



Nexant TrakSmart®

The easiest and fastest way to launch, manage, and report on demand side management programs

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Driven by regulatory and operational requirements, today's DSM administrators must rapidly launch new programs and expand existing programs to educate and motivate customers to conserve energy. While this unprecedented expansion of DSM programs has created many new opportunities, it also challenges administrators to manage programs and report on them efficiently and effectively. DSM programs have historically been managed by spreadsheets and intelligent minds. Today, new tools and streamlined program design, implementation, and tracking are becoming critical as regulators and commercial, industrial, and residential customers increasingly require real-time information and accurate reports on rebate, retrofit, and other DSM programs.

Nexant TrakSmart is the leading enterprise software that allows administrators to easily and efficiently plan, implement, and evaluate an entire portfolio of DSM programs. With TrakSmart, DSM program managers, trade partners, service providers, customers, and regulators have full and secure internet access to authorized data via a standard web browser. TrakSmart automates the complete workflow process—from planning to evaluation—and significantly reduces the time, cost, and potential human error in managing and reporting on DSM activities. In addition, TrakSmart gives utilities the ability to accurately report on how their DSM programs are conserving energy and meeting regulatory compliance requirements.

■ **Easy and fast DSM program creation.**

TrakSmart allows program managers to easily create a wide variety of DSM programs—from air conditioner rebates and low-income weatherization to large custom industrial programs and prescriptive incentive programs. The program assembly module gives managers unprecedented flexibility for modeling their DSM programs. By selecting measures (the program comes preloaded with rich equipment libraries), business rules, timeframes, and partner participants, managers can add or modify a new program in minutes.

■ **Automated tracking and reporting of program performance.**

Standard reports are included in TrakSmart so you can start gaining insights and evaluate common key performance indicators from day one. Program managers can also use the drag-and-drop interface to create custom reports based on any field in the system. Using the report scheduler, TrakSmart will automatically run reports and send them to key stakeholders, including regulators and independent evaluators, for timely access to business critical information and documentation.

■ **Smart program assembly with robust equipment and measure libraries.**

Program managers can maintain a library or database of measures that act as a template for describing new DSM programs. By defining attributes such as name, costs, savings, financial and non-financial incentives, and status, TrakSmart stores a set of measures that make program assembly easier than ever. TrakSmart comes with preloaded equipment libraries that can be used to quickly calculate incentives and evaluate savings for common measures. Equipment libraries can also be bulk-uploaded from AHRI, Energy Star, or other energy savings databases.

Nexant TrakSmart Transforms DSM

With TrakSmart's powerful and comprehensive features, administrators can control the costs of managing DSM programs:

- Launch new programs easily and in record time
- Gain visibility into DSM program data
- Streamline program changes and incentives
- Comply with regulatory reporting requirements
- Automate the entire DSM program lifecycle
- Store all DSM program information in a single system
- Share information easily and securely
- Automate communications with all parties
- Eliminate rebate errors
- Enforce program policies and procedures
- Reduce operational overhead
- Manage programs for both gas and electric customers



Planning: access available DSM resources, optimize demand-side portfolios within integrated resource plans, and flexibly develop fully specified program plans.

Implementation: roll out programs, enlist participants, manage program workflows and documents, analyze results, and generate reports.

Evaluation: role-based access presents key performance metrics and tools that internal and external evaluators use to analyze program effects and test program logic models.

Latest Measure Phase	Measure Name	kW	kWh	Forecast kWh	Measure Cost	Customer Incentive	Forecast Customer Incentive
Proposed	Chiller Replacement	60.00	351.00	224.64	\$3,500.00	\$500.00	\$320.00
	Central AC Tuneup	70.00	385.00	246.40	\$1,500.00	\$350.00	\$224.00
	Subtotal	130.00	736.00	471.04	\$5,000.00	\$850.00	\$544.00
Installed	Water Boiler Replacement	170.00	678.00	355.95	\$4,560.00	\$550.00	\$288.75
	Subtotal	170.00	678.00	355.95	\$4,560.00	\$550.00	\$288.75
Proposed	Water Boiler Replacement	170.00	678.00	169.50	\$5,699.00	\$550.00	\$137.50
	Subtotal	170.00	678.00	169.50	\$5,699.00	\$550.00	\$137.50
Program Total		470.00	2,092.00	996.49	\$15,259.00	\$1,950.00	\$970.25

TrakSmart report showing expected savings and incentives by measure type and project phase.

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Key Features

- Support for entire portfolio of DSM programs within a single TrakSmart installation
- Role-based user management
- Web-based user interface
- Support for complete DSM program lifecycle
- Enrollment
 - Enrollment by program manager
 - Web-based customer registration, program enrollment, and program status
- Program assembly module for workflow creation and updates
 - Sequential steps
 - Asynchronous tasks
 - Task attributes
 - Rule-based approval workflow
 - Task notification
- Program assembly databases
 - Equipment library bulk-loadable from AHRI, Energy Star, and other databases
 - Measure library with flexible hierarchy
 - Standard program library
 - Accounting codes library for tracking invoices to trade allies, rebate expenditure, and more
- Project, program, and portfolio management
 - Project status tracking view
 - Approval management
 - Real-time impacts and savings at project, program, or portfolio level by project status
 - Formula builder for incentive and savings calculations
- Customer management
 - Integration with CIS and CRM systems
 - Web-based customer interface
- Partner management
 - Third-party service definition
 - Integration with program workflow
 - Assign tasks and track performance
- Reporting and auditing
 - Portfolio of standard reports
 - Custom report designer (tables, charts, cross-tab, dashboard)
 - Report scheduler
 - Report output options (PDF, HTML, Excel, RTF, or CSV)
- Document management for planning, implementation, and evaluation lifecycle
- Data encryption for security
- Deployment options
 - Turnkey system installed and configured on premises
 - Hosted system installed at Nexant's tier 4 datacenter with the customer administering the system
 - Hosted service installed at Nexant with Nexant administering the system and managing the DSM programs
- Wide interoperability
 - Operating systems: Microsoft Windows, LINUX, UNIX
 - Databases: Oracle, SQL Server, MySQL
 - Browsers: Microsoft Internet Explorer, Firefox

Contact Us

TrakSmart can be implemented as an in-house solution or as a secure Nexant-hosted solution. Contact us today for more information or a TrakSmart demonstration.

sales@nexant.com

+1 877 604 3104

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Your Trusted Industry Partner

Nexant is the leading provider of smart grid software and clean energy solutions. With more than ten years of experience in energy conservation, energy efficiency, and demand control, we help companies and governments around the world better manage their use of electrical and thermal energy. As a trusted advisor to electric and gas utilities, we provide advice on policies and regulations that encourage energy efficiency and promote the use of renewable and sustainable energy sources.

Our core area of expertise is helping utilities, utility commissions, and third-party program administrators plan, implement, and evaluate demand side management (DSM) incentive programs. We also help utilities use turnkey DSM programs as an energy resource.

Our professionals have analyzed and managed hundreds of DSM programs throughout North America. That hands-on knowledge is captured in TrakSmart, which distills the methodologies needed to design, implement, and evaluate DSM programs of every type and complexity, incorporating powerful features to create a robust, next-generation solution for DSM program management.

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Nexant helped Pacific Gas & Electric create a nonresidential retrofit and demand response program and a refinery energy efficiency program. Our results to date include:

- Nearly \$65 million per year in savings
- 180 gigawatt hours of electric power savings
- 40 megawatts of peak demand savings
- 10 million therms of natural gas savings
- 140,000 tons of CO₂ reduction

DSM Program Clients*

Bonneville Power Administration
California Energy Commission
CenterPoint Energy
City of Redding Electric Utility
City of Tallahassee Utilities
Colorado Springs Utilities
ComEd
CPS Energy
Energy Trust of Oregon
Entergy
Georgia Power
Idaho Power
MidAmerican Energy
New York Power Authority
NorthWestern Energy
NYSERDA
Pacific Gas & Electric
PacifiCorp
Pennsylvania Public Utilities Commission
Platte River Power Authority
PSEG
Questar Gas
Rocky Mountain Power
Salt River Project
Santee Cooper
Seattle City Light
Southern California Edison
Tennessee Valley Authority
Terasen Gas
TN Energy
TXU Energy
Xcel Energy

**Partial list*

