eProjecteXpress

Easier for Owners, easier for ESCOs,
ePX: the eXpress way to capture and report project results

U.S. DEPARTMENT OF
ENERGY
Energy Efficiency &
Renewable Energy

ESC
ENERGY SERVICES
COALITION
A Public Private Partnership

BERKELEY LAB

Your presenters for today

Dale L. Hahs, ESC

dhahs@energyservicescoalition.org

Liz Stuart, LBNL

epb-support@lbl.gov

Introducing ePX

You asked for a streamlined, flexible, customizable means of entering, saving and reporting project information in a way that fits *your* needs.

eProject eXpress (ePX) is the NEW streamlined, tailored pathway for state and local governments to document, track, and demonstrate the ongoing value of their energy retrofits.

eProjecteXpress

The eXpress solution to your project reporting needs!

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eProject eXpress (ePX) Overview

- Secure, web-based project tracking/reporting system for ESPC projects
- Free resource maintained by LBNL for U.S. DOE
- Streamlined for use by State and Local Government project practitioners
- ePX enables Program and Project Owners and their ESCOs to securely:
  - Review top level statistical summary of all reported project activity in a state
  - Preserve and track summary project and Measurement & Verification data in perpetuity
  - Self-generate reports illustrating program and project impacts including: Utility (energy and water), Environmental (GHG) and Economic (jobs) impact
  - Archive project files along with the project summary data
  - Project specific information granted to registered ePX users by per project invitation only

Benefits for *Program and Project Owners*

- Provides free, secure, web-based accessible, summary data and file storage

- Provides flexibility for state programs and/or users to define "fields to fill"

- Consolidated summary of project information and estimated achievements

- Consolidated summary of post construction and annual validated project achievements

- Provides the ability to customize data collection fields

- Energy data presented in units corresponding to utility bills

- Streamlined report generation to illustrate project and portfolio summary and results achieved

- Allows for 3rd party Project Viewers

Benefits for *Energy Service Companies (ESCOs)*

- Highly streamlined, single page project data entry forms
- Allows for consensus expectations of summary data to provide
- Enables Owners to self-produce project, portfolio or program reports as needed
- Allows for portfolio or program standardization of data and files for compliance
- Provides free, secure summary data and file storage— that is easily accessible in perpetuity

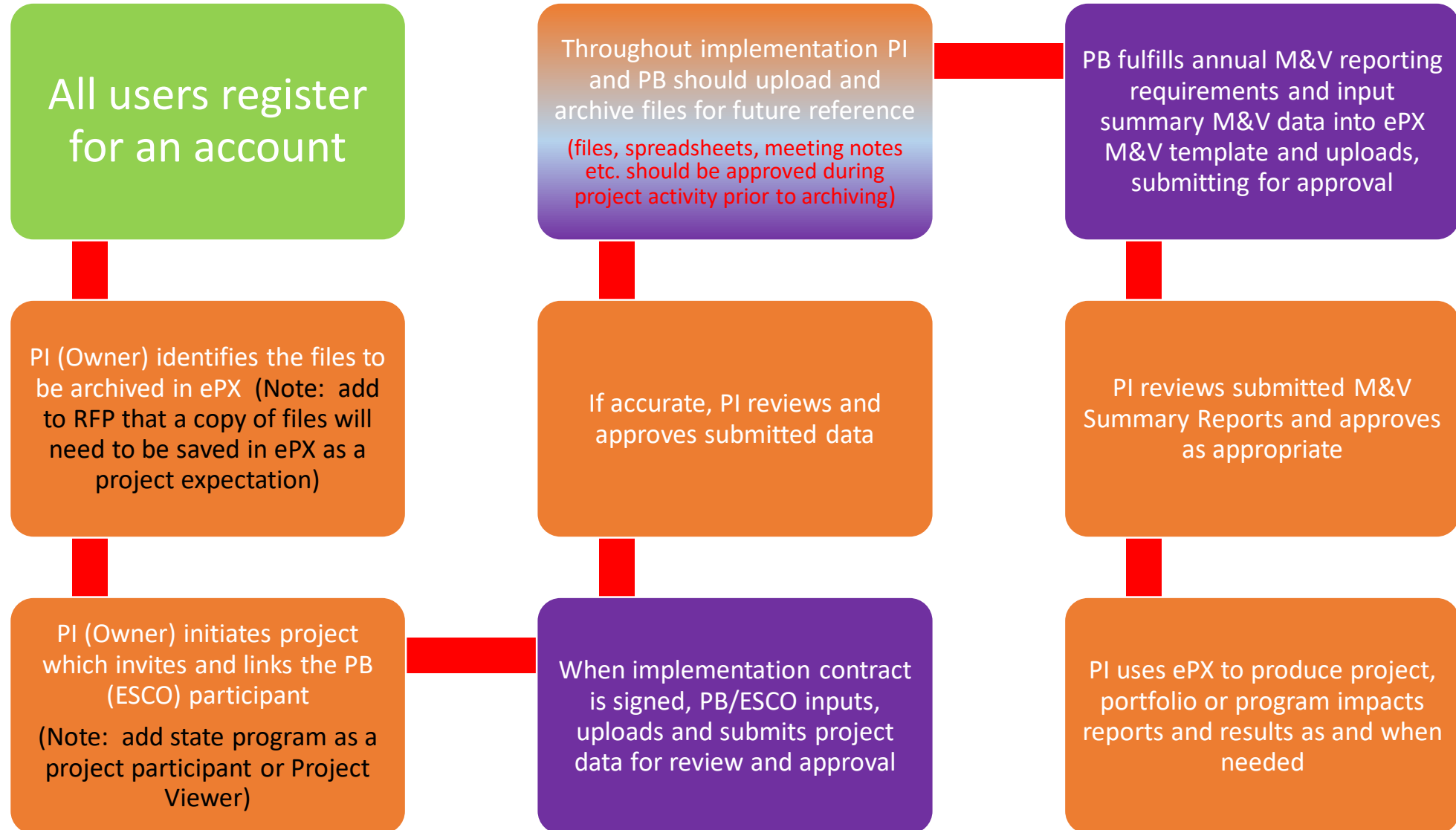# Benefits for *Program Managers and State Energy Officials*

- Enables program managers and project owners to communicate project successes to stakeholders and the public

- Allows program standardization of data and archived files

- Provides on-demand customized reporting of program impact and achievements

- Provides free, secure summary data and file storage—that is easily accessible in perpetuity

- New state roll up report allows contrast of state program portfolio vs all reported state project activity

- Can illustrate the impact of GESPC projects on state efficiency, economic and environmental stewardship goals

Typical eProject eXpress Workflow

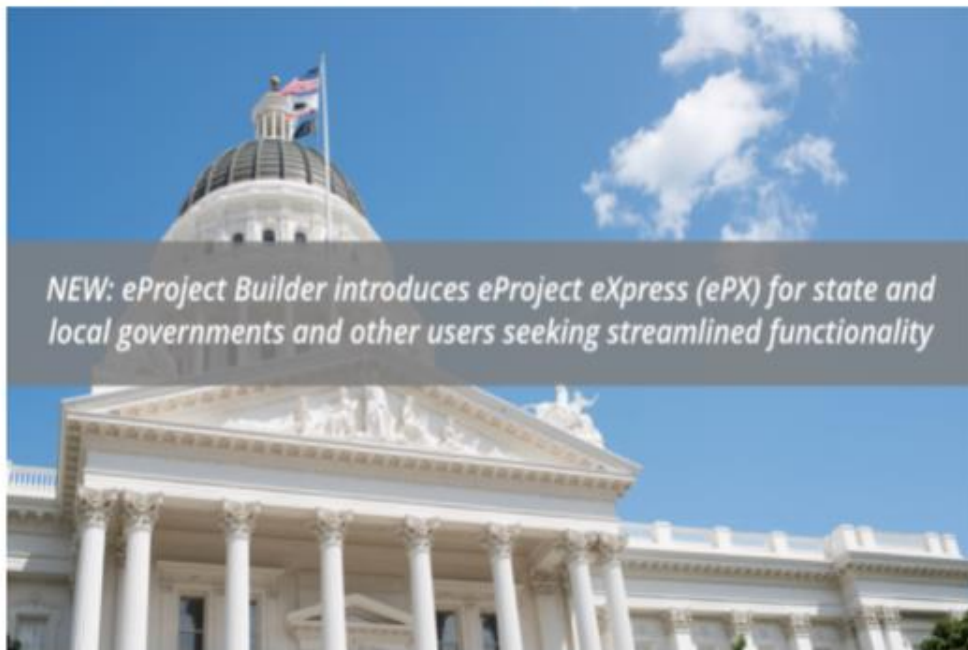Invited Project Viewers can see approved projects

All users register for an account

Throughout implementation PI and PB should upload and archive files for future reference

(files, spreadsheets, meeting notes etc. should be approved during project activity prior to archiving)

PB fulfills annual M&V reporting requirements and input summary M&V data into ePX M&V template and uploads, submitting for approval

PI (Owner) identifies the files to be archived in ePX (Note: add to RFP that a copy of files will need to be saved in ePX as a project expectation)

If accurate, PI reviews and approves submitted data

PI reviews submitted M&V Summary Reports and approves as appropriate

PI (Owner) initiates project which invites and links the PB (ESCO) participant

(Note: add state program as a project participant or Project Viewer)

When implementation contract is signed, PB/ESCO inputs, uploads and submits project data for review and approval

PI uses ePX to produce project, portfolio or program impacts reports and results as and when needed

eProject Builder

eProject Builder (ePB) is a secure, web-based data management platform that allows customers and ESCOs to preserve, track and report information for their portfolio of energy projects. Read about the benefits of ePB below.

- ePB offers a full-featured suite of capabilities for all users.
- NEW ePB introduces eProject eXpress (ePX) for state and local governments and other users seeking streamlined functionality.

Click here to learn more and see which ePB is right for your project.

NEW: eProject Builder introduces eProject eXpress (ePX) for state and local governments and other users seeking streamlined functionality

Welcome to eProject Builder

Email *

Password *

Forgot Password?

→] Login

New to eProject Builder? Request an Account?

This free system was developed and is maintained by Lawrence Berkeley National Laboratory on behalf of the U.S. Department of Energy.

First Things First

https://eprojectbuilder.lbl.gov/

Registration Page

ePB Project Statistics ▾ Help/Documentation About

eProject Builder/eProject eXpress Account Registration Form

📇 Contact Information

First Name *
First Name is required.

Last Name *
Last Name is required.

Title *
A title is required.

Organization *
Organization is required.

Address *
Address is required.

City *
City is required.

Country
United States

Zip *
Zip is required.

Office Email Address *
Email is required.

Phone Number *
A phone number is required.

💻 Accounts Requested *

🔵 Main site - to enter real ePB and ePX project data
🔵 Training site - to explore the tool for both ePB and ePX users

Secondary Email Address *
Email is required.

👤 How will you be using eProject Builder?

Select an option *
Please select an option from the list.

🎓 Would you like to attend upcoming training webinars?

Select an option
Yes

- [Register](#) for the next introductory demonstration and training webinar (held monthly)
- [Register](#) for the next advanced training webinar on the M&V module and analysis and reporting feature (held quarterly)

🎧 How did you hear about eProject Builder?

Select an option *
Please select an option from the list.

🏛 Market Segment(s) You Work In

- ⚪ Federal Government
- ⚪ State/Local Government
- ⚪ Healthcare
- ⚪ K-12 Schools
- ⚪ University/College
- ⚪ Industrial
- ⚪ Commercial (Leased)
- ⚪ Commercial (Owner-occupied)
- ⚪ Public Housing
- ⚪ Residential
- ⚪ Retail (Leased)
- ⚪ Retail (Owner-occupied)
- ⚪ Hotel/Hospitality
- ⚪ Other

- Register for account(s) on main site, training site or **both** **https://eprojectbuilder.lbl.gov/**

- 2nd email is required for training site; user receives both ESCO and customer type roles to explore complete project entry and approval cycle

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Landing Page – Choose Your Pathway for First-Time Users

After logging into

https://eprojectbuilder.lbl.gov/

visitors will be presented with a choice of pathways:

eProjectBuilder

or

eProjecteXpress

Choose the eProject Builder path that best meets your needs.

eProject Builder

eProject Builder (ePB) offers a full-featured suite of capabilities for all users.

Best for:

- Full-featured standardized calculations, project- and measure-level data
- Federal IDIQ, ESA, UESC, and direct-funded projects
- Meeting federal reporting requirements
- NAESCO Accreditation Applicants
- US DOE Qualified Provider Applicants

Visit the ePB Training Page to learn more

[Use eProject Builder]

eProject eXpress

NEW eProject eXpress (ePX) is now available for state and local governments and other users.

Best for:

- Public and private sector energy project implementors seeking streamlined functionality
- State and local governments
- Organizations recording energy project data and preserving key documents
- Organizations tracking project and program achievements

Visit the ePX Training Page to learn more

[Use eProject eXpress]

All projects reside in the eProject Builder system. Users can create and access projects under both the ePX and ePB pathways.

A quick tour around the Portfolio page

ePB | Home | Portfolio | Analysis & Reporting | Project Statistics ▾ | Help/Documentation | About

- Portfolio
- Data Export
- New Project
- Download Data Template

# of Approved Projects
7

Total Implementation Price
$ 89,886,960

Total Estimated Annual Savings
$ 63,165,325

📁 Portfolio

Search for Projects...

Action	ID	Project Name	Role	Market Segment	Sub-Market	Award/Contract Signing Date	Project Initiator Org	Project Type	Project Builder Org	Total Implementation Price	Total Guaranteed Cost Savings	Status
⋮	2512	Fall Campus #1	PI	University/College			S-energy Solutions LLC	ePX	LBNL	$2,000,000	$2,250,000	Approved
⋮	2511	August Campus	PI	State/Local Government	State/local correctional facility		S-energy Solutions LLC	ePX	LBNL	$2,000,000	$2,250,000	Approved
⋮	2510	Greensburg Correctional F…	PI	State/Local Government	State/local correctional facility		S-energy Solutions LLC	ePX	LBNL			Pending
⋮	2509	eXpress Campus	PI	K-12 Schools			S-energy Solutions LLC	ePX	LBNL			Pending
⋮	2508	Any City, USA	PI	State/Local Government	Municipality (village, town, …		S-energy Solutions LLC	ePX	LBNL			Pending
⋮	2501	Corona Campus	PI	State/Local Government	State agency		S-energy Solutions LLC	ePX	Energy Services Coalition	$5,765,325	$5,984,522	Approved
⋮	2504	Summer City	PI	State/Local Government	Municipality (village, town, …		S-energy Solutions LLC	ePX	Energy Services Coalition			Pending
⋮	2499	Swan Campus Project	PI	State/Local Government	State agency	2020-09-30	S-energy Solutions LLC	ePB	Trident Energy	$13,350,000	$17,807,605	Approved
⋮	2497	Franklin 1 Campus	PI	State/Local Government	State agency	2020-09-30	S-energy Solutions LLC	ePB	Trident Energy	$13,350,000	$17,807,605	Approved
⋮	2492	SPLHC Campus	PI	State/Local Government	State agency	2020-09-30	S-energy Solutions LLC	ePB	Trident Energy	$13,350,000	$24,495,066	Approved
⋮	2467	February Campus	PI	K-12 Schools		2020-09-30	S-energy Solutions LLC	ePB	Trident Energy	$13,350,000	$17,807,605	Approved
⋮	2461	Agency 14	PI	State/Local Government	State agency	2020-09-30	S-energy Solutions LLC	ePB	Trident Energy	$13,350,000	$17,807,605	Pending
⋮	2391	BEST GESPC EVER	PI	State/Local Government		2018-09-15	S-energy Solutions LLC	ePB	Energy Services Coalition	$10,230,000	$14,733,949	Pending

Portfolio Page – View Options

A quick tour around a Project Dashboard

Home | Portfolio | Analysis & Reporting | Project Statistics ⌄ | Applications ⌄ | Help/Documentation | About

- Dashboard
- Download Data Template
- View Project Data
- ePX Summary Archive
- ePX Project Summary
- Project Documents
- Manage Participants
- M&V

Portfolio ❯ Corona Campus

Corona Campus

Summary
ePB ID:	2501
City:	OVERLAND PARK
State:	KS
Role:	Project Builder
Project Type:	ePX

Project Status
● Pending — ● Pre-Approval — ✓ Approved

Performance Period
15 Years

Ann. Est. Savings
$ 6,395,252

👣 Next Steps

Your project is **approved** and is now available for you to enter M&V data. You may also contact the project PI to unlock the project for modifications.

⚖ Add/Edit M&V Data

ePB | Home | Portfolio | Analysis & Reporting | Project Statistics ▾ | Help/Documentation | About

viewing **ePX menu** ▾

Quick Links

Create & Manage Projects

Download ePB Template

Download ePX Template

Initiate a New Project

Manage Projects

View & Generate Reports

Generate ePB Reports

Generate ePX Reports

Training Resources

ePB Training Videos and Webinars

ePX Training Videos and Webinars

eProjecteXpress

+ New Project

Project Name *

Project name is required

Market Segment * ▾

Market segment is required

Project Type *
eProject eXpress ▾

Project type is required

Primary Project Location Zip Code *

Zip code is required

ESCO/Project Builder Email *

Project builder email is required

✓ OK   ✗ Cancel

U.S. DEPARTMENT OF **ENERGY** | Office of ENERGY EFFICIENCY & RENEWABLE ENERGY   BERKELEY LAB Lawrence Berkeley National Laboratory   2018 R&D 100 WINNER

ePB   Home   Portfolio   Analysis & Reporting   Project Statistics ▾   Help/Documentation   About

viewing **ePX menu** ▾

Quick Links

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Download ePX Template
Initiate a New Project
Manage Projects

View & Generate Reports

Generate ePB Reports
Generate ePX Reports

Training Resources

ePB Training Videos and Webinars
ePX Training Videos and Webinars

+ New Project

Project Name *

Project name is required

Market Segment *
State/Local Government

Market segment is required

Project Type *
eProject eXpress

Project type is required

Submarket *

State agency

Municipality (village, town, city)

County (parish)

Special district (water/wastewater)

State/local correctional facility

Local/county community college

✓ OK   ✗ Cancel

State and Local Submarket

ePX Project Summary

ePB

Home | Portfolio | Analysis & Reporting | Project Statistics ▾ | Help/Documentation | About

- Dashboard
- Unlock Project
- Download Data Template
- View Project Data
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Corona Campus

Summary
ePB ID: 2501
City: OVERLAND PARK
State: KS
Role: Project Initiator
Project Type: ePX

Project Status
○ Pending
○ Pre-Approval
✓ Approved

Performance Period
15 Years

Ann. Est. Savings
$ 6,395,252

Download

ePX Project Summary

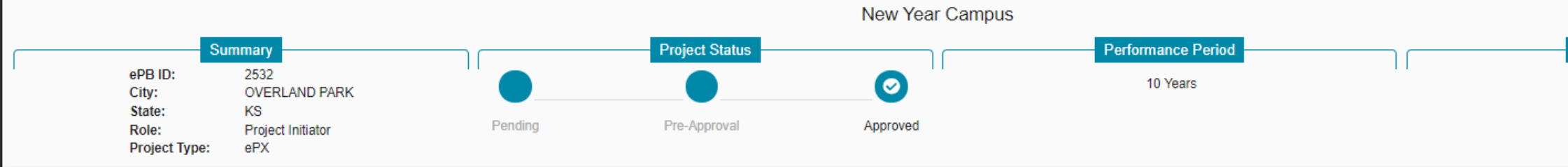### PROJECT SUMMARY: Corona Campus
BASIC PROJECT INFORMATION

	Role	Institution	Name	Title	Email	Phone
Project Contact Information	Project Facilitator		Sally Smith			
	Project Initiator (Customer)	S-energy Solutions LLC	Dale Hahs	President	dhahs@s-energysolutions.com	(913) 488-7208
	Project Builder (Contractor)	Energy Services Coalition	Dale Hahs		daleshouse@kc.rr.com	(913) 488-7208
	Finance Specialist					
	Primary Financier					

	Project Identification		Project Measures List		Project Characteristics	
Project Identification & Characteristics	Task/Purchase Order #		☐ Advanced Metering Systems		List of sites at project (separated by commas)	
	Owner's Contract #		☐ Appliance/Plug load reductions		Number of Buildings in Project	
	Project Name	Corona Campus	☑ Boiler Plant Improvements		List of Buildings in Project (separated by commas)	
	Primary Project Location-City	OVERLAND PARK	☑ Building Automation Systems/Energy Management Control Systems		Total Floor Area Affected by project (Square Feet)	351,000
	Primary Project Location-State	KS	☑ Building Envelope Modifications		Average Annual Energy Consumption of Affected Buildings (kWh/yr)	3,390,907
	Primary Project Location-Zipcode	66213	☑ Chilled Water, Hot Water, and Steam Distribution Systems		Average Annual Electric Demand Charges for Affected Buildings ($/yr)	
	Agency Name		☑ Chiller Plant Improvements		Average Annual Natural Gas Energy Consumption of Affected Buildings (units)	Ccf
	Market Segment	State/Local Government	☑ Commissioning		Average Annual Natural Gas Energy Consumption of Affected Buildings (qty)	610,454
Financing Contract Terms	Finance Contract Terms		☑ Distributed Generation		Average Annual Other1 Energy Consumption of Affected Buildings (fuel type)	
	Project Agreement Type	Guaranteed Savings	☐ Electric Motors and Drives		Average Annual Other1 Energy Consumption of Affected Buildings (units)	
	Contract Execution Date (mm/dd/yyyy)		☑ Electrical Peak Shaving/Load Shifting		Average Annual Other1 Energy Consumption of Affected Buildings (qty)	
	Primary Type of Financing	Lease	☐ Energy Cost Reduction Through Rate Adjustments		Average Annual Other2 Energy Consumption of Affected Buildings (fuel type)	
	Secondary Type of Financing		☐ Energy Related Process Improvements		Average Annual Other2 Energy Consumption of Affected Buildings (units)	
	Financing Issue Date (mm/dd/yyy)		☐ Energy/Utility Distribution Systems		Average Annual Other1 Energy Consumption of Affected Buildings (qty)	
	Project Interest Rate	2.75%	☐ Future/Other ECMs		Average Annual Water Consumption of Affected Buildings (kgal)	
	Finance Term (years)	15	☑ Heating, Ventilating, and Air Conditioning		Implementation Period (months)	
	Performance Period (years)	15	☑ Lighting Improvements		Working Days to Complete IGA	

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ePX Project Documents

- Dashboard
- Unlock Project
- Download Data Template
- View Project Data
- ePX Summary Archive
- ePX Project Summary
- Project Documents
- Manage Participants
- M&V

Portfolio > New Year Campus

New Year Campus

Summary

ePB ID:	2532
City:	OVERLAND PARK
State:	KS
Role:	Project Initiator
Project Type:	ePX

Project Status

- Pending
- Pre-Approval
- Approved ✓

Performance Period

10 Years

Project Documents

▼ File checklist

This list indicates the types of files you may want to upload to the Project Documents Area.

- Agreement approval minutes
- Base contract
- Calculations and supporting spreadsheets
- Commissioning Plan
- Commissioning Witnessing
- Construction contract (if separate)
- Construction meeting minutes
- Escalation assumptions
- Final Completion
- Financial instruments
- Full term budget commitment
- Gantt charts
- GESPC – all schedules and exhibits
- IGA, GESPC, M&V reports

- Inventory of utility meters
- Investment Grade Energy Audit
- Invoices
- Lease, COP, other finance instrument
- Lists of reported material changes
- Load study/inventory
- M&V annual reports
- M&V Plan
- Measurement and verification forms
- Owner's technical facility profile
- Post-construction pictures – zip file
- Pre-construction pictures – zip file
- Preliminary Energy Audit
- Rate commitment

- Registered municipal advisor info (if any)
- Response from prequalification
- Response to project solicitation
- RFP for prequalification (if any)
- RFP for project
- Sample utility bills
- Solicitation for financial provider
- Solicitation of subcontractors and/or designers
- Substantial completion
- Utility bill summary
- Warranty forms
- Witness forms

⬆ Upload a File   1 File, 53.7 KB of 500.0 MB

Action	File Name	Owner	Notes	Size	Upload Date
⋮	ePX_M&V_Report_2521_Year_04.pdf				2022-01-10

.docx   .xlsx   .mpp   .pdf   .jpeg   .zip

ePX M&V Reports

Streamlined M&V Summary Reports

- Generate M&V reports with the click of a button.

Annual single-year reports (see example at right).

and

	eProject eXpress ANNUAL PERFORMANCE PERIOD M&V FOR YEAR 1				
	Role	**Institution**	**Name**	**Email**	**Phone**
Project Contact Information	Project Administrator or Owner's Rep	Owner's Rep	Jane Doe	Jane@owners.com	(415) 335-1679
	Project Initiator (Customer)	ESCO-1 Organization	ESCO-1 Anderson	esco-1@test.com	(111) 222-3334
	Project Builder (ESCO)	ESCO-1 Organization	ESCO-1 Anderson	esco-1@test.com	(111) 222-3334
	ESCO M&V Specialist	M&V Specialist	John Smith	John@M&V.com	(415) 335-1679
	Other M&V Contact	Other M&V	Charlie Wright	Charlie@Otherm&v.com	(234) 345-6543
	Third Party Verifier	Third Party	Mabel Robson	Mabel@Thirdparty.com	(650) 967-7180

	Project Identification			**Annual Verified (Expected) Savings - Resource**	
Project Identification & Key Dates	ePB ID#	2441		Electricity Savings Verified for the Year (kWh)	23,532
	Project Name	ePX Test Project		Electricity Cost Savings Verified for the Year ($)	23,523
	Key Dates			Electric Demand Cost Savings Verified for the Year ($)	23,532
	Performance Year	1		Natural Gas Savings Verified for the Year (units)	MMBtu
	M&V Report Submitted Date	8/12/2020		Natural Gas Savings Verified for the Year (qty)	23,532
	M&V Report Approved Date	9/15/2020		Natural Gas Cost Savings Verified for the Year ($)	23,523
	M&V Report Due Date	8/12/2020		Other1 Savings Verified for the Year (type)	Heating Oil
	Project Acceptance Date	8/1/2019		Other1 Savings Verified for the Year (units)	kGal
	Third Party Verification Report Date	10/25/2020		Other1 Savings Verified for the Year (qty)	23,532
	Annual Verified (Expected) Cost Savings – Project-Level			Other1 Cost Savings Verified for the Year ($)	23,532
Annual Verified (Expected) Project Level Cost Savings	Verified Project Cost Savings for the Year ($)	$23,532		Other2 Savings Verified for the Year (type)	Purchased Steam
	Project Guaranteed Cost Savings for the Year ($)	$500,000		Other2 Savings Verified for the Year (units)	Ccf
	Cost Savings Shortfall or in Excess of Guaranteed Savings ($)	$23,532		Other2 Savings Verified for the Year (qty)	23,532

ePX M&V Reports

Single page cumulative report showing annual project results to date at-a-glance

Implementation Period (Year 0)	(a) Estimated Cost Savings	(b) Guaranteed Cost Savings	(c) Verified Cost Savings	(d)=(c)-(b) Variance in Implementation Period Cost Savings	Status
PERFORMANCE PERIOD M&V SUMMARY GUARANTEED AND VERIFIED COST SAVINGS					
Performance Period (Year)	(e) Estimated Annual Cost Savings	(f) Guaranteed Annual Cost Savings	(g) Verified Annual Cost Savings	(h)=(g)-(f) Variance in Annual Cost Savings	
1	$685,635	$633,421	$677,700	$44,279	Approved
2	$685,635	$646,090	$785,642	$139,552	Approved
3	$685,635	$659,011	$786,641	$127,630	Approved
4	$685,635	$672,192	$786,641		Pre-Approval
5	$685,635	$670,287			
6	$685,635	$670,287			
7	$685,635	$670,287			
8	$685,635	$670,287			
9	$685,635	$670,287			
10	$685,635	$670,287			
11	$685,635	$670,287			
12	$685,635	$670,287			
13	$685,635	$670,287			
14	$685,635	$670,287			
15	$685,635	$670,287			
16	$685,635	$670,287			
17	$685,635	$670,287			
18	$685,635	$670,287			
19	$685,635	$670,287			
20	$685,635	$670,287			
21	$685,635	$670,287			
22	$685,635	$670,287			
Total Implementation & Performance Period	$15,083,970	$14,746,314			
Implementation & Performance Period to Date [4]	Total Estimated Cost Savings	Total Guaranteed Cost Savings	Total Verified Cost Savings	Total Variance in Cost Savings	
	$15,143,971	$14,735,880	$3,036,624	$311,461	

IMPORTANT INFORMATION:

1. Negative Variance in Annual Cost Savings indicates that the Verified Annual Cost Savings are less than the Guaranteed Cost Savings.

2. Please note that Annual Verified Performance Period Savings (and Implementation Period Savings, if allowed) may change, as these totals may include M&V reports yet to be approved by the project owner.

ePX Custom Reports – can be saved and stored in Report Library

ePB Home Portfolio Analysis & Reporting Project Statistics ▾ Help/Documentation About

Analysis and Reporting

Custom Report | Report Library

Search

▾ Project - General
- ⊕ Project ID
- ⊕ Project Acceptance Date
- ⊕ User Defined Project ID
- ⊕ Purchase Order Number
- ⊕ Project Name
- ⊕ Contract Number
- ⊕ City
- ⊕ State
- ⊕ Zip Code
- ⊕ Agency Name
- ⊕ Market Segment
- ⊕ Project Builder Name
- ⊕ Project Agreement Type
- ⊕ Project Award Date/Contract Execution Date
- ⊕ Project Interest Rate (%)
- ⊕ Performance Period (Years)
- ⊕ Primary Electric Utility

Custom Report Builder

[Save Report] [Export Results]

Basic Annual Report ii

[▦ Add a Calculated Field]

⋮	Project Name
⋮	Market Segment
⋮	Project Award Date
⋮	Annual Guaranteed Cost Savings
⋮	ESCO Company Name
⋮	Total Guaranteed Cost Savings
⋮	Proj. Year N-Total Verified (Expected) annual cost savings

☑ Only include currently active projects

[Run Report]

▦ Table   ⊞ Plot

Project Name	Market Segment	Project Award Date/Contract Execution Date	Annual Guaranteed Cost Savings ($)	Project Builder Organization	Total Guaranteed Cost Savings ($)	Proj. Total Verified Annual Cost Savings ($)
BEST GESPC EVER	State/Local Government	2018-09-15	$915,488.00	Energy Services Coalition	$14,733,949.00	

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ePX State Rollup Report

- Produces a statistical rollup report for any given state.

- Provides a top-line summary of all approved projects in the database, regardless of sector or project entry pathway (ePB or ePX).

eProject Builder State Rollup Report	[State Name]	[Date of Report]
Market	Total Number of Projects Initiated in ePB	Total Investment Amount (Without Financing) ($)
State Agency		
Municipality (Village, Town, City)		
County (Parish)		
Special District (Water/ Wastewater)		
State/Local Correctional Facility		
Local/County Community College		
Healthcare		
K-12 Schools		
University/College		
Industrial		
Federal		
Commercial (Leased)		
Commercial (Owner-occupied)		
Retail (Leased)		
Retail (Owner-occupied)		
Public Housing		
Residential		
Hotel/Hospitality		
Other		

IMPORTANT INFORMATION:

(1) This table does not display any results that contain data for fewer than ten (10) projects, in order to protect the confidentiality of the data

Fields Include

- Number of Projects

- Total $ Amount

- Total Estimated Savings

- Total Guaranteed Savings

- Total Verified Savings

- Total Square Feet

- Average Annual Estimated Energy Savings (MMBtu)

- Average Annual Estimated Water Savings (kGal)

ePX Data Entry Template

eProjecteXpress
PROJECT DATA UPLOAD TEMPLATE

Tracking project results is not complete until the demonstration of achievements through measurement and verification (M&V) is fulfilled and reported.

	Role	Institution	Name	Title	Email	Phone
Project Contact Information	Project Administrator or Owner's Rep ②					
	Customer (Project Initiator)	Information populates ePB via project initiation	Information populates ePB via project initiation	Information populates ePB via project initiation	Information populates ePB via project initiation	Information populates ePB via project initiation
	ESCO (Project Builder)	Information populates ePB via project initiation	Information populates ePB via project initiation	Information populates ePB via project initiation	Information populates ePB via Project Registration or Initiation	Information populates ePB via project initiation
	Project Financial Advisor ②					
	Primary Financier/ Lending Institution ②					

	Project Identification		Project Measures Check all Included in Project ①	Project Characteristics	
Project Identification & Characteristics	Owner's Purchase Order or Task Order # ②		☐ Advanced Metering Systems	List of Sites in Project (separated by commas) ②	
	Owner's Contract # ③		☐ Appliance/Plug Load Reductions	Number of Buildings in Project ③	
	Project Name	Information populates ePB via project initiation	☐ Boiler Plant Improvements	List of Buildings in Project (separated by commas) ③	
	Primary Project Location-City	Information populates ePB via project initiation	☐ Building Automation Systems/Energy Management Control	Total Floor Area Affected by Project (Square Feet) ①	
	Primary Project Location-State	Information populates ePB via project initiation	☐ Building Envelope Modifications	Average Annual Electrical Energy Consumption of Affected Buildings (kWh/yr) ②	
	Primary Project Location-Zip code	Information populates ePB via project initiation	☐ Chilled Water, Hot Water, and Steam Distribution Systems	Average Annual Electric Demand Charges for Affected Buildings ($/y) ②	

ePX Help/Documentation

Help, Documentation and Training

eProject Builder

Upcoming Training Webinars	⌄
Data Templates	⌄
Training Documentation	⌄
Key Features and Benefits of ePB	⌄
Training Videos	⌄

eProject eXpress

Upcoming Training Webinars	⌄
Data Templates	⌄
Training Documentation	⌄
Key Features and Benefits of ePX	⌄
Training Videos	⌄

System Requirements: ePB supports Mozilla Firefox version 10.0.7 or higher, Google Chrome version 30 or higher, Safari 9, Internet Explorer 11, and Microsoft Edge. Users must also have installed Microsoft Excel 14.0 (2010/2011) or higher to be able to use the upload template functionality.

ePX Free Technical Support

- Monthly ePX training webinars.

  - Support materials, guides and on-demand training videos: https://eprojectbuilder.lbl.gov/help

- Free one-on-one support for you and your team on how to use, optimize and customize for your program.

- Assistance entering your legacy project information into ePX to create a single source for all your project reporting.

- Technical support: epb-support@lbl.gov.

eProject eXpress

Upcoming Training Webinars

This webinar will introduce and guide state and local government paid-for-by savings project participants, program managers and their ESCOs on the use of eProject eXpress (ePX) as a streamlined pathway for entering and reporting data from energy efficiency projects like ESPC. All webinars cover the benefits of data collection, management and reporting, typical project workflow, a walk through of the data template, and a live demonstration of the website resource.

Current Webinar Presentation Slides

Introductory ePX webinars
Upcoming webinars are scheduled for the following dates and times:

For answers to your questions

Thank You!

Register for an account: https://eprojectbuilder.lbl.gov

Contact:
- Liz Stuart, Berkeley Lab: epb-support@lbl.gov.
- Dale L. Hahs, ePX Training Team: dhahs@energyservicescoalition.org