

ViewPoint Audit Creation & Submittal User Guide

Technology Operations

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.

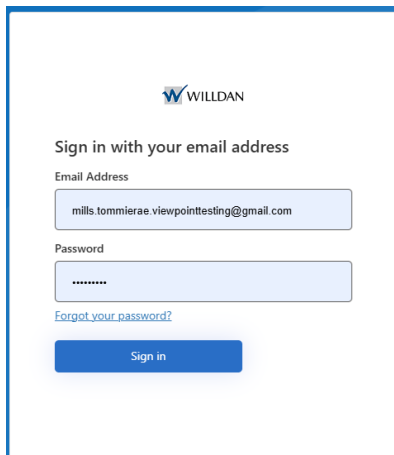
2.1 - Confirming Your Willdan-assigned Login

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

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.

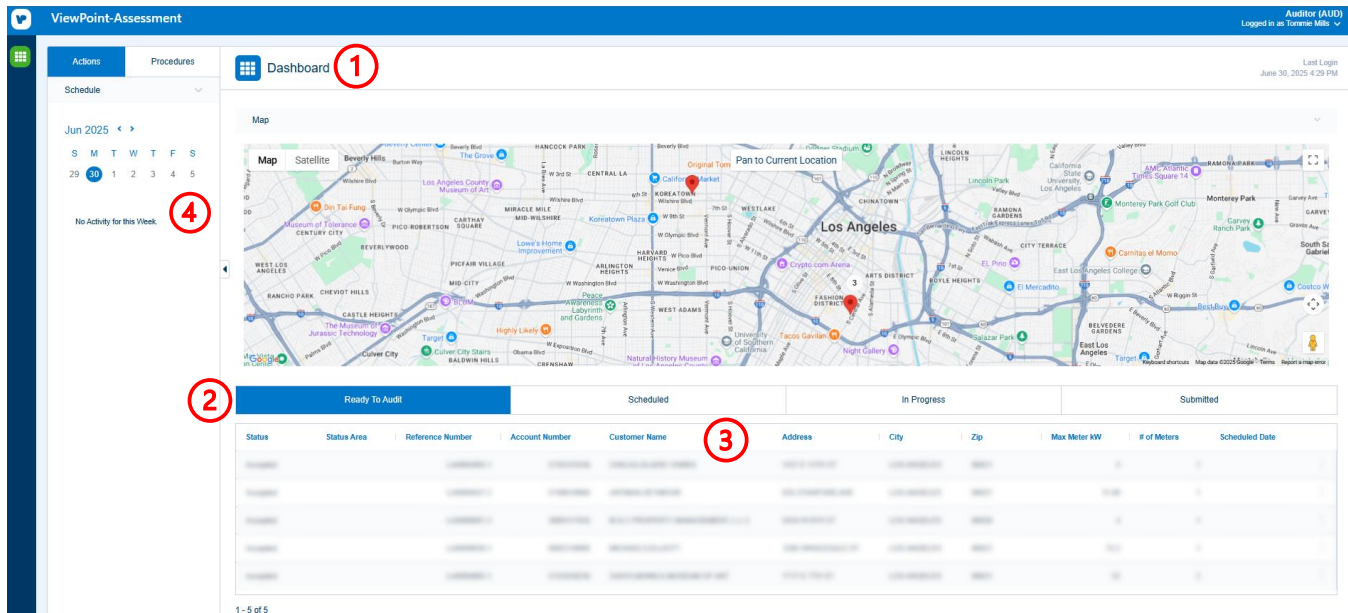


Figure 2 – Auditor Dashboard Default Screen – Four Sections of the Application List View

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		LAM0001-2	000111000	W & C PROPERTY MANAGEMENT, L.L.C.	3434 W 6TH ST	LOS ANGELES	90020			
Accepted		LAM0040-1	010000000	CHICAGO BLADE TENNIS	1107 E 11TH ST	LOS ANGELES	90021			
Accepted		LAM0040-2	010000000	ANTHONY DETMOLD	800 STANFORD AVE	LOS ANGELES	90021			
Accepted		LAM0000-1	000210000	MICHAEL ELLIOTT	1200 WHOLESALE ST	LOS ANGELES	90021			
Accepted		LAM0000-1	010000000	SANTA MONICA MUSEUM OF ART	1717 E 7TH ST	LOS ANGELES	90021	50	50	

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.

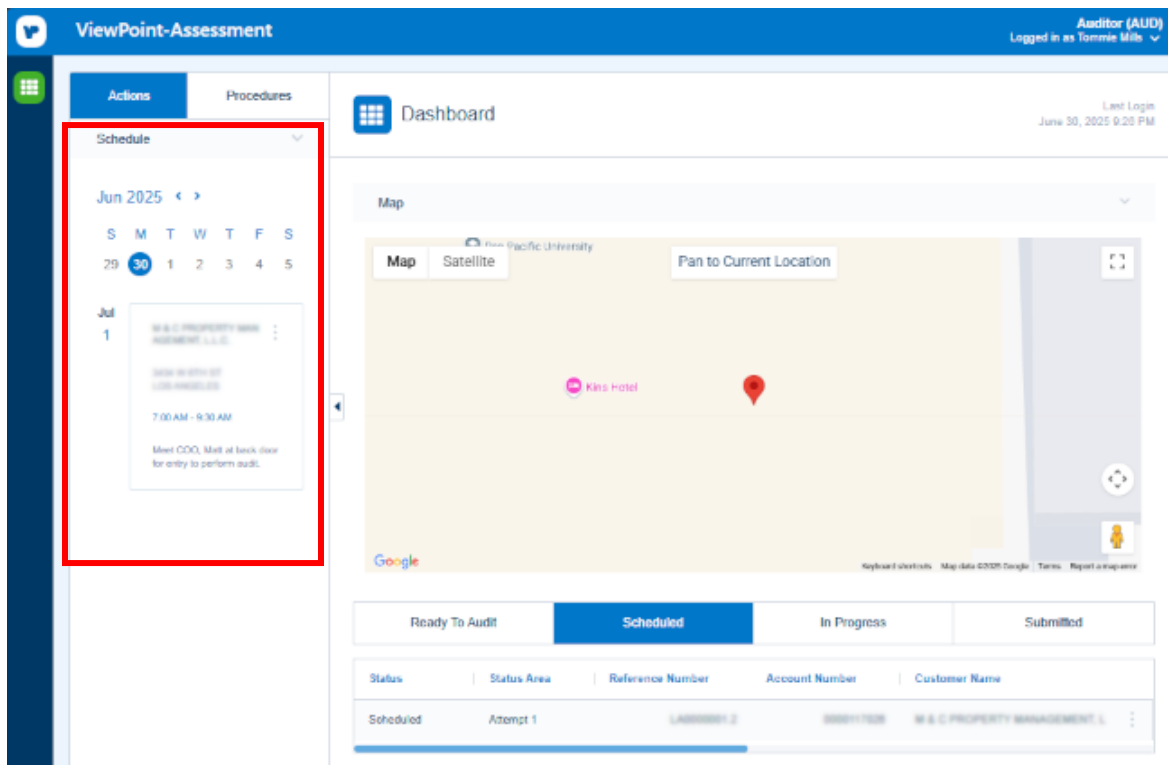


Figure 6 – Calendar of Scheduled Audits

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							<ul style="list-style-type: none"> 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.

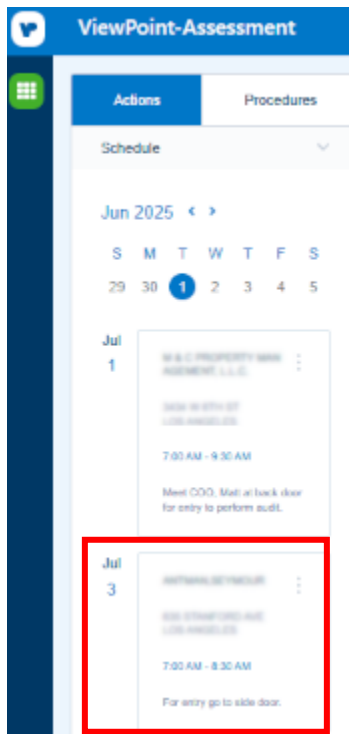


Figure 9 – Scheduling an Audit in Calendar – Audit Appointment Scheduled

3.4.2 – Scheduling an Audit under Assessment

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

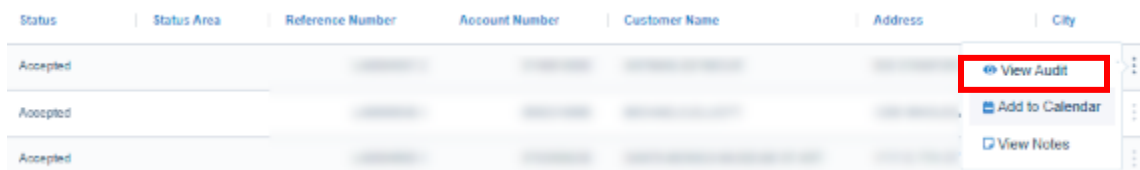


Figure 10 – Scheduling an Audit under Assessment – View Audit

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

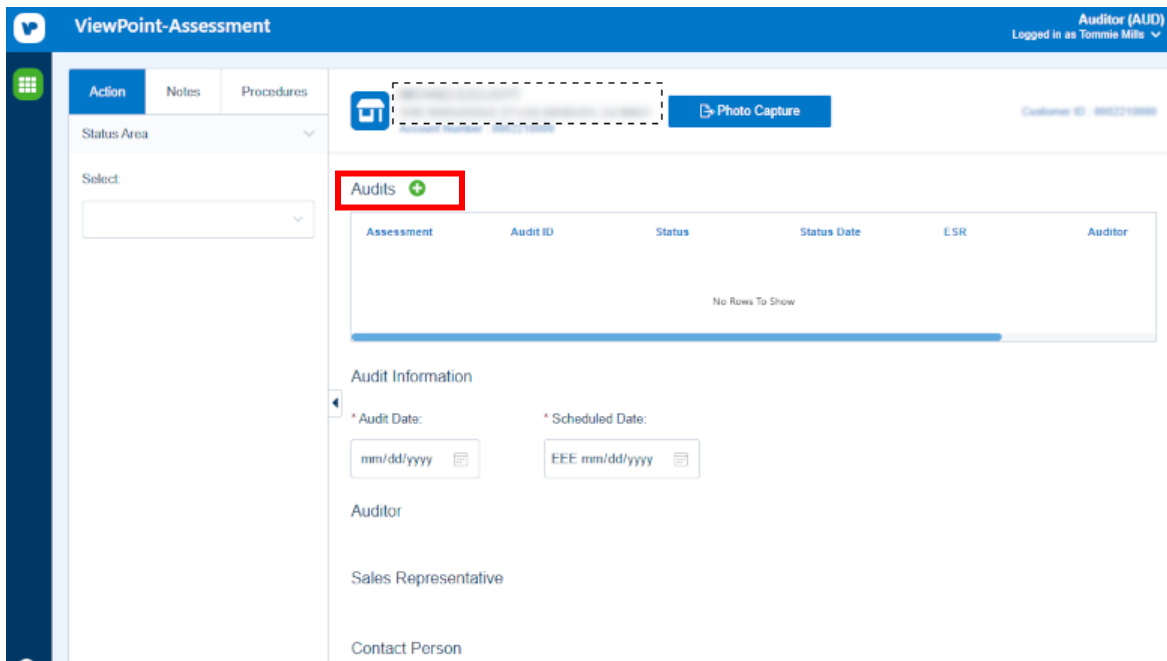


Figure 11 – Scheduling an Audit under Assessment – Audits

3. Enter Scheduled Date

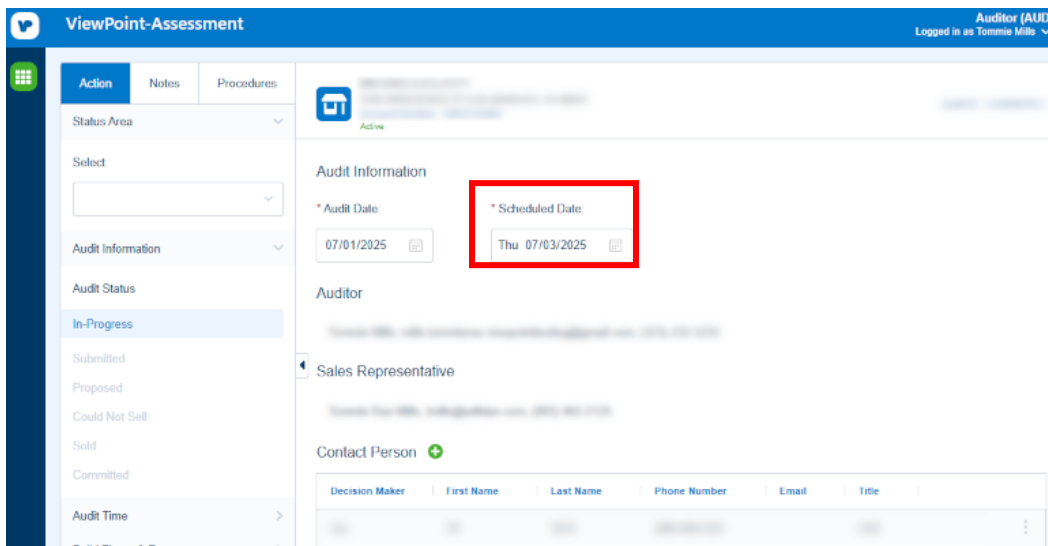


Figure 12 – Scheduling an Audit under Assessment – Scheduled Date

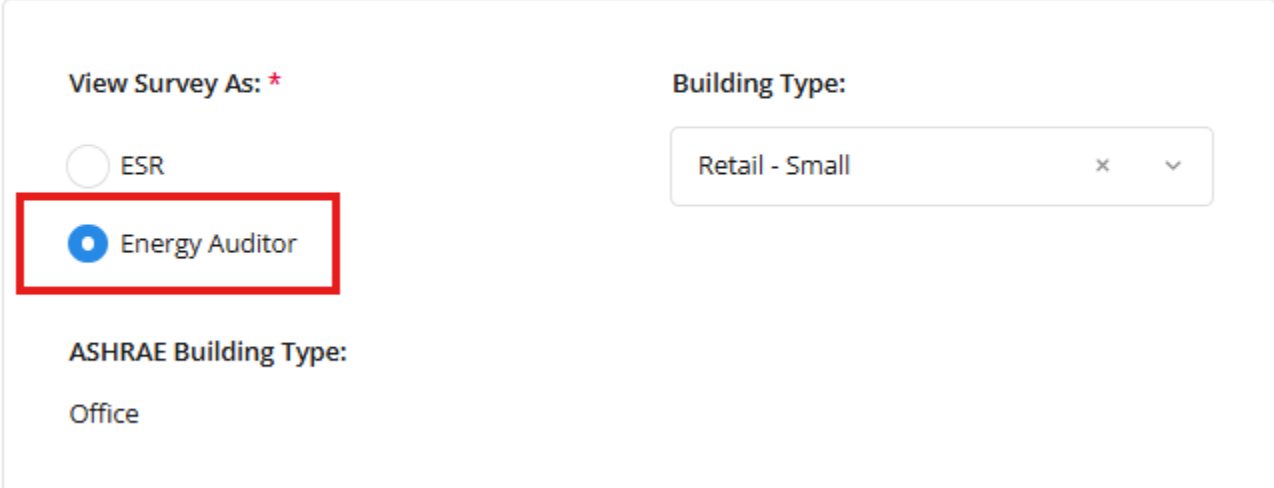
4. HPWH Survey

Before beginning the Heat Pump Water Heater (HPWH) audit, a preliminary survey must be completed. This survey gathers the necessary information to determine whether the installation is feasible and what upgrades may be required. The survey has questions based on trade expertise. Plumbers are responsible for completing all plumbing-related questions, including details about the existing water heater, piping configuration, drainage, and installation location. Electricians are responsible for completing all electrical-related questions, such as panel capacity, circuit availability, and wiring requirements. Completing this survey ensures that both the plumbing and electrical conditions are properly evaluated before the formal audit process begins. To start the HPWH survey, scroll to the bottom of the Assessment page.

4.1.1 – View Survey As

1. Select “Energy Auditor”
2. Confirm Building Type

HPWH Survey



View Survey As: *

ESR

Energy Auditor

Building Type:

Retail - Small x v

ASHRAE Building Type:

Office

Figure 13 – HPWH Survey – View Survey As

4.1.2 – Survey View

The survey can be viewed either with or without the Energy Service Representative’s (ESR’s) responses visible. To view the ESR’s responses, click “Display ESR Responses.” This option allows users to see the information previously provided by the ESR while reviewing or completing the survey. The ESR responses will be clearly noted. Energy Auditors should record their findings in the “EA Response” fields as they review and complete the survey. For example purposes this guide will opt to view the ESR responses.

1. Select “Display ESR Responses”
2. Review ESR Responses
3. Enter Water Heater Name
4. Enter Audit Line Item No.
5. Answer Question in EA Response Field

Water Heater

Water Heater 1

Survey View:

1 Display ESR Responses

Water Heater Name: 3
Bradford White

Audit Line Item No. : 4

2 Is the current water heater a split (separate tank), unitary (integrated tank), or instantaneous heater? *
ESR Response:
Unitary

Is the current water heater a split (separate tank), unitary (integrated tank), or instantaneous heater? *
EA Response: 5
Select...

Figure 14 – HPWH Survey – Survey View

4.1.3 – HPWH Guardrail Tool - Plumbing Questions

The Survey has multiple sections, at the end of each section click “Next” to continue the survey.

1. General Questions Existing Unit/Usage

HPWH GUARDRAIL TOOL

<p>Is the Current Water Heater Gas or Electric Resistance? * ESR Response:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Gas</div>	<p>Heating element Input Units ESR Response:</p> <p>BTU/Hr</p>	<p>What is the current Water Heater (Input BTU/hr for Gas or kW for Electric)? * ESR Response:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">40000</div>	<p>What is the Water Heater Tank Size in Gallons? * ESR Response:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">40</div>
<p>Is the Current Water Heater Gas or Electric Resistance? * EA Response:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Gas x</div>	<p>Heating element Input Units EA Response:</p> <p>BTU/Hr</p>	<p>What is the current Water Heater (Input BTU/hr for Gas or kW for Electric)? * EA Response:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">40000</div>	<p>What is the Water Heater Tank Size in Gallons? * EA Response:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">40</div>

<p>Are there any major uses of hot water such as showers, large washing machines, mopping/cleaning? * ESR Response: (If YES, low priority)</p> <p>Yes <input type="radio"/> No <input checked="" type="radio"/></p>	<p>Is Hot Water Usage Periodic With Recovery Time or Hour After Hour of Similar Usage? * ESR Response: (If CONTINUOUS, low priority)</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Periodic</div>
<p>Are there any major uses of hot water such as showers, large washing machines, mopping/cleaning? * EA Response:</p> <p>Yes <input type="radio"/> No <input checked="" type="radio"/></p>	<p>Is Hot Water Usage Periodic With Recovery Time or Hour After Hour of Similar Usage? * EA Response:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">Periodic x</div>

<p>Does Customer Run Out of Hot Water? * ESR Response: (If YES, low priority)</p> <p>Yes <input type="radio"/> No <input checked="" type="radio"/></p>	<p>How long are the busy hot water usage periods (1, 2, 3, 4 hrs etc.) * ESR Response: (If OVER 1 HR, low priority)</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">1</div>
<p>Does Customer Run Out of Hot Water? * EA Response:</p> <p>Yes <input type="radio"/> No <input checked="" type="radio"/></p>	<p>How long are the busy hot water usage periods (1, 2, 3, 4 hrs etc.) * EA Response:</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;">1</div>

<p>Is this water heater a part of a multi-unit water heater loop system? * ESR Response: (If YES, low priority)</p> <p>Yes <input type="radio"/> No <input checked="" type="radio"/></p>	<p>Is this water heater a part of a multi-unit water heater loop system? * EA Response:</p> <p>Yes <input type="radio"/> No <input checked="" type="radio"/></p>
<p>Does the Water Heater have a Recirculating Pump? * ESR Response: (If YES, low priority)</p> <p>Yes <input type="radio"/> No <input checked="" type="radio"/></p>	<p>Does the Water Heater have a Recirculating Pump? * EA Response:</p> <p>Yes <input type="radio"/> No <input checked="" type="radio"/></p>

Remove Water Heater

[Add Water Heater](#)

1 of 1

Next

Figure 15 – HPWH Survey – HPWH Guardrail Tool – Plumbing Questions - General Questions

2. Room Spacing

Room Spacing

Considering the required clearance on the sides, back, and top of the unit, will the current space accommodate a wider unit (8 in-1 ft wider and taller)?

ESR Response: Yes No

Is there space in the same room or adjacent room that could house the HPWH?

ESR Response: Yes No

Considering the required clearance on the sides, back, and top of the unit, will the current space accommodate a wider unit (8 in-1 ft wider and taller)? *

EA Response: Yes No

Figure 16 – HPWH Survey – HPWH Guardrail Tool – Plumbing Questions – Room Spacing

3. Room Dimensions

What are the dimensions (in feet) of the room where the HPWH is to be located?

Room Length	Room Width	Room Height	Room Volume
ESR Response: 12	ESR Response: 14	ESR Response: 10	ESR Response: 1680
EA Response: 12	EA Response: 14	EA Response: 10	EA Response: 1680

Are there any room obstructions that need to be considered prior to installing a new HPWH?

ESR Response: Yes No

Are there any room obstructions that need to be considered prior to installing a new HPWH? *

EA Response: Yes No

Figure 17 – HPWH Survey – HPWH Guardrail Tool – Plumbing Questions – Room Dimensions

4. Volume of Room

Volume of Room - Free Air Excluding Obstructions (Ventilation is required if less than 700 Cubic Feet)

Room Volume Minus Obstruction Volume
EA Response:
1680

Does the space have adequate ventilation?
ESR Response:
 Yes No

Does the space have adequate ventilation? *
EA Response:
 Yes No

Is there a floor drain in the room?
ESR Response:
 Yes No

Is there a floor drain in the room? *
EA Response:
 Yes No

Could a simple ventilation modification to the area be made?
ESR Response:
 Yes No

Is there an easy way to run a condensation line (i.e. can it be run to a nearby sink, outside wall)?
ESR Response:
 Yes No

How many feet to the nearest drain?
EA Response:

Where is the water heater located?
ESR Response:

Where is the water heater located? *
EA Response:

Is there easy access in and out of the space where the HPWH will go?
ESR Response:
 Yes No

Is there easy access in and out of the space where the HPWH will go? *
EA Response:
 Yes No

Figure 18 – HPWH Survey – HPWH Guardrail Tool – Plumbing Questions - Volume of Room

5. HPWH Fixture Survey Tool

HPWH FIXTURE SURVEY TOOL

Water Heater 1

Survey View:

Display ESR Responses

Basin, Public Lavatory ESR Count: <input type="text" value="1"/>	Basin, Public Lavatory * EA Count: <input type="text"/>	Service Sink ESR Count: <input type="text" value="0"/>	Service Sink * EA Count: <input type="text"/>
Clothes Washer (9&12lb) ESR Count: <input type="text" value="0"/>	Clothes Washer (9&12lb) * EA Count: <input type="text"/>	Clothes Washer (16lb) ESR Count: <input type="text" value="0"/>	Clothes Washer (16lb) * EA Count: <input type="text"/>
Are there dishwashers present? ESR Response: <input type="radio"/> Yes <input checked="" type="radio"/> No	Dishwasher (low) EA Count: <input type="text"/>	Dishwasher (med) EA Count: <input type="text"/>	Dishwasher (high) EA Count: <input type="text"/>
Kitchen Sink ESR Count: <input type="text" value="0"/>	Kitchen Sink * EA Count: <input type="text"/>		
Pantry Sink ESR Count: <input type="text" value="0"/>	Pantry Sink * EA Count: <input type="text"/>	Shower ESR Count: <input type="text" value="0"/>	Shower * EA Count: <input type="text"/>
Bathtub ESR Count: <input type="text" value="0"/>	Bathtub * EA Count: <input type="text"/>	Basin, Private Lavatory ESR Count: <input type="text" value="0"/>	Basin, Private Lavatory * EA Count: <input type="text"/>
Laundry Stationary Tub ESR Count: <input type="text" value="0"/>	Laundry Stationary Tub * EA Count: <input type="text"/>	Hydrotherapeutic Shower ESR Count: <input type="text" value="0"/>	Hydrotherapeutic Shower * EA Count: <input type="text"/>
Hubbard Bath ESR Count: <input type="text" value="0"/>	Hubbard Bath * EA Count: <input type="text"/>	Leg Bath ESR Count: <input type="text" value="0"/>	Leg Bath * EA Count: <input type="text"/>
Arm Bath ESR Count: <input type="text" value="0"/>	Arm Bath * EA Count: <input type="text"/>	Sitz Bath ESR Count: <input type="text" value="0"/>	Sitz Bath * EA Count: <input type="text"/>
Continuous-flow Bath ESR Count: <input type="text" value="0"/>	Continuous-flow Bath * EA Count: <input type="text"/>	Circular Wash Sink ESR Count: <input type="text" value="0"/>	Circular Wash Sink * EA Count: <input type="text"/>
Semicircular Wash Sink ESR Count: <input type="text" value="0"/>	Semicircular Wash Sink * EA Count: <input type="text"/>	Foot Basin ESR Count: <input type="text" value="0"/>	Foot Basin * EA Count: <input type="text"/>

[Remove](#)

[Add new](#) 1 of 1

[Previous](#) [Complete](#)

Figure 19 – HPWH Survey – HPWH Guardrail Tool – Plumbing Questions – HPWH Fixture Survey Tool

6. Complete Survey

[Previous](#) [Complete](#)

Figure 21 – HPWH Survey – HPWH Guardrail Tool – Plumbing Questions – HPWH Fixture Survey Tool

4.1.4 – HPWH Guardrail Tool - Electrical Questions

**Note there are no ESR responses to review for the Electrical Questions.*

How far is the HPWH location to the electrical panel or subpanel in feet?

EA Response:

Is the Electrical Panel in a different room?

EA Response:

 Yes No

Is the Electrical Panel on a different floor?

EA Response:

 Yes No

If conduit needs to run to a different room is there easy access through attic or utility chase?

EA Response:

 Yes No

Linear feet of conduit and wire from HPWH to panel

EA Response:

Does the electrical panel have space and capacity for a 220V 30 Amp breaker?

EA Response:

 Yes No

Does the age of the panel suggest outdated breakers?

EA Response:

 Yes No

Is panel located in a wet or damp area (may need GFCI breakers)?

EA Response:

 Yes No

Is the panel an emergency panel or served by a backup generator?

EA Response:

Figure 22 – HPWH Survey – HPWH Guardrail Tool – Electrical Questions

5. 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**.

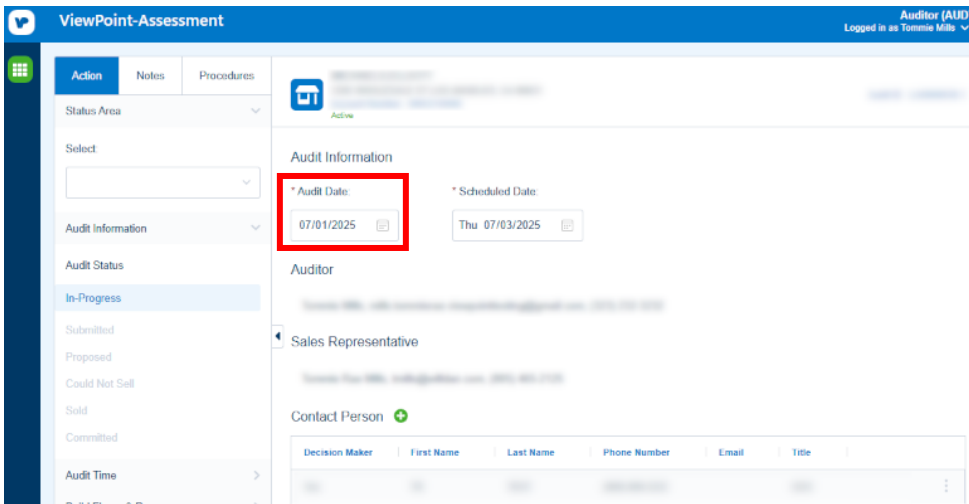


Figure 23 – Building an Audit – Audit Date

5.1 – 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.

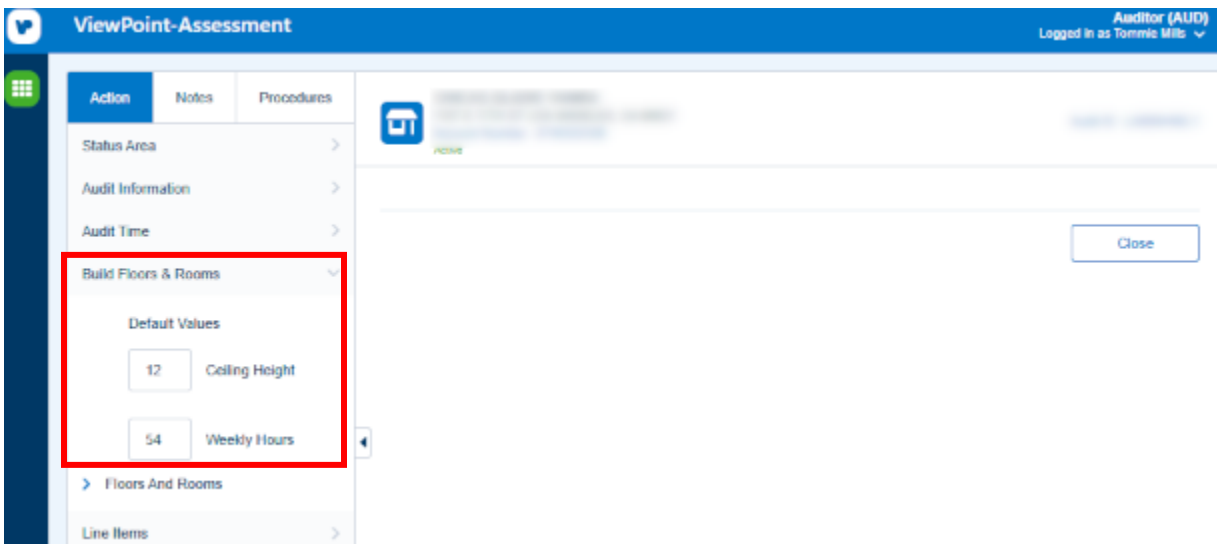


Figure 24 – Building an Audit – Building Floors & Rooms

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

5.1.1 – Adding a Floor

1. Click on Floors and Rooms and select Add Floor

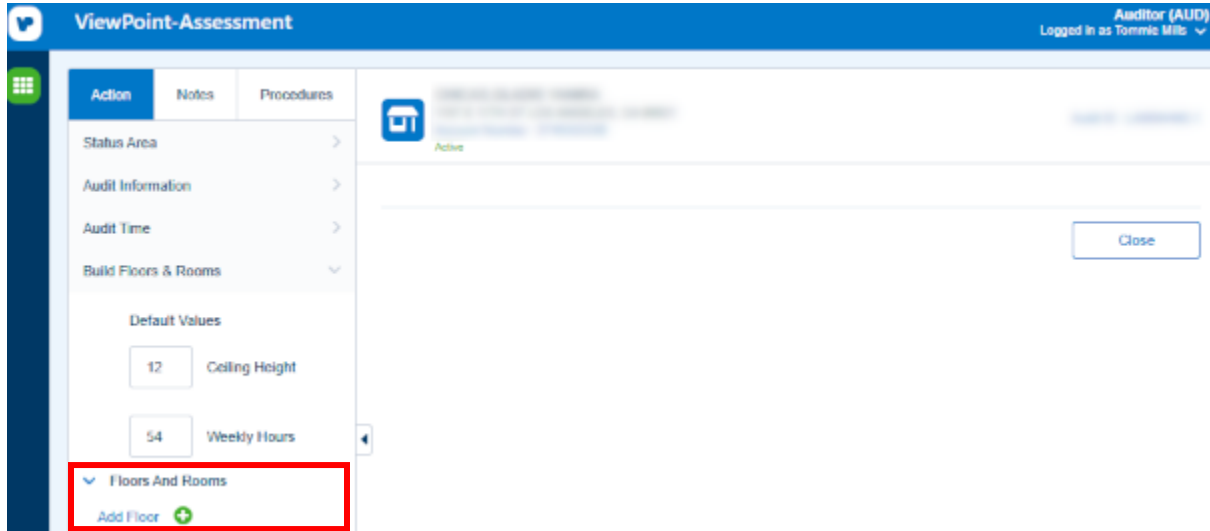


Figure 25 – Building an Audit – Adding Floor

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

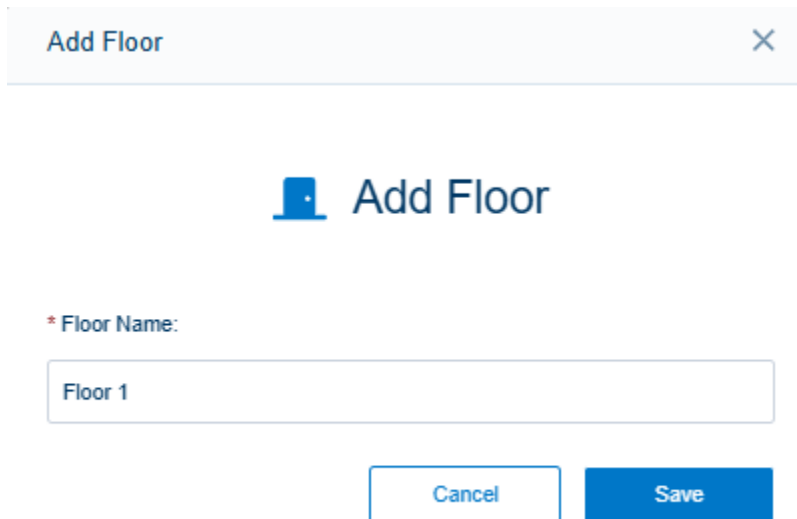


Figure 26 – Building an Audit – Adding Floor Name

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

5.1.2 – 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.

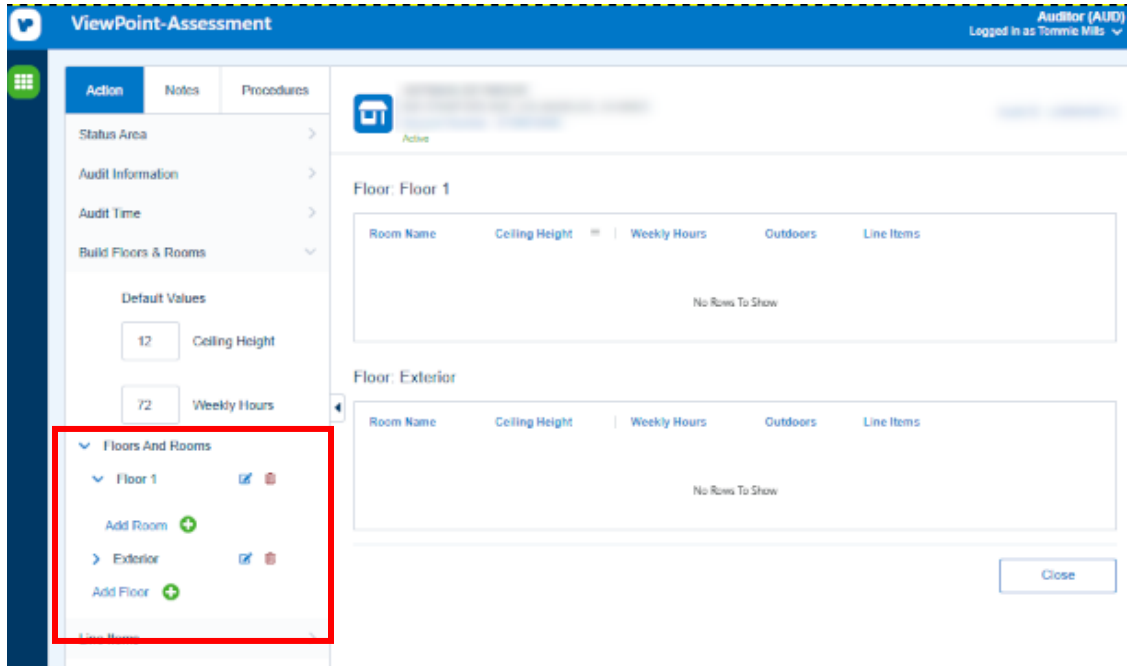


Figure 27 – Building an Audit – Adding a Room

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 28 – Building an Audit – Adding Room Details

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

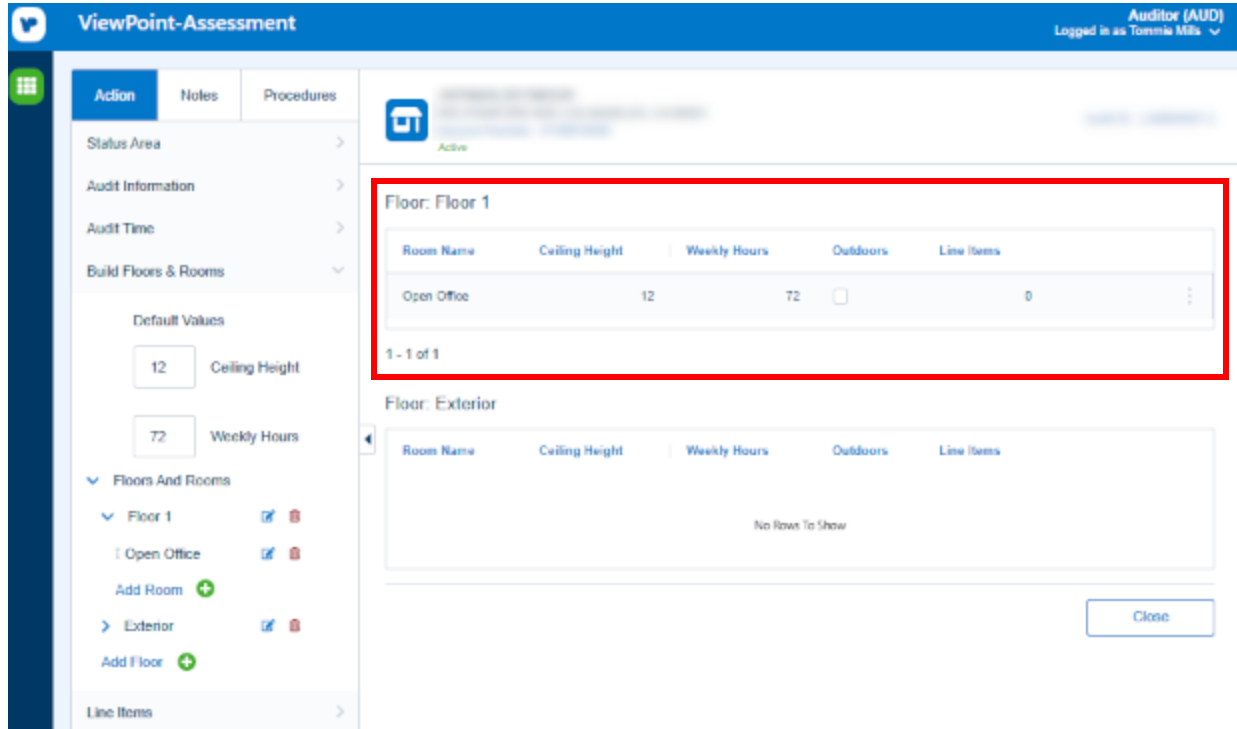


Figure 29 – Building an Audit – Built Room

5.2 – Adding Line Items – Lighting, Refrigeration, Anti Sweater Heater Control

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.

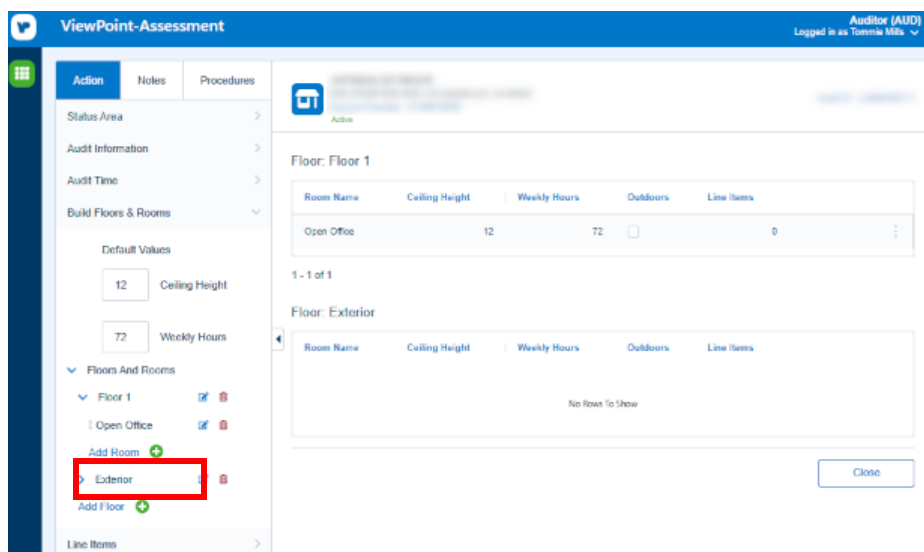


Figure 30 – Building an Audit – Selecting Room

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.

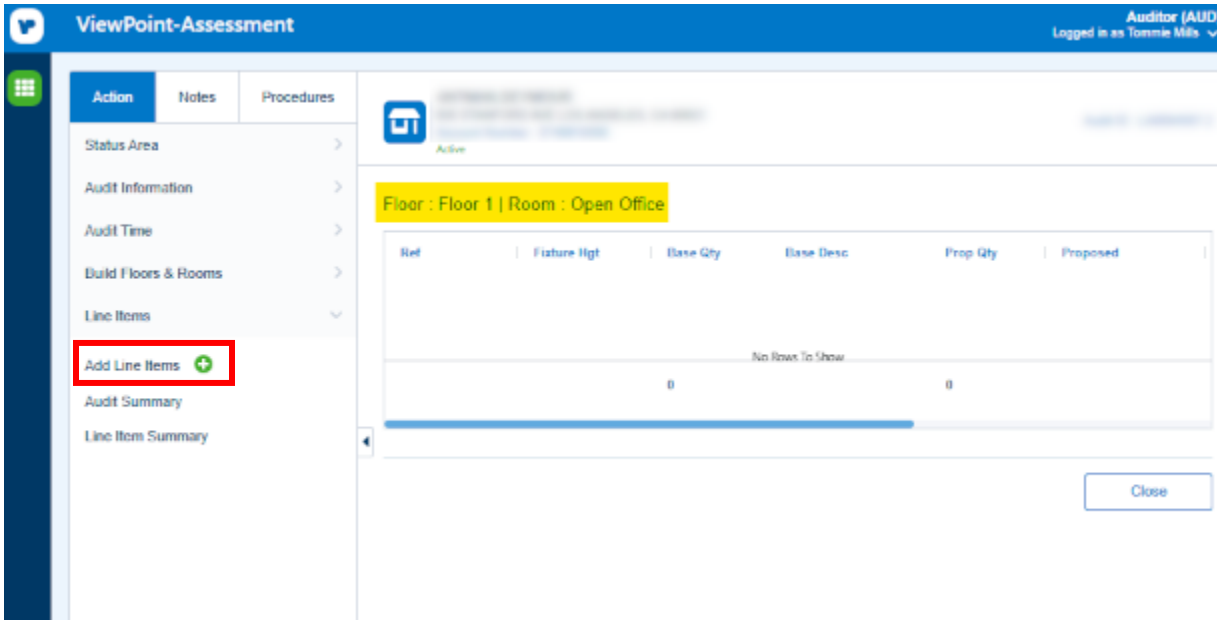


Figure 31 – Building an Audit – Add Line Items

5.2.1 – Measure Type

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

1. Water
2. Lighting
3. Refrigeration
4. Non-ECM
5. Heat Pump Water Heater
6. Anti-Sweat Heater Control

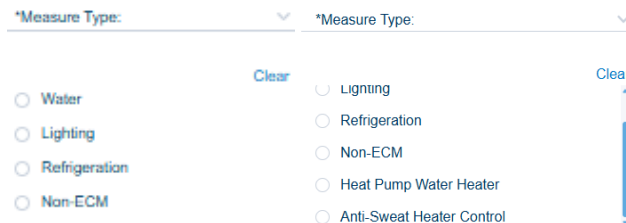


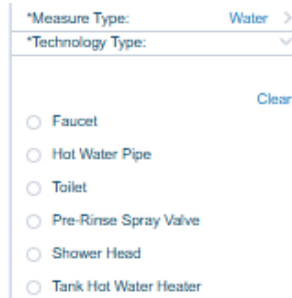
Figure 32 – Building an Audit – Measure Type

5.2.2 – 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



*Measure Type: Water >

*Technology Type: ▾

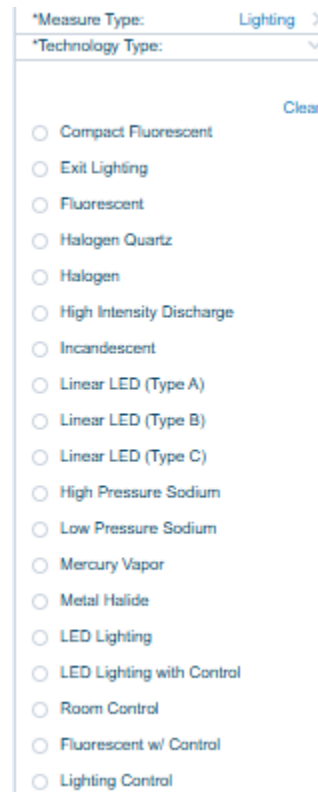
Clear

- Faucet
- Hot Water Pipe
- Toilet
- Pre-Rinse Spray Valve
- Shower Head
- Tank Hot Water Heater

Figure 33 – 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



*Measure Type: Lighting >

*Technology Type: ▾

Clear

- Compact Fluorescent
- Exit Lighting
- Fluorescent
- Halogen Quartz
- Halogen
- High Intensity Discharge
- Incandescent
- Linear LED (Type A)
- Linear LED (Type B)
- Linear LED (Type C)
- High Pressure Sodium
- Low Pressure Sodium
- Mercury Vapor
- Metal Halide
- LED Lighting
- LED Lighting with Control
- Room Control
- Fluorescent w/ Control
- Lighting Control

Figure 34 – 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 35 – Building an Audit – Technology Type – Refrigeration

- 4. Non-ECM
- 5. Heat Pump Water Heater
 - a. Heat Pump Water Heater

*Measure Type: Heat Pump Water Heater >
*Technology Type: ▾

Clear

Heat Pump Water Heater

Figure 36 – Building an Audit – Technology Type – Heat Pump Water Heater

- 6. Anti-Sweat Heater Control
 - a. Anti Sweat Heater Control

*Measure Type: Anti-Sweat Heater Control >
*Technology Type: ▾

Clear

Anti Sweat Heater Control

Figure 37 – Building an Audit – Technology Type – Anti-Sweat Heater Control

5.2.3 – 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.

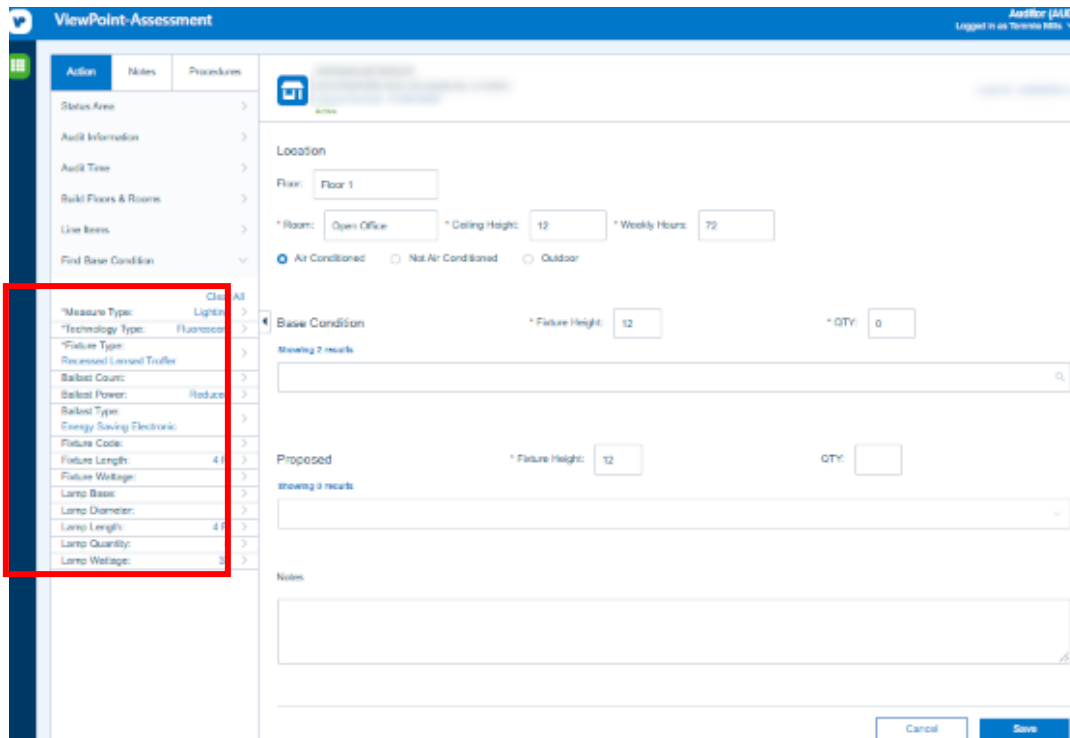
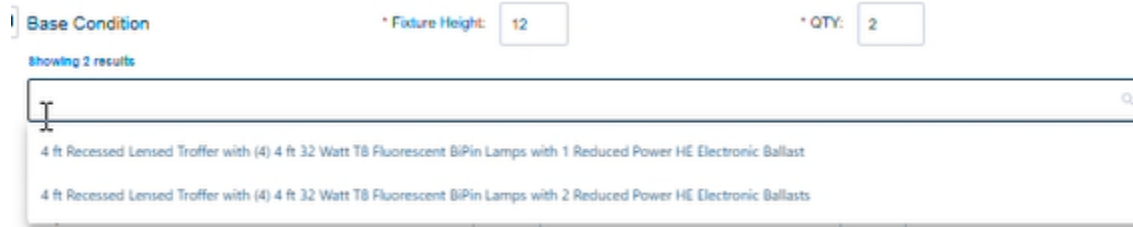


Figure 38 – Building an Audit – Technology Type – Detail Selection_Lighting

5.2.4 – 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.



Base Condition * Fixture Height: 12 * QTY: 2

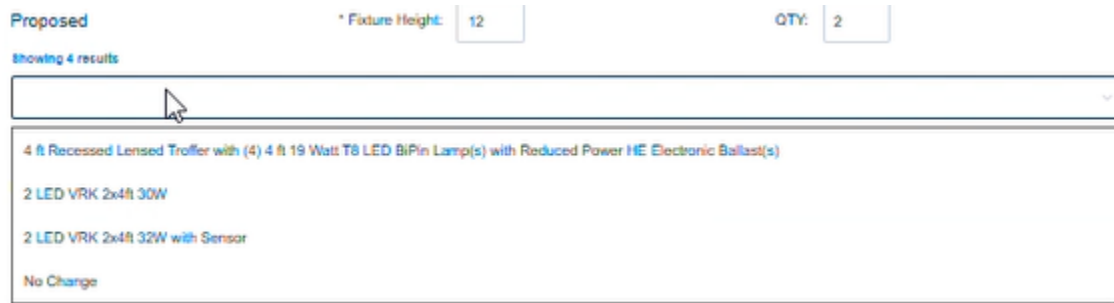
Showing 2 results

- 4 ft Recessed Lensed Troffer with (4) 4 ft 32 Watt T8 Fluorescent BiPin Lamps with 1 Reduced Power HE Electronic Ballast
- 4 ft Recessed Lensed Troffer with (4) 4 ft 32 Watt T8 Fluorescent BiPin Lamps with 2 Reduced Power HE Electronic Ballasts

Figure 39 – Building an Audit – Technology Type – Base Condition Selection

5.2.5 – Proposed Condition

Select Proposed Condition from drop down menu.



Proposed * Fixture Height: 12 QTY: 2

Showing 4 results

- 4 ft Recessed Lensed Troffer with (4) 4 ft 19 Watt T8 LED BiPin Lamp(s) with Reduced Power HE Electronic Ballast(s)
- 2 LED VRK 2x4ft 30W
- 2 LED VRK 2x4ft 32W with Sensor
- No Change

Figure 40 – Building an Audit – Technology Type – Proposed Condition Selection

5.2.6 – Material Selection

Select Material for the Proposed Condition.



* Material Selection

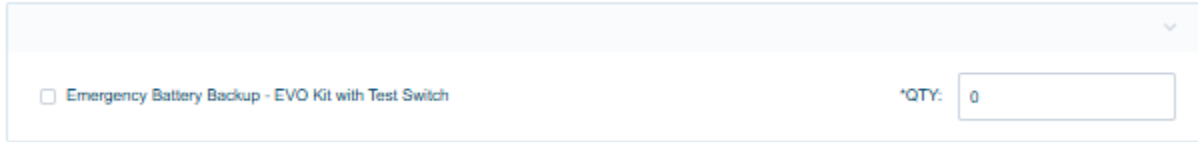
- 2x4 40K troffer kit with Sensor
- 2x4 50K troffer kit with Sensor
- 2x4 35K troffer kit with Sensor

Figure 41 – Building an Audit – Technology Type – Material Selection

5.2.7 – 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.

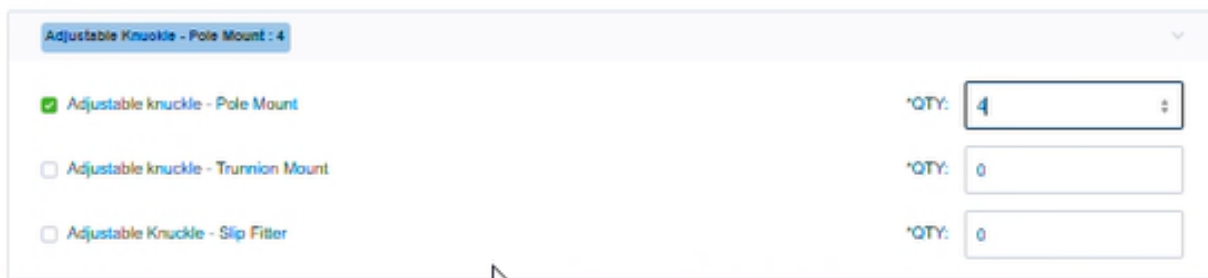
Add Accessory



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

Figure 42 – Building an Audit – Technology Type – Add Accessory Example 1

Add Accessory



Adjustable knuckle - Pole Mount *QTY: 4

Adjustable knuckle - Trunnion Mount *QTY: 0

Adjustable Knuckle - Slip Fitter *QTY: 0

Figure 43 – Building an Audit – Technology Type – Add Accessory Example 2

5.2.8 – Notes

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

Notes

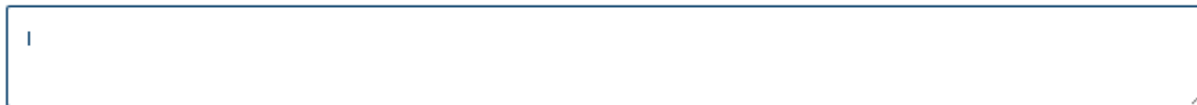


Figure 44 – Building an Audit – Technology Type – Line-Item Notes

5.2.9 – Save Line-Item

To save the line-item, just below the Notes section is the Save button. Click the “Save” button to save line-item entry

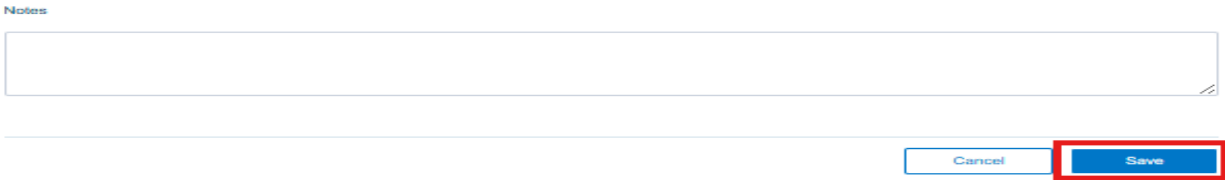


Figure 45 – Building an Audit – Technology Type – Save Line-Item

5.2.10 – 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.

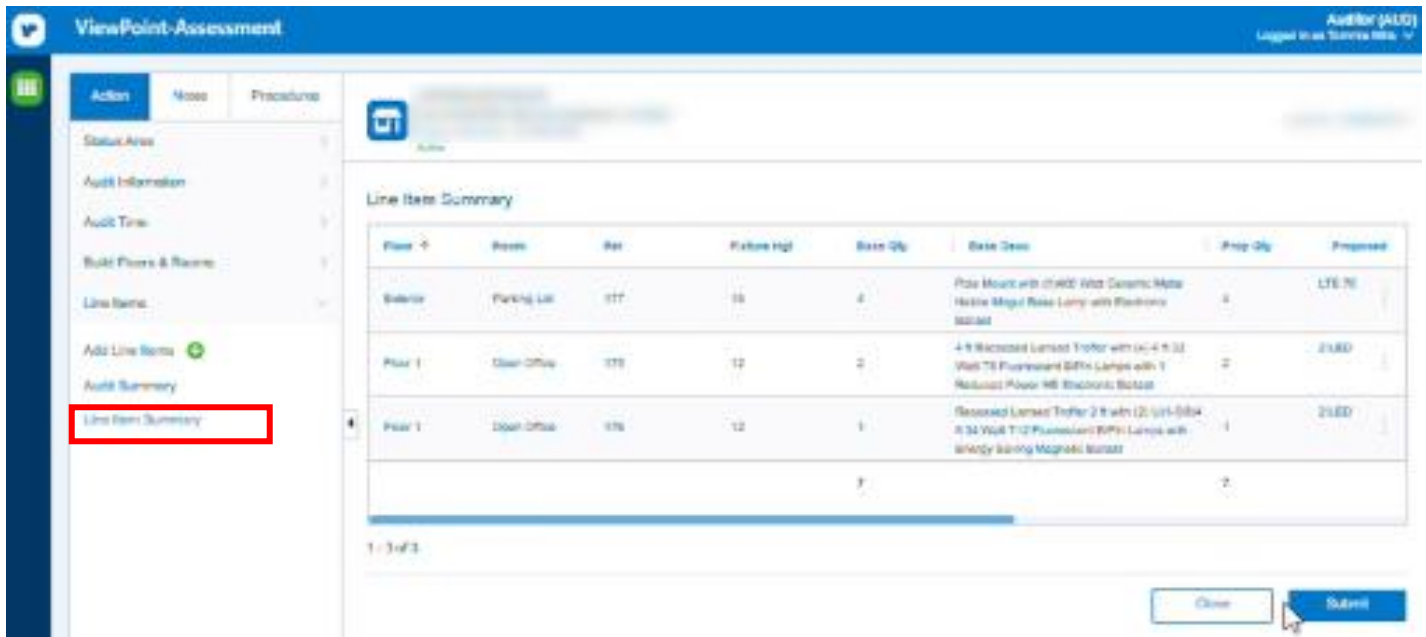


Figure 46 – Building an Audit – Technology Type – Line-Item Summary

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

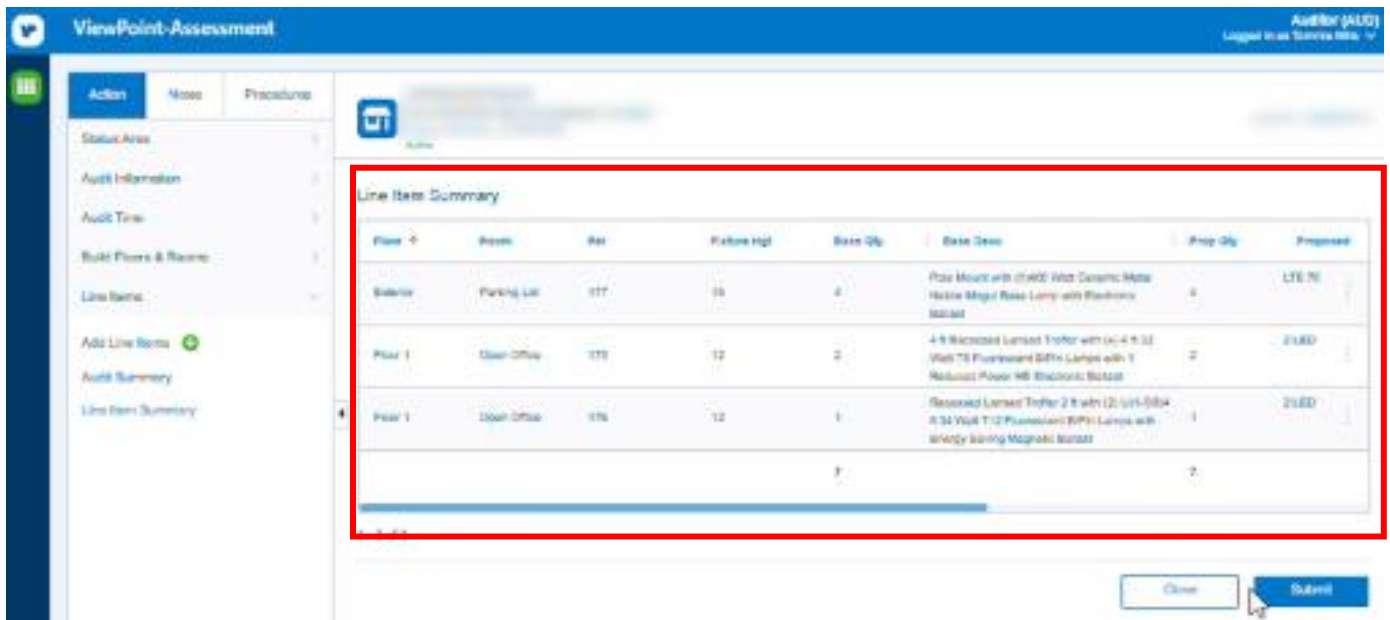


Figure 47– Building an Audit – Technology Type – Line-Item Summary Detail

5.3 – Adding Line-Items HPWH

5.3.1 – Technology Type Detail Selections – Plumbing

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

Action	Notes	Procedures
Status Area		>
Audit Information		>
Audit Time		>
Build Floors & Rooms		>
Line Items		>
Find Base Condition		∨
		Clear All
*Measure Type:		>
Heat Pump Water Heater		
*Technology Type:		>
Heat Pump Water Heater		
*Heating Fuel:	Gas	>
Storage Type:	Storage	>
Gallon Size:	50	>
UEF:	0.63	>

Figure 48 – Building an Audit – Adding Line-Items HPWH – Detail Selection Plumbing

Continue adding the line-item details by referring to instructions in section [5.2.4](#) through [5.2.10](#) to complete the line-item entry.

5.3.2 – Technology Type Detail Selections - Electrical

For HPWH line-item entry for Electrical Only

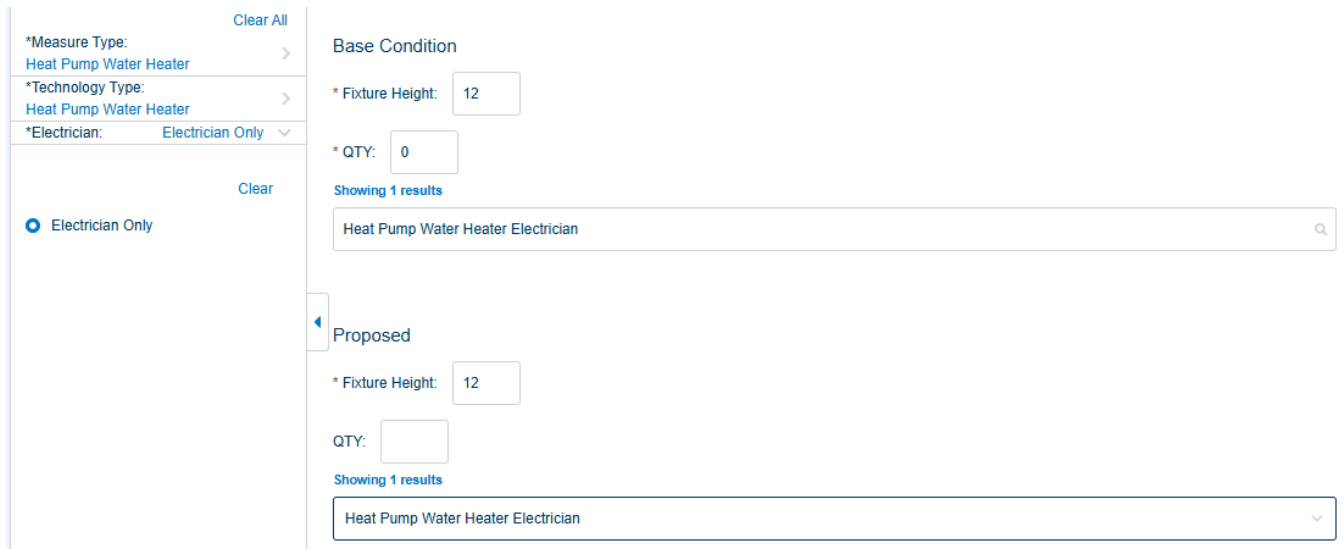
1. Select Measure Type
 - a. Heat Pump Water Heater
2. Select Technology Type
 - a. Heat Pump Water Heater
3. Select Electrician
 - a. Electrician Only

Action	Notes	Procedures
Status Area		>
Audit Information		>
Audit Time		>
Build Floors & Rooms		>
Line Items		>
Find Base Condition		∨
Clear All		
*Measure Type:		>
Heat Pump Water Heater		>
*Technology Type:		>
Heat Pump Water Heater		>
*Electrician:	Electrician Only	∨
Clear		
<input checked="" type="radio"/> Electrician Only		

Figure 49 – Building an Audit – Adding Line-Items HPWH – Detail Selection Electrical

5.3.3 – Base Condition & Proposed Condition HPWH - Electrical

The Base Condition and Proposed will auto populate.



The screenshot shows a software interface for adding line items. On the left, there are filter menus:

- *Measure Type: Heat Pump Water Heater
- *Technology Type: Heat Pump Water Heater
- *Electrician: Electrician Only

 Below these is a 'Clear All' button and a radio button for 'Electrician Only'. The main area is divided into two sections:

- Base Condition:**
 - * Fixture Height: 12
 - * QTY: 0
 - Showing 1 results
 - Search bar: Heat Pump Water Heater Electrician
- Proposed:**
 - * Fixture Height: 12
 - QTY: (empty)
 - Showing 1 results
 - Search bar: Heat Pump Water Heater Electrician

Figure 50 – Building an Audit – Adding Line-Items HPWH – Base Condition & Proposed Condition HPWH - Electrical

5.3.4 – Material Selection HPWH – Electrical

Select “Add any ancillary items needed for install below”



The screenshot shows a dropdown menu under the heading '* Material Selection'. The dropdown is open, displaying the text:

Add any ancillary items needed for install below

Figure 51 – Building an Audit – Adding Line-Items HPWH – Material Selection HPWH - Electrical

5.3.4 – Add Accessory HPWH – Electrical

Select all required accessories and note quantity for each accessory selected.

Add Accessory

Conduit Run Beyond 20' Of Standard Installation (Up To 100' Additional Length As Needed) : 1	Supply & Install Subpanel (Per Subpanel, Maximum 1 Per Project, As Needed) : 1	
<input checked="" type="checkbox"/> Conduit run beyond 20' of standard installation (up to 100' additional length as needed)		*QTY: 1
<input checked="" type="checkbox"/> Supply & install subpanel (per subpanel, maximum 1 per project, as needed)		*QTY: 1
<input type="checkbox"/> Supply & install exhaust fan (per fan, maximum of one per HPWH installed, as needed)		*QTY: 0

Figure 52 – Building an Audit – Adding Line-Items HPWH – Add Accessory HPWH – Electrical

Refer to instructions in section [5.2.8](#) through [5.2.10](#) to complete the line-item entry.

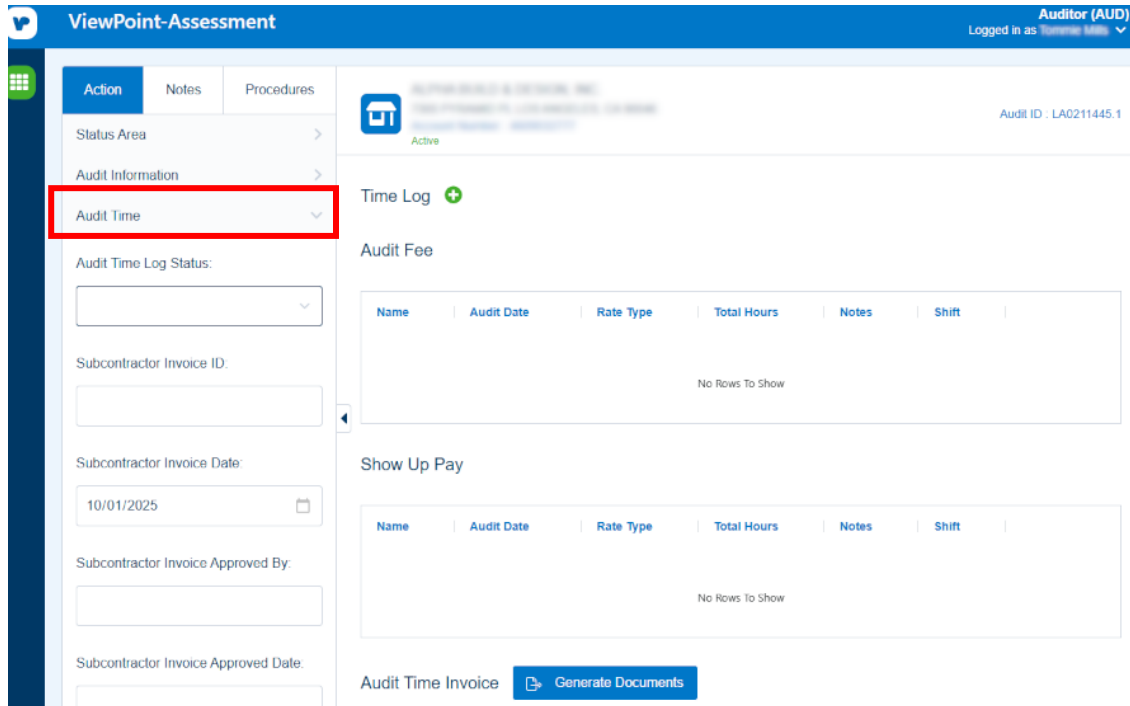
5.4 – Submitting Audit

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

5.4.1 – Audit Time Log

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

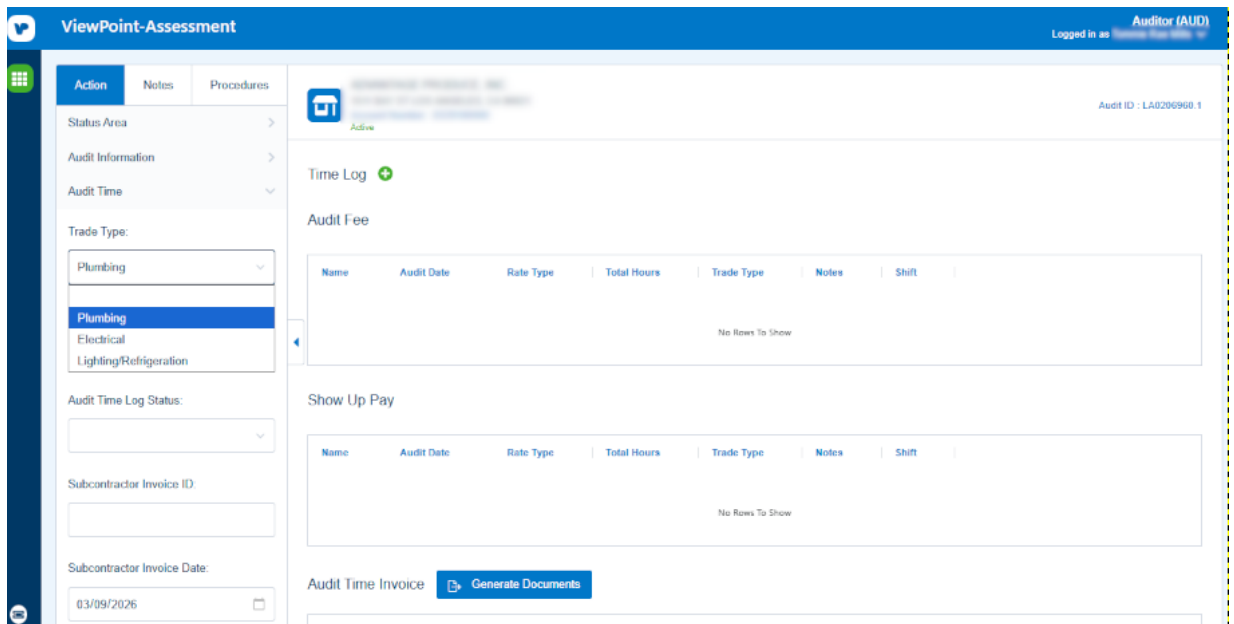
1. Click on Audit Time.



The screenshot shows the 'ViewPoint-Assessment' software interface. The top navigation bar is blue with the 'ViewPoint-Assessment' logo on the left and 'Auditor (AUD)' and 'Logged in as [Name]' on the right. The main content area is divided into a left-hand navigation menu and a main workspace. The navigation menu has three tabs: 'Action', 'Notes', and 'Procedures'. Under the 'Action' tab, there are several menu items: 'Status Area', 'Audit Information', 'Audit Time' (highlighted with a red box), 'Audit Time Log Status', 'Subcontractor Invoice ID', 'Subcontractor Invoice Date', 'Subcontractor Invoice Approved By', and 'Subcontractor Invoice Approved Date'. The main workspace shows the 'Audit ID - LA0211445.1' and 'Active' status. Below this, there are sections for 'Time Log' (with a green plus icon), 'Audit Fee', and 'Show Up Pay'. Each of these sections contains a table with columns for 'Name', 'Audit Date', 'Rate Type', 'Total Hours', 'Notes', and 'Shift'. The 'Time Log' and 'Show Up Pay' tables currently show 'No Rows To Show'. At the bottom of the workspace, there are buttons for 'Audit Time Invoice' and 'Generate Documents'.

Figure 53 – Audit Time Log – Audit Time

2. Select Trade Type and Save

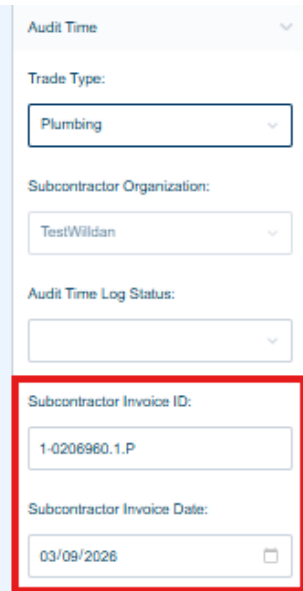


The screenshot shows the 'ViewPoint-Assessment' interface. On the left, there is a sidebar with a menu including 'Action', 'Notes', and 'Procedures'. The main area is titled 'Audit Time Log' and contains several sections: 'Audit Fee', 'Show Up Pay', and 'Audit Time Invoice'. The 'Trade Type' dropdown is set to 'Plumbing'. The 'Subcontractor Invoice ID' field is empty, and the 'Subcontractor Invoice Date' field is set to '03/09/2026'. A 'Generate Documents' button is visible at the bottom right.

Figure 54 – Audit Time Log – Trade Type

3. Once Saved the following fields will auto populate:

- a. Subcontractor Invoice ID
- b. Subcontractor Invoice Date



This close-up screenshot shows the 'Audit Time Log' form with the 'Trade Type' set to 'Plumbing'. The 'Subcontractor Invoice ID' field is auto-populated with the value '1-0206960.1.P', and the 'Subcontractor Invoice Date' field is auto-populated with the value '03/09/2026'. A red rectangular box highlights these two auto-populated fields.

Figure 55 – Audit Time Log – Trade Type - Auto populated Fields after Save

- Click on the Time Log Green Plus button

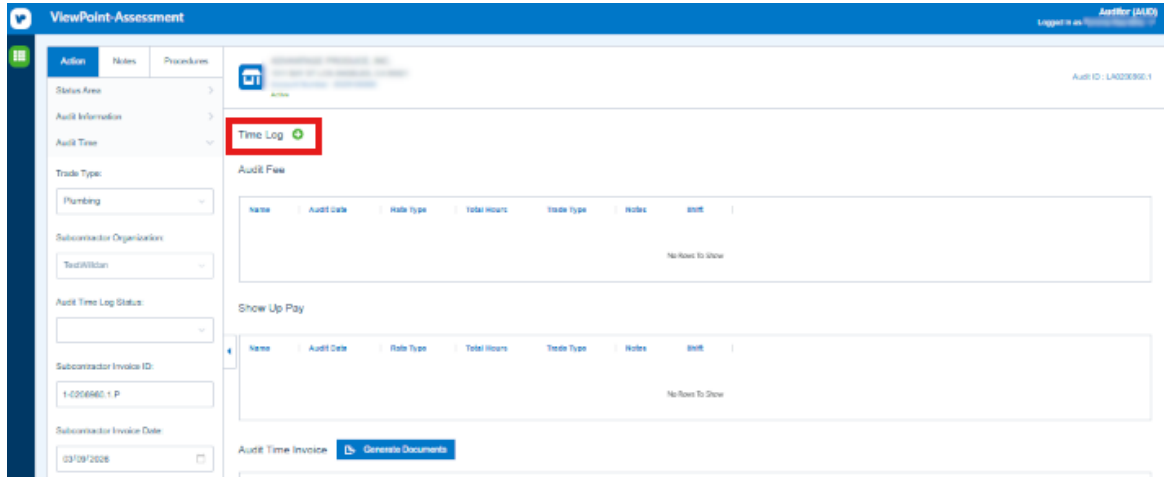


Figure 56 – Audit Time Log – Time Log

- A pop-up window will appear.

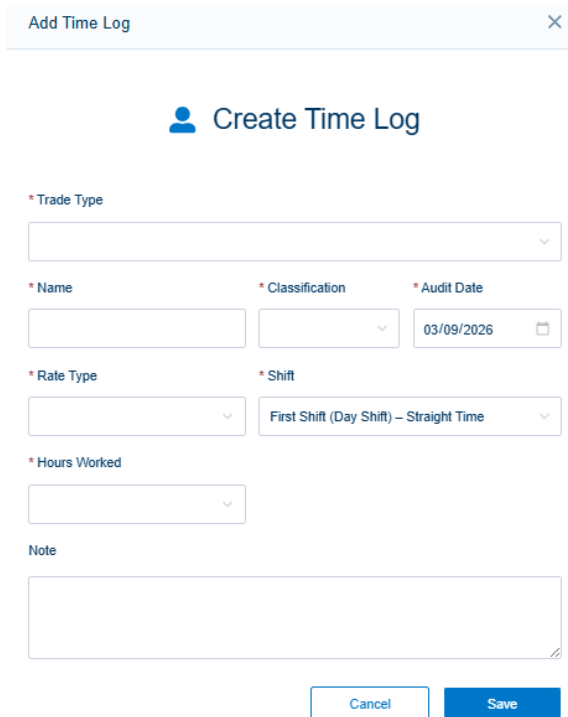
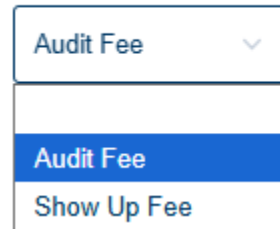


Figure 57 – Audit Time Log – Create Time Log

Enter the following required information and Save.

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

* Classification



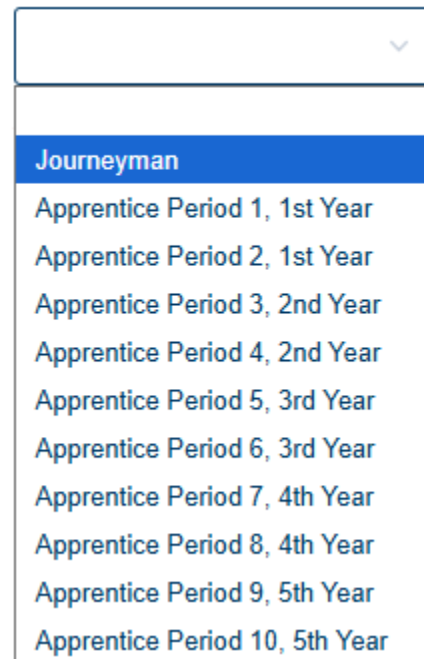
Audit Fee	▼
Audit Fee	
Show Up Fee	

i.

Figure 58 – Audit Time Log – Classification drop-down menu

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

* Rate Type



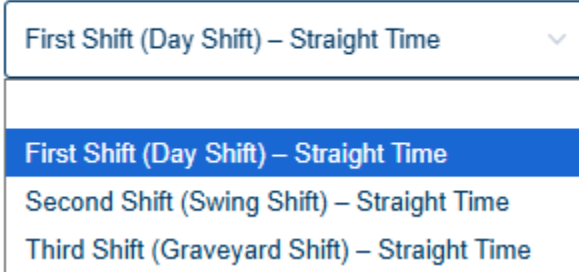
	▼
Journeyman	
Apprentice Period 1, 1st Year	
Apprentice Period 2, 1st Year	
Apprentice Period 3, 2nd Year	
Apprentice Period 4, 2nd Year	
Apprentice Period 5, 3rd Year	
Apprentice Period 6, 3rd Year	
Apprentice Period 7, 4th Year	
Apprentice Period 8, 4th Year	
Apprentice Period 9, 5th Year	
Apprentice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

i.

Figure 59 – Audit Time Log – Rate Type drop-down menu

- f. 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



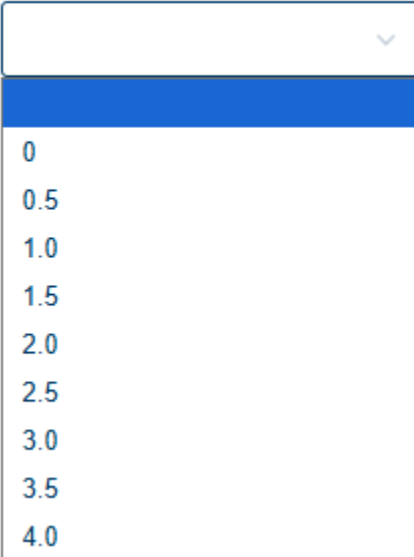
First Shift (Day Shift) – Straight Time	▼
First Shift (Day Shift) – Straight Time	
Second Shift (Swing Shift) – Straight Time	
Third Shift (Graveyard Shift) – Straight Time	

i.

Figure 60 – Audit Time Log – Shift drop-down menu

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

* Hours Worked




	▼
0	
0.5	
1.0	
1.5	
2.0	
2.5	
3.0	
3.5	
4.0	

Figure 61 – Audit Time Log – Hours Worked drop-down menu

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

Add Time Log ×

 Create Time Log

* Trade Type

* Name * Classification * Audit Date

* Rate Type * Shift

* Hours Worked

Note

Figure 62 – 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.

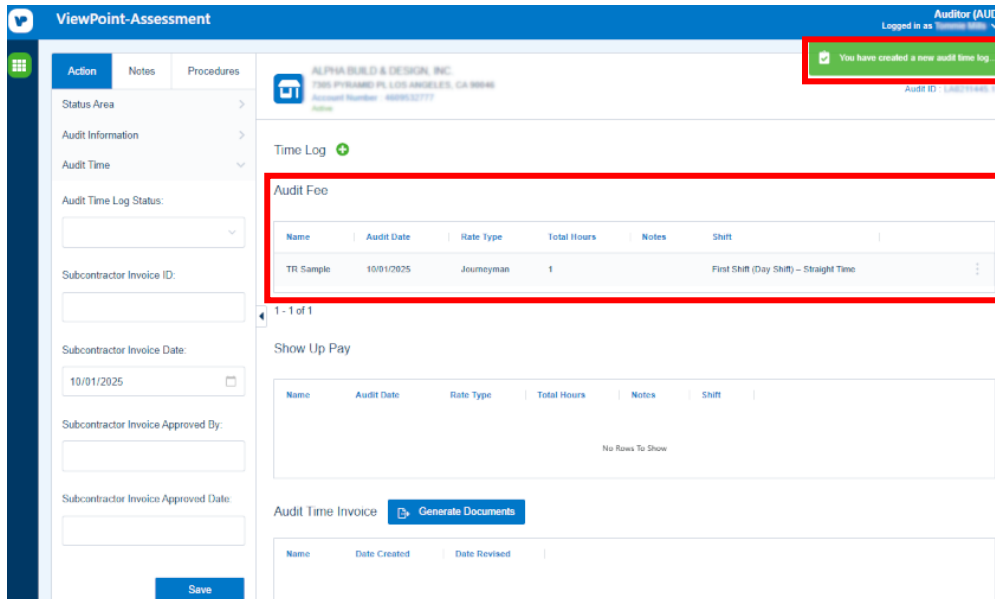


Figure 63 – Audit Time Log – Successful Time Entry

5.4.2 – Submit Audit

Once all line-items are complete and the audit Time Log has been completed it is now time to submit the audit.

1. Navigate to *Action* tab.
2. Line-Item Summary – all measures entered will appear on right side
3. Submit Audit

The screenshot shows the ViewPoint-Assessment software interface. The 'Action' tab is selected in the top navigation bar, indicated by a red box and a circled '1'. The 'Line Item Summary' table is displayed in the main content area, outlined with a red box. A red arrow points from a circled '2' to the 'Line Item Summary' table. At the bottom right, the 'Submit' button is highlighted with a red box and a circled '3'. The table contains the following data:

Floor ↑	Room	Ref	Fixture Hgt	Base Qty	Base Desc	Prop Qty
Floor 1	Storage Room	10552	12	1	Storage Natural Gas Water Heater, 40 gal, UEF = 0.64	1
Floor 1	Storage Room	10648	12	1	Storage Natural Gas Water Heater, 50 gal, UEF = 0.63	1
Floor 1	Storage Room	10649	12	1	Heat Pump Water Heater Electrician	1
				3		3

Figure 64 – Audit Time Log – Successful Time Entry

5.4.3 – 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. *Subcontractor Invoice ID*.
 - i. Auto populated when saving Trade Type
 - ii. This field is editable.
 - iii. Update the invoice number 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.

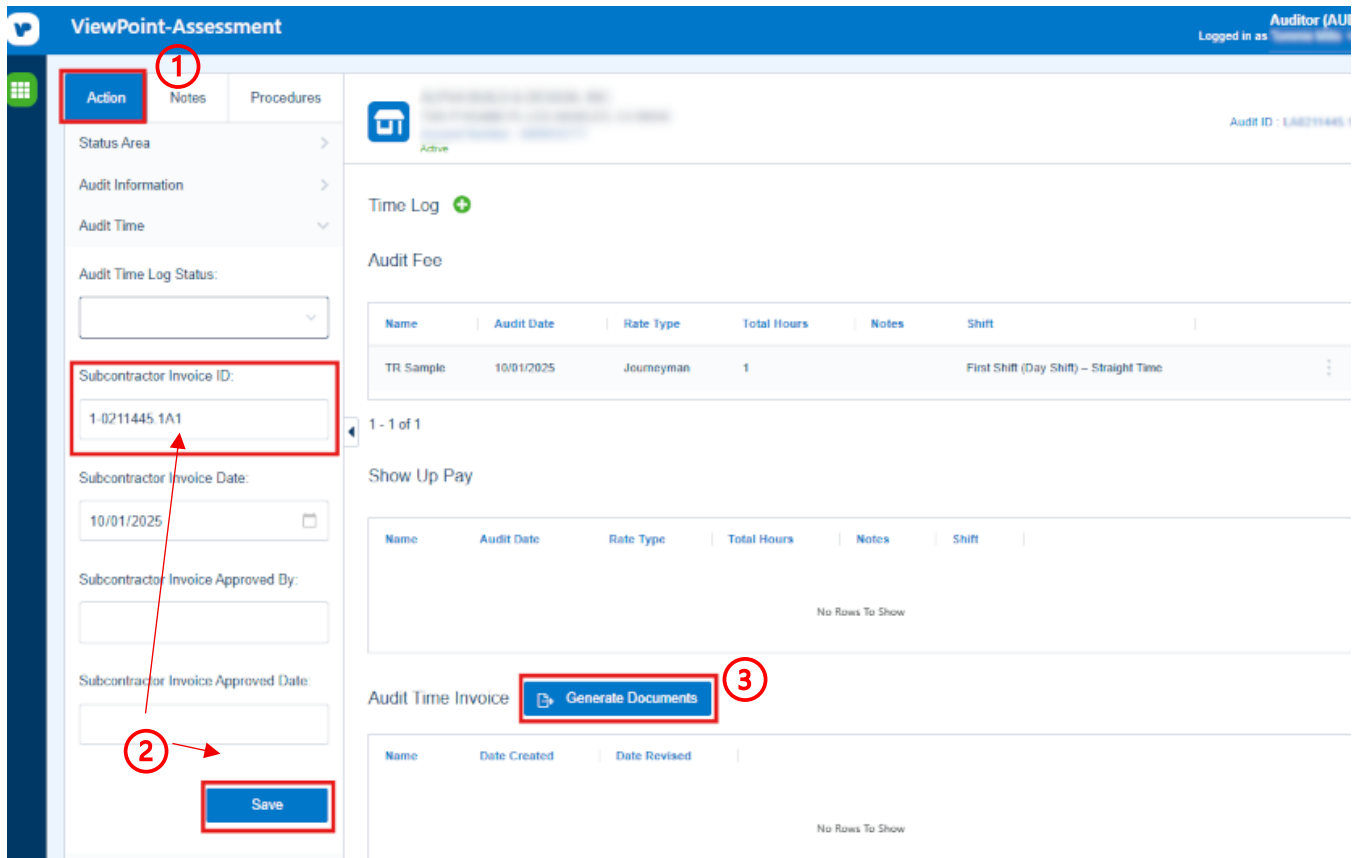
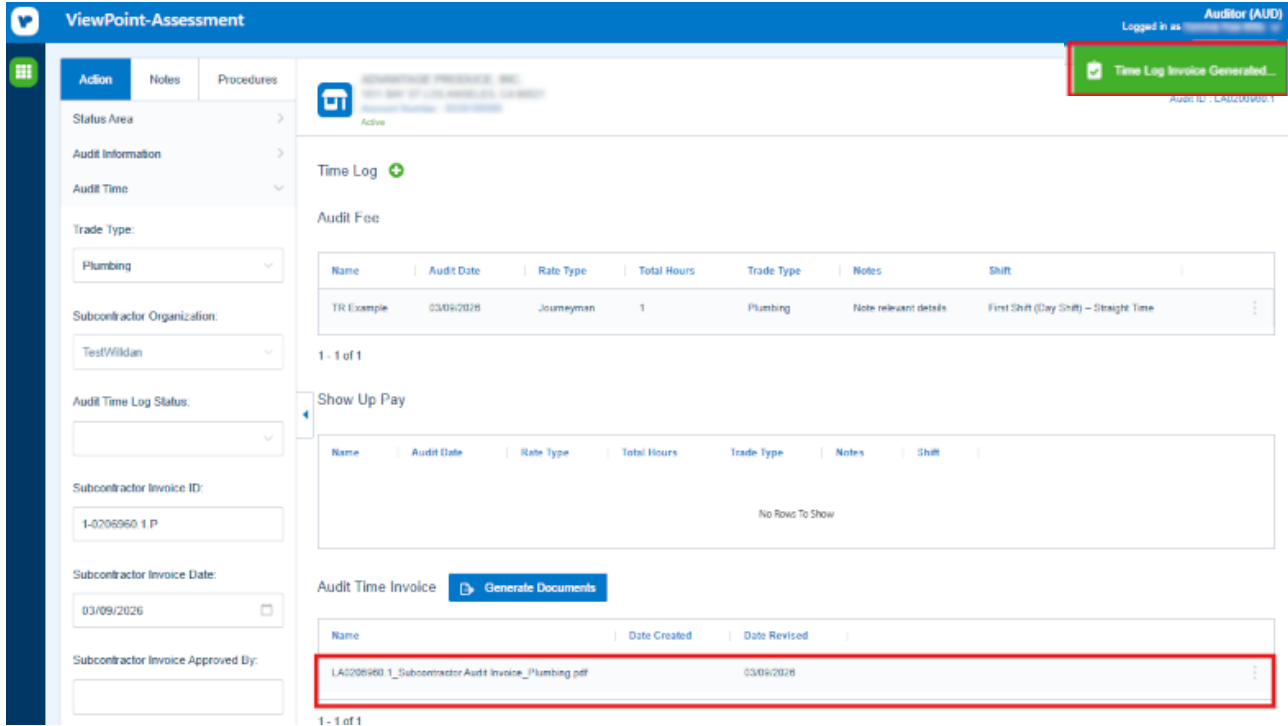


Figure 65 – Create Audit Invoice – Generate Invoice

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 software interface. On the left is a navigation sidebar with options like Action, Notes, and Procedures. The main area is titled 'Audit Time Invoice' and includes a 'Generate Documents' button. A green notification box in the top right corner states 'Time Log Invoice Generated...'. Below this, there are two tables: 'Time Log' and 'Audit Time Invoice'. The 'Audit Time Invoice' table contains one entry for a PDF document.

Name	Audit Date	Rate Type	Total Hours	Trade Type	Notes	Shift
TR Example	03/09/2026	Journeyman	1	Plumbing	Note relevant details	First Shift (Day Shift) – Straight Time

Name	Date Created	Date Revised
I:0206960_1_Subcontractor Audit Invoice_Plumbing.pdf	03/09/2026	

Figure 66 – Create Audit Invoice – Invoice Generated

5.4.3 – Submit Audit Invoice

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.

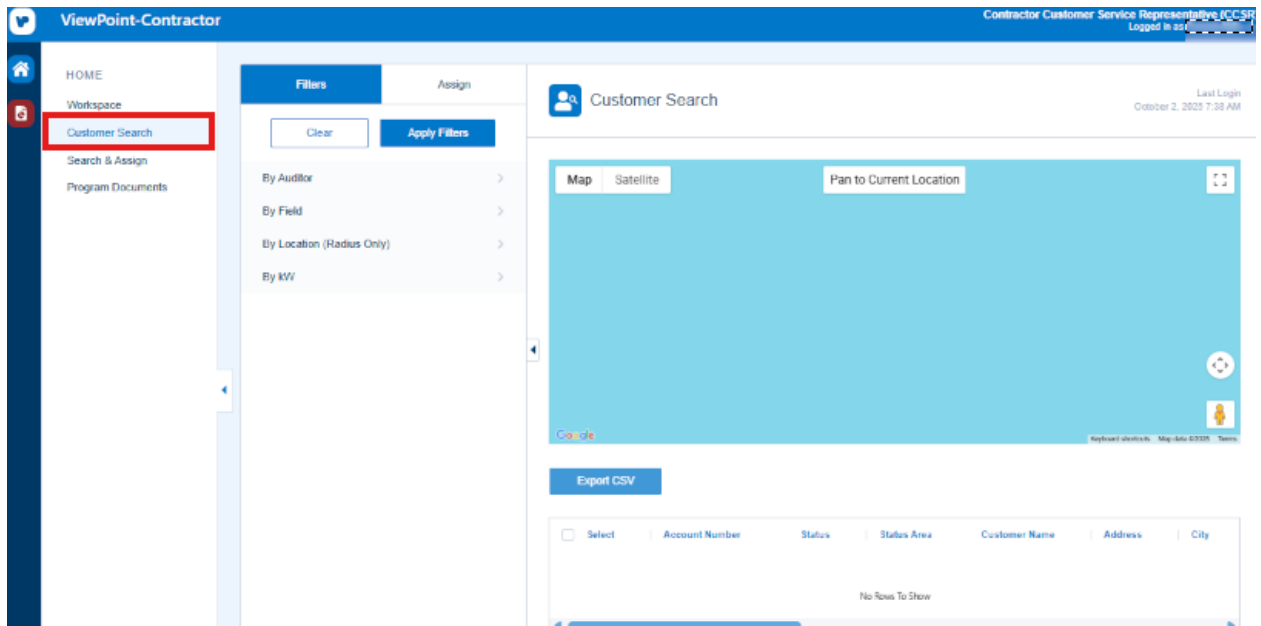


Figure 67 – Create Audit Invoice – Customer Search

2. Click to search By Field

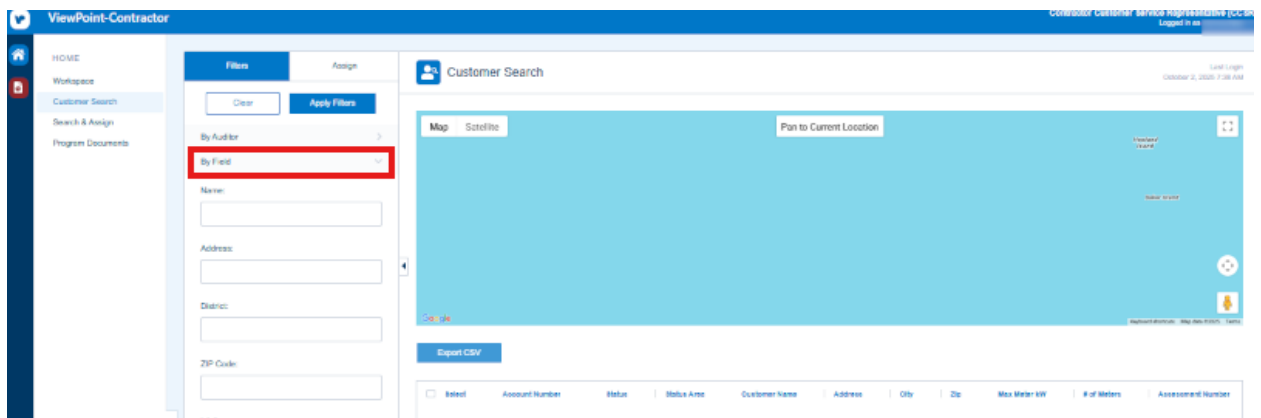


Figure 68 – Create Audit Invoice – By Field

3. Search by Audit Status: In-Progress

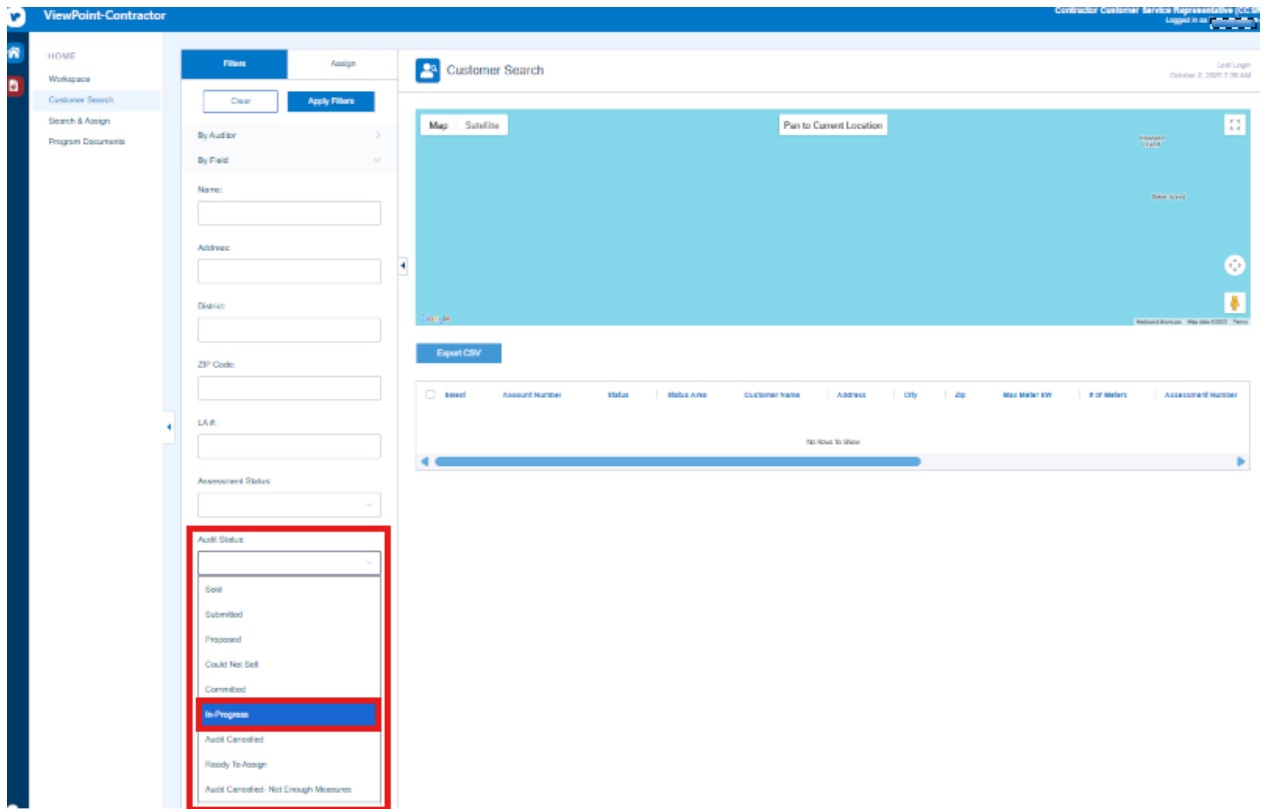


Figure 69 – Create Audit Invoice – Audit Status: In-Progress

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

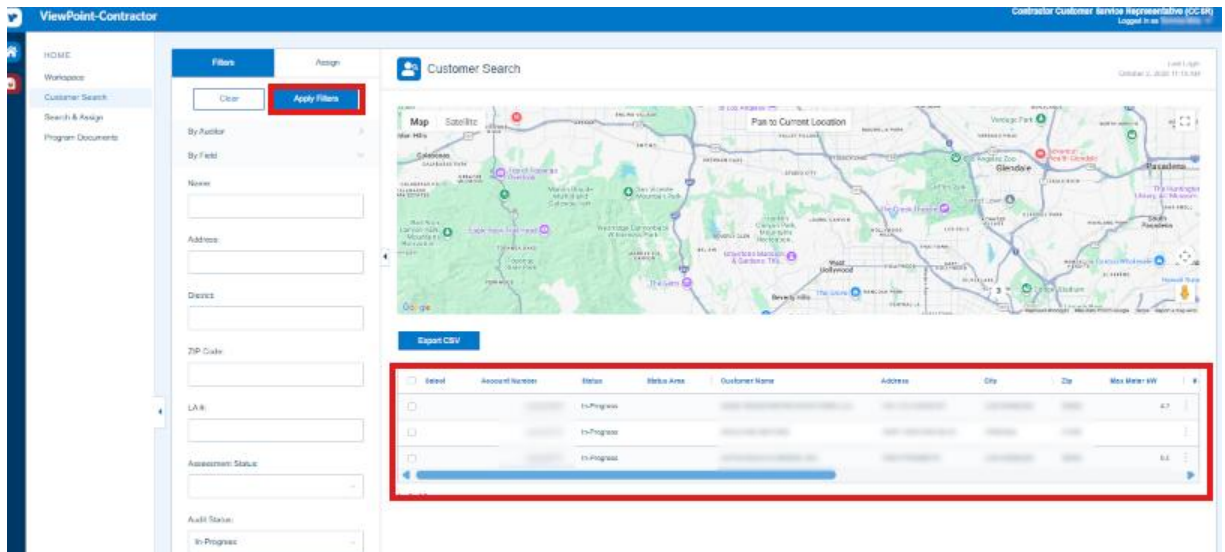
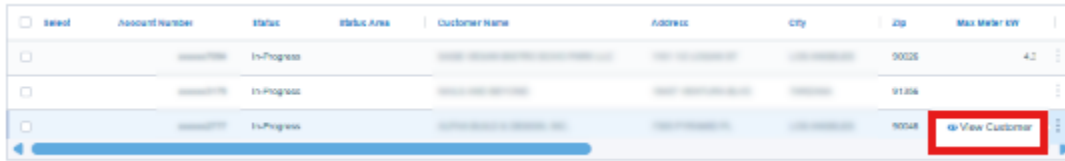


Figure 70 – Create Audit Invoice – Apply Filters & Filtering Results

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



Account Number	Status	Status Area	Customer Name	Address	City	Zip	Max Meter KW
Account 100	In-Progress	...	...	...	...	90025	4.2
Account 100	In-Progress	...	...	...	...	91804	...
Account 100	In-Progress	...	...	...	...	90048	...

Figure 71 – Create Audit Invoice – View Customer

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

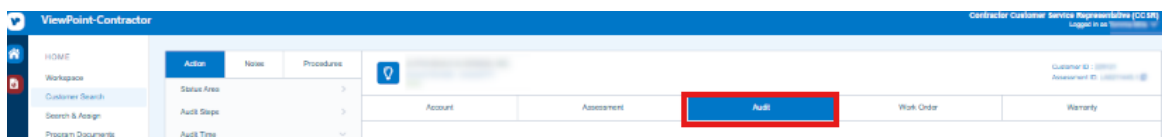


Figure 72 – Create Audit Invoice – Audit Tab

- 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.

Audit Time Invoice [Generate Documents](#)

Name	Date Created	Date Revised
LA0211445.1_Subcontractor Audit Invoice.pdf	10/01/2025	

1 - 1 of 1

[View](#)
[Versions](#)

Figure 73 – Submit Invoice & Audit – Opening Audit Invoice

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

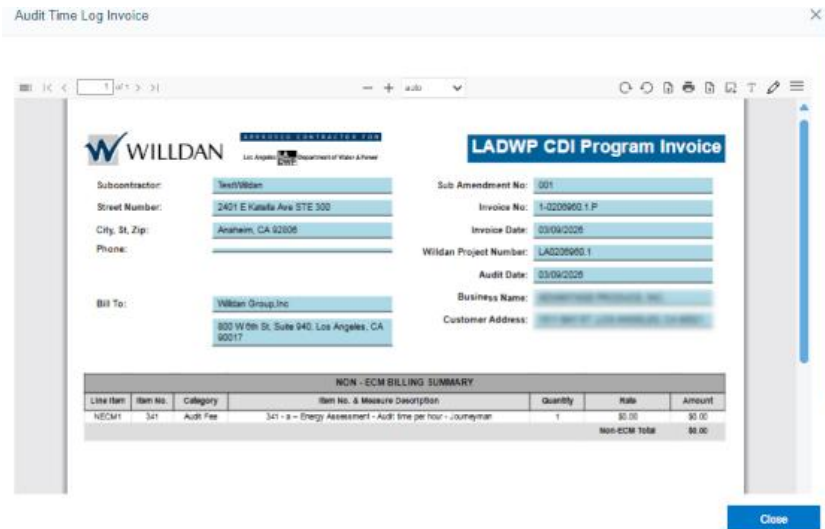


Figure 74 – Submit Invoice & Audit – Viewing/Downloading Invoice

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.

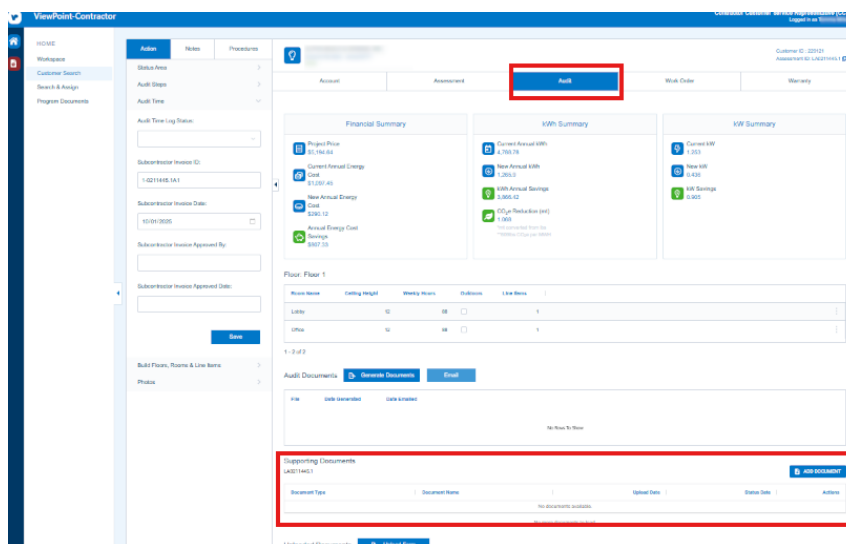


Figure 75 – Submit Invoice & Audit – Supporting Documents

12. Click Add Document

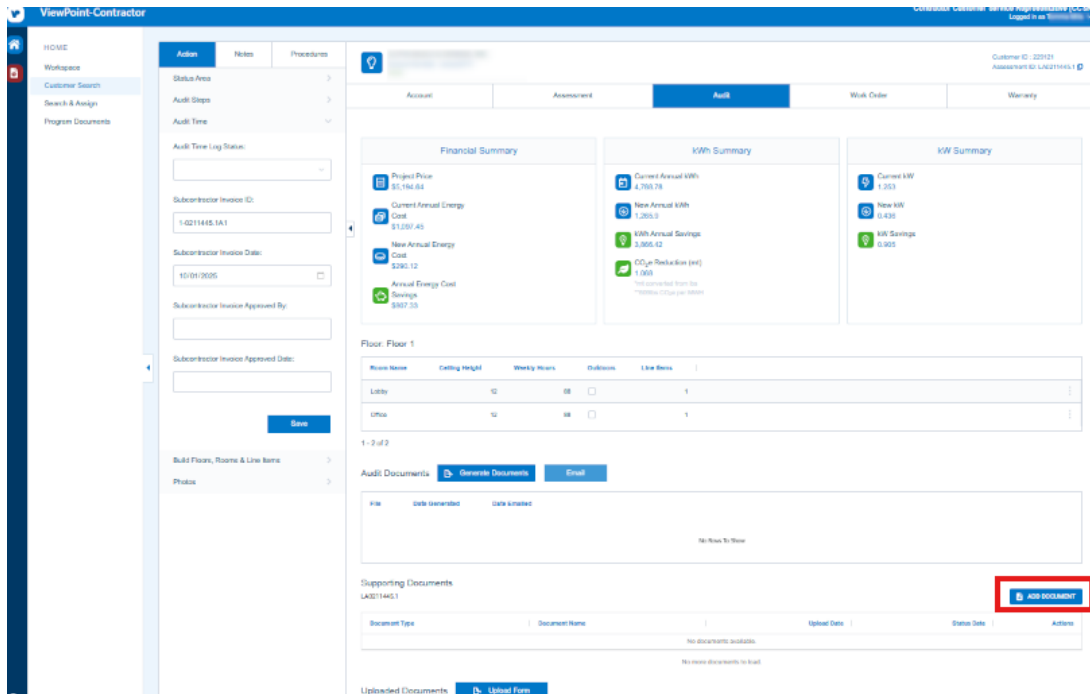


Figure 76 – Submit Invoice & Audit – Add Document

13. Select File Type

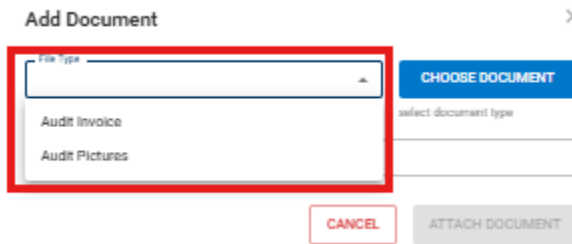


Figure 77 – Submit Invoice & Audit – File Type

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

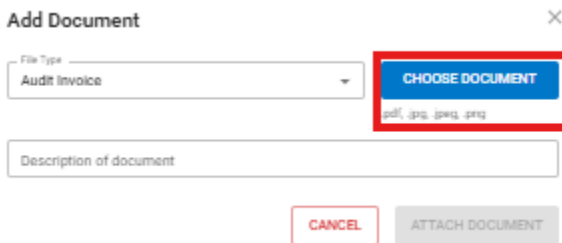


Figure 78 – Submit Invoice & Audit – Choose Document A

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

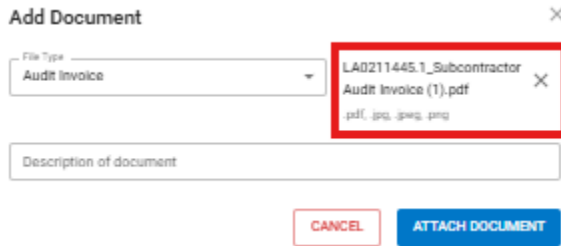


Figure 79 – Submit Invoice & Audit – Choose Document B

16. Click Attach Document

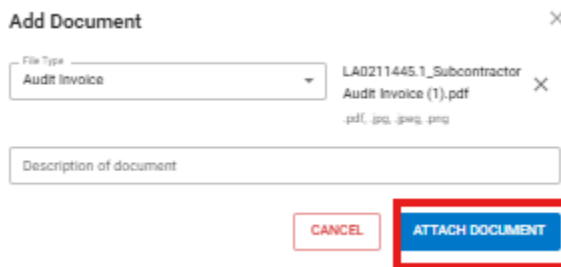
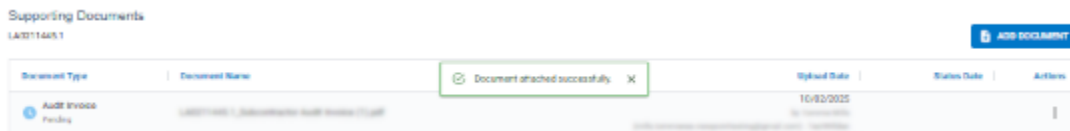


Figure 80 – Submit Invoice & Audit – Attach Document

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



Document Type	Document Name	Upload Date	Status Date	Actions
Audit Invoice Pending	LA0211445.1_Subcontractor Audit Invoice (1).pdf	10/02/2025		

Figure 81 – 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"*

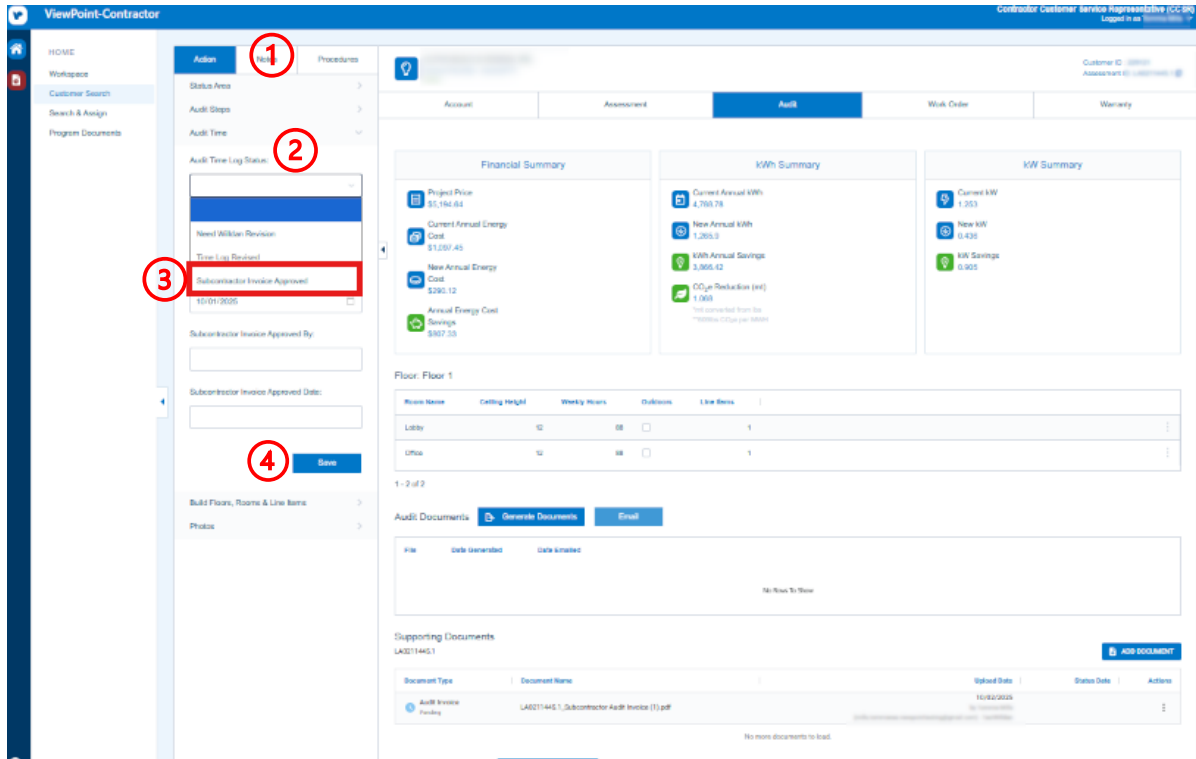


Figure 82 – Submit Invoice & Audit – Setting Audit Time Log Status

18. Click Submit.

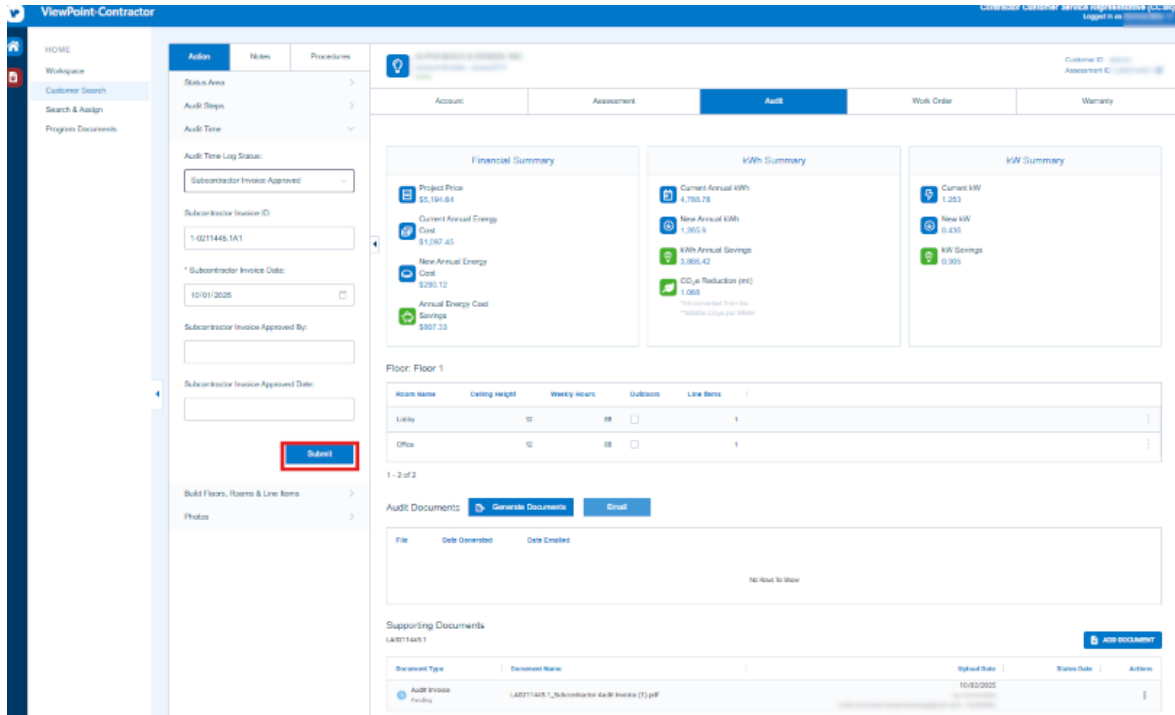


Figure 83 – Submit Invoice & Audit – Submit Audit

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”.

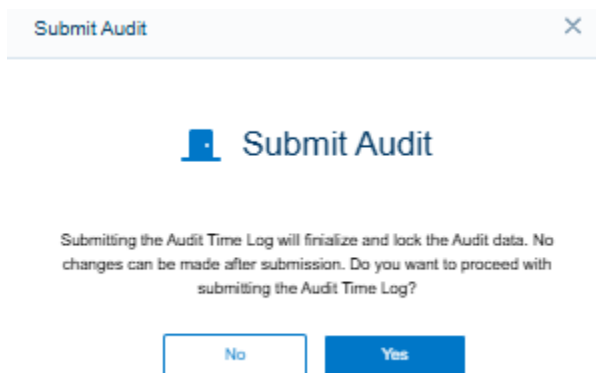


Figure 84 – Submit Invoice & Audit – Confirm Submit Audit

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.

The screenshot shows the ViewPoint-Contractor interface. On the left is a navigation menu with options like HOME, Workspace, Customer Search, Search & Assign, and Program Documents. The main area is divided into several sections:

- Left Panel (Audit Details):** Contains fields for 'Subcontractor Invoice Approved' (dropdown), 'Subcontractor Invoice ID' (text: 1 Q211448.1A1), 'Subcontractor Invoice Date' (calendar: 10/01/2025), and a red-bordered box containing 'Subcontractor Invoice Approved By' (text: Thomas Hill) and 'Subcontractor Invoice Approved Date' (text: 10/02/2025).
- Financial Summary:** Shows Project Price (\$1,184.64), Current Annual Energy Cost (\$1,267.45), New Annual Energy Cost (\$256.12), and Annual Energy Cost Savings (\$937.33).
- kWh Summary:** Shows Current Annual kWh (2,238.75), New Annual kWh (1,305.9), kWh Annual Savings (938.42), and CO₂e Reduction (mt) (1,928).
- Room Summary:** Shows Current kW (1.263), New kW (1.416), and kW Savings (1.905).
- Floor: Floor 1:** A table listing rooms: Lobby (Ceiling height: 12, Weekly hours: 88, Outdoor: 0, Line Items: 1) and Office (Ceiling height: 12, Weekly hours: 88, Outdoor: 0, Line Items: 1).
- Audit Documents:** A section with 'Generate Documents' and 'Email' buttons, currently showing 'No Rows to Show'.
- Supporting Documents:** A table with columns for Document Type, Document Name, Upload Date, Status, and Actions. It lists one document: 'AUDIT14481A1_1_Subcontractor Audit Invoice (1).pdf' uploaded on 10/02/2025.

Figure 85 – Submit Invoice & Audit – Submitted

6. 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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