



eProjectBuilder

User Guide: Getting Started with eProject Builder

U.S. DEPARTMENT OF
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Energy Efficiency &
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Purpose of this Guide

This guide covers the necessary information users need to begin using eProject Builder (ePB) (eprojectbuilder.lbl.gov).

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

(Note: ESCOs submitting applications for the DOE Qualified List of ESCOs or NAESCO Accreditation must use a different browser than IE 11 for those functions in ePB).

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

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

Training vs. Main Site

The ePB training site (epb-test.lbl.gov) is the same as the main site but serves to help users learn how ePB works.

- For the training site, users are provided 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 15 below.

The ePB main site (eprojectbuilder.lbl.gov) is where actual projects are entered. The main site requires separate log-in credentials from the training site.



Roles in ePB

Each project in ePB 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 procurement officials or project managers) are responsible for initiating and approving projects.
- **Project Builders or PBs** (typically contractors) 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 ePB if they both initiate the project in ePB system and then designate themselves as the Project Builder. These PI-PBs have both the PI and PB responsibilities as described above.

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

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

- By default, each project can only have one email address associated with the PI account and one address associated with the PB account. An ePB administrator may be able to assign multiple PBs for special cases where multiple users need access.
- The instructions below detail how to get started using the main ePB site (eprojectbuilder.lbl.gov). These instructions assume that the PI is a customer-side procurement official or project manager, and the contractor (e.g., a representative of an ESCO, utility, or other contractor) the PB.
- If you are a project stakeholder who will not be initiating a project or entering project data but needs to have access (e.g., 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).

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 eProject Builder to finish your login process.
2. To change the temporary password after 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 an accordion dropdown 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 enter it correctly.
IMPORTANT! The Project Builder contact must already be registered in ePB (the main site, not the training one) before the customer can assign them to a project as a Project Builder.

4. Once initiated, the project status will show up on the 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 download project schedules or see project data online until the Project Builder submits the data for customer review online. This can potentially represent a long wait, 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. Project Builder logs onto site, 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 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. Project Builder decides whether they wish to primarily enter data for their project using the ePB data template OR by entering data through the data fields of the online system.
9. To enter project data by uploading the ePB Excel data template, the Project Builder downloads the Excel data template from the site (from either the home or Portfolio page).
 - a. For new projects that can use the calculations provided in the template, download the "calculating" template.
 - b. For new projects that cannot use the calculations provided in the template, choose the "non-calculating" template.
 - c. To upload a project that is past contract signing (in construction, performance period or beyond), choose the "non-calculating" template.

NOTE: If the majority, but not all, of the data template's calculations conform to a project, users may use the calculating template and then override values as needed in the online system.

- d. Working offline, the Project Builder completes the data template.
 - i. Fill in yellow fields.
 - ii. Fields with names in red text are required for upload. Other fields are optional (pertains only to the calculating template; the non-calculating template has no required fields).
 - iii. Reference the General eProject Builder User Guide on the Help/Documentation page as needed.
- e. To upload the template for the chosen project:
 - i. Navigate to the Portfolio page.
 - ii. Find your chosen project, and click on the Project Name to navigate to the Project Dashboard.
 - iii. Click "Upload Data Template" link on the left-hand sidebar OR by using the "Upload Data Template" button in the Next Steps box.

10. To enter project data manually through the different online data fields, click the project name on the Portfolio page to navigate to the Project Dashboard.
 - a. Click "Edit Project Data" on the left-hand sidebar.
 - b. Navigate through the different Edit Project Data sections and tabs, keying in project data.
 - c. Complete fields designated as required (outlined in red and designated with red exclamation marks).
 - d. To enter a project in the user interface in non-calculating mode (with no calculations performed and no required fields), click "Calculation Type" on the sidebar and toggle to "non-calculating."
11. Once the project data is uploaded, the Project Builder can output project schedules as html files on the site. The Project Builder can print these schedules if desired.
12. When the Project Builder is ready to submit the project online for Project Initiator approval (at contract award/signing, after negotiations are complete), navigate to the Project Dashboard and click "Submit Project" on the left-hand sidebar or in the Next Steps box. Projects entered in calculating mode, or uploaded using the calculating version of the template, must have all required fields populated before a project can be submitted. If necessary, the Project Builder can complete any missing required fields manually online. Projects in non-calculating mode, including those that use the non-calculating version of the template, do not have any minimum number of fields before they can be submitted.
 - 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

13. Once the Project Builder has submitted a project online, the Project Initiator will receive an automatic email notification that a project awaits approval.
14. To approve the project online and archive the awarded project data to the database, log on to 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.
15. 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.
16. 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.

Project Initiator: Unlocking a Project for Modification

17. If the customer or contractor 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 data template or making changes manually online). 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.

Project Initiator or Project Builder: Adding a Project Viewer

18. After a project has been initiated, the Project Initiator or Project Builder can add another registered user as a Project Viewer.
19. 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.
20. The Project Viewer will be notified via email that they have been assigned as a Project Viewer to the project.