Weatherization Assistant Version 8.9: Getting Started Guideline
Updated: February 17, 2012

This guideline outlines the initial steps you should follow after Version 8.9 of the Weatherization Assistant has been installed for the first time to set up your agency and configure the Setup and Supply Libraries. For new users of the Weatherization Assistant, this guideline also outlines how you can create a client and start an audit for that client. The document "Weatherization Assistant Version 8.9: Downloading and Installation Instructions" should be consulted for guidance on how to obtain and install the latest release of the Weatherization Assistant. Information presented in both of these documents is also available in a web-based format (see "Accessing Web-Based Training " at the end of this document).

ENTER THE INSTALLATION ID

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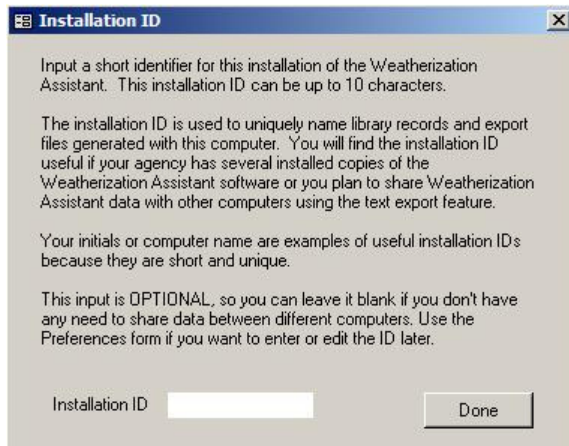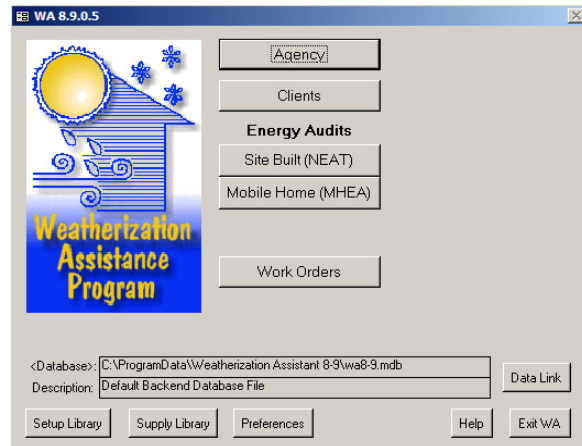

Figure 1. The Installation ID form.

Figure 2. The Weatherization Assistant's Main Menu.

INITIALIZE YOUR AGENCY INFORMATION

2. From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Agency" button to display the Agency Information form under the Agency window (see Fig. 3). Then do the following (see Chapter 5.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):

    A. If the name shown in the Agency Name field is not "Your Agency", use the combo box in the "Agency" record navigation block in the lower left corner of the Agency Information form to call up the agency with the name "Your Agency".

    B. Change the Agency Name from "Your Agency" to the actual name of your agency (the full name or perhaps an acronym). For example, Oak Ridge National Laboratory or ORNL. If there are multiple installations of the Weatherization Assistant on different computers within your agency, we recommend that you add a dash ("-") after the agency name you entered followed by the Installation ID you entered in Step 1 (e.g., ORNL - MPT).

    C. Change the State from "US" to your state using the combo box in the State field.

    D. Although not absolutely necessary, we recommend that you change the Agency Type from "Other" to the type that best describes your agency using the combo box in the Agency Type field and delete the "Agency comment" from the Comment field.

    E. Make sure the check box in front of "Default agency to associate with new Client, Work Order, ..." is checked.

Figure 3. The Agency Information form under the Agency window.

3.   While still under the Agency window, select the "Contacts" tab to display the Contacts form (see Fig. 4). Then do the following (see Chapter 5.2 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):

A.   Enter your name in the Contact Name field. Following this entry, make sure that the Name Detail fields correctly identify your First, MI (if you entered it), and Last name.

B.   Enter an abbreviated name, possibly your initials, first, or last name, in the User Name field and make sure the Active check box is checked.

C.   Enter your agency name in the Company field. You may have additional Agency Contacts if you desire. If an Agency Contact is associated with a material supplier, the Company field would be the name of the company which supplies the material.

D.   If any of the check boxes at the left center of the form apply to you, select them. An Agency Contact designated as an "Auditor" can be assigned responsibility for audits (see Step 13B).

E.   If you want to use the Weatherization Assistant's password feature to restrict who can open the software, select the "Change LogOn Group and Password" button. Select the "Admin" User Group and enter and confirm a password. Leave the "Confirm Old Password" field blank. Select the "Apply New Password" button (see Chapter 11.4 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details).

F.   Additional agency contacts may be entered by choosing the "New" button in the "Agency Contact" record navigation block then repeating steps A-E.

Figure 4. The Contacts form under the Agency window.

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

NAME YOUR SUPPLY LIBRARY

5.   From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Supply Library" button to display the General Information form under the Supply Library window (see Fig. 5). Then do the following (see Chapter 10.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):

     A.   If the name shown in the Supply Name field is not "Your Supply Library", use the combo box in the "Supply" record navigation block in the lower left corner of the General Information form to call up "Your Supply Library".

     B.   Rename the Supply Name from "Your Supply Library" to something more recognizable to you. We recommend that you enter the acronym of your agency in front of "Supply Library" (e.g., ORNL Supply Library). If you have more than one installation of the software within your agency, we recommend that you also use the Installation ID in the name (e.g., ORNL Supply Library - MPT).

     C.   Make sure the name of your agency (as named in Step 2) is listed in the Agency field. If not, use the combo box in the Agency field to select your agency.

Figure 5. The General Information form under the Supply Library window.

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

NAME YOUR SETUP LIBRARY

7.　From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Setup Library" button to display the Setup Library Information form under the Setup Library window (see Fig. 6). Then do the following (see Chapter 9.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):

　A.　If the name shown in the Library Name field is not "Your Setup Library", use the combo box in the "Setup Library" record navigation block in the lower left corner of the Setup Library Information form to call up "Your Setup Library".

　B.　Rename the Library Name from "Your Setup Library" to something more recognizable to you. We recommend that you enter the acronym of your agency in front of "Setup Library" (e.g., ORNL Setup Library). If you have more than one installation of the software within your agency, we recommend that you also use the Installation ID in the name (e.g., ORNL Setup Library - MPT).

　C.　Make sure the name of your agency (as named in Step 2) is listed in the Agency field. If not, use the combo box in the Agency field to select your agency.

　D.　Make sure the name of your supply library (as named in Step 5) is listed in the Supply Library field. If not, use the combo box in the Supply Library field to select your supply library.

Figure 6. The Setup Library Information form under the Setup Library window.

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

POPULATE THE SUPPLY AND SETUP LIBRARIES

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

If this is your first use of the Weatherization Assistant, it may take up to a week to compile the required information and then a day to enter it into the Weatherization Assistant. If you used a previous version of the Weatherization Assistant (e.g., Version 8.6.0.4), it may take less than a day for you to manually reenter the data from the previous version into Version 8.9, although now might be a good time to take an extra day to update the information. If you were using a previous version of the Weatherization Assistant, you can easily print out all the measure costs you had entered in the Setup Library by selecting the "Setup Library" button from the Weatherization Assistant's Main Menu (see Fig. 2) in the previous version to display the Setup Library Information form under the Setup Library window (see Fig.6), choosing the Library Measure Costs report using the combo box in the "Report" block in the lower right corner of the Setup Library Information form, and selecting the "Print" button in the "Report" block.

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

10.   From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Supply Library" button to display the General Information form under the Supply Library window (see Fig. 5). Then do the following (see Chapter 10 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):
    A.   Ensure that the Supply Name is the name of your supply library that you named and assigned to your agency in Step 5. If it isn't, use the combo box in the "Supply" record navigation block in the lower left corner of the General Information form to call up your supply library.

B.   If you plan on replacing refrigerators or water heaters, enter the replacement models you will use by selecting the "Refrigerator" or "Hot Water Equipment" tabs (see Chapter 10.3 of "The Weatherization Assistant User Manual for Administrative Features" for additional details).

C.   If you plan on using the Weatherization Assistant's optional work order feature, you may want to populate the Supply Library with common materials using the tabs shown on the Supply Library window (e.g., Insulation, Lighting).

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

CREATE A CLIENT AND AUDIT

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

11.   From the Weatherization Assistant's Main Menu (see Fig. 2), select the "Clients" button to display the Client Information form under the Client window (see Fig. 7). ***Do not be alarmed that a previously defined client is displayed. Do not type over any information for an existing client.*** Do the following (see Chapter 6.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):

A.   Initiate a new client by clicking on the "New" button in the "Client" record navigation block in the lower left corner of the Client Information form. This will automatically present you with a blank client form assigned to your agency.

B.   Change the Client ID from the default ID the Weatherization Assistant created for this new client (e.g., "Client (xx)") to an ID your agency uses for the new client, normally a job number (e.g., ORNL 2012-001).

C.   Make sure the name of your agency (as named in Step 2) is listed in the Agency field. If not, use the combo box in the Agency field to select your agency.

D.   Select the correct Dwelling Type for the client using the combo box in the Dwelling Type field.

E.   Although not absolutely necessary, we recommend that you enter the number of occupants in this house in the Number of Occupants field because NEAT and MHEA will use this value instead of a default value in their calculations.

F.   Enter any other information you desire for your new client in the other fields on this form.

Figure 7. The Client Information form under the Client window.

12. While still under the Client window, select the "Contacts" tab to display the Contacts form (see Fig. 8). Then do the following (see Chapter 6.4 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):

A. Enter the name of the client (i.e., the name of the person who applied for weatherization services) in the Full Name field. Make sure that the "Name Detail" fields correctly identify the "First," "MI" and "Last" name.

B. Check the "Primary Applicant" check box.

C. Ensure that the Contact Type is "Applicant/Person of Record". If not, use the combo box in the Contact Type field to select "Applicant/Person of Record."

D. Enter any other information you desire for the client using the fields on this form. If you had entered address information for the client on the Client Information form in Step 11G, and if this address is the same address for this contact, then you can use the "Copy Client Addr" button to copy this address to the Contacts form.

E. Additional client contacts may be entered by choosing the "New" button in the "Client Contact" record navigation block. However, only one contact per client should be declared a Primary Applicant with Contact Type of "Applicant/Person of Record." Choose any other appropriate Contact Type for subsequent contacts, e.g., "Other Contact for Applicant."

Figure 8. The Contacts form under the Client window.

Now that you have set up the client in the Weatherization Assistant, you are ready to describe the client's home in either of the audit programs (NEAT or MHEA), which will allow you to run the audit to develop a set of recommended energy measures. You may start a new audit from the Client window by following Step 13, or by returning to the Weatherization Assistant's Main Menu and selecting either the "Site Built (NEAT)" or "Mobile Home (MHEA)" buttons as outlined in Step 14. The advantage of following Step 13 and starting the audit from the Client window is that the Client ID is entered automatically, which eliminates a common error.

13.   While still under the Client window, select the "Audits" tab to display the Audits form (see Fig. 9), and then select either the "Create New Site Built (NEAT) Audit" or "Create New Mobile Home (MHEA) Audit" button depending on which audit is applicable for the client's house. This brings you to the Audit Information form under the NEAT or MHEA window (see Fig. 10). Then do the following (see Chapter 7.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):

Figure 9. The Audits form under the Client window.

A. The Client ID field will already be filled in, as will the Agency Name and Agency State fields using information entered for the selected client in Step 11.

B. Change the Audit Name from the default name NEAT or MHEA created for this new audit (e.g., "Audit (xx)") to a name conforming to the naming convention for clients and audits which you have developed. We recommend using the Client ID in the Audit Name. For example, for a client named "John Smith" with a Client ID of "ORNL 2012-001", you might use "ORNL 2012-001 Audit 1" as the Audit Name to signify that this is the first (and probably only) audit you are creating for this client. Some may wish to include the client's last name in the Audit Name, such as "Smith Audit 1". However, if you have more than one client with last name "Smith", you may find locating the correct audit by the Audit Name difficult. Others have been known to use an Audit Name referencing the client's street address.

C. Although not required, you may select the auditor to be assigned to this audit using the combo box in the Auditor field. If you selected yourself as an "Auditor" in Step 3D, you will be listed in this combo box.

D. Select the Setup, Fuel Cost, and Supply Libraries to be assigned to this audit using the combo boxes in the Setup Library, Fuel Cost Library, and Supply Library fields, respectively. The Supply and Setup Libraries will be those that you named in Steps 5 and 7, respectively, and populated with updated information in Steps 9 and 10. The Fuel Cost Library is a sub-library found in the Setup Library. You should have updated this Fuel Cost Library and possibly created a second one as part of the process of updating and populating the Setup Library in Step 9. If you have not created more than one Setup, Fuel Cost, or Supply Libraries for your agency, then these entries will automatically be selected for you.

E. Select a city close to the client that has similar weather to the client using the combo box in the Weather File field.

F. Enter audit data on the house in the remaining fields on the Audit Information form.

G. You may exit the NEAT or MHEA window (see Step 13H below) and return later to enter remaining house audit data under other tabs on the NEAT or MHEA window (e.g., Shell, Heating, Cooling, Ducts/Infiltration, Baseloads, and Itemized Costs), or you can enter all house data now.

H. When you are finished entering the audit data, you can run the audit by selecting the "Run Audit" button found in the upper right corner of each form under the NEAT or MHEA window. If you run the audit, a "Recommended Measures" report will be displayed. Exit this report using the "Close" button in the menu bar located at the top of the report.

I. Exit the NEAT or MHEA window using the X-box in the upper right corner of the NEAT or MHEA window (the X-box on the same row as "NEAT Audit" as shown in Fig. 10 or equivalently for MHEA) to return to the Weatherization Assistant's Main Menu.

Figure 10. The Audit Information form under the NEAT window.

14.   Picking up from the end of Step 12, do the following (see Chapter 7.1 of the "Weatherization Assistant Users Manual for Administrative Features" for additional details):

A.   Exit the Client window using the X-box in the upper right corner of the Client window (the X-box on the same row as "Client" as shown in Fig. 8) to return to the Weatherization Assistant's Main Menu.

B.   Select either the "Site Built (NEAT)" or "Mobile Home (MHEA)" buttons on the Weatherization Assistant's Main Menu (see Fig. 2), depending on which audit is applicable for the client's house, to display the Audit Information form under the NEAT or MHEA window (see Fig. 10). ***Do not be alarmed that a previously entered audit is displayed. Do not type over any information for an existing audit.***

C.   Initiate a new audit by clicking on the "New" button in the "Audit" record navigation block in the lower left corner of the Audit Information form. This will automatically present you with a blank audit form.

D.   Select the client for this audit using the combo box in the Client ID field. The client information must have been previously entered as outlined in Steps 11 and 12. Select "OK" if a warning box appears that says "This will assign the Audit to a new Client record." The Agency Name and Agency State fields will be automatically filled in using information entered for the selected client in Step 11.

C.   Continue with Steps 13A-I.

ACCESSING WEB-BASED TRAINING

A web-based training course on the Weatherization Assistant has been developed and made available over the Internet. The course covers all of the information presented in three days of on-site training provided to new users of the Weatherization Assistant, including the material in this document (see the "Getting started with the WA" module of the web-based training). To access the training, go to:

- "http://www.weatherizationassistanttraining.org"

If this is your first visit to the website, select the "REGISTER" hyperlink near the bottom of the page. This will lead you through a registration process. Once registered, use the LOGIN hyper-link to visit the training site as often as needed. There is no charge associated with use of this site.