



# eProjectBuilder

Ushering ESPC into the electronic age

U.S. DEPARTMENT OF  
**ENERGY**

Energy Efficiency &  
Renewable Energy





# What is eProject Builder?

- **eProject Builder ("ePB") is a FREE web-based system for entering and tracking ESPC data for the life of the contract**
- **ePB has been developed and will be maintained by Lawrence Berkeley National Lab (LBNL) for U.S. DOE**
- **The initial version (1.0) was developed primarily for federal ESPC projects; has now been modified to accommodate state and local projects**
- **ePB enables energy service companies (ESCOs) and their customers to securely:**
  - **upload** and **track** project-level information;
  - **generate** project data for analysis and reporting
  - **benchmark** new projects against historical project performance data.



# **Your Project Data is Valuable!**

- **ESPC data can be gold mine for both agencies and ESCOs**
- **Key to measuring project and program performance**
- **Critical for reporting up the chain, down the chain – and out to stakeholders and the public**
- **Invaluable for telling your (agency or ESCO) ESPC success story, educating your audiences, and overcoming skepticism**



# ePB: Optimizing your Data's Value

- 1. Consistency** – key to making your data useful
  - Consistent data collection processes
  - Standardized data types and format = strong database
- 2. Ready access** – for getting your story out
  - Internet-based
- 3. Simplicity** – user-friendly tool
- 4. Institutionalization** – critical for maximizing/  
retaining value over time



# ePB Benefits

- **Secure centralized online database** with varying permission levels as customer deems appropriate
- **Standardized** data collection across ESCOs and across markets (federal, state, local, schools, etc.)
- **Ready access** to data for portfolio of projects for analysis and reporting ESPC success stories
- **Reduced** ESPC transaction costs
- **Improved** customer confidence through transparent calculations (via Excel-based “data template”) and third-party standardization



# ePB Components and Access

**The ePB system is comprised of two key components:**

- 1. Excel-based data template** that the ESCO uses to input project data, develop project scenarios, and upload data to the online database
- 2. Online system** where project data is uploaded, accessed and tracked

## **Access:**

- 1. Two-step log-in** similar to other high-security sites
- 2. By default** each project is accessible online by only one ESCO and one customer account
- 3. ESCOs and customers** can expand access by adding individual "Project Viewers" to the project



# ePB roles

## Customer "Project Initiator"



- Registers (individually, NOT by organization) and initiates project
- Invites ESCO rep. (Project Builder)
- Reviews project data with ESCO
- Approves project
- Unlocks project for revision, if necessary
- Invites Project Viewer(s)

## ESCO "Project Builder"



- Registers (individually, NOT by company)
- Enters project data
- Reviews project data with customer
- Submits project for approval
- Revises project data, if necessary
- Invites Project Viewers

## "Project Viewer"



- Registers
- Views project information, only when invited



# ePB software requirements

- **Browser requirements:**
  - **Mozilla Firefox 10.0.7 or higher**
  - **Google Chrome 30 or higher**
  - **Safari**
  - **Internet Explorer 11 or higher**
- **Software requirements:**
  - **Microsoft Excel 14.0 (2010 on Windows, 2011 on Mac) or later**



# ePB FAQs

- **Who can use ePB?** Any customer and ESCO pair that would like to use ePB to help facilitate and track ESPC projects is welcome to use the system. In addition, any member of the public may access aggregate statistics from historical ESPC projects on the ePB benchmarking page.
- **Am I required to use ePB?** Federal agencies have been directed to use it and the eProject Builder schedules will replace current financial schedules under the new FEMP IDIQ ESPC contract. In other sectors ESCOs may at some point be required by their customers to use ePB (some states are beginning to require ePB).
- **Can I use ePB for non-ESPC projects?** ePB can host most federal and non-federal (e.g., state and local government) ESPC projects. In the future ePB may be able to accommodate other types of energy projects (e.g., UESC).
- **Who will be able to see my project information?** Generally, only the authorized ESCO and customer personnel may view individual project data. However, ESCOs and customers may invite other project viewers at their discretion, following project approval in ePB. A few selected federal agency and national lab staff will have the ability to view federal government projects, as is current practice.
- **Can a customer modify the data entered by an ESCO? No.** ESCOs are the only ePB user able to modify project data in the online system. However, if modifications are necessary, the customer “unlocks” the project so ESCOs can modify. ESCOs are encouraged to iterate project scenarios with their customers using the data template.



# Excel-based Data Template

## SUMMARY SCHEDULE BASIC PROJECT INFORMATION

SUMMARY SCHEDULE BASIC PROJECT INFORMATION					
Project Contact Information	Role:	Institution:	Name:	Email:	Phone:
	Project Facilitator, if applicable				
	Customer (Project Initiator)				
	ESCO (Project Builder)				
	Finance Specialist				
Primary Financier					
Project Identification & Characteristics	Project Identification:		Project Characteristics:		
	Task Order #, if applicable		List of Sites in Project (separated by commas):		
	Contract #		Number of Buildings in Project:		
	Project Name:		List of Buildings in Project (separated by commas):		
	Primary Project Location-City:		Market Segment:		
	Primary Project Location-State:		Total Floor Area Affected by project (Square Feet):		
	Primary Project Location-Zipcode:		Average Annual Energy Consumption of Affected Buildings (MMBtu/yr):		
	Agency Name (optional):		Implementation Period (months):		
	Project Initiator (Customer)				
	ESCO Name (Project Builder)				
Costs & Financials	Financing Terms:		Project Capitalization:		
	Applicable Financial Index:		Total Implementation Price (from Schedule-2 Total):	\$0	
	Contract Term (years):	0	PLUS Financing Procurement Price-capitalized construction period interest (\$):		
	Index Rate:		PLUS Financing Procurement Price-other expenses (\$):		
	Added Premium (adjusted for tax incentives):		LESS Implementation Period Payments (from Schedule-1, (c)):	\$0	
	Project Interest Rate:	0.00%	Total Amount Financed (Principal):	\$0	
	Financing Issue Date (mm/dd/yyyy):		Performance Bond Amount:		
	Source (Financier):		Annual Dollar Savings Retained by Customer:		
	Effective Through (mm/dd/yyyy):				
	Primary Type of Financing (choose from list):				
Project Agreement Type (choose from list):					
Payment Timing (beginning or end of performance year):					
Other Information	Guarantee % of Estimated Savings:				
	Federal Contract Type:				
	Primary Electric Utility:				
	Primary Natural Gas Utility:				
	Primary Water Utility:				

## SCHEDULE #1 COST SAVINGS AND PAYMENTS

Implementation Period:	(a)	(b)	(c)
	Estimated Cost Savings	Guaranteed Cost Savings	Payments
Performance Period (Year):	(d)	(e)	(f)
	Estimated Annual Cost Savings	Guaranteed Annual Cost Savings	Annual Payments
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			
21			
22			
23			
24			
25			
<b>Total Performance Period:</b>	\$0	\$0	\$0
<b>Total Implementation &amp; Performance Period</b>		<b>Total Guaranteed Cost Savings (b+e)</b>	<b>Total Payments (c+f)</b>
		\$0	\$0



# Online System

Benchmarking

Help/Documentation

About



## eProjectBuilder

eProject Builder enables Energy Services Companies (ESCOs) and their contracting agencies to:

1. upload and track project-level information
2. generate basic project reports required by local, state, and/or federal agencies
3. benchmark new Energy Savings Performance Contract (ESPC) projects against historical data

[Learn more](#)

Please sign in

Email:

Password: [Forgot password?](#)

[Sign in](#)

New to ePB? [Request an Account](#)



# Projects Summary Page

[Home](#)[Projects Summary](#)[Benchmarking](#)[Help/Documentation](#)[About](#)

Liz Test Customer ▾

[+ Enter New Project](#)[Download Project Template](#)[Download All Projects in Table as .csv](#)

- To **view** project data online, click the project name.
- To **download** a draft output schedule for pre-approved or approved projects, click the gear icon and the "download schedule" link.
- To **manage** names of who can view the project, click the gear icon and the "manage viewers" link.

Search: 

Project ID	Project Name	Market	Agency	Award Date	Last Modified	Customer	ESCO	Total Implementation Cost	Total Guaranteed Savings	Proposal Status	M&V Status	Data % Complete	Actions
52204	<a href="#">Nov 19 demo project</a>	Federal Government	State		2015-11-19 19:48:48	test Customer Organization	ESCO Company name	\$7,082,480	\$8,689,789	Pending		100%	
<a href="#">52205</a>	<a href="#">LBNL test project 3</a>	Federal Government	Office of Science		2015-11-25 16:36:59	Berkeley Lab	ESCO of the West	\$3,562,480	\$5,006,332	Pre-Approval		100%	
<a href="#">52203</a>	<a href="#">Demo project November</a>	Federal Government	State		2015-11-30 20:35:11	Demo Customer	Demo ESCO	\$5,882,480	\$7,378,885	Approved	Pending	100%	
<a href="#">52213</a>	<a href="#">December Test Project II</a>	K-12 Schools	Office of Science		2015-11-30 20:14:19	LBNL	Demo ESCO	\$7,682,480	\$10,088,917	Approved	Pending	100%	
52212	Dec 1 demo	K-12 Schools			2015-11-30 18:07:23			\$0	\$0	Pending		0%	

Showing 1 to 5 of 5 entries

← Previous **1** Next →



# Project Dashboard



← [Project Summary](#)

## Demo project November

Location: **Berkeley, CA**  
Customer: **Demo Customer**  
ESCO: **Demo ESCO**  
Award Date:  
Implementation Cost: **\$5,882,480**  
Your Role: **Project Initiator**

### Action Menu

- [View Project Details](#)
- [Edit M&V Data](#)
- [View Project Financial Schedules \(html\)](#)
- [View Project Financial Schedules \(.pdf\)](#)
- [Manage Project Participants](#)
- [Download blank data template](#)

### Project Status

Your approved project has one or more M&V years in pending status available for the ESCO to submit.

[View / Approve M&V Data](#)

### Project Financial Schedules Archive

- Nov 25, 2015 04:50:04 pm PST
- Nov 25, 2015 04:39:49 pm PST

### Documents

File Name	Date Uploaded	File Size
<a href="#">ePB Project Contact List.docx</a>	11/30/2015 6:15:34 pm PST	11.10 KB
<a href="#">ePB Test Upload Document.docx</a>	11/30/2015 6:17:04 pm PST	11.10 KB
Total Disk Usage		22.20 KB

[Upload a Document](#)



# ePB Workflow

## Typical project entry workflow:

- **Customer and ESCO register for ePB accounts**
- **Customer initiates project online; provides ESCO contact email**
- **System automatically notifies ESCO that the new project is available**
- **ESCO downloads data template from ePB site**
- **ESCO inputs project data into template and uploads completed version to on-line site; ESCO may generate pdf schedules for dropping into project proposals**
- **When project is at award stage, ESCO submits for customer approval**
- **Customer reviews project data via output schedule; if project data is deemed final, customer approves project and it's archived in ePB**
- **Customer has the ability to "unlock" project for revisions (e.g., mods)**
- **ESCO adds M&V data; customer reviews & approves M&V data**



# M&V Summary Page



[◀ Project Dashboard](#)

## M&V Summary

Demo project November

[Download All M&V in Table as .csv](#)

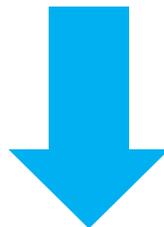
Performance Year	M&V Report Due Date	M&V Report Submitted Date	M&V Report Approved Date	Status	Actions
0 (Post-installation verification)		2015-11-23		Approved	
1		2015-11-30		Pre-Approval	
2				Pending	



# How do I access ePB?

Explore ePB on the training site:

<https://epb-test.lbl.gov>



Enter projects into eProject Builder main site  
(requires separate credentials):

<https://eprojectbuilder.lbl.gov>



# Getting Started

- **Customer and ESCO teams register**
- **Customer initiates projects (takes less than a minute)**
- **ESCO uploads data using template**
- **Ask LBNL to help you:**
  - Register groups/teams of people
  - Upload your project data



## **CONTACT US:**

**Email: [epb-support@lbl.gov](mailto:epb-support@lbl.gov)**

**Phone: (510) 486-7442**

