



**eProjectBuilder**

# User Guide: CTS Upload Template

U.S. DEPARTMENT OF  
**ENERGY**

Energy Efficiency &  
Renewable Energy



**BERKELEY LAB**

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## Introduction

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The Compliance Tracking System (CTS) feature in eProject Builder (ePB) enables you to automate the transfer of project data between ePB and CTS. The [CTS system](#) is administered by the U.S. Department of Energy's Federal Energy Management Program (or FEMP) to track Federal agencies progress toward meeting Section 432 of the Energy Independence and Security Act (EISA) of 2007.

This feature reduces the reporting requirement burden for Federal agencies by allowing you to transfer data for all of their approved projects in ePB to CTS by exporting project data from ePB into CTS through an Excel based upload template.

Currently, this feature is capable of streamlining data transfer for the Initiated Project Report and the Project Follow Up Report in CTS. Future versions of the CTS export functionality will be expanded to also enable efficient data transfer for the Annual Investment Report.

Using the CTS feature entails three steps:

1. Download the appropriate CTS upload template, which is populated with their project data, from ePB.
2. Populate several required fields in the upload template, and additional fields as desired.
3. Upload the template into DOE FEMP's CTS system.

## 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 does not work with Excel 2007.

## Eligible Projects

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Projects must meet certain requirements (described below) in order to be compatible with the CTS feature.

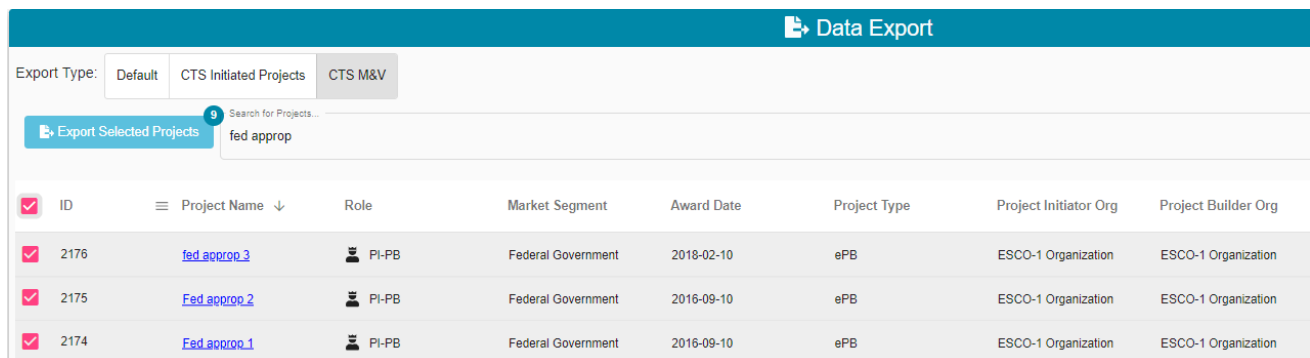
1. Projects must be in **approved** status (meaning that the Project Builder has submitted the project for approval, and the Project Initiator has reviewed and approved the project).

- Projects must be designated as **federal projects** in the “Market Segment” field when the project was first initiated.

## Downloading the CTS Template

- Log in to ePB at [eprojectbuilder.lbl.gov](http://eprojectbuilder.lbl.gov).
- Click the “Portfolio” page at the top of the screen. The Portfolio table displays a list of all projects that you have access to in ePB.
- Click “Data Export” on the left hand sidebar. Choose “CTS Initiated Projects” or “CTS M&V” as the export option. The Data Export will display a filtered view to show the projects that are eligible for the CTS export feature. Note that if you do not have any projects that do not meet the two requirements as described in the beginning of this section, the CTS export options will not appear.
- Choose which projects to include in your CTS data export by clicking the checkbox next to the project. To include all of your eligible projects, click the checkbox on the top row of the table.
- Click the “Export Selected Projects” button. This will download the Excel template, which you can save to your computer.

Figure 1 below shows how to download the CTS template from ePB.



The screenshot shows the 'Data Export' interface in ePB. At the top, there is a teal header with a 'Data Export' button. Below the header, there are three tabs: 'Default', 'CTS Initiated Projects', and 'CTS M&V'. A search bar is present with the text 'Search for Projects...' and a magnifying glass icon. Below the search bar is a button labeled 'Export Selected Projects' and a search input field containing 'fed approp'. The main area displays a table with the following columns: ID, Project Name, Role, Market Segment, Award Date, Project Type, Project Initiator Org, and Project Builder Org. The table contains three rows of data, each with a checked checkbox in the first column.

<input checked="" type="checkbox"/>	ID	Project Name	Role	Market Segment	Award Date	Project Type	Project Initiator Org	Project Builder Org
<input checked="" type="checkbox"/>	2176	<a href="#">fed_approp_3</a>	PI-PB	Federal Government	2018-02-10	ePB	ESCO-1 Organization	ESCO-1 Organization
<input checked="" type="checkbox"/>	2175	<a href="#">Fed_approp_2</a>	PI-PB	Federal Government	2016-09-10	ePB	ESCO-1 Organization	ESCO-1 Organization
<input checked="" type="checkbox"/>	2174	<a href="#">Fed_approp_1</a>	PI-PB	Federal Government	2016-09-10	ePB	ESCO-1 Organization	ESCO-1 Organization

Figure 1. CTS Export

The exported CTS upload template is pre-populated with project data from ePB, and contains four different tabs. Note that the templates for the Initiated Project Report and Project Follow Up Report contain different tabs and fields. The template functionality, and process by which you can transfer data between ePB and CTS, however, is essentially identical.

- Instructions:** This tab contains instructions on how to use the CTS upload template.

2. **Project Upload Template (Initiated Projects Report) OR Follow Up (M&V) Upload Template (Follow Up Report):** This tab contains the project or M&V data populated from ePB Builder that is available. You must augment missing data and edit other data as they see fit. Once this template is complete, upload it into CTS.
3. **Current Projects (Initiated Projects Report) OR Current Follow Up (Follow Up Report):** ePB will not populate this tab. However, if you download the template from CTS, this sheet will populate with all of the current project and M&V data in CTS for each of the facilities assigned to your profile. This sheet can be used as a reference to see what project data is currently recorded in CTS. To update any of these project records that are currently in CTS, you may make appropriate changes, then cut and paste those rows to the "Project Upload Template" sheet.
4. **Data Dictionary:** This tab contains terms and definitions for the fields listed in the other tabs. For any questions on these fields or definitions, email [eeere\\_cts@ee.doe.gov](mailto:eeere_cts@ee.doe.gov).

## Populating the CTS Upload Template: Initiated Projects Report

The Project Upload Template tab is pre-populated with project data from ePB, and contains CTS specific data fields that are not available in ePB.

Field categories available in the Initiated Project template include:

- Covered Facility Identification
- Project Identification
- Project Status
- Project Implementation Cost by Funding Source
- Project Contract Costs
- Project Cost Effectiveness
- Estimated Annual Energy Savings
- Potential Conservation Measures (per Technology Category)

There are four required fields for successful template upload into the CTS system, as listed (and shown in figure 2) below.

1. **Sub-agency Acronym:** this field is pre-populated, but must be modified to the acronym used in CTS for successful template upload.
2. **Agency Designated Covered Facility ID:** this field must be manually entered and correspond to the existing IDs used in CTS for successful template upload.
3. **Project Name:** this field is pre-populated and usually does not need to be modified.
4. **Agency Designated Project ID:** this field is pre-populated and usually does not need to be modified.

Figure 2 below shows the required fields in the Project Upload Template tab.

Covered Facility Identification (Required fields indicated with Red)			Project Identification (Required fields indicated with Red)	
Sub-agency Acronym	Agency Designated Covered Facility ID	Facility Name (reference only)	Project Name	Agency Designated Project ID
Caution: Do not add data to this row				
Agency One			test project 2	2045
Agency One			test project 3	2059

**Figure 2. Required fields in the Project Upload Template tab**

You may enter data for these additional data fields at your discretion. A full list of fields and their definitions are in the Data Dictionary tab.

**Important!** When populating the Project Upload Template tab, DO NOT edit any information above the third row of the spreadsheet. Additionally, do not add any additional columns to the spreadsheet or otherwise modify its configuration.

## Populating the CTS Upload Template: Project Follow Up Report

The Project Follow Up (M&V) Upload Template tab is pre-populated with project M&V data from the ePB M&V module, and also contains CTS specific data fields that are not available in ePB. Each project performance year that has data in ePB will appear as a separate row in the Upload Template.

Field categories available in the Project Follow Up template include:

- Covered Facility Identification
- Project Follow Up Identification
- Measured Annual Energy Savings by Fuel Type
- Measured Annual Energy/Water Savings

There are five required fields for successful template upload into the CTS system, as listed (and shown in figure 3) below.

1. **Sub-agency Acronym:** this field is pre-populated, but must be modified to the acronym used in CTS for successful template upload.
2. **Agency Designated Project ID:** this field is pre-populated and may need to be modified based on what was entered for uploading data in the Initiated Projects Report.

- Follow Up Activity Date:** This field is populated based on information entered in the M&V module, and does not need to be modified.
- M&V Methodology:** This field is populated based on information entered in the M&V module, and does not need to be modified. Note that if difference M&V options have been chosen for different project ECMs, option "M" will be reported.

Figure 3 below shows most of the required fields in the project follow up M&V Upload template,

Project Follow-up Project Identification (Required fields indicated with Red)			
Project Name (reference only)	Agency Designated Project ID	Follow-up Activity Date	M & V Methodology Option
		(yyyy-mm-dd)	(A, B, C, D, M, O)
Test Agency	2178	2020-11-09	Option A

Figure 3. Required fields in the Project Follow Up (M&V) Upload Template

- Measured Annual Energy/water savings by Fuel Type:** This field is populated based on data entered in the M&V module, and is reported at the project level. Data must be entered for at least one savings type field in the "Measured Annual Energy Savings by Fuel Type" or "Measured Annual Energy/Water Savings" categories. This can be energy, water, or renewable savings.

Figure 4 below shows the savings fields available in the template, at least one of which is required for upload.

Measured Annual Energy Savings By Fuel Type (* At least one savings type is required for the Follow-up (M&V) record to be valid)												Measured Annual Energy/Water Savings Water/Renewable (* At least one savings type is required for project to be valid)		
Electricity Savings	Natural Gas Savings	Coal - Anthracite	Coal - Bituminous	Coal - Coke	Distillate Fuel Oil 1	Distillate Fuel Oil 2	Distillate Fuel Oil 4	Distillate Fuel Oil 5	Distillate Fuel Oil 6	Propane	Diesel	Measured Annual Water Saving	Measured Annual Renewable Electricity Output	Measured Annual Renewable Thermal Output
(Kwh)	(Thou. Cu Ft)	(Short Tons)	(Short Tons)	(Short Tons)	(Gallons)	(Gallons)	(Gallons)	(Gallons)	(Gallons)	(Gallons)	(Gallons)	(Thou. Gallons)	(Kwh)	(Million Btu)
32,456												54,368		

Figure 4. Required fields in the Project Follow Up (M&V) Upload Template

You may enter data for additional, optional data fields at their discretion. A full list of fields and their definitions are available in the Data Dictionary tab.

**Important!** When populating the Follow Up (M&V) Upload Template tab, DO NOT edit any information above the third row of the spreadsheet. Additionally, do not add any additional columns to the spreadsheet or otherwise modify its configuration.

## Uploading the Template

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Once the required fields have been completed, and data has been added to the other fields as intended, save the template file in an .xlsx format to your computer.

Login to the FEMP's [Compliance Tracking System](#) and upload the template to complete the project data transfer.