# New Data Quality Alerts in Portfolio Manager

Enhancements for Improved Data Quality

- EPA recently added new features to Portfolio Manager that will help ensure accurate and complete benchmarking.

    – Time-saving alerts to help you find and fix data input errors

    – Improvements to the Data Quality Checker

    – Enhancements to the Data Request feature used for New York City Local Law 84 reporting.

Portfolio Manager Data Request

ENERGY STAR®
PortfolioManager®

plaNYC | Green Buildings & Energy Efficiency
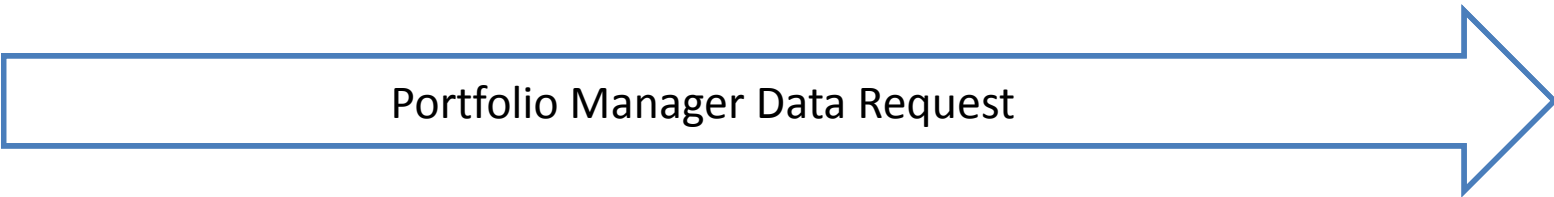
Submission to the City (for compliance in 2014):

Every year, to complete the benchmarking process, the newest reporting template must be generated in Portfolio Manager. This new template creates a new custom Compliance Report for LL84 that will then be submitted to the City every year to comply. A report needs to be completed for each lot required to benchmark. You will then submit the report to the City through Portfolio Manager.

- 2013 Compliance Report Template Activation (revised March 28, 2014)
- 2013 Compliance Report Instructions (revised March 28, 2014)

NYC™ Buildings

EPA

New data quality alert fields available in Portfolio Manager Reports

Alert- No meters are associated with the property
Alert- Meter has less than 12 full calendar months of data
Alert- Meter has gaps
Alert- Meter has overlaps
Alert- Data Center does not have an IT Meter
Alert- Property has no uses
Alert- Gross Floor Area is 0 ft2
Alert- Meter entry is more than 65 days long.
Estimated Values (y/n)
Default Values (y/n)
Temporary Values (y/n)
Data Quality Checker Run? (y/n)
Data Quality Checker - Date Run

- New alerts added to Portfolio Manager Reporting to help tool users identify data issues. Alerts based on underlying data problems that keep metrics from calculating (resulting in N/As)
- Alerts for Estimated, Temporary, or Default values available
- New fields indicating IF and WHEN the Data Quality Checker was run now available
- Alerts are useful for building owners and cities
  - ✓ Portfolio Manager users can add new alerts to any custom report to build-in data quality diagnostics into any analysis.
  - ✓ Cities can include new alerts in data requests so all annual reports will include more specific flags for data quality issues.

EPA

New "N/A Screen" in Portfolio Manager Data Requests

- **Problem**: incomplete annual benchmarking reports submitted to cities ("N/A" where metrics are expected).

- **Goal**: help users identify and fix their own errors/omissions BEFORE sending their data to a city.

- **Solution**: new "N/A Screen" alerts users when metrics can't be calculated, highlights data issues, and provides links to screen where issues can be fixed.

Finding data errors shouldn't be like finding a needle in the haystack!

New "N/A Screen" in Portfolio Manager Data Requests

- Available in all Portfolio Manager data requests as of Jan 2015.

- Portfolio Manager will now alert the user if at least one property within the response cannot receive an annual site EUI or Water Use metric for the performance period.

- An alert box then appears on the Reporting tab and an alert icon (⚠️) is included next to the affected data request in the "Templates & Reports" table.

- Clicking "Read more" will direct the user to a page that contains more details.

New "N/A Screen" for Portfolio Manager Data Requests

- After clicking "Read more" the user sees the alert page, listing all properties for which "Not Available" is present in the Site EUI or Water Use field alongside specific data quality alerts.
- Alerts included in this screen correspond to the 8 new data quality alerts added to custom reports
- The links within the alerts take the user to the Portfolio Manager screen where the data omissions/errors can be fixed. For example, the user can go directly to the electricity meter where gaps are present.

Data Request Response Has Missing Metrics (N/A's)

⚠ Your data response contains 41 properties where the Site EUI and/or Total Water Use could not be calculated.

When Site EUI and/or Total Water Use cannot be calculated, typically it means there is not 12 full months of complete meter data or there is a problem with your property's Gross Floor Area. These metrics are the basis for other more complicated metrics (such as the ENERGY STAR Score), so other metrics may also be unavailable as a result.

Properties With Missing Metrics (N/A's) (41) (response preview generated 01/22/2015 09:08 PM EST)

Property ID	Property Name	Period Ending Date	Site EUI	Total Water Use
3681819	Portfolio Manager Store	12/31/2014	The meter Electric Grid Meter does not have 12 full calendar months of bills for the selected year. Please enter bills for the full 12 months.	This property does not have at least one meter for the type of energy or water used in this metric calculation. For example, you cannot receive a value for "total electricity" if you only have gas meters. If you believe there is an error, go to the Meters tab, select "View/Edit Configuration" and make sure you've associated the correct meter(s) for use in your metrics.
3884860	Sample 1	12/31/2014	You do not have any meters associated with your property. To associate a meter, go to the Meters tab and select "View/Edit Configuration," then tell us which meters to add together for your performance metrics.	You do not have any meters associated with your property. To associate a meter, go to the Meters tab and select "View/Edit Configuration," then tell us which meters to add together for your performance metrics.
4021271	Sample 1	12/31/2014	You do not have any meters associated with your property. To associate a meter, go to the Meters tab and select "View/Edit Configuration," then tell us which meters to add together for your performance metrics.	You do not have any meters associated with your property. To associate a meter, go to the Meters tab and select "View/Edit Configuration," then tell us which meters to add together for your performance metrics.

EPA

New "N/A Screen" in Portfolio Manager Data Requests

The user has three options when N/As have been found:

1. Review and edit properties (using hotlinks or Excel)
2. Generate an updated response (they fixed the underlying data problems but didn't complete this step in the process)
3. Submit the response with N/As

Portfolio Manager Data Quality Checker

- Helps users check for errors and anomalies by identifying energy values and property use details that are unusual given a building's use.

- Available to run at the building level on the Summary Tab

- New! Expanded to include 8 new data quality alerts and is now available for any building type (as of 2/10/15).

- EPA currently scoping further tool enhancements to help tool users improve data quality. Development scheduled for 2015 and may include new approaches.

EPA

Tap into on-demand Portfolio Manager technical assistance

- Live and recorded webinars offered regularly

- Step-by-step training guides, FAQs, and technical reference documents, on-demand user support

www.energystar.gov/buildings/training