



Request for Proposal

Fleet Maintenance Management Software

SIGNED PROPOSAL MUST BE RETURNED BY
5:00 PM (PST)
Wednesday, May 16, 2018

May 1, 2018

REQUEST FOR PROPOSAL
Benton County, Oregon
Fleet Services
Maintenance Management Software
RFP # BCFS201817

ADVERTISEMENT

Benton County invites a response for Request for Proposals (RFP) for Fleet Maintenance Management Software.

BRIEF DESCRIPTION OF WORK TO BE PERFORMED

Benton County is accepting proposals for the purchase of software for a Fleet Maintenance Management Information System capable of storing, managing and providing management reports on all information pertaining to vehicle/equipment and maintenance assets.

The proposed work generally consists of furnishing all labor, equipment, materials, and supervision to provide Benton County with Fleet Maintenance Management Software 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.

Specifications and proposal documents will be available on Tuesday, May 1, 2018, in the office of the Public Works Department, 360 SW Avery Avenue, Corvallis, Oregon at no cost or viewed at <https://www.co.benton.or.us/rfps>. Proposal must be in writing and marked plainly as **Fleet Maintenance Management Software, RFP # BCFS201817** and received by Keith Nicolson, Fleet Manager, Benton County Department of Public Works, 360 SW Avery Avenue, Corvallis, Oregon, 97333 or via email at: Keith.Nicolson@co.benton.or.us

By 5:00 p.m. local time on May 16, 2018

Time

Month Day Year

Benton County reserves the right to reject any or all proposals, to postpone the award of the contract for a period not to exceed one-hundred eighty (180) days, and to accept that proposal which is in the best interest of the County.

Dated this 27th day of April 2018.

By 
Debra S. Wyne
Administrative Services Manager

PUBLISH: May 1, 2018 Gazette Times

I. Project Contact Information

Benton County Public Works, Fleet Services
Keith Nicolson, Fleet Manager
360 SW Avery Avenue
Corvallis, Oregon 97333
Phone Number: 541-766-6617
E-mail: keith.nicolson@co.benton.or.us

II. Background – Fleet Services

Benton County Fleet Management Operation	
Benton County maintains the following inventory	
165	Light duty vehicles (pickup trucks, sedans, vans, minivans, SUVs, etc.)
25	Vehicles considered heavy duty (dump truck, transport tractor, paver, etc.)
8	Recreation type vehicles (ATVs, snowmobiles, Gators, motorcycles, etc.)
30	Non-motorized equipment (open trailers, enclosed trailers, mower platforms, snow plows, sander hoppers, etc.)
48	Motorized equipment (generators, lawn mowers, forklifts, boats, small power equipment, etc.)
930	In-sourced vehicles and equipment for surrounding agencies

The working environment is fairly typical of a small to medium-sized 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. In addition to the main facility, there are two satellite locations in Albany and Lebanon. Situated at our main location are gas and diesel pumps that tie into our OPW Phoenix SQL Fuel Management System and existing Fleet Collective Data Management System.

Located at the main garage is the Shop Foreman, part person and Fleet program coordinator. There is an office environment and has a parts inventory room located off of the office. Strategically located in the shop are two shared workstations for technicians to do research and with the implementation of this new system be able to log work time and parts used for their assigned jobs. At our satellite locations, there are laptops set up for the technicians to use in order to access the Fleet Management System.

The facility staff consists of one (1) shop foreman, seven (7) technicians, one (1) parts person and one (1) Fleet program coordinator (system administrator). The Fleet Manager is located at the main Benton County Fleet Services location.

Benton County has our own fueling station onsite and in addition plans to incorporate Pacific Pride Cardlock stations in the future. Our current fueling location consists of three pumps – two (2) for diesel (two (2) hoses) and one (1) for one for unleaded (one (1) hose). The new Fleet Management System should be capable of importing these fuel transactions.

Fleet Services charges time and materials for external customers and a blend of time and materials and rate structure for internal users. Currently internal and external customers are invoiced on a per work order basis. The goal would be to convert to a monthly invoice process for both internal and external customers. The County uses Tyler Munis for its accounting software and the new Fleet system should be able to interface with this system to avoid double entry or errors.

Benton County is creating a new replacement model for all equipment. We need a system where we can enter parameters for aging, maintenance costing, fuel consumption and mileage on each vehicle type and vehicle application. A means of identifying and tracking vehicles that have reached the parameter limit(s) is needed for inspection and replacement. As a component of this, each vehicle should have a life-to-date (LTD) maintenance

tracking component. The equipment replacement fund will also be set up for individual vehicles. The proposed system should be capable of tracking monthly contributions and providing a real-time replacement balance on the equipment module.

The system should also be “scalable”. We have a couple of customer agencies also considering a fleet management software. Ideally this system would have the ability to add companies within the system, identifying permissions based on company and account

III. Organizational Layout for Fleet Information System

The facility layout is relatively simple. The shop foreman and parts person share an office and each require a PC to manage repair orders, billings and inventory, etc. The fleet manager has a separate office with a PC. In the shop are two (2) workstations used by the technicians. Those technicians will enter information on repair orders for each job. They should also be able to order parts from those locations. Additionally we have two (2) laptops for field repairs. The Fleet program coordinator is the system administrator and requires a PC to manage the Fleet software. The computers are networked to the County’s server.

IV. Project Scope

The purpose of this Request for Proposal (RFP) is to secure bids to provide Benton 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.

Benton 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 vehicle/equipment and maintenance assets.

County would desire that other agencies be able cooperate and to acquire this software for their organization under this same RFP.

The County currently uses Collective Data as its Fleet Management system. The intent would be to convert that data over to the new system.

Successful vendor will enter into a contract with county for the purchase and support of the software.

V. 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
Email
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 Benton 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, and implementation and support services. Include their qualifications and experience.
5. Describe special staffing resources available in the areas of overall Fleet Management, equipment maintenance, data mining 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 customer base in addition to including a complete customer list.
8. Provide a list of five (5) sites similar to Benton County where software and services are currently utilized, with preference to those in relatively close proximity to our location. Include contact information.

VI. General Characteristics of Product and Services

1. Describe the proposed system architecture and the language in which it is written and 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 Benton 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. Describe what documentation for in-house custom report writing is available such as ER diagrams and a data dictionary. Is there documentation available or the ability to discern the underlying database fields used on the application screens?
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 onsite visit and system review
 - Web-based technical assistance
 - Phone support for business and non-business 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 or online resources

7. Provide an outline customers would follow in the following situations:

- Reporting a problem with the software.
- Obtaining instruction/clarification on a specific system feature.
- Requesting customized reports or services.
- Obtaining professional fleet advice due to changes in the structure or political setting.
- Obtaining technical assistance in making changes in the system coding to achieve a specific objective.
- Requesting and arranging an increase/decrease in the number of workstations.
- 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 and reports administration.

VII. 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

Yes – the system currently meets this requirement and is included with the standard program at no additional cost.

Add On – the system currently meets this requirement with an add-on-module that is fully integrated. Provide a description and cost in the comments section.

Under Development – provide a description, anticipated release date and projected cost if possible.

With modification - 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.

Customizable Service – this can be accomplished through customized services. Please provide a not to exceed cost.

No – system does not meet and has no plans to meet this requirement.

VIII. Proposal Evaluation Criteria

Evaluation of the written response portion to the RFP will be based on a point system. The possible point values are listed by each evaluation category. A committee will review the responses and assign points for each category. Phase one of the evaluation will consist of a total of 400 available points. From there a short list will be established of no more than three vendors to move on to Phase 2 which will consist of a live web-based demonstration. This phase will consist of a total of 200 available points.

Phase 1

PRICING. (0-100 Points)

- System price (0-75 Points)
- Annual system support (0-25)

CONFORMANCE TO SPECIFICATIONS. (0-135 Points)

- Ability to meet the specifications as outlined (0-135 Points)

REPUTATION AND EXPERIENCE. (0-70 Points)

- References (0-30 Points)
- Ease of use (0-10)
- Staff satisfaction (0-10)
- System reliability (0-10)
- Installation time (0-10)

VENDOR SUPPLIED INFORMATION. (0-40)

- Vendor questionnaire (0-20)
- General characteristics of product and service (0-20)

SUPPORT. (0-30 Points)

- Support during installation (0-10)
- Day-to-day support (0-10)
- After-hours support availability (0-10)

INSTALLATION TIMEFRAME. (0-25 Points)

- From issue of purchase order to go-live (0-25)

Phase 2

DEMONSTRATION. (0-200)

- Web-based live demonstration (0-200)

IX. Proposal Response Form (see section VII for appropriate response method.)

Item #	Specification	Response	Comments
1.0 – Equipment/Asset Management Module			
1.01	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 [17 A/N] unique number which identifies equipment ✚ Year [4 N] ✚ 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 Code [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. ✚ Company code ✚ Color [15 A/N] ✚ 2 Location Codes (Parking slot and Site location) [20 A/N] ✚ Equipment priority code [2 N] ✚ Operator [20 A/N] ✚ Unlimited Account Codes for both Debit and Credit accounts [60 A/N] 		
1.02	Display in the equipment module all parts issued and the last date issued for each piece of equipment.		
1.03	Provide the ability to define availability of each individual asset by hours, days and holidays.		
1.04	Provide unlimited user-defined asset/equipment usage codes.		
1.05	Provide the ability to assign an employee/driver to an asset.		
1.06	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.		
1.07	Provide unlimited notes capability for an asset record.		
1.08	Have the ability to change an asset number and maintain all relevant data with the record.		
1.09	Track up to three different fuel types for one asset record.		
1.10	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 [4 N] ✚ 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] 		
1.11	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] 		
1.12	Provide the ability to replace a meter and maintain both actual and life-to-date (LTD) meter reading.		
1.13	Support the ability to bill each asset by multiple cost categories in user-defined combinations of parts, labor, sublets, and mileage, billing period charges, fuel and replacement recovery.		
1.14	Support multiple mark ups for parts, labor fuel and sublets.		
1.15	Track unlimited warranties for each asset by expiration date, cost, vendor, and any deductible or cost for the warranty.		
1.16	Provide unlimited user-defined codes that can be assigned by asset or by groups of assets.		
1.17	Provide the ability to charge multiple accounts and/or departments by percentage of cost.		
1.18	Provide the ability to assign both credit and debit account numbers to an asset and ability to modify with permissions.		
1.19	Track changes in departmental ownership.		
1.20	Store billing period charges for historical review, reproduction and reports.		
1.21	<p>Preventative Maintenance Tracking</p> <ul style="list-style-type: none"> ✚ 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. ✚ Automatically update the next PM due when each job has been completed. ✚ 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. ✚ Provide ability to establish a hierarchy for PM services and define the highest level for the grouping. ✚ Easily create a shop schedule for a list of PM's due. ✚ Allow the user to define what working days will be included on the schedule. ✚ Provide the ability to define the total number and type of PM services included on the schedule. ✚ Provide the ability to create a PM services repair record from the PM due listing. ✚ Provide auto email PM Due capability. 		
1.22	Tracking of state inspections, annual fire inspections, annual renewals and any other site-specific inspections.		
1.23	<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. 		

	<ul style="list-style-type: none"> ✚ 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. ✚ Condition Factor: subjective administrative level input toward equipment replacement program. 		
1.24	<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. 		
1.25	<p>Online display of historical information for each piece of equipment including:</p> <ul style="list-style-type: none"> ✚ 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 ○ All parts issued to the equipment. 		
1.26	<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. 		

	<ul style="list-style-type: none"> ✚ 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 this equipment for the selected period. 		
1.27	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.		
1.28	Link equipment warranties to repair codes for tracking warranty cost information.		
1.29	Track equipment warranties from the initial claims to re-imburements received.		
1.30	Provide direct access to unlimited stored images associated with the piece of equipment.		
1.31	Templates – Ability to add multiple equipment records from a template including standard fields, PM Schedules & Warranty Schedules.		
1.32	Capability to add graphics, PDFs and notes to an equipment record		
1.33	Within the equipment module, the ability to run user defined queries on the fly. The query should be exportable at a minimum to Microsoft Excel and Adobe PDF		

Item #	Specification	Response	Comments
2.0 – Parts Inventory/Processing & Management Module			
2.01	Maintain all pertinent data on each part in inventory including: <ul style="list-style-type: none"> ✚ Part Number [27 A/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 		

	<ul style="list-style-type: none"> ✚ 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. 		
2.02	<p>Provide full audit tracking capabilities including the following adjustments by operator ID, date/time to:</p> <ul style="list-style-type: none"> ✚ Unit cost ✚ Count ✚ Return to inventory ✚ Return to vendor ✚ Deleted orders ✚ Deleted receipts ✚ Transfers from one storeroom to another 		
2.03	<p>Track purchases by:</p> <ul style="list-style-type: none"> ✚ Vendor ✚ PO Number ✚ Order Number ✚ Vendor ✚ Invoice ✚ Date ✚ Person placing the order ✚ Person receiver the order ✚ Work Order Number 		
2.04	Capability to add graphics, PDFs and notes to a part record.		
2.05	Provide the capability to order, receive and issue a part on a work order from a single screen		
2.06	<p>Have the capability to conduct online searches for purchases by:</p> <ul style="list-style-type: none"> ✚ 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 		
2.07	<p>Provide the ability to search for:</p> <ul style="list-style-type: none"> ✚ All back orders ✚ Orders not received ✚ All orders received 		
2.08	Track multiple part storerooms and carry a separate inventory in each storeroom for the same part numbers.		
2.09	<p>Have online search capabilities for part records for the following:</p> <ul style="list-style-type: none"> ✚ 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 		

	<ul style="list-style-type: none"> ✚ Part Warranty Type 		
2.10	<p>Provide an online screen display with the following information when searching for part numbers:</p> <ul style="list-style-type: none"> ✚ Part Number ✚ Storeroom ✚ Description ✚ Location ✚ In-Stock Quantity ✚ Unit Cost ✚ Reorder, Safety and High Limits <p>This should include the ability to go to the part record by selecting a part from the list.</p>		
2.11	Have the ability to conduct a wild card search on partial field information: partial description, partial part number, partial manufacturer number, etc.		
2.12	<p>Include the following information on the part record online, either by month or year:</p> <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. 		
2.13	Differentiate between stocked and non-stocked part records and offer all part capabilities for both.		
2.14	Track the issuance of all stocked and non-stocked parts to a specific piece of equipment.		
2.15	Have the ability to change a part number and have that change be reflected for all historical data.		
2.16	Have a part number function that merges part records into one number while still retaining historical data.		
2.17	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.		
2.18	Provide an option to track warranty and receipt information for non-stocked parts' issues.		
2.19	Price parts issued to work orders at a moving average.		
2.20	Generate a surplus parts report tracking lack of activity for user-defined periods of time.		
2.21	Have the ability to print bin labels.		
2.22	Provide a works list to assist in inventory counts.		
2.23	Have the ability to list all receipts by vendor for all parts, a category of parts or specific part numbers.		
2.24	Have the ability to generate a parts reorder list by vendor, category, part number or storeroom.		
2.25	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.		
2.26	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.		
2.27	Allow for a user-defined reasonableness percentage check on cost per parts received.		
2.28	Provide an online screen notes function and print capability for all part records.		
2.29	Have the ability to identify a mark-up percentage by part number.		
2.30	Track all credits to vendors by PO#, invoice #, date, type and description.		

2.31	Automatically recalculate the total on the PO # when a credit is issued by vendor.		
2.32	Track multiple inventory storerooms and produce an audit trail for transfers among the storerooms.		
2.33	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. 		
2.34	Support a cyclical inventory capability where every part is inventoried over a user-defined time period through a defined number of cycles.		
2.34	Have a parts list capability where lists are created, stored and printed for specific repairs on specific equipment number, year, make, model, class, etc.		
2.35	Provide direct access to unlimited stored images associated with each part, i.e., MSDS sheets.		
2.37	Provide parts cross referencing capability		
2.38	Support the use of barcoding. Print barcode labels including: <ul style="list-style-type: none"> ✚ Part Number ✚ Description ✚ Storeroom ✚ Bin Location ✚ Date Part Received 		

Item #	Specification	Response	Comments
3.0 – Technician Workstation Module			
3.01	Using a workstation on the shop floor, technicians can sign on/off to work orders as they begin and complete each repair.		
3.02	Provide the ability to add notes to the work order.		
3.03	Provide the ability to search for specific work orders and work previously performed on a piece of equipment.		
3.04	Provide searches for specific repairs and/or timeframes on a piece of equipment by: <ul style="list-style-type: none"> ✚ Alternative Part Number: an equivalent part number ✚ Industry Part Class Code. ✚ 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 ✚ Part Status: active, closed, etc. ✚ Storeroom ✚ Part Type ✚ Vendor ✚ Part Warranty Type 		
3.05	Provide the ability to search all assigned repairs by technician or by shop.		

3.06	Track indirect time without opening a work order.		
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Item #	Specification	Response	Comments
4.0 – Work Order Module			
4.01	Provide a simple work order add from one screen.		
4.02	<p>Provide default information upon adding a work order that displays the following equipment information:</p> <ul style="list-style-type: none"> ✚ 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) ✚ Most recently stored meter reading(s) 		
4.03	Capture PM services, other repairs, sublets and miscellaneous costs/credits on a single work order.		
4.04	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.		
4.05	Isolate all work of a specific type by a defined period and restrict the analysis to any department and/or class of equipment.		
4.06	Allow determination of cause, repair, work order and vehicle for any defined period on all parts issued.		
4.07	Record all commercial or sublet repairs to enable analysis by cause and repair code.		
4.08	Link a repair to an operator/driver/employee so driver abuse and accidents are identified and/or billed back.		
4.09	Display all active warranties and PM due messages for the equipment and associated components when the work order is opened.		
4.10	Provide job estimates that can be converted into active work orders.		
4.11	Print lists of parts and tasks required for any specific repair code.		
4.12	Provide the capability to view all work orders online in real time by status.		
4.13	Provide a real-time single screen review of the direct/indirect labor activities for all logged on technicians.		
4.14	Review online all work order detail information for quality control when a work order is closed.		
4.15	Search for a work order by each (or a combination) of		

	<p>the following:</p> <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 		
4.16	Provide the ability for wild card (partial information) searches.		
4.17	Provide the ability to add notes and print them separately or with the work order.		
4.18	Provide the ability to add additionally required repairs to complete the work order.		
4.19	Alert the user when a repair is covered under a warranty.		
4.20	Provide the ability to defer repairs and automatically include them on the next opened work order for that piece of equipment.		
4.21	Provide the ability to assign deferred repairs to a specific technician and/or shop.		
4.22	Automatically display a technician specific screen listing any deferred repairs upon opening any work order.		
4.23	Alert technicians upon sign on that assigned repairs are pending.		
4.24	Require a specific authorization for closing a work order.		
4.25	Require specific authorization for reopening a closed work order.		
4.26	Provide an online summary review screen of all costs associated with each work order.		
4.27	Allow addition of user-defined costs to the work order including description and mark ups.		
4.28	Allow credits to the work order.		
4.29	Directly produce from the work order screen existing parts and tasks lists associated with any repair. These lists may be printed or reviewed online.		
4.30	Ability to create estimates for repairs on a separate tab from the work order.		

Item #	Specification	Response	Comments
5.0 – Preventative Maintenance			
5.01	Generate a PM/annual/semiannual inspection due list by department, class, shop or date.		
5.02	Support PM frequency by time, miles/hours, fuel consumed or any combination thereof.		
5.03	Automatically update when the next PM is due upon completion of the current PM.		
5.04	Provide for PM scheduling that supports differences in age, usage and manufacturer.		
5.05	Allow for unlimited PM's and frequency of service for each piece of equipment.		
5.06	Track unlimited PM's for all components.		
5.07	Provide an option for hierarchical scheduling of PM's.		
5.08	Adjust for early/late hierarchically scheduled PM services.		

5.09	Include all associated components in a PM due report.		
5.10	Provide the ability for flexible PM scheduling based on shift and shop capacity.		
5.11	Provide the ability to manage or modify scheduled PM's.		
5.12	Provide an automatic PM Email Notification Program.		

Item #	Specification	Response	Comments
6.0 – Availability and Downtime Tracking			
6.01	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.		
6.02	Store user-defined downtime.		
6.03	Track number of hours a work order is opened to calculate downtime for the piece of equipment.		
6.04	Allow the administrator to define downtime statuses.		
6.05	Provide ability to stop and re-start downtime.		
6.06	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 		
6.07	Report user downtime by cause.		
6.08	Provide an online review of downtime by status.		
6.09	Provide the ability to track downtime on multiple work orders opened on the same piece of equipment.		
6.10	Availability to set operational hours for employees to aid in scheduling.		
6.11	Establish criteria for holidays, vacations, etc., for staff to aid in scheduling work.		

Item #	Specification	Response	Comments
7.0 – Fuel Management Module			
7.01	Have the capability to track all fueling purchased in-house or commercially.		
7.02	Provide the ability to track fuel by an individual or piece of equipment.		
7.03	Have the ability to view online fuel and operational fluids costs transactions and the accompanying meter reading.		
7.04	Provide search capabilities for fuel transactions by: <ul style="list-style-type: none"> ✚ Site ✚ User selected date range ✚ Equipment number 		
7.05	Interface with multiple onsite automated fuel systems or commercial card programs.		
7.06	Provide the ability to manually enter fuel transactions.		
7.07	Maintain a perpetual inventory of fuel and other operational fluids.		
7.08	Track inventory receipts, issuances, stick readings and allow		

	for moving average fuel charges.		
7.09	Track multiple alternate fuels.		
7.10	Ability to verify fuel transactions and correct errors during the import process. Should have the ability to see all fueling transactions and flag/adjust the meter readings in error.		

Item #	Specification	Response	Comments
8.0 – Reporting – Reports to be included (but not limited to):			
8.01	Support a standard ad hoc report writer. Please provide the name of the recommended report writer.		
8.02	Provide standard reports that provide multiple sort and selection criteria along with drill down capabilities. Please provide a list of all standard reports		
8.03	Preventive Maintenance Due Comprehensive list of all PM's due within a specified date range and variable percentage of meter or fuel consumption.		
8.04	Equipment History Cost & Quantity Detailed history of equipment costs by month and year, including all costs broken out by: <ul style="list-style-type: none"> ✚ Accident ✚ Maintenance and repair ✚ Fuel and other fluid quantities ✚ Miles per gallon and cost per mile calculations 		
8.05	Equipment/Asset <ul style="list-style-type: none"> ✚ Usage_miles driven within a timeframe by equipment, class and/or department. ✚ Scheduled maintenance due ✚ Asset list with cost information ✚ Asset replacement ✚ Asset master list ✚ Straight line depreciation ✚ Asset inventory snapshot ✚ History report 		
8.06	Master Equipment List Includes: <ul style="list-style-type: none"> ✚ year, make, model ✚ department ✚ class ✚ acquired date with ability to sort by license number ✚ Serial number or employee code 		
8.07	Equipment List with Meter Information Current and life-to-date meter information with ability to sort by class, year, department, shop or site.		
8.08	Fuel <ul style="list-style-type: none"> ✚ Meter Exception – Identifies vehicles/operators with potential invalid meter information. ✚ Fuel transaction report ✚ Non-fueled assets ✚ Fuel usage detail 		
8.09	Vehicle Replacement 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 		
8.10	Average Equipment Age by Class Average age of all vehicles in each equipment class.		

8.11	<u>Equipment Audit</u> Audit trail of changes to company, department, equipment key and deletions in the system's equipment records.		
8.12	<u>PM Compliance</u> Completed PM's flagging those done on time and showing the compliance percentage.		
8.13	<u>Mileage Exception</u> Vehicles outside the minimum and maximum meter reading limits to identify high or low usage.		
8.14	<u>Average Age for Disposed Equipment</u> Average age of disposed vehicles by company, department or class.		
8.15	<u>Downtime Tracker</u> Tracking the amount of time in days and hours that a piece of equipment was out of service and unavailable to the user during their operational timeframe.		
8.16	<u>Technician Efficiency</u> Tracking technician's individual efficiency rating against standard repair times.		
8.17	<u>Technician productivity</u> Tracking indirect vs. direct time per technicians based on available hours.		
8.18	<u>Excel</u> Ability to run customizable reports from the table files using Excel.		
8.19	<u>Operations</u> <ul style="list-style-type: none"> ✚ Comeback – track individual comebacks and shop percentages. ✚ Work order details by date report and work order ✚ Work order sublet by vendor ✚ Work order dollar summary ✚ Possible comeback report ✚ Pm labor percentage ✚ Repair reason frequency ✚ Fleet availability report ✚ Technical labor activity report 		
8.20	<u>Deferred Maintenance</u> Ability to track and report of deferred maintenance and backlog work requests.		
8.21	<u>Parts</u> <ul style="list-style-type: none"> ✚ Parts inventory ✚ Parts issue report ✚ Vendor purchase order list ✚ Parts received ✚ Orders not received ✚ Parts reorder report ✚ Part transfer report ✚ Vendor returns report ✚ Inventory count sheet ✚ Direct charge transactions ✚ Parts surplus report ✚ Parts obsolescence report ✚ Inventory movement report ✚ Part transaction detail report ✚ Inventory discrepancy report ✚ Part inventory turns report ✚ Value of perpetual inventory report 		
8.22	<u>Vehicle Utilization</u> Vehicle utilization report based on user defined parameters		
8.23	<u>Dashboard</u> A dashboard shall be provided to display at minimum the following: <ul style="list-style-type: none"> ✚ Asset availability 		

	<ul style="list-style-type: none"> ✚ Technician productivity ✚ Shop turn-around ✚ Pm compliance ✚ Cost per meter ✚ Comeback repairs ✚ Utilization ✚ Open wo by status ✚ Schedule/non-scheduled repairs comparison ✚ Vendor compliance ✚ Inventory turn ✚ Average age of asset 		
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Item #	Specification	Response	Comments
9.0 – Technology :			
9.01	Service Delivery Platform (On-prem, SaaS, hybrid etc.). Preferred: County Hosted (On-prem)		
9.02	Server O.S. platform. Preferred: Microsoft Windows Server		
9.03	Server O.S. version. Minimum: 2012 R2 or higher (64-bit) Preferred: Windows Server 2016		
9.04	Database platform and version. Minimum: Microsoft SQL Server 2008 R2 Preferred: Microsoft SQL Server 2014 Standard SP2 – SQL Server 2008 R2 goes out of support July 2019		
9.05	Server Virtualization platform. Preferred: VMWare ESXi 6.0		
9.06	Client O.S. platform and version. Minimum: Microsoft Windows 7, Microsoft Windows 8.1 v6.3 or higher Preferred: Microsoft Windows 10 v1511 or higher		
9.07	Client Internet Browser platform and version. Minimum: Internet Explorer v9, Google Chrome v60 Preferred: Internet Explorer v11 64-bit or higher, Google Chrome v61 64-bit or higher		
9.08	Directory, access, permissions and group management platform. Preferred: Microsoft Active Directory		
9.09	Directory, access, permissions and group management version. Minimum: MSAD Domain & Forest Func Level 2008 R2 Preferred: MSAD Domain & Forest Func Level 2016		
9.10	Authentication Security and Integration Methods – Access inside the local area network. Minimum: Local application authentication with secure management access, least privilege permissions managed by department sponsor in partnership with IT. Preferred: LDAP integration for Single Sign-on. Various methods. AAA through Microsoft Network Policy Server (NPS). SSH v3 or higher. Least privilege permissions managed by IT.		
9.11	Authentication Security and Integration Methods – Access outside the local area network to inside. Preferred: Application published to Citrix XenApp, access to XenApp with Citrix Receiver desktop application managed by IT with MSAD.		
9.12	Authentication Security and Integration Methods – Access inside the local area network to outside. Minimum: Outside application with local authentication, secure management of access required. Least privilege permissions managed by IT. Preferred: On-site authentication mechanism that submits an access token to the external party.		
9.13	Email client and server platform and version. Minimum Client:		

	Microsoft Outlook 2013 Preferred Client: Microsoft Outlook 2016 Server Platform: Microsoft Exchange 2016		
9.14	Desktop productivity suite platform and version. Minimum: Microsoft Office Pro Plus 2013 SP1 Preferred: Microsoft Office Pro Plus 2016		
9.15	Antivirus/Antimalware platform and version. Trend Micro OfficeScan version 12		
9.16	Network Printing. Drivers must be signed by a recognized authority, packaged and designed specifically for Preferred Server OS defined above. A 32-bit and 64-bit driver must be available. IP, Non-host- based; SNMP v2 or better reporting capabilities compatible with fmAudit software. No built-in Wifi/Bluetooth server or sources.		
9.17	Vendor Access or Remote Support. Citrix Xenapp – Remote Desktop or GoToMeeting. Staff shadow vendor technician when necessary. Enable/disable vendor specific AD account if applicable. Vendor access requirements in compliance with “Vendor Remote Access” Operating Procedure.		
9.18	Network provisioning. DMZ hosting for public access, no direct access to inside networks through firewall.		

X. Pricing

The pricing should include the full software documentation, one year of maintenance and support including any and all updates that may be required in accordance with specifications. Costs that are not itemized on this bid sheet but necessary for a full system implementation will be considered standard and included in the total cost.

Transmittal Letter

Please address your responses to:

Keith Nicolson, Benton County Fleet Services at keith.nicolson@co.benton.or.us.
Include a contact person and that person's telephone number and e-mail address.

QUOTE FORM

Qty	UOM	Item Description	Price
1	Ea.	Software/licensing cost <ul style="list-style-type: none"> ➤ Includes server ➤ Workstations ➤ OPW Phoenix SQL and Cardlock Fuel interface ➤ Tyler Munis integration 	\$
1	Ea.	Project Management <ul style="list-style-type: none"> ➤ All project management services for full implementation 	\$
1	Ea.	Full data conversion of data tables found in Collective Data	\$
1	Ea.	Full Data Conversion of attached images found in Collective	\$
1	Ea.	County assisting with conversion of data from Collective Data. Should include detailed explanation of the roles and tasks for the County.	\$
1	Ea.	Installation of software <ul style="list-style-type: none"> ➤ __days onsite, includes all travel and living 	\$
1	Ea.	Initial onsite training for Fleet and admin staff <p style="text-align: center;">days onsite, includes all travel and living</p>	\$
		Total Price	\$

Qty	UOM	Optional price options	Price
1	Ea.	Report Writer Training ➤ Training for two (2) people	\$
1	Ea.	Optional Modules ➤ Please indicate optional modules we might want to consider	\$
1	Ea.	Additional Costs ➤ Any additional costs for a full implementation not included in the above	\$
		Total Price	\$

Annual 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: Upgrade/update costs should be included in the maintenance costs where applicable. If not included as part of these fees, please explain in space below.

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.

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.

Prices

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

Company Offering Proposal:

Company Address: _____

Printed Name and Title of Authorized Representative:

Signature: _____

Contact Number(s): Telephone: _____

Cell: _____

FAX: _____

E-Mail: _____

Appendix A

Benton County IT - Vendor Remote Access Information

I. Purpose and Scope

This procedure documents the basic ways Benton County IT creates access for remote support from vendors for systems IT hosts on its network. The type of access will depend on the Vendor Managed System (VMS) category of the service, as defined in the 'SOP – Vendor Managed Systems' and where the service and its systems are hosted. A description of the agreed access and any vendor specific requirements that create individual varieties of access are to be documented in the 'Vendor Remote Access' field of the Service Asset's entry in the Service Portfolio.

II. CJIS/HIPAA Compliance

If a vendor requires access to a service that contains sensitive data, the employees of the vendor that would like access need to be trained, certified and authorized by the appropriate method. For CJIS, vendor employees need to be certified through the Sheriff's Office by completing CJIS training and an exam, submit to a background investigation, and be fingerprinted. If they are not a local vendor, the Sheriff's Office can help coordinate an authorized agency for conducting the fingerprinting that is close to their location.

For access to HIPAA, vendor employees must complete HIPAA training and an exam coordinated by Health Administration, or show proof of certification and be authorized by Health Administration.

III. Vendor Accounts

Access for some vendors may require the creation of a vendor account in the Benton County Directory system. Vendor accounts will be indicated by a vndr_ prefix.

- Access is enabled and disabled by IT. An email is generated daily by script to notify the Helpdesk which accounts have been left enabled. IT Staff will verify whether or not access is still needed for these and disable any that are not.

- Username and password must comply with county password policy.

- Related email accounts are not created with the account unless explicitly requested.

- Accounts must have rights assigned explicitly and only where absolutely needed.

- If a system that allows cached credentials with a vendor account is compromised, the vendor account will be disabled immediately and must have its password reset.

IV. Types of Access

If the service is categorized as an Independent VMS, vendors may then freely access this equipment remotely, as needed with a method provisioned by IT.

If the service is categorized as a Dependent VMS, all vendor access to these systems is be brokered by IT staff by enabling and disabling dedicated accounts that have been provisioned access via virtual private network or by accessing an application published to the public portal.

If the service is categorized as an Internalized VMS, the vendor may choose to come on site or connect to a virtual session initiated by IT Staff. All vendor activity, conducted virtually or in person will be shadowed and monitored by IT staff.