LEEDuser

Using LEED Online: A Status Report and Key Updates
By Michelle Reott

The current version of LEED Online was originally developed for LEED v4 projects and released in 2014.

The current LEED Online is the third version, after LEED Online v2 and LEED Online v3. (For those of us who have been working with LEED for over a decade, I guess LEED Online v1 was considered the Excel spreadsheet and Word document combo we used after the original paper 3-ring binder submittals.)

USGBC's goals for the current LEED Online platform have been to make it simple, adaptable, and singular—though launched for LEED v4 projects, LEED 2009 projects were later imported into it.
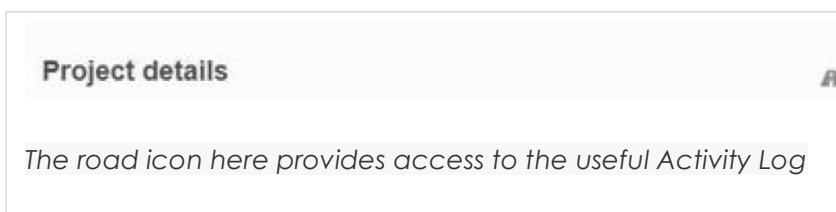
Some bumps in the road

The upgrades to LEED Online have been positive, overall, but there have been bumps in the road. In December 2014, active project team administrators and members for commercial projects got notice on December 18th via email that LEED 2009 projects were being upgraded in only 10 days to the new LEED Online. Merry Christmas and Happy New Year! I frantically saved all my projects' LEED documentation as backup. While my teams didn't have any problems with the platform change, many teams did (see the pages of comments under this USGBC post).

On the plus side, USGBC has been proactive in adding messages to its homepage and LEED Online homepage to notify teams about ongoing site maintenance and downtime.

My tips for using the new platform

Despite the initial hiccups, I've been pleased with the new platform. And after I got over my initial reservations about the lack of control for Project Administrators (although I do use Exclusive Access on all my projects to assign credits), I am enjoying the benefits of its more open architecture and the streamlined interface. (I do stress to my teams to please *never* push the big blue Submit for Review button.)
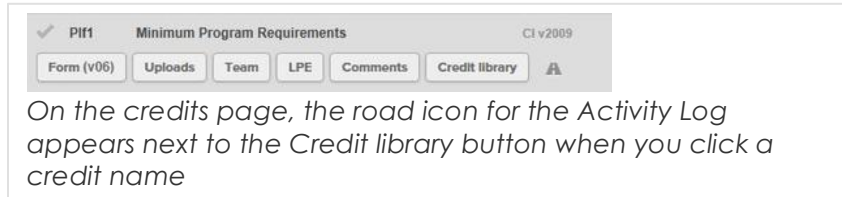
I use the Activity Log to help overcome some of the loss of control that is a side

Project details   A

The road icon here provides access to the useful Activity Log

effect (or benefit) of the open architecture. It's handy to log on and see at a glance who has been doing what for all my projects. And it's useful to see the history of activity for an individual project or credit. (The Activity Log is what appears at the top of the Projects page when you log in (if you didn't hide it via the Project Settings). To access it within a project, click the road icon on the Details page, as shown in the screen capture.
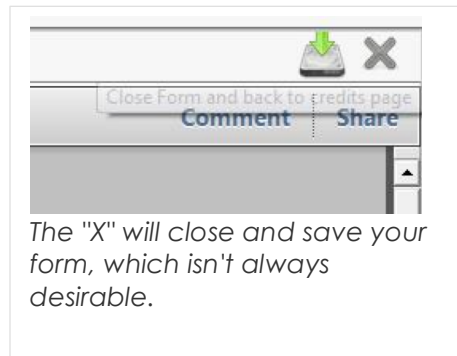
On the credits page, the road icon appears next to the Credit library button when you click a credit name (see screen capture).

On the credits page, the road icon for the Activity Log appears next to the Credit library button when you click a credit name

I've learned to live with the auto-save feature of the forms. (Thank goodness it never went down to the originally proposed two minutes, and we still have a more reasonable 10 minutes.)

And I've trained my teams to use the Back button in Internet Explorer to exit out of a form without saving. I tell them to just ignore the pop up that "entered form data will may be lost" and select "Leave this page." When in doubt, click "Stay on this page."

(USGBC hasn't taken my suggestion to change the X icon and its associated tooltip in the upper right hand corner of the form page. When you hover over the X, the tooltip text says "Close Form and Back to credits page." Unfortunately it doesn't just close the form, it saves it also. To Windows users, an X icon means close. To me it is counterintuitive to push the X and then get the message that your form has been saved and then the form closes. Right next to the X is a disk icon, which

The "X" will close and save your form, which isn't always desirable.

saves the form but doesn't close. I wish USGBC would change the tooltip to "*Save* Form and Back to credits page." What I'd really rather see is the X icon actually just close the form without saving.)
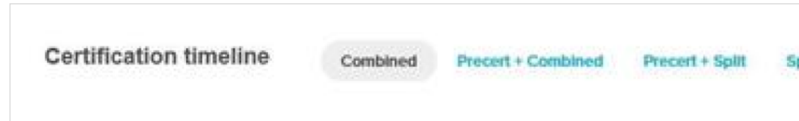
Updates to LEED Online
Here is a review of updates to LEED Online, in reverse chronological order.
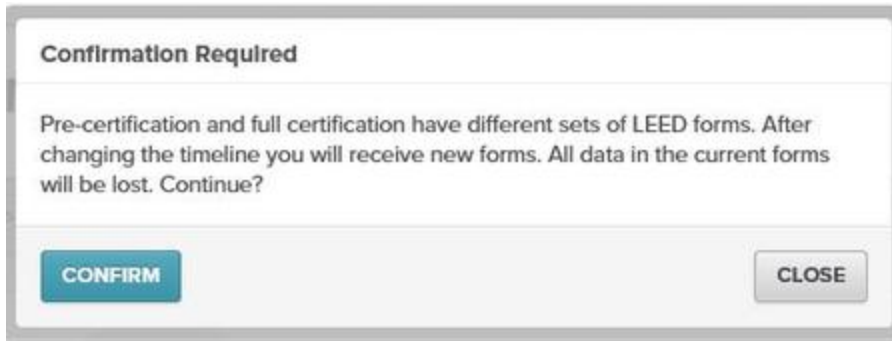
February 2017 update

USGBC's technology department was busy making visible and backend changes to LEED Online over the first weekend in February 2017 when LEED Online and USGBC websites were offline.

The biggest change was opening up new precertification options for v2009

rating systems other than Core & Shell as this USGBC article foretold for LEED v4 projects. Only projects that have the v06+ forms (those registered after January 1, 2016) and have not gone for a review will see the precertification option in the Certification timeline. Teams will change the timeline from the Combined or Split to Precert + Combined or Precert + Split.

Projects registered before January 1, 2016 who have the pre-v06 forms can still use the precertification option but they must consent to the project's forms being upgraded to v06+. But before clicking the Confirm button, teams should back up any data in LEED Online.

Confirmation Required

Pre-certification and full certification have different sets of LEED forms. After changing the timeline you will receive new forms. All data in the current forms will be lost. Continue?

CONFIRM   CLOSE

Ever had your project's square footage increase substantially between the Design and the Construction Application submittals? Previously the invoice that you received for the Construction Application wasn't very clear that there was an additional charge for the Design Application too. USGBC's technology team addressed this by making the invoice more user-friendly and explaining the additional charge by highlighting the previous square footage used in the Design Application.

Lastly, the technology team added a new option under Project Registration for K-12 schools for data tracking. Similar to the checkbox for identifying a project affiliated with a LEED Lab, a K-12 school can identify its affiliation with a K-12 school district. When checked, a new field appears to let the team enter the K-12 school district name as it appears in the National Center for Education Statistics database.

January 2017 update

Unlike the wholesale changes LEED users experienced in early 2016, you may not even notice the modifications USGBC made to LEED Online this holiday. As of January 1, 2017, USGBC's technology department upgraded LEED Online to support separation of two functions: submitting a project for review and payment of LEED certification fee.

This functionality push allows the prepayment of certification fees that USGBC announced in November as part of the new LEED pricing effective December 1, 2016. Currently registered projects have until March 1, 2017 to complete certification or prepay certification fees in order to lock in the pre-December 2, 2016 pricing. As noted in the article, this is the first time USGBC has increased pricing since 2010.

Prior to this LEED Online adjustment, teams paid the certification fee when they submitted a project for review. With this update, these functions are separated so that teams can pay the certification fee and later submit the project for review. Teams will see this prepayment option as a button (Make Pre Payment) on the Certification Timeline (accessed via the Timeline button) for the Preliminary Review. Teams using a split review will see a new button for both the Design and Construction Preliminary Reviews and those using the combined review will see a single button on the Design and Construction Preliminary Review.

After clicking any of the Make Pre Payment buttons, teams will see the familiar payment page, which will be entitled Pre Payment for Review. Teams can then pay by credit card or check. While this functionality will not affect all teams, those who are prepaying certification fees will

appreciate the change—as will those whose clients pay the fee separately.

October 2016 Update

Since last quarter, USGBC updated five offline calculators and one form for LEED 2009 and v4 projects. As previously noted, these updates are now outlined in the Quarterly Update and can be found in Addenda Database by using the Entry type filter and choosing "Form Update" from the dropdown menu. Users searching in the database should note that form updates are independent of the scheduled Quarterly Updates and released whenever changes are made, so some dates are earlier than the release date of the Quarterly Update.

For instance, all LEED 2009 and v4 BD+C and ID+C teams will benefit from the updates to the respective Minimum Energy Performance Calculators (for v2009 and v4) outlined in ID #5000062, which was updated in September 2016. In addition, BD+C: Data Centers and LEED 2009 data center projects will benefit from the updates to the Minimum Energy Performance Data Center Calculator outlined in ID #5000061. Teams working on O+M projects and using Case 2, Option 2 or Option 3 will benefit from fixes to the form outlined in ID #5000063. In addition for O+M projects, ID #5000064 provides a correction to the formula for weighted average for lamps in the Sustainable Purchasing Calculator.

July 2016 update

USGBC updated 6 offline calculators for LEED 2009 and v4. And thanks to feedback, USGBC is now publishing calculator updates in its Addenda Database along with a description of changes. USGBC will also publish a summary of changes as part of the Quarterly Addenda Update.
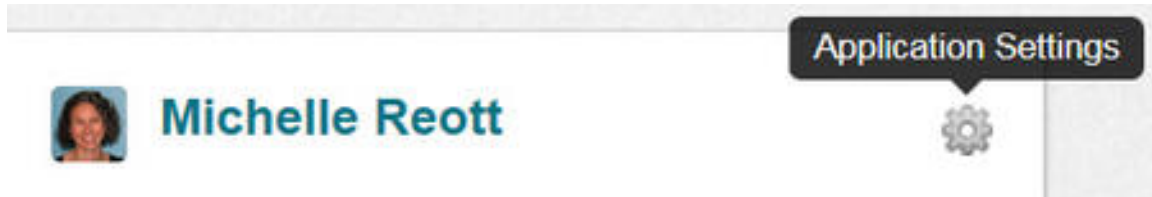
June 2016 update

Information LEEDuser posted about the LEED Online forms under January 2016 upgrades (see below) above didn't quite tell the whole story. That, as it turns out, was due to USGBC not sharing it.

Due to questions and concerns raised on this forum, USGBC has published an article to enumerate what the v06 forms upgrade really means for LEED 2009 and v4 projects. For experienced LEED Online users, the changes roll back some of the features you've learned to depend on and utilize under the previous LEED Online version 3. We've summarized and expanded on some of the issues raised in the article.
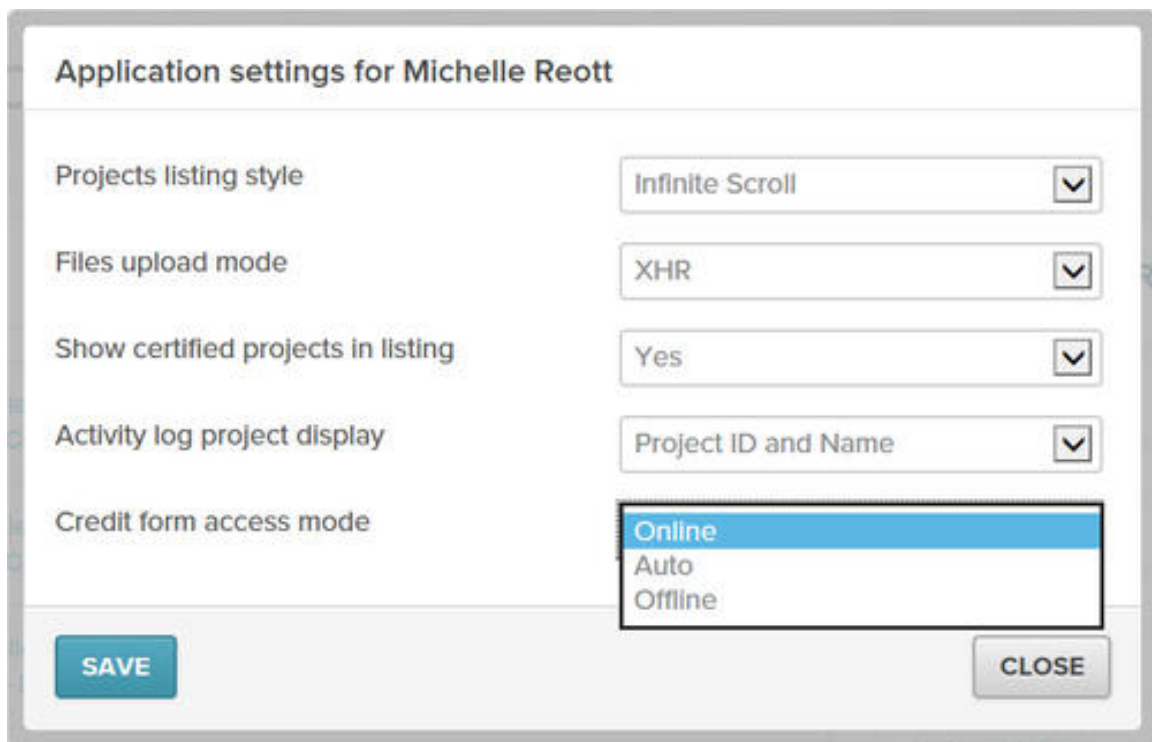
Forms upgrade also changed LEED Online functionality

Offline form functionality: Apparently users asked for this and they got it! (I'm not sure if it was folks harkening back to the LEED Online version 2 days when this was the way it worked or new users who wanted the ability to not be tethered all day to LEED Online.) Regardless, USGBC initiated many of the changes outlined below in the v06 forms update to ensure online and offline form functionality. Users can switch the way forms work via the credit form access mode.

Where is the credit form access mode and how do I switch? After you log into LEED Online, there is a gear icon that appears by your name on the first page. This lets you adjust a variety of settings in LEED Online:

The last item is where you can change the credit form access mode (Online, Offline, or Auto). "Online" is the default setting and the way you're used to working with the forms within LEED Online. "Offline" allows you to download an editable version of the credit form, which can be completed offline and then be uploaded to LEED Online. "Auto" allows LEED Online to decide which mode in relation to your browser configuration.

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USGBC also posted a new help question - How do I access the credit forms offline?, which explains in more detail how to work with the offline forms and answers some frequently asked questions about offline forms.

Linkages between forms are gone: Due to the streamlining of the v06 forms and the new ability to work offline on the forms, LEED Online no longer shares data (auto-populates) between forms. You will no longer see the yellow highlight from previous form versions that identified this linked content. This means that Project Administrators will need to cross-check items (like square footage and occupancy) that they've taken for granted were (mostly) coordinated since the release of LEED Online version 3.

Exemplary Performance for ID credits: Prior to the v06 forms update, Innovation in Design credits did not truly have their own PDF forms in LEED Online like other credits. Teams that were pursuing Exemplary Performance for SSc4.1, for example, identified this pursuit on the bottom of the SSc4.1 credit form and information flowed to a pulldown in the ID credits when the Exemplary Performance radio button was selected there. Now that ID credits have their own v06 forms and the linkages between forms have been removed, Project Administrators will need to track which credits are eligible for Exemplary Performance and initiate Exemplary Performance directly in the new v06 ID forms.

As noted under January 2016 (see below), these changes affect newly registered projects and newly attempted credits.

Upload button removed from forms: This is another big change that users will see. Previously the various uploads had numbers identifying them and you could upload directly from the Upload button on the form itself. Now, there are no upload numbers or specific upload areas related to those numbers. Users upload all items directly under Uploads button for each credit.

But how do I know what uploads are required? We heard a great idea for working with this new twist - multiple tabs in your web browser. Team members should consider having the credit form open in one browser tab and the Uploads page open in another. This will allow the user to refer back to the form while uploading documents and ensure all the required uploads have been included.

Will my uploads be cross-checked by LEED Online? No - Users will need to ensure that all required uploads have been included for a credit because the Check Form button (previously called Check Compliance) doesn't check upload quantity anymore. The button name change of Check Form sums it up - it is only checking the form data for completeness.

Perform an additional quality control check required: Project Administrators will need to check the form and ensure their team members have included all the required uploads.

Utilize the updating sorting feature in the Uploads page: Project Administrators can also use the sorting feature (by file name, credit number/abbreviation, uploader, or uploaded date) on the project's main Uploads page to help QC a project's uploads.

For additional information on uploading or deleting files using the v06 forms: Check out the new help question for an illustrated guide and additional uploading tips for LEED 2009 and LEED v4 - How do I upload or delete files using the new LEED Online forms?

Forms upgrade also relaxed some documentation requirements

Streamlined documentation requirements emulate LEED v4: As you start working with the v06 forms, you will notice that certain backup that you are used to providing is no longer required. For what I've noticed at a first glance, this will affect contractors' documentation for the MR material attribute credits (MRc3-7) and IEQ low-emitting materials credits (IEQc4.1-4.4) for LEED BD+C projects. Project Administrators should review the new forms to fully understand the impacts.

Precertification for Core and Shell projects is now the default stage

Precertification with a Split review (Precert + Split) is the new default stage for newly registered Core and Shell projects. You'll see "Precertification Preliminary Application" displayed as the stage on the right side of the grey navigation bar under the Project Name and ID # in LEED Online. Teams can also utilize a Precert + Combined timeline. If your project is not going for precertification, opt out of this optional stage via the Timeline tab and change your review timeline to one without precertification - either Combined or Split.

January 2016 upgrades

In early 2016 LEED Online underwent additional upgrades to provide new functionality. Here are some highlights:

- USGBC launched an upgrade to all forms used in LEED 2009 projects. Called the v06 forms release, these forms have the look and feel of the v4 forms with added campus and group functionality. Teams will use offline calculators that they will upload to LEED Online instead of entering data on the forms themselves to show credit compliance. We've included information on the specific new and revised calculators below. These v06 form updates affected projects where credits had NOT been attempted in LEED Online prior to December 24, 2015 when LEED Online went offline for scheduled maintenance. Team members can request v06 form updates for credits that were attempted via the Feedback button in LEED Online.
- To give project administrators on campus and volume certification teams increased control in their projects in LEED Online, USGBC introduced the "Access Rights" tab. Users with the authorization level of Project Administrator or Project Team Manager can assign users with the authorization level of Member one of three levels of access to each campus or volume project: View, Edit, and No Access. Note: Removing both View and Edit access will completely remove a team member's access to a project.
- LEED Core and Shell projects registered after January 4, 2016 have a new precertification worksheet, which replaces using credit forms during the precertification review phase. Project Administrators of projects registered before January 4, 2016 should contact USGBC for upgrade options.
- Already available to LEED v4 projects, now LEED 2009 (v3) projects registered after January 4, 2016 can choose International System of Units (SI units).

Author Michelle Reott of Earthly Ideas provides regular review of LEED Online updates, LEED Interpretations, and other specialized topics such as construction waste management.