

IS 2.0 Update #6

Detailed Data Migration Plan

As BPA prepares to launch IS 2.0, we have been steadfast in our commitment to deliver a quality product while doing as much as possible to mitigate rework by our utility customers. Customers will not be asked to resubmit any detailed data that has been previously submitted and approved by BPA from the beginning of Fiscal Year 2012 until such time as IS 2.0 goes live. This includes data submitted via EE Central, eedocs@bpa.gov, or direct submission to your COTR as well as custom project proposals that were submitted in the PTR prior to the beginning of FY 2012.

The following list provides details on the various types of detailed data that have been submitted to BPA and how BPA will handle these data submissions. As a reminder, after IS 2.0 goes live, all of these documents will be submitted via IS 2.0.

Lighting Calculators

All lighting calculators that have been submitted and approved after the close of FY 2011 until Dec. 10 will be entered into IS 2.0 by BPA. Please do not resubmit any lighting calculators BPA has reviewed and approved. Before BPA enters any lighting calculators into the IS2.0 on behalf of our customers, we will provide a summary of the approved calculators we will be uploading. We anticipate that we will provide a summary of approved files that we will be uploading on or around Jan. 7. Any calculators that have not been approved prior to Dec. 10 at this time will need to be entered into IS 2.0 by the utility while they are submitting their backlog of detailed data.

Custom Project Proposals

Custom project proposals that have been submitted and approved but for which completion reports were not yet submitted prior to Dec. 10, will be migrated into the new Option 1 Custom Project Calculator by BPA staff. Once the data for these projects are entered into the new custom project calculators, BPA will bundle them for individual utility review to ensure the data migration is accurate and complete. Utilities will then use these custom project calculators for the duration of the custom projects, for completion report data submission, COTR approval, and ultimately to be submitted for reimbursement through IS 2.0. We have not yet established a final date for the delivery of custom project proposals, but if you have a project nearing completion please contact your EER.

Custom Project Completion Reports

Custom project completion reports that were submitted and approved after the close of FY 2011, but before Dec. 10, will be entered into the new Option 1 Custom Project Calculator by BPA. Once entered, BPA will bundle these calculators and return them to utilities so that any missing data can be entered and to ensure the information entered by BPA is accurate and complete. To complete these spreadsheets, customers likely need to provide funding source and detailed measure data to finalize completion reports. We plan to send custom project completion report to utilities for review and completion on or around Dec. 7 and will ask that customers return the completed spreadsheets directly to their EER by Dec. 21. BPA will enter all completed and approved custom project completion reports received by this date into IS 2.0 on our customers' behalf. Customers will submit any completion reports that have not been returned to BPA by Dec. 21 while they are



submitting their backlog of detailed data. We anticipate providing a summary of approved files that we will be uploading on or around Jan. 7.

Custom Projects during the Transition Period

Custom project proposals and custom project completion reports that are finalized during the transition period (that is after IS 2.0 goes live, but before it is the system of payment) should be submitted for COTR approval using the new IS 2.0 compliant Custom Project Calculator. As indicated above, proposals for ongoing projects will be migrated into the appropriate format and provided to utilities so that they will have data in the appropriate format to use for completion reports.

As a reminder, should you want to invoice BPA for these projects during the transition period, you can do so using the current interim invoicing process.

Energy Management Calculators (Track & Tune, High Performance Energy Management, and Energy Project Manager Calculators)

Energy management project data, including Track & Tune, High Performance Energy Management, and Energy Project Manager data, received after the close of FY 2011, but before Dec. 10 will be entered into the appropriate IS 2.0 reporting spread tool by BPA on our customers' behalf. Once complete these spread sheets will be returned to customers for their review to ensure accuracy and completeness. Upon customer review and verification, these calculators will be returned to BPA and entered into IS 2.0. A specific schedule for the review and entry of these spreadsheets has not yet been established. If you have questions regarding the energy management data you have submitted please contact ESI Energy Management Engineer Todd Amundson, or your Energy Smart Industrial Partner.

Should you have questions about any of the data you have submitted since the close of fiscal year 2011 or how this data will be migrated into IS 2.0 once it goes live, please do not hesitate to contact your EER.