



City of Mobile
Request for Proposals
RFP Number: 5514

Hosted Enterprise Asset Management (EAM) Software

The City ("City") of Mobile is seeking proposals from asset management/work order software providers to replace the City's existing Tyler Technologies EAM system.

Written Proposals Due: 5:00 pm local, March 11, 2021

US Mail Address:

RFP 5514
City of Mobile
Procurement Department
PO Box 1948
Mobile, AL 36633

Package & Hand Delivery:

RFP 5514
City of Mobile
Procurement Department
205 Government Street
4th Floor South Tower, Room 408S
Mobile, AL 36644

Questions due to Purchasing@cityofmobile.org by 5:00 pm, March 2, 2021.

Proposals must be submitted in a sealed envelope with at least one signed original and one electronic copy (CD or flash memory drive). Please mark the outside of the envelope "City of Mobile RFP 5514"

The City does not accept email submission of proposal packages.

The full contents of the Request for Proposals (RFP), and any subsequent Addenda to this RFP may be found on the City Bid page at <https://www.cityofmobile.org/bids>.

To ensure you are sent the latest information regarding this request, you may, but are not required to, register as an interested respondent by submitting your e-mail contact information to Purchasing@CityofMobile.org. The City will distribute any amendments or addenda by email, as well as posting on the City bid page.

Table of Contents

1	General Information	3
2	Proposal Submission Requirements	5
3	Terms and Conditions	9
4	Proposal Evaluation	12
5	General and Technical Requirements.....	14
	Appendix A – Requirements Checklist.....	18
	Appendix B – Cost Worksheets.....	44

1 General Information

1.01 Introduction

The City of Mobile (“City”) is located on Mobile Bay, in Mobile County, Alabama. The City has a resident population of approximately 195,000. City government employs approximately 2,200 staff including police and fire departments. Mobile is a prosperous, increasingly diverse city, having evolved into the economic and cultural center of South Alabama. Mobile is a major business and retail center while maintaining the safe, family-friendly neighborhoods for which it has long been popular.

1.02 Purpose of RFP

The City is soliciting proposals for a SaaS (software-as-a-service) enterprise work order/asset management (EAM) solution that supports the daily operations of the City’s Public Works departments. The City will also be looking to partner with the selected vendor to provide the associated professional services to complete implementation including data migration, integration, and training.

The City is interested in a solution that provides all the functionality identified below by a single proposer. Detailed functionality requirements are described in **Section 5.0 General and Technical Requirements**. At a minimum, the proposed solution should include the following functions:

- Asset Management
- Service Request Management
- Work Order Management
- Preventive Maintenance
- GIS and Mapping Integration
- Inventory Management
- Fleet Management
- Reporting and Analysis
- Data Import and Export
- Field Mobility
- Integration
- Security
- Support and Training
- Data Migration

The City reserves the right to reject any and all submittals and to waive irregularities and informalities in the submittal and evaluation process. This RFP does not obligate the City to pay any costs incurred by the respondents in the preparation and submission of a proposal. Furthermore, the RFP does not obligate the City to accept or contract for any expressed or implied services.

The City desires a single comprehensive contract/solution that satisfies its service needs from a single vendor. Vendors who have subsets of the requirements are encouraged to partner with other vendors who provide complementary services. While this is not an absolute requirement, single-vendor solutions will be given preferred consideration.

1.03 Background

In the Fall of 2019, the City implemented Tyler Technologies' EAM SaaS system for work order and asset management and Tyler Technologies' 311 SaaS product. Tyler 311 allows citizens and the City's 311 Department staff to submit service requests that are routed to the Tyler EAM system and send back status updates in return. The following Public Works departments make up most of the 200 users involved in the work order and asset management processes:

- Trash/Garbage & Litter
- Public Services Maintenance
- Urban Forestry
- Fleet / Motor Pool
- Engineering
- Traffic Engineering
- Electrical
- Environmental
- Facilities Maintenance
- Building Services
- Parks Maintenance
- Special Events

The City desires to replace the Tyler EAM with a system that meets the following requirements:

- Resilient workflows
- Transparent access to the status of assets, service requests, and work orders
- Flexible tools for managing/automating status notifications to citizens or internal requesters
- Useful asset management tools
- Proven Munis ERP integration (Purchasing and HR)
- Innovative GIS integration
- Powerful yet simple field mobile apps

1.04 Preliminary Schedule

These dates are estimates and are subject to change by the City:

Event	Date
Release RFP to Vendors	February 9, 2021
Vendor Questions Due	March 2, 2021
Answers to RFP Questions Released	March 5, 2021
RFP Response Due	March 11, 2021
Demonstrations/Interviews with Short-Listed Vendors	March 15-19, 2021
Vendor Selected	March 31, 2021

2 Proposal Submission Requirements

2.01 General Instructions

Please submit the proposal by the appointed due date and time to the appointed location in a sealed envelope labeled with the words "City of Mobile RFP 5514" containing at least one signed paper copy and one electronic copy (CD or flash memory drive) as a pdf of the completed proposal.

2.02 Proposal Format

For consistency in our evaluation process, please structure proposals with the following sections in order:

- Cover Letter
- Table of Contents
- Section 1 – Executive Summary
- Section 2 – Company Details and Qualifications
- Section 3 – References
- Section 4 – Proposed Solution
- Section 5 – Implementation Approach
- Section 6 – Other Requirements
- Section 7 – Pricing

Failure to follow the specified format, to label the responses correctly, or to address all the sections may, at the City's sole discretion, result in the rejection of the Proposal.

Technical literature and elaborate promotional materials, if any, must be submitted separately or may be attached as a supplemental response to the required proposal sections; however, such material will not be considered as meeting the requirements outlined in this section.

It's understood that Proposers have limited understanding of the City's organization, mission, assets, environment, and processes. Proposers are asked to make, and state, assumptions based on their experience in providing similar solutions to other customers, recognizing that a full implementation plan will be generated post-award. When describing assumptions, please help us understand your relevant analysis factors, and how alternate City needs would impact your solutions and pricing.

2.03 Cover Letter

The cover letter must be signed by a representative authorized to bind the proposing party contractually. Please identify any exceptions taken to the City's RFP or declare that there are no exceptions taken to the RFP. Include a statement indicating how many days the proposal remains valid.

2.04 Table of Contents

Please number all pages, number or letter all exhibits or enclosures, and list them here.

2.05 Proposal Section 1 – Executive Summary

Provide a one or two-page summary of your product(s), plan, and credentials, suitable for use in briefing senior leaders and elected officials.

2.06 Proposal Section 2 – Company Details and Qualifications

Help us get to know you. Include:

- Official company name and address.
- Provide the name and contact information of the representative for RFP communications and notices.
- Indicate the number of years in business under the present business name.
- Describe the Proposer's familiarity with work order and asset management systems and associated business processes.
- Indicate the number of years of the company's experience in providing required, equivalent, or related products and services.
- Identify the Proposer's existing client base including the number of existing clients using the version / release of the software being proposed.

2.07 Proposal Section 3 – References

Provide at least three references for similar and completed implementations that have been implemented in the last five years. The City prefers references from local government agencies of similar size and complexity to the City. For each reference, please provide the following information:

- Agency name and contact information (i.e. name, title, address, phone, and email).
- Brief project description, including identifying the software version and modules implemented.

- Number of agency employees.
- That agency's Implementation timeline and "go-live" date.

2.08 Proposal Section 4 – Proposed Solution

Please describe here the solution you propose and outcomes the City can expect. Include:

- Overview of the software product(s) you intend to offer the City, identifying origin of system, release history, current release being proposed, and number of operational installations for the proposed software solution.
- Description of the modules / software application components proposed to meet the City's requirements. It is important to note that the level of detail provided will be sufficient to allow the evaluators to understand your product's features, functions, capabilities, and shortcomings / challenges. Proposers can supplement their response using additional product information as an attachment to their proposal.
- Description of any hardware expectations, options, or requirements.
- Please complete and attach **Appendix A, Requirements Checklist**, found at the end of this RFP, with this Section. Guidance on how to complete this document can be found in **Section 5.0 – General and Technical Requirements**, and in **Appendix A**, of this RFP.

2.09 Proposal Section 5 – Implementation Approach

Please identify the proposed implementation approach, identifying each phase, the timeline proposed, roles and responsibilities to be performed by the Proposer and those to be performed by the City. Indicate the City resource requirements to meet the proposed schedule. Include in this section:

- Description of the implementation and project management methodology and approach to ensure a successful implementation.
- Detailed work plan that identifies major activities, tasks, deliverables, and resources so that the City can clearly understand what the additional phases would include and the **timeline** for their completion.
- Description of the roles and responsibilities of the City staff during implementation and an estimated number of City resources, expected role and level of effort during each phase of the project.
- Description of the training methodology and training documentation and how users are prepared to use the proposed solution.
- Recommendation on the expected contract duration. The City is prepared to make up to a five-year contract commitment to the selected software provider.

2.10 Proposal Section 6 – Service and Support

We want to understand how you support your product. Please include:

- Describe ongoing maintenance, release / upgrade, and support services. At a minimum, Proposers should address the following items:
 - Help desk processes and procedures

- Available days and hours of support services (stated in Central Time)
- Escalation procedures
- Response time commitments
- Identify if there are solution user groups and / or user conferences.
- Describe the frequency that application patches and releases have been made available within the past two years. In addition, clearly identify the roles and responsibilities of the City to complete updates.
- Security standards you observe.
- The type and amount of Professional Liability/Technology Professional Liability/Errors and Omissions/Cyber Liability insurance coverage for your product and services you can provide the City as an additional insured.
- Please provide any license agreements you would expect the City to sign.

2.11 Proposal Section 7 – Pricing

The City seeks a clear and comprehensive understanding of all costs associated with the proposed solution, implementation, and ongoing maintenance. For comparison and lifecycle consideration, we are asking for one-time and annual fees over a five-year period. Please complete and include **Appendix B - Cost Worksheets** in this section. Include the following components:

- **Hosted Solution Pricing** – Identify the proposed software modules and hosting costs required to meet the RFP requirements and assist the City’s assessment. Proposers must identify the number of user licenses being proposed for each module and clearly describe the basis for software licensing and the method to justify the number of licenses being proposed.
- **Implementation Services** – Quantity, hourly rate, and total cost for all professional services required for a successful implementation. Proposers are encouraged to provide a breakdown of the service categories that will be provided to support the implementation to allow evaluators to understand the level of effort, resources, and cost of services including:
 - Project management
 - Business process review
 - Software/Services setup and configuration
 - Data migration services
 - Training
- **Integrations** – Costs associated with providing integrations, exports, and imports of data with other systems if not defined as part of the proposed solution.
- **3rd Party Products** – Third- party software required to fully implement the proposed solution and meet the RFP requirements.

- **Optional Offerings** – Optional product or service offerings the Proposer would like the City to consider. If Proposers believe they have additional products and services that may be of interest to the City, please itemize that information.
- **Travel** – Projected travel costs associated with Proposer’s implementation services. The Proposer should identify the anticipated number of trips, days of service per trip, and estimated per trip cost.
- **Professional Services Rate** – The City seeks hourly pricing for additional services that may be required during the implementation. Proposers should provide an hourly rate for any professional services categories offered as part of the proposal. If necessary, the City will use these rates to purchase additional services.

3 Terms and Conditions

3.01 Questions/Clarifications Regarding the RFP

Vendors who request a clarification of the RFP requirements, or who wish to receive email notice of any addendum to this RFP, may submit **questions by electronic mail** to the City of Mobile Procurement Department at Purchasing@CityofMobile.org or by mail to the submission address. Questions must be submitted by 5:00 pm, March 2, 2021, for response prior to the submission due date. Questions and answers will be posted by March 5, 2021, via addendum on the City of Mobile Bid page (www.CityofMobile.org/bids).

3.02 RFP Addendums

The City reserves the right to change the RFP schedule or issue addendums to the RFP at any time. The City also reserves the right to cancel or reissue the RFP. All such addenda will become part of the RFP. If it becomes necessary to revise any part of this RFP, the City will issue the addenda on the City's website at <https://www.cityofmobile.org/bids>. It is the proposing party's responsibility to confirm as to whether any addenda have been issued.

3.03 Withdrawal of Proposal

Proposals may be withdrawn at any time prior to the submission time specified in Section 1.04, provided notification is received in writing. Proposals cannot be changed or withdrawn after the time designated for receipt.

3.04 Rejection of Proposals

The City reserves the right to reject any or all proposals, to waive any minor informalities or irregularities in the submittal and evaluation process, and to accept any proposal deemed to be in the best interest of the City.

3.05 Proposal Clarifications and Modifications

The City reserves the right to request that any proposing party clarify its proposal or to supply any additional material deemed necessary to assist in the evaluation of the proposal. Modification of a proposal already received will be considered only if the request is received prior to the submittal deadline. All modifications must be made in writing, executed and submitted in the same form and manner as the original proposal.

3.06 Proposal Validity Period

Submission of a proposal will signify the proposing party's agreement that its proposal and the content thereof are valid for 180 days following the submission deadline unless otherwise agreed to in writing by both parties. The proposal may become part of the contract that is negotiated between the City and the successful party.

3.07 Proposal Signatures

Please sign your cover letter as part of your proposal.

- An authorized representative must sign proposals, with the proposing party's address, telephone and email information provided. Unsigned proposals will not be considered.
- If the proposal is made by an individual, the name, mailing address and signature of the individual must be shown.
- If the proposal is made by a firm or partnership, the name and mailing address of the firm or partnership and the signature of at least one of the general partners must be shown.
- If the proposal is made by a corporation, the name and mailing address of the corporation and the signature and title of the person who signs on behalf of the corporation must be shown.
- The City reserves the right to request documentation showing the authority of the individual signing the proposal to execute contracts on behalf of anyone, or any corporation, other than himself/herself. Refusal to provide such information upon request may cause the proposal to be rejected as non-responsive.

3.08 Contract Negotiation

The City reserves the right to negotiate all elements of the requirements, submittals, proposals, terms and conditions, and/or scope of services as part of the contract negotiation process prior to any formal authorization of the contract by the City.

3.09 Public Records

Under Alabama state law, the documents (including but not limited to written, printed, graphic, electronic, photographic or voice mail materials and/or transcriptions, recordings or reproductions thereof) submitted in response to this RFP (the "documents") become a public record upon submission to the City, subject to mandatory disclosure upon request by any person, unless the documents are exempted from public disclosure by a specific provision of law. The City assumes no contractual obligation to enforce any exemption.

3.10 Business Registration and Taxation

The successful party will be subject to City of Mobile Business Registration and Business Taxation as presented in the City of Mobile Code. Questions about the City's Business tax should be directed to the City's Tax office at (251) 208-7408.

3.11 Non-Endorsement

The successful party agrees to make no reference to the City in any literature, promotional material, brochures, sales presentation or the like without the express written consent of the City.

3.12 Non-Collusion

By submitting, the proposers acknowledge that they have not engaged in unlawful collusion in the preparation and submission of competitive proposals in response to this solicitation.

3.13 Insurance Requirements

The City will expect the selected vendor to be sufficiently insured relative to the risk involved in providing the goods and services offered to the City. Paragraph 2.10, Proposal section 6, asks Proposers to indicate their coverage, and evidence of such coverage will be required at contract execution.

3.14 Equal Opportunity Requirements

The City is an equal opportunity employer and requires all successful parties to comply with policies and regulations concerning equal opportunity. The successful party, in the performance of the contract, agrees not to discriminate in its employment because of the employee's or applicant's race, color, creed, sex, age, nationality or disability. The requirements of City of Mobile's Code Section entitled "Equal Opportunity", provided to the successful party with the Request for Proposals, are hereby incorporated herein, and shall be binding on the successful party.

3.15 Ownership of Documents

Any reports, studies, conclusions and summaries prepared by the successful party shall become the property of the City.

3.16 Indemnification

The successful party shall hold harmless, defend, and indemnify the City, the City's officers, agents, consultants, and employees against any liability that may be imposed upon them by reason of the successful party's failure to provide compensation coverage or liability coverage.

3.17 Compliance with Alabama Immigration Law

The successful party will be required to enroll in E-Verify and affirm that they will not violate federal immigration law or knowingly employ, hire for employment, or continue to employ an unauthorized alien within the state of Alabama. Furthermore, a contracting party found to be in violation of this provision shall be deemed in breach of the agreement and shall be responsible for all damages resulting therefrom.

3.18 Alabama Boycott Requirement

The successful party will be required to represent and agree that it is not currently engaged in, nor will it engage in, any boycott of a person or entity based in or doing business with a jurisdiction with which the State of Alabama can enjoy open trade.

4 Proposal Evaluation

4.01 Evaluation Procedures

Proposals will be evaluated by the Selection Committee chaired by the City's Chief Technology Officer. The Selection Committee will consider the completeness of a proposal and how well the proposal meets the needs of the City. In evaluating the proposals, the City will be using a criteria evaluation process. All proposals will be evaluated using the same criteria and possible points.

4.02 Scoring and Evaluation Factors

The Committee will consider how well a vendor's proposed solution meets the needs of the City as described in the vendor's response to each requirement. It is important that responses be clear and complete so that the Committee can adequately understand all aspects of the proposal.

The evaluation factors reflect a wide range of considerations. While cost is important, other factors are also significant. Consequently, the City may select other than the lowest cost proposal. The objective is to choose the proposal that offers the highest quality services that will achieve the City's goals and objectives of the requested services within a reasonable budget.

4.03 Evaluation Criteria

The Selection Committee shall determine which proposals meet the basic requirements of the RFP and shall have the authority to determine whether any

deviation from the requirements of the RFP is substantial in nature. The committee may reject in whole or in part any and all proposals and waive minor irregularities.

Proposals will be evaluated and ranked according to the four key criteria outlined in the table and sections below. Each criterion will receive a score between 0 – 10. The score will be multiplied by the "weighting" for that respective criteria with a sum total weighted score given for each proposal.

Total maximum score is 1,000 points with the award offered to the highest scoring Vendor.

Criteria	Proposal Section	Weight	Score 0-10	Weighted Scores
Company Qualifications and References	2 & 3	10		
Product Solution and Capabilities	4	50		
Implementation Approach and Support	5 & 6	20		
Costs	7	20		

- Company Qualifications and References
 Company has adequate experience, organizational structure, financial stability, and capital resources to maintain and support the software product(s) and to fully implement for City infrastructure; experience of the Vendor and their staff in implementing the EAM software product for local governments like the City; availability of the staff proposed to perform the installation, training, project management and support; good references on similar projects.
- Product Solution and Capabilities
 Ability of the software solution to provide the required functional and technical capabilities as defined in **Section 5.0 General and Technical Requirements**; ease of use and the ability of City staff to operate and use the system; clear presentation for all the requested requirements with examples and clarification of how this system could work.
- Implementation Approach and Support
 Vendor demonstrates knowledge of the City’s current work order and asset maintenance activities and systems; displays a complete understanding of meeting the various required functional requirements; a clear presentation for all the requested requirements with examples and clarification of how this system could work; having the staff and resources available for software maintenance, development of a product roadmap, support and training; types and available hours of support services; a

general overview of software and associated training methods for data collection, data entry, database maintenance and updates.

- Costs
Total cost for the proposed EAM product(s), implementation, support, and on-going maintenance of the system; data conversion and migration from the City's current Tyler EAM system; and costs associated with integrations with other City or third-party systems.

4.04 Clarification

The City reserves the right to obtain clarification of any point regarding a proposal or to obtain additional information necessary to properly evaluate a proposal. Failure of a Proposer to respond to such a request for additional information or clarification could result in rejection of their proposal. The City may conduct oral interviews with the most qualified and responsive proposals (short list). By submitting, the vendor agrees to demonstrate their software if they are requested as a portion of the short list process.

5 General and Technical Requirements

5.01 Requirements Checklist

The technical requirements of the solution may be found in **Appendix A – Requirements Checklist**. Please review and include a completed copy of the checklist in the proposal. Instructions for completing the Checklist are included in **Appendix A**.

5.02 Storm Events

Please describe how the proposed solution could accommodate the City's need to respond to storm events such as hurricanes and floods and perform damage assessments of City assets:

- Perform quick damage assessments during and immediately after a storm event. The City's first responder personnel such as Police and Fire would need to document in the field damaged infrastructure and assets in real-time on mobile devices for the Public Works departments during and immediately after a storm, e.g., flooded bridge, fallen tree in the road, damaged traffic signal. A dashboard accessible by computer desktop or mobile device would display each incident in real-time including a live map showing each incident's location. The live dashboard/map would be used in the City's EOC.
- Conduct more thorough post-storm assessments of city infrastructure / assets including documenting and tracking labor, equipment, and materials used for repairs or replacement that is compliant with FEMA reporting and audits.

- Provide examples of similar implementations including agency name and contact information.

If additional or optional modules or license fees are required, please include in **Appendix B – Cost Worksheets** under **Optional Modules** and label as “Storm Events” in the Description column.

5.03 Service Request Management

The City currently uses Tyler Technologies’ 311 module for managing citizen service requests through a public web portal or by phone through a call taker at the City’s 311 Department using the full back office version of Tyler 311. Service requests are automatically routed by request type to Tyler EAM as work orders or to Tyler EnerGov as case requests for code enforcement.

The City has three options:

- **Option 1** - Integrate the proposed EAM solution with Tyler 311 and continue to use Tyler 311 as the citizen facing CRM for Public Works and Code Enforcement service requests.
- **Option 2** - Utilize the proposed solution’s built-in CRM service request module as the citizen facing CRM for Public Works but continue using Tyler 311 for Code Enforcement service requests only.
- **Option 3** - Utilize a 3rd party CRM that integrates with the proposed EAM solution and Tyler EnerGov allowing the 3rd party CRM to replace Tyler 311 as the only citizen facing CRM.

Please recommend one of the three options above and describe how the proposed solution will support this option and meet the needs of the citizens and the City. Also, provide examples of similar implementations including agency name and contact information.

If additional or optional modules or license fees are required, please include in **Appendix B – Cost Worksheets** under **Optional Modules or 3rd Party Products** and label as “Service Request Management” in the Description column.

For Options 2 & 3, please describe the migration process and requirements for importing open services requests from Tyler 311 to the proposed solution’s CRM and include any data migration fees in **Appendix B – Cost Worksheets** under **Implementation Services** and label as “Service Request Data Migration” in the Comments column.

5.04 Tyler EAM Data Migration

All work orders and assets and relevant attributes will need to be migrated from the current Tyler EAM system to the proposed solution. Please describe the migration process and requirements.

Include any data migration fees in **Appendix B – Cost Worksheets** under **Implementation Services** and label as “Tyler EAM Data Migration” in the Comments column.

5.05 SaaS

Please describe the proposed solutions SaaS hosted platform. Include the following information:

- Whether the hosted solution is a single-tenant or a multi-tenant cloud deployment.
- Information security controls for cloud services. Is your system ISO/IEC 27001 certified? If not, please state which information system security standard you are certified for.
- Location of datacenter(s). U.S. or other country?
- Data backup and recovery processes.

5.06 Integrations

A successful implementation will depend on how well the proposed solution can share data with City systems through automated processes. For each City system listed below, please describe how the proposed solution will integrate including whether web APIs (Application Programming Interface) are used or manual processes are required:

- FuelMaster for fleet fuel management.
- ArcGIS Server and ArcGIS Online web mapping services.
- SaaS version of Tyler's ERP Munis system including Procurement for inventory management and Human Resources for work order labor cost tracking.
- 3rd party CRM 311 cloud hosted products if required.
- The City's Office 365 Government platform. Are there functions or processes that can utilize Office 365 modules such as SharePoint or Teams? ***Please note that the City does not allow its Office 365's smtp services to be utilized by 3rd party products for sending email notifications. It is the responsibility of the vendor to provide smtp services to the proposed solution.***

In addition, please describe how the proposed solution can integrate with 3rd party products commonly used by local governments as listed below. Include examples of previous integration projects and what products were used:

- AVL solutions for tracking the location and status of fleet assets in real-time.
- Route management systems for managing and analyzing garbage, trash, and street sweeping vehicles, drivers, and collection routes.

Lastly, please describe which functions and processes within the proposed solution are accessible through web APIs.

APPENDICES

- A Requirements Checklist**
- B Cost Worksheets**

Appendix A – Requirements Checklist

The Requirements Checklist is not a comprehensive list of all the City’s requirements but includes the key requirements that will be used to evaluate the proposals. For each listed requirement, the proposal must include a response code as follows:

Response Code	Definition
Y	Proposed solution meets the City requirement with standard functionality available in the current release. Software supports this requirement and can be implemented out of the box or with configuration at no additional cost. No source code modification is required.
N	Proposed solution does not meet requirement. Substantial system modification would be required to meet requirement.
W/C	Workaround / Customization proposed to meet requirement. Functional workaround or system customization / modification would be required to meet requirement.
T	Available with 3rd party software application. Indicate name of the application recommended and number of installs jointly completed.

The Response/Comment should include a brief explanation of how the item is supported. If a submitted proposal includes blank responses, the document may be considered **non-responsive and may be rejected**.

If the Proposer would like to include other features and functions not listed, please insert them at the end of **Appendix A** under the heading titled **Additional Features or Functions**.

Please place a completed version of this Appendix in Section 4 of your proposal.

#	Requirement	Response Code	Response/Comment
1	General		
1.1	Must be provided as a complete SaaS (Software as a Service) solution.		
1.2	Must integrate with Microsoft Azure Active Directory for single sign-on (SSO) options.		
1.3	Allows city contractors to utilize the system for city work and projects.		
1.4	Provides a sandbox or testing environment so that changes can be tested before applying them to the production environment.		
1.5	Provides a user interface that is easy to navigate using intuitive menus structures tailored to the efficient entry of data.		
1.6	The cloud hosted solution is supported by resilient data backup and recovery processes including a secondary datacenter so that service disruptions are minimal.		
1.7	Provides a user interface that must be fluid and responsive on desktop and mobile platforms.		
1.8	Provides auto-complete feature to help users quickly enter values (i.e. street names).		
1.9	Provides a design that should minimize number of clicks and screens needed to enter required information.		
1.10	Provides dropdown menus and radio buttons to allow for quick entry of data.		
1.11	The user interface must be browser based, html5 compliant and NOT require any third-party plugins (Flash, Java, etc.) for full product functionality.		
1.12	System must support interface, content, and workflow customizations by a trained system administrator without programming skills.		
1.13	Ability to directly print any screen or report to any printer configured to the operating system on the user's device, i.e., no special configuration settings are required in the EAM system to print to a designated printer.		
1.14	Ability to customize end user forms to facilitate a more focused user interface for each group of end users.		

1.15	Has on-line help throughout the system that includes examples, warnings, and graphics. The online help must be regularly updated and kept current.		
1.16	All users have online access to current training documentation.		
1.17	Provides validation of mandatory fields before allowing user to progress to the next screen and/or save the record.		
1.18	Provides system field validation (e.g. date validation, and input values to be validated against tables).		
1.19	Provides system prompts to user before taking irreversible action.		
1.20	Ability to support basic word processing features, i.e. word-wrap, spell check, cut, copy and paste.		
1.21	Provides a toolbar with graphical buttons to perform common functions.		
1.22	Ability to visually distinguish between fields that are required and fields that are optional.		
1.23	Supports user-defined fields to store and track information as needed.		
1.24	Multiple calendars may be defined and used throughout the system.		
1.25	Calendars configurable for non-working days and City holidays.		
1.26	User permissions are role based throughout the system including service requests, work orders, and assets.		
1.27	Ability for user level preferences to be setup and saved.		
1.28	Ability to remove or hide unused data fields on screens to reduce clutter.		
1.29	All email notifications generated by the EAM system do not utilize the client's SMTP server or services.		
1.30	Flexible licensing that allows for temporary increase in number of users for damage assessments.		
1.31	Licensing does not restrict the number of assets, service requests, or work orders created and managed within the system.		
2	Asset Management		
2.1	Ability to maintain a history of all activities, including labor, part, and equipment costs that have been performed on a particular equipment unit.		
2.2	Ability to provide a complete, life-to-date history, listed in chronological order, of all activities performed on an asset, sortable and filterable by activity type.		

2.3	Ability to preserve all historical work activity associated with an asset if asset is removed from the EAM inventory.		
2.4	Ability to add and access in the office or in the field digital files associated to an asset including photographs, manufacturer information, warranty information, standard operating procedures, or other documents.		
2.5	An Asset or group of assets can be selected by searching multiple data fields simultaneously including user defined data fields.		
2.6	An Asset or group of assets can be spatially selected on a GIS map.		
2.7	Allow for easy asset creation with only basic information and the flexibility to require certain key fields.		
2.8	Provides the capability of defining unique asset attribute lists for each asset class and type, displayed according to the asset being examined; attributes may include technical specifications and capacities		
2.9	Ability to specify certain asset attributes as required or optional, unique to each asset class and asset type, during asset record creation. Also, can define a set of required and optional attributes for each unique asset class and type.		
2.10	Ability to assign assets to specific employees or work groups permanently or temporarily.		
2.11	Ability to track licenses/certifications for users of each type of asset/equipment and prompt renewal or expiration notices.		
2.12	Ability to provide a complete inventory of all equipment used during a maintenance activity.		
2.13	Ability to record multiple labor costs, by job class including hourly rate type (i.e. regular, overtime, double time, holiday time, etc.) number of hours, and extended (i.e. calculated) costs.		
2.14	Ability to look at past repair history of an asset.		
2.15	Ability to track manufacturer's warranties by user-defined criteria.		
2.16	Provides links to warranty contracts and warranty claims for assets, major components, and parts.		
2.17	Ability to track all work activities performed in a specific location or within a specific area.		
2.18	Ability to record and maintain equipment acquisition data.		
2.19	Assets including equipment must have unique IDs preventing asset duplication.		
2.20	Ability to review the repair and associated operating costs on equipment and components for any series of months, quarters, years, and life cycle.		

2.21	Ability to track equipment downtime (in service/out of service) and for what reasons (reason for repair codes).		
2.22	Ability to use a user-defined field to store a different asset ID number for use in linking to other City systems (e.g. ability to use a user-defined attribute field on the asset record to store the fixed asset ID from the City's financial system). Field must be searchable.		
2.23	Ability to store information related to engineering design/construction drawings (including but not limited to project name, designer, inspector, individual assets associated with project, related costs to project, construction/installation date).		
2.24	Ability to create new asset record(s) using an existing asset record including carrying over selected attribute data.		
2.25	Ability to generate a list of assets with warranty end dates approaching based on a user-defined timeframe.		
2.26	Ability to utilize mobile device's camera system to scan barcodes on assets.		
2.27	Allow each department or group to view/edit their assets (including location, condition, etc.) without seeing the assets of other departments or groups.		
2.28	Provides multiple options to designate the physical location of assets such as address or location description.		
2.29	Ability to define and assign different statuses to assets (e.g., draft, to be reviewed, operational, out of service).		
2.30	Ability to capture additional asset attributes during the work activities in the field and post those attributes to the existing asset or create a new asset if not in the system.		
2.31	Ability to assign and view hierarchical relationships between a parent asset and related child assets.		
2.32	Provides the capability to group assets into user-defined systems and sub-systems (e.g., Traffic Signals, bridges, storm systems, etc.) and to designate parent and child assets for a system/sub-system.		
2.33	Ability to track CIP projects, special projects, and in-house projects and differentiate between types.		
2.34	Ability to identify each project and link all costs, resources, requirements, contracts, work orders etc. using that identifier to track total project cost.		
2.35	Allows for multiple inspections/tests per asset/equipment to be recorded and stored. Inspection records should have fields to store date and performer information.		

2.36	Ability to attach, link, and view a checklist or specific instructions for any type of inspection, testing, or repair.		
2.37	Ability to maintain, track, and document the remaining useful life, condition, criticality and potential risk for an asset or facility.		
2.38	Tracks asset activities and history for the life of the asset.		
2.39	Ability to create user-defined inspection forms/screens or modify standard system (pre-configured) forms/screens based on City's template for asset types and/or specific purposes.		
2.40	Ability to generate a notification based on the condition documented on an inspection or test.		
2.41	Ability for inspection records for a given asset to be visible within that feature's module.		
2.42	The system can define custom inspection observations with weighted scoring by asset type. Weighted scoring should result in a condition score on the asset. Scoring weights can be defined.		
2.43	Ability for field inspection modules to be able to internally calculate next inspection dates on both fixed (based on schedule) and floating (based on completion) dates.		
2.44	Ability to share inspections with outside agencies.		
2.45	Ability to track installed dates, removed dates, and original costs.		
2.46	Ability to track expected lifecycle data at a system, subsystem and component level.		
2.47	Ability to track condition with useful life estimates by asset type, e.g. signs, bridges, culverts, street lights, roads, etc.		
2.48	Provides for recording asset lifecycle information including PO/contract, purchase date and cost, in-service date, projected and actual retirement dates, expected life		
2.49	Ability to add assets to a backlog, noting the need for asset repair and/or replacement. The backlog should display estimated useful life, life cycle status, condition code, replacement date and cost.		
2.50	Supports interface, content, and workflow customizations by a trained system administrator without programming.		
2.51	Ability for an authorized user to mark a new asset as "Accepted" in the asset inventory.		
2.52	Must be able to report on total cost of maintenance for one or many selected assets.		
3			

Service Requests			
3.1	Citizens can submit service requests through an online public portal, view their submissions, see other submissions, and receive status updates by e-mail/SMS text messaging.		
3.2	Ability to integrate with other 3 rd party CRM systems.		
3.3	Internal requestors can submit service requests through a secure, online portal and receive status updates by e-mail/SMS text messaging.		
3.4	Ability to auto generate an email/SMS text message notification to the citizen or requestor acknowledging the request was received and provide the service request number.		
3.5	Ability to provide status update and a closure resolution on a work order from the work order module to the service request module so that a requestor can be notified by email/SMS text messaging.		
3.6	Ability to notify by email/SMS text message a citizen or requestor when an additional work order or other work activity has been added to a service request.		
3.7	Citizens and internal requestors can attach documents or images to the service request.		
3.8	All portals must be customizable, mobile-responsive, and display live data in synch with the EAM system.		
3.9	Public portal can incorporate City branding.		
3.10	The citizen portal must allow requestors to create an account that includes a user name and password. The logon credentials can be reset or retrieved by the citizen through email without assistance of an administrator. This is optional and the portal still allows citizens to submit anonymously.		
3.11	Full citizen registration management (ability to merge duplicates).		
3.12	Ability to send all service requests from citizens to a holding que where a call taker can review and modify before it is automatically routed to the proper user group/department.		
3.13	Ability to create unique templates for various service request types with dropdown menus to identify questions to assist with obtaining helpful information from the customer and help with assigning a priority to the reported issue.		
3.14	Ability to provide for unlimited user-defined service request codes.		

3.15	Ability for a user, with appropriate access rights, to created and update a knowledge base that is searchable by service request type.		
3.16	Users and call takers must have easy access to customized call scripts with user defined questions, instructions, and resolution codes based on the service request type. All responses are passed to the work order.		
3.17	Ability to define required fields for submitting a service request.		
3.18	Requestors must have the option to select from a predefined list of typical service requests.		
3.19	Ability for a user, with appropriate access rights, to create a work order from service requests in the EAM.		
3.20	Ability for a user, with appropriate access rights, to create a service request directly in the EAM.		
3.21	Ability to select service request orders, by a status of Complete or Incomplete, within a specified date range.		
3.22	Ability to assign a primary asset ID from the EAM to a service request, while also providing the ability to record multiple asset IDs for the service request.		
3.23	Ability to assign a service request and/or work order to a street intersection. The user typed intersection name is validated using ESRI geocoding services and stored in the EAM with proper spelling. Also, the intersection can be selected graphically on a GIS map.		
3.24	Ability to assign a service request to an asset(s). The user can select the asset(s) graphically on a GIS map or from a list of asset names that can be filter by basic asset identifying attributes.		
3.25	Ability to validate an asset ID entered on the service request, or to provide notification on screen that the asset is not in the system registry.		
3.26	Requestor has the option to create a service request utilizing a GIS map.		
3.27	Ability for an authorized user to revise date/times on a service request.		
3.28	Ability for an authorized user to modify which asset(s) is associated to a service request.		
3.29	Ability to search for and retrieve additional asset IDs (assets related to the service request issue) from the EAM system asset registry for creating/recording additional work order activities. (as drop down selectable list of values).		
3.30	Ability to automatically log audit data for any changes made to the service request information (who, what, when, “before” image).		

3.31	Ability to auto-populate current date and time into the date and time of “call received” and “service request created”.		
3.32	Ability to display the asset description on the service request automatically upon selecting/entering an asset ID.		
3.33	Ability to display the asset record (and provide access to asset information including historic and other service requests) from GIS or the service request by clicking on the service request asset ID.		
3.34	Fluid search abilities (by address or date or department or team, etc.)		
3.35	Ability to search for service requests by street address or intersection using ESRI geocoding services.		
3.36	Custom data entry fields that can feed into reports.		
3.37	Ability for a user, with appropriate access rights, to track work orders related to service requests.		
3.38	Ability to allow the combining of multiple service requests into one work order.		
3.39	Ability to route request to city staff by geographic layer as defined in the GIS.		
3.40	Ability to track multiple customers per service request.		
3.41	Ability for a user, with appropriate access rights, to specify and revise the priority of a service request.		
3.42	Ability to accommodate fixed kiosk workstations for internal only requestors. Users must not be required to login but do have to enter requestor information (e.g., name, dept, employee id) on the service request form.		
4	Work Order Management		
4.1	Able to generate, spatially map, and track work orders against assets within user-defined workflows.		
4.2	Ability to generate work orders from service requests, creating relationships between work orders, and attaching work orders to any number of assets.		
4.3	Able to allow unlimited number of work orders to be assigned to a user or user group/department, i.e., no limit on the number of work orders assigned to a user or user group.		

4.4	Users assigned to a work order have access to citizen or requestor contact info of the related service request within the full or mobile version of the EAM software.		
4.5	Ability to enable certain service requests and preventative schedule to automatically generate work orders.		
4.6	Ability to generate multiple work orders from one service request and still maintain tracking of each work order through the one service request.		
4.7	Ability to create a work order without a service request.		
4.8	Ability to create work order templates for each Division for the type of service provided (i.e. sidewalk repair, traffic sign down, pot hole, trail maintenance, plumbing repair, roof repair).		
4.9	Ability to route work orders based on user-defined criteria in workflow design with manual override and rerouting capability.		
	A supervisor within a work group or department must be able to transfer a service request or work order to another work group or department without requiring the supervisor to have .		
4.10	Ability to route work orders for approval upon completion based upon user-defined requirements.		
4.11	Ability to indicate a work order is FEMA reimbursable when the work order is created or after the work order is closed; if after the work order is closed, recalculate the equipment rates using the FEMA rate schedule.		
4.12	The current FEMA equipment rate schedule is available within the system.		
4.13	Ability to bulk import FEMA rate schedules.		
4.14	Ability to track material, labor, equipment, and other costs/resources associated with the work activity.		
4.15	Costs should be associated to assets on the work order and asset costs should be easily reportable from within the system.		
4.16	Ability to dispatch work orders to work crews. Work crews should be able to access and prioritize work orders by multiple attributes.		
4.17	Ability to override the assigned crew with substitutes using a dropdown menu with staff names and job titles.		
4.18	Ability to assign a work order to multiple crews, identifying the sequence of the work (tasks); the first crew will complete their portion of the work order and then route the work order to the next crew (i.e. the asphalt repair is completed and now the striping and sign crew is required to complete the work order).		

4.19	Ability to create work orders on a GIS map.		
4.20	Ability to create a work order without associating it to an asset.		
4.21	Users can select and review service requests and work orders using multiple selection and sorting criteria that include all service request and work order fields.		
4.22	Ability to quickly close a work order based upon department/user group's standard response/closure resolution (drop down list)		
4.23	Ability to enter the hourly equipment rate for the use of rental equipment that is required but not available in the city's fleet.		
4.24	Ability to add multiple assets (same asset type) to a work order.		
4.25	Ability to view all work orders on a GIS map and label or symbolize by priority, status, type, etc.		
4.26	Ability to schedule and assign PM (preventative maintenance) or routine work orders for future and planned maintenance.		
4.27	Ability to attach unlimited documents, pdfs, pictures, and multimedia files including video to a work order.		
4.28	Ability to print a work order form which includes a tabular format for field workers to write in labor, equipment, inventory, supplies, and comments. The form can be printed to any printer accessible to a Windows desktop.		
Projects			
4.29	Ability to associate work orders and associated costs to a project with a unique project name and/or number.		
4.30	Ability to assign unique weather related or special event name, e.g., Hurricane Katrina, Mardi Gras 2021.		
4.31	Ability to track a project that includes multiple work orders from various user groups/departments.		
User Input			
4.32	Ability to establish required fields so as to ensure data input integrity.		
4.33	Ability to customize the work order status types that a user can assign to a work order.		
4.34	Ability for user to update requestor's contact information.		
4.35	Ability to display and print special instructions on all work orders.		
4.36	Ability to indicate the work order requires regulatory compliance standards.		
4.37	Ability to generate both scheduled and unscheduled work orders.		

4.38	Ability to record multiple material or spare parts costs, part number, stock location, quantity, and extended (i.e. calculated) cost.		
4.39	Ability to record multiple equipment used including equipment ID, hours used, and extended (i.e. calculated) cost.		
Supervisor			
4.40	A supervisor within a work group or department must be able to transfer a service request or work order to another work group or department without requiring the supervisor to have permissions to the other work group or department's work orders or service requests.		
4.41	Ability to track changes made to an existing work order, i.e., audit log of any changes made to the work order.		
4.42	Ability to assign a priority to the work order (i.e. critical, urgent/safety issues, routine, low).		
4.43	Ability for a supervisor to insert/add an expected duration to a work activity.		
4.44	Ability to compare estimated hours vs. actual hours.		
4.45	Ability to view work orders based on assignment date in a calendar view by day, week, month to support planning/scheduling of work.		
4.46	Ability to assign multiple crews, multiple individuals, multiple contractors, multiple contracts and multiple assets to a single work order.		
4.47	Ability to manage all work orders for that user group or department including work orders assigned to city contractors.		
4.48	Ability to limit permissions to complete, close, or cancel a work order.		
4.49	Ability to enable the user with proper permission to apply corrections to closed and completed work orders.		
4.50	Ability to identify groups and/or individuals for workflow through pre-defined lists for each department as well as ad-hoc entries to support emergency or unique workflow requirements.		
4.51	Ability to track multiple asset warranties and have the warranty automatically flag the user when creating a work order.		
4.52	Enables the user to view the entire history of the stages in the lifecycle of the work order and at any stage of the work order.		
4.53	Manages baseline, estimated, and actual activity dates.		
4.54	Ability to establish service level agreements on the asset type based on the number of days the work order has been open.		

4.55	Ability to establish service level agreements (SLA) for contractors based on the number of days the work order has been open.		
4.56	Ability to automatically escalate work orders that exceed the number of days in the SLA.		
4.57	Ability to report service response times that exceed compliance with the number of days to complete SLA.		
4.58	Copy/duplicate work order to create new.		
4.59	Configurable categories, tasks, reasons, types and sub-types for work performed, including context sensitive dropdowns.		
4.60	Ability to identify overscheduled resources (labor and equipment).		
4.61	Ability to add staff from different crews/groups to a work order.		
4.62	Generate a daily work list for staff based on work orders and assigned tasks and estimated time to complete them.		
4.63	Detect Duplicate work orders by addresses, location, or asset ID.		
4.64	Ability to provide real-time statistics on completed and remaining work to be accomplished by specific work order and by workorder type.		
4.65	The status of service requests that generate a work order are not closed until the work order and all associated work activities, work orders, sub-work orders, and tasks are completed.		
4.66	Ability to create a work order for contract services.		
4.67	When a work order's status changes or is completed, the originating service request is automatically updated.		
4.68	Ability to check for current user certifications and prevent work activity assignment to staff not certified to conduct those activities.		
Calendar			
4.69	Ability to view work activities on a calendar.		
4.70	Ability to view estimated hours associated with assigned work task/work order in a calendar view to support scheduling of work within a defined time period.		
4.71	Ability to view work orders by group, crew, or employee in a calendar view to support scheduling of work within a defined time period.		
4.72	Ability to change start/end dates on a work order from the calendar view to support scheduling of work.		

4.73	Ability for a supervisor to display a work schedule dashboard to list all work activities on a schedule, filter/sort and redisplay work activities for review/revision by status, create date and other configured criteria, select and open a work order from the list, and indicate an approval of the work activity.		
4.74	Ability for a supervisor to review work progress via a daily / shift work assignment and schedule dashboard and enter or revise information (e.g., status or comment).		
4.75	Ability to “click” on a work activity displayed in the dashboard to open and view the detailed information on that work activity; ability for an authorized user to revise or add information to the displayed work activity.		
4.76	Provision to automatically populate the supervisors’ work scheduling dashboard with any pre-existing work orders/inspections due on that date or previously scheduled for that date.		
4.77	Ability to track basic contractor information (name, vendor number, address, contacts, phone numbers, etc.) that are used on work orders.		
4.78	Ability to identify employees and/or crews available to be assigned to after-hours emergency work.		
4.79	Ability to establish employee schedules including standard working days, multiple shifts and hours.		
5	Preventive Maintenance		
5.1	Ability to enable scheduling of maintenance (user-defined timeframes).		
5.2	Ability to allow Preventive Maintenance (PM) activities by a fixed method (for example, every month regardless of when the last Preventive Maintenance was complete).		
5.3	Ability to allow PM activities by a floating method (for example, 30 days from the previous PM close date).		
5.4	Ability to set up and schedule seasonal PM activities.		
5.5	Ability for a comment area on each PM generated work order.		
5.6	Ability to easily modify a PM schedule.		
5.7	Ability to notify a selected list of users if PM work orders are delinquent.		
5.8	Ability to allow the generation of a single work for a single activity to be performed on multiple equipment items. Allow material and labor costs to be allocated to each equipment item either parsed equally or individually.		

5.9	Ability to support dependent PM triggers (i.e. if an asset has a PM triggered then a sub-component of the asset could also have a PM triggered).		
5.10	Ability to associate a PM work order to others for assignment.		
5.11	Ability to allow for multiple parts, materials, and special tools/equipment to be assigned to each PM task.		
5.12	Ability for PM Schedules to be established both by time and meter usage.		
5.13	Ability for PM Schedules to be established based on asset type or class.		
5.14	Ability to display workloads for PM for a future period such as a by year, by week, by month, or by trade.		
5.15	Ability to create a PM schedule with automatic generation of a work order based on user-defined criteria.		
6	GIS and Mapping		
6.1	System must integrate with the City's ESRI ArcGIS enterprise including the ability to consume the latest version of ArcGIS map and feature web services through secured REST endpoints running in ArcGIS Portal or ArcGIS Online in order to link assets to map features and display on a map within the EAM system. The GIS integration is live and no data synchronization or duplication of GIS data from the enterprise GIS into the asset database is taking place.		
6.2	System should provide a map interface that displays all assets and work activities (service requests, work orders, and inspections) and allows the user to search, filter, select, and list attributes from the map.		
6.3	All map interfaces should include pan, zoom, locate, measure distances and select functions in a mobile or desktop environment.		
6.4	Must support multiple map services, specific to users or groups of users, to meet the various GIS needs of each department.		
6.5	Ability to locate address utilizing ArcGIS locating services.		
6.6	Ability to add assets to the EAM asset inventory utilizing a GIS map.		
6.7	Ability to select an asset in the GIS map and create a service request, work order, or inspection associated to the selected asset.		
6.8	All work activities can be displayed live on the GIS map interface based on user preferences. User should be able to open activities from the map.		

6.9	Ability for user to select an area in the map frame and list all work orders contained within the area.		
6.10	Ability for user to select one or more work orders within the system and the map frame zooms to the asset(s) spatial extent.		
6.11	From the system dashboard, ability for the user to display assigned work orders on a map		
6.12	Ability to print or export (i.e. PDF format) a map with a legend and notes displaying work order or asset location.		
6.13	Ability to provide analysis/comparisons of discrepancies of asset IDs between GIS and the EAM and vice versa.		
7	Inventory Management		
7.1	Ability to track inventory assigned to an individual department or cost center.		
7.2	Ability to receive stock at multiple warehouses.		
7.3	Must support barcode scanning through Quatred wireless scanners and/or mobile device cameras for inventory management.		
7.4	Ability to inventory spare parts using min/max control.		
7.5	Alerts users when stock has fallen below user defined minimums.		
7.6	Ability to lookup part inventory items by part number, vendor part number, manufacturer part number, compatible unit code, commodity code, or barcode, as well as other searchable items.		
7.7	Ability to establish and maintain a record of all parts used in maintenance and overhaul activities.		
7.8	Ability to output an inventory report in a format compatible with the latest version of Munis Financial software.		
7.9	Supports automatic and user generated reports of stock levels/quantities.		
7.10	Captures and flags stock expiration dates (when applicable).		
7.11	Supports user-defined units of measure for materials in addition to system defined unit of measure.		
7.12	Ability for users to attach digital photos or other documents to each item type.		
7.13	Ability for users to attach comments/notes to transactions.		
7.14	Ability for users to plan for the reservation of equipment in support of the job.		

7.15	Ability to reserve inventory for capital and maintenance work orders.		
7.16	Ability to track materials in multiple locations.		
7.17	Ability to set up user definable inventory classes and categories.		
7.18	Ability to set up reorder levels and quantities and supports seasonal levels.		
7.19	Ability to receive stock and non-stock items.		
7.20	Ability to generate pick tickets (i.e. material reservations) for stock parts, and issue materials based on the pick ticket.		
7.21	Ability to perform inventory adjustments.		
7.22	Ability to track materials to a location, or a warehouse storeroom.		
7.23	Ability to store manufacturing information.		
7.24	Ability to relocate materials easily and maintain location histories.		
7.25	Ability to track warranty replacements, core tracking/returns and vendor credits.		
7.26	Ability to link necessary parts needed to repair/maintain a piece of equipment.		
7.27	Supports multiple and virtual / rolling (vehicle) warehouses.		
7.28	Ability to Issue/transfer inventory to work orders, warehouses, and people.		
7.29	Provides the ability to reconcile inventory at year-end, at other specified intervals, and on-demand. This includes weekly cycle counting.		
7.30	Ability to notify requestor when parts and materials are received or back ordered.		
8	Fleet Management		
8.1	Fleet Maintenance Management module that provides vehicle information, preventative maintenance scheduling, parts management, cost accounting, work order functions, fuel management, vehicle tracking and analytical tools (tool inventory/checkout).		
8.2	Ability to maintain historical information for each piece of equipment including: - Vehicle mileage and Fuel quantity and costs - Parts - Labor - Work contracted out - Accident or damage, date of incident, repair cost		

	-Warranty from initial claim to reimbursement received -Required inspections		
8.3	Ability to track all vehicle life cycle costs, i.e. purchase price, depreciation, operating expense, maintenance costs, salvage value and replacement cost.		
8.4	Ability to add additional equipment or features added to a vehicle including the acquisition date and cost.		
8.5	Ability to assign a vehicle to a Department and to a driver.		
8.6	Ability to inquire and view all costs associated with a piece of equipment.		
8.7	Allows Vehicle Rate Cost per Hour to be updated each year, according to FEMA Standards, without any previous Work Orders or Vehicle Usage being compromised in the process.		
8.8	Ability to track preventive maintenance schedules for each piece of equipment based on either calendar and meter events measured in both miles and hours.		
8.9	Ability to create a shop schedule with a list of PMs due.		
8.10	Ability to display upcoming services in various formats such as calendars, lists or by type of service or vehicle.		
8.11	Ability to automatically generate an email/sms text notification to the assigned department or driver that a PM is due.		
8.12	Ability to automatically generate work orders based on a factory recall for all vehicles affected.		
8.13	Ability to assign multiple mechanics on one work order.		
8.14	Ability to enter a vehicle number and display all previous work orders associated with the vehicle.		
8.15	Ability to alert the user when a part is covered under warranty.		
8.16	Have a bar coding system for parts and vehicles.		
8.17	Ability to assign repair parts for each mechanical task for each vehicle.		
8.18	Ability to track Part Cores so that recouped fees can be reported.		
8.19	Ability to track issues on parts in order to create parts reliability reports.		
8.20	Ability to track equipment/vehicle maintenance by department and vehicle.		
8.21	Ability to utilize Vehicle Maintenance Reporting Standards (VRMS) codes and industry labor rates for each maintenance task for each specific vehicle and piece of equipment.		

8.22	Ability to measure technician work hours against established labor rates for specific tasks using industry standard labor guides.		
8.23	Ability to document and track outside repair service.		
8.24	Provides integrated real time fuel management system or provides Application Programming Interfaces (API's) to facilitate data import from third party applications such as odometer readings from fuel management system or export to fuel management system (Fuel Master).		
8.25	Ability to generate a report listing PMs completed on time and the compliance percentage.		
8.26	Ability to generate a report listing all equipment currently with an "open" work order.		
8.27	Ability to generate vehicle replacement schedules based on lifecycle data.		
8.28	Ability to generate a report listing all vehicles within a mileage range.		
8.29	Ability to generate a completed work order report by mechanic.		
8.30	Ability to generate reports for auditing and year-end fiscal auditing.		
8.31	Ability to track fleet usage costs by meter either in hours or mileage measuring fuel, repair parts and labor for project planning and cost forecasting.		
8.32	Ability to generate reports on fleet costs based on hours and mileage from Application Programming Interfaces (API's) to facilitate data import from third party applications.		
8.33	Calculate availability percentage by type of vehicle, assigned department, and reason over specified periods of time.		
8.34	Ability to report down time by type of vehicle, assigned department, and reason over specified periods of time.		
8.35	Ability to run detail and summary maintenance reports by vehicle.		
8.36	Ability to run detail and summary maintenance reports by department.		
8.37	Ability to generate invoices for monthly billing purposes (e.g. vehicle rentals, repair parts, and fuel usage).		
8.38	Ability to allow internal users to schedule and/or cancel vehicle reservations for local or out of town travel.		
8.39	Ability to automatically generate a confirmation email along with a computer-generated code for the user that will grant the employee access to the key box to retrieve the keys for their reserved vehicle.		
8.40	Ability to generate a subrogation demand letter when prompted for wreck damage repair to the insurance companies or private citizen.		

8.41	Ability to flag assets that have exceeded the work order repair cost threshold.		
8.42	Ability to send notification to administrative department and servicing department when vehicle and/or equipment should be replaced.		
8.43	Ability to generate a reserve or buyer's premium price for vehicles and equipment are taken out of service and marked for auction based on the year, make, model, and number of repairs.		
8.44	Ability to generate yearly, monthly, daily, and hourly lease rates for vehicles and equipment based on the following criteria: purchase price, additional equipment upfitting, estimated repair costs, less salvage value, overhead, and lifecycle of vehicle and/or equipment.		
8.45	Ability to generate depreciation for each asset that is depreciable throughout the lifecycle of the vehicle and/or equipment and recalculate the lease rate yearly.		
8.46	Ability to track assets and related work by integration with an AVL solution.		
8.47	Ability to provide route optimization analysis and management for garbage, trash, and street sweeping vehicles and collection routes.		
9	Reporting and Analysis		
9.1	Provides "out of the box" reports, i.e. open work orders, assigned work orders, completed work orders, assets scheduled for preventive maintenance. Include a list of the report titles in the proposal.		
9.2	Ability to generate standard FEMA reports of work orders including all labor, material, equipment costs associated.		
9.3	Ability to easily generate standard and customized reports base on any field in the database.		
9.4	Ability to generate a report by city council district including work order types and status.		
9.5	Supports any SQL based report writing tool.		
9.6	Ability to easily export reports to MS Excel or PDF file formats.		
9.7	Ability to report labor, equipment and material costs associated with a work order or multiple work orders.		
9.8	Provides tools and functions for someone with minimal skills to build custom reports with data queries and filters.		

9.9	Ability to interface the EAM database using direct database connections, API calls, web service calls, and file exports/imports.		
9.10	Ability to print and email reports.		
9.11	Ability to schedule reoccurring reports that are automatically emailed to designated users.		
9.12	Ability to complete an inquiry or generate a report by project number for open and/or closed work orders within a date range.		
9.13	Ability to search completed work orders within a date range and report labor, equipment and materials/inventory costs.		
9.14	Ability to select information to display on a report, i.e. date acquired, manufacturer, last inspection date, life to date maintenance costs, etc. then specify the asset type or class and the GIS geographic area of the City (i.e. council districts).		
9.15	Ability to report assets sorted by the last inspection date and condition assessment within a GIS geographic area and by address location.		
9.16	Ability to display work orders completed by a specific crew.		
9.17	Allow "out of the box" reports to be modified.		
9.18	Support Microsoft SQL Server Reporting Services (SSRS) or Crystal Reports.		
9.19	Provide a list of the reporting tools that are included and support industry best practice.		
9.20	Support ad hoc reporting.		
9.21	Ability to save customized reports in a report repository making them available for other users.		
9.22	Ability to view or report either open or completed work orders that are billed to an outside entity (i.e. FEMA, insurance companies for repair to property damage) within a date range.		
9.23	Ability to view or report either open or completed work orders by event category.		
9.24	Ability to export data via PDF, MS Word and MS Excel.		
9.25	Ability to easily print out desired information pertaining to just the records that are queried.		
9.26	Provides reports that meet GASB reporting requirements.		
9.27	Ability to report work done (sort, arrange, analyze, select, or list) by work order, assignee, asset, location (address, building, floor, room), type of equipment or asset.		

9.28	Ability to report mean time between failures (MRBF) that show how often the asset or asset type has been worked on, how many days (or machine hours) lapsed between failures, and the duration of each repair.		
9.29	Ability to report asset failures by failure type and frequency of failure.		
9.30	Ability to track and report response time for a work order assigned to a contractor.		
9.31	Ability to track and report response time for a service request/work order (including service request received time, crew/staff assignment time, arrival time, completion time).		
9.32	Ability to analyze asset downtime by user-selected parameters including but not limited to cost history of time lost, cost history of production lost, details of maintenance performed, failure analysis, and category of work performed.		
9.33	Ability to build key performance indicators (KPIs) and "out of the box" features with available templates.		
9.34	Provides the tools and features available to support creating dashboards.		
9.35	Ability to establish key performance indicators that are calculated using maintenance data and asset attribute information to define the operating effectiveness and efficiency.		
9.36	Ability to create dashboards displaying visual information (such as tables, charts, graphs, dials, maps, cost summaries) for any data stored in the system (e.g. defined KPIs, track any function on a daily, weekly, or monthly basis, pending work orders, work order status, inventory supply, review activity).		
9.37	Able to have a dashboard style page configurable by each user for viewing assigned or monitored work activities.		
9.38	Able to display a live/real time dashboard on digital signage equipment for work areas showing a list of active service requests or work activities of a group or department.		
9.39	Ability to view large scale improvements in dashboard format by geographic area with drill down ability to identify historic and current activity and costs, first by work orders associated with a project and then by open and completed work orders, i.e. when work was completed, what was done and the total value of the project.		
9.40	Ability to display the quantity of work orders that exceed service level agreements (SLAs) and drill down to view the work orders.		

9.41	Ability to drill down to view “active” work orders associated with a geographic area and view work orders scheduled to be completed at a future date.		
9.42	Ability to configure dashboard to provide status of all outstanding work orders.		
9.43	Ability to configure dashboard to show all items pending approval.		
9.44	Ability to configure dashboard to show all items requiring user action.		
9.45	Ability to configure dashboards based on department/group to support specific workflows for each department/group.		
10	Data Import and Export		
10.1	Ability to import assets and associated attributes including bulk import from a Microsoft Excel or delimited tabular format.		
10.2	Asset, service request, and work order data can be exported to a delimited tabular format.		
10.3	Ability to export all work orders and related information for FEMA requirements including all associated costs.		
10.4	Ability to have read-only, real-time, direct access to the EAM database through standard interfaces, e.g., ODBC, SQL Server Native Client, OLE DB.		
11	Field Mobility		
11.1	A mobile version of the software must be available to all users and not require additional licensing.		
11.2	The mobile version must be a fast, lightweight version of the EAM back office solution that focuses on in-field activities such as completing work orders, managing assets, and conducting inspections.		
11.3	The mobile version must be iOS and Android compatible.		
11.4	Allows mobile device users to perform basic tasks in the field in real-time, e.g., identify assets, process assigned work orders, record inspections, and maintain asset information and attributes (add, edit, record location, move, assign/reassign, record measurements).		
11.5	Ability to display all work orders assigned to a user or user group, i.e., there is no limitations on accessing work orders assigned to the user or user group.		

11.6	Allows mobile device users to view all asset attributes and associated digital files including preventive maintenance records, work history, and warranty information.		
11.7	Ability to utilize mobile device's camera system to scan barcodes.		
11.8	Allows mobile device users to input time worked on a work activity by utilizing a start and stop button on the work order input form; system calculates time and simplifies user input.		
11.9	Allows mobile device users to select material and equipment used on assigned work orders from an inventory list.		
11.10	Allows mobile device users with granted permissions to create service requests and work orders.		
11.11	Allows mobile device users to add assets to the EAM asset inventory including utilizing a GIS map. All asset attributes and related digital documents can be input in the field including multiple pictures or video captured by the device.		
11.12	Allows mobile device users in a supervisor or crew chief role to input time, material, and equipment and other data required to complete a work order for each crew member individually are simultaneously.		
11.13	Ability to capture activity on work orders and assets in a disconnected environment and sync with the EAM system once internet connection is re-established.		
12	Integration		
12.1	Provides scheduling and automation tools for data integration with other systems and processes.		
12.2	Supports open standards and web APIs (Application Programming Interface) and can integrate with other City systems.		
12.3	Important functions and processes within the EAM are accessible through web APIs (Application Programming Interface).		
12.4	Ability to integrate with the current SaaS version of Tyler's ERP Munis system including Procurement for inventory management and Human Resources for work order labor cost tracking.		
12.5	Ability to integrate with FuelMaster for fleet fuel management.		
12.6	Ability to fully integrate with widely used Citizen Request Management (CRM) / 311 SaaS products through web APIs.		
12.7	Ability to integrate with Microsoft O365.		

12.8	Ability to integrate with 3rd party AVL solutions commonly used by local governments for tracking the location and status of fleet assets in real-time.		
12.9	Ability to integrate with 3 rd party route management systems commonly used by local governments for managing and analyzing garbage, trash, and street sweeping vehicles, drivers, and collection routes.		
13	Security		
13.1	Security controls for cloud services are ISO/IEC 27001 certified or a similar information security management system (ISMS) certification.		
13.2	Supports Multi-Factor Authentication for user sign on.		
13.3	All datacenters utilized by the hosted services are located in the U.S.A.		
14	Support and Training		
14.1	Able to provide quality level 24/7 technical support for critical issues or service failures.		
14.2	Able to provide live training on-site or remote.		
15	Data Migration		
15.1	Migrate existing Service Request records from current Tyler 311 system into EAM.		
15.2	Migrate existing assets and work orders from current Tyler EAM system.		

Additional Features or Functions

Description	Comment

Appendix B – Cost Worksheets

The Proposer must complete all of the following cost worksheets:

- Hosted Solution Pricing
- Optional Offerings
- 3rd Party Products
- Implementation Services
- Integrations
- Travel
- Professional Service Rates

Do not alter the format or layout of the worksheets. If pricing is from a cooperative purchasing contract, please include the name of the contract in the “Cooperative Contract Name” column.

Please place a completed version of these worksheets in Section 7 of your proposal.

Hosted Enterprise Asset Management (EAM) Modules

Description	# of Licenses	One-Time License Fee	Annual Maintenance and Service Fee					Cooperative Contract Name
			Year 1	Year 2	Year 3	Year 4	Year 5	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
Total – Hosted Modules		\$	\$	\$	\$	\$	\$	

Optional Modules - Hosted EAM

Description	# of Licenses	One-Time License Fee	Annual Maintenance and Service Fee					Cooperative Contract Name
			Year 1	Year 2	Year 3	Year 4	Year 5	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
Total – Optional Modules		\$	\$	\$	\$	\$	\$	

3rd Party Products Required by Proposed Solution

Description	# of Licenses	One-Time License Fee	Annual Maintenance and Service Fee					Cooperative Contract Name
			Year 1	Year 2	Year 3	Year 4	Year 5	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
		\$	\$	\$	\$	\$	\$	
Total – 3rd Party Products		\$	\$	\$	\$	\$	\$	

Implementation Services

Service Category (Please add categories as required)	Hours	Rate	Fee	Cooperative Contract Name	Comments
Project Management		\$	\$		
Business Process Review		\$	\$		
Software/Services Setup and Configuration		\$	\$		
Data Migration		\$	\$		
Training		\$	\$		
Subtotal – Services		\$	\$		
Project Management		\$	\$		
Business Process Review		\$	\$		
Software/Services Setup and Configuration		\$	\$		
Data Migration		\$	\$		
Training		\$	\$		
Subtotal – Optional Services		\$	\$		
Total – Services		\$	\$		

Integrations

Integrations	Hours	Rate	Fee	Cooperative Contract Name	Comments
		\$	\$		
		\$	\$		
		\$	\$		
		\$	\$		
		\$	\$		
		\$	\$		
		\$	\$		
		\$	\$		
		\$	\$		
		\$	\$		
		\$	\$		
Total – Services		\$	\$		

Travel Expenses

Trip Description	# of Trips	Cost Per Trip	Total	Comments
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
		\$	\$	
Total – Travel Expenses		\$	\$	

Professional Service Rates

Category (Please add categories as necessary)	Hourly Rate	Cooperative Contract Name	Comments
Programmer	\$		
Business Process Analyst	\$		
Project Management	\$		
Trainer	\$		
Conversion Support	\$		
	\$		
	\$		
	\$		
	\$		
	\$		