BUILDING ENERGY
AUDIT
TEMPLATE
U.S. DEPARTMENT OF ENERGY

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:*
>
> *ASHRAE Level 1 or 2 audit inputs*
> *Program or jurisdiction specific inputs.*
> ★*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.*

* 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

1. Initial Setup: Registering to Use the Tool

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

- To create an account, visit https://buildingenergyscore.energy.gov.
- 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.

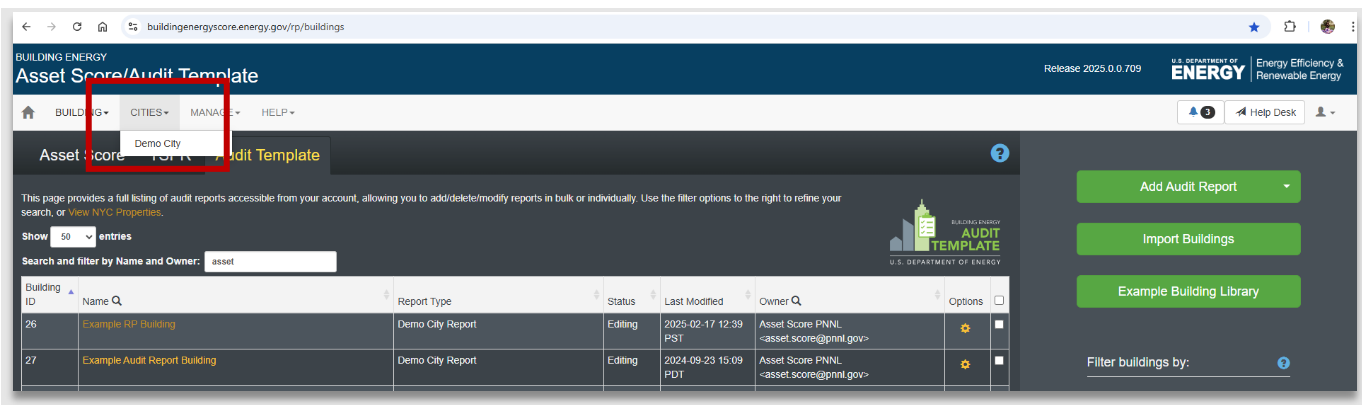

Figure 1: Program appearing under "CITIES" menu in Audit Template

2. Creating and Updating Audit Report Templates

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 CTC Detailed User Guide.

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.

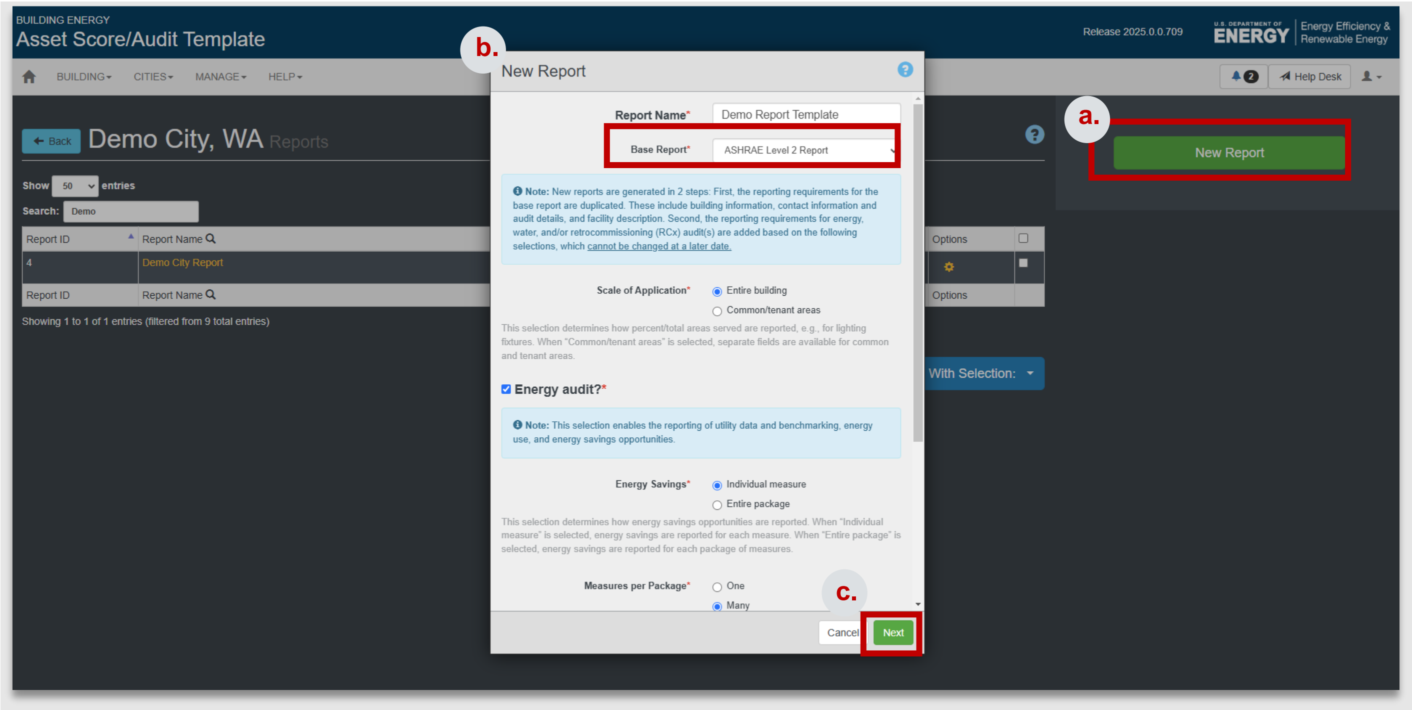

Figure 2: New Report Template Screen

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. Please inform the Audit Template team, who will provide a final review before publishing the reporting template. Once published, the template would be available for auditors to use.

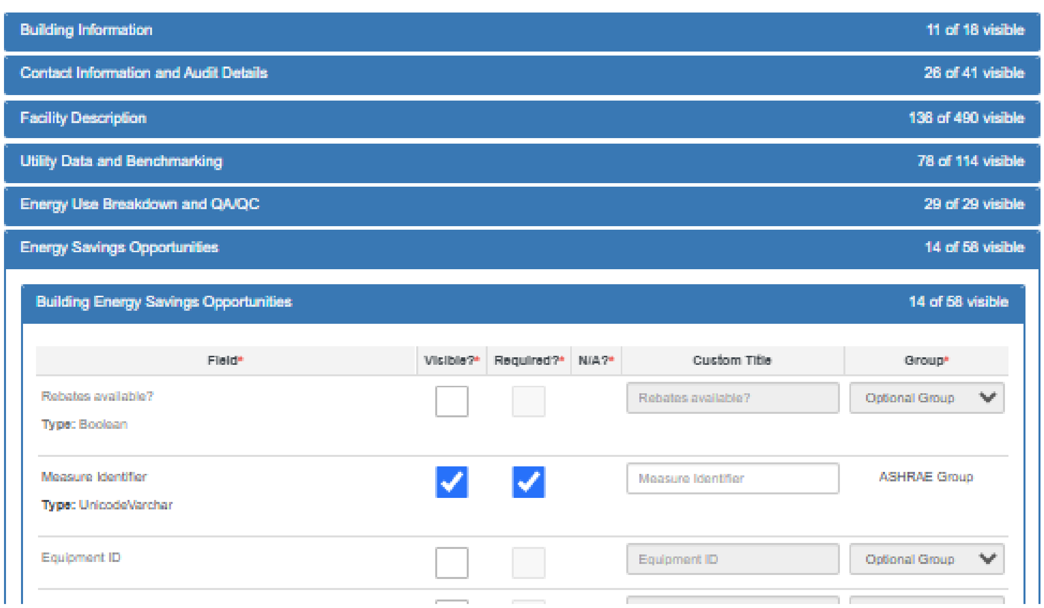

Figure 3: Custom Template Creator (CTC)

3. Testing Report Templates

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).

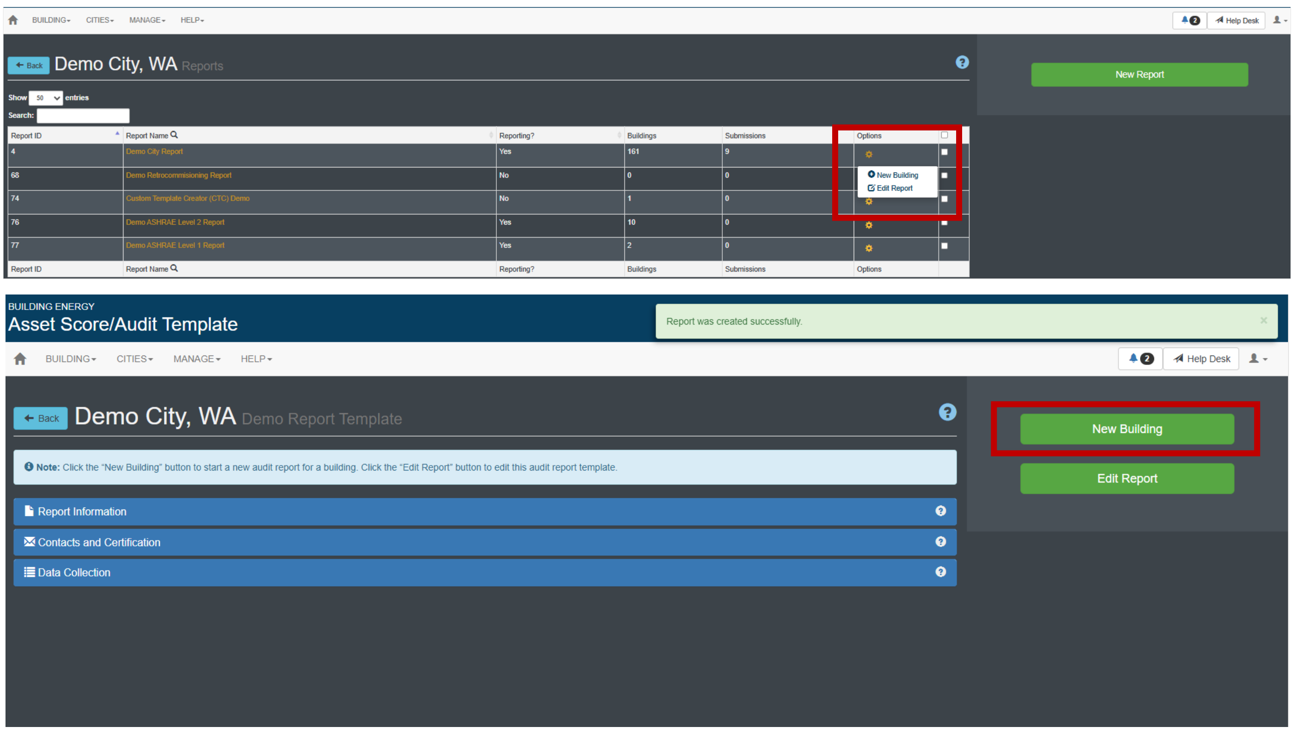

Figure 4: New Building using Options menu (Top), New Building using the “New Building” button (Bottom)

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.

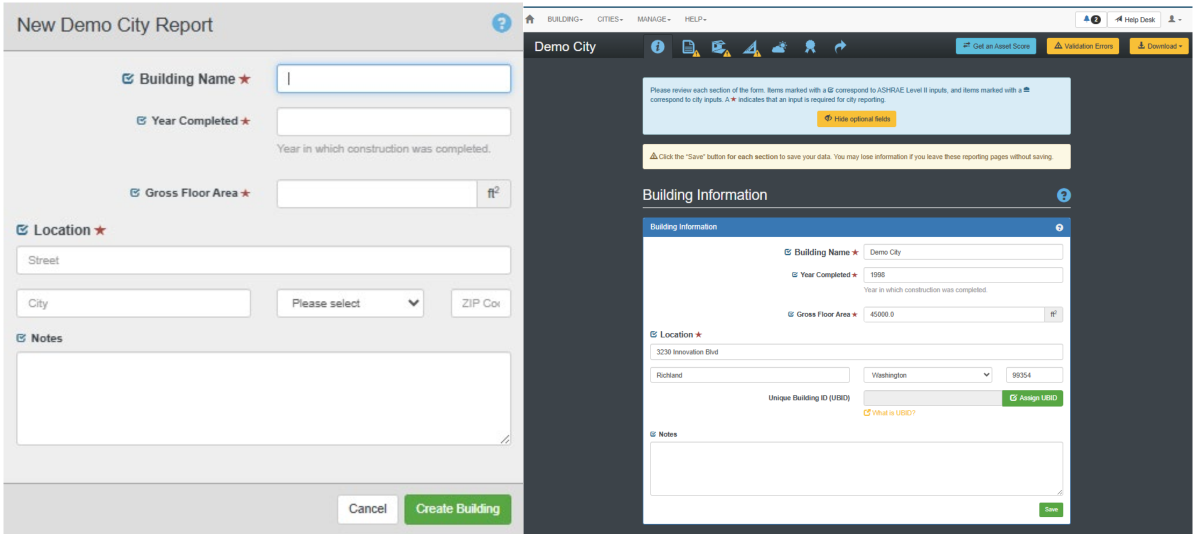

Figure 5: General Building Information Modal Window (Left), Auditor Interface for the report (Right)

4. 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**.

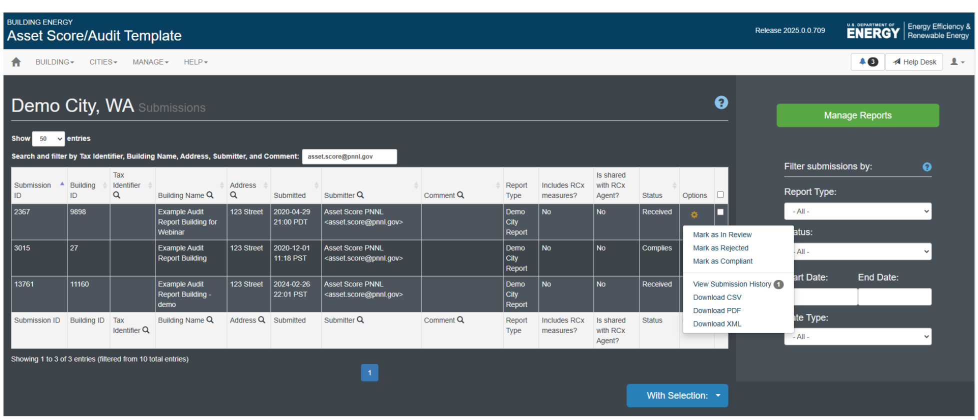

Figure 6: Jurisdiction Dashboard

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 – Audit Template User Guide 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.

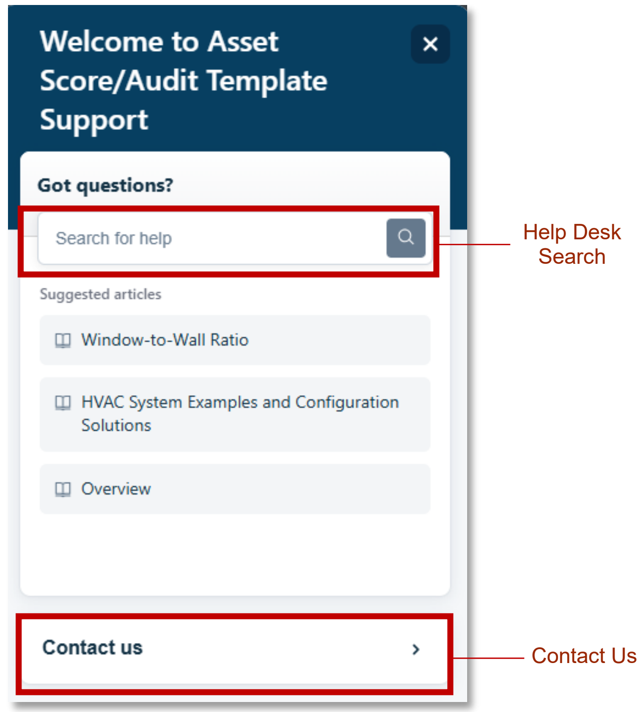

Figure 7: Help Desk and Contact Us