



# eProjecteXpress

## User Guide: Getting Started with eProject eXpress

U.S. DEPARTMENT OF  
**ENERGY**

Energy Efficiency &  
Renewable Energy



**BERKELEY LAB**

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## Purpose of this Guide

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This guide covers the necessary information users need to begin using the eProject eXpress pathway in eProject Builder (ePB) ([eprojectbuilder.lbl.gov](http://eprojectbuilder.lbl.gov)).

ePX is a streamlined pathway for entering data into and reporting from eProject Builder. As such, references to ePB/ePX are of the same overall system.

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## Software Requirements

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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.

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## Website Access – Main Site vs. Training Site

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The ePX training site ([epb-test.lbl.gov](http://epb-test.lbl.gov)) is the same as the main site but is for demonstration purposes only to help users learn how ePB/ePX works.

- For the training site, users are encouraged to provide email addresses for both a customer and ESCO type account in order to explore the whole project initiation and entry cycle.
- To get started using the training site, please follow steps 1 through 19 below.

The ePB/ePX main site ([eprojectbuilder.lbl.gov](http://eprojectbuilder.lbl.gov)) is where actual projects are entered. The main site requires separate log-in credentials from the training site and will present you with the opportunity to enter your projects via ePB or ePX.

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## Roles in ePX

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Each project in ePX has a Project Initiator and a Project Builder, each of whom has the option to add Project Viewers.

- **Project Initiators or PIs** (typically customer-side individuals) are responsible for initiating and approving projects.
- **Project Builders or PBs** (typically ESCOs) are generally responsible for entering and submitting project data, including M&V data.
- **Project Viewers or PVs** can be added by the Project Initiator or Project Builder once a project has been approved, and can view projects but not make any changes.

Users can assume both the Project Initiator *and* Project Builder roles in ePX if they both initiate the project and then designate themselves as the Project Builder. These PI-PBs have both the PI and PB responsibilities as described above.

When the state energy office (or agency having oversight of performance contracting in the state) is not the PI or customer/owner, they should be invited as a Project Viewer.

The table below summarizes the different roles and responsibilities in ePX.

Project Initiator	Project Builder	Project Viewer
 <ul style="list-style-type: none"> <li>Registers</li> <li>Initiates project which invites the ESCO</li> <li>Reviews project data</li> <li>Approves submitted project</li> <li>Unlocks project for revision, if necessary</li> <li>Invites Project Viewer(s)</li> </ul>	 <ul style="list-style-type: none"> <li>Registers</li> <li>Enters project data</li> <li>Reviews project data with customer</li> <li>Uploads project data</li> <li>Submits project for approval</li> <li>Revises project data, if necessary</li> <li>Invites Project Viewer(s)</li> </ul>	 <ul style="list-style-type: none"> <li>Registers</li> <li>Views project information once invited</li> </ul>

- By default, each project can only have one email address associated with the PI account and one address associated with the PB account. Should an ePX project administrator need to assign multiple PBs for special cases, please contact [epb-support@lbl.gov](mailto:epb-support@lbl.gov) with that request.
- The instructions below detail how to get started using the ePX pathway into ePB ([eprojectbuilder.lbl.gov](http://eprojectbuilder.lbl.gov)). These instructions assume that the PI is a customer or owner, and that the PB is a representative of an ESCO, utility, or other contractor.
- If you are a project stakeholder who will not be initiating a project or entering project data but needs to have access (e.g., state energy office, a third-party owner's rep or project facilitator), please ask the PI or PB to add you as a Project Viewer (see "Adding Project Viewers" at the end of this document) to the relevant project(s).

The next several sections of this guide provide a step-by-step process to initiate and enter data for ePX projects, and submit and approve the project data in the database.

## Project Initiator: Initiating a Project

1. The customer point of contact (POC) logs into the site, accepting the Terms of Use. A window pops up asking for your verification code, which is emailed to you upon logging in. Check your email and paste that authorization code into the box in ePB/ePX to complete your login process.
2. To change the temporary password after the first-time logging in, go to the pulldown menu under your name in the upper right of the screen and select "Update Password." A window pops up in which you can enter a customized password.
3. The customer initiates the project by clicking the "Initiate new project" prompt (via a drop-down on the home page or a button on the Portfolio page). Enter information for the fields presented.

Be sure to have the Project Builder POC email (the email with which the Project Builder POC registered with ePB) handy and ready to enter.

**IMPORTANT! The Project Builder contact must already be registered in ePB (the main site, not the training site) before the customer can assign them to a project as a Project Builder.**

4. Once initiated, the project status will show up on your Portfolio page and will be in "Pending" status.
5. The system will automatically email the Project Builder that a new project has been initiated by the Project Initiator and awaits data upload. Note that the Project Initiator cannot see project data online until the Project Builder submits the data for customer review online. This can potentially require significant time, but does not preclude the ability for the Project Builder to share the data template (e.g., by email) with the Project Initiator and others in the customer organization.

## Project Builder: Uploading & Entering Project Data

6. The Project Builder logs onto [eprojectbuilder.lbl.gov](http://eprojectbuilder.lbl.gov), accepts the Terms of Use and enters the verification code that was sent to their email when they logged on.
7. To change the temporary password after the first time logging in, go to the pulldown menu under your name in the upper right of the screen and select "Update Password." A window pops up in which you can enter a customized password.
8. The Project Builder and the Project Initiator or Owner should have already agreed to the use of ePX (or ePB) and which data fields the Owner wants or requires to be populated.
9. To enter project data by uploading the ePX Excel-based Data Template, the Project Builder downloads the ePX Excel data template from the site. The ePX Data Template can be downloaded from either the Home or the Portfolio page.

- a. Working offline, the Project Builder completes the data template.
  - i. Fill in yellow fields.

**Note: State programs may wish to create a list of fields they require be filled-in for participation in their state programs. Absent this direction, ESCOs are encouraged to complete all yellow fields.**

- b. To upload the template for the chosen project, the Project Builder:
  - i. Navigates to the Portfolio page.
  - ii. Finds the chosen project, and clicks on the Project Name to navigate to the Project Dashboard.
  - iii. Clicks "Upload Data Template" link on the left-hand sidebar OR by using the "Upload Data Template" button in the Next Steps box.

10. Once the project data is uploaded, the Project Builder can view or edit the project data online, or download a pdf of the completed ePX template form if desired.

**Note: It is strongly recommended that a copy of the completed ePX data entry template be uploaded and stored in the Project Files repository.**

11. When the Project Builder is ready to submit the project online for Project Initiator approval, navigate to the Project Dashboard and click "Submit Project" on the left-hand sidebar or in the Next Steps box.
  - a. Once the Project Builder has clicked "Submit," they will no longer be able to upload or edit project data (unless the Project Initiator unlocks the project for modifications).
  - b. The project status will change to "Pre-approval" when viewed on the Projects Summary page.

## Project Initiator: Approving Projects

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12. Once the Project Builder has submitted a project online, the Project Initiator will receive an automatic email notification that a project awaits approval.
13. After satisfactory review, the Project Initiator can then approve the project online and archive the project data to the database by logging into [eprojectbuilder.lbl.gov](http://eprojectbuilder.lbl.gov). Navigate to the Portfolio page. Click on the desired project name (the status should say "Pre-Approval"). You will be taken to the Dashboard.
14. Click the "Approve Project" link on the left-hand sidebar or the "Approve Project" button in the Next Steps box. On the Approve window, click the "Approve Project" button and the project will be approved and committed to the database.
15. The project status will change to "Approved" when viewed on the Portfolio page. Archived schedules are available under the Action menu on the Portfolio page or on the sidebar of the Dashboard.

**Note: A Quick Start Guide for using the Measurement and Verification M&V Template is separately available in the support resources.**

## Project Initiator: Unlocking a Project for Modification

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16. If the customer or ESCO determines that project data needs to be modified for a project 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 data template or making changes manually online). It is recommended that all changes be made to the ePX Data Template and uploading which overwrites all of the existing data with the new/edited and uploaded data. In this way an accurate ePX Data Entry Template can always be archived in the "Document Storage" section. To unlock a project, the Project Initiator must:
  - a. Navigate to the Portfolio page.
  - b. Locate the desired project and click the gear icon under the Actions column.
  - c. Click "Unlock."

The project will revert back to "Pending" status, and the Project Builder will be able to modify the project and re-submit for Project Initiator approval. The Project Builder will automatically receive an email alerting that the project has been unlocked.

## Project Initiator or Project Builder: Adding a Project Viewer

17. After a project has been initiated, the Project Initiator or Project Builder can add another registered user as a Project Viewer.
18. To add a Project Viewer, navigate to the Portfolio page and click the desired project name. Click the "Manage Project Participants" link in the left-hand sidebar. Click the "Add Project Viewers" button and enter the email of the registered user.
19. The Project Viewer will be notified via email that they have been assigned as a Project Viewer to the project.

The following sections highlight additional features in ePX that benefit state, local and other public and institutional organizations that use the system.

## Uploading and Preserving Project Document Files

After a project has been initiated, the Project Initiator or Project Builder can upload, store and archive all manner of project documents that may be kept online with the project in perpetuity. Users may upload files of all types, (e.g., docx, .jpg, .pdf, .xlsx, .zip).

To upload documents, navigate to the Portfolio page and click the link of the project you wish to store documents to go to that project's dashboard. In the left hand panel, click the "Project Documents" link. You will be presented with a blank table and a button that says "Upload a File." Click that button to begin uploading.

ePX projects also provide a handy checklist of recommended types of files to save with your project. Each project owner or program has the option to determine which files they wish to upload and/or require that their ESCO upload. The Project Initiator, Project Builder and Project Viewer will be able to access and download projects. Users always have the option of using Microsoft Office protection to any Word and Excel documents they upload – and sharing password information via email to other parties that need access to those documents.

## State-Level Rollup Report

The state-level rollup report enables registered ePB/ePX users to export key statistics for a specific U.S. state, pulled from current data for all projects in eProject Builder (ePB) that are in Approved status. The rollup report excludes projects that are in Pending and Pre-Approval status.

**IMPORTANT:** Please note that the information in eProject Builder only reflects projects entered by users; it does not represent all activity in a given state.

This state-level rollup report provides a number of key benefits including the following:

- Provides state ESPC programs with top-line rolled-up statistics about energy services projects in eProject Builder, including: total dollar investment amount, total estimated cost savings, total proposed guaranteed cost savings, total verified cost savings, total project square footage,

- average annual estimated energy savings, average annual estimated water savings, and number of projects included in the each statistical results'
- Enables state ESPC programs to compare investment, projected and guaranteed savings and other information for projects in ePB with their own program statistics and results

To access the state-level rollup report, navigate to the "Project Statistics" tab at the top of the ePB website and choose "ePB State Rollup Report" from the small dropdown menu. Once on the Rollup Report page, simply choose a state from the dropdown menu and click the "Download report" button. You will be able to save the exported Excel file on your computer.