

# Audit Template Quick Start Guide

## For Program Administrators



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## **Overview**

This guide provides program administrators with step-by-step instructions for using Audit Template, from registration to managing submissions. It covers using **Custom Template Creator (CTC)** to define a new reporting template, process for testing the template, managing submissions using the Program Admin Dashboard and available support resources to streamline the audit process.

### What is Audit Template?

Audit Template is a **web-based tool** that may be used to collect, store and report building energy and water audit data. The tool provides **custom reporting templates** for programs or jurisdictions utilizing Audit Template for collecting audit data.

A user can select the template based on the program that they are reporting data for and after entering building audit data into the tool, users may generate an audit report which lists all the data entered along with calculated tables and charts and submit the building report to the program or jurisdiction. The audit data is available to download in PDF, Microsoft Excel, CSV, and BuildingSync XML\* file formats by the user.

#### Note:

The data entry input fields available in the Audit Template and the audit data report follow the ANSI/ASHRAE/ACCA Standard 211-2018 (RA 2023), Standard for Commercial Building Energy Audits. Additional data fields required by specific programs or jurisdictions are included where applicable. The icons below identify input categories on the data entry screens in the tool:

- SHRAE Level 1 or 2 audit inputs
- Program or jurisdiction specific inputs.

 $\star$  Fields required for program or jurisdiction reporting.

Users may gather data pertaining to an ANSI/ASHRAE/ACCA Standard 211 (RA 2023), Standard for Commercial Building Energy Audit separately prior to using the tool or may enter data directly into the tool.

<sup>\*</sup> The XML files follow the format of BuildingSync® XML developed by National Renewable Energy Laboratory. BuildingSync® is a standardized language for commercial building energy audit data that software developers may use to exchange data between audit tools. For information on BuildingSync, visit https://buildingsync.net.

# **Getting Started**

## Initial Setup: Registering to Use the Tool

To get started, register a user account on the Audit Template website <u>and notify the Audit</u> <u>Template team at audit.template@pnnl.gov. The Audit Template team will create a 'Program'</u> <u>instance and assign your user account as the program admin for the same.</u>

- To create an account, visit <u>https://buildingenergyscore.energy.gov</u>.
- Click the "**Register**" button (Figure 1) and fill in the required information, including your email address, which will be used for verification purposes.
- A confirmation email will be sent to your inbox. Click the link in the email to verify your email address and log in using your credentials, once verified.

Once you are assigned as the program admin, the Program Name will appear under the "**CITIES**" menu in the main menu bar in your account.

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BUILDING EN	NERGY Score/Audit Template						Release 2025.0.0.709	rgy Efficiency & newable Energy
🔒 BUIL	DING - CITIES - MANACE - HELP -						🖡 🗿 🛹 Help	Desk 💄 -
Asse	t icore Fort / dit Template					8		
	rovides a full listing of audit reports accessible from your account, allowin lew NYC Properties.	ng you to add/delete/modify reports in bulk or ind	ividually. Use	e the filter options to th	e right to refine your		Add Audit Report	-
	entries filter by Name and Owner: asset					U.S. DEPARTMENT OF ENERGY	Import Buildings	
Building 🔒	Name Q	Report Type	Status	Last Modified	Owner Q	<sup>♦</sup> Options □	Example Building Library	
26	Example RP Building	Demo City Report	Editing	2025-02-17 12:39 PST	Asset Score PNNL <asset.score@pnnl.gov></asset.score@pnnl.gov>	• •		
27	Example Audit Report Building	Demo City Report	Editing	2024-09-23 15:09 PDT	Asset Score PNNL <asset.score@pnnl.gov></asset.score@pnnl.gov>	•	Filter buildings by:	0

Figure 1: Program appearing under "CITIES" menu in Audit Template



Select the **Program Name**, then click **"Manage Reports"** in the right-hand menu to view all existing report templates for that program. The Audit Template team may have already created a report template as a starting point. If no template is available or a new one is preferred over editing an existing one, Step 1 should be followed; otherwise proceed to Step 2.

### **STEP 1**

**Reporting Template Setup** Create and Define a New Report This step allows a program administrator to select the group of inputs which could then be further customized through Step 2. The available group of inputs, categorized as a 'Base Template' and the additional modules are documented in the <u>CTC Detailed User Guide</u>.

- a. Click the "New Report" button.
- b. Select a "Base Report" (such as ASHRAE Level 2 Report) and enable any additional modules, such as Water Audit, Retrocommissioning Strategic Retrofit Plan as needed.

c. Click 'Next' to view and customize the inputs for the base template and each selected module, as described in Step 2.



Figure 2: New Report Template Screen

## STEP 2

**Field Configuration** Customize fields This step allows a program administrator to customize field selection, define how they behave, and adjust field labels to better reflect program requirements.

- a. If continuing from Step 1, click 'Next'. If editing a report previously created, select the report template name, then click "Edit Report". Collapsible tabs for different sections will appear on the screen (Figure 3).
- b. Expand each category and select the **relevant checkboxes** to include or exclude specific fields in the report template.
- c. This interface also allows a program administrator to rename fields using the '**Custom Title**' input box.

Adding additional inputs or adding help text for inputs is not currently supported through this interface. The program administrator should contact Audit Template team for such customization requests.

For detailed guidance on categories and fields, refer to the CTC Detailed User Guide.

Once you have customized the template, select "**Create Report**" for new audit report template and "**Update Report**" to save the changes. <u>Please inform the Audit Template team</u>, who will provide a final review before publishing the reporting template. Once published, the template would be available for auditors to use.

Building Information					11 of 18 visible
Contact Information and Audit Details					26 of 41 visible
Facility Description					136 of 490 visible
Utility Data and Benchmarking					78 of 114 visible
Energy Use Breakdown and QA/QC					29 of 29 visible
Energy Savings Opportunities					14 of 58 visible
Building Energy Savings Opportunities					14 of 58 visible
Field*	Visible?*	Required?*	N/A?*	Custom Title	Group*
Rebates available? Type: Boolean				Rebates available?	Optional Group 🔸
Measure Identifier Type: UnicodeVarchar	✓	✓		Measure Identifier	ASHRAE Group
Equipment ID				Equipment ID	Optional Group 🛛 💙

Figure 3: Custom Template Creator (CTC)



After creating and customizing the Report Template, you may want to test it out and preview the auditor workflow. To do so, create an example building using one of the following methods.

- a. From the initial screen with all reports listed under your city, select "**Options**" and then "**New Building**" to create a new building for a specific report (Figure 4), or
- b. Select the specific report template and click "**New Building**" to create a new building (Figure 4).

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	<u></u>					
+ Back DE	emo City, WA Reports				0	New Report
Show 50 🗸 en	trica					
Search: Report ID	* Report Name Q	Reporting?	Buildings	Submissions	Options	
4	Demo City Report	Yes	161	9	¢ I	
68	Demo Retrocommisioning Report	No	0	0	New Building	
74	Custom Template Creator (CTC) Demo	No	1	0	Edit Report	
76	Demo ASHRAE Level 2 Report	Yes	10	0		
77	Demo ASHRAE Level 1 Report	Yes	2	0	¢ •	
Report ID	Report Name Q	Reporting?	Buildings	Submissions	Options	
BUILDING ENE	<sup>RGY</sup> core/Audit Template		Report wa	as created successfully.		×
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	Demo City, WA Demo Report Template				9	
+ Back	Demo City, VVA Demo Report Template					New Building
O Note: Cli	ck the "New Building" button to start a new audit report for a building. Click the	'Edit Report" button to edit this audit report temp	plate.			Edit Report
Derest.	Information				0	
🖂 Contact	s and Certification				0	
🔳 Data Co	ollection				0	

Figure 4: New Building using Options menu (Top), New Building using the "New Building" button (Bottom)

A modal window will appear prompting you to enter basic building information. Select "**Create Building**", to view the fields as configured in the previous section. Navigate through different screens using the icons displayed at the top. For more details on the auditor workflow, refer to the AT Auditor Quick Start Guide.

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New Demo	City Report			0		MANAGE + HELP +				A Help Desk 1
					Demo City	0 🔒 🕵	4 🛎 🔋 ले	≓ Get an	Asset Score	idation Errors
	☑ Building Name ★ ☑ Year Completed ★	1					he form. Items marked with a IS corresp dicates that an input is required for city		oed with a 🚔	
		Year in which constru	iction was com	pleted.		Click the "Save" button for ea	ach section to save your data. You may	/ lose information if you leave these reporting p	ages without saving.	
	🕑 Gross Floor Area ★			ft <sup>2</sup>		Building Informa	ition		8	
C Location *						Building Information			0	
Street							🕫 Building Name ★	Demo City		
							S Year Completed *	1998 Year in which construction was completed.		
City		Please select	~	ZIP Cor			😂 Gross Floor Area 🖈	45000.0	ft <sup>2</sup>	
C Notes						E Location *				
						3230 Innovation Blvd				
						Richland		Washington 👻	99354	
							Unique Building ID (UBID)	🖉 What is UBID?	🕼 Assign UBID	
				1		G Notes				
		Cance	Create	Building					// Sove	

Figure 5: General Building Information Modal Window (Left), Auditor Interface for the report (Right)

# A Managing Submissions: Program Admin Dashboard

All submissions can be accessed and managed through the Program Admin Dashboard. Program Admin Dashboard can be accessed by clicking on the Program Name from the "CITIES" menu at the top.

The Program Admin Dashboard allows program administrators to:

- Review all submissions.
- Update submission status using the **Options** dropdown (e.g., "**In Review**," "**Received**," "**Rejected**," or "**Compliant**").
- Download project data as a PDF report, Microsoft Excel file, CSV file, or BuildingSync XML.

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Submission 🔺 D	Building 0	Tax Identifier () Q	Building Name Q	Address () Q	0 Submitted	Submitter Q	Comment Q	<ul> <li>Report Type</li> </ul>	Includes RCx measures?	Is shared with RCx Agent?	¢ Status	Options	Report Type:	ons by:	
2367	9698		Example Audit Report Building for Webinar	123 Street	2020-04-29 21:00 PDT	Asset Score PNNL <asset score@pnnl.gov=""></asset>		Demo City Report	No	No	Received	Mark as In Review	- All -		Ÿ
3015	27		Example Audit Report Building	123 Street	2020-12-01 11:18 PST	Asset Score PNNL <asset.score@pnnl.gov></asset.score@pnnl.gov>		Demo City Report	No	No	Complies	Mark as Rejected Mark as Compliant	- All -		~
	11160		Example Audit Report Building - demo	123 Street	2024-02-26 22:01 PST	Asset Score PNNL <asset.score@pnnl.gov></asset.score@pnnl.gov>		Demo City Report	No			View Submission History Download CSV	3 art Date:	End Date:	
Submission ID		Tax Identifier Q	Building Name Q	Address Q	Submitted	Submitter Q	Comment Q	Report Type	Includes RCx measures?	Is shared with RCx Agent?	Status	Download PDF Download XML	ite Type: - All -		v
howing 1 to 3 of	3 entries (filte	red from 10 to	stal entries)												

Figure 6: Jurisdiction Dashboard

https://buildingenergyscore.energy.gov/

# **Help Resources**

If you need assistance while using Audit Template, several resources are available to guide you:

### a) Interactive Help Icons

Throughout the interface, you'll fine "?" icons. Click them to go to relevant sections of the online Audit Template User Guide, that provides detailed instructions for the specific feature or content you're viewing.

#### b) Help Desk Search

Click the "Help Desk" button in the top menu to open the support window. Use the "Got questions?" search bar to quickly find articles, guides, and resources. You can also visit – <u>Audit Template User Guide</u> to access the detailed user guide.

### c) Contact Support

For project-specific support, click "**Contact us**" to submit a support request. This creates a ticket for the PNNL Help Desk, who will review your issue and respond directly.



Figure 7: Help Desk and Contact Us