# ViewPoint QA/QC Process User Guide

## Technology Services

This guide is here to help you with the QA/QC process in ViewPoint. It provides an overview of key features along with step-by-step instructions to improve your experience and efficiency.

# Table of Contents

# 1. Introduction

ViewPoint QA/QC will simplify QA/QC management and tracking. You can search for jobs and monitor their progress using categories like: QA/QC Exempted, Sent to QA/QC, QA/QC Complete – Fail, Resolution in Progress, QA/QC Complete – Pass, and QA/QC Delayed, keeping you organized and connected with your Willdan Program Team.

# 2. Logging In

To access ViewPoint QA/QC, you must first have access to ViewPoint with a CSR (Customer Service Representative) 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

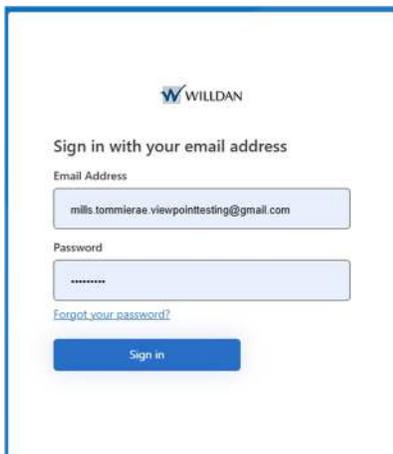3. Log in using your Willdan-issued credentials:



*Figure 1 – ViewPoint Willdan Sign In*

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

# 3. Default Workspace

Upon logging in, you'll see the default **Workspace** view. The workspace is divided into five sections; Eligibility, Leads, Audits, Work Orders and QAQC.  Each status is broken down by status details relative to the status section.  For this guide we will focus on the QAQC section.



*Figure 2 – QAQC Workspace*

## 3.1 – Returning to QAQC Workspace

You can return to the QAQC workspace anytime by clicking on the House then Workspace.
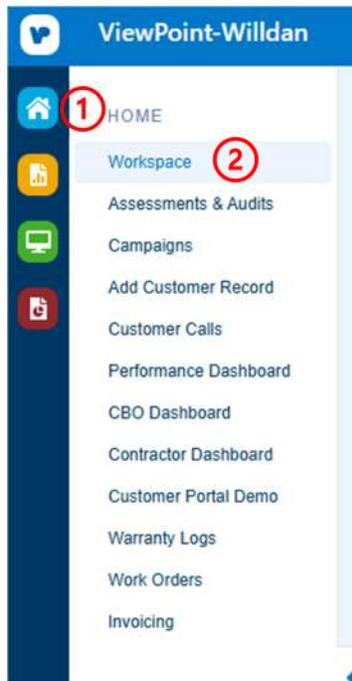


*Figure 3 – Returning to QAQC Workspace*

## 3.2 – QAQC Workspace 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 – QA/QC Exempted
This section includes all jobs that are bypassing QA/QC.

### 3.2.2 – Sent to QA/QC
It consists of jobs that require QA/QC to be performed.

### 3.2.3 – QA/QC Complete - Fail
Lists jobs that initially failed QA/QC inspection.

### 3.2.4 – Resolution In Progress
Any QA/QC that has been submitted back to installer to resolve items that failed QA/QC.

### 3.2.5 – QA/QC Complete - Pass
List of jobs that have successfully passed the QA/QC inspection.
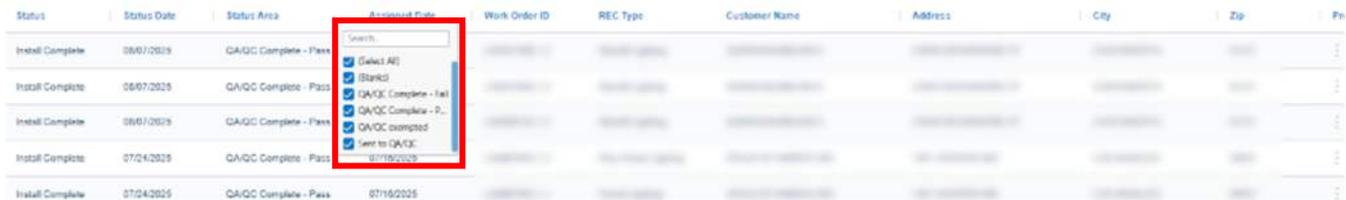
### 3.2.6 – QA/QC Delayed
Any QA/QC that is delayed for any reason will be in this section.

### 3.2.7 – All
Will show all QA/QC jobs regardless of status.

## 3.3 – Filtering

All jobs may be filtered in the header row of each QAQC 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 QAQC All – Filter View*

Available viewing filters:

- **Status** – For QAQC the only status that will ever be seen is Install Complete.

- **Status Date** – Allows filtering by Status date a.k.a. the date the installation was marked complete by the installing company.

- **Status Area** – Will track all statuses referenced prior in section 3.2.

- **Assigned Date** – Allows filtering by the date the project was assigned to an Installer.

- **Work Order ID** – Allows filtering by the Work Order ID number.

- **REC Type** – Allows filtering by REC Type. Common REC Types are:
  - i. **Retrofit Lighting**
  - ii. **Permit Lighting**
  - iii. **Plan Check Lighting**
  - iv. **Retrofit Refrigeration**

- **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

- **Project Cost** – Allows filtering by Project Cost

- **Labor Value** – Allows filtering by Labor Value

- **Install Company** – Allows filtering by the assigned Install Company

- **KW Savings** – Allows filtering by the KW Savings

- **Outdated PO** – Allows filtering by Current or Outdated POs

- **Install Scheduled Date** – Allows filtering by date of scheduled install date.

- **ESR** – Allows filtering by ESR

# 4. Performing QA/QC

There are several steps involved in performing QA/QC. This section breaks down the process and provides clear, step-by-step instructions to guide you through each stage.

## 4.1 – Accessing QA/QC Queue

To begin, select the **QAQC** status group. For this guide, we will start with the **"Sent to QA/QC"** status within the QAQC group. This will display a list of projects that are currently in the queue and ready for QA/QC review.



*Figure 6 – Performing QA/QC – Select "Sent to QA/QC"*



*Figure 7 – Performing QA/QC – "Sent to QA/QC" list of projects in queue ready for Q/QC review*

# 4.2 – QA/QC a Project

From the queue, locate the project you will be performing QA/QC on. Click the ellipsis (⋮) on the right side of the project entry and select **"View Work Order"** from the dropdown menu.



*Figure 8 – Performing QA/QC – Selecting a Project from Queue*

## 4.2.1 – Open & Verify Work Order

When you click **"View Work Order,"** the selected Work Order will open. Keep in mind that a customer may have multiple projects in different stages of the process. As a result, it's important to verify that the correct project is selected by checking the **blue highlight** in the queue. This confirms you are performing QA/QC on the correct Work Order.



*Figure 9 – Performing QA/QC – Open & Verify Work Order*

## 4.2.2 – Scheduling QA/QC Inspection

Click on the **QA/QC** tab located next to the **Work Order** tab. This section allows you to review, schedule, and manage QA/QC tasks for the selected project.

⚠️ **_Important Reminder:_**
_A customer may have multiple projects in various stages. When switching to the QAQC tab, the system may default to the **first project in the list**, rather than the one you initially selected. Be sure to **verify that the correct project is still highlighted in blue** before proceeding with any QA/QC actions._
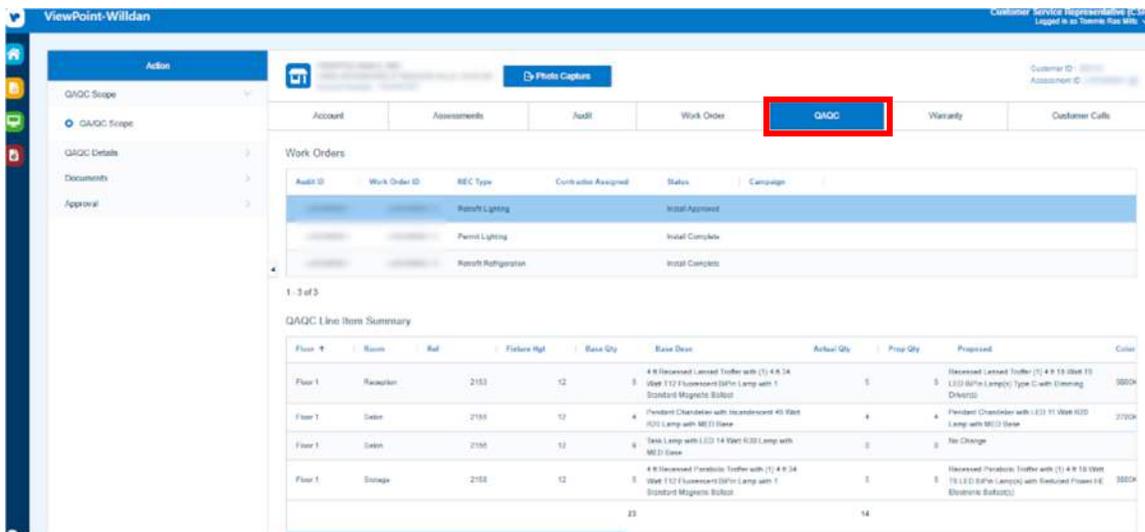


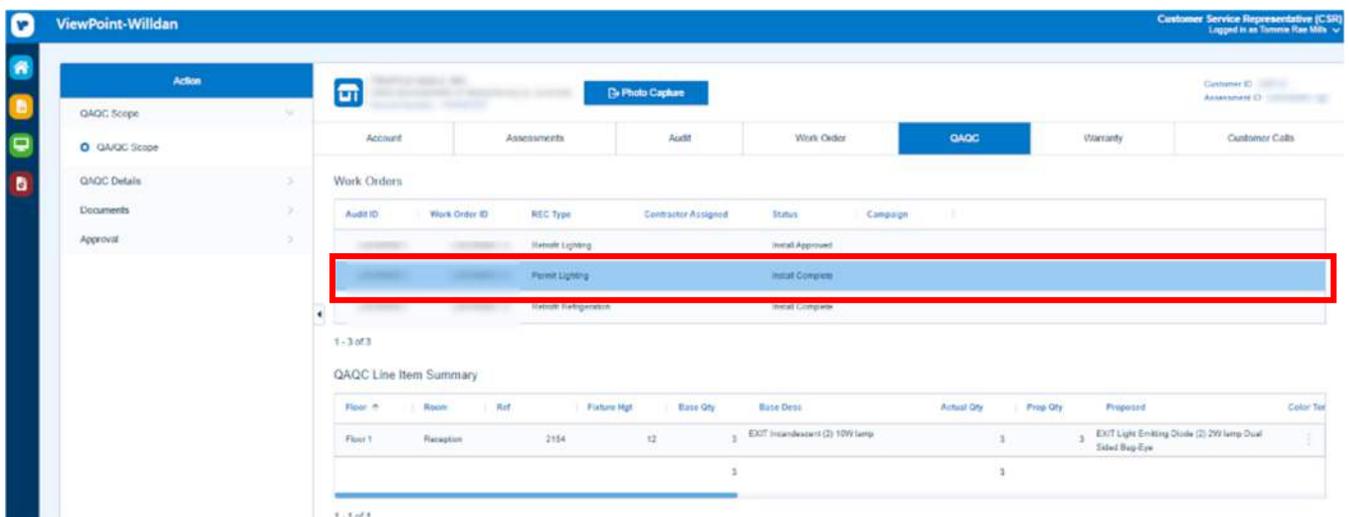Figure 10 – Performing QA/QC – QAQC Tab View defaults to first project in list



Figure 11 – Performing QA/QC – Confirm the correct project is highlighted in the project list

In the QAQC tab, navigate to the Action panel on the left-hand side and perform the following steps:

1. Click on **"QA/QC Details"**

2. Confirm you are the **QA/QC Inspector**.

3. Enter the **Inspection Date** for the project. This date marks when the QA/QC review is (or will be) performed and is a required part of the project documentation.

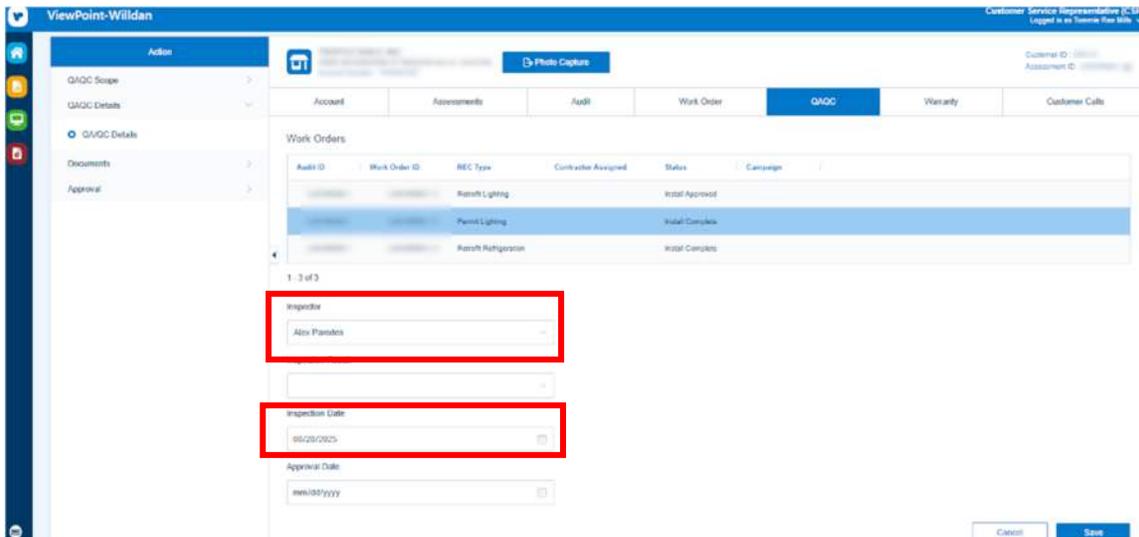4. After entering the date, be sure to click **"Save"** to record the information.



*Figure 11 – Performing QA/QC – Scheduling QA/QC Inspection Date*

5. If Inspection Date will not occur with in a day or two, return to the Work Order and set status to "**QC/QC Delayed**".
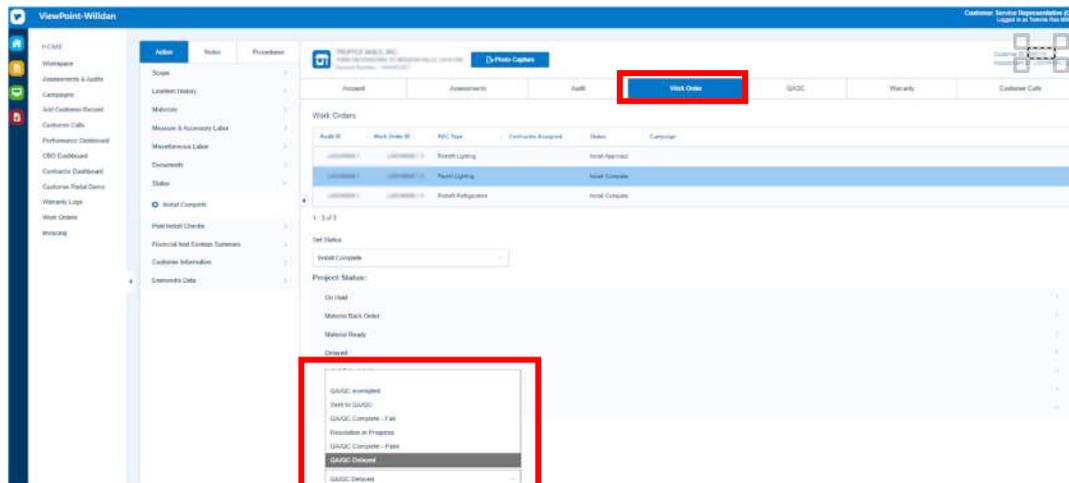


*Figure 12 – Performing QA/QC – Noting QA/QC Delayed*

## 4.2.3 – Review Scope of Work

Reviewing the Scope of Work ensures you're aligned with the project requirements during the QA/QC process.  To view the Scope of Work:

1.  Click on "Documents" under the Action Panel on the left-hand side. A list of documents related to the project will appear on the right.

2.  Locate the Scope of Work document.

3.  Click the ellipsis (:) to the right of the Scope of Work entry, then select "View" to open and review the document.

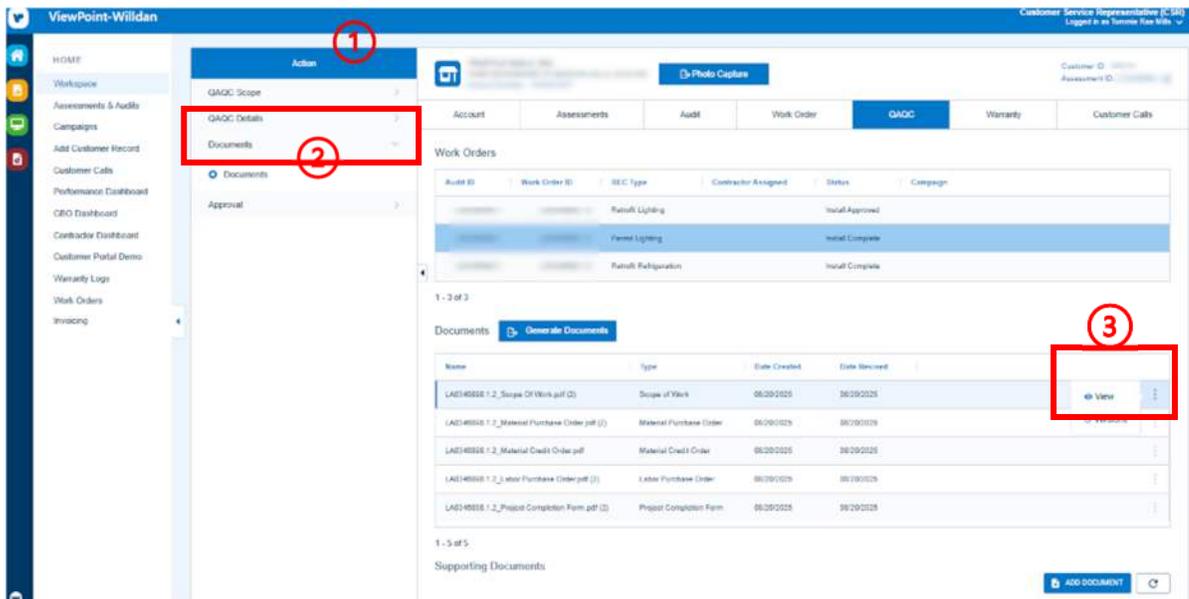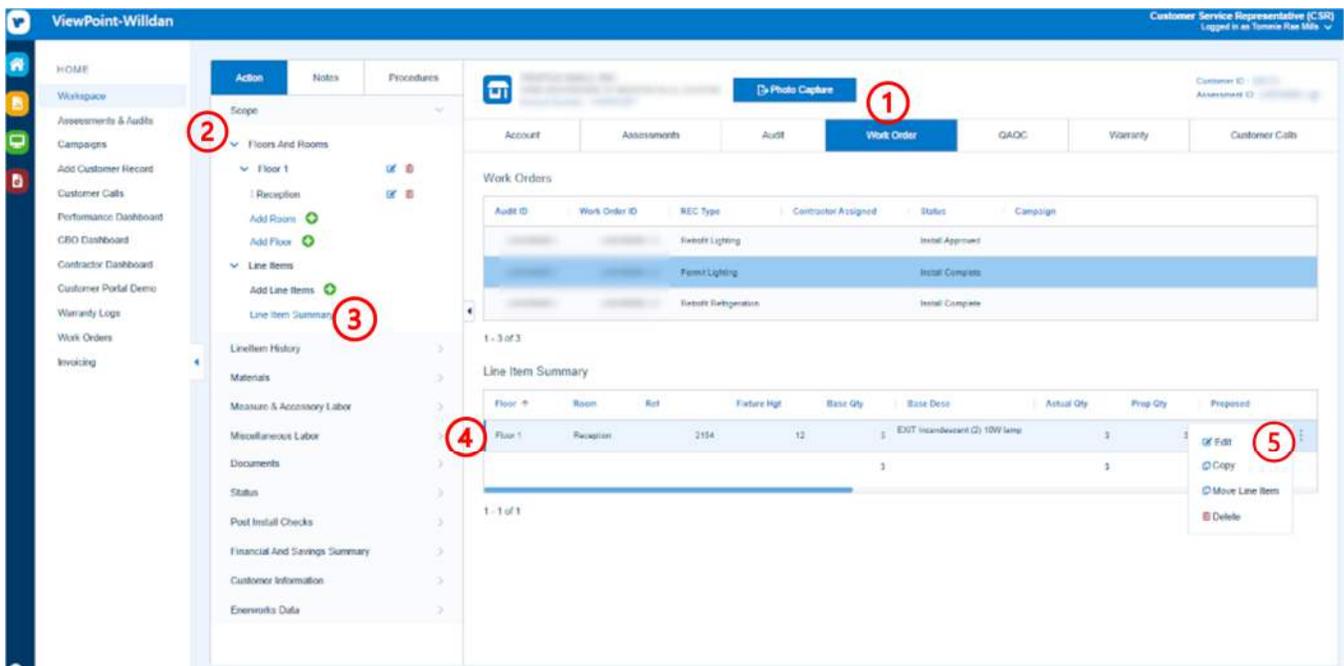4.  If there are no discrepancies, please proceed to section 4.3.4.



*Figure 12 – Performing QA/QC - Review Scope of Work*

## 4.2.4 – Note Discrepancies in Line Items

Accurate documentation of discrepancies is essential for accountability and quality control. During the QA/QC review of the **Scope of Work**, you may come across discrepancies or issues that need to be addressed in specific line items. To edit and document these:

1.  Click on the **Work Order** tab at the top.

2.  In the **Action** panel on the left-hand side, select **"Line-Item History."**

3.  On the right-hand side, review the list of line items.

4.  Locate the line item that contains a discrepancy.

5.  Click the **ellipsis (⋮)** next to the line item and select **"Edit."**



*Figure 13 – Performing QA/QC – Identifying Line Item with Discrepancy*

After selecting Edit for the appropriate line item:

1. **Enter the Verified Quantity** to reflect what was confirmed during inspection.

2. Add **detailed notes** in the Notes section to explain any discrepancies found. Clear documentation ensures transparency and supports future review.

3. In the **"Revised By"** field, use the dropdown menu to select **"QA/QC Inspector"** to indicate who made the revision.

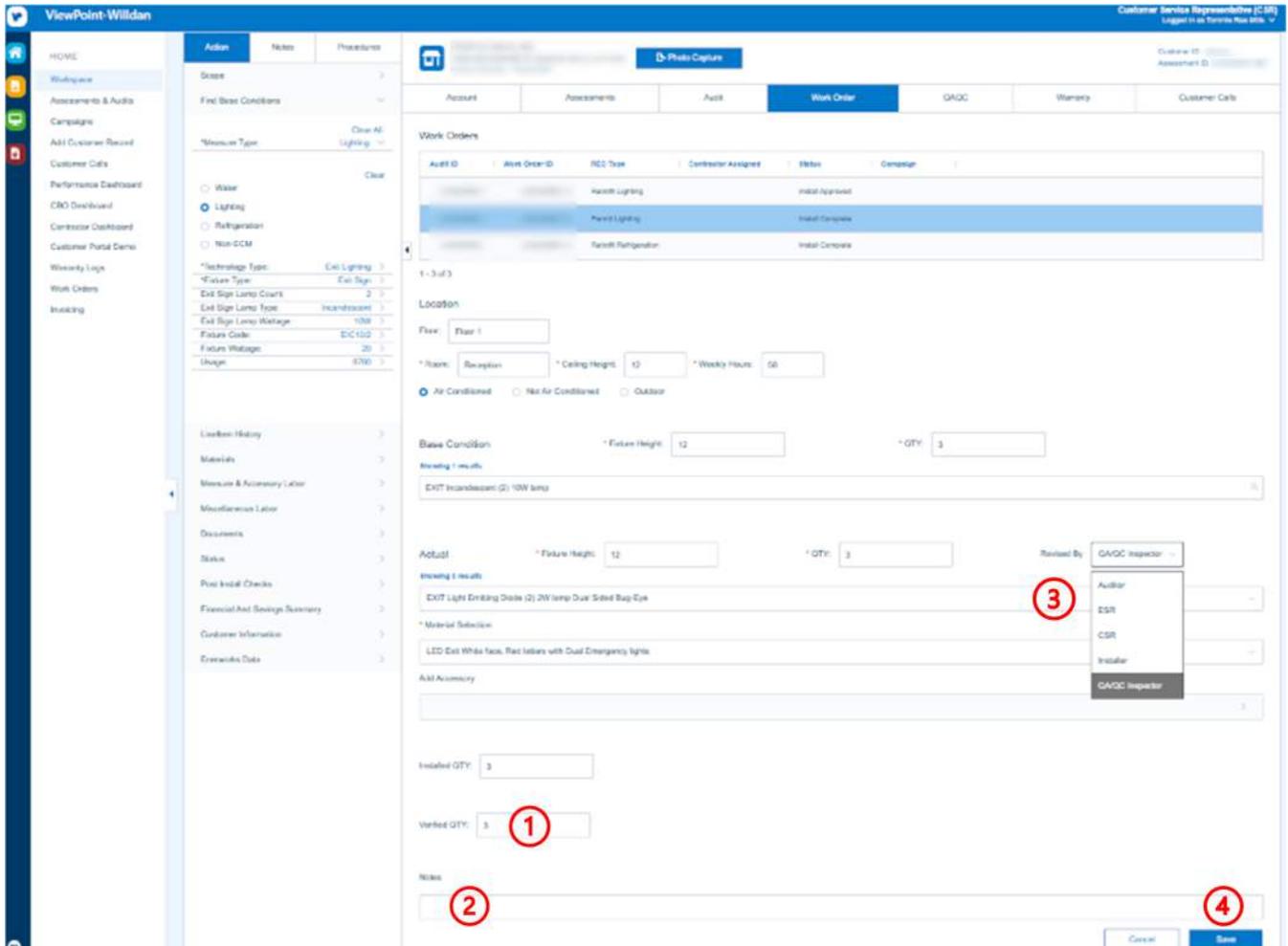4. Make sure all information is accurate, then **save your changes** to update the record.



*Figure 13 – Performing QA/QC – Note Discrepancies in Line Items*

## 4.3 – Post Inspection

All line items associated with the project have undergone full Quality Assurance and Quality Control (QA/QC) review. Each item has been verified for accuracy, completeness, and compliance with project standards. The QA/QC process is now complete and needs to be documented accordingly.

### 4.3.1 – With Discrepancies – Resolution in Progress

During the QA/QC process, any discrepancies identified are to be recorded and flagged as a **"QA/QC Complete - Fail."** If the discrepancy is actively being addressed and a solution is underway, it will be noted as **"Resolution in Progress"** until the issue is fully resolved and re-verified. Once resolution is confirmed, the item will be updated accordingly and **retained in QA/QC Complete - Fail** status for tracking purposes in relation to the Subcontractor Scorecard.

Noting a Resolution in Progress:

1. Navigate to the Work Order Tab
2. Click on the Action Tab in the left-hand panel
3. Select Status
4. Choose the appropriate QA/QC status:
   a. Resolution In Progress - When marking an item as "Resolution in Progress," be sure to document the steps being taken toward resolution in the **Notes** section for transparency and traceability
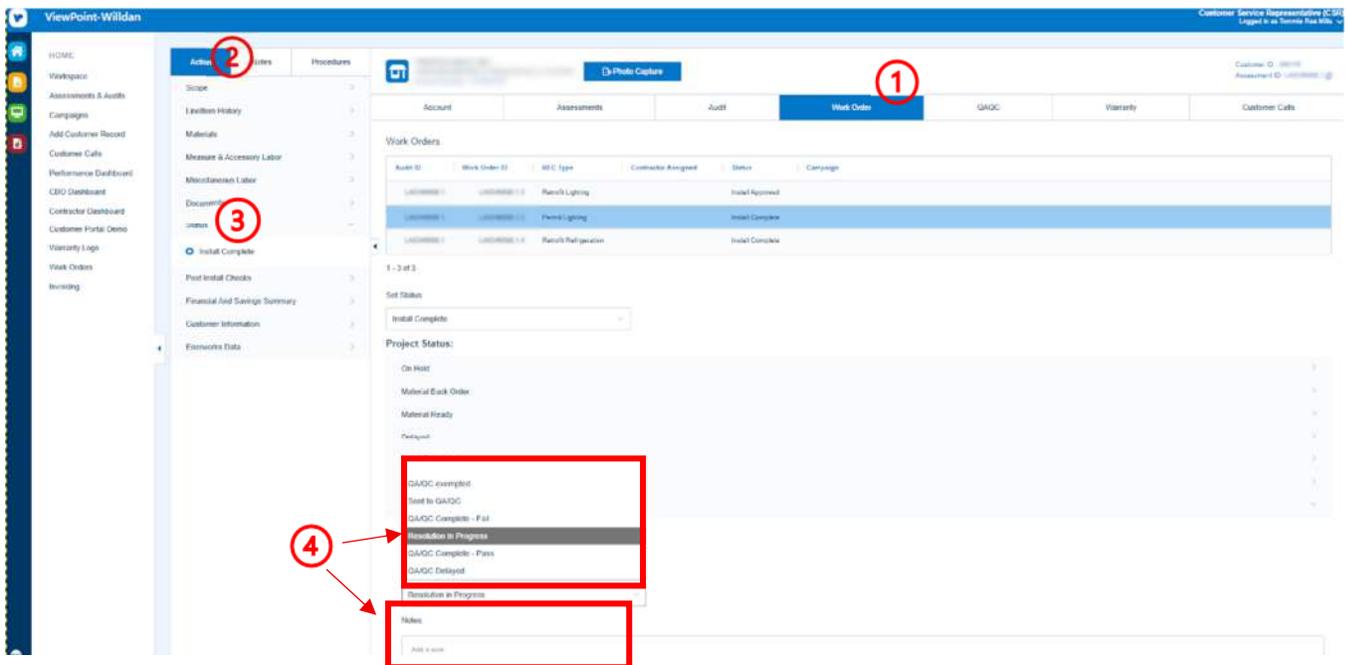


*Figure 14 – Post Inspection – Resolution in Progress*

## 4.3.2 – With Discrepancies – QA/QC Complete - Fail

The **QA/QC Complete - Fail** status is used when discrepancies are identified during the QA/QC process. This status may be applied in one of two scenarios:

- Immediately following the QA/QC inspection, when a discrepancy is clearly identified and not resolved on the spot.

- After a period marked as "Resolution in Progress", if the issue remains unresolved or fails to meet QA/QC standards upon re-inspection.

  This status ensures that unresolved or poorly addressed discrepancies are properly tracked and will be reflected in the Subcontractor Scorecard for performance evaluation.

  Noting a QA/QC Complete - Fail:

1. Navigate to the Work Order Tab
2. Click on the Action Tab in the left-hand panel
3. Select Status
4. Choose the appropriate QA/QC status from the drop-down menu:
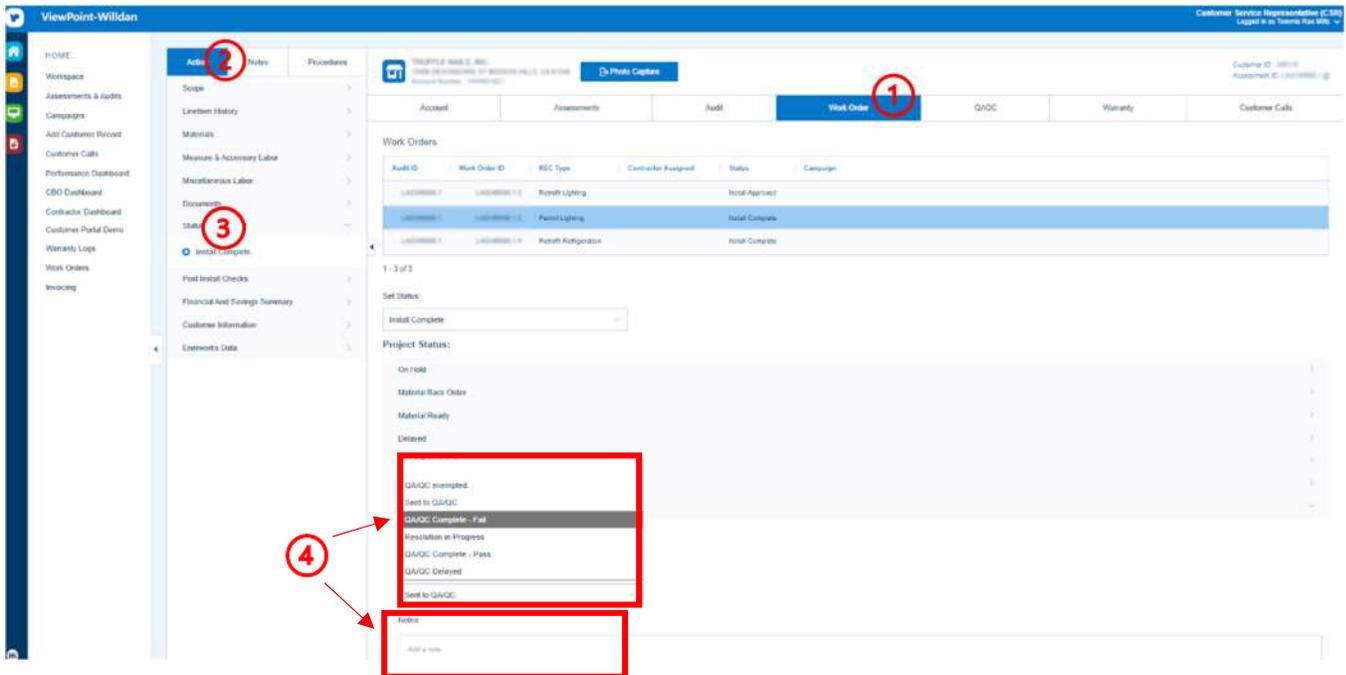   a. QA/QC Complete - Fail



*Figure 15 – Post Inspection QA/QC Complete- Fail*

## 4.3.3 – With Discrepancies – Regenerate Documents

When a project fails QA/QC, all project documents must be regenerated to reflect the QA/QC findings.

To do this:

1. Navigate to the **QA/QC** tab.

2. In the **Action** panel on the left-hand sid

3. Click on **Documents**.

4. On the right-hand side, a list of all project documents will be displayed. Click on **"Generate Documents"** to update the documents with the latest QA/QC findings.

5. Proceed to step 4.3.5.

This ensures that all documentation reflects the QA/QC findings and any corrective actions taken, maintaining accurate records for compliance, rework, and performance tracking.
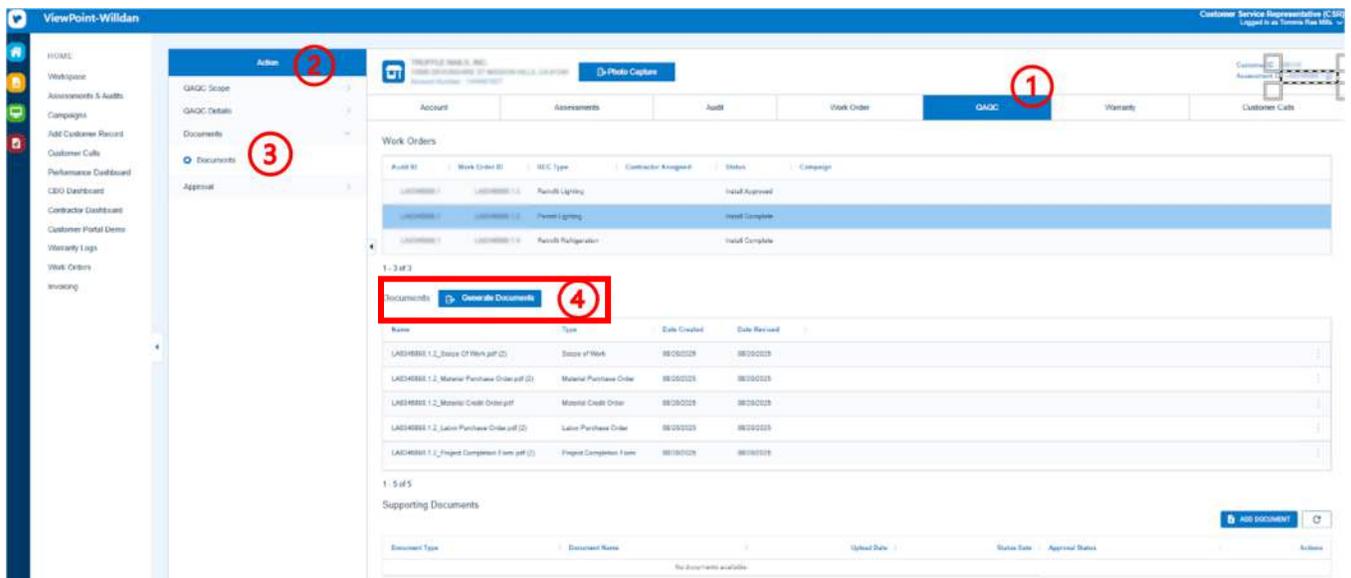


*Figure 16 – Post Inspection – Regenerate Documents*

## 4.3.4 – Without Discrepancies

Even when no discrepancies are found during the QA/QC inspection, it is mandatory to document the result in the system. Documenting a QA/QC Pass (No Discrepancies Found):

1. Navigate to the **Work Order** tab. Ensure the correct **Work Order** is highlighted in blue.

2. In the **left-hand panel**, click on the **Action** tab.

3. Click **Status**.

4. On the right-hand side, under **Post-Inspection Status**, select **"QA/QC Complete – Pass"** from the dropdown menu.
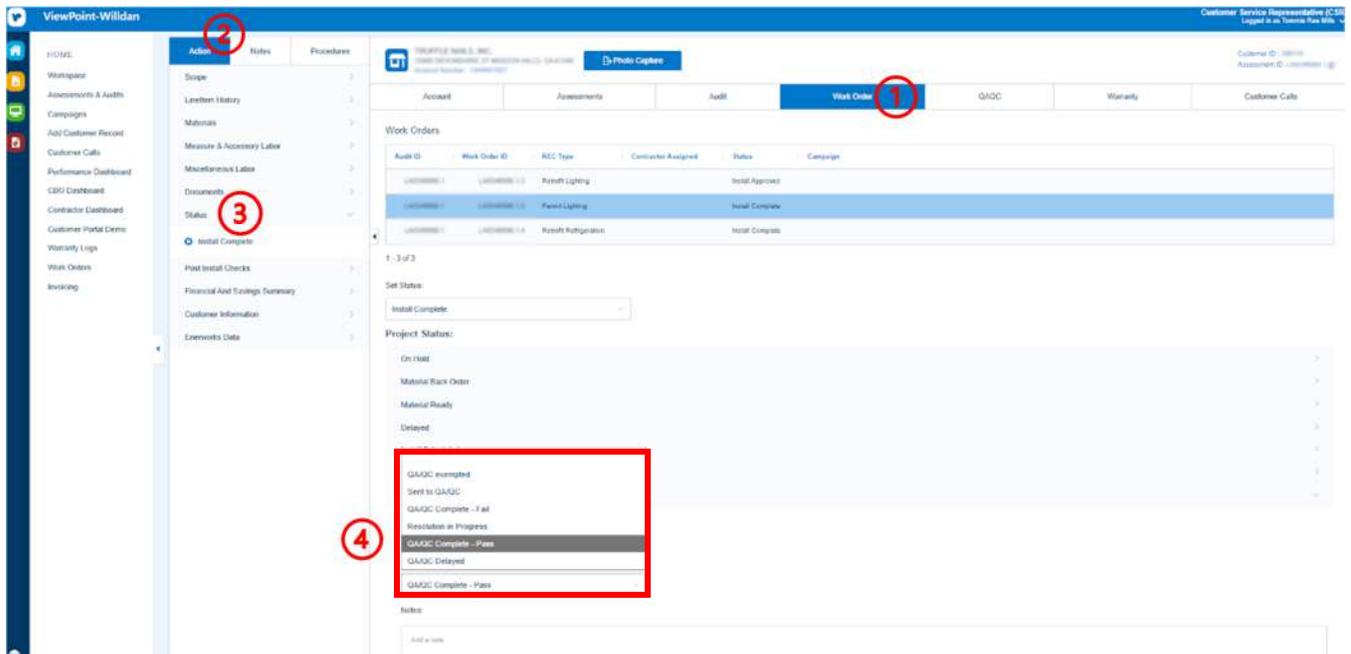


*Figure 17 – Post Inspection QA/QC Complete- Pass*

## 4.3.5 – Recording the Final Inspection Result

Once the QA/QC process is completed it is time to finalize the QA/QC process.  To do this the Final Inspection Result must be formally recorded in the system. Recording this final step provides a clear, auditable trail confirming the project's readiness for the next phase.

This step is critical to:

- Ensure the QA/QC process is fully documented

- Indicate that the project has met all inspection requirements

- Allow the project to proceed to closeout and billing preparation

To record the Final Inspection Result:

1. Navigate to the **QA/QC** tab

2. In the **Action Panel** on the left-hand side, click **QA/QC Details**

3. Choose the appropriate result from the **Inspection Result** dropdown menu (**Pass**, **Fail**)

4. Click **Save**
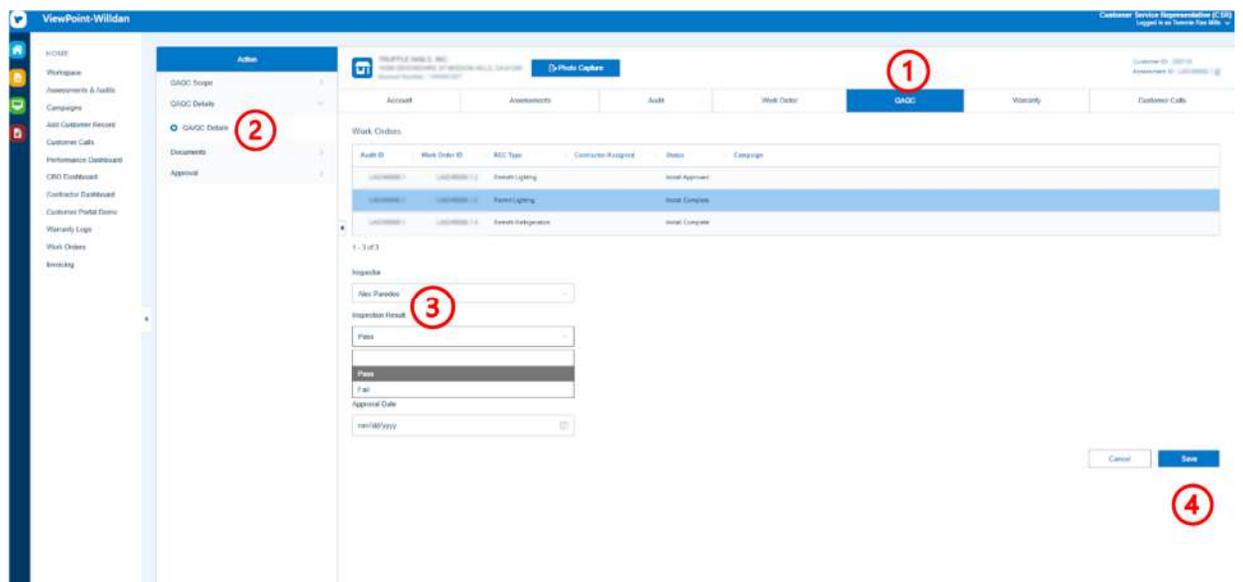
# 5. Conclusion

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

To contact Willdan support regarding the QA/QC Process User Guide, send an email to:

WES-Technology-Operations@willdan.com

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