

ESC AUDITSYNC APPLICATION GUIDELINE

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Safety Audits and Certifications

Approval: Andy Reimer

Approved By: Andy Reimer, Manager

Safety Audits and Certifications

Next Review: 09/16/2028

SUMMARY OF CHANGES

This Summary shows:

- All changes from last approved and published document
- The location within the document where the changes have been made

Version	Date	Author(s)	Revision Notes
1.0	Sept 16, 2025	Courtney Christie	New Document



Requirements changed in the new revision will be identified with a revision triangle beside it.

SUMMARY OF REVIEWERS

The following people were involved in the review of this Process.

Name	Position
Jordan Ignacio	Coordinator, Communications
Amy Krueger	Manager, Communications
Andy Reimer	Manager, Safety Audits and Certifications
Steve Suto	VP & Chief Privacy Officer

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1.0 ABOUT THIS GUIDELINE

1.1 Purpose

The ESC AuditSync application is available to Energy Safety Canada (ESC) COR Auditors to perform on-site activities, including documentation, observation and site interviews. This tool does not require connectivity while onsite and works in conjunction with the Auditor Portal and the processes available online for completing audit questions related to a COR Audit.

This application is only applicable for COR audits, including individual and group audits, and is only applicable for any on-site activity. Registration and report-writing activities are available through the Auditor Portal.

1.2 Target Audience

This guideline applies to ESC COR Auditors:

- Candidate
- Internal
- External

1.3 Privacy Policy

At Energy Safety Canada (“ESC”), we take the issue of safeguarding privacy very seriously. We respect and are committed to protecting the confidentiality and security of Personal Information entrusted to us and ensuring that all Personal Information we hold is collected, used and disclosed in compliance with all applicable federal and provincial privacy requirements where ESC operates (“**Privacy Legislation**”).

Please refer to the full policy [here](#).

2.0 APPLICATION ACCESSIBILITY AND REQUIREMENTS

ESC has four different platforms to access the application for your selected device available on the My Account>Auditor Portal>AuditSync Offline Installers Page.

- Windows: Compatible with Windows 10 or later. Available through the Microsoft Store or with a standalone executable version also offered through the ESC auditor portal.
- macOS: Compatible with macOS 10.15 (Catalina) or later, available as a standalone executable version offered through the ESC auditor portal.
- iOS: Compatible with Apple iPhone and iPad devices running iOS 10.0 or later, available through the Apple App Store.
- Android: Compatible with devices running Android 5.0 (Lollipop) or later available through the Google Play Store.

2.1 Installation Instructions

2.1.1 macOS

Please note that if your computer has firewalls in place, Microsoft Defender may not allow you to download the application on your device.

1. Download the Installer

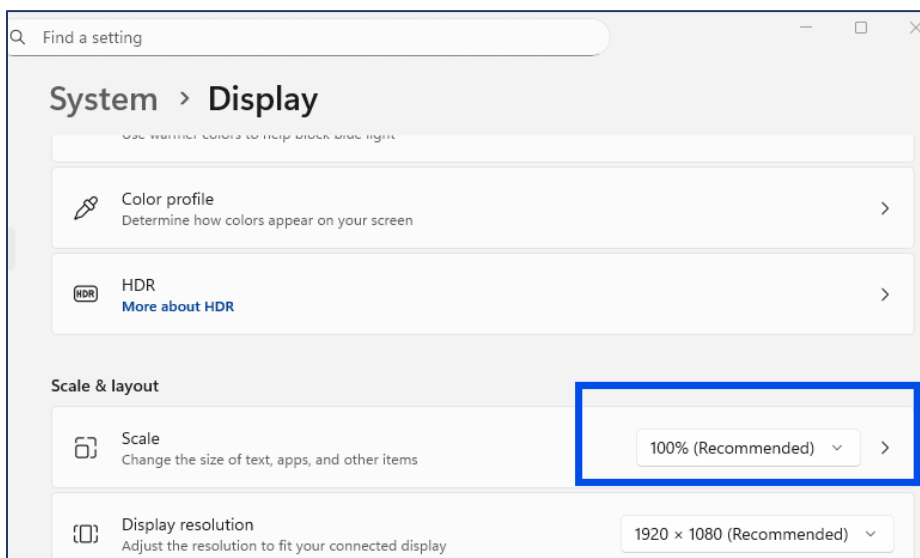
- Double-click the appropriate installer for your operating system.

2. Run the Installer

- Click **Download**
- Click **Download anyway**
- After download, click **More info**
- Select **Run anyway**
- Click **Yes** to proceed
- Click **OK**
- Click **Next**
- Click **Install**
- Click **Finish**

2.2 Display Settings

Please make sure your display settings for your device are not set to greater than 100%. If they are, you may not be able to see the minimize, maximize, and close window features. You can also click on the application logo in the top left corner to see these features.



The screenshot shows the ESC AuditSync application interface. On the left is a sidebar with navigation links: Back, Offline App, Dashboard, Recent Audits (A Safe Petroleum - TestCo), Profile and Settings, and Help Doc. At the bottom of the sidebar is a Log Out button. The main content area is titled 'A Safe Petroleum - TestCo' and 'Test Site 1'. It has three tabs: Documentation, Interviews (selected), and Observation. Below the tabs is a 'Start Interview' section with a 'Number of Interviews' input field set to 3, an 'Interview Title' input field set to 3, and a 'Role' dropdown menu set to 'Select Role'. A blue 'Save' button is at the bottom of this section. A window control bar is visible at the top right of the application window.

3.0 PREPARING FOR ON-SITE ACTIVITY

For a Registered Audit, please first visit the Auditor Portal and edit the Sites page to check off what sites you will be visiting. Then, complete the employee breakdown and planned interviews.

- To help speed up the download process, set your audit to “available for download” from the auditor portal. While this will not be downloaded the audit to your device, it will speed up the process once you have logged into the application from your device.

4.0 DOWNLOADING YOUR AUDIT

- Locate your audit in the **Online List**.
- Click to begin syncing from online to offline.
 - If it doesn't switch to “Download” automatically, click the **Refresh** button.
- Click **Download** to access the **Download Audit View**.
- Click the blue **Download Audit** button.

The screenshot shows the 'Audits' section of the application. At the top, there are 'Offline' and 'Online' tabs with arrows between them, and the 'Online' tab is selected. A 'Refresh' button with a circular arrow icon is to the right. Below this is a card for 'A Safe Petroleum - TestCo'. The card shows 'Started on 2025-08-22' and a blue 'Online' status with a checkmark icon.

Audits

Offline < > Online

Refresh

A Safe Petroleum - TestCo

Started on 2025-08-22

Pending

Audits

Offline < > Online

Refresh

A Safe Petroleum - TestCo


Started on 2025-08-22

Download

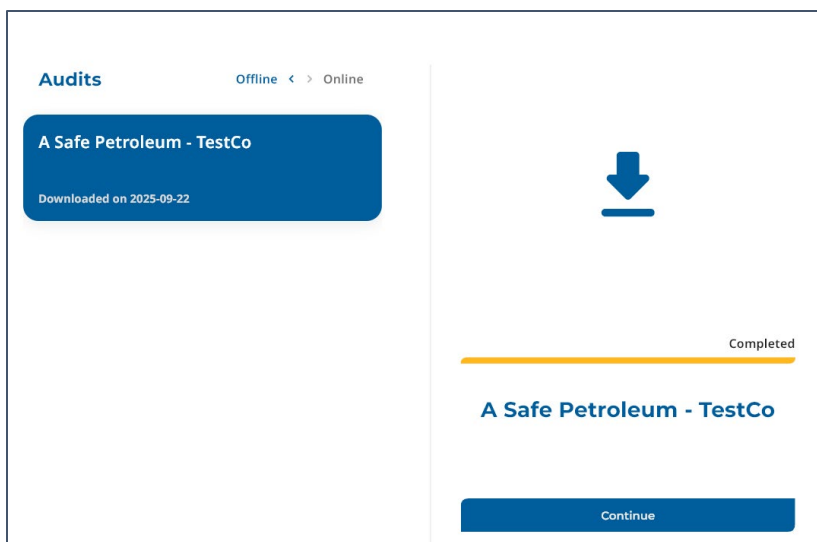
You're about to download

A Safe Petroleum - TestCo

Audit ID	Status
202504712	REGISTERED



Download Audit



Once you have downloaded the application to work on the device that you will take onsite, there are some steps that need to happen prior to going onsite or not having connectivity.

- Log in to the application while you have an active internet connection.
- Review your available audits to ensure that you can see all your active audits.
- Download your audit/audits onto your device.
 - If you do not download before losing connectivity, you will not be able to work on your audit offline.

5.0 USER PREFERENCES

- To view all scoring guidelines:
 - Go to **Profile and Settings** (left menu)
 - Toggle **Expand Scoring Guideline**
- Click **Jump Back In** to return to your last entry.

6.0 NAVIGATING THE AUDIT

- Click **Continue** to access the **Dashboard**.
- Click the yellow **Audit Box**.
- On the **Overview Page**, select your assigned site (named after each auditor).
- Site details will appear on the right-hand side.

6.1 Documentation Section

- Click the yellow **Documentation** button.
- Select the **Documentation Section** to begin editing notes and scores.

Current approved documents are maintained online. Printed copies are uncontrolled.

6.1.1 Completing Documentation

- Click **Back to Summary**.
- Mark your entry as **Complete**.

6.2 Interviews

- Click the **Interview Tab** → click + to start a new interview.
- Created interviews will appear as **In Progress**.
- Click to enter notes and scoring.
 - Singles default to “Not Asked”
 - Bulks show as “0/# of interviews”

You can switch between single and bulk via the **Configuration Menu**.

Title	Role
test	Middle Manager
Configurations >	
SECTION A ^	
A1	
A1B	Not Asked
A2	
A2B	Not Asked
A2D	Not Asked

To make the interview “Bulk” click the + beside the number of interviews

A Safe Petroleum - TestCo

Documentation Interviews Observation

Test Site 1

< Start Interview

Number of Interviews

3

-

+

Interview Title

Role

Select Role

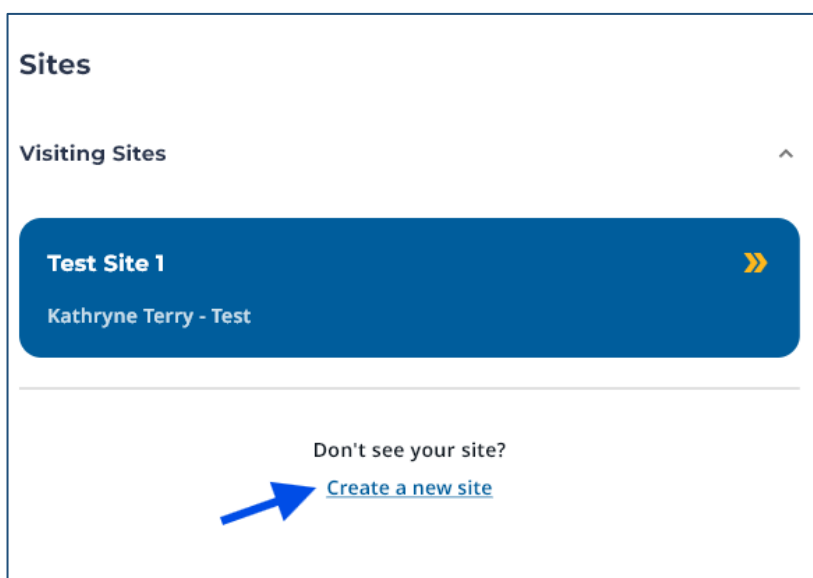
Save

6.3 Observations

- Start your observation similarly to Documentation.
- Use the left menu to return to **Overview** and **Site Page** anytime.

7.0 CREATING A NEW SITE (OFFLINE)

- **From the Sites page:** Click on Create a new Site
- **For Team Audits:** Ensure you add your initials to the start of the Site name so that it can be easily distinguished. Please note sites can only be renamed again once back online.



Sites

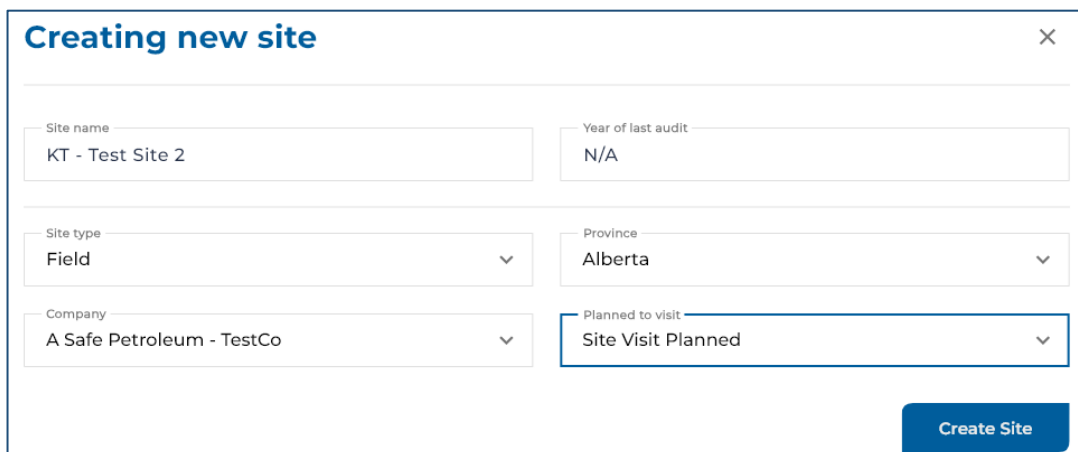
Visiting Sites ^

Test Site 1 >>

Kathryne Terry - Test

Don't see your site?

[Create a new site](#)



Creating new site X

Site name: KT - Test Site 2

Year of last audit: N/A

Site type: Field v

Province: Alberta v

Company: A Safe Petroleum - TestCo v

Planned to visit: Site Visit Planned v

Create Site

8.0 UPLOADING YOUR AUDIT

- Return to the **Overview Page**.
- Click **Upload** to sync and make your audit available online again.
 - Use Sync Changes to back up data between sites (helpful for faster uploads).

9.0 SWITCHING DEVICES

- You can download and access Audits through different devices. However, once an audit has been downloaded to a device, it cannot be accessed through other devices.
- To switch devices, you must upload your audit back to the online portal before it can be downloaded and accessed from a different device.
- If you lose access to your device (lost or damaged), you can contact ESC to unlock the audit from that device. If your audit has not been synced or uploaded to the auditor portal, onsite data may be lost. Please get in touch with the [COR Department](#) for assistance.

10.0 SAVING DATA

- Data is saved continuously and automatically in the application locally on your device
- When your device can connect to the internet, it is a good idea to sync your data. Sync data saves your data to ESC but does not remove the audit from your device. You can continue to work offline on Onsite activities
- When you have completed your onsite activities and need to start working on reporting, you must select “Upload Audit”. This process returns your audit along with any data you have reported through the Onsite activities to the Auditor Portal. Once you have Uploaded your audit, you can access it through the online portal or download it to a different device. Please note this process requires internet connectivity.

11.0 ADJUSTING SITES CREATED OFFLINE

Any sites added through the application must be reviewed in the Auditor Portal after the data has been uploaded. Auditors are required to review each newly added site by following these steps:

- Select the “Visited” box by clicking “Edit” from the Sites list.
- Update the total number of employees by role and specify how many employees will be interviewed.

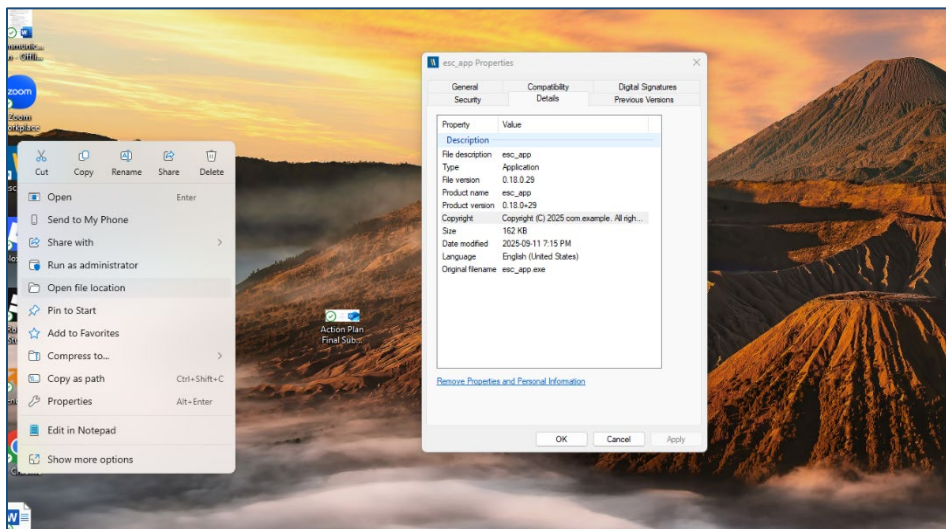
Once these steps are completed, the onsite activities will be considered finished.


12.0 TEAM AUDITS

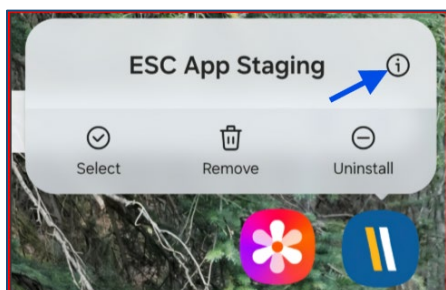
It is the Lead Auditors’ responsibility to ensure that all Team Auditors have uploaded their Audit prior to completing the Formal Audit Report.

13.0 VERSION LOCATION

For Windows and macOS, right click on your desktop shortcut to go to the file location, then right click on the application in the file location, select Properties and then go to Details.



For iOS and Android, hover over the application icon and then select the info  button to see the version number.



14.0 IMPORTANT REMINDER

Ensure that you upload your audit prior to hitting the 45 days to ensure you can enter your last day on site, if you don't do this your audit will be placed on hold by the system and will not be accessible. If this happens, please call the [COR Department](#) to have your audit unlocked.

15.0 FAQs

Q: Can I change the name of a site through the application?

A: You cannot change the name of a site through the application - however, you can upload the audit, access the audit through the Auditor Portal to make required changes to the name, then reload into your device for additional onsite activities.

Q: The guide indicates that this is an auto save document, is this instantaneous?

A: Yes, your work is being saved locally on your device (e.g., laptop, tablet, mobile device)

Q: Should we leave the offline audit tool open until we are able to sync it with the online version?

A: It is not necessary to leave the offline audit tool open. Your work is saved locally on your device and does not require internet connectivity. The application allows you to close it, so you can return to your audit later to continue with onsite activities while offline. You may shut down your device as needed. Once you regain internet connectivity, it is recommended to sync your audit. After completing your onsite work, you can upload your audit to prepare for the report writing process.

Q: With the scoring of cascading questions, if we apply the score for the initial question less than 80% but score the remaining questions as 100% will we receive an error message when we sync the audits? Or can we apply the scoring and let the online audit tool calculate the percentages?

A: It will not allow you to score 100% because the offline tool is designed that if you enter 60% for B.1b, it will change the denominator to B.1c to 60 rather than 100 and leave B.1d and B.1e at 0 until you answer B.1c then it will apply the same principle. If you go back and change B.1c it will make B1d and B.1e 0 again to make you re-enter a new score. - or leave them at 0 and you can change them online.