

## Getting started with Energy Information RFP?

Many large public organizations need a comprehensive energy information system but have trouble getting the procurement process started. You can freely use the following utility bill tracking and energy accounting functional specification as the basis for a Request for Proposal or Request for Quote.

### BILL TRACKING Requirements

- Track any type of utility bill (any commodity, energy or non-energy)
- Track any level of bill details (taxes, various charges, KW demand)
- Bill entry screen layout looks like actual bill
- Bill entry screen shows past history with tables and graphs
- "Fat finger" tests to catch obvious keying errors, user-defined sensitivity
- Provisions for complex unbundled/deregulated accounts with multiple vendors, show average unit cost for LDC/supplier/tax portions of bills
- Rate schedules can recreate and verify accuracy of bills, wizard to easily create simple to complex rate schedules
- Bill audits to spot potential problems
- User-defined work flow process for optional supervisor approval of bills
- Bill 'Batch Entry' with batch control totals
- Flexible interface with A/P systems; use system as a "smart" front-end to the bill payment process
- Scanned image of each bill can be retrieved and viewed
- Tracks Interval Data (15-minute 'raw' data from large electric meters)
- Budgets – Create and manage multiple budgets, print reports
- Simple or complex formulas to split usage and costs in shared facilities using Virtual Meters: example: Split electric bill to two agencies 60%-40%
- Assign costs to submeters and virtual meters via rate schedules
- EDI 810 bill entry – Electronic Data Interchange formats accepted as well as CSV flat file for bill import
- Accrual functions for month and year-end accounting needs

### ORGANIZATIONAL STRUCTURE Requirements

- Total flexibility for regions, departments, divisions, units, sites, etc. No limits on levels or complexity
- Unlimited number of buildings, meters, accounts, vendors
- "Treeview" interface to easily navigate within organization
- User-defined fields for building, meter, account, vendor data
- Unlimited number of user-defined "groups" of meters or buildings for reporting
- Data importer allows new user to easily lay out entire structure (accounts, meters, buildings, etc) in Excel and import to system.
- No limits on number of buildings, accounts, meters, users
- Benchmarking allows user to create any number of 'peer groups' and instantly rank buildings by cost/sq ft, usage/sq ft and peak watts/sq ft. Rank meters by usage & cost per day and unit cost. Indicates the group average and instantly highlights 'outliers' – abnormal meters, buildings and bills.



## SECURITY & ACCESS Requirements

- Login requires user name and password
- Variable levels of user access (view only, view & edit, etc)
- User access can be limited to specific buildings, depts., etc
- No limit on number of users

## REPORTING Requirements

- Standard "canned" reports
- Automated report emailing
- Crystal Reports or Access can be used to design new reports
- Report settings can be saved as Favourites
- Many reports can be packaged into batches; one click runs many reports
- Flexible options for filtering report data
- Reports can be exported to many file formats
- Reports can be directly emailed (no prior export required)
- Special export formats designed specifically for Excel
- One-click transfer of billing data to Excel

## DEPLOYMENT Requirements

- LAN client-server version using Microsoft SQL Server
- Web-based access (for users outside of the LAN) to live data concurrent with LAN access for inside users
- If an on-line service, (1) user 'owns' the data, (2) user can obtain a backup copy of the complete database at any time, and (3) user can license the application and bring the system in-house upon demand.

## SPECIALTY FEATURES Requirements

- Weather normalization using statistical techniques and variable balance point temperature
- Cost Avoidance – Measurement & verification of savings in accordance with U.S. Dept of Energy and industry standards.
- Load shape manager creates normalized load profiles – benefits electric procurement process, helps ensure the best possible quotes/bids
- Rate/Tariff analysis compares your rates with alternatives
- Production tracking – occupancy, production, etc
- Electric interval data features: import via CSV or MV-90 format, charting, analysis, application of rate schedule to range of dates.
- Issue Tracking feature to easily track savings opportunities and problems; assign to any user, track status, email to building managers.