

## **Weatherization Assistant Version 8.3: Getting Started Guideline**

*Updated: May 19, 2008*

This guideline outlines the initial steps you should follow after Version 8.3 of the Weatherization Assistant has been installed for the first time to set up your agency and configure the Setup and Supply Libraries. For new users of the Weatherization Assistant, this guideline also outlines how you can create a client and start an audit for that client. The document “Weatherization Assistant Version 8.3: Downloading and Installation Instructions” should be consulted for guidance on how to obtain and install the latest release of the Weatherization Assistant.

The first section of this guideline outlines a standard, manual method for setting up your agency and the Setup and Supply Libraries. If you previously used Version 8.2 of the Weatherization Assistant, the second section of this guideline describes an alternative setup method that imports all your agency information, selected clients and their audits (if desired), and Setup and Supply Library information from Version 8.2 into Version 8.3 (importing from Version 7.4 is not possible). This may be desired to reduce the time needed to reenter agency or Setup and Supply Library information compared to the manual method, and/or to maintain a contiguous set of clients and audits in your Version 8.3 database. You should decide on which setup method you want to use by carefully reading over the steps required before embarking on either approach. If you previously used Version 8.2 and are going to use the alternative setup method, do NOT implement any of the steps outlined in the standard setup method because agency or library names may be entered in Version 8.3 that are the same as in Version 8.2 which will cause confusion.

### **STANDARD SETUP METHOD**

#### **Enter the Installation ID**

1. The first time you start the Weatherization Assistant after installation, you will be asked to enter an “Installation ID” (see Fig. 1). The entry requested is a brief name identifying this specific installation of the software. If this will likely be the only installation of the Weatherization Assistant in your agency, this entry is not vital and may be something such as the acronym of your agency (e.g., ORNL). However, if you plan to have multiple installations of the software on different computers within your agency, the Installation ID should *uniquely* identify this specific installation. For example, you might enter the last name or initials of the person who is responsible for this specific computer (e.g., MPT). If left blank, a default installation ID consisting of the time you installed the Weatherization Assistant will be assigned. After entering the Installation ID, select the “Done” button. You will see a “splash screen” identifying the program name, version number, release date, and brief credits to the organizations that developed NEAT and MHEA. This screen will automatically disappear in several seconds after the Weatherization Assistant is fully opened. You will then be presented with the Weatherization Assistant’s Main Menu (see Fig. 2). You can change the Installation ID at any time by selecting the “Preferences” button on the Weatherization Assistant’s Main Menu. See Chapters 3.3 and 11.1 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details on the Installation ID.

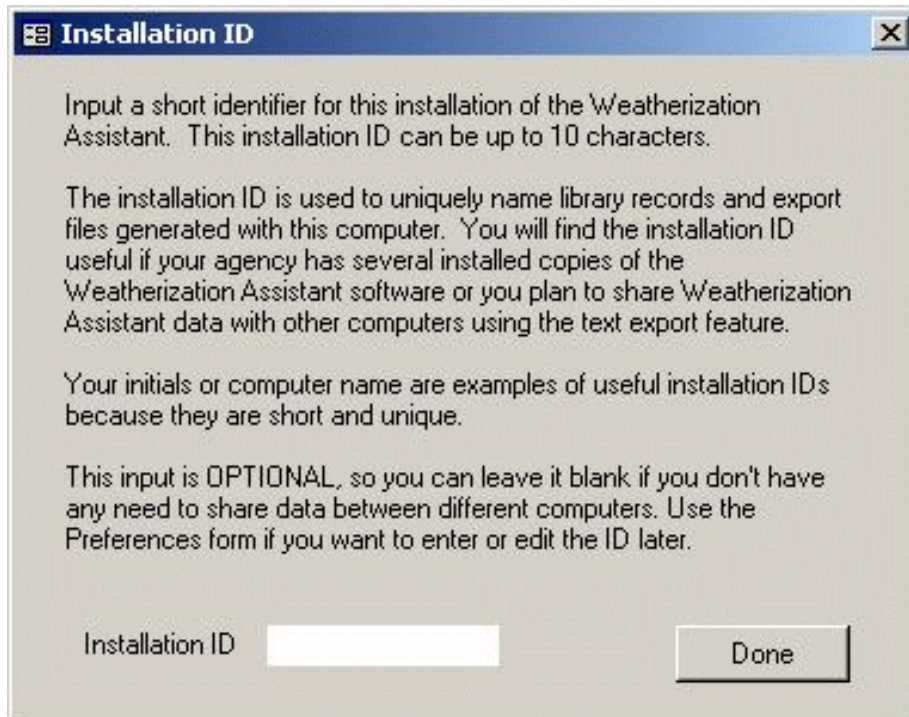


Figure 1. The Installation ID form

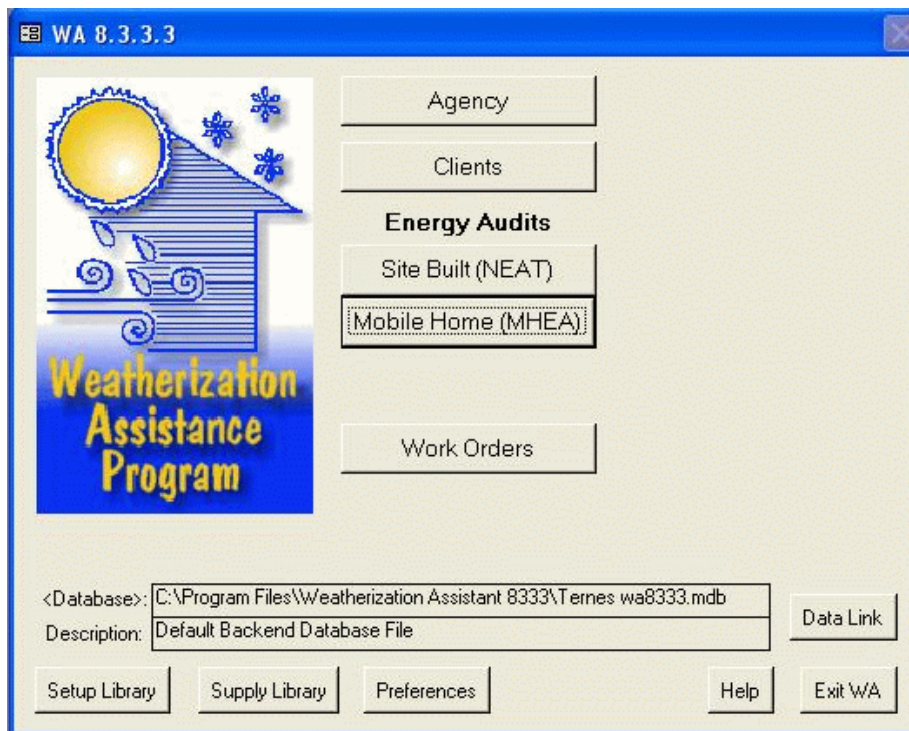


Figure 2. The Weatherization Assistant's Main Menu

## Initialize Your Agency Information

2. From the Weatherization Assistant’s Main Menu (see Fig. 2), select the “Agency” button to display the Agency Information form under the Agency Main Menu Item (see Fig. 3). Then do the following (see Chapter 5.1 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):
  - A. If the name shown in the Agency Name field is not “Your Agency Name”, use the combo box in the “Agency” record navigation block in the lower left corner of the Agency Information form to call up the agency with the name “Your Agency Name”.
  - B. Change the Agency Name from “Your Agency Name” to the actual name of your agency (the full name or perhaps an acronym). For example, Oak Ridge National Laboratory or ORNL. If there are multiple installations of the Weatherization Assistant on different computers within your agency, we recommend that you add a dash (“-”) after the agency name you entered followed by the Installation ID you entered in Step 1 (e.g., ORNL - MPT).
  - C. Change the State from “US” to your state using the combo box in the State field.
  - D. Although not absolutely necessary, we recommend that you change the Agency Type from “Other” to the type that best describes your agency using the combo box in the Agency Type field and delete the “Agency comment” from the Comment field.
  - E. Make sure the check box in front of “Default agency to associate with new Client, Work Order, ...” is checked.

The screenshot shows a software window titled "AGENCY -- AGENCY -- AGENCY -- AGENCY -- AGENCY -- AGENCY -- AGENCY -- AGENCY -- AGENCY -- AGENCY". The main form is titled "Agency Name" and contains the following fields and controls:

- Agency Name:** Text input field containing "Your Agency Name".
- State:** Dropdown menu set to "US".
- Agency Type:** Dropdown menu set to "Other".
- Federal Grant #:** Text input field.
- EIN:** Text input field.
- Other ID Num:** Text input field.
- Comment:** Text area containing "Agency comment".
- Address:** Text input field.
- City:** Text input field.
- State:** Dropdown menu.
- Zip Code:** Text input field.
- Phone Number:** Text input field.
- Fax Number:** Text input field.
- E Mail:** Text input field.
- Web Page URL:** Text input field.
- Checkboxes:** A checked checkbox with the text: "Default agency to associate with new Client, Work Order, Library, and Supply records. Checking this will automatically UNcheck this box for all other Agency records (ie. Only one Agency record can be the Default record)." and an unchecked checkbox.

At the bottom of the form, there are two main sections:

- AGENCY:** A navigation block with a dropdown menu "by Name", a list of 2 items, and buttons for "Copy" and "Del".
- REPORT:** A section with a "Select Report" dropdown menu, buttons for "Preview", "Print", and "Snapshot File", and a "Select Clients" button with "0 selected" below it.

Figure 3. The Agency Information form under the Agency Main Menu Item

3. While still under the Agency Main Menu Item, select the “Contacts” tab to display the Contacts form (see Fig. 4). Then do the following (see Chapter 5.2 of the “Weatherization Assistant Users Manual for Administrative Features” for more details):
  - A. If the name shown in the Contact Name field is not “Admin, Your”, use one of the combo boxes in the “Agency Contact” record navigation block in the lower left corner of the Contacts form to call up a contact with the name of “Admin, Your” with User Name “YADM”.
  - B. Change the Contact Name from “Admin, Your” to the actual name of a program administrator associated with your agency, change the User Name from “YADM” (we recommend using the person’s initials or their first or last name), and make sure the Active check box is checked.
  - C. A password of “Admin” (note the uppercase “A”) has already been assigned to the contact who replaced “Admin, Your” in Step 3B. If you want to use the Weatherization Assistant’s password feature to restrict who can open the software, you should change this password to a new one of your choice by selecting the “Change LogOn Group and Password” button, entering a new password, confirming the new password, confirming the old password of “Admin”, and then selecting the “Apply New Password” button (see Chapter 11.4 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details).
  - D. Call up a contact with the name of “Auditor, Your” with User Name “YAUD” using one of the combo boxes in the “Agency Contact” record navigation block in the lower left corner of the Contacts form.
  - E. Change the Contact Name from “Auditor, Your” to the actual name of an auditor associated with your agency, change the User Name from “YAUD” (we recommend using the auditor’s initials or their first or last name), and make sure the Active and Auditor check boxes are checked.

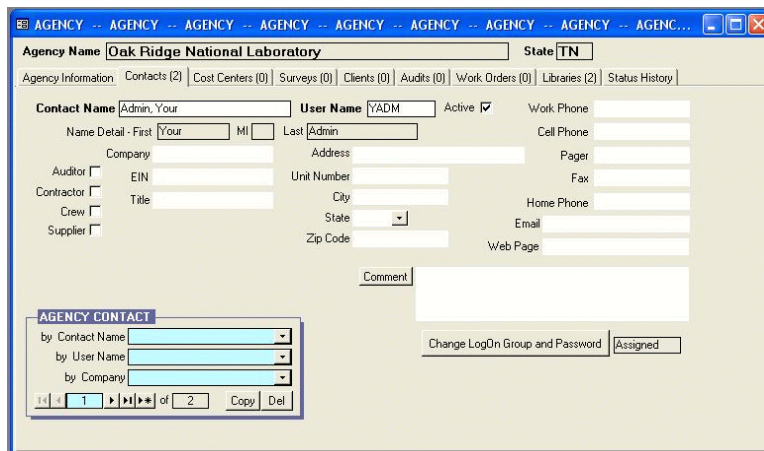


Figure 4. The Contacts form under the Agency Main Menu Item

4. Exit the Agency Main Menu Item using the X-box in the upper right corner of the Agency Main Menu Item to return to the Weatherization Assistant’s Main Menu. The correct X-box is on the same row as “AGENCY -- AGENCY -- AGENCY” in Fig. 4.



## Name Your Supply Library

5. From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Supply Library" button to display the General Information form under the Supply Library Main Menu Item (see Fig. 5). Then do the following (see Chapter 10.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):
  - A. If the name shown in the Supply Name field is not "Supply Library [Installation ID]", where the [Installation ID] is the Installation ID you entered in Step 1 (or a "time stamp" if you did not enter an Installation ID), use the combo box in the "Supply" record navigation block in the lower left corner of the General Information form to call up "Supply Library [Installation ID]".
  - B. Rename the Supply Name from "Supply Library [Installation ID]" to something more recognizable to you. We recommend that you enter the acronym of your agency in front of "Supply Library" (e.g., ORNL Supply Library). If you have more than one installation of the software within your agency, we recommend that you also retain the Installation ID in the name (e.g., ORNL Supply Library - MPT).
  - C. Make sure the name of your agency (as named in Step 2) is listed in the Agency field. If not, use the combo box in the Agency field to select your agency.

SUPPLY			
by Supply Name			
1	Supply	Agency	State
	Supply Library [Inst ID]	Your Agency Name	US

Figure 5. The General Information form under the Supply Library Main Menu Item

6. Exit the Supply Library Main Menu Item using the X-box in the upper right corner of the Supply Library Main Menu Item (the X-box on the same row as "SUPPLY -- SUPPLY -- SUPPLY" as shown in Fig. 5) to return to the Weatherization Assistant's Main Menu.

## Name Your Setup Library

7. From the Weatherization Assistant’s Main Menu (see Fig. 2), select the “Setup Library” button to display the Setup Library Information form under the Setup Library Main Menu Item (see Fig. 6). Then do the following (see Chapter 9.1 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):
  - A. If the name shown in the Library Name field is not “Setup Library [Installation ID], where the [Installation ID] is the Installation ID you entered in Step 1 (or a “time stamp” if you did not enter an Installation ID), use the combo box in the “Setup Library” record navigation block in the lower left corner of the Setup Library Information form to call up “Setup Library [Installation ID]”.
  - B. Rename the Library Name from “Setup Library [Installation ID]” to something more recognizable to you. We recommend that you enter the acronym of your agency in front of “Setup Library” (e.g., ORNL Setup Library). If you have more than one installation of the software within your agency, we recommend that you also retain the Installation ID in the name (e.g., ORNL Setup Library - MPT).
  - C. Make sure the name of your agency (as named in Step 2) is listed in the Agency field. If not, use the combo box in the Agency field to select your agency.
  - D. Assign the Supply Library you named in Step 5 to this Setup Library by selecting it using the combo box in the Supply Library field.

Library	Agency	State
Setup Library [Inst ID]	Your Agency Name	US

Figure 6. The Setup Library Information form under the Setup Library Main Menu Item

8. Exit the Setup Library Main Menu Item using the X-box in the upper right corner of the Supply Library Main Menu Item (the X-box on the same row as “SETUP LIBRARY -- SETUP LIBRARY -- SETUP LIBRARY” as shown in Fig. 6) to return to the Weatherization Assistant’s Main Menu.

## Populate the Supply and Setup Libraries

Before entering a client and running an audit, data specific to your agency must be entered into the Setup Library such as your actual fuel costs, your actual costs for installing measures, and identifying which measures your agency can perform. Information needs to be entered into the Supply Library only if you replace refrigerators or water heaters, or if you will be using detailed material information in the optional work order feature.

If this is your first use of the Weatherization Assistant, it may take up to a week to compile the required information and then a day to enter it into the Weatherization Assistant. If you used a previous version of the Weatherization Assistant, it may take less than a day for you to manually reenter the data from the previous version into Version 8.3, although now might be a good time to take an extra day to update the information. If you were previously using Version 8.2.7.8 of the Weatherization Assistant, you can easily print out all the measure costs you had entered in the Setup Library by selecting the “Setup Library” button from the Weatherization Assistant’s Main Menu (see Fig. 2) to display the Setup Library Information form under the Setup Library Main Menu Item (see Fig.6), choosing the Library Measure Costs report using the combo box in the “Report” block in the lower right corner of the Setup Library Information form (not shown in Fig. 6), and selecting the “Print” button in the “Report” block.

9. From the Weatherization Assistant’s Main Menu (see Fig. 2), select the “Setup Library” button to display the Setup Library Information form under the Setup Library Main Menu Item (see Fig. 6). Then do the following (see Chapter 9 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):
  - A. Ensure that the Library Name is the name of your setup library that you named and assigned to your agency in Step 7. If it isn’t, use the combo box in the “Setup Library” record navigation block in the lower left corner of the Setup Library Information form to call up your setup library.
  - B. Use the tabs shown on the Setup Library Main Menu Item to enter data specific to your agency. The “Fuel Costs” tab and the “Library Measures” tab with its associated costs and check boxes to select which measures your agency installs are of greatest importance. You may also look at the “Key Parameters” tab to see if any of these items need to be altered.
  - C. Exit the Setup Library Main Menu Item using the X-box in the upper right corner of the Setup Library Main Menu Item (the X-box on the same row as “SETUP LIBRARY -- SETUP LIBRARY -- SETUP LIBRARY” as shown in Fig. 6) to return to the Weatherization Assistant’s Main Menu.
  
10. From the Weatherization Assistant’s Main Menu (see Fig. 2), select the “Supply Library” button to display the General Information form under the Supply Library Main Menu Item (see Fig. 5). Then do the following (see Chapter 10 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):
  - A. Ensure that the Supply Name is the name of your supply library that you named and assigned to your agency in Step 5. If it isn’t, use the combo box in the “Supply” record navigation block in the lower left corner of the General

- Information form to call up your supply library.
- B. If you plan on replacing refrigerators or water heaters, enter the replacement models you will use by selecting the “Refrigerator” or “Hot Water Equipment” tabs (see Chapter 10.3 of “The Weatherization Assistant User Manual for Administrative Features” for additional details).
  - C. If you plan on using the Weatherization Assistant’s optional work order feature, you may want to populate the supply library with common materials using the tabs shown on the Supply Library Main Menu Item (e.g., Insulation, Lighting).
  - D. Exit the Supply Library Main Menu Item using the X-box in the upper right corner of the Supply Library Main Menu Item (the X-box on the same row as “SUPPLY -- SUPPLY -- SUPPLY” as shown in Fig. 5) to return to the Weatherization Assistant’s Main Menu.

## ALTERNATIVE SETUP METHOD FOR PREVIOUS USERS OF VERSION 8.2

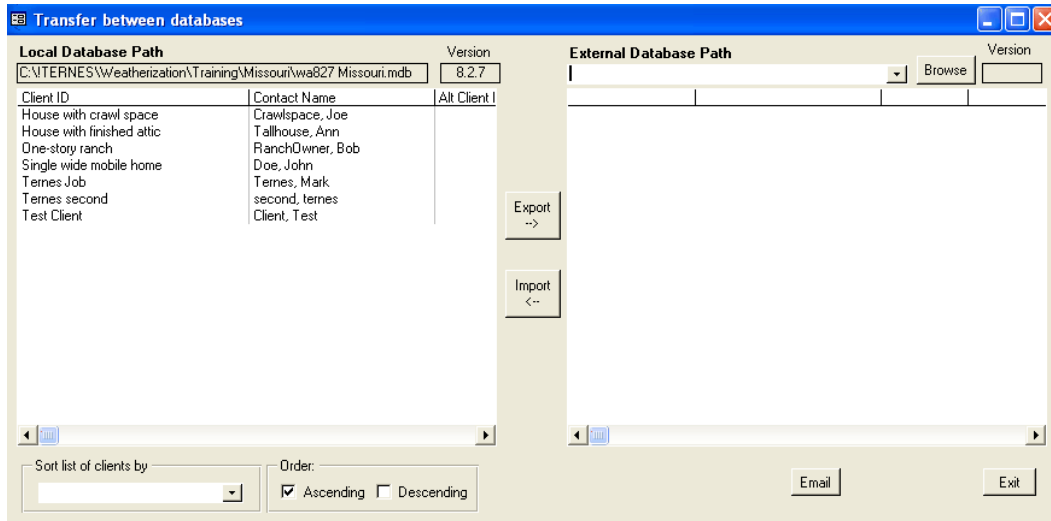
If you previously used Version 8.2 of the Weatherization Assistant, you can use this alternative setup method to import all your agency information, selected clients and their audits (if desired), and initial Setup and Supply Library information from Version 8.2 into Version 8.3.

11. Before starting Version 8.3 for the first time, start Version 8.2 to display the Weatherization Assistant’s Main Menu (see Fig. 2). Write down the path name of the database you are using as shown in the Database field. If the entire path name is not displayed (it will end with a “.mdb”), select the “Data Link” button to display the Data Link form (see Fig. 7). The same path name is shown in the Path field under “Currently Linked BACKEND DATA File.” You can click into this field and use your navigation buttons on your keyboard (right arrow key, etc.) to see the entire path name. Exit Version 8.2 of the Weatherization Assistant when you are done.

Figure 7. Data Link form

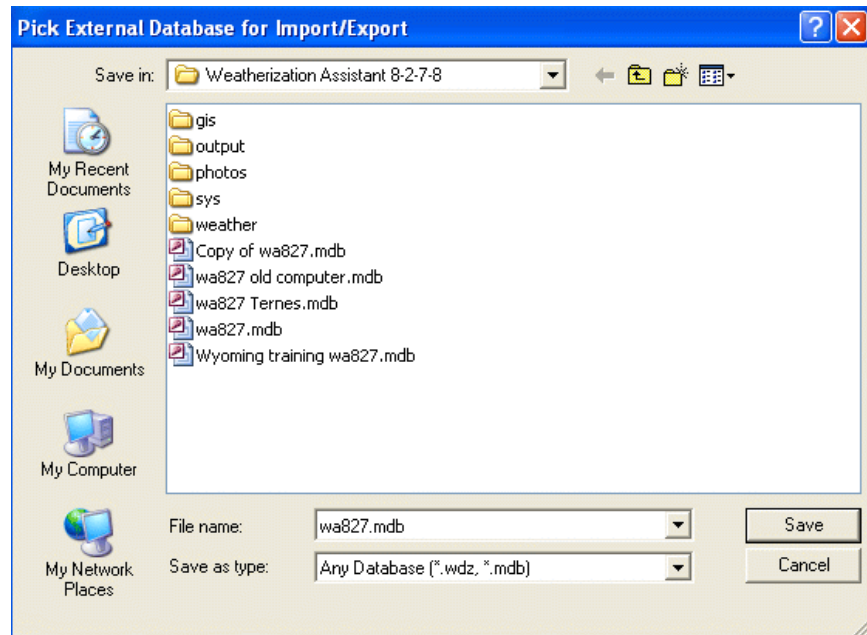


12. Start Version 8.3, and follow the same directions under Step 1 to enter the installation ID.
13. From the Weatherization Assistant’s Main Menu (see Fig. 2), do the following:
  - A. Select the “Data Link” button to display the Data Link form (see Fig. 7).
  - B. Select the “Import/Export via Database (mdb, wdz) Files (Version 7.4 Method)” button to display the “Transfer Between Databases” form (see Fig. 8).



**Figure 8. Transfer Between Databases form**

- C. Select the “Browse” button to display the “Pick External Database for Import/Export” form (see Fig. 9).



**Figure 9. Pick External Database for Import/Export form**

- D. Use the combo box in the Save In field and the main display to select the database that you were using in Version 8.2 (refer to the path name you wrote down in Step 11), and then select the “Save” button.
  - E. You are brought back to the “Transfer Between Databases” form (see Fig. 8), where the path name for the database you were using in Version 8.2 is displayed next to the “Browse” button and the clients entered in this database are shown in the display window under “External Database Path.”
  - F. If you want to transfer one or more of your clients from Version 8.2 to Version 8.3 to create a contiguous Version 8.3 database, highlight the clients to be transferred by clicking on their Client IDs (more than one client can be highlighted by holding down the Ctrl or Alt keys). If not, select just one of your clients so that agency and Setup and Supply Library information can be transferred (this client will be deleted from Version 8.3 in Step 15 once the transfer has occurred).
  - G. Once the clients have been highlighted, select the “Import <--“ button to start the data transfer process, which may take several minutes depending on how many clients you highlighted. When the data transfer process is completed, the hour glass will not be displayed and the clients that you transferred will be listed on the left side under “Local Database Path.”
  - H. Select the “Exit” button to close the “Transfer Between Databases” form and return you to the “Data Link” form, and select the “Exit” button again to close the “Data Link” form and return you to the Weatherization Assistant’s Main Menu.
14. From the Weatherization Assistant’s Main Menu (see Fig. 2), select the “Agency” button to display the Agency Information form under the Agency Main Menu Item (see Fig. 3). Then do the following:
- A. If the name shown in the Agency Name field is not the name of the agency that you used in Version 8.2, use the combo box in the “Agency” record navigation block in the lower left corner of the Agency Information form to call up the agency with the name that you were using.
  - B. Make sure the check box in front of “Default agency to associate with new Client, Work Order, ...” is checked.
  - C. Verify that the number in parentheses on the “Clients” tab is the number of clients that you wanted to transfer from Version 8.2.
  - D. Exit the Agency Main Menu Item using the X-box in the upper right corner of the Agency Main Menu Item to return to the Weatherization Assistant’s Main Menu. The correct X-box is on the same row as “AGENCY -- AGENCY -- AGENCY” as shown in Fig. 3.

15. If you transferred only one client so that the agency and Setup and Supply Library information could be transferred from Version 8.2 to Version 8.3 (see Step 13F), you should delete this client from the Version 8.3 database. Do this by:
  - A. From the Weatherization Assistant's Main Menu, select the "Clients" button to display the Client Information form under the Client Main Menu Item (see Fig. 10)
  - B. If the name shown in the Client ID field is not the client to be deleted, use one of the combo boxes in the "Client" record navigation block in the lower left corner of the Client Information form to call up the client to be deleted.
  - C. In the "Client" record navigation block in the lower left corner of the Client Information form, select the "Del" button and select "OK" when the warning box appears that says "This will cause CASCADING DELETES to occur in all tables associated with this Client record."
  - D. Exit the Client Main Menu Item using the X-box in the upper right corner of the Client Main Menu Item (the X-box on the same row as "CLIENT -- CLIENT -- CLIENT" as shown in Fig. 10) to return to the Weatherization Assistant's Main Menu.


Even though this alternative setup method imports your Version 8.2 Setup Library into Version 8.3, now might be a good time to update the information in the Setup Library, especially the installation costs that can be found under the "Library Measures" tab and the fuel costs that can be found under the "Fuel Costs" tab.

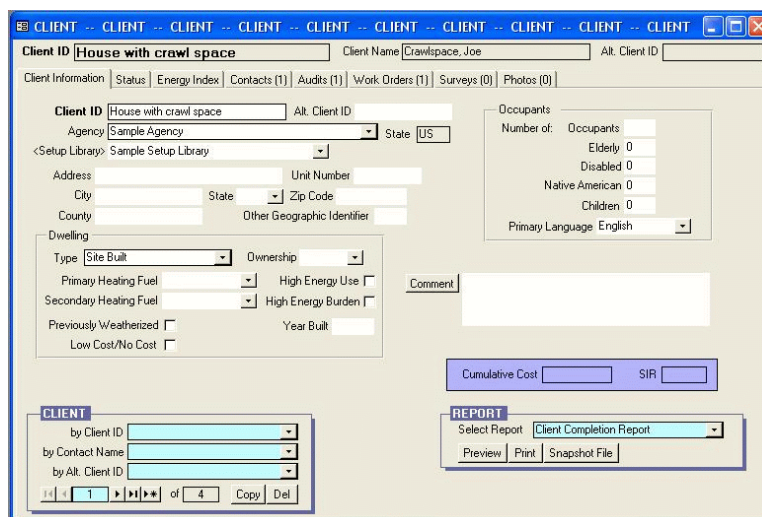
An upgrade from Version 8.2 to 8.3 signifies a change in the database structure (e.g., an added field). If, in Version 8.2, you had entered your own "User Defined Insulation Types" in the Setup Library for NEAT, the alternative setup method will not be able to transfer these insulation types and their associated costs into Version 8.3 because the formats are different. Therefore, you should enter these insulation types manually into Version 8.3 by selecting the "Setup Library" button from the Weatherization Assistant's Main Menu (see Fig. 2) and then selecting the "NEAT Insulation Types" tab. Once entered, you can enter the costs associated with these insulation types by selecting the "Library Measures" tab.

If you transferred one or more clients from Version 8.2 to 8.3 to form a contiguous Version 8.3 database, you must revisit the Foundation form for all NEAT audits and reenter/verify the information before running these audits under Version 8.3 because the fields on the Foundations form have changed.

## CREATE A CLIENT AND AUDIT

Before entering audit data for a client's home, you must first set up the client in the Weatherization Assistant and enter information related to the client.

16. From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Clients" button to display the Client Information form under the Client Main Menu Item (see Fig. 10). **Do not be alarmed that a previously defined client is displayed. Do not type over any information for an existing client.** Do the following (see Chapter 6.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):
  - A. Initiate a new client by clicking on the New BLANK Record button (  ) in the "Client" record navigation block in the lower left corner of the Client Information form. This will automatically start you off with a blank client form assigned to your agency.
  - B. Change the Client ID from the default ID the Weatherization Assistant created for this new client (e.g., "Client (xx)") to an ID your agency uses for the new client, normally a job number (e.g., ORNL 2007-001).
  - C. Make sure the name of your agency (as named in Step 2) is listed in the Agency field. If not, use the combo box in the Agency field to select your agency.
  - D. Assign the Setup Library that you named in Step 7 to this client using the combo box in the Setup Library field.
  - E. Select the correct Dwelling Type for the client using the combo box in the Dwelling Type field.
  - F. Although not absolutely necessary, we recommend that you enter the number of occupants in this house in the Number of Occupants field because NEAT and MHEA will use this value instead of a default value in their calculations.
  - G. Enter any other information you desire for your new client in the other fields on this form.



The screenshot shows a software window titled "CLIENT ... CLIENT ... CLIENT ... CLIENT ... CLIENT ... CLIENT ... CLIENT ... CLIENT ... CLIENT ... CLIENT ... CLIENT". The main form is "Client Information" for a client named "House with crawl space" (Client ID) and "Crawlspace, Joe" (Client Name). The form includes several sections: "Client Information" with fields for Client ID, Agency, Setup Library, Address, City, State, Zip Code, County, and Other Geographic Identifier; "Dwelling" with fields for Type, Ownership, Primary Heating Fuel, Secondary Heating Fuel, Previously Weatherized, Low Cost/No Cost, High Energy Use, and High Energy Burden; "Occupants" with fields for Number of Occupants, Elderly, Disabled, Native American, Children, and Primary Language; "Cumulative Cost" and "SIR" fields; and a "REPORT" section with a "Client Completion Report" selected. At the bottom, there is a "CLIENT" navigation block with dropdowns for Client ID, Contact Name, and Alt. Client ID, and a "REPORT" navigation block with buttons for Preview, Print, and Snapshot File.

Figure 10. The Client Information form under the Client Main Menu Item



17. While still under the Client Main Menu Item, select the “Contacts” tab to display the Contacts form (see Fig. 11). Then do the following (see Chapter 6.4 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):
  - A. Enter the client’s name in the Full Name field.
  - B. Check the “Primary Applicant” check box.
  - C. Ensure that the Contact Type is “Applicant/Person of Record”. If not, use the combo box in the Contact Type field to select “Applicant/Person of Record.”
  - D. Enter any other information you desire for the client using the fields on this form.

The screenshot shows a web-based form titled "CLIENT CONTACT" within a browser window. The window title bar reads "CLIENT -- CLIENT -- CLIENT -- CLIENT -- CLIENT -- CLIENT -- CLIENT -- CLIENT -- CLIENT". The form header includes "Client ID" (House with crawl space), "Client Name" (Crawspace, Joe), and "Alt. Client ID". Below the header are tabs for "Client Information", "Status", "Energy Index", "Contacts (1)", "Audits (1)", "Work Orders (1)", "Surveys (0)", and "Photos (0)". The main form area contains several input fields: "Full Name", "Name Detail - First", "MI", "Last", "Primary Applicant" (checked), "Contact Type" (Applicant/Person of Record), "Address", "Unit Number", "City", "State", "Zip Code", "Work Phone", "Cell Phone", "Pager", "Fax", "Home Phone", and "Email". A "Copy Client Addr" button is located near the address fields. At the bottom left, a "CLIENT CONTACT" list shows one contact with a "by Contact Name" dropdown and navigation buttons. A "Comment" field is located at the bottom right.

**Figure 11. The Contacts form under the Client Main Menu Item**

Now that you have set up the client in the Weatherization Assistant, you are ready to describe the client’s home in either of the audit programs (NEAT or MHEA), which will allow you to run the audit to develop a set of recommended energy measures. You may start a new audit from the Client Main Menu Item by following Step 18, or by returning to the Weatherization Assistant’s Main Menu and selecting either the “Site Built (NEAT)” or “Mobile Home (MHEA)” buttons as outlined in Step 19. The advantage of following Step 18 and starting the audit from the Client Main Menu Item is that the Client ID is entered automatically, which eliminates a common error.

18. While still under the Client Main Menu Item, select the “Audits” tab to display the Audits form (see Fig. 12), and then select either the “Create New Site Built (NEAT) Audit” or “Create New Mobile Home (MHEA) Audit” button depending on which audit is applicable for the client’s house. This brings you to the Audit Information form under the NEAT or MHEA Main Menu Item (see Fig. 13). The Client ID field will already be filled in, as will the Agency Name and Agency State fields using information entered for the selected client in Step 16. Then do the following (see Chapter 7.1 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):
- A. Change the Audit Name from the default name NEAT or MHEA created for this new audit (e.g., “Audit (xx)”) to a name conforming to the naming convention for clients and audits which you have developed. The new name may include some reference to the Client ID or client name, if you wish. For example, for a client named “Joe Crawlspace” with a Client ID of “ORNL 2007-001”, you might enter “Crawlspace Audit 1” or “ORNL 2007-001 Audit 1” as the Audit Name to signify that this is the first (and probably only) audit you are creating for this client.
  - B. Although not required, you may select the auditor to be assigned to this audit using the combo box in the Assigned To field. One such auditor was entered in Step 3.
  - C. Select the Setup, Fuel Cost, and Supply Libraries to be assigned to this audit using the combo boxes in the Setup Library, Fuel Cost Library, and Supply Library fields, respectively. The Supply and Setup Libraries will be those that you named in Steps 5 and 7, respectively, and populated with updated information in Steps 9 and 10. The Fuel Cost Library is a sub-library found in the Setup Library. You should have updated this library and possibly created more than one Fuel Cost Library as part of the process of updating and populating the Setup Library in Step 9.
  - D. Select a city close to the client that has similar weather to the client using the combo box in the Weather File field.
  - E. Enter audit data on the house in the remaining fields on the Audit Information form.
  - F. You may exit the NEAT or MHEA Main Menu Item (see Step 13H) and return later to enter remaining house audit data under other tabs on the NEAT or MHEA Main Menu Item (e.g., Shell, Heating, Cooling, Ducts/Infiltration, Baseloads, and Itemized Costs), or you can enter all house data now.
  - G. When you are finished entering the audit data, you can run the audit by selecting the “Run Audit” button found in the upper right corner of each form under the NEAT or MHEA Main Menu Item.
  - H. Exit the NEAT or MHEA Main Menu Item using the X-box in the upper right corner of the NEAT or MHEA Main Menu Item (the X-box on the same row as “NEAT AUDIT -- NEAT AUDIT -- NEAT AUDIT” as shown in Fig. 13 or equivalently for MHEA) to return to the Weatherization Assistant’s Main Menu.

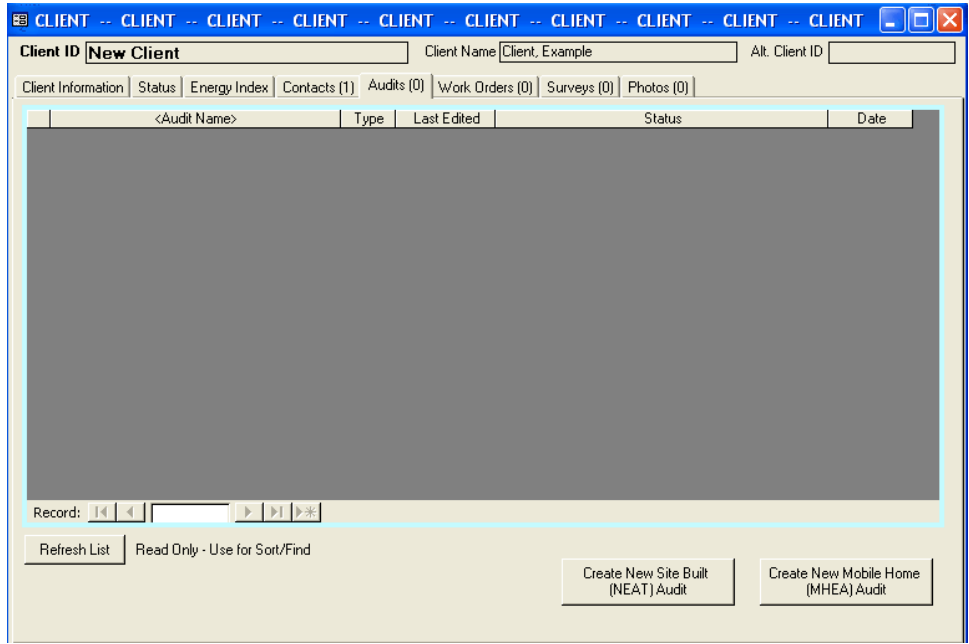


Figure 12. The Audits form under the Client Main Menu Item

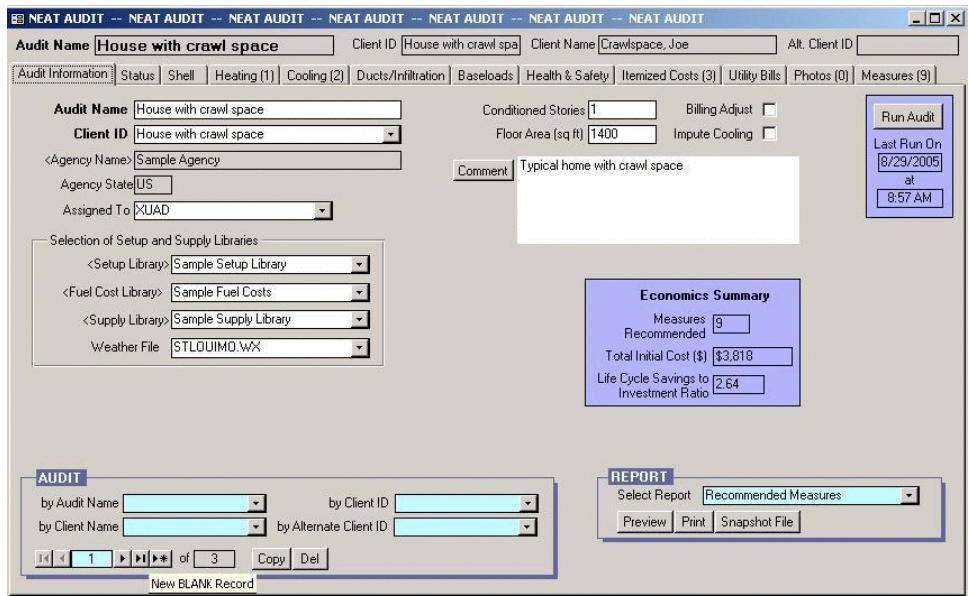



Figure 13. The Audit Information form under the NEAT Main Menu Item

19. Picking up from the end of Step 17, do the following (see Chapter 7.1 of the “Weatherization Assistant Users Manual for Administrative Features” for additional details):
- A. Exit the Client Main Menu Item using the X-box in the upper right corner of the Client Main Menu Item (the X-box on the same row as “CLIENT -- CLIENT -- CLIENT” as shown in Fig. 11) to return to the Weatherization Assistant’s Main Menu.
  - B. Select either the “Site Built (NEAT)” or “Mobile Home (MHEA)” buttons on the Weatherization Assistant’s Main Menu (see Fig. 2), depending on which audit is applicable for the client’s house, to display the Audit Information form under the NEAT or MHEA Main Menu Item (see Fig. 13). ***Do not be alarmed that a previously entered audit is displayed. Do not type over any information for an existing audit.***
  - C. Initiate a new audit by clicking on the New BLANK Record button () in the “Audit” record navigation block in the lower left corner of the Audit Information form. This will automatically start you off with a blank audit form.
  - D. Select the client for this audit using the combo box in the Client ID field. The client information must have been previously entered as outlined in Steps 16 and 17. Select “OK” if a warning box appears that says “This will assign the Audit to a new Client record.” The Agency Name and Agency State fields will be automatically filled in using information entered for the selected client in Step 16.
  - C. Continue with Steps 18A-H.