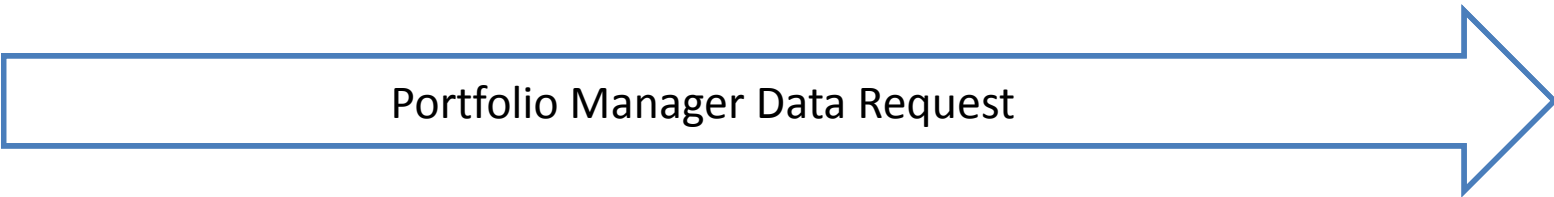


# New Data Quality Alerts in Portfolio Manager



## 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.



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 \(revised March 28, 2014\)](#)





## 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 ft<sup>2</sup>

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.

## 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.

The screenshot shows the 'Reporting' tab in the Portfolio Manager interface. At the top, there are navigation tabs: MyPortfolio, Sharing, Planning, Reporting (selected), and Recognition. Below the tabs, the 'Charts & Graphs' section features a 'Weather Normalized Site EUI' chart with a question: 'How much energy would be reported on my bills, under average weather conditions?'. To the right, the 'ENERGY STAR Performance Documents' section lists several documents: Statement of Energy Performance (SEP), Statement of Energy Design Intent (SEDI), Data Verification Checklist, Progress & Goals Report, and ENERGY STAR Score Card. Below this, the 'Templates & Reports (34)' section includes a 'Create a New Template' button and a red alert box with a warning icon: 'Your new response preview(s) has been generated, however basic metrics could not be calculated for one or more properties in the request. Read more'. At the bottom, a table lists data requests with columns for Name, Status, and Action.


Name	Status	Action
Data Request: Data Quality Report (Request from John Smith)	⚠️ Response Preview Generated: 1/22/2015 9:08 PM	I want to... [dropdown]



## 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	<a href="#">Portfolio Manager Store</a>	12/31/2014	The meter <a href="#">Electric Grid Meter</a> 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	<a href="#">Sample 1</a>	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	<a href="#">Sample 1</a>	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.





## 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

**What Would You Like To Do?**

 **I Want to Review/Edit these Properties**  
You can review individual properties/meters by using the links in the table above or [download it to Excel](#) in order to begin troubleshooting these issues.

 **I Thought I Fixed These Problems- I Want to [Generate an Updated Response](#)**  
If you have made changes to your data since your response was generated (01/21/2015 03:34 PM EST), you will need to re-generate the report in order for these changes to be reflected.

 **I Want to Submit Anyway**  
If you have verified that any issues listed in the table above are not the result of a mistake, you can continue submitting your response. Note that an incomplete request could be considered invalid or non-compliant by the requestor so it is strongly encouraged that you fix any issue before proceeding.

[Generate Updated Response](#)

[Send Response](#)

(You will confirm your response ...)



## 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.

The screenshot displays the Portfolio Manager interface with the following components:

- Navigation Tabs:** Summary (selected), Details, Meters, Goals, Design.
- Property Profile:** A text box stating "You haven't created a profile for your property yet. Profiles are a way to supplement the information in Portfolio Manager with additional information about your property, including a photo." with a "+ Create Profile" link.
- Source EUI Trend (kBtu/ft²):** A line graph showing a single data point at approximately 200 kBtu/ft² for the year 2013.
- Total GHG Emissions Trend (Metric Tons CO2e):** A line graph showing a single data point at approximately 800 Metric Tons CO2e for the year 2013.
- Notifications:** A box stating "You have no new notifications."
- Data Quality for this Property:** A section with the text: "The metrics that Portfolio Manager calculates depend on your [use details](#) and your energy bills. The data quality checker inspects the information you have entered to identify possible errors. If a property is shared with you as 'Read Only,' you will not be able to run the Data Quality Checker." Below this, it says "Date checker last run: N/A" and "Result: Not Checked" with a red exclamation mark icon and a "Run Check Now!" link. A blue "Check Data Quality" button is circled in red.
- Sharing this Property:** A section with "Shared with: 0 Contacts" and a "Share" button.
- More About Sharing:** A section with an information icon and text: "You haven't [shared your property](#) yet. Sharing can be helpful if you want to allow other people to view your property or help maintain or update information about it (e.g., property use details or meter data). You may also want to consider sharing with an organization who exchanges data to automatically update your meter information. [Learn more about exchanging data.](#)"
- Footer:** "Transfer Ownership" and "Download Property to Excel" links.





## Tap into on-demand Portfolio Manager technical assistance

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Get fact sheets, quick reference guides and other information about how the tools works.
- [Take or View a Training](#)  
Sign up for a session or view a recording on a wide variety of topics.
- [Search the Knowledge Base](#)  
Browse or search our Frequently Asked Questions.
- [Ask a Question](#)  
Send a question or comment to our staff.
- [Check the Glossary](#)  
Look up terms used throughout Portfolio Manager.
- [Web Service Documentation](#)  
If you exchange data via web services, check out the documentation or get email updates.

Don't forget, we're out there with you! Network with us and other folks who are using Portfolio Manager.

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