



AuditPlanner™
Quick Start Guide

AMERESCO  ASSET SUSTAINABILITY
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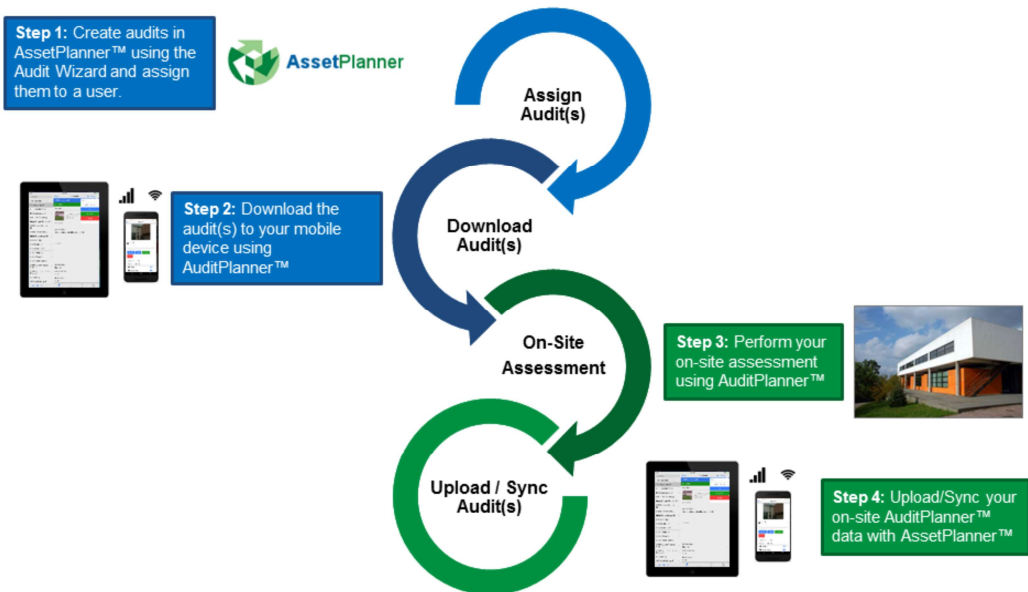
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Introduction:

Process Steps, Installation & Login

Process Steps



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Describe the general flow of the App and how it interacts with the Web software.

Note that for **Step 1** Audits are normally assigned to the Auditors by Ameresco or the Client.

Best practice is to follow these steps:

Download

Perform assessment on mobile device

Upload completed assessment

Finalize Audit in web interface

Make a note that they don't want to be doing too much back and forth – the App will warn you if your data is out of sync but if they follow the best practice above they will have no issues.

Installation & Login

While AuditPlanner is designed to work offline while performing site assessments it is important to note that a wireless or mobile data connection is required for the initial login and download of audits.

To install AuditPlanner follow the steps below for your device of choice:

Android: Go to the Google Play Store and search for AuditPlanner then tap Install

Apple: Go to the App Store and search for AuditPlanner then tap Install

Once the App has been installed onto your device open the App and enter your email and password.

Tip: If you have an AssetPlanner account it will be the same email & password you use for the web interface.

The screenshot shows the 'Login' screen of the AuditPlanner app. It features a white background with a light gray header. The form contains the following elements: an 'Email' input field, a 'Password' input field, a 'Server' dropdown menu with 'assetplanner.com' selected, a blue 'Login' button, and a 'Forgot your password?' section with a 'Reset Password' button. Three callout boxes provide instructions: a blue box points to the email and password fields, another blue box points to the 'Reset Password' button, and a green box points to the 'Login' button.

Tap into the fields to enter your username & password.

If you have forgotten your password tap on the Reset Password button.

>> Tap on "Login" to begin our next section.

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Note that they will need to have their device connected to the internet for these next three slides.

If they forgot their password they will need to reset it, remind them that it is the same account for AssetPlanner.

Downloading Audits

Once you have successfully logged into AuditPlanner the next step is to retrieve the list of Audits assigned to your account and download them to your device.

Step 1: Tap on **Download Audits** to retrieve a list of Audits that have been assigned to your account.

You can **search** for an audit by name or ID. The **filters** button will allow you to narrow down the listing.

Step 2: Select an audit for download by tapping on the audit name. A checkmark will appear indicating your selection(s).

>> Step 3: Tap on **"Download"** to begin our next section.

Download 4 Audit(s)

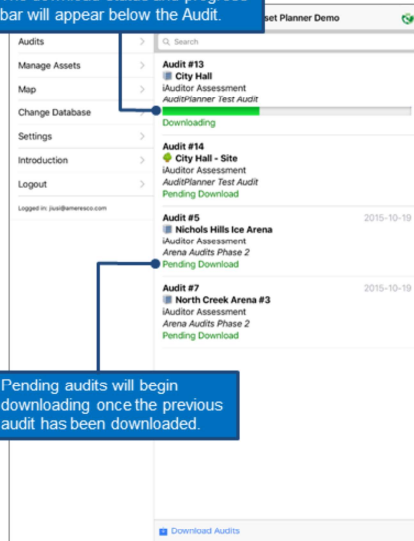
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Recommend that they download in small batches to ensure that the files are downloaded correctly and their wireless signal or device doesn't drop the connection.

Downloading Audits

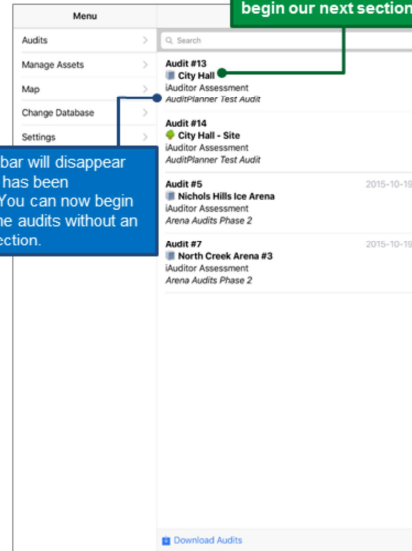
Once an Audit has been downloaded you can begin working without a wireless or mobile data connection.

The download status and progress bar will appear below the Audit.



Pending audits will begin downloading once the previous audit has been downloaded.

>> Tap on an Audit to begin our next section.



The progress bar will disappear once an audit has been downloaded. You can now begin to work with the audits without an internet connection.

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Note that the audits will download one at a time with the others shown as 'pending'

Program Overview

AuditPlanner is a mobile application that enables field assessors to perform audits of Assets (facilities, vehicles, linear etc.) to supplement, review and confirm the data stored in AssetPlanner. AuditPlanner is the most efficient way to collect assessment data and seamlessly upload to AssetPlanner.

Below is a summary of the main pages within AuditPlanner:

Audits

- Audits are the starting point for all field assessments
- The main audit page is where you will find basic information about the Facility (year constructed, size, number of floors, etc.) and links to all related audit items (elements, actions & pictures)

Elements

- Elements are inventory items that make up an Asset (windows, doors, flooring, etc.)
- On the Element page you will find a listing of all inventory items including their basic details, condition and linked pictures

Actions

- Actions are work that needs to be performed on an element (Replacement, Repair, Install and Study)
- Actions are the most important piece of Capital Planning as they indicate the year and cost of replacement for each inventory item

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Briefly go over the main pages & concepts – not necessary to read through each when presenting this is more for the PDF handout purposes.

Audit Details:

Viewing & Updating General Audit
Information

Audit Details

The Audit page is your key to navigating to the different pages of the software. It contains the cover photo and buttons that will allow you to view Audit Details, Elements, Actions and Photos. The Audit page is also where you will upload or sync your data with AssetPlanner. Back buttons at the top of each page will take you back to the previous section.

The picture on the main page of the Audit will serve as the cover page for all reports. Tap on the picture box to add or replace the cover photo.

>> To begin our next section tap **Back** and then tap on the **Elements** button.

Tap on **Audit Details** to view additional information about the audit >>

A summary of all related audit items are displayed below. You can scroll down to view more.

The Audit Details contain additional information about the Asset. **Scroll down** to view additional fields and tap into a cell to begin editing. **Changes are saved as soon as you tap out of a cell.**

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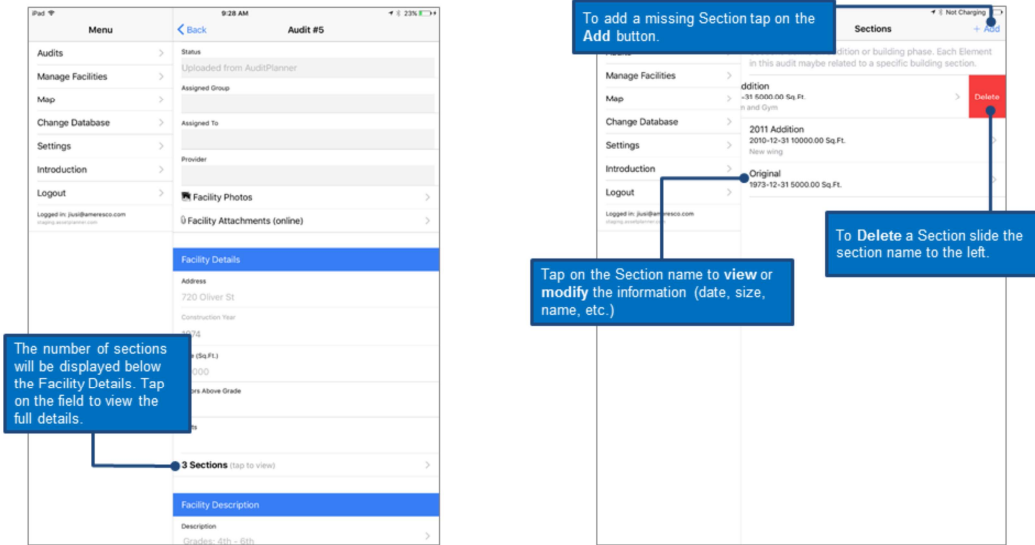
Describe this page as the “report cover page” and summary for their assessment.

Explain that this is the central location for viewing your audit information, buttons will take you to the different parts that make up your audit.

Note that using the Back button they can go back to switch to another audit they have downloaded or to download more audits.

Section Details

The Audit page will also contain a link to display any available Sections (additions, wings, etc.) within the building. Review the Section details and Add/Modify/Delete before performing your assessment. This will allow you to select the appropriate Section when updating the Element inventory.



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Describe this page as the “report cover page” and summary for their assessment.

Explain that this is the central location for viewing your audit information, buttons will take you to the different parts that make up your audit.

Note that using the Back button they can go back to switch to another audit they have downloaded or to download more audits.

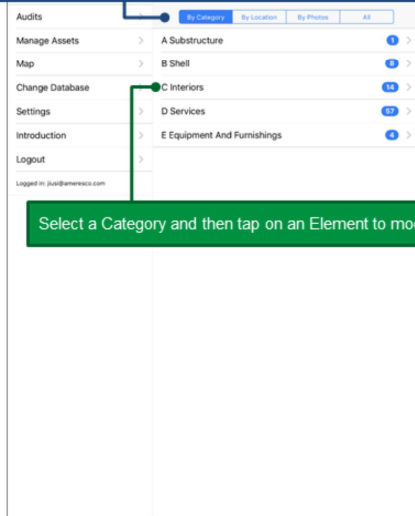
Elements & Actions:

Updating the element inventory and scheduling actions.

Elements

When you tap on the Elements button it will take you to the list of inventory items organized by their uniformat category.

The Element Listing can be organized based on the Category (overall discipline), Location (utilizes the location field), Photos or by All which will show the full listing.

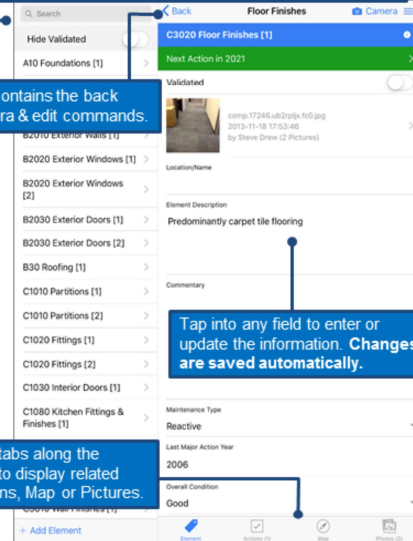


The Element Page will display a list of elements to the left (tablet view only) and details about the element to the right.

The top bar contains the back button, camera & edit commands.

Tap into any field to enter or update the information. Changes are saved automatically.

Tap on the tabs along the bottom bar to display related items: Actions, Map or Pictures.



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Explain the category structure is based on the uniformat category codes and if they need more information they can click on the 'i' icon next to the element name in blue for a definition (if available).

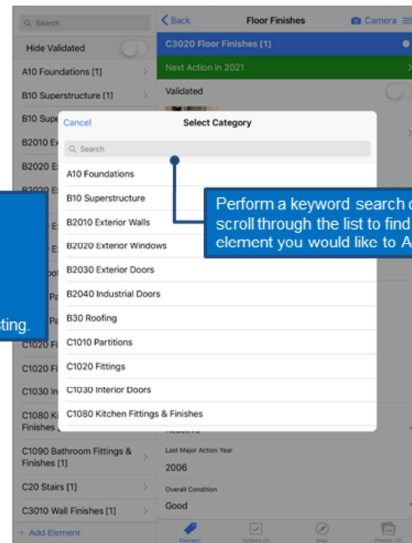
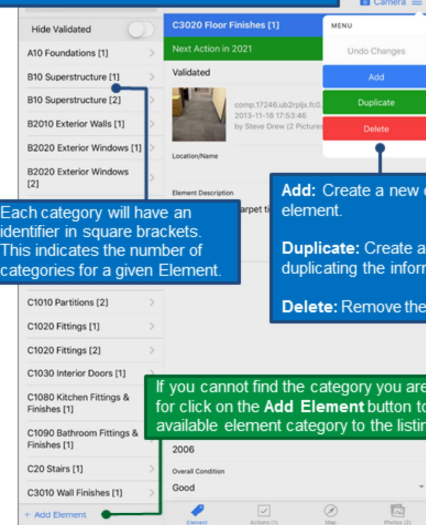
Explain that at the inventory level they will be performing two basic steps:

1. Confirming & Reviewing inventory details (quantity, size, make, model)
2. Validating the Condition of each item (good, fair, poor, critical)

Elements Add & Delete

A key aspect of performing your on-site assessment is to review the Element list and Add or Delete items based on the Asset's observed inventory.

Tap on the icon '≡' next to the camera button to view the available edit commands.



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Notes:

The element listing and available categories are generated based on the template assigned to each Asset

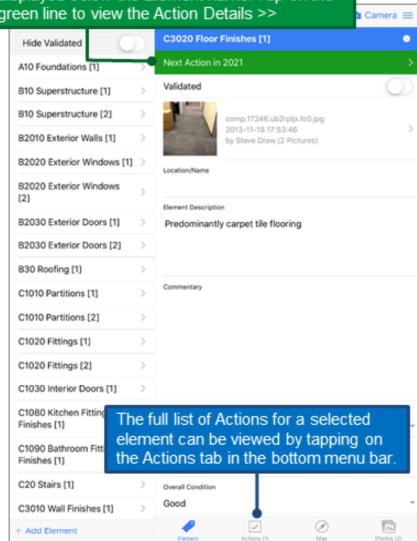
Elements should be added to reflect: Differing Condition, Type, or Age

Delete all elements that do not exist in the facility

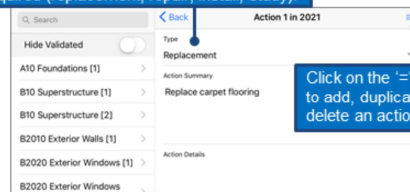
Elements & Actions

In addition to the basic inventory information most Element categories will have a related Action for replacement of the inventory item at the end of its projected useful life.

The most current scheduled Action will be displayed below the Element name. Tap on the green line to view the Action Details >>



The Action type specifies the type of work that is required (replacement, repair, install, study).



The three most important Action fields are the **Cost**, **Year** and **Repeat Interval** (lifecycle or frequency of replacement). These fields tell the software how much and when to forecast replacement.



Each action will have a series of Priority Questions. Answer each question where applicable to increase the priority of an action based on the observed conditions.

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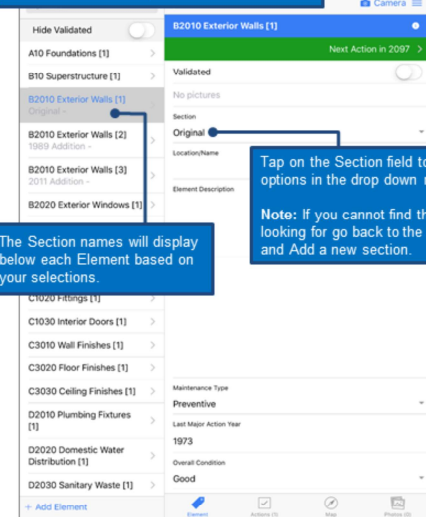
Notes:

Emphasize the importance of actions for capital planning **YEAR & COST** are mandatory!
Prioritization is also VERY important.

Elements & Sections

Part of building the Element inventory is to identify the appropriate Section that an Element belongs to and to Add additional Elements to reflect the unique differences within each section (type, materials, condition, age, etc.)

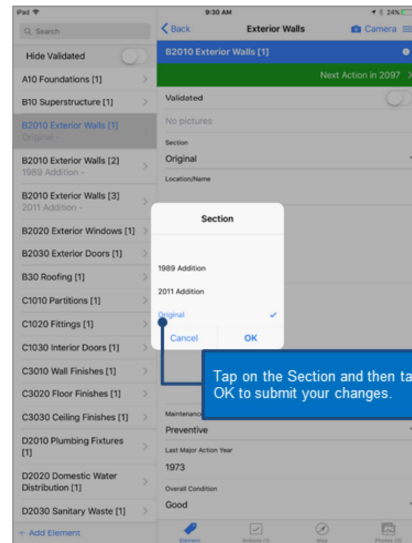
Remember to use the Add button to insert Elements that are unique to each Section.



The Section names will display below each Element based on your selections.

Tap on the Section field to view the available options in the drop down menu.

Note: If you cannot find the section you are looking for go back to the Audit Details page and Add a new section.



Tap on the Section and then tap OK to submit your changes.

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Notes:

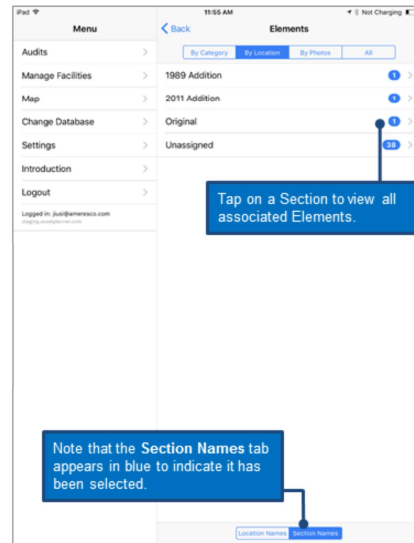
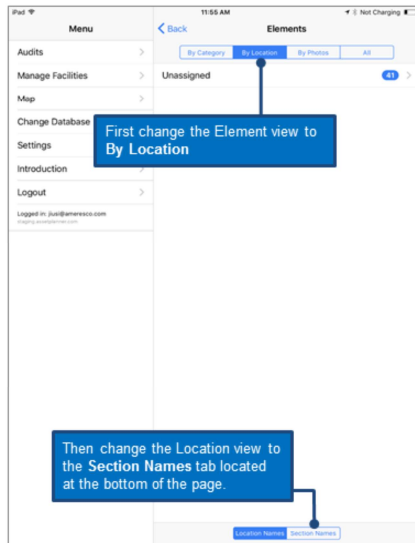
The element listing and available categories are generated based on the template assigned to each Asset

Elements should be added to reflect: Differing Condition, Type, or Age

Delete all elements that do not exist in the facility

Viewing Elements by Section

Once you have assigned Elements to their appropriate Section you can view the Element listing by Section. Go to the main Elements page (back if on the Element list or tap on Elements if on the Audit Details) and select Location and by Section Names.



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Notes:

The element listing and available categories are generated based on the template assigned to each Asset

Elements should be added to reflect: Differing Condition, Type, or Age

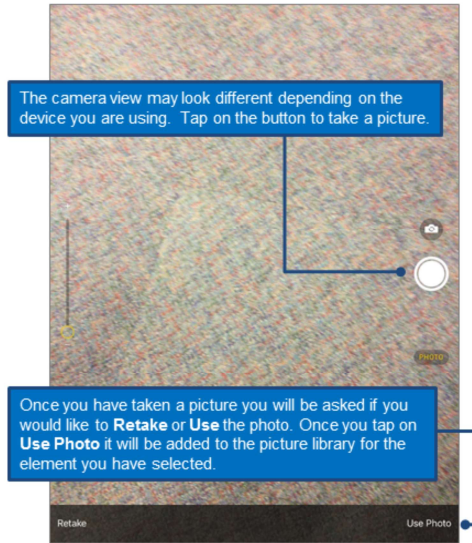
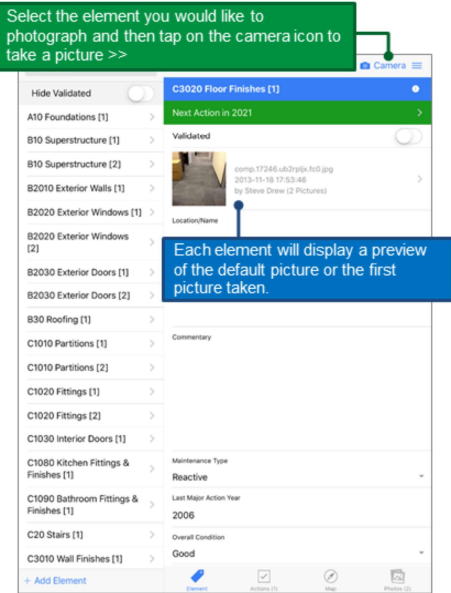
Delete all elements that do not exist in the facility

Pictures:

Taking & Viewing Pictures

Taking Pictures

AuditPlanner allows you to take pictures of each inventory item by first selecting the item and then tapping on the Camera button. Pictures can also be taken at the Audit level (cover photos) by following the same process described within the next two slides.



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Notes:

By Default AuditPlanner does not save copies of the photos to your device library, if you would like this feature you can enable it under the app settings.

Viewing Pictures

Pictures can be viewed and managed by tapping on the thumbnail or by selecting the photo button on the bottom menu bar. You can also view all Audit pictures by clicking on the element picture link on the main Audit page.

Tap on the Library button to add a picture from your device photo library or tap on the camera to take a new picture.

Tap on a thumbnail in the list to view a pop-up preview & picture manager.

To view a pop-up picture viewer tap on the thumbnail

Add comments or annotations to your pictures.

Swipe to navigate to the next picture.

To view and manage your pictures in a full screen list view tap on the "Photos" icon in the bottom bar >>

Picture management tools:
Set as Default: This will set the picture as the default that will appear on main audit or element page.
Move: This will move the picture to another element
Copy: This will move a copy of the picture to another element
Delete: Tap the trash can icon to delete the picture.

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Notes:

- Auditors should take a minimum of 2 photos:
- Picture of Overall Element
- Close Up Picture of Deficiency (or equipment tag)

Upload/Sync & Audit Status: Synchronizing your Audit with AssetPlanner

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Upload & Synchronizing Data

Upload & Synchronizing Data requires a wireless or mobile data connection.

Once an audit has been completed in AuditPlanner it is time to upload the data to AssetPlanner.

On the Audit page tap on Upload/Sync to submit your Audit data to AssetPlanner >>

Click "Yes" if this is a final upload. A final upload indicates that you are finished working on the audit within the mobile tool.

If the upload is not final and you simply want to synchronize your mobile data with the web interface click "No"

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Notes:

Skip to the next slide to talk more about the "Final" upload question & audit status fields.

Audit Status

There are a number of status fields to help Assessors and Managers review the audit listing and keep track of many audits. The below fields will update automatically as AuditPlanner and AssetPlanner interact:

Scheduled: the audit has been assigned in AssetPlanner and is ready for download.

Downloaded to AuditPlanner: the audit has been downloaded to AuditPlanner.

Note: this status also applies to synced data that was not identified as a 'Final' upload.

Updated from AuditPlanner: the audit has been uploaded to AssetPlanner and was marked as a final upload from AuditPlanner.

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Notes:

If you identify your upload as 'final' you can make further modifications in the web interface (AssetPlanner) but will need to re-download/sync the data if you want to make further changes on AuditPlanner.

The "Final Upload" function is a way of indicating that their job is complete on the mobile tool. It can either mean they are completely finished with the audit OR they are finished on the app and are now going to finalize in the web audit tool within AssetPlanner.

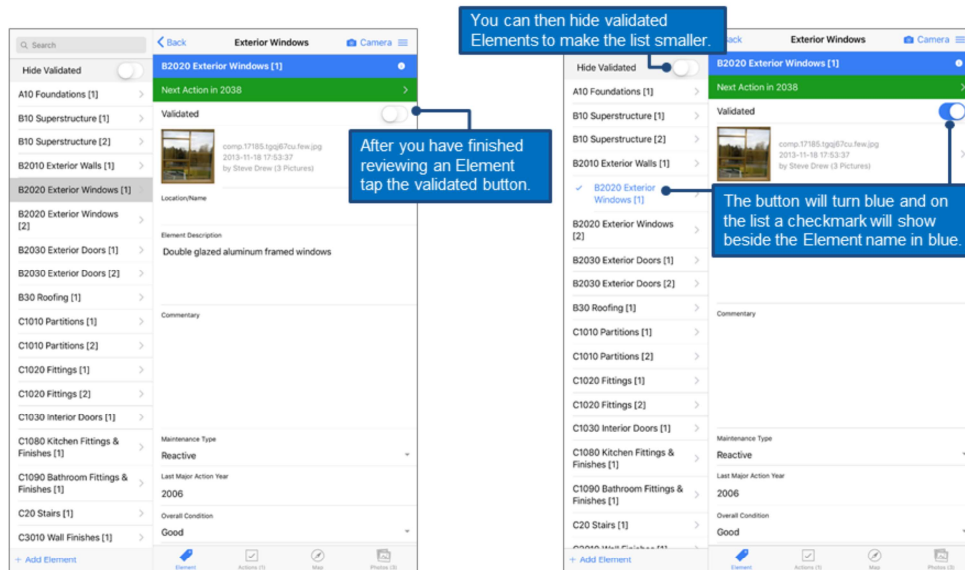
Selecting "No" indicates that they just want to sync with the web tool (this can serve as a backup while they continue to work on the mobile device).

Tips & Tricks

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Using the Validated Button

The validated button on the Element page is a useful feature to help keep track of Elements that you have reviewed or validated while performing an on-site assessment.



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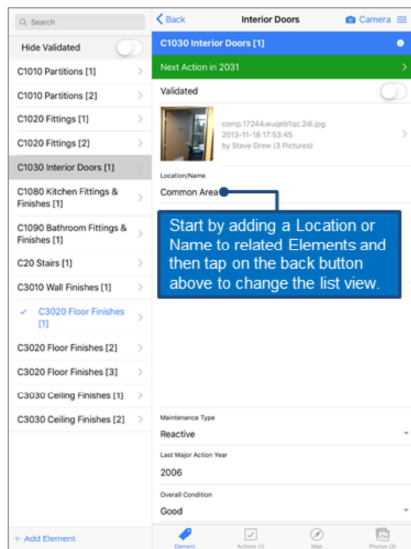
Notes:

This is a non-mandatory but very useful feature for auditors to keep track of where they have been and elements they have fully reviewed.

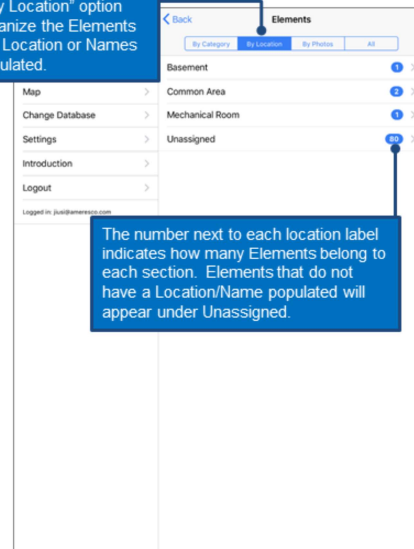
Once an element has been fully reviewed or validated they could then hide it from the list view to simplify their audit review process.

Using the Location/Name Field

The Location/Name field is useful for organizing your on-site review into named sections based on locations within the Asset.



Select the "By Location" option and it will organize the Elements based on the Location or Names you have populated.



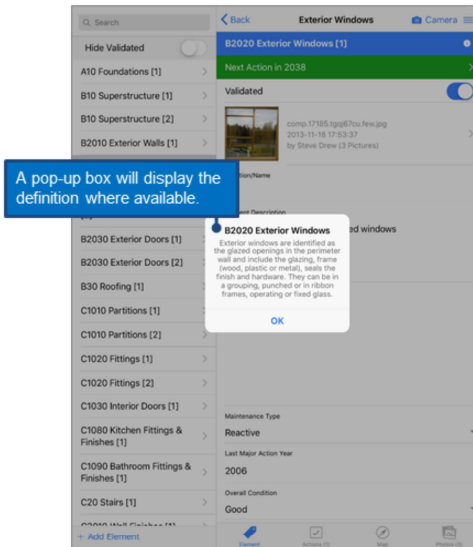
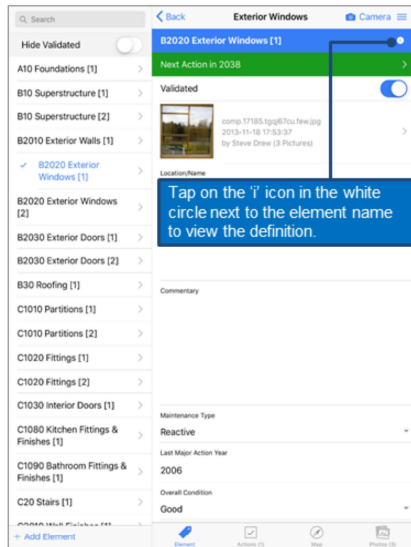
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Notes:

This field will display what has been entered in the location/name against each element, if nothing is populated it will display as "unassigned"

Element Definitions

Element definitions are available to help identify what belongs in each uniformat category.



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Notes:

The definition depends on the Category configuration within each database. Most elements will have a standard definition but some may not be available (lower level uniformat for example)

Configuration & Settings

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Configuration & Settings

Summary of commonly used configuration and settings within AuditPlanner:

The image displays two screenshots of the AuditPlanner mobile application interface. The left screenshot shows the 'Menu' screen with three callouts: 'Audits' (Displays a list of Audits downloaded or available.), 'Change Database' (If applicable you can change to another client database.), and 'Logout' (This will log your account out if you need to switch users.). The right screenshot shows the 'Settings' screen with five callouts: 'Save Pictures to Library' (If you would like AuditPlanner to copy all pictures to your device library turn this setting on.), 'Download lowest pictures' (This will download lower resolution pictures to speed up download time. It will not impact pictures on the server.), 'Live sync to server' (Live sync will automatically synchronize your audit data whenever a connection is available.), 'Change Password' (Use this link to change your password.), and 'Troubleshooting issues' (Use this function if you have been instructed by Ameresco staff to send troubleshooting data.).

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Notes:

Lower Resolution pictures are useful for downloading re-fresh audits.

Live Sync will synchronize your changes to the server without having to use the upload/sync – however you should still perform a final upload once you are completed.

General Audit Guidelines

Data Management Recommendations

Audit Guidelines

This section outlines some general data management best practices for Elements & Actions. Please refer to the Assessment document for a comprehensive best practices guide

Element Modification & Review

- Verify that Element Last Replacement Years are correct.
- Element Brief Description should be filled in i.e. "Asphalt Shingles."
- Component Commentary should be included where necessary based on condition or details i.e. "Shingles are original, have passed their useful life."
- Verify Overall Condition of all Components based on observed condition.

Action Modification & Review

- Verify that Actions exist in appropriate Action Years based on observed conditions.
- Verify that Action Costs are appropriate based on recommended action.
- Do not include maintenance/operations items i.e. "replace door handle on unit 121"
- Ensure that an Action Brief Description has been entered i.e. "Replace Boiler".
- Where applicable include a justification or further detail about the action in the Action Commentary i.e. "we recommend replacing the boiler with an energy efficient model."
- Ensure that Priority Answers, where applicable, have been selected.

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What does it mean to not include maintenance/operations items? Are we not creating 'repair' actions?

Adding Elements & Actions

When do I add a new Element?

Create multiple Elements whenever you are dealing with one or more of the following:

Differing Age = *Boiler Installed in 1985 vs Boiler Installed in 2012*

Differing Condition = *Flooring in Poor Condition vs Flooring in Good Condition*

Differing Type = *Asphalt Shingle Roofing Vs Flat Roofing*

Generally speaking if the Cost or Lifecycle of any items are different then they must be represented as their own Elements.

When do I add a new Action?

Create multiple Actions whenever you are dealing with one or more of the following:

Differing Action Type:

Replacement = *Full Replacement of the Element*

Repair = *Partial replacement or major repair of the Element*

Install = *New install (something that was not previously in the facility)*

Study = *Cost to perform a study of the selected Element*

Remember if you are creating a repair or study action you must add another action to represent the full replacement value and forecasted year.

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Element & Action Consistency

It is important that your audit report is consistent and accurately reflects the observed conditions. Make sure that the information entered on the Element is consistent with the action recommendations.

- Ensure that Element's Overall Condition matches the recommended action/action year:
 - **Good** = Element is performing adequately and no work is foreseen in the next 5 years.
 - **Fair** = Element is operational but replacement is required in 3-5 years.
 - **Poor** = Element requires replacement in next 1-2 years
 - **Critical** = Element is beyond lifecycle or is not functional and should be replaced within 1 year.
- Ensure that Element Replacement Value matches the Replacement Action cost.
- If a Repair or Study Action is suggested ensure that an end of life Replacement action is also included.
- Ensure that the Urgency of Action is appropriate based on the Action Year and the selected Element:
 - **Low** = This Action is not urgent and can be deferred.
 - **Medium** = This Action is not urgent but should be done within the next 2-5 years
 - **High** = This Action is of High Urgency and should be done within the next 1-2 years
 - **Urgent** = This Action should not be deferred and must be done as soon as possible.

Remember to consider the Element when selecting urgency as some items can always be deferred over others. For example repainting walls should always be a Low priority unless there is some health & safety concern.

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Support

To Contact Ameresco Support for help with AuditPlanner™ during this assessment phase:

Please call 1-855-5-Team-AP 1-(855) 583-2627

For KDE Audit support hit "5" at any time (you are not told that 5 is an option)

If all of our agents are busy, please leave a message including:

Your Name

Your email address

Telephone Number

School Name

Your question or a description of your issue

Ameresco support hours are from 08:00 EST to 18:00 EST (7:00 CST to 17:00 CST)

Please feel free to leave a message after hours and we will reach out to you as soon as we are available

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Add support details.