: Once all files have been linked to the PowerBI Report, the next weekly updated Excel files can update the dashboard by clicking on the 'Refresh' button on the 'Home' Tab.
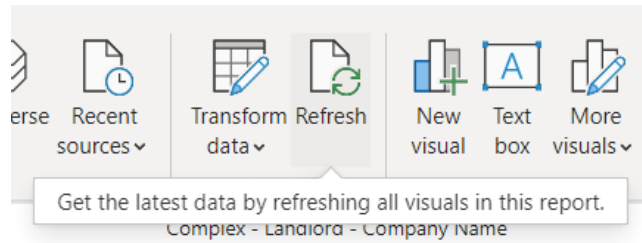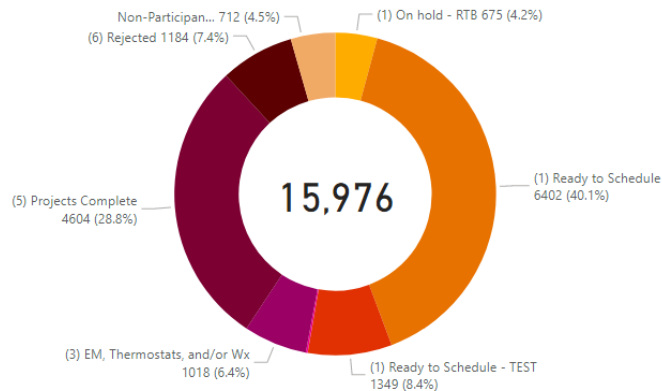

PowerBI – User Guide

Note: The dynamic dashboard will change in accordance to data clicked on, either it be one of the columns in a table or one of the visuals in a chart. Below is an example of the report when '(1) Ready to Schedule' is clicked on within the donut percentage chart.

Page 1 - HAP Summary:

IESOHAP Summary - Social Housing

Non-Participan... 712 (4.5%)
(6) Rejected 1184 (7.4%)
(1) On hold - RTB 675 (4.2%)
(5) Projects Complete 4604 (28.8%)
15,976
(1) Ready to Schedule 6402 (40.1%)
(3) EM, Thermostats, and/or Wx 1018 (6.4%)
(1) Ready to Schedule - TEST 1349 (8.4%)

Description: Percent Distribution of Social Housing IESOHAP Summary out of the Total Number of Complexes. The Total Number of Complexes with IESOHAP Summary is presented in the center of the donut chart.

Count of Address - Full Address by Complex - Landlord - Company Name
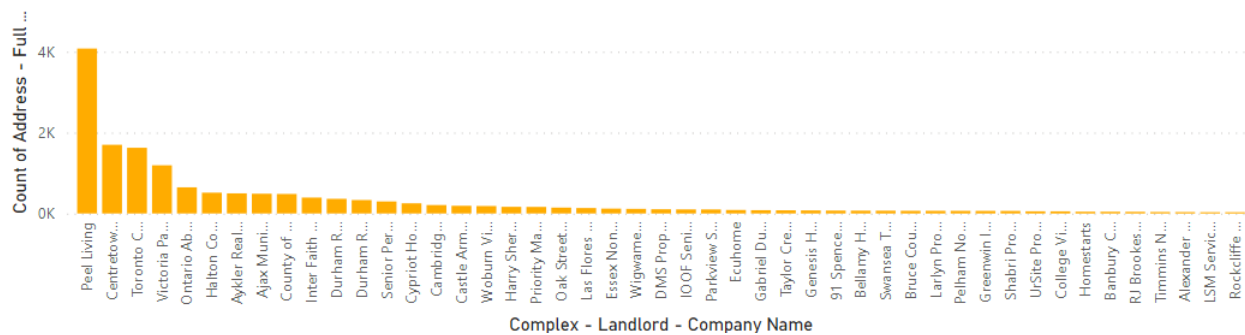
Description: Count Distribution of Addresses sorted by Complex from Greatest to Least.

IESOHAP Projects Underway

Summary	Count of Address - Full Address
(1) On hold - RTB	675
(1) Ready to Schedule	6402
(1) Ready to Schedule - TEST	1349
(1) Scheduled	3
(2) QA - Initial	28
(3) EM, Thermostats, and/or Wx	1018
0	1
Non-Participant App (need to change)	712
Total	**10188**

Description: Count Distribution of IESOHAP Summary by the Number of Addresses.

Description: Click on any specific column to filter out the visualization on the page for a specific complex.

Page 2 – HAP Scheduling:

Scheduling Stages - HAP

Non-Participant App (need to ...
712 (7.7%)

1. Ready to Schedule -...
1349 (14.7%)

1. Ready to Schedule
6402 (69.6%)

Description: Percentage Distribution of HAP Scheduling Stages.

Count of Sched Activity Status by Year, Month and Sched Activity Status

Sched Activity Status ● 1. Ready to Schedule ● 1. Ready to Schedule - ... ● 2. Assessments Sc... ● Cancelled ● Cancelled - By Ad... ● Cancelled - By ... ● Cancelled - N... ● Complete ● Dispatched ● On hold

Description: Count Distribution of Shed Activity Status sorted by Month, Year, and Scheduled Activity Status.

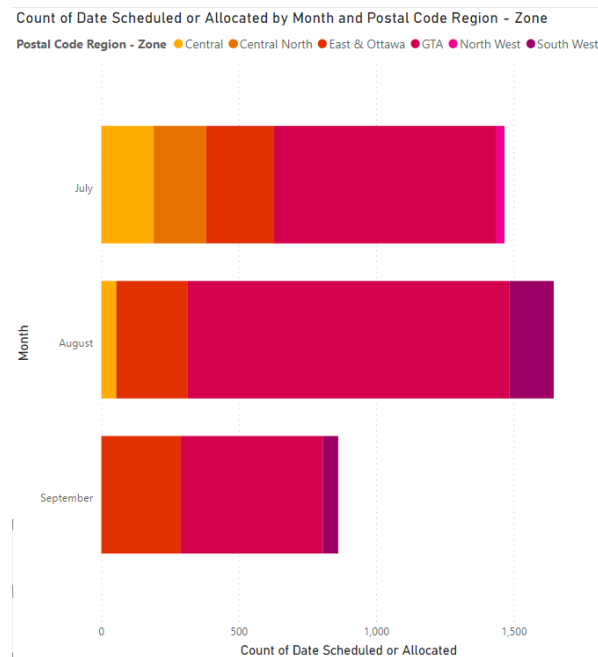| Complex - Landlord - Company Name	Count of Address - Full Address
Peel Living	4100
Centretown Citizens Ottawa Corporation	1698
Toronto Community Housing Corporation TCHC	1624
Victoria Park Community Homes	1379
Ontario Aboriginal Housing Services	681
Total	**16599**

Description: Number of Addresses per Complex.

Complex	Sched Activi
10,39,55 Mcilwraith Crescent - County of Wellington	1. Ready to Schedule
127 Casino Ave - County of Wellington	1. Ready to Schedule
130 Grange St - County of Wellington	1. Ready to Schedule
16, 23 Edmonton Drive - County of Wellington	1. Ready to Schedule
Total	

Description: Number of Addresses per Complex with associated Sched Activity Status.

Page 3 – HAP Sched Month:

Count of Date Scheduled or Allocated by Month and Postal Code Region – Zone
Postal Code Region - Zone ● Central ● Central North ● East & Ottawa ● GTA ● North West ● South West
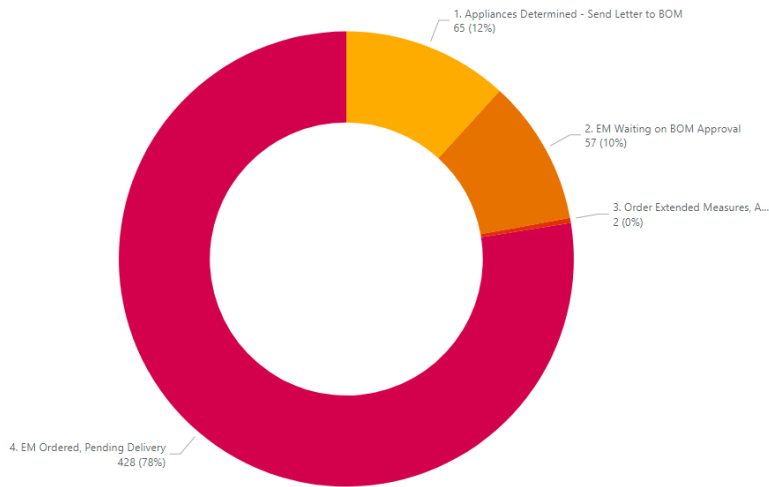
Description: Date Scheduled sorted by Month and Postal Code Region – Zone.

Page 4 – HAP EM:

Count of Address - Full Address by EM Stage

1. Appliances Determined - Send Letter to BOM
65 (12%)

2. EM Waiting on BOM Approval
57 (10%)

3. Order Extended Measures, A...
2 (0%)

4. EM Ordered, Pending Delivery
428 (78%)

Description: Percent Distribution of EM Stage.

| Complex |
| --- |
| 1 Founders Way |
| 10 to 28 Walker Street (even) Thessalon - Algoma District Housing |
| 10,39,55 Mcilwraith Crescent - County of Wellington |
| 11 Cecil St |
| 11 Monte Carlo - VPCH |
| 1156 Community - Ryegate Coop |
| 117 Marshall - Harmony Haven |
| 12 River - Angus Coop |
| 1200 Attlee - Greater Sudbury |
| 12184 Ninth Line - Parkview Village |
| 127 Casino Ave - County of Wellington |
| 130 Bellamy Road - Bellamy Housing Coop |
| 130 Grange St - County of Wellington |
| 139 Meadow Lane, |
| 14 Victoria St - Lancaster NP |
| 148 Lansdowne Ave - Kingsville Legion |
| 151 Queen St N (The Village) - VPCH |
| 152 Weller Avenue |
| 16 Kenilworth Ave North - OAHS |
| 16, 23 Edmonton Drive - County of Wellington |
| 160 Guelph - Eramosa Non Profit Housing |
| 165 Gordon St - County of Wellington |
| 169 Gordon St - County of Wellington |
| 180 Groves Terrace - Bogart Creek Co-op |
| 182 George St - County of Wellington |
| 194 Rexleigh Drive - Taylor Creek |
| 2 Sabrina Park Dr - Muskoka |
| 20 Brooks St (IOOF – Heritage Place) |
| 20, 44 Mohawk Road - County of Wellington |
| 207,209 Willow Road - County of Wellington |
| 22 James St - Parkview Lodge |

Description: Click on any specific column to populate the Percent Distribution of EM Stage for a specific address.
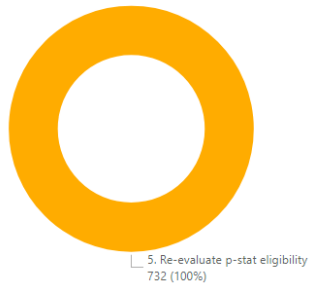
Page 5 – HAP Wx Ther:

Count of Address - Full Address by Wx Stage

2. Approved for Weatherization
10 (100%)
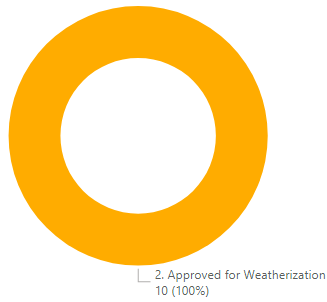
Description: Percentage Distribution of Wx Stage.

Count of Address - Full Address by Thermostat Stage

5. Re-evaluate p-stat eligibility
732 (100%)

Description: Percentage Distribution of Thermostat Stage.

Page 6 – GU Summary

Count of Wx Summary by Wx Summary

(1) Ready to Schedule
298 (10%)

(8) Rejected - DNQ Wx
1217 (42%)

(1) Ready to Schedule - TEST
667 (23%)

(1) Scheduled
1 (0%)

(4) Weatherization
80 (3%)

(7) Wx Project Complete
507 (18%)
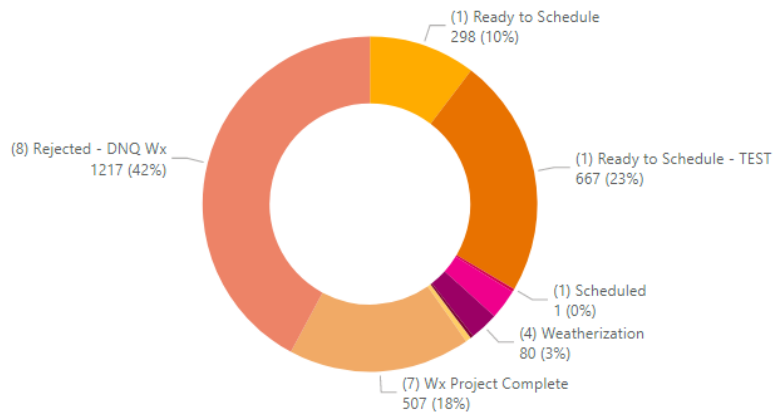
Description: Percentage Distribution of Wx Summary.

Count of Thermo Summary by Thermo Summary

- (5) Final QA Thermostats 86 (4%)
- (1) Ready to Schedule 295 (14%)
- (1) Ready to Schedule - TEST 738 (36%)
- (6) Thermo Project Com... 304 (15%)
- (7) Rejected - DNQ Thermo 594 (29%)
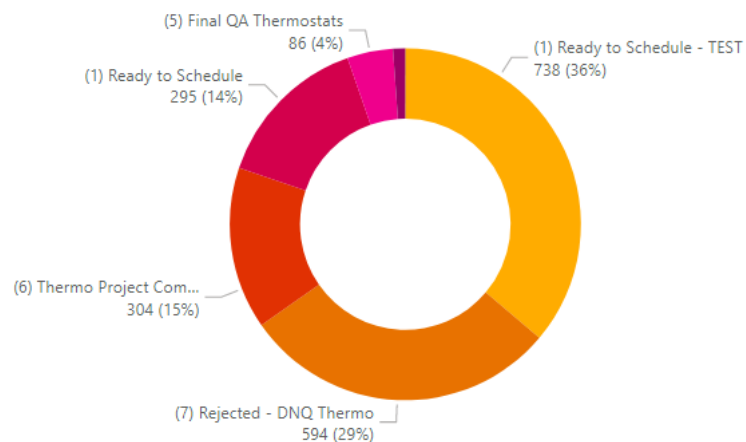
Description: Percent Distribution of Thermo Summary.

Wx Summary	Count of Wx Summary
(1) Ready to Schedule	298
(1) Ready to Schedule - TEST	667
(1) Scheduled	1
(3) Initial Assessment Modelling	8
(3) Initial Assessment Modelling - On hold, needs cleanup	84
(4) Weatherization	80
(4) Weatherization - On hold, needs cleanup	8
(5) Post Assessments Scheduled	1
(5) Ready to Schedule Post Assessment	15
Total	**1162**

Wx Summary	Count of Wx Summary
(7) Wx Project Complete	507
(8) Rejected - DNQ Wx	1217
Total	**1724**

Description: Count Distribution of Wx Summary.

Complex

- Wood Tree Coop
- Woburn Village Co-operative Homes
- Winkleigh Cooperative Housing - 960 Limeridge Road East and 100 Leggett Crescent
- Winchester and Metcalf - Three Streets Coop
- Wilcox Creek Coop (gas)
- Warden Woods - TCH
- Walpole - TCHC
- Wales Casimir - Wales Ave - TCH
- Wales Casimir - Casimir St. TCH
- Villa Joie de Vivre - West Nipissing
- Victoria Village - 2461 Whittaker Dr - VPCH
- VICTORIA PARK PLACE - 209 Springfield Cr - VPCH
- Victoria Park Estates - 2344 Barton St E - (VPCH)
- Victoria Park Ave - Clintwood NP

Description: Click on any specific column to filter the visualization on the page for a specific complex.

Thermo Summary	Count of Thermo Summary
(1) Ready to Schedule	295
(1) Ready to Schedule - TEST	738
(1) Scheduled	1
(3) Thermostat Lead	22
(5) Final QA Thermostats	86
Total	**1142**

Thermo Summary	Count of Thermo Summary
(6) Thermo Project Complete	304
(7) Rejected - DNQ Thermo	594
Total	**898**

Description: Count Distribution of Thermo Summary.

Page 7 – GU Scheduling

Count of GUADate by Month and GU Sched Activity

GU Sched Activity ● Cancelled - By Advisor ● Cancelled - No Show ● Complete
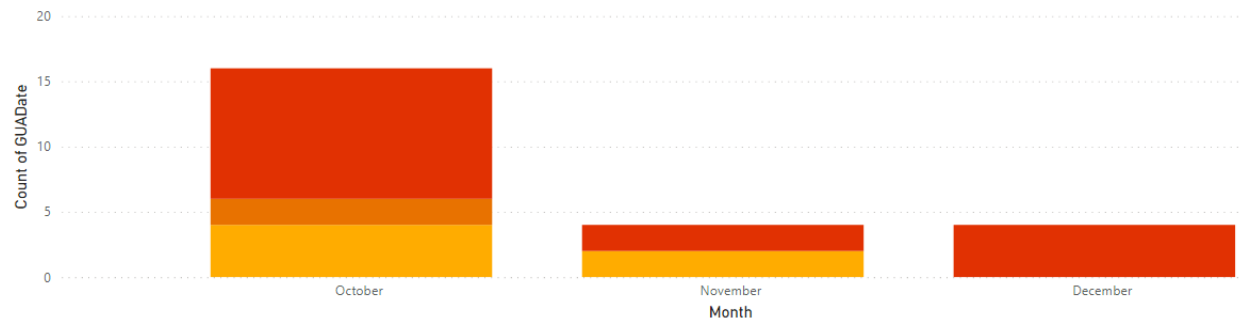
Description: Count Distribution sorted by Month and GU Sched Activity.

Year		2. Assessments Scheduled	Total
⊟ **2021**		1	1
	⊟ **May**	1	1
	20	1	1
	Total	1	1

Description: Total Number of GU Sched Activity sorted by Year, Month, and Day.