Appendix L: Information Technology Requirements

The PMC is required to use Energy Trust’s information technology (IT) systems and software as outlined below to document aspects of its work. Energy Trust systems are the system of record for all program activities. These systems also provide contract and project management functionality to the PMC. The PMC may elect to develop additional tools to manage their Energy Trust-related work. At a minimum, the PMC must use Energy Trust's systems as specified to allow Energy Trust to distribute incentives and track and report on the program.

1. Software

The PMC is required to use or integrate with Energy Trust’s IT systems for tracking projects, which include:

- Microsoft Dynamics Customer Relationship Management (CRM), a customer relationship management application.
- Project Tracker, a proprietary browser-based application for tracking participant projects, measures, incentives and energy savings.

Energy Trust requires that the systems defined below serve as the systems of record for all program data.

A. Customer relationship management system (Microsoft Dynamics)

The Microsoft Dynamics CRM application is used to track customer engagement. Types of information collected include, but are not limited to site information, contact information for individuals and organizations, phone calls, emails and notes. CRM is also used by the PMCs to manage allies, including tracking ally names, addresses, specialties, enrollment status and contact information.

The CRM database is located at Energy Trust and the Energy Trust IT department is responsible for its administration. All individual users will be required to attend training prior to being granted access to CRM. Energy Trust is responsible for training users on how to use its systems and software. Ongoing trainings will be required as needed to improve data quality and customer service.

2. Project Tracker (PT)

Energy Trust’s Project Tracker system is used to document and track project details including proposed, committed and installed measures, measure savings, and project forecasts. It is also used to request, review, and approve incentive payments. The PMC will be responsible for entering information for all projects and transactions. Data from Project Tracker will be the primary source for analysis.

All data is administered by Energy Trust’s IT department, including ability to utilize the project tracking system. All individual users will be required to complete on-line training prior to being granted write access to Project Tracker. Energy Trust is responsible for training users on how to use its systems and software. Ongoing trainings will be required as needed to improve data quality and customer service.
A. Web applications
Development and support of web applications that interact with Energy Trust’s Project Tracker system require the approval of Energy Trust web team and IT department. Development of web applications hosted on Energy Trust’s corporate site is managed by Energy Trust’s web team. The PMC is required to proactively communicate new requirements for web applications to Energy Trust’s web team and work with the web team to determine viability of the request and the timeline for implementation. Respondents should document how their applications and architecture can support modern, SOAP and REST web services to support current or future integration requirements.

B. Integration services
Business-to-business data exchanges and interaction with externally hosted web applications may be supported by Energy Trust’s IT department. Development of integration services requires approval and prioritization of the Energy Trust’s Business Systems Prioritization Team. The PMC is required to proactively communicate new requirements for integration services to Energy Trust’s Business Systems Prioritization Team through Energy Trust operations analyst staff that will coordinate with the Business Systems Prioritization Team on implementation timelines. Respondents should document how their applications and architecture can support modern, SOAP and REST web services to support current or future integration requirements.

C. Data entry
The PMC will be expected to record pertinent contact and project information in the Project Tracker and CRM systems.

All contacts made with a participant or potential participant are recorded in CRM. Initial contact with a potential participant requires the creation of a contact record for that participant in CRM if the record does not already exist. Subsequent contacts with participants are added as addendums to the appropriate contact record in CRM. Maintenance of all records and management oversight of duplicate record creation is an essential part of the customer relationship management process.

All projects and incentive payment transactions are recorded and maintained in Project Tracker and reference customer, site, and other information stored in CRM.

D. Extranet
Energy Trust maintains a SharePoint extranet that is used as a common repository for program-specific documents and other Energy Trust administrative processes. The finalized forms repository and other administrative process documents are available on SharePoint. The PMC will be required to adhere to the specified uses of the extranet. Use and understanding of SharePoint is required to post and/or edit documents in SharePoint.

E. Internet connectivity
The PMC will be responsible for providing and maintaining an appropriate high-speed, high-performance internet connection and compatible Windows-based computers so that its staff can effectively access Energy Trust systems and software. Energy Trust recommends dedicated internet bandwidth and the ability to monitor that bandwidth. The PMC will also be responsible for virus protection, security and appropriate firewall precautions. All costs associated with the internet connection and any costs associated with anti-virus, security and firewall precautions will be the responsibility of the PMC at no cost to Energy Trust.
F. Secure access
Energy Trust provides secure access to its systems by way of HTTPS/SSL encrypted traffic for web resources and Remote Desktop Gateway for specialty applications. The PMC will be responsible for abiding by Energy Trust compliance, access, security, and confidentiality procedures. To request systems access, all individual users will be required to execute a new-user account set-up form, a non-disclosure agreement and a specific utility customer information non-disclosure agreement. The PMC is responsible for notifying Energy Trust immediately upon an employee’s separation or assignment to work that does not require access to Energy Trust systems or requires changes to the levels or areas of systems access. Energy Trust monitors all individual system access authorizations and obtains confidentiality agreements for all new personnel. The PMC will comply with all Energy Trust security procedures.

G. PMC desktop and network support
PMC will supply computers for its authorized employees to access and use Energy Trust systems and software, as such systems and software, may be updated by Energy Trust from time to time. Current Energy Trust standards are Windows 10, Google Chrome, and Microsoft Office 2016 or Office 365 and above. PMC is responsible for assuring that the appropriate software licensing is in place for any workstation or user that is granted access to a desktop environment on the extranet.

The PMC Ops Analysts may need access to the Energy Trust Microsoft Remote Desktop Gateway. Firewall traffic will need to be allowed to various energytrust.org addresses on ports 443 and 3389 or an alternative encrypted port at Energy Trust’s choosing.

H. PMC information systems security
PMC will implement and maintain all appropriate technical, physical and organizational security and confidentiality measures in accordance best industry practices as necessary to protect against unauthorized or unlawful access to or processing of Energy Trust data and against accidental loss, alteration, disclosure or destruction of, misuse of, or damage to Energy Trust data. In addition to the requirements outlined above, PMC will (i) ensure that Energy Trust data is stored securely in the United States, (ii) maintain cyber liability insurance coverage as required in the Agreement, and (iii) ensure that all PMC personnel working with Energy Trust data have either attended Energy Trust Sensitive Data Training or viewed the on-line presentation.

I. Confidentiality and nondisclosure
Energy Trust has stringent confidentiality and nondisclosure requirements for customer data, including specific confidentiality and nondisclosure requirements for energy usage data. In addition to any other confidentiality and nondisclosure requirements, Energy Trust will require the selected respondent to sign specific nondisclosure agreements which specifically govern customer account and utility energy usage that is subject to Energy Trust’s agreements with its funding utilities.