SUBJECT: FLEET MANAGEMENT SYSTEM REPLACEMENT

BID #: ESC-0326-21 **OPEN DATE: 2021-03-17**

COMPETITIVE SEALED PROPOSAL EVALUATION COMMITTEE

KIND AND BASIS OF CONTRACT: COMPETITIVE SEALED PROPOSAL SUPPLY CONTRACT – PERIOD OF SERVICE WILL COMMENCE UPON EXECUTION OF CONTRACT FOR A PERIOD OF FIVE (5) YEARS, WITH ONE (1) ADDITIONAL TERM OF UP TO THREE (3) YEARS

AGENCY: INFORMATION TECHNOLOGIES DIVISION

BASIS OF AWARD: HIGHEST SCORING RESPONSIVE, RESPONSIBLE BIDDER BASED ON THE EVALUATION CRITERIA

NUMBER OF BIDS INVITED: 34 **NUMBER RECEIVED:** 2 **OTHER:** 1

SUMMARY OF BIDS AND RECOMMENDED ACTIONS:
Recommend approval to move forward to conduct On-Site or Virtual Software Demonstrations as outlined in Section 2.5.C.2 Evaluation of Responses with the two (2) highest scoring responsive, responsible contractors TT Faster LLC dba: Faster Asset Solution and Asset Works.

Below are the contractors with the following scoring ranking.

TT FASTER LLC dba: FASTER ASSET SOLUTION	92.84 points
ASSET WORKS	92.75 points

Attachments: Recommendation Memo, Bid Tabulation Sheet, Scoring Matrix, Terms and Conditions, Description of Services

Analyst: _____
RUBEN OLA

RESPECTFULLY SUBMITTED: _____
GREGORY PEASE, CHIEF
PROCUREMENT DIVISION

CONCURRENCE BY: Kenneth Lathrop, Chief of Information Technologies Division/CIO

(ALL AWARD ACTIONS SUBJECT TO LAWFULLY APPROPRIATED FUNDS)
ACTION OF CSPEC COMMITTEE ON RECOMMENDATIONS ABOVE

MEMBERS APPROVING _____ MEMBERS DISAPPROVING _____ DATE: _____

_____ _____ OTHER: _____

_____ _____

_____ _____

_____ _____

_____ _____

_____

ACTION OF AWARDING AUTHORITY DATE _____

APPROVED _____ DISAPPROVED _____

OTHER _____

SIGNATURE OF AUTHENTICATION _____

INFORMATION TECHNOLOGIES DIVISION

CITY OF JACKSONVILLE

DATE: April 29, 2021

TO: Greg Pease, Chief of Procurement Division

THRU: Kenneth Lathrop, Chief of Information Technologies / CIO Kenneth E. Lathrop Digitally signed by Kenneth E. Lathrop Date: 2021.04.29 13:35:09 -04'00'

FROM: Stephen Herczeg, GIS Manager Stephen Herczeg Digitally signed by Stephen Herczeg Date: 2021.04.29 09:20:55 -04'00'

SUBJECT: **ESC-0326-21 Fleet Management System Replacement**

The Information Technologies Division (ITD) received two (2) supplier bid responses and one (1) no bid from the City of Jacksonville, Procurement Division on March 17, 2021.

As outlined in the RFP, Section 2.5 - Evaluation of Responses, C.2 "The City of Jacksonville will short list no less than two, but no more than four responses for the On-Site or Virtual Software Demonstrations". The Evaluation Committee has completed their review and requests approval to move forward with an On-Site or Virtual Software Demonstration from the following two (2) responding suppliers.

1. TT FASTER LLC dba Faster Asset Solutions
2. AssetWorks LLC

Your favorable consideration of ITD's request is appreciated.

CC: Chris Tongol, Chief of Fleet Management Division
Erik Preacher, Fleet Management Administrator
Paul Freeman, Enterprise Applications Manager
Elizabeth Brown, IT Operations Manager
Thomas Ossi, Technology Contract and Records Manager

BID TABULATION SHEET

TITLE: FLEET MANAGEMENT SYSTEM REPLACEMENT BID NO: ESC-0326-21 OPEN DATE: 03/17/2021 PURCHASING ANALYST: RUBEN OLA NO. INVITED: (34) No. Received: (2) No Bids: (1) RECORDED BY: J. Hernandez, BID ANNOUNCER: R. Barnett		TT FASTER LLC dba FASTER ASSET SOLUTION	ASSET WORKS	
Item #1 - For an On Premise Solution, the Vendor shall provide a detailed breakdown for a minimum of two environments (UAT and Production)		$865,857.00	$854,124.00	
Item #2 - For a Hosted/SAAS Solution, the Vendor shall provide a detailed breakdown for a minimum of two environments (UAT and Production)		$1,022,550.00	$1,031,731.00	
	TOTAL PRICE	$1,888,407.00	$1,885,855.00	
ITEM NO.	DESCRIPTION (Attachment B-Evaluation Criteria)	POINTS		
1	COST: The proposer submitting the lowest cost to the City shall receive the maximum number of points for cost. Each sub-sequentially higher cost shall be divided into the lowest cost received and the products score % will be multiplied by the maximum points available to render the points. Score = ((Lowest Bid)Next Low Bid) X 30	30	29.96	30.00
2	REQUREMENT RESPONSE: All requirements will be evaluated and scored based on the contractor response and how the product is able to meet the requirements. Maximum of sixty (60) points	60	56.79	56.84
3	REFERENCES: Proposer submitted five (5) customer references where the proposer has successfully provided five (5) consecutive years of experience providing Fleet Management Software solutions. References should contain the following: Point of Contact, Phone Number, Address, Email Address, Description of Services Verified references will be awarded two (2) points each for a maximum of 10 points.	10	6.00	6.00
	Total Points	100	92.75	92.84
ITEM NO.	DESCRIPTION (Attachment B1-On-Site or Virtual Evaluation Criteria)	POINTS		
1	PRESENTATION: Implementor's overall presentation, knowledge and understanding of the solution.	15		
2	SYSTEM FUNCTIONALITY: Demonstrations of the end user proceeding through daily operations for vehicle repair and fleet management, to include but not limited to: work order entry, work order approval, workflow, warranty, recall, maintenance flags, sublet service entry, work order auditing, accounting functions (A/P and A/R), vehicle lifecycle analysis, vehicle replacement, asset tracking and out-of-box reporting.	35		

3	OVERALL EASE OF USE: Intuitiveness of the solution to the novice user, user friendliness of the system, and ease of navigation between applications and work processes.	30			
4	SYSTEM FLEXIBILITY: Ability for the City's systems administrator to make configuration changes to the system.	10			
5	REPORT CREATION: Ability to quickly produce ad-hoc or custom reports. Score = (Lowest Bid/The Bid) X 50	10			
	Total Points	100			
	GRAND TOTAL POINTS	200			
	Business/Corporate References:		✓	✓	
	Insurance Agent Acknowledgement Form:		✓	✓	
	Conflict of Interest:		✓	✓	
	Addendums (1,2,3):		1,2,3	1,2,3	
	COMMENTS:				

SCORING MATRIX - (B) (EVALUATION CRITERIA)

ESC-0326-21 FLEET MANAGEMENT SYSTEM REPLACEMENT

TOTAL POINTS	30 Points	60 Points	10	OVERALL	Rank
CRITERIA	COST: The proposer submitting the lowest cost to the City shall receive the maximum number of points for cost. Each sub-sequentially higher cost shall be divided into the lowest cost received and the products score % will be multiplied by the maximum points available to render the points. Score = ((Lowest Bid)Next Low Bid) X 30	REQUREMENT RESPONSE: All requirements will be evaluated and scored based on the contractor response and how the product is able to meet the requirements. Maximum of sixty (60) points	REFERENCES: Proposer submitted five (5) customer references where the proposer has successfully provided five (5) consecutive years of experience providing Fleet Management Software solutions. References should contain the following: Point of Contact, Phone Number, Address, Email Address, Description of Services Verified references will be awarded two (2) points each for a maximum of 10 points.	TOTAL POINTS (100)	
TT FASTER LLC dba FASTER ASSET SOLUTION					
Reviewer 1 (Cris Tongol)	29.96	58.25	6.00	94.21	
Reviewer 2 (Erik Preacher)	29.96	56.65	6.00	92.61	
Reviewer 3 (Steve Herczeg)	29.96	55.48	6.00	91.44	
Average	29.96	56.79	6.00	92.75	2.00
ASSET WORKS					
Reviewer 1 (Cris Tongol)	30.00	57.86	6.00	93.86	
Reviewer 2 (Erik Preacher)	30.00	58.06	6.00	94.06	
Reviewer 3 (Steve Herczeg)	30.00	54.60	6.00	90.60	
Average	30.00	56.84	6.00	92.84	1.00

SCORING MATRIX - (B-1) (ON-SITE OR VIRTUAL DEMONSTRATION EVALUATION CRITERIA)

ESC-0326-21 FLEET MANAGEMENT SYSTEM REPLACEMENT

Total Points	15 Points	35 Points	30	10 Points	10 Points	OVERALL	Rank
Criteria	PRESENTATION: Implementor's overall presentation, knowledge and understanding of the solution.	SYSTEM FUNCTIONALITY: Demonstrations of the end user proceeding through daily operations for vehicle repair and fleet management, to include but not limited to: work order entry, work order approval, workflow, warranty, recall, maintenance flags, sublet service entry, work order auditing, accounting functions (A/P and A/R), vehicle lifecycle analysis, vehicle replacement, asset tracking and out-of-box reporting.	OVERALL EASE OF USE: Intuitiveness of the solution to the novice user, user friendliness of the system, and ease of navigation between applications and work processes.	SYSTEM FLEXIBILITY: Ability for the City's systems administrator to make configuration changes to the system.	REPORT CREATION: Ability to quickly produce ad-hoc or custom reports. Score = (Lowest Bid/The Bid) X 50	Total Points (100)	
TT FASTER LLC dba FASTER ASSET SOLUTION							
Reviewer 1 (Insert name)							
Reviewer 2 (inset name)							
Reviewer 3 (Insert name)							
Average							
ASSET WORKS							
Reviewer 1 (Insert name)							
Reviewer 2 (inset name)							
Reviewer 3 (Insert name)							
Average							

REQUEST FOR PROPOSAL
FLEET MANAGEMENT SYSTEM REPLACEMENT
For
City of Jacksonville, Florida

1. SECTION 1 - SPECIFIC INFORMATION REGARDING THIS RFP

1.1 Introduction

The City of Jacksonville (**"Buyer or City"**) intends to hire one or more firms (**"Contractor, Consultant, Bidder or Recipient"**) to provide the services described in Section 1.2 of this Request for Proposal (**"RFP"**). Persons interested in submitting a response to this RFP (a **"Response"**) should carefully review this RFP for instructions on how to respond and for the applicable contractual terms. This RFP is divided into the following sections:

Section 1	Specific Information Regarding this RFP
Section 2	General Instructions
Section 3	General Terms and Conditions of Agreement
Section 4	Description of Services and Deliverables
Section 5	Exhibits
Attachment A	Response Format
Attachment B	Evaluation Criteria
Attachment B-1	On-Site or Virtual Demonstration Evaluation Criteria
Attachment C	Equal Business Opportunity Program Requirements
Attachment D	Services Contract
Attachment E	Disqualified/Probationary Vendor List
Attachment F	Indemnification
Attachment G	Insurance Requirements
Attachment H	Protest Procedures
Form 1	Price Sheet
Form 2	Conflict of Interest Certificate
Form 3	Insurance Agent Acknowledgment
Form 4	Business/Corporate References
Form 5	No Bid Form

In the event of conflicting provisions, the following sections of this RFP will have priority in the order listed: Section 1, Section 4, Section 2, Section 3, the Attachments, and the Forms.

1.2 Scope of Services

The City is requesting proposals to replace the current Fleet Management system with a new system. Fleet Management currently uses Tivoli.

The Fleet Management Division (Fleet) is responsible for motor vehicles and equipment owned or leased by the city and its independent agencies. The division performs preventative and regular maintenance and repairs, keeps detailed maintenance and service records, prepares replacement schedules, coordinates vehicle inventory and maintenance and ensures quality control of repair orders. It also coordinates the movement of vehicles, tracks usage and cost statistics on each vehicle, purchases new equipment, and manages the city's fueling operations.

The purpose of this document is to solicit proposals from qualified contractors in order to obtain a third party solution that replaces the current system, addresses the needs of Fleet Management and best fulfills the requirements detailed in this RFP document. The services provided by the selected contractor shall include implementation, post-implementation, maintenance and on-going support.

The new system will provide management of work orders, assets and parts & inventory. It will also enable scheduling and tracking vehicle repairs and preventative maintenance, billing and invoicing, remote user access and provide alerts and reporting capabilities. Please see Section 4 for a full description of the services and deliverables required under this RFP.

Current Environment

The current Fleet Management System (IBM Tivoli Asset Management) was implemented in 2009; there are approximately 179 users. In 2017, Fleet created 45,000 work orders, performed 8,700 preventative maintenance services, managed well over 3,000 assets and dispensed six million gallons of fuel. During the first half of 2018, Fleet purchased 551 new pieces of equipment.

1.3 Term of Agreement

The initial term of agreement will commence upon execution of the Contract and will continue for a period of five (5) years after the solution is fully implemented and accepted by the Buyer. Buyer will have the option, in its sole discretion, to renew for one (1) additional term of up to three (3) years. The Contract is subject to early termination as set forth elsewhere in this RFP.

1.4 Minimum Requirements for Providers

The Contractor must satisfy the following mandatory minimum requirements in order to have their Responses evaluated. By submitting an RFP, the Contractor warrants and represents that it satisfies these requirements. Failure to meet these requirements will result in the Response not being evaluated and being rejected as non-responsive:

1. Contractor must have the ability to obtain and maintain liability insurance as required by the City of Jacksonville and must submit with their response, a signed affidavit from their insurance provider stating they can provide all required coverage at the levels required by the RFP or a "FOR BID PURPOSES ONLY" certificate of insurance evidencing all coverages, limits and additional provisions as required by the RFP.

2.5 Evaluation of Responses

A. Buyer will determine the qualifications, interest and availability of Contractors by reviewing all Responses and, when deemed necessary in the sole discretion of Buyer, by conducting formal interviews of selected Contractors that are determined to be the best qualified based upon evaluation of the Responses.

B. The determination of which Contractors are "best qualified" will be based upon the criteria set forth in the RFP.

C. Buyer will employ the following process steps when evaluating which Contractors are "best qualified":

1) Buyer will evaluate Responses using the evaluation criteria set forth in the following table and in Attachment B.

Response Evaluation Category	Maximum Score
Cost	30
Ability to meet project requirements	60
References	10

2) Based on the scoring of the Response evaluations using the criteria above, Buyer intends to short-list no less than two (2) but not more than four (4) Contractors for On-Site or Virtual software demonstrations. Buyer reserves the right to conduct more or fewer software demonstrations at is sole discretion. Buyer will evaluate Contractor demonstrations using the evaluation criteria set forth in the following table and in Attachment B-1.

Demonstration	Maximum Score
Presentation	15
System Functionality	35
Overall Ease of Use	30
System Flexibility	10
Report Creation	10

3) Based on combined scores of the response evaluation and demonstrations, Buyer will select the highest rated Response and begin contract negotiations with the Implementation Services Provider and the Solution Provider.

4) If successful in negotiations, Buyer will move forward to award contracts per the guidelines outlined in Section 2.6.

D. Before making an award, Buyer reserves the right to seek clarifications, revisions, and information it deems necessary for the proper evaluation of Responses. Failure to provide any requested clarifications, revisions or information may result in rejection of the Response.

E. Buyer reserves the right to accept or reject any and all Responses, or separable portions thereof, and to waive any minor irregularity, technicality, or omission if Buyer determines that doing so will serve Buyer's best interests. Buyer may reject any Response not submitted in the manner specified by the RFP.

2.6 Award of Contract

A. The process for contract award is set forth in Jacksonville Ordinance Code Sections 126.204. Generally, Buyer will award the Contract to the responsible and responsive proposer whose Response is determined in writing to be the most advantageous to the City of Jacksonville, based solely on the relative importance assigned to price and of the criteria set forth in Attachment B. The award may be contingent on the outcome of direct negotiations under Section 126.201(d)(4) and 126.201(n), *Ordinance Code*. If an agreement cannot be reached with the highest ranked Contractor, Buyer reserves the right to make an award to the next highest ranked Contractor or subsequent Contractor(s) until an agreement is reached.

B. Buyer may make an award within sixty (60) days after the date of the Responses are due, during which period the Responses shall remain firm and shall not be withdrawn. Any Response that expresses a shorter duration may, in Buyer's sole discretion, be accepted or rejected. If award is not made within sixty (60) days, the Response shall remain firm until either the Contract is awarded or Buyer receives from Contractor written notice that the Response is withdrawn. [Note: Withdrawal of a Response may be requested within 72 hours (excluding State holidays, Saturdays and Sundays) after the date and time Responses are due. Buyer will not accept an amended Response after the date and time Responses are due.]

C. Except as may otherwise be expressly set forth in the RFP, Buyer intends to award one contract, but reserves the right to enter into a contract with multiple Contractors or to reject all Responses.

D. Based on the evaluation results, Buyer shall electronically post a notice of intended award at Buyer's website. Please contact the Contact Person if you are uncertain of Buyer's website address or if you experience problems accessing it. Any person who is adversely affected by the decision shall file with Buyer a notice of protest in accordance with the Protest provisions of the RFP. Buyer does not intend

2.7 Terms of Agreement

After award to the successful Contractor, Buyer and Contractor will promptly enter into a written agreement (the "Contract") incorporating the terms of the RFP, the successful Response, and other terms and conditions as may be agreed to between the parties. To the extent the Response contains exceptions to or modifications of the RFP, such exceptions or modifications are stricken unless Buyer affirmatively accepts the exceptions or modifications in the Contract. The Contract will be substantially in the form set forth in an attachment to the RFP. Buyer will not be obligated to pay Contractor for the RFP services until the Contract is signed by both parties. Buyer retains the right to reject all bids and/or amend its notice of award at any time prior to the full execution of the Contract.

If the successful Contractor fails to perform the Services as agreed, Buyer reserves the right to (i) issue a new solicitation for the Services; (ii) reopen the RFP for the purpose of negotiating and awarding a second contract to another Contractor in accordance with the criteria and processes set forth herein; and/or (iii) take such other actions permitted by law.

2.8 Public Meetings and Special Accommodations

Any meetings of the RFP evaluation committee (i.e., the Evaluation Committee), shall be noticed on Buyer's website and shall comply with Florida's Open Meetings Laws. Please contact the Contact Person if you are uncertain of Buyer's website address or if you experience problems accessing it. Persons requiring a special accommodation because of a disability should contact the Contact Person identified in Section 1 at least forty-eight (48) hours prior to the meeting.

4. SECTION 4 – DESCRIPTION OF SERVICES AND DELIVERABLES

The following areas have been identified as system and functional requirements. The contractor is responsible for becoming familiar with the Fleet business requirements to ensure the proposed system fully supports these requirements.

Section #	Requirement Category
4.1	Asset Management & Tracking
4.2	Parts & Inventory Management
4.3	Work Order Management
4.4	Preventative Maintenance Scheduling
4.5	General Requirements
4.6	Reporting
4.7	Search & Query
4.8	Accounting/Billing
4.9	Vendor Tracking
4.10	Warranty Requirements
4.11	Fuel Management
4.12	Equipment Planning, Budgeting & Availability Tracking
4.13	Vehicle Pool
4.14	System Administration & Configuration
4.15	Interfaces
4.16	User Portal
4.17	Disposal
4.18	Dashboard
4.19	Training & Support
4.20	Security
4.21	Technical Requirements
4.22	Performance & Business Continuity
4.23	Exit Strategy
4.24	Testing & Acceptance
4.25	Data Conversion
4.26	Implementation & Post-Implementation
4.27	Contractor Questionnaire
4.28	Glossary

Instructions

For each requirement:

If the requirement:	Insert the following in the *Response* column
Will be met with no customization	Y
Will not be met	N
Requires third party software*	T
Will be met with customization*	C

*Please provide details for those requirements that require third party software and those that require customization.

4.1. Asset Management & Tracking

Fleet is responsible for tracking all City owned mobile assets, which includes vehicles and various kinds of mobile equipment (such as forklifts). Assets are tracked from acquisition to disposal. The following requirements identify the type of information that must be recorded and tracked.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Asset Management & Tracking (AT)		
Number	**Requirement**	**Response (Y,N,T,C)**
AT 1	The solution must provide the ability to track assets from acquisition to disposal.	
AT 2	The solution must provide the ability to capture and track all pertinent data on each active, inactive, and sold piece of equipment including, but not limited to the following fields: • Asset Number • Year • Make • Model • VIN/Serial Number: unique number • License: unique number for license plate • APWA Code • Gross Vehicle Weight • Body Serial Number • Chassis Serial Number • Department • Division • Billing Code • Color • Vendor purchased from • Location address where asset is stored • Assigned Contact • Priority level of importance of the asset • Fuel Type • Main Meter (odometer/hour meter) • Auxiliary Meter • Group Code • Fuel tank capacity • Aux Fuel Tank Capacity • Main Engine Make, Model, Serial #, # Cylinder, Liters, Horsepower, Fuel Type • Aux Engine Make, Model, Serial #, # Cylinder, Liters, Horsepower, Fuel Type • Acquisition Date ex. 02/21/2016 • Acquisition Cost	

	• PO Number • Title • In Service Date • Life Expectancy Months • Out of Service Date • Disposal Date • Replaced Asset Number • Disposal Cost captured • Dispose Vendor • Sale Proceeds • Capitalized Cost	
AT 3	The solution must support an equipment-specific labor rate for automatically calculating labor cost for repairs (e.g. different labor repair costs for small, light, and heavy equipment).	
AT 4	The solution must provide easy access to *at-a-glance* snapshot information for a given asset including information such as most recent preventative maintenance (PM), meter reading, work order and lifecycle costing.	
AT 5	The solution must provide the ability to track multiple engines per vehicle. Example: A 70' boat may have four engines and each engine must be tracked.	
AT 6	The solution must provide asset lifecycle tracking including notification of when an asset is to be replaced.	
AT 7	The solution must track replacement history and link replacement assets to the assets replaced.	
AT 8	The solution must contain contacts to track anyone and everyone related to a piece of equipment with the ability to specify custom roles related to assets and start and end dates for their connection to the asset.	
AT 9	The solution must provide the ability to assign assets to an agency or authorized employee and track all pertinent information related to the assignment, such as agency name, employee name, assignment begin date, assignment end date, etc.	
AT 10	The solution must track asset history (such as date acquired, date assigned, purchase costs, repair history, etc.) and provide the ability to query historical information.	
AT 11	The solution must provide the ability to define availability of each individual asset by hours and days.	
AT 12	The solution must provide the ability to create user-defined asset/equipment usage codes.	
AT 13	The solution must provide the ability to attach components to an asset, while maintaining full asset records, warranties and PM schedules for each. Example: A tractor can have multiple attachments such as an auger, a bucket, a forklift, etc. The solution must allow Fleet to capture and track all the information for each attachment (component/asset record, warranty, PM schedule, etc.) as well as the tractor.	

AT 14	The solution must provide the ability to enter and track notes /comments related to assets that include searchable content such as subject lines.	
AT 15	The solution must provide the ability to correct/change an asset number and maintain all relevant data with the record.	
AT 16	The solution must provide the ability to track multiple meter types and provide the ability to capture the following meter readings including, but not limited to: • Actual Meter Reading • Meter Reading at Acquisition • Life Expectancy by Months / Hours • Year to Date • Life to Date • Etc.	

4.2. Parts & Inventory Management

Currently most Parts and Inventory Management is outsourced. Some items that are needed regularly in the shop areas (such as oil) are stocked in-house. The solution must have the necessary functionality to perform these functions whether they are performed internally or continue to be outsourced.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Parts & Inventory Management (PTS)		
Number	**Description**	**Response (Y,N,T,C)**

PTS 1	The solution must maintain all pertinent data on each part in inventory including, but not limited to, the following data:
	• Part Number
	• Part Description
	• In Stock Quantity
	• Item Cost
	• Capitalized Cost
	• Issue Details (examples: Asset #, Quantity, Work Order #)
	• Last Issue to Work Order date
	• Part Category or classification
	• Part Type or distinct usage
	• Part Status
	• % Mark Up for the individual part
	• Location
	• Alternate Location
	• Vendor Name
	• Substitute Part(s)
	• Stock Quantities for max, low and safe
	• Reorder Point
	• Order Lead Time
	• Mean Time Between Failure
	• Auto Order
	• Last Receipt
	  ○ Invoice
	  ○ Date Received
	  ○ Quantity	

PTS 2	The solution must provide a fully functional Parts Inventory and Management module.	
PTS 3	The solution must provide an audit trail of all system transactions. All data changes must be date/time stamped and the User ID that made the changes must be captured. System transactions that must be tracked include, but are not limited to, changes to the following: • Unit cost	

	• Count • Return to inventory • Return to vendor • Deleted orders • Deleted receipts • Transfers among warehouses/storerooms	
PTS 4	The solution must track purchases by: • Vendor • Vendor Invoice • Date • Work Order Number • Purchase Order Number • Part Number • Description • Etc.	
PTS 5	The solution must track parts in multiple storerooms.	
PTS 6	The solution must allow the transfer of inventory among storerooms.	
PTS 7	The solution must provide the ability to track all parts warranties.	
PTS 8	The solution must allow the user to view parts that are located in: • One storeroom • All storerooms • Specific storerooms	
PTS 9	The solution must provide the ability to track and report replacement parts and components by Original Equipment Manufacturer (OEM) and by OEM equivalent part number.	
PTS 10	The solution must automatically post the parts issued, with associated cost, to the work order.	
PTS 11	The solution must provide the ability to charge parts to a work order and to a department.	
PTS 12	The solution must provide the ability for the user (with proper security access) to markup the price of parts by a user-defined percentage.	
PTS 13	The solution must allow the user (with proper security access) to manually input inventory count.	
PTS 14	The solution must compare the manually input inventory count to the system inventory count and identify any discrepancies.	
PTS 15	The solution must include bar code system functionality to be used for receiving parts, issuing parts and inventory control.	
PTS 16	The solution must allow the user to enter notes for each part. The note field should be free-form text and must contain a subject line to aide in searching/querying.	

PTS 17	The solution must contain a comprehensive parts tracking module which includes, but is not limited to, the following functionality: • Recording all parts • Ordering • Receiving • Returning • Transferring • Adjusting	
PTS 18	The solution must allow the user to obtain a snapshot of inventory for any given date and time.	
PTS 19	The solution must provide the following inventory methods for the pricing of individual parts: • First-In First-Out (FIFO) • Averaging • Last-In First-Out (LIFO)	
PTS 20	The solution must allow the user to track part repair history and track trends by: • Part Issues • Notes • Work Orders	
PTS 21	The solution must allow the user to easily and quickly view the following part information: • Number In stock • Number in return bins • Number available • Number on order • Price • Markup • Last issue date • Last receipt date • Activity over the last 12 months • Etc.	
PTS 22	The solution must provide functionality that allows the user to: • Cross-reference different vendor part numbers for a given part • Find acceptable substitutes for a given part	
PTS 23	The solution must allow the user to order, receive and issue a part on a work order from a single screen.	
PTS 24	The solution must provide comprehensive searching capability to allow fast onscreen viewing of data, including but not limited to, the following information: a) Vendor b) Part Number c) Part Name d) Part Description e) Part Category	

	f) Part Type g) Default Vendor h) Part Notes i) Part Usage j) Part Status k) Cost	
PTS 25	The solution must allow users to access the part record (view the part detail) by selecting the part.	
PTS 26	The solution must provide the ability to differentiate between a stocked or non-stocked part record.	
PTS 27	The solution must provide the ability to track the issuance of all stocked and non-stocked parts to a specific piece of equipment.	
PTS 28	The solution must allow users to view (online) all system transactions (history) by part. Transactions must include, but are not limited to, the following: a) Issues b) Returned (Number Returned and Date Returned) c) Received (Number Received and Date Received) d) Received Returned e) Transferred In (Number Transferred In and Date Transferred In) f) Transferred Out (Number Transferred Out and Date Transferred Out) g) Adjusted Up (Number Adjusted Up and Date Adjusted Up) h) Adjusted Down (Number Adjusted Down and Date Adjusted Down) i) End-of-Period Quantity j) Costs (Unit, Shipping, Extended Cost by Month or by Year)	
PTS 29	The solution must allow the user (with proper security access) to change a part number. The change must be captured and reflected in the part history.	
PTS 30	The solution must provide functionality that enables the user to merge part records into one part number while retaining historical data.	
PTS 31	The solution must provide an option to track warranty and receipt information for non-stocked parts' issues.	
PTS 32	The solution must track all credits to vendors by: • Purchase Order Number • Invoice Number • Work Order • Date • Type • Description	
PTS 33	The solution must provide the ability for the user to create, modify, store and print lists identifying the parts required/used for specific repairs. Each list must specify the following: • Equipment number • Year	

	• Make • Model • Class	
PTS 34	The solution must have the ability to track core parts.	
PTS 35	The solution must: a) Provide the functionality for the user to track the storage locations of every item in inventory. b) Be capable of supporting an unlimited number of alternate locations for every inventory item.	
PTS 36	The solution must provide for the automated calculation of minimum and maximum inventory levels and provide recommended order quantities.	
PTS 37	The solution must display an alternate location's inventory level when: a) There isn't sufficient on-hand quantity to fulfill the request or b) The present location does not stock the requested part	
PTS 38	The solution must allow for the cross referencing of multiple part/item numbers to a main part/item number.	
PTS 39	The solution must provide the ability to print bar code labels for bins and parts.	

4.3 Work Order Management

Fleet work orders are created for vehicle/equipment services and repairs completed on site by Fleet personnel as well as offsite by Fleet contracted vendors. Data from the work orders is imperative to the customer billing and invoicing processes.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Work Order Management		
Number	**Description**	**Response (Y,N,T,C)**
WO 1	The solution must provide the ability to configure work orders to capture data based on the business needs required by fleet management processes.	
WO 2	The solution must provide the ability to create/configure work orders statuses. Examples: Approved, Complete, Release Billing, Waiting for Material, Hold, etc.	
WO 3	The solution must provide the ability to allow work orders to be created upon request (i.e. as needed).	
WO 4	The solution must track vehicle/equipment preventative maintenance status (PM status) and alert Fleet personnel when a vehicle is due for PM servicing.	

WO 5	The solution must provide the ability to automatically generate work orders from invoices from file formats such as csv, xls, xlsx, etc.	
WO 6	The solution must capture and identify preventative maintenance services and other applicable repairs on work orders that have been generated from an invoice.	
WO 7	The solution must provide the ability to create a work order using a single screen (i.e. the user does not have to navigate through multiple screens and tabs to enter the required information).	
WO 8	The solution must generate unique work order numbers and prevent the creation of duplicate work orders.	
WO 9	The solution must provide the ability to capture pertinent information on the work order relative to fleet management. Such information includes but is not limited to: • agency receiving the service • repair shop • agency account information • parts required • equipment requirements • etc.	
WO 10	The solution must provide "real-time" work in progress dashboards/screens that display data such as work order statuses, assigned tasks, location of work, assigned labor, etc.	
WO 11	The solution must have the ability to capture preventative maintenance (PM) services, other repairs, external vendors and miscellaneous costs/credits on a single work order.	
WO 12	The solution must provide the ability to automatically change work order status based on actions taken per business rules.	
WO 13	The solution must provide the ability for authorized personnel to manually change work order status per business rules.	
WO 14	The solution must provide alerts to notify Fleet personnel of any active warranties, required preventative maintenance (PM) or recalls for vehicles/equipment and any associated component(s) when a work order is opened.	
WO 15	The solution must provide the ability to display all active warranties and PM due messages for vehicles/equipment and associated component(s).	
WO 16	The solution must provide the ability to set estimated completion dates/deadlines and capability to provide automated updates to requestors if desired.	
WO 17	The solution must have the ability to use wild cards to complete work order searches. Example: The user enters a portion of a name and the system provides the ability to select from a list of work orders meeting the wild card criteria.	
WO 18	When generating a new work order, the solution must have the ability to identify previously ordered parts that have not been installed on a vehicle/equipment to prevent duplicate orders.	

WO 19	The solution must provide the ability to capture and track pertinent work order data. Data to be tracked include but is not limited to: cost, labor hours, downtime, materials, etc.	
WO 20	The solution must have the ability to assign work orders to external contractors and vendors with the ability to track the associated costs for these services.	
WO 21	The solution must have the ability to capture information about each employee assigned to a work order such as employee name, employee number, labor hours, total hours worked, etc.	
WO 22	The solution must have the ability to calculate and track total hours and total costs charged to a work order.	
WO 23	The solution must perform edits and validations as required based on business rules. Example: The system must prevent a vehicle from inadvertently being assigned to another agency when it has already been assigned.	
WO 24	The solution must provide the ability to archive and retrieve detail work order, historical repair data for the life of the vehicle/equipment.	
WO 25	The solution must provide the ability to cancel work orders, and if parts or labor costs have been charged to the work order, must have the ability to adjust or reverse charges.	
WO 26	The solution must maintain an audit trail of any work order cancellations or adjustments.	
WO 27	The solution must provide the ability to configure and maintain selection data relative to fleet management such as repair codes, repair reason codes, etc.	
WO 28	The solution must provide the ability to configure fee structures per business rules including service costs, mark ups, etc.	
WO 29	The solution must provide the ability to select the appropriate repair code/repair reason for each work order. Examples of repair reasons include: Modification, Warranty, Recall, Preventative Maintenance, etc.	
WO 30	The solution must have the ability to track multiple repair reasons per work order. Summary reporting of these reasons must also be provided.	
WO 31	The solution must have the ability to require specific authorization for finalizing a work order.	
WO 32	The solution must have the ability to require specific authorization for reopening a finalized closed work order.	
WO 33	The solution must allow the addition of authorized user defined costs to the work order including description and mark ups.	
WO 34	The solution must track modification to work order costs including who made the modifications, date/timestamp, modification reason, etc.	

WO 35	The solution must provide the ability to enter and update a narrative, such as a complaint, cause and correction section, on each work order.	
WO 36	The solution must provide the ability to utilize industry standard repair work coding scheme, such as Vehicle Maintenance Report Standards (VMRS) codes and/or in house defined codes.	
WO 37	The solution must provide the ability to capture rework (when repeat repairs occur) based upon user-defined criteria, and automatically notify the user of repeat repairs when creating the work order.	
WO 38	The solution must provide the ability to capture time when equipment is available for operational use (for uptime/downtime calculation) based upon user-defined criteria.	
WO 39	The solution must have the ability to automatically add a flat administrative fee to each work order.	
WO 40	The solution must prevent a user from closing a work order with incomplete associated task checklists.	
WO 41	The solution must provide the ability to identify scheduled versus unscheduled downtime.	
WO 42	The solution must provide the ability to markup labor costs at a rate based on vehicle or equipment category. Labor rates must have effective beginning and end dates.	
WO 43	The solution must have the ability to create, print and maintain repair cost estimates prior to performing the work.	
WO 44	The solution must provide the ability to calculate and print or email repair estimates for customers.	
WO 45	When opening a work order, the solution must have the ability to flag a unit that is scheduled for replacement to avoid spending time on units scheduled for replacement.	
WO 46	The solution must have the ability to set an optional warning flag to appear when a job for a warrantable item is added to a work order.	
WO 47	The solution must have the ability to set a flag when the replacement part is under warranty.	
WO 48	The solution must have the ability to identify the primary equipment as in or out of service.	
WO 49	The solution must have the ability to display all work orders by user defined search parameters. Information to be displayed includes but is not limited to: • Date and time opened • Date and time closed • Meter reading • Location • Unit number • Work order number • Job code user defined and/or VMRS • Job description with detailed cause, complaint, and correction narrative or code	

	• Job status • Scheduled/unscheduled (target and non-target) • Warranty – work unit – technician – class code	
WO 50	The solution must provide the ability to search and filter on work order data fields including but not limited to: • Equipment ID • Location • Job code user defined and/or VMRS • Work order status • Reason for visit • Work order number • Repair cause code- job description with detailed cause, complaint, and • correction narrative • Job status • Scheduled/unscheduled (target and non-target) • Warranty • Work unit – technician – class code	
WO 51	The solution must provide the ability to allow charges to be made to finalized work orders with appropriate rights.	
WO 52	The solution must maintain audit trails for all charges to finalized work orders.	
WO 53	The solution must have the ability to charge commercial costs back to a work order.	
WO 54	The solution must provide the ability to separate commercial parts and labor from in house maintenance costs.	
WO 55	The solution must include technology that allows vendor invoice numbers to be reused on a different work order when it is not a duplicate service charge. Example: After a period of time (sometimes as little as a year), some vendors reuse the same vendor number. The system must allow this new invoice (that may repeat the number from a previous invoice issued by this vendor) to be associated with a new work order.	
WO 56	The solution must provide the ability to display a detailed equipment maintenance history with user defined search parameters that include, but are not limited to: • Work order status • Job code user defined and/or VMRS • Repair reason (cause code) • Maintenance location • Assigned location • Technician • Agency or Department	
WO 57	The solution must have the ability to view online all work in progress and work completed for the day.	

WO 58	The solution must provide the ability to identify and capture parts, labor for tasks, etc. for services rendered without specific unit information to calculate respective costs (e.g. overhead, etc.) for these jobs. Example: The system provides the ability to charge a public safety agency for repairs completed on an inflatable boat.	
WO 59	The solution must provide the ability to calculate employee and shop productivity.	
WO 60	The solution must provide the ability to determine shop staffing needs e.g., vehicle equivalency analysis.	
WO 61	The solution must provide the ability to create a shop / technician planning and scheduling program.	
WO 62	The solution must provide the ability to display future inspection intervals (state inspection, emission inspection, etc.)	
WO 63	The solution must provide the ability to allow the user to select any or all open work requests as jobs on the work order.	
WO 64	The solution must provide the ability to generate a current labor display. This display should show all active employees and the specific task they are currently performing.	
WO 65	The solution must provide the ability to track and defer non-safety repairs (e.g. defective armrest, air conditioning, rip in seat etc. versus brakes, headlights, horn etc.) and not show the vehicle or equipment as out of service.	
WO 66	The solution must provide a process to notify personnel when back-ordered parts are received.	
WO 67	The solution must provide the ability to automatically notify the customer via email when the equipment is ready for pick up.	
WO 68	The solution must provide the ability to allow a work order to have a credit balance.	
WO 69	The solution must provide the ability to record all commercial or external vendor repairs to enable analysis by cause and repair code.	
WO 70	The solution must provide the ability to view all work orders online in real time by status.	
WO 71	The solution must provide the ability to provide a real time single screen review of the direct/indirect labor activities for all logged on technicians.	
WO 72	The solution must provide the ability to defer repairs and automatically include them on the next opened work order for that piece of equipment.	
WO 73	The solution must provide the ability to assign deferred repairs to a specific technician and/or shop. Note: See Exhibit 5.4 for a list of on-site fleet shops.	
WO 74	The solution must provide the ability to track service process procedures to a specific repair for a specific piece of equipment.	

WO 75	The solution must provide the ability to create work order or direct charge documents to capture billing that relates to a cost center of an asset.	
WO 76	The solution must provide the ability to charge labor hours using flat rate labor charges.	
WO 77	The solution must provide the ability to manage vehicle/equipment recall campaigns.	
WO 78	The solution must provide the ability to configure an automatic log off after the system has been idle for a specified period of time. The solution must allow the automatic log off time to be defined by authorized Fleet personnel / system administrator.	
WO 79	The solution must provide a Labor planning calendar that displays pertinent information such as scheduled tasks, scheduled indirect labor, online request and certificates.	
WO 80	The solution must have the ability to track and manage all technician time, including non-billable labor hours.	
WO 81	The solution must have the ability to track repairs in real-time.	
WO 82	The solution must provide the ability for the technician to add work order notes from the technician workstation screen.	
WO 83	The solution must provide the ability to track staff training and certifications.	
WO 84	The solution must provide the ability for technicians to navigate easily among work orders. This will enable them to easily track work-in-progress.	
WO 85	The solution must contain a customer portal that automatically sends alerts and notifications to customers.	
WO 86	The solution must have the ability for customers to request repairs for equipment online.	
WO 87	The solution must provide the ability for customers to review repair history of their vehicles.	
WO 88	The solution must provide workflow functionality to route and process work orders.	
WO 89	The solution must assign routing (workflow) based on the information entered on the work order.	
WO 90	At fiscal year end, the solution must allow open work orders with pending charges to remain open and to be carried over into the next fiscal year.	

4.4 Preventative Maintenance Scheduling

The following section identifies the requirements for creating, scheduling and tracking recurring preventative maintenance activities.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Preventative Maintenance Scheduling (PM)		
Number	**Description**	**Response (Y,N,T,C)**
PM 1	The solution must provide the ability to create, schedule, and track the status of recurring preventative maintenance (PM) activities such as safety checkpoints, parts, materials, frequencies/service intervals, and estimated/actual time spent on these activities.	
PM 2	The solution must provide the ability to track all scheduled maintenance.	
PM 3	The solution must provide the ability to generate recurring maintenance schedules on a daily, weekly, monthly, quarterly or annual basis. In addition, it must be capable of defining customized intervals on a user-defined basis.	
PM 4	The solution must provide the ability to track equipment information, including but not limited to: • Manufacturer • Model • Serial Number • Service Dates • Warranty Expiration Dates	
PM 5	The solution must provide the ability to maintain PM historical information on assets and equipment for the lifecycle of the vehicle.	
PM 6	The solution must: a) Provide the ability for the user to schedule planned maintenance activities based on mileage, specific dates, days of the week, days of the month, etc. b) Allow Fleet personnel to modify scheduled planned maintenance as necessary. Example: Safety inspections should be scheduled at 9,000 miles or 6 months, whichever occurs first.	
PM 7	<u>Alerts</u> The solution must: a) Provide alerts to notify the user when scheduled maintenance/service is due. Examples: - An alert would notify the user when maintenance is due on a vehicle - An alert would be displayed when the system user opens a work order for a vehicle for which maintenance is due. b) Provide recall alerts. c) Allow the user to add the preventative maintenance job to an existing work order	

	or to create a new work order. d) Automatically satisfy the alert and automatically update the scheduled maintenance calendar when the preventative maintenance job is complete. e) Provide alerts to notify the user when a warranty is in effect or near the expiration date.	
PM 8	The solution must allow for out-of-cycle PM (performing PM early or late) such as preparing a vehicle for a trip or completing PMs that are missed. Audit functions shall identify any PM performed out-of-cycle.	
PM 9	The solution must provide the ability to perform batch operations (such as oil changes) on selected individuals or groups of PM schedules.	
PM 10	The solution must provide the ability to track detailed task activities (checklist) within individual or groups of PM work orders.	

4.5 General Requirements

The following section identifies the general requirements needed in the Fleet Management system.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

General Requirements (GEN)		
Number	**Description**	**Response (Y,N,T,C)**
GEN 1	The solution must be ADA compliant per Section 508 of the Rehabilitation Act of 1973.	
GEN 2	The solution must provide a consistent look and feel across all modules.	
GEN 3	The solution must provide a user-friendly intuitive design for ease of use and navigation.	
GEN 4	The solution must provide a fully integrated solution, which avoids redundant data entry.	
GEN 5	The solution must provide the ability to integrate with standard Microsoft Office products such as MS Word, MS Excel, MS Access, MS Outlook, and Office 365.	
GEN 6	The solution must include all support software, tools, and utilities (e.g., text editors, library products, manuals, code generators, scripts) needed to perform configuration, operation and management tasks.	
GEN 7	The solution must provide a variety of help features including but not limited to the following: • Spell Check • Grammar Check • Mail Merge • Help Functionality	

GEN 8	The solution must allow users to add and/or update words to the spell check dictionary.	
GEN 9	All free-form fields must allow continuous typing without hard returns (word wrap feature).	
GEN 10	The solution must allow multiple forms of navigation including, mouse, keyboard, touch screen (for tablets), tab, programmed key, icon, etc.	
GEN 11	The solution must provide the ability to capture data based on Fleet's business rules.	
GEN 12	The solution must allow authorized personnel to manually override a business rule.	
GEN 13	The solution must store data in formats that make it easily retrievable. Example: Store Manufacturer in a separate field from Model so that Model is searchable.	
GEN 14	The solution must provide the ability for authorized users to create user-defined fields.	
GEN 15	The solution must provide drilldown capability to related records. Example: When viewing information about a vehicle, the user must be able to navigate to all work orders pertaining to that vehicle.	
GEN 16	The solution must provide the ability to configure and track various types of statuses based on business rules. Examples: • Approved • Completed • In Progress • Etc.	
GEN 17	The solution must provide the ability to update statuses based on business rules. Example: Statuses may update automatically based on an action or they may be updated manually.	
GEN 18	The solution must provide the ability for the user to select a method of receiving notifications (e.g., email, text, etc.).	
GEN 19	The solution must provide the ability to establish and track Service Level Agreements (SLAs) based on business rules. Example: Allow Fleet to establish a period of time to complete a task and trigger notifications/alerts for overdue tasks.	
GEN 20	The solution must provide the ability to save and print a system generated document and reprint it with its original values.	
GEN 21	The solution must provide the ability for users to create and scan barcode labels for parts, work orders, assets, storage locations (bins), etc.	
GEN 22	The solution must allow users (with proper security access) to remotely access the system.	

GEN 23	The solution must have the ability to work with and capture results from auxiliary devices such as bar code scanners, digital signature devices, tablets, etc. The solution must allow the captured results to be attached to the work order. Example: The technician should have the ability to capture his/her notes on a tablet device while in the vehicle/equipment. The supervisor should have the same ability to capture his/her notes while in the office.	
GEN 24	The solution must automatically adjust the screen image to the size of the device (e.g., mobile devices and tablets). This is sometimes referred to as "responsive design".	
GEN 25	The solution must provide the ability to capture/accept electronic signatures.	
GEN 26	The solution must allow the user to override or manually enter data if auxiliary devices (such as bar code scanners or signature pads) are off-line.	
GEN 27	The solution must have the ability to recognize local and remote updates in real-time.	
GEN 28	The solution must automatically record transactions that do not end successfully.	
GEN 29	The solution must alert the user when a transaction does not end successfully.	
GEN 30	The solution must allow authorized users access to information archived from prior fiscal years.	
GEN 31	The solution must prevent the deletion of data (records) based on business rules.	
GEN 32	The solution must allow or prevent the deletion of supporting documentation based on business rules.	
GEN 33	The solution must provide the ability to access the history of all activities pertaining to a work order.	
GEN 34	The solution must provide an audit trail of all system transactions. The audit information must be easily retrievable by the system administrator.	
GEN 35	The solution must date/time stamp all changes to data fields and identify the User ID that made the change (audit trail).	
GEN 36	The solution must display the last date and time each user logged onto system.	
GEN 37	The solution must record or capture information about each unauthorized access attempt such as User ID, workstation, date and time.	
GEN 38	That solution must allow the user to manage batch submission of reports or jobs. This functionality should permit the user to schedule when the request should be executed, to choose whether to view results on the screen or to print the results, and to manage printing of the report.	
GEN 39	The solution must provide the ability for the user to track the following by department and vehicle: • Number of Accidents and associated costs • Number of Incidents and associated costs	

GEN 40	The solution must provide the ability for the user to forecast and prepare an annual operating budget using historical data (cost of fuel, parts, labor, overhead etc.)	
GEN 41	The solution must have the ability to maintain an equipment list with details of permanent or removable components.	
GEN 42	The solution must have the ability to list the detailed history of equipment costs by month and year, including all costs broken out by accidents, maintenance, fuel, other fluid quantities, miles per gallon, and cost per mile calculations.	
GEN 43	The solution must allow users, with appropriate authority, to configure and edit workflow tasks and checklists by discipline.	
GEN 44	The system must be designed specifically for use by government entities and have been implemented in a government entity.	
Upload Attachments		
GEN 45	The solution must provide the ability to upload attachments/documentation including pictures and media of various sizes and types.	
GEN 46	The solution must link uploaded information to the applicable source (e.g. work order).	
GEN 47	The solution must provide the ability to delete (remove) attachments based on defined business rules.	
GEN 48	The solution must provide the ability to print all attachments or choose the desired attachments to print.	

4.6 Reporting

Querying/Searching and reporting options must be provided in order to report on day-to-day transactions, historical information, key performance indicators and other required metrics. The user must have the option of creating ad hoc reports as well as utilizing canned reports. See Exhibit 5.2 for examples of current reports used by Fleet.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Reporting (REP)		
Number	**Description**	**Response (Y,N,T,C)**
REP 1	The solution must provide a set of standard (canned) queries and reports that are common to governmental fleet management.	
REP 2	The solution must provide intuitive and robust reporting capabilities based on governmental fleet industry standards and best business practices.	
REP 3	The solution must allow users to search by data field(s), select the information to be displayed and produce a report in a specific layout. Examples: • Search by department/customer and display all vehicles that are Out-of-Service. • Search by vehicle information (year, make, model, and/or acquired date) and choose to display the number of accidents/incidents in which those vehicles have been involved.	
REP 4	The solution must provide the ability to configure data queries and ad-hoc reports using key data elements maintained within the system. Examples: • Query and report on the number of work orders that are not completed. • Query and report on the number of work orders that were completed during a specified time.	
REP 5	The solution must allow wild card searches by all key data fields. Examples: • Vehicle Number • Purchase Order Number • Etc.	
REP 6	The solution must provide the ability to obtain metrics and calculations. Examples: • Number of windshield replacements due to accidents versus vandalism during a specific time. • Number of work orders created annually • Etc.	

REP 7	The solution must provide the ability to create custom reports that can be saved and reused.	
REP 8	The solution must provide the ability to report on key data elements in the system and provide drill down capabilities.	
REP 9	The solution must provide the ability to create and maintain form/document templates for internal use and supplemental customer support.	
REP 10	The solution must provide the ability to create and maintain form/document templates for system generated notifications such as emails and letters to internal (customers) and external (vendors) users.	
REP 11	The solution must enable the user to tailor standard reports. Examples of tailoring a report include, but are not limited to, the following: • Specifying sort or filter criteria • Adding or removing columns • Providing an option to print details & summaries • Providing an option to save for reuse	
REP 12	The solution must provide the ability to review/research activity trending. Examples: • Determine length of time required to replace an alternator. • Determine if the length of time required to replace an alternator has changed over the last year.	
REP 13	The solution must allow the user to create a report that identifies preventative maintenance that is: - due - overdue and - completed within a specified date range.	
REP 14	The solution must provide the ability for the user to: a) Review/research activity trending b) Perform trend analysis	
The following reports are required by Fleet Management. The solution must provide them as canned reports or allow them to be generated as ad hoc reports.		
REP 15	The solution must allow the user to create a report that identifies the vehicles and equipment that are out-of-service due to incomplete repairs *(that affect the safe operation of the equipment).* Note: The user must be able to exclude the vehicles and equipment that have deferred maintenance that does not affect the safe operation of the equipment.	
REP 16	The solution must allow the user to create a report listing all open work orders within a specified date range.	

REP 17	The solution must allow the user to create a Surplus Parts Report that tracks lack-of-activity for user-defined periods of time.	
REP 18	The solution must provide the ability for the user to generate accident and damage repairs report by vehicle/equipment number and fiscal year.	
REP 19	The solution must provide the ability to generate a Warranty Repairs report.	
REP 20	The solution must have the ability to identify: a) Completed PMs b) PMs due During a specified date range and specified variances.	
REP 21	The solution must have the ability to maintain a report that lists basic work order information including total dollars, and total hours open for each work order with a summary count of work orders for each repair type reason.	
REP 22	The solution must have the ability to create a report that lists utilization by specified meter within a timeframe by vehicle/equipment, class, and/or department.	
REP 23	The solution must have the ability to provide a list of outside work performed with labor hours and cost totals for each vendor.	
REP 24	The solution must have the ability to provide totals by technician and shop for direct, indirect labor hours, total labor hours, costs, number of vehicles, and work orders, and provide a chart depicting direct vs. indirect labor hours by repair descriptions.	
REP 25	The solution must allow the user to create a list of all receipts by vendor for: a) All parts b) A category of parts c) Specific part numbers	
REP 26	The solution must provide the functionality that allows for the creation of a report that identifies transactions that "errored out" or did not successfully transmit from the parts provider (currently The Parts House) to the new system.	
Additional Reporting Requirements		
REP 27	The solution must allow users to create reports that are currently produced and required. Examples of required reports include, but are not limited to, the following: • Cost Per Mile (CPM) • Annual Mileage Per Vehicle • Average Age of Fleet • Average Miles Per Gallon • Average Maintenance Cost per Vehicle Class	
REP 28	The solution must provide the ability to print reports and search result lists.	

REP 29	The solution must provide the ability to export report and search results with the ability to distribute in various formats (e.g. pdf, xlsx, csv, etc.).	
REP 30	The solution must provide sortable columns in search result lists. Example: Date fields sort chronologically in ascending and descending order.	
REP 31	The solution must provide reporting scalability options including the ability to filter report results.	
REP 32	The solution must allow agencies external to Fleet to search for information and reports based on user role.	
REP 33	The solution must provide the ability to configure and schedule automatic report distribution. Example: Reports may be distributed by user, department/division, frequency, and distribution method.	
REP 34	The solution must display the total number of records found in a query result set.	
REP 35	The solution must provide the following pagination properties in a query result set: • number of pages • one-click navigation to the first • one-click navigation to last page • next and previous pages	
REP 36	The solution must allow the user to create custom reports that can be saved and re-used.	
REP 37	The solution must have the ability to list assets in need of replacement and project costs with the ability to choose whether to show an asset's children. This should include year, make, model, department, and acquired date with ability to sort by license/unit number or alias.	
REP 38	The solution must allow users to easily create charts and graphs from data captured in the system. Example: Create a chart that depicts the number of scheduled repairs versus unscheduled repairs per customer by month for the past 12 months.	

REP 39	The solution must allow the user to create summary reports, charts and graphs.
	Examples include, but are not limited to:
	• A report that depicts the percentage of time that vehicles are available to users during a specified time. The report must be sortable by all the fields included on the report.
	• A chart/graph that depicts a summary of distribution of repairs for various repair type reasons by month
	• A report containing the following:
	  o Summary of the # of work orders by maintenance shop
	  o Number of preventative maintenance work orders by preventative maintenance Type
	  o Parts received and issued by storeroom for a specific date	

	• A chart/graph that depicts the number of repairs performed by month and associated reason codes. Fields may include Part #, Repair Reason Code, Number of Repairs, Month and Year.	
REP 40	The solution must have the ability to maintain a productivity percentage report comparing paid dollars vs. earned dollars for each technician showing cost to labor dollars percentage.	
REP 41	The solution must allow the user to create a billing report containing, at a minimum, the following fields: • Department • Account number • Vehicle • Operational/Fuel Costs & Total • Fixed Base Costs & Total • Replacement Costs & Total	
REP 42	The solution must capture all changes/deletions made to existing records (audit trail logs). At a minimum, the following information must be captured for every change/deletion: • Date & Time of the change • User that made the change • Original value • New value	
REP 43	The solution must allow users to create reports to identify all the changes and deletions made (audit trail).	
REP 44	The solution must allow the user to create a report depicting the average number of hours it has taken to complete a specific repair. Note: This information could be used to establish repair labor standards for the department.	
REP 45	The solution must allow the user to create a report that identifies equipment that has required repeat repairs within a specific time.	

4.7 Search & Query

The following section details the requirements surrounding searching and querying.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Search & Query (SQ)		
Number	**Description**	**Response (Y,N,T,C)**
SQ 1	The solution must provide the ability for users to search and/or query all fields in the system.	
SQ 2	The solution must have the ability to search by: • Keyword • Part of a keyword • Exact word	
SQ 3	The solution must allow the user to search using multiple search criteria such as part number, part description & work order number by themselves or some combination of part number, part description & work order number.	
SQ 4	The solution must allow users to search for: • All back orders • Orders not received • All orders received	

SQ 5

The solution must allow users to search by data field(s), select the information to be displayed and produce a report in a specific layout.

Example: A customer wants a list of all 2013 Chevrolet vehicles in ascending Model order. The report must contain the Year, Manufacturer, Model and Asset #.

Sample Data Fields (Parameters)	Search Criteria
Year	2013
Manufacturer	Chevrolet
Model	
Asset #	
Serial #	
Color	
Engine	
Vendor #	
Vendor Name	
Asset Tag	
Type	

Resulting Report			
Year	Manufacturer	Model	Asset #
2013	Chevrolet	Colorado	1058-20
2013	Chevrolet	Colorado	1058-14
2013	Chevrolet	Colorado	1030-00
2013	Chevrolet	Colorado	1182-20
2013	Chevrolet	Silverado	1042-65
2013	Chevrolet	Silverado	1040-82
2013	Chevrolet	Tahoe	1041-97
2013	Chevrolet	Tahoe	1085-52

SQ 6

The solution must allow the user to type in a single character or a string of characters, within any field that has a drop down table, and the solution must immediately place the cursor at that alphabetic location within the table. (e.g., in a drop-down list of states, the user types "Wa" and is taken directly to Washington).

Note: Sometimes this is referred to as autocomplete typing.

SQ 7

A customer must be able to search the system by pre-determined data fields (data fields configurable by the System Administrator) and the results of the search must be displayed to the customer online.

Example:
See example above in SQ5. Instead of a report, the search result would be displayed online.

SQ 8

The solution must provide functionality that allows users to search using a wildcard feature. This enables searches on partial field information.

SQ 9

The solution must provide functionality that allows users to search by "Soundex' (Example: Smyth versus Smith)

SQ 10

The search functionality must not be case sensitive.

SQ 11	The elements of the search results must be selectable and when selected must display the associated detail information (drill down capability on the search results). Example: When a user searches for all work orders in a Closed status, he/she must be able to select one of those work orders and the details of that work order will be displayed.	
SQ 12	The solution must provide functionality that allows the user to query on any field and for any data set that has been entered into the system, including comments.	
SQ 13	The solution must allow the user to save and/or archive searches or queries for future use.	
SQ 14	The solution must allow the user to execute a query interactively or to schedule the query.	
SQ 15	The solution must provide security functionality to control which users can perform queries.	
SQ 16	The solution must have the ability to provide the number of records searched and the number of records returned from a query.	
SQ 17	The solution must allow the extraction of search/query results into multiple formats including Word, Excel, PDF, etc.	
SQ 18	The solution must allow the user to subset a completed search and re-search the subset.	
SQ 19	For audit purposes, the solution must log the following information for all queries requested and responses provided: • User ID • Date and Time • Field • Values Requested • Results Returned	

4.8 Accounting/Billing

The following section identifies Fleet's accounting/billing requirements.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Accounting/Billing (ACC)		
Number	**Description**	**Response (Y,N,T,C)**
ACC 1	The solution must provide the ability to compare actual labor charges to flat rate charges.	
ACC 2	The solution must provide the ability to calculate cost of ownership by individual equipment.	
ACC 3	The solution must provide the ability to calculate cost of operations (such as fuel, parts, labor, insurance, etc.) by individual equipment ID.	
ACC 4	The solution must provide the ability to track shop operational and overhead costs vs. revenue.	
ACC 5	The solution must provide the ability for the user to generate income and expense reports by various parameters and combinations of parameters. Examples: - Vehicle/Equipment ID Number - Type of Repair - Type of Repair, Facility, Department, Division, Program - Etc.	
ACC 6	The solution must provide the ability to generate all income and expense reports by accounting period, year-to-date and life-to-date.	
ACC 7	The solution must provide the ability to calculate vehicle replacement based on user-defined criteria.	
ACC 8	The solution must provide the ability for the user to track contractual blanket orders and subsequent purchase orders.	
ACC 9	The solution must automatically update the system when payment has been received. Example: When an agency pays fleet for servicing the agency's vehicles, the system must be updated to indicate that payment has been received.	
ACC 10	The solution must receive payment updates from the city's financial system (currently Oracle Financials). Example: When fleet authorizes payment to outside vendors (for car washes, etc.) the system must be updated to indicate that the payment has been made.	
ACC 11	The solution must allow the user, with appropriate authority, to manually update the system when payment has been received.	

ACC 12	The solution must record and track blanket purchase order funds.	
ACC 13	The solution must provide the ability to receive manual invoices from vendors. Functionality must be available for Fleet to manually enter received invoices into the system.	
ACC 14	The solution must provide the ability to electronically receive invoices from vendors.	

ACC 15	The solution must provide the ability to charge, track and report on non-vehicular costs (direct bill).
	<u>Examples</u>
	• Credit must be applied when:
	  o COJ receives payment from an insurance company for an accident (accident reimbursement)
	  o Fleet personnel work on/repair a Fleet vehicle
	• Debit must be applied when a Fleet vehicle is used for a trip – the customer is charged for the fuel used and a daily charge (tripper charge)	

ACC 16	The solution must interface with a fuel control & reporting system (currently EJ Ward System) to allocate fuel expenses to the appropriate vehicle/equipment, per business rules.	
ACC 17	The solution must provide the ability to manage automatic notifications. Examples: • Allow authorized users to enable automatic email notifications to customers (automatically send emails to customers that have not paid for services Fleet provided). • Allow authorized users to prevent automatic emails to customers for late payments.	
ACC 18	The solution must generate unique authorization numbers for repairs provided by external vendors.	
ACC 19	The solution must provide the ability for the estimated repair cost to be updated with the actual repair cost when the actual cost is known. Note: This allows Fleet to track available funds without accessing the financial system.	
ACC 20	The solution must have the ability to generate a detailed billing report for each customer.	
Loan Fund		
ACC 21	The solution must track the amount that Fleet must charge agencies (charge back) for purchasing vehicles on their behalf.	
ACC 22	The solution must allow the user, with appropriate authority, to assign the following: • Interest rate • Period of Amortization (Term/number of months)	

ACC 23	The solution must calculate the monthly payment utilizing the cost of purchase, customization cost (up fitting) and interest rate to charge the agency a flat monthly payment using straight-line depreciation.	

4.9 Vendor Tracking

The following section identifies the vendor tracking requirements needed in the Fleet Management system.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Vendor Tracking (VEN)		
Number	**Description**	**Response (Y,N,T,C)**
VEN 1	The solution must provide the ability to track the activities of vendors performing work for the City and tied to city assets. Example: Maintenance services provided on Date X, related to equipment Y, at a cost of Z.	
VEN 2	The solution must have the ability to store contact information for vendors.	
VEN 3	The solution must allow authorized users to create vendor account profiles. Vendor account profile information will include, but not be limited to, business: • Name • Address • Telephone # • Email Address • Invoice Method Preference (receive invoices via Email, Fax, Paper) • Etc.	
VEN 4	The solution must allow authorized users to modify vendor account profiles. Example: Allow users to make modifications such as address changes. However, business rules may require the system to prevent users from deleting vendor profiles if any activity associated with it.	
VEN 5	The solution must track pertinent vendor information (based on business rules)	
VEN 6	The solution must provide the ability to generate and print a transaction history of all payments made to a vendor.	
VEN 7	The solution must provide the ability to generate template forms and emails using data from the system. Example: The solution can generate emails requesting payment to a vendor that includes vendor content previously entered in the system.	

4.10 Warranty Requirements

The following section identifies the warranty requirements needed in the Fleet system.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Warranty Requirements (WAR)		
Number	**Description**	**Response (Y,N,T,C)**
WAR 1	The solution must allow users to track warranty claims submitted to manufacturers and vendors.	
WAR 2	The solution must alert the user when a repair is covered under a warranty when opening a work order.	
WAR 3	The solution must mark warranty credit transactions to provide a historical record of reimbursements.	
WAR 4	The solution must notify the user prior to issuing a new item that the old item was still under warranty.	
WAR 5	The solution must track warranty by usage and time. It also must report all occurrences of warranty failure to aid in locating quality problems within vendor- supplied goods.	
WAR 6	The solution must provide a list of items that have failed during the warranty period.	

4.11 Fuel Management

The following section details the fuel management requirements needed in the Fleet system.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Fuel Management (FUEL)		
Number	**Description**	**Response (Y,N,T,C)**
FUEL 1	At a minimum, the solution must track fuel consumption and cost by the following: • Individual Vehicle/Equipment • Department • Division • Agency • Operator • Date/Time • Etc.	

FUEL 2	The solution must allow the user to view the following costs (online): • Fuel • Operational Fluids as well as the associated meter reading.	
FUEL 3	The solution must provide search capabilities for fuel transactions by fueling site, user-selected date range or equipment number.	
FUEL 4	The solution must interface with the City's fuel management solution (currently EJ Ward) to monitor fuel levels and control access to fuel.	
FUEL 5	The solution must provide the ability to import meter (odometer/hour meter) and relative information via the interface with the City's fuel management solution.	
FUEL 6	The solution must allow users to review and edit fuel exceptions prior to posting in software system.	

4.12 Equipment Planning, Budgeting and Availability Tracking

Fleet is responsible for maintaining the budget to acquire or replace vehicles and equipment. The solution must include functionality that tracks and calculates metrics required to forecast equipment budgeting and replacement. Fleet also tracks vehicle downtime and plans for accommodations or replacement based on vehicle availability. The solution must include functionality to manage vehicle availability.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Equipment Planning, Budgeting and Availability Tracking (EQP)		
Number	**Description**	**Response (Y,N,T,C)**
Equipment Planning and Budgeting		
EQP 1	The solution must provide the ability to plan, budget, track, and prioritize the replacement and/or addition of equipment.	
EQP 2	The solution must provide the ability to identify equipment eligible for replacement based on user-defined criteria.	
EQP 3	The solution must provide the ability to track and retrieve pertinent information regarding equipment replacement such as year replaced, mileage, replacement costs, cost per mile (CPM), etc.	
EQP 4	The solution must provide the ability to query equipment utilization to assist with procurement planning.	
EQP 5	The solution must provide the ability to project long-term replacements (e.g. forecasting).	

EQP 6	The solution must provide the ability to maintain a list of established suppliers.	
EQP 7	The solution must provide the ability to maintain and retrieve an expected delivery date per purchase order and class code by budget year.	
EQP 8	The solution must provide the ability to create and maintain a forecasted equipment replacement cost for future budget years.	
EQP 9	The solution must provide the ability to perform Life Cycle Analysis to include Optimum Replacement Analysis by applicable parameters such as Equipment Manufacturer, ID and Class.	
Equipment Availability Tracking		
EQP 10	The solution must track equipment downtime including the number of hours a work order is open or other factor that identifies that equipment is currently not in service.	
EQP 11	The solution must provide downtime analysis of work by total and averages of including, but not limited to: • Class of equipment • Work order number • Department/Division	
EQP 12	The solution must provide the ability to report user downtime by cause.	
EQP 13	The solution must provide an online review of downtime by status.	

4.13 Vehicle Pool

Fleet Management is responsible for managing and providing pool vehicle services for City agencies. A charge-back process is completed to bill the agencies for usage of pool vehicles.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Vehicle Pool (VP)		
Number	**Description**	**Response (Y,N,T,C)**
VP 1	The solution must provide a completely integrated online Vehicle Pool Module that contains the following information including, but not limited to: • Reservation Requests • Reservation Approvals / Rejections • Dispatches • Returns • Billing • Number of vehicle pool reservations	
VP 2	The solution must provide the ability to determine the availability of equipment units of any type.	
VP 3	The solution must support any number of user-defined pool vehicle types, which users can assign to pool equipment units.	
VP 4	The solution must provide the ability for authorized users to reserve vehicles online.	
VP 5	The solution must provide the ability for authorized users to query and retrieve reservations.	
VP 6	The solution must determine vehicle availability and calculate the charges for reservations based on pool vehicle types (Rental Class).	
VP 7	The solution must optionally allow organizations to require an approval for reservation requests.	
VP 8	The solution must provide the ability for a customer to schedule a reservation online and receive a confirmation via e-mail. Additionally, the system must inform vehicle pool manager or staff that a reservation is added.	
VP 9	The solution must have a reservation copy feature to allow for duplication of recurring reservation requests.	
VP 10	The solution must force the entry of a valid account number for reservation charges.	
VP 11	The solution must require an update to unit meter readings at time of rental return.	

VP 12	The solution must allow for the entry of a "no rental period" or "preparatory duration," to assist in scheduling reservations. The preparatory duration time is the time required to prepare a returned unit for its next reservation.	
VP 13	The solution must provide an online screen or tab that displays all changes or modifications to the rental record.	
VP 14	The solution must provide the ability to print both vehicle pool tickets and invoices.	
VP 15	The solution must be capable of billing vehicle pool charges to specific Departments or other agencies as part of the application's standard billing functionality.	
VP 16	The solution must provide the ability to maintain an online list of units of a specified type available at the time of dispatch.	
VP 17	The solution must provide the ability to prevent double booking of reservations.	
VP 18	The solution must provide a reporting feature that lists upcoming reservations by user defined date criteria.	
VP 19	The solution must automatically flag a pool vehicle as not available for reservation or dispatch when the vehicle is in the shop for repair (i.e. vehicle has an opened work order).	
VP 20	The solution must provide the ability for a user to flag a pool vehicle as not available for reservation or dispatch during a user defined date range when the vehicle becomes unserviceable or is scheduled for a PM.	
VP 21	The solution must provide an annual usage report that details utilization and costs by department, division, agency, etc.	

4.14 System Administration & Configuration

The solution provider must configure all necessary proposed functionality for the City and work closely with the City's functional experts to finalize the configurations.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

System Administration & Configuration (SA)		
Number	**Description**	**Response (Y,N,T,C)**
SA 1	The solution must provide robust configuration options that allow the solution to be configured per Fleet's business rules. Components to be configured include, but are not limited to, screens, work orders, assets, parts & inventory, vendors, notifications and alerts, forms, reports, etc. Examples: • Automatically send notification/alert to applicable on-site shop(s) when a vehicle arrives/checks-in for service. • Send email notification to customer when repair is complete.	

SA 2	The solution must be intuitive and easily configurable by the system administrator (setup workflows, create forms, reports, etc.).	
SA 3	The solution must provide user role and function-based security to control user access to system functionality and data.	
SA 4	The solution must provide the ability to customize forms and user interfaces without significant knowledge of programming languages (e.g., drag-and-drop).	
SA 5	The solution must prevent the system administrator from creating duplicate User IDs.	
SA 6	The solution must provide the ability to add, edit, delete and deactivate users.	
SA 7	The solution must provide the ability to create and assign user roles.	
SA 8	The solution must provide the ability to assign a user to more than one role (e.g. A person may be both a system administrator and a superintendent).	
SA 9	The solution must provide administration rights that can be set at multiple levels.	
SA 10	The solution must provide the ability for authorized personnel to configure/modify system access.	
SA 11	The solution must provide audit trails to log and report system administration activities. Example: Activity logs, audit trails and reports must include, but are not limited to, user account creation and user account modifications.	
SA 12	The solution must provide functionality that allows the system administrator to: • Select the type of alert/timer that is available to the user and to • Identify the alert/timer attributes (e.g., on/off, time interval, triggers, display features, etc.)	
SA 13	The solution must provide maintenance tables to manage the content available for selection in dropdown boxes, list of values, etc. Examples of maintenance tables that need to be included are Order Unit, Manufacturer, Model, etc.	
SA 14	The solution must allow the system administrator to create, edit and print user defined data fields and associated values (e.g. drop-down lists, list of values, etc.).	
SA 15	The solution must provide the ability to make fields visible or invisible depending on parameters, user rights, and access controls.	
SA 16	The solution must provide the ability to configure and generate letters, forms, and notifications.	
SA 17	The solution must enable users to specify business rules and formats for data fields, including both user-defined fields and vendor-defined fields.	
SA 18	The solution must provide tools that allow authorized users to configure new or update existing forms.	

SA 19	The solution must provide the ability to configure automatic alerts and notifications. The administrators must be able to: • Configure rules and conditions to generate a notification based on stored data, a defined business rule or event • Configure and maintain alerts for individuals, businesses, organizations and locations	
SA 20	The solution must provide functionality to allow the system administrator to modify configuration parameters without the need of a programmer or support from the manufacturer (e.g., user-friendly GUIs, configurability, code, etc.).	
SA 21	The solution must provide the ability for the system administrator to configure link(s) on any screen/report to any URL (internal/external).	
SA 22	The solution must provide the ability to automatically generate template forms and emails using data from the system. Example: The solution generates an email requesting payment from a customer that includes customer content previously entered in the system.	
SA 23	The solution must provide the ability to identify documents to be archived /purged from the system using configurable retention schedules.	
SA 24	The solution provider must configure all necessary proposed functionality for the City and work closely with the City's functional experts to finalize the configuration and knowledge transfer.	
SA 25	The solution provider must detail the potential configuration options that are available to meet the requirements.	
SA 26	The solution provider must conduct project team training on configuration tools and processes.	
SA 27	The solution provider must develop a prototype of Fleet functionality with and without interfaces in addition to conducting prototyping sessions.	
SA 28	The solution provider must produce the following configuration deliverables: • Configuration Management Plan • Configuration Specification Document • Project team training on configuration tools and processes • Any applicable process mapping Note: In the response, the solution provider must describe the details of the configuration management plan.	

4.15 Interfaces

The solution must communicate with in-house and third party applications. The vendor must provide seamless integration with the interfaces defined below.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Interfaces (INT)		
Number	**Description**	**Response (Y,N,T,C)**
INT 1	The Parts House **Interface from the Fleet parts provider (The Parts House - TPH) to the Fleet solution** TPH (external vendor) is the current external parts provider to Fleet. It is located in the same building as Fleet. The solution must interface with whatever parts provider is being used at the time of implementation to the Fleet system. This will allow the Fleet system to be updated with parts that TPH has provided to Fleet. See Exhibit 5.3.1 for fields to be included in the Interface.	
INT 2	Oracle Fusion Financials **Bi-directional interface with the City's financial system (Oracle Financials).** The solution must interface with the City's financial system's account receivables, general ledger and project modules. See Exhibit 5.3.2 for the required CSV file layouts. a) The interfaces from Fleet to Oracle Financials will allow Fleet to send information regarding charges incurred during the month to Oracle Financials for month-end billing. b) The interface from Oracle Financials to Fleet will allow Oracle Financials to send information to Fleet regarding: • Changes to Fleet's GL accounts (Accounts Receivable) • What Oracle Financials has paid (Accounts Payable) Information Fleet receives from Oracle Financials must include: • Customer Number • Customer Site • Amount Paid • Date Paid • Invoice Number • Chart of Account o Fund o Center o Account o Project o Activity o Interfund o Future	
INT 3	EJ Ward System **Interface to Fleet from the fuel control system**	

	Currently Fleet uses the EJ Ward System for fuel control and reporting. It provides Fleet with fuel usage information. The solution must interface with the EJ Ward System or whatever Fleet's fuel control and reporting system is at the time of implementation. See Exhibit 5.3.3 for fields to be included in the Interface.	
INT 4	<u>Vendor Files</u> **Accept Files from vendors** The solution must accept files (for example in .csv format) from vendors and automatically update Fleet's system (per line item on the bill). See Exhibit 5.3.4 for fields to be included in the files from vendors. Note: External vendors send bills to Fleet for services rendered to Fleet (services such as car washes, tires, etc.)	
INT 5	<u>Oracle Cloud Fusion Procurement System</u> **Bidirectional interface to the City's Procurement System** Currently Oracle Cloud Fusion Procurement is the City of Jacksonville's procurement system. The solution must provide a real-time bidirectional interface with Oracle Cloud Fusion Procurement system. See Exhibit 5.3.5 for fields to be included in the interface. a) The interface from Fleet to Oracle Cloud Fusion Procurement will automatically update the Procurement System when vendor bills are entered into the Fleet system (pay vendors). b) The interface from Oracle Fusion Procurement System to Fleet will automatically update the Fleet system when purchase orders are created in the Procurement System. This interface does not currently exist but is desired by Fleet.	
INT 6	Identify systems to which your proposed solution currently integrates.	

4.16 User Portal

The user portal is used to provide electronic communication between the fleet system and internal and external agencies. The following section details the user portal requirements needed in the Fleet system.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

User Portal (PORT)		
Number	**Description**	**Response (Y,N,T,C)**
PORT 1	The solution must include a user portal that provides internal and external agencies access to functions within the fleet system.	
PORT 2	The solution must provide the ability for Fleet users, with appropriate authority, to identify the system modules that agencies are able to access (per business rules) via the portal.	

PORT 3	The solution must provide automatic work order status notification.	
PORT 4	The solution must allow agencies to request repair service via the portal.	
PORT 5	The solution must automatically notify agencies via email when equipment is ready for pickup.	
PORT 6	The solution must provide the ability to generate automatic email notifications. Examples: To notify that preventative maintenance is due, to confirm a scheduled appointment, to notify that an asset is reaching end-of-life, etc.	

4.17 Disposal

The following section identifies the requirements for tracking information relating to the removal of an item from service.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Disposal (DSPL)		
Number	**Description**	**Response (Y,N,T,C)**
DSPL 1	The solution must allow the removal of a vehicle from service (dispose of vehicle).	
DSPL 2	The solution must provide the ability to maintain the following data elements (at a minimum) for the sale of equipment: • Date of Sale • Sale Number • Sale Price • Expenses (auction fees, labor costs) • Auction Company • Sold to (Purchaser Contact Information) • Net proceeds • Etc.	
DSPL 3	The solution must allow the user to identify all vehicles that have been permanently removed from service along with each vehicle's disposal details (salvage value, date of disposal, etc.).	
DSPL 4	The solution must provide the ability to track an estimated market value for vehicles and equipment.	

4.18 Dashboard

The following section identifies the requirements for creating and modifying dashboards and gauges and graphs.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Dashboard (DSHB)		
Number	**Description**	**Response (Y,N,T,C)**
DSHB 1	The solution must allow users to modify existing dashboards, create new dashboards and change the look and feel of any dashboard gauge or graph. Dashboards must be configurable to provide overview of real-time key performance indicators (KPIs). Examples of KPIs include, but are not limited to, the following: • Percent of direct labor hours versus indirect labor hours for the current month • Number of overdue preventative maintenance tasks for the current month • Average vehicle in shop turn-around-time for the current month • Outsourcing repair costs for the month • Number of required annual safety inspections that have not been completed	
DSHB 2	The solution must be delivered with a library of standard gauges and graphs that give customers the ability to control the dashboard's look and feel.	
DSHB 3	The solution must provide security to control a user's ability to view specific dashboards (i.e. dashboards must be viewable based on user's role).	

4.19 Training & Support

The vendor must provide a comprehensive training program as well as provide system support after implementation. The following section identifies the training and support requirements needed in the Fleet system.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Training & Support (TRN)		
Number	**Description**	**Response (Y,N,T,C)**
TRN 1	The vendor must provide a comprehensive training program that includes instructor-led on-site training to facilitate successful implementation of the solution. Timing of the on-site training will be determined by the City.	

TRN 2	The vendor must conduct training in the City environment using City data, configuration settings, terminology, business processes, and scenarios.	
TRN 3	The vendor must provide trainees with workbooks, training aids, and online functional or technical system manuals prior to or during the training session.	
TRN 4	The vendor must provide training for all levels of users from management to shop floor technicians.	
TRN 5	The vendor must conduct training on configuration tools and processes.	
TRN 6	The vendor must assist with all required testing including: interface testing, QA testing, user acceptance testing, etc.	
TRN 7	The vendor must provide support services through an unlimited toll-free line from 7:00 am to 5:00 pm Eastern Time, Monday through Friday with support staff available afterhours.	
TRN 8	The vendor must provide remote diagnostic support that is included as part of annual support in the service agreement.	
TRN 9	The vendor must provide guaranteed maximum two (2) hour response time during business hours to all electronic requests for support or service.	
TRN 10	Support calls must be answered by full time support technicians that are experts in the software.	
TRN 11	The solution support personnel staff must include full time fleet professionals with experience in the municipal fleet industry.	

4.20 Security

In an effort to maintain data integrity and to mitigate data confidentiality risks, the solution must adhere to the City's Security and Privacy policies as identified in the following table.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Security (SEC)		
Number	**Description**	**Response (Y,N,T,C)**
SEC 1	The solution must have the technical capabilities to enable comprehensive audits by authorized agents of the City to ensure compliance to security as well as confidentiality requirements.	
SEC 2	The solution must adhere to new transaction encryption standards and must be configurable to change as encryption standards change.	
SEC 3	The service provider must provide notification of upgrades and patches and the City must be given the choice to defer them based on impact and affected system functionality.	
SEC 4	The solution must provide appropriate data access, to enable compliance to agents of the City administering an audit process of the data collected.	
SEC 5	The solution provider must provide delivery of the application source code and/or access to data as defined by the City's IT department during negotiation.	
SEC 6	The solution provider must disclose all custodians who will have access to data (external roles).	
SEC 7	The solution must maintain regulatory compliance requirements pertaining to and defined in the HIPAA, SOX laws and PCI-DSS library.	
SEC 8	The solution must store the last time and date that the password change occurred for external agencies.	
SEC 9	The solution must time-out or suspend users after being idle for a specified time. The user must then re-enter their password before continuing.	
SEC 10	The solution must provide the ability for external agencies to create their own profile including a login User ID and Password based on business rules.	
SEC 11	The solution must provide the ability to reset passwords for authorized users with user IDs outside of the active directory (AD) of the City of Jacksonville.	
SEC 12	The solution must provide the ability to define system level of access depending on user role.	

SEC 13	The solution must restrict viewing of information based on the permissions granted to the user's assigned role.	
SEC 14	The solution must allow the system administrator to set security permissions that apply to all groups within a specified group (e.g. department).	
SEC 15	The solution must provide the ability to have *auto* sign on for each internal user utilizing Active Directory.	
SEC 16	The solution provider must provide the ability to assign City system administrators by functional areas as well as "super" system administrators with access to all functional areas.	
SEC 17	The solution provider must provide security for confidential or sensitive data contained in the software environments by encrypting system-identified sensitive data. Example: Personally Identifiable Information (PII)	
Infrastructure Protection and Regulatory Compliance Requirements		
SEC 18	All City data must continuously reside within the continental US. The solution provider will disclose the locations (city and state) where data centers, housing the City's data are located, including disaster-recovery and mirror sites.	
SEC 19	The solution must protect the City's data from unauthorized access. The solution will, at a minimum, comply with the following security and privacy requirements and standards, and maintain compliance as future versions of these regulations evolve over time: • Homeland Security Presidential Directive (HSPD-12) Common Identification Standard, August 27, 2004, where applicable • FIPS PUB 200, Minimum Security Requirements for Federal Information and Information Systems • NIST Special Pub. 800-45 Rev. 2, Guidelines on Electronic Mail Security • NIST Special Pub. 800-18 Rev. 1, Guide for Developing Security Plans for Federal Information Systems • NIST Special Pub. 800-30, Risk Management Guide for Information Technology Security Risk Assessment Procedures for Information Technology Systems • NIST Special Pub. 800-47, Security Guide for Interconnecting Information Technology Systems • NIST Special Pub. 800-53 Rev. 3, Recommended Security Controls for Federal Information Systems • Privacy Act of 1975 (5 U.S.C. Sec. 552a) • CMS requirements, which points back to NIST 800-53 rev 4 moderate baseline • Guidance from CMS including MITA Framework 2.0 and Harmonized Security and Privacy Framework	
SEC 20	The solution provider shall ensure that a system in a failed state does not reveal any sensitive information or leave any access controls open for attacks.	

Hosted Solution Requirements		
SEC 21	If data is hosted on multiple servers, data exchanges between and among servers must be encrypted.	
SEC 22	Compliance is required with SAS70 Type II or its successor. Annually the solution provider must provide a copy of an independent auditor's report on compliance with the standards as set forth in SAS70 Type II or its successor. Failure to provide the report or to show material compliance will be considered a breach of contract.	
SEC 23	The solution provider must maintain a secure hosting environment providing all necessary hardware, software, and Internet bandwidth to manage the application and support users with permission based logins.	
SEC 24	The solution provider must provide all subscription and licensing requirements, to support Production and UAT/Dev environments, including but not limited to estimated user quantity, up-front cost, and ongoing support fees for a minimum of two environments (UAT/Production).	
SEC 25	Hosting Services must be provided on a network offering adequate performance to meet the business requirements. Adequate performance is defined as 99.99% uptime, exclusive of the regularly scheduled maintenance window.	
SEC 26	The solution must provide Single Sign-On (SSO) authentication for internal user logins. (Example: Via Active Directory Federated Services).	
SEC 27	All components of the infrastructure must be reviewed and tested to ensure they protect the applicable hardware, software, and its related data assets. Tests must focus on the technical, administrative and physical security controls that have been designed into the system architecture in order to provide confidentiality, integrity, and availability.	
SEC 28	The solution provider must be solely responsible for any costs and liability associated with any breach at the location.	
SEC 29	The Solution provider must authorize the City's IT and Security to perform scheduled and random security audits, including vulnerability assessments of the Solution provider's system infrastructure and/or the application upon request.	
SEC 30	The solution provider must describe the fire detection and suppression system, physical security of and infrastructure security of the proposed hosting facility. The environmental support equipment of the solution provider website hosting facility (power conditioning, HVAC, UPS, and generator) must be acceptable to the City's IT and Security.	
SEC 31	The solution provider must agree and adhere to the City's IT requirements for upgrade and software patch implementations that would impact the integrated systems. These requirements include a method of deployment, required notifications and other interactions with the City's IT services to be defined during negotiation. The Solution provider must obtain designated City administrator approval if upgrades have any impact to the current integrated system.	

SaaS Solution Requirements		
SEC 32	The solution provider must ensure data center personnel (employees, subcontractors, and agents) comply with the requirements of this document and any additional requirements within the contract.	
SEC 33	The solution provider must facilitate the City's assessment of the contractor's continued maintenance of certifications (e.g., data center certification, SAE 16 Reporting on Controls at a Service Organization and compliance, and ISO 27001 Information Security Management Systems) and compliance with associated practices. The contractor must provide at no charge to the City the most recent third party Service Organization Control (SOC) Type 2 audit reports as well as any reports of audits conducted during the term of the contract.	
SEC 34	The contractor must provide the installation, technical support, and access to the software, third-party software, and all other development tools and software expected for the project.	
SEC 35	The solution provider must provide availability of and access to the required instances within the timelines identified in the approved implementation work plan.	
SEC 36	The solution provider must notify a designated City employee within a designated period of time after an unplanned outage and give an estimated recovery time and periodic status updates until the recovery is complete.	
SEC 37	The solution provider must notify and coordinate all solution maintenance downtime with a City Project Manager to minimize the impact of downtime windows on project activities.	
SEC 38	The solution provider must provide capacity management, which refers to the planning and control of all systems and support components (e.g., CPU, memory, disk space, tape, network bandwidth, electrical and HVAC) to ensure sufficient infrastructure resources to satisfy the City's system and application requirements.	
SEC 39	The solution provider must provide security for the software environments consistent with the security requirements established by the City.	
SEC 40	The solution provider must perform User Authentication for both internal and external users.	
SEC 41	The solution must provide Single Sign-On (SSO) authentication for internal user logins. (Example: Via Active Directory Federated Services).	
SEC 42	The solution provider must create audit logs to track changes to existing records.	
SEC 43	The solution provider must provide for failover of the environment to maintain high availability. Examples: Failed component or server	
SEC 44	The solution provider must comply with the City's Business Continuity Planning/Disaster Recovery Requirements which delineate the following: • A Recovery Point Objective (RPO) of 30 minutes or less; and • A Maximum Tolerable Downtime (MTD) of 24 hours or less.	

SEC 45	The solution provider must provide and employ system availability monitoring tools with results provided to the City on a weekly basis.	
SEC 46	The solution must provide the ability to export a copy of the full system's database in a non-proprietary format with the option of the associate table schema.	
SEC 47	The Solution provider must obtain designated City administrator approval if upgrades have any impact to the current integrated system.	

4.21 Technical Requirements

The solution must adhere to the City's technical requirements as defined below.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Technical Requirements (TEC)		
Number	**Description**	**Response (Y,N,T,C)**
TEC 1	The solution must support the latest two versions of web browsers, including but not limited to Mozilla, Firefox, Internet Explorer, Microsoft Edge, Chrome, etc.	
TEC 2	The solution must be compatible with MS Office 365.	
TEC 3	The solution must provide the ability to support real time and batch update processing.	
TEC 4	The solution must provide the ability to prohibit record deletions.	
TEC 5	The solution must provide the ability to run multiple environments (e.g. development/configuration, system testing, training/quality assurance, and production).	
TEC 6	The solution must provide the ability to perform bi-directional interfacing with third-party applications and legacy systems. Describe your approach to bidirectional interfaces.	
TEC 7	The solution provider must work with the City to convert and migrate required data from existing systems into the solution.	
TEC 8	The solution must be fully supported by the vendor, including software updates, patches and maintenance.	
TEC 9	The vendor must define all hardware, software and networking requirements.	
TEC 10	The vendor must be able to provide a sandbox demonstration of their product in order to exhibit how the system will operate as well as provide a rigorous user-testing environment.	
TEC 11	The solution must utilize a responsive design in order to display on different devices such as smartphones, tablets, etc.	

TEC 12	The solution must allow one or more users to view the same record simultaneously.	
TEC 13	The solution must provide transaction logging (i.e. audit trails).	
TEC 14	The solution must provide the ability to view the entire history of data captured even if it has been archived.	
TEC 15	The solution must provide the ability to clone data from one database to another database.	
TEC 16	The solution must provide the ability to clone configuration settings from one environment to another (i.e., production to training, etc.).	
TEC 17	The solution must provide the ability to perform bi-directional data flow with the City's legacy systems.	
TEC 18	All user interfaces and other deliverables in the solution must provide accessibility features in accordance with Section 508 of the Rehabilitation Act of 1973. Complete technical descriptions are provided on the following site: http://www.section508.gov.	
TEC 19	The solution must have the ability to utilize the latest technology available (such as barcoding, RFID and scanning) where feasible for technician tasks and equipment inventory management and control.	
TEC 20	The solution must contain a completely web-based portal, with the capability to set multiple levels of system access based on assigned role in the system. Example: Read-Only to view the status of an open work order without the rights to edit.	
TEC 21	There shall be no application software that requires installation on the workstation; this includes help files, executables or database software. The system must be accessible purely from a web browser. This provision provides an exception for browser "plug-ins".	
TEC 22	The vendor must identify the APIs that are currently supported.	

4.22 Performance & Business Continuity

In order to continue to provide acceptable levels of service following a disruptive incident, the solution provider must provide the following information regarding performance and business continuity capabilities.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Performance & Business Continuity (PBC)	
Number	**Description**
PBC 1	Describe your company's approach to ensuring required availability and how it incorporates fault tolerance and fail over.

PBC 2	Provide a copy of your proposed Service Level Agreement (SLA), specifically referencing planned outage windows.
PBC 3	Describe expected system response time, and your ability to make that part of the SLA to ensure the users experience a fast and responsive solution.
PBC 4	Provide statistics on aggregate up time over the last 12 months and provide the method of calculation.
PBC 5	Provide statistics on the number of outages and the duration of outages over the last 12 months. Provide the method of calculation.
PBC 6	Describe your ability to produce outage reports that includes the level of impact to the user base.
PBC 7	The solution provider must notify City of Jacksonville (COJ) administrators of planned outages at least one week in advance (within the negotiated service level agreements)
PBC 8	The solution provider must notify City of Jacksonville (COJ) administrators within a designated period of time after an unplanned outage, and give an estimated recovery time and periodic status updates until the recovery is complete.
PBC 9	Locally hosted solutions must agree and adhere to the City's IT requirements for upgrade and software patch implementations. These requirements include method of deployment, required notifications and other interactions with the City's IT services to be defined during negotiation.
PBC 10	Describe your disaster recovery plan and your process for ensuring business continuity.
PBC 11	Describe your solution upgrade approach and its impact to the user base. Examples: a) Are we able to test system updates prior to moving to production? b) Are we able to "opt out" of system updates?
PBC 12	Describe your key performance indicators (KPI). Explain the frequency of your KPI reporting to the City.
PBC 13	The solution must provide full and incremental backup capability or industry-acceptable methodology from within the solution. This includes all data, attachments, and system settings.
PBC 14	Define your: • Approach to data backup and recovery • Strategy to ensure the security and integrity of the data collected • Alternative site strategies (i.e., cold, warm, hot)

4.23 Exit Strategy

The following table addresses processes that must occur if/when services with the City are terminated.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Exit Strategy (EXIT)	
Number	**Description**
EX 1	Describe your transition approach when service with your company ends.
EX 2	The solution provider must return to the City any City data in the solution or under the protection of the solution provider (under its care, custody and control) upon notice by the City in a City-specified format.
EX 3	Explain how the City's data would be removed from your service and transferred to the City or a third-party service and in what format.
EX 4	Differentiate between the responsibilities of the service provider and the responsibilities of the City during the exit process.
EX 5	The solution provider must prepare (at no cost to the City) an Exit Plan and Service Transfer Plan and must submit it to the City for approval. Note: Please describe the details of the Exit Plan and the Service Transfer Plan.
EX 6	The solution provider must review and revise the Exit Plan and the Service Transfer Plan to account for changing technologies and any changes to the scope or nature of the services at no additional costs to the City.
EX 7	Affirm that no cost will be incurred by the City of Jacksonville upon exit.

4.24 Testing & Acceptance

The solution provider will be required to provide a testing strategy and plan (including scripts) as a project deliverable to the City, along with the ability to provide four system environments: development/configuration, Quality Assurance (QA - testing), training, and production.

Note: Where applicable, the Respondent is encouraged to explain how the solution will satisfy the requirements and to elaborate on any supplementary functionality available to accommodate the business needs expressed in this section.

Testing & Acceptance (TST)	
Number	**Description**
TST 1	The solution provider must designate a Quality Assurance (QA) Team to work in collaboration with the City's Quality Assurance Team.
TST 2	The solution provider must explain the overall approach as well as developing a Master Test Strategy and identifying the quality control measures and practices that will be implemented to ensure rigorous testing prior to implementation per City specifications.
TST 3	The solution provider must execute the following tests using an industry standard software development and testing methodology: • Unit (Configurations) Testing • System (Functional) Testing • Integration/Interface Testing • Parallel Testing • Performance Testing • User Acceptance Testing • Security Testing Note: In the response, the solution provider must provide the test methodology to be used.
TST 4	The solution provider must provide a classification and tracking method to facilitate the testing process, including those tools used for performance testing. The Contractor must provide training on the proposed testing tools to all City staff that are expected to use the proposed testing tools.
TST 5	The solution provider must develop and be in collaboration with the City's Quality Assurance Team for review and final approval of the following: • Unit (Configurations) Test Plan • System (Functional) Test Plan • Integration/Interface Test Plan • Parallel Test Plan • Performance Test Plan • User Acceptance Test Plan • Security Test Plan
TST 6	The City will have the responsibility for conducting acceptance testing of the entire application. The solution provider must provide assistance during such testing. The assistance must include, but will not be limited to: • Creating the acceptance testing environments • Loading configuration values and loading data • Establishing user security in accordance with the Fleet GO-Live deployment plan • Performing backups • Restoring databases

TST 7	The solution provider must provide final acceptance documentation to be reviewed and approved by the City.
TST 8	The solution provider must work with the City to ensure that at the time of cutover, the system is functioning with performance superior to that of the current system.
TST 9	The solution provider's proposed QA Plan must describe their proposed QA Team Organization, functions and responsibilities in accordance to the test requirements specified in this document.
TST 10	In addition to the test plan, the solution provider must provide the following deliverables: • Completed test scripts and/or use case scenarios or for all test types (unit, system, integration, parallel, performance, and security testing) • Traceability matrix of functional requirements • Documented test results and reports for all test variations • Defect tracking reports including information such as severity, status, etc. • Test summaries for all variations of test types (unit, system, integration, parallel, performance, and security testing) • Documentation of the problem resolution process • Performance test metrics, including response time metrics • User acceptance testing sign-off documentation • Any other deliverable defined per City specifications
TST 11	The solution provider must have the ability to provide four system environments: development/configuration, quality assurance (QA testing), training, and production.

4.25 Data Conversion

Data conversion into the operational application components of the new solution will include, at a minimum, data that is required to support ongoing business processes. The solution provider must describe the strategy, preparation, and specifications for migrating existing system data to the new solution.

Note: In the response, the Respondent must describe the details of the requested deliverables including approach and any other pertinent information.

Data Conversion (DC)	
Number	**Description**
DC 1	a) The solution provider must convert the following data from the existing system (Tivoli) to the new system: All records with *Status*="Operating" or the *System Create Date* is greater than or equal to 8/1/2009. b) All associated information/tables must be converted, including but not limited to the following: • Assets • Loan Fund • Chart of Accounts • Customers • Companies • Receiving • Invoices • Labor • Crafts • People • Component Codes • Position Codes • Labor Rate Contracts • Fuel Issues • Warranties • Work Orders Note: No inventory records will be converted.
DC 2	The solution provider must provide a roadmap for performing data conversion including a methodology to address assumptions, risks, limitations, and constraints as well as essential functions included in the data conversion process.
DC 3	The solution provider must collaborate with the City for review and approve of all activities related to converting legacy data to the new system.
DC 4	The solution provider must include conversions required to support the transaction operations upon implementation that are consistent with the implementation plan and Go-Live dates.
DC 5	The solution provider must provide data conversion services, including but not limited to the following: • Coordinating pre-conversion activities • Developing programming specifications • Coding of conversion programs • Building any crosswalk file structures • Performing unit and integration testing • Developing reports

	• Managing execution of dress rehearsals • Running conversion programs • Maintaining a conversion log
DC 6	The solution provider must be responsible for loading data extract files provided by the City.
DC 7	The solution provider must develop queries and reports required by the City to validate City data in the new system solution.
DC 8	The solution provider must be responsible for resolving any differences in data identification schemes.
DC 9	The solution provider must assist with data extraction from legacy systems.
DC 10	The solution provider must complete a data conversion program, including data mapping and associated crosswalks.
DC 11	The solution provider must develop a mock data conversion test plan to be reviewed by the City.
DC 12	The solution provider must execute mock data conversion testing after review and approval by the City.
DC 13	The solution provider must assist in the validation of the quality and accuracy of converting data from mock data conversion testing.
DC 14	The solution provider must provide guidance to the City on performing required data clean-up efforts identified through the mock data conversion process.
DC 15	The solution provider must assist with manual conversion of data (including non-electronic data) and crosswalks.
DC 16	The solution provider must execute the conversion processes (production) after City approval of all data conversion preparation and testing processes.
DC 17	The solution provider must assist in post data conversion processes including validating the quality and accuracy of data.
DC 18	The Contractor must provide the following deliverables: • Data Conversion Plan • Data Mapping Design Document • Conversion Program and Crosswalks • End-to-End Conversion Test Runs • Successful Completion of End–to-End Conversion Test Runs • Successfully Converted Data into Production Environment Note: In the response, the Contractor must describe the details of the data conversion plan.

4.26 Implementation & Post-Implementation

The City requires an extensive and carefully structured approach to the implementation and post-implementation of the solution application software. This includes the organization and execution of cutover activities necessary to transition operations to the new system. The service provider must provide on-site support throughout the entire Implementation Phase. At a minimum, the City requires the services described below.

Note: In the response, the Respondent must describe the details of the requested deliverables including approach and any other pertinent information.

Implementation & Post-Implementation (IMP)	
Number	**Description**
IMP 1	The solution provider must deliver a detailed Deployment Cut-Over Plan to reflect all project activities that impact deployment of the solution application software in the production environment.
IMP 2	The solution provider must document all steps required to make a successful cut-over to the production environment, including specific cut-over tasks, planned and actual dates for tasks completed, task responsibilities, task dependencies, estimated work effort required, task status, results of task completion, and sign-off for each task completed.
IMP 3	The solution provider must describe the details of the deployment plan (e.g., final data conversion activities, technical preparation, system changeover, etc.).
IMP 4	The solution provider must maintain a Cut-Over Checklist that tracks each activity required to ascertain that the solution is ready for deployment.
IMP 5	The solution provider must prepare procedures, establish processes, train personnel, track incidents, and participate in the delivery of end-user support.
IMP 6	The solution provider must develop a Service Desk End-User Support Strategy that includes plans for using the City's service desk infrastructure and defines roles and responsibilities for the service desk and the solution provider support personnel.
IMP 7	The solution provider must develop procedures for providing support that includes all activities, operations, and steps necessary to allow the contract team members to provide required functional support for City personnel.
IMP 8	The solution provider must assist the City in the incorporation of the new procedures into the City's existing infrastructure.
Post-Implementation	
IMP 9	The solution provider must provide post-implementation support for three (3) months after GO-Live
IMP 10	The solution provider must provide post-implementation, maintenance and support that will consist of technical, functional, and operational support, and must be provided by skilled personnel who have become familiar with the project over the course of the implementation effort.
IMP 11	The solution provider must provide all consulting and implementation services necessary to keep the City current on the latest release of the solution software for the entire Implementation Phase
IMP 12	The solution provider must provide the following deliverables: • Service Desk and Support Strategy

	• Development Cut-Over (Go-Live) Plans • Production Cut-Over (Go-Live) Checklists • End-user Support Procedures • Post-Implementation Status Report of Teams Support Activities

4.27 Contractor Questionnaire

All contractors must complete the following questionnaire. For questions that are not applicable, provide a brief explanation explaining why it is not applicable to your solution.

Architecture	
What are the server platforms supported for your proposed system and the operating system versions supported for each platform?	
What are the infrastructure requirements for the application and database?	
What language was used in the development of the application?	
What are the server and hardware requirements?	
What type of database supports this application?	
What are the licensing requirements for all components of the system?	
Are there any middleware products or any required 3rd party products needed to support this application? Are these server or client based? Who is responsible to purchase the licensing?	
What are the Network Connectivity requirements?	
Is the application Citrix compliant? What versions?	
How are patches to the operating system, communicated, scheduled and installed?	

What are any special requirements surrounding your firewall?	
Can application exist on multiple environments, i.e. Prod, QA, Dev, Training, etc. Do these require additional licensing?	
What are the client web browser requirements? Are there custom configurations and setting requirements?	
What are the minimum and recommended client desktop configurations, OS, memory and CPU requirements?	
Are there additional applications that must be installed on the desktop?	
Are there any additional requirements for reporting (i.e.: SSRS Reports)?	
Do you provide a data model with your solution?	
Capacity and Scalability	
What are some of the practical limitations to the number of simultaneous users supported by this application?	
What is the application's ability to retain history, i.e. how much & for how long?	
What is your sizing methodology? How do you calculate environment/server size recommendations?	
Hosted Solution	
Where is the server located and who is responsible for business continuity and disaster recovery?	
Who has physical access to the servers hosting the application and databases?	

Who owns the url? Is the domain name registered under the hosting company name or the City?	
What other customers or companies will reside on the server? What are potential risks associated with this configuration?	
Who does customer contact with application and/or server issues?	
Who is responsible for application maintenance? What is the availability and maintenance window?	
Who is responsible for server maintenance? What is the availability and maintenance window?	
In the event either contractor goes out of business, How is the code protected? Is it in Escrow?	
How does the City take ownership of data and application if either contractor goes out of business?	
What system, site and application documentation is available in the event either contractor goes out of business?	
Is the site in Compliance to Section 508 of the Rehabilitation Act?	
Describe Roll Back or Back-out Plans?	
Interfaces	
How does the application interface with the other packages (API or any other means)?	
What format is required to input data into your system? Can the system edit incoming data with predefined parameters?	
Does the application have the ability to log unacceptable incoming data?	

Does the application have the ability to receive information and updates from other systems via an interface, on a real time basis?	
Does the application have the ability to export data easily? What are the limitations?	
Does the application have the ability to export to standard Microsoft office suites (e.g. MS Word, MS Excel, etc.) and Adobe PDF?	
Does the application integrate seamlessly with Outlook?	
Can defined business rules be overridden due to a change in business direction?	
With what operating system is the application compatible?	
Security/Control	
Does the application have the ability to run system monitoring and error reporting mechanisms for log files, production monitoring, interfaces to production monitoring tools, including any abilities to send alerts to maintenance and support staff via email?	
What are the requirements for backup and recovery of the proposed solution (i.e.: recommended frequency, resources needed and time required)?	
What is the business continuance and disaster recovery process?	
What are the typical release cycles, how are they tested and rolled out?	
How does the proposed system recover user sessions and system services in the event of failure (e.g., failures in hardware, software, networks, and equipment or with a loss of power)?	

Does the proposed solution integrate with Active Directory or does it provide its own authentication mechanism and security database?	
If solution provides its own security database, do administrators have the ability to add, modify and delete users, groups and assign role-based rights?	
How is the data secured? Is data encrypted?	
How is information encrypted when transmitted over a network?	
How are user sessions, secured?	
Do users have the ability to change their own password?	
Do administrators have the ability to create and assign individuals to multiple security classes / groups?	
Do administrators have ability to restrict confidential data to a single group owner?	
Does the application provide logs of computer security relevant events to provide data to support comprehensive audits of the effectiveness of, and compliance with security measures? (Who did what, from where, and when?)	
Does the applicant have the ability to segregate functionality by location, business unit, etc.?	

Performance	
Describe your load and stress testing methodology.	
If the application is Citrix compliant, describe your load and stress testing processes.	
What is the average time to create a new request? Please provide the shortest and longest time.	
Technical Training	
What are some of the technical support, training opportunities as it applies to evaluating and troubleshooting issues?	
What level of technical training is included as part of your proposed solution?	
What are some ongoing training capability/opportunities?	
What type of user account, profile, group and password administration training is offered?	
Support Services Training	
What type training for support services (Help Desk) on escalation and contact processes and procedures are provided?	
Are there any FAQ pages provided for service center associates and application users?	
Are there any troubleshooting scripts developed for the support services associates for end user support?	
What Internet or website opportunities for Help Desk and end-user training are available?	
What is your recommended infrastructure, training strategy?	

Contractor Support	
What technical and user support is available? Online, client hosted and on-site?	
Describe the technical, service center and user support service level/s under the proposed maintenance agreement?	
Do you have the ability to supply technical, service center and user support 24x7?	
Describe the technical, service center and user issue/problem resolution processes, procedures and timelines?	
Do you have the ability to provide remote support? What are the technical requirements?	
Describe recommended technical, service center and user support organizations and required skill sets necessary to support your proposed solution?	
Describe the current communication process you have in place for alerts, modifications and issues?	
Project Methodology	
Describe a typical project structure and methodology used during the lifecycle.	
Describe the Communication Plan used in a typical project.	
What is the average time frame for an implementation of comparable size?	
What are the general areas of customization required and the time frame around each of these?	
Explain your Change Order process.	
What methodology is used to incorporate client modifications within your proposed solution?	

How is customization by clients managed within your release/system upgrade process?	
How is Customer Acceptance Testing Managed? And explain the sign-off process.	
What is the availability of implementation resources and their experience?	

4.28 Glossary

Term / Acronym	Definition
ACH – Automated Clearing House	The primary system that agencies use for electronic funds transfer. ACH payments are electronic payments made through the Automated Clearing House (ACH) Network. Funds move from one bank account to another with the help of an intermediary that routes funds to the final destination.
AD – Active Directory	Allows network administrators to create and manage domains, users, and objects within a network. It also provides a way to organize a large number of users into logical groups and subgroups, while providing access control at each level.
ADA – Americans with Disabilities Act	Refers to Section 508 of the Rehabilitation Act of 1973 requiring ADA compliance.
Administrator	A category of system user with special training and access privileges, such as making changes to a system's configuration and viewing and modifying the account settings of end users.
API	Application programming interface.
ASD	Administrative Services Division
BRD – Business Requirements Document	The BRD defines business requirements, user classes and business functions that are to be included in a system. It usually contains an overview of the current system (at a very high level), major functions performed by the business that are needed in a system and impacted or interface systems. This document should provide all stakeholders a good understanding what the project entails.
COJ – City of Jacksonville	The city of Jacksonville, Florida (referred to as the City) throughout this document.
Customer	Fleet customers are internal and external city agencies.
ERP-Enterprise Resource Planning	Enterprise solution to manage the City's financials, budget, purchasing, human resources/payroll and budget development.
FIPS	Federal Information Processing Standards
FTP – File Transfer Protocol	Used to transfer computer files between a client and a server on a computer network.
GUI – Graphical User Interface	"Look and feel" of the screen and navigation. (pronounced "gooey")
ISO	International Organization for Standardization
ITD – Information Technologies Division	The Information Technologies Division.
MS	Microsoft
OEM	Original Equipment Manufacturer
Oracle Financials	The City of Jacksonville's financial system
Oracle Fusion	The City of Jacksonville's procurement system

PM – Preventative Maintenance	Maintenance that is regularly performed on a piece of equipment to lessen the likelihood of it failing.
Rehabilitation Act of 1973 Section 508	ADA Compliance Requirement The Rehabilitation Act requires agencies to make their electronic and information technology accessible to people with disabilities. Section 508 requires agencies to give disabled employees and members of the public access to information that is comparable to access available to others.
RFP – Request For Proposal	A type of bidding solicitation in which a company or organization announces that funding is available for a particular project or program, and companies can place bids for the project's completion.
SLA – Service Level Agreement	An agreement that defines the level of service expected – defines what the customer will receive.
SOC	Service Organization Control
SP	Service Provider
SSO	Single Sign-On
Tivoli	An IBM Enterprise Asset Management software solution.
TPH	The Parts House – The company that currently provides parts to Fleet.
Up fit	Customize a vehicle to the buyers or user's needs.
UAT – User Acceptance Testing	A phase of software development in which the software is tested in the "real world" by the intended audience.
VMRS	Vehicle Maintenance Report Standards – an industry standard repair work coding scheme.
WO – Work Order	A task, job or request for a customer that can be assigned or scheduled to someone.

ATTACHMENT B
EVALUATION CRITERIA

The evaluations will be based upon the following criteria, and Proposers are requested to provide, as a minimum, the information listed under each criterion. Failure to provide adequate information on any criterion will result in lower scores and could result in rejection of the proposal as non-responsive. The response to each of the criterion will be evaluated relative to the other responses received and will be awarded a score based on the criteria listed. Proposers are encouraged to arrange their responses in a format that will offer ready review and evaluation of each criterion. Please note that 100 points is the maximum total for all categories combined.

Criteria	Description of Criteria	Maximum Points Available
Cost	**The proposer submitting the lowest cost to the City shall receive the maximum number of points for cost. Each sub-sequentially higher cost shall be divided into the lowest cost received and the products score % will be multiplied by the maximum points available to render the points.** *Score = ((Lowest Bid)Next Low Bid) X 30*	30
Requirements Response	**All requirements will be evaluated and scored based on the contractor response and how the product is able to meet the requirements.** *Maximum of sixty (60) points*	60
References	**Proposer submitted five (5) customer references where the proposer has successfully provided five (5) consecutive years of experience providing Fleet Management Software solutions.** **References should contain the following:** **Point of Contact** **Phone Number** **Address** **Email Address** **Description of Services** *Verified references will be awarded two (2) points each for a maximum of 10 points.*	10
Maximum Available Score		100

ATTACHMENT B-1
On-Site or Virtual Demonstration Evaluation Criteria

The evaluations will be based upon the following criteria. In preparation for the on-site demonstration, please adhere to and see the requirements stated in Section 4 of this document. The presenters will be evaluated relative to the other demonstrations. Please note that the on-site demonstrations categories have a combined total of 100 points.

Criteria	Description of Criteria	Maximum Points Available
Presentation	Implementor's overall presentation, knowledge and understanding of the solution. *The presenters will be evaluated relative to the other demonstrators.*	**15**
System Functionality	Demonstrations of the end user proceeding through daily operations for vehicle repair and fleet management, to include but not limited to: work order entry, work order approval, workflow, warranty, recall, maintenance flags, sublet service entry, work order auditing, accounting functions (A/P and A/R), vehicle lifecycle analysis, vehicle replacement, asset tracking and out-of-box reporting.	**35**
Overall Ease of Use	Intuitiveness of the solution to the novice user, user friendliness of the system, and ease of navigation between applications and work processes.	**30**
System Flexibility	Ability for the City's systems administrator to make configuration changes to the system.	**10**
Report Creation	Ability to quickly produce ad-hoc or custom reports.	**10**
	Total Maximum Available Score	**100**