



DGNB System Software International User Manual

Guide

(Status: February 2024)

Please note the information on project registration
before officially registering projects

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1. Finding the DGNB System Software

The DGNB System Software is a web application that can be used with any standard browser and operating system. It can be accessed at the following web address: <https://software.dgnb.de/>

The software works on all common browsers:

- Mozilla Firefox
- Google Chrome
- Microsoft Edge
- Apple Safari

2. First Steps

2.1 DGNB User Account and Login

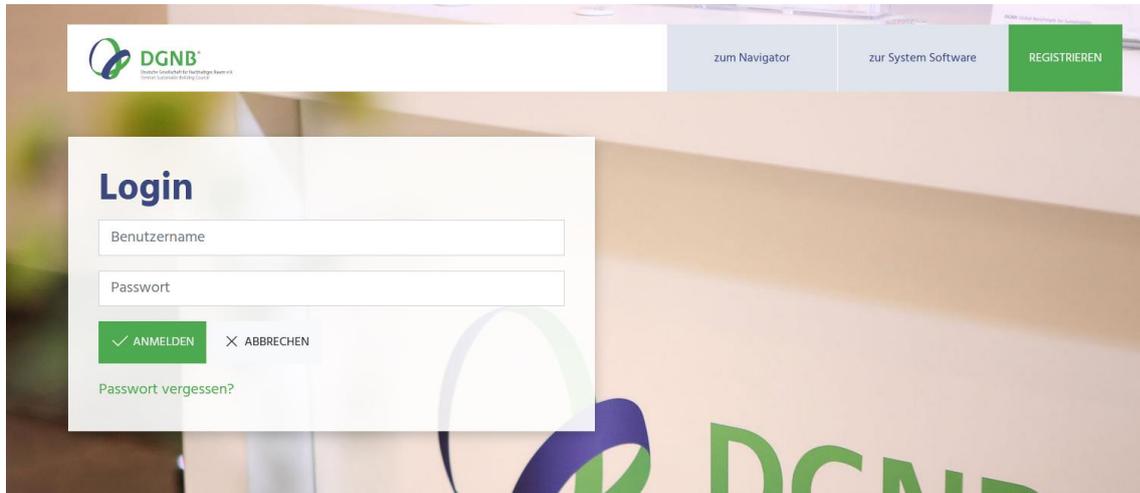
To have access to the System Software, you have to have a DGNB User Account. You can register yourself by clicking on the top right of the homepage under 'Login' and then 'Registrierung', or you may change language first, German (DE) to English (EN).



The following form will appear:

This form must be filled out and then sent. You will receive an e-mail to confirm your registration. After successful confirmation, you can log in to the application.

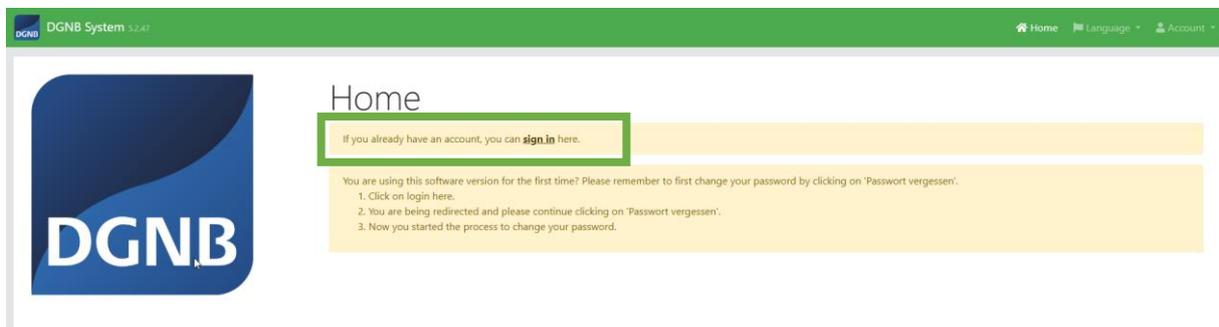
Important: If you are an International DGNB Consultant or Auditor, your account is already created. If you are logged in for the first time, please use the “forgot password” method.



3. Creation and registration of projects

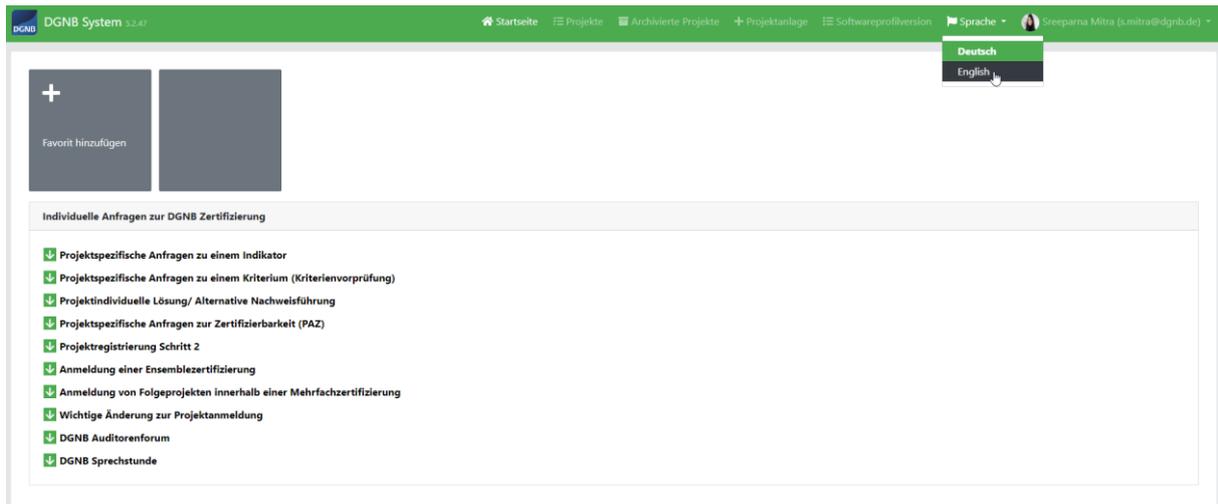
3.1 Language change to English

If you are **not** logged in already, you will land on the start page below. Please change the language to English by clicking on the top right corner under 'Sprache' and then sign in when directed to the next page:

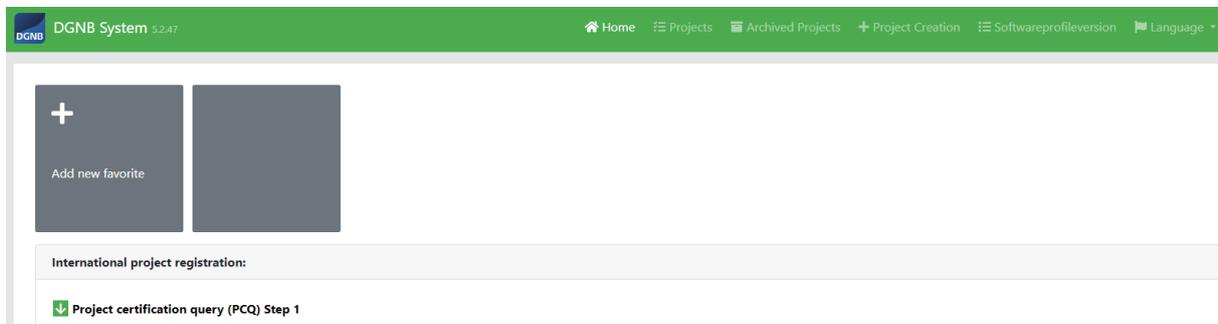


Note: language change (from DE into EN) will influence the content of the page, e.g. some irrelevant information for the international use will be hidden.

If you are logged in already, you will directly land on this page below:



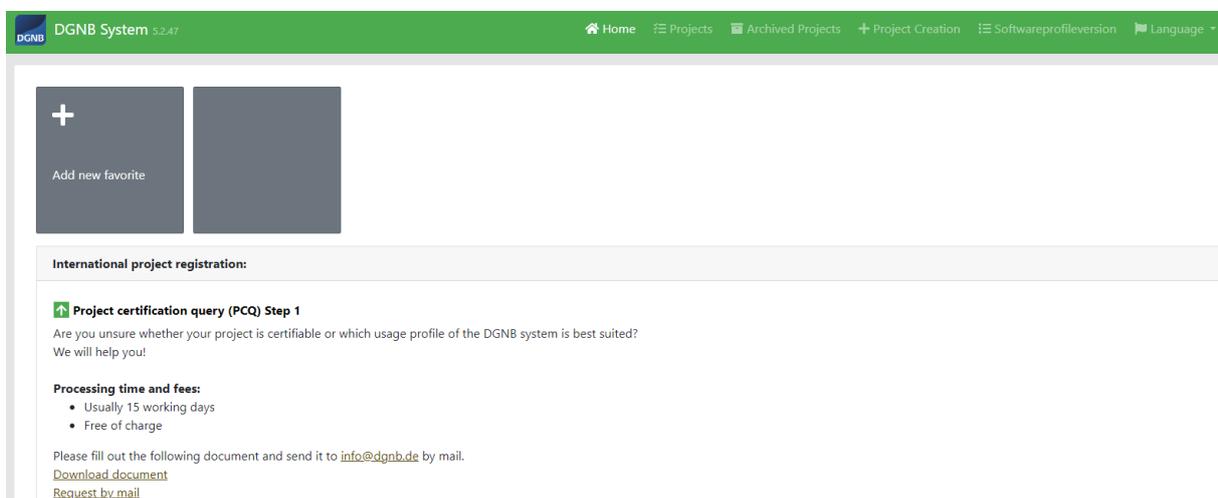
You can change the language to English clicking on the top right corner under 'Sprache':



3.2 Project Certification Query - PCQ (or PAZ for German)

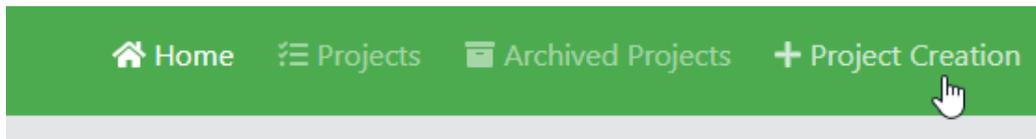
The Project Certification Query (PCQ) is required for all international Projects. Through the PCQ you should describe the project details and only then all necessary follow-up information can be provided. Also, you should use the PCQ form to clear all ambiguities and questions regarding the project, before registering it. Pay attention, that project registration automatically triggers the process of the contract creation, which is a subject to costs (see certification [fee structure](#)).

Please download the PCQ form by clicking on 'Download document'. You are required to fill this form and sent it to info@dgnb.de. Once you have sent this, you will be contacted by the DGNB office and provided with a PCQ number. After this, you can start the project registration process.



3.3 Project Creation/Registration

Registration takes place via the 'Project Creation' tab.



The project creation consists of several important steps. As you proceed with the 'Project creation', you will see the following pages (Please note, the following screenshots are just a few examples which might differ based on your selections):

1. Application

Application

What do you want to certify

(S)

Buildings (S)

Interiors (S)

Districts (S)

[Next](#)

2. Construction phase (for buildings)

Construction phase

In which construction phase is the building

Inventory (S)

In Use (S)

New Construction (S)

Deconstruction (S)

Renovation (S)

[Back](#) [Next](#)

3. DGNB Scheme (building usage profile)

Usage

Please select the appropriate usage

Educational buildings (S)

Offices (S)

DGNB Flex (S)

Department stores (S)

Healthcare buildings (S)

Hotel buildings (S)

4. Type of certification

Type of certification

Please select the certification

Individual certification (S)

Multiple certification (S)

Recertification (S)

Back Next

5. Certificate type

Certificate

Please select the desired certificate

Certificate (S)

Back Next

6. System Version

Version

Which certification version

2020 (S)

2020 (International) (S)

Back Next

Important: for international projects, please select the system version with the marking – ‘(International)’, in this case (screenshot above) it is the system version 2020 (International) for existing buildings (or buildings in use). This is important to ensure that the project is registered correctly, otherwise, it will be registered under the German system version, creating German contract and fee structure.

Please note, that if you make a wrong selection, it is possible to click on ‘Back’ and change your selection.

3.4 Create Project without registration

After you have proceeded with the steps mentioned in the previous section, you should land on a summary page like the one below. Please check that all your selections are correctly mentioned in this page. After this you can proceed to add a Project name in the space provided:

Project creation

You have made the following selection

Application:	Buildings
Construction phase:	In Use
Usage:	Educational buildings
Type of certification:	Individual certification
Certificate:	Certificate
Version:	2020 (International)
Scheme:	
Project name: *	<input type="text"/>

Back Create project **Project creation without registration**
The project can be registered later **Project creation with registration**
Start certification (subject to costs) Register project

After this, you can **choose** between **'Create project (project creation without registration)'** or **'Register project'** (more information about this can be found in another section below). The 'Create project (project creation without registration)' allows you to create a project beforehand without official registration (e.g. for pre-assessment, communication with client etc.) to register it at a later time. As a consequence, you can create the so-called Quick-Check projects independently, without any involvement of the DGNB. The 'Register project' on the other hand, registers your project immediately.

Important: the 'Register project' will register your project officially which is subject the creation of a contract and fees.

3.4.1 Base data

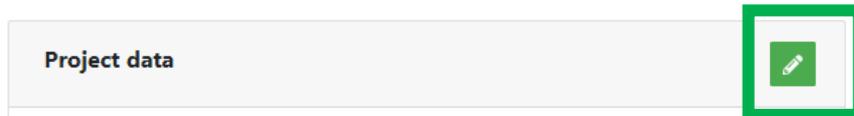
Once you click on the 'Create Project (without registration), you should be able to see the following page under the 'Base data' window:

Base data Project view Criteria view

Revoke project Register project (subject to costs)

Scheme & certification	Project data	Project contact person
Application : * Buildings	Name : * LE_test	Responsible : * Responsible name
Construction phase : * In Use	Project number:	Responsible e-mail
Usage : * Educational buildings	Proposal number:	Project owner: Levan Ekhaiva
Type of certification : * Individual certification	Project status: Project draft	Lekhvaia@dgnb.de
Certificate : * Certificate	GFA : * 0	Auditor : * Auditor name
Version : * 2020 (International)	UA : *	Auditor e-mail
Scheme : * Buildings In Use, Version 2020	Submission date verification documents certificate : * 0	
	dd.mm.yyyy	Supporters and external assessors

Here, some data of the project is already pre-filled. You may fill in the remaining data by clicking the edit icon as shown below (or skip this step, see 'project view' chapter below):



Compulsory data are:

Project data

- GFA (gross/total floor area)
- UA (Usable area)
- Submission date verification documents certificate
- Street, No
- Postal code
- Location
- Country
- Completion date
- PCQ number** (please check section 3.2)
- Certificate submission type
- ESG verification

Project contact person

- Contractual party/applicant (The party commissioning the certification, who signs the contract with the DGNB and a legal representative of the applicant) - name, email
- Person responsible for the project (Project manager i.e. this person accepts contracts and invoices, for example, and is therefore the central contact person for the DGNB) - name, email
- Auditor (A person who is assigned to audit the project) - name, email

On the top right, you can also see buttons in which you can register the project at any stage or revoke if needed.



3.4.2 Project view

On the top left, beside the 'Base data', you will find the 'Project view'.



In this page, you will find the project summary, as you fill in the required criteria, the results will be displayed in the assessment pie chart, or so called DGNB evaluation 'flower':

Base data **Project view** Criteria view

Scenarios **Basisszenario** Ready for audit 21.02.2024 17:11:05 Rating status **0.0%** Bronze Silver Gold Platinum DGNB

Project parameters

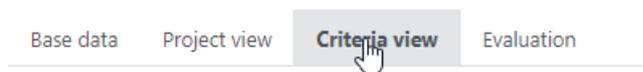
Name: LE_test
 Project number: -
 Auditor: -
 Active Scenario: Basisszenario
 Type of project: Unregistered project
 Type of certification: Please select a phase
 Status: Project draft
 Scheme: Buildings In Use, Version 2020
 Profile version: Revision 1.2 (13.02.2024)
 Parent project: -

Project management

- Audit report
- Assessment report
- Export
- Auditeam management
- Lock
- To parent project
- Create ToDo
- List of ToDos
- Copy scenario
- Confirmations
- Compare scenario

3.4.3 Criteria view

On the top left, beside the 'Project view', you will find the 'Criteria view'



In this page you will find all the criteria listed relevant to certain scheme or certification version, in our example: System version 2020 international – Building in Use scheme. Beside the criteria list, all schemes also include the line with 'General information', on the top of the list:

Criteria	IS CLP	MAX CLP	Limit value	Performance index
General Informations				
GENERAL General Information	0.00	0.00	0.00	0.0%
Environmental Quality				
ENV1-S Climate Action and Energy	0.00	140.000	0.00	0.0%
ENV2-S Water	0.00	110.000	0.00	0.0%
ENV3-S Materials and Recycling	0.00	110.000	0.00	0.0%
Economic Quality				
ECON-S Operational Costs	0.00	120.000	0.00	0.0%
ECON-S Risk Management and Long-term Asset Value	0.00	100.000	0.00	0.0%
ECON-S Procurement and Operations	0.00	105.000	0.00	0.0%
Sociocultural and Functional Quality				
SOCT-S Indoor Comfort	0.00	112.000	0.00	0.0%
SOCT-S User satisfaction	0.00	105.000	0.00	0.0%
SOCT-S Mobility	0.00	110.000	0.00	0.0%

If you click on a certain criterion, you will be directed to an 'evaluation' page of this certain criterion, where you can evaluate and submit proof documents (the same can be done directly from the DGNB flower by clicking on the criteria names on the edge of the circle).

See the screenshot of one exemplary criterion content below:

Base data Project view Criteria view **Evaluation**

Scenarios **Basiszenario** Ready for audit 21.02.2024 17:11:05 Rating status 0,0%

35% Bronze 50% Silver 65% Gold 80% Platinum DGNB

ECO1-B

Operational Costs

Performance index: 0,0%

CLP estimation: 0

Checklist points (CLP): 0,00 / 120,00

Parameters: 0 / 12

CLP threshold: 0

CLP minimum value: 0

Indicators

1. Management: Plan

2. Management: Do

1.1. Target agreement (target value)

A target agreement for the operating costs has been defined.
The target agreement for the operating costs is based on target values, which

- the requirements were not fulfilled (0)
- were determined internally (10)
- were based on data from several comparable buildings or data from a technically innovative building or external benchmark data (15)

Please upload proof documents for indicator 1 "Management: Plan" here

Please upload proof documents for indicator 2 "Management: Do" here

Please upload proof documents for indicator 3 "Management: Check" here

3.5 Project Registration

Project creation

You have made the following selection

Application: Buildings

Construction phase: In Use

Usage: Educational buildings

Type of certification: Individual certification

Certificate: Certificate

Version: 2020 (International)

Scheme: Buildings In Use, Version 2020

Project name: *

Back Create project **Project creation without registration**
The project can be registered later

Project creation with registration
Start certification (subject to costs) Register project

If you click on the 'register project' button, you will be asked to enter the project data. This is mandatory information that is relevant for drawing up the contract, such as the gross floor area (GFA) and the usable floor area (UA). There are optional and mandatory details. Mandatory details are marked with a star:

Gross floor area (in m²) *

Before providing the project data, it is important to read the instructions carefully and follow them accordingly.

You have made the following selection Download guideline

Application:	Buildings
Construction phase:	In Use
Usage:	Educational buildings
Type of certification:	Individual certification
Certificate:	Certificate
Version:	2020 (International)
Scheme:	Buildings In Use, Version 2020
Project name:	SM_test

Hints

Power of attorney for project registration
A power of attorney is required if you, as the person responsible for the project, do not work at the applicant's company. Please download the **Power of attorney document** and send it signed to system@dgnb.de. This is a requirement to complete your project registration.

Requirements for DGNB certification
By registering your project, you confirm that the **Requirements for certifiability** for the project are fully known to you and to the DGNB auditor.

Project registration using an earlier version
Projects must always be registered using the latest version. Projects that were pre-certified with an older market version may still be registered using the pre-certification version. However, we recommend upgrading to the latest market version.

Registration for an ensemble certification
Register the main project using this form. To complete the registration afterwards, please fill out **this document** and send it to system@dgnb.de.

Important: Information of an applicant and the responsible person for the project (Project manager) is mandatory. A DGNB auditor, can also register the project instead of an applicant, but in this case, **applicant must already be registered in the software and at least once successfully logged into the account BEFORE the project registration**, otherwise, the person won't be recognized from the system software.

Information about the contractual party / applicant

Company / Institution *

Person Responsible for the project: *




For a successful registration, the e-mail addresses of the project participants (with which they have registered with the DGNB System Software) must be known. Project participants are added with the e-mail addresses. This applies to the following project participants:

- Auditor
- Auditor 2 (optional)
- Contractual party / applicant i.e. the party commissioning the certification, who signs the contract with the DGNB and a legal representative of the applicant
- Person responsible for the project (Project manager) i.e. this person accepts contracts and invoices, for example, and is therefore the central contact person for the DGNB

Once all project relevant data completed, the project registration can be finalized.

Add User ×

Email:

Would you like to add this User?

Firstname: Sreeparna

Surname: Mitra

Email: s.mitra@dgnb.de

add
cancel

After you click on 'Complete project registration',

Complete project registration

the project is loaded and you are in the 'Base data' tab.

The project will then have the status 'in registration' (instead of 'project draft'). This means that the DGNB office will check the project data and assigns a project number. Once this process has been completed and certification has been started, the main auditor and the project owner(s) will receive an automatically generated mail informing them that the project has been successfully registered and that processing can begin. The project status automatically changes to 'Ready to audit'.

The project registration is **only** subject to a fee once the contract has been signed.

3.6 Short Schemes

Not all schemes are fully available in the system software. For various international certification schemes e.g. the New Building Certification or Building Renovation, where the flexibility/adaptability of criteria to country specific requirements is crucial, DGNB provides so called 'short scheme'. In the so called 'short scheme', you won't find a complete questionnaire (individual indicators), but only one major input box for criterion. For instance, if the Auditor in the process of the country adaptation needs to delete/modify one indicator, it should not cause structural changes in the system software, thus the criterion assessment is designed to be only on the criterion level and not on individual indicator level. Almost every criterion has an individual calculation rule, e.g. some indicators are to be interpolated some must be added or aggregated etc. thus, to simplify the point calculation for individual criterion, the excel assessment matrix will be available in the system software.

The rest of the certification process is the same as for usual projects.

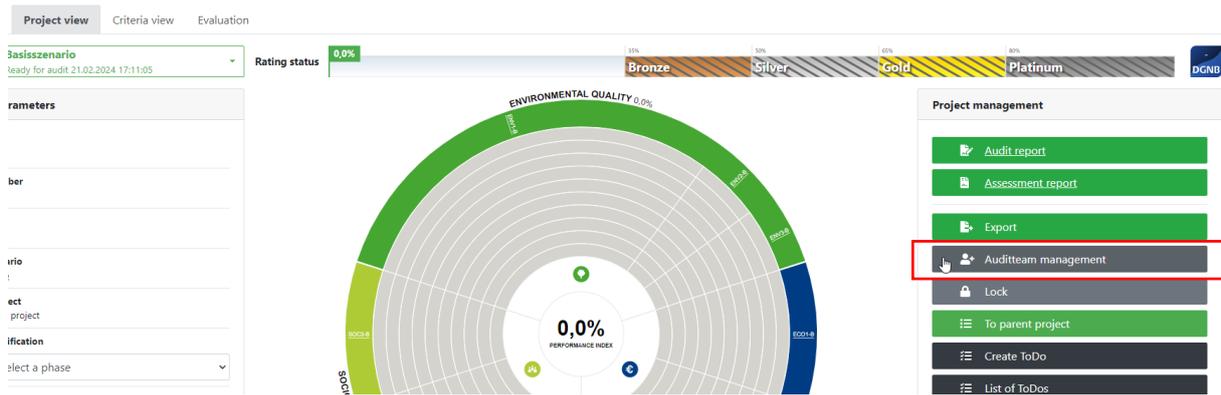
3.7 Registration of follow-up projects in the multiple certification

Please contact the DGNB to create and register follow-up projects for multiple/serial certifications.

In addition, **only the main auditor of the basic certificate (BC)** can copy the projects. However, before registering and copying the follow-up project, pay attention that the certification system version of the BC is not outdated.

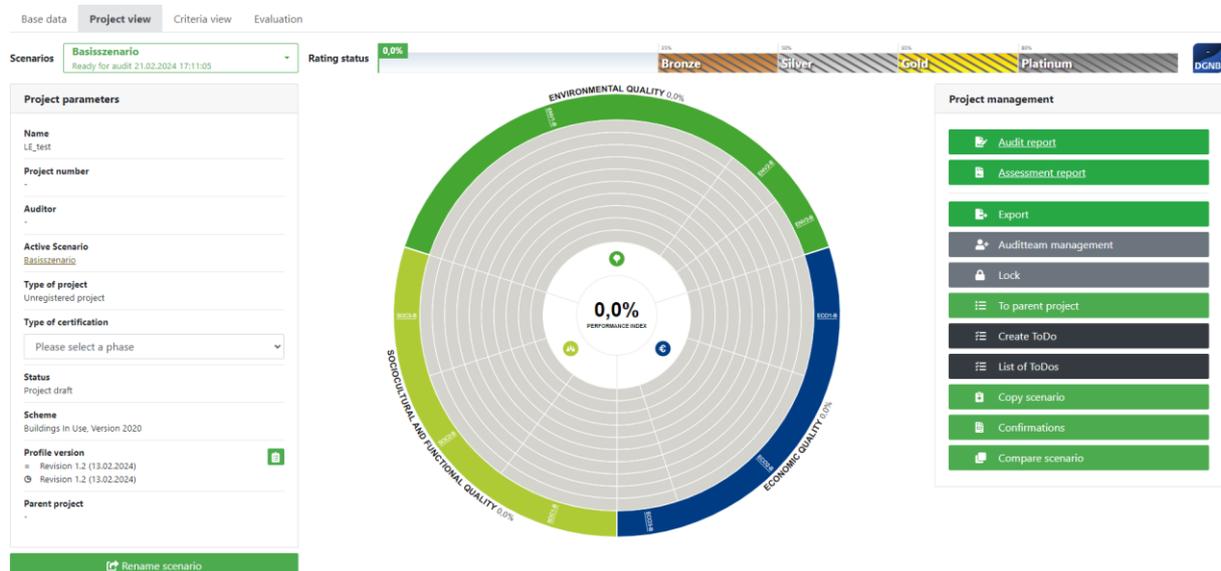
3.8 Managing projects

In the DGNB system software, project audit and administrative activities are carried out via the browser. Administrative activities include the team management, which can be selected via the 'Audit-team management' button in the 'project view' tab, under the 'Project management' column:



4. Project Main View

4.1 Project view



When you open a project, you will always be taken to the 'project view' tab. Here you can get a quick overview of your project, send the project to the DGNB for review (conformity assessment), download the project documentation or declaration of consent as a PDF for final assessment approval, export a to-do list for the resubmission and many more. More detailed descriptions of the individual buttons of the system software can be found in the upcoming chapters of this manual.

At the top of the project overview is the dynamic evaluation status bar which always synchronises the evaluation status of the project with the entered points. In addition, the award that can no longer be achieved by not fulfilling the secondary requirement is highlighted with a hatch in the evaluation status bar.



Scenarios **Basisszenario**
Ready for audit 02/15/2024 02:29:34 PM

Project parameters

Name
SM_test

Project number
-

Auditor
-

Active Scenario
[Basisszenario](#)

Type of project
Unregistered project

Type of certification
C

Status
Project draft

Scheme
Buildings In Use, Version 2020

Profile version
= Revision 1.2 (02/13/2024)
⊖ Revision 1.2 (02/13/2024)

Parent project
-

On the left-hand side of the project overview, you can see the project's basic data such as the scheme, the project name and its project number, the status of the project and the main auditor(s) in the project.



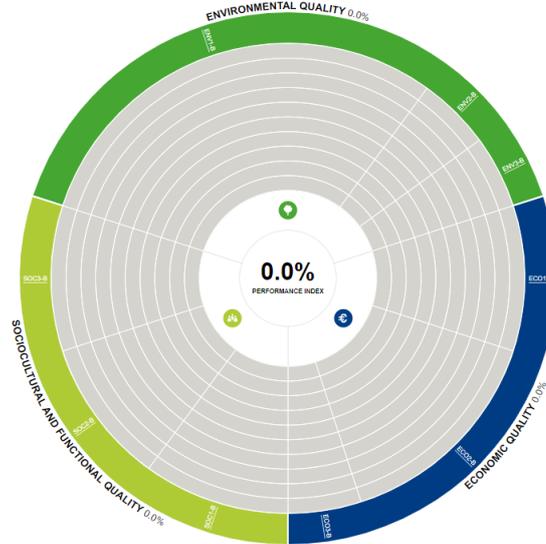
The project management is displayed on the right-hand side of the project overview. Here you have the option of downloading the audit report, locking the project and creating to-dos, among other things. A detailed description of the functions can be found later in the manual.



Project management

- [Audit report](#)
- [Assessment report](#)
- [Export](#)
- [Auditteam management](#)
- [Lock](#)
- [To parent project](#)
- [Create ToDo](#)
- [List of ToDos](#)
- [Copy scenario](#)
- [Confirmations](#)
- [Compare scenario](#)

In the centre is a pie chart or the DGNB 'flower', which provides a quick overview of the project's processing status. In the middle of the flower, you will find the overall performance level achieved by the project, which is continuously updated as changes are made.



4.2 Criteria view

The Criteria overview tab is located next to the Project overview tab. Here you will find a list of all the criteria of the selected scheme, information on the points achieved, maximum achievable points, limit values and the degree of fulfilment of the criterion. Click on the criteria name to open the corresponding criterion (same can be done by clicking the criterion name on the pie chart).

Base data Project view **Criteria view** Evaluation

Scenarios **Basisszenario** Ready for audit 02/1 Rating status **0.0%** **Bronze** **Silver** **Gold** **Platinum** **DGNB**

Criteria	IS CLP	MAX CLP	Limit value	Performance index
General Informations ↑				
GENERAL General Information	0.00	0.00	0.00	0.0%
Environmental Quality ↑				
ENV1-B Climate Action and Energy	0.00	140.00	0.00	0.0%
ENV2-B Water	0.00	110.00	0.00	0.0%
ENV3-B Materials and Recycling	0.00	110.00	0.00	0.0%
Economic Quality ↑				
ECO1-B Operational Costs	0.00	120.00	0.00	0.0%
ECO2-B Risk Management and Long-term Asset Value	0.00	100.00	0.00	0.0%
ECO3-B Procurement and Operations	0.00	105.00	0.00	0.0%

4.3 Evaluation

The screenshot shows the DGNB evaluation interface. At the top, there is a 'Scenarios' dropdown set to 'Basisszenario' and a 'Rating status' bar showing '0.0%' with Bronze, Silver, and Gold medals. The main content area is divided into three sections:

- Top Left (Red Box):** General information, name, and description of the criterion. It shows 'ENV1-B Climate Action and Energy' with a 'Ready for audit' date of 02/15/2024 02:00.
- Middle Left (Red Box):** Performance metrics. It displays a 'Performance index' of 0.0%, 'CLP estimation' of 0, 'Checklist points (CLP):' of 0.00 / 140.00, and 'Parameters:' of 0 / 14. It also shows 'CLP threshold:' and 'CLP minimum value:' both set to 0.
- Bottom Left (Red Box):** A list of indicators:
 1. Management: Plan
 2. Management: Do
 3. Management: Check
 4. Management: Act
 5. AGENDA 2030 BONUS - LCA
 6. Evaluation of performance
 7. AGENDA 2030 BONUS - Carbon neutrality

The right side of the interface contains the main evaluation criteria and options:

- NOTE:** Please use the following DGNB-Excel-Tool for Carbon Dioxide Balance to proceed the furnishing pr afterwards.
- DGNB-Excel-Tool for Carbon Dioxide Balance:**
 - [DGNB GIB20 ENV1-B Tool CO2-accounting V2.4 210127_protected.xlsx](#)
 - Manual DGNB-Excel-Tool:**
 - [DGNB GIB20 ENV1-B Tool CO2-accounting manual_eng 20210122.pdf](#)
- 1.1. Target agreement (target value)**
 - A target agreement for the annual CO2 emissions has been defined. The target agreement is based on a target value, which is (0)
 - defined by the Climate Action Roadmap according to the 'Framework for Carbon Neutral Buildings and Sites' or the building is operated carbon neutral (10)
 - buildings or a technically (12)
 - defined by the Climate Action Roadmap according to the 'Framework for Carbon Neutral Buildings and Sites' or the building is operated carbon neutral (14)
- 1.2. Level of ambition**
 - The long-term target value in the climate action roadmap is set according to
 - no ambition level (0)
 - ambition level 1 (6)
 - ambition level 2 (8)
 - ambition level 3 (10)
 - ambition level 4 (12)

When you click on individual criteria, you will have a view as shown above. At the top left, general information, name and description of the criterion are shown. At the bottom left, a list of indicators is displayed. In the middle box on the left-hand, the degree of fulfilment of the overall criterion, the points awarded for the overall criterion and a bar for displaying the parameters that have already been processed.

Clicking on one of the indicators opens the field for editing the parameter responses.

5. Editing the project

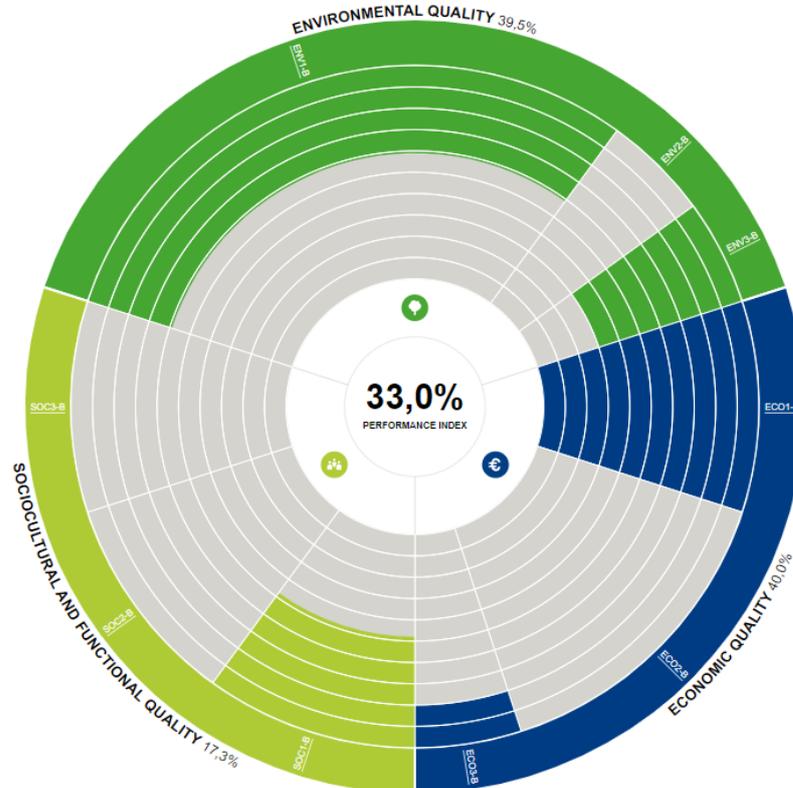
5.1 General information

Criteria should always be completed/processed before they are submitted for conformity check. In some designated indicators, it is mandatory to complete all parameter answers so that the checklist points can be calculated. If no answer is given for a parameter, it is automatically given a score of 0 points.

5.2 Opening a criterion

As already described, you can open the criteria via the 'criteria view' tab. In addition to this variant, there are two other ways in which criteria can be opened:

1. It's possible to click on the name of the criterion in the 'project view' tab. The criteria that are included in the overall evaluation are shown in the pie chart. The criteria acronym (ECO, ENV, SITE, PRO, TEC, SOC) is shown at the outer circle of the diagram (DGNB flower) and clicking on it opens the criterion. Criteria that are not included in the overall evaluation or higher-level criteria can be found in the 'criteria view' or in the sidebar under the evaluation tab.



2. The criterion can be opened by clicking on arrow icon in the 'Evaluation' tab. Please see image below. The following bar will then open, in which you can navigate between the criteria.

5.3 Editing Criteria

5.3.1 Types of questions

- The first question type provides you with the answers as multiple choice, you only have to click on the answer that suits you. It is not possible to give more than one answer.

1.1. Target agreement (target value)

A target agreement for the annual CO2 emissions has been defined. The target agreement is based on a target value, which is

- the requirements were not fulfilled (0)
- determined internally (10)
- based on data from several comparable buildings or a technically innovative building (12)
- defined by the Climate Action Roadmap according to the 'Framework for Carbon Neutral Buildings and Sites' or the building is operated carbon neutral (14)

- For the second type of question, you have to enter a numerical value.

Areas

Gross Floor Area in m²

5.3.2 Errors while entering value

Please only enter a numeric value. The following errors can occur when entering numerical parameter responses:

This could be the cause of the error:

- A **letter** was used instead of a **number**

?  Gross Floor Area in m²

Please enter a numeric value.

- A **comma** was used **instead of a point** for decimal numbers

?  Gross Floor Area in m²

Please enter a numeric value.

- A special character that is not permitted has been used

?  Gross Floor Area in m²

Please enter a numeric value.

- A space was used in the parameter response

?  Gross Floor Area in m²

Please enter a numeric value.

If too many decimal places were entered, an error message will indicate how many decimal places are permitted:

?  Gross Floor Area in m²

Maximum number of decimal places: 2

If the value entered is greater than the parameter allows, the error message will indicate the maximum permissible value.

INNOVATION AREA (1. - 4.)

- ?  Explanation: If alternative measures are implemented, which will increase the user comfort, these can be evaluated positively in accordance with the objective of the criterion and evaluation of other indicators. (max. 100 points)
(If the innovation area is not used please enter 0 points!)

Max:100

5.3.3 Calculation tools (Excel)

In some indicators, excel tools for calculations are available for download. You can download these tools by clicking on the link as shown below.

Base data | Project view | Criteria view | **Evaluation**

Scenarios: **Basisszenario** (Ready for audit 02/16/2024 12:*)

Rating status: **0.0%** (35% Bronze, 50% Silver, 65% Gold)

ENV1-B
Climate Action and Energy

Performance index: **0.0%**

NOTE: Please use the following DGNB-Excel-Tool for Carbon Dioxide Balance to proceed the furnishing proof afterwards.

DGNB-Excel-Tool for Carbon Dioxide Balance

- [DGNB_GIB20_ENV1-B_Tool_CO2-accounting_V2.4_210127_protected.xlsx](#)
- Manual DGNB-Excel-Tool**
- [DGNB_GIB20_ENV1-B_Tool_CO2-accounting_manual_eng_20210122.pdf](#)

1.1. Target agreement (target value)

Click on the name of the tool (in green) and download the excel file. When the task with the excel file is completed, you should copy the results (points) from the excel into the numerical field of the software. Please also upload the completed excel tool (important!) in the verification area that you can access using the arrow button at the bottom of the page. Please see image below.

Indicators

- 1. Management: Plan
- 2. Management: Do
- 3. Management: Check
- 4. Management: Act
- 5. AGENDA 2030 BONUS - LCA
- 6. Evaluation of performance
- 7. AGENDA 2030 BONUS - Carbon neutrality

1. long-term target value in the climate action roadmap is set according to

- no ambition level (0)
- ambition level 1 (6)
- ambition level 2 (8)
- ambition level 3 (10)
- ambition level 4 (12)

Please upload proof documents for indicator 1 "Management: Plan" here

Please upload proof documents for indicator 2 "Management: Do" here

Please upload proof documents for indicator 3 "Management: Check" here

Please upload proof documents for indicator 4 "Management: Act" here

Please upload proof documents for indicator 5 "AGENDA 2030 BONUS - LCA" here

Please upload proof documents for indicator 6 "Evaluation of performance" here

Click on arrow at the bottom of the page to access the Verification area

5.3.4 Checklist points (CLP) achieved in criterion

Within the criteria, you will find a section on the left-hand side that shows you the points achieved for a criterion.

Performance index: **24.0%**

CLP estimation: **0**

Checklist points (CLP): **24.00 / 140.00**

Parameters: **2 / 14**

CLP threshold: **0**

CLP minimum value: **0**

Checklist points CLP: Shows the points within a criterion. Due to interdependencies between the answers, it is often not possible to calculate these points individually from the formula, **i.e. no points can be displayed in some criteria if not all questions in the criterion have been answered.**

CLP-threshold value: The minimum points shown here must be achieved in the criterion for the criterion to be included in the overall assessment. If the points are not achieved, the criterion is rated 0%.

CLP-minimum value: The minimum points shown here must be achieved in the criterion for the overall project to be certified. Criteria that have a minimum value are so-called 'K.O.-criteria'.

5.3.5 Writing to-do-notes and the to-do-list

You can write a to-do in each criterion for the criterion itself, for the indicators and for the parameters. There are two ways to write to-dos:

- 1) Via the 'project management' in the 'project view': Simply click on "Create to-do" here



- 2) Alternatively, directly at the parameter: Simply click on the  symbol and a new window opens in which the to-do can be written.

Overview Attachments Message ×

Project: [SM_test](#)

Criterion: [SOC3-B](#)

Indicator: [1. Pedestrians](#)

Parameter: [Storage facilities for mobility aids \(e.g. walkers, pushchairs, electric scooters, etc.\) are available.](#)

Assigned by:

Assigned to:

ToDo type:

Subject:

Date of creation: 02/16/2024

Description:

- **Assigned by:** This cannot be changed and displays the user i.e. log-in data / account used to log in to the software.
- **Assigned to:** This is where you specify who the comment is addressed to. If the comment is assigned to the 'DGNB Assessor team', it will be processed by our assessor after the project has been submitted. However, you can also assign the comment to one of your employees or team by selecting 'Audit team'.

Assigned to:

ToDo type:

- **As a general rule, a to-do can only be seen and edited by the person or group to whom it is assigned.** If more than one person should be able to see the to-do, the relevant persons must be added to the audit team. All persons in this team then have access to the to-do.
- **To-do type:** Here you specify whether it is a comment or a plan change. In practice, comments are usually used, but of course this is individual.
- **Subject:** This is a mandatory field and must be filled in, otherwise the comment cannot be saved. Ideally, use a subject that summarizes the topic briefly and clearly.
This field cannot be edited by assessor if the to-do was assigned by an auditor!
- **Creation date:** This cannot be changed and the date at the time the comment was created is always entered.
- **Description:** A description of the question, problem or comment should be entered here. This is also a mandatory field and must be filled in.
This field cannot be edited by assessor if the to-do was assigned by an auditor!

To upload documents in the comment or add additional notes, it must first be created as described above. Once the to-do has been created, you can add it by clicking on the symbol . This symbol only appears when a comment has been written.

You can have multiple comments to the same indicator by clicking on the  symbol. To view all comments, you have to click on the  symbol and it will show you all the comments for that indicator.

List of Todos ✕

Status: Assigned to: Assigned by: Closed: Export

Management	Group of criteria ↕	Criterium ↕	Indicator ↕	Parameter ↕	Subject ↕	Status ↕	Assigned to
Delete	Sociocultural and Functional Quality	SOC3-B	1. Pedestrians	Storage facilities for mobility aids (e. ...	Pedestrian	open	Audit team
Delete	Sociocultural and Functional Quality	SOC3-B	1. Pedestrians	Storage facilities for mobility aids (e. ...	pedrestrian 2	open	Audit team

Close

You can view all the 'open' as well as 'closed' comments by ticking the closed box in the List of to-dos. Please see image below.

List of Todos

Status: Assigned to: Assigned by: Closed:  

Management	Group of criteria	Criterion	Indicator	Parameter	Subject	Status	Assign
	Sociocultural and Functional Quality	SOC3-B	1. Pedestrians	Storage facilities for mobility aids (e. ...	Pedestrian	offen	Audit
	Sociocultural and Functional Quality	SOC3-B	1. Pedestrians	Storage facilities for mobility aids (e. ...	pedestrian area	geschlossen	Audit
	Sociocultural and Functional Quality	SOC3-B	1. Pedestrians	Storage facilities for mobility aids (e. ...	pedrestrian 2	geschlossen	Audit

Close

After you save the to-do, an additional tab called 'to-do status' will appear.

ToDo status:

Additionally, new tabs like 'Documentation', 'Attachments' and 'Message' will appear. Please see image below.

Overview Documentation Attachments Message

Project: [Sm_test](#)

Criterion: [ENV-1-B](#)

Indicator: [1. Management: Plan](#)

Parameter: [A target agreement for the annual CO2 emissions has been defined. The target agreement is based on a target value, which is](#)

Assigned by:

Assigned to:

ToDo type:

Subject:

Date of creation: 02/16/2024

Description:

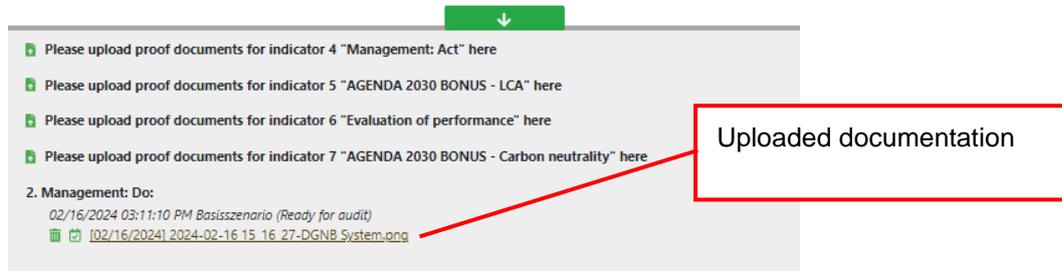
ToDo status:

Save Cancel

Files can be uploaded in the comment in the 'Attachments' tab. These attachment documents are then only located in the to-do itself and will not be found in any of the verification areas in the software.

Once the to-do has been completed and 'Save' button has been clicked, the option to upload 'Documentation' appears in addition to 'Attachments'.

The difference between 'Attachment' and 'Documentation' is that the documentation appears in the verification area at the bottom of that page for the specific indicator that it was uploaded for. Please see image below.



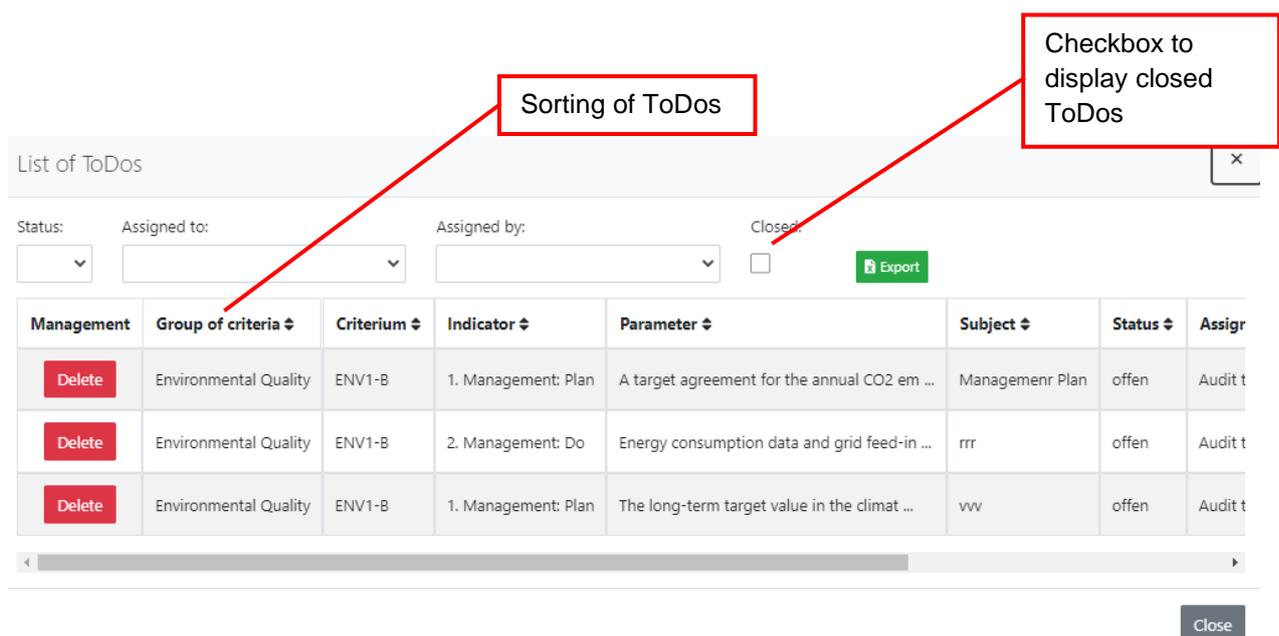
In the 'Messages' tab, you can write further notes on the comment. Simply enter your text in the right-hand text field and then click on 'Send message' - the saved text will be transferred to the text field above. Please note that once notes have been written, they can no longer be edited. In this tab, you can also reply to comments that examiners have assigned to you or the examiners can enter their answers to any questions asked. Messages can be viewed by all users who can see the to-do.

There are the following statuses in the status list for tasks:

- **Open:** The to-do is being processed by the auditor. Assessors do not use this status, except when assigning a comment to the auditor.
- **Done:** The to-do has been completed by the auditor.
- **Completed:** The to-do has been fully processed and completed by both the auditor and the assessor, i.e. nothing more needs to be done on this to-do.

The to-dos written in a project can be viewed via the to-do list. To open the to-do list, click in the

'project view' tab and under Project management, click on new window opens.



All to-dos that have been written in the project are listed in this window. Only the main auditor sees all to-dos with the status open and completed; other people may not see all to-dos, e.g. if the to-do is not addressed to them.

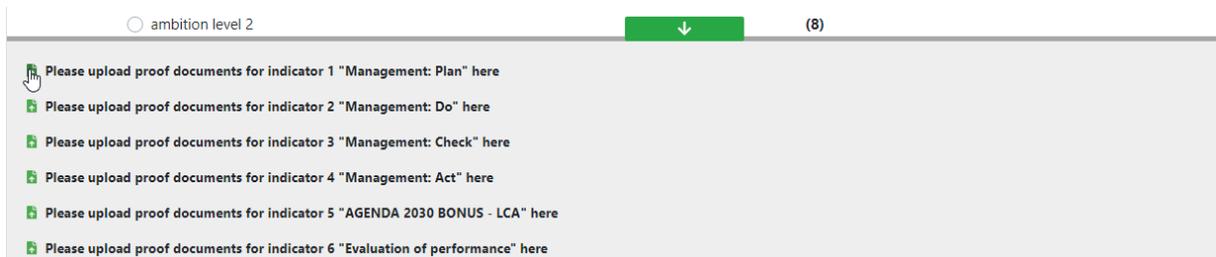
There are several filter settings for to-dos at the top. You can set the filters as you wish. The 'Closed' checkbox can be clicked and to-dos with the status 'closed' are then displayed. These to-dos have been completely processed and checked by both the auditor and the assessor and are generally no longer required for the further course of the project. However, they can still be called up for documentation purposes.

Furthermore, the to-dos can be sorted according to their categories, e.g. criteria group, indicator, subject, status, etc., by using the  symbol.

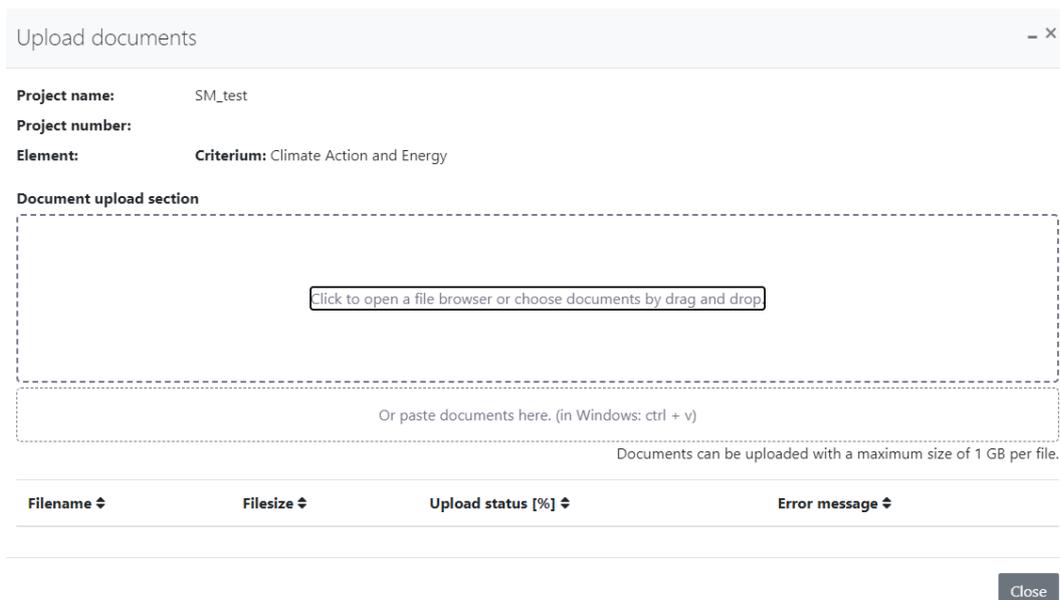
To-dos can be opened by double-clicking.

5.3.6 Upload verification documents

At the bottom of each criterion there is an area for uploading verification documents.



To upload a proof, click on the symbol  for the relevant indicator and the following pop-up will open:



You can simply 'drag and drop' one or more files into the 'Document upload section' field, which will then be uploaded to the software. If you click with the mouse in the 'Document upload section' field,

the typical dialog appears in which you can select a single file to upload.

Filename ^	Filesize ⇅	Upload status [%] ⇅	Error message ⇅
trial upload.png	25,63 KB	Done	

You can recognize a successful upload by the upload status 'Done'.



To ensure that the uploaded files are also displayed in the software, click on the icon  or reload your browser.

5.3.7 Help with criteria processing

There are  buttons below the criteria name. If you click on them, the corresponding criterion will be downloaded on your machine.

5.3.8 Reference-symbols, assessment-symbols and status-check-marks

There are various symbols to the left of individual questions, which are explained below.

 indicates whether a question has been answered.

These are check symbols and can only be set by the assessor:

 = not yet checked

 = answer has been checked and accepted

 = answer has been checked, but evidence is missing or insufficient

 This is the reference symbol. A referenced parameter is required in several criteria (or in several places in one criterion). To avoid having to enter the answer several times (e.g. same usable area again and again for different criteria), the parameter is referenced, i.e. you enter the answer once and this answer is displayed for all referenced parameters. To see where the parameter was referenced,

click on it. A window opens with a list where the parameter still appears. If you click on one of the list entries, you are immediately forwarded to the corresponding referenced parameter.

5.4 Pre-Assessment functions

The criteria estimation can be (de)activated within a project and at criteria level. This means that you do not have to answer the entire list of questions, but instead enter the estimated value of the CLPs to be achieved. This is only possible in the 'Project draft' and 'In application' status. In the following screenshot, the criteria estimate is marked in red.

The screenshot shows the 'Evaluation' tab for a project named 'Basisszenario'. The 'Rating status' is 1.0%, and the progress bar shows Bronze, Silver, Gold, and Platinum levels. The 'Indoor Comfort' criteria (SOC1-B) is selected. A red box highlights the 'Performance index: 10.0%' and the 'De-activate CLP estimation' button. The 'Checklist points (CLP): 10.00 / 112.00' is also visible. The criteria details include target agreements for indoor comfort, user satisfaction, and complaint management.

If criteria estimation is activated, this can be seen from the red flags that are set in the criteria list and also in the flower.

The screenshot shows the 'Evaluation' tab for the same project. The 'Rating status' is 0.0%. A list of criteria is shown on the left, with a red box highlighting '(0,00/140,00) ENV1-B - Climate Action and Energy'. The 'Performance index: 0.0%' is displayed. The criteria details include a target agreement for annual CO2 emissions and a long-term target value in the climate action roadmap.

5.5 Audit-Teams

Auditors and, if applicable, supporters can manage the audit teams in the software. The audit team administration offers the option of allowing several users to work on a project simultaneously with specified authorization.

The screenshot displays the software interface for project management. On the left, the 'Project parameters' sidebar shows details for 'Basisszenario', including its name (SM_test), project number, auditor, and certification phase. The central area features a circular 'PERFORMANCE INDEX' chart with a current value of 17.7%. The chart is divided into four quadrants: ENVIRONMENTAL QUALITY (44.3%), ECONOMIC QUALITY (0.0%), SOCIO-CULTURAL AND FUNCTIONAL QUALITY (0.0%), and another 0.0% segment. On the right, the 'Project management' sidebar lists various actions such as 'Audit report', 'Assessment report', 'Export', and 'Auditteam management', which is highlighted with a red box. A modal window titled 'Administer auditteam' is open, showing fields for 'Main Auditor' and 'Add supporter', along with a 'Person' list and management icons.

The audit team administration offers the possibility to manage team members (supporters) and their authorizations. The only authorization that is activated from the start is the 'write' authorization. Supporters can use this to edit the project. If this is removed from the supporter, they can only view the project but cannot edit anything.

This screenshot shows the 'Administer auditteam' modal window with several callout boxes explaining the icons used for managing team members. The window includes fields for 'Project name' (Test 1234) and 'Main Auditor (determined by DGNB)' (Auditor SySo (test.syso-auditor@dgnb.de)). Below these are 'Add supporter' and 'Person' sections. A toolbar contains icons for edit, lock, unlock, add, and delete. The callout boxes are as follows:

- Adding new team members:** Points to the '+' icon.
- When using these buttons, the supporter is given the corresponding authorisation:** Points to the edit, lock, and unlock icons.
- The supporter receives rights to edit the project. This is the only authorisation that is always active by default:** Points to the edit icon.
- The supporter receives rights to submit the project:** Points to the lock icon.
- The supporter can lock/unlock projects, this includes the possibility to edit the project in locked state:** Points to the lock and unlock icons.
- Removal of members from the audit team:** Points to the delete icon.
- Gives supporters the ability to add or remove team members and manage their assignments:** Points to the add and delete icons.

5.6 Scenarios

You can use scenarios to create an alternative evaluation of the project, for example. A new scenario is also automatically created for the new phase when switching to other project phases (e.g. from review to subsequent submission).

In general, you can only submit one scenario at a time. Once a scenario has been submitted, all other scenarios are blocked for editing, i.e. they are displayed in a red font colour and you only have read-only access.

5.6.1 Scenario list and scenario selection

At the top left of each of the main windows (Project overview, Criteria view, Evaluation) you will find a drop-down list with all the scenarios that have been created in the project.

The screenshot displays the software interface for scenario management. At the top, there is a navigation bar with tabs for 'Base data', 'Project view' (which is active), 'Criteria view', and 'Evaluation'. Below this, a 'Szenarien' (Scenarios) dropdown menu is open, showing a list of scenarios. The selected scenario is 'Basisszenario' (highlighted in green), with a 'Bewertungsstatus' (Evaluation status) of 0%. The list includes:

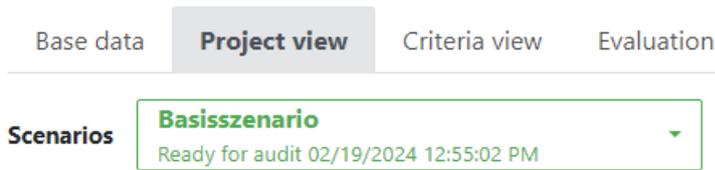
- Basisszenario_** (green text): Nachreichung 17.07.2023 13:59:51
- Basisszenario_;** (red text): Prüfung 23.06.2023 10:53:39
- Basisszenario_;** (red text): Bereit zum Bearbeiten 23.06.2023 10:48:11
- Basisszenario_;** (red text): Bereit zum Bearbeiten 21.01.2021 14:55:55

Below the dropdown, a 'Projekt' (Project) details panel is visible, showing:

- Project**: Basisszenario- trial 2 (highlighted in green)
- Name**: SM_test
- Project n**: -
- Auditor**: -

The 'Basisszenario- trial 2' scenario is also shown in a separate dropdown menu, with a 'Ready for audit' status and a timestamp of 02/19/2024 02:15:49 PM. This menu also lists other scenarios: 'Basisszenario- trial 1' (Ready for audit, 02/19/2024 02:15:33 PM) and 'Basisszenario' (Ready for audit, 02/19/2024 12:55:02 PM). Red trash icons are visible next to the trial scenarios, indicating they can be deleted.

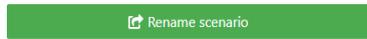
At the start of a project, there is always only one scenario - the 'base scenario'. You can either work with this scenario or create your own scenario. You can see which scenario is currently selected at the top right of the scenario list.



The colour with which the scenario names are displayed is related to its editability:

- If a scenario is written in **green**, then this scenario can be edited, and it is possible to send this scenario to the DGNB for review.
- If a scenario is in **red**, then this scenario cannot be edited. It is possible to open and view it, but changes are not possible. A red scenario cannot be sent to the DGNB for review either.

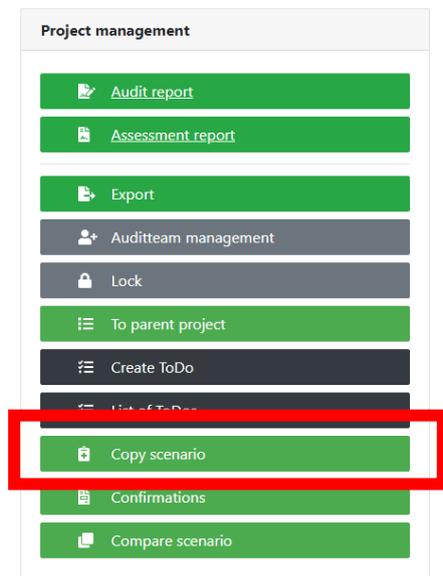
You can change the name of the scenario with the 'Rename scenario' button located at the bottom of 'Project view'.



A scenario can be deleted with the trash can symbol . This is only possible if a scenario has a green font colour and it is not the scenario currently in use. In practice, this means that most scenarios cannot be deleted; they are usually scenarios that you have created for test purposes.

5.6.2 Creating a scenario

If you want to create a new scenario, click on the 'Copy scenario' button on the right-hand side of the 'Project view' tab under the 'Project management' column, as shown in the image below. A new scenario is always a copy of the currently selected scenario.



An extra window opens in your browser in which you can select which properties of the active scenario you would like to copy. Enter the name of the scenario to be created, select the desired checkboxes, and click on 'Copy'. The newly created scenario should now appear in the scenario list.

The checkbox options are:

- **Copy documentation:** copies all the proof documents that were uploaded in the criteria to the new scenario (not the proof documents from the to-dos!)
- **Copy to-dos:** copies all to-dos, including the proof documents in the to-dos to the new scenario
- **Copy answers:** copies all given answers from the criteria
- **Copy assessment symbols:** copies all assessment symbols of the parameters checked by the assessor.

Copy Scenario ×

Project: SM_test

Scenario: Basisszenario

Scenario status: Ready for audit

Last modified: 02/19/2024 02:15:37 PM

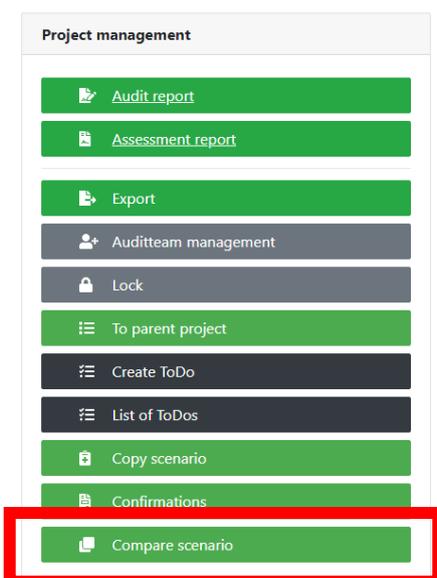
New name:

Options:

- Copy documentation
- Copy ToDos
- Copy answers
- Copy assessment symbols

5.6.3 Scenario comparison

The 'Compare scenario' button under 'Project management' provides a function for clearly comparing the different scenarios and gives a comparison of the degree of fulfilment.



The following window opens and you can select the scenario to be compared on the righthand side:

Select scenarios to be compared

Remove scenario

Add scenario

Scenario	Total fulfillment	Award
Basisszenario- trial 2	5.4 %	-
Basisszenario- trial 1	12.3 %	-
General Informations	0.0 %	0.0 %
GENERAL: General Information	0.0 %	0.0 %
Environmental Quality	13.5 %	30.8 %
ENV1-B: Climate Action and Energy	10.0 %	41.0 %
ENV2-B: Water	0.0 %	0.0 %
ENV3-B: Materials and Recycling	0.0 %	0.0 %
Economic Quality	0.0 %	0.0 %
ECO1-B: Operational Costs	0.0 %	0.0 %
ECO2-B: Risk Management and Long-term Asset Value	0.0 %	0.0 %
ECO3-B: Procurement and Operations	0.0 %	0.0 %

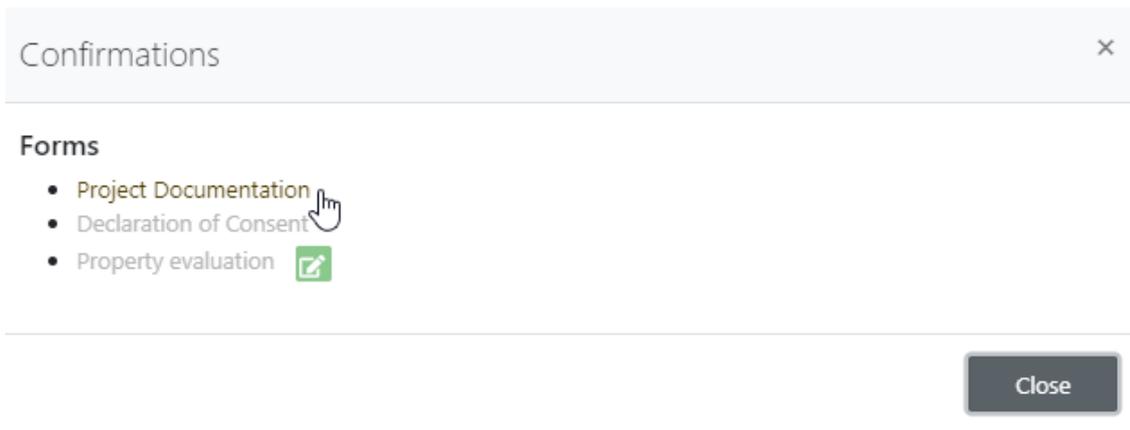
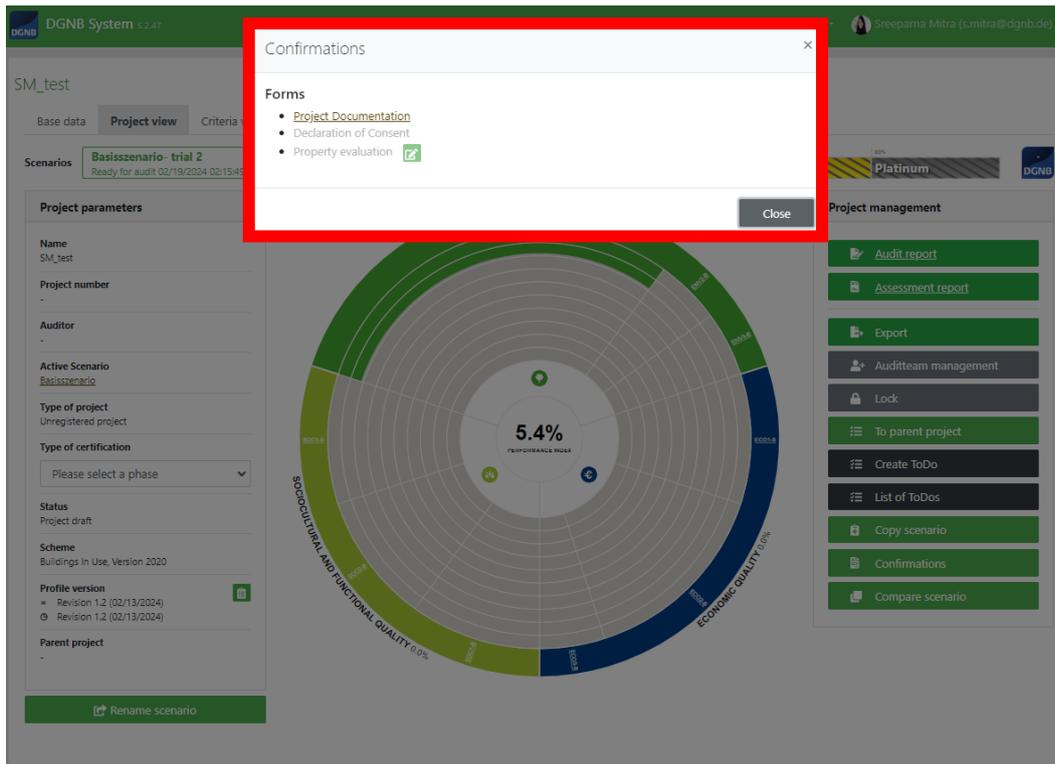
If the scenarios within a project have different degrees of fulfilment, this is highlighted in yellow. You can add and compare up to 7 scenarios using the '+' sign in the top right-hand area. The scenario selection can be made via the drop-down menu (marked in red). You can remove the scenario from the comparison using the 'x' sign above the scenario name.

5.6.4 Submitting the project

The project must be sent to the DGNB so that the audit can begin. Before you send the project to the DGNB for the first conformity check, the main auditor must generate project documentation and have it signed by himself and the client. To generate project documentation, click on 'Project documentation' under 'Confirmations' in the 'Project Management' and it will be downloaded automatically.

Project management

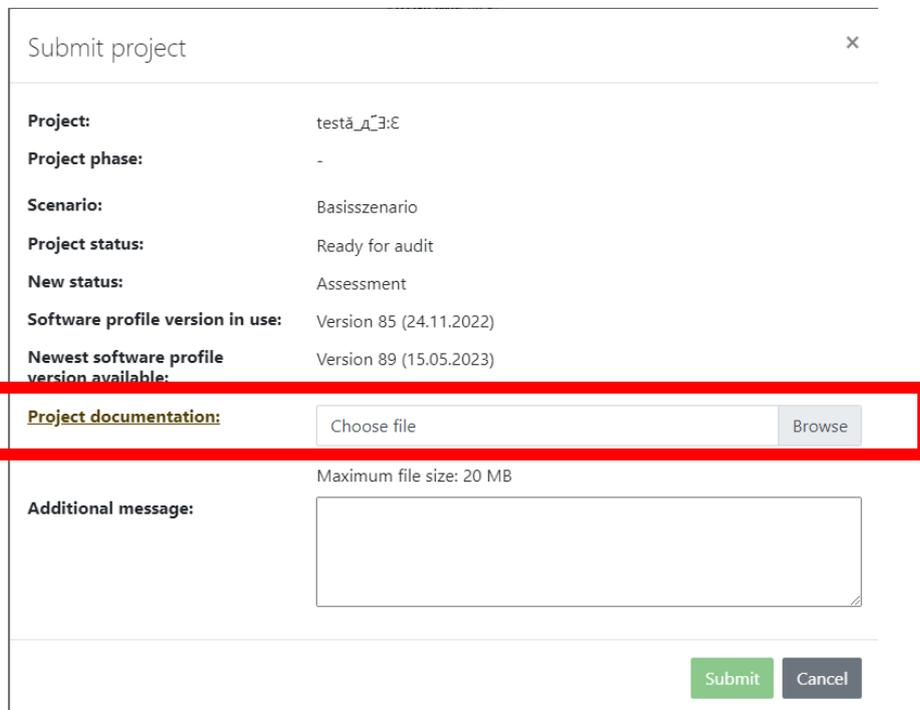
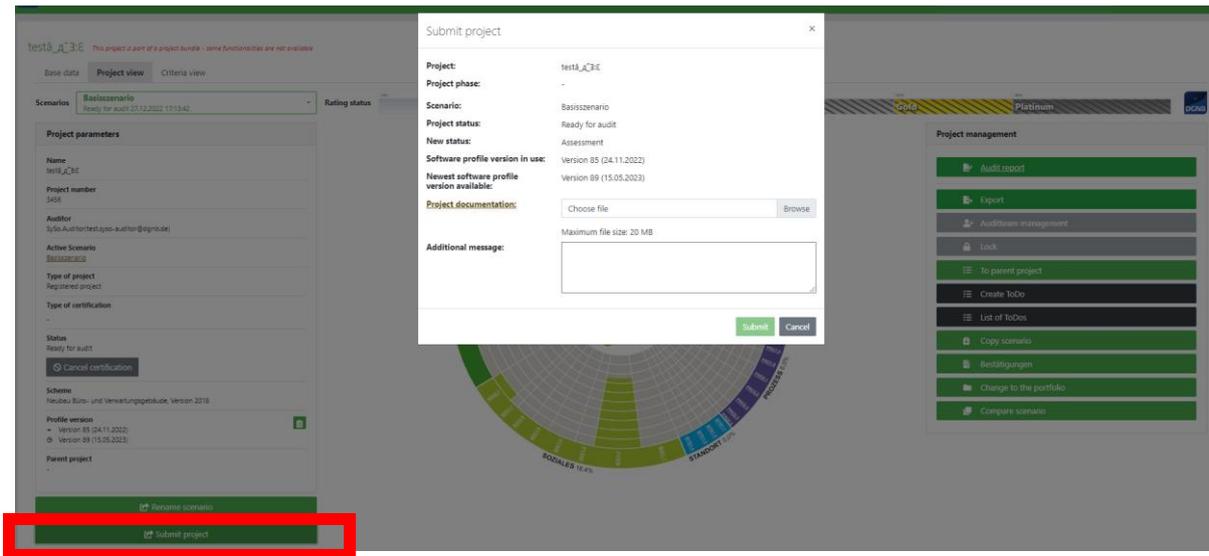
- Audit report
- Assessment report
- Export
- Auditteam management
- Lock
- To parent project
- Create ToDo
- List of ToDos
- Confirmations**
- Compare scenario



When you create the project documentation, please make sure that no further changes are made in the project evaluation. If there are any differences between the submitted project documentation and the digital version of the project, the project documentation will not be recognized and must be recreated and signed.

Also make sure that you generate the project documentation from the correct scenario. The documentation for the scenario selected in the top left-hand corner of the project view is always generated.

As soon as you have finished editing the project, click on 'Submit project' at the bottom left of the 'project view'. **Make sure that the correct scenario is selected.**



First, the audit report opens with error messages and warnings, which must first be edited or acknowledged so that the submission window opens.

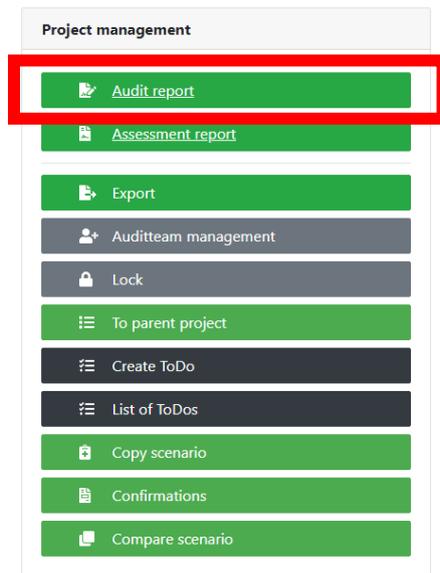
Furthermore, the signed project documentation of the current project status must be uploaded. This is marked in the above image with a red marking. This can also be downloaded by clicking on 'Project documentation' in the submission window.

You can send a message directly to the examiner by writing a message in the 'Additional message' text field. Finally, you must click on 'Submit' to submit the project for review.

As long as a project is under review, it is not possible to edit it.

5.6.5 Audit report (control report)

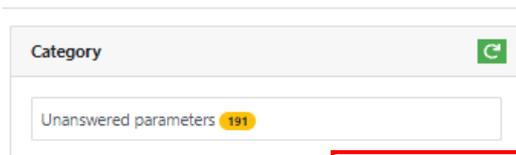
The audit report is primarily there to support you in project processing. You can find the audit report under 'Project view' in 'Project management'.



The content displayed here is intended to provide you with assistance where data may be missing. As some projects are very individual, you do not necessarily have to edit all warnings, but you should still check that nothing relevant to the audit is open. You only need to edit the error messages, otherwise the project cannot be checked.

If not all requirements are met upon submission, a new window opens automatically listing the 'errors'. This audit report (control report) must not contain any errors for a project to be submitted.

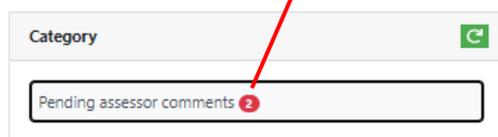
Audit report



Warnings can be acknowledged in order to submit the project despite warnings.

Errors

Audit report



Error messages must be processed in any case:

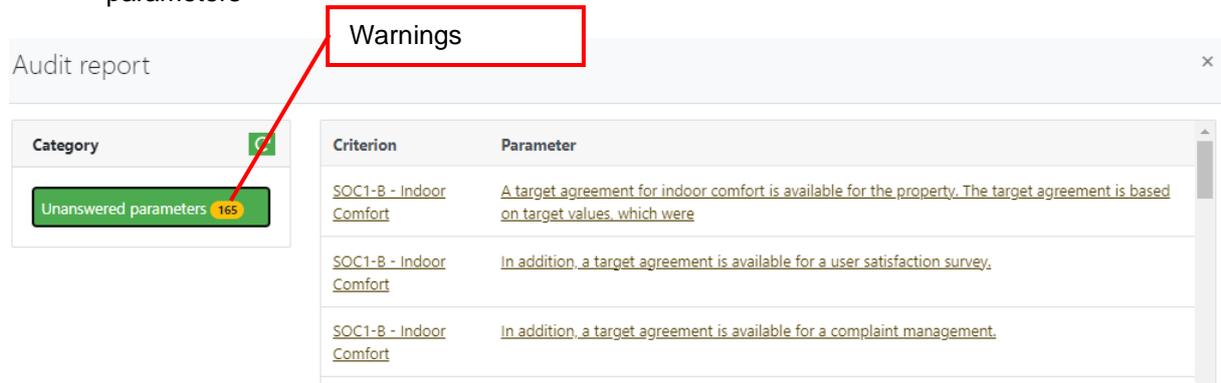
Flawless audit report:

All reports are without errors

Of course, you can also open this error report manually and check whether all requirements have been met before submitting. To do this, click on 'Audit report' in the 'Project view'.

There are 3 different warning categories in the 'Ready to audit' project status:

- **Unanswered parameters** – No technically correct answer was given for one or more parameters



Audit report

Warnings

Criterion	Parameter
SOC1-B - Indoor Comfort	A target agreement for indoor comfort is available for the property. The target agreement is based on target values, which were
SOC1-B - Indoor Comfort	In addition, a target agreement is available for a user satisfaction survey.
SOC1-B - Indoor Comfort	In addition, a target agreement is available for a complaint management.

- **Area for documents of proof** – without documents of proof
- **Not fulfilled secondary requirement** - One of the main criteria does not meet the minimum degree of fulfilment required to validate the rating achieved by the overall degree of fulfilment.

And two possible error categories:

- **Minimum requirements not met** – One of the minimum requirements has not been met, i.e. the project is not certifiable.
- **Parameters that need to be answered** - Some parameters must be filled for the project to be certifiable. In this case, a technically correct answer is missing for one or more of these parameters

If you click on an entry in the error report, the main window of the software switches to the corresponding criterion, the question in the criterion or the to-do. An error in this report does not automatically disappear when it is corrected. To see which entries have already disappeared, either

click on  or close and open the error report.

When the project has been submitted and you receive it back from DGNB assessor, there are following possible warning categories:

- **Unanswered parameters**– No technically correct answer was given for one or more parameters
- **Area for documents of proof** – without documents of proof
- **Not fulfilled secondary requirement** - One of the main criteria does not meet the minimum degree of fulfilment required to validate the rating achieved by the overall degree of fulfilment. By opening the error message, you will receive information about which criteria group is involved and further details

And three possible error categories:

- **Minimum requirements not met** – One of the minimum requirements has not been met, i.e. the project is not certifiable.
- **Parameters that need to be answered** - Some parameters must be filled for the project to be certifiable. In this case, a technically correct answer is missing for one or more of these parameters
- **Unprocessed assessor to-dos** – One or more assessor comments have the status 'open'.

5.7 Edit subsequent submission

After the assessors have checked your submitted project, it will be sent back to you and released for you to work on again. You will receive an e-mail as soon as you can continue working on the project.

To see where the assessors require a correction, it is best to open the to-do list by clicking on

List of ToDos

in the 'Project view' in 'Project management' on the right. A new window opens in which all to-dos are listed according to criteria. Double-click on a list entry to open the to-do.

Alternatively, to-dos and comments can be opened directly in the respective indicator or criterion.

List of ToDos ×

Status: Assigned to: Assigned by: Closed: Export

Management	Group of criteria	Criterion	Indicator	Parameter	Subject	Status	Assigned to	Assigned by	Added at
Delete	Sociocultural and Functional Quality	SOC3-B	1. Pedestrians	Storage facilities for mobility aids (e. ...	Pedestrian	offen	Audit team	Sreeparna Mitra(s.mitra@dgnb.de)	02/16/2024
Delete	Sociocultural and Functional Quality	SOC3-B	1. Pedestrians	Storage facilities for mobility aids (e. ...	Pedestrian 3	offen	Audit team	Sreeparna Mitra(s.mitra@dgnb.de)	02/16/2024

Close

As a rule, further supporting documents or explanations are requested in the to-dos. If documents are required, upload them directly in the to-do (in the 'Evidence' tab), explanations can also be entered in the 'Messages' tab. Once you have finished working on a to-do, set the status to 'finished', which tells the assessors that you have checked this point.

Once you have processed all to-dos, the project is sent back to the assessors. To do this, click on 'Submit project' at the bottom left of the 'Project view'. Make sure that the to-dos you have edited have the status 'finished'. The audit report may appear again as described, which must be processed again.

IMPORTANT: If you receive a to-do from an assessor, i.e. a DGNB conformity checker is listed under 'Assigned by', do not change the 'Assigned to' field. In this case, if you have assigned the to-do to the DGNB assessor group, you may no longer have access to the to-do as the software recognizes it as an internal assessor comment. Should this happen, please contact software@dgnb.de and we will reset the assignment.

5.7.1 Download to-do-list

You can download the to-do list from two different places, depending on where you download the to-dos, the content of the file changes.

In the note list itself, there is an export button that only outputs the to-dos that are visible in the to-do list. Any filters that have been set are taken into account. Furthermore, only the basic information of the to-dos is output, uploaded files and other notes are missing.

List of ToDos ×

Status: Assigned to: Assigned by: Closed: Export

Management	Group of criteria	Criterion	Indicator	Parameter	Subject	Status	Assigned to	Assigned by	Added at
Delete	Sociocultural and Functional Quality	SOC3-B	1. Pedestrians	Storage facilities for mobility aids (e. ...	Pedestrian	offen	Audit team	Sreeparna Mitra(s.mitra@dgnb.de)	02/16/2024
Delete	Sociocultural and Functional Quality	SOC3-B	1. Pedestrians	Storage facilities for mobility aids (e. ...	Pedestrian 3	offen	Audit team	Sreeparna Mitra(s.mitra@dgnb.de)	02/16/2024

Close

To download all to-dos with more detailed information (uploaded files, additional notes), click on.

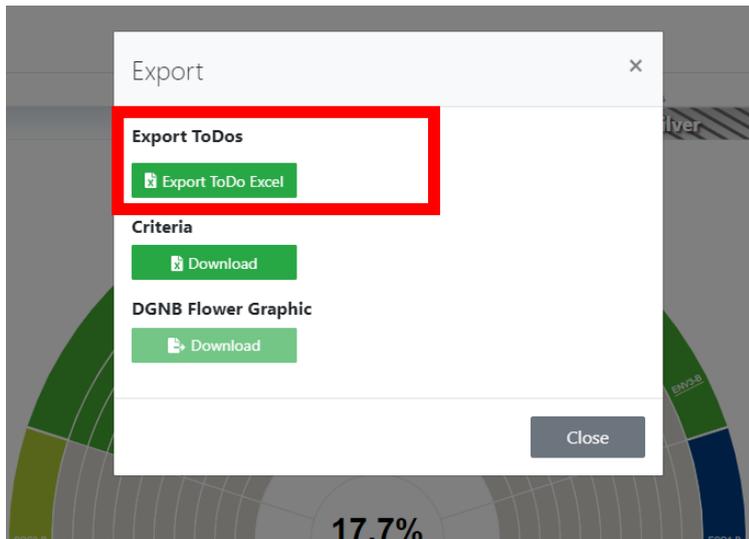


in the 'Project view' in 'Project management' and then on

Export ToDos



Please note that only the main auditor has access to all to-dos. If another person exports the to-dos, it is possible that not all to-dos are in the output, e.g. if an auditor has explicitly assigned a to-do only to the main auditor, this to-do is only exported if the main auditor performs the download.

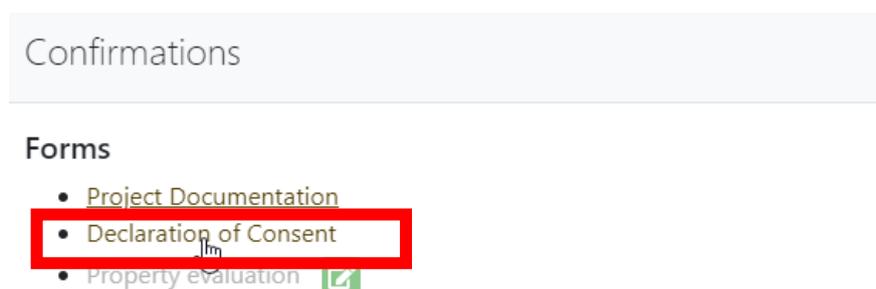


6. Audit results

6.1 Confirm audit

Once a project has been fully checked, it is returned to you with the status 'Check completed'. At this point, there is nothing more to do in the project itself. Your last task is to generate the declaration of consent for the audit result and upload it signed to the project. The declaration of consent must be signed by the main auditor and the client/applicant. Again, make sure that you generate the declaration of consent from the correct scenario.

To generate the declaration of consent, click on the 'confirmations' button on the right in the 'Project view' . In the window that opens, you can download the declaration of consent by clicking on 'Declaration of consent'; this may take several minutes.



Alternatively, the declaration of consent can also be downloaded in the project submission dialog box by clicking on "Declaration of consent".

The signed declaration of consent will be uploaded as part of the final project submission. Click on "Submit project" at the bottom left of the project overview. A dialog box opens and there is now an additional field in which the declaration of consent can be uploaded.

Submit project

Project: testä_d_3:ε

Project phase: -

Scenario: Basisszenario

Project status: Ready for audit

New status: Assessment

Software profile version in use: Version 85 (24.11.2022)

Newest software profile version available: Version 89 (15.05.2023)

Project documentation: Choose file Browse

Maximum file size: 20 MB

Additional message:

Submit Cancel

If this upload field remains empty, the project cannot be submitted. Once the declaration of consent has been uploaded, click 'Submit'.

The project has now been fully inspected and the inspection result has been confirmed. The DGNB will now issue the certificate and have the certification plaque produced.

6.2 Reject audit results

As an alternative to confirming the test result, the test result can also be rejected.

To do this, you do not need to upload a declaration of consent in the process described above, but select the 'Reject test result' button instead of 'Submit'.

Prüfergebnis ablehnen

Sind Sie sicher, dass Sie das Prüfergebnis ablehnen möchten?

Für eine erneute Prüfung ist eine kostenpflichtige Beauftragung nötig!

Ja, Prüfergebnis ablehnen

Bestätigen Abbrechen

IMPORTANT: If the project is to be inspected again after the inspection result has been rejected, it will be necessary to commission the DGNB for a fee in order to continue the corresponding process.

7.Synchronize project

The project is usually updated automatically and new answers are integrated directly into the calculation of the fulfilment levels. However, if evidence has been uploaded or to-dos have been edited, it may be necessary to use the  button to make the changes visible.

If you are unsure whether a change has been applied correctly, reloading the website will help to synchronize changes.

8.Project copy

Projects can be copied in any project status. Projects can be searched for and found via the project list and then copied using the "Copy" button (marked in red).

List of projects

Sm_test All project statuses

Name	Project number	Proposal number	Status	
SM_test			Project draft	  
Sm_test			Project draft	  
SM_test			Project draft	  

The following screen appears after clicking on 'Copy' and you can make the desired selection:

Copy project

New project name: SM_test_copy_02/19/2024 04:29:54 PM

Scheme: Buildings In Use, Version 2020

Project owner: Mitra, Sreeparna

Options

Copy ToDos and proofs

Assessor comments with base certificate

Assessor comments without base certificate

Note: Copying the proofs may take a moment.

Copy audit

Answers without assessor symbols

Answers and assessor symbols

Scenario to copy: Basisszenario

Status of copied scenario: Ready for audit

New project status: Project draft

Additional message:

The copied project then has the status 'Project draft' and can be registered if desired

9.Version

The purpose of the 'version' function is to make it easier to import corrections in the usage profiles and to improve data security. For auditors, this results in some changes and new functionalities when processing projects.

9.1 Introductory explanations

9.1.1 Difference: Usage profile version – software profile version

- The utilization profile version (e.g. new office and administration building 2015) is the known utilization profile. This is the basis for the questionnaire and the calculation logic as they are transferred to the software. Within a utilization profile version, there are no adjustments that change the assessment, but only supplementary definitions and/or spelling and grammar corrections. A new version of the usage profile is developed if there are adjustments that change the assessment.
- The software profile version is the version of the utilization profile as implemented in the software. If the checklist items have changed after an upgrade, this is only because the calculation in the software did not match the utilization profile.

9.1.2 Which consequences can a software profile upgrade have?

- Corrections to texts, e.g. spelling and grammatical errors
- Supplementary definitions that do not change the valuation.
- Corrections to the calculations of the checklist points if they do not calculate as described in the criterion.

9.1.3 Which projects are affected by software profile corrections?

When a project is created, it runs on the current software utilization profile version at that moment. Updates to the software utilization profile version are never automatically applied to a software project; an update must always be carried out explicitly by the main auditor.

The screenshot shows a software interface with the following elements:

- Nutzungsprofil:** Neubau Büro- und Verwaltungsgebäude, Version 2015
- Profilversion:** A list of versions with a dropdown arrow. The current version is Version 49 (21.09.2021). A newer version, Version 50 (08.12.2021), is highlighted with a red box and a callout that says "There is a newer software usage".
- Oberprojekt:** ASC_Test_170721
- Buttons:** Three green buttons are visible: "Version aktualisieren" (highlighted with a red box and a callout "Update of the software usage profile version"), "Szenario umbenennen", and "Projekt abschicken".

In principle, the software profile version used in the project has no influence on the testing of a project.

9.1.4 How can you tell which version is being used and which is the latest?

The latest software profile version used is displayed on the left-hand side of the project overview. The date in brackets shows when the version was released.

Base data **Project view** Criteria view

Scenarios **Basisszenario** Ready for audit 02/16/2024 12:11:57 Ra

Project parameters

Name
SM_test

Project number
-

Auditor
-

Active Scenario
[Basisszenario](#)

Type of project
Unregistered project

Type of certification
Please select a phase

Status
Project draft

Scheme
Buildings In Use, Version 2020

Profile version
= Revision 1.2 (02/13/2024)

⊖ Revision 1.2 (02/13/2024)

Parent project
-

Rename scenario

The version currently used in the project

The latest available version

9.2 Where can I see what has been changed?

If there has been a software profile upgrade, a change log window opens when the project is opened, in which all changes to the previous version are listed. In this window there is also a link to an overview of all changes that have been made to a usage profile.

New profile version is available

Version 63 (21.09.2021)

- ENV1.1: aktualisiertes LCA-Formblatt (Excel) hochgeladen
 - aktuelle Kriterienbeschreibungen als PDFs hochgeladen
 - diverse Textanpassungen und Ergänzungen in diversen Kriterien
- ECO1.1: aktualisiertes LCC-Excel-Tool in der Software hochgeladen
- TEC1.6: aktualisiertes TEC1.6-Excel-Tool in der Software hochgeladen
- ENV2.2: aktualisiertes ENV2.2-Excel-Tool in der Software hochgeladen

Es gab allgemeine Änderungen im Hintergrund, diese haben keine Auswirkungen auf die Bearbeitungsstand oder die Ergebnisse der Projekte

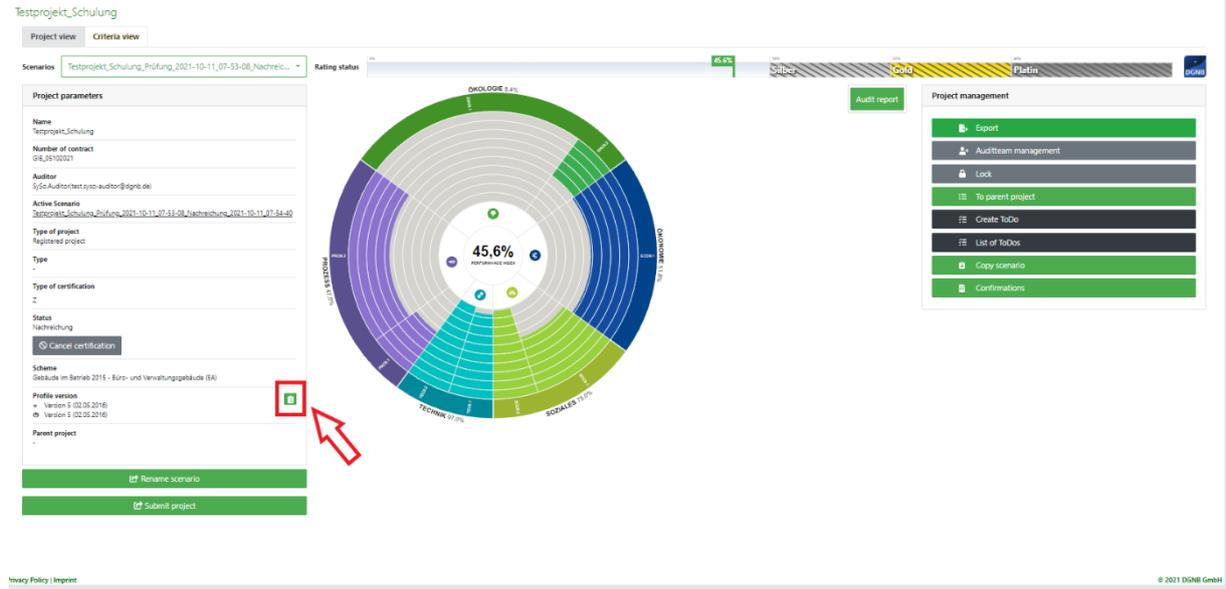
ENV2.2: aktualisiertes Excel-Tool hochgeladen

[View changelog](#)

If there is a newer software profile version than is used in the project, a window with changes opens when the project is opened. Only the changes to the previous version are listed here

For an overview of all changes in all versions, click on 'View changelog'. This opens an overview of all changes to the user profile

As the window only appears once with a new profile version, there is an  button in the 'project view' which opens the browser and documents all corrections/changes to the user profile.



The screenshot displays the 'Testprojekt_Schulung' project view. On the left, the 'Project parameters' section includes details like Name, Number of contract, Auditor, and Active Scenario. The central radar chart shows a 45.6% completion rate across various categories: ENVELOPE (6.4%), ENERGY (10.0%), TECHNICAL (37.0%), SOCIAL (11.0%), and ECONOMIC (35.6%). On the right, the 'Project management' section offers actions such as Export, Audit report, Auditteam management, Lock, To parent project, Create ToDo, List of ToDos, Copy scenario, and Confirmations. A red box highlights a document icon in the 'Profile version' section, with a red arrow pointing to it.

Regardless of the client, you can also view and export all change logs for all usage profiles at any time via the web interface.

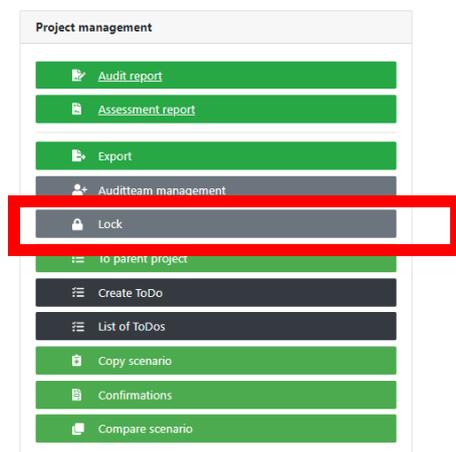
Softwareprofileversion

 Buildings In Use, Version 2020

Version	Public
Revision 1.2 (02/13/2024)	PDF Data: "Evaluation and structure of the DGNB System - Building in Use" was uploaded
Revision 1.1 (10/04/2023)	Upload ESG-Verification for the EU-Taxonomy.
Version 1 (18.11.2021)	First release of "Buildings In Use, Version 2020"

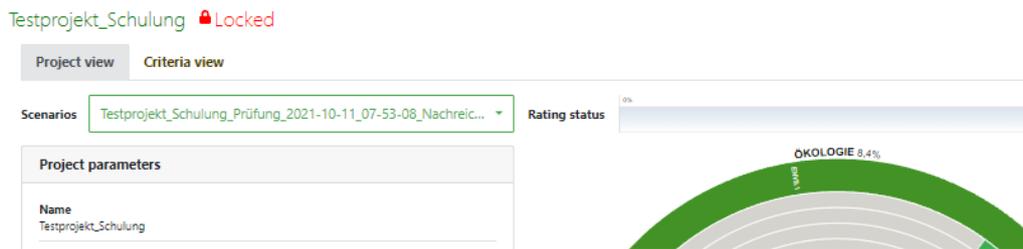
9.3 Locking a project

While the project is in the 'Ready to audit' status, it is always automatically upgraded when a new software profile version is available. However, as there are cases in which the project should not be updated, the main auditor has the option of locking the project. In the 'project view' in 'project management', there is a new button on the right-hand side with which a project can be locked or unlocked.



The screenshot shows the 'Project management' section with a list of actions: Audit report, Assessment report, Export, Auditteam management, Lock, To parent project, Create ToDo, List of ToDos, Copy scenario, Confirmations, and Compare scenario. The 'Lock' button, which features a padlock icon, is highlighted with a red box.

If the lock is active, it is only possible for the main editor to edit the project (answer questions, edit to-dos, upload documents, etc.) and the project is no longer updated automatically when a new version is available. You can tell whether a project is locked by the 'Locked' symbol after the project name.



If several people are working on a project at the same time and the main auditor locks the project, every other user will be notified that the project is locked as soon as they answer a question, edit a to-do or upload a document.

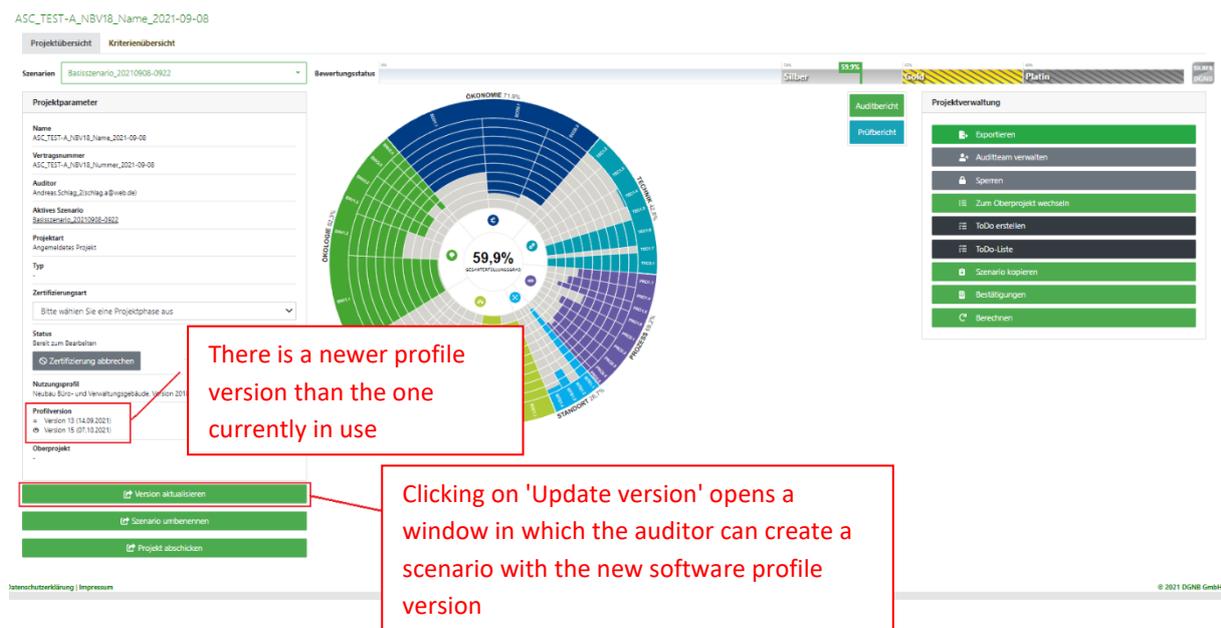
9.4 Project documentation and project lock

We recommend locking the project after downloading the project documentation. The reason for this is that it can usually take a few days for the project documentation to be signed by the client/applicant and the main auditor. To ensure that nothing changes in the project during this period and that the project documentation retains its validity.

9.5 Software profile upgrade during the test phase

Once a project is in the review phase (project status 'Review' and 'Submission'), it can only be upgraded by the main auditor or the DGNB - however, the DGNB will never upgrade a project without the explicit permission of the responsible main auditor and the client!

If an auditor receives the project back for resubmission and there is a new software profile version, the auditor can create a new scenario with the latest software profile version by clicking on 'Version Upgrade'. The old scenario remains in place and the auditor can choose whether to continue processing and submit the existing scenario with the old software profile version or the new scenario with the new software profile version.



10.FAQs

If you have any questions about the system software, please contact software@dgnb.de .

My project manager, client, auditor, or supporter is not displayed in the software

In order for a person to be added to the project in the system software, the person must have registered on our website, been approved by the editorial office **and logged into the system software once**.

No total CLPs are calculated

In the software, all questions in each criterion must always be answered. If no total CLPs are calculated, this may be due to the following points:

- Not all questions of the criterion were answered
- You do not reach the threshold/minimum value required by the criterion.

Where is the declaration of consent uploaded?

The declaration of consent can only be uploaded when you receive the project back with the project status 'Review completed'. Submit the project as normal. In the web view that opens, you will now see another field in which you can upload the declaration of consent. If you do not upload the declaration of consent, you will receive an error message and the project cannot be sent.

How do I know that the secondary requirements are not met?

If the additional requirements are not met, you will receive a warning in the audit report. If you open the error message, you will be shown which criterion does not meet the additional requirements, which degree of fulfilment is required to meet the additional requirement and which award the project will receive without meeting the additional requirements.

Furthermore, the award that can no longer be achieved by not fulfilling the secondary requirement is highlighted with a hatch in the evaluation status bar. If you move the mouse pointer over the hatching, the following message is displayed: 'Secondary requirements not fulfilled'.

How do I know the minimum requirements has not yet been met?

If a minimum requirement has not yet been met, you will receive an error message in the audit report. The project cannot be submitted as long as there is an error message in the audit report.

The audit report shows you which criterion does not meet the minimum requirements.