

ViewPoint Audit Creation & Submittal User Guide

Technology Services

This guide is here to help you with the entering of audits into ViewPoint. It provides an overview of key features along with step-by-step instructions to improve your experience and efficiency.

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1. Introduction

Welcome to ViewPoint Audit Creation

ViewPoint auditing will simplify audit management and tracking. You can search for jobs and monitor their progress using categories like: Ready to Audit, Scheduled, In Progress and Submitted, keeping you organized and connected with your Willdan Program Team.

2. Logging In

To access ViewPoint Auditing, you must first have access to ViewPoint with an Auditor account. If you already have one, proceed to Step 2.2. If you do not have an account, please contact your Willdan Program Team representative for assistance.

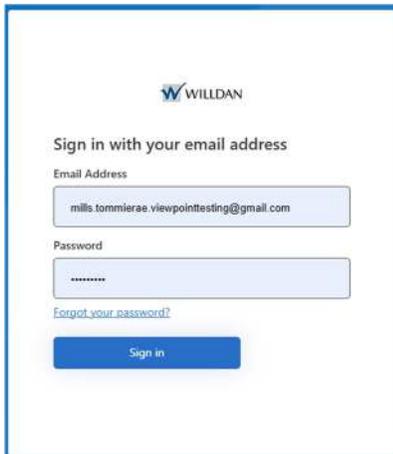
2.1 - Confirming Your Willdan-assigned Login

You can verify that your login works by visiting: <https://ladwp-landing.viewpointwilldan.com>.

2.2 - Accessing ViewPoint

After successfully verifying that your login works, proceed with the following steps:

1. Open your preferred browser.
2. Go to: <https://ladwp-landing.viewpointwilldan.com>
3. Log in using your Willdan-issued credentials:



The screenshot shows a web page for signing in. At the top center is the Willdan logo. Below it, the text reads "Sign in with your email address". There are two input fields: "Email Address" containing the text "mills.tommierae.viewpointesting@gmail.com" and "Password" containing a series of dots. Below the password field is a link that says "Forgot your password?". At the bottom of the form is a blue button labeled "Sign in".

Figure 1 – ViewPoint Willdan Sign In

Complete your login process by following any additional prompts, such as Two-Factor Authentication.

3. Default Dashboard

Upon logging in, you'll see the default **Dashboard** view. It's divided into four sections for easy access to all your job details.

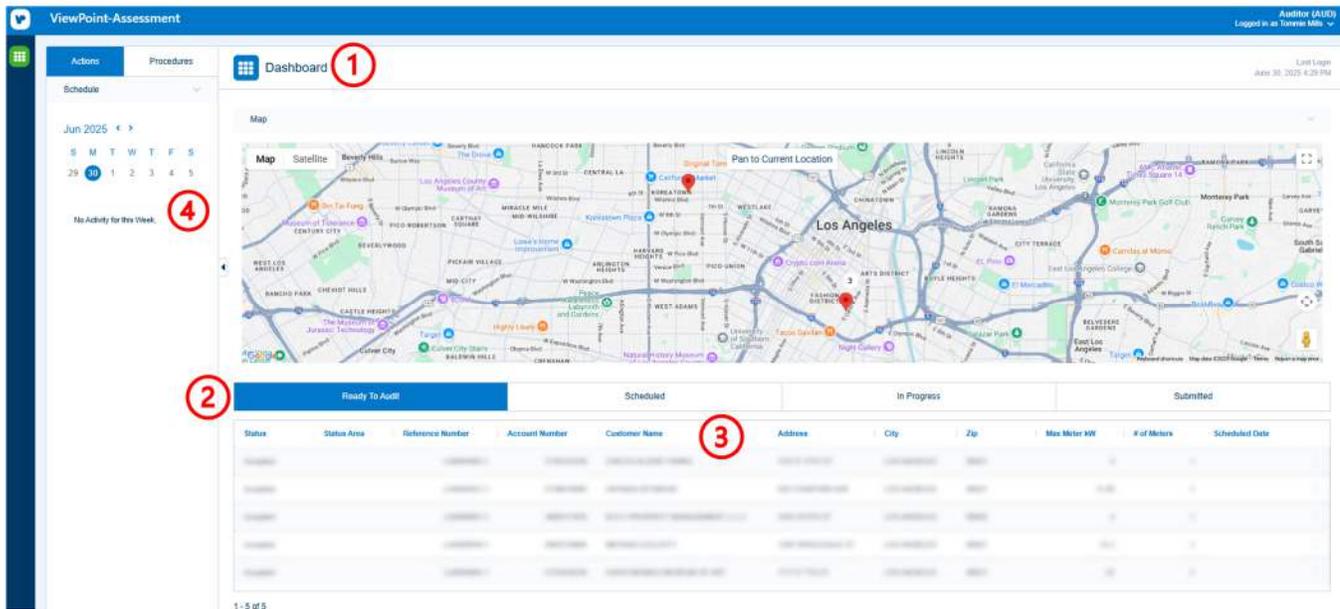


Figure 2 – Auditor Dashboard Default Screen – Four Sections of the Application List View

3.1 – Main Dashboard

The main dashboard is the default screen when logging into ViewPoint. You can return to the dashboard anytime by clicking on the green grid.



Figure 3 – Green Grid to return to Main Dashboard

3.2 – Audit States

Use the category tabs to filter by audit progress, such as Ready to Audit, Scheduled, In Progress or Submitted. When you select a category and perform a search, only items from that category will appear.



Figure 4 – Audit State – Ready to Audit, Scheduled, In Progress, Submitted

3.2.1 – Ready to Audit

This category includes all jobs that are assigned to you to perform an audit.

3.2.2 - Scheduled

It consists of jobs with the audit appointments scheduled.

3.2.3 – In Progress

Lists jobs marked as Installation Complete or Closed.

3.2.4 - Submitted

This is a list of all completed audits that have been submitted back to the program team.

3.3 – Filtering

All jobs may be filtered in the header row of each Audit State. To show or hide information in the Application List view, click the three lines and check or uncheck the boxes under the filters.

Status	Status Area	Reference Number	Account Number	Customer Name	Address	City	Zip	Max Meter kW	# of Meters	Scheduled Date
Accepted		LAD00001-2	00001000	M & L PROPERTY MANAGEMENT, L.L.C.	2424 W 5TH ST	LOS ANGELES	90020	<input type="text" value="Search..."/>	1	
Accepted		LAD00001-1	01000000	CHICALILAND YANNA	1107 E 17TH ST	LOS ANGELES	90021	<input checked="" type="checkbox"/> Select All <input checked="" type="checkbox"/> 90019 <input checked="" type="checkbox"/> 90021	1	
Accepted		LAD00001-2	01000000	ANTHONY STEINER	600 STANFORD AVE	LOS ANGELES	90021		1	
Accepted		LAD00001-1	00001000	MICHELLE ELIOTT	1200 WHOLESALE ST	LOS ANGELES	90021		1	
Accepted		LAD00001-1	01000000	SANTA MONICA MUSEUM OF ART	1117 E 17TH ST	LOS ANGELES	90021		00	0

1 - 5 of 5

Figure 5 – Audit List View – Filter View

Available viewing filters:

- **Status** – Allows filtering by Status. The following status' track the following states of audit.
 - i. **Accepted** – The audit has been excepted by your company and assigned to you to perform the audit.
 - ii. **Scheduled** – You have scheduled the audit.
 - iii. **In Progress** – You are performing the audit.
 - iv. **Submitted** – You have completed the audit and submitted to Willdan.
- **Status Area** – Will track the following attempts of performing the audit.
 - i. Attempt 1
 - ii. Attempt 2
 - iii. Final Attempt/Pending ESR Response
 - iv. Rejected

- **Reference Number** – Allows filtering by the Willdan reference number for the site.
- **Account Number** – Allows filtering by the end customer account number.
- **Customer Name** – Allows filtering by end customer account name.
- **Address** – Allows filtering results to show the service address of the end-customer.
- **City** – Allows filtering results by City
- **Zip** – Allows filtering results by Zip
- **Max Meter KW** – Allows filtering results by Max Meter KW
- **# of Meters** – Allows filtering by # of meters
- **Scheduled Date** – Allows filtering by date of scheduled audit appointments.

3.4 – Calendar

A calendar is a valuable tool for tracking scheduled audits and ensuring no appointments are missed. By allocating specific time slots for each location, it supports effective time management and efficient planning. The ability to toggle between weeks allows for a clear overview of scheduled appointments, which aids in preparation and helps maintain a consistent audit schedule. This is visible from your dashboard in the upper left corner.

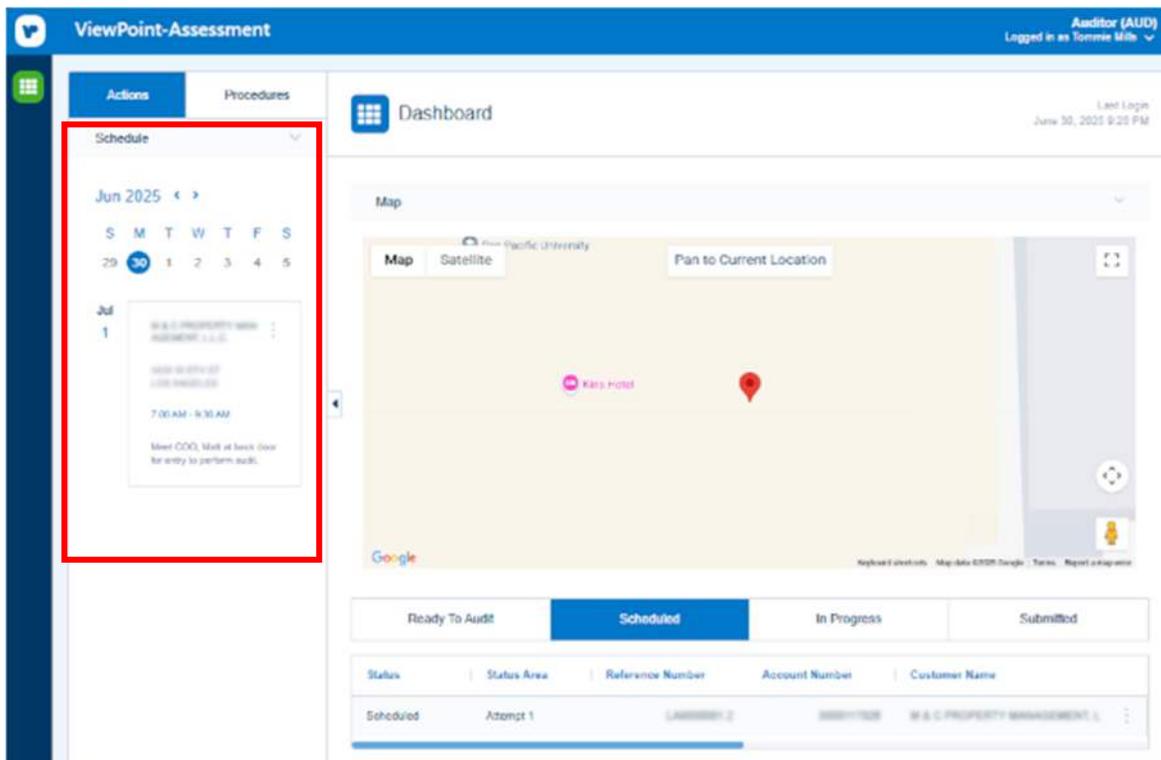


Figure 6 – Calendar of Scheduled Audits

3.4.1 – Scheduling an Audit in Calendar

1. Click on the three dots and select Add to calendar.

Status	Status Area	Reference Number	Account Number	Customer Name	Address	City	
Accepted							View Audit Add to Calendar View Notes
Accepted							
Accepted							

Figure 7 – Scheduling an Audit in Calendar - Add to Calendar

2. A pop up window will open for you to enter the audit appointment details. The note section is a great place for reminders that have site specific information. Once details are entered, click **Schedule** to proceed.

Add to Calendar
×


Add to Calendar

*** Schedule Date:**

*** Start Time:**

*** End Time:**

Note

For entry go to side door.

Figure 8 – Scheduling an Audit in Calendar – Add to Calendar Audit Appointment Details

3. Your scheduled audit appointment now appears in your Calendar Schedule.

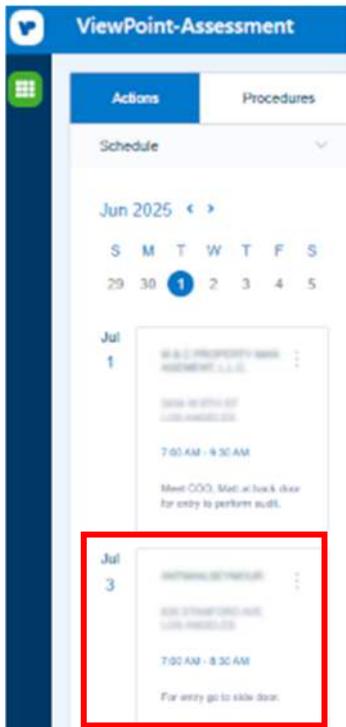


Figure 9 – Scheduling an Audit in Calendar – Audit Appointment Scheduled

3.4.2 – Scheduling an Audit under Assessment

1. Click on the three dots and select View Audit.

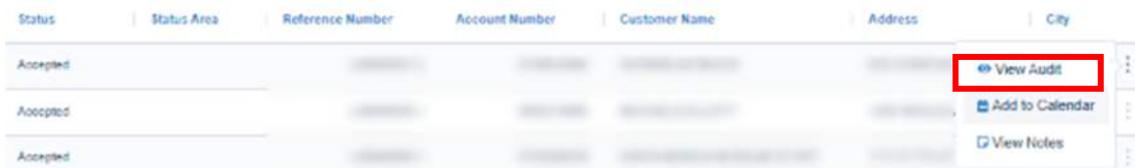


Figure 10 – Scheduling an Audit under Assessment – View Audit

2. Once in the Audit Screen click the green plus sign next to Audits.

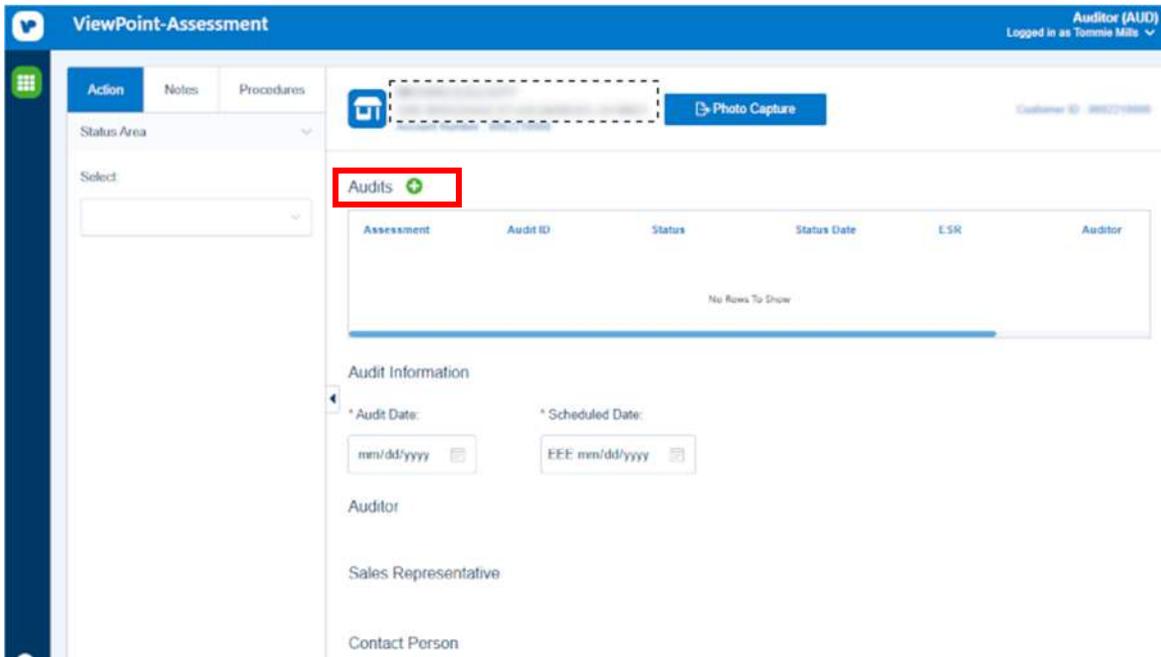


Figure 11 – Scheduling an Audit under Assessment – Audits

3. Enter Scheduled Date

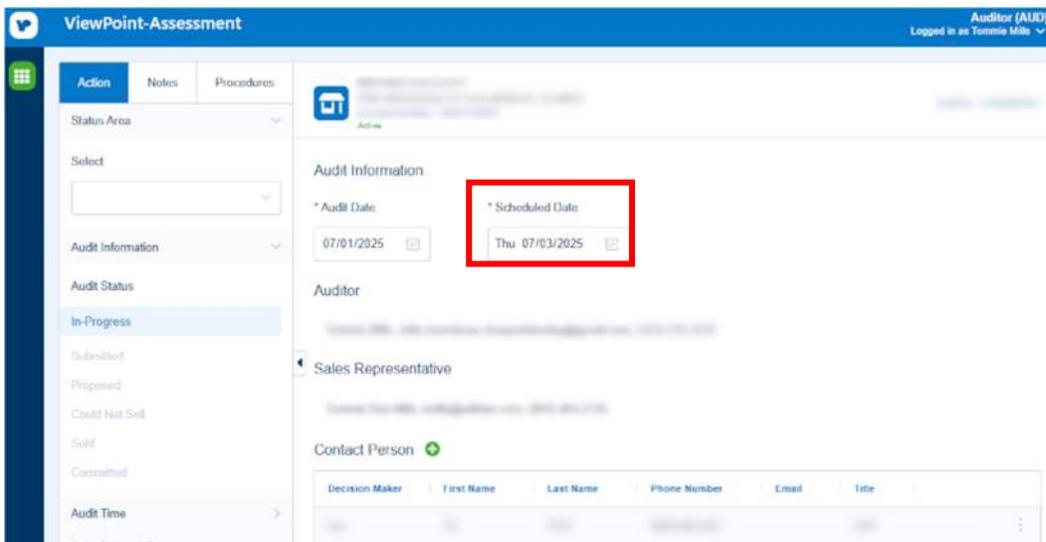


Figure 12 – Scheduling an Audit under Assessment – Scheduled Date

4. Building an Audit

The first step to building an audit is the same as steps 1-3 in Section 3.4.2. The Audit Date will automatically default to the day audit is entered. If the audit was performed on a day prior to entering the audit into ViewPoint please update the date to the date the audit was performed. Scroll to the end of the page and **Save**.

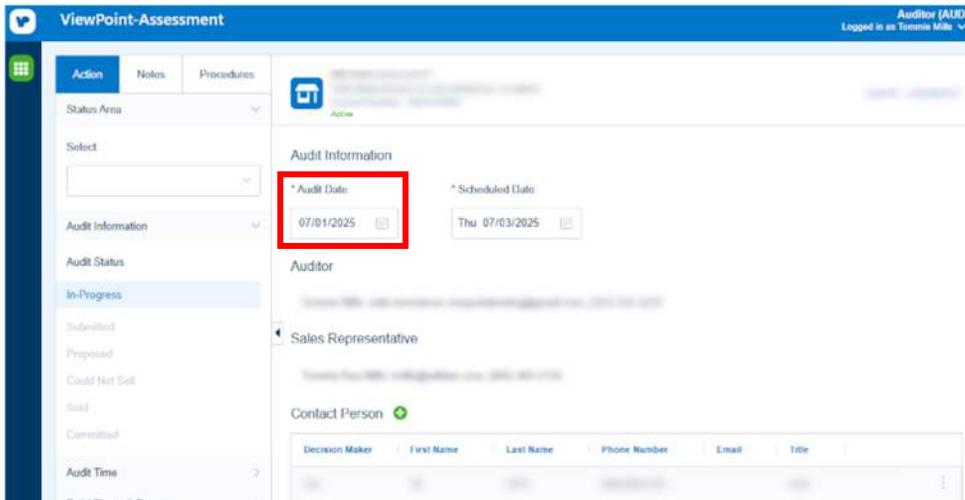


Figure 13 – Building an Audit – Audit Date

4.1 – Building Floors & Rooms

On the left side of your screen in the Action tab, select Build Floors & Rooms and enter the default ceiling height and weekly hours.

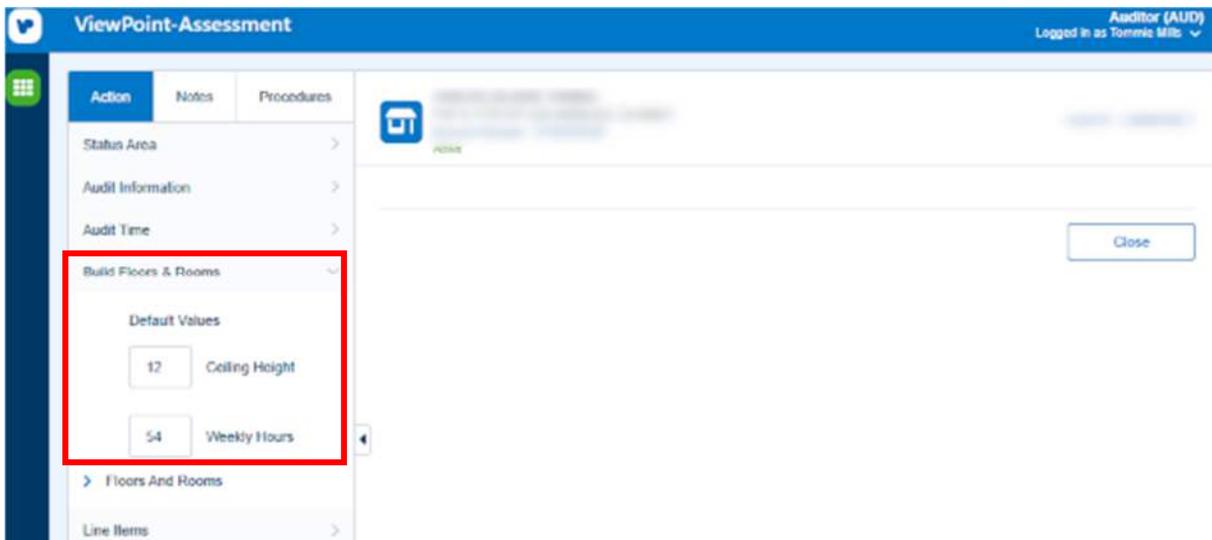


Figure 14 – Building an Audit – Building Floors & Rooms

Note: Constructing the facility's floors and rooms may be completed either simultaneously or in phases.

4.1.1 – Adding a Floor

1. Click on Floors and Rooms and select Add Floor

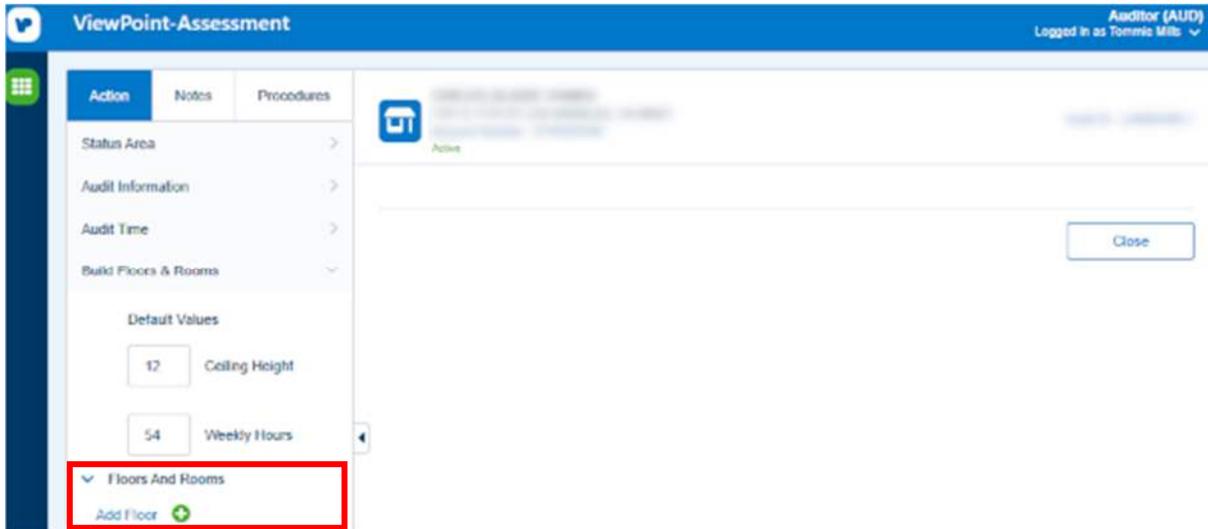


Figure 15 – Building an Audit – Adding Floor

2. The window below will appear. Enter Floor Name and Save.

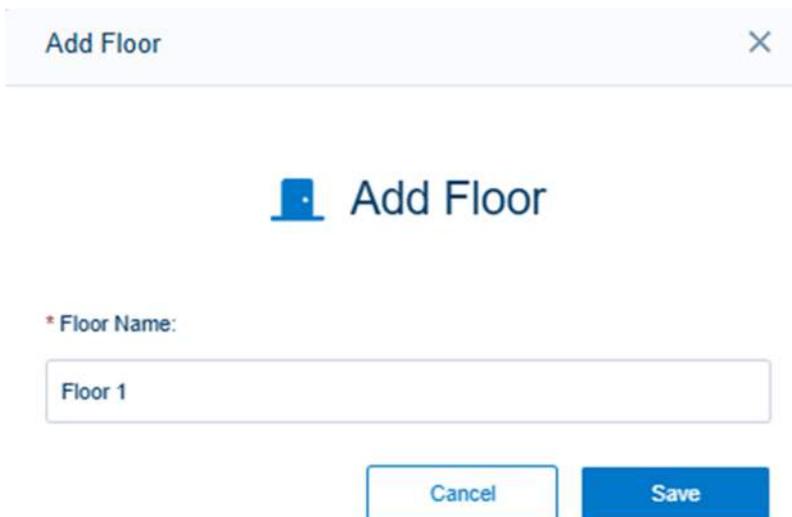


Figure 16 – Building an Audit – Adding Floor Name

3. To add additional floors, repeat steps 1 and 2.

4.1.2 – Adding a Room

1. Click on the Floor that you would like to add a room for and select Add Room. In the example below, Floor 1 is selected, and a room will be added to this floor.

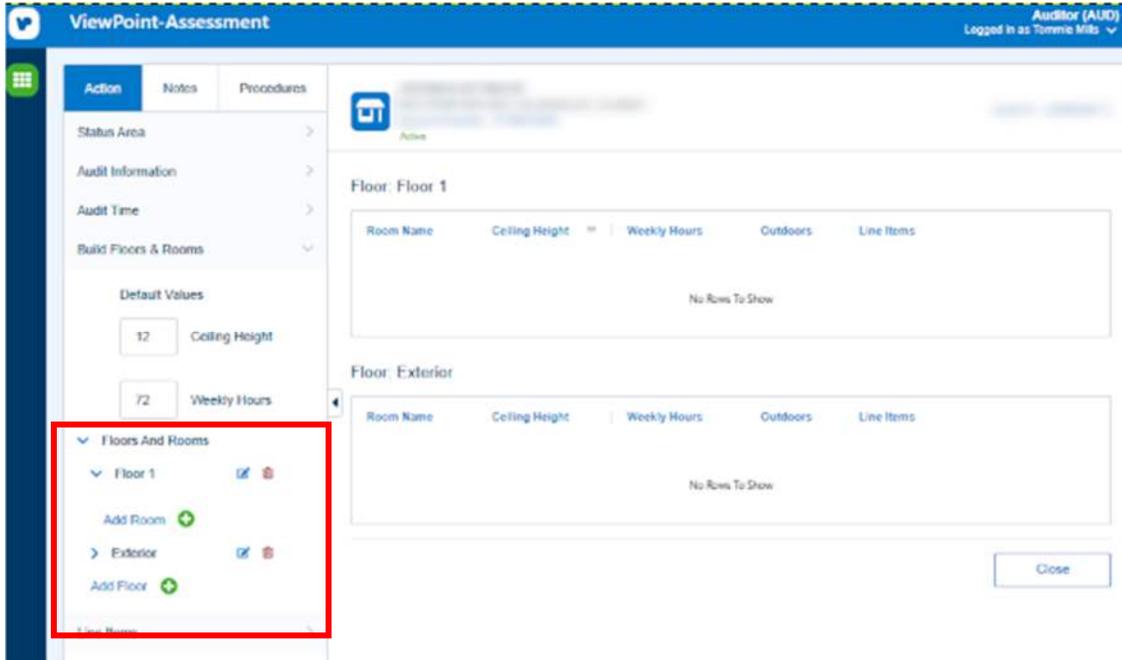


Figure 17 – Building an Audit – Adding a Room

2. The window to the right will appear. Enter Room Name and select if the room is one of the following: Air Conditioned, Not Air Conditioned, Outdoor. Note: default values for Ceiling Height and Weekly Hours will auto populate. If the Ceiling Height or Weekly Hours are different for this room they can be changed at this time. Once all information is noted, click Save.

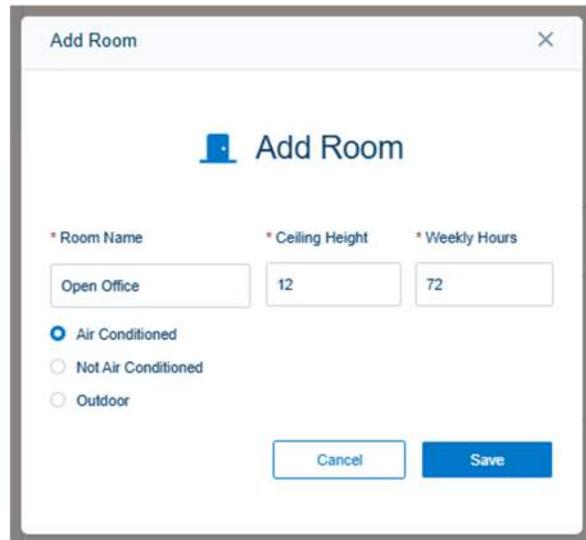


Figure 15 – Building an Audit – Adding Room Details

3. Once the Room has been successfully added it will appear on the Floor it was added to.

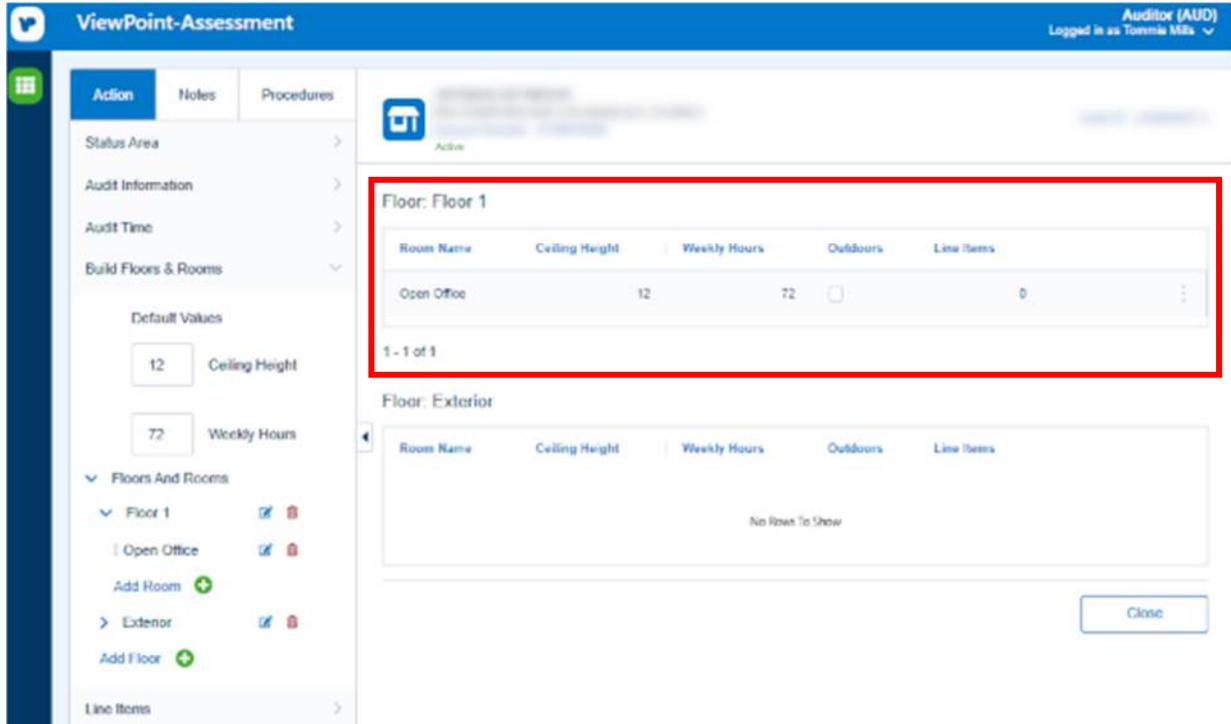


Figure 18 – Building an Audit – Built Room

4.2 – Adding Line Items

Now that the Floors and Rooms are ready you can start adding Line Items to the Audit. To begin with the Room that you want to add the Line-Item in. For this example, the Room Open Office is selected.

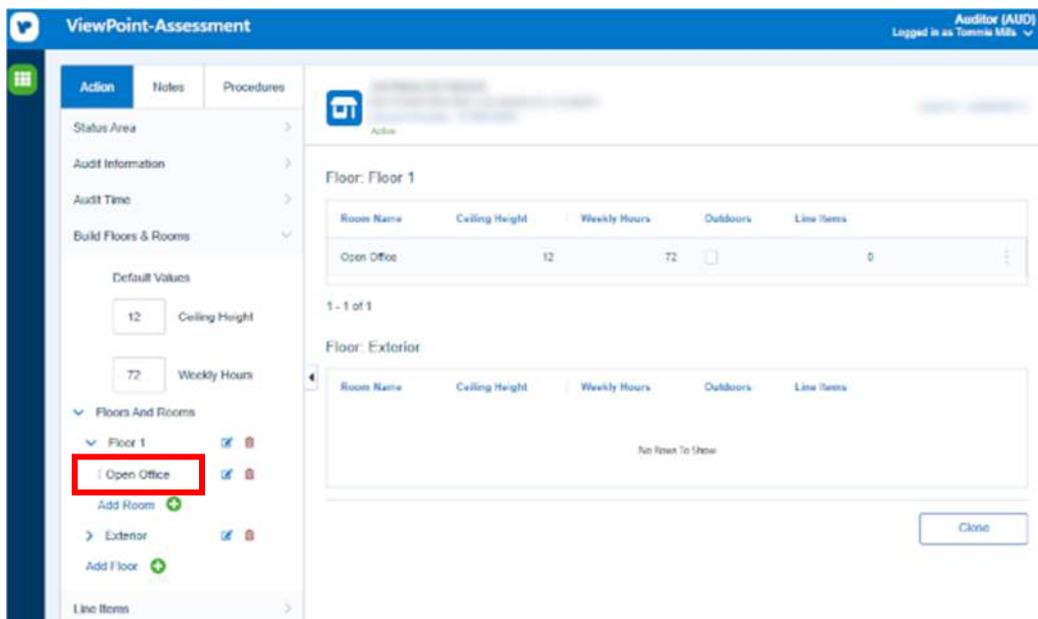


Figure 19 – Building an Audit – Selecting Room

Once you click on the Room your view will change to show you the Floor and Room along with the ability to now select Add Line Items. Click on Add Line Items.

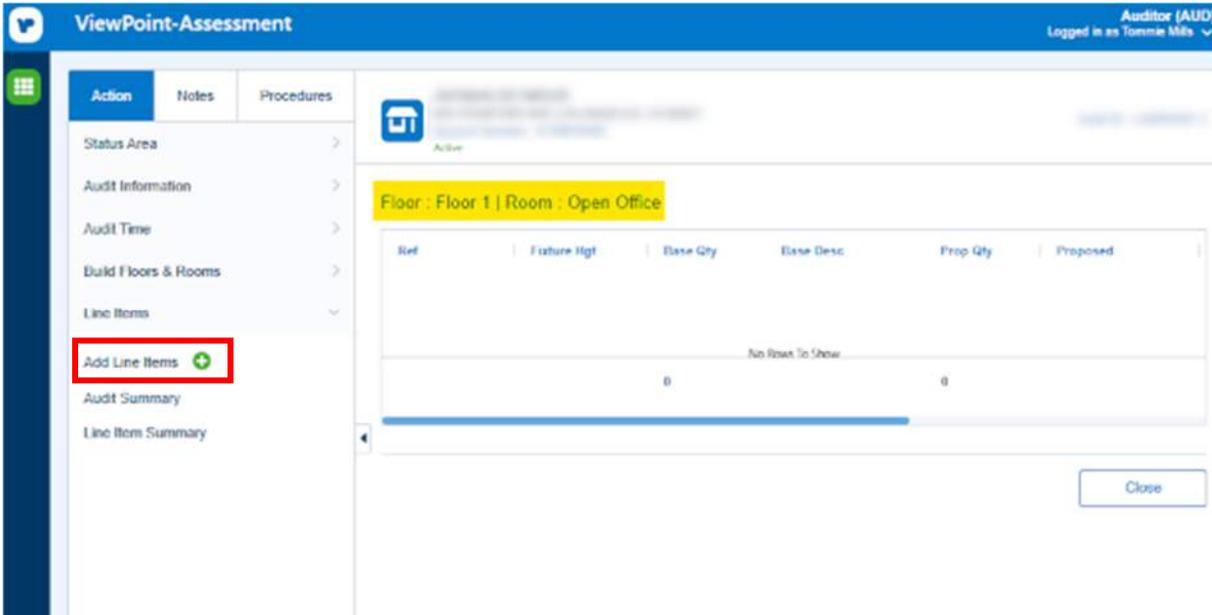


Figure 20 – Building an Audit – Add Line Items

4.2.1 – Measure Type

Select Measure Type. There are four Measure Types to choose from. They are:

1. Water
2. Lighting
3. Refrigeration
4. Non-ECM



Figure 21 – Building an Audit – Measure Type

4.2.2 – Technology Type

Select Technology Type. Measure Types 1-3 above will each have their own Technology Type list to select from.

1. Water

- a. Faucet
- b. Hot Water Pipe
- c. Toilet
- d. Pre-Rinse Spray Valve
- e. Shower Head
- f. Tank Hot Water Heater

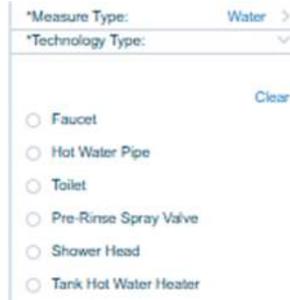


Figure 22 – Building an Audit – Technology Type – Water

2. Lighting

- a. Compact Fluorescent
- b. Exit Lighting
- c. Fluorescent
- d. Halogen Quartz
- e. Halogen
- f. High Intensity Discharge
- g. Incandescent
- h. Linear LED (Type A)
- i. Linear LED (Type B)
- j. Linear LED (Type C)
- k. High Pressure Sodium
- l. Low Pressure Sodium
- m. Mercury Vapor
- n. Metal Halide
- o. LED Lighting
- p. LED Lighting with Control
- q. Room Control
- r. Fluorescent w/ Control
- s. Lighting Control

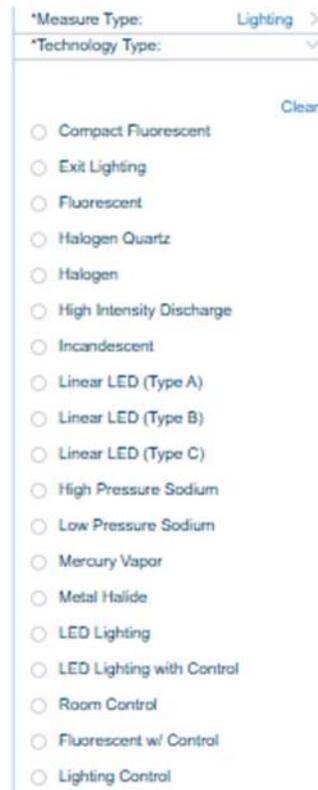


Figure 23 – Building an Audit – Technology Type – Lighting

- 3. Refrigeration
 - a. Motor
 - b. Case Lighting
 - c. Autocloser

*Measure Type: Refrigeration >

*Technology Type: >

Clear

Motor

Case Lighting

Autocloser

Figure 24 – Building an Audit – Technology Type – Refrigeration

4. Non-ECM

4.2.3 – Technology Type Detail Selections

Once you have selected the Technology Type you will go through and select the known details for the Technology Type selected.

ViewPoint Assessment

Logged in as Theresa Mills

Action Notes Procedures

Station Area >

Audit Information >

Audit Type >

Build Floors & Rooms >

Live Areas >

Find Base Condition >

Clear All

Measure Type: Lighting >

*Technology Type: Fluorescent >

*Fixture Type: >

Recessed Lensed Troffer >

Ballast Count: >

Ballast Power: Reduced >

Ballast Type: >

Energy Saving Electronic >

Fixture Code: >

Fixture Length: 4 Ft >

Fixture Wattage: >

Lamp Base: >

Lamp Diameter: >

Lamp Length: 4 Ft >

Lamp Quantity: 4 >

Lamp Wattage: 32 >

Location

Floor: Floor 1

* Room: Open Office * Ceiling Height: 12 * Weekly Hours: 72

Air Conditioned Not Air Conditioned Outdoor

Base Condition * Fixture Height: 12 * QTY: 0

Showing 7 results

Proposed * Fixture Height: 12 QTY: 0

Showing 2 results

Notes

Cancel Save

Figure 25 – Building an Audit – Technology Type – Detail Selection

4.2.4 – Base Condition

After the details of the Technology Type are selected, the Base Condition will narrow down to available options. Select Base Condition and note Base Condition QTY.

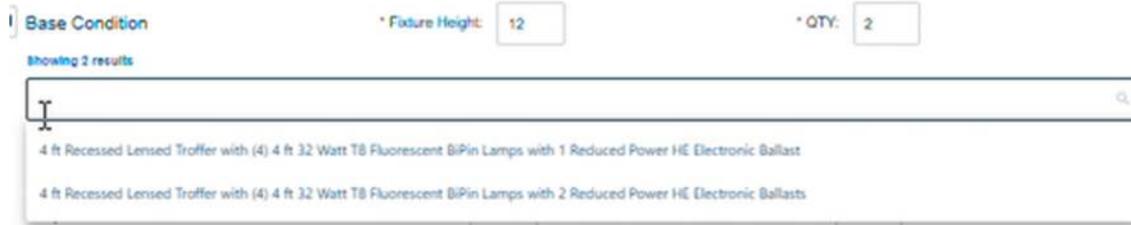


Figure 26 – Building an Audit – Technology Type – Base Condition Selection

4.2.5 – Proposed Condition

Select Proposed Condition from drop down menu.



Figure 27 – Building an Audit – Technology Type – Proposed Condition Selection

4.2.6 – Material Selection

Select Material for the Proposed Condition.



Figure 28 – Building an Audit – Technology Type – Material Selection

4.2.7 – Add Accessory

If an accessory needs to be added select Add Accessory. Note accessory options will vary as it depends on the Proposed Condition. Choose Accessory and note quantity. Examples below reflect two different Proposed Condition Accessory options.

Add Accessory



Emergency Battery Backup - EVO Kit with Test Switch *QTY: 0

Figure 29 – Building an Audit – Technology Type – Add Accessory Example 1

Add Accessory



Adjustable Knuckle - Pole Mount : 4

Adjustable knuckle - Pole Mount *QTY: 4

Adjustable knuckle - Trunnion Mount *QTY: 0

Adjustable Knuckle - Slip Fitter *QTY: 0

Figure 30 – Building an Audit – Technology Type – Add Accessory Example 2

4.2.8 – Notes

Any notes related to the line item being entered should be added in the Notes section of the line item.

Notes



Figure 31 – Building an Audit – Technology Type – Line-Item Notes

4.2.8 – Line-Item Summary

The Line-Item Summary is available anytime while inputting the Audit.

1. Click Line-Item Summary on the Left side of screen.

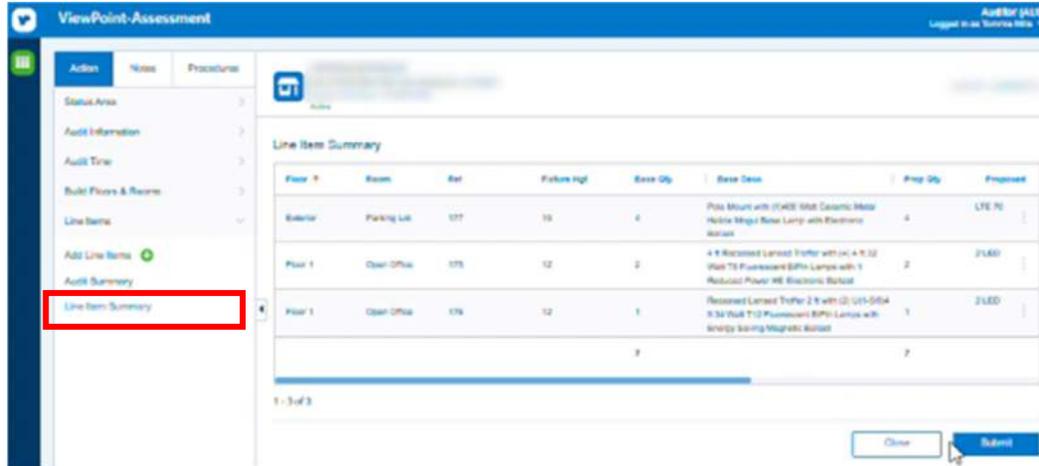


Figure 32 – Building an Audit – Technology Type – Line-Item Summary

2. A complete list of entered Audit Line-Items will be able to be reviewed on the right side.

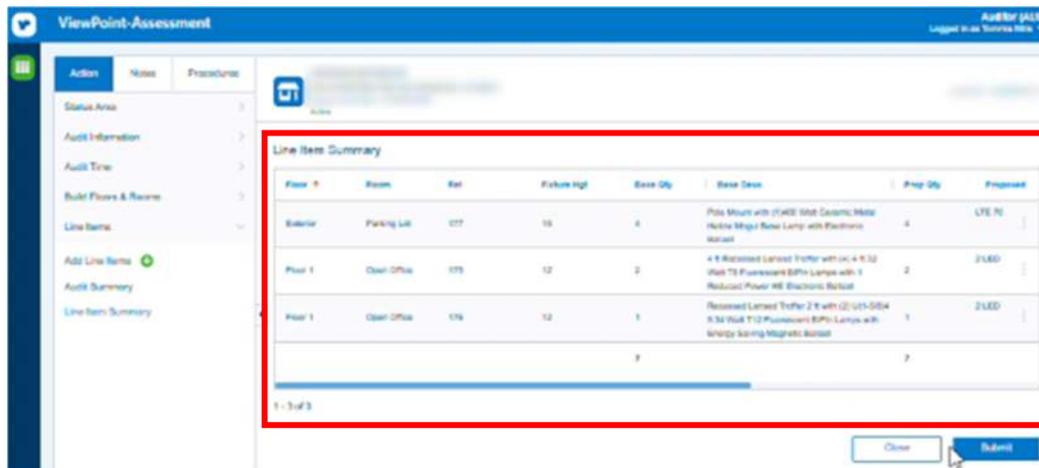


Figure 33 – Building an Audit – Technology Type – Line-Item Summary Detail

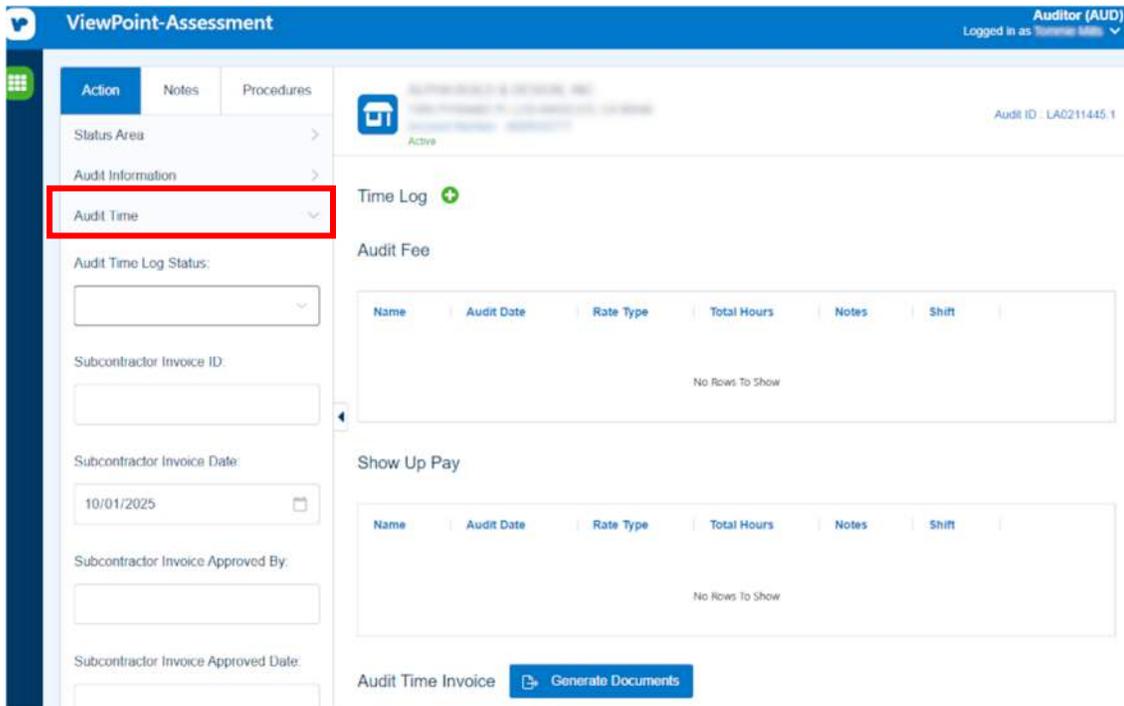
4.3 – Submitting Audit

Now that all Line-Items are entered it is time to Submit the audit to the Willdan Program Team.

4.3.1 – Audit Time Log

An Audit Time Log must be entered prior to submitting an Audit.

1. Click on Audit Time.



The screenshot displays the 'ViewPoint-Assessment' software interface. The top navigation bar includes the title 'ViewPoint-Assessment' and the user 'Auditor (AUD) Logged in as Summer Mills'. A sidebar menu on the left contains several options: 'Action', 'Notes', 'Procedures', 'Status Area', 'Audit Information', and 'Audit Time'. The 'Audit Time' option is highlighted with a red rectangular border. The main content area shows a 'Time Log' section with a green plus icon, an 'Audit Fee' section with a table header (Name, Audit Date, Rate Type, Total Hours, Notes, Shift) and 'No Rows To Show', and a 'Show Up Pay' section with a similar table header and 'No Rows To Show'. At the bottom, there is an 'Audit Time Invoice' section with a 'Generate Documents' button.

Figure 34 – Audit Time Log – Audit Time

2. Click on the Time Log Green Plus button

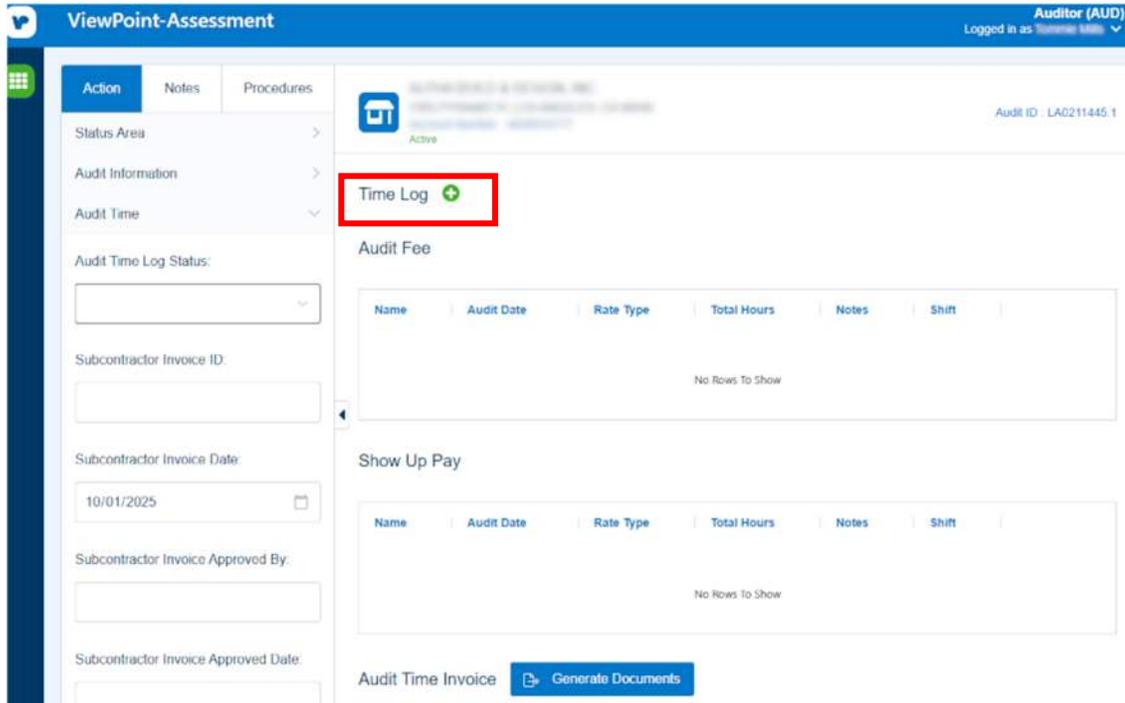


Figure 35 – Audit Time Log – Time Log

3. A pop-up window will appear.

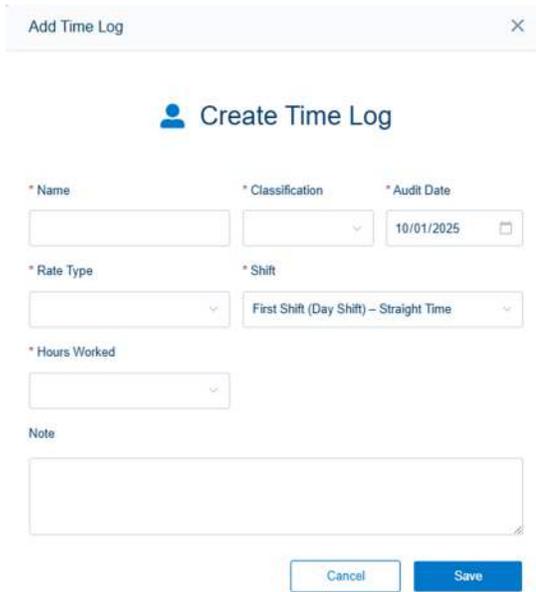
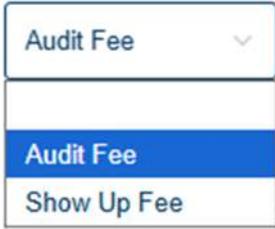


Figure 35 – Audit Time Log – Create Time Log

Enter the following required information and Save.

- a. Name
- b. Classification – select from the drop-down menu

*** Classification**



- i.

Figure 36 – Audit Time Log – Classification drop-down menu

- c. Audit Date

- d. Rate Type – Select from the drop-down menu

* Rate Type



▼
Journeyman
Apprentice Period 1, 1st Year
Apprentice Period 2, 1st Year
Apprentice Period 3, 2nd Year
Apprentice Period 4, 2nd Year
Apprentice Period 5, 3rd Year
Apprentice Period 6, 3rd Year
Apprentice Period 7, 4th Year
Apprentice Period 8, 4th Year
Apprentice Period 9, 5th Year
Apprentice Period 10, 5th Year

i.

Figure 37 – Audit Time Log – Rate Type drop-down menu

- e. Shift – will default to First Shift (Day Shift)-Straight Time with the ability to select a different shift from the drop-down menu if needed.

* Shift



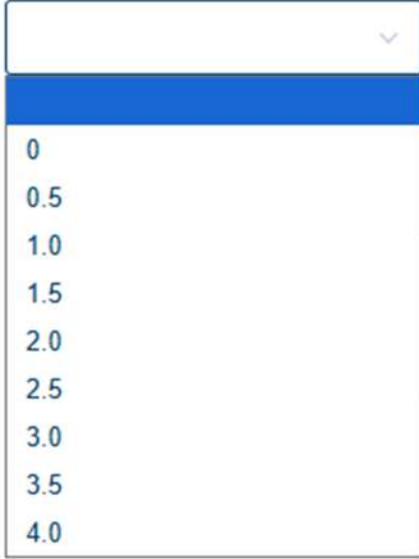
First Shift (Day Shift) – Straight Time ▼
First Shift (Day Shift) – Straight Time
Second Shift (Swing Shift) – Straight Time
Third Shift (Graveyard Shift) – Straight Time

i.

Figure 38 – Audit Time Log – Shift drop-down menu

f. Hours Worked – select time from the drop-down menu

* Hours Worked

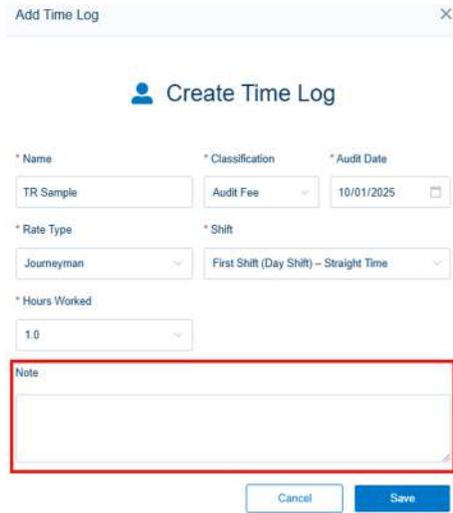


A drop-down menu for 'Hours Worked' is shown. The menu is open, displaying a list of numerical options from 0 to 4.0 in increments of 0.5. The top of the menu is highlighted in blue.

0
0.5
1.0
1.5
2.0
2.5
3.0
3.5
4.0

Figure 39 – Audit Time Log – Hours Worked drop-down menu

g. Notes – enter any applicable notes in the Note field



The 'Add Time Log' form is shown. It includes fields for Name, Classification, Audit Date, Rate Type, Shift, and Hours Worked. The Note field is highlighted with a red border.

Create Time Log

* Name	* Classification	* Audit Date
TR Sample	Audit Fee	10/01/2025
* Rate Type	* Shift	
Journeyman	First Shift (Day Shift) – Straight Time	
* Hours Worked		
1.0		
Note		

Cancel Save

Figure 40 – Audit Time Log – Note

- Upon successful entry of time, a green notification will appear in the top right corner of the screen. In addition, the time entered will now appear under Audit Fee.

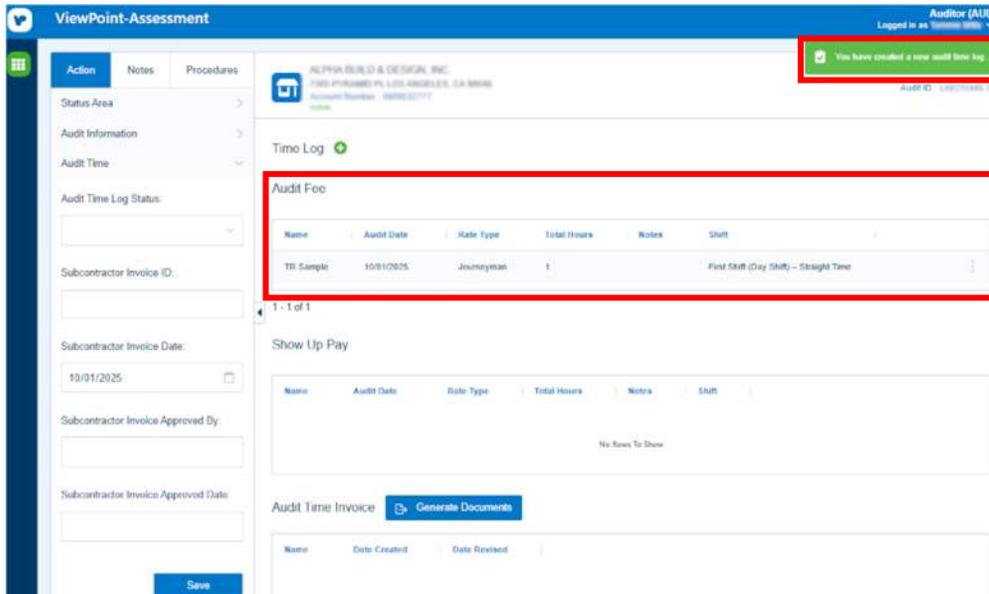


Figure 41 – Audit Time Log – Successful Time Entry

4.3.2 – Create Audit Invoice

Before submitting the audit, an audit invoice must be generated, uploaded, and approved by CCSR. The Auditor and Contractor Customer Service Roles can create an audit invoice.

***Auditors must confirm with their administration team before proceeding.**

To begin:

1. Navigate to the *Action* tab.
2. Log a *Subcontractor Invoice ID*.
 - i. This field is editable.
 - ii. If the invoice number is not yet available, click the Save button — the system will automatically populate a placeholder Invoice ID, which can be updated later if needed.
3. Once the *Subcontractor Invoice ID* is recorded:
 - i. Go to Audit Time Invoice.
 - ii. Click the Generate Documents button to create the necessary invoice documentation.

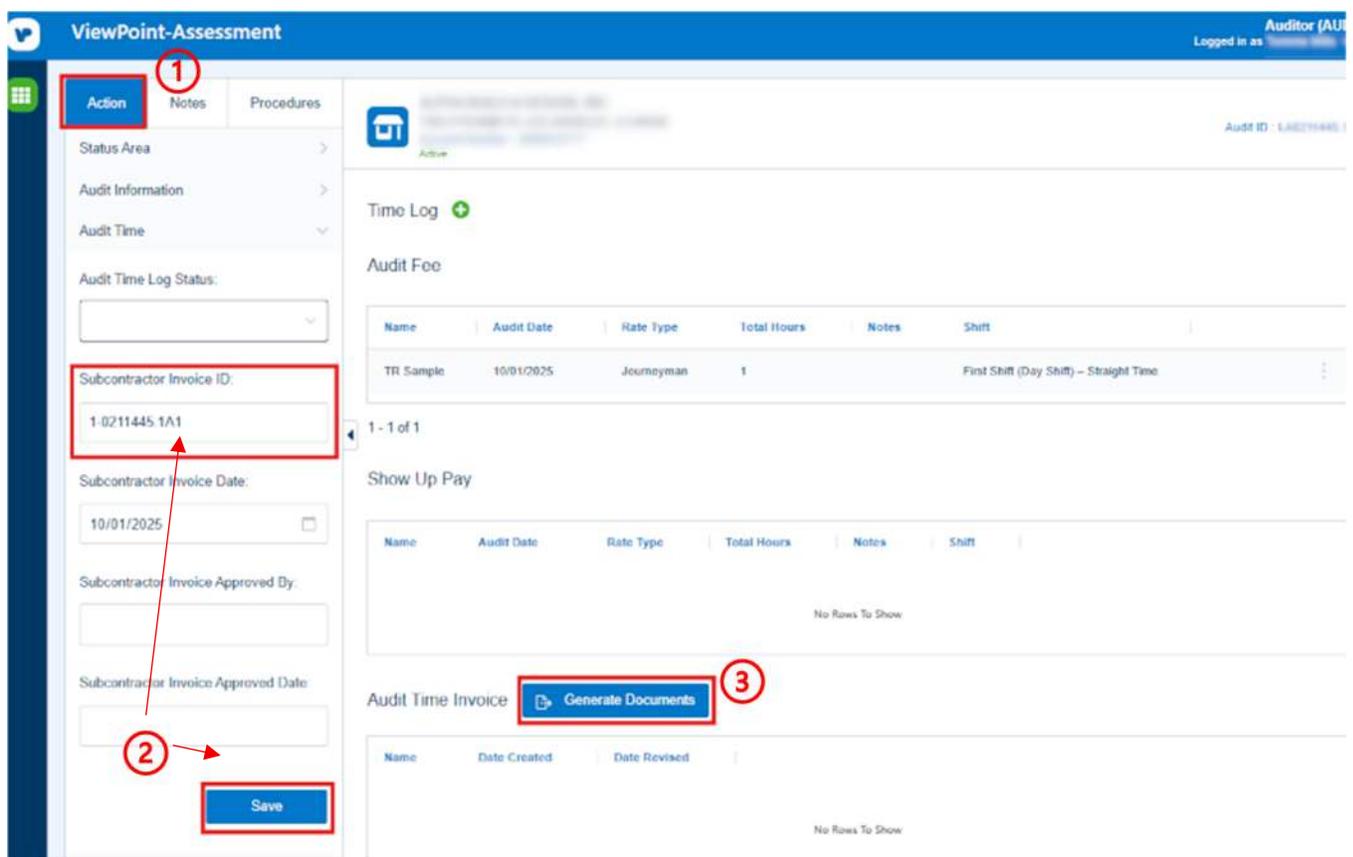


Figure 42 – Create Audit Invoice – Generate Invoice

When the Audit Time Invoice has been successfully generated:

- A green notification box will appear in the upper right corner
- The generated document will also be displayed in the Audit Time Invoice section.

The screenshot shows the 'ViewPoint-Assessment' interface. On the left is a navigation sidebar with sections like 'Status Area', 'Audit Information', and 'Audit Time'. The main area is titled 'Audit Time Invoice' and contains a 'Generate Documents' button. Below this button is a table with the following data:

Name	Date Created	Date Revised
LA0211445_1_Subcontractor Audit Invoice (Pe...	10/01/2025	

At the top right of the interface, a green notification box displays the message 'Time Log Invoice Generated...'.

Figure 43 – Create Audit Invoice – Invoice Generated

4.3.3 – Submit Audit Invoice & Audit

Now that the invoice has been successfully generated in section 4.3.2 we will proceed with the process of submitting both the audit invoice and the audit. ****This section covers the process for CCSR roles for audit invoice and audit submission.***

1. Navigate to the Home Panel on the left and select Customer Search.

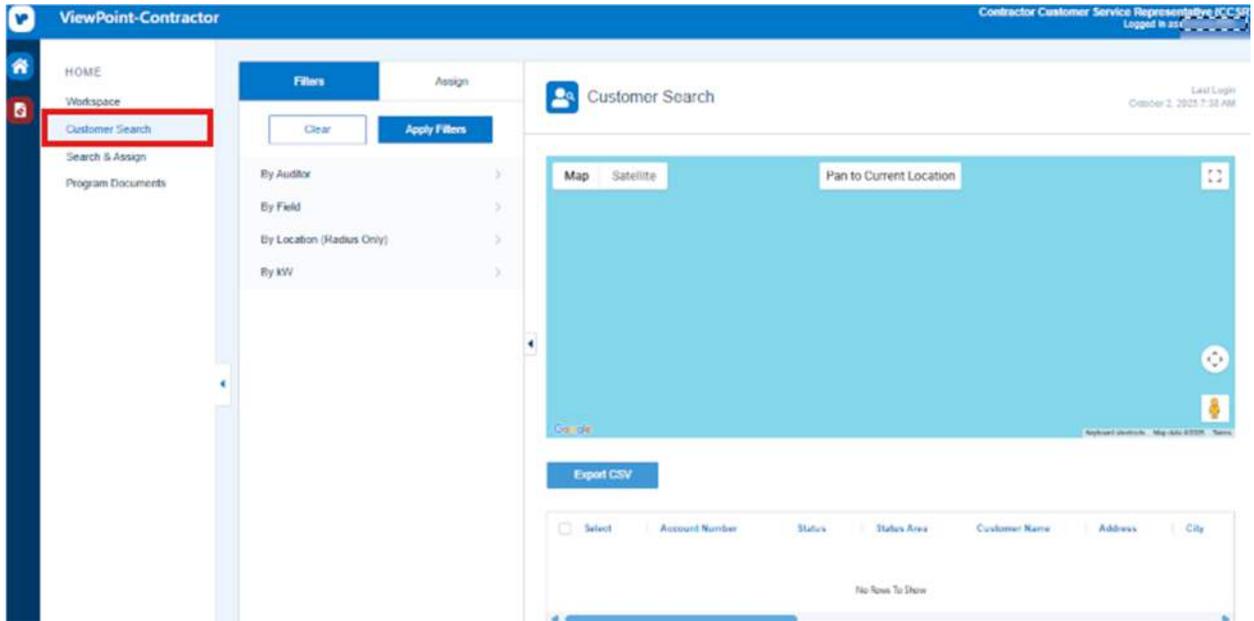


Figure 44 – Create Audit Invoice – Customer Search

2. Click to search By Field

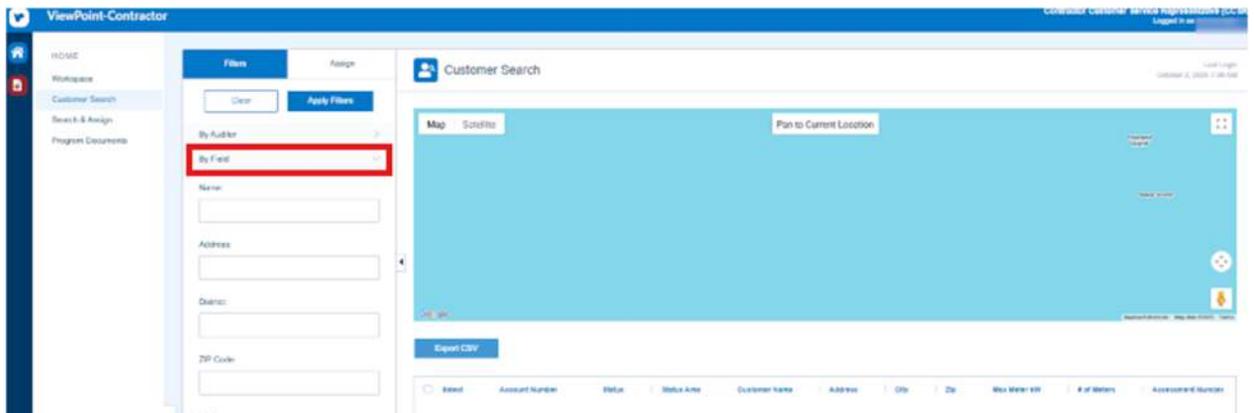


Figure 45 – Create Audit Invoice – By Field

3. Search by Audit Status: In-Progress

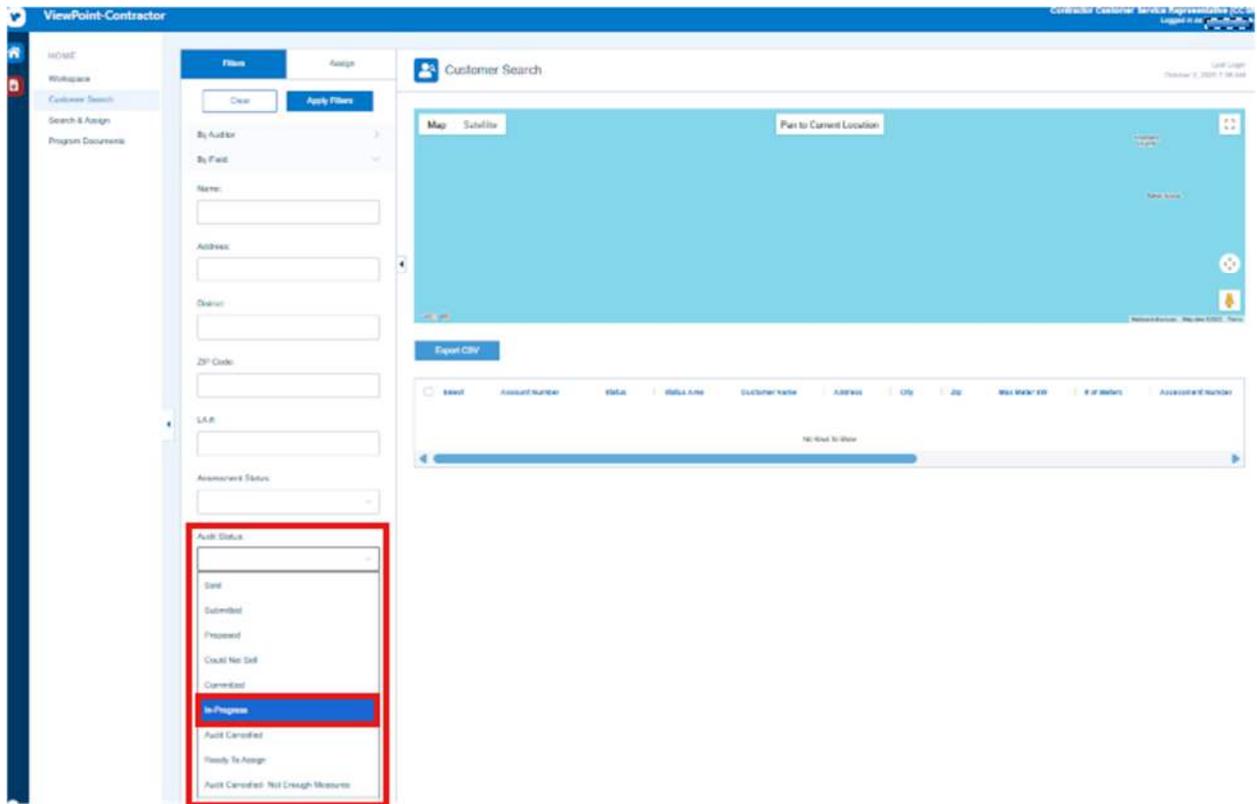


Figure 46 – Create Audit Invoice – Audit Status: In-Progress

4. Click Apply Filters. On right hand side a list of all In-Progress audits will be visible.

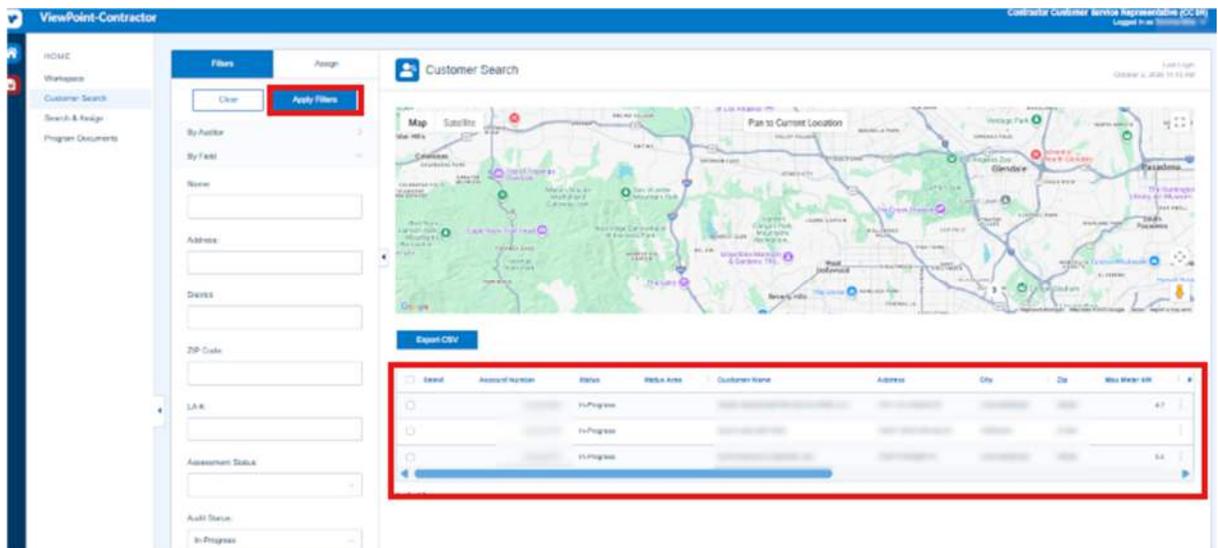


Figure 47 – Create Audit Invoice – Apply Filters & Filtering Results

- Navigate the audit list and locate the specific audit an invoice will be prepared for, click the ellipsis icon and select View Customer.

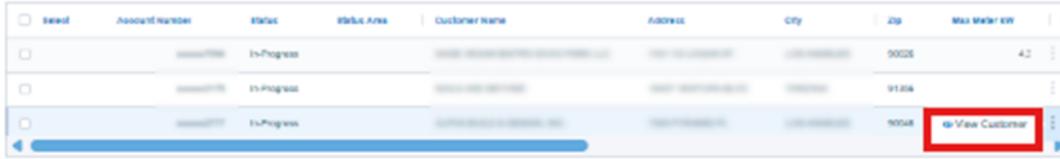


Figure 48 – Create Audit Invoice – View Customer

- The default view will be the Account Tab. Click on the Audit Tab at the Top of the Screen

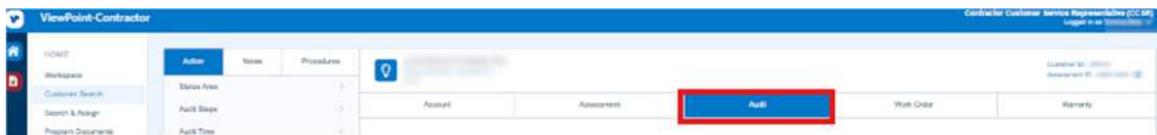


Figure 48 – Create Audit Invoice – Audit Tab

- In the Action panel on the left-hand side if adjustments are needed to the auto-generated invoice number, update now by following steps in [4.3.2](#).
- Navigate to the ellipsis on the right side of the invoice entry and select view to open document.



Figure 44 – Submit Invoice & Audit – Opening Audit Invoice

9. The Audit Time Log Invoice will pop-up
 - i. Verify that all information is accurate.



Figure 45 – Submit Invoice & Audit – Viewing/Downloading Invoice

10. Download the invoice to your device for submission and recordkeeping.
11. Click on the Audit Tab at the Top of the Screen to reset the view. Then navigate to the Supporting Documents section.

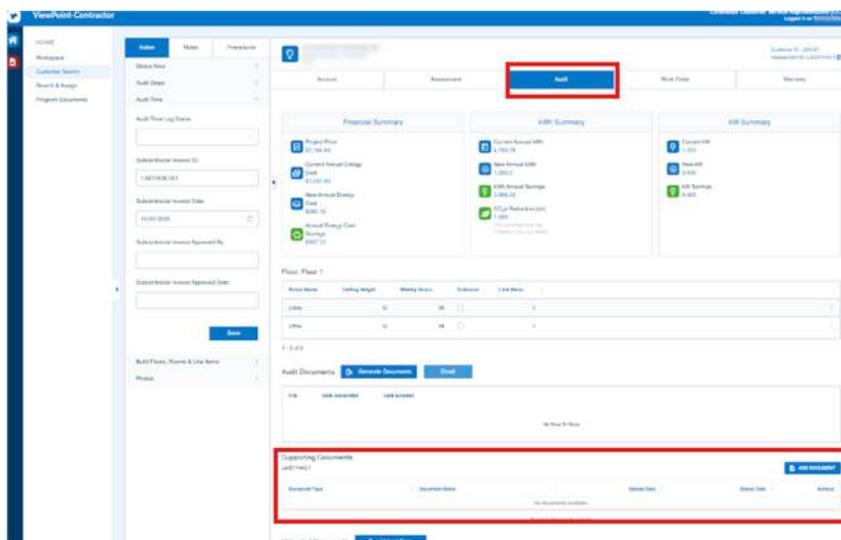


Figure 46 – Submit Invoice & Audit – Supporting Documents

12. Click Add Document

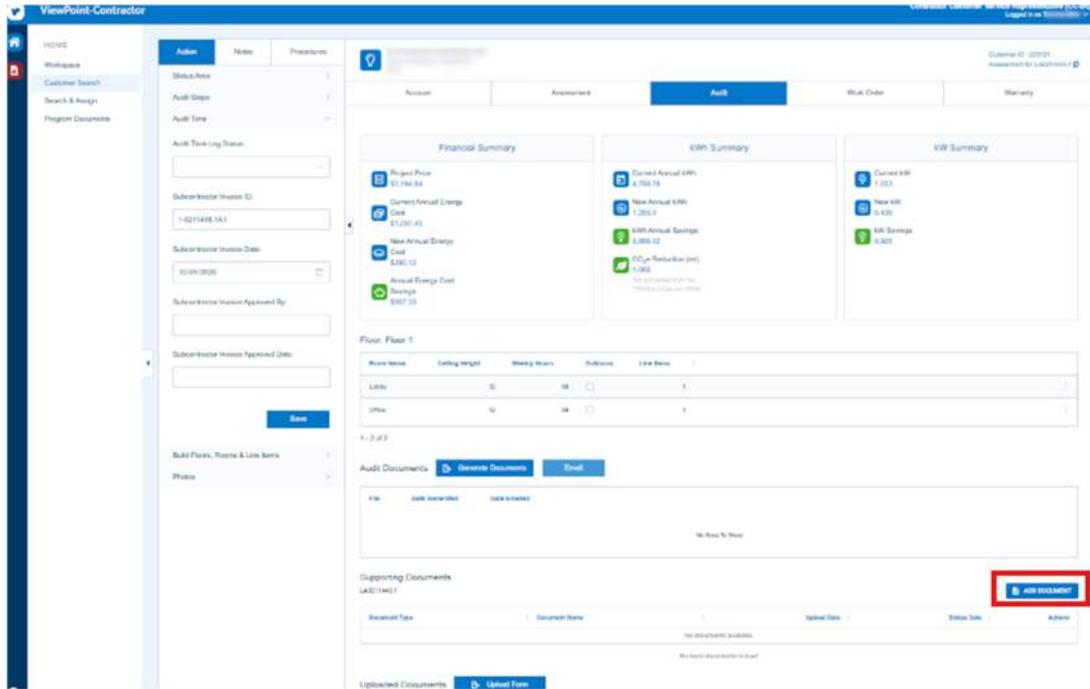


Figure 46 – Submit Invoice & Audit – Add Document

13. Select File Type

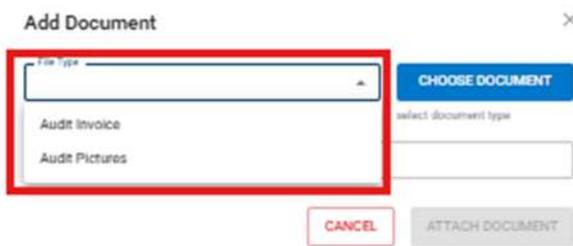


Figure 47 – Submit Invoice & Audit – File Type

14. Choose Document from where it is stored on your device

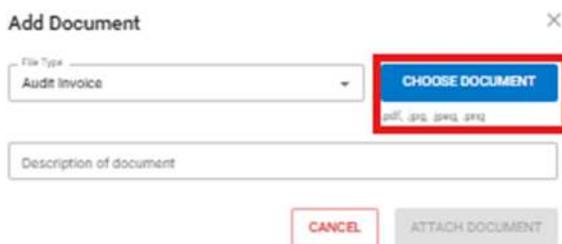


Figure 47 – Submit Invoice & Audit – Choose Document A

15. Once document has successfully been chosen the name of the document will be visible.

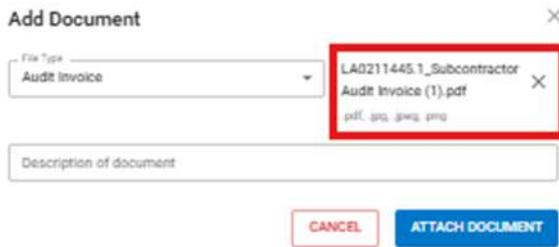


Figure 48 – Submit Invoice & Audit – Choose Document B

16. Click Attach Document

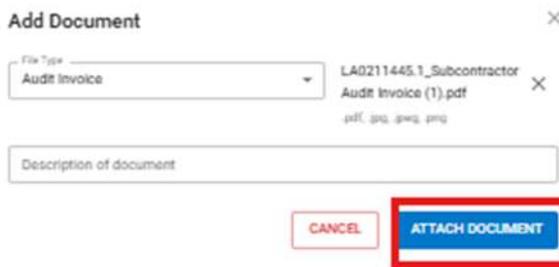


Figure 48 – Submit Invoice & Audit – Attach Document

Notification pop-up will appear “Document attached successfully”, in addition to the document now being visible in the Supporting Documents section



Figure 49 – Submit Invoice & Audit – Successful Document Attachment

17. Navigate back to the Action Panel (1) on left and click on Audit Time Log Status (2) and select Subcontractor Invoice Approved (3) from the drop-down menu. **Helpful tip (4): this section will have a blue button that says "Save" button. When the Subcontractor Invoice Approved is selected from the drop-down menu the blue button will now say "Submit"*

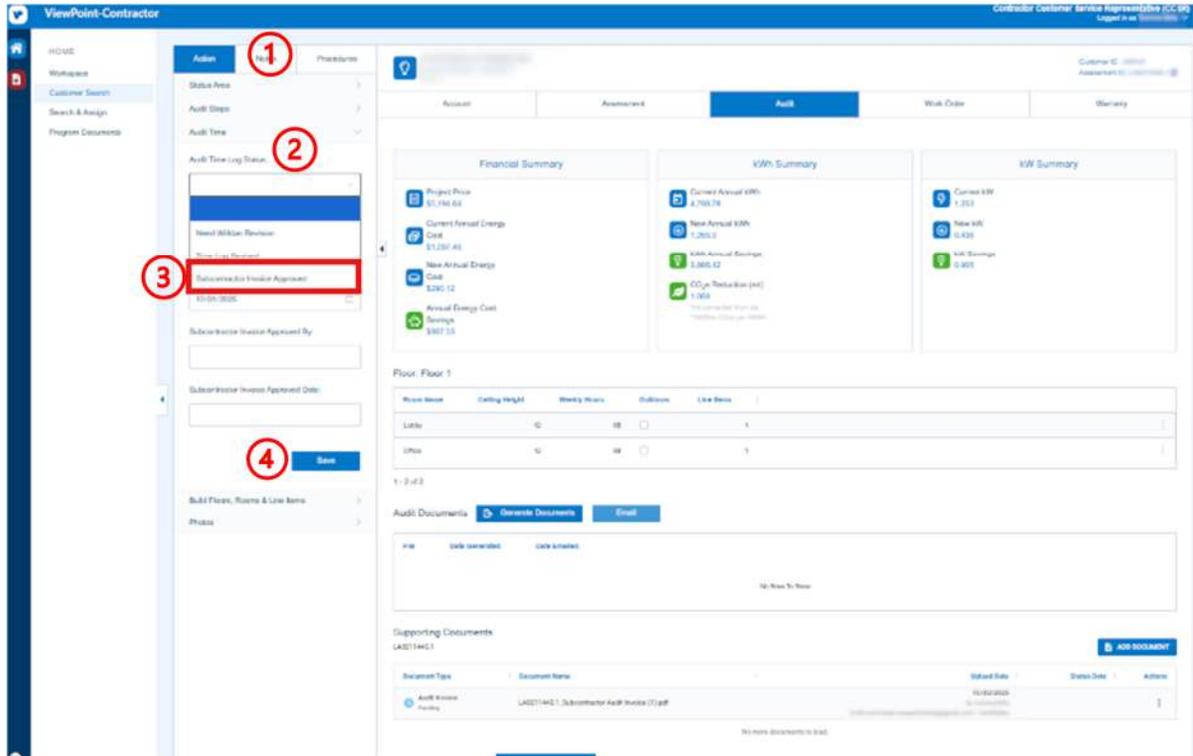


Figure 50 – Submit Invoice & Audit – Setting Audit Time Log Status

18. Click Submit.

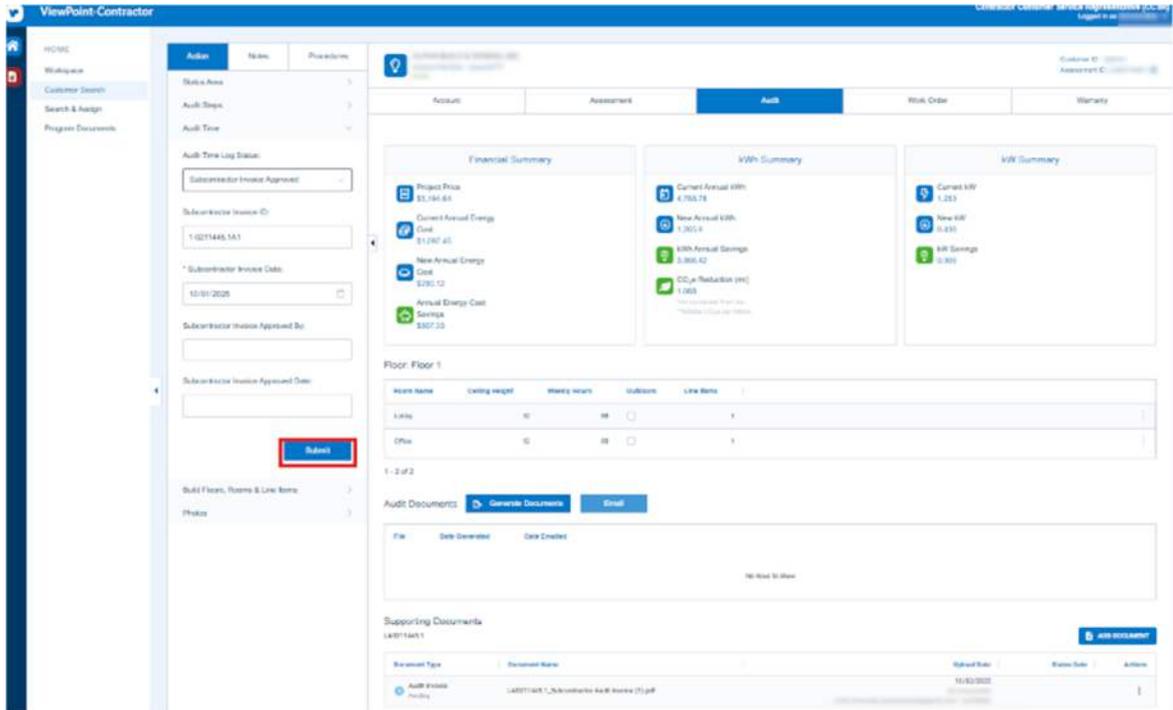


Figure 51 – Submit Invoice & Audit – Submit Audit

19. A pop-up will appear that will require confirmation of the submittal of the Audit Time Log. If “Yes” is clicked it will lock the audit data and no additional changes can be made to the audit or the audit time log. To proceed with submitting the Audit Time Log, click Yes. If additional updates are needed, click “No”.

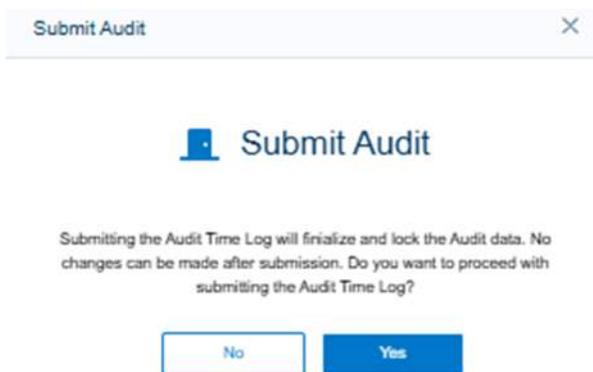


Figure 52 – Submit Invoice & Audit – Confirm Submit Audit

20. Upon Successful submittal the “Subcontractor Invoice Approved By” and the “Subcontractor Invoice Approved Date” will now show auto populated data of user that approved the submission and the date it was approved.

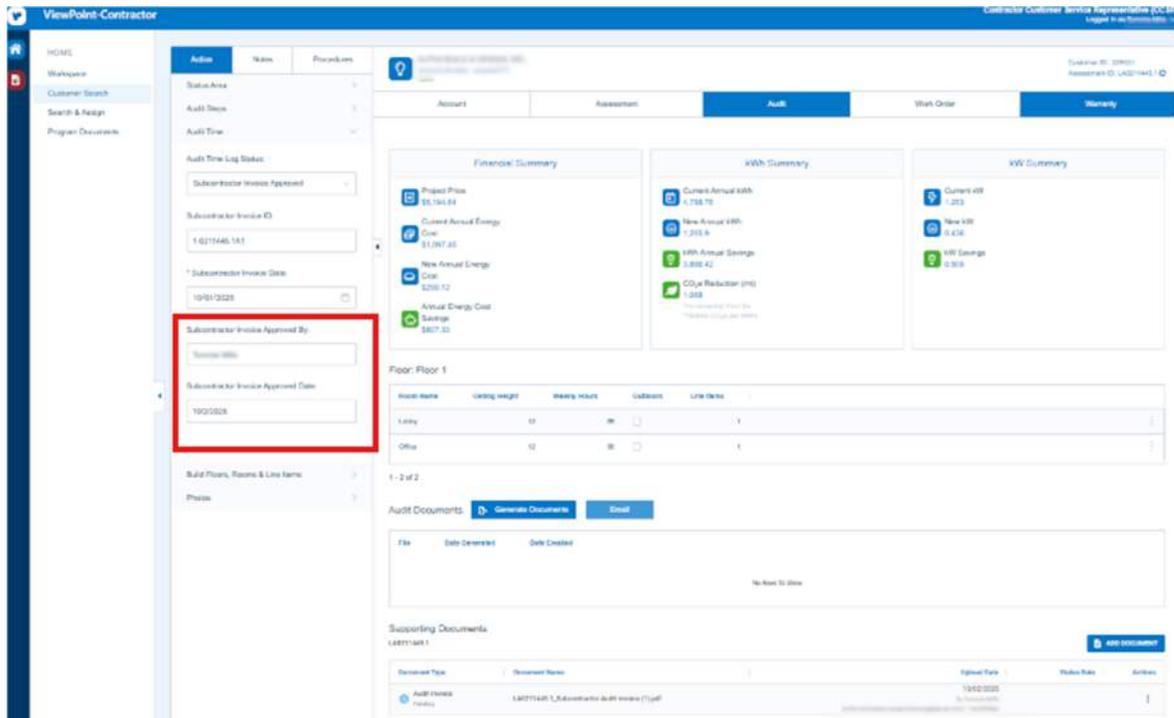


Figure 53 – Submit Invoice & Audit – Submitted

5. Conclusion

Our goal is to enhance your experience and streamline your workflow.

To contact Willdan support regarding the Audit Creation & Submittal, send an email to:

WES-Technology-Operations@willdan.com

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