



ACE Wizard Ltd

17B Somerset House
Hussar Court
Waterlooville
Hampshire
PO7 7SG

Telephone: 01420 446202

ACE Wizard User Guide

How to for guide for all building owner users

Revision 2.0

Date: Tuesday, 17 October 2023

Prepared for:

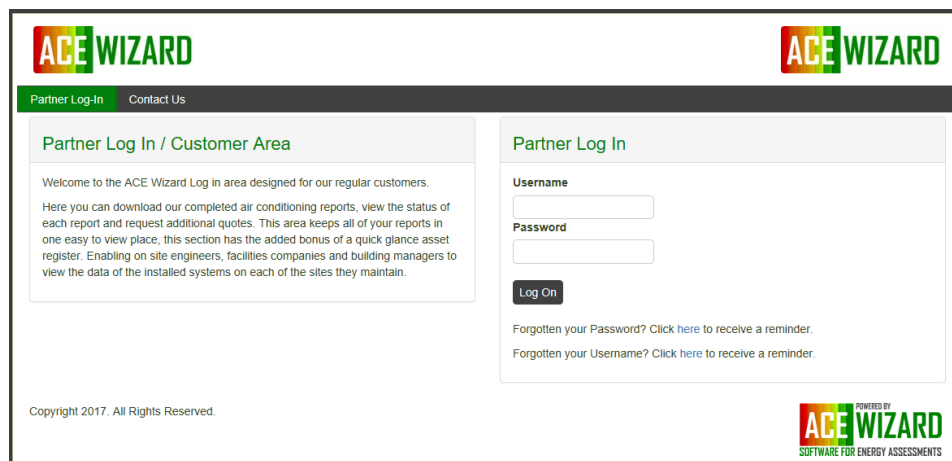
**Maintenance Users
Client Admin Roles
Read Only User**

Contents

Access & Navigation	3
User Access Details	3
Different Client Users	3
System Navigation	4
Managing your Account & Profiles in ACE.....	6
Maintenance User Functions.....	6
Recording F-Gas & PPM Visits	6
Adding Assets to a building/project	10
Adding AC Units & Chillers.....	10
Adding Internal AC Units	12
Add AHUs & HRUs:	13
Add Other Assets	13
Amending Assets in a building/project.....	15
Import A/C Units:.....	16
Running Data Reports & PPM / F-Gas Logbook Reports	17
Running Data Reports.....	17

Access & Navigation

ACE is available as a white labelled service with a firm specific URL, Colour Scheme and Logos replacing the default ACE schemes shown throughout this document. For all other users access to ACE Wizard is via the following URL;
[Log On \(acewizard.co.uk\)](http://Log On (acewizard.co.uk))



The screenshot shows the ACE Wizard web interface. At the top, there's a navigation bar with 'Partner Log-In' and 'Contact Us' links. The main content area is split into two columns. The left column, titled 'Partner Log In / Customer Area', contains a welcome message and a description of the area's functionality. The right column, titled 'Partner Log In', contains a login form with fields for 'Username' and 'Password', a 'Log On' button, and links for forgotten passwords and usernames. The footer includes a copyright notice and the ACE Wizard logo.

User Access Details

You will need a “Username / Partner Log In” and “Password” to access the system as shown. These have been provided below.

Username: _____

Password: _____

Different Client Users

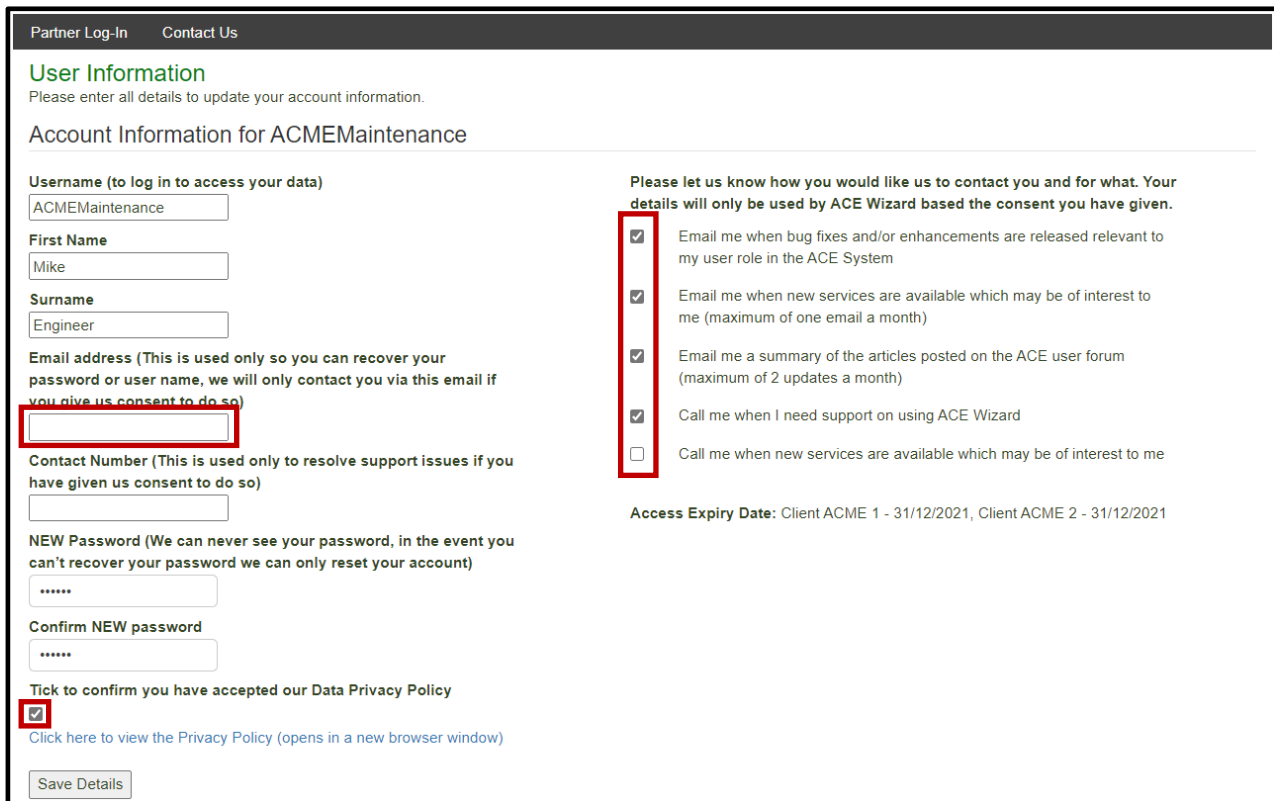
This document will primarily focus on the “Maintenance User” user role which allows a user to create, update, manage, records carried out on all systems recorded in a building (Project) for the purpose of capturing F-Gas and PPM visits in a project in ACE. The full list of client user roles in ACE includes.

- End User – Read only access of all data recorded either by an Energy Assessor producing a building energy report through ACE Wizard or a Maintenance User managing F-gas and PPM system records for a building (projects) linked to the client. The End User can run F-Gas reports and database reports on specific systems in a building and across all systems on all projects linked to their account.
- Client Admin – In addition to the End User role the Client Admin role allows the user to manage and maintain access to the client data in ACE.
- Assessment Firm Administrator – Allow an Assessment Firm to review and manage multiple assessments across multiple assessors across their clients.
- Maintenance User – in addition to the End User role the Maintenance role allows the user to add/remove/update system information on a site, and record/edit/delete F-Gas and PPM visit records for all asset types held in an ACE project.

The ACE Software is also a government approved TM44 Air Conditioning Energy inspection system to produce building energy compliance systems used by Energy Assessors across the UK and Ireland.

System Navigation

When you first log in to ACE, you will be asked to change your password, enter an email address for password & username recovery, accept the ACE Wizard Terms of Use and our Data Privacy Policy.



Partner Log-In Contact Us

User Information

Please enter all details to update your account information.

Account Information for ACMEMaintenance

Username (to log in to access your data)

First Name

Surname

Email address (This is used only so you can recover your password or user name, we will only contact you via this email if you give us consent to do so)

Contact Number (This is used only to resolve support issues if you have given us consent to do so)

NEW Password (We can never see your password, in the event you can't recover your password we can only reset your account)

Confirm NEW password

Tick to confirm you have accepted our Data Privacy Policy
☒

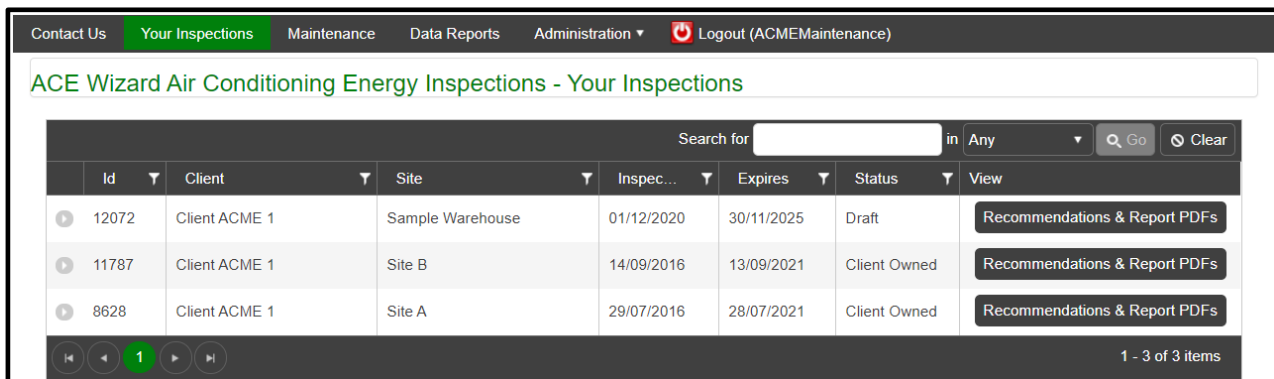
[Click here to view the Privacy Policy \(opens in a new browser window\)](#)

Please let us know how you would like us to contact you and for what. Your details will only be used by ACE Wizard based the consent you have given.

- ☒ Email me when bug fixes and/or enhancements are released relevant to my user role in the ACE System
- ☒ Email me when new services are available which may be of interest to me (maximum of one email a month)
- ☒ Email me a summary of the articles posted on the ACE user forum (maximum of 2 updates a month)
- ☒ Call me when I need support on using ACE Wizard
- ☐ Call me when new services are available which may be of interest to me

Access Expiry Date: Client ACME 1 - 31/12/2021, Client ACME 2 - 31/12/2021

Once logged in, all users will land on the “Your Inspections” page, this page shows all projects (buildings) created in ACE.



Contact Us **Your Inspections** Maintenance Data Reports Administration Logout (ACMEMaintenance)

ACE Wizard Air Conditioning Energy Inspections - Your Inspections

Search for in Any

	Id	Client	Site	Inspec...	Expires	Status	View
▶	12072	Client ACME 1	Sample Warehouse	01/12/2020	30/11/2025	Draft	<input type="button" value="Recommendations & Report PDFs"/>
▶	11787	Client ACME 1	Site B	14/09/2016	13/09/2021	Client Owned	<input type="button" value="Recommendations & Report PDFs"/>
▶	8628	Client ACME 1	Site A	29/07/2016	28/07/2021	Client Owned	<input type="button" value="Recommendations & Report PDFs"/>

1 - 3 of 3 items

Note: the following image is taken from an assessor who is also administrator for an assessment firm.

The tabs displayed are.

- **Contact Us** – shows ACE Wizard Ltd contact details for support services.
- **Your Inspections** – Shows all project data which has been handed over to the client or building energy reports which are ready for review and are shown in “Draft”.
- **Data Reports** – Allows the user to run reports against all project data captured across all buildings including Asset Lists, F-gas Logbooks, System Energy Efficiency Report and many more.
- **Administration** – Allows the user to manage their ACE account, and for the Client Administrator to manage user access.

Throughout ACE, further information can be seen by clicking the “Expander Triangles” shown in the green square to expand the visible information displayed to the user. The “Recommendation & Report PDFs” button will also open the project to provide further information on the building including all system data which is being used for the F-Gas and PPM records and the energy recommendations (where an energy report has been completed).

ACE Wizard Air Conditioning Energy Inspections - Your Inspections

Id	Client	Site	Inspec...	Expires	Status	View
12072	Client ACME 1	Sample Warehouse	01/12/2020	30/11/2025	Draft	Recommendations & Report PDFs
11787	Client ACME 1	Site B	14/09/2016	13/09/2021	Client Owned	Recommendations & Report PDFs
8628	Client ACME 1	Site A	29/07/2016	28/07/2021	Client Owned	Recommendations & Report PDFs

1 - 3 of 3 items

Users can use the “Expander Triangles” to drill into the building data for AC, AHUs, Other Assets, Internal Units (if entered) as well as review and print the recorded PPM and F-Gas visits.

ACE Wizard Air Conditioning Energy Inspections - Your Inspections

Id	Client	Site	Inspec...	Expires	Status	View
12072	Client ACME 1	Sample Warehouse	01/12/2020	30/11/2025	Draft	Recommendations & Report PDFs
11787	Client ACME 1	Site B	14/09/2016	13/09/2021	Client Owned	Recommendations & Report PDFs

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

Type: System Group: All Systems System(s): Select System(s)...

Asset I...	Unit Location	Area Served	Manufacturer/ Model	Output (k...	Condi...
01 Chiller	Chiller Compound	W/Wing Lecture Theatre and Meg Lab	York YCSA-100-T-3BOT	98	Reasonable

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

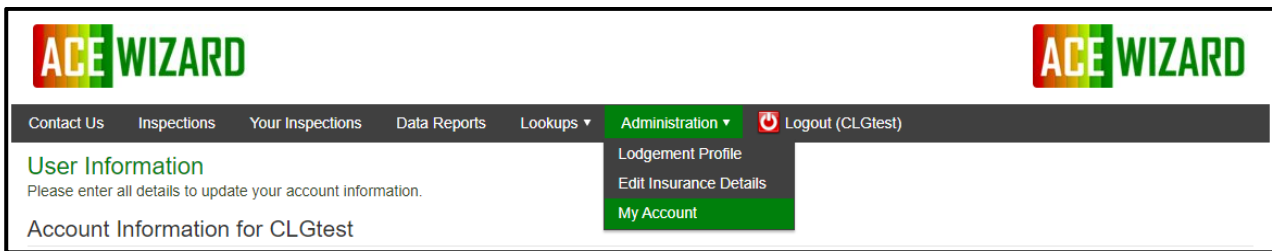
Total Refrigerant Weight: 55.00kg Serial Number: GWP Equivalent CO2: 97.6 tonne Required F-Gas Visits per Annum: 2
Gas Type: R407C

Print Unit F-Gas Log Book

Date...	Engineer Name	Maintena... Company	Comments	Refrigerant Added (kg)	Refrigerant Removed (kg)	Next Action
12/03/2021	Mike Engineer	ACME AC/FM Ltd	The following has been completed: External Condenser Cleaned, Refrigeration Pipework Condition Checked, Thermal Insulation Checked, External Fan Opera...	0	0	14/09/2021

Managing your Account & Profiles in ACE

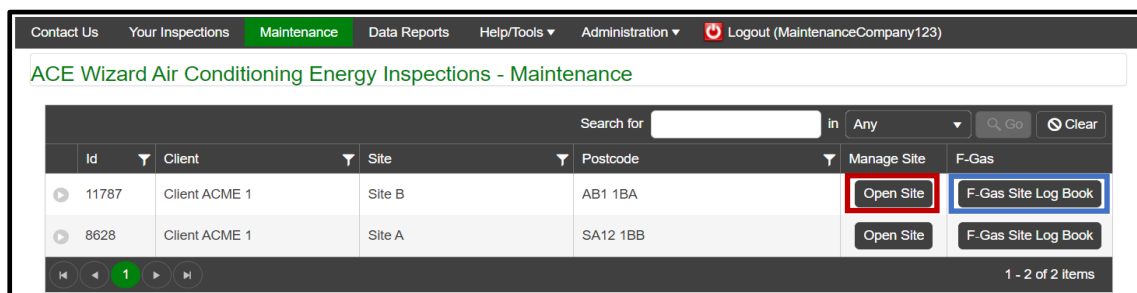
A user can maintain and modify their Username, Password, Recovery Email, and marketing preferences by selecting the “My Account” from the “Administration” menu.



Maintenance User Functions

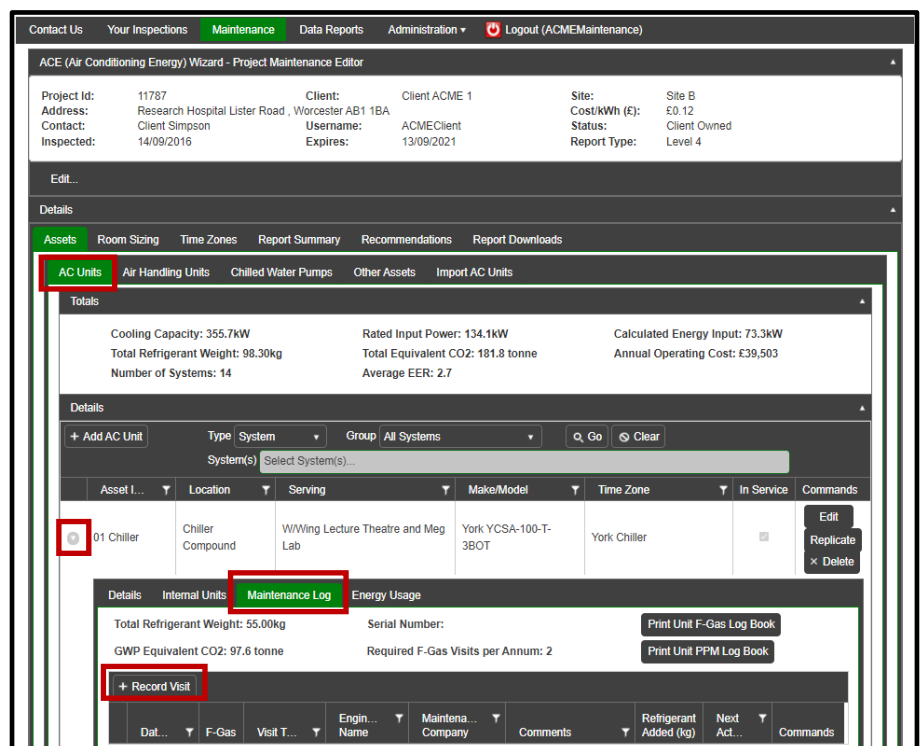
These instructions are also covered in a short training video on the ACE Wizard Website [How to record F-Gas Leak tests and PPM visits in the ACE... | ACE Wizard](#)

The “Maintenance” tab displays the data only on buildings which have a status of “Client Owned” as shown below. At this level, access to building information is set as read only. To record maintenance visits, edit or add systems to a building, the maintenance user can do so by clicking the “Open” button for a building. When at least one leak test for a site has been recorded, the “F-Gas Site Logbook” button will produce a live F-Gas Log book for a site/building.



Recording F-Gas & PPM Visits

Open the building you wish to record visits against, the page will be opened on to the asset tab, select the asset type you want to record a visit against either, AC Units, Air Handling Units or Other Assets. (Page will default to AC Units). In this example we are recording a Visit for an AC Unit. Click the “Expander Triangle” for the AC Unit you wish to add a visit record for. Select the “Maintenance Log” tab and click “Record Visit” button.



The Record Visit window will be shown as per the image below.

The screen will pull through the system details which is shown on the left.

Fill in the details on the righthand side. If the visit included an F-Gas leak test or gas added to a unit, tick the “F-Gas Leak Test Completed” box to activate the F-Gas record fields.

Note: The “Next Action Date” is not currently linked to any automatic updates but will appear in the F-Gas and PPM reports.

The common tasks completed as part of a maintenance visit can be selected by ticking the relevant tick box.

Additional engineers’ comments is a free text field, any comments made in this box will appear with the visit record along with the ticked ‘Tasks Completed’.

Note: The only mandatory field is the PPM Type which lists the visit type of ‘PPM – Main, PPM Interim, Breakdown or Other’ if you require more options please contact support@acewizard.co.uk

	System	Location	Serving	Manufacturer	Model	Type	Refrigerant	Factory Charge (kg)	Additional Charge (kg)	Total Charge (kg)	Equivalent CO2 (tonne)	F-Gas Leak Tests Per Annum
01 Chiller	Chiller Compound	W/Wing Lecture Theatre and Meg Lab	York	YCSA-100-T-3BOT	Air Cooled Chiller	R407C	55.00	0.00	55.00	97.6	2	

	Dat...	F-Gas	Visit T...	Engin... Name	Maintena... Company	Comments	Refrigerant Added (kg)	Next Acti...	Commands
	13/03/2021	<input checked="" type="checkbox"/>	PPM - Main	Mike Engineer	ACME AC/PM Ltd	The following has been completed: External Condenser Cleaned, External Fan Operation, Correct Operation Heating, Air On/Off Temperatures Checked, Cond...	0	13/10/2021	<div>Replicate to All AC Units</div> <div>Edit</div> <div>Delete</div>

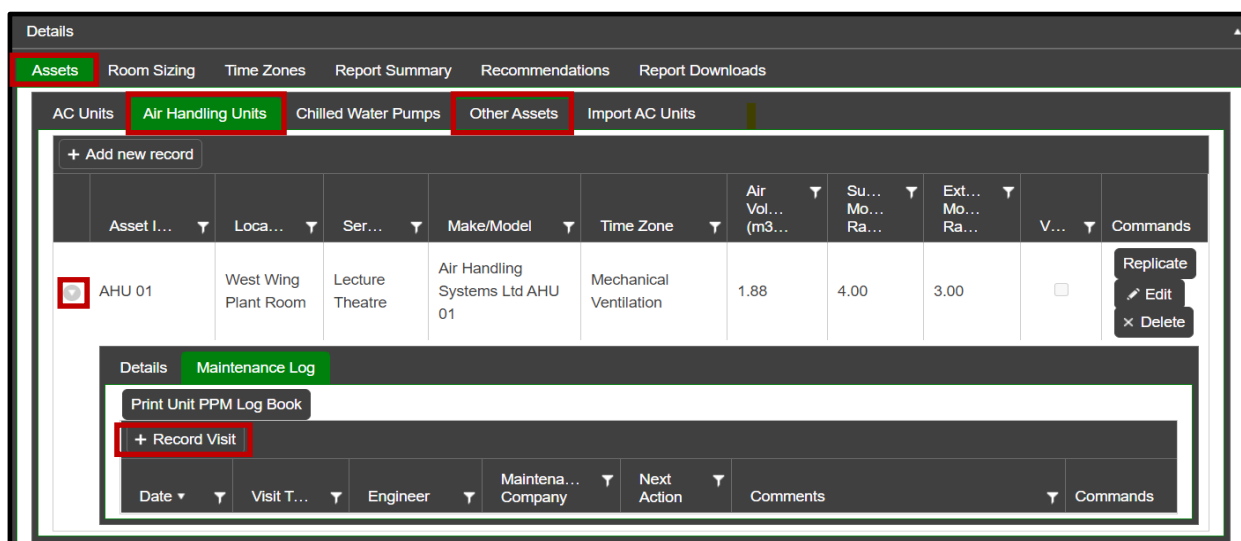
Once you have completed the form click update, all visit data will now show under the system you have recorded the visit against.

To replicate the visit record to all AC systems in the building click the “Replicated” button.

Note: Replicating a visit record of a system will only be replicated

to all systems of the same type, replicating a visit record for an AC Unit will not record the visit against and AHU or Other Asset.

To record a visit for “Air Handling Units” or “Other Assets” click on the corresponding tab from the “Asset” Tab and click the expander triangle for a unit the visit will be recorded against, click on the “Maintenance Log” tab before finally clicking on the “Record Visit” button.



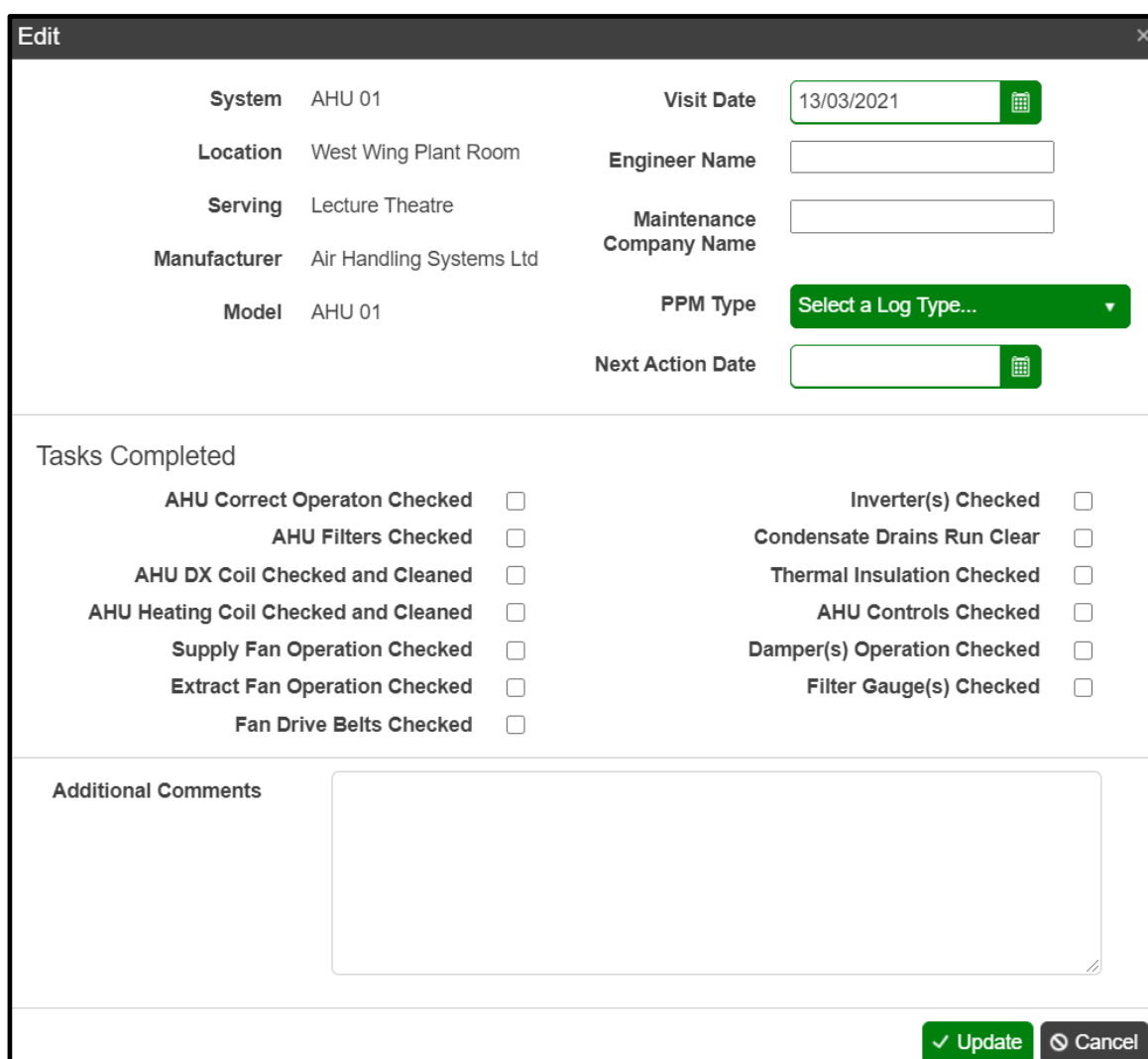
The screenshot shows the 'Assets' tab in the software. Under 'Air Handling Units', a table lists units. The first unit, AHU 01, is selected. Below the table, the 'Maintenance Log' tab is active, showing a '+ Record Visit' button.

Asset I...	Loca...	Ser...	Make/Model	Time Zone	Air Vol... (m3...	Su... Mo... Ra...	Ext... Mo... Ra...	V...	Commands
AHU 01	West Wing Plant Room	Lecture Theatre	Air Handling Systems Ltd AHU 01	Mechanical Ventilation	1.88	4.00	3.00		Replicate Edit Delete

Below the table, the 'Maintenance Log' tab is active, showing a '+ Record Visit' button.

Date	Visit T...	Engineer	Maintena... Company	Next Action	Comments	Commands
+ Record Visit						

The Air Handling Unit record card shown below, contains common task associated with maintaining mechanical ventilation system. Any task not listed can be recorded in the additional comments box.



The 'Edit' form contains the following fields and sections:

- System:** AHU 01
- Location:** West Wing Plant Room
- Serving:** Lecture Theatre
- Manufacturer:** Air Handling Systems Ltd
- Model:** AHU 01
- Visit Date:** 13/03/2021
- Engineer Name:** [Text Field]
- Maintenance Company Name:** [Text Field]
- PPM Type:** Select a Log Type...
- Next Action Date:** [Text Field]
- Tasks Completed:**
 - AHU Correct Operaton Checked ☐
 - AHU Filters Checked ☐
 - AHU DX Coil Checked and Cleaned ☐
 - AHU Heating Coil Checked and Cleaned ☐
 - Supply Fan Operation Checked ☐
 - Extract Fan Operation Checked ☐
 - Fan Drive Belts Checked ☐
 - Inverter(s) Checked ☐
 - Condensate Drains Run Clear ☐
 - Thermal Insulation Checked ☐
 - AHU Controls Checked ☐
 - Damper(s) Operation Checked ☐
 - Filter Gauge(s) Checked ☐
- Additional Comments:** [Text Area]
- Buttons:** Update, Cancel

The record visit card for “Other Assets” is shown below, as “Other Assets” can contain refrigerant, these systems may require leak tests and will appear in the F-Gas Logbook & Refrigerant/GWP reports only if a system has been set up with refrigerant. (see how to add or update “Other Assets”)

System

ASHP01

Visit Date

13/03/2021

Serial No

1212CV4A97000226

Engineer Name

Location

Underfloor Heating CCT

Maintenance Company Name

Serving

Roof

PPM Type

Select a Log Type...

Manufacturer

Delonghi

F-Gas Leak Test Completed

☐

Model

MICS - N/S 0152FF

F-Gas Certifying Body

Select a Certifying Body...

Type

Air Source Heat Pump

F-Gas Certificate Unique Number

Refrigerant

R410A

Factory Charge (kg)

13.30

Refrigerant Added (kg)

Additional Charge (kg)

0.00

Refrigerant Removed (kg)

Total Charge (kg)

13.30

Bottle Serial No

Equivalent CO2 (tonne)

27.8

Next Action Date

F-Gas Leak Tests Per Annum

1

Tasks Completed

Cold Room Condition Checked

☐

External Electrical Connections Checked

☐

Condenser(s) Coil(s) Cleaned

☐

Internal Electrical Connections Checked

☐

Evaporator Col(s) Cleaned

☐

Condensate Drain Runs Clear

☐

Set point Temperatures Checked

☐

Condenser Area Clear of Debris

☐

Correct Operation Checked

☐

All Surfaces Wiped Clean

☐

Fan Speed Controller Checked

☐

Running Amps Checked

☐

Defrost Heater Checked

☐

Extract Fan Cleaned

☐

Refrigeration Pipework Condition Checked

☐

Impeller Cleaned

☐

Thermal Insulation Checked

☐

Inverter Checked Correct Operation

☐

External Fan Operation

☐

System Checked For Errors

☐

Additional Comments

Update

Cancel

Adding Assets to a building/project

Assets can only be added to a building by a Maintenance User, there are 3 main asset types each with their own tab and one subcategory asset type under AC Units, these are:

- AC Units – Air Conditioning Condensers including Chillers, Splits, VRF/V, CRAC, CCUs and DX condensers serving Air Handling Units
 - Internal Unit – Used to record the internal evaporators linked to an external AC unit.
- Air Handling Units – Heat Recovery Units such as VAMs and Lossnay type systems and Fresh/heated or cooled Mechanical Ventilation Systems (AHUs).
- Other Assets – All other assets not covered in the categories above such as Boilers or Air Source Heat Pumps

Adding AC Units & Chillers

ACE has a database of over 25,000 AC/Chiller systems available to make adding new assets easier. To add an asset, click the “Add Unit” button in any of the Asset tabs (AC Asset shown below) – a training video is also available via the following link [Adding an AC Unit in ACE Wizard | ACE Wizard](#).

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

Asset ID – Please use a unique name for each system on a site such as your current asset tag or label the units AC01, AC02, AC03 etc.

Location – Is the area the external unit is sited such as ‘Roof’

Serving – If a room already exists in the project this can be selected via the drop down, if not, type the room or area name in the field.

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, type this in the **Make/Model** field. ACE will start to search our system database as you type, once selected the “Unit Details” section will populate with the known system data. *Note: If there is no matching system in the database, please follow the instructions on the next page.*

Time Zone – Select any option which best fits the type of operation.

Approximate Age & Condition – State the estimated year of install and general, if unknown please type ‘Unknown’. For Condition, please select an option from the drop-down list. ((Note: Condition Additional Description is not required to be filled in))

Serial Number – The serial number of the unit if known.

All details on the “Unit Details” side of the above image can be edited to align with the information found on site.

EER/SEER/COP/SCOP & Capacity Control – ACE Wizard will automatically populate these fields using the ACE system database. If the data is not known, these fields can be left blank.

Unit Details (Data Confirmed) – Indicates the system energy and refrigerant data has been confirmed by ACE Wizard against manufactures data.

Systems not in ACE Wizard database – When adding systems which are not in the database, select any system from the same manufacture and amend the “Unit Details” data on the right-hand side manually.

if you do not know the refrigerant weight for a system, you have the option to leave this field blank however this will mean the F-gas logbook will not show the system GWP.

Note: You can also learn how to add systems not in the ACE database by clicking the following link. [Adding an AC unit which is not in the ACE Wizard database | ACE Wizard](#)

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 “Asset ID” name has a suffix of “001”. This is to prevent an asset ID being used more than one for each building.

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 system type.

Adding Internal AC Units

Select the AC Unit you wish to link the internal unit to and click the expander triangle shown below, click on the 'Internal Unit' Tab and then click the 'Add new record' button.

The screenshot shows the 'Details' tab of the software interface. The 'AC Units' sub-tab is selected, and the 'Internal Units' sub-tab is also selected. The 'Add new record' button is highlighted with a red box. The interface displays various fields for adding a new internal unit, including Asset ID, Manufacturer, Model, Type, Serial Number, Location, Use ACU Room Details, Approx Year Installed, and In Service status.

The page will pull through the core details from the external AC asset the internal unit is being linked to, these fields can be changed if required.

Once the internal asst data has been filled in click update to save the record. Or click Update & Replicate if there are multiple internals of the same model linked the external AC Unit.

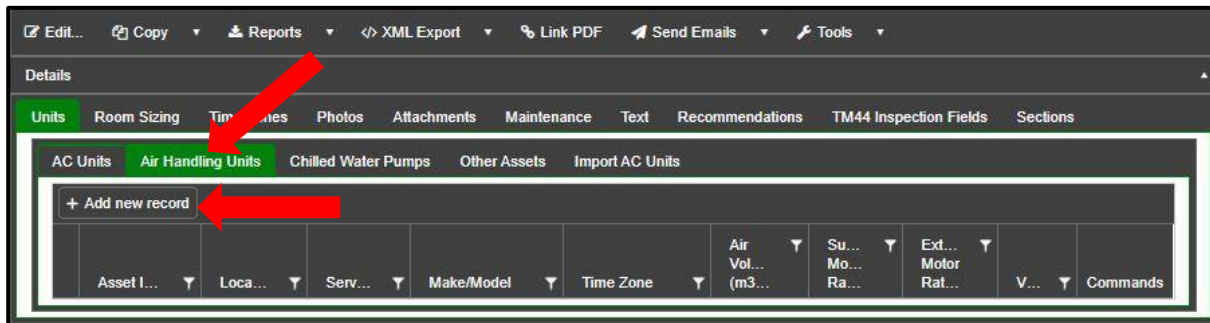
The 'Edit' dialog box is shown, allowing users to modify the details of an internal unit. The fields are as follows:

- Asset ID**: [Empty text box]
- Manufacturer**: [Daikin]
- Model**: [Empty text box]
- Type**: [Select an Internal Unit Type...]
- Serial Number**: [Empty text box]
- Location**: [IT Rooms]
- Use ACU Room Details**: ☒
- Approx Year Installed**: [2005]
- In Service**: ☒

At the bottom, there are three buttons: **Update** (with a green checkmark), **Update & Replicate**, and **Cancel**.

Add AHUs & HRUs:

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



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 system 'Location' such as roof and 'Area Served' such as First Floor Offices.

The “Area Type” drop down menu has a list of the most common areas with the estimated required air changes per hour.

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.

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.

Note: How to add an AHU/HRU to an ACE project is available by clicking the following link, [Adding an AHU or an HRU to an ACE project | ACE Wizard](#)

Edit

Asset ID: AHU 01

Location: Roof Plant

Area Type: Offices [6-10 ACH/hr]

Manufacturer: Trane

Approximate Age: 2001

Supply Air Volume (m3/s): 5.60

Supply Motor Rating (kW): 15.00

Extract Motor Rating (kW): 7.50

Fan Power De-Rated (%): 70

AHU Type: Central mechanical ventilation (in...)

In Service: ☒

Area Served: office

Model (if required):

Time Zone: Mechanical Ventilation

Extract Air Volume (m3/s) (if required):

Supply Speed Controlled/VSD: ☒

Extract Speed Controlled/VSD: ☒

Heat Recovery: Re-circulation Dampers

Building Age: Pre-2010

Data Confirmed: ☐

Applicable Room Volume (m3): 2016 - 3360

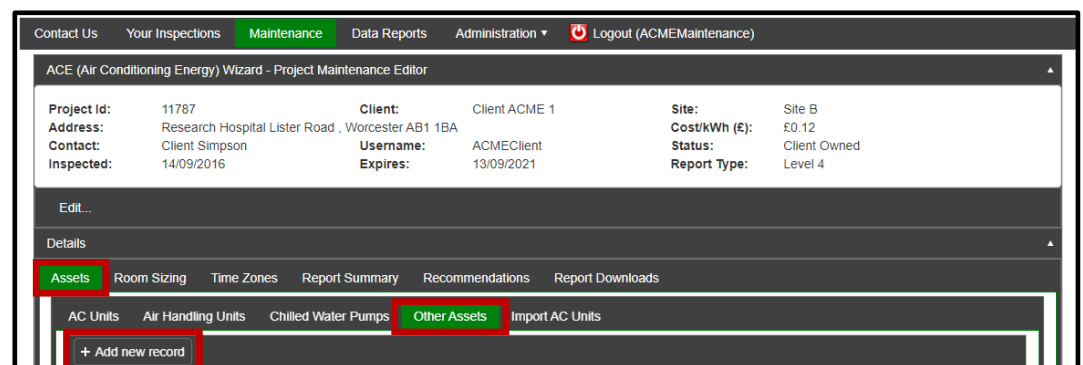
Building Reg Expected SFP (W/(l/s)): 2.20

SFP (W/(l/s)): 2.81

☒ Update

Add Other Assets

Click on the 'Add new record' from the 'Other Assets' tab.



As with all assets, assign a unique Asset ID and then select the 'Asset Type', to increase the asset type options please email support@acewizard.co.uk with your request. If the manufacture does not appear in the drop down list you can simply type the name you wish to enter.

If the 'Other Asset' contains F-Gas which you wish to show on your F-Gas log book please tick the 'Contains Refrigerant Gas' box, this will enable the Refrigerant fields to be filled in.

Once you have filled in the page click 'update'.

Edit

Asset ID

Type

Room

Location in Room

Manufacturer

Model

Approx. Year Installed

Serial Number

kW Input

In Service ☒

Contains Refrigerant Gas ☐

Refrigerant

Refrigerant Weight (kg)

Additional Refrigerant Weight (kg)

Notes

Note: It is not currently possible to create a Project/Building under the Maintenance User Role. To create a new Building record please email support@acewizard.co.uk. With the Building Name & Address.

Amending Assets in a building/project

All assets can be edited by a Maintenance User, there are 3 main asset types each with their own tab and one subcategory asset type.

- AC Units – Air Conditioning Condensers including Chillers, Splits, VRF/V, CRAC, CCUs and DX condensers serving Air Handling Units
 - Internal Unit – Used to record the internal evaporators linked to an external AC unit.
- Air Handling Units – Heat Recovery Units such as VAMs and Lossnay type systems and Fresh/heated or cooled Mechanical Ventilation Systems (AHUs).
- Other Assets – All other assets not covered in the categories above such as Boilers or Air Source Heat Pumps

To edit an asset, click on the “Maintenance” tab and click the “Open” button for the building you wish to amend the asset on.

The screenshot shows the 'Maintenance' tab in the ACE Wizard interface. At the top, there's a navigation bar with 'Contact Us', 'Your Inspections', 'Maintenance' (highlighted), 'Data Reports', 'Administration', and 'Logout (ACMEMaintenance)'. Below this is a search bar and a table of assets. The table has columns: Id, Client, Site, Postcode, and Manage Site. Two rows are visible: one for Site B (ID 11787) and one for Site A (ID 8628). Both rows have an 'Open Site' button highlighted with a red box. At the bottom right, it says '1 - 2 of 2 items'.

Select the “Asset Type” and click the “Edit” button of the asset you wish to edit. *Note: to edit the internal unit linked to an AC system click on the “Expander Triangle” of the asset.*

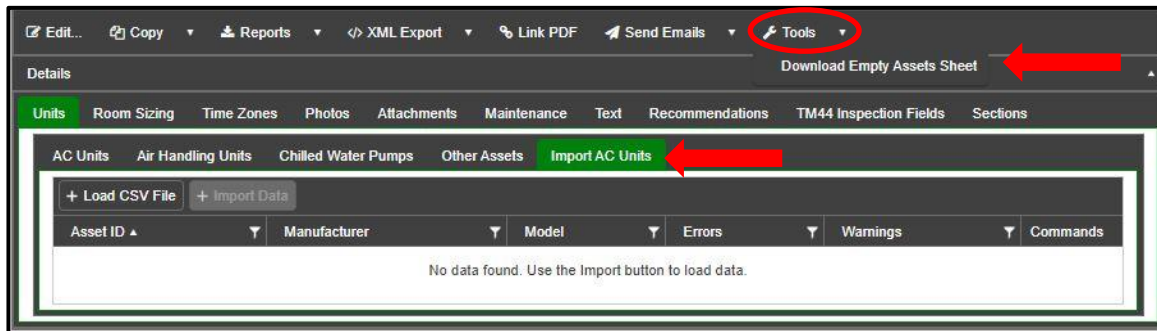
The screenshot shows the 'Assets' tab in the ACE Wizard interface. The 'AC Units' sub-tab is selected and highlighted with a red box. The main area displays 'Totals' for the selected asset type, including Cooling Capacity, Rated Input Power, Calculated Energy Input, Total Refrigerant Weight, Total Equivalent CO2, Annual Operating Cost, and Number of Systems. Below this is a 'Details' section with a search bar and a table of assets. The table has columns: Asset ID, Location, Serving, Make/Model, Time Zone, In Service, and Commands. One row is visible for Asset ID AC 01456, with an 'Edit' button highlighted with a red box. Below the table, there's a section for 'Internal Units' with a table of internal units. The first row is for INT-01, with an 'Edit' button highlighted with a red box.

All fields can be amended in the same way a unit is added, once you have made the required changes click ‘Save/Update’. Assets can also be deleted; however, you are not able to recover a deleted asset and any linked records including Internal Units and PPM/F-Gas Visit Records will also be deleted.

Import A/C Units:

If there are no assets recorded for a building, ACE allows the external AC Units to be uploaded to prepopulate the core AC unit data as possible.

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	22332U000	Single Split	2001	R410A	5.6		Good	Good	Good	Yes	Leaves rear of coils
AC 02	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	22332U001	Single Split	2002	R410A	6.6		Good	Good	Good	Yes	Leaves rear of coils
AC 03	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	22332U002	Single Split	2003	R410A	7.6		Good	Good	Good	Yes	Leaves rear of coils
AC 04	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	22332U003	Single Split	2004	R410A	8.6		Good	Good	Good	Yes	Leaves rear of coils
AC 05	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	22332U004	Single Split	2005	R410A	9.6		Good	Good	Good	Yes	Leaves rear of coils
AC 06	Roof	Office	Mitsubishi	PUHZ-ZRP100VKA	22332U005	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 you double check these to ensure the data is correct. In the case below the refrigerant weights differ from the database figures.

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.

Running Data Reports & PPM / F-Gas Logbook Reports

There are 2 types of pre-configured reports available to users in ACE Wizard, these can be split in to 2 categories.

- Data Reports – which compiles data from all projects/buildings and can be exported in the Excel. Many of these reports relate to the governments mandatory TM44 Air Conditioning Energy Inspections for buildings in the UK with cooling systems installed with a combined cooling capacity of 12kW. These inspections are required every 5 years and the data reports in ACE allow for firms to extract the data capture during these energy assessments to help identify energy saving opportunities to help improve their carbon emissions.
- F-Gas & PPM Logbooks – These provide PDF output of the visits and leak tests on a building or systems within a building.

Running Data Reports

There are 11 preconfigured database reports these are,

- AHU Data – Shows the energy performance data including Specific Fan Power of AHUs installed.
- Areas & System Sizing – Highlights where systems are potentially under or oversized for the area served by the systems. (Data will only show on sites which have had a TM44 Air Conditioning Energy Inspection)
- Asset List – A full single or multi building report of all assets recorded in a building.
- Reports by Expiry Date – Shows the renewal date of the building TM44 Air Conditioning Energy Certificate (Data will only show on sites which have had a TM44 Air Conditioning Energy Inspection)
- F-Gas Site Logbook – Displays the last leak test carried out on all systems recorded in the software, can be run across single or multiple buildings.
- Refrigerant, GWP & F-Gas Data – Displays data of all systems recorded in ACE use in an F-Gas logbook and to see the total
- System Energy Efficiency Rating
- Recommendations (Energy and cost saving data will only display if the ACE Advanced Energy report has been completed)
- AHU Data
- Areas & System Sizing
- Operational Cost (Energy and cost saving data will only display if the ACE Advanced Energy report has been completed)
- Key findings Report.