



eProjecteXpress

Getting Started with eProject eXpress (ePX)



Registering for eProject eXpress

eProject Builder/eProject eXpress Account Registration Form

Contact Information

*Please note that if multiple people on your team need access to ePB/ePX, you may want to consider creating an office-wide email account that can be accessed by multiple users. Ask your IT department to create a new email account (such as ePBTeam@company.com), then register for a new ePB account with that address.

<input type="text" value="First Name *"/> <small>First Name is required.</small>	<input type="text" value="Last Name *"/> <small>Last Name is required.</small>
<input type="text" value="Title *"/> <small>A title is required.</small>	<input type="text" value="Organization *"/> <small>Organization is required.</small>
<input type="text" value="Address *"/> <small>Address is required.</small>	<input type="text" value="City *"/> <small>City is required.</small>
<input type="text" value="Country"/> United States	<input type="text" value="Zip *"/> <small>Zip is required.</small>
<input type="text" value="Office Email Address *"/> <small>Email is required.</small>	<input type="text" value="Phone Number *"/> <small>A phone number is required.</small>

How will you be using eProject Builder/eProject eXpress?

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

How did you hear about eProject Builder/eProject eXpress?

Select an option *

Please select an option from the list.

Accounts Requested *

Main site - to enter real ePB and ePX project data

Training site - to explore the tool for both ePB and ePX users ?

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

Creating an office-wide email address for use with ePX is recommended

- Streamline multiple user access to the same project data
- Minimize impacts of staff turnover

[Request Account\(s\)](#)

[Back to Login](#)






Project Roles in ePX

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, also known as Project Owners) 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 and their data but not make any changes.

Users can assume both the PI and PB 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.

Project Initiator	Project Builder	Project Viewer
 <ul style="list-style-type: none">• Registers• Initiates project which invites the ESCO• Reviews project data• Approves submitted project	 <ul style="list-style-type: none">• Registers• Enters project data• Reviews project data with customer• Uploads project data	 <ul style="list-style-type: none">• Registers• Views project information once invited



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.



Initiating a New Project

+ 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

The Project Initiator selects “Initiate a New Project” from the Home page or Portfolio page

- Enter the project name and market segment
- Be sure to select eProject eXpress under Project Type
- Enter the ZIP code of the primary project location
- Enter the email address for your Project Builder/ESCO – they must already be registered in ePX
- Your new project will be added to the Portfolio:

The screenshot shows the ePB web application interface. The top navigation bar includes links for Home, Portfolio, Analysis & Reporting, Project Statistics, Applications, Help/Documentation, and About. The main content area displays a summary of the Portfolio with two key metrics: "# of Approved Projects" (6) and "Total Implementation Price" (\$ 78,001,914). Below this is a "Portfolio" section with a search bar and a table of projects. The sidebar menu on the left includes options for Portfolio, Data Export, New Project, and Download Data Template. The "New Project" option is highlighted in the sidebar.

Action	ID	Version	Project Name	Role	Market Segment	Sub-Market	Federal Contract Type
⋮	4830	epx	New Project Test	PI-PB	University/College		
⋮	3759	3.0	Liz test 2 accred	PV	K-12 Schools		
⋮	3879	3.0	Liz test 1	PI-PB	K-12 Schools		
⋮	4162	3.0	Liz test May 30	PB	State/Local Government	Municipality (village, town, city)	



The Project Dashboard

The screenshot shows the Project Dashboard for a 'New Project Test'. The top navigation bar includes 'Home', 'Portfolio', 'Analysis & Reporting', 'Project Statistics', 'Applications', 'Help/Documentation', and 'About'. The user is logged in as 'drobson@lbl.gov'. The left sidebar contains various actions like 'Dashboard', 'Approve Project', 'Download Data Template', 'Upload Data Template', 'Edit Project Data', 'ePX Summary Archive', 'ePX Project Summary', 'Project Documents', and 'Manage Participants'. The main content area is titled 'New Project Test' and is divided into four sections: 'Summary', 'Project Status', 'Performance Period', and 'Ann. Est. Savings'. The 'Summary' section displays project details: ePB ID: 4830, City: SAN FRANCISCO, State: CA, Role: Project Initiator/Builder, and Project Type: ePX. The 'Project Status' section shows a progress bar with three stages: Pending (active), Pre-Approval, and Approved. The 'Performance Period' section shows 'Years' and the 'Ann. Est. Savings' section shows '\$'. A 'Next Steps' box provides instructions on how to proceed based on the project's status.

Summary	Project Status	Performance Period	Ann. Est. Savings
ePB ID: 4830 City: SAN FRANCISCO State: CA Role: Project Initiator/Builder Project Type: ePX	Pending Pre-Approval Approved	Years	\$

Next Steps

Your project is in **Pending** status. You may enter data by uploading a populated ePX project data template to the database OR by entering it manually through the Project Data screens. When project data is complete, you may click "Approve" to commit it to the database.

[Upload Data Template](#) [Enter/Edit Project Data](#) [Approve Project](#)

Selecting the name of your new project on the Portfolio page will take you to the **Project Dashboard**

- Next Steps prompt you to download the data template, enter data directly via the User Interface (UI) (not using the template), or approve the project
- The Summary section shows basic information that identifies your project
- Add Project Viewers by clicking on the “Manage Participants” link on the left menu



The Project Dashboard: Project Documents

Summary

ePB ID: 2009
City: LOS ANGELES
State: CA
Role: Project Initiator/BUILDER
Project Type: ePX

Project Status

Pending Pre-Approval Approved

Performance Period

10 Years

Ann. Est. Savings

\$ 5,000,000

Project Documents

File checklist

Upload a File 11 Files, 1.6 MB of 500.0 MB

Action	File Name	Owner	Notes	Size	Upload Date
⋮	All Contracts.zip	ESCO-1 Anderson	Zip file with final approved IGA ...	44.9 KB	2024-02-23 2:32 PM
⋮	Commissioning Plan.zip	ESCO-1 Anderson	Commissioning plan documents	36.2 KB	2024-02-23 2:33 PM
⋮	ePX_Template-MyProject-Final...	ESCO-1 Anderson	Final ePX template at project a...	516.0 KB	2024-02-23 2:34 PM
⋮	Final Agreed Escalation Table.pdf	ESCO-1 Anderson	Escalation table - final - 10/10/21	36.3 KB	2024-02-23 2:34 PM
⋮	IGA Data.zip	ESCO-1 Anderson	All IGA data, engineering results	30.8 KB	2024-02-23 2:35 PM
⋮	IGA Meeting Minutes.zip	ESCO-1 Anderson	Meeting minutes - IGA	36.0 KB	2024-02-23 2:35 PM
⋮	Implementation Meeting Minute...	ESCO-1 Anderson	Meeting minutes - implementati...	36.0 KB	2024-02-23 2:35 PM
⋮	M and V reports years 1 through...	ESCO-1 Anderson	Zip file - M&V reports years 1-3	22 B	2024-02-23 2:36 PM
⋮	Pre-Construction Photos.zip	ESCO-1 Anderson	Pre-construction photos - 2021	801.9 KB	2024-02-23 2:37 PM

It's EASY to collect, preserve & access project document files together with the project data!

- Access the Project Documents archive from the Dashboard.
- Accepts various file types including: .docx, .jpeg, .mpp, .pdf, .xlsx, .zip, etc.



The ePX Project Data 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.						
Project Contact Information	Role	Institution	Name	Title	Email	Phone
	Project Administrator or Owner's Rep					
	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					
	Primary Financier/Lending Institution					
Project Identification & Characteristics	Project Identification		Project Measures Check all Included in Project		Project Characteristics	
	Owner's Purchase Order or Task Order #		<input type="checkbox"/> Advanced Metering Systems		List of Sites in Project (separated by commas)	
	Owner's Contract #		<input type="checkbox"/> Appliance/Plug Load Reductions		Number of Buildings in Project	
	Project Name	Information populates ePB via project initiation	<input type="checkbox"/> Boiler Plant Improvements		List of Buildings in Project (separated by commas)	
	Primary Project Location-City	Information populates ePB via project initiation	<input type="checkbox"/> Building Automation Systems/Energy Management Control Systems (EMCS)		Total Floor Area Affected by Project (Square Feet)	
	Primary Project Location-State	Information populates ePB via project initiation	<input type="checkbox"/> Building Envelope Modifications		Average Annual Electrical Energy Consumption of Affected Buildings (kWh/yr)	
	Primary Project Location-Zip code	Information populates ePB via project initiation	<input type="checkbox"/> Chilled Water, Hot Water, and Steam Distribution Systems		Average Annual Electricity Costs for Affected Buildings (\$)	
	Agency Name		<input type="checkbox"/> Chiller Plant Improvements		Average Annual Electric Demand Charges for Affected Buildings (\$/yr)	
	Market Segment	Information populates ePB via project initiation	<input type="checkbox"/> Commissioning		Average Annual Natural Gas Energy Consumption of Affected Buildings (units) [choose from list]	
	Financing Terms		<input type="checkbox"/> Distributed Generation		Average Annual Natural Gas Energy Consumption of Affected Buildings (qty)	
Project Agreement Type		<input type="checkbox"/> Electric Motors and Drives		Average Annual Natural Gas Costs for		

Download the ePX template from the Portfolio page or the Home page.

- The ePX data template is a one-page template that includes all of the information about your project.
- Fields in yellow can be completed by the Project Builder.
- Fields in gray are populated based on information provided when the project was initiated.



Uploading the Data Template

The screenshot shows the ePB web application interface. The top navigation bar includes 'Home', 'Portfolio', 'Analysis & Reporting', 'Project Statistics', 'Applications', 'Help/Documentation', and 'About'. The user's email 'drobson@lbl.gov' is visible in the top right. The left sidebar contains navigation options: 'Dashboard', 'Approve Project', 'Download Data Template', 'Upload Data Template', 'Edit Project Data', 'ePX Summary Archive', 'ePX Project Summary', 'Project Documents', and 'Manage Participants'. The main content area is titled 'New Project Test' and displays project details under four tabs: 'Summary', 'Project Status', 'Performance Period', and 'Ann. Est. Savings'. The 'Summary' tab shows: ePB ID: 4830, City: SAN FRANCISCO, State: CA, Role: Project Initiator/Builder, and Project Type: ePX. The 'Project Status' tab shows a progress bar with 'Pending', 'Pre-Approval', and 'Approved' stages. The 'Performance Period' tab shows 'Years' and the 'Ann. Est. Savings' tab shows '\$'. An 'Upload ePX Data Template' modal is open in the center, containing the text: 'Upload a filled out Excel template file to import your project into the ePB system.' Below this is a warning message: 'Uploading a data template will overwrite all of your existing data.' The modal also displays 'File: ePX_Template-1.1.0-11Dec2023 with data.xlsx' and 'Template Type: ePX'. At the bottom of the modal are two buttons: 'Select a Different File' and 'Upload Selected File', with the latter button circled in red.

To upload the data template, the Project Builder navigates to the saved copy of the template on their computer

- The Project Builder uploads the file
- A prompt will indicate that the file was successfully uploaded
- Once the template has been uploaded you can choose to edit the project data or approve the project
- To approve the project, the Project Builder selects “Approve Project,” which sends an email to the Project Initiator to view and approve the project



ePX Project Summary

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

Portfolio > New Project Test

New Project Test

Summary

ePB ID: 4830
 City: SAN FRANCISCO
 State: CA
 Role: Project Initiator/Builder
 Project Type: ePX

Project Status

Pending Pre-Approval **Approved**

Performance Period

10 Years

Ann. Est. Savings

\$ 50,000

[Download](#)

ePX Project Summary

The **Project Summary** provides a snapshot of data entered for the project. Download or export the summary

PROJECT SUMMARY: New Project Test BASIC PROJECT INFORMATION						
Project Contact Information	Role	Institution	Name	Title	Email	Phone
	Project Facilitator	Owner's Rep	John Smith		JohnSmith@OR.com	(415) 335-1679
	Project Initiator (Customer)	LBL	Dana Robson	Program Manager	drobson@lbl.gov	
	Project Builder (Contractor)	LBL	Dana Robson	Program Manager	drobson@lbl.gov	
	Finance Specialist	Financial Advisor	Jane Doe	Financial Advisor	JaneDoe@FA.com	(650) 967-7180
	Primary Financier	Lending Bank	Louise Smith	Lending Bank	LouiseSmith@bank.com	(415) 425-8614
Project Identification & Characteristics	Project Identification		Project Measures List		Project Characteristics	
	Task/Purchase Order #	12345	<input checked="" type="checkbox"/> Advanced Metering Systems		List of sites	A, B, C
	Owner's Contract #	3355	<input type="checkbox"/> Appliance/Plug load reductions		Number of Buildings	3
	Project Name	New Project Test	<input type="checkbox"/> Boiler Plant Improvements		List of Buildings	1, 2, 3
	Primary Project Location-City	SAN FRANCISCO	<input type="checkbox"/> Building Automation Systems/Energy Management Control Systems		Total Floor Area (sqft)	50,000
	Primary Project Location-State	CA	<input checked="" type="checkbox"/> Building Envelope Modifications		Average Annual Electrical Energy Consumption for Affected Buildings (kWh/yr)	100,000
	Primary Project Location-Zipcode	94131	<input type="checkbox"/> Chilled Water, Hot Water, and Steam Distribution Systems		Average Annual Electricity Costs of Affected Buildings (\$/yr)	\$100,000
	Agency Name	Test Agency	<input type="checkbox"/> Chiller Plant Improvements		Average Annual Electric Demand Charges for Affected Buildings (\$/yr)	\$100,000
Market Segment	University/College	<input type="checkbox"/> Commissioning		Average Annual Natural Gas Energy Consumption of Affected Buildings (units)	MMBtu	
	Financing Terms		<input checked="" type="checkbox"/> Distributed Generation		Average Annual Natural Gas Energy Consumption of Affected Buildings (qty)	100,000
Project Agreement Type	Guaranteed Savings	<input type="checkbox"/> Electric Motors and Drives		Average Annual Natural Gas Costs of Affected Buildings (\$/yr)	\$100,000	
Contract Execution Date (mm/dd/yyyy)	08/12/2020	<input type="checkbox"/> Electrical Peak Shaving/Load Shifting		Other Fuel Type 1 Energy Consumption (Fuel Type)	Heating Oil	
Primary Type of Financing	Loan	<input type="checkbox"/> Energy Cost Reduction Through Rate Adjustments		Other Fuel Type 1 Energy Consumption (Energy Units)	Gal	



ePX Summary Archive

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

Portfolio > New Project Test

New Project Test

Summary

ePB ID: 4830
City: SAN FRANCISCO
State: CA
Role: Project Initiator/Builder
Project Type: ePX

Project Status

Pending Pre-Approval **Approved**

Performance Period

10 Years

Ann. Est. Savings

\$ 50,000

ePX Summary Archive

Action	Approved By	Approve Date
⋮	Dana Robson	2024-08-08 1:37 PM
⋮	Dana Robson	2024-08-13 2:42 PM

Columns

The **Summary Archive** catalogs data each time the project is approved, providing a record of any changes that have been made



Unlocking a Project

The screenshot shows the ePB web application interface. The top navigation bar includes 'Home', 'Portfolio', 'Analysis & Reporting', 'Project Statistics', 'Applications', 'Help/Documentation', and 'About'. The user's email 'drobson@lbl.gov' is visible in the top right. The left sidebar contains several menu items, with 'Unlock Project' highlighted by a red circle. The main content area displays 'New Project Test' with a summary table, a project status flow, and a modal dialog.

Summary	
ePB ID:	4830
City:	SAN FRANCISCO
State:	CA
Role:	Project Initiator/Builder
Project Type:	ePX

Project Status: Pending → Pre-Approval → **Approved**

Performance Period	Ann. Est. Savings
10 Years	\$ 50,000

Unlock Project

Your project is in **Approved** status. Click the **Unlock Project** button to bring your project back to **Pending** status.

[Unlock Project](#)

If you need to make edits to a project in approved status, you can unlock the project

- From the Dashboard, select **Unlock Project**
- An email will be sent to the Project Initiator asking them to unlock the project
- Once the unlock is approved, the Project Builder can edit the data in the UI or upload a new template



Downloading the M&V Data Template

The screenshot shows the ePB web application interface for a project named "New Project Test". The top navigation bar includes "Home", "Portfolio", "Analysis & Reporting", "Project Statistics", "Applications", "Help/Documentation", and "About". The user's email "drobson@lbl.gov" is displayed in the top right corner. The left sidebar contains navigation options: "Dashboard", "Unlock Project", "Download Data Template", "View Project Data", "ePX Summary Archive", "ePX Project Summary", "Project Documents", "Manage Participants", and "M&V".

The main content area displays the "New Project Test" details:

- Summary:** ePB ID: 4830, City: SAN FRANCISCO, State: CA, Role: Project Initiator/Builder, Project Type: ePX.
- Project Status:** Pending, Pre-Approval, Approved.
- Performance Period:** 10 Years.
- Ann. Est. Savings:** \$ 50,000.

The "M&V Summary" section contains the following text: "You can add data for a M&V year by downloading, populating & uploading the Single Year M&V Upload template. Or enter data manually into the user interface screens by clicking '+ Performance Year'." Below this text are four buttons: "+ Performance Year", "Download ePX M&V Template" (circled in red), "Upload ePX M&V Data from Template", and "Cumulative Report".

At the bottom, a table header is visible with columns: "Action", "Performance Year", "Current Year M&V Due Date", "M&V Report Submitted Date", "Project Acceptance Date", "Next Year M&V Due Date", and "Status".

- Once your project is in approved status, the Project Builder can now enter measurement & verification (M&V) data
- Add M&V data by downloading the ePX M&V template or choosing "+Performance Year" to add M&V data manually
 - The downloaded ePX M&V template is unique to your project and cannot be uploaded to a different project



The M&V Data Template

eProjectExpress					
ANNUAL PERFORMANCE PERIOD M&V UPLOAD TEMPLATE					
Project Contact Information	Role	Institution	Name	Email	Phone
	Project Administrator or Owner's Rep	Owner's Rep	John Smith	JohnSmith@OR.com	(415) 335-1679
	Project Initiator (Customer)	LBL	Dana Robson	drobson@lbl.gov	
	Project Builder (ESCO)	LBL	Dana Robson	drobson@lbl.gov	
	ESCO M&V Specialist				
	Other M&V Contact (if applicable)				
	Third Party Verifier (if applicable)				
Project Identification & Key Dates	Project Identification		Verified Project Resource Savings for the Year ³		
	ePB/ePX Project ID#	4830	Electricity Savings Verified for the Year (kWh)		
	Project Name	New Project Test	Electricity Cost Savings Verified for the Year (\$)		
	Key Dates		Electric Demand Cost Savings Verified for the Year (\$)		
	Project Acceptance Date (mm/dd/yyyy)		Natural Gas Savings Verified for the Year (Units)	MMBtu	
	Performance Year* (choose from dropdown)		Natural Gas Savings Verified for the Year (qty)		
	CURRENT M&V Report Due Date (mm/dd/yyyy)		Natural Gas Cost Savings Verified for the Year (\$)		
	CURRENT M&V Report Submitted Date* (mm/dd/yyyy)		Other1 Savings Verified for the Year (type)	Heating Oil	
	CURRENT M&V Report Approved Date (mm/dd/yyyy)		Other1 Savings Verified for the Year (units)	Gal	
	CURRENT Third Party Verification Report Date (if applicable) [mm/dd/yyyy]		Other1 Savings Verified for the Year (qty)		
NEXT YEAR M&V Report Due Date [mm/dd/yyyy]		Other1 Cost Savings Verified for the Year (\$)			
Annual Verified Project-Level Cost Savings	Annual Verified Cost Savings – Project-Level ²		Other2 Savings Verified for the Year (type)	Purchased Steam	
	Verified Project Cost Savings for the Year (\$)		Other2 Savings Verified for the Year (units)	MMBtu	
	Guaranteed Project Cost Savings for the Year (\$)	\$50,000.00	Other2 Savings Verified for the Year (qty)		
		Other2 Cost Savings Verified for the Year (\$)			

The Project Builder completes the M&V template.

- This is a one-page template showing the verified resource savings for your project.
- Select the Performance Year in the dropdown menu.
- Fields shown in red are required fields.



Uploading the M&V Data Template

The screenshot shows the 'New Project Test' interface. On the left is a dark sidebar with navigation options: Dashboard, Unlock Project, Download Data Template, View Project Data, ePX Summary Archive, ePX Project Summary, Project Documents, Manage Participants, and M&V. The main content area has a breadcrumb 'Portfolio > New Project Test' and a progress bar for 'New Project Test' with stages: Summary, Project Status (Pending, Pre-Approval, Approved), Performance Period (10 Years), and Ann. Est. Savings (\$ 50,000). Below this is an 'M&V Summary' section with a blue bar containing instructions: 'You can add data for a M&V year by downloading, populating & uploading the Single Year M&V Upload template. Or enter data manually into the user interface screens by clicking "+ Performance Year".' Below the instructions are five buttons: '+ Performance Year', 'Download ePX M&V Template', 'Upload ePX M&V Data from Template' (circled in red), 'Cumulative Report PDF', and 'Cumulative Report Excel'. Below the buttons is a table with columns: Action, Performance Year, Current Year M&V Due Date, M&V Report Submitted Date, Project Acceptance Date, Next Year M&V Due Date, and Status. The table has one row with '1' in the Performance Year column and '2020-08-12' in the M&V Report Submitted Date column, with a 'Pending' status. A context menu is open over the first row, with options: Edit, Approve M&V Year, M&V Report (circled in red), and Delete. A 'Columns' icon is visible on the right side of the table.

Once your M&V template is completed the Project Builder can upload the template

- A prompt will indicate if the template was uploaded successfully
- View the single-year M&V report by clicking on the three dots to the left of the M&V Year
- The Cumulative Report shows data for all entered M&V Years



Annual and Cumulative M&V Reports

1. Annual M&V Summary

eProject eXpress ANNUAL PERFORMANCE PERIOD M&V FOR YEAR 1					
Project Contact Information	Role	Institution	Name	Email	Phone
	Project Administrator or Owner's Rep	Test			
	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				
	Other M&V Contact				
	Third Party Verifier				
Project Identification & Key Dates	Project Identification		Annual Verified (Expected) Savings - Resource		
	ePB ID#	2008	Electricity Savings Verified for the Year (kWh)	45,000	
	Project Name	ePX Webinar Test Project 2	Electricity Cost Savings Verified for the Year (\$)	300,000	
	Key Dates		Electric Demand Cost Savings Verified for the Year (\$)		
	Project Acceptance Date		Natural Gas Savings Verified for the Year (units)	Therms	
	Performance Year	1	Natural Gas Savings Verified for the Year (qty)	45,000	
	CURRENT M&V Report Due Date		Natural Gas Cost Savings Verified for the Year (\$)	200,000	
	CURRENT M&V Report Submitted Date	8/12/2022	Other1 Savings Verified for the Year (type)		
	CURRENT M&V Report Approved Date		Other1 Savings Verified for the Year (units)		
	CURRENT Third Party Verification Report Date		Other1 Savings Verified for the Year (qty)		
	NEXT YEAR M&V Report Due Date		Other1 Cost Savings Verified for the Year (\$)		
	Annual Verified (Expected) Cost Savings – Project-Level		Other2 Savings Verified for the Year (type)		
	Verified Project Cost Savings for the Year (\$)		Other2 Savings Verified for the Year (units)		
Project Guaranteed Cost Savings for the Year (\$)	\$500,000	Other2 Savings Verified for the Year (qty)			
Cost Savings Shortfall or in Excess of Guaranteed Savings (\$)		Other2 Cost Savings Verified for the Year (\$)			
		Water Savings Verified for the Year (kGal)			

2. Cumulative Results Snapshot

PERFORMANCE PERIOD M&V SUMMARY GUARANTEED AND VERIFIED COST SAVINGS					
Implementation Period (Year 0)	(a)	(b)	(c)	(d)=(c)-(b)	Status
	Estimated Cost Savings	Guaranteed Cost Savings	Verified Cost Savings	Variance in Implementation Period Cost Savings	
Performance Period (Year)	(e)	(f)	(g)	(h)=(g)-(f)	
	Estimated Annual Cost Savings	Guaranteed Annual Cost Savings	Verified Annual Cost Savings	Variance in Annual Cost Savings	
1		\$475,000	\$500,000	\$25,000	Approved
2		\$475,000	\$550,000	\$75,000	Approved
3		\$475,000			
4		\$475,000			
5		\$475,000			
6		\$475,000			
7		\$475,000			
8		\$475,000			
9		\$475,000			
10		\$475,000			
11		\$475,000			
12		\$475,000			
13		\$475,000			
14		\$475,000			
15		\$475,000			
16		\$475,000			
17		\$475,000			
18		\$475,000			
Total Implementation & Performance Period	\$400,000	\$4,000,000			
Implementation & Performance Period to Date ⁴	Total Estimated Cost Savings	Total Guaranteed Cost Savings	Total Verified Cost Savings (To Date)	Total Variance in Cost Savings (To Date)	
	\$400,000	\$4,000,000	\$1,050,000	\$100,000	
IMPORTANT INFORMATION:					
1. Implementation Period (Year 0) Verified Cost Savings information should be completed only if allowed by statute and project owner/customer direction. 2. Negative Variance in Annual Cost Savings indicates that the Verified Annual Cost Savings are less than the Guaranteed Cost Savings. 3. Please note that the Verified Annual Cost Savings for the performance period (and Implementation Period if allowed) may change as the amount may include M&V reports yet to be approved by the project owner (customer).					



Reports on Entire Portfolio – Preset and Custom

Analysis and Reporting

+ New Report

Custom Report Report Library

ePB Fields Only ePX Fields Only

- > Performance Period Expenses & Payments
- > Estimated Savings
- > Project - General
- > M&V
- > Other Fuel & Energy Types
- > Project - Contacts
- > Implementation Price
- > Payments
- > Guaranteed Savings
- > Escalation Rates
- > Pending
- > ePX

The Report Builder allows you to build custom reports on Approved projects. To get started, select at least one field from the left panel or choose a report from the Report Library.

Use the **Report Library** for pre-set reports or build custom reports using only ePX fields



Data Export Feature

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

# of Approved Projects		Total Implementation Price		Total Estimated Annual Savings	
3		\$ 7,125,000		\$ 18,918,600	




Portfolio										
Search for Projects...										
Action	ID	Version	Project Name	Role	Market Segment	Sub-Market	Federal Contract Type	Award/Contract Signing Date	Status	Project Type
⋮	4830	epx	New Project Test	PI-PB	University/College			2020-08-12	Approved	ePX
⋮	3759	3.0	Liz_test_2_accred	PV	K-12 Schools			2018-10-18	Approved	ePB
⋮	4162	3.0	Liz_test_May_30	PB	State/Local Government	Municipality (village, town, city)		2019-10-10	Approved	ePB






Export all of your project data to Excel



Help, Documentation and Training

Help, Documentation and Training

eProject Builder	
 Upcoming Training Webinars	▼
 Data Templates	▼
 Training Documentation	▼
 Key Features and Benefits of ePB	▼
 Training and Informational Videos	▼

eProject eXpress	
 Upcoming Webinars	▼
 Data Templates	▼
 Training Documentation	^
<ul style="list-style-type: none">• eProject eXpress Quick Start Guide• ePX GHG ESIST User Guide• State Rollup Report Guide• eProject eXpress M&V Guide• ePX Sample M&V Template• ePX Fact Sheet• ePX Security Features• Coming Soon:<ul style="list-style-type: none">◦ Analysis & Reporting Guide• Glossary of Terms• FAQ• Disclaimer	
 Key Features and Benefits of ePX	▼
 Training and Informational Videos	▼

The **Help/Documentation** page includes data templates, training documentation, and information on upcoming webinars

Questions? Contact epb-support@lbl.gov