



# Multifamily Data Open House Series

*October 15<sup>th</sup>, 2014*



# Introduction

- Better Buildings Challenge Data Access Webinar for Multifamily Partners is available at <http://www4.eere.energy.gov/challenge/partners/multifamily>
- Feel free to either type in your data questions as we go or over the phone after the intro demo
- Resources available to Multifamily Partners
- Peer exchange is strongly encouraged!

# Agenda

- Review Individual Properties for Errors
- Pull Property Information and Data for Entire Portfolio
- Correct Errors or Add Data
- Open Q&A

# Portfolio Manager Requirements

- Complete Energy Data
  - 12 full calendar months
  - All fuels
  - All tenant & common areas
- Property Use Details
  - Gross Floor Area
  - Total Number of Residential Living Units
    - Number of units in a low-rise setting
    - Number of units in a mid-rise setting
    - Number of units in a high-rise setting
  - Total Number of Bedrooms
- Zip Code
  - For EPA to retrieve climate/weather details

*Required for 1-100  
ENERGY STAR score  
and certification:*

- 20+ units
- 12 months of whole-property data

# Review Individual Property Data


[Not eligible to apply for ENERGY STAR Certification](#)

**ENERGY STAR Score (1-100)**

**Current Score:** 73

**Baseline Score:** N/A

This metric cannot be calculated.

The Property Use Building Use does not have 12 full months of Gross Floor Area for the selected year. This may have happened if you edited your Use Details and changed the "effective date" of the Gross Floor Area. You can check the date(s) associated with your Gross Floor Area for each Property Use on the Details tab (click "View Update History").

**i** Due to the inter-dependency of many of the metric calculations, this list of reasons may not be complete. Therefore, it is possible that after you fix one issue, you may encounter a new list of issues.

[Close Explanation](#)

MF Test

1 Broad Street, Boulder, CO 7

Portfolio Manager Property ID: 1001

ENERGY STAR Score (1-100)

Current Score: 73

Baseline Score: N/A

Energy Performance

## Energy Meters (1)

[View as a Diagram](#)

[Add Another Meter](#)

Name	Energy Type	Most Recent Bill Date	Action
<a href="#">MF Test Electric</a>	Electric - Grid	09/01/2014	I want to...

**⚠ Data has gaps or overlaps.**

## Metrics Comparison for Your Property & Your Target

Metric	Baseline (Aug 2013)	Current (Aug 2014)	Target*	Median Property*
ENERGY STAR score (1-100)	<u>Not Available</u>	73	Not Set	50
Source EUI (kBtu/ft <sup>2</sup> )	Not Available	62.9	Not Set	73.6
Site EUI (kBtu/ft <sup>2</sup> )	Not Available	20.0	Not Set	23.4
Source Energy Use (kBtu)	15,776,345.6	15,717,053.8	Not Set	18,393,924.9
Site Energy Use (kBtu)	5,024,313.9	5,005,431.1	Not Set	5,857,937.2
Energy Cost (\$)	248,728.70	249,391.36	Not Set	291,866.69
Total GHG Emissions (Metric Tons CO <sub>2</sub> e)	827.2	824.1	Not Set	964.4

\* To compute the metrics at the target and median levels of performance, we will use the fuel mix associated with your property's current energy use.

# Data Quality Checker

Summary Details Meters Goals Design

### Property Profile

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.

[+ Create Profile](#)

### Source EUI Trend (kBtu/ft<sup>2</sup>)

Year	Source EUI (kBtu/ft <sup>2</sup> )
2010	
2011	
2012	
2013	
2014	
2015	65

### Notifications (0)

You have no new notifications.

### Data Quality for this Property

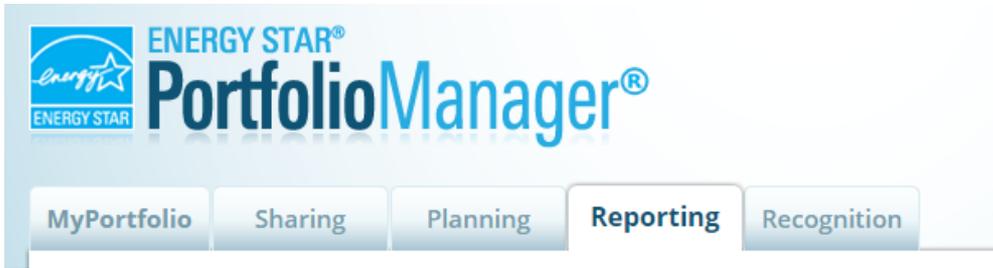
The metrics that Portfolio Manager calculates depend on your [use details](#) and your energy bills. The data quality checker inspects the information you have entered to identify possible errors. If a property is shared with you as "Read Only," you will not be able to run the Data Quality Checker.

Date checker last run: N/A

Result: Not Checked [! Run Check Now!](#)

[Check Data Quality](#)

# Pull Property Information and Data



## Templates & Reports (12)

[Create a New Template](#)

Name	Status	Action
BBC-Data-Export-12-13-DOE-BBC-	No Report Generated	I want to...
BBC-Data-Export-10-11-DOE-BBC-	No Report Generated	I want to...
BBC-Data-Export-08-09-DOE-BBC-	No Report Generated	I want to...
Emissions Performance	No Report Generated	I want to...
<u>Energy Performance</u>	No Report Generated	I want to...
Water Performance	No Report Generated	I want to...
Performance Highlights	No Report Generated	I want to...
Fuel Performance	No Report Generated	I want to...
<u>ENERGY STAR Certification Status</u>	No Report Generated	I want to...
Partner of the Year Report	No Report Generated	I want to...

# Pull Property Information and Data

## Create Energy Performance

In order to generate the spreadsheet, you will need to first select the timeframe of information to include as well as the properties from your account that you would like to see in the spreadsheet. Once you have done this, you will be able to generate your spreadsheet.

### 1 Select Timeframe of Information to Include

Timeframe: \*

Each property you include must have at least one complete year of data (12 full months) in order for metrics you select to be able to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report.

Timeframe: \*    with

Each property you include must have at least one complete year of data (12 full months) in order for metrics you select to be able to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report.

- Current Year
- Single Year
- Compare Two Years
- Compare Baseline Year
- Compare Current Year
- Current Year vs. Baseline Year

### 2 Select Properties to Include

Properties: \*

Properties: \*

- Select Number of Property(ies) -
- Select Number of Property(ies) -
- One Property
- Multiple Properties
- All Properties

### 3 Review Included Metrics

Metric Category	Metric Name
Property ID Numbers	Portfolio Manager Property ID
Property Information	Property Name
Property ID Numbers	Portfolio Manager Parent Property ID
Property Information	Parent Property Name
Property Information	City
Property Information	State/Province
Property Information	Postal Code
Property Information	Property Floor Area (Building(s))
Energy Performance Metrics	Site EUI
Energy Performance Metrics	Source EUI

[Generate Spreadsheet](#) [Cancel](#)

# Pull Property Information and Data

## Create a Report Template

Report templates provide you with an easy way to regularly access information and metrics. You can regularly prepare reports or graphs using Excel. You can also use your custom report template to collect data from other Portfolio Manager users. You can even share templates that you create with other people who may have similar needs with their properties.

### 1 Name Your Template

Name: \*   
Please provide a unique name for this template

### 2 Select Timeframe of Information to Include

Timeframe: \*   
Each property you include must have at least one complete year of data (12 full months) in order for metrics you select to be able to be calculated. If metrics cannot be calculated, "N/A" will be displayed in your report.

### 3 Select Properties to Include

Properties: \*

### 4 Select Information & Metrics to Include

Information & Metrics: \* **Select Information & Metrics** Selected items: 4

Save Template

Select Information & Metrics to Include Selected items: 4 of 50 maximum ([View Selection](#))

- Property Information
  - Property Name
  - Parent Property Name
  - Address 1
  - Address 2
  - City
  - County
  - State/Province
  - Postal Code
  - Country
  - Primary Property Type - Self Selected
  - Primary Property Type - EPA Calculated
  - National Median Reference Property Type
  - Property Floor Area (Buildings and Parking) (ft<sup>2</sup>)
  - Property Floor Area (Building(s)) (ft<sup>2</sup>)
  - Property Floor Area (Parking) (ft<sup>2</sup>)
  - Construction Status
  - Year Built
  - Number of Buildings
  - Occupancy
  - Property Notes
  - Third Party Certification
  - Third Party Certification Data Anticipated
- Property ID Numbers
- Property Use Details
- Energy Use by Fuel Source
- Data Accuracy
- Energy Performance Metrics
- Cost Performance Metrics
- Water Performance Metrics
- Greenhouse Gas Emissions
- Renewable Energy & Green Power
- ENERGY STAR Certification
- Property Design
- Target Metrics
- Sustainable Buildings Checklist

[Information & Metrics](#) Selected items: 4 of 50 maximum ([View Selection](#)) **Apply Selection** [Cancel](#)

# Correct Errors or Add Data

Summary **Details** Meters Goals Design

### Basic Information

[View/Edit all Details](#)

Construction Status:  
Existing

Federal Property:  
Not Set

[Find A Service & Product Provider \(SPP\):](#)  
Empty

Editing basic information also includes name, address, etc.

**Edit**

### Unique Identifiers (IDs)

Portfolio Manager ID:  
4178590

Standard IDs: None

Custom IDs: None

You can select from Portfolio Manager's Standard IDs to provide information to others in data requests. Or you can create up to three Custom IDs so that you can cross reference your property in other systems.

### Property Uses and Use Details

[View as Diagram](#) Add Another Type of Use  **Add**

Name	Primary Function	Gross Floor Area	Action	
▼ Building Use	Multifamily Housing	250000 ft²	I want to...	
		<b>Value</b>	<b>Current As Of</b>	<b>Correct Mistakes</b>
Gross Floor Area		250000 ft²	01/01/2013	No
Total Number of Residential Living Units	60 (default value)	01/01/2001	No	
Number of Residential Living Units in a Low-rise Setting (1-4 stories)	60 (default value)	01/01/2001	No	
Number of Residential Living Units in a Mid-rise Setting (5-9 stories)	0 (default value)	01/01/2001	No	
Number of Residential Living Units in a High-rise Setting (10 or more stories)	0			
Number of Bedrooms				

To add multiple uses to upload your information

I want to...  
I want to...  
Update with New Information  
View Update History  
Correct Mistakes  
Delete use

Summary Details **Meters** Goals Design

### Energy & Water Consumption

**Manage/Enter My Bills**

### Meters for Performance Metrics

**View/Edit Configuration**

### Energy Meters (1)

[View as Diagram](#) **Add Another Meter**

Name	Energy Type	Most Recent Bill Date	Action
<a href="#">MF Test Electric</a>	Electric - Grid	09/01/2014	I want to...

Data has gaps or overlaps.

# Portfolio Manager Demonstration

# Questions/Discussion

We will now open the phone lines. If you would prefer to send in your question, please type it directly in to the chat window.

Please try to limit background noise and do not put the call on hold if your line plays hold music. Thank you!

# Additional Information

- View ENERGY STAR frequently asked questions
  - [www.energystar.gov/buildingshelp](http://www.energystar.gov/buildingshelp)
- Take an ENERGY STAR Training
  - [www.energystar.gov/buildings/training](http://www.energystar.gov/buildings/training)
  - Step-by-step documents (PDF)
  - Links to live and recorded webinars
- View Past Recorded Trainings
  - <http://esbuildings.webex.com>
- Review Multifamily ENERGY STAR Score Technical Documentation
  - [https://www.energystar.gov/buildings/tools-and-resources/energy\\_star\\_score\\_multifamily\\_housing\\_united\\_states](https://www.energystar.gov/buildings/tools-and-resources/energy_star_score_multifamily_housing_united_states)

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