ATTACHMENT J-24
eProject Builder System Instructions

J-24.1 Introduction

eProject Builder (ePB) is a secure online data collection system for ESPC projects. It is offered through a web- based tool managed on behalf of the U.S. Department of Energy by the University of California / Lawrence Berkeley National Laboratory (LBNL). This system is subject to the protections, requirements, limitations, and exemptions of 10 C.F.R. § 1004.3(e)(2) and the Freedom of Information Act, 5 U.S.C. § 552. The ePB system includes ESPC project data for State, local, and federal agencies. It provides a standardized format for collecting and reporting ESPC project data. ePB enables Energy Service Companies (ESCOs) and their contracting agencies or other entities to:

  A. Upload and track project-level information;

  B. Generate basic project reporting materials (e.g. task order schedules) that may be mandated by local, state, and/or federal agency requirements; and

  C. Benchmark proposed Energy Savings Performance Contract (ESPC) projects against aggregate statistics from a database of historical project data.

Authorized users of ePB include local, state, and federal government agencies, private companies and their authorized staff, as well as other organizations authorized by these government agencies and/or private companies and their authorized staff. ePB users deliver and/or access project-level information only for those projects for which they are authorized. Project-level information delivered and/or accessed by ePB users is described on the eProject Builder system website, https://eprojectbuilder.lbl.gov/, and amended from time to time.

J-24.2 General Process for Entering Project Information to ePB

Customers (i.e., ordering agencies) will initiate a project through the ePB system and invite an individual ESCO contact to "build" the project. After being invited to use the system and registering, the "project builder" (i.e., the ESCO) will be able to enter project information. After the project information has been entered, the ESCO will have the ability to generate draft schedules and submit the project information for customer (i.e., "project initiator") approval. Customer approval commits the project to the ePB system database and "project viewers", outside parties invited by the ESCO or customer agency or other authorized users, will have the ability to view, but not edit, the project information. Customer agencies have the ability to unlock a project for modification and re-submittal by the ESCO. The entering of project data and customer approval is similar for project financial and energy savings data that defines the project upon award, and subsequently during the post-installation and annual measurement and verification.

J-24.3 Requirements for Contractor

All required project-level information is described on the ePB website. The contractor will collect and report project-level information to the ePB system at the following times for projects under the DOE ESPC IDIQ contract:

  A. Draft schedules shall be incorporated into the Preliminary Assessment (PA) for submittal. Inclusion of the cancelation ceiling schedule is optional, or as specified by the ordering agency in Task Order Request for Proposal.

  B. Schedules for the Draft Investment Grade Audit/Proposal shall be incorporated, when requested by the ordering agency.

C. Complete schedules for the Final IGA/Proposal, once final negotiations are complete, shall be generated and incorporated into the Final IGA/Proposal, as referenced in Attachment J-4. These schedules will match what will be incorporated into the Task Order. The contractor shall submit the project for approval through ePB so the ordering agency can review and approve the schedules before Task Order Award to ensure there is agreement with the Final IGA/Proposal.

D. Post-Installation M&V data shall be entered into ePB for the performance year of zero (0). The post- installation M&V schedule report within ePB shall be generated and incorporated into the Post-Installation Report, as referenced in Attachment J-4. Upon finalizing the post-installation report, the contractor shall submit the post-installation M&V data for approval through ePB so the ordering agency can review and approve the data.

E. Annual M&V data shall be entered annually into ePB for the performance year of one (1) through the end of the Task Order. The annual M&V schedule report within ePB shall be generated and incorporated into the Annual M&V Report on ECM Performance, as referenced in Attachment J-4. Upon finalizing the post- installation report, the contractor shall submit the post-installation M&V data for approval through ePB so the ordering agency can review and approve the data.

F. Complete ePB schedules for a contract modification (if applicable)

J-24.4 ePB Support, Training Videos, and Documentation

Please visit the following location for complete instructions, documentation, and training videos on how to upload project information and use the ePB system:

https://eprojectbuilder.lbl.gov/home/#/help

The following documentation and training are available at the ePB website and amended from time-to-time.

- **System Requirements**
- **Data Templates and User Guide**
- **Training Documentation**
- **Key Features and Benefits of ePB**

- **Training Videos**
  - Full on-demand demonstration and training webinar (1 hour)

  - *Introductory Chapters (All Users)*
    1. Overview video
    2. Registration and log-in
    3. Benchmarking against historic project data
    4. Viewing your projects summary, project dashboard, M&V module and uploading documents, and viewing project financial schedules (.html or .pdf)
    5. Download project data into spreadsheet (.csv)
    6. Changing your password and logging out

  - *Customers (Project Initiators)*
    7. Initiating a new project
    8. Viewing projects summary
    9. Viewing the project dashboard and uploading documents
    10. Outputting project financial schedules (view online or download as pdf)
    11. Approving a project submitted by the ESCO
    12. Unlocking a project for ESCO revision
    13. Viewing and approving M&V data
    14. Adding Project Viewers

- *ESCOs (Project Builders)*
    15. Viewing your projects summary and dashboard
    16. Downloading the data template
    17. Completing the data template
    18. Uploading the project data template via the Projects Summary Page
    19. Uploading the project data template via the Project Dashboard
    20. Outputting project financial schedules (view online or download as pdf)
    21. Editing project data and submitting to customer for approval
    22. Entering and submitting M&V data
    23. Adding Project Viewers

- *Project Viewers*
    24. Viewing your projects summary and dashboard
    25. Viewing project financial schedules

[END OF ATTACHMENT J-24]