

Commerce

# Weatherization Information Data System

User Manual



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# Weatherization Information Data System

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## Introduction to WIDS

The Weatherization Information Data System (WIDS) is a database utilized by both Local Agencies and the Washington State Department of Commerce's (Commerce) Housing Improvements and Preservation Unit in order to report information regarding weatherization projects around the state. The Local Agencies use WIDS to provide data about and keep track of weatherization projects, while the state department uses WIDS to provide data regarding funding sources and demographics to many different governmental entities. The State Department also uses WIDS as a tool to help monitor the compliance of Local Agencies with regards to state and federal policies.

## How to Access the Weatherization Information Data System

In order to access WIDS, a member of a Local Agency or Commerce needs to be added to the Organization Details screen by a Security Administrator. Each Local Agency has at least one Security Administrator. If you need help determining who your agency's Security Administrator is, contact the WIDS help desk at [wids@commerce.wa.gov](mailto:wids@commerce.wa.gov).

After a new user is added to the Organization Details screen, the user needs to set up a Secure Access Washington (SAW) account. If the user already has a SAW account, they will need to add the Weatherization Information Data System to their My Services tab. Direction on how to create a SAW account, as well as how to add WIDS to a My Services tab can be found here: [SAW Setup Account](#).

Once a WIDS user has a SAW account, WIDS can be accessed through the SAW website by clicking on the Weatherization (WIDS) link under the My Services tab. If this is the first time accessing WIDS on a computer, or the first time accessing a new version of WIDS, the user may be asked to "run" the application. The user will need to allow access for the program to run in order to launch WIDS. (ADD instructions on how to access wids via our website, or some way other than through SAW, since SAW has the broken link. Isn't the link still broken? And if it is broken, then we need to revise this part so that we don't instruct them to access WIDS via the SAW link.



## The WIDS User Manual

This user manual explains how to add and update multiple types of weatherization projects in WIDS, as well as how to represent several different and important project stages in the database. This user manual provides instructions on how to access previously added projects, and how to add new, edit, and save Single Family and Multi-Family projects in WIDS. Any additional questions can be sent to the WIDS Help desk, or through the link provided in the Help drop-down at the top of the page. This link will open Outlook and auto-fill the To: field with the WIDS Help Desk E-mail. More information about Commerce and the Weatherization Program can also be found through clicking on the About Commerce link the Help drop-down. This link will open the Commerce Home Page.

**Weatherization Information Data System (QA.WX) - [Project Browse]**

File Window Help

Help  
About Commerce  
Contact WIDS Support

For questions regarding WIDS or the Department of Commerce, click on the Help drop-down menu.

Project Type	Status	Status Date	Agency	Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	10/26/2011	Commerce		98406			TEST	100-25230	
Single Family	Active	01/11/2011	Commerce	1 52	98406		angeli, meredith	123	100-25232	582-AZ86
Single Family	Closed	01/03/2011	Commerce	1 Test 123	98406		TESTING, TEST	Test123	100-25233	
Single Family	Pre-Audit	11/15/2011	Commerce	1 456 Candyland La...	59605			123D	100-25243	
Single Family	Pre-Audit	11/15/2011	Commerce	1 5468 Cottage Rd	98506		Queue, Susie	568D	100-25247	
Multi-Family	Closed	06/21/2011	Commerce	2 Seven Dwarves Ln	97654		White, Snow	856D	100-25259	
Single Family	Active	05/18/2011	Commerce	1 Hollywood Blvd	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	07/20/2011	Commerce	1 4876 Chester Cat ...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011	Commerce	2 137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce	1 137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Commerce	1 111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Commerce	1 542 Commerce Ave	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Commerce	3 456 Sesame St.	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2 456 Sesame St.	98406			962	100-25287	
Single Family	Active	11/15/2011	Commerce	1 123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	2 411 N. Evergreen	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce	1 555 Orange St	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2 555 Orange St	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1 616 N. Anderson St.	98406		Smith, Susan	565	100-25290	
Single Family	Active	12/04/2011	Commerce	1 320 N. Market St.	98532		Dole, Bob	678	100-25293	

Totals 20 records



# Project Browse Screen

## Introduction to the Project Browse Screen

After opening WIDS, the first screen is the Project Browse screen. If the user navigated away from this screen, the Project Browse screen also can be accessed through the Project drop-down menu at the top of the page. Additionally, the screen currently being viewed will be named at the top of each screen. For example, the Project Browse screen will have the label, “Weatherization Information Data System (PROD.WX) – [Project Browse]” at the top of the screen (However, the example pictures in this user manual will have a slightly modified label compared to the labels at the top of the screen for the production version of WIDS used by Local Agencies. In this user manual, the label at the top of the screen will read, “Weatherization Information Data System (QA.WX) – [Project Browse].” This difference is caused by using a test version of WIDS, instead of the production version of WIDS, in order to protect confidential information.

Project Type	Status	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	2	TESTing	98406			TEST	100-25230	
Single Family	Active	1	52	98406		angeli, meredith	123	100-25232	582-AZ86
Single Family	Closed	1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Single Family	Pre-Audit	1	456 Candyland La...	59605			123D	100-25243	
Single Family	Pre-Audit	1	5468 Cottage Rd	98506		Queue, Susie	568D	100-25247	
Multi-Family	Closed	2	Seven Dwarves Ln	97654		White, Snow	856D	100-25259	
Single Family	Active	1	Hollywood Blvd	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	1	4876 Chester Cat ...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	1	111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	1	542 Commerce Ave	85602			885	100-25286	
Multi-Family	Pre-Audit	1	456 Sesame St.	98406			962	100-25287	
Multi-Family	Pre-Audit	3	456 Sesame St.	98406			962	100-25287	
Single Family	Active	1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	2	411 N. Evergreen	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	1	555 Orange St	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	1	555 Orange St	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290	
Single Family	Active	1	320 N. Market St.	98532		Dole, Bob	678	100-25293	

Totals: 20 records



# Department of Commerce

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Project Browse displays a catalogue of the Local Agency's saved records. Whenever a record is saved, it is catalogued here. Use the Project Browse screen to find and select a specific project. Use the columns headers to sort or filter the list of projects.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

These are the different fields by which a user can sort the list of projects.

Project Type	Status	Status Date	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230	
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyl...	59605			123D	100-25243	
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cotta...	98506		Queue, Susie	568D	100-25247	
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dw...	97654		White, Snow	856D	100-25259	
Single Family	Active	05/18/2011	Commerce		1	Hollywood ...	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	07/20/2011	Commerce		1	4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Commerce		1	111 White...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Comm...	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Seasa...	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Drang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Drang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. And...	98406		Smith, Susan	565	100-25290	

These are the saved project records.

Totals 19 records



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Use the buttons at the top right of the catalogue to refresh the page, clear filters, or open a selected entry for edit. Refresh the page after a filter is cleared to see the entire list of projects, or refresh the page after entering information into one of the filtering fields. Additionally, refreshing the page can be achieved by hitting the Enter key on the keyboard after typing into a filtering field.

The screenshot shows a web application window titled "Weatherization Information Data System (QA.WX) - [Project Browse]". The window has a menu bar with "File", "Window", and "Help". Below the menu bar are navigation tabs for "Project", "Reports", and "Maintenance". The main content area displays a table with 13 columns: Project Type, Status, Status Date, Agency, Building#, # of Units, Building, Building Zip, Occupant, Owner Name, Agy Project#, COM Project#, and Parcel#. The table contains 19 records. In the top right corner of the table area, there are three buttons: a refresh button (circular arrow), a clear button (X), and an edit button (pencil). A red arrow points to these buttons, and a callout box contains the text: "These buttons are used to refresh the screen, clear the field, or open a saved project." At the bottom left of the window, it says "Totals: 19 records".

Project Type	Status	Status Date	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230	
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyl...	59605			123D	100-25243	
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cotta...	98506		Queue, Susie	568D	100-25247	
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dw...	97654		White, Snow	856D	100-25259	
Single Family	Active	05/18/2011	Commerce		1	Hollywood ...	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	07/20/2011	Commerce		1	4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Commerce		1	111 White...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Comm...	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Seasa...	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. And...	98406		Smith, Susan	565	100-25290	



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Next to the refresh, clear, and edit buttons at the top right of the page, there is a small drop-down button. This button allows a user to either copy the currently displayed grid to the computer Clip Board in order to paste the grid into a document or to print the grid using the computer's default printer setting.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230	
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candy...	59605			123D	100-25243	
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cotta...	98506		Queue, Susie	568D	100-25247	
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dw...	97654		White, Snow	856D	100-25259	
Single Family	Active	05/18/2011	Commerce		1	Hollywood ...	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	07/20/2011	Commerce		1	4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Commerce		1	111 White...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Comm...	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Seasa...	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. And...	98406		Smith, Susan	565	100-25290	

Totals 19 records

Copy Grid  
Print Grid

Use the drop-down button to copy the project catalogue grid or print the grid.



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Additionally, right-clicking the displayed grid will also bring up a pop-up that displays the same options as the buttons above the catalogue: Clear Filter, Refresh, Edit, Copy Grid, and Print Grid.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230	
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candy...	59605			123D	100-25243	
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cotta...	98506		Queue , Susie	568D	100-25247	
Multi-Family	Closed	06/21/2011	Commerce		2	Seven Dw...	97654		White, Snow	856D	100-25259	
Single Family	Active	05/18/2011	Commerce		1	Hollywood ...	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	07/20/2011	Commerce		1	4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011	Commerce		2	13...	98500		Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce		2	13...	98500		Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Commerce		1	11...	98500		Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Commerce		1	54...	98500			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Commerce		1	45...	98500			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce		2	456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce		2	411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce		1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce		2	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce		1	616 N. And...	98406		Smith, Susan	565	100-25290	

Totals 19 records



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There are a set of buttons at the very top of the screen, next to the Project drop-down menu. These buttons are as follows: New, Edit, Delete, Save, and Refresh. However, not all of these buttons are available on the Project Browse screen. On the Project Browse Screen, the following options are available: Edit (which opens an existing project so that a user can edit the details of that project), Save, and Refresh. The New (which creates a new project of the same type) and Delete (which deletes the information in a highlighted field) are available under an open project.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Use these buttons to create a new project, edit an existing project, delete a field, save a project, and refresh the screen.

Project Type	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family		2	2	TESTing	98406			TEST	100-25230	
Single Family			1	52	98406		angeli, meredith	123	100-25232	
Single Family	Closed	01/03/2011		1 Test 123	98406		TESTING, TEST	Test123	100-25233	
Single Family	Pre-Audit	11/15/2011		1 456 Candyl...	59605			123D	100-25243	
Single Family	Pre-Audit	11/15/2011		1 5468 Cotta...	98506		Queue, Susie	568D	100-25247	
Multi-Family	Closed	06/21/2011		2 Seven Dw...	97654		White, Snow	856D	100-25259	
Single Family	Active	05/18/2011		1 Hollywood ...	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	07/20/2011		1 4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011		2 137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011		2 137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011		1 111 White...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011		1 542 Comm...	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011		3 456 Seasa...	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011		3 456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011		1 123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011		2 411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011		1 555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011		1 555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011		1 616 N. And...	98406		Smith, Susan	565	100-25290	

Totals 19 records



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On the Project Browse screen, there are several different fields to use to sort projects. Some of these fields allow information to be typed directly into the field and other fields are drop-down menus that allow selecting from a few options. Data can be entered into all, some, or none of these fields at a time. The types of fields displayed on the Project Browse screen will be discussed below.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	10/26/2011	Commerce							TEST	100-25230	
Single Family	Active	01/11/2011	Commerce					angeli, meredith		123	100-25232	
Single Family	Closed	01/03/2011	Commerce					TESTING, TEST		Test123	100-25233	
Single Family	Pre-Audit	11/15/2011	Commerce							123D	100-25243	
Single Family	Pre-Audit	11/15/2011	Commerce					Queue, Susie		568D	100-25247	
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dw...	97654		White, Snow	856D	100-25259	
Single Family	Active	05/18/2011	Commerce		1	Hollywood ...	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	07/20/2011	Commerce		1	4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011	Commerce	2		137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Commerce		1	111 White...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Comm...	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Seasa...	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2		456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. And...	98406		Smith, Susan	565	100-25290	

Use these fields to sort existing projects. Some of these fields are drop-down menus that allow the user to choose from a pre-populated list and some of these fields are typeable.

Totals 19 records



## Drop-down Menus

Three fields on the Project Browse screen use drop-down menus: *Project Type*, *Status*, and *Agency*. Each of these drop-down menus contains a list of terms to search for a specific project record.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
			Commerce									
				2	2	TESTing	98406			TEST	100-25230	
					1	52	98406		angeli, meredith	123	100-25232	
					1	Test 123	98406		TESTING, TEST	Test123	100-25233	
					1	456 Candyl...	59605			123D	100-25243	
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cotta...	98506		Queue, Susie	568D	100-25247	
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dw...	97654		White, Snow	856D	100-25259	
Single Family	Active	05/18/2011	Commerce		1	Hollywood ...	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	07/20/2011	Commerce		1	4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Commerce		1	111 White...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Comm...	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Seasa...	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Drang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Drang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. And...	98406		Smith, Susan	565	100-25290	

Totals 19 records



## Project Type

In the *Project Type* drop-down menu, a user can filter by Single Family projects or Multi-Family projects.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	11		Commerce	2	2	TESTing	98406			TEST	100-25230	
Single Family	11		Commerce		1	52	98406		angeli, meredith	123	100-25232	
Single Family					1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Single Family					1	456 Candy...	59605			123D	100-25243	
Single Family					1	5468 Cotta...	98506		Queue, Susie	568D	100-25247	
Multi-Family				1	2	Seven Dw...	97654		White, Snow	856D	100-25259	
Single Family					1	Hollywood ...	99652		Dylan, Bob	657	100-25263	
Single Family	Completed	07/20/2011	Commerce		1	4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Commerce		1	111 White...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Comm...	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Seasa...	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. And...	98406		Smith, Susan	565	100-25290	

Totals: 19 records



## Status

The *Status* drop-down menu provides a list of options by which to filter project records. One can filter by status to find projects that are saved in a specific status category. The options for the *Status* drop-down are **Active**, **Closed**, **Completed**, **Permanently Deferred**, **Postponed**, and **Pre-Audit**.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Active		Commerce	2	2	TESTing	98406			TEST	100-25230	
Single Family	Closed		Commerce		1	52	98406		angeli, meredith	123	100-25232	
Single Family	Completed		Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Single Family	Permanently Deferred		Commerce		1	456 Candy...	59605			123D	100-25243	
Single Family	Postponed		Commerce		1	5468 Cotta...	98506		Queue, Susie	568D	100-25247	
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cotta...	98506		Queue, Susie	568D	100-25247	
Multi-Family			Commerce	1	2	Seven Dw...	97654		White, Snow	856D	100-25259	
Single Family			Commerce		1	Hollywood ...	99652		Dylan, Bob	657	100-25263	
Single Family			Commerce		1	4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family			Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Commerce		1	111 White...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Comm...	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Seasa...	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. And...	98406		Smith, Susan	565	100-25290	

Totals: 19 records



## Agency

The *Agency* drop-down menu allows a user from an agency to see only the records created by that specific agency. However, the *Agency* drop-down will allow Commerce to sort through records from all agencies by choosing a specific agency from the drop-down.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	10/26/2011	Commerce		2	TESTing	98406			TEST	100-25230	
Single Family	Active	01/11/2011	Commerce		1				meredith	123	100-25232	
Single Family	Closed	01/03/2011	Farm Workers		1				NG. TEST	Test123	100-25233	
Single Family	Pre-Audit	11/15/2011	HopeSource		1					123D	100-25243	
Single Family	Pre-Audit	11/15/2011	KCHA		1				Susie	568D	100-25247	
Multi-Family	Closed	06/21/2011	KCR		2				Snow	856D	100-25259	
Single Family	Active	05/18/2011	Lower Columbia		1				Bob	657	100-25263	
Single Family	Completed	07/20/2011	Makah		1	4876 Chest...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Active	08/25/2011	MDC		2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	DIC	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Permane...	06/05/2011	Okanogan		1	111 White...	85723	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit	11/17/2011	Oly CAP		1	542 Comm...	85602			885	100-25286	
Multi-Family	Pre-Audit	11/17/2011	Ppp Co	1	3	456 Seasa...	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Pierce	2	3	456 Seasa...	98406			962	100-25287	
Single Family	Active	11/15/2011	Rural Resources		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Eve...	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orang...	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. And...	98406		Smith, Susan	565	100-25290	

Totals 19 records



## Partial Search Fields

The following fields are partial search fields on the Project Browse screen: *Building#*, *# of Units*, *Building Address*, *Occupant*, *Owner Name*, *Agy Project#*, *COM Project#*, and *Parcel#*. A partial search field allows a user to enter any part of the information displayed in a field. The results of a partial search will display all of the projects that include the partial data in that particular field.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven					100-25259	
Single Family	Active	05/18/2011	Commerce		1	Hollyw					100-25263	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N.					100-25290	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orange St	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orange St	98504		Gecko, Sobe	888	100-25289	
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cottage Rd	98506		Queue, Susie	568D	100-25247	
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Commerce Ave	85602			885	100-25286	
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	
Single Family	Completed	07/20/2011	Commerce		1	4876 Chester Cat ...	56872		Wonderland, Alice	1052	100-25277	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Sesame St.	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Sesame St.	98406			962	100-25287	
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyland La...	59605			123D	100-25243	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Evergreen	98406		Smolov, Dan	555	100-25288	
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Single Family	Permane...	06/05/2011	Commerce		1	111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285	

Totals: 19 records



## Building#, # of Units, and Building Address

These three partial search fields allow a user to enter any part of a building number, any part of a building address, or any number of units in order to search for a specific project. The Project Browse screen lists projects by building. This means that if a project contains multiple buildings, each of those buildings will be displayed on the Project Browse.

The screenshot shows a web application window titled "Weatherization Information Data System (QA.WX) - [Project Browse]". The window has a menu bar with "File", "Window", and "Help". Below the menu bar is a toolbar with icons for "Project", "Reports", and "Maintenance". The main content area displays a table with the following columns: Project Type, Status, Status Date, Agency, Building#, # of Units, Building Address, Building Zip, Occupant, Owner Name, Agy Project#, COM Project#, and Parcel#. The "Building#", "# of Units", and "Building Address" columns are highlighted with a red border. The "Building#" column contains the value "1", the "# of Units" column contains "1", and the "Building Address" column contains "And". The table also contains one data row: Multi-Family, Closed, 11/25/2011, Commerce, 1, 1, 616 N. Anderson St., 98406, Smith, Susan, 565, 100-25290. A tooltip box is overlaid on the table with the text: "These fields can be used in order to find a specific project in the WIDS database." At the bottom left of the window, it says "Totals: 1 record".

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290	

Totals: 1 record



## Occupant and Owner Name

These partial search fields on the Project Browse screen allow a user to enter any part of a building occupant or owner name. A user can use any combination of letters for these two fields. Entering a part or a whole name into either of these fields will display all of the records where the occupant or owner's name matches the desired search criteria.

The screenshot shows the 'Weatherization Information Data System (QA.WX) - [Project Browse]' interface. It features a menu bar with 'File', 'Window', and 'Help'. Below the menu is a toolbar with icons for 'Project', 'Reports', and 'Maintenance'. The main area contains a table with the following columns: Project Type, Status, Status Date, Agency, Building#, # of Units, Building Address, Building Zip, Occupant, Owner Name, Agcy Project#, COM Project#, and Parcel#. The 'Occupant' and 'Owner Name' columns are highlighted with a red box. A tooltip is displayed over these columns, stating: 'Occupant and Owner Name are partial search fields that can be used to find a specific project in WIDS.' The table contains one data row: Single Family, Perman..., 06/05/2011, Commerce, 1, 111 Whitehouse A..., 85723, Barack Obama, Obama, Michelle, 556, 100-25285, and an empty Parcel# field. At the bottom left, it says 'Totals 1 record'.

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agcy Project#	COM Project#	Parcel#
Single Family	Permane...	06/05/2011	Commerce	1	1	111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285	

Totals 1 record



## Agy Project#

The Agency Project Number is an alphanumeric identification number that a local agency assigns to each project record when creating and saving a record. An agency can use any combination of letters and/or numbers. Each agency has its own system for choosing the Agency Project Number. The Agency Project Number is also known as the “unique identifier.” Originally, the Agency Project Number was used on the Weekly ARRA Production Report. Entering a part or a whole Agency Project Number into this field will display all of the records that match the search criteria.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyland La...	99605			3		
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, merced			
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, T...			

Totals 3 records



## COM Project#

The Commerce Project Number is a number assigned to a project by the WIDS application. This number is assigned to a project upon the initial project save. The first three digits in this identification number are the Local Agency's Identification Number. The digits in the Commerce Project Number are chosen by the application. Entering a part or a whole Commerce Project Number into this field will display all of the records that match the search criteria.

Weatherization Information Data System (QA.WX) - [Project Browse]

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406		TEST	TEST	100-25230	

Totals 3 records

Use the Commerce project number to find a specific project.



## Parcel#

A Property Parcel Number, also called an Assessor's Parcel Number, is a unique identification number assigned to parcels of real property by the tax assessor of a particular jurisdiction for purposes of identification and record-keeping. Entering a part or a whole Property Parcel Number into this field will display all of the records that match the search criteria.

The screenshot shows a web application window titled "Weatherization Information Data System (QA.WX) - [Project Browse]". The interface includes a menu bar with "File", "Window", and "Help", and a toolbar with "Project", "Reports", and "Maintenance" options. A table displays project information with the following columns: Project Type, Status, Status Date, Agency, Building#, # of Units, Building Address, Building Zip, Occupant, Owner Name, Agy Project#, COM Project#, and Parcel#. The first row of data shows a "Single Family" project, "Active" status, "01/11/2011" status date, "Commerce" agency, "52" units, "98406" zip, and "angeli, meredith" owner. The "Parcel#" field in the first row is highlighted with a red box and contains the value "582". A callout box with a white background and black border is positioned over the table, containing the text: "Use the *Parcel#* field to find a specific project in the WIDS database." At the bottom left of the window, it says "Totals 1 record".

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	582-AZ86

Totals 1 record



## Exact Search Fields

The following fields are exact search fields on the Project Browse page: *Building Zip* and *Status Date*.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Single Family	Permane...	06/05/2011	Commerce		1	111 Whitehouse A...	98406	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	08/25/2011	Commerce	2	2	127 Mark Rd	98602		Turing, Alan	9965	100-25278	
Multi-Family	Active	08/25/2011	Commerce				98602		Turing, Alan	9965	100-25278	
Multi-Family	Active	11/15/2011	Commerce			green	98406		Smolov, Dan	555	100-25288	
Single Family	Pre-Audit	11/15/2011	Commerce			nd La...	59605			123D	100-25243	
Multi-Family	Pre-Audit	11/17/2011	Commerce			ve St.	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce			ve St.	98406			962	100-25287	
Single Family	Completed	07/20/2011	Commerce		1	4876 Chester Cat ...	56872		Wonderland, Alice	1052	100-25277	
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	582-AZ86
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Commerce Ave	85602			885	100-25286	
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cottage Rd	98506		Queue, Susie	568D	100-25247	
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orange St	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orange St	98504		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290	
Single Family	Active	05/18/2011	Commerce		1	Hollywood Blvd	99652		Dylan, Bob	657	100-25263	
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dwarves Ln	97654		White, Snow	856D	100-25259	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406		TEST	TEST	100-25230	

Totals 19 records



# Department of Commerce

Innovation is in our nature.

## Building Zip

The Building Zip Code field is not a partial search field. Enter the entire 5-digit zip code in order to search for a project using this field. Entering a 5-digit zip code into this field will display all records sharing that zip code.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Evergreen	98406		Smolov, Dan	555	100-25288	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Sesame St.	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Sesame St.	98406			962	100-25287	
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	582-AZ86
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233	
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230	

The *Building Zip* field can be used to find a specific project or all the projects in a specific zipcode.

Totals: 8 records



## Status Date

The *Status Date* field is not a partial search field. The Status Date is the date that the project last changed statuses. Enter the entire date in mm/dd/yyyy format. Enter just the month and day in mm/dd format, and the search will auto-fill with the current year. Entering a date into this field will display all records sharing the search date.

The screenshot shows a web application window titled "Weatherization Information Data System (QA.WX) - [Project Browse]". The window has a menu bar with "File", "Window", and "Help". Below the menu bar is a toolbar with icons for "Project", "Reports", and "Maintenance". The main content area displays a table with the following columns: Project Type, Status, Status Date, Agency, Building#, # of Units, Building Address, Building Zip, Occupant, Owner Name, Agy Project#, COM Project#, and Parcel#. The table contains three rows of data, all with a Status Date of 11/17/2011. A callout box points to the Status Date field in the first row, stating: "Entering a date into the Status Date field will display the projects that changed status on that day." At the bottom left of the window, it says "Totals 3 records".

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Sesame St.	98406			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Sesame St.	98406			962	100-25287	
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Commerce Ave	85602			885	100-25286	

Entering a date into the Status Date field will display the projects that changed status on that day.

Totals 3 records



# Single Family Project

## Introduction to Starting a New Single Family Project

The option to start a new Single Family Project can be found under the Project drop-down at the top of the screen. The project will open in a new window.

Project Type	Status				Occupant	Owner Name	Agy Project#	COM Project#	Parcel#
Single Family	Permane...								
Single Family	Active				Barack Obama	Obama, Michelle	556	100-25285	
Multi-Family	Active					Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active					Turing, Alan	9965	100-25278	
Multi-Family	Active					Turing, Alan	9965	100-25278	
Multi-Family	Active	11/15/2011	Commerce	1		Smolov, Dan	555	100-25288	
Single Family	Pre-Audit	11/15/2011	Commerce	1			123D	100-25243	
Multi-Family	Pre-Audit	11/17/2011	Commerce	1			962	100-25287	
Multi-Family	Pre-Audit	11/17/2011	Commerce	2			962	100-25287	
Single Family	Completed	07/20/2011	Commerce	1		Wonderland, Alice	1052	100-25277	
Single Family	Active	01/11/2011	Commerce	1		angeli, meredith	123	100-25232	582-AZ86
Single Family	Pre-Audit	11/17/2011	Commerce	1			885	100-25286	
Single Family	Pre-Audit	11/15/2011	Commerce	1		Queue, Susie	568D	100-25247	
Multi-Family	Active	11/15/2011	Commerce	1		Gecko, Sobe	888	100-25289	
Multi-Family	Active	11/15/2011	Commerce	2		Gecko, Sobe	888	100-25289	
Multi-Family	Closed	11/25/2011	Commerce	1		Smith, Susan	565	100-25290	
Single Family	Active	05/18/2011	Commerce	1		Dylan, Bob	657	100-25263	
Multi-Family	Closed	06/21/2011	Commerce	1		White, Snow	856D	100-25259	
Single Family	Closed	01/03/2011	Commerce	1		TESTING, TEST	Test123	100-25233	
Multi-Family	Pre-Audit	10/26/2011	Commerce	2			TEST	100-25230	

Totals: 19 records



Navigate among multiple open windows (such as the Project Browse screen and the new Single Family Project) by utilizing the Window drop-down at the top of the screen.

Clicking on "Window" allows the user an easy way to switch back and forth between pages in WIDS.

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appli...	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
Construction Fun...	<input type="checkbox"/> HFC
	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
Meter Type	<input type="checkbox"/> None
	<input type="checkbox"/> Master Metered
	<input type="checkbox"/> Individual Metered
Previously Weath...	<input type="checkbox"/> Yes
	<input type="checkbox"/> No



# Department of Commerce

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In a Single Family Project, the first tab is labeled *Project Details*. Each project contains nine tabs. These tabs are: *Project Details*, *Contacts*, *Measures*, *Milestone/Status*, *Demographics*, *Costs*, *Audit*, *Validation*, and *Attachments*. Each of these tabs contains both required and optional fields (except the *Attachments* tab – which is entirely optional). However, to initially save a project, only one tab requires information.

Category		Characteristic
Housing Status	<input type="checkbox"/>	Rental
	<input type="checkbox"/>	Owner Occupied
	<input type="checkbox"/>	Shelter
Combustion Appli...	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No
Other	<input type="checkbox"/>	Knob and Tube
	<input type="checkbox"/>	Historic Site
	<input type="checkbox"/>	Lead Safe Practi...
Construction Fun...	<input type="checkbox"/>	HFC
	<input type="checkbox"/>	HTF
	<input type="checkbox"/>	HUD
	<input type="checkbox"/>	USDA
	<input type="checkbox"/>	None
Meter Type	<input type="checkbox"/>	Master Metered
	<input type="checkbox"/>	Individual Metered
Previously Weath...	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No



## Saving a New Single Family Project in the Pre-Audit Status

In order to successfully save a Single Family Project, some basic information must be entered into WIDS. The fields required to initially save a project are highlighted in yellow on the *Project Details* tab. Other fields in the application are required as Milestone Dates are entered on the *Milestone/Status* tab. One can save a project in **Pre-Audit** status after entering data into the yellow highlighted fields .

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: ]

File Window Help

Project - Reports - Maintenance -

Project Details | Contacts | Measures | Milestone/Status | Demographics | Costs | Audit | Validation | Attachments

### Project Detail

Local Agency: 100 - Commerce  
Project Status:   
CDM Project#:   
Status Date:   
**Agency Project#: 1**  
Last Updated By:   
Is ARRA?:   
Last Updated Date:   
Electricity Utility:

### Building Detail

**Building Type**  Parcel#:   
**Street Address**   
**City/State/Zip**  WA  +4   
Primary Heat/Utility:   
Secondary Heat/Utility:   
Year Built:  Year Previously Weatherized:   
**# of Units in Building: 1** Conditioned SQFT:   
Annual Heating Cost:  Total Energy Cost:   
Description:

### Building Characteristics

Other Characteristics

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appli...	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	
Constru	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
	<input type="checkbox"/> None
Meter Type	<input type="checkbox"/> Master Metered
	<input type="checkbox"/> Individual Metered
Previously Weath...	<input type="checkbox"/> Yes
	<input type="checkbox"/> No

The fields that are highlighted in yellow are the fields that are required to save a project in the **Pre-Audit** status.

### Project Notes



## Milestone/Status tab

In order to move a project from one status to the next, a required date needs to be entered on the *Milestone/Status* tab. On this tab, the required fields are highlighted in yellow. The required date field to move a project into the **Active** status is the *Audit Completed* date. This is the day that the audit of the building(s) was completed. The date required to move a project into the **Completed** status is the *Final inspection passed* date. This date indicates that all of the work on the project has been completed and inspected. The date required to move a project into the **Closed** status is the *Project Closed* date. Entering this date into WIDS indicates all bills relating to the building have been paid.

**Milestones**  
\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed		
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed		
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed		
Postponed	* Project postponed temporarily		
Permanently Deferred	* Project permanently deferred		

The dates highlighted in yellow are the dates required to move a project from one status to the next.



The other date fields on the *Milestone/Status* tab, such as the *SERC Work Completed* date field or the *Postponed* date field, are fields that allow non-required, but important information to be shared within an agency or between an agency and Commerce.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: ]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs Audit Validation Attachments

### Project Status History

Project Status	Effective Date	Entered By	Date Entered

### Milestones

\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed		
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed		
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed		
Postponed	* Project postponed temporarily		
Permanently Deferred	* Project permanently deferred		

The unhighlighted fields are not required, but help to provide more information about the timeline of the project.



A feature of the *Milestone/Status* tab is the Project Status History Menu. This menu displays the status changes, the date entered to change the project's particular status, the last person to change the project's status, and the day the *Milestone/Status* date was entered. This menu provides a way to track the evolution of a project.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: ]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs Audit Validation Attachments

### Project Status History

Project Status	Effective Date	Entered By	Date Entered
Every time a project changes statuses, the change is logged in the Project Status History Grid.			

### Milestones

\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed		
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed		
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed		
Postponed	* Project postponed temporarily		
Permanently Deferred	* Project permanently deferred		



## Validation Tab

As previously mentioned, different fields on different tabs will become required as a project progresses through the different status stages. With each Milestone Date added to the *Milestone/Status* tab, more information becomes required. If a user attempts to save a project in order to move it into a new status, but some of the required information is missing, WIDS will prompt the user with a Validation Error Message. This message informs the user that required information is missing and needs to be added before the project can be moved into the next status.

The screenshot shows the Weatherization Information Data System (QA.WX) - [Single Family Project Detail: ] interface. The 'Validation' tab is active, displaying 'Validation Details' with input fields for 'Current Project Status' and 'Validate for this Status'. Below this is a table for 'Validation Messages' with columns for 'Building#', 'Validation Message', and 'Screen Location'. An 'Edit Error' dialog box is open, listing required fields: Agency Project#, Building Type, Street Address, City, and Zip. A text box on the right explains that an error message is displayed if a user attempts to save a project without all required data.

Building#	Validation Message	Screen Location
-----------	--------------------	-----------------

**Edit Error**

- The Agency Project# is required. Please enter a value.
- The Building Type is required. Please enter a value.
- The Street Address is required. Please enter a value.
- The City is required. Please enter a value.
- The Zip is required. Please enter a value.

OK

If a user attempts to save a project, but has not entered all of the required data to move the project to the next status, an error message will be displayed. The error message informs the user of the remaining required data entry.



An important feature of WIDS is the *Validation* tab. If a user wishes to know what information is required to move the project to the next status, the Validation tab lists the required fields, as well as the tab where the fields are located. If a user attempted to save a project missing required information and received a Validation Error Message, then navigate to the *Validation* tab to determine what data needs to be added to the project. If a user starts a project without saving any data and navigates to the *Validation* tab, a Validation Error Message will be generated. At any time, if a project refuses to save, navigate to the *Validation* tab in order to troubleshoot why the project is not saving.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: ]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs Audit **Validation** Attachments

**Validation Details**

Current Project Status

Validate for this Status

Validation Messages

Building#	Validation Message	Screen Location
If a user attempts to save a project to move it into a new status, but required information is missing, the missing data fields will be listed in this grid.		



## Saving a Single Family Project in the Active Status

After a project has been audited, add data to the WIDS project to move the project into the **Active** status. To open the specific project for editing, use the search field on the Project Browse screen to find the project and either double-click on the project or click the Edit button to open it.

Weatherization Information Data System (QA.WX) - [Project Browse]

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#	
Single Family	Permane...	06/05/2011	Commerce		1	111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285		
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242		
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Single Family	Pre-Audit	12/14/2011	Commerce		1	320 N. Market	98532			678	100-25291		
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Evergreen	98406		Smolov, Dan	555	100-25288		
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyland La...	59605			123D	100-25243		
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Sesame St.	98406			962	100-25287		
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Sesame St.	98406			962	100-25287		
Single Family	Completed	07/20/2011	Commerce		1	4876 Chester Cat ...	56872		Wonderland, Alice				
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith				
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Commerce Ave	85602						
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cottage Rd	98506		Queue, Susie				
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orange St	98504		Gecko, Sobe				
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orange St	98504		Gecko, Sobe				
Single Family	Closed	11/25/2011	Commerce	1	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290		
Single Family	Active	05/18/2011	Commerce		1	Hollywood Blvd	99652		Dylan, Bob	657	100-25263		
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dwarves Ln	97654		White, Snow	856D	100-25259		
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233		
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230		

Totals: 20 records



Once the project is opened, navigate to the *Milestone/Status* tab and enter a date into *Audit Completed* field in the *Effective Date* column.

**Project Status History**

Project Status	Effective Date	Entered By	Date Entered
Pre-Audit	12/14/2011	Danielle Sacks	12/14/2011

**Milestones**  
\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed	12/04/2011	
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed		
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed		
Postponed	* Project postponed temporarily		
Permanently Deferred	* Project permanently deferred		

To move a project into the **Active** status, enter a date into this field.



After entering an *Audit Completed* date on the *Milestone/Status* tab, navigate to the *Validation* tab to view the information that is required to move the project from the **Pre-Audit** status to the **Active** status. The following fields (with tab where that particular field is located) are required in order to save the project as an **Active** project: *Is ARRA?* (*Project Details* tab), *Owner Contact* (*Contacts* tab), *Auditor Contact* (*Contacts* tab), *Audit Tool* (*Audit* tab), *Blower Door (pre)* (*Audit* tab), *Building Airflow Standard (BAS)* (*Audit* tab).

**Validation Details**

Current Project Status:

Validate for this Status:

Validation Messages

Building#	Validation Message	Screen Location
Project	Audit Tool is required	Audit - Audit Details
Project	Auditor Contact is required	Contacts - Contact from your Organization
Project	Blower Door (pre) is required	Audit - Audit Details
Project	Building Airflow Standard is required	Audit - Audit Details
Project	Is ARRA? is required	Project Details
Project	Owner Contact is required	Contacts - Project Specific Contacts

After an audit date is entered on the *Milestone/Status* tab, any information that is missing and needed to move project into the **Active** status will be displayed in this table. The Validation Messages table also displays where user can find the fields that require data entry.



The *Is ARRA?* field, located on the *Project Details* tab, is a drop-down menu in which the user must choose either a 'Yes' or a 'No.' If 'Yes' is entered into this field, it is required that cost information be entered into the *ARRA* field on the *Costs* tab. After the user fills in the *Is ARRA?* field and the *ARRA* cost information, the application automatically removes this field from the *Validation* tab.

The screenshot shows the 'Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]' interface. The 'Project Details' tab is active, displaying various fields for project information. A tooltip is overlaid on the 'Is ARRA?' dropdown menu, stating: 'The 'Is ARRA?' field is a required field to move the project into the **Active** status. The user will need to choose 'Yes' or 'No' from the drop-down. If 'Yes' is chosen, ARRA funding information will need to be entered on the **Costs** tab.'

**Project Detail**

Local Agency: 100 - Commerce  
COM Project#: 100-25291  
Agency Project#: 678  
Is ARRA?: [Dropdown menu with Yes/No options]  
Electricity Utility: [Dropdown menu]

Project Status: Pre-Audit

**Building Detail**

Building Type: Mobile/Manufactured  
Street Address: 320 N. Market  
City/State/Zip: Chehalis WA 98532 +4  
Primary Heat/Utility: [Dropdown menu]  
Secondary Heat/Utility: [Dropdown menu]  
Year Built: [Text field]  
Year Previously Weatherized: [Text field]  
# of Units in Building: 1  
Conditioned SQFT: [Text field]  
Annual Heating Cost: [Text field]  
Total Energy Cost: [Text field]  
Description: [Text area]

**Building Characteristics**

Other Characteristics

Characteristic	Yes	No
Rental	<input type="checkbox"/>	<input type="checkbox"/>
Owner Occupied	<input type="checkbox"/>	<input type="checkbox"/>
Shelter	<input type="checkbox"/>	<input type="checkbox"/>
Appl...	<input type="checkbox"/>	<input type="checkbox"/>
No	<input type="checkbox"/>	<input type="checkbox"/>
Knob and Tube	<input type="checkbox"/>	<input type="checkbox"/>
Historic Site	<input type="checkbox"/>	<input type="checkbox"/>
Lead Safe Practi...	<input type="checkbox"/>	<input type="checkbox"/>
HFC	<input type="checkbox"/>	<input type="checkbox"/>
HTF	<input type="checkbox"/>	<input type="checkbox"/>
HUD	<input type="checkbox"/>	<input type="checkbox"/>
USDA	<input type="checkbox"/>	<input type="checkbox"/>
None	<input type="checkbox"/>	<input type="checkbox"/>
Master Metered	<input type="checkbox"/>	<input type="checkbox"/>
Individual Metered	<input type="checkbox"/>	<input type="checkbox"/>
Yes	<input type="checkbox"/>	<input type="checkbox"/>
No	<input type="checkbox"/>	<input type="checkbox"/>

**Project Notes**

[Empty text area]



The next two pieces of required information, both located on the *Contacts* tab, are the *Owner Contact* and the *Auditor Contact*.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details **Contacts** Measures Milestone/Status Demographics Costs Audit Validation Attachments

**Contacts from your Organization**

Pick person from your Organization

Add to Contacts

The *Contacts* tab requires entry of both an Owner Contact and an Auditor Contact in order to move the project into the **Active** status.

Contact Type	First Name	Last Name	Middle	Work#	Cell#	Email Address	Organization	Comments
--------------	------------	-----------	--------	-------	-------	---------------	--------------	----------

**Project Specific Contacts**

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
<input type="text"/>									



# Department of Commerce

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In order to add an auditor, first choose a name from the *Contacts from your Organization* drop-down and then click the Add to Contacts button. This contact and related information will be added to the grid in the middle of the page. Then, the user should choose 'Auditor' from the *Contact Type* drop-down menu. In order for a contact's name to appear on the *Contacts from your Organization* list, the Security Administrator must first add the contact to the Organization Details page.

**Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]**

File Window Help

Project Reports Maintenance

Project Details **Contacts** Measures Milestone/Status Demographics Costs Audit Validation Attachments

**Contacts from your Organization**

Pick person from your Organization

Sacks, Danielle [Add to Contacts]

To add an Auditor Contact, first choose a name from the drop-down and then click the Add to Contacts button.

Contact Type	First Name	Last Name	Middle	Work#	Cell#	Email Address	Organization	Comments
▼	Danielle	Sacks		(360) 725-5007		danielle.sacks@...		

Auditor  
Conservation Education Specialist  
Contractor  
Crew Chief  
Inspector  
Lead  
Monitor

The person added will be displayed in this grid and their contact information will be pre-populated. To finish adding an Auditor Contact, choose 'Auditor' from the drop-down menu.

**Project Specific Contacts**

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
▼									



# Department of Commerce

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To add the *Owner Contact*, use the drop-down menu on the *Project Specific Contacts* grid. Choose the 'Owner' option. The remaining fields on this grid are type-able fields in order for the user to enter the information of the person who owns the building that is being weatherized. As required fields are being filled on the *Contacts* tab, these fields are automatically removed from the *Validation* tab.

The screenshot shows the 'Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]' window. The 'Contacts' tab is active, displaying two sections: 'Contacts from your Organization' and 'Project Specific Contacts'.

**Contacts from your Organization**

Pick person from your Organization  
Sacks, Danielle [dropdown] [Add to Contacts] [Manage Organization Details...]

Contact Type	First Name	Last Name	Middle	Work#	Cell#	Email Address	Organization	Comments
Auditor	Danielle	Sacks		(360) 725-5007		danielle.sacks@...		

**Project Specific Contacts**

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
[dropdown]	Bob	Dole							

**Contact Type Dropdown List:**

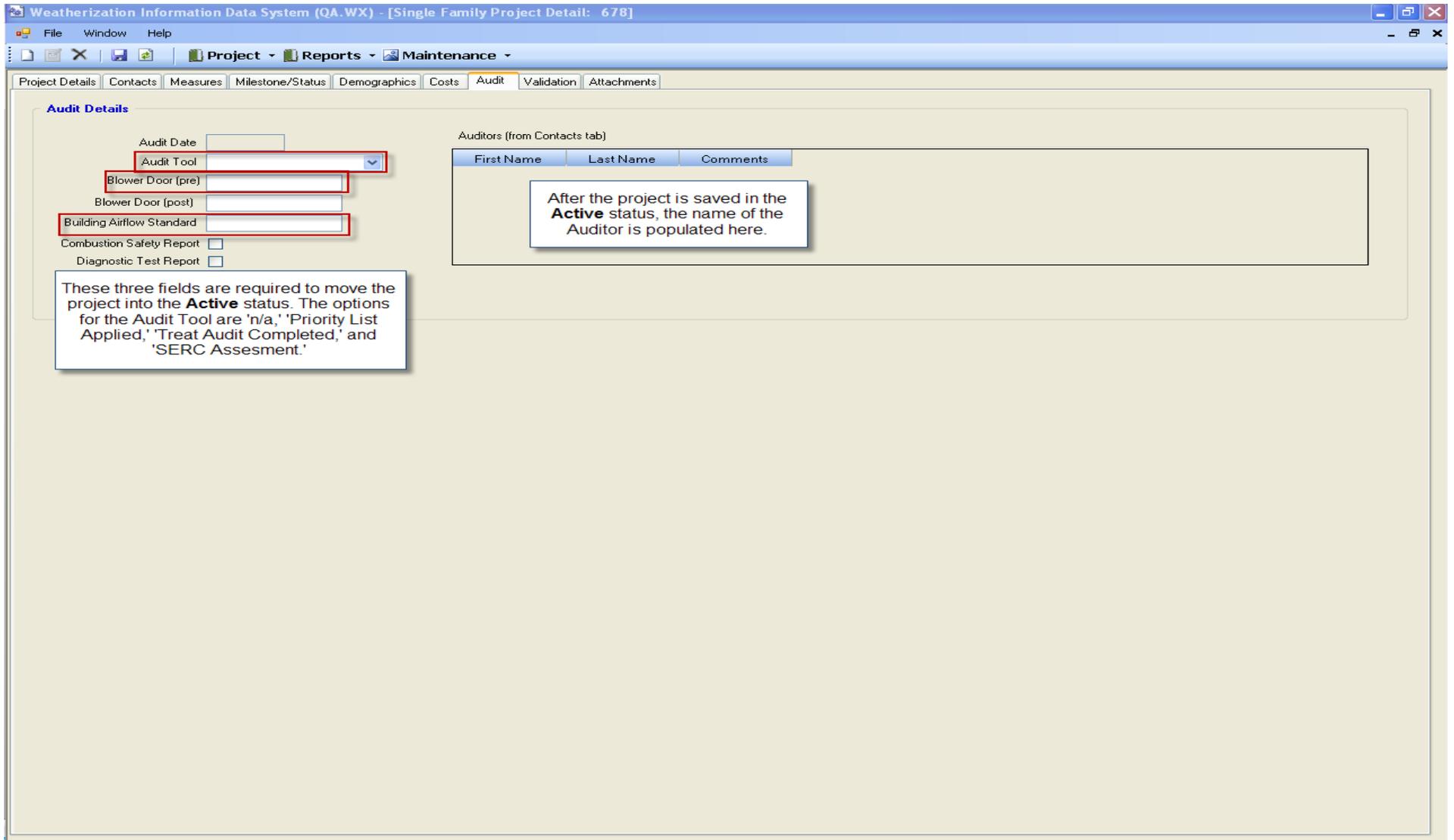
- Authorizing Agent
- Housing Authority
- Occupant
- Onsite Maintenance Manager
- Onsite Property Manager
- Owner**
- Personal Contact
- Power of Attorney
- Property Management Company
- Tribal Representative

**Instructional Callout:**

To add an Owner Contact to a project, select 'Owner' from the Contact Type drop-down. Then, type in the specific owner information.



The final three pieces of information required to move the project into the **Active** status are located on the *Audit* tab. The fields required are *Audit Tool*, *Blower Door (pre)*, and *Building Airflow Standard*. Select an option for the audit tool used from the drop-down menu for the *Audit Tool* field. The *Blower Door (pre)* and *Building Airflow Standard* fields are type-able fields. Once a project has been saved in the **Active** status, the name of the Auditor will appear in the Auditor table.



Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs Audit Validation Attachments

### Audit Details

Audit Date

Audit Tool

Blower Door (pre)

Blower Door (post)

Building Airflow Standard

Combustion Safety Report

Diagnostic Test Report

Auditors (from Contacts tab)

First Name	Last Name	Comments
After the project is saved in the <b>Active</b> status, the name of the Auditor is populated here.		

These three fields are required to move the project into the **Active** status. The options for the Audit Tool are 'n/a,' 'Priority List Applied,' 'Treat Audit Completed,' and 'SERC Assessment.'



After entering all required information to move a project from the **Pre-Audit** status to the **Active** status, save the project using the Save button at the top of the screen. Verify the project is in the **Active** status using either of the following ways: 1)navigate to the *Validation* tab and read the *Current Project Status* under the Validation Details grid; or

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

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Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs Audit **Validation** Attachments

**Validation Details**

Current Project Status: Active

Validate for this Status: Active

Validation Messages

Building#	Validation Message	Screen Location
-----------	--------------------	-----------------

Once a project has been moved into a new status, the current status will be displayed here.



2) navigate to the *Milestone/Status* tab and verify that the most recent change in project status was the move from **Pre-Audit** to **Active** under the Project Status History grid.

The user can verify that the project was properly saved in the **Active** status by checking that the most recent change to the Project Status History table was the move to **Active**.

Project Status	Effective Date	Entered By	Date Entered
Active	12/04/2011	Danielle Sacks	12/14/2011
Pre-Audit	12/14/2011	Danielle Sacks	12/14/2011

**Milestones**  
\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed	12/04/2011	
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed		
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed		
Postponed	* Project postponed temporarily		
Permanently Deferred	* Project permanently deferred		



## Saving a Single Family Project in the Completed Status

After work on a project has been completed and inspected, add data to the WIDS project to move the project into **Completed** status. To open the specific project for editing, use the search field on the Project Browse screen to find the project and either double-click on the project or click the Edit button to open it.

Weatherization Information Data System (QA.WX) - [Project Browse]

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#	
Single Family	Permane...	06/05/2011	Commerce		1	111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285		
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242		
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Single Family	Pre-Audit	12/14/2011	Commerce		1	320 N. Market	98532			678	100-25291		
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Evergreen	98406		Smolov, Dan	555	100-25288		
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyland La...	59605			123D	100-25243		
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Sesame St.	98406			962	100-25287		
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Sesame St.	98406			962	100-25287		
Single Family	Completed	07/20/2011	Commerce		1	4876 Chester Cat ...	56872		Wonderland, Alice				
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith				
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Commerce Ave	85602						
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cottage Rd	98506		Queue, Susie				
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orange St	98504		Gecko, Sobe				
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orange St	98504		Gecko, Sobe				
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290		
Single Family	Active	05/18/2011	Commerce		1	Hollywood Blvd	99652		Dylan, Bob	657	100-25263		
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dwarves Ln	97654		White, Snow	856D	100-25259		
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233		
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTING	98406			TEST	100-25230		

Totals: 20 records

To open a saved project from the Project Browse screen, highlight the project by clicking on it and then click the Edit button. This will open the project in a new window.



Once the project is opened, navigate to the *Milestone/Status* tab and enter a date into *Final inspection passed* field in the *Effective Date* column.

**Project Status History**

Project Status	Effective Date	Entered By	Date Entered
Active	12/04/2011	Danielle Sacks	12/14/2011
Pre-Audit	12/14/2011	Danielle Sacks	12/14/2011

**Milestones**  
\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed	12/04/2011	
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed	12/10/2011	
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed		
Postponed	* Project postponed temporarily		
Permanently Deferred	* Project permanently deferred		

To move a project into the **Completed** status, enter a date into this field.



After entering a *Final inspection passed* date on the *Milestone/Status* tab, navigate to the *Validation* tab to view the information required to move the project from the **Active** status to the **Completed** status. The following information (with tab where that particular piece of information is located) are required in order to save the project as a **Completed** project: *Electricity Utility* (*Project Details* tab), *Primary Heat Source* (*Project Details* tab), *Housing Status* (*Project Details* tab), *Combustion Appliance* (*Project Details* tab), *Meter Type* (*Project Details* tab), *Construction Funding Type* (*Project Details* tab), *Year Built* (*Project Details* tab), *Inspector Contact* (*Contacts* tab), *Contractor Contact* (*Contacts* tab), at least one *Building Measure* (*Measures* tab), three different *Demographic Counts* (*Demographics* tab), a detailed account of *Project Costs* (*Costs* tab), and *Blower Door (post)* (*Audit* tab).

The screenshot shows the 'Validation' tab in the Weatherization Information Data System. At the top, there are two dropdown menus: 'Current Project Status' set to 'Active' and 'Validate for this Status' set to 'Completed'. Below these is a table of 'Validation Messages' with three columns: 'Building#', 'Validation Message', and 'Screen Location'. The table lists 15 validation messages, each corresponding to a specific data requirement and its location in the system. A callout box at the bottom of the table provides additional context.

Building#	Validation Message	Screen Location
Project	At least one Building Measure with a Quantity greater than 0 is required	Measures - Measures
Project	Blower Door (post) is required	Audit - Audit Details
Project	Combustion Appliance is required	Project Details - Building Detail
Project	Construction Funding Type is required	Project Details - Building Detail
Project	Contractor Contact is required	Contacts - Contact from your Organization
Project	Demographic count for "Age Range - # People" required	Demographics - Demographics
Project	Demographic count for "Age Range - # Units" required	Demographics - Demographics
Project	Demographic count for "Income Level - # Units" plus "Not Weatherized" must match the Building Detail "# of Units"	Demographics - Demographics
Project	Electricity Utility is required	Project Details - Project Detail
Project	Housing Status is required	Project Details - Building Detail
Project	Inspector Contact is required	Contacts - Contact from your Organization
Project	Meter Type is required	Project Details - Building Detail
Project	Primary Heat Source is required	Project Details - Building Detail
Project	Project Costs are required.	Costs - Project Costs (Current)
Project	Year Built is required	Project Details - Building Detail

After a Final Inspection passed date is entered on the *Milestone/Status* tab, any information that is missing and needed to move the project into the **Completed** status will be displayed in this table.



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The picture below displays where the required fields are on the *Project Details* tab. The *Electricity Utility* and *Primary Heat Utility* fields are both drop-down fields. The *Year Built* field is a type-able field where the user must enter the date that building was built. The four remaining fields (*Combustion Appliance*, *Construction Funding Type*, *Housing Status*, and *Meter Type*) that are required on the *Project Details* tab in order to move the project in the **Completed** status are located in the Building Characteristics grid on the right-hand side of the screen. These four fields require one box to be checked for each category.

**Project Detail**

Local Agency	100 - Commerce	Project Status	Active
COM Project#	100-25293	Status Date	12/04/2011
Agency Project#	678	Last Updated By	Danielle Sacks
Is ARRA?	No	Last Updated Date	12/14/2011 16:58:27

**Building Detail**

Building Type	Mobile/Manufactured	Parcel#	
Street Address	320 N. Market St.		
City/State/Zip	Chehalis WA 98532	+4	
Primary Heat/Utility			
Secondary Heat/Utility			
Year Built		Year Previously Weatherized	
# of Units in Building	1	Conditioned SQFT	
Annual Heating Cost		Total Energy Cost	
Description			

**Building Characteristics**

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliance	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
Construction Funding Type	<input type="checkbox"/> HFC
	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
Meter Type	<input type="checkbox"/> None
	<input type="checkbox"/> Master Metered
Previously Weatherized	<input type="checkbox"/> Individual Metered
	<input type="checkbox"/> Yes
	<input type="checkbox"/> No

The fields outlined in red are the fields on the *Project Details* tab that are required in order to move the project into the **Completed** status. When these fields are entered and saved, they will be removed from the Validation Messages table.



The next tab that requires information to save the project in the **Completed** status is the *Contacts* tab. To add a *Contractor Contact*, add a contact from the *Contacts from your Organization* drop-down to the grid. Then use the *Contact Type* drop-down in order to choose "Contractor" from the list. The contact information for the person chosen is automatically filled into the rest of this grid by the application.

**Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]**

File Window Help

Project Reports Maintenance

Project Details **Contacts** Measures Milestone/Status Demographics Costs Audit Validation Attachments

### Contacts from your Organization

Pick person from your Organization

Add to Contacts

To add a Contractor Contact, first choose a name from the drop-down and then click the Add to Contacts button.

Contact Type	First Name	Last Name	Middle	Work#	Cell#	Email Address	Organization	Comments
Auditor	Danielle	Sacks		(360) 725-5007		danielle.sacks@...		
▼	Greg	Black		(360) 725-2916		greg.black@com...		

Auditor  
Conservation Education Specialist  
**Contractor**  
Crew Chief  
Inspector  
Lead  
Monitor

The person will be display in this grid and their contact infromation will be pre-populated. To finish adding a Contractor Contact, choose "Contractor" from the drop-down

### Project Specific Contacts

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
Owner	Bob	Dole							
▼									



To add an *Inspector Contact*, add a contact from the *Contacts from your Organization* drop-down to the grid. Then use the *Contact Type* drop-down in order to choose "Inspector" from the list. The contact information for the person chosen is automatically filled into the rest of this grid by the application.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details **Contacts** Measures Milestone/Status Demographics Costs Audit Validation Attachments

**Contacts from your Organization**

Pick person from your Organization

Add to Contacts

To add an Inspector Contact, first choose a name from the drop-down and then click the Add to Contacts button.

Contact Type	First Name	Last Name	Middle	Work#	Cell#	Email Address	Organization	Comments
Auditor	Danielle	Sacks		(360) 725-5007		danielle.sacks@...		
Contractor	Greg	Black		(360) 725-2916		greg.black@com...		
Inspector	Meredith	Angeli		(360) 725-2993		meredith.angeli@...		

Auditor  
Conservation Education Specialist  
Contractor  
Crew Chief  
Inspector  
Lead  
Monitor

The person will be displayed in this grid and their contact information will be pre-populated. To finish adding an Inspector Contact, choose "Inspector" from the

**Project Specific Contacts**

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
Owner	Bob	Dole							



The next tab requiring information in order to move the project into the **Completed** status is the *Measures* tab. On this tab, there is a list of measures (*Measure* column) sorted by different measure categories (*Measure Category*). The user must enter as least one measure in this tab.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts **Measures** Milestone/Status Demographics Costs Audit Validation Attachments

**Measures**

Copy Selected Measure

Measure	Measure	Unit of Measure	Qty	R/U Value Chg	Comments	Wx Specification
Baseload	Client Education	Yes=1				s1.0
	Efficient Lighting (CFL)	Number				s1.0, s24.0
	Efficient lighting fixtures	Number				s1.0, s23.0
	Water heater pipe insulation (6ft hot and c...	Number				s1.0, s16.1, s16.2, s16.5
		Number				s1.0, s15.2, s16.0, s16.1, s16.2, s16.4, s16.5, s16.6, s26.5
		Number				s1.0, s16.3
		Yes=1				s1.0, s15, s15.1, s15.2, s15.3, s15.4
		Number				s1.0, s25.0, s25.1, s25.2, s25.3, s25.4, s25.5, s25.6, s25.7
		Number				s1.0, s25.0, s25.1, s25.2, s25.3, s25.4, s25.5, s25.6, s25.7
	Showerheads	Number				s1.0, s22.1
	Faucet aerators	Number				s1.0, s22.1
	Other baseload	Specify				s1.0
Heating/Cooling ...	Heating system repair	Number				s1.0, s12.1, s12.2, s12.3
	Furnace cleaned and tuned	Number				s1.0, s12.1, s12.2, s12.3
	Heating system replacement	Number				s1.0, s12.4
	Thermostat	Number				s1.0, s14, s14.1, s14.2, s14.3, s14.4, s14.5, s14.6
	Duct sealing	Yes=1				s1.0, s12.5, s13.4, s13.6
	Duct insulation	Yes=1				s1.0, s1.7, s13.10, s13.4, s13.7, s13.8, s5.1
	Duct replacement and repair	Yes=1				s1.0, s12.5, s13.5, s13.6, s13.7, s13.8, s13.9
	Other heating-cooling	Specify				s1.0
Envelope/Insulati...	Ceiling-attic insulation	sqft and change in R-value				s1.0, s5.1, s6.1, s6.10, s6.11, s6.12, s6.13, s6.2, s6.4, s6.5, s6.6, s6.7, s6.8,
	Knee Wall	sqft and change in R-value				s1.0, s1.7, s5.1, s6.10, s6.3
	Wall insulation	sqft and change in R-value				s1.0, s1.7, s26.4, s7.0, s7.1, s7.2, s7.3, s7.4, s7.5, s7.6
	Floor insulation	sqft and change in R-value				s1.0, s26.1, s8.0, s8.1, s8.10, s8.11, s8.12, s8.13, s8.2, s8.3, s8.4, s8.5, s8.6,
	Perimeter insulation	sqft and change in R-value				s1.0, s1.7, s5.1, s8.10, s8.11, s8.9
	Priority air sealing	Yes=1				s1.0, s10.0, s3.0, s5.0, s5.3
	Blower door assisted air sealing	Yes=1				s05.0.4, s1.0, s10.0, s3.0, s5.0, s5.3
	Weather strips-door sweeps	Yes=1				s1.0, s22.1
	Windows	sqft and change in U-value				s1.0, s17.0, s17.1, s17.2, s17.3, s17.4, s17.5, s17.6
	Doors	Number				s1.0, s18.0, s18.1, s18.2, s18.3, s18.4, s18.5, s18.6
	Other shell	Specify				s1.0
Weatherization R...	Electrical repairs	Yes=1				s1.0, s10.1, s5.3, s6.8, s6.9, s7.1
	Plumbing repairs	Yes=1				s1.0, s9.1
	Roof repairs	Yes=1				s1.0, s9.2
	Other repairs	Specify				s1.0

For a project to be moved into the **Completed** status, at least one measure must be entered into the Qty column.



On the *Measures* tab, there is a column labeled *Unit of Measure* that describes how to indicate that a particular measure was used in the building. For some measures, in order to display a particular measure was used, the user must enter a "1" into the *Qty* column. In this case, 1 represents "Yes" for "Yes, this measure was performed." Other measures require that the user enter a quantity amount for how many of that particular measure were completed. Additionally, there are some measures that require the user to enter the square foot amount of the measure installed, as well as the R/U-value change. The R/U-value change amount should be entered into the *R/U Value Chg* column. This column allows data entry only when a particular measure requires an R/U-value change.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs Audit Validation Attachments

**Measures**

Copy Selected Measure

Measure	Measure	Unit of Measure	Qty	R/U	Wx Specification
Baseload	Client Education	Yes=1			
	Efficient Lighting (CFL)	Number			
	Efficient lighting fixtures	Number			
	Water heater pipe insulation (6ft hot and c...	Number			s1.0, s16.1, s16.2, s16.5
	Water heater insulation	Number			s1.0, s15.2, s16.0, s16.1, s16.2, s16.4, s16.5, s16.6, s26.5
	Water heater replacement	Number			s1.0, s16.3
	Water pipe insulation	Yes=1			s1.0, s15, s15.1, s15.2, s15.3, s15.4
	Refrigerator Replacement (non-tribal units)	Number			s1.0, s25.0, s25.1, s25.2, s25.3, s25.4, s25.5, s25.6, s25.7
	Refrigerator Replacement (tribal units)	Number			s1.0, s25.0, s25.1, s25.2, s25.3, s25.4, s25.5, s25.6, s25.7
	Showerheads	Number			s1.0, s22.1
	Faucet aerators	Number			s1.0, s22.1
	Other baseload	Specify			
Heating/Cooling ...	Heating system repair	Number			2.3
	Furnace cleaned and tuned	Number			2.3
	Heating system replacement	Number			
	Thermostat	Number			s1.0, s14, s14.1, s14.2, s14.3, s14.4, s14.5, s14.6
	Duct sealing	Yes=1			s1.0, s12.5, s13.4, s13.6
	Duct insulation	Yes=1			s1.0, s1.7, s13.10, s13.4, s13.7, s13.8, s5.1
	Duct replacement and repair	Yes=1			s1.0, s12.5, s13.5, s13.6, s13.7, s13.8, s13.9
	Other heating-cooling	Specify			
Envelope/Insulati...	Ceiling-attic insulation	sqft and change in R-value			13, s6.2, s6.4, s6.5, s6.6, s6.7, s6.8,
	Knee Wall	sqft and change in R-value			
	Wall insulation	sqft and change in R-value			s7.4, s7.5, s7.6
	Floor insulation	sqft and change in R-value			12, s8.13, s8.2, s8.3, s8.4, s8.5, s8.6,
	Perimeter insulation	sqft and change in R-value			s1.0, s1.7, s5.1, s8.10, s8.11, s8.9
	Priority air sealing	Yes=1			s1.0, s10.0, s3.0, s5.0, s5.3
	Blower door assisted air sealing	Yes=1			s05.0.4, s1.0, s10.0, s3.0, s5.0, s5.3
	Weather strips-door sweeps	Yes=1			s1.0, s22.1
	Windows	sqft and change in U-value			s1.0, s17.0, s17.1, s17.2, s17.3, s17.4, s17.5, s17.6
	Doors	Number			s1.0, s18.0, s18.1, s18.2, s18.3, s18.4, s18.5, s18.6
Other shell	Specify			s1.0	
Weatherization R...	Electrical repairs	Yes=1			s1.0, s10.1, s5.3, s6.8, s6.9, s7.1
	Plumbing repairs	Yes=1			s1.0, s9.1
	Roof repairs	Yes=1			s1.0, s9.2
	Other repairs	Specify			s1.0

Some measure categories require the entry of "1" into the Qty column to indicated that the measure was completed.

Some measure categories require the quantity amount. Here, the user should enter the number quantity that was completed.

Another type of measure category requires the user to enter the total square foot amount of the measure completed, as well as the change in R-value.



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On the *Measures* tab, there is a column labeled *Wx Specification*. If there are any questions regarding the specifications, please refer to the Specifications and Standards section of the Department of Commerce's Weatherization Manual. The *Wx Specification* column lists which specifications are associated with each measure. Hovering the mouse over a row in the *Wx Specification* column will cause a pop-up that includes keywords for the specifications associated with that measure.

**Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]**

File Window Help

Project Reports Maintenance

Project Details Contacts **Measures** Milestone/Status Demographics Costs Audit Validation Attachments

**Measures**

Copy Selected Measure

Measure	Measure	Unit of Measure	Qty	R/U Value Chg	Comments	Wx Specification
Baseload	Client Education	Yes=1				s1.0
	Efficient Lighting (CFL)	Number				s1.0, s24.0
	Efficient lighting fixtures	Number				s1.0, s23.0
	Water heater pipe insulation (6ft hot and c...	Number				s1.0, s16.1, s16.2, s16.5
	Water heater insulation	Number				s1.0, s15.2, s16.0, s16.1, s16.2, s16.4, s16.5, s16.6, s26.5
	Water heater replacement	Number				s1.0, s16.3
	Water pipe insulation	Yes=1				s1.0, s15, s15.1, s15.2, s15.3, s15.4
	Refrigerator Replacement (non-tribal units)	Number				s1.0, s25.0, s25.1, s25.2, s25.3, s25.4, s25.5, s25.6, s25.7
	Refrigerator Replacement (tribal units)	Number				s1.0, s25.0, s25.1, s25.2, s25.3, s25.4, s25.5, s25.6, s25.7
	Showerheads	Number				s1.0, s22.1
	Faucet aerators	Number				s1.0, s22.1
	Other baseload	Specify				s1.0
Heating/Cooling ...	Heating system repair	Number				s1.0, s12.1, s12.2, s12.3
	Furnace cleaned and tuned	Number				s1.0, s12.1, s12.2, s12.3
	Heating system replacement	Number				s1.0, s12.4
	Thermostat	Number				s1.0, s14, s14.1, s14.2, s14.3, s14.4, s14.5, s14.6
	Duct sealing	Yes=1				s1.0, s12.5, s13.4, s13.6
	Duct insulation	Yes=1				s1.0, s1.0 General Requirements s12.5 Pressure pan testing s13.4 Duct sealing and duct insulating materials s13.6 Duct sealing
	Duct replacement and repair	Yes=1				s1.0
	Other heating-cooling	Specify				s1.0
Envelope/Insulati...	Ceiling-attic insulation	sqft and change in R-value				s1.0, s5.1, s6.1, s6.10, s6.11, s6.12, s6.13, s6.2, s6.4, s6.5, s6.6, s6.7, s6.8,
	Knee Wall	sqft and change in R-value				s1.0, s1.7, s5.1, s6.10, s6.3
	Wall insulation	sqft and change in R-value				s1.0, s1.7, s26.4, s7.0, s7.1, s7.2, s7.3, s7.4, s7.5, s7.6
	Floor insulation	sqft and change in R-value				s1.0, s26.1, s8.0, s8.1, s8.10, s8.11, s8.12, s8.13, s8.2, s8.3, s8.4, s8.5, s8.6,
	Perimeter insulation	sqft and change in R-value				s1.0, s1.7, s5.1, s8.10, s8.11, s8.9
	Priority air sealing	Yes=1				s1.0, s10.0, s3.0, s5.0, s5.3
	Blower door assisted air sealing	Yes=1				s05.0.4, s1.0, s10.0, s3.0, s5.0, s5.3
	Weather strips-door sweeps	Yes=1				s1.0, s22.1
	Windows	sqft and change in U-value				s1.0, s17.0, s17.1, s17.2, s17.3, s17.4, s17.5, s17.6
	Doors	Number				s1.0, s18.0, s18.1, s18.2, s18.3, s18.4, s18.5, s18.6
	Other shell	Specify				s1.0
Weatherization R...	Electrical repairs	Yes=1				s1.0, s10.1, s5.3, s6.8, s6.9, s7.1
	Plumbing repairs	Yes=1				s1.0, s9.1
	Roof repairs	Yes=1				s1.0, s9.2
	Other repairs	Specify				s1.0



The next tab that requires data entry in order to move the project in the **Completed** status is the *Demographics* tab. On this tab, the user needs to indicate number of units by income levels and number of people served. Additionally, the user needs to indicate on this sub-tab the number of units that contained people within certain age ranges and how many people were in those ranges.

Category	Demographic Item	# Units	# People
Income Level	Under 75% of Poverty Level		
	75% - 100% of Poverty Level		
	101% - 125% of Poverty Level		
	126% - 200% of Poverty Level		
	Over 200% of Poverty Level		
	Unknown		
<b>Total # of Uni...</b>			
<b>Not Weatheri...</b>	Not Weatherized		
Age range	0-5		
	6-59		
	60+		
	Unknown		
<b>Total People ...</b>			
Other	Disabled		
	Native American		



# Department of Commerce

Innovation is in our nature.

As only 66% of the people being served in the units need to be income qualified, data does not need to be collected about all the units in some Multi-Family projects. To indicate that information was not gathered about all of the units, there is a field to indicate how many units were not surveyed. This field is labeled *Unknown*.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status **Demographics** Costs Audit Validation Attachments

### Demographics

Category	Demographic Item	# Units	# People
Income Level	Under 75% of Poverty Level		
	75% - 100% of Poverty Level		
	101% - 125% of Poverty Level		
	126% - 200% of Poverty Level		
	Over 200% of Poverty Level		
	Unknown		
<b>Total # of Uni...</b>			
<b>Not Weatheri...</b>	Not Weatherized		
Age range	0-5		
	6-59		
	60+		
	Unknown		
<b>Total People ...</b>			
Other	Disabled		
	Native American		

If there were units that did not have demographic data collected, enter how many of these units there were in this field.



Additionally, one of the validation messages from the Validation Messages table states that the Total # of Units Weatherized (which is a field that auto-fills with the sum of the number of units from the Income Level section of the Demographics tab and the Not Weatherized Section of the Demographics tab) must equal the # of Units in Building field on the Project Details tab, Basic/Characteristics sub-tab.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status **Demographics** Costs Audit Validation Attachments

### Demographics

Category	Demographic Item	# Units	# People
Income Level	Under 75% of Poverty Level		
	75% - 100% of Poverty Level		
	101% - 125% of Poverty Level		
	126% - 200% of Poverty Level		
	Over 200% of Poverty Level		
	Unknown		
<b>Total # of Uni...</b>			
<b>Not Weatheri...</b>	Not Weatherized		
Age range	0-5		
	6-59		
	60+		
	Unknown		
<b>Total People ...</b>			
Other	Disabled		
	Native American		

The number of units in these two fields, combined, must equal the number of units entered on the Project Details tab.









The Project Costs (Historical Snapshot) provides a history of the *Costs* tab. It allows the user, a local agency, and Commerce to see when the *Costs* tab was altered and in what way it was altered.

The screenshot shows the 'Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]' interface. The 'Costs' tab is highlighted in the navigation menu. The 'Project Costs (Current)' table is displayed with the following data:

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total	Comments
ARRA -- American Recovery & Rein...						
BPA -- Bonneville Power Administrat...						
LIHEAP -- Low Income Heating Ass...						
MMPW -- Match Maker Program - ...						
MMPR -- Match Maker Program - R...						
DOE -- Department of Energy						
SERC -- Sustainable Energy Resour...						
Local -- Local Match						
Owner -- Owner Contribution						
Other -- Other Source						
Unassigned -- Unassigned						
Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

The 'Project Costs (Historical Snapshots)' section includes a dropdown menu for 'Select Cost Snapshot to View'. Below it, a table structure is shown, but it is currently empty. A text box explains: 'The Project Costs table will display the history of the *Costs* tab. Whenever changes to the *Costs* tab are made, those changes are recorded in this table.'

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total	Comments
Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	



The final tab requiring data entry to move the project into the **Completed** status is the *Audit* tab. On this tab, in the *Blower Door (post)* field, fill in the results of the Blower Door Test after the weatherization measures were installed .

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs **Audit** Validation Attachments

### Audit Details

Audit Date	12/04/2011	Auditors (from Contacts tab)	
Audit Tool	Priority List Applied		Comments
Blower Door (pre)	2250		
<b>Blower Door (post)</b>	<b>1150</b>		
Building Airflow Standard	600		
Combustion Safety Report	<input type="checkbox"/>		
Diagnostic Test Report	<input type="checkbox"/>		

In order for the project to be saved in the **Completed** status, the user must enter a Blower Door result on the *Audit* tab.



After filling in all required information to move the project into the **Completed** status, save the project and then navigate back to the *Validation* tab to verify that all of the required information has been entered (which will mean that there are no more Validation Messages listed in the table) and that the project has been moved into **Completed** status. This will be displayed in the Validation Details table.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs Audit Validation Attachments

**Validation Details**

Current Project Status: Completed

Validate for this Status: Completed

The current project status can be verified on the *Validation* tab.

Validation Messages

Building#	Validation Message	Screen Location
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If all the required information has been entered to move the project into the **Completed** status, no messages will be displayed in the Validation Messages table after the project has been saved.



## Saving a Single Family Project in the Closed Status

After all payments on the project are made, add information into WIDS to move the project into the **Closed** status. To open the specific project for editing, use the search field on the Project Browse screen to find the project and either double-click on the project or click the Edit button to open it.

**Weatherization Information Data System (QA.WX) - [Project Browse]**

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#	
Single Family	Permane...	06/05/2011	Commerce		1	111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285		
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242		
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Single Family	Pre-Audit	12/14/2011	Commerce		1	320 N. Market	98532			678	100-25291		
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Evergreen	98406		Smolov, Dan	555	100-25288		
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyland La...	59605			123D	100-25243		
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Sesame St.	98406			962	100-25287		
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Sesame St.	98406			962	100-25287		
Single Family	Completed	07/20/2011	Commerce		1	4876 Chester Cat ...	56872		Wonderland, Alice				
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith				
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Commerce Ave	85602						
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cottage Rd	98506		Queue, Susie				
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orange St	98504		Gecko, Sobe				
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orange St	98504		Gecko, Sobe				
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290		
Single Family	Active	05/18/2011	Commerce		1	Hollywood Blvd	99652		Dylan, Bob	657	100-25263		
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dwarves Ln	97654		White, Snow	856D	100-25259		
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233		
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230		

Totals: 20 records

To open a saved project from the Project Browse screen, highlight the project by clicking on it and then click the Edit button. This will open the project in a new window.



Once the project has been opened, navigate to the *Milestone/Status* tab and enter a date into *Project Closed* field in the *Effective Date* column.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures **Milestone/Status** Demographics Costs Audit Validation Attachments

### Project Status History

Project Status	Effective Date	Entered By	Date Entered
Completed	12/10/2011	Danielle Sacks	12/21/2011
Active	12/04/2011	Danielle Sacks	12/14/2011
Pre-Audit	12/14/2011	Danielle Sacks	12/14/2011

### Milestones

\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed	12/04/2011	
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed	12/10/2011	
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed	12/21/2011	
Postponed	* Project postponed temporarily		
Permanently Deferred	* Project permanently deferred		

To move a project into the **Closed** status, enter a date into this field.



After entering a date into the *Project Closed* field, navigate to the *Validation* tab to view the information that is required to move the project from the **Completed** status to the **Closed** status. The following information (with tab where that particular piece of information is located) is required in order to save the project as a **Closed** project: Unassigned Costs (*Costs* tab).

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs Audit **Validation** Attachments

**Validation Details**

Current Project Status: Closed

Validate for this Status: Closed

Validation Messages

Building#	Validation Message	Screen Location
Project	Unassigned Costs are not allowed when moving the project to Closed status	Costs - Project Costs (Current)

When attempting to move a project into the **Closed** status, any unassigned costs will be displayed in the Validation Messages table.



In order to move the project into the **Closed** status, any costs originally entered and remaining in the *Unassigned* field on the *Costs* tab will need to be removed and amounts will need to be assigned to specific funding sources.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics **Costs** Audit Validation Attachments

### Project Costs (Current)

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total	Comments
LIHEAP -- Low Income Heating Ass...	\$3,453.69				\$3,453.69	
MMPW -- Match Maker Program - ...						
MMPR -- Match Maker Program - R...						
DDE -- Department of Energy	\$1,287.96				\$1,287.96	
SERC -- Sustainable Energy Resour...						
Local -- Local Match						
Owner -- Owner Contribution						
Other -- Other Source						
Utility - Cascade Natural Gas Corpor...						
Utility - Coulee Dam, City of						
Unassigned -- Unassigned	\$50.00				\$50.00	
<b>Totals</b>	<b>\$4,791.65</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$4,791.65</b>	

The amount entered in the *Unassigned* cost category will need to be allocated to a specific funding source before the project can be saved in the **Closed** status.

### Project Costs (Historical Snapshots)

Select Cost Snapshot to View: 12/21/2011 - Project Cost Total = \$4741.65 (Current)

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total	Comments
LIHEAP -- Low Income Heating Ass...	\$3,453.69				\$3,453.69	
DDE -- Department of Energy	\$1,287.96				\$1,287.96	
<b>Totals</b>	<b>\$4,741.65</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$4,741.65</b>	



After entering the required cost information, save the project and navigate back to the *Validation* tab. In order to save the project and move it into the **Closed** status, there should be no messages remaining in the Validation Messages Table. If there are no remaining messages, the project should have been moved into the **Closed** status. This will be displayed in the Validation Details table.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status Demographics Costs Audit **Validation** Attachments

**Validation Details**

Current Project Status: Closed

Validate for this Status: Closed

The project's **Closed** status can be verified on the *Validation* tab.

Validation Messages

Building#	Validation Message	Screen Location
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# Multi-Family Project

## Introduction to Starting a New Multi-Family Project

The option to start a new Multi-Family Project can be found under the Project drop-down at the top of the screen. The project will open in a new window.

**Project Browse**  
 New Single Family Project  
**New Multi-Family Project**  
 Schedule New Trip  
 Scheduled Trip Browse  
 Upload Project Data  
 Upload Contact Data

To start a new Multi-Family Project, click on the Project drop-down and go to "New Multi-Family Project."

Project Type	Status	Occupant	Owner Name	Agcy Project#	COM Project#	Parcel#
Multi-Family	Pre-Audit			TEST	100-25230	
Single Family	Active		angeli, meredith	123	100-25232	582-AZ86
Single Family	Closed		TESTING, TEST	Test123	100-25233	
Single Family	Pre-Audit			123D	100-25243	
Single Family	Pre-Audit		Queue, Susie	568D	100-25247	
Multi-Family	Closed		White, Snow	856D	100-25259	
Single Family	Active		Dylan, Bob	657	100-25263	
Single Family	Completed		Wonderland, Alice	1052	100-25277	
Multi-Family	Active		Turing, Alan	9965	100-25278	
Multi-Family	Active		Turing, Alan	9965	100-25278	
Single Family	Permane...	Barack Obama	Obama, Michelle	556	100-25285	
Single Family	Pre-Audit			885	100-25286	
Multi-Family	Pre-Audit			962	100-25287	
Multi-Family	Pre-Audit			962	100-25287	
Single Family	Active		Sacks, Danielle	TESTING	100-25242	
Multi-Family	Active		Smolov, Dan	555	100-25288	
Multi-Family	Active		Gecko, Sobe	888	100-25289	
Multi-Family	Active		Gecko, Sobe	888	100-25289	
Multi-Family	Closed		Smith, Susan	565	100-25290	
Single Family	Closed		Dole, Bob	678	100-25293	

Totals: 20 records



Opening a new Single Family Project will bring a user to the first tab of the project. This tab is labeled *Project Details*. Each project contains six tabs. These tabs are: *Project Details*, *Contacts*, *Milestone/Status*, *Cost Summary*, *Validation*, and *Attachments*. Each of these tabs contains both required and optional fields (except the *Attachments* tab – which is entirely optional). However, to initially save a project, only one tab requires information.

**Project Details**

Local Agency: 100 - Commerce  
CDM Project#:   
Agency Project#:   
Is ARRA?   
Project Status:   
Status Date:   
Project Notes:   
Electricity Utility:   
**Select a Building**

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
-------	-----------	----------	---------	-------------	---------	------------	-------	------------	---------------

**Details for the Selected Building Above**

**Basics/Characteristics** | Audit | Building Milestones | Measures | Demographics | Costs

**Building Detail**

Building#:   
Building Name:   
Building Type:   
Street Address:   
City/State/Zip: WA   
Primary Heat/Utility:   
Secondary Heat/Utility:   
Year Built:   
# of Units in Building:   
Annual Heating Cost:   
Complex Name:   
Parcel#:   
Year Previously Weatherized:   
Conditioned SQFT:   
Total Energy Cost:   
Description:   
**Building Characteristics**

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliances	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
	<input type="checkbox"/> HFC
Construction Funding Type	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
	<input type="checkbox"/> None
Meter Type	<input type="checkbox"/> Master Metered
	<input type="checkbox"/> Individual Metered
Previously Weatherized	<input type="checkbox"/> Yes
	<input type="checkbox"/> No



Additionally, each building added to a Multi-Family project will have its own set of six tabs. These tabs are: *Basics/Characteristics*, *Audit*, *Building Milestones*, *Measures*, *Demographics*, and *Costs*. Each of these tabs contains both required and optional fields, however, only one of these building specific tabs requires information to initially save the project.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: ]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Project Notes:   
 COM Project#: Status Date:   
 Agency Project#: Last Updated By:   
 Is ARRA?: Last Updated Date: Electricity Utility:

**Select a Building**

New Building Copy Building # to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Measures Demographics Costs

**Building Detail**

Building#: Complex Name:   
 Building Name: Parcel#:   
 Building Type:   
 Street Address:   
 City/State/Zip: WA +4   
 Primary Heat/Utility:   
 Secondary Heat/Utility:   
 Year Built: Year Previously Weatherized:   
 # of Units in Building: Conditioned SQFT:   
 Annual Heating Cost: Total Energy Cost:   
 Description:

This is the first sub-tab of a new Multi-Family project. Each building added to a Multi-Family project has its own set of six sub-tabs.

Characteristic	
Rental	<input type="checkbox"/>
Owner Occupied	<input type="checkbox"/>
Shelter	<input type="checkbox"/>
Combustion Appliances	<input type="checkbox"/>
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>
Other	<input type="checkbox"/>
Knob and Tube	<input type="checkbox"/>
Historic Site	<input type="checkbox"/>
Lead Safe Practi...	<input type="checkbox"/>
Construction Funding Type	<input type="checkbox"/>
HFC	<input type="checkbox"/>
HTF	<input type="checkbox"/>
HUD	<input type="checkbox"/>
USDA	<input type="checkbox"/>
None	<input type="checkbox"/>
Meter Type	<input type="checkbox"/>
Master Metered	<input type="checkbox"/>
Individual Metered	<input type="checkbox"/>
Previously Weatherized	<input type="checkbox"/>
Yes	<input type="checkbox"/>
No	<input type="checkbox"/>



## Saving a New Multi-Family Project in the Pre-Audit Status

In order to successfully save a new Single Family Project, basic information must be entered into WIDS. These required fields are located on the *Project Details* tab and its sub-tab, *Basics/Characteristics*, and are highlighted in yellow. Other fields in the application will become required as Milestone Dates are entered on the *Milestone/Status* tab, however, to initially create a record, these yellow highlighted fields are the only fields which require data. Entering data into just these yellow highlighted fields will save the new Multi-Family Project in the **Pre-Audit** status.

The screenshot displays the 'Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: ]' application. The interface includes a menu bar (File, Window, Help) and a toolbar with 'Project', 'Reports', and 'Maintenance' options. The main content area is divided into several sections:

- Project Detail:** Contains fields for Local Agency (100 - Commerce), CDM Project#, Agency Project# (highlighted in yellow), Is ARRA?, Project Status, Status Date, Last Updated By, Last Updated Date, Project Notes, and Electricity Utility.
- Select a Building:** Includes buttons for 'New Building' and 'Copy Building', and a table with columns: Bldg#, Bldg Name, Yr Built, # Units, Measures, Audit, Final Insp, and Building Cost.
- Details for the Selected Building Above:**
  - Basics/Characteristics:** Contains fields for Building# (highlighted in yellow), Building Name, Building Type (dropdown), Street Address (highlighted in yellow), City/State/Zip (WA, highlighted in yellow), Primary Heat/Utility, Secondary Heat/Utility, Year Built, # of Units in Building (highlighted in yellow), Annual Heating Cost, Description, Complex Name, Parcel#, Year Previously Weatherized, Conditioned SQFT, and Total Energy Cost.
  - Building Characteristics:** A table with columns 'Category' and 'Characteristic'. It lists various characteristics with checkboxes, such as Rental, Owner Occupied, Shelter, Combustion Appliances, Yes, No, Knob and Tube, Historic Site, Lead Safe Pract..., HFC, HTF, HUD, USDA, None, Meter Type, Master Metered, Individual Metered, Previously Weatherized, Yes, and No.

A callout box with a white background and black border points to the yellow-highlighted fields, stating: "The fields highlighted in yellow are the fields required to save a Multi-Family project in the **Pre-Audit** status."



## Saving a Multi-Family Project in the Active Status

After a project has been audited, add more data to the project in WIDS to move the project into the **Active** status. To open the specific project for editing, use the search field on the Project Browse screen to find the project and either double-click on the project or click the Edit button to open it.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#	
Single Family	Permane...	06/05/2011	Commerce		1	111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285		
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242		
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Single Family	Pre-Audit	12/14/2011	Commerce		1	320 N. Market	98532			678	100-25291		
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Evergreen	98406		Smolov, Dan	555	100-25288		
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyland La...	59605			123D	100-25243		
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Sesame St.	98406			962	100-25287		
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Sesame St.	98406			962	100-25287		
Single Family	Completed	07/20/2011	Commerce		1	4876 Chester Cat ...	56872		Wonderland, Alice				
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith				
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Commerce Ave	85602						
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cottage Rd	98506		Queue, Susie				
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orange St	98504		Gecko, Sobe				
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orange St	98504		Gecko, Sobe				
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290		
Single Family	Active	05/18/2011	Commerce		1	Hollywood Blvd	99652		Dylan, Bob	657	100-25263		
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dwarves Ln	97654		White, Snow	856D	100-25259		
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTING, TEST	Test123	100-25233		
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230		

Totals: 20 records

To open a saved project from the Project Browse screen, highlight the project by clicking on it and then click the Edit button. This will open the project in a new window.



Once the project has been opened, navigate to the *Milestone/Status* tab and enter a date into *Audit Completed* field in the *Effective Date* column.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts **Milestone/Status** Cost Summary Validation Attachments

### Project Status History

Project Status	Effective Date	Entered By	Date Entered
Pre-Audit	12/21/2011	Danielle Sacks	12/21/2011

### Milestones

\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed	12/10/2011	
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed		
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed		
Postponed	* Project postponed temporarily		
Permanently Def...	* Project permanently deferred		

To save the project into the **Active** status, a date needs to be entered into the *Audit completed* field.



Additionally, navigate to the *Project Details* tab, and then the *Building Milestones* sub-tab, and enter an *Audit Completed* date for each building that has been added to the project. How to add multiple buildings to Multi-Family projects will be addressed later in this manual.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Pre-Audit Project Notes:

COM Project#: 100-25294 Status Date: 12/21/2011

Agency Project#: 987 Last Updated By: Danielle Sacks

Is ARRA?  Last Updated Date: 12/21/2011 13:47:04 Electricity Utility:

**Select a Building**

# to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						

**Details for the Selected Building Above**

Basics/Characteristics Audit **Building Milestones** Measures Demographics Costs

Building Status	Milestone	Effective Date	Comments
Active	* Audit completed	12/10/2011	
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews as...		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed		

Additionally, to move a Multi-Family project to the **Active** status, the user needs to enter a date into the *Audit Completed* field on the *Building Milestones* sub-tab.



After entering an *Audit Completed* date on the *Milestone/Status* tab, navigate to the *Validation* tab to view the information required to move the project from the **Pre-Audit** status to the **Active** status. The *Validation* tab informs the user on what tab each piece of necessary information is located. The following fields (with tab where that particular field is located) are required in order to save the project as an **Active** project: *Is ARRA?* (*Project Details* tab), *Audit Tool* (*Project Details* tab), *Owner Contact* (*Contacts* tab), and *Auditor Contact* (*Contacts* tab).

**Validation Details**

Current Project Status:

Validate for this Status:

Validation Messages

Building#	Validation Message	Screen Location
1	Audit Tool is required	Project Details - Audit - Audit Details
Project	Auditor Contact is required	Contacts - Contact from your Organization
Project	Is ARRA? is required	Project Details
Project	Owner Contact is required	Contacts - Project Specific Contacts

The Validation Messages table displays the information required to move the Multi-Family project from the **Pre-Audit** status to the **Active** status.



# Department of Commerce

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The *Is ARRA?* field, located on the *Project Details* tab, is a drop-down menu in which the user must choose either a 'Yes' or a 'No.' If 'Yes' is entered into this field, it be required that cost information be entered into the *ARRA* field on the *Costs* tab for each specific building. After the user fills in the *Is ARRA?* field and the ARRA cost information, the application automatically removes this field from the *Validation* tab.

**Project Details** | Contacts | Milestone/Status | Cost Summary | Validation | Attachments

**Project Detail**

Local Agency: 100 - Commerce | Project Status: Pre-Audit | Project Notes: [Text Area]  
COM Project#: 100-25294 | Status Date: 12/21/2011  
Agency Project#: 987  
**Is ARRA?** [Dropdown] | Electricity Utility: [Dropdown]

**Select a Building** | New Building | Copy Build

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						

**Details for the Selected Building Above**

**Basics/Characteristics** | Audit | Building Milestones | Measures | Demographics | Costs

**Building Detail**

Building#: 1 | Complex Name: [Text Field]  
Building Name: [Text Field] | Parcel#: [Text Field]  
Building Type: MF 5+ Units [Dropdown]  
Street Address: 1011 Plum St. SE  
City/State/Zip: Olympia, WA, 98504 +4  
Primary Heat/Utility: [Dropdown] | [Text Field]  
Secondary Heat/Utility: [Dropdown] | [Text Field]  
Year Built: [Text Field] | Year Previously Weatherized: [Text Field]  
# of Units in Building: 2 | Conditioned SQFT: [Text Field]  
Annual Heating Cost: [Text Field] | Total Energy Cost: [Text Field]  
Description: [Text Area]

**Building Characteristics**

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliances	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
	<input type="checkbox"/> None
Construction Funding Type	<input type="checkbox"/> HFC
	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
Meter Type	<input type="checkbox"/> Master Metered
	<input type="checkbox"/> Individual Metered
Previously Weatherized	<input type="checkbox"/> Yes
	<input type="checkbox"/> No



The next required field to move the project into the **Active** status is the *Audit Tool* field. This field is located on the *Project Details* tab, *Audit* sub-tab. To enter the audit tool used, choose an option from the *Audit Tool* drop-down.

The screenshot shows the Weatherization Information Data System (QA.WX) interface. The main window title is "Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]". The interface includes a menu bar (File, Window, Help) and a toolbar with icons for Project, Reports, and Maintenance. The "Project Details" tab is active, showing fields for Local Agency (100 - Commerce), CDM Project# (100-25294), Agency Project# (987), Project Status (Pre-Audit), Status Date (12/21/2011), Last Updated By (Danielle Sacks), Last Updated Date (12/21/2011 13:47:04), and Electricity Utility. Below this is a "Select a Building" section with a table:

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						

Below the table is the "Details for the Selected Building Above" section, with the "Audit" sub-tab selected. The "Audit Details" section includes fields for Audit Date, Auditor, Audit Tool (a drop-down menu), Blower Door (pre) (n/a), Blower Door (post), Building Airflow Standard, Combustion Safety Report, and Diagnostic Test Report. A callout box points to the "Audit Tool" drop-down menu with the text: "Add an audit tool by selecting an option from the *Audit Tool* drop-down." The drop-down menu is open, showing options: n/a, Priority List Applied, Treat Audit Completed, and SERC Assessment.



The next two pieces of required information, both located on the *Contacts* tab, are the *Owner Contact* and the *Auditor Contact*.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details **Contacts** Milestone/Status Cost Summary Validation Attachments

### Contacts from your Organization

Pick person from your Organization

Add to Contacts [Manage Organization Details...](#)

Contact Type	First Name	Last Name	Middle	Work#	Cell#	Email Address	Organization	Comments
An Auditor Contact and Owner Contact are both required to move the project into the <b>Active</b> status.								

### Project Specific Contacts

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
▼									
▼									



# Department of Commerce

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In order to add an auditor, first choose a name from the *Contacts from your Organization* drop-down and then click the Add to Contacts button. This contact and related information will be added to the grid in the middle of the page. Then, choose 'Auditor' from the *Contact Type* drop-down menu. In order for a contact's name to appear on the *Contacts from your Organization* list, the Security Administrator must first add the contact to the Organization Details page.

The screenshot shows the 'Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]' interface. The 'Contacts' tab is active, showing the 'Contacts from your Organization' section. A dropdown menu is open, displaying a list of contact types: Auditor, Conservation Education Specialist, Contractor, Crew Chief, Inspector, Lead, and Monitor. The 'Auditor' option is selected. A callout box states: 'To add an Auditor Contact, first choose someone from the Contacts from your Organization drop-down and click the Add to Contacts button.' Below the dropdown is an 'Add to Contacts' button. A table below shows the contact details for Danielle Sacks, with the 'Contact Type' dropdown set to 'Auditor'. Another callout box states: 'Then, choose 'Auditor' from the Contact type drop-down.' Below this is the 'Project Specific Contacts' section, which is currently empty.

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
Auditor	Danielle	Sacks		[360] 725-5007			danielle.sacks@...		

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments



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To add the *Owner Contact*, use the drop-down menu on the *Project Specific Contacts* grid to choose the 'Owner' option. The remaining fields on this grid are type-able fields to enter the information of the person who owns the subject building. As required fields are filled in on the *Contacts* tab, these fields are automatically removed from the *Validation* tab.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details **Contacts** Milestone/Status Cost Summary Validation Attachments

### Contacts from your Organization

Pick person from your Organization

Add to Contacts Manage Organization Details...

Contact Type	First Name	Last Name	Middle	Work#	Cell#	Email Address	Organization	Comments
Auditor	Danielle	Sacks		(360) 725-5007		danielle.sacks@...		

### Project Specific Contacts

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
Owner	Margaret	Thatcher							

To add an Owner Contact, select 'Owner' from the Contact Type drop-down menu. Then, type in the owner's contact information.



After filling in the required information, save the project and navigate back to the *Validation* tab. The Validation Details table will confirm if the project has been properly moved in the **Active** status.

The screenshot shows a web application window titled "Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]". The application has a menu bar with "File", "Window", and "Help". Below the menu bar are navigation tabs: "Project", "Reports", and "Maintenance". The "Validation" tab is selected and highlighted with a red box. The "Validation Details" section contains two dropdown menus: "Current Project Status" and "Validate for this Status", both set to "Active". A white message box with a black border is overlaid on the page, containing the text: "If all of the required information has been entered and the project has ben saved, the *Validation* tab will verify that the Multi-Family project has been moved into the **Active** status." Below the message box is a table with the following structure:

Building#	Screen Location
-----------	-----------------



## Saving a Multi-Family Project in the Completed Status

After the work on a project has been completed and inspected, add data to the WIDS project to move the project into the **Completed** status. However, before a project can be moved into the **Completed** status, each building within that project has to be moved into the **Completed** status. Each building within a project has required information and its own set of validation messages. To open the specific building for editing, use the search field on the Project Browse screen to find the building and either double-click on the project or click the Edit button to open it.

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#	Edit
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230		
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	582-AZ86	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTIN				
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyland La...	59605						
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cottage Rd	98506		Queue				
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dwarves Ln	97654		White, S				
Single Family	Active	05/18/2011	Commerce		1	Hollywood Blvd	99652		Dylan, B	897	100-25289		
Single Family	Completed	07/20/2011	Commerce		1	4876 Chester Cat ...	56872		Wonderland, Alice	1052	100-25277		
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Single Family	Permane...	06/05/2011	Commerce		1	111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285		
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Commerce Ave	85602			885	100-25286		
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Sesame St.	98406			962	100-25287		
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Sesame St.	98406			962	100-25287		
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242		
Multi-Family	Active	11/15/2011	Commerce	1	2	411 N. Evergreen	98406		Smolov, Dan	555	100-25288		
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orange St	98504		Gecko, Sobe	888	100-25289		
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orange St	98504		Gecko, Sobe	888	100-25289		
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290		
Single Family	Closed	12/21/2011	Commerce		1	320 N. Market St.	98532		Dole, Bob	678	100-25293		
Multi-Family	Active	12/10/2011	Commerce	1	2	1011 Plum St. SE	98504		Thatcher, Margaret	987	100-25294		

Totals 21 records



## Moving a Building in a Multi-Family Project to the Completed Status

Once the project has been opened, navigate to the *Project Details* tab and enter a date into *Final inspection passed* field in the *Effective Date* column of the building specific *Building Milestone* sub-tab.

The screenshot shows the Weatherization Information Data System (QA.WX) interface. The main window title is "Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]". The interface includes a menu bar (File, Window, Help) and a toolbar with icons for Project, Reports, and Maintenance. The "Project Details" tab is selected, showing fields for Local Agency (100 - Commerce), CDM Project# (100-25294), Agency Project# (987), Project Status (Active), Status Date (12/10/2011), Last Updated By (Danielle Sacks), Last Updated Date (12/21/2011 15:03:55), and Electricity Utility. Below this is a "Select a Building" section with a table listing building details.

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2				12/10/2011		

Below the building selection is the "Details for the Selected Building Above" section, with the "Building Milestones" sub-tab selected. This sub-tab contains a table of milestones:

Building Status	Milestone	Effective Date	Comments
Active	* Audit completed	12/10/2011	
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews as...		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed	12/15/2011	

A callout box highlights the "Completed" row in the Building Milestones table, stating: "A date needs to be entered into the *Final Inspection passed* field on the *Project Details* tab, *Building Milestone* sub-tab before the project can be moved into the **Completed** status."



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After entering a *Final inspection passed* date on the *Building Milestone* tab, navigate to the *Validation* tab to view the information required to move the building from the **Active** status to the **Completed** status. The following pieces of information (with tab where that particular piece of information is located) are required to save the project as a **Completed** project: *Housing Status* (*Project Details* tab, *Basics/Characteristics* sub-tab), *Combustion Appliance* (*Project Details* tab, *Basics/Characteristics* sub-tab), *Construction Funding Type* (*Project Details* tab, *Basics/Characteristics* sub-tab), *Meter Type* (*Project Details* tab, *Basics/Characteristics* sub-tab), *Primary Heat Source* (*Project Details* tab, *Basics/Characteristics* sub-tab), *Year Built* (*Project Details* tab, *Basics/Characteristics* sub-tab), *Audit Tool* (*Project Details* tab, *Audit* sub-tab), *Building Measures* (*Project Details* tab, *Measures* sub-tab), *Demographics Count Age Range - # People* (*Project Details* tab, *Demographics* sub-tab), *Demographics Count Age Range - # Units* (*Project Details* tab, *Demographics* sub-tab), *Demographic Count for Income Level # Units plus Not Weatherized* must match *Building Detail # of Units in Building* (*Project Details* tab, *Income Level # Units and Not Weatherized* located on *Demographics* sub-tab, *# of Units in Building* located on *Basics/Characteristics* sub-tab), and *Building Costs* (*Project Details* tab, *Costs* sub-tab).

**Validation Details**

Current Project Status:

Validate for this Status:

Validation Messages

Building#	Validation Message	Screen Location
1	At least one Building Measure with a Quantity greater than 0 is required	Project Details - Measures
1	Building Costs are required for each Building in a Multi-Family project.	Project Details - Costs
1	Combustion Appliance is required	Project Characteristics - Basics/Characteristics - Building Characteristics
1	Construction Funding Type is required	Project Characteristics - Basics/Characteristics - Building Characteristics
1	Demographic count for "Age Range - # People" required	Project Details - Demographics
1	Demographic count for "Age Range - # Units" required	Project Details - Demographics
1	Demographic count for "Income Level - # Units" plus "Not Weatherized" must match the Building Detail "# of Units"	Project Details - Demographics
1	Housing Status is required	Project Characteristics - Basics/Characteristics - Building Characteristics
1	Meter Type is required	Project Characteristics - Basics/Characteristics - Building Characteristics
1	Primary Heat Source is required	Project Details - Basics/Characteristics - Building Detail
1	Year Built is required	Project Details - Basics/Characteristics - Building Detail

The Validation tab lists the information required to move building into the **Completed** status.



All of the required data to move the building into the **Completed** status is the *Project Details* tab on various sub-tabs. The first sub-tab requiring data entry is the *Basics/Characteristics* sub-tab. The picture below displays all of the required fields on the *Project Details* tab, *Basics/Characteristics* sub-tab. *Housing Status*, *Combustion Appliance*, *Construction Funding Type*, and *Meter Type* are all located on the Building Characteristics grid. These four fields are all check boxes. The user should check one answer for each of these fields. *Primary Heat* and *Year Built* are both located under the Building Detail on the *Basics/Characteristics* sub-tab. The *Primary Heat* consists of two drop-down menus. Here, select the heat type and the heat provider from the drop-down menus. *Year Built* is a type-able field. The user should enter a 4-digit year in this field.

The screenshot shows the 'Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]' interface. The 'Project Detail' section includes fields for Local Agency (100 - Commerce), CDM Project# (100-25294), Agency Project# (987), Project Status (Active), Status Date (12/10/2011), Last Updated By (Danielle Sacks), Last Updated Date (12/21/2011 15:03:55), Project Notes, and Electricity Utility. Below this is a 'Select a Building' table with one entry: Bldg# 1, Bldg Name, Yr Built, # Units (2), Conditioned, Last Wx, # Measures, Audit (12/10/2011), Final Insp, and Building Cost.

The 'Details for the Selected Building Above' section has tabs for 'Basics/Characteristics', 'Audit', 'Building Milestones', 'Measures', 'Demographics', and 'Costs'. The 'Basics/Characteristics' tab is active, showing two sub-sections: 'Building Detail' and 'Building Characteristics'.

**Building Detail** fields include: Building# (1), Complex Name, Building Name, Parcel#, Building Type (MF 5+ Units), Street Address (1011 Plum St. SE), City/State/Zip (Olympia, WA, 98504), Primary Heat/Utility, Secondary Heat/Utility, Year Built, and Year Previously Weatherized.

**Building Characteristics** grid:

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliances	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
Construction Funding Type	<input type="checkbox"/> HFC
	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
	<input type="checkbox"/> None
Meter Type	<input type="checkbox"/> Master Metered
	<input type="checkbox"/> Individual Metered
Previously Weatherized	<input type="checkbox"/> Yes
	<input type="checkbox"/> No

Callouts in the image highlight that 'Primary Heat/Utility and Year Built are two required fields that are under the Building Detail section of the Basics/Characteristics sub-tab.' and that 'Housing Status, Combustion Appliances, Construction Funding Type, and Meter Type are fields that are required under the Building Characteristics section of the Basics/Characteristics sub-tab.'



Next, navigate to the Measures sub-tab. Enter at least one measure on this tab in order to remove this message from the Validation Messages table.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project - Reports - Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Active Project Notes:

COM Project#: 100-25294 Status Date: 12/10/2011

Agency Project#: 987 Last Updated By: Danielle Sacks

Is ARRA?: No Last Updated Date: 12/21/2011 15:03:55 Electricity Utility:

**Select a Building**

New Building Copy Building # to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2				12/10/2011		

The user needs to enter at least one measure on the Measures sub-tab in order to move the project from the Active to the Completed status.

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Measures Demographics Costs

Copy Selected Measure

Measure	Measure	Unit of Measure	Qty	R/U Value Chg	Comments	Wx
Baseload	Client Education	Yes=1				s1.0
	Efficient Lighting ...	Number				s1.0, s24.0
	Efficient lighting fi...	Number				s1.0, s23.0
	Water heater pip...	Number				s1.0, s16.1, s16...
	Water heater ins...	Number				s1.0, s15.2, s16...
	Water heater repl...	Number				s1.0, s16.3
	Water pipe insula...	Yes=1				s1.0, s15, s15.1, ...
	Refrigerator Repl...	Number				s1.0, s25.0, s25...
	Refrigerator Repl...	Number				s1.0, s25.0, s25...
	Showerheads	Number				s1.0, s22.1
	Faucet aerators	Number				s1.0, s22.1
	Other baseload	Specify				s1.0
Heating/Cooling ...	Heating system r...	Number				s1.0, s12.1, s12...
	Furnace cleaned ...	Number				s1.0, s12.1, s12...
	Heating system r...	Number				s1.0, s12.4
	Thermostat	Number				s1.0, s14, s14.1, ...
	Duct sealing	Yes=1				s1.0, s12.5, s13...
	Duct insulation	Yes=1				s1.0, s1.7, s13.1...
	Duct replacemen...	Yes=1				s1.0, s12.5, s13...
	Other heating-co...	Specify				s1.0
Envelope/Insulati...	Ceiling-attic insul...	sqft and change i...				s1.0, s5.1, s6.1, s...
	Knee Wall	sqft and change i...				s1.0, s1.7, s5.1, s...
	Wall insulation	sqft and change i...				s1.0, s1.7, s26.4...



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On the *Measures* tab, there is a column labeled *Unit of Measure* that informs the proper way of indicating that that particular measure was used in the weatherization of this building. For some measures, in order to display that this particular measure was used, the user has to enter a “1” into the *Qty* column. In this case, 1 represents “Yes” for “Yes, this measure was performed.” Other measures require that the user enter a quantity amount for how many of that particular measure were completed. Additionally, there are some measures that require the user to enter the square foot amount of the measure installed, as well as the R/U-value change. The R/U- value change amount should be entered into the *R/U Value Chg* column. This column allows data entry only when a particular measure requires an R/U-value change.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

Project Details | Contacts | Milestone/Status | Cost Summary | Validation | Attachments

**Project Detail**

Local Agency: 100 - Commerce | Project Status: Active | Project Notes:   
 COM Project#: 100-25294 | Status Date: 12/10/2011   
 Agency Project#: 987 | Last Updated By: Danielle Sacks   
 Is ARRA?: No | Last Updated Date: 12/21/2011 15:03:55 | Electricity Utility:   
 # to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2				12/10/2011		

**Details for the Selected Building Above**

Basics/Characteristics | Audit | Building Milestones | **Measures** | Demographics | Costs

Measure	Unit of Measure	Qty	R/U Value Chg	Comments	Wx
Refrigerator Repl...	Number				s1.0, s25.0, s25...
Showerheads	Number				s1.0, s22.1
Faucet aerators	Number				s1.0, s22.1
Other baseload	Specify				s1.0
Heating/Cooling ...	Number				
Furnace cleaned ...	Number				
Heating system r...	Number				
Thermostat	Number				
Duct sealing	Yes=1				s1.0, s12.5, s13...
Duct insulation	Yes=1				s1.0, s1.7, s13.1...
Duct replacemen...	Yes=1				s1.0, s12.5, s13...
Other heating-co...	Specify				s1.0
Envelope/Insulati...	sqft and change i...				s1.0 General Requirments
Knee Wall	sqft and change i...				s1.0, s1.7, s5.1, s...
Wall insulation	sqft and change i...				s1.0, s1.7, s26.4,...
Floor insulation	sqft and change i...				s1.0, s26.1, s8.0,...
Perimeter insulation	sqft and change i...				s1.0, s1.7, s5.1, s...
Priority air sealing	Yes=1				s1.0, s10.0, s3.0,...
Blower door assis...	Yes=1				s05.0, 4, s1.0, s1...
Weather strips-do...	Yes=1				s1.0, s22.1
Windows	sqft and change i...				s1.0, s17.0, s17,...
Doors	Number				s1.0, s18.0, s18,...
Other shell	Specify				s1.0

Some measures require the entry of a R/U Change Value, in addition to the quantity



The next sub-tab that requires data entry in order for the building to be moved into the **Completed** status is the *Demographics* sub-tab. On this sub-tab, indicate how many units were categorized in which income levels and how many people were served. Additionally, the user needs to indicate on this sub-tab the number of units that housed people within certain age ranges and how many people were in those ranges.

Category	Demographic Item	# Units	# People
Income Level	Under 75% of Poverty Level		
	75% - 100% of Poverty Level		
	101% - 125% of Poverty Level		
	126% - 200% of Poverty Level		
	Over 200% of Poverty Level		
	Unknown		
<b>Total # of Uni...</b>			
<b>Not Weatheri...</b>	Not Weatherized		
Age range	0-5		
	6-59		
	60+		
	Unknown		
<b>Total People ...</b>			
Other	Disabled		
	Native American		

In these fields, indicate how many units weatherized were in each Income Level.

If any units were not weatherized in a complex or building, indicate how many in this field.

In these fields, enter how many units housed people in each age range, as well as how many people in those age categories were served.

In these fields, indicate how many units housed any Disabled persons or Native American person and how many Disabled person or Native American persons were served.



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As only 66% of the people being served in the units need to be income qualified, data does not need to be collected about all the units in some Multi-Family projects. To indicate that information was not gathered about all of the units, there is an additional data entry fields to indicate how many units were not surveyed. This field, labeled *Unknown* allows the user to indicate that not all of the units were surveyed. Note the *Total # of Units Weatherized* field (which is automatically propagated based on the number of units entered into the different income ranges) needs to equal the total number of units in the building (located on the *Project Details* tab).

The screenshot shows the 'Demographics' tab in the Weatherization Information Data System. The table below represents the data entry fields:

Category	Demographic Item	# Units	# People
Income Level	Under 75% of Poverty Level		
	75% - 100% of Poverty Level		
	101% - 125% of Poverty Level		
	126% - 200% of Poverty Level		
	Over 200% of Poverty Level		
	Unknown		
<b>Total # of Uni...</b>			
<b>Not Weatheri...</b>	Not Weatherized		
Age range	0-5		
	6-59		
	60+		
	Unknown		
<b>Total People ...</b>			
Other	Disabled		
	Native American		

A tooltip is displayed over the 'Unknown' row in the 'Income Level' section, containing the text: "If there were units that did not have demographic data collected, enter how many of these units there were in this field."



Additionally, one of the validation messages from the Validation Messages table states that the *Total # of Units Weatherized* (which is a field that auto-fills with the sum of the number of units from the Income Level section of the *Demographics* tab and the *Not Weatherized* section of the *Demographics* tab) must equal the *# of Units in Building* field on the *Project Details* tab, *Basic/Characteristics* sub-tab. In a Multi-Family Project, if not all of the units were weatherized, the user needs to indicate how many units were not weatherized in the *Not Weatherized* field.

Weatherization Information Data System (QA.WX) - [Single Family Project Detail: 678]

File Window Help

Project Reports Maintenance

Project Details Contacts Measures Milestone/Status **Demographics** Costs Audit Validation Attachments

### Demographics

Category	Demographic Item	# Units	# People
Income Level	Under 75% of Poverty Level		
	75% - 100% of Poverty Level		
	101% - 125% of Poverty Level		
	126% - 200% of Poverty Level		
	Over 200% of Poverty Level		
	Unknown		
<b>Total # of Uni...</b>			
<b>Not Weatheri...</b>	Not Weatherized		
Age range	0-5		
	6-59		
	60+		
	Unknown		
<b>Total People ...</b>			
Other	Disabled		
	Native American		

The number of units in these two fields, combined, must equal the number of units entered on the *Project Details* tab.



The next sub-tab requiring data entry is the *Costs* sub-tab. Navigate to the *Costs* sub-tab, while still on the *Project Details* tab and enter building specific costs. Costs for each building must be entered before the entire project can be moved into the **Completed** status. However, at this point, it is not necessary for costs to be distributed to specific funding sources. If, at this point, the user does not know how the project costs will be distributed among funding sources, amounts can be entered into the *Unassigned* field. Any costs entered into this field will need to be distributed to specific funding sources before the project can be moved in to the **Closed** status.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Active Project Notes:

CDM Project#: 100-25294 Status Date: 12/10/2011

Agency Project#: 987 Last Updated By: Danielle Sacks

Is ARRA?: No Last Updated Date: 12/21/2011 15:03:55 Electricity Utility:

**Select a Building**

New Building Copy Building  # to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2				12/10/2011		

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Measures Demographics **Costs**

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total	Comments
ARRA -- America...						
BPA -- Bonneville...						
LIHEAP -- Low In...						
MMPW -- Match ...						
MMPR -- Match ...						
DOE -- Departme...						
SERC -- Sustaina...						
Local -- Local Ma...						
Owner -- Owner ...						
Other -- Other So...						
Unassigned -- Un...						
Totals	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

Enter cost information for each building on the *Costs* sub-tab.



Each of these fields needs to be entered for each, individual building before the entire project can be moved in the **Completed** status. Each building needs its own costs, demographics counts, measures, audit tool, year built, primary heat type and provider, and basic building characteristics added.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Active Project Notes:

CDM Project#: 100-25294 Status Date: 12/10/2011

Agency Project#: 987 Last Updated By: Danielle Sacks

Is ARRA?: No Last Updated Date: 12/21/2011 15:03:55 Electricity Utility:

**Select a Building**

# to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2					12/10/2011	

Each building listed here, on the *Project Details* tab, needs to be moved into the **Completed** status before the entire project can be moved into the **Completed** status.

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Measures Demographics Costs

**Building Detail**

Building#: 1 Complex Name:

Building Name:  Parcel#:

Building Type: MF 5+ Units

Street Address: 1011 Plum St. SE

City/State/Zip: Olympia WA 98504 +4

Primary Heat/Utility:

Secondary Heat/Utility:

Year Built:  Year Previously Weatherized:

# of Units in Building: 2 Conditioned SQFT:

Annual Heating Cost:  Total Energy Cost:

Description:

**Building Characteristics**

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliances	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
	<input type="checkbox"/> HFC
Construction Funding Type	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
Meter Type	<input type="checkbox"/> None
	<input type="checkbox"/> Master Metered
	<input type="checkbox"/> Individual Metered
Previously Weatherized	<input type="checkbox"/> Yes
	<input type="checkbox"/> No



## Moving a Multi-Family Project to the Completed Status

Once all of the required information has been entered to move each of the buildings to the **Completed** status, the entire project can be saved as **Completed**. Before the project is moved the new status, there is some information required on the project level. Once the project has been opened, navigate to the *Milestone/Status* tab and enter a date into *Final inspection passed* field in the *Effective Date* column.

**Project Status History**

Project Status	Effective Date	Entered By	Date Entered
Active	12/10/2011	Danielle Sacks	12/21/2011
Pre-Audit	12/21/2011	Danielle Sacks	12/21/2011

**Milestones**  
\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed	12/10/2011	
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed	12/15/2011	
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed		
Postponed	* Project postponed temporarily		
Permanently Def...	* Project permanently deferred		

To move the entire Multi-Family project into the **Completed** status, enter a date into the *Final inspection passed* field on the *Project Details* tab.



After entering a *Final inspection passed* date on the *Milestone/Status* tab, navigate to the *Validation* tab to view the information required to move the project from the **Active** status to the **Completed** status. The following information (with tab where that particular piece of information is located) is required in order to save the project as a **Completed** project: *Electricity Utility* (*Project Details* tab), *Contact* (*Contacts* tab), and *Contractor Contact* (*Contacts* tab).

**Validation Details**

Current Project Status:

Validate for this Status:

Validation Messages

Building#	Validation Message	Screen Location
Project	Contractor Contact is required	Contacts - Contact from your Organization
Project	Electricity Utility is required	Project Details - Project Detail
Project	Inspector Contact is required	Contacts - Contact from your Organization

The information listed here, in the Validation Messages table, is required on the project level in order to move the project into the **Completed** status.



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To enter the first piece of information required to move the entire project into the **Completed** status, navigate to the *Project Details* tab to enter the *Electricity Utility*. The *Electricity Utility* field is a drop-down field; choose a utility company from the list. Entering this piece of required information will remove this entry from the Validation Messages Table.

**Project Details**

Local Agency: 100 - Commerce  
COM Project#: 100-25294  
Agency Project#: 987  
Is ARRA?: No

Project Status: Active  
Status Date: 12/10/2011  
Last Updated By: Danielle Sacks  
Last Updated Date: 12/21/2011 15:03:55

Electricity Utility: [Dropdown]

**Select a Building**

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	Building Cost
1		1972	2			\$10,361.74

**Details for the Selected Building Above**

**Basics/Characteristics**

**Building Detail**

Building#: 1  
Building Name: [Text]  
Building Type: MF 5+ Units  
Street Address: 1011 Plum St. SE  
City/State/Zip: Olympia, WA, 98504 +4  
Primary Heat/Utility: Electric, Puget Sound Energy  
Secondary Heat/Utility: [Dropdown]  
Year Built: 1972  
# of Units in Building: 2  
Annual Heating Cost: [Text]  
Description: [Text Area]

**Building Characteristics**

Category	Characteristic
Housing Status	<input checked="" type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliances	<input type="checkbox"/> Yes
	<input checked="" type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Pract...
	<input type="checkbox"/> HFC
Construction Funding Type	<input type="checkbox"/> HTF
	<input checked="" type="checkbox"/> HUD
	<input type="checkbox"/> USDA
	<input type="checkbox"/> None
Meter Type	<input checked="" type="checkbox"/> Master Metered
	<input type="checkbox"/> Individual Metered
Previously Weatherized	<input type="checkbox"/> Yes
	<input type="checkbox"/> No



The next tab requiring information before the project can be moved into the **Completed** status is the *Contacts* tab. Assign an Inspector and a Contractor for the entire project. If there are multiple contractors and inspectors working on this Multi-Family project, enter all of the inspectors and contractors.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details **Contacts** Milestone/Status Cost Summary Validation Attachments

### Contacts from your Organization

Pick person from your Organization

Add to Contacts [Manage Organization Details...](#)

Contact Type	First Name	Cell#	Email Address	Organization	Comments
Auditor	Danielle		danielle.sacks@...		

An Inspector Contact and a Contractor Contact need to be added to the project's *Contacts* tab.

### Project Specific Contacts

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
Owner	Margaret	Thatcher							



To add a *Contractor Contact*, first add a contact from the *Contacts from your Organization* drop-down to the grid. Then use the *Contact Type* drop-down in order to choose “Contractor” from the list. The contact information for the person chosen is automatically filled into the rest of this grid by the application.

**Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]**

File Window Help

Project Reports Maintenance

Project Details **Contacts** Milestone/Status Cost Summary Validation Attachments

**Contacts from your Organization**

Pick person from your Organization

Add to Contacts

To add a Contractor Contact, first select a person from the Contacts from your Organization drop-down and then click

Contact Type	First Name	Last Name	Middle	Work#	Cell#	Email Address	Organization	Comments
Auditor	Danielle	Sacks		(360) 725-5007		danielle.sacks@...		
Contractor	Meredith	Angeli		(360) 725-2993		meredith.angeli@...		

Auditor  
Conservation Education Specialist  
**Contractor**  
Crew Chief  
Inspector  
Lead  
Monitor

Next, select 'Contractor' from the Contact Type drop-down.

**Project Specific Contacts**

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
Owner	Margaret	Thatcher							



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To add an *Inspector Contact*, first add a contact from the *Contacts from your Organization* drop-down to the grid. Then use the *Contact Type* drop-down in order to choose "Inspector" from the list. The contact information for the person chosen is automatically filled into the rest of this grid by the application. If a name of an inspector or contractor is missing from the *Contacts from your Organization* drop-down, the Security Administrator will need to add the contact.

**Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]**

File Window Help

Project Reports Maintenance

Project Details **Contacts** Milestone/Status Cost Summary Validation Attachments

**Contacts from your Organization**

Pick person from your Organization

Add to Contacts

To add an Inspector Contact, first select a person from the Contacts from your Organization drop-down and then click

Contact Type	First Name	Last Name	Middle	Work#	Cell#	Email Address	Organization	Comments
Auditor	Danielle	Sacks		(360) 725-5007		danielle.sacks@...		
Contractor	Meredith	Angeli		(360) 725-2993		meredith.angeli@...		
	Debby	Davies		(360) 725-2680		debby.davies@c...		

Auditor  
Conservation Education Specialist  
Contractor  
Crew Chief  
**Inspector**  
Lead  
Monitor

Next, select 'Inspector' from the Contact Type drop-down.

**Project Specific Contacts**

Contact Type	First Name	Last Name	Middle	Home#	Work#	Cell#	Email Address	Organization	Comments
Owner	Margaret	Thatcher							



After entering the contact information, navigate back to the *Validations* tab to verify that all of the validation messages have been cleared from the Validation Messages table. After saving, the Milestone/Status page should verify that the Multi-Family project has been moved into the **Completed** status.

The screenshot shows a web application window titled "Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]". The application has a menu bar with "File", "Window", and "Help". Below the menu bar are navigation tabs: "Project", "Reports", and "Maintenance". The "Validation" tab is selected and highlighted with a red box. The "Validation" tab contains a "Validation Details" section with two fields: "Current Project Status" and "Validate for this Status", both containing the value "Completed". The "Current Project Status" field is also highlighted with a red box. A text box with a white background and black border contains the text: "After entering all of the required information, navigating to the *Validation* tab will verify that the project has been moved into the **Completed** status." Below the "Validation Details" section is a "Validation Messages" table with three columns: "Building#", "Validation Message", and "Screen Location". The table is currently empty. The application has a standard Windows-style scrollbar at the bottom.



## Saving a Multi-Family Project in the Closed Status

After all payments on the project are made, the next step is to add information into WIDS in order to move the project into the **Closed** status. To open the specific project for editing, use the search field on the Project Browse screen to find the project and either double-click on the project or click the Edit button to open it.

Weatherization Information Data System (QA.WX) - [Project Browse]

File Window Help

Project Reports Maintenance

Project Type	Status	Status Date	Agency	Building#	# of Units	Building Address	Building Zip	Occupant	Owner Name	Agy Project#	COM Project#	Parcel#	Edit
Multi-Family	Pre-Audit	10/26/2011	Commerce	2	2	TESTing	98406			TEST	100-25230		
Single Family	Active	01/11/2011	Commerce		1	52	98406		angeli, meredith	123	100-25232	582-AZ86	
Single Family	Closed	01/03/2011	Commerce		1	Test 123	98406		TESTIN				
Single Family	Pre-Audit	11/15/2011	Commerce		1	456 Candyland La...	59605						
Single Family	Pre-Audit	11/15/2011	Commerce		1	5468 Cottage Rd	98506		Queue				
Multi-Family	Closed	06/21/2011	Commerce	1	2	Seven Dwarves Ln	97654		White, S				
Single Family	Active	05/18/2011	Commerce		1	Hollywood Blvd	99652		Dylan, Bob		100-25283		
Single Family	Completed	07/20/2011	Commerce		1	4876 Chester Cat ...	56872		Wonderland, Alice	1052	100-25277		
Multi-Family	Active	08/25/2011	Commerce	2	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Multi-Family	Active	08/25/2011	Commerce	1	2	137 Math Rd	85602		Turing, Alan	9965	100-25278		
Single Family	Permane...	06/05/2011	Commerce		1	111 Whitehouse A...	85723	Barack Obama	Obama, Michelle	556	100-25285		
Single Family	Pre-Audit	11/17/2011	Commerce		1	542 Commerce Ave	85602			885	100-25286		
Multi-Family	Pre-Audit	11/17/2011	Commerce	1	3	456 Sesame St.	98406			962	100-25287		
Multi-Family	Pre-Audit	11/17/2011	Commerce	2	3	456 Sesame St.	98406			962	100-25287		
Single Family	Active	11/15/2011	Commerce		1	123 AVE	98406		Sacks, Danielle	TESTING	100-25242		
Multi-Family	Active	11/15/2011	Commerce		2	411 N. Evergreen	98406		Smolov, Dan	555	100-25288		
Multi-Family	Active	11/15/2011	Commerce	1	1	555 Orange St	98504		Gecko, Sobe	888	100-25289		
Multi-Family	Active	11/15/2011	Commerce	2	1	555 Orange St	98504		Gecko, Sobe	888	100-25289		
Multi-Family	Closed	11/25/2011	Commerce	1	1	616 N. Anderson St.	98406		Smith, Susan	565	100-25290		
Single Family	Closed	12/21/2011	Commerce		1	320 N. Market St.	98532		Dole, Bob	678	100-25293		
Multi-Family	Active	12/10/2011	Commerce	1	2	1011 Plum St. SE	98504		Thatcher, Margaret	987	100-25294		

Totals 21 records

To open a saved project, highlight the project on the Project Browse screen and then click the Edit button at the top right of the screen.



Once the project has been opened, navigate to the *Milestone/Status* tab and enter a date into *Project Closed* field in the *Effective Date* column.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts **Milestone/Status** Cost Summary Validation Attachments

### Project Status History

Project Status	Effective Date	Entered By	Date Entered
Completed	12/15/2011	Danielle Sacks	12/21/2011
Active	12/10/2011	Danielle Sacks	12/21/2011
Pre-Audit	12/21/2011	Danielle Sacks	12/21/2011

### Milestones

\* Entering Effective Date for milestones with an asterisk will change the Project Status as indicated.

Building Status	Milestone	Effective Date	Comments
Pre-Audit	Intake (application)		
Pre-Audit	Qualified		
Pre-Audit	Audit scheduled		
Pre-Audit	Client received Conservation Education		
Pre-Audit	Assessment completed		
Active	* Audit completed	12/10/2011	
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews assigned		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed	12/15/2011	
Completed	All paperwork is signed and received		
Completed	Final payment		
Closed	* Project closed	12/21/2011	
Postponed	* Project postponed temporarily		
Permanently Def...	* Project permanently deferred		

To move the project into the **Closed** status, navigate to the project's *Milestone/Status* tab and enter a *Project closed* date.



After entering a date into the *Project Closed* field, navigate to the *Validation* tab to view the information required to move the project from the **Completed** status to the **Closed** status. The following information (with tab where that particular piece of information is located) is required in order to save the project as a **Closed** project: Unassigned Costs (*Costs* tab).

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary **Validation** Attachments

**Validation Details**

Current Project Status: Completed

Validate for this Status: Closed

Validation Messages

Building#	Validation Message	Screen Location
Project	Unassigned Costs are not allowed when moving the project to Closed status	Project Details - Costs

After entering a *Project closed* date, navigating to the *Validation* will inform the user if there are any unassigned costs remaining in the project.



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In order to move the project into the **Closed** status, any amounts originally entered and remaining in the *Unassigned* field on the *Costs* tab will need to be removed and amounts will need to be assigned to specific funding sources.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Completed Project Notes:

CDM Project#: 100-25294 Status Date: 12/15/2011

Agency Project#: 987 Last Updated By: Danielle Sacks

Is ARRA?: No Last Updated Date: 12/21/2011 17:10:32 Electricity Utility: Puget Sound Energy

**Select a Building**

New Building Copy Building # to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1		1972	2			5	12/10/2011	12/15/2011	\$10,361.74

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Measures Demographics **Costs**

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total	Comments
ARRA -- America...						
BPA -- Bonneville...						
LIHEAP -- Low In...	\$5,986.53				\$5,986.53	
MMPW -- Match ...						
MMPR -- Match ...						
DOE -- Departme...	\$4,375.21				\$4,375.21	
SERC -- Sustaina...						
Local -- Local Ma...						
Owner -- Owner ...						
Other -- Other So...						
Utility - Puget So...						
Unassigned -- Un...	\$100.00				\$100.00	
Totals	\$10,461.74	\$0.00	\$0.00	\$0.00	\$10,461.74	

Any costs entered into the *Unassigned* field will need to be reallocated to a specific funding source before the project can be moved into the **Closed** status.



After entering the required cost information, save the project and navigate back to the *Validation* tab. In order to save the project and move it into the **Closed** status, there should be no messages remaining in the Validation Messages Table. If there are no remaining messages, the project should have been moved into the **Closed** status. This will be displayed in the Validation Details table.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary **Validation** Attachments

**Validation Details**

Current Project Status: Closed

Validate for this Status: Closed

Validation Messages

Building#	Validation Message	Screen Location
-----------	--------------------	-----------------

After all required information for the Multi-Family project has been entered, navigating back to the *Validation* tab will verify that the project has been moved into the **Closed** status.



## Cost Summary Tab

The *Cost Summary* tab is available only on Multi-Family Projects. The *Cost Summary* tab provides a summary for all of the funds allocated in the individual building's *Costs* tabs. This tab is read-only.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status **Cost Summary** Validation Attachments

### Project Costs (Summary)

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total
ARRA -- America...					
BPA -- Bonneville...					
LIHEAP -- Low In...	\$5,986.53				\$5,986.53
MMPW -- Match ...					
MMPR -- Match ...					
DOE -- Departme...	\$4,375.21				\$4,375.21
SERC -- Sustaina...					
Local -- Local Ma...					
Owner -- Owner ...	\$100.00				\$100.00
Other -- Other So...					
Utility - Puget So...					
<b>Totals</b>	<b>\$10,461.74</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$10,461.74</b>

The cost information for all of the buildings in a Multi-Family project is summarized here, on the *Cost Summary* tab.

### Project Costs (Historical Snapshots)

Select Cost Snapshot to View: 12/21/2011 - Project Cost Total = \$10461.74 (Current)

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total	Comments
LIHEAP -- Low In...	\$5,986.53				\$5,986.53	
DOE -- Departme...	\$4,375.21				\$4,375.21	
Owner -- Owner ...	\$100.00				\$100.00	
<b>Totals</b>	<b>\$10,461.74</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$10,461.74</b>	



Another feature of the *Costs Summary* tab is the *Historical Snapshots* drop-down menu. If changes are made to the costs of a project, these changes are captured in this drop-down menu. These changes are available in the drop-down menu after the changes have been in the system for a 24-hour period. This tool is helpful to help track the changes that have been made to a project over time and how much is spent from various funding sources.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status **Cost Summary** Validation Attachments

### Project Costs (Summary)

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total
ARRA -- America...					
BPA -- Bonneville...					
LIHEAP -- Low In...	\$5,986.53				\$5,986.53
MMPW -- Match ...					
MMPR -- Match ...					
DOE -- Departme...	\$4,375.21				\$4,375.21
SERC -- Sustaina...					
Local -- Local Ma...					
Owner -- Owner ...	\$100.00				\$100.00
Other -- Other So...					
Utility - Puget So...					
<b>Totals</b>	<b>\$10,461.74</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$10,461.74</b>

### Project Costs (Historical Snapshots)

Select Cost Snapshot to View: 12/21/2011 - Project Cost Total = \$10461.74 (Current)

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total	Comments
LIHEAP -- Low In...	\$5,986.53				\$5,986.53	
DOE -- Departme...	\$4,375.21				\$4,375.21	
Owner -- Owner ...	\$100.00				\$100.00	
<b>Totals</b>	<b>\$10,461.74</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$10,461.74</b>	

The Project Costs (Historical Snapshots) table logs all of the changes that have been made to the *Cost Summary* tab, by changes being made to individual building *Costs* sub-tabs.



However, if changes are made to a building's *Costs* sub-tab after the project has already been closed, a comment is required in order to save the changes. The field for comments is located to the right of the Cost Total column on the *Costs* sub-tab.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 987]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Closed Project Notes:

CDM Project#: 100-25294 Status Date: 12/21/2011

Agency Project#: 987 Last Updated By: Danielle Sacks

Is ARRA?: No Last Updated Date: 12/21/2011 17:19:40 Electricity Utility: Puget Sound Energy

**Select a Building**

New Building Copy Building # to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1		1972	2			5	12/10/2011	12/15/2011	\$10,461.74

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Measures Demographics **Costs**

Funding Source	Wx Measures	H&S Measures	WRR Measures	Other	Total	Comments
ARRA -- America...						
BPA -- Bonneville...						
LIHEAP -- Low In...	\$5,986.53				\$5,986.53	
MMPW -- Match ...						
MMPR -- Match ...						
DOE -- Departme...	\$4,375.21				\$4,375.21	
SERC -- Sustaina...						
Local -- Local Ma...						
Owner -- Owner ...	\$100.00				\$100.00	
Other -- Other So...						
Utility - Puget So...						
Unassigned -- Un...						
<b>Totals</b>	\$10,461.74	\$0.00	\$0.00	\$0.00	\$10,461.74	

If changes to the costs of a building are made after the project has already been closed, then a comment of why changes were made are required, here, on that building's Costs tab.



## Adding Buildings to a Multi-Family Project

In order to add buildings to a Multi-Family Project, a valid project record must be created by entering all of the initial information required in order to save the project in the **Pre-Audit** status. After saving a Multi-Family project in the **Pre-Audit** status, individual building records can be added to the project record. There are two different way to add individual buildings to a project.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]

File Window Help

Project - Reports - Maintenance

Project Details | Contacts | Milestone/Status | Cost Summary | Validation | Attachments

**Project Detail**

Local Agency: 100 - Commerce      Project Status: Pre-Audit      Project Notes:

COM Project#: 100-25295      Status Date: 12/22/2011

Agency Project#: 879      Last Updated By: Danielle Sacks

Is ARRA?:       Last Updated Date: 12/22/2011 10:17:16      Electricity Utility:

**Select a Building**

# to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			1						

Before a user can add buildings to a Multi-Family project, the project must already be saved in the **Pre-Audit** status.

**Details for the Selected Building Above**

Basics/Characteristics | Audit | Building Milestones | Measures | Demographics | Costs

**Building Detail**

Building#: 1      Complex Name:

Building Name:       Parcel#:

Building Type: MF 2-4 Units

Street Address: 1029 Division St.

City/State/Zip: Tacoma WA 98406 +4

Primary Heat/Utility:

Secondary Heat/Utility:

Year Built:       Year Previously Weatherized:

# of Units in Building: 1      Conditioned SQFT:

Annual Heating Cost:       Total Energy Cost:

Description:

**Building Characteristics**

Category		Characteristic
Housing Status	<input type="checkbox"/>	Rental
	<input type="checkbox"/>	Owner Occupied
	<input type="checkbox"/>	Shelter
Combustion Appliances	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No
Other	<input type="checkbox"/>	Knob and Tube
	<input type="checkbox"/>	Historic Site
	<input type="checkbox"/>	Lead Safe Pract...
Construction Funding Type	<input type="checkbox"/>	HFC
	<input type="checkbox"/>	HTF
	<input type="checkbox"/>	HUD
	<input type="checkbox"/>	USDA
Meter Type	<input type="checkbox"/>	None
	<input type="checkbox"/>	Master Metered
Previously Weatherized	<input type="checkbox"/>	Individual Metered
	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No



The first way to add a building to a Multi-Family project is by creating a new building record. This method is desirable if the information in this new building record is different than the initial building record in the project. To add an entirely new building to Multi-Family project record, click on the New Building button. A new record will appear and will allow you the opportunity to enter new building information.

**Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]**

File Window Help

Project - Reports - Maintenance -

Project Details | Contacts | Milestone/Status | Cost Summary | Validation | Attachments

### Project Detail

Local Agency	100 - Commerce	Project Status	Pre-Audit	Project Notes	
COM Project#	100-25295	Status Date	12/22/2011		
Agency Project#	879	Last Updated By	Danielle Sacks		
Is ARRA?		Last Updated Date	12/22/2011 10:17:16	Electricity Utility	

### Select a Building

# to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			1						

If the building to be added is different than the initial building saved in the project, then creating a new building by clicking on the New Building button is the best option.

### Details for the Selected Building

**Basics/Characteristics** | **Audit**

#### Building Detail

Building#	1	Complex Name	
Building Name		Parcel#	
Building Type	MF 2-4 Units		
Street Address	1029 Division St.		
City/State/Zip	Tacoma	WA	98406 +4
Primary Heat/Utility			
Secondary Heat/Utility			
Year Built		Year Previously Weatherized	
# of Units in Building	1	Conditioned SQFT	
Annual Heating Cost		Total Energy Cost	
Description			

#### Building Characteristics

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliances	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
	<input type="checkbox"/> HFC
	<input type="checkbox"/> HTF
Construction Funding Type	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
	<input type="checkbox"/> None
	<input type="checkbox"/> Master Metered
Meter Type	<input type="checkbox"/> Individual Metered
	<input type="checkbox"/> Yes
Previously Weatherized	<input type="checkbox"/> No



After a new building has been created and saved with information entered into the yellow highlighted fields, it will be displayed in the Select a Building table. This table is where all of the individual building records for a project may be accessed.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Pre-Audit Project Notes:

CDM Project#: 100-25295 Status Date: 12/22/2011

Agency Project#: 879 Last Updated By: Danielle Sacks

Is ARRA?  Last Updated Date: 12/22/2011 10:17:16 Electricity Utility:

**Select a Building**

# to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						
6			5						

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Me

**Building Detail**

Building#: 1 Complex Name:

Building Name:  Parcel#:

Building Type: MF 2-4 Units

Street Address: 1029 Division St.

City/State/Zip: Tacoma WA 98406 +4

Primary Heat/Utility:

Secondary Heat/Utility:

Year Built:  Year Previously Weatherized:

# of Units in Building: 2 Conditioned SQFT:

Annual Heating Cost:  Total Energy Cost:

Description:

**Building Characteristics**

Category		Characteristic
Housing Status	<input type="checkbox"/>	Rental
	<input type="checkbox"/>	Owner Occupied
	<input type="checkbox"/>	Shelter
Combustion Appliances	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No
Other	<input type="checkbox"/>	Knob and Tube
	<input type="checkbox"/>	Historic Site
	<input type="checkbox"/>	Lead Safe Practi...
Construction Funding Type	<input type="checkbox"/>	HFC
	<input type="checkbox"/>	HTF
	<input type="checkbox"/>	HUD
	<input type="checkbox"/>	USDA
Meter Type	<input type="checkbox"/>	None
	<input type="checkbox"/>	Master Metered
Previously Weatherized	<input type="checkbox"/>	Individual Metered
	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No

After a building has been successfully added to the Multi-Family project, it will be displayed in the Select a Building table.



The second way to add a new building to a Multi-Family project is to copy an existing building record. This method is desirable if the new building being created has the same baseline information as an existing building record. To copy an existing building record, highlight the building in the Select a Building table that will provide the baseline information. Then, enter the number of copies desired in the blank field directly next to the Copy Building button and then click the Copy Building button.

**Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]**

Project Details | Contacts | Milestone/Status | Cost Summary | Validation | Attachments

**Project Detail**

Local Agency: 100 - Commerce | Project Status: Pre-Audit | Project Notes:

COM Project#: 100-25295 | Status Date: 12/22/2011

Agency Project#: 879 | Last Updated By: Danielle S... | Last Updated Date: 12/22/2011

Is ARRA?:

**Select a Building**

# to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						
6			5						

**Details for the Selected Building Above**

Basics/Characteristics | Audit | Building Milestones | Measures | Demographics | Costs

**Building Detail**

Building#: 1 | Complex Name:

Building Name:  | Parcel#:

Building Type: MF 2-4 Units | Street Address: 1029 Division St.

City/State/Zip: Tacoma WA 98406 +4

Primary Heat/Utility:  | Secondary Heat/Utility:

Year Built:  | Year Previously Weatherized:

# of Units in Building: 2 | Conditioned SQFT:

Annual Heating Cost:  | Total Energy Cost:

Description:

**Building Characteristics**

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliances	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
Construction Funding Type	<input type="checkbox"/> HFC
	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
Meter Type	<input type="checkbox"/> None
	<input type="checkbox"/> Master Metered
Previously Weatherized	<input type="checkbox"/> Individual Metered
	<input type="checkbox"/> Yes
	<input type="checkbox"/> No



Once the Copy Building button has been clicked, a message will pop up asking if the information entered is correct. If the information entered is correct, click 'Yes' to continue.

The screenshot shows the 'Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]' window. The 'Project Details' tab is active, showing fields for Local Agency (100 - Commerce), CDM Project# (100-25295), Agency Project# (879), Project Status (Pre-Audit), Status Date (12/22/2011), Last Updated By (Danielle Sacks), Last Updated Date (12/22/2011 10:17:16), and Electricity Utility. Below this is a 'Select a Building' section with a 'Copy Building' button and a table of buildings. The table has columns: Bldg#, Bldg Name, Yr Built, # Units, Conditioned, Last Wx, # Measures, Audit, Final Insp, and Building Cost. Two rows are visible: Bldg# 1 with 2 units and Bldg# 6 with 5 units. The 'Details for the Selected Building Above' section is open, showing the 'Building Detail' tab. The form includes fields for Building# (1), Building Name, Building Type (MF 2-4 Units), Street Address (1029 Division St), City/State/Zip (Tacoma, WA, 98), Year Built, # of Units in Building (2), and Annual Heating Cost. A 'Copy Building' dialog box is overlaid on the form, containing a question mark icon and the text: 'You are about to create 1 copies of Building# 1. Click Yes to continue or No to cancel.' The dialog has 'Yes' and 'No' buttons.

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						
6			5						

Category	Characteristic
	Historic Site
	Lead Safe Practi...
	HFC
	HTF
	HUDA
	None
	Master Metered
	Individual Metered
	Yes
	No



After clicking 'Yes,' another pop-up will appear. This pop-up informs the user of the action that was just taken by the application.

The screenshot shows the 'Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]' interface. The main window has a menu bar (File, Window, Help) and a toolbar with icons for Project, Reports, and Maintenance. Below the toolbar are tabs for Project Details, Contacts, Milestone/Status, Cost Summary, Validation, and Attachments. The 'Project Detail' section contains fields for Local Agency (100 - Commerce), COM Project# (100-25295), Agency Project# (879), Project Status (Pre-Audit), Status Date (12/22/2011), Last Updated By (Danielle Sacks), Last Updated Date (12/22/2011 10:17:16), and Electricity Utility. A 'Select a Building' section has 'New Building' and 'Copy Building' buttons. Below this is a table with columns: Bldg#, Bldg Name, Yr Built, # Units, Conditioned, Last Wx, # Measures, Audit, Final Insp, and Building Cost. The table contains three rows: (1, 2), (6, 5), and (1.1, 2). The 'Details for the Selected Building Above' section has tabs for Basics/Characteristics, Audit, Building Milestones, Measures, Demographics, and Costs. The 'Building Detail' section includes fields for Building# (1), Building Name, Building Type (MF 2-4 Units), Street Address (1029 Division St.), City/State/Zip (Tacoma, WA, 98406), Primary/Secondary Heat/Utility, Year Built, Year Previously Weatherized, # of Units in Building (2), Annual Heating Cost, and Description. The 'Building Characteristics' section is a table with columns for Category and Characteristic. A 'Building Copy' pop-up window is overlaid on the interface, displaying the message 'Building# 1 was copied 1 times!' and an 'OK' button.

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						
6			5						
1.1			2						

Category	Characteristic
	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
Construction Funding Type	<input type="checkbox"/> HFC
	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
	<input type="checkbox"/> None
Meter Type	<input type="checkbox"/> Master Metered
	<input type="checkbox"/> Individual Metered
Previously Weatherized	<input type="checkbox"/> Yes
	<input type="checkbox"/> No



After the user clicks ‘OK,’ the new building will be displayed in the Select a Building table. In order to identify the new building from the original, WIDS will have added “.1” to the building number of the original and entered that into the *Building#* field of the new building.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Pre-Audit Project Notes:   
 CDM Project#: 100-25295 Status Date: 12/22/2011   
 Agency Project#: 879 Last Updated By: Danielle Sacks   
 Is ARRA? [ ] Last Updated Date: 12/22/2011 10:17:16 Electricity Utility: [ ]

**Select a Building**

New Building Copy Building [ ] # to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						
6			5						
1.1			2						

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Measures Demog

**Building Detail**

Building#: 1.1 Complex Name: [ ]   
 Building Name: [ ] Parcel#: [ ]   
 Building Type: MF 2-4 Units   
 Street Address: 1029 Division St.   
 City/State/Zip: Tacoma WA 98406 +4 [ ]   
 Primary Heat/Utility: [ ]   
 Secondary Heat/Utility: [ ]   
 Year Built: [ ] Year Previously Weatherized: [ ]   
 # of Units in Building: 2 Conditioned SQFT: [ ]   
 Annual Heating Cost: [ ] Total Energy Cost: [ ]   
 Description: [ ]

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliances	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
	<input type="checkbox"/> HFC
Construction Funding Type	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
Meter Type	<input type="checkbox"/> None
	<input type="checkbox"/> Master Metered
	<input type="checkbox"/> Individual Metered
Previously Weatherized	<input type="checkbox"/> Yes
	<input type="checkbox"/> No

The newly created building will be listed in the Select a Building table.



To make changes to buildings, click on the building record in the Select a building table. Be certain to save a record before switching to a new building record, otherwise any changes made will not be saved.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce  
 COM Project#: 100-25295  
 Agency Project#: 879  
 Is ARRA?:

Project Notes:

Electricity Utility:

**Select a Building**

New Building Copy Building # to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						
6			5						
1.1			2						

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Measures Demographics Costs

**Building Detail**

Building#: 2 Complex Name:

Building Name:  Parcel#:

Building Type: MF 2-4 Units

Street Address: 1029 Division St.

City/State/Zip: Tacoma WA 98406 +4

Primary Heat/Utility:

Secondary Heat/Utility:

Year Built:  Year Previously Weatherized:

# of Units in Building: 2 Conditioned SQFT:

Annual Heating Cost:  Total Energy Cost:

Description:

**Building Characteristics**

Category	Characteristic
Housing Status	<input type="checkbox"/> Rental
	<input type="checkbox"/> Owner Occupied
	<input type="checkbox"/> Shelter
Combustion Appliances	<input type="checkbox"/> Yes
	<input type="checkbox"/> No
Other	<input type="checkbox"/> Knob and Tube
	<input type="checkbox"/> Historic Site
	<input type="checkbox"/> Lead Safe Practi...
Construction Funding Type	<input type="checkbox"/> HFC
	<input type="checkbox"/> HTF
	<input type="checkbox"/> HUD
	<input type="checkbox"/> USDA
Meter Type	<input type="checkbox"/> None
	<input type="checkbox"/> Master Metered
Previously Weatherized	<input type="checkbox"/> Individual Metered
	<input type="checkbox"/> Yes
	<input type="checkbox"/> No



Each building created will have its own set of sub-tabs.

Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Pre-Audit Project Notes:

CDM Project#: 100-25295 Status Date: 12/22/2011

Agency Project#: 879 Last Updated By: Danielle Sacks

Is ARRA?  Last Updated Date: 12/22/2011 10:17:16 Electricity Utility:

**Select a Building**

# to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						
6			5						
1.1			2						

**Details for the Selected Building Above**

Basics/Characteristics Audit Building Milestones Measures Demographics Costs

**Building Detail**

Building#: 2 Complex Name:

Building Name:  Parcel#:

Building Type: MF 2-4 Units

Street Address: 1029 Division St.

City/State/Zip: Tacoma WA 98406 +4

Primary Heat/Utility:

Secondary Heat/Utility:

Year Built:  Year Previously Weatherized:

# of Units in Building: 2 Conditioned SQFT:

Annual Heating Cost:  Total Energy Cost:

Description:

Each building will have its own set of sub-tabs and its own set of required information.

Category		Characteristic
Housing Status	<input type="checkbox"/>	Rental
	<input type="checkbox"/>	Owner Occupied
	<input type="checkbox"/>	Shelter
Combustion Appliances	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No
Other	<input type="checkbox"/>	Knob and Tube
	<input type="checkbox"/>	Historic Site
	<input type="checkbox"/>	Lead Safe Practi...
	<input type="checkbox"/>	HFC
Construction Funding Type	<input type="checkbox"/>	HTF
	<input type="checkbox"/>	HUD
	<input type="checkbox"/>	USDA
	<input type="checkbox"/>	None
Meter Type	<input type="checkbox"/>	Master Metered
	<input type="checkbox"/>	Individual Metered
Previously Weatherized	<input type="checkbox"/>	Yes
	<input type="checkbox"/>	No



# Department of Commerce

Innovation is in our nature.

Additionally, each building will require its own *Audit completed* date and *Final Inspection passed* date. All buildings will need an Audit date added before the entire project can be moved into the **Active** status. Also, each building will need to have a Final Inspection passed date added before the entire project can be moved into the **Completed** status.

**Weatherization Information Data System (QA.WX) - [Multi-Family Project Detail: 879]**

File Window Help

Project Reports Maintenance

Project Details Contacts Milestone/Status Cost Summary Validation Attachments

**Project Detail**

Local Agency: 100 - Commerce Project Status: Pre-Audit Project Notes:

CDM Project#: 100-25295 Status Date: 12/22/2011

Agency Project#: 879 Last Updated By: Danielle Sacks

Is ARRA?  Last Updated Date: 12/22/2011 10:17:16 Electricity Utility:

**Select a Building**

New Building Copy Building  # to create

Bldg#	Bldg Name	Yr Built	# Units	Conditioned	Last Wx	# Measures	Audit	Final Insp	Building Cost
1			2						
6			5						
1.1			2						

**Details for the Selected Building Above**

Basics/Characteristics Audit **Building Milestones** Measures Demographics Costs

Building Status	Milestone	Effective Date	Comments
Active	* Audit completed		
Active	Supporting documentation is compiled		
Active	Statement of work completed		
Active	Contracts signed/Contractors and crews as...		
Active	Work begins		
Active	SERC Measures completed		
Active	Work completed		
Active	Final Inspection Failed		
Completed	* Final inspection passed		

Each building will need to have a date entered into the *Audit completed* field before the entire project can be moved in the **Active** status.

Additionally, each building will need to have a date entered into the *Final Inspection passed* field before the entire project can be moved into the **Completed** status.