eProject eXpress

Measurement and Verification User Guide: Getting Started with eProject eXpress M&V

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

BERKELEY LAB

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Purpose of this Guide

This guide covers the necessary information needed to begin using the eProject eXpress (ePX) Measurement and Verification (M&V) features.

ePX is a streamlined pathway within the eProject Builder (ePB) online system for entering project and M&V data, archiving and accessing project files, and reporting project results. All data entered into the ePB system populate the same database, whether entered via the streamlined ePX pathway or the original ePB pathway.

Before reading and using this guide, please review the ePX Quick Start Guide so that you understand the fundamentals of project roles and entering, submitting and approving project data.

Software Requirements

Browser requirements for all users

- Firefox 10.0.7 or higher
- Google Chrome 30 or higher
- Safari 9 or higher
- Internet Explorer 11 or higher
- Microsoft Edge

Software requirement for data template use and project uploading (primarily for contractors)

- Excel 14.0 (2010 on Windows, 2011 on Mac). ePB/ePX does not work with Excel 2007.

Training vs. Main Site

The ePX training site (epb-test.lbl.gov) functions the same as the main site where real projects are entered (eprojectbuilder.lbl.gov). However, the training site provides a space where users can explore how ePX works from both the Project Initiator and Project Builder perspectives.

- In order to use the training site, users must provide email addresses for both a customer and ESCO type account when they register for an account in order to explore the whole project initiation and entry cycle.

The ePB/ePX main site (eprojectbuilder.lbl.gov) is where actual projects are entered. The main site requires separate log-in credentials from the training site. It is recommended that users register for both the test site and the main site during the initial registration process. Once users are registered, the training site can be accessed at epb-test.lbl.gov.

User Roles within eProject eXpress

- **Project Initiator (PI):** Individual (typically the project customer or owner organization) that initiates the project. The PI is responsible for initiating, reviewing and approving projects, unlocking projects for modification, and identifying the Project Builder (the user that enters and submits project data). The PI may also authorize individuals to be Project Viewers (users with read-only access to projects) by adding them as a PV under the "Manage Participants" feature on

Email: epb-support@lbl.gov
Phone: 510-486-7442
Web: eprojectbuilder.lbl.gov

the project dashboard. The PI may also save and review stored documents that are uploaded and accessed on the project dashboard in the ePB system. With the exception of the modification/approve buttons, the PI has read-only access to project data; the PI cannot modify project data.

- **Project Builder (PB):** Individual at the energy services company (ESCO), utility or other project implementer that uploads the project information and submits it in the ePB/ePX system for PI approval. The PB is able to enter project data and M&V data and is the only person who has read-write access for project data. Like the PI, the PB may add Project Viewers to a project, and is also able to save and review stored documents.

- **Project Viewer (PV):** Authorized viewers of project-level information. PVs are authorized to access project data by a project's PI or PB at any time from project initiation onward. PVs have read-only access to data for projects that are in approved status (i.e., the data has been submitted by the PB and approved by the PI). When a new PV is added to a project, the PI and PB are notified automatically via email.

- **Project Initiator-Project Builder (PI-PB):** When a PI names him or herself as the PB during project initiation, that user takes on the PI-PB role on the project. The PI-PB role includes all aspects and access levels of both the PI and PB roles.

Preparing Your Project for M&V Data

To explore the ePX M&V feature, you must first initiate enter and approve a project's data in the system. Once a project has achieved "Approved" status in the online system, the user may access the M&V data upload template and other M&V features for that project. Learn more about the project initiation and approval process in the ePX Quick Start Guide.

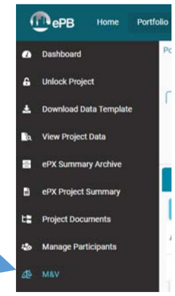
We recommend that you explore ePX functionality on the training site before initiating real projects in the ePB main site and that you begin by reviewing the ePX Quick Start guide. Then, register for an account, initiate an ePX project, upload a populated ePX data template, submit and approved the project. Once you have completed those steps, you are ready to complete the next steps in this Quick Start ePX M&V Guide. When you are familiar with how the ePX M&V functionality works, you will be well-informed and ready to work with real project data in the main site (eprojectbuilder.lbl.gov).

The following instructions apply to both the training site and the main site.

Project Builder: Downloading a Template & Entering M&V Project Data

1. The Project Builder and the Project Initiator should agree in advance regarding which M&V data fields the Project Initiator wants or requires be completed.

2. Once a project has been entered, submitted and approved in the online system, the M&V features become available. When a project is approved, notification emails are sent to both the Project Initiator and the Project Builder. To begin the process of downloading the M&V template in preparation for entering M&V information, the Project Builder logs onto the site, and navigates to the Portfolio page. The Project Builder then clicks the link of the project to which they wish to add M&V data in order to access the project dashboard. From the project dashboard, click the M&V link at the bottom of the left sidebar (see screenshot at right), or follow the "Next Steps" instructions in the center of the screen.

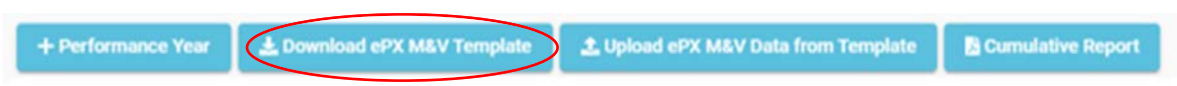


3. ePX M&V templates are project-specific. Thus, in order to add M&V data to a particular project, the user must download the specific M&V template for that project, as it comes pre-populated with key identification information for that project.

   Reminder: only projects that have been submitted and approved will display the M&V options.

4. Upon clicking the M&V link, the user will be taken to the M&V summary page, which will display the four button options (see screenshot below).

5. The first step for entering M&V data using the ePX M&V Template, is to click the "Download ePX M&V Template" button and save the project-specific template on the user's hard drive (see screenshot below). The downloaded template will have several fields pre-populated, based on the original project information entered.



6. Working offline, the Project Builder completes the M&V data template by entering the information into the yellow-highlighted fields, selecting drop-down options where presented and checking all of the energy conservation measure and non-facility measures boxes for the measures included in the project.
   a. Note that only two fields on the template are required to be completed: Performance Year and M&V Report Submitted Date.
   b. Select the Performance Year by using the drop-down field. Year 0 represents the implementation period (or construction period) for the project measures. The implementation period may encompass more or less than a 12-month period. All other Performance Years represent a full year of project performance.

7. Note: State programs may produce a list of fields they require ESCOs to complete in the M&V template as a condition of participating in their state programs. Absent this direction, ESCOs are encouraged to complete all of the yellow-highlighted fields.

8. To upload the populated M&V template for the chosen project:
   a. Navigate to the Portfolio page.

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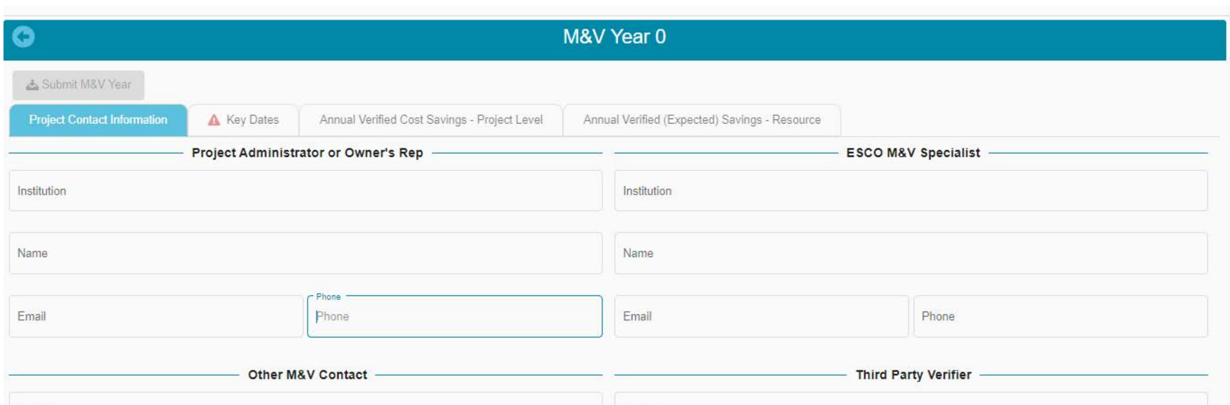
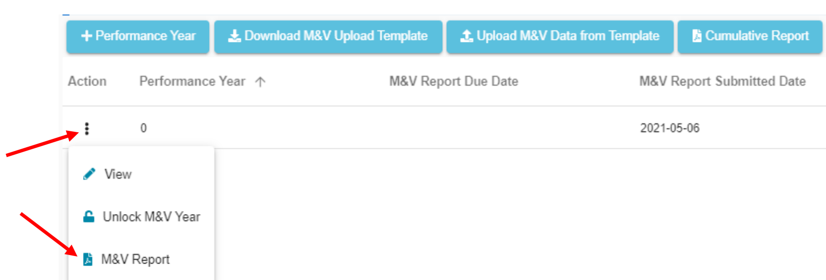
Web: eprojectbuilder.lbl.gov

b. Find the chosen project, and click on the Project Name to navigate to the Project Dashboard.
c. Click M&V link in the left-hand sidebar, or as indicated by the “Next Steps” instruction in the center of the screen
d. Click the “Upload ePX M&V Data from Template” button

9. Once the M&V Data Template is uploaded, the Project Builder will automatically be taken to the M&V user interface tabs (see screenshot below), where the Project Builder can make any additional necessary edits before submitting the M&V year for review by the Project Initiator.

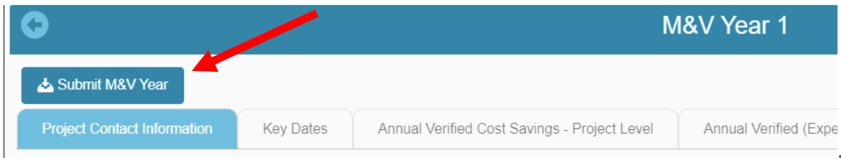


10. The Project Builder can also download and review an annual M&V report (pdf format) that captures the entered information. To do so, return to the M&V summary page, click the action menu (3 dots) for the desired M&V year, then choose “M&V Report” from the dropdown list (see screenshot below).



Note: It is strongly recommended that the Project Builder upload and store the completed ePX M&V data entry in the Project Documents repository (available from the project dashboard) to have it readily available in case it needs to be modified.

11. When the Project Builder is ready to submit the M&V Performance Year data for Project Initiator review and approval, the next step is to click the "Submit M&V Year" button (see screenshot below).



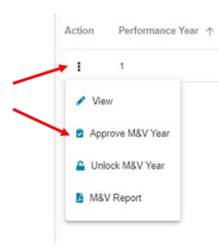
    a. The M&V status for the submitted Project Year will change to "Pre-approval" when viewed on the M&V Summary page.

12. The Project Builder can also choose to enter M&V data manually in the online user interface rather than uploading the M&V Data Template. To enter M&V data manually, do not download and upload the ePX M&V Template. Instead, select the +" Performance Year" button (see screenshot below) and choose the appropriate performance year from the dropdown menu.

    a. The Project Builder can then enter M&V data for the year manually by completing the fields on the M&V data tabs. The M&V Report Submitted Date on the Key Dates tab is a required field and must be completed. Once the data has been completed, the Project Builder can submit the M&V year for approval by the Project Initiator by clicking the Submit M&V Year button.

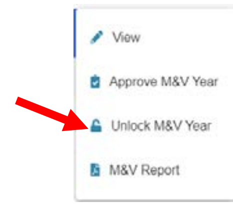
Project Initiator: Approving Projects

13. After satisfactory review, the Project Initiator can then approve the M&V summary report submission online. From the Portfolio page, click on the desired project name, then click on the M&V link in the side panel. Then, click on the appropriate Performance Year (the status should say "Pre-Approval"). Click the Action indicator (3 dots). From the options displayed, click on "Approve M&V Year" (see screenshot at right). After confirming this selection, the Performance Year status will change from Pre-Approval to Approved.



Project Initiator: Unlocking an M&V Project Year for Modification

14. If the customer or ESCO determines a project's M&V Project Year data needs to be modified for a performance year that has already been approved, the Project Initiator must unlock the project to make it available for the Project Builder to modify the data (e.g., via uploading a modified ePX M&V data template or by making changes manually online). To unlock a project M&V Performance Year, the Project Initiator must:



a. Navigate to the Portfolio page.

b. Select the desired project and click M&V in the Side Panel. Click the Action icon (3 dots)

c. Click "Unlock M&V Year" from the displayed choices (see screenshot to right).

The project will revert back to "Pending" status, and the Project Builder will be able to modify the project M&V Performance Year and re-submit for Project Initiator approval.