

## Getting Started



Once you have registered for a user account and have logged in, you are ready to begin using the new REScheck-Web. This modern version includes a few new features.

### New Features

**Profile Page** – each user account has a profile page that allows you to customize information about yourself that can, if desired, be shared with others. The profile page also enables you to manage contact information in a personal address book. These contacts can then be granted sharing privileges to one or more of your REScheck projects. You can even upload a picture of yourself! To access your profile page, click on your username (e.g., your email) link in the top right corner.

**Project Dashboard** – as projects are created and saved, they get added to the project dashboard (aka “Home”). Listed projects can be viewed, edited, and even copied to start a new project. The dashboard is the page that loads after you have logged in, and it can be accessed from anywhere in the tool by clicking Home in the top left corner.

#### Dashboard Features:

There are a few different ways to use the Dashboard:

1. Clicking on the checkbox in front of a project row enables the following menu bar that enables several functions for any project selected:



*Delete a project:* deletes any selected project. You can also right click on the project row and select Delete from the menu.

2. Clicking in an individual project row:

Clicking on a project row will open the project in view-only mode.

*Edit a project:* once in view mode, click on the Edit button in the top right of the screen. From Home, you can also right click on the project row and select Edit from the menu.

3. Right clicking on a project row provides a menu with several options:

*View Compliance*

*Edit*

*Delete*

**Project Sharing** – allows you to share projects with others for viewing and editing without having them log in with your log-in credentials. A few potential sharing scenarios: 1) You want a colleague to review a project; 2) a colleague needs to complete some of the project details; 3) you want to have a code official review the project.

To share a project: 1) add the people to your address book on your profile page; 2) go to Home and click the Sharing icon in the Sharing column of the project row you wish to share with others and complete the Sharing screen (shown below). Two permission levels are available: View Only and Can Edit.

Name	Email	Permissions
Bozeman Building Dept.	BZNBbuildDept@mt.gov	Read Only <input type="button" value="Share"/>
John Doe	john.doe@acme.com	Can Write <input type="button" value="Share"/>
Jane Doe	jane.doe@acme.com	Can Write <input type="button" value="Share"/>

Clicking the Share button in the screen above will send an email to that user notifying them a project sharing invitation has been made. The email recipient must then click the hyperlink in the email to accept the invitation. Projects that have been shared with others will have a “Shared” label alongside the project title.

We hope you find the new features useful and beneficial. The section below describes the steps involved in creating a new project. Additional details are available from the Help links within the application.

## Creating a New Project

**Step 1:** Click on the New Project button and enter your Project Information.

- Enter a project title.
- Select the energy code applicable for the project location. If you are unsure what code to select, click the “What’s my code?” link on the Project screen under the Energy Code entry field.
- Enter your location – begin typing the city name or enter a zip code. As you type city names, the locations available that match what you have typed will appear in the drop-down list. Complete the location by selecting from the drop-down list.
- Select the appropriate project type
- Select the compliance method (if unsure, select UA Trade-Off)

**Step 2:** Enter the Building Characteristics

- Select the construction type you are going to build
- Enter the conditioned floor area in square feet
- Specify the orientation of the front face of the building, which represents the angle of the front face of the building relative to North (e.g., if the building front faces North, the building orientation will be 0 degrees)
- Answer the questions under “Features”

**Step 3:** Enter project details such as Construction Site, Owner/Agent, Designer/Contractor (Optional)

**Step 4:** Click on the Envelope tab and enter the applicable building components in your project (Ceilings/Skylights, Walls/Windows/Doors, Foundations). Enter only the components that separate conditioned space from unconditioned space. You may add as many components as you need to describe your building, including multiple components of the same type. If all components of one type (e.g., all exterior walls) have the same construction characteristics (e.g., all are wood-frame, 16” o.c. with R-13), you may add the square footage of all of the components of that type together and insert only one row.

**Step 5:** If you selected the Performance Alternative compliance method on the Project screen, enter the applicable Mechanical information.

**Step 6:** Click on the Compliance tab to view compliance results and to enter the requirements information. (Note: in the review version of the app, only example results are available)

**Step 7:** It is advisable to click Save periodically. Once a project has been saved you can return to the project dashboard and elect to create a new project or edit any of the previously saved projects. Activating a project from the project dashboard by clicking on a project row will by default display that project in read-only mode. Click on the Edit button to enable editing privileges. Once a project has been deemed complete, click on the Compliance tab. Review and respond to the mandatory requirements listed. Click on Reports to select the type of report to generate and to acknowledge the report is deemed “complete and ready for submittal”.