Introduction to the Audit Template

Webinar
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10:00 AM – 11:00 AM PDT

Presented by
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BTO's Building Energy Data subprogram:

www.energy.gov/eere/buildings/building-energy-data
Join Upcoming DOE Data Tool Training Webinars!

**Introduction to Asset Score**
April 28, 1-2pm ET
Learn about Asset Score, which is a national standardized tool for assessing the physical and structural energy efficiency of commercial and multifamily residential buildings.

**Introduction to SEED**
April 29, 3-4pm ET
Learn about the Standard Energy Efficiency Exchange Database (SEED) Platform, a central hub for building energy datasets located across multiple sources. SEED makes data collection, analysis, and sharing simpler and easier.

**Introduction to SEED: Advanced Features ([Register Here](#))**
May 19, 3-4pm ET
Learn about SEED’s advanced capabilities, including GIS data integration, uploading interval and meter data, and the ability to connect with other tools such as Portfolio Manager, BuildingSync, Audit Template, and the Open Efficiency Platform.
Learning Objectives and Course Outline

Learning Objectives

• Awareness of the Audit Template tool
• Understand basics of data collection, tool navigation, data entry, and audit reports
• Insight into tool best practices
• Know where to go for help and additional resources

Course Outline

I. Introduction to the Audit Template
II. Features: At-a-Glance
III. Demonstration
What is the Audit Template?

• Free web-based tool to collect, store and report building energy audit data
• Includes fields present in an ASHRAE Level 2 audit
• Produces an audit data report which includes calculated tables outlining building energy use and energy efficiency measures
• Audit data report may be submitted to cities to demonstrate audit completion for ordinance compliance

**New York:** Applicable commercial, mixed-use and residential buildings must submit an Energy Efficiency Report (EER) once every ten years.


**San Francisco:** Energy Audit - required every 5 years for nonresidential buildings.

Audit Template Highlights

- Aligns with new development of industry standards (ASHRAE/ACCA Standard for Commercial Building Energy Audits)
- Improves the current audit data collection/reporting process by:
  - Standardizing inputs and outputs
  - Automating error checking and validation of inputs
  - Verifying required fields
- Seamless data transfer to other tools using BuildingSync® (https://buildingsync.net)
- Easy access to previously entered audit reports
- Leverage Asset Score’s existing software capability
Asset Score Toolkit

Free web-based suite of tools available at: buildingenergyscore.energy.gov

- All 3 tools gather similar building audit and analysis inputs
- Useful to same audience of users
- Working to connect the tools to each other and interact with other building analysis tools
Asset Score and Audit Template Linked Capabilities

- **Asset Score Preview**: 7 Data Points
  - Screening & prioritization for EE programs

- **Asset Score Full Analysis**: 30-100 Data Points
  - Asset valuation
  - Simplified modeling for incentives and rebate programs

- **Asset Score Audit Template**: 100+ Data Points
  - Energy audits
  - Retro-commissioning guidance

- **Open Studio Model**
  - Basic Building Characteristics
  - Open Studio tools Building Retrofit

- **Portfolio Manager**
  - Benchmarking & disclosure

- **SEED Data matching & management**

- **Private Sector Tools**

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**1124x9**

**Portfolio Manager**

**Open Studio**

**BuildingSync**

**ENERGY STAR**
How the Audit Template Works

1. Choose City Template
2. Perform Audit
3. Submit

Auditors
- Mark Compliance
- Download Reports
- Track Progress

City Officials
- SEED or Other Tools
- Input Mode
- Database
- City Dashboard
- CSV Output
- PDF Output
- BSXML Output
- Dashboard
- Mark Compliance
- Download Reports
- Track Progress
Audit Template: At-a-Glance

- Select ‘Audit Template tab’
- Select ‘Audit Report’ button and
- Select a City to start a report
Audit Template: At-a-Glance

Example:

Please review each section of the forms. Items marked with a ★ correspond to ASHRAE Level II inputs, and items marked with a ☑ correspond to city inputs. A ★ indicates a field that is required for city reporting.

- **System Type ★**: Direct Fired - Storage
- **Location of Equipment ★**: Mechanical Room
- **Venting Type ★**: Condensing
- **Approximate Year Installed ★**: 1999
- **Fuel Source ★**: Natural Gas
- **Efficiency Units ★**: AFUE

Reports available for download:
- CSV (In-Progress)
- PDF (In-Progress)
- XML (In-Progress)

Required Input:
- ASHRAE L2 Input
- City Specific Input
Connect and log in to Asset Score

Register for an account and log in:

https://buildingenergyscore.energy.gov

Getting Started: Register for an account, log in, select the Audit Template tab from the home page, add a report, input data and submit the report. View the Quick Start Guide for details.
Audit Template Data Input


1. **Building Information**
   
   Select “NYC Energy Efficiency Report” for New York City audit reports from the green Audit Reporting Tool button drop down menu, and complete BIL and BIN entries. Select “Other City Report” for all other audit reports. Enter building name, report type, year of construction, gross floor area, and location. Click the “Create Building” button to continue.

   *Note: Report type selections identify the name of the city or jurisdiction that will be receiving the audit report.*

2. **Contact Information and Audit Details**
   
   Complete sections that include audit details including and audit completion dates, and audit team and building staff contacts.

3. **Facility Description**
   
   Complete sections related to information of the audited building, including building use types, building envelope characteristics and major installed equipment components such as HVAC, lighting, and service hot water systems. The information may be based on on-site observations, review of architectural drawings and specifications, measurements or engineering calculations.

4. **Utility Data and Benchmarking**
   
   Specify energy supply sources and enter energy use data. An annual summary displaying average annual energy use and cost by energy supply source will be generated. Metering and energy systems configuration entries may be required for selected city reports. Benchmarking data, including the building’s Energy Use Intensity (EUl) and target energy savings may also be provided in this section.
5. **Energy Use Breakdown and QA/QC**

Enter estimated building energy use by end use for all energy supply sources. Totals will be calculated and displayed in an ‘End Use Summary’ table. These will be used to verify that the estimated energy use by end use estimates align with historical energy use.

6. **Energy Savings Opportunity**

Enter packages of recommended low cost, no cost, and potential capital energy efficiency measures and energy and cost savings that have been manually calculated or generated by a third party energy modelling software. Calculated net measure costs, ROI and payback years will be displayed.

7. **Submit to City**

Select the ‘Submit to City’ button to submit a completed audit report to city officials associated with the selected Report Type. Once the building has been submitted, the City would be notified that audit report files are available to download. Users will also receive a confirmation email and may download the same files for their own records.

*Note:* Some Cities may have a specific certificate that would need to be signed and submitted along with the audit report. The ‘Submit to City’ screen allows auditors to upload a completed and signed version of such documents. Some City reports may also include a prompt for a confirmation of audit completion affidavit that must be entered before submission.
Creating Contacts and Sharing Buildings

Share buildings with contacts:

- Add Contacts
- Share Buildings
Importing and Exporting Audit Report Buildings

Exporting Audit Report Buildings
• Select the yellow Download button ‘XML’
  Or
• Download in bulk from the home page

Importing Audit Report Buildings
• Select the green Import Buildings button
• Select ‘Choose File’ and click on an XML file
• Select the blue Import BuildingSync XML button
Audit Template – User Support

Asset Score Help Desk

• Users Guide
• Community Forum
• Support Ticket process
• Rapid Response

Resource page

• https://buildingenergyscore.energy.gov/resources
• Quick Start guide
• Videos, example reports, etc.
Thank you!

Audit Template
buildingenergyscore.energy.gov

Asset Score Help Desk
help.buildingenergyscore.com