eXCHANGE User Manual
Registering as a User of eXCHANGE
Funding Opportunity Announcement Website
"Engaging Energy Innovation"

Energy Efficiency and Renewable Energy
Department of Energy

Updated September 2012

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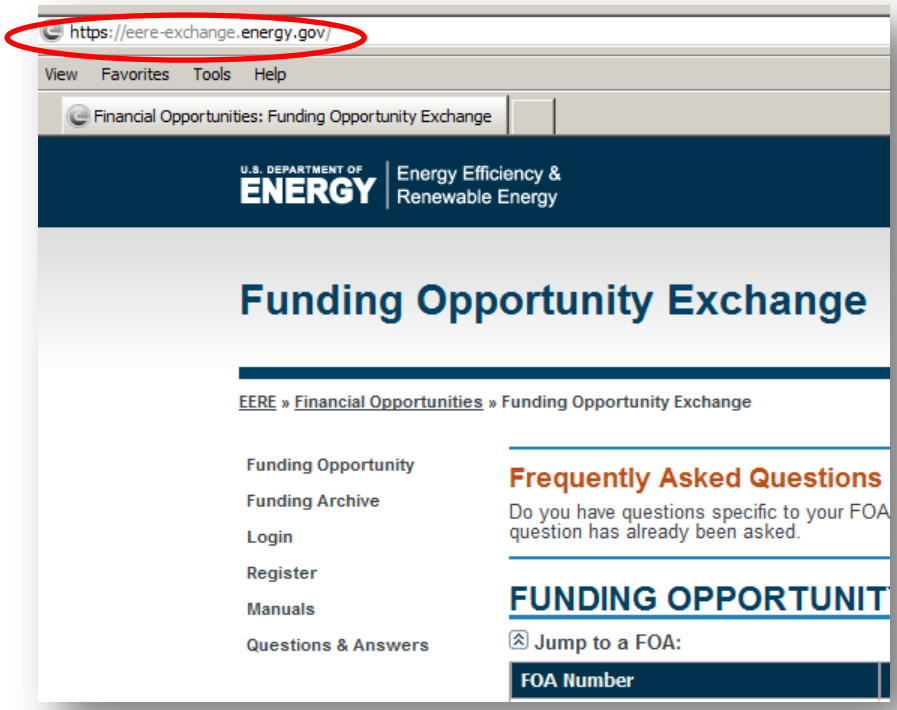
Introduction

All participants in the FOA creation, review and management process can self-register in eXCHANGE. Such participants can include: applicants, merit reviewers (federal and non-federal employees), and DOE federal and contract employees. The contents of this guide will provide a step by step overview of the registration process.

To begin the registration process use the following web address to access EERE Funding eXCHANGE:

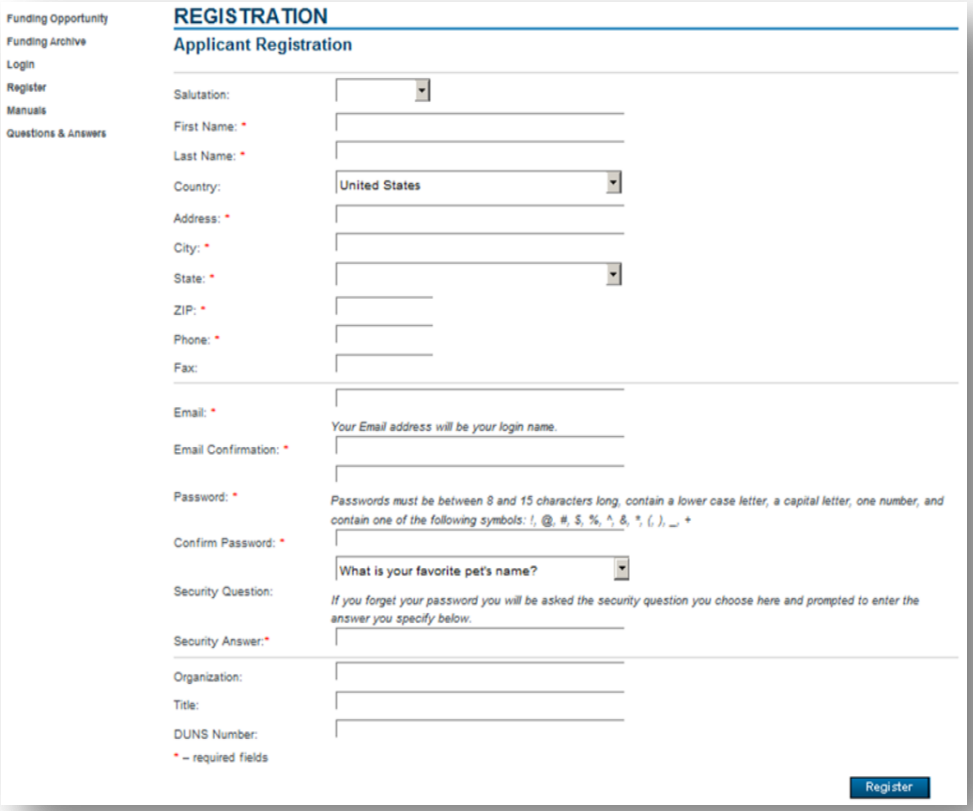
https://eere-exchange.energy.gov/



Register as an Applicant

An applicant is defined as any individual who would like to apply for an EERE funding opportunity. To register as an Applicant, click the Register Tab on the left navigation menu from the landing page. Once on the landing page, click the 'Applicant' button. This will direct the applicant to the registration page to complete the necessary information.

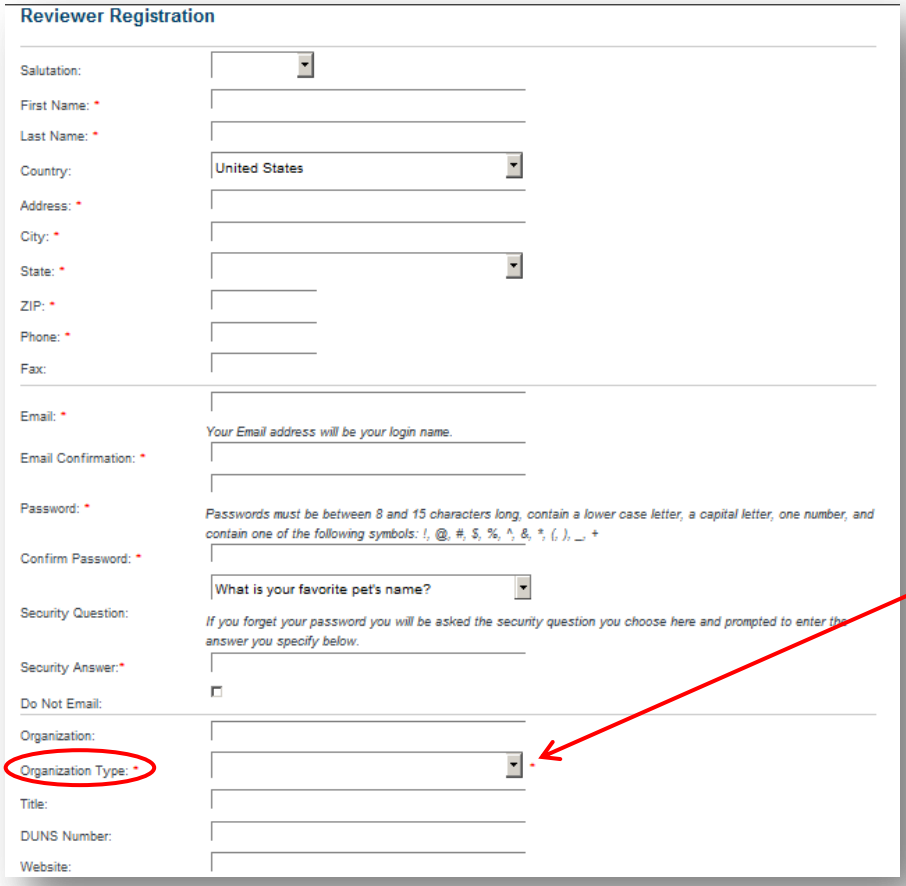
Complete the required fields denoted with a red asterisk next to the title of the field. Click the 'register' button at the bottom of the page once all the required information is filled in. Once registered click the 'Funding Opportunity' link and choose the FOA for which you intend to apply. Note that once registered and logged into the system, an applicant can edit their personal information.



Register as a Reviewer

Reviewers are subject matter experts that would like to be considered to review incoming funding applications. To register as a Reviewer, click the 'Reviewer' button on the registration landing page.

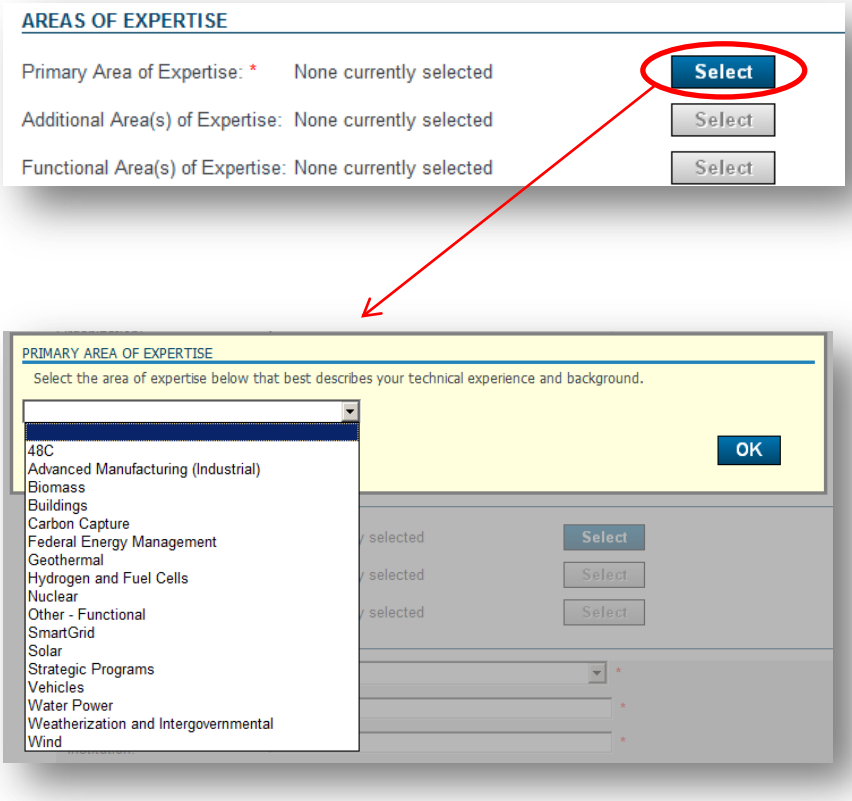
On the Reviewer registration page, the individual will be required to provide the same personal information, email and security question as the applicant. After completing the personal and security information, key details such as organization, education/experience, citizenship, area(s) of expertise and a resume must be provided in order to register as a reviewer.



Organization Type: Reviewers will need to provide the type of organization where currently employed by choosing an item from the drop down menu. Reviewers should choose the item which most closely aligns to their current employer. The options include: National Lab, Non-DOE FFRDC, Academic, Government, Industry, Other, and Independent Consultant.

Areas of Expertise

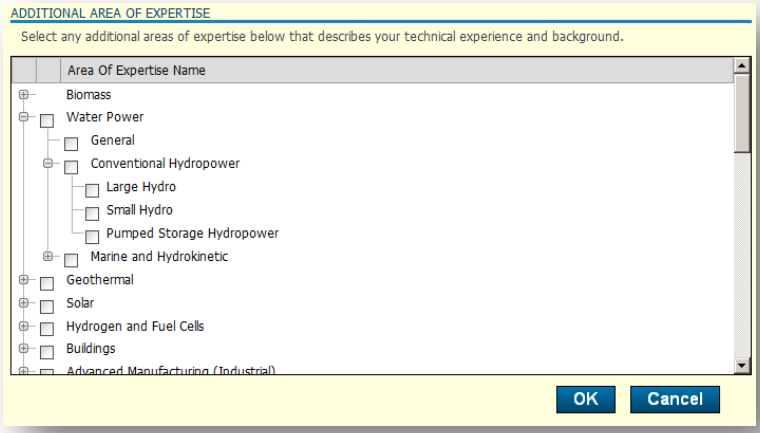
Reviewers are expected to align themselves with at least one area of expertise for which they are considered a subject matter expert.



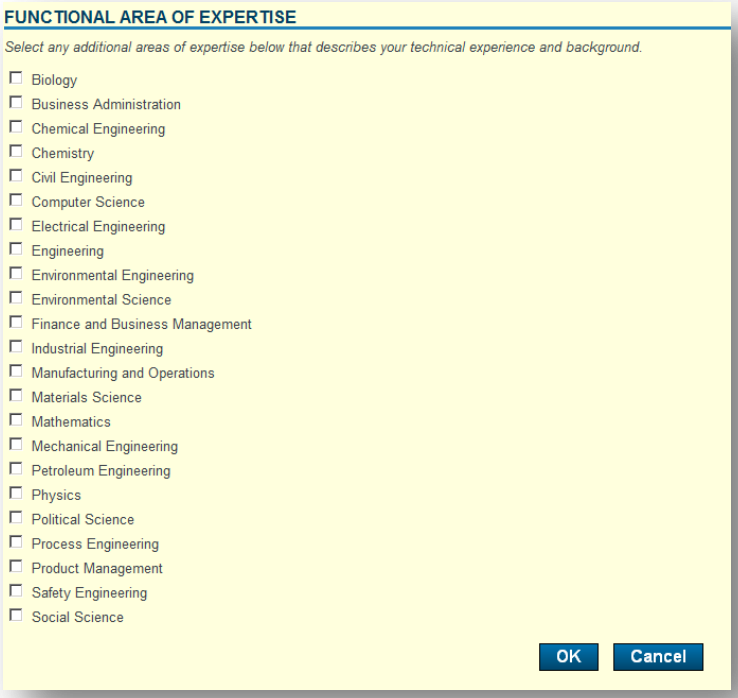
Areas of Expertise: The areas of expertise choices align with the Department of Energy's Office of Energy Efficiency and Renewable Energy program initiatives and sub categories for which solicitation and funding opportunities are categorized.

Primary Area of Expertise: At least one primary area must be chosen. This area should align with the reviewer's expertise. Additional areas can be provided.

Note: If a reviewer does not have a program specific area of expertise but more cross functional, they should choose the 'Other-Functional' option.



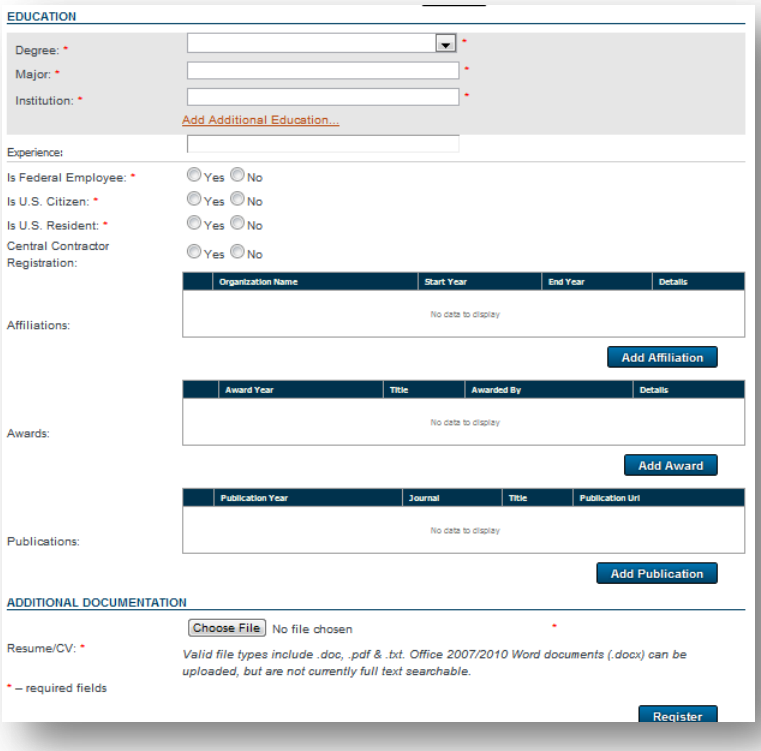
Additional Areas of Expertise: While only one primary area of expertise is required, some reviewers have other areas of subject matter expertise. The additional areas of expertise allow reviewers to self-elect additional expertise and further subcategorize themselves for specific reviews.



Functional Areas of Expertise: Functional areas of expertise are cross-cutting areas of expertise which may be relevant to numerous solicitations and across program areas. Reviewers may choose all areas that apply to their area of expertise.

Additional Reviewer Information

Reviewers will be required to illustrate they are qualified to be subject matter expert reviewers for soliciations and funding opportunities. To prove their expertise, reviewers will need to provide educational and career experience by providing the required information noted below. After registering, senior management will be notified for approval, once the decision is made, approval or denial, the system administrator and or program employee will contact you with further instructions.



Education: Reviewers are required to provide at least one degree, major and institution. Additional degrees can be added by clicking on the 'Add Additional Education' link at the bottom of the section.

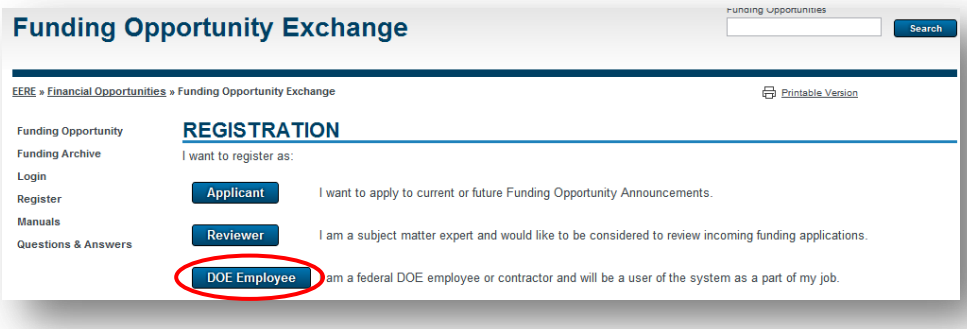
Experience: Brief overview of your expertise

Additional Information: Reviewers will need to answer the yes or no questions with red asterisks that denote required responses. Additional information can be entered for affiliations, awards and publications. While these fields are not required, the input will be helpful for program employees to search and assign expert reviewers for future review needs.

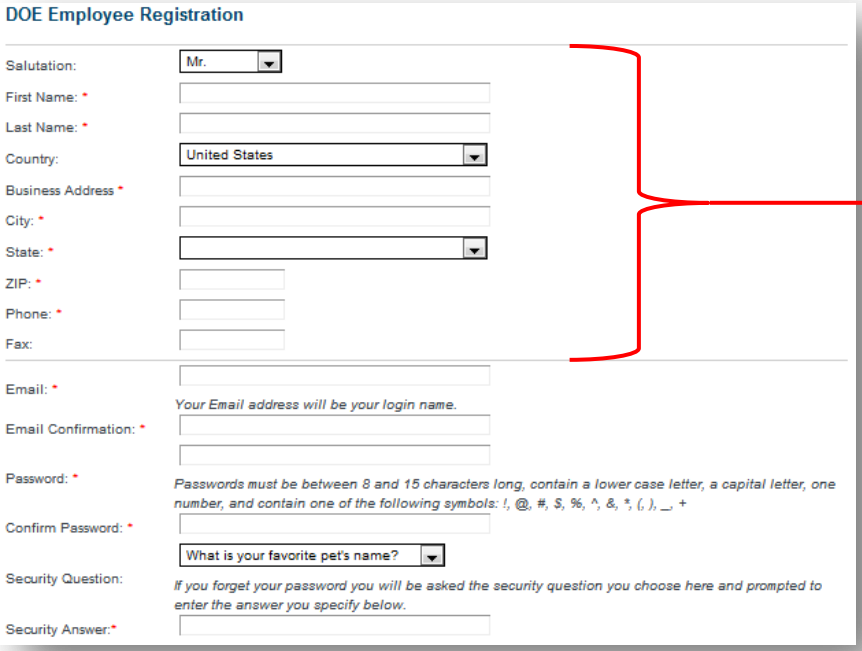
Documentation: All reviewers will be required to provide, via downloadable document, at least a resume to be considered subject matter expert reviewers and register in eXCHANGE.

Register as a DOE Employee

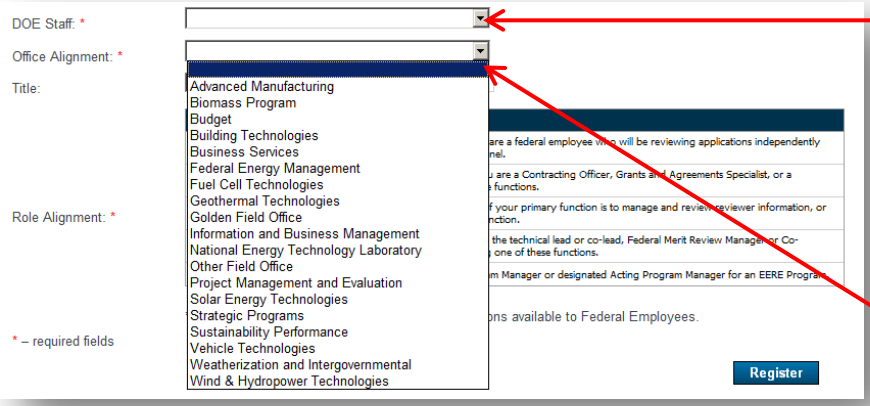
DOE employees are federal employees or contractors that use the system as part of their job. To register as a DOE Employee, click the 'DOE Employee' button on the registration landing page.



On the 'DOE Employee' registration page, mandatory informational will be needed about the employment, office alignment, title and role alignment. Click the 'Register' button at the bottom of the page upon completion.

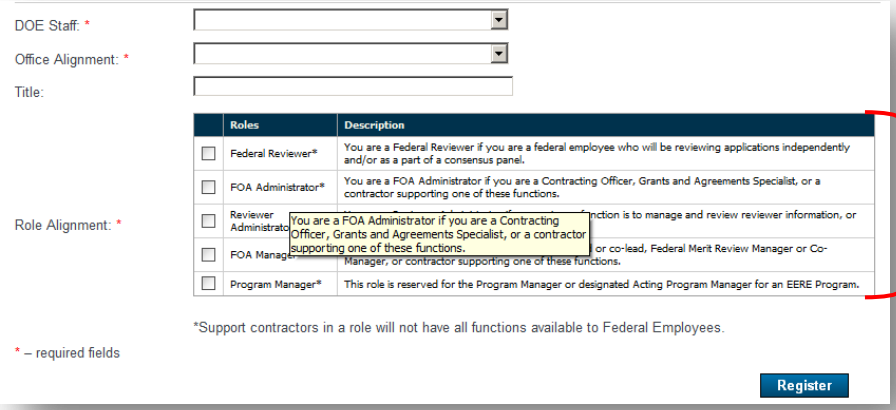


Employees will be required to provide business contact, email and security information prior to registration.



DOE Staff: Users will need to identify, from the drop down menu, their staff affiliation with the DOE, either Federal or Contractor.

Office Alignment: The dropdown menu provides options for employees to self-identify their office/lab or program affiliation.



Role Alignment: As eXCHANGE is a role based system, new users will need to register for a specific role. A description is provided for employees to better determine their primary use of the system. Note users can have multiple roles in the system and will need to have approval for all roles.

Becoming a System User and Role Selection

Once registered in the system, all EERE employees and contractors must contact an EERE System administrator to be granted user rights. The preferred method of contact is a brief email.