



WEBER COUNTY

REQUEST FOR PROPOSAL

FLEET MANAGEMENT SOFTWARE

18 APRIL 2008

REQUEST FOR PROPOSAL
WEBER COUNTY, UTAH
Fleet Management
RFP # 275594

Fleet Management Information Software System

GENERAL INFORMATION

Weber County Fleet Management Operation

Weber County maintains the following inventory:

1. 400 light duty vehicles (pickup trucks, sedans, vans, mini-vans, SUVs, etc);
2. 70 Vehicles considered heavy duty (dump truck, transport tractor, paver, etc);
3. 40 Recreation-type vehicles (ATVs, Snowmobiles, Gators, Motorcycles, etc);
4. 70 non-motorized equipment (open trailers, enclosed trailers, mower platforms, snow plows, sander hoppers, etc);
5. 50 motorized equipment (generators, lawn mowers, small power equipment, etc).

The working environment is fairly typical of a small to medium-size operation. It consists of one main garage with 11 bays. Some bays are dedicated to specialized work, such as welding. Others have lifts for underbody work. Still others are dedicated to heavy equipment work. In addition to the main garage is a satellite garage located in what is known as the "Upper Valley", some 25 miles away. The satellite garage has 8 bays. The primary use of these bays is winter work on sanding and snow removal equipment, as well as paving equipment in summer months. Situated at both locations are gas pumps that tie into the Utah Fuelman/GasCard fuel distribution system.

Located at the main garage is the Shop Foreman. He is in an office environment and has a parts inventory room located off his office. In the open area of the first bay is a desk and PC. This is a shared workstation for mechanics to do research and to log work time and parts used for assigned jobs.

The garage staff consists of the Shop Foreman, three mechanics, and part time use of one office support staff person. The Fleet Manager is co-located with the Weber County Department of Operations, some 4 miles removed from the main garage. Our largest customer, the Weber County Sheriff's Office, has one staff member assigned to oversee the Sheriff's vehicles and is located approximately two miles from the main garage.

Weber County relies on the State of Utah Fleet Management's contract with Fuelman/GasCard. Within the physical boundaries of the two garages noted above are fuel stations owned and managed by Utah Fleet Management. At the main garage location is one station consisting of two pumps – one for diesel (two hoses) and one for mogas (two hoses). The Upper Valley location has one pump with two hoses – one for diesel and one for mogas. No staff is dedicated to this effort. However, customers having problems can come to or call the main garage for assistance. Oftentimes assistance is needed in entering

correct PINs, or malfunctions of the pumps. The Shop Foreman usually handles such problems.

Because the State of Utah owns and operates these two fuel stations, no action on the part of Fleet Management is necessary. However, all departments' bills are mailed by GasCard to Fleet Management. His responsibility is to ensure payment of each bill and to distribute them to appropriate department contacts for review and filing. Any discrepancies noted by departments are brought to Fleet Management's attention and corrective action ensues.

GasCard sends data from their system to the Fleet Manager monthly following the billing period. Weber County currently manually converts selected parts of this data via Excel to usable information, sorted by vehicle, mileage, fill date(s), and consumption. The Fleet Manager reviews the list for excessive consumption, frequent fills, and operator mileage inputs. Aberrations are then pursued. Ideally new software would accept the import of such information and provide a report based on our perceived needs, perhaps using a report writer feature and/or automatic e-mail notification to the offender, the offender's department director, and Fleet Manager.

There are two issues relating to the billing process. Weber County has a multi-layered system we are attempting to consolidate into one. Some equipment and vehicles are "owned" by individual departments. Others are "owned" by Fleet Management and "leased" to departments for their use. The goal is to get all equipment and vehicles under one umbrella, that of Fleet Management. Additionally, the Garage performs maintenance and repair work for internal and several external customers, primarily Weber Human Services (Meals on Wheels, some maintenance vehicles, etc.).

The garage charges time and materials for work done for all customers, internal and external. Internal customers can be billed using an Internal Service Fund (ISF) system. External customers must be billed individually by vehicle. Components of the billings are time, materials, shop equipment, incidentals, etc., and require full description, including unit number.

The Fleet Manager bills customers for monthly leases of specified vehicles. Components of the data being collected and used for quarterly billings are:

1. cost of vehicle
2. cost of additional equipment (truck shell, public safety lighting, etc.)
3. administrative fee (either by % of 1. and 2. above or flat amount)
4. factor (%) used for overhead costs
5. total monthly charges to customer (on ISF - submitted quarterly)

In addition to the lease billing, a motor pool exists at the Department of Operations. To date, no charges have been assessed motor pool users. Steps have been taken to charge users on a daily and/or mileage basis. Data has been collected and the first quarterly billing through an ISF occurred in April 2008.

Weber County used a now abandoned vehicle replacement model for about four years. Decisions were made to purchase new vehicles at fleet prices and turn them over annually; selling one year old vehicles at retail used prices. This worked for some time until the market became glutted and the value of the used vehicles declined. Further, the system tied up scarce capital that could have been used elsewhere in the County. The last vestiges of that program are being cycled out now. Additionally, later decisions were made to use vehicles on a two-year lease cycle. This program has been somewhat more successful but it has been deemed inappropriate based on expenditures with no return on investment. As a

result, we are now purchasing about half of the leased vehicles because they have garnered less than 50% of the allotted mileage over the two years and are in good cosmetic and mechanical condition. Those with higher mileage are being turned back to the leaseholder and new replacements have been ordered. Over the past two years, approximately 30 of fifty vehicles have been purchased and the balance has been replaced.

Disposal of vehicles is handled through a third-party vendor. Through a contract, they receive a percentage of the sale price. Decisions relating to when to dispose are not based on quantifiable information. We have no program of aging, mileage, mechanical costs, or any other process. Mostly, the replacement program has been driven by the aging of the lease programs and by the Sheriff's Office decisions to replace vehicles. We need a system where we can enter parameters for aging, maintenance costing, fuel consumption and mileage on each vehicle type and vehicle application (public safety vs staff use). Flagging of vehicles that have reached the parameter limit(s) is needed for inspection and candidacy for replacement. With that information, a replacement plan can be decided on and implemented.

The garage has a computer software package entitled "Ultimate Fleet Analysis" that has been used for over ten years. This single PC based system (installed on three PCs) is useful only to the garage and was never intended to operate as a fleet management tool. However, it is the only database containing information about Weber County's vehicles, including inventory details (VINs, year, make, model, mileage, etc.), repair histories, parts inventory, etc. This information must be transferred into a new system. At this writing there is no need to transfer information to any third party vendors.

Existing Computer Environment

- Description of the existing environment: There is a common TCP/IP network between all locations. The minimum speed interconnecting the locations is 8Mbps and the maximum speed is 1Gbps. The Local Area Network (LAN) is 10/100Mbps. There is not a dedicated network for Fleet.
- At the Roads location there are three PC's. All three have windows XP Pro and 512MB or RAM, two of the PCs have P4 2.8Ghz processors and one has a P4 2.4 Ghz processor. At Operations there is one PC with Window XP Pro, 512MB RAM and a P4 3.2Ghz processor. At the Sheriffs Complex there is one PC with XP Pro, 512 MB RAM and a P4 2.4Ghz processor.
- The operating system used is Microsoft Windows 2000/XP Pro/Vista.
- Describe communications established with any remote locations: See first bullet above. The Sheriff's Office, Weber Center, and Operations connect at 1Gbps over fiber. Computers at Roads connect at 8Mbps via proprietary PtMP wireless.
- For relational database give version and type. If no database is currently being used state your preference. Oracle is preferred. Oracle 10G is the minimum database version in production.
- Describe report writing tool(s) currently being utilized. Oracle Reports.

Organizational Layout for Fleet Information System

The floor layout for use at the garage is relatively simple. The shop foreman has an office that requires a PC to manage repair orders, billings and inventory. Outside his office is a desk and workstation used by the three mechanics. Those mechanics enter information on repair orders for each job. They also order parts from that location. The shop foreman ensures the parts are ordered from the appropriate vendor and gets the part(s) to the garage in a timely manner. The administrative staff member has a separate office in close proximity to the shop foreman. S/he coordinates GasCard with fleet vehicles and enters vehicle data (VIN, license plate #, etc.). The PCs being used are networked with the server located at the Weber Center.

The server room that will house the software is located approximately four miles east of the garage, in a building known as the Weber Center. Within about 300 feet of the server room is the Fleet Manager's office. His PC is also networked to the server room.

Approximately five miles from the Weber Center is the Sheriff's Office. This is the location of the fourth key element of Fleet Management. A staff member of the Sheriff's Office needs access to the system equal to the Fleet Manager. However, his need is isolated to equipment assigned to the Sheriff. The proposed system needs to be able to segregate data by department so s/he will not be burdened with information not related to his/her operation. However, this individual may be called upon to act as the Fleet Manager in the absence of the person currently assigned as the Fleet Manager.

Computer hardware being used is typical of office operations. HP Compaq PCs and attached HP printers are commonplace. For management reports suitable for presentation to Commissioners and the like, the Fleet Manager would use a Canon Image-runner networked copier/printer.

Project Scope

The purpose of this Request for Proposal (RFP) is to secure bids to provide Weber County with tools to assist management and staff in maintaining and managing assets as efficiently and cost effectively as possible. Through improved information management and process examination, the organization will improve customer service, repairs and maintenance services, and increase staff efficiency and productivity. Complete, real time, easily accessible data will enhance staff and management ability to maximize availability, usage, and cost effectiveness of resources.

Weber County is accepting proposals for the purchase of software for a fleet management information system capable of storing, managing, and providing management reports on all information pertaining to vehicular and maintenance equipment assets. Vendor must provide the ability to receive data from the Fuelman/GasCard (or the State of Utah Fleet Management) automated fuel system, and transfer data to the organization's accounting system, providing a database for management of all assets. These exchanges must be in electronic form. Vendor must perform conversion of present data.

INSTRUCTIONS TO BIDDERS

The bidder must complete the following Vendor Questionnaire and Specifications Checklist responding to each item. Omissions and incomplete answers will be deemed unresponsive. Please initial any corrections.

Provide supplemental information to assist the organization in evaluating your system in additional sections following the same numbering scheme. This RFP document is available in Microsoft Word via e-mail upon request to the below noted contact. This may be useful in preparing responses. **The bid must include five (5) printed copies (1 original and 4 copies).** Responses should be concise and complete.

Proposals must be received at the Weber County Clerk/Auditor, Purchasing Department at the address below. **Proposals will be accepted until 2pm on 19 May 2008.** All proposals are to be sealed and clearly marked on the cover with the RFP#, name, and address. No other proposals will be accepted after this time and date. The person authorized to submit the proposal must sign all proposals.

Attn: Annette Jacobs, Purchasing Agent
Weber County Corporation
Clerk Auditor Office
2380 Washington Blvd, Ste 320
Ogden UT 84401

Weber County reserves the right to reject any or all proposals and waive any informality or irregularity in any proposal if to do so is in the best interest of the County.

ALL PROPOSALS WILL REMAIN THE PROPERTY OF WEBER COUNTY

Questions concerning specifications for this RFP may Contact Douglas R. Dickens, Fleet Manager

Phone: 801.625.3877 Fax: 801.625.3869 E-mail Address: ddickens@co.weber.ut.us

Vendor Questionnaire

Please provide the following information about your company, experience and services. Respond to each item and provide supporting documentation and/or exhibits as requested or desired.

1. Company Name
Address
Telephone Number
Fax Number
E-mail Address
Name of Single Point of Contact
Name of Person with binding authority to enter into contracts
2. Describe your company's purpose, mission and values and explain how they will support the relationship with Weber County's fleet management objectives.

3. Provide a history of your company and the proposed software.
4. Describe the professional staff available for development, training, implementation, and support services. Include their qualifications and experience.
5. Describe special staffing resources available in the areas of overall fleet management, equipment maintenance, and other management tasks.
6. Describe general characteristics that differentiate your company from others in the industry. Include any special advantages your services and system provides. Describe how they support decision-making, streamlining tasks, and error reduction to support more productive fleet personnel.
7. Describe your installed base of customers and provide a complete customer list.
8. Provide a list of five (5) sites similar to Weber County where software and services are currently utilized, with preference to those in relatively close proximity to our location. Include contact information.

General Characteristics of Product and Services

1. Describe the proposed system architecture and the language in which it is written to include installation deployment options.
2. Describe the fundamental design of the software application to include the database structure, connectivity and the method of data entry/user interface.
3. Describe your implementation services, with particular emphasis on planning, conversion and process change management. Provide a sample incremental plan including an onsite pre-installation agenda.
4. Identify issues and challenges Weber County should anticipate in this software implementation and indicate how they are resolved using your system and services.
5. Describe the types of documentation your company provides with the system. Describe any forms and how they are updated and distributed. Specify which documentation and updates are included as part of support services.
6. Describe any available technical support services and each associated cost. If there are different levels of support services, please describe each level and list the services included. At a minimum support should include:
 - Annual on-site visit and system review
 - Internet technical assistance
 - 800 line services (list hours)
 - Remote diagnostics
 - Training opportunities (at installation; periodic local; regional; national)
 - User groups
 - Annual user conferences
 - Email
 - FAX
 - Upgrades
 - Enhancements
 - Documentation and manuals
 - Instructional CD's
7. Provide a complete and detailed process customers would follow in the following situations:
 - a. Reporting a problem with the software.
 - b. Obtaining instruction/clarification on a specific system feature.
 - c. Requesting customized reports or services.
 - d. Obtaining professional fleet advice due to changes in the structure or political setting.
 - e. Obtaining technical assistance in making changes in the system coding to achieve a specific objective.
 - f. Requesting and arranging an increase/decrease in the number of workstations.
 - g. Requesting additional instruction or on site services. Timeliness is of the essence for follow-up and a solution from the vendor.
8. Describe System Administration, to include setup and maintenance, reports administration, and disaster recovery and backup.

Specifications Checklist

Please respond fully to each item. Omissions and/or incomplete answers will be deemed non-responsive.

Please respond to each specification as indicated below

- Y** Yes – the system currently meets this requirement and is included with the standard program at no additional cost.
- AO** Add On – yes, the system currently meets this requirement with an add-on module that is fully integrated. Provide a description and cost in the comments section.
- UD** Under Development – provide a description, anticipated release date, and projected cost if possible.
- M** Modification necessary to meet this specification or the system provides this functionality in a different way. Provide a description and any additional costs in the comments section.
- C** Customized Services – this can be accomplished through customized services. Please provide a not-to-exceed cost.
- N** No – system does not meet and has no plans to meet this requirement.

Each specification is listed as:

- M** Mandatory - this specification must be met. Any exceptions must be included on the exception list.
- D** Desirable - this specification is an optional or desired feature.

The responses to each specification will be assigned a point value by the evaluation committee from 0 – 5 as described below:

- 5** Significantly exceeds the expectations in the rated area.
- 4** Exceeds many of the expectations in the rated area.
- 3** Meets all the expectations in the rated area.
- 2** Minimally meets all the expectations in the rated area.
- 1** Meets some but not all expectations in the rated area.
- 0** Does not meet expectations, is omitted, is incomplete, and/or has insufficient information in the rated area.

From the written material presented, the specifications will be assigned point scores based upon bidder's ability to address and meet the desired feature or defined task. By multiplying the points awarded by a predetermined weight factor for each criterion the total points will be calculated.

Section A. – General Requirements

Specifications		M/D	Response	Comments
The system should:				
1.	Use codes stored in data tables that can be accessed, viewed, printed and modified by users with appropriate levels of permission.	M		
2.	Utilize ATA/VMRS repair codes and APWA or NAFA equipment class codes	M		
3.	Provide definable security to control data access at each online screen and database table by user account.	M		
4.	Store data on a Solaris based Oracle database.	D		
5.	Be designed in a client/server architecture	M		
6.	Support multiple deployments. Describe deployment options and provide a detailed list of additional software and hardware necessary to support each option.	M		
7.	An Oracle 10G database is the County's standard database and is the preferred database. The MySQL database is supported in a limited fashion by the County. A Microsoft SQL Server solution will require additional hardware and training for the County's DBA.	M		
8.	Be capable of interfacing with other applications such as automated fuel vending and general accounting systems. The requirements for import/export functions are outlined in a separate section.	M		
9.	Operate in a 32-bit environment with Windows 2000/XP Professional/Vista operating system.	M		
10.	Be tailored for use by a public fleet.	M		
11.	Use real-time processing where all files affected by a transaction are updated at the time of the actual transaction without the need for batch processing.	M		
12.	Be an off-the-shelf package with user definable configuration allowing flexibility to match site-specific processes.	M		
13.	Provide a graphics program as part of the standard software package.	M		
14.	Employ a standard graphical user interface (GUI) based on industry standard screen design techniques and principles.	M		
15.	Have a documented track record of providing at least one major system enhancement release every 2 years.	M		
16.	Include executable run time reports providing quick and easy access to comprehensive fleet and system data.	M		

17.	Include updated documentation and necessary scripts for any database structure changes.	M		
18.	Support an industry standard report writing/data retrieval tool. Please provide recommended third party product.	D		
19.	Be work order based and capable of printing detailed copies of all work.	D		
20.	Provide easy navigation within the application using standard windows functionality that allows multiple applets to display simultaneously.	M		
21.	Provide drop down lists for all codes displaying both the code and description.	M		
22.	Provide "real time" work in progress screens that display work order statuses, assigned tasks, location of work and assigned labor.	M		
23.	Provide date fields selectable from a dropdown calendar	M		
24.	Includes a "Help" button within the application	D		

Section B. – Equipment/Asset Management

	Specifications	M/D	Response	Comments
	The system should:			
1	Maintain all pertinent data on each piece of equipment including but not limited to the following fields: <ul style="list-style-type: none"> • Equipment Number [17A/N] unique number which identifies equipment • Year [4N] • Make [15 A/N] • Model [15 A/N] • VIN/Serial Number [20 A/N] unique number • License [10 A/N] unique number for license plate • Class [10 A/N] • Department [10 A/N] • Billing Code [3 A/N] billing code to define how costs captured for this piece of equipment are to be billed. Multiple user defined billing schemes must be supported. • Color [15 A/N] • 2 Location Codes (Parking slot and Site location) • Unlimited Account Codes for both Debit and Credit accounts [60 A/N] 	M		
2.	Support an equipment-specific labor rate for automatically calculating billing hours.	M		
3.	Display on the equipment screen all parts issued and the last date issued for each piece of equipment.	M		
4.	Provide the ability to define availability of each individual asset by hours, days, and holidays.	M		
5.	Provide unlimited user defined asset/equipment usage codes.	D		

6.	Provide the ability to assign an employee/driver to an asset.	D		
7.	Provide the ability to attach components expandable to multiple levels to an asset while maintaining a full asset record, warranties and PM schedules for each.	D		
8.	Provide unlimited notes capability for an asset record.	M		
9.	Have the ability to change an asset number and maintain all relevant data with the record.	M		
10.	Track up to three different fuel types for one asset record.	M		
11.	Provide the following fields for the capture of acquisition and disposal information for each asset record: <ul style="list-style-type: none"> • Acquire Date [2/2/4 N] ex. 02/21/2000 • Acquire Cost [14 Or 11.2 N] • Acquire Vendor [10 A/N] • PO Number [14 A/N] • Title [20 A/N] • In Service Date [2/2/4 N] • Life Expectancy Months [4N] • Out of Service Date [2/2/4 N] • Disposal Date [2/2/4 N] • Disposal Cost captured [14 or 11.2 N] • Dispose Vendor [10 A/N] 	M		
12.	Track multiple meter types and provide the ability to capture the following meter readings. <ul style="list-style-type: none"> • Actual Meter Reading [7 N] • Meter Reading at Acquisition [7 N] • Begin Fiscal Year Meter [7 N] • Life Expectancy by M/H [7 N] 	D		
13.	Provide the ability to replace a meter and maintain both actual and life-to-date meter reading.	D		
14.	Support the ability to bill each asset by multiple cost categories in user defined combinations of parts, labor, sublets, mileage, billing period charges, fuel, and replacement recovery.	M		
15.	Support multiple mark ups for parts, labor, fuel and sublets.	M		
16.	Track unlimited warranties for each asset by expiration date, cost, vendor, and any deductible or cost for the warranty.	M		
17.	Provide unlimited user defined codes that can be assigned by asset or by groups of assets.	M		
18.	Provide the ability to charge multiple accounts/departments by percentage of cost.	M		
19.	Provide the ability to assign both credit and debit account numbers to an asset and ability to modify with permissions.	M		
20.	Track changes in departmental ownership.	M		
21.	Store billing period charges for historical review, reproduction and reports.	M		

<p>2 2.</p>	<p>Preventive Maintenance</p> <p>a. Track unlimited PM cycles for each piece of equipment in any combination by time, meters, fuel consumption, a set monthly date, or a set annual date.</p> <p>b. Automatically update the next PM due when each job has been completed.</p> <p>c. Allow users to define the update process for calculation of next PM due using the actual transaction date and current meter or previous date and meter.</p> <p>d. Provide ability to establish a hierarchy for PM services and define the highest level for the grouping.</p> <p>e. Easily create a shop schedule for a list of PM's due.</p> <p>f. Allow the user to define what working days will be included on the schedule.</p> <p>g. Provide the ability to define the total number and type of PM services included on the schedule.</p> <p>h. Provide the ability to create a PM services repair record from the PM due listing.</p> <p>i. Provide auto email PM Due capability.</p>	<p>M</p>		
<p>2 3.</p>	<p>Provide for tracking state inspections, annual renewals, and any other site-specific inspections.</p>	<p>M</p>		
<p>2 4.</p>	<p>Vehicle Replacement</p> <p>Provide an online vehicle replacement program that displays vehicle replacement information calculated and captured from other locations in the system and provides reporting capability. Includes the following:</p> <ul style="list-style-type: none"> • Date: date that the equipment was put in service. • Cost: amount of money paid to acquire the equipment. • Maint \$ LTD: the maintenance dollars spent to date. • Inflation Rate: estimated inflation rate for the equipment. • Salvage Rate: the expected percentage of the cost that the user will get at the time the unit is sold or salvaged. This dollar amount is subtracted from the total cost of replacement. • Fund: budgetary funding code for replacement of equipment. • Major Grouping: administrative level group funding code. • Expected Life in Meters: shows the expected life from all valid meters attached to the equipment. • Expected Life in Months: the expected time, in months, that the equipment should last before replacement is necessary. • Recovery Collected: life to Date amount of recovery collected through the billing process or separate update program. 	<p>M</p>		

	<ul style="list-style-type: none"> • Condition Factor: subjective administrative level input toward equipment replacement program. 			
2 5.	<p>Automatically add to the acquisition cost any capitalization maintenance.</p> <ul style="list-style-type: none"> A. These costs should be tracked separately from maintenance and repair costs. B. recalculates when capital repairs are added. 	D		
2 6.	<p>Provides for online display of historical information for each piece of equipment including:</p> <ul style="list-style-type: none"> a. Monthly or yearly totals by fiscal year or calendar year for: <ul style="list-style-type: none"> • Fuel costs and quantity • Meter type and cost/meter • Parts • Labor • Sublet • Credit • Accident b. All parts issued to the equipment. 	M		
2 7.	<p>Display the following history fields by month or year:</p> <ul style="list-style-type: none"> • Total Maintenance and Repair: the total maintenance and repair dollars spent on this equipment. • Maintenance: the dollars spent on parts, labor and sublet costs for PM's. • Repair: dollars spent on parts, labor and sublet costs for all other repairs (non-PM's and non-accident repairs). • Accident: dollars spent on parts, labor and sublet costs for accident repairs. • Capital: dollars spent on parts, labor and sublet costs for capital repairs. • Miscellaneous Costs: dollars spent for work order miscellaneous costs such as shop supplies, environmental fees, etc. • Fuel Cost: costs associated with fuel. • Fuel Qty: quantity of fuel used for the month or year. • Meter: type of meter. • Cost/Meter: costs attributed to this meter [(Maintenance + Repair)/Meter reading]. • Meter/Gallon: costs of meter per gallon (Meter Reading/Fuel Qty.) • Parts: total dollars spent on parts for this equipment for selected period (not PM or accident part costs). • Labor: total dollars spent on labor for selected period. • Sublet: total dollars spent on sublet costs for this piece of equipment for selected period. • Credit: total number of credit dollars given on this piece of equipment. • Accident: total dollars from accidents. • Other Fluid: amount of other fluids used in 	M		

	this equipment for the selected period.			
2	Provide the ability to recuperate the costs of special tools and training needed for equipment through the use of an equipment-specific labor rate that is automatically used when maintenance is performed.	D		
8.	Provide unlimited user defined fields for each piece of equipment that are stored in a database table and provide four (4) additional fields for description and reference. (i.e. operator ID, accident xref for responsible party, etc.).	D		
2	Link equipment warranties to repair codes for tracking warranty cost information.	D		
9.	Track equipment warranties from the initial claims to re-imbursements received.	D		
3	Provide direct access to unlimited stored images associated with the piece of equipment.	D		
0.	Ability to add multiple equipment records from a template including standard fields, PM Schedules & Warranty Schedules.	M		
3				
1.				
3				
2.				
3				

Section C.—Parts Inventory and Processing:

	Specification	M/D	Response	Comments
	The system should:			
1.	Maintain all pertinent data on each part in inventory including: Part Number [27A/N] unique to one part. Part Description [40 A/N] In Stock Quantity Item Cost Part Category or classification Part Type or distinct usage Part Status % Mark Up for the individual part Location Alternate Location Vendor Cross Reference Part(s) Stock Quantities for max, low and safe. Max Issue: maximum quantity that can be issued to a work order at one time. Part Class Code Order Lead Time Unit of Issue Unit of Order Multiplier: a number used to multiply by the unit of order to equal the unit of issue.	M		
2.	Have the ability to reuse an equipment number without losing historical data on that piece of equipment.	M		
3.	Provide full audit tracking capabilities including the following adjustments by operator ID, date/time to: <ul style="list-style-type: none"> ▪ unit cost ▪ count ▪ return to inventory 	M		

	<ul style="list-style-type: none"> ▪ return to vendor ▪ deleted orders ▪ deleted receipts ▪ transfers from one storeroom to another 			
4.	Track purchases by: Vendor PO Number Order Number Vendor Invoice Date Orderer Receiver Work Order Number	M		
5.	Provide the capability to add notes to a part record.	M		
6.	Provide the capability to order, receive and issue a part on a work order from a single screen.	D		
7.	Have the capability to conduct online searches for purchases by: Invoice Number Order Number Part Number & Storeroom Part Number Purchase Order Vendor Work Order Number Part is For Work Order Shop the Part has been ordered for Technician Issued to	M		
8.	Provide the ability to search for: A. All back orders B. Orders not received C. All orders received	M		
9.	Track multiple part storerooms and carry a separate inventory in each storeroom for the same part numbers.	M		
10.	Have online search capabilities for part records for the following: Alternative Part Number: An equivalent/alternative part number. Industry Part Class Code: STD Classification Part Category: Code, which defines the manner in which parts are grouped. Part Catalog Number Description Location Manufacturer's Number: The number given to each part by the manufacturer. Material Safety Data Sheet # Part Number Part Usage Code Four (4) Site defined reference fields for parts Part Status: Status of the part, i.e. active, closed. Storeroom Vendor Part Warranty Type	M		

11.	Provide an online screen display with the following information when searching for part numbers: <ul style="list-style-type: none"> • Part Number • Storeroom • Description • Location • In-Stock Quantity • Unit Cost • Reorder, Safety and High Limits This should include the ability to go to the part record by selecting a part from the list.	M		
12.	Have the ability to print the online search display for part numbers in a user defined sort order.	D		
13.	Have the ability to conduct a wild card search on partial field information: partial description, partial part number, partial manufacturer number, etc.	M		
14.	Include the following information on the part record online, either by month or year: <ul style="list-style-type: none"> • history of the part usage (issues, issues returned • received, received returned • transferred in, transferred out • adjusted up, adjusted down • end of period quantity • costs: unit, tax, shipping • extended cost by the month or by year. 	M		
15.	Differentiate between a stocked and non-stocked part records and offer all part capabilities for both.	M		
16.	Track the issuance of all stocked and non-stocked parts to a specific piece of equipment.	M		
17.	Have the ability to change a part number and have that change be reflected for all historical data.	M		
18.	Have a part number function that merges part records into one number while still retaining historical data.	M		
19.	Have the ability to create an order for all parts at the reorder point with the option to modify it to include or exclude any part.	M		
20.	Provide an option to track warranty and receipt information for non-stocked parts' issues.	M		
21.	Price parts issued to work orders at a moving average.	M		
22.	Generate a surplus parts report tracking lack of activity for user defined periods of time.	M		
23.	Have the ability to print bin labels.	D		
24.	Provide a works list to assist in inventory counts.	M		
25.	Have the ability to list all receipts by vendor for all parts, a category of parts or specific part numbers.	M		

26.	Have the ability to generate a parts reorder list by vendor, category, part number or storeroom.	M		
27.	Provide for ABC classification of parts where classifications, "A" parts are the top 20% of inventory, "B" parts are the next 30%, and "C" parts are the bottom 50% of inventory.	D		
28.	Have the capability to issue and charge parts to an individual or department without having to charge it to a work order. All associated costs must be tracked through the billing report.	M		
29.	Allow for a user-defined reasonableness percentage check on cost per parts received.	M		
30.	Provide an online screen notes function and print capability for all part records.	M		
31.	Have the ability to identify a mark-up percentage by part number.	D		
32.	Track all credits to vendors by PO#, invoice #, date, type, and description.	M		
33.	Automatically recalculate the total on the PO # when a credit is issued by vendor.	M		
34.	Track multiple inventory storerooms and produce an audit trail for transfers among the storerooms.	D		
35.	Provide an EOQ calculation for the current values of the minimum level (reorder point), safety stock and maximum level from the actual order and issue history. <ul style="list-style-type: none"> ▪ Analyze which parts should be included in the EOQ calculation as a result of the EOQ program. ▪ Automatically enter the values for minimum, maximum and safety into the parts master record. 	D		
36.	Support a cyclical inventory capability where every part is inventoried over a user defined time period through a defined number of cycles.	M		
37.	Have a parts list capability where lists are created, stored and printed for specific repairs on specific equipment number; year, make, model; or class.	D		
38.	Provide direct access to unlimited stored images associated with each part, i.e., MSDS sheets.			
39.	Provide parts cross referencing capability	M		

Section D Technicians' Workstation:

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Provide a workstation on the shop floor so technicians can sign on/off to work orders as they begin and complete each repair.	M		
2.	Provide the ability to add notes to the work order.	M		

3.	Provide the ability to search for specific work orders and work previously performed on a piece of equipment.	M		
4.	Provide searches for specific repairs and/or timeframes on a piece of equipment by: Alternative Part Number: an equivalent part number Industry Part Class Code: STD Classification. Part Category: a code that defines the way parts are grouped. Part Catalog Number Description Location Manufacturer's Part Number Material Safety Data Sheet # Non Stock Parts Part Number Part Usage Code Four (4) site defined reference fields for parts Part Status: active, closed, etc. Storeroom Part Type Vendor Part Warranty Type	D		
5.	Provide the ability to search all assigned repairs by technician or by shop.	M		
6.	Track indirect time without opening a work order.	M		

Section E. – Work Order Management:

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Provide a simple work order add from one screen. Please describe in detail each step of this process.	M		
2.	Provide default information upon adding a work order that displays the following equipment information: year, make, model, VIN/serial number, engine size, AC, transmission size, tire size(s), fuel types, GVW, department, equipment class, site, monitor code, license number, color, status, replacement status, replacement date, warranties in effect for the equipment plus any attached component(s), PM schedule for equipment plus any attached component(s), and most recently stored meter reading(s).	M		
3.	Capture PM services, other repairs, sublets and miscellaneous costs/credits on a single work order.	D		
4.	Capture multiple repair codes on a work order (such as the inclusion of a warranty repair on a PM work order) and provide for detailed analysis by repair code.	M		
5.	Isolate all work of a specific type by a defined period and restrict the analysis to any department and/or class of equipment.	D		

6.	Allow determination of cause, repair, work order and vehicle for any defined period on all parts issued.	M		
7.	Record all commercial or sublet repairs to enable analysis by cause and repair code.	M		
8.	Link a repair to an operator/driver/employee so driver abuse and accidents are identified and/or billed back.	M		
9.	Display all active warranties and PM due messages for the equipment and associated component(s) when the work order is opened.	M		
10.	Provide job estimates that can be converted into active work orders.	D		
11.	Print lists of parts and tasks required for any specific repair code.	M		
12.	Provide the capability to view all work orders online in real time by status.	M		
13.	Provide a real time single screen review of the direct/indirect labor activities for all logged on technicians.	M		
14.	Review online all work order detail information for quality control when a work order is closed.	M		
15.	Search for a work order by each (or a combination) of the following: <ul style="list-style-type: none"> • Equipment number • Class of vehicle • Work order number • Technician identification • Date • Equipment Usage type • Repair code • Shop • Status of the work order 	M		
16.	Provide the ability for wild card (partial information) searches.	D		
17.	Provide the ability to add notes and print them separately or with the work order.	D		
18.	Provide the ability to add additionally required repairs to complete the work order.	M		
19.	Alert the user when a repair is covered under a warranty.	D		
20.	Provide the ability to defer repairs and automatically include them on the next opened work order for that piece of equipment.	D		
21.	Provide the ability to assign deferred repairs to a specific technician and/or shop.	D		
22.	Automatically display a technician specific screen listing any deferred repairs upon opening any work order.	D		
23.	Alert technicians upon sign on that assigned repairs are pending.	M		
24.	Require a specific authorization for closing a work order.	M		
25.	Require specific authorization for reopening a closed work order.	M		
26.	Provide an online summary review screen of all costs associated with each work order.	D		
27.	Allow addition of user defined costs to the work	D		

	order including description and mark ups.			
28.	Allow credits to the work order.	M		
29.	Directly produce from the work order screen existing parts and tasks lists associated with any repair. These lists may be printed or reviewed online.	D		

Section F. – Preventive Maintenance:

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Generate a PM/annual/semi annual inspection due list by department, class, shop, or date.	M		
2.	Support PM frequency by time, miles/hours, fuel consumed, or any combination thereof.	M		
3.	Automatically update when the next PM is due upon completion of the current PM.	M		
4.	Provide for PM scheduling that supports differences in age, usage and manufacturer.	M		
5.	Allow for unlimited PM's and frequency of service for each piece of equipment.	M		
6.	Track unlimited PM's for all components.	D		
7.	Provide an option for hierarchical scheduling of PM's.	M		
8.	Adjust for early/late hierarchically scheduled PM services.	M		
9.	Include all associated components in a PM due report.	M		
10.	Provide the ability for flexible PM scheduling based on shift and shop capacity.	D		
11.	Provide the ability to manage or modify scheduled PM's.	M		
12.	Provide an automatic PM Email Notification Program	M		

Section G. – Equipment Downtime/Availability Tracking:

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Allow creation of a user defined downtime calendar for each piece of equipment. Options should include hours of service and available workdays including or excluding weekends and holidays.	M		
2.	Store user defined downtime.	M		
3.	Track number of hours a work order is opened to calculate downtime for the piece of equipment.	M		
4.	Allow the administrator to define downtime statuses.	D		
5.	Provide ability to stop and re-start downtime.	D		

6.	Provide downtime analysis of work by total and averages of: <ul style="list-style-type: none"> • Equipment • Class of equipment • Work order number • Department/division 	M		
7.	Report user downtime by cause.	D		
8.	Provide an online review of downtime by status.	D		
9.	Provide the ability to track downtime on multiple work orders opened on the same piece of equipment.	M		

Section H. – Fuel Management:

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Have the capability to track all fueling purchased in-house or commercially.	M		
2.	Provide the ability to track fuel by an individual or piece of equipment.	M		
3.	Have the ability to view online fuel and operational fluids costs transactions and the accompanying meter reading.	M		
4.	Provide search capabilities for fuel transactions by site, user-selected date range or equipment number.	M		
5.	Interface with multiple onsite automated fuel systems or commercial card programs.	M		
6.	Provide the ability to manually enter fuel transactions.	M		
7.	Maintain a perpetual inventory of fuel and other operational fluids.	D		
8.	Track inventory receipts, issuances, stick readings, and allow for moving average fuel charges.	M		
9.	Track multiple alternate fuels.	M		

Section I. – Bar Coding

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Support the use of bar coding.	M		
2.	Print bar code labels including: <ul style="list-style-type: none"> • Part Number • Description • Storeroom • Bin Location • Date Part Received 	M		

Section J. – Reporting Capabilities:

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Support a standard ad hoc report writer. Please provide the name of the recommended report writer.	M		
2.	Provide standard reports that provide multiple sort and selection criteria along with drill down capabilities.	D		

Reports to be included (but not limited to):			
<u>EQUIPMENT</u>	D		
<u>Preventive Maintenance Due</u> Comprehensive list of all PM's due within a specified date range and variable percentage of meter or fuel consumption.			
<u>Equipment History Cost & Quantity</u> Detailed history of equipment costs by month and year, including all costs broken out by accident; maintenance and repair; fuel and other fluid quantities; miles per gallon and cost per mile calculations.	D		
<u>Equipment Usage</u> Miles driven within a timeframe by equipment, class, and/or department.	D		
<u>Master Equipment List</u> Includes year, make, model, department, class, and acquired date with ability to sort by license number, serial number or employee code.	M		
<u>Equipment List with Meter Information</u> Current and life-to-date meter information with ability to sort by class, year, department, shop, or site.	D		
<u>Meter Exception</u> Identifies vehicles/operators with potential invalid meter information.	D		
<u>Vehicle Replacement</u> Identifies equipment to be replaced based on: <ul style="list-style-type: none"> • In-service date and life expectancy. • Non-metered equipment. • System calculated vehicle replacement program .	M		
<u>Average Equipment Age by Class</u> Average age of all vehicles in each equipment class.	D		
<u>Equipment Audit</u> Audit trail of changes to company, department, equipment key, and deletions in the system's equipment records.	D		
<u>PM Compliance</u> Completed PM's flagging those done on time and showing the compliance percentage.	D		
<u>Mileage Exception</u> Vehicles outside the minimum and maximum meter reading limits to identify high or low usage.	D		
<u>Average Age for Disposed Equipment</u> Average age of disposed vehicles by company, department or class.	D		

Section K. – Training:

Specification		M/D	Response	Comments
<i>The vendor should:</i>				
1.	Provide onsite system training for transitioning to live production with the software. The proposed pricing should include all recommended training with a minimum of 3 days on site.	D		
2.	Provide training for all levels of users from management to shop floor technicians.	M		
3.	Provide a variety of training media including manuals, job aids and instructional CD's.	D		
4.	Provide report writer training to the software system database. Include the recommended training in the pricing section.	D		

Section L. – Customer Support:

Specification		M/D	Response	Comments
<i>The vendor should:</i>				
1.	Provide support services through an unlimited 800 line from 7:30 am to 6:00 pm EST, Monday through Friday. After hours support staff should be available.	M		
2.	Provide remote diagnostic support such as iLinc® and include as part of annual support in the service agreement.	M		
3.	Provide an onsite consultative visit each year as part of annual support.	D		

Section M. - Motor Pool:

The system must include a motor pool module which is designed to run a centralized motor pool fleet. This module must function as an integrated component of the fleet management system when installed.

	Specification	M/D	Response	Comments
<i>The system should:</i>				
1.	Display equipment availability by class, time dispatched and time returned for each location.	M		
2.	Capture reservation activity and related data to include, but not limited to: <ul style="list-style-type: none"> • department • account number • person requesting reservation • destination • driver’s name and license number • vehicle number and other identifying information • dispatch information • reservation charges 	M		
3.	Establish user defined rental rate structure by class for hourly, daily, monthly and annual rentals.	M		
4.	Establish a user-defined rate structure that takes into account free mileage or unlimited mileage for specified rentals.	M		
5.	Capture and track all costs associated with each rental.	M		
6.	Apply additional costs to each rental.	M		
7.	Bill a single rental to multiple departments/account numbers on a percentage basis.	M		
8.	Schedule pool equipment for Preventive Maintenance.	M		
9.	Provide search access to all data fields.	M		
10.	Generate management reports for: <ul style="list-style-type: none"> • reservations, by status • daily reservations updates • overdue reservations • print rental agreements 	M		

Proposal Pricing

Pricing should include full software documentation, one year of maintenance (both onsite and "800" line) and one year of updates in accordance with specifications.

Item	Description	Cost
Software Cost	Includes Server __ workstations __ fuel interface and the following modules:	
Project Management	All project management services for full implementation	
Installation of the software	__ days onsite, includes all travel and living	
Training	__ days onsite, includes all travel and living	
Additional Costs/Services		
Data Conversion	Conversion of data tables found in <u>Ultimate Fleet Analysis</u>	
Customized Services		
Report Writer Training	Training for <u>5</u> people	
Optional Modules	Please itemize	
Additional costs	Please itemize additional costs for full implementation	

Any costs that are not itemized on this bid sheet but necessary for a full implementation of the software to production will be considered standard and included in the total cost.

Total Maintenance and Support Costs

These costs are for Year 1 upon installation through Year 6.

Year 1	\$
Year 2	\$
Year 3	\$
Year 4	\$
Year 5	\$
Year 6	\$

Support Services and Maintenance Fee Includes:

Important: Update costs should be included in the maintenance costs. If not included, explain in space provided.

Source Code

Does your company have any special arrangements for customers to have access to the source code if your company becomes insolvent? Please explain and include costs, if applicable.

Training

In accordance with the specifications, a complete Training Plan should be included with your proposal and marked "Training" (see Vendor Questionnaire).

Help Line

If a 24 hour local or 1-800 "Help Line" number is not included in the support services contract, please quote costs.

Remote Diagnostic Capability

To assist in diagnosing software problems or data errors, a remote diagnostic capability should be included in the annual maintenance contract. Please provide service or method for remote diagnostics and any related costs.

Demonstration

Weber County reserves the right to request a demonstration of the system quoted.

Prices

Prices quoted shall remain valid for 180 days or proposal award, whichever comes first.

Exceptions

Any exceptions, deviations, substitutions, etc. from the organization's specifications in this proposal must be stated in a separate section. The reason(s) for the exception, deviation, or substitution are an integral part of this proposal.