**Energy Management Information Software**

**Template for RFIs/RFPs**

EnergyCAP, LLC wants to help streamline your Energy Management Information System purchasing process. We offer a GSA contract ([Contract #: GS-35F-231CA](http://info.energycap.com/hubfs/GSAPriceCatalog.pdf?t=1462210080126)) that enables most public organizations to bypass the formal RFP process and purchase EnergyCAP directly from us at the lowest price available.

Alternatively, if you are preparing an RFP or RFI document and aren’t sure how to get started, we invite you to use the following list of features as a template. The Microsoft Word format allows you to cut and paste directly into your document.

|  |
| --- |
| Utility Bill Tracking |
| Track any type of utility bill (any commodity, energy or non-energy) |
| Track any level of bill details (taxes, various charges, time of use charges, KW demand) |
| Bill entry screen layout looks like actual bill |
| Bill entry screen shows history with tables and graphs |
| Auto population of bill start date based on previous month’s bill end date |
| Flexible billing and accounting period designations |
| Supports multiple commodities on a single bill, as separate meters |
| Bill import capabilities with interface to create mapping profiles for different file formats  |
| Import vendor-provided electronic utility billing files |
| Vendor bills can be of any commodity, including multiple commodities on a single bill |
| Configurable for complex accounts such as solar, on-site generation, multiple vendors, deregulated scenarios |
| Quality assurance tests to catch obvious bill errors  |
| Ability to manage complex unbundled/deregulated accounts with multiple vendors |
| Automated bill audits to identify and flag potential problems |
| Flexible workflow process for optional supervisor approval of bills and distributed approval by multiple departments or organizational divisions |
| Memo and message capabilities to assign problem bills to users, categorize issues, add notes and comments, and track savings recoveries |
|  Bill batch entry with batch totals (batch totals in dollars and consumption units); batch totals are stored and reportable |
| Flexible integration capabilities with accounting systems for posting of bill records to accounts payable, general ledger, and/or accounts receivables.  |
|  Use system as a “smart” front-end to the bill payment process; ability to assign general ledger/budget/accounting codes to each utility account. |
| Scanned image of each bill (if available) can be retrieved and viewed via a direct link |
| Ability to split usage and costs in shared facilities using Virtual Meters (e.g., Split electric bill to two agencies 60%-40%) |
| Assign costs to tenants, submeters, and virtual meters via licensee-created rate schedules or master meter unit cost |
| Available service to obtain, import, and audit utility bills in different formats (Paper, PDF, XLS, TXT, CSV, EDI file formats) and via different methods (FTP, Email, Web Capture, Mail Redirect, Website Upload) |
| Available service to manage utility vendor accounts and resolve billing issues |
| Accrual functions for month- and year-end accounting needs |

|  |
| --- |
| Meter Data Tracking |
| Import Interval Data in many flexible formats and file types (Import data from vendor meters, internal installed submeters, BAS, etc.) for display and analysis via easy-to-read charts, graphs, and reports  |
| Manual entry of meter readings through organized routes |
| Accommodate changes/corrections to imported or entered readings |
| Notification if meter data has zero, missing, or abnormal values |
| Apply cost to interval meter readings for the purpose of creating a monthly use/cost allocation |
| Reports to check the reasonableness of meter readings before cost allocation bills are created |

|  |
| --- |
| Organizational Structure |
| Complete flexibility for departments, divisions, sites, etc.; no limits on levels or complexity |
| Unlimited number of buildings, meters, accounts, vendors |
| “Treeview” interface to easily navigate within organization |
| User-defined custom fields for building, meter, account, vendor data including Boolean (yes/no), integer, text, decimal, date, multi-select lists, attach documents, and web URLs  |
| Unlimited number of user-created “groups” of meters or buildings for benchmarking and reporting |
| Data importer allows new user to easily lay out entire structure (accounts, meters, buildings, etc.) in Excel and import to System for initial setup and periodic bulk updates |
| Setup wizards for manual entry and update of data records |
| Ability to mass update records using spreadsheet templates or other methods |
| Views for grouping data by vendors, rates, and commodities |
| Separate views and data structures for energy management (buildings and meters) and accounting information (accounts and cost centers) |

|  |
| --- |
| Security & Access |
| Login requires username and strong password |
| Password expirations in a user-defined period |
| Variable levels of user access (view only, view & edit, etc.) via user-defined Roles |
| User access can be limited to specific buildings, departments, agencies, etc. |
| No limit on number of users |
| Single sign-on user login functionality available |
| Availability of database hosting the meets or exceeds Federal Information Security Act (FISMA) standards |

|  |
| --- |
| Reports |
| Quick views of data via charts and graphs that are continuously updated and display actionable data for key metrics  |
| Dashboards. Display energy cost and consumption data on user-defined dashboards |
| Dashboard mapping on GoogleTM maps using building geocoordinates or addresses  |
| Sharing of dashboards outside of the application for public access |
| Hundreds of available reports, charts, and graphs |
| Reports use Microsoft SSRS reporting engine |
| Design new reports via available report designer capabilities using Excel Power Pivot |
| Report settings can be saved as Favorites or made public for other users to access |
| Flexible options for filtering report data |
| Reports can be exported in multiple file formats |
| Reports can be directly emailed (no prior export required) |
| Email report publisher automatically distributes reports to lists of recipients per your schedules and filter options |
| Connection to Business Intelligence tools like PowerBI, Tableau, etc. |

|  |
| --- |
| Deployment and Development |
| Hosted by vendor in a commercial data center that has industry accepted certification (SOC2, SSAE-16, etc.)  |
| Web-based application using current browser client technology (HTML5 or comparable); compatible with Chrome, Edge, Safari, and Firefox |
| Routine maintenance and backups performed, daily back-ups to onsite and offsite servers. |
| Application and hosting center are regularly scanned for vulnerabilities using industry recognized services and software |
| Company’s main business is publishing this software. At least 50% of annual company revenues are derived from licensing and supporting this application |
| Company track record in upgrading this software. Regular upgrades to meet changing industry needs and energy management priorities |
| Accommodate large datasets. Suitable for larger organizations (Fortune 1000 corporations, large cities and government agencies, major universities); ability to track up to 100,000+ meters per dataset |

|  |
| --- |
| Specialty Features |
| Weather normalization using verified degree day statistical techniques; automatic daily download of weather data from a credible weather source like The Weather Company (TWC) |
| Cost Avoidance. Measurement & verification of savings in accordance with the IPMVP protocol and U.S. Dept of Energy and industry standards |
| Calendarization “smooths out” utility bill usage and cost data by allocating them to the appropriate calendar month |
| Normalize energy consumption data to a user-selected baseline year for an “apples-to-apples” comparison across multiple years |
| Tracking of custom factors to be compared to energy consumption and costs for benchmarking and reporting on criteria such as occupancy, production, hours of operation, etc. |
| Greenhouse Gas emissions & Green Energy credits tracking & reporting; complete web-based library of conversion factors for CO2 equivalencies |
| ENERGY STAR benchmarking interface stores and distributes building attribute data to ENERGY STAR Portfolio Manager and receives energy efficiency ratings back |
| Project tracking. Report the energy and cost savings from your energy management projects |
| Ability to track and report on renewable and generated energy |

|  |
| --- |
| Features in Detail |
| Utility Bill Tracking. Comprehensive tracking of utility bills; any commodities, any level and type of bill details. Includes: workflow manager; link to scanned bill images; memo and message system; user-friendly treeview interface; ability to track standard and deregulated bills (separate LDC/supplier charges). |
| Bill Audits. System automatically check bills upon entry or import for a range of potential problems (such as excessively high or low usage, cost, unit cost, demand; duplicates; abnormal dates; missing bills); user-defined sensitivity settings |
| Flagged Bills. Create flags on bills to easily track savings opportunities and problems; assign to any user, track status, email to stakeholders, and attach cost recovery amounts.  |
| PowerViews. Usage, cost, demand, and unit cost trend charts and graphs that are automatically displayed and constantly updated.  |
| Benchmarking Charts. Create any number of ‘peer groups’ and instantly rank the buildings by cost/sq ft, usage/sq ft, and peak watts/sq ft, and by custom factors, such as enrollment, units produced, or operating hours. Rank meters by usage & cost per day and unit cost. Indicates the group median and instantly highlights ‘outliers’—abnormal meters, buildings, and bills. |
| Hundreds of Reports, Charts, and Graphs. Reports cover a wide range of categories—Billing, Analysis, Weather, Year-to-Year, Invoice, Cost Avoidance, Budget, Channel, Setup, and Greenhouse Gas—and can be exported in multiple formats. |
| Greenhouse Gas Tracking and Reporting. Calculate GHG emissions resulting from the energy use tracked in System via accounts, meters, bills and counters and the resultant estimated emissions from indirect use. Report GHG emissions via standard reports, trend charts, and PowerViews.  |
| ENERGY STAR Benchmarking Interface. EPA’s popular ENERGY STAR Portfolio Manager ranks each building against a peer group and provides an energy efficiency rating. System allows users to configure buildings for submission to the ENERGY STAR interface, Portfolio Manager, and returning the rating results for analysis and reporting. |
| Weather data tracking; degree day charts and reports. Track average daily temperature for any number of weather stations. Degree days are automatically calculated and charted for quick year-to-year comparisons. Enter data manually or download weather data daily from The Weather Company. (Advanced statistical analysis of use vs. weather is in the Cost Avoidance module.) |
| Unlimited Users. Any number of user logins; configurable access levels. Each user has a login name, strong password, list of accessible menus and features. Users can be limited to individual buildings, departments, or organizational levels. |
| Interval Data Tracking. Track meter interval data (15, 30, or 60-minute intervals) from vendor meters or from internal submeters or data loggers. Many options for charting, auditing, aggregating, and analyzing.  |
| Split Bills by Percentages. Automatically split bills for shared facilities. Example: Public Safety Building is charged 60% to Police Dept and 40% to Fire Dept. Split each actual bill into two ‘virtual bills’ for reports and general ledger chargebacks. |
| Chargebacks. Create monthly cost and use allocation bills from meter readings or virtual formulas. Most often used on university campuses, military installations, or property management companies to create chargeback ‘invoices’ for reimbursable, tenant, or self-supporting activities. Submeter readings can be keyed or imported from metering systems or BAS. Virtual formulas can be created using advanced logic. |
| Bill Import. Ability to import every line item on a bill using flat file formats. Import thousands of bill records at one-time. Mapping capability to line file columns to bill observation types.  |
| Accounting Integration. Export bills to Accounts Payable or General Ledger. After entry and approval, export bill records to an intermediate file. The intermediate file is then imported into an A/P or G/L system for payment. System is used as a ‘smart front end’ on the A/P system; one that performs detailed bill verification/auditing, while at the same time capturing bill details for energy management purposes. |
| Accruals. Create estimated bills (accruals) based on actual historical bills when it’s necessary to ‘fill up’ an accounting period with data. Accrued bills can be exported to G/L and then reversed after close-out or when the actual bill is received. Alternatively, an Accrual Report (included in all versions) based on daily costs can be used in place of the full Accrual module when a simple year-end estimate of not-yet-received bills is required. |
| Cost Avoidance. Calculates the cost avoidance (the dollar savings) attributable to energy management projects by comparing today’s bills with a pre-retrofit ‘baseline’ year. Comparisons are automatically adjusted for billing period length, weather, energy unit prices, and other variables in accordance with the U.S. Department of Energy’s ‘whole building method’ of energy savings measurement & verification (see [www.EVO-World.org](http://www.evo-world.org/)).  |
| Calendarization & Normalization. Calendarization splits bills into the appropriate calendar months by estimating the cost and usage attributable to the portion of the bill that falls in each month. The Normalization process begins with calendarized usage data and then adjusts weather sensitive meters for the degree days in the user-selected weather normalization year to more accurately compare year-to-year usage.  |
| Dashboards. Create custom dashboards for tracking of key performance metrics. Library of filterable widgets to choose from. Mapping capabilities using GoogleTM maps. Share dashboards to other users with ability to get an iframe link for dashboards to embed into websites for public access.  |
| Bill Entry Service. Option for automated bill entry using industry leading technology to receive, process, and enter bills into the system. Ability to process paper, pdf, flat file, and EDI bills delivered via mail, ftp, email, vendor websites, or website upload. |
| Available REST API to extract and utilize utility data and/or to interact with other applications. |