AuditPlanner™

Quick Start Guide

AMERESCO ASSET SUSTAINABILITY

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Introduction:

Process Steps, Installation & Login

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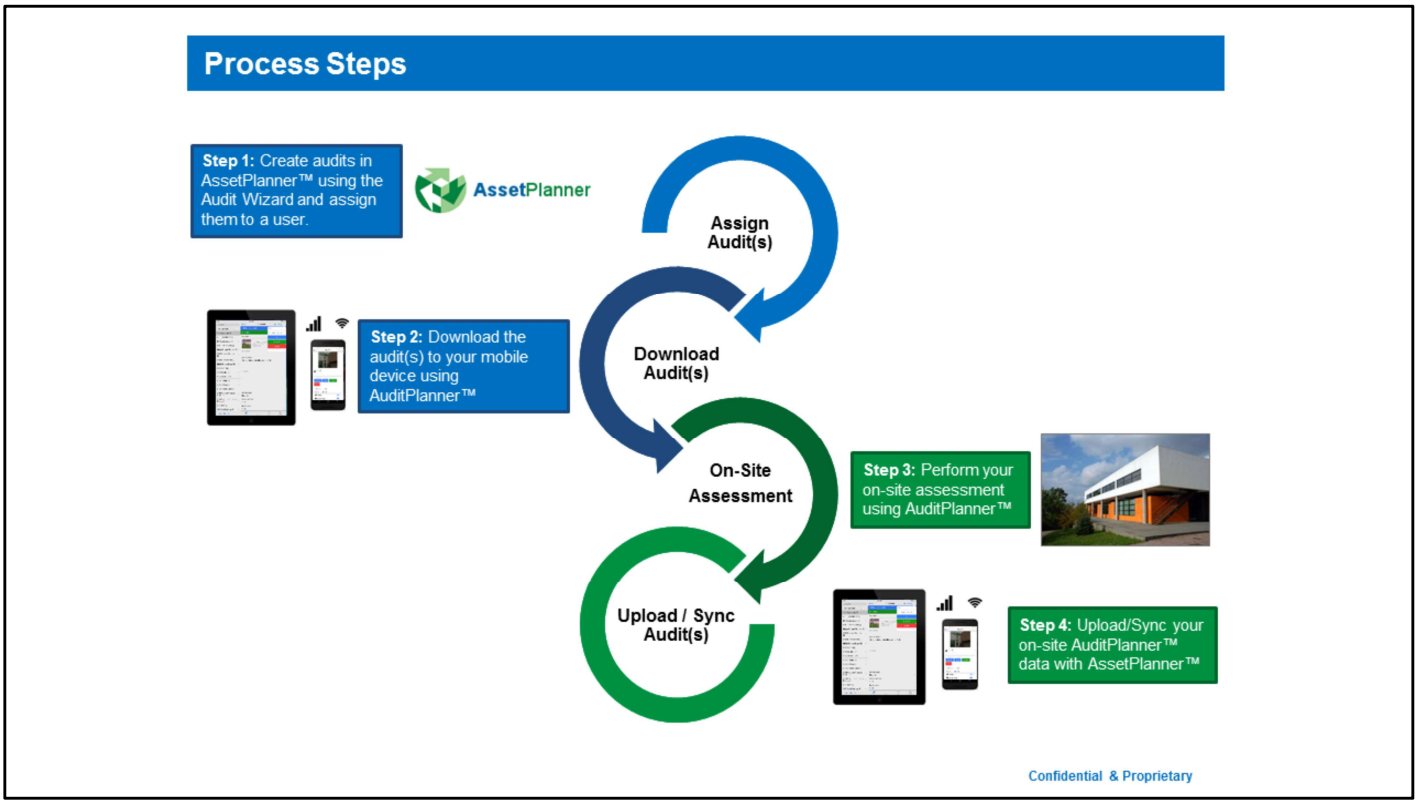


Describe the general flow of the App and how it interacts with the Web software.
Note that for **Step 1** Audits are normally assigned to the Auditors by Ameresco or the Client.

Best practice is to follow these steps:
Download
Perform assessment on mobile device
Upload completed assessment
Finalize Audit in web interface

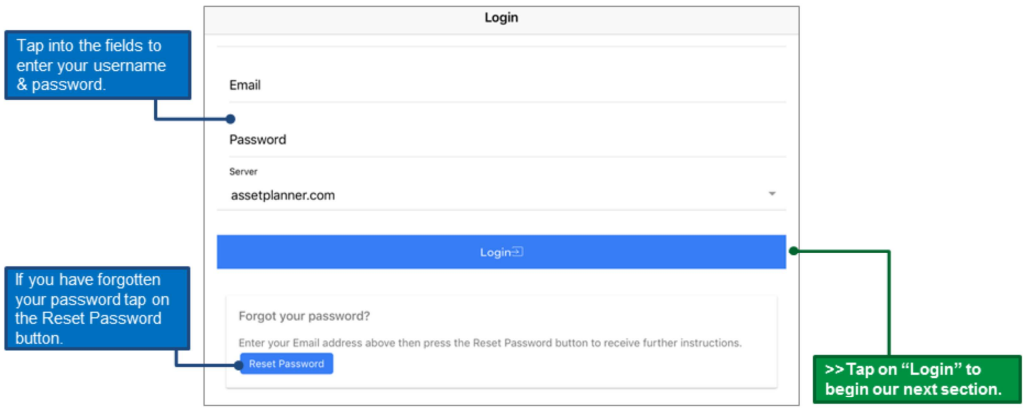
Make a note that they don't want to be doing too much back and forth – the App will warn you if your data is out of sync but if they follow the best practice above they will have no issues.

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.*



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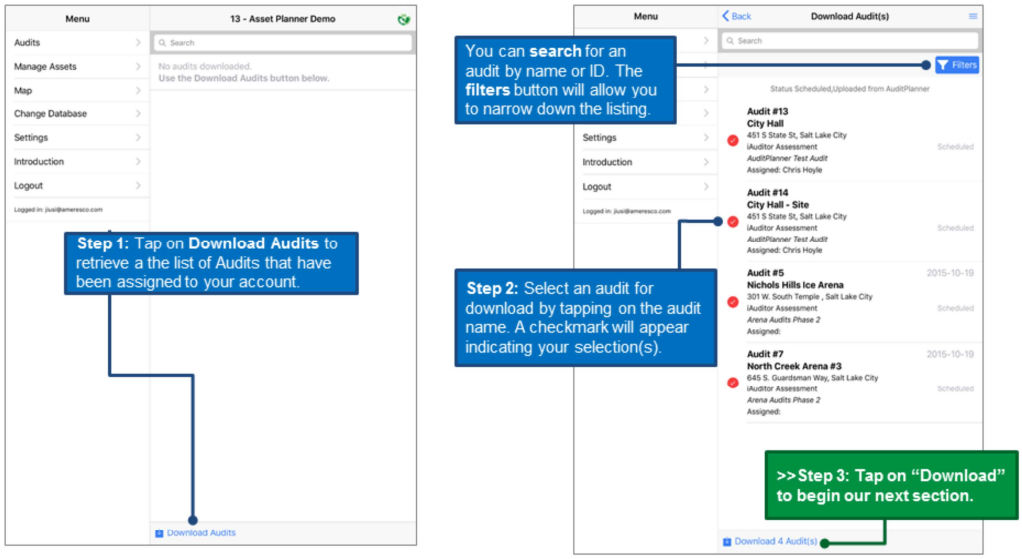
Note that they will need to have their device connected to the internet for these next three slides.

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.



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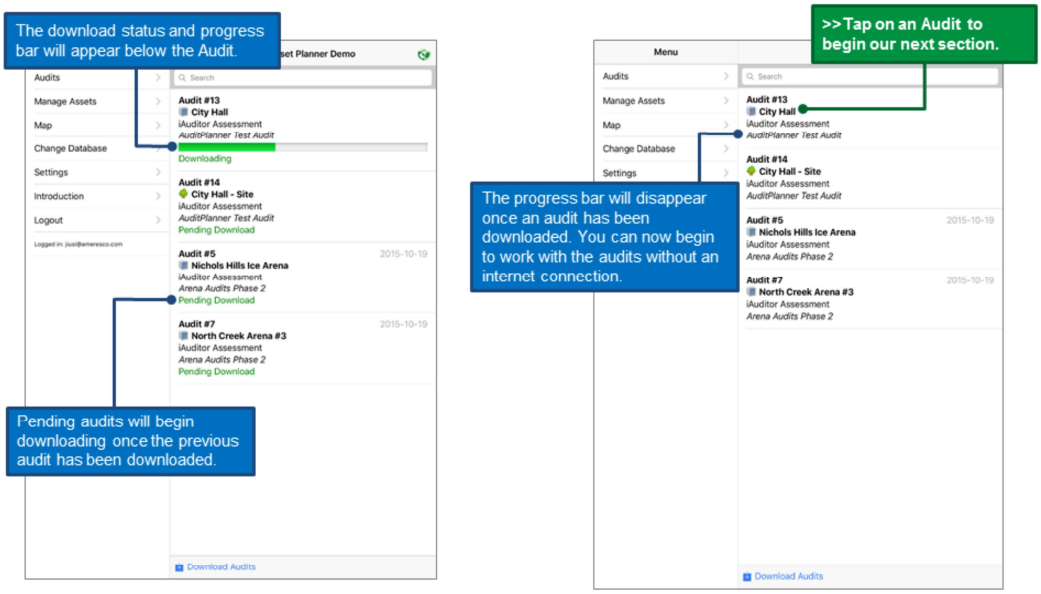
Recommend that they download in small batches to ensure that the files are downloaded correctly and their wireless signal or device doesn't drop the connection.

Downloading Audits

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



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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

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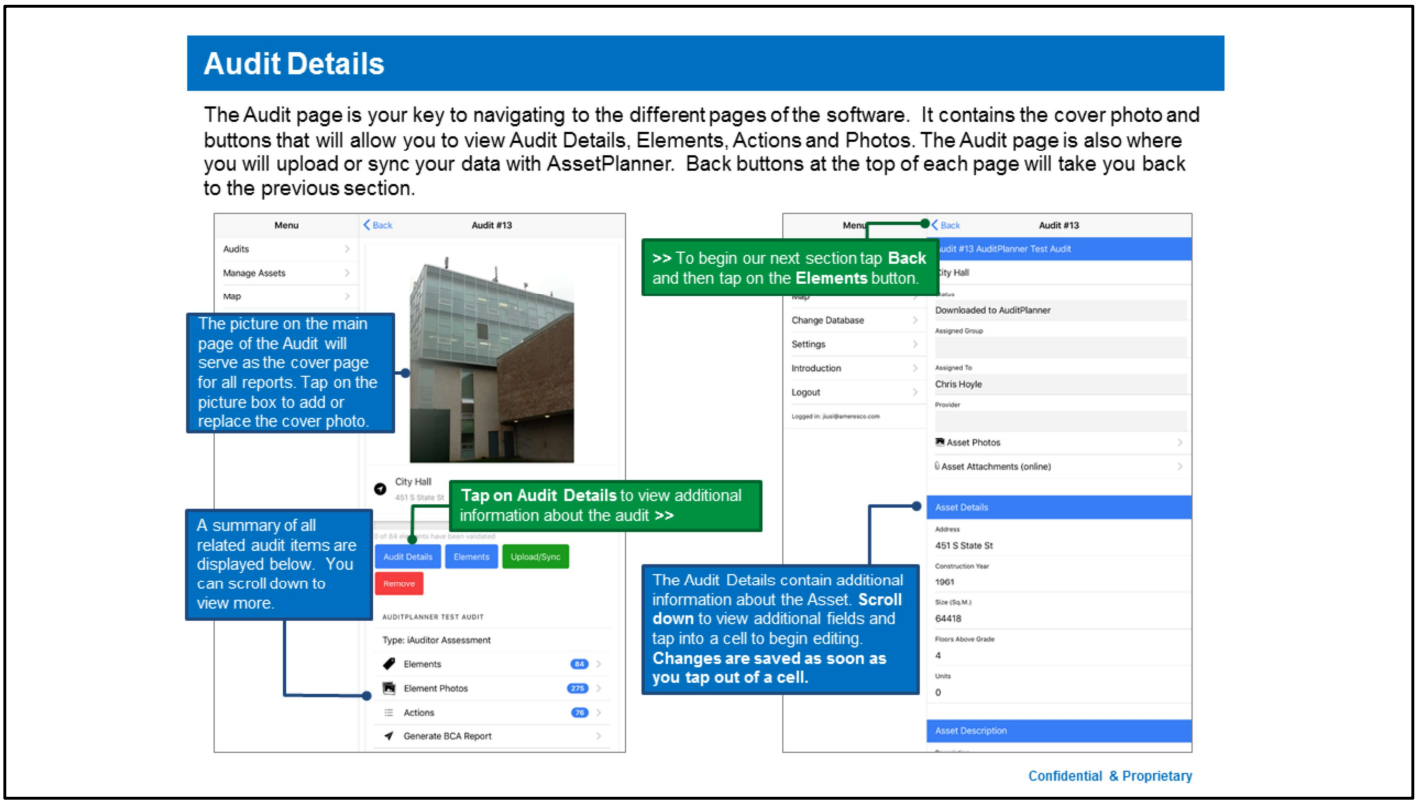


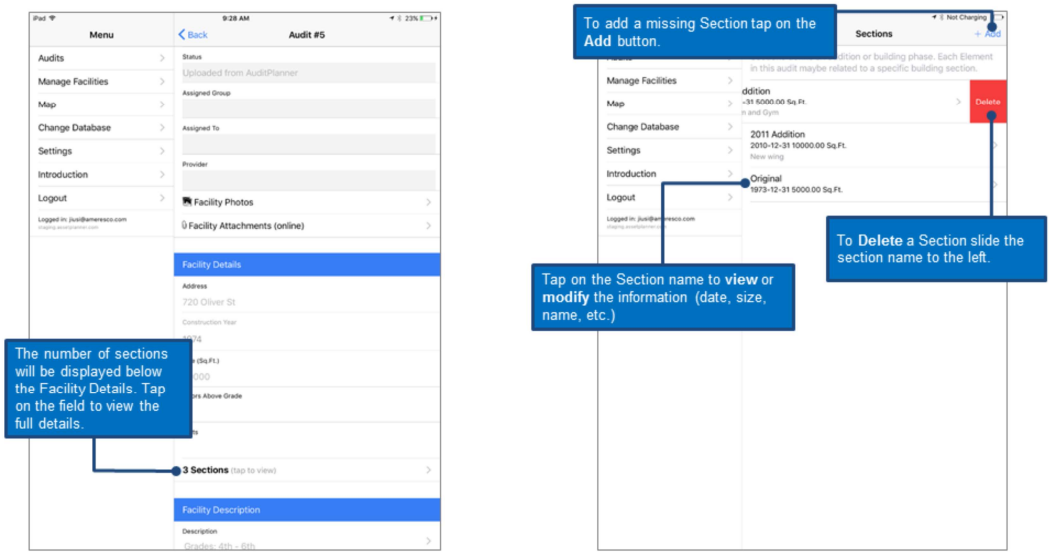
Describe this page as the “report cover page” and summary for their assessment.

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.

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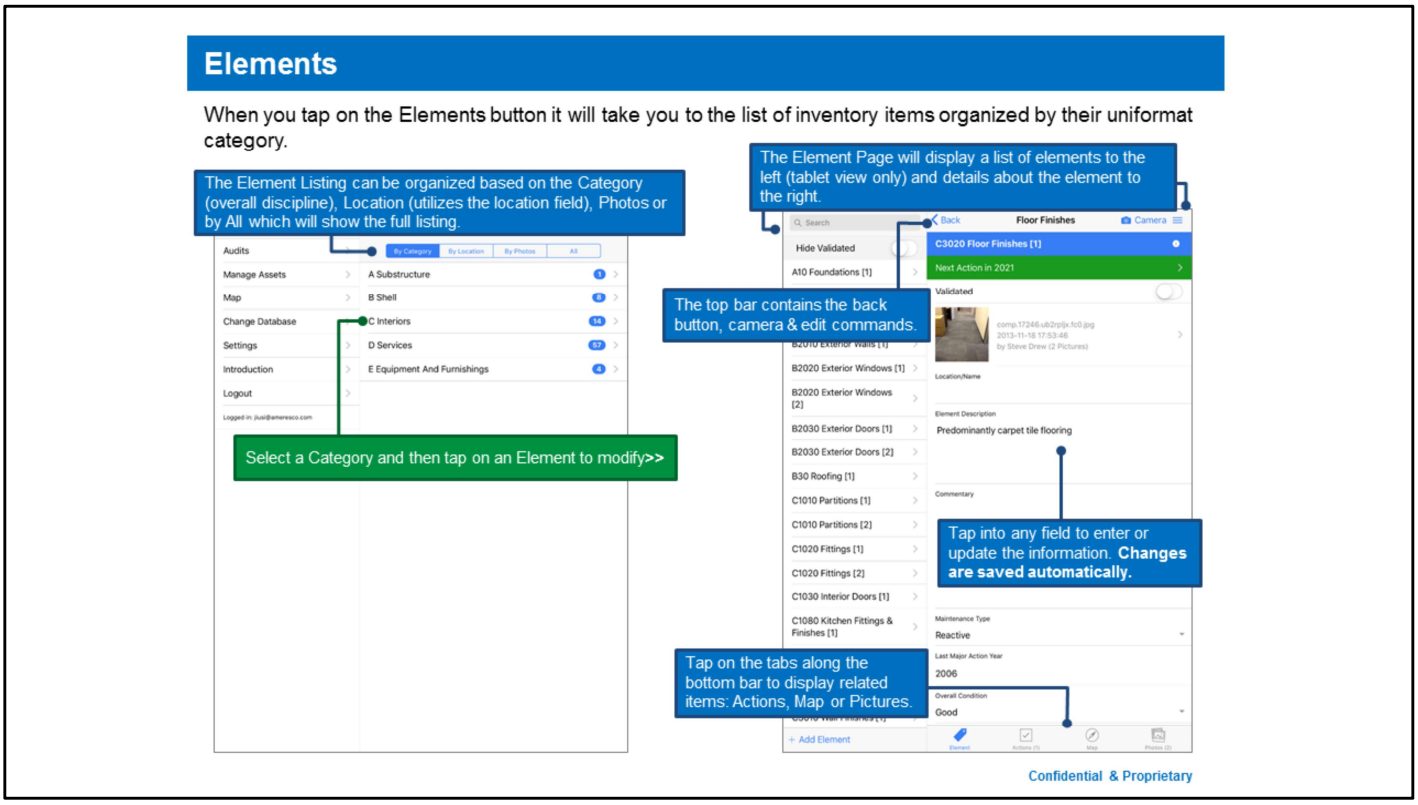
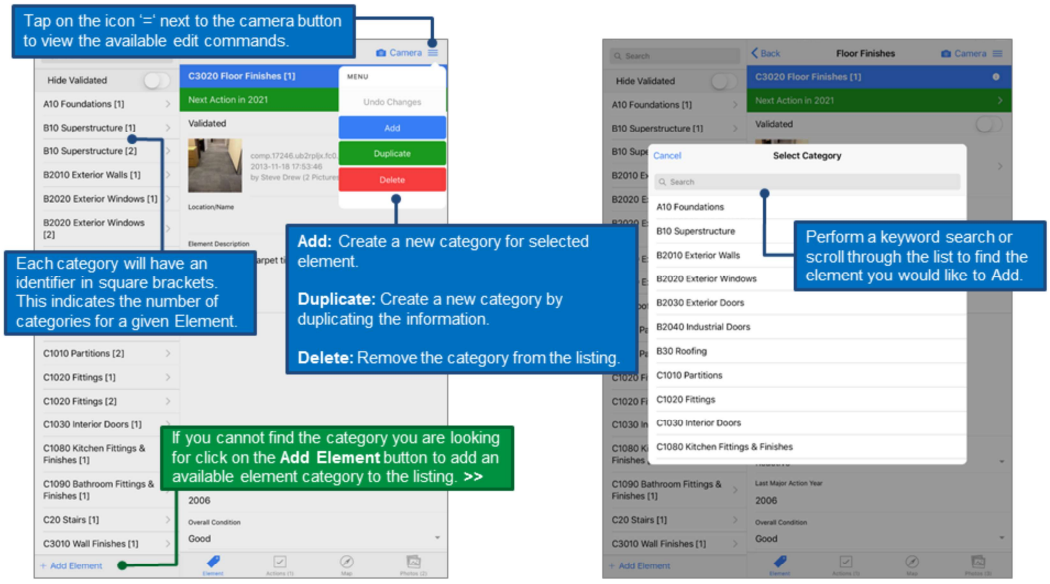


Explain the category structure is based on the uniformat category codes and if they need more information they can click on the 'i' icon next to the element name in blue for a definition (if available).

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.



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Notes:

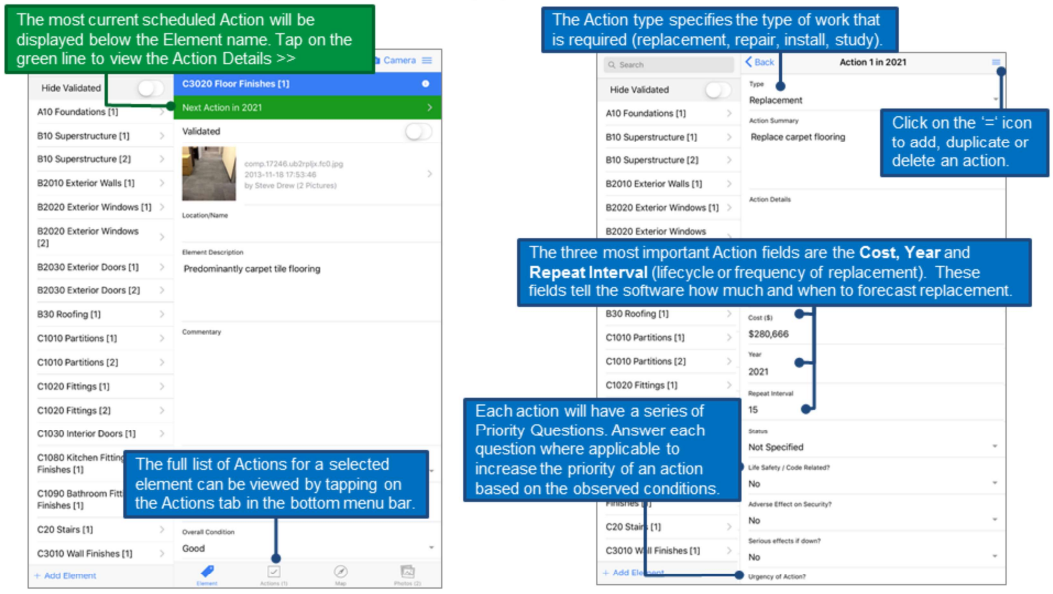
The element listing and available categories are generated based on the template assigned to each Asset

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.



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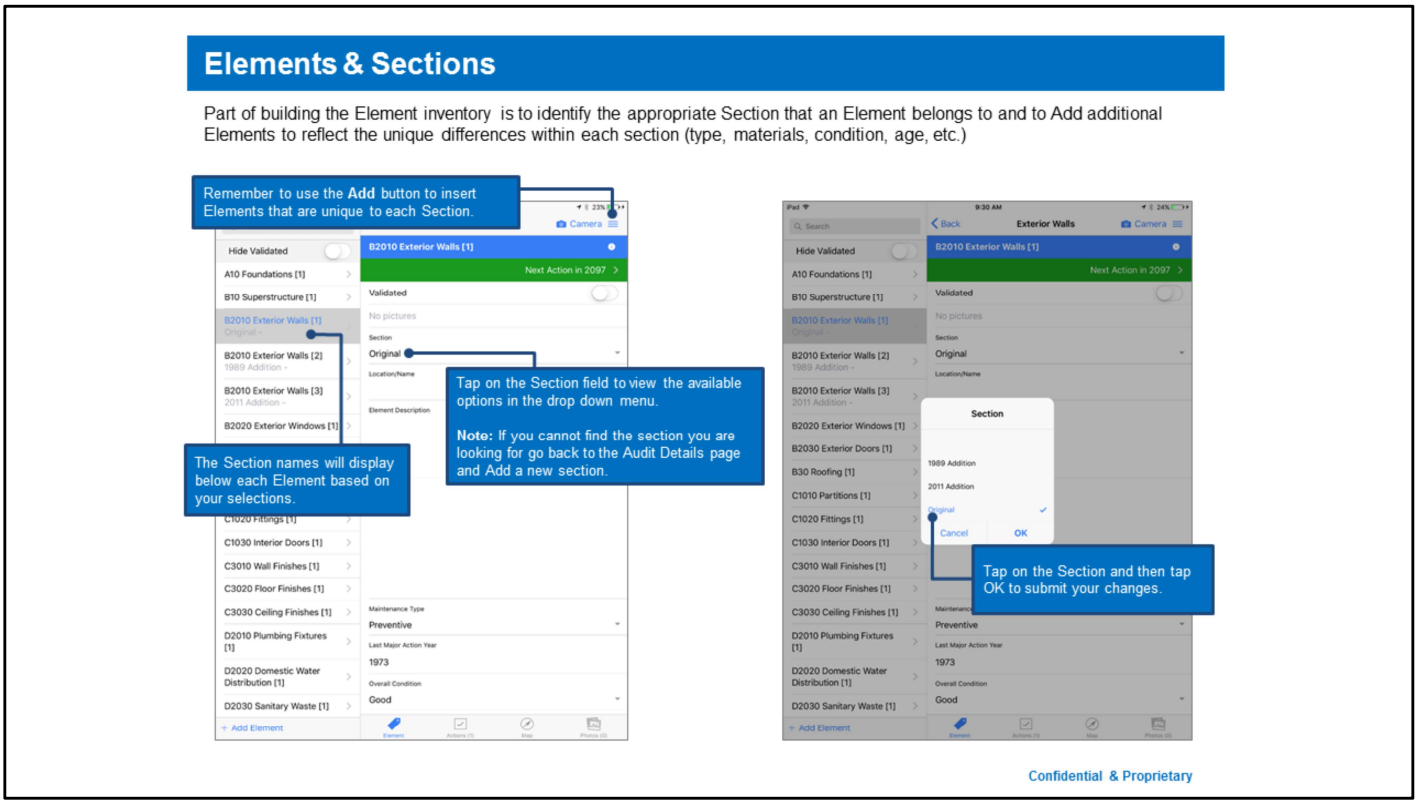
Notes:

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



Notes:

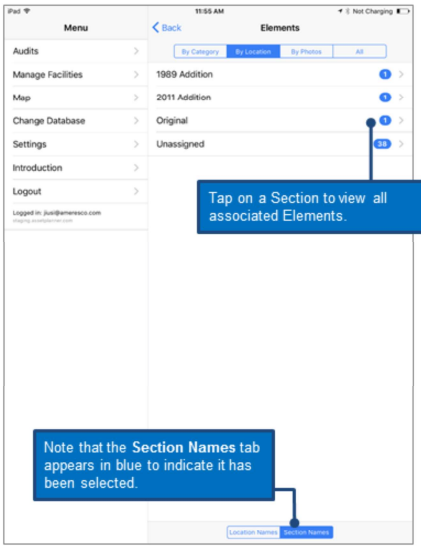
The element listing and available categories are generated based on the template assigned to each Asset

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

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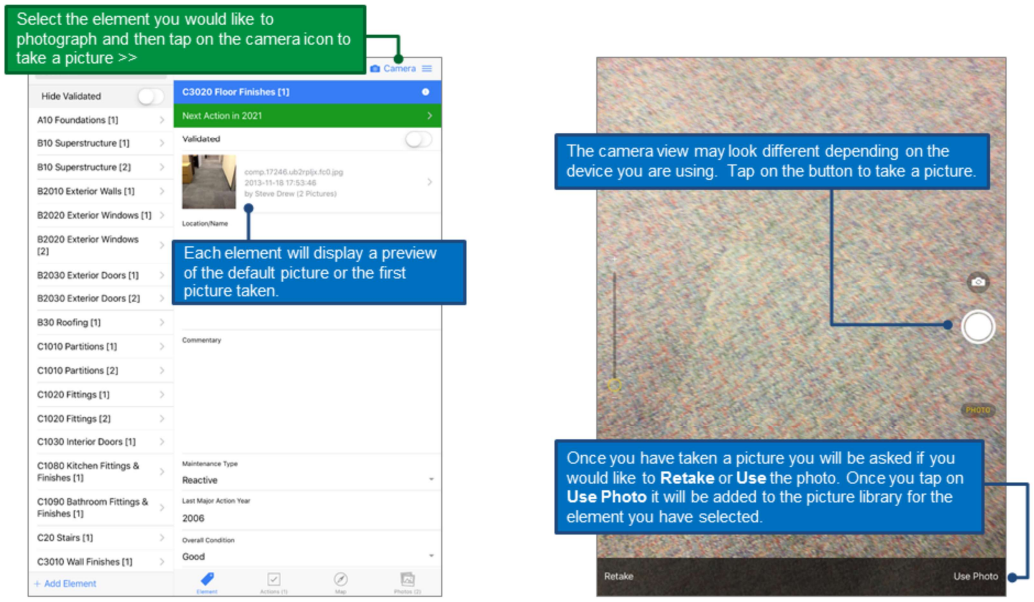
Taking Pictures

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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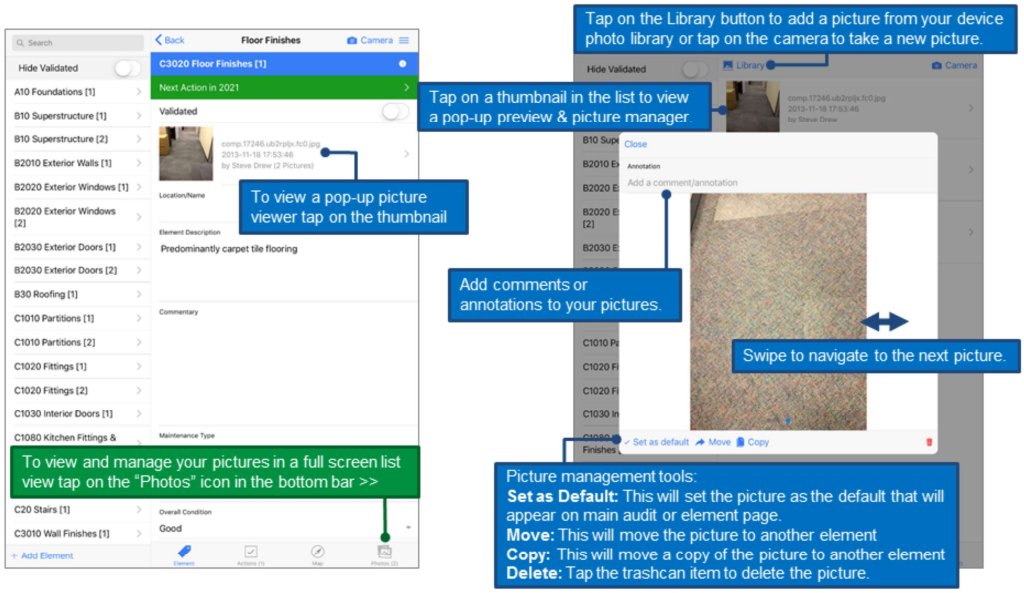
Notes:

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 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.



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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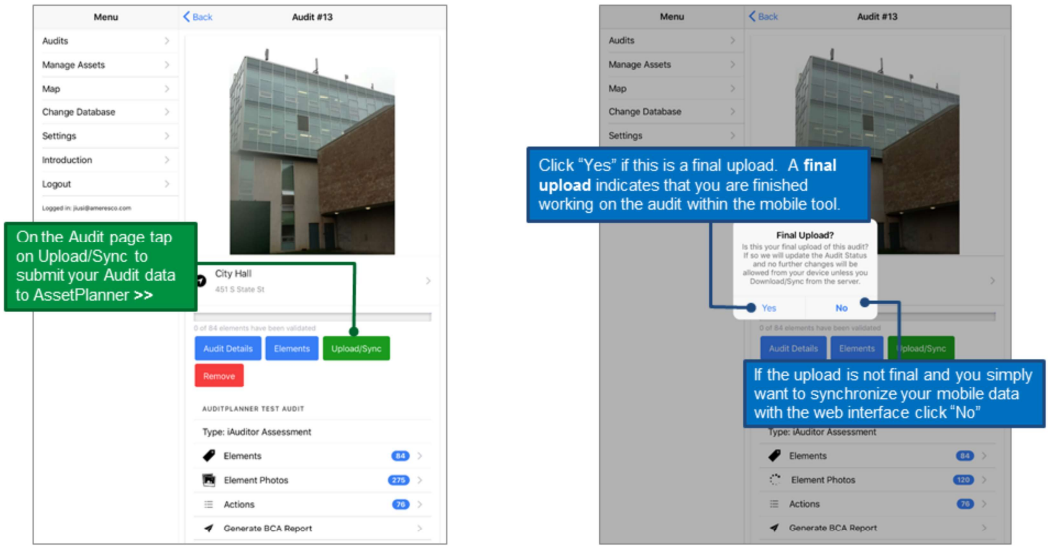
Upload & Synchronizing Data

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.



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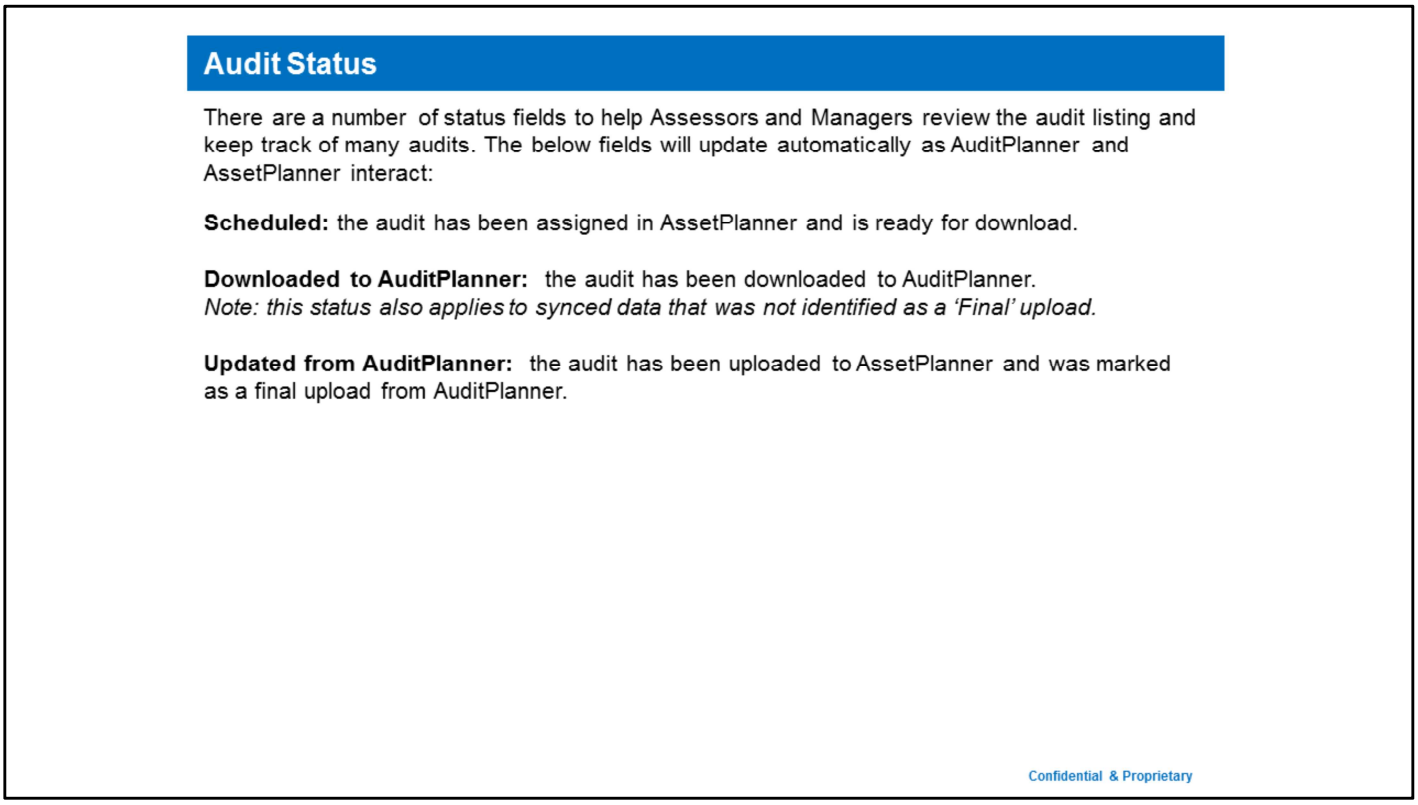
Notes:

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



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.

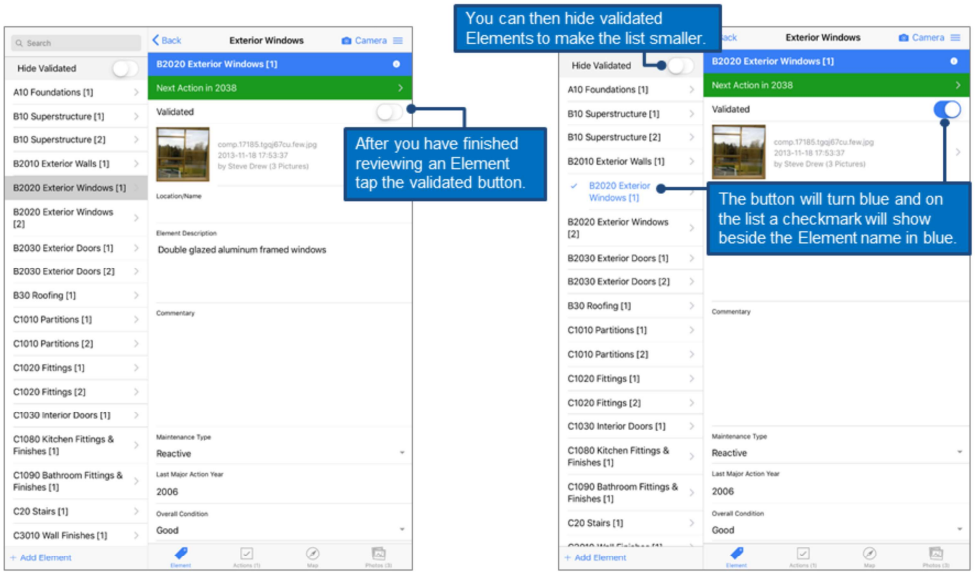
The "Final Upload" function is a way of indicating that their job is complete on the mobile tool. It can either mean they are completely finished with the audit OR they are finished on the app and are now going to finalize in the web audit tool within AssetPlanner.

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

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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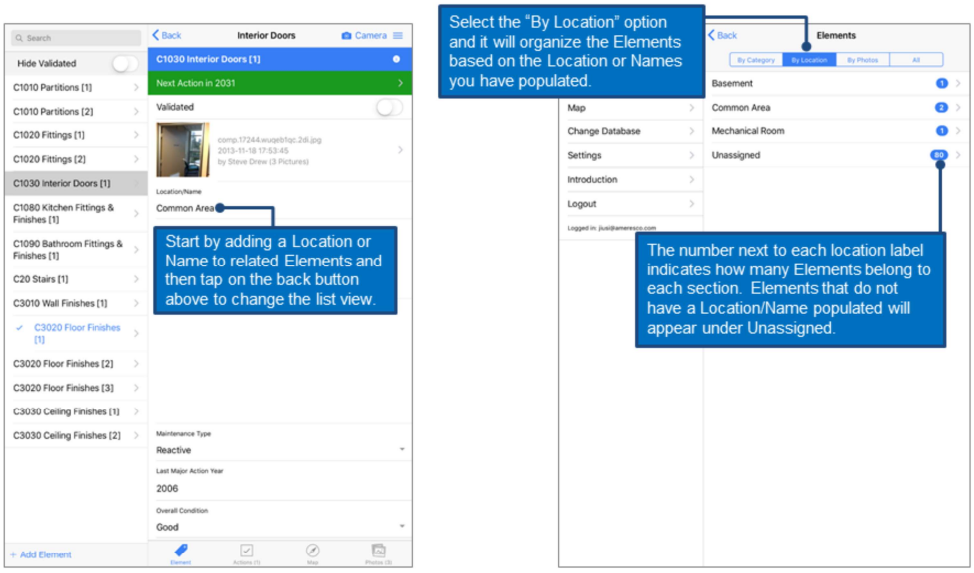
Notes:

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.



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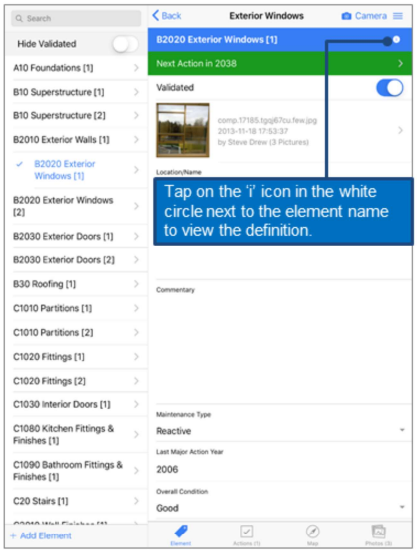
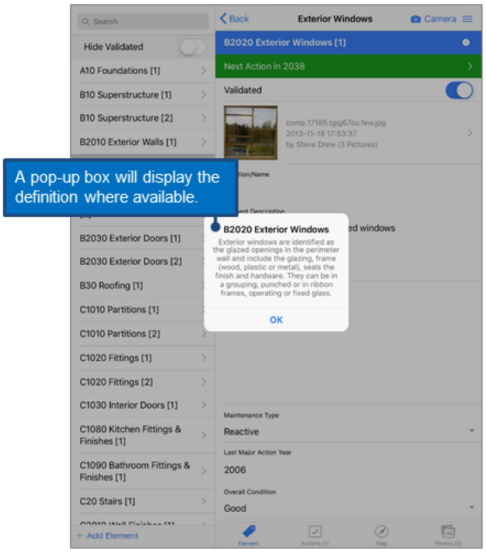
Notes:

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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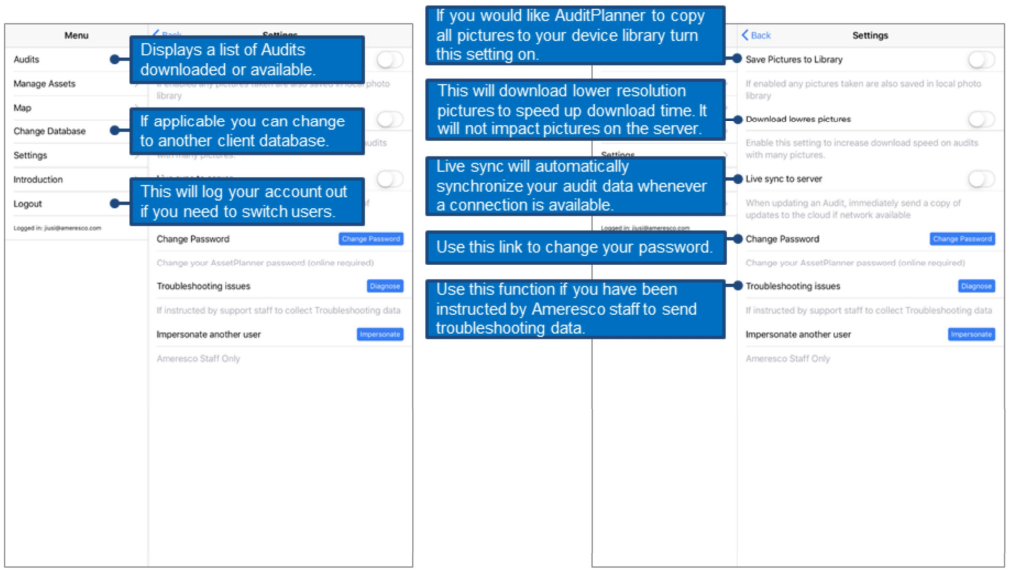
Configuration & Settings

Summary of commonly used configuration and settings within AuditPlanner:



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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

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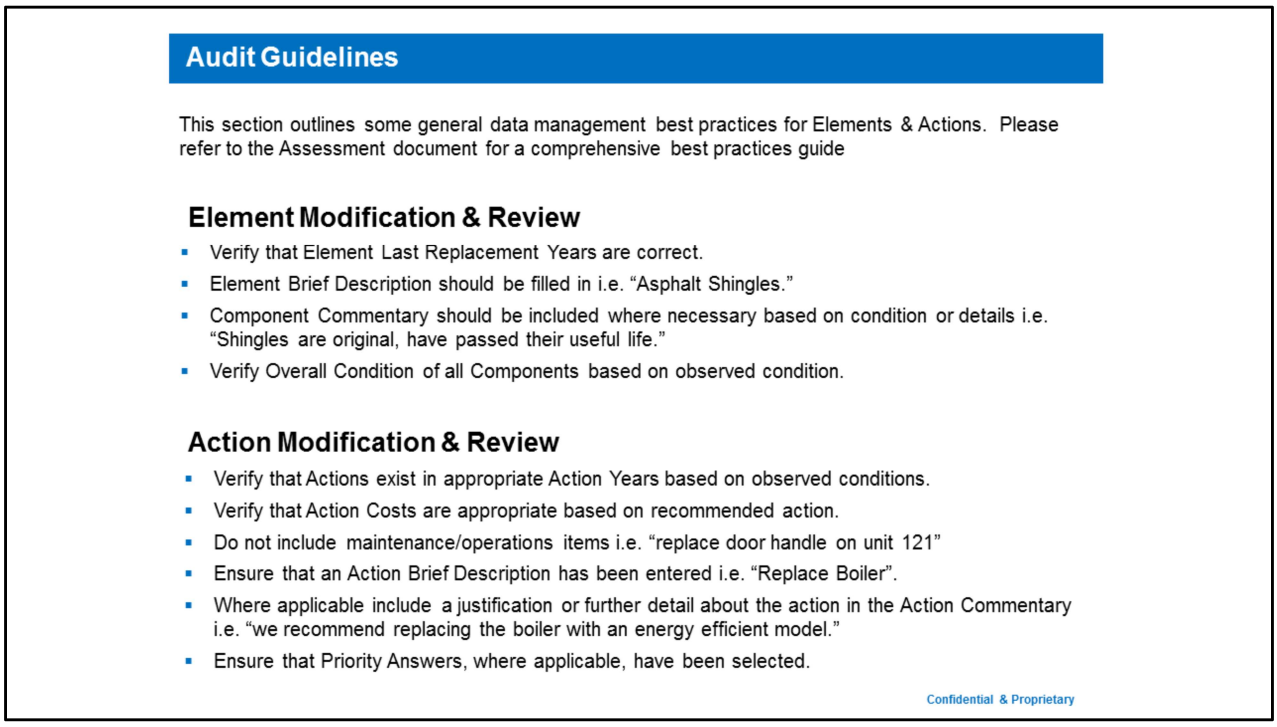

What does it mean to not include maintenance/operations items? Are we not creating 'repair' actions?

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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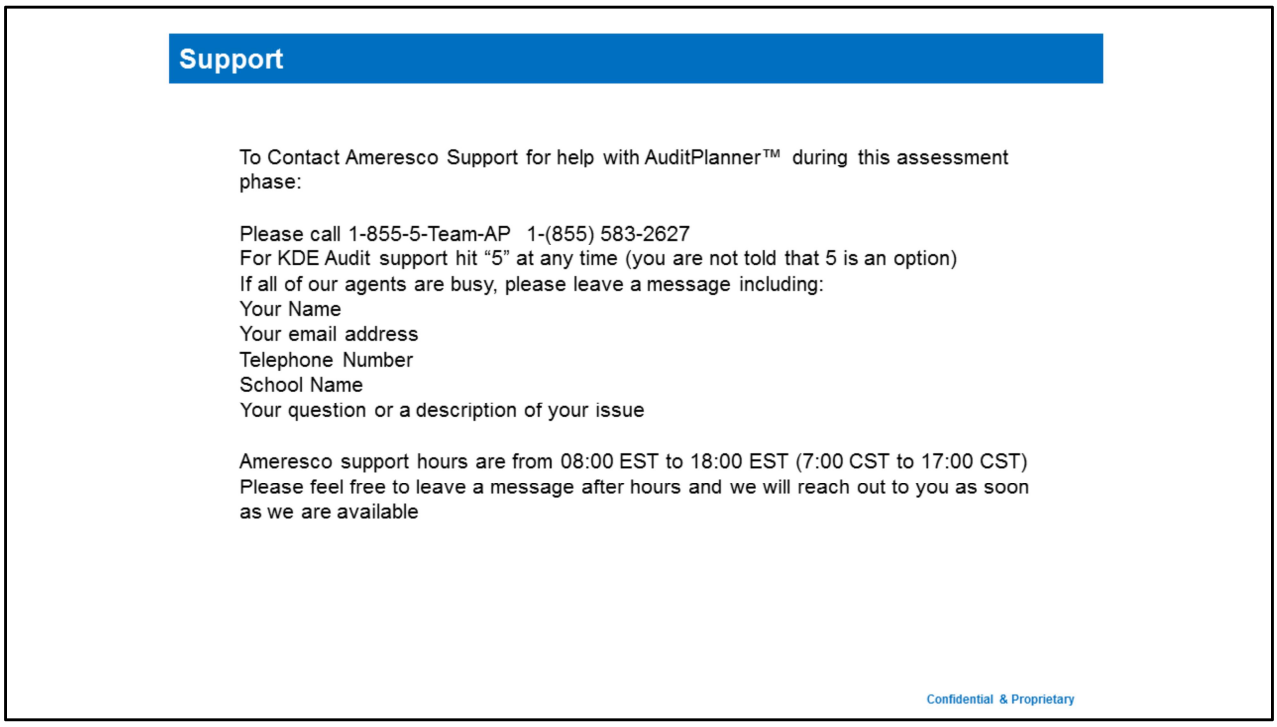

Add support details.