WILLDAN

ViewPoint Audit Creation 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:
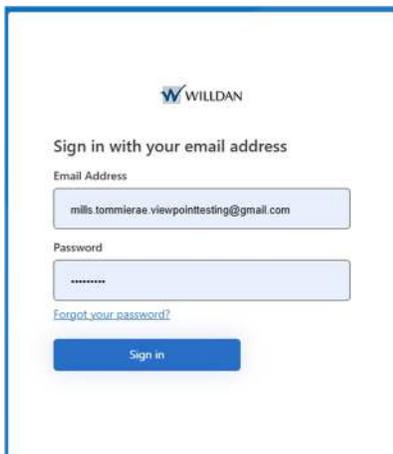
Figure 1 – ViewPoint Willdan Sign In

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.
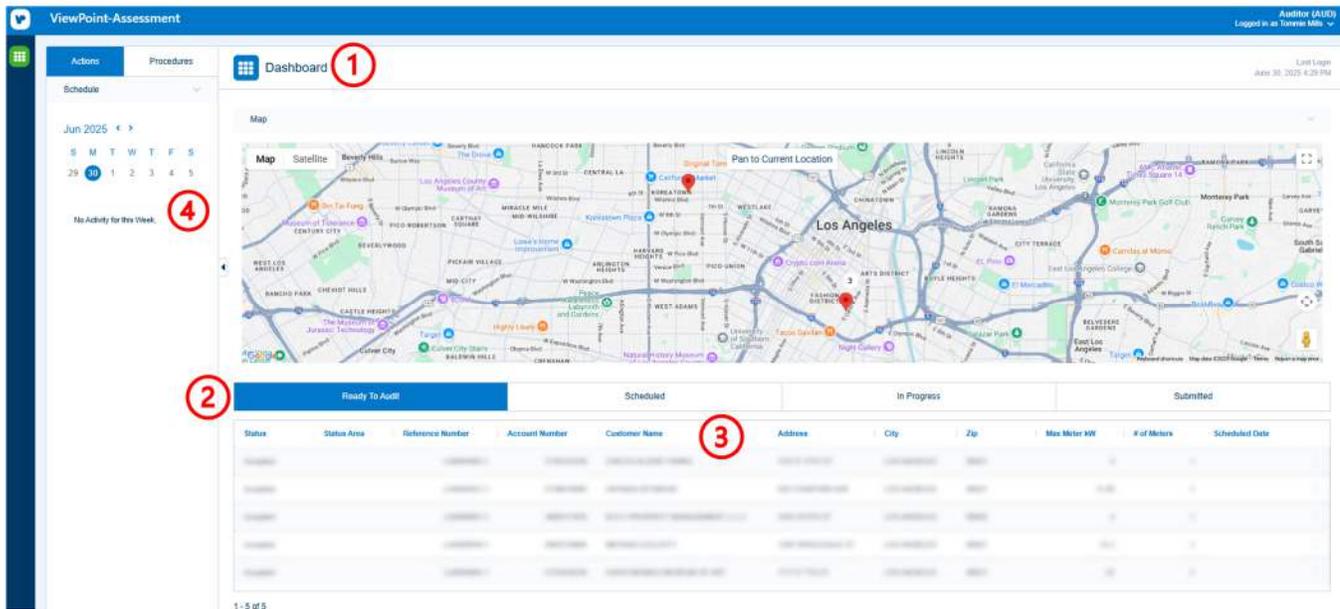

Figure 2 – Auditor Dashboard Default Screen – Four Sections of the Application List View

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.

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.
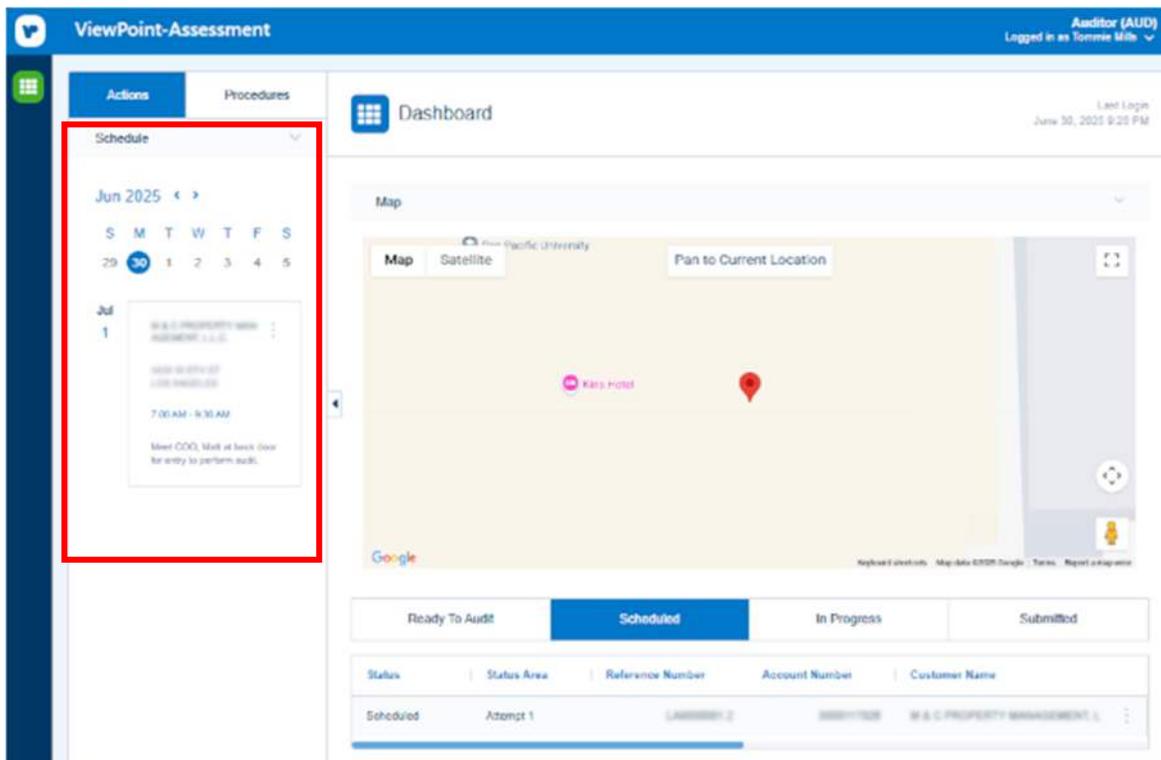

Figure 6 – Calendar of Scheduled Audits

3.4.1 – Scheduling an Audit in Calendar

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

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.

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

3. Your scheduled audit appointment now appears in your Calendar Schedule.
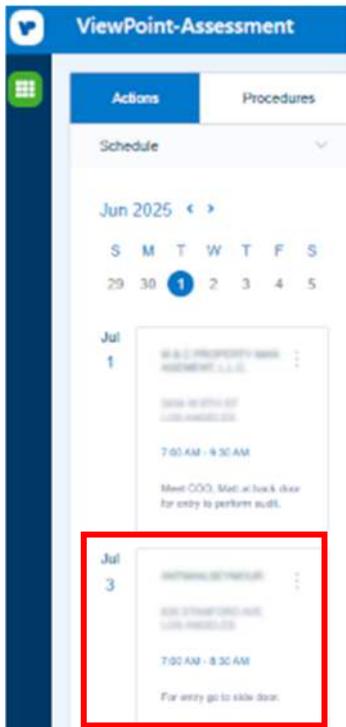
Figure 9 – Scheduling an Audit in Calendar – Audit Appointment Scheduled

3.4.2 – Scheduling an Audit under Assessment

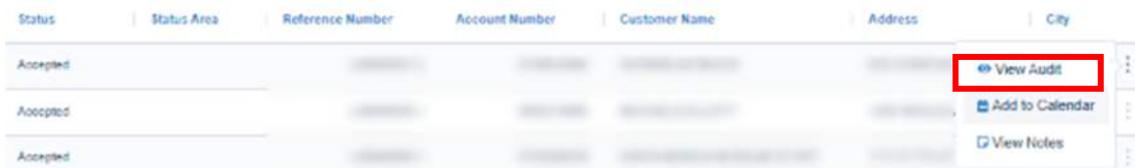1. Click on the three dots and select View Audit.

Figure 10 – Scheduling an Audit under Assessment – View Audit

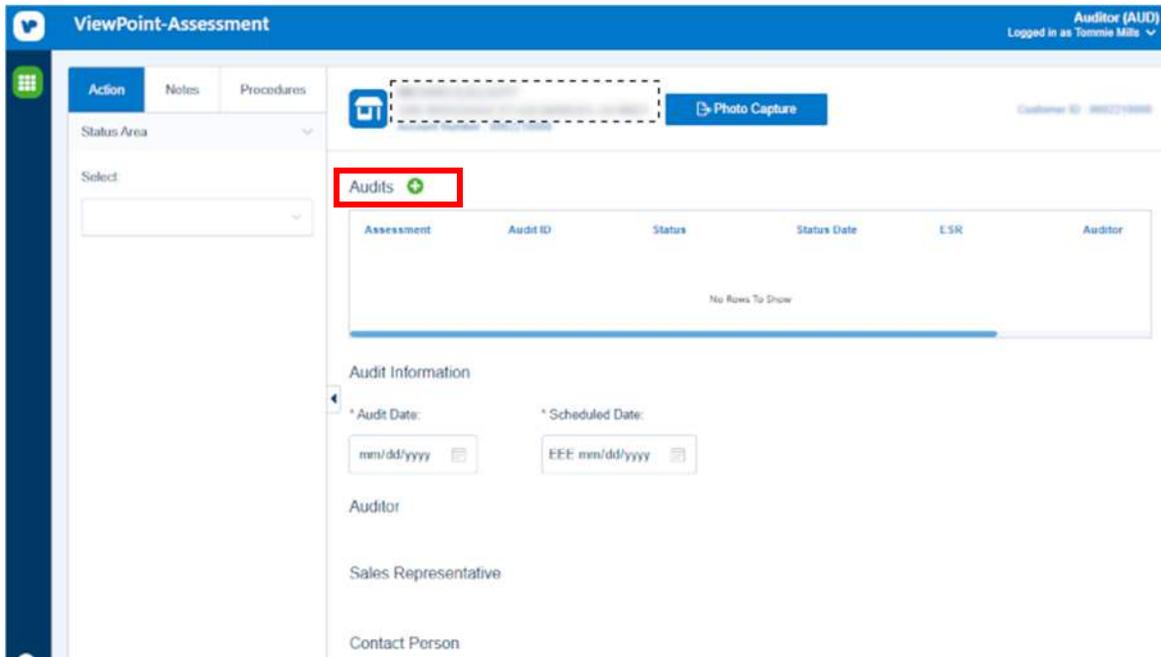2. Once in the Audit Screen click the green plus sign next to Audits.

Figure 11 – Scheduling an Audit under Assessment – Audits
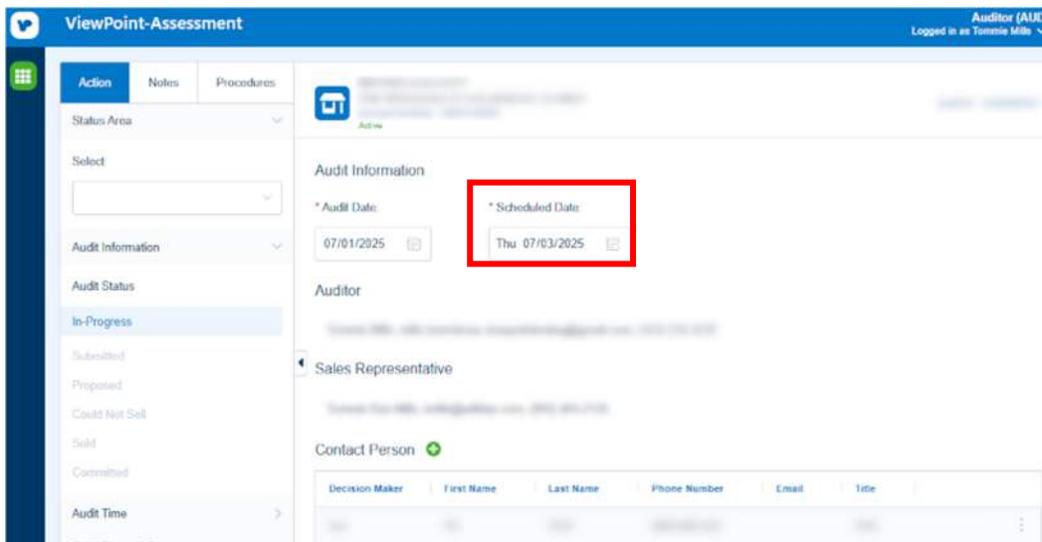
3. Enter Scheduled Date

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**.
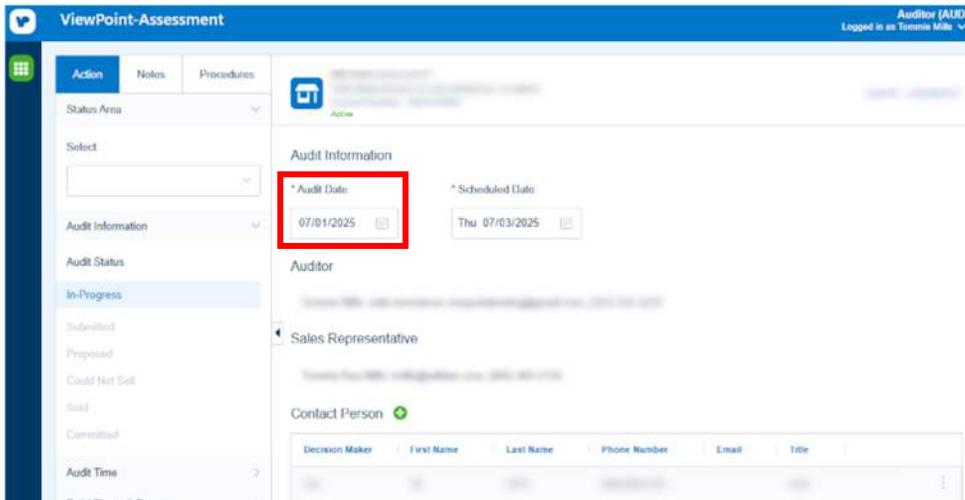

Figure 13 – Building an Audit – Audit Date

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.
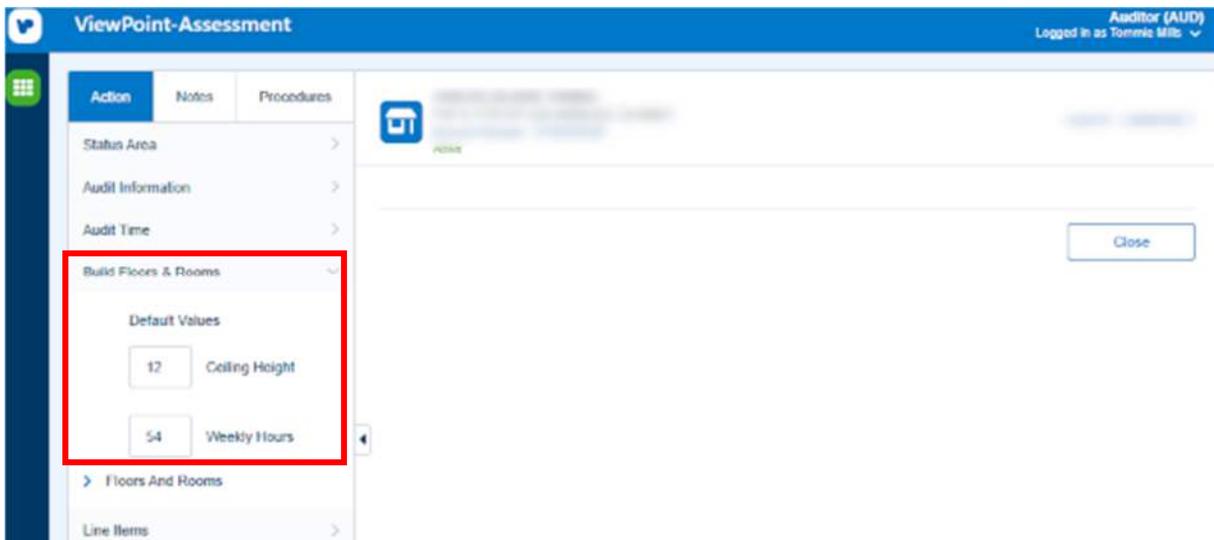

Figure 14 – Building an Audit – Building Floors & Rooms

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

4.1.1 – Adding a Floor

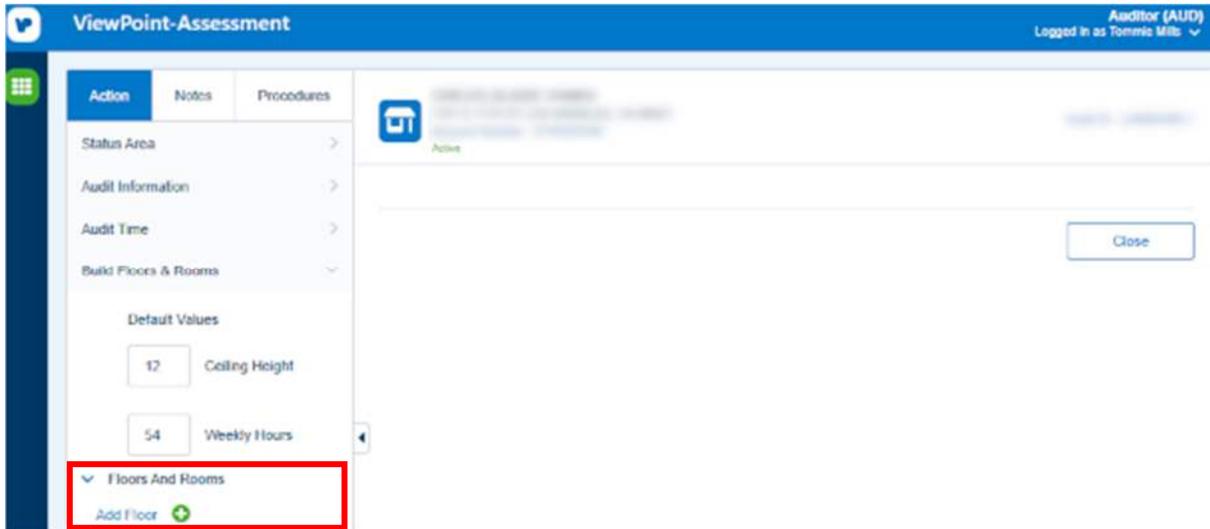1. Click on Floors and Rooms and select Add Floor

Figure 15 – Building an Audit – Adding Floor

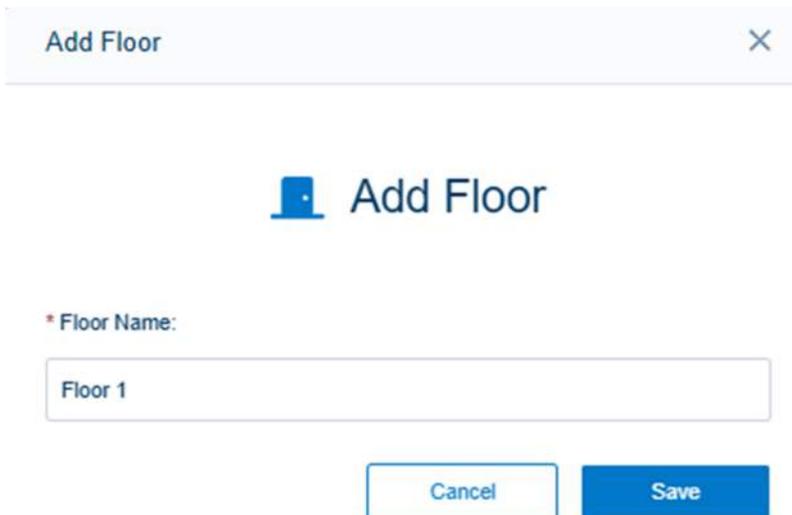2. The window below will appear. Enter Floor Name and Save.

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.
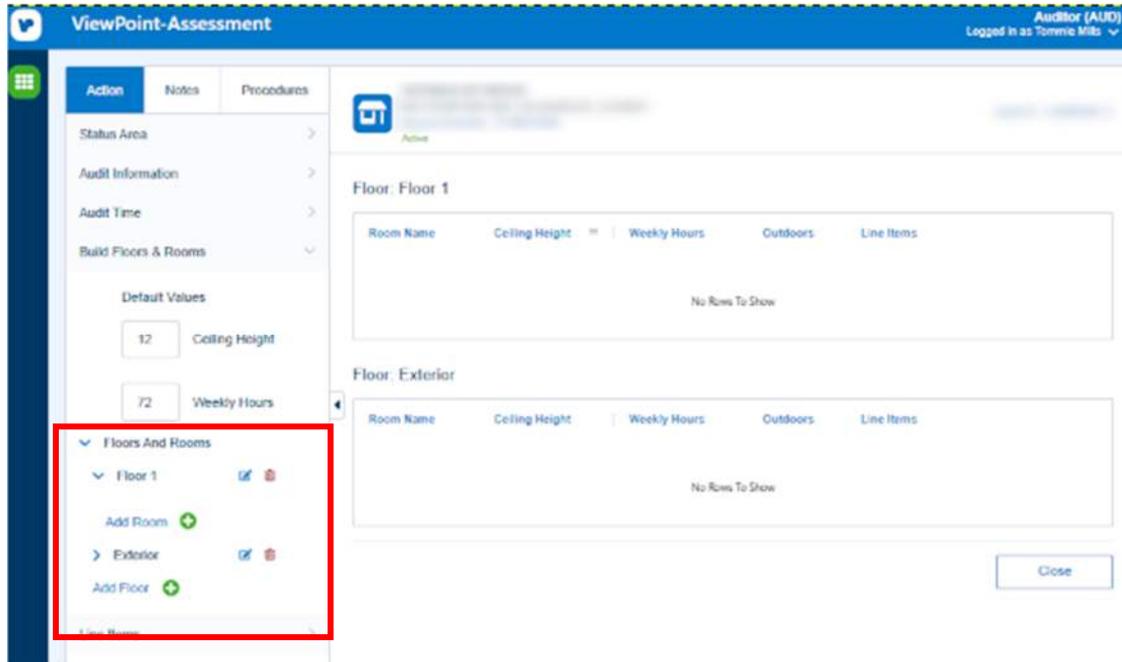

Figure 17 – Building an Audit – Adding a Room

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.
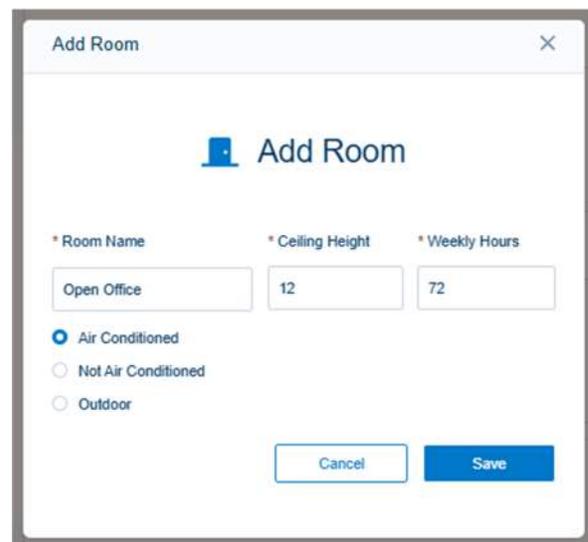

Figure 15 – Building an Audit – Adding Room Details

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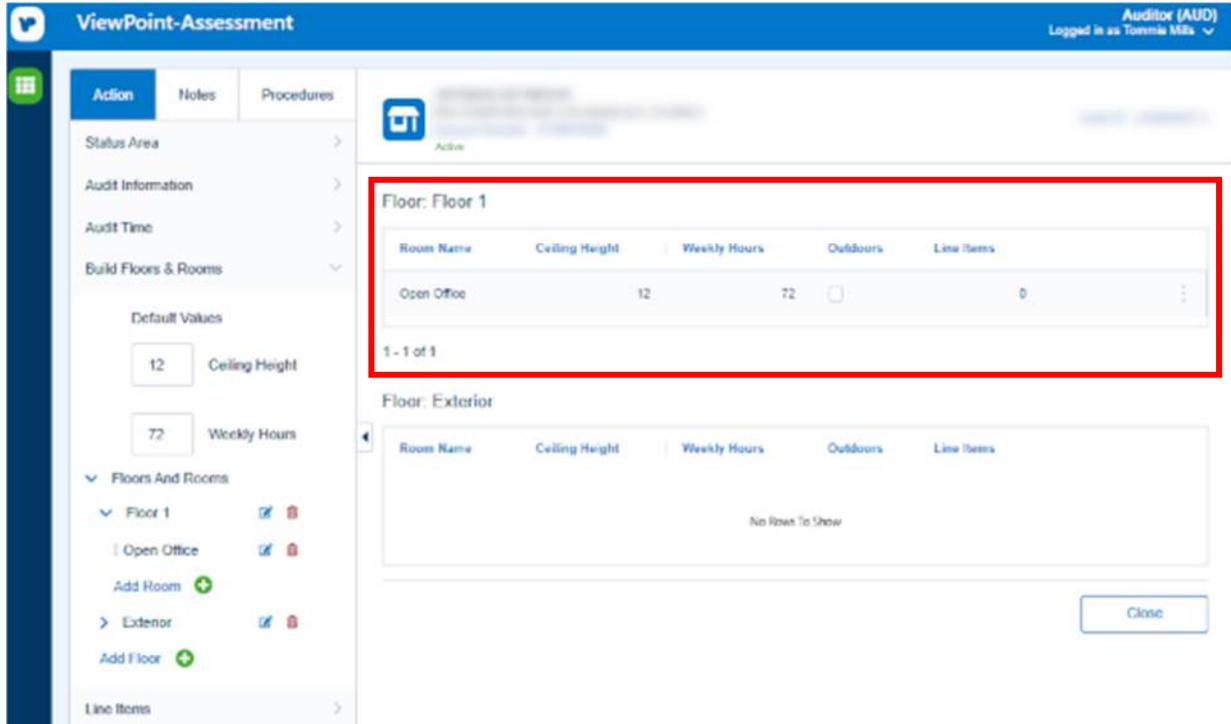

Figure 18 – Building an Audit – Built Room

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.
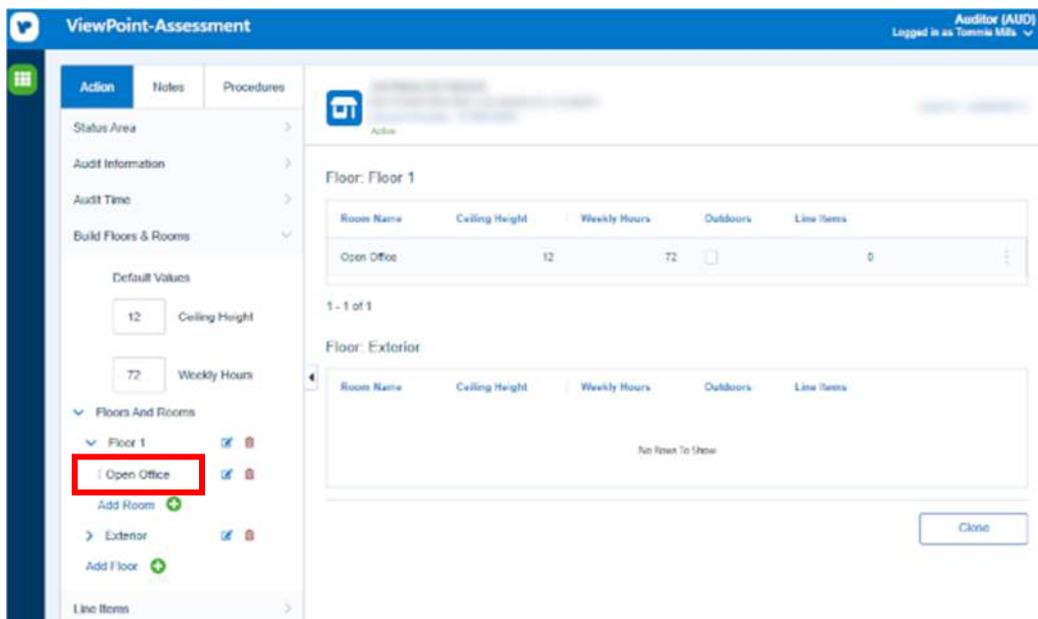

Figure 19 – Building an Audit – Selecting Room

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.
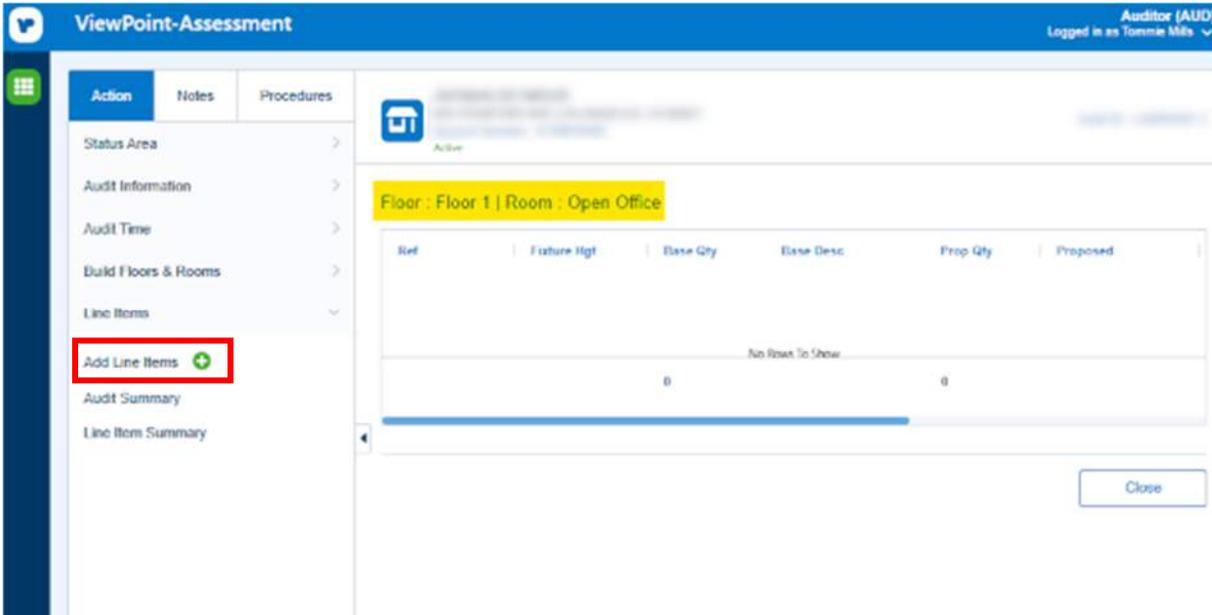

Figure 20 – Building an Audit – Add Line Items

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
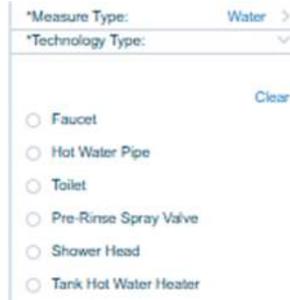   e. Shower Head
   f. Tank Hot Water Heater

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
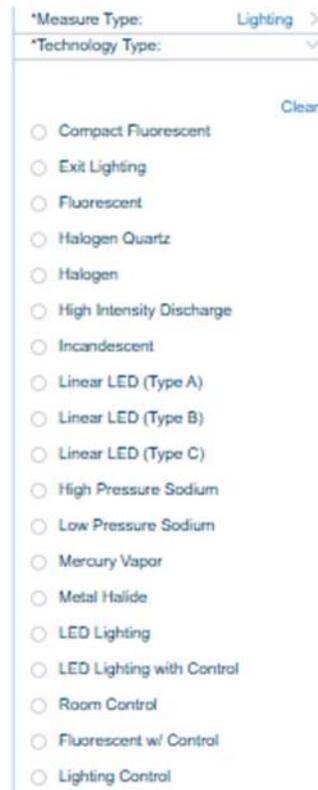

Figure 23 – Building an Audit – Technology Type – Lighting

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

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.

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.
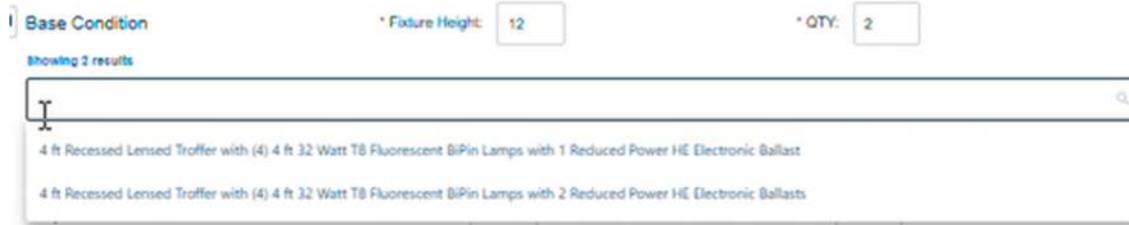

Figure 26 – Building an Audit – Technology Type – Base Condition Selection

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.
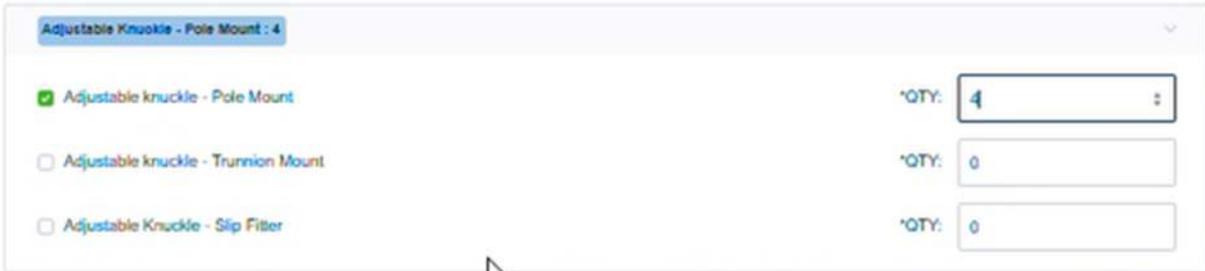

Figure 29 – Building an Audit – Technology Type – Add Accessory Example 1

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.

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.

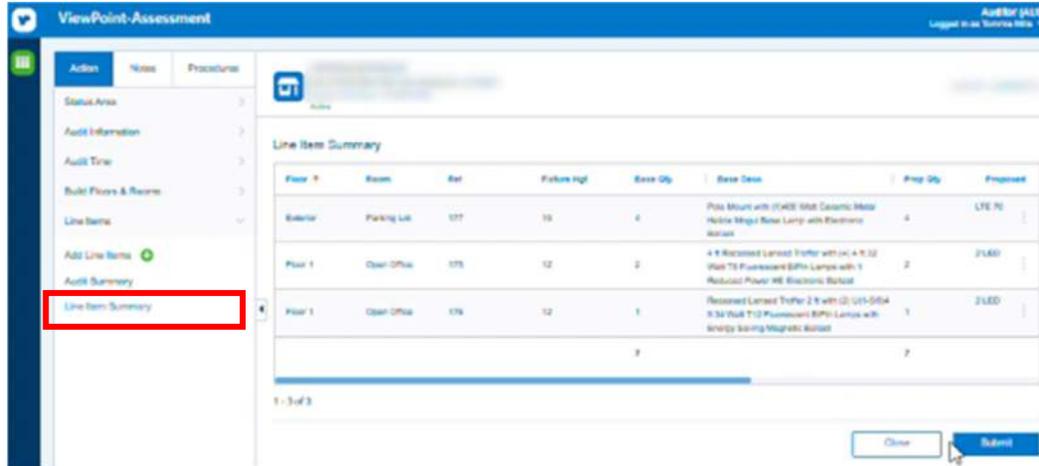1. Click Line-Item Summary on the Left side of screen.

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.
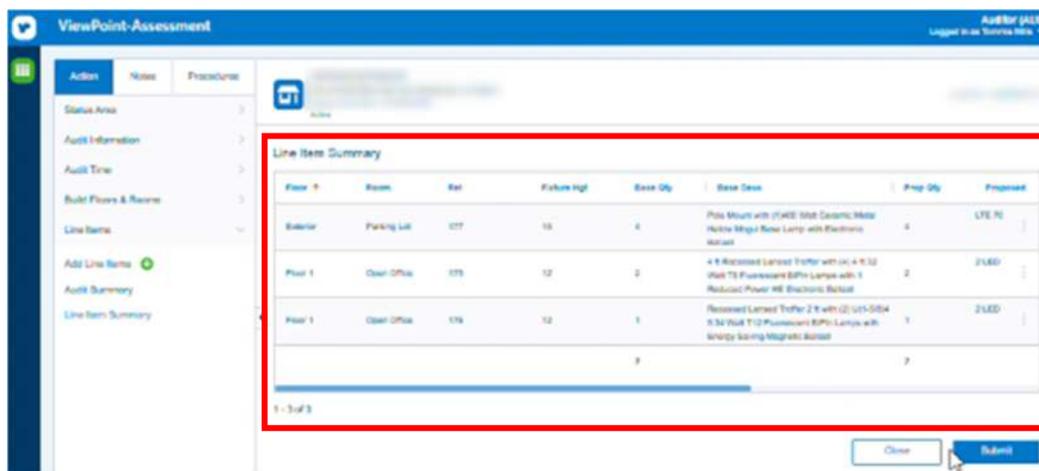

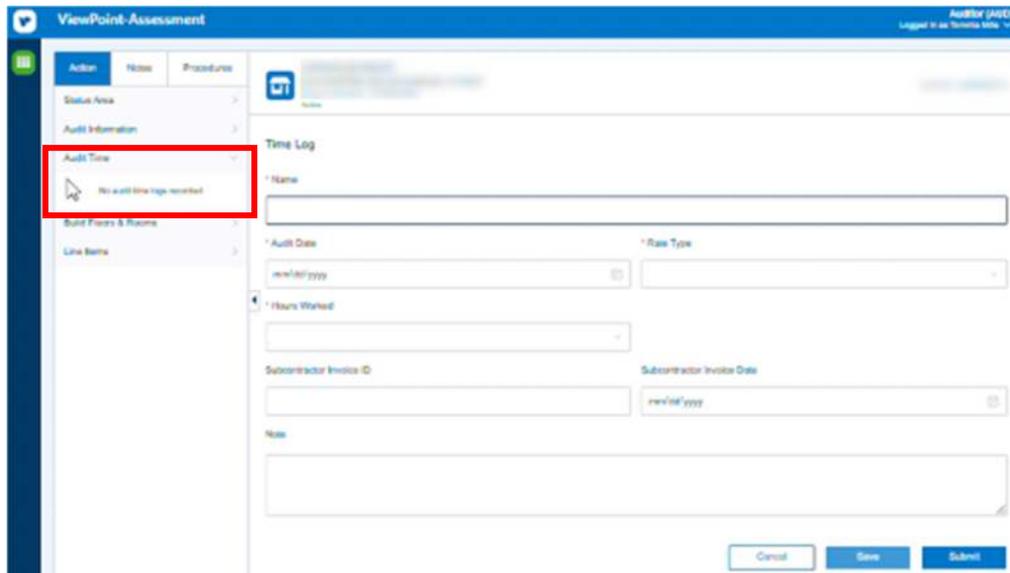*Figure 33 – Building an Audit – Technology Type – Line-Item Summary Detail*

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.

Figure 34 – Audit Time Log – Audit Time

2. Enter the following required information and Save.

    a. Name
    b. Audit Date
    c. Rate Type
    d. Hours Worked

Figure 35 – Audit Time Log – Time Log

3. 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 on the left under Audit Time.
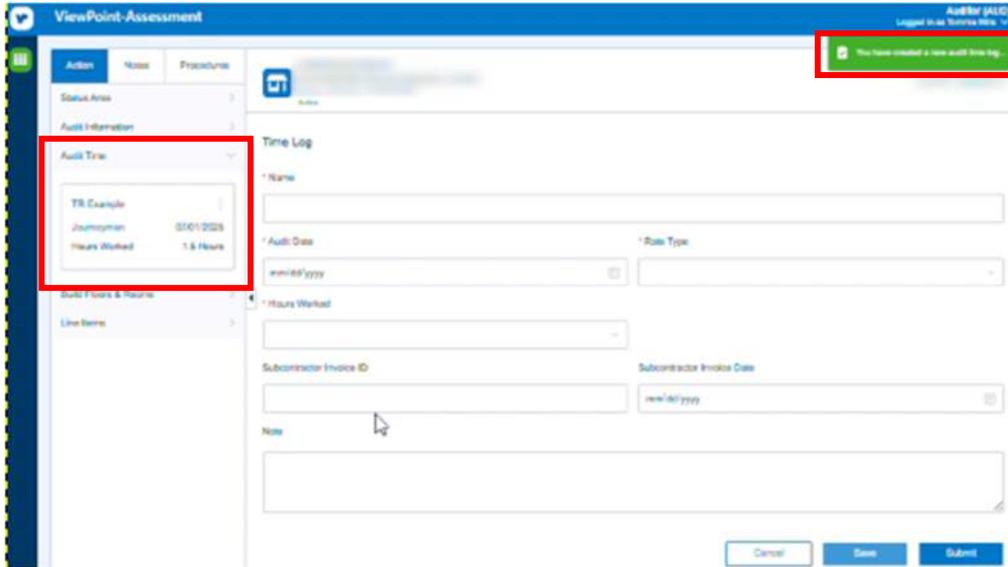

Figure 36 – Audit Time Log – Successful Time Entry

4.3.2 – Submit Audit

1. It is important to ensure that the Audit Time Log in 4.3.1 is complete prior to clicking to Submit. If the Audit Time Log is not complete, an Audit Submit Error window will open. Click "Log Time" and follow steps in 4.3.1.
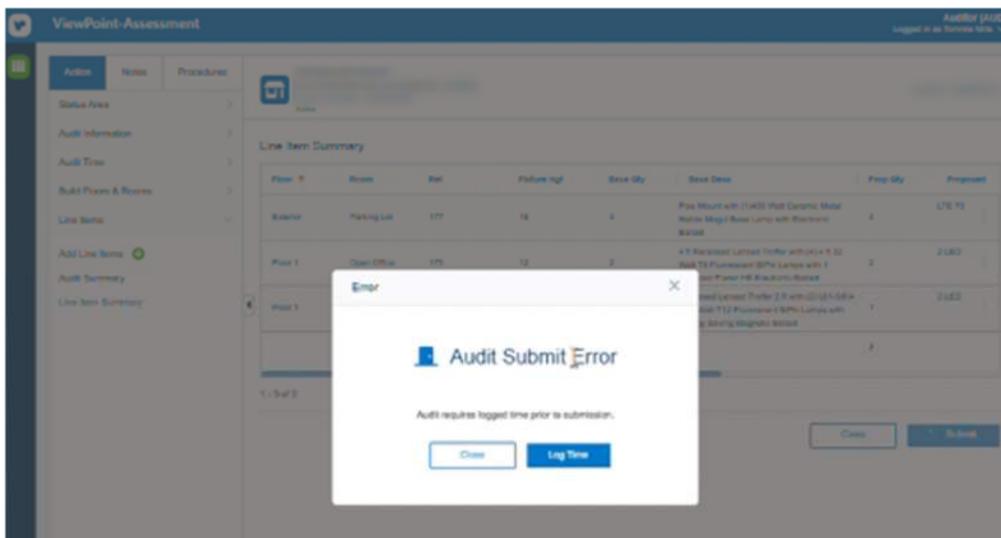

Figure 37 – Submit Audit – Audit Submit Error
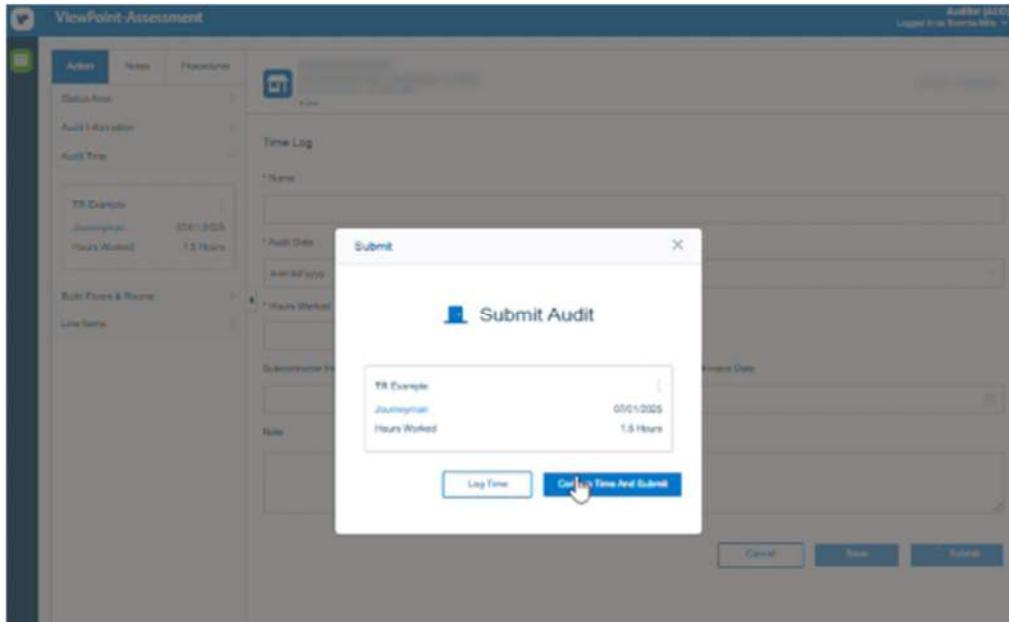
2. Click "Confirm Time And Submit"

Figure 38 – Submit Audit – Confirm and Submit

3. Upon Successful Submission a green notification will appear in top right corner of the screen. In addition, the status will now update to "Submitted".
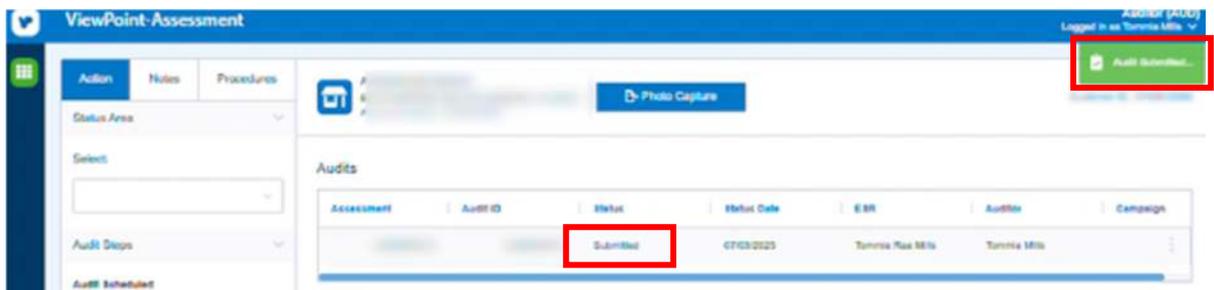

Figure 39 – Submit Audit – Audit Submitted

5. Conclusion

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

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

WES-Technology-Operations@willdan.com

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