eProject Builder and UESCs

Elizabeth Stuart, Lawrence Berkeley Lab

Hosted by:

FEDERAL UTILITY PARTNERSHIP WORKING GROUP SEMINAR

May 2-3, 2019
San Diego, CA
eProject Builder (ePB) Overview

• Secure, web-based project tracking/reporting system
• Free tool maintained by Berkeley Lab for U.S. DOE
• ePB enables agencies and utilities to securely:
  – Preserve and track UESC project information, performance assurance information, and related documents in perpetuity
  – Develop project scenarios using standardized calculations
  – Generate data and reports
• Status: contains ~780 projects; 60% fed, including 18 UESCs
The Power of Data Management

- Institutionalizes ability to report program & project impacts; enables you to be *audit-ready*
- Demonstrates the *value* of projects and programs
- Enables fulfilment of reporting requirements
- Identifies where work has been completed and where remaining potential exists
- Identifies savings achieved year over year
- Illustrates that benefits are being achieved in similar projects (by folks just like you)
ePB Benefits

- Enables UESC teams to leverage the power of data management
- Preserves your critical project data through the contract term and beyond
- Standardizes the types of data collected and reported for UESC projects – very important
- Enables tracking persistence of realized savings year over year
- Enables analysis and reporting of project / program performance; enables you to tell your success stories!
- Empowers UESC teams by providing them direct access to data for their portfolio of projects
- Forthcoming: Enables transfer of data from ePB to CTS (pilot underway)
ePB Components and Security

• **Two Key System Components**
  – Excel-based data template for utility/contractor to enter data and develop project scenarios
  – Online system where data & documents are uploaded, accessed & tracked

• **Security Features**
  – Encrypted (https) and 2-step log-in similar to other secure sites
  – Project access restricted to one customer and one utility account
  – Zero cyber security risk score via 2 levels of security testing/remediation
    • National Lab IT security scans and other processes
    • 3rd-party scans from government cyber security expert
ePB User Roles

**Customer** “Project Initiator”
- Registers
- Initiates project (takes less than 1 minute)
- Reviews project data
- Approves submitted project
- Unlocks project for revision, if necessary
- Invites Project Viewer(s)

**Utility** “Project Builder”
- Registers
- Enters project data
- Reviews project data with customer
- Submits project for approval
- Revises project data, if necessary
- Invites Project Viewer(s)

**Other Stakeholder** “Project Viewer”
- Registers
- Views project information, only when invited
ePB Outputs

- Project financial/savings schedules
- Annual and cumulative performance verification reports
- Start with library canned queries or create your own
- Tables and graphs with analysis on portfolio of projects
Registration and Log In

eProjectBuilder

ePB enables energy service companies (ESCOs) and their customers to securely:

1. Upload, track and access ESPC project-level information for the life of the performance contract
2. Quickly generate data for project and portfolio reports
3. Develop project scenarios using standardized amortization calculations
4. Benchmark new ESPC projects against historical project data

Learn more
Register for account on main site, training site or both: [https://eprojectbuilder.lbl.gov/](https://eprojectbuilder.lbl.gov/)

2nd email is required for training site; user receives both ESCO and customer type roles to explore complete project entry and approval cycle.
# Projects Summary Page - View Portfolio

![Projects Summary Page](image)

<table>
<thead>
<tr>
<th>Project ID</th>
<th>Project Name</th>
<th>Market</th>
<th>Agency</th>
<th>Award Date</th>
<th>Last Modified</th>
<th>Customer</th>
<th>ESCO</th>
<th>Total Implementation Cost</th>
<th>Total Guaranteed Savings</th>
<th>Proposal Status</th>
<th>M&amp;V Status</th>
<th>Data % Complete</th>
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</tr>
</tbody>
</table>

Showing 1 to 5 of 5 entries

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If you have questions, issues or feedback on eProject Builder please email: epb-support@lbl.gov

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Federal Utility Partnership Working Group
May 2-3, 2019   San Diego, CA
Project Dashboard

Federal Utility Partnership Working Group
May 2-3, 2019    San Diego, CA
Excel-based data template for utility and agency to:
1) Develop project scenarios
2) Enter project data for uploading to the online system

There are two different template versions:
1) **Default**: automates calculations of payment and savings schedules
2) **Override**: manual entry of all data
• Berkeley Lab is enlisting your input today on a Beta version of a new ePB data template
  – Current USEC projects in ePB have had to use workarounds
  – New version will fully align with UESC project structure
Agency initiates project in ePB at start of Step 3. Utility can develop scenarios w/ePB template
Q&A

• Challenges around preserving and accessing UESC project information, e.g., for:
  – Reporting, tracking what has been implemented, sharing success stories
• Challenges around tracking performance assurance
• Training materials that will be most useful
• Other questions
Thank you!

• Website: eprojectbuilder.lbl.gov

• Introductory training webinars (all project types)
  – 2nd Thursday and 4th Tuesday of every month in 2019 @ 1:00 eastern
  – See the ePB Help/Documentation page for upcoming webinars:
    https://eprojectbuilder.lbl.gov/home/#/help

• Technical support: epb-support@lbl.gov

• Contact: Elizabeth (Liz) Stuart: estuart@lbl.gov