

## ACE Wizard Assessor User Information

### Table of Contents

Access & Navigation .....	2
Creating a new Project / Inspection .....	5
Best order to complete an ACE Inspection .....	7
Time zones: .....	7
Add A/C Unit: .....	9
Add Chillers .....	12
Add AHU: .....	13
Add Chilled Water Pumps.....	14
Import A/C Units: .....	15
Room Sizing:.....	16
Maintenance Tab.....	18
TM44 Inspection Fields.....	19
Site Address Details .....	19
Site Details.....	21
Creating Sub Systems and Sub system inspection fields.....	22
Photographs .....	26
Recommendations .....	27
Executive Summary .....	30
Generated Text.....	31
Sections .....	32
Attachment .....	32
Import to Evolve.....	33
Other things to do in the ACE.....	34

## Access & Navigation

Access to ACE Wizard is available through a company specific sub domain URL, from www.acewizard.co.uk partner login page or through the standard ACE Wizard domain <https://system.acewizard.co.uk/Account/LogOn>. You will need a “Username / Partner Log In” and “Password” to access the system as shown.

When you first log in you will be asked to change your password, and enter an email address for password and user name recovery.

On Log in, the users will land on the “Inspection” page or “Your Inspections” page if you are the End Client and see all projects created by or relating to the user’s role specified in ACE Wizard.

*Note: the following image is taken from an assessor who is also administrator for an assessment firm, FM firm or Air Conditioning, these are known in ACE Wizard as the ACC COMP. The view shown is of an ACC COMP ADMIN user.*

The tabs displayed are;

- **Contact Us** – Can show the ACC COMP contact details the default is to show ACE Wizard Ltd contact details
- **Inspections** – Shows all inspections carried out by the assessor and is the landing page for assessors
- **Your Inspections** – Shows end client view of all projects created by the assessor
- **Maintenance** – Provides the end client and their maintenance firm with access to manage the site assets and f-gas records free for the first 12 months
- **Data Reports** – Run reports against all project data captured (End Client and ACC COMP)

ID	Client	Site	Inspected	Asse...	Type	Acc Comp	Sta...	Project	View	Edit
28175	Client ACME 1	Test	19/06/2020	Test	Level 3	ACME AC/FM Ltd	Open	Open	View Report	Edit
4152	Client ACME 1	Site E	12/07/2018	ACME Sub-Contractor	Level 3	ACME AC/FM Ltd	Open	Open	View Report	Edit
8628	Client ACME 1	Site A	29/07/2016	Inspector Energy	Level 3	ACME AC/FM Ltd	Closed	Open	View Report	Edit

- **Lookups** – Edit information displayed in the PDF report and to the end client online (ACC COMP Admin only). Here you will also find an easy AC units search tool, simply input the manufacturer and model number and if the system is in the database it will pull up the system data.

ACE WIZARD

Contact Us Inspections Your Inspections Data Reports Lookups Account

Search AC Units

AC Unit

Manufacturer  
Mitsubishi

Make/Model  
Mitsubishi PUHZ-P100VHA3

Unit Details

Manufacturer  
Mitsubishi

Model  
PUHZ-P100VHA3

System Type  
Single Split

Refrigerant  
R410A

Refrigerant Weight  
3.00

Additional Refrigerant Weight

Cooling Capacity  
10.00

Heating Capacity  
11.20

Energy Input Rating (kW)  
3.10

Energy Efficiency Ratio  
3.20

Part Load Capability:

Data Confirmed:

Copyright 2020. All Rights Reserved.

Throughout ACE, further information can be seen by clicking the “Expander Triangle” shown in the green circle to expand the visible information displayed to the user. The “Open” button is only shown to assessors and system administrators and opens the project to the assessor to create, modify or delete project information. The “Edit” button will allow the assessor to edit the top-level detail of the project without going in to the project fully. “View Report” opens a live view of the ACE PDF report in an easy to navigate webpage.

ACE (Air Conditioning Energy) Wizard - Project List

I..	Client	Site	Inspected	Asse...	Type	Acc Comp	Sta...	Project	View	Edit
19325	Client ACME 1	Site D	23/11/2018	Anthony Assessor	Level 4	ACME AC/FM Ltd	Open	Open	View Report	Edit
11787	Client ACME 1	Site B	14/09/2016	Anthony Assessor	Level 4	ACME AC/FM Ltd	Closed	Open	View Report	Edit

Copyright 2020. All Rights Reserved.

I..	Client	Site	Inspected	Asse...	Type	Acc Comp	Sta...	Project	View	Edit
19325	Client ACME 1	Site D	23/11/2018	Anthony Assessor	Level 4	ACME AC/FM Ltd	Open	Open	View Report	Edit
11787	Client ACME 1	Site B	14/09/2016	Anthony Assessor	Level 4	ACME AC/FM Ltd	Closed	Open	View Report	Edit

Recommendations Report PDFs (3) Report Summary **ACUS** AHUs Other Assets Rooms Time Zones Photos Site Details

**Totals**

- Cooling Capacity: 355.7kW
- Rated Input Power: 134.1kW
- Calculated Energy Input: 73.3kW
- Total Refrigerant Weight: 98.30kg
- Total Equivalent CO2: 181.8 tonne
- Annual Operating Cost: £39,503
- Number of Systems: 14
- Average EER: 2.7

**Details**

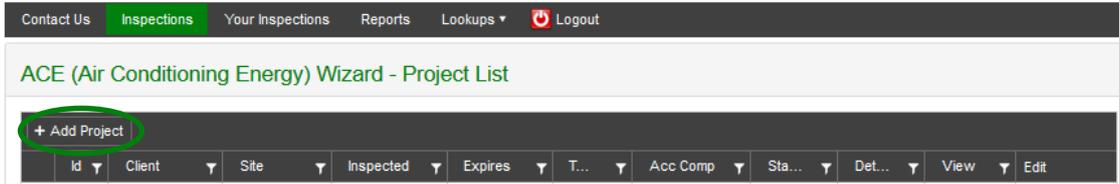
Asset ID	Unit Location	Area Served	Manufacturer/ Model	Output (kW)	Condition
01 Chiller	Chiller Compound	W/Wing Lecture Theatre and Meg Lab	York YCSA-100-T-3BOT	96	Reasonable

**Details** Energy Usage F-Gas Log Book PPM Records Internal Units

- Asset ID: 01 Chiller
- Unit Serial Number:
- Location: Chiller Compound
- Area Served: W/Wing Lecture Theatre and Meg Lab
- Make/Model: York YCSA-100-T-3BOT
- Linked to Time Zone: York Chiller
- System Type: Air Cooled Chiller
- Refrigerant: R407C
- Refrigerant Weight (kg): 55.00
- Additional Refrigerant Weight (kg): 0.00
- Total Refrigerant Weight (kg): 55.00
- GWP: 1774
- Output (kW): 96.0
- Approximate Age: 2000
- Condition: Reasonable
- Condition Additional Description: None
- In Service: True

## Creating a new Project / Inspection

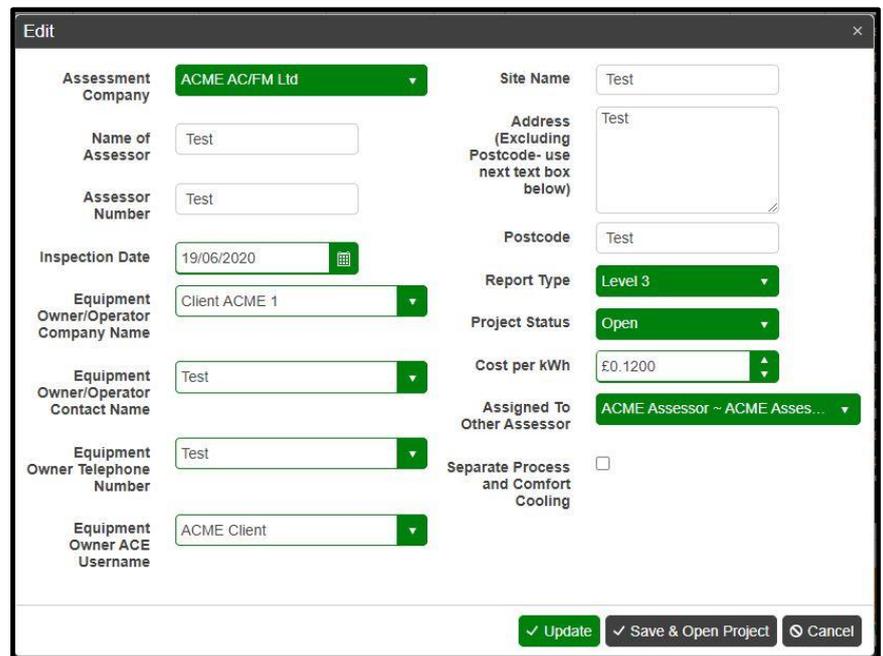
Click “Add Project” button to create a new site to be inspected



You will be presented with a screen asking you for client and building information, (See right) fill each box in accordingly.

When filling in the “Add/Edit Project” page, please note the following:

1. The “Assessment Company” the company who you are doing the work on behalf. By selecting an Assessment Company (ACC COMP), the ACC COMP logo, colour scheme, templates, stored data, appendix and front page will be inherited to the project. *Note: Assessors will only be able to select the ACC COMPs you have linked to.*
2. Selecting an ACC COMP will activate the Equipment Owner fields as end client data is linked to the ACC COMP
3. Name of Assessor is automatically filled in but can be overwritten
4. Assessor Number is currently a manual field
5. Inspection Date is the date of the site visit
6. Equipment Owner/Operator is intended to be the name of the company who is being inspected. (Not the name of the FM or AC company who may have sub-contracted the inspection to you)
7. The Contact Name and Contact number are linked to the Equipment Owner Company name to ensure consistency across assessors. The second field, “Contact Name” should be the name of the person responsible for overall control of the Air conditioning / Energy management for the client’s company. This name will be transferred into the Evolve and will display on the official DCLG certificate.
8. Contact email – The contact email address is used as the end client’s User Name to log in to ACE to see all their inspections. *Note: for portfolio work the contact email address will need to be the same for all projects relating to the same end client.*
9. Project status – The project can only be viewed by the end client if the project status is set to “Draft” or “Closed” *Note: On PDF creation and upload ACE will prompt to change the projects status.*
10. Separate Process and Comfort Cooling can be used if there are areas which have completely different process and comfort cooled areas served by separate systems, such as offices and a large server room. For larger more complex projects where process and comfort cooling are mixed, it may be easier to not separate process and comfort cooling and therefore this should be left unticked.



11. The remaining boxes do not need to be edited at this stage.
12. Click update to save the top-level project detail.

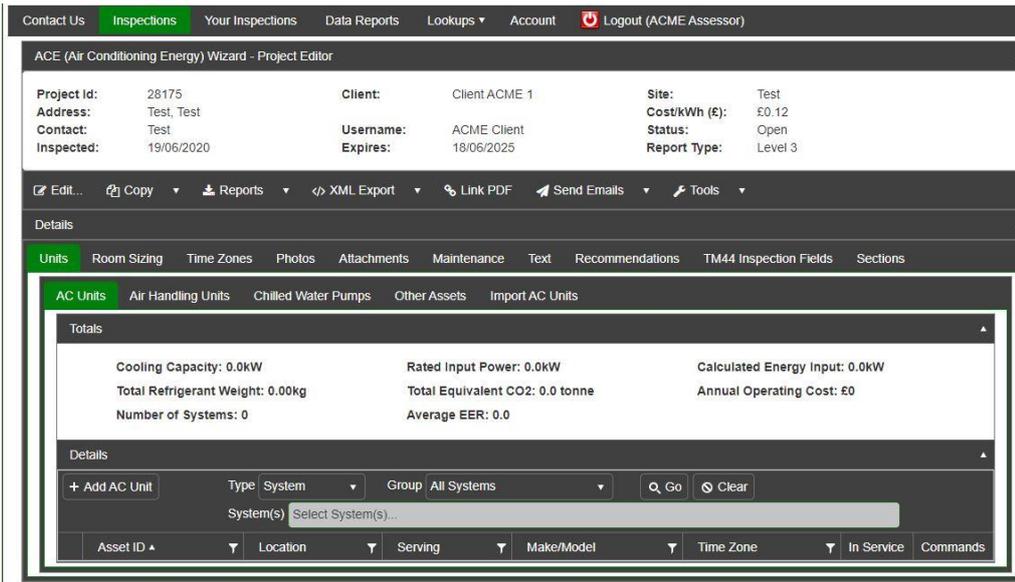
## Best order to complete an ACE Inspection

From the "Inspection" page enter the project by clicking the "Open" button



+	+	+	+	+	+	+	+	+	+	+	+	+
..	Client	Site	Inspected	Asse...	Type	Acc Comp	Sta...	Project	View	Edit		
28175	Client ACME 1	Test	19/06/2020	Test	Level 3	ACME AC/FM Ltd	Open	<b>Open</b>	View Report	Edit		

You are now in the project view and are ready to start adding information



ACE (Air Conditioning Energy) Wizard - Project Editor

Project Id: 28175    Client: Client ACME 1    Site: Test

Address: Test, Test    Username: ACME Client    Cost/kWh (£): £0.12

Contact: Test    Expires: 18/06/2025    Status: Open

Inspected: 19/06/2020    Report Type: Level 3

Details

Units    Room Sizing    Time Zones    Photos    Attachments    Maintenance    Text    Recommendations    TM44 Inspection Fields    Sections

AC Units    Air Handling Units    Chilled Water Pumps    Other Assets    Import AC Units

Totals

Cooling Capacity: 0.0KW	Rated Input Power: 0.0KW	Calculated Energy Input: 0.0KW
Total Refrigerant Weight: 0.00kg	Total Equivalent CO2: 0.0 tonne	Annual Operating Cost: £0
Number of Systems: 0	Average EER: 0.0	

Details

+ Add AC Unit    Type: System    Group: All Systems    Go    Clear

System(s) Select System(s)...

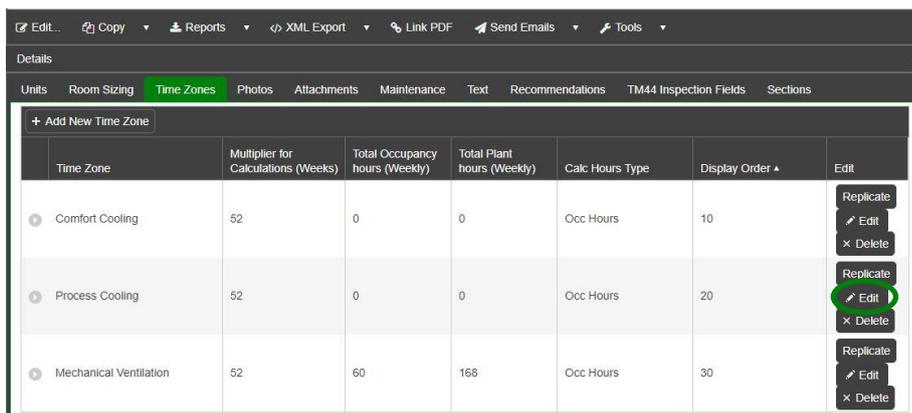
Asset ID	Location	Serving	Make/Model	Time Zone	In Service	Commands
----------	----------	---------	------------	-----------	------------	----------

Although you can complete an ACE Wizard project in any order the following is recommended until you are familiar with all fields and how the data captured in one part of the project impacts other area's;

**Time-zones, Add AC Units, Add AHUs, Add Chilled Water Pumps, Room Sizing, Maintenance, Photos, TM44 Inspection Fields, Recommendations, Evolve Export, and Attachments.**

### Time zones:

Three time zones are created by default and these will need editing to align with the site operating times. It's a good idea to fill out Time Zones first, create as many time zones as you require and delete any un-required time zones, for



Time Zone	Multiplier for Calculations (Weeks)	Total Occupancy hours (Weekly)	Total Plant hours (Weekly)	Calc Hours Type	Display Order	Edit
Comfort Cooling	52	0	0	Occ Hours	10	Replicate Edit Delete
Process Cooling	52	0	0	Occ Hours	20	<b>Replicate Edit Delete</b>
Mechanical Ventilation	52	60	168	Occ Hours	30	Replicate Edit Delete

example delete the time zone 'process cooling' if there are no process / server systems on site. *Note: We currently recommend setting a time zone up specifically for chillers to help ensure recommendation savings are more accurate.*

The "Edit" button allows you to edit the top-level details of the time zone.

Allowing you to change all elements of the time zone including the time zone name, *we would advise giving the time zone a name which helps the end user understand the report such as "Chiller Comfort Cooling"*

**Display order** - is the order the time zone will display in the PDF report table (Table 5 - Surplus Times Zones Schedules Costs) and is generally left at the default setting.

**Time zone multiplier** - This defaults to 52 weeks' operation as most systems are used for heating as well as cooling. You can reduce this to between 21 - 28 for cooling only systems. This will depend on which part of the country you are in and how warm the building gets. But it is unlikely that Mid - North Scotland will require cooling for more than 21 weeks a year, whereas Southern England will expect around 28 weeks of cooling to some level (Based on UK hours where the temperature is above 15°C). Process cooling systems, due to room heat gains from IT equipment are usually likely to be operating 52 weeks a year.

**Time Zone Type** - This field specifies if the Time Zone is set as a Comfort, Process or Mechanical Ventilation zone.

**Time zone calculation hours** - Choose to base the calculations in the report on either the occupancy hours of the building (Recommended if the client has not set timers on controllers) or plant set times (Recommended if timers are set on controls)

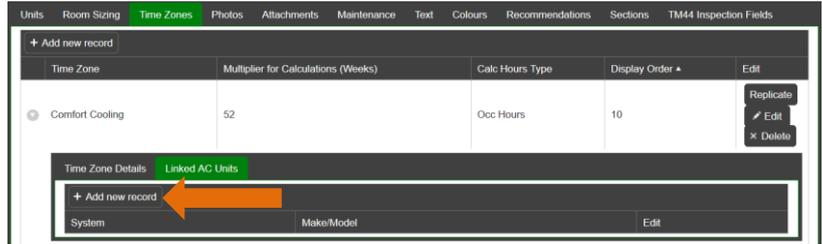
*Note: - There is no facility to allocate more than one time zone to a single AC external unit. For systems, such as VRVs which can have different hours set on multiple internal units, we recommend you set an average or the most common used or your best judgment to base the calculation on.*

Always keep mechanical ventilation as a separate time zone from cooling plants. And it is advised that process systems are also kept separate from comfort cooling systems.

You are now ready to add the scheduled hours using the "Expander Triangle" on the left-hand side, then click "Edit" for Monday. *Tip - You can set a whole week's time scheduling just by clicking on the edit button on Monday and checking the box "Set for entire week" or choosing "Monday - Friday" and click update.*

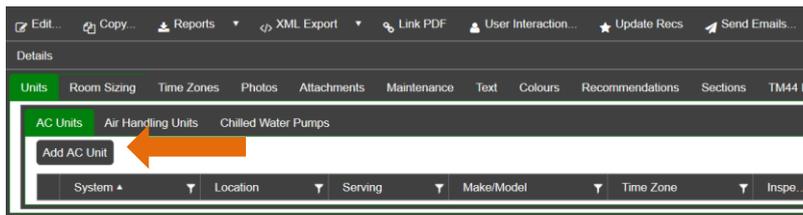
If you have already added an A/C system in to ACE, these systems can be linked to the time zone via the “Linked AC Units” tab and clicking “Add New Record”. All systems already capture in ACE will be visible for selection.

*Note – When adding an A/C unit these will be automatically added to the time zone selected as part of the A/C creation process and can be modified at the A/C level or the time zone level.*



**Add A/C Unit:**

Next build your asset list in this tab using the ACE Wizard system database.



The page is split in to “AC Unit” & “Unit Details” begin by populating the data on the left-hand side.

**System Name** – Please use a unique name for each system on a site such as the client’s asset label or AC01, AC02, AC03 etc.

**Location** – Is the area the external unit is sited

**Serving** – If a room already exists this can be selected via the drop down, if not, type the room name and this room will be automatically generated in ACE Room section with basic details.

**Manufacturer** – Start to type the manufacturer in the box and all possible selection options will appear based on the text typed. Alternatively, if you know the Model number, starting typing this in the **Make/Model** field. ACE will start to search our system database as you type. With approximately 13,000 systems and more being added weekly most systems will be in the ACE system database. Once selected the “Unit Details” section will populate with system data. *Note: If no system exists in the database then you can select any system and amend the “Unit Details” data on the right hand side manually.*

**Time Zone** – Select from the drop down list which is derived from the time zones already set up earlier.

**Approximate Age & Condition** – These are mandatory fields.

**Date Lookup** - Can be used where you may not have a known manufacture date of a system. If the system is in the database it will display a list of previously entered dates for that system which you can select from. If you would like to edit the date simply click “remove date”.

**Serial Number** – For inspected systems we advise entering the serial number here if known

**Server / Process Room** – This box will be automatically ticked if you have assigned the system to a “Process Cooling” time zone. You do have the ability to override and untick the box if needed.

**Add AC Unit**

**AC Unit**

Asset ID: AC 01

Location: roof

Area Served: server

Override for Sizing:

Manufacturer: Mitsubishi

Make/Model: Mitsubishi MUZ-GE25VA

Time Zone: Comfort Cooling

Approximate Install Year:

Condition: Good

Condition Additional Description: None

Serial Number: PU300DNSJ

In Service:

Server/Process Room:

**Unit Details**

Manufacturer: Mitsubishi

Model: MUZ-GE25VA

System Type: Single Split

Refrigerant: R410A

Refrigerant Weight: 0.80	Additional Refrigerant Weight: <input type="text"/>
Cooling Capacity (kW): 2.50	Heating Capacity (kW): 3.20
Cooling Input (kW): 0.50	Heating Input (kW): <input type="text"/>
Cooling EER: 4.60	Heating COP: <input type="text"/>
Cooling ESEER: <input type="text"/>	Heating ESCOP: <input type="text"/>

Part Load Capability:

Data Confirmed:

Submit for Review:

Capacity Control: Inverters

Capacity Control Description: The system is installed with inverter technology, this is more efficient than fixed speed systems as the inverter will modulate the speed of the compressor to match cooling load requirements.

As you enter an AC system if the data is in the database it will show in the “Unit Details” section on the right-hand side. These details can be edited allowing you to adjust the system details if they differ from on site. *Note: It is not a mandatory requirement to input any of the heating energy data. These details have been included for reference and are a part of the database.*

**Capacity Control** – ACE will automatically select the method of capacity control from the database and populate the description box with some descriptive text. This can be edited and there are various options within the drop-down menu. The data input here will be pulled through to the relevant cooling plant inspection field further in the report. *Note: “Part Load Capability” must be ticked for the text to be pulled through and for correct calculations to be applied throughout the report. If the database is incorrect and the system is not part load capable please untick this box.*

**Unit Details (Data Confirmed)** – Where new systems are found, the information provided by the assessors will be validated against manufacturer’s details by ACE Wizard, if data cannot be confirmed this box remains unticked and deems the information is based on the information captured only from the system on site and may not be accurate.

**Systems not in ACE Wizard database** – When adding systems which are not in the database, if you do not know the refrigerant weight for a system, you have the option to leave this field blank and a comment that will be generated in the ACE report below every relevant table stating;

*“As the refrigerant weight contained within “System” could not be established, it has been excluded from the total site refrigerant quantity calculation.”*

This comment will be inserted below every table containing refrigerant data. And similar comments will be made if you leave the other 2 fields blank (Cooling Capacity and Energy Input Rating). Try it for yourself to see how it works.

To complete a thorough report it is however always better if you can fill out all the fields and this can obviously be difficult to get all the data. Model numbers and your best friend “Google” can help work out cooling capacity and other system data.

*TIP - if you do not know the actual Energy Input Rating then a best guess approach will permit energy calculations to be made and help give the client a reasonable understanding of their operational costs.*

The following rules of thumb will help deduce the Energy Input Rating.

R410A systems - Aim for an EER (Energy Efficiency Ratio) of between 2.8 - 3.2 (So divide the cooling capacity by around 3, depending on size and age of the unit. Larger and older R410A systems are more likely to have the lower EER of around 2.8)

R407C & R22 - Aim for an EER (Energy Efficiency Ratio) of between 2.5 - 2.8 (So divide the cooling capacity by around 2.6, depending on size and age of the unit. Larger and older systems are more likely to have the lower EER of 2.5 - 2.6).

*If you have information on a system and you would like us to add it to the database or think we have something wrong in the database, please email us with the details at [support@acewizard.co.uk](mailto:support@acewizard.co.uk), or alternatively if you fill in the unit details and click “Submit for review” we will try our best to verify the data and then put the system in the database for future use.*

**Override for Sizing** – Ticking this box will bring up an additional field “Sizing Area” where you can assign the system to an existing area for sizing, this ensures that the system on the asset list correctly displays the area served but will also be included within the relevant sizing area for calculation purposes.

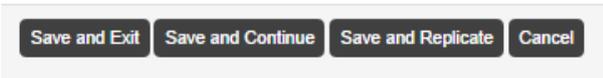
For example, a split system serving a “Meeting Room” which is also served partly by a main chiller serving “all areas”. In this case you would check the “Override for Sizing” box and enter the area served by the chiller, the system will now be included within the relevant area for calculations but will still display on the asset list as serving the “Meeting Room”.

See example on the right of how this will display on the asset list.

The screenshot shows the 'Edit AC Unit' interface. On the left, the 'AC Unit' section includes fields for Asset ID (AC 01), Location (roof), Area Served (Meeting Room), and 'Override for Sizing' (checked). Below this is the 'Sizing Area' dropdown menu, which is currently set to 'All Areas'. An orange arrow points from the text to this dropdown. Other fields include Manufacturer (Mitsubishi) and Make/Model. On the right, the 'Unit Details' section shows Manufacturer (Mitsubishi), Model (PUHZ-ZRP100VKA), System Type (Single Split), Refrigerant (R410A), Refrigerant Weight (5.00), and Additional Refrigerant Weight. Below the form is a table representing the asset list:

Asset ID	Location	Serving	Make/Model
01 Chiller	roof	All Areas	Carrier 30RBM-180
AC 01	roof	Meeting Room (All Areas)	Mitsubishi PUHZ-ZRP100VKA

You are now ready to save the system, if you have no more systems to add click “Save & Exit”, to enter a new system from scratch click “Save & Continue”, to enter a similar or identical system click Save & Replicate. Replicating will duplicate the AC unit and most of the references, remember to change the, condition, age, location or room served if you need to on this replicated system. You will also see when you replicate a system the “System” name has a suffix of “001”. This is to prevent a report ever having more than one system with the same name. We would advise changing the replicated system name to the next number in your own sequence such as “AC2” or use the client’s asset tag.



Once an asset list has been completed, at the top of the page you will see a search/filter system where you can filter the A/C systems by various categories such as time zone, area served, refrigerant type, manufacturer and more.

### Add Chillers

Chillers are added through the same process and steps as an A/C unit with known information imported into the “AC Unit Chiller Details” Section shown below. The detail of amending these sections will be covered with additional training.

**AC Unit**

Asset ID: 01 Chiller  
 Location: 2nd Floor Chiller Plant Room  
 Area Served: All Main Areas  
 Manufacturer: Airwell  
 Make/Model: Airwell CWP35ACO  
 Time Zone: Comfort Cooling  
 Condition: Select a condition...  
 Serial Number: EXAMPLE

**Unit Details**

Manufacturer: Airwell  
 Model: CWP35ACO  
 System Type: Remote Condenser Chiller  
 Refrigerant: R407C  
 Cooling Capacity (kW): 136.20  
 Heating Capacity (kW): 164.10  
 Cooling Input (kW): 35.90  
 Heating Input (kW): [ ]  
 Cooling EER: 3.80  
 Heating COP: [ ]  
 Cooling ESEER: [ ]  
 Heating ESCOP: [ ]

**AC Unit Chiller Details**

ESEER: 4.94  
 ESEER From Default:   
 Calculate ESEER From Default  
 ESEER Fouling Adjustment (3%/Annum): 0.00  
 Adjusted Base ESEER: 4.94  
 Chiller Type: Cooling Only  
 Annual Weeks Of Operation: 28.00  
 Calculate as standby only:   
 Calculate Part Loading From Default

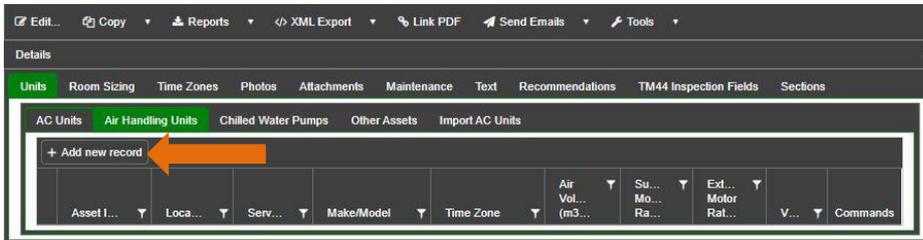
Part Load (%)	Part Load Energy Output Rating (kW)	Part Load Op %	Seasonal Average Cooling Duty (kW)
100	136.20	0.03	4.086
75	102.15	0.33	33.71
50	68.10	0.41	27.921
25	34.05	0.23	7.832
Cooling Duty Total (Sum of the above)			73.549
Seasonal average kW input (Cooling Duty/ESEER)			14.888
Adjusted Sizing kW input based on area sizing suitability			0.00
Adjusted Seasonal average kW input (Cooling Duty/ESEER)			14.888

Part Loading calculated from default values:

Buttons: Save and Exit, Save and Continue, Save and Replicate, Cancel

### Add AHU:

If there is mechanical ventilation at site, add this data next by selecting “Air Handling Units” and click “Add New Record”

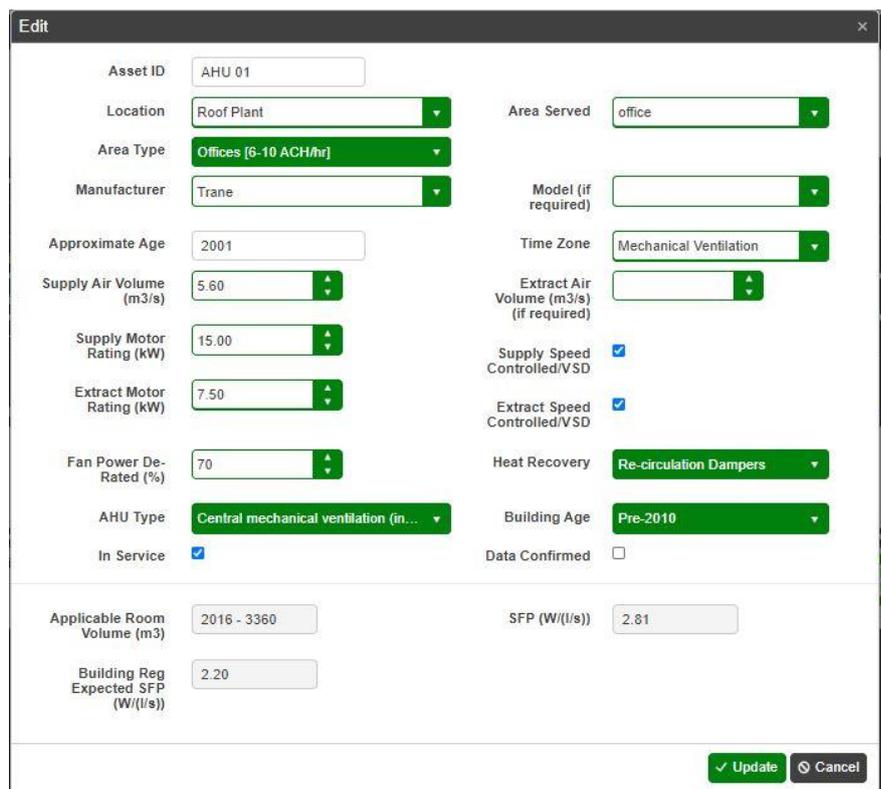


As with the A/C Unit please create a unique system name for each AHU system recorded, most fields are then completed manually.

Enter the area served and if a cooling plant serves the area it will be linked to that system, if not ACE will create a new area. Note: Do not size an area served by an AHU with no other cooling

The “Area Type” drop down menu has a list of the most common areas with the estimated required air changes per hour. Currently it is not possible to customise these figures and it is therefore best to select the option most similar to your requirement.

ACE has a small database of HRUs (Heat Recovery Units). Input the manufacturer and start typing the model number, for example; Manufacturer: Mitsubishi. Model: LGH-100RS2-E2, it will fill in the data for you.



*Note: Within AHU data there are certain fields that can be left blank which will mean certain “rule of thumb” comments will be generated at the end of relevant AHU tables in the ACE report.*

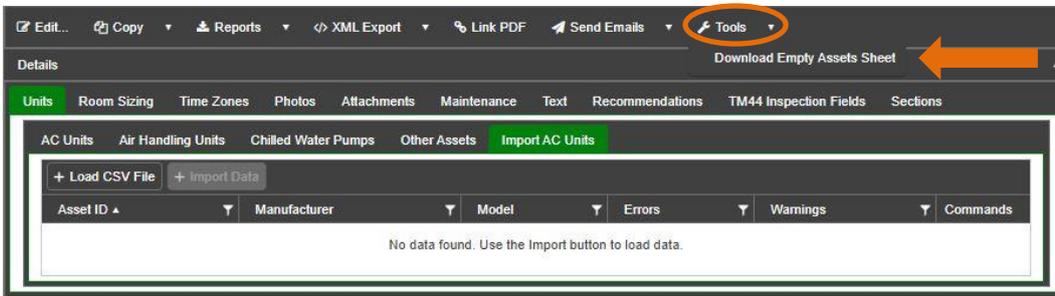
When adding an AHU, if the boxes labelled “Speed Controlled/VSD” (Variable Speed Drive) is ticked then you are indicating the system has a method of “Air Speed Control” on either the supply or extract motors. When this is ticked the cost to operate the AHU will be reduced by 30% in the ACE report to reflect modulation / lower speed settings.

## Add Chilled Water Pumps

There is also an option to add chilled water pumps into the ACE, this only takes a minute to do and will add another asset sheet table into the ACE. It is not mandatory to gather this information under TM44 methodology so you may choose not to fill this section out. In fact all it will do is generate an asset list in the ACE as we have not yet linked chilled water pumps into any calculations and presently you are not able to associate any operating costs with them or link them to recommendations to show cost savings.

### Import A/C Units:

Under the “Tools” tab you can download an empty asset list for excel. This can be used on mobile phones or tablets to enable the assessor to complete an asset list while on site, in some cases it may be quicker to complete the asset list during the site visit.



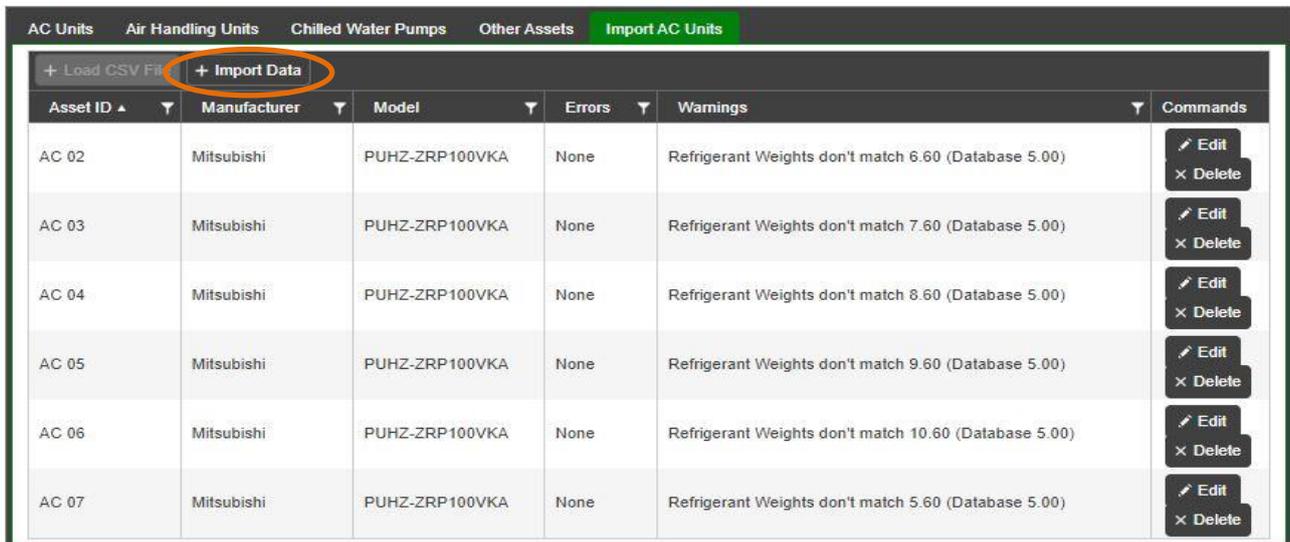
See completed example spreadsheet:

Asset ID	Location	Area Served	Manufacturer	Model	Serial	System Type	Year	Refrig Type	Refrig Wt	Add Ref Wt	Gen Cond	Coil Cond	Pipe Cond	In Service	Other Notes
AC 01	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	2233ZU000	Single Split	2001	R410A	5.6		Good	Good	Good	Yes	Leaves rear of coils
AC 02	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	2233ZU001	Single Split	2002	R410A	6.6		Good	Good	Good	Yes	Leaves rear of coils
AC 03	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	2233ZU002	Single Split	2003	R410A	7.6		Good	Good	Good	Yes	Leaves rear of coils
AC 04	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	2233ZU003	Single Split	2004	R410A	8.6		Good	Good	Good	Yes	Leaves rear of coils
AC 05	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	2233ZU004	Single Split	2005	R410A	9.6		Good	Good	Good	Yes	Leaves rear of coils
AC 06	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	2233ZU005	Single Split	2006	R410A	10.6		Good	Good	Good	Yes	Leaves rear of coils

Once the excel asset list has been completed save the asset list as a “.CSV” (CSV Comma Delimited) file on your computer. Next click “+ Load CSV File” in ACE under the Import AC Units tab, this will load the asset list and will display any errors or warnings you may have. From here you can edit the systems before importing into the project.



*Note: Any errors within the asset list must be corrected before you can import these systems. Warnings do not have to be amended; however, it is recommended that you double check these to ensure the data is correct. In the case below the refrigerant weights differ from the database figures.*



The screenshot shows the 'Import AC Units' tab with a table of imported units. The '+ Import Data' button is circled in orange. The table lists units AC 02 through AC 07, all from Mitsubishi. Each unit has a warning: 'Refrigerant Weights don't match [value] (Database 5.00)'. The values are 6.60, 7.60, 8.60, 9.60, and 10.60 respectively. Each row has 'Edit' and 'Delete' buttons.

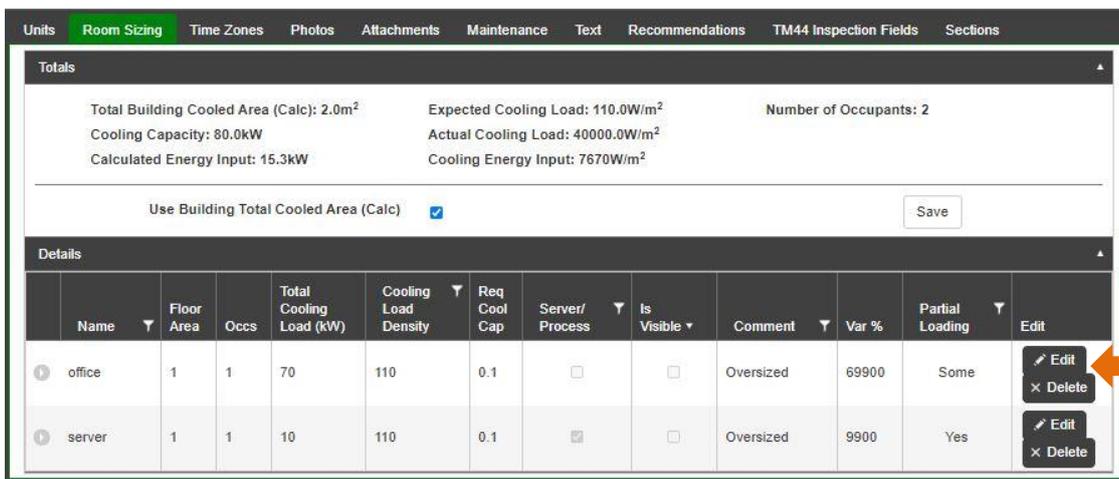
Asset ID	Manufacturer	Model	Errors	Warnings	Commands
AC 02	Mitsubishi	PUHZ-ZRP100VKA	None	Refrigerant Weights don't match 6.60 (Database 5.00)	Edit, Delete
AC 03	Mitsubishi	PUHZ-ZRP100VKA	None	Refrigerant Weights don't match 7.60 (Database 5.00)	Edit, Delete
AC 04	Mitsubishi	PUHZ-ZRP100VKA	None	Refrigerant Weights don't match 8.60 (Database 5.00)	Edit, Delete
AC 05	Mitsubishi	PUHZ-ZRP100VKA	None	Refrigerant Weights don't match 9.60 (Database 5.00)	Edit, Delete
AC 06	Mitsubishi	PUHZ-ZRP100VKA	None	Refrigerant Weights don't match 10.60 (Database 5.00)	Edit, Delete
AC 07	Mitsubishi	PUHZ-ZRP100VKA	None	Refrigerant Weights don't match 5.60 (Database 5.00)	Edit, Delete

Once you are happy with the asset list and any errors have been amended then click “+ Import Data” and this will populate the A/C Units asset list within ACE. It is worth noting that ACE will assign all the A/C units to the first comfort cooling time zone.

### Room Sizing:

You should now move to “Room Sizing”, any rooms automatically created while added, AHU’s, A/C or Chiller units will be visible within this tab and you now need to edit the room details, click on the “EDIT” button to get started.

Add the room size and the number of occupants and then choose your cooling load density.



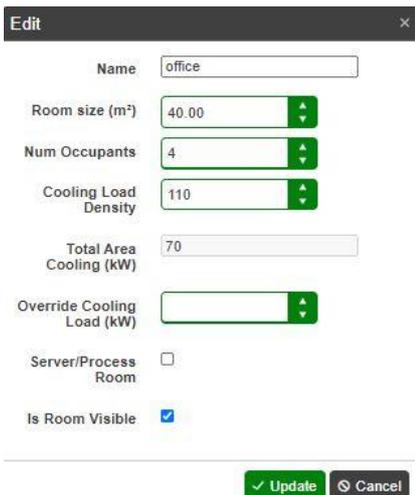
**Totals**

Total Building Cooled Area (Calc): 2.0m<sup>2</sup>      Expected Cooling Load: 110.0W/m<sup>2</sup>      Number of Occupants: 2  
 Cooling Capacity: 80.0kW      Actual Cooling Load: 40000.0W/m<sup>2</sup>  
 Calculated Energy Input: 15.3kW      Cooling Energy Input: 7670W/m<sup>2</sup>

Use Building Total Cooled Area (Calc)  Save

**Details**

Name	Floor Area	Occs	Total Cooling Load (kW)	Cooling Load Density	Req Cool Cap	Server/ Process	Is Visible	Comment	Var %	Partial Loading	Edit
office	1	1	70	110	0.1	<input type="checkbox"/>	<input type="checkbox"/>	Oversized	69900	Some	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
server	1	1	10	110	0.1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Oversized	9900	Yes	<input type="button" value="Edit"/> <input type="button" value="Delete"/>



**Edit** [X]

Name: office

Room size (m<sup>2</sup>): 40.00

Num Occupants: 4

Cooling Load Density: 110

Total Area Cooling (kW): 70

Override Cooling Load (kW):

Server/Process Room:

Is Room Visible:

Update Cancel

**Cooling load density** - There is a table which shows in the report which is the BSRIA guide showing standard Wm<sup>2</sup> for different areas, you should use these as a guide but change as required based on your observations on individual room / building heat gains or high occupant densities. The ACE defaults to 110Wm<sup>2</sup> which is the one we use as an average across normal office spaces. You can change this manually as required. Please look at the BSRIA guide produced in the ACE to familiarise yourself with the rules of thumb. (For server rooms it is often thought that 400 - 600W m<sup>2</sup> is usually about right, although this obviously depends on the density of servers within the room.

**Override cooling load kW** - Use this field if the amount of cooling in a room is different to that shown in the field above (Total Area cooling kW). An example of this would be when you have linked a 5kw single split system to a room, but there is also another 3kW supplied from a single internal unit linked to a VRV which mainly serves the adjacent office. You would then fill out the Override cooling load with a figure of 8kW. This would mean the sizing calculations would be based on 8kW rather than the 5kW.

**Server / process:** - Check this box if the systems in this room are process cooling. This will ensure that all systems in this room are based as process cooling and not included in the comfort cooling calculations in the report. This is a backup if you have forgotten to tick them as process in the ADD AC UNIT section.

**Is room visible:** - If you do not tick this box the room will not display in the “Room Sizing” table (Table 7) in the report. If you are not sizing a room and are using ACE, just to capture the asset you may wish to leave the room as “not visible”. We advise sizing all rooms when on site to capture the total comfort and process cooling on site. Please note that there is no need to size and tick “is visible” for areas where AHU’s only serve, as there is no cooling associated with these areas, if ticked this can cause the calculations to be incorrect throughout the report.

Units Room Sizing Time Zones Photos Attachments Maintenance Text Recommendations TM44 Inspection Fields Sections

**Totals**

Total Building Cooled Area (Calc): 41.0m<sup>2</sup>      Expected Cooling Load: 110.0W/m<sup>2</sup>      Number of Occupants: 5  
 Cooling Capacity: 80.0kW      Actual Cooling Load: 1951.2W/m<sup>2</sup>  
 Calculated Energy Input: 15.3kW      Cooling Energy Input: 374W/m<sup>2</sup>

Use Building Total Cooled Area (Calc)  Save

**Details**

Name	Floor Area	Occs	Total Cooling Load (kW)	Cooling Load Density	Req Cool Cap	Server/Process	Is Visible	Comment	Var %	Partial Loading	Edit
 office	40	4	70	110	4.4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Oversized	1491	Some	<span>Edit</span> <span>Delete</span>

**Linked AC Units**    Linked Air Handling Units    Linked Assets

+ Add new record

System	Make/Model	Output (kW)	Location	System Type	Time Zone	Edit
AC 07	Mitsubishi/PUHZ-ZRP100VKA	10	Roof	Single Split	Comfort Cooling	<span>Remove</span>

*Note: Use the left hand "Expander Triangle" next to each room to remind yourself which systems are linked into a room. You can remove units from the room and then add them to other rooms by clicking "Add new record". It is much quicker doing this here than going back into each AC unit to change the area it serves.*

### Maintenance Tab

Don't forget this tab, simply tick the equipment the client has on site and state how often it is maintained and the condition it was in when you looked at it. Condition is graded between 1 - 4 with 1 being good and 4 being very poor.

Equipment	Expected Frequency	Actual Frequency	Maintenance Standard	Visible	Edit
Ductwork	12	6	1	<input type="checkbox"/>	Edit
Internal Filters	6	6	0	<input checked="" type="checkbox"/>	Edit

Please note comments will be generated in the ACE in section 1.5 depending on what you select. For instance, if you select a 3 or 4 for any maintenance standard on any equipment, text will be automatically generated in section 1.5 which states

*“As some of the inspected areas need attention then it may be necessary to consider increasing the frequency of the PPM.”*

Or if you highlight that systems are maintained 12 monthly rather than 6 monthly then the following comment will be added into section 1.5.

*“The information below highlights that the installed equipment is not being maintained as regularly as recommended good practice guidelines. If filters or coils are found to be dusty/dirty in between service visits then an increase in the frequency of maintenance should be considered”.*

*Note: Use the APPLY TO ALL check box if all systems are the same condition i.e. - standard 1.*

**Edit** ✕

Equipment

Expected Frequency

Actual Frequency

Maintenance Standard

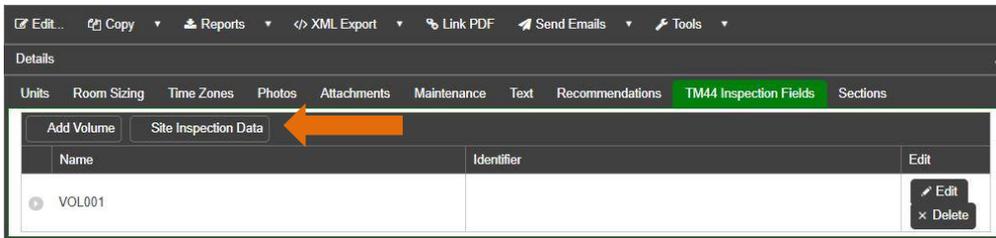
Visible

Apply to All

## TM44 Inspection Fields

Navigate to the “TM44 Inspection Fields” at the project level, by default, one Volume has already been created for you and it is easy to add more as and when required. Volumes and sub systems are only required on the sampled systems being inspected in line with the legislation.

Your first task is to answer the “Site Inspection Data” questions

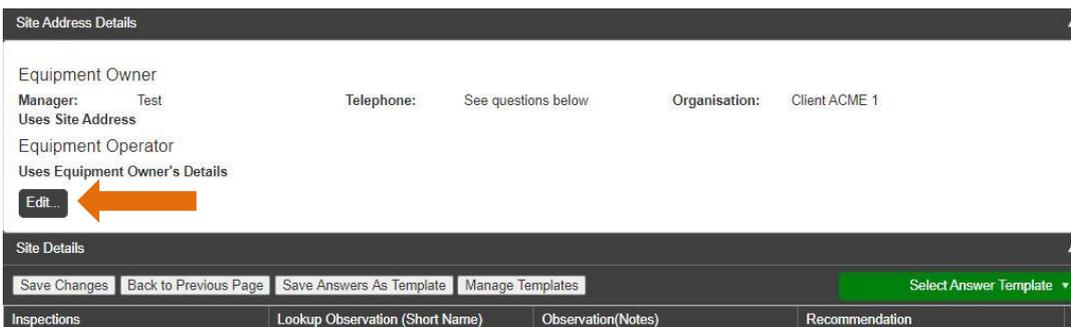


Site Inspection is split in to 2 sections

- Site Address Details
- Site Details

### Site Address Details

The default on all projects is to inherit the address properties captured at the creation of the project, this can be edited here and manually over written or a “Site Address” template can be selected where these details are replicated across portfolio projects.



Simply untick the boxes to manually replace the relevant address details or select from a saved "Site Details Template" to overwrite the current stored data.

Edit Site Details Select Site Details Template ▾

---

**Equipment Owner**

Manager's Name

Organisation Name

Use Site Address  ←

Address

Town

Postcode

**Equipment Operator**

Use Owner Details  ←

Responsible Person

Telephone

Organisation Name

Address

Town

Postcode

←

*Note: No Site Templates can be selected unless a Template has already been saved, templates are linked to the ACC COMP and are therefore available to be selected by all assessors associated to the ACC COMP.*

Templates can be created or updated using the "Save As Template" button, once you are happy with your changes click save to complete the edits to Site Address Details.

### Site Details

You will have returned to the Site Inspection page and can now start to answer the Site questions, as with the Site Address Details you have the option to select a template to import a set series of answers to the questions for that client. There are currently 32 questions asked at the site level some of these apply to the Sub System inspection questions where answers are likely to be the same across all sub systems.

All site detail answers have been pre-set to the most common, simply click in the “Lookup Observations” box to see the alternative answers and select accordingly. (Do not over time these answers) On selection, the “Observation” and “Recommendation” notes may change, if you wish to change any of the text in the boxes simply replace the text with your own. This text will transfer fully in to Evolve.

Contact Us   Inspections   Your Inspections   Data Reports   Lookups ▾   Account   Logout (ACME Assessor)

---

**Site Address Details**

Equipment Owner  
 Manager: Test   Telephone: See questions below   Organisation: Client ACME 1  
 Uses Site Address  
 Equipment Operator  
 Uses Equipment Owner's Details  
 Edit...

---

**Site Details**

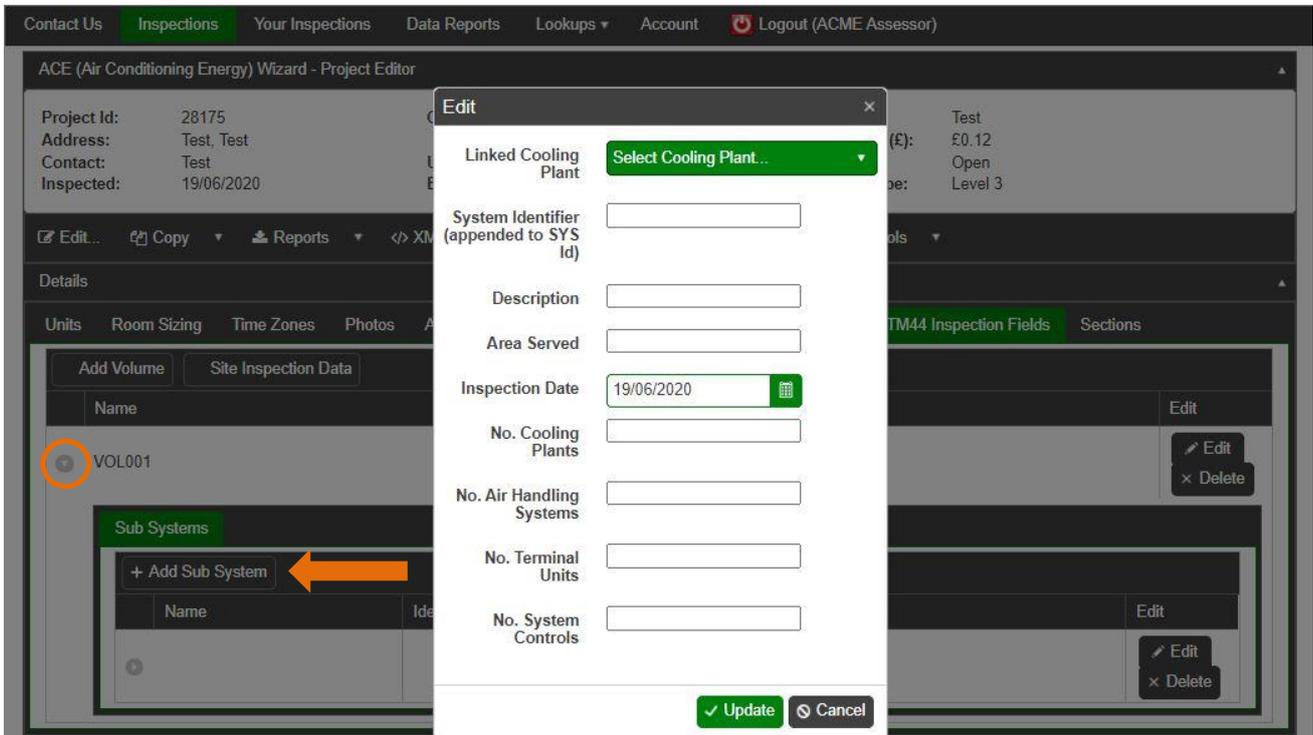
Save Changes   Back to Previous Page   Save Answers As Template   Manage Templates   **Select Answer Template ▾**

Inspections	Lookup Observation (Short Name)	Observation(Notes)	Recommendation
SD1 – F-Gas Compliant Status?	Date		
SD2 – F-Gas Compliant Date?			
SD3 - Equipment Owner Managers Telephone	Test		
SD4- Are any of the Sub Systems Sub-metered?	No		
SD5 - System Sampling?	Yes		
RI3 - Related Party Disclosure	Not Related	Not related to the owner/occupier or person who has technical control of the system or subcontractor	
CE1 - Itemised list of installed air conditioning and refrigeration plant	Reviewed		

### Creating Sub Systems and Sub system inspection fields

Click the Expander Triangle next to the VOL and click “Add Sub System”

The menu below will pop up and you can now select the system being sampled from a drop-down list of all systems you’ve added to the project.



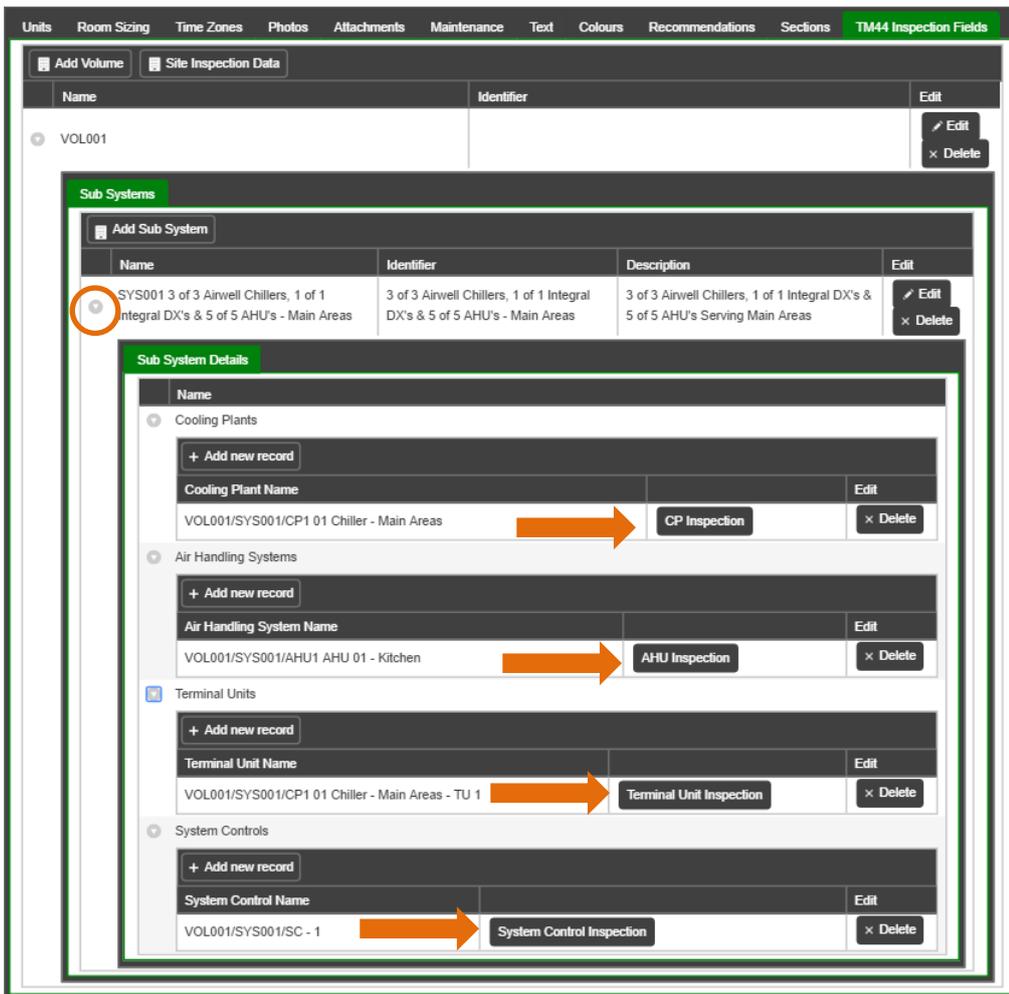
You can edit the “System identifier”, “System description”, you **must** also record the number of Cooling Plants, Air Handling Systems, Terminal Units and System Controls linked to the Sub System. The Inspection date will show the date the inspection date your recorded when creating the project, you can change this date if required. Once you have made the required changes click “Update”. The naming changes will be seen on the main screen once you click update.

Using the Expander Triangle at Sub System level open the view out to show the Cooling Plants, Air Handling Systems, Terminal Units and System Controls and begin to add the appropriate number of linked units in to the relevant area using the “Add New Record” in each category.

The image below shows how the view may look with one record added to each sub category. Repeat the exercise as many times as required.

*Note: only record systems which have been sampled.*

The next step is to complete the inspection fields at the Sub System level for each linked unit



The Cooling Plant inspection questions are as with the site data question pre-set to the most common answers recorded and you can now begin to review the default answers

There is a total of 29 questions in the Cooling Plant Inspection fields to be answered. Once you have completed an inspection record for a site, the answers can be reused on the next Inspection record of the same type using the “Pre-fill inspection from”.

Contact Us Inspections Your Inspections Data Reports Lookups Account Logout (ACME Assessor)

Name: VOL001/SYS001/CP1 AC 07 - office  
 System: AC 07  
 Model Number: PUIHZ-ZRP100VKA  
 Manufacturer: Mitsubishi

Pre-fill inspection from: **Select Inspection**

Save Changes Back to Previous Page Save Answers As Template Manage Templates **Select Answer Template**

Inspections	Lookup Observation (Short N...	Observation(Notes)	Recommendation	Use Site Answer	
CP05 - Plant Serial Number	2233ZU000				<b>Add Rec</b>
Does the system require F-Gas/ODS leak inspections?	Yes	The system is installed with 5.6kg of R410A and as such it has a GWP (Global Warming Potential) which is equivalent to 11.7 tonnes of CO2.	As the system has a GWP equivalent to between 5 and 50 tonnes of CO2 it is a legal obligation to keep an F-Gas log book on this system and have it checked for leaks on an annual basis.	<input checked="" type="checkbox"/>	<b>Add Rec</b>
CP - Assess the refrigeration compressor(s) and the method of refrigeration capacity control	Inverters	System Input Power = 2.6kW System EER (Energy Efficiency Ratio) = 3.8 Energy Label Class = A The system is installed with inverter technology, this is more efficient than fixed speed systems as the inverter will modulate the speed of the compressor to match cooling load requirements.		<input checked="" type="checkbox"/>	<b>Add Rec</b>

Some of the observation notes and recommendations are pre-filled based on the data input at the asset list stage. To edit this, untick “Use Site Answer” as circled above, click into the box and edit.

There are also several questions for the subcategories that had already been answered at Site Detail level, these can be over written at the sub category level inspection fields for every linked unit if required.

CP22 - Is there evidence of regular maintenance?	Yes (Documentation Reviewed for all systems)	Planned Preventative Maintenance (PPM) documentation is up to date and was reviewed as part of this inspection.		<input checked="" type="checkbox"/>
CP23 - Is the maintenance carried out by suitable and competent persons?	Yes	Maintenance is carried out on the systems by REFCOM registered contractors . There are 2 maintenance visits per annum.		<input checked="" type="checkbox"/>
CP41 - Is the water flow through cooling towers or evaporative coolers even and efficient with no loss of water	No	Not applicable, no water cooling tower or evaporative coolers are linked to this system.		<input checked="" type="checkbox"/>
CP42 - Is there a management legionella regime in place?	N/A (Not Required)	Not applicable, it is not necessary to put a regime in place as the HVAC system does not have a Legionella risk.		<input checked="" type="checkbox"/>
CP43 - Is there separate equipment installed for humidity control?	No	There is no humidity control equipment linked to this system.		<input checked="" type="checkbox"/>

1 - 28 of 28 items

Save Changes Back to previous page

It is possible to add a recommendation straight from the inspection fields by clicking “Add Rec” located in the far-right column. This will bring up a window with the most relevant recommendation associated with the selected observation, you can edit the rec here.

*Note: You cannot edit the rec after clicking update from here, clicking the same “Add Rec” will create a new rec. To edit after clicking update you must exit and go to the main recommendations tab.*

Once you have added the recommendation the text; “Rec Added” will appear next to the field you added the rec from.

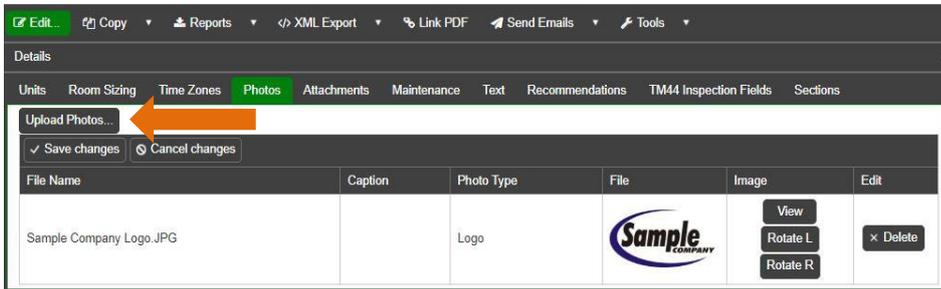
You can save your answers as a template for use on another project, by clicking the “Save answers as template” button, depending on your access level you will be able to save the template for your own use or as a template which can be used by all assessors linked to the ACC COMP.

Once you have saved a template the option to select a template then becomes visible along with the ability to manage the templates for Site, Cooling Plants, AHUs, Terminal Units and System Controls. To learn more about using and management templates go to <https://www.youtube.com/watch?v=mHTGmgswM9k> and <https://www.youtube.com/watch?v=OyisbgUBwkQ>

Now complete the Inspection fields for Air Handling Units, Terminal Units & System Controls for each system linked to the Sub System.

## Photographs

If you want to add photos to a report, then do so at any stage. By default, a project will show the ACC COMP company logo on the project this is added to each project on creation and is used in the client facing PDF report.



To add photos, click “Upload Photos”. ACE allows you to upload multiple images in a batch, the image will automatically be compressed to an appropriate size for the report.

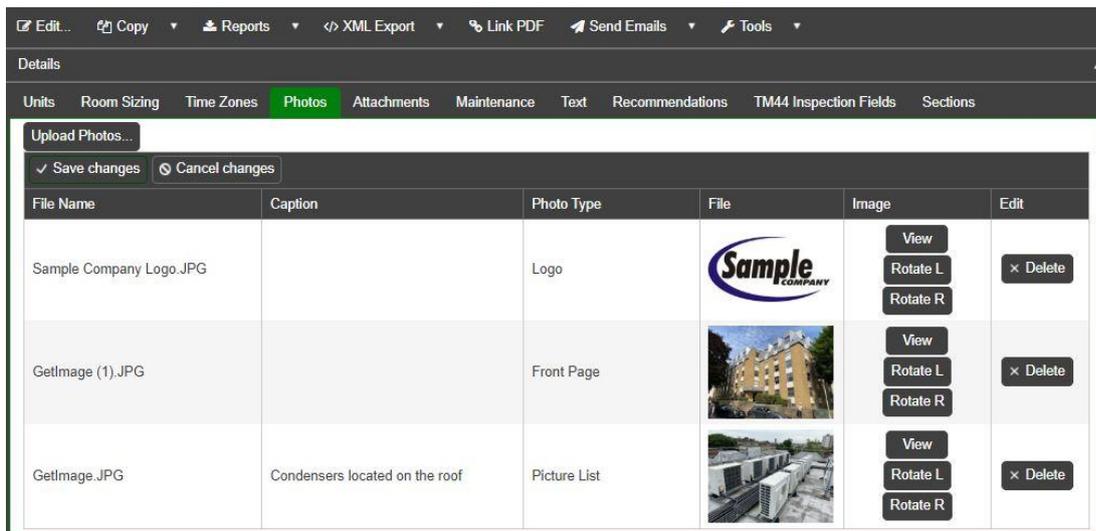
Once the upload is complete you will need click into the “Caption” box next to each picture to name them and set the Photo Type which determines where the image will be used in the PDF:

Front Page – will add the picture to the 1<sup>st</sup> page of the ACE report.

Logo – uses the image as the ACC COMP Company logo

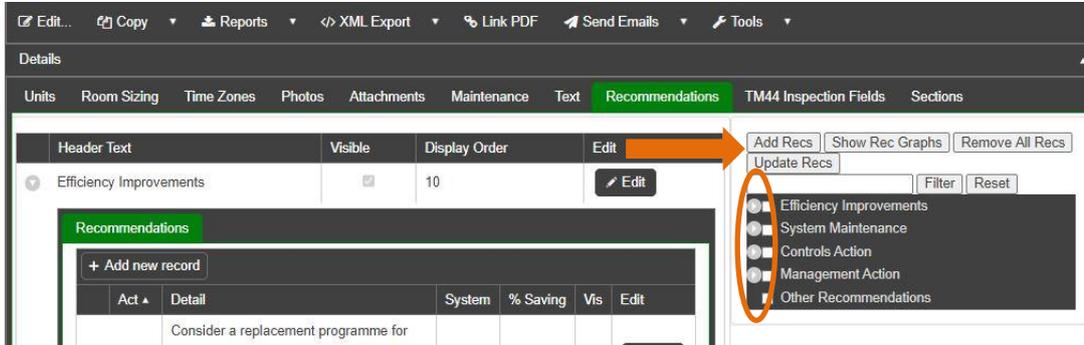
Picture List – groups up to 8 pictures per page within the photograph section of the PDF.

To re-arrange the photos simply click and drag the photo to the position and order them how you wish them to be displayed within the PDF document. Once happy with the photos ensure to click “Save Changes” before continuing.



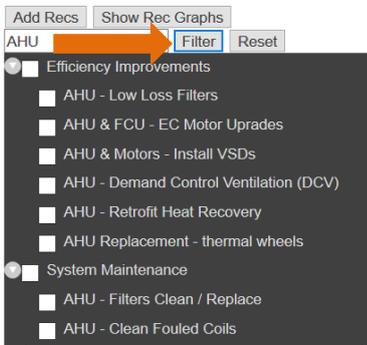
## Recommendations

The final piece of the ACE Wizard is the recommendations section as it enables the Assessor to quickly select appropriate recommendations and by using the data already in ACE to calculate the potential savings a client might achieve by adopting the report's findings.

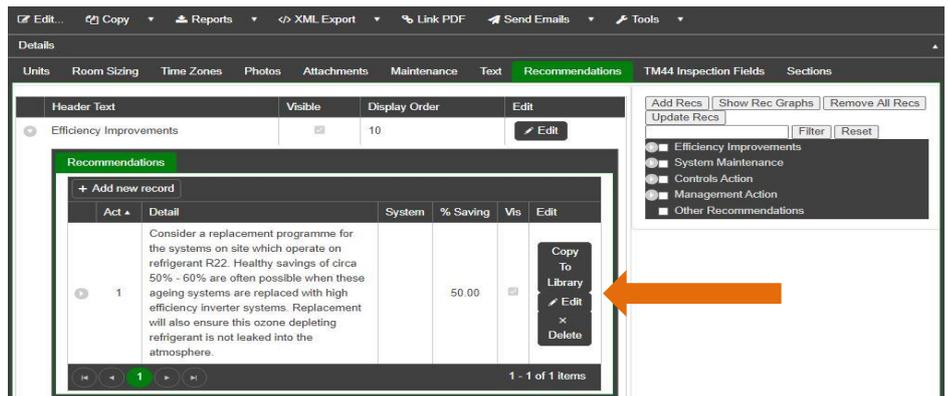


Presently there are over 200 Rec's in the Rec's library and these are growing. By clicking the Expander Triangles will show all recs listed under each section. However, using the filter box

will allow to search for a text which is contained in the recommendations title or popup discretion box. For example, typing "AHU" in the box and clicking "Filter" will automatically expand the sections with recommendations containing the word "AHU".



By hovering over a recommendation, a pop up box will appear giving the assessor more information on the detail of the recommendation. To select a recommendation, tick in the clear box next to the rec and then click "Add Recs"



The selected recommendation will appear on the left-hand side of the screen and you can go into each recommendation to edit them by clicking the "Edit" button.

At this stage, you can personalise the recommendation to make it system specific or site specific. You do this by changing the wording in details section of the edit screen (see next image). It is the wording in the "Detail" that is transferred over into the Evolve and displays in the ACE Wizard report.

You will notice when you are editing a recommendation that as well as the Details section there is also a "Comment" box. The comment box is not compulsory; the text shows on the web view only of the recommendations through ACE and in the Excel export, a client can run across their sites. It is meant as extra energy information for the client relating to the recommendation, the comments have been set up to be as generic as possible so they usually do not require changing, however you should have a quick glance across it, particularly if you have changed the wording on the recommendation

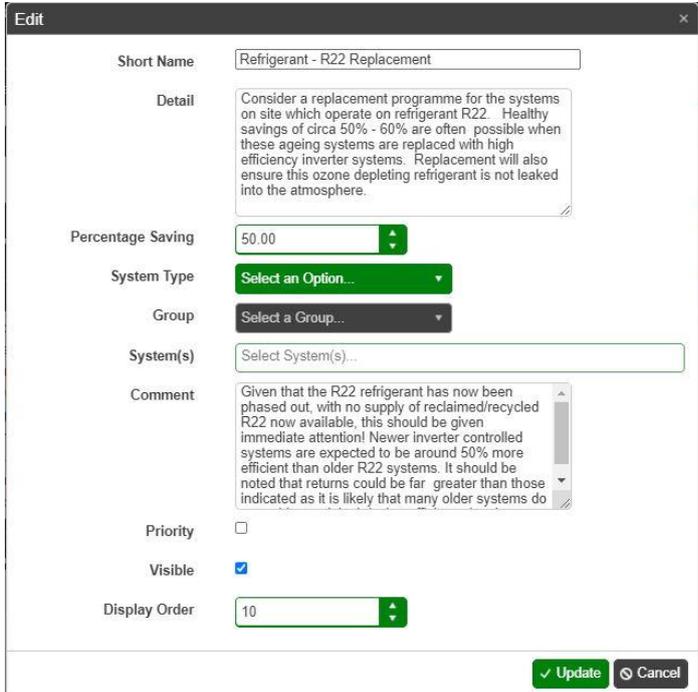
detail, just to ensure the comment is relevant. You can delete the comment altogether if you are not comfortable with it.

**Short Name** – No need to edit this.

Most recs are prefilled with an average saving %, this has been based on online industry expectations, these can be to change as you see fit on an individual basis based on your assessment on site. We also change the percentage depending on the individual case. For example, if PIR sensors are installed to a building with only 1 small meeting room, they may only save 1 or 2 percent, however if the building has many meeting rooms that are rarely used and you feel they leave systems on when the rooms are vacant, then you may save 50% or even more.

Whilst editing a recommendation you need to link the rec to a “system type” and then to a “Group”, once you have selected a group, you can then apply the rec to single or multiple items within the group. This will then allow ACE to make the relevant calculations.

The system types and available groupings are based on the data you have already entered in the project, the following “System Types” exist;



**System** - Allows you to select:

- All Systems - (To use if a rec is appropriate to all AC systems such as sub-metering)
- By a specific group of common inefficient systems such as - All fixed speed systems
- Any individual system in the asset list (multiple systems can be selected)

**Time zones** - You can link a rec to any of the time zones you have created. For example, you may want to recommend they increase the server room temperatures and link it to “process systems” time zone. Or you may want to recommend they raise the set points in the offices and link it to “Comfort Cooling” time zone.

**Unknown** – This may be used where savings could be made against a system other than the cooling plant, for instance if you were to recommend installing a form of heat recovery this would reduce boiler run time, as heating systems do not form a part of the report you may wish to put a saving set to unknown.

**Area** - You can also select on the each of the rooms in the building, so if you want to recommend that they harmonise set points in the open plan office it will calculate the savings based on the operation of all the systems linked to the open plan office.

**AHU** – This allows you to select all AHUs, specific AHU(s) or all AHUs without VSDs.

**Refrigerant** – This will allow you to group a recommendation to any refrigerants the systems have installed on this site

**Manufacturers** – Enables you to calculate the recommendation based on a manufacturer

**System Type** – Such as Split, Multi Split, VFDs, AHU etc.

**Time Zone Type** – You can link a rec to all comfort cooling systems, all process systems or all mechanical ventilation systems. This is particularly useful if multiple time zones have been created.

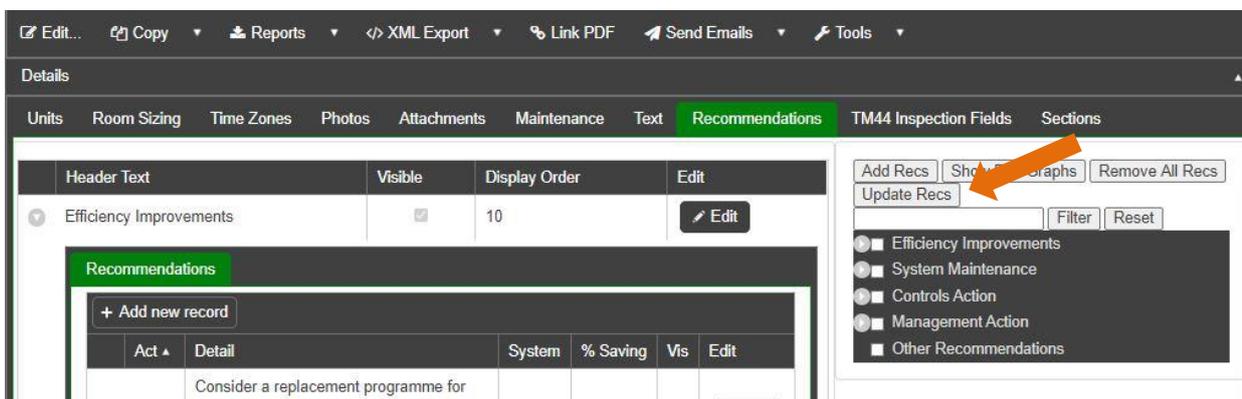
**Condition** – Good, Poor, Ageing etc.

**Visible** – Visible should be ticked by default, removing the tick will hide the recommendation from the report

**Priority** – This should be ticked where any significant recommendations have been made and need to be highlighted to the client.

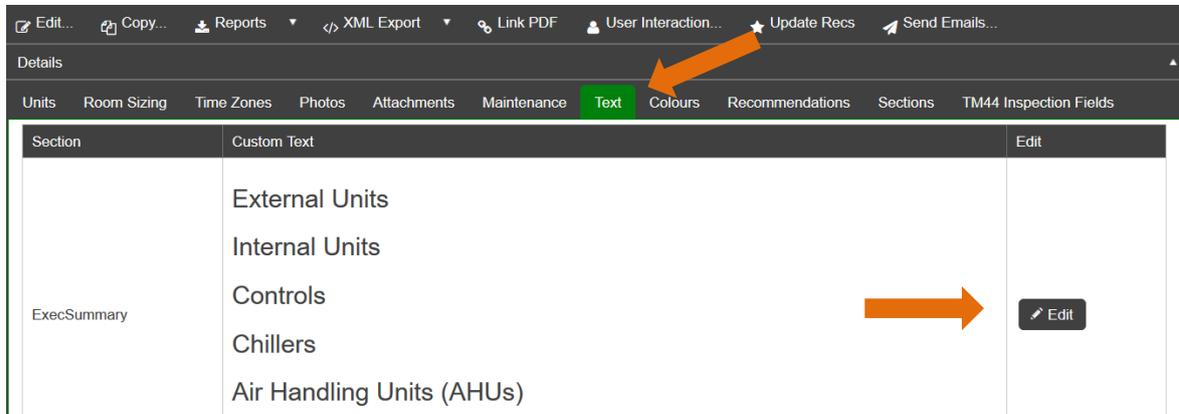
You can see a training video on how to use recommendations by going to <https://www.youtube.com/watch?v=zvqy-iJLdPM>

*Note: In the case that any new recommendations or updates to existing recs do not show on the PDF the assessor can click “Update Recs” to apply the changes to the project.*



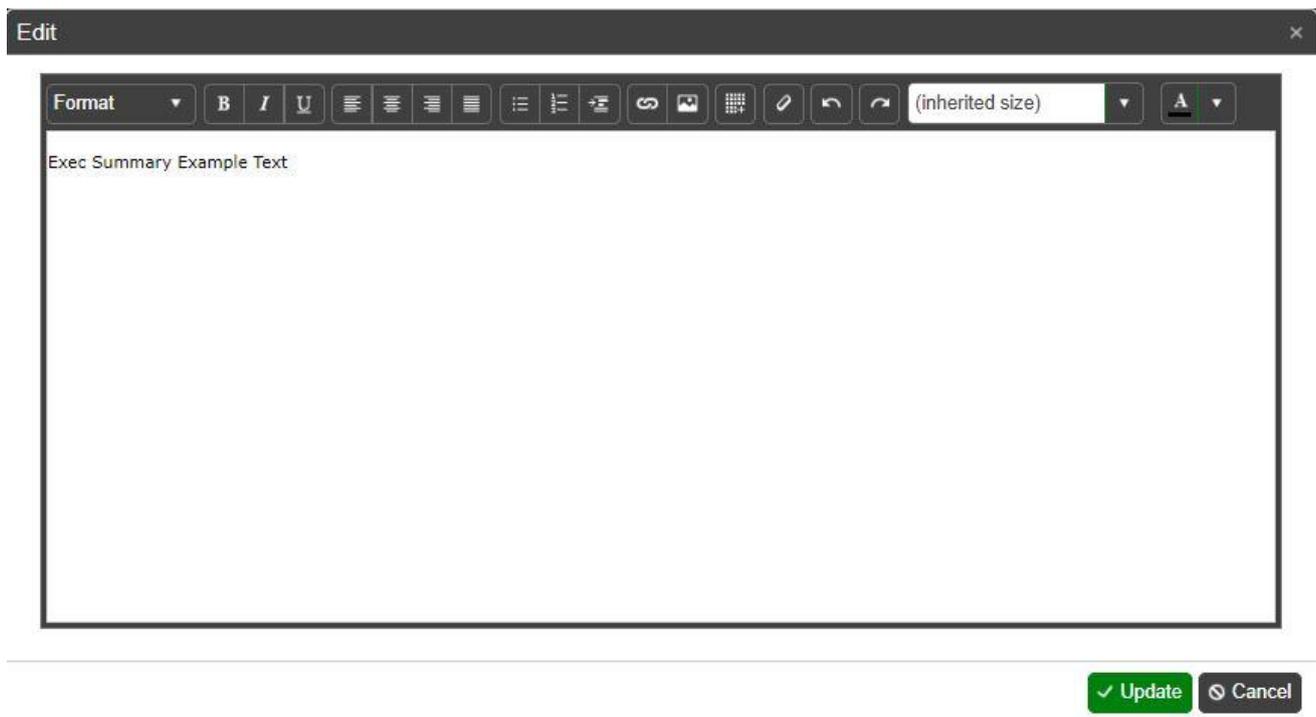
### Executive Summary

Once you have filled in all the ACE project information you can then begin to write your executive summary and summary of findings. Whilst ACE tries to honour Word formatting parameters these can sometimes be difficult to handle. To minimise this a word template can be provided which using formats which minimise any formatting issues when copying and pasting text from Word in to ACE.



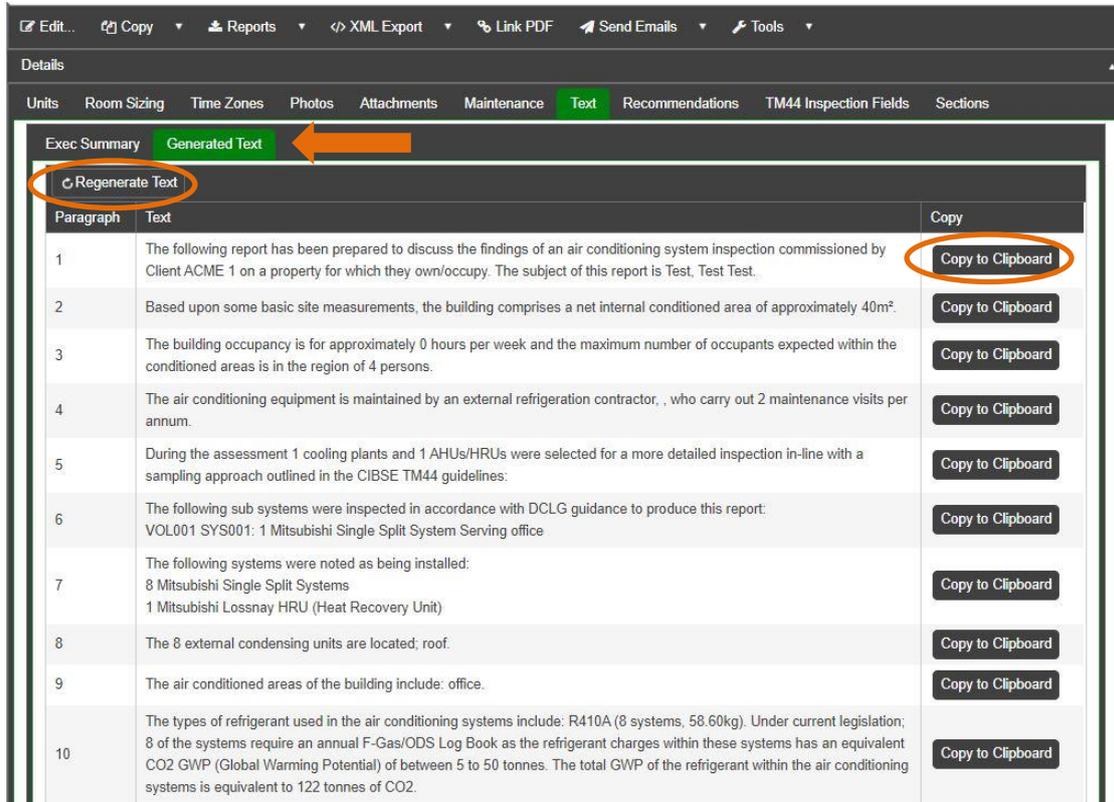
From the “Text” tab, click edit to paste your text into ACE, we can provide a Word template on request which uses tested fonts and formatting which can be copied easily into ACE Wizard.

Within the edit tab there are multiple editing tools available across the top of the window. Once finished make sure to click “Update”.



## Generated Text

As you go through and input data into the ACE Wizard it will generate some useful informative paragraphs which can be used in your executive summaries. You can find these under the “Text” tab and by clicking on “Generated Text”. To copy the text simply click “Copy to Clipboard” and paste into the relevant area of your exec summary.



The screenshot shows the software interface with the following elements:

- Top navigation bar: Edit..., Copy, Reports, XML Export, Link PDF, Send Emails, Tools.
- Details section: Units, Room Sizing, Time Zones, Photos, Attachments, Maintenance, **Text**, Recommendations, TM44 Inspection Fields, Sections.
- Sub-sections: Exec Summary, **Generated Text** (highlighted with an orange arrow).
- Buttons: Regenerate Text (circled in orange).
- Table with 10 rows of generated text paragraphs, each with a 'Copy to Clipboard' button (circled in orange for the first row).

Paragraph	Text	Copy
1	The following report has been prepared to discuss the findings of an air conditioning system inspection commissioned by Client ACME 1 on a property for which they own/occupy. The subject of this report is Test, Test Test.	Copy to Clipboard
2	Based upon some basic site measurements, the building comprises a net internal conditioned area of approximately 40m <sup>2</sup> .	Copy to Clipboard
3	The building occupancy is for approximately 0 hours per week and the maximum number of occupants expected within the conditioned areas is in the region of 4 persons.	Copy to Clipboard
4	The air conditioning equipment is maintained by an external refrigeration contractor, , who carry out 2 maintenance visits per annum.	Copy to Clipboard
5	During the assessment 1 cooling plants and 1 AHUs/HRUs were selected for a more detailed inspection in-line with a sampling approach outlined in the CIBSE TM44 guidelines:	Copy to Clipboard
6	The following sub systems were inspected in accordance with DCLG guidance to produce this report: VOL001 SYS001: 1 Mitsubishi Single Split System Serving office	Copy to Clipboard
7	The following systems were noted as being installed: 8 Mitsubishi Single Split Systems 1 Mitsubishi Lossnay HRU (Heat Recovery Unit)	Copy to Clipboard
8	The 8 external condensing units are located; roof.	Copy to Clipboard
9	The air conditioned areas of the building include: office.	Copy to Clipboard
10	The types of refrigerant used in the air conditioning systems include: R410A (8 systems, 58.60kg). Under current legislation; 8 of the systems require an annual F-Gas/ODS Log Book as the refrigerant charges within these systems has an equivalent CO2 GWP (Global Warming Potential) of between 5 to 50 tonnes. The total GWP of the refrigerant within the air conditioning systems is equivalent to 122 tonnes of CO2.	Copy to Clipboard

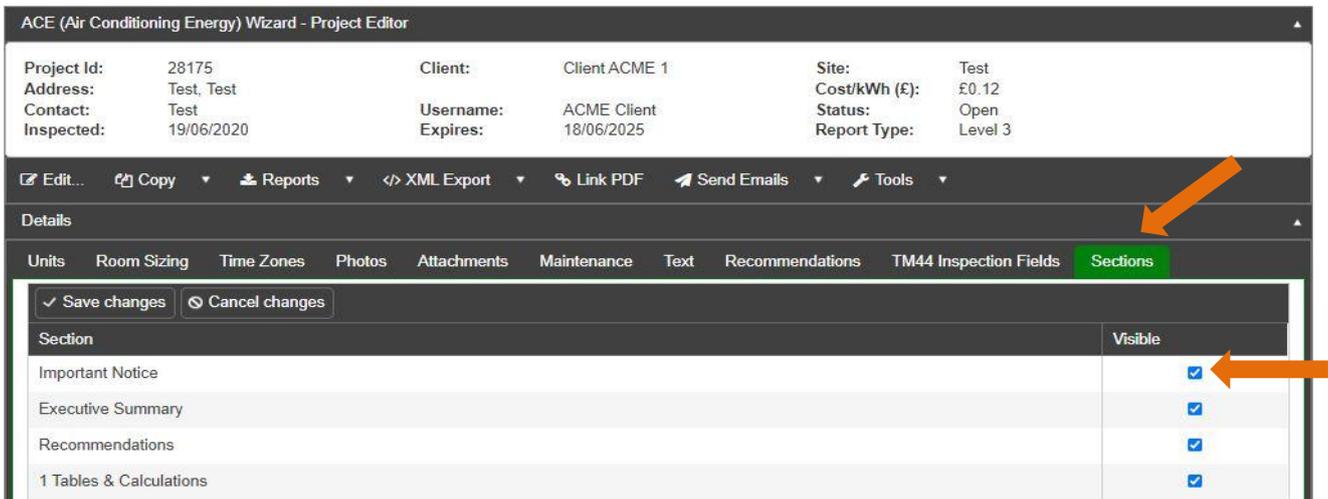
*Tip: It may be useful to create an exec summary template to incorporate the generated text paragraphs quickly.*

Each paragraph must be checked before copying and pasting into your exec summary, the information is only as accurate as the data entered into ACE. This can be a good way to double check that the data has been entered correctly. If any amendments are made in ACE after initially generating the paragraphs you must click “Regenerate Text” so that the paragraphs will update with the new information.

## Sections

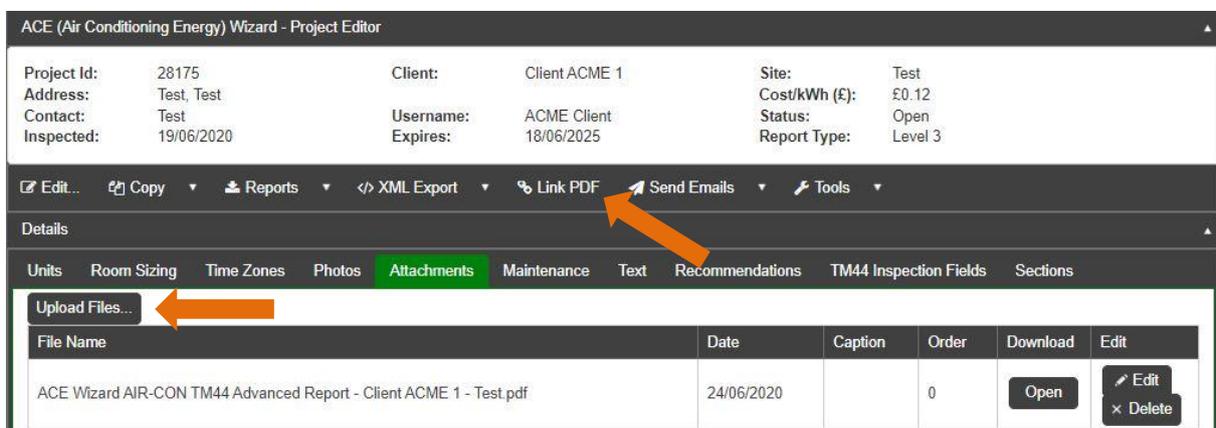
All sections of the ACE PDF are set “Visible” by default apart from section 4 TM44 Additional Inspection Information and Sampled Systems which can be used for completing a TM44 report for Scotland. To show this section or to hide other sections from the ACE PDF report go to the section tab in the project and either tick or untick each box and click “Save Changes”.

*Note: All sections will always display in the live web view of the report*



## Attachment

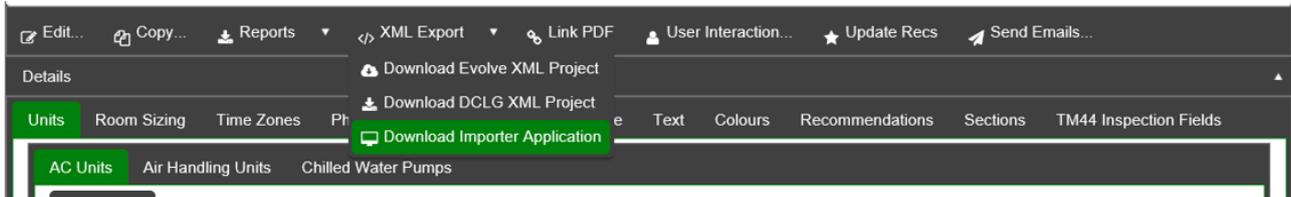
In the attachment section, you can upload the evolve report and certificate as well as capturing the ACE Wizard PDF. To generate the ACE Wizard PDF, click on the “Link PDF” tab your ACE Wizard report will automatically upload into your attachment section. The official certificate and report can be uploaded manually to the ACE Wizard project from the attachments menu within the project. Click Upload Files to select a file from your computer / network. Please note that any files that are intended for the end client must but in PDF format (.PDF file), other file types, such as word documents (.DOCX) can only be seen and accessed by the assessor and ACC COMP.



*Note: When you “Link PDF” or attach a document, ACE will ask if you would like to move the project from “Open” to “Draft” or “Closed”. Projects that have an “Open” status will not be seen by the end client.*

## Import to Evolve

There are 2 ways to export to an ACE Wizard report to evolve



1. Download Importer Application
2. Download Evolve XML Project

### Download Importer Application

This is the most common way, by selecting this option you will be directed to a setup page. If this is the first time please click Install and follow the on screen instructions. Note: Windows may ask you to confirm you trust the source before running. Once installation is complete the programme will run automatically

If you have already downloaded the application previously click launch to run the application.

The importer application will be now visible as an icon on your task bar.

**ACE Wizard**  
**ACE Wizard To Evolve Project Importer**

**Name:** ACE Wizard To Evolve Project Importer

**Version:** 1.0.0.35

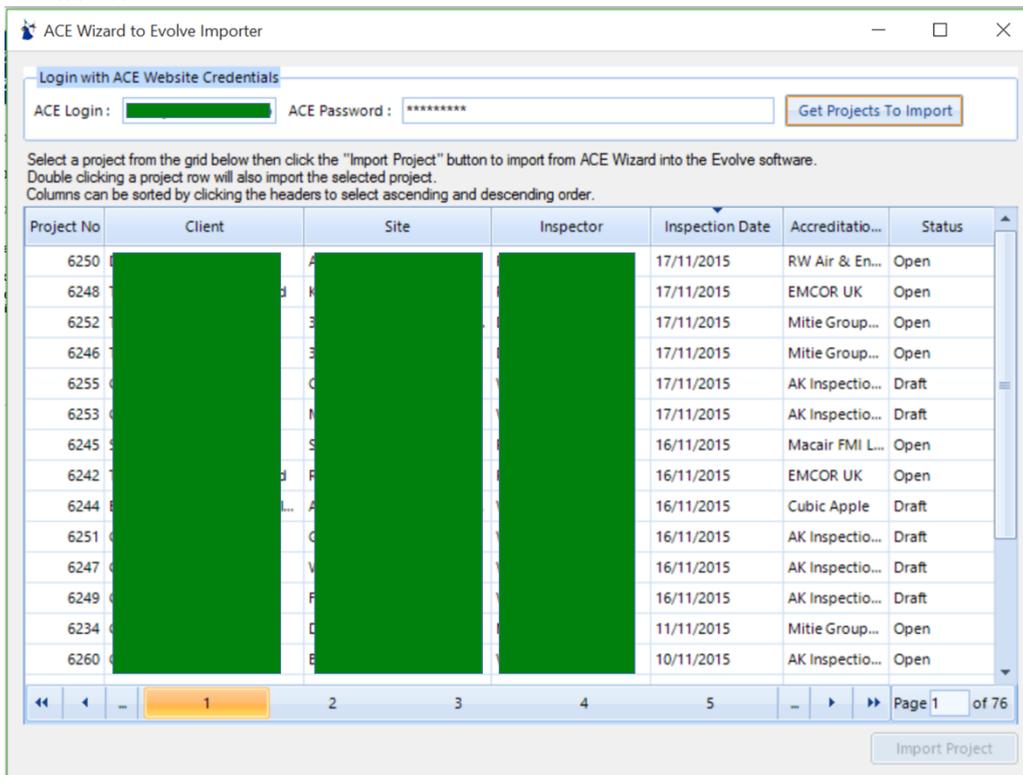
**Publisher:** ACE Wizard

The following prerequisites are required:

- Microsoft .NET Framework 4.5.2 (x86 and x64)

If these components are already installed, you can **launch** the application now. Otherwise, click the button below to install the prerequisites and run the application.

Install



Enter your ACE Wizard user name and password and click "Get Projects to Import" to retrieve your projects. Note: the projects displayed will correspond to your access rights in ACE Wizard.

Have Evolve open, select the project you want to import in to Evolve.

The project is now ready for you to review in Evolve. In the normal manner.

### Download Evolve XML Project

If the importer is not able to run because of a company's security permissions or for any other reason you have the option to download the ACE Wizard project as an XML file which can be imported manually in to Evolve as follows.

When the download completes copy the Project.xml file to the appropriate directory in your local Documents\Sterling Evolve folder and name it Project.xml.

*Note: Before copying ensure the Evolve software is not running or that all projects are closed and the software displays the Project Manager Window.*

## Other things to do in the ACE

**To replicate an entire project** - Click on the "COPY" tab (The Inspection fields will not replicate into a new project also the recommendations will replicate you should click on "UPDATE RECS" to see them). Please be aware copy project will not copy the volumes or site inspection data.

**To generate a PDF (Or word) report or view a report on line while working on a project** - click on the "REPORT" tab and select as required.

**Download our ACE to Evolve Importer App** - Go to the "XML EXPORT" tab and select "Download importer Application" when this is importer is used Evolve files can automatically be sent into your Evolve projects folder when you select them. You will need to be running the latest Microsoft .Net framework for the ACE importer to work.

**Support** – To contact ACE Wizard for advice on using ACE, to raise a bug, to suggest an improvement or to have systems added to the database email [support@acewizard.co.uk](mailto:support@acewizard.co.uk) or call 01420 446202.