

## **REQUEST FOR PROPOSAL**

The County of Oneida seeks proposals from software vendors to furnish Computerized Maintenance Management Software suitable for managing and maintaining the Oneida County Water Pollution Control Plant assets.

### **Computerized Maintenance Management System for the Oneida County Water Pollution Control Plant RFP# 2018-238**

Copies of the subject RFP may be examined at no expense at the Oneida County Department of Water Quality & Water Pollution Control office. To request an electronic copy, contact the Oneida County Technical Assistant to the Commissioner at 315-798-5656 or see the Oneida County website at <http://www.ocgov.net> (public notice section).

Proposals must be received no later than 3:00 PM, Wednesday October 24, 2018 and addressed to:

Technical Assistant to the Commissioner  
Oneida County  
Department of Water Quality & Water Pollution Control  
51 Leland Ave. PO Box 442  
Utica, NY 13503-0442

The owner reserves the right to reject any or all proposals received.

The County of Oneida, in order to promote its established Affirmative Action Plan, invites sealed bids from minority groups. This policy regarding sealed bids and contracts applies to all persons without regard to race, creed, color, national origin, age, sex, or disability.

Dated: September 10, 2018

ONEIDA COUNTY DEPARTMENT OF WATER QUALITY  
AND WATER POLLUTION CONTROL, UTICA, NY



COMPUTERIZED MAINTENANCE MANAGEMENT SYSTEM  
REQUEST FOR PROPOSALS (RFP #2018-238)

September 10, 2018

Proposals due: October 24, 2018 at 3:00 p.m. EST

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# Section 1 - Introduction

## A. Project Background

The Oneida County Department of Water Quality and Water Pollution Control (the “County”) is in the process of a facility upgrade at their Oneida County Water Pollution Control Plant (WPCP). WPCP staff are developing an asset management program to enhance the management practices for their wastewater treatment infrastructure in order to assist staff in changing and responding to the new treatment technology. As part of this initiative, WPCP staff is adopting a computerized maintenance management system (CMMS). The purpose of this Request for Proposals (RFP) is to solicit proposals from software vendors to furnish CMMS software suitable for managing and maintaining the treatment plant assets for the WPCP. The County is requesting vendors provide both software purchase and implementation costs for their solution.

## B. Project Objectives

The intent of a new CMMS for the WPCP is to facilitate the planning, maintenance and administrative functions that are essential for proactive management of the treatment plant assets. The CMMS will serve as an operational and management tool for managing work orders and their transactional workflows, including material management, backlog management, and preventive maintenance management. The CMMS will be a primary tool used to improve maintenance productivity for the WPCP.

The treatment plant presently does not utilize any form of CMMS; however, Wonderware has been selected as the SCADA system and will have a high presence on monitors throughout the treatment plant. The selected CMMS software should have the ability to receive notifications from Wonderware SCADA so requests can come into the CMMS.

CMMS implementation activities are expected to coincide with phased construction and startup activities at the WPCP. Site work is ongoing at this time, with completion scheduled for late 2021. While the purchase, installation and initial usage of the CMMS is planned for 2019, expansion and training will continue over the following two years.

Key features that must be provided by the CMMS software include:

- A. Work Orders: Planning, scheduling, assigning personnel or crews, reserving materials, recording costs, and tracking relevant information, such as the problem/malfunction cause, downtime involved, and recommendations for future action. Receiving work requests and, when appropriate, converting work requests into work orders.
- B. Preventive Maintenance: Generating work orders based on a variety of triggers to perform inspections, lubrication, cleaning, overhauls, etc. Creating step-by-step instructions or checklists, maintaining lists of materials required per type of activity/job, and other pertinent details.
- C. Asset Management: Recording data about assets (pumps, tanks, etc.) including locations, specifications, construction history, warranty information, service contracts, spare parts, purchase date, expected lifetime, maintenance history, failure history, condition scores, risk scores, and other information helpful to work order and asset life cycle management.

- D. Inventory Control: Management of spare parts, tools, and other materials including the reservation of materials for particular jobs, tracking where materials are stored, determining when more materials should be purchased, tracking shipment receipts, and tracking inventory.

## Section 2 – Detailed Submittal Requirements

### A. Key Dates

The following represents the County’s best estimates of the key dates in the CMMS selection process. The following Project schedule is tentative and non-binding:

Request for proposals issued.....	September 10, 2018
Deadline for submittal of any questions.....	October 4, 2018
Proposals due .....	October 24, 2018
Notification of vendors selected to perform software demonstrations .....	November 21, 2018
Software demonstrations completed .....	January 18, 2018
Notice of Award to selected vendor .....	May 10, 2019
Contract negotiations completed and contract signed .....	June 14, 2019
CMMS implementation begins .....	July 29, 2019
CMMS implementation completed .....	Spring 2021

### B. Obtaining Electronic Files

This RFP and all Appendices will be distributed only as digital files. For access to the RFP and associated files go to <http://www.ocgov.net> (Business >> Available RFP’s).

### C. Proposal Format and Detail

Proposers should prepare their proposals in accordance with the instructions outlined in this section. Oneida County is seeking responses to this RFP that are brief, not to exceed 50 pages, relevant, clear, organized, comprehensive, and tailored to this RFP, using the content organization described below. Vendors whose proposals are missing relevant information may be considered unresponsive. Utmost attention should be given to accuracy, completeness, and clarity of content. All parts, pages, figures, or tables should be numbered and clearly labeled. Response information should be limited to pertinent information only. Marketing and sales type information is not to be included.

The proposal should be organized into the following sections:

- Section A - Vendor Background, Experience and Services;
- Section B - Product;
- Section C – Responses to the County’s Functional / Technical Requirements (see RFP Appendix A);
- Section D - Total System / Services Costs (see RFP Appendix B); and
- Section E – Required Signature Forms; (see RFP Appendices C-E).

- Section F – NYS EFC Requirements
- Section G – Supporting Documentation

Omissions and incomplete answers will be deemed unresponsive.

## **Part A – Vendor Background, Experience and Service**

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 the WPCP’s CMMS objectives.
3. Provide a history of your company and the proposed software.
4. Financial Stability – Demonstrate the financial wherewithal to execute this Project and support the product for a minimum of 5 years. If public, provide a website link to your audited annual investment reports for the last three (3) years. If private, attach audited financial statements for the last three (3) years.
5. Describe the professional staff available for development, training, implementation, and support services. Include their qualifications and experience and where they are located.
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 productivity.
7. Provide a list of five (5) sites similar to WPCP where software and services are currently utilized, with preference to those in relatively close proximity to our location. Include reference contact information, as any reference provided may be contacted.

## **Part B – Product**

1. Identify the software by commercial name.
2. Discuss product enhancement updates with regard to frequency and cost to existing customers with maintenance.

3. Discuss the software’s capabilities to provide purchasing and finance functions. If presently not available, is it in future product releases?
4. 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.
5. 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.
6. Describe System Administration, to include setup and maintenance, reports administration, and disaster recovery and backup.
7. Describe any integral capabilities inherent to the product not specifically delineated in this RFP that could affect the scope, schedule and budget to perform the described work.
8. Detail all hardware requirements to implement the CMMS including local storage of hardware and data. Hosted solution is not a preferred option.
9. What does the product offer as far as bar code reading and printing capabilities for inventory control?

**Part C – Responses to WPCP’s Functional / Technical Requirements**

Responses to the functional/technical requirements listed in RFP Appendix A – WPCP CMMS Software Specifications should be provided in this section of the proposal. The following response key code must be used when responding to the requirements:

S	Supported in standard configuration
C	Supported with minor modifications to standard configuration
F	Supported in future version (provide release date)
R	Support through custom report development
M	Supported with modification (customization)
T	Supported with 3 <sup>rd</sup> party or partner product
N	Not supported

Responses should be entered in the spreadsheet provided (available electronically) in the ‘supported’ column. Proposers must use one code only per requirement. Any requirement that is answered in any other way will be treated as a negative, non-response. Proposers may provide comments stating how the solution meets each requirement, cross-referencing specific requirement numbers. Proposers should place the response code in a separate column in bold type. The proposals submitted, including requirement responses, will be attached to the software license and implementation services contract.

All responses that indicate out-of-the-box, configurable or customizable functionality should be included in the costs submitted in this proposal. In addition, customization costs should be broken out by specific requirement. Functionality available in future versions should not be considered during response to the requirements in this proposal.

NOTE: Appendix A, the “WPCP CMMS Functional Requirements” Excel spreadsheet may be obtained free of charge by emailing Kathleen Zynda at [Kathleen.Zynda@ghd.com](mailto:Kathleen.Zynda@ghd.com). The Excel file is in Microsoft Excel 2016 file format and is 29kb in size. The file will be sent electronically, attached to an email reply, to any request received.

## **Part D – Total System / Services Costs**

Provide first year software costs and years two through five reoccurring maintenance costs, itemizing all supporting modules or Application Programming Interfaces (APIs) (including but not limited to mobile and SCADA) in the provided worksheet, Total System/Service Costs. Base software license and support on 20-25 total users, with up to 10 utilizing the system simultaneously. User-license or Enterprise License Agreements (ELA) recommendation should come from the vendor.

Include cost to provide initial software training for up to 20 users and administrator training for up to 5 users. Eight days of onsite training for user staff and administrators will be provided during the configuration of the software. Multiple visits will be provided to ensure proper knowledge to staff.

Additionally, provide a cost proposal for implementation of software. Included in the implementation costs will be the software configuration for wastewater treatment plant assets and integration with the Wonderware SCADA, system testing, reporting and end-user training.

## **Part E – Required Signature Forms**

Proposers should include signed copies of the following documents:

Proposal Submission Form - Appendix C

Addenda Receipt and Anti-Collusion - Appendix D

EEO Policy Statement, Lobbying Certification, EPA Forms 6100-2, 6100-3, 6100-4, - Appendix E

## **Part G – Supporting Documentation**

All proposers are to include a current Certificate of Insurance conforming to the requirements detailed in this RFP.

Corporate proposers are to include a New York State Certificate of Good Standing, obtainable by written request to the New York State Department of State, Division of Corporations.

## **Section 3 – Evaluation Criteria**

### **A. Selection Participants**

**Selection Committee.** The Selection Committee will be responsible for the evaluation and rating of the proposals and demonstrations and for conducting interviews. The Selection Committee is responsible for evaluating software functionality, technology architecture, implementation capabilities, value, and other selection criteria. The Selection Committee will make the final recommendation to the County for their consideration.

### **B. Evaluation of Proposals**

The vendor's proposal will be evaluated based on the criteria listed below. These criteria are provided for informational purposes and are not intended to represent an order of preference.

- Vendor background, experience, customer reference, and service.
- Clarity of Vendor's Proposal and ability of proposed system to meet the WPCP's objectives
- Product Demonstrations as requested
- Total System/Services Cost(s) in relation to products/services provided
- Compliance with functional and technical requirements
- Vendors history of responsiveness to problems before, during, and after installation
- Compliance with the general bidding requirements, general submittal requirements, and detailed submittal requirements of the RFP
- Other – Additional criteria deemed by WPCP to be relevant for selection.

### **C. Evaluation Selection Process**

Quantitative evaluation methods will be utilized to determine the vendor that represents the best value solution for the WPCP. Proposals will be reviewed and a short list of qualifying vendors will be invited to WPCP to present a scripted demonstration to present their product to the Selection Committee. The onsite demonstration shall incorporate a partial draft asset register of WPCP equipment, to be provided only for the purposes of the software demonstration. This draft register will be provided with the short list notification. A final decision will be made by the Selection Committee after the demonstrations are completed. The judgments of the evaluations by the Selection Committee shall not be subject to appeal.

### **D. Award Procedures**

The County Board of Legislators reserves the right to make an award without further discussion of the proposals received. Therefore, it is important that the proposal be submitted initially on the most favorable terms from both a technical and value standpoint.

A proposal may be rejected if it is incomplete. The County may reject any or all proposals and may waive any immaterial deviation in a proposal.

At a minimum, proposals will be evaluated based upon the criteria above, as well as assessments and comparisons that include evaluations of skills/experience, cost, client service and references, and/or other factors. The County may accept that proposal that best serves its needs, as determined by County officials in their sole discretion.

More than one proposal from an individual, firm, partnership, corporation or association under the same or different names, will not be considered.

The County may select and enter into negotiations with the next most advantageous Proposer if negotiations with the initially chosen Proposer are not successful.

## **Section 4 – General Conditions and Requirements**

### **A. Terms and Conditions**

The successful proposer shall execute a County agreement for the work. The term of contract shall be for 5 years, from date of award with the County having the option to renew in one year increments.

The County has the right to reject any or all proposals, to engage in further negotiations with any firm submitting a proposal, and/or to request additional information or clarification. The County is not obligated to accept the lowest cost proposal. The County may accept that proposal that best serves its needs, as determined by County officials in their sole discretion.

All payroll taxes, liability and worker's compensation are the sole responsibility of the Proposer. The Proposer understands that an employer/employee relationship does not exist under this contract.

## **B. Sub-Contractor/Partner Disclosure**

A single firm may propose the entire solution. If the proposal by any firm requires the use of sub-contractors, partners, and/or third-party products or services, this must be clearly stated in the proposal. The firm submitting the proposal shall remain solely responsible for the performance of all work, including work that is done by sub-contractors.

## **C. Insurance**

Provide evidence of workers' compensation insurance, general liability insurance of minimum \$1,000,000 per occurrence, automobile liability insurance of minimum \$1,000,000 per occurrence, and professional liability insurance of minimum \$1,000,000 per occurrence. The County, and its agents shall be indemnified and shall be shown as additional insured for this project.

## **D. New York State Environmental Facilities Corporation Requirements**

This project is being financed through the New York State Environmental Facilities Corporation. Program requirements are included in Appendix F, Part 2. NYSEFC and Oneida County encourages the participation of Minority and Women Business Enterprises in this solicitation. Submitters are to state in their proposal whether they are currently a NYS certified MBE or WBE firm or if their proposed team includes participation from a certified M/WBE. If M/WBE participation is anticipated, responders shall indicate anticipated value. Waivers may be sought for M/WBE participation at the County's discretion.

# **Section 5 – Proposal Submittal Deadline and Proposal Addendum Information**

## **A. Proposal Submission**

This RFP and all Appendices will be distributed only as digital files. For access to the RFP and associated files go to <http://www.ocgov.net> (Business >> Available RFP's).

Firms preparing proposals must check the website frequently to determine if any new addendums have been issued. All proposals must acknowledge all addendums that have been issued.

The proposal must be submitted electronically and in printed form. One (1) original (mark "ORIGINAL COPY") plus ten (10) hard copies and one (1) electronic copy of the proposal must be submitted. The

original proposal package must have original signatures and must be signed by a person who is authorized to bind the proposing firm. All additional proposal sets may contain photocopies of the original package.

Electronic copies of proposals and completed Excel files (Appendix A) must be submitted to the County at the e-mail address listed below. If attachments are greater than 8 MB, then provide a link to download the attachment. Packages containing bids must be sealed, marked, and addressed to **Oneida County Department of Purchasing, (6<sup>th</sup> floor) 800 Park Ave, Utica, NY 13501**. Also mark on the envelope or package, the bid reference number and the type of work for which the proposal is submitted. Proposals should be delivered to and received at the following address no later than **3:00 p.m. EST. on October 24, 2018**.

There is no expressed or implied obligation for the County to reimburse firms for any expenses incurred in preparing proposals in response to this request. All proposals and attachments submitted to the County in response to this RFP shall remain the property of the County.

All material submitted in response to this RFP and any contract that may be awarded become a matter of public record and shall be regarded as public records. The County will recognize as confidential only those elements in each response which are trade secrets as that term is defined in the law of New York and which are clearly marked as "TRADE SECRET", "CONFIDENTIAL", or "PROPRIETARY". Vague designations and blanket statements regarding entire pages or documents are insufficient and will not bind the County to protect the designated matter from disclosure.

Acceptance of a Proposal or other materials during the selection process does not constitute a contract and does not obligate the County to award funds. The County reserves the right to reject any or all proposals or to select the proposal, which in its opinion, is in the best interest of the County.

## **B. Proposal Questions**

All proposal questions must be submitted by **October 4, 2018 at 3 p.m.** EST. The primary purpose of this is to provide participating firms with the opportunity to ask questions, in writing, related to the RFP. The County will respond with an addendum within five (5) business days.

Submit questions by e-mail to both **Kathleen Zynda** at [Kathleen.Zynda@ghd.com](mailto:Kathleen.Zynda@ghd.com) and [OCSD.Bidding@ghd.com](mailto:OCSD.Bidding@ghd.com) **by the deadlines shown above**. The email should identify the RFP number and project title. All questions and answers may be posted as addenda <http://www.ocgov.net> (Business >> Available RFP's). No questions will be addressed individually or after the submission deadline.

The County may modify the RFP prior to the date fixed for submission of proposals by the issuance of an addendum.

Any addenda to these documents shall be issued in writing. No oral statements, explanations, or commitments by anyone shall be of effect unless incorporated in the written addenda. Receipt of Addenda shall be acknowledged by the Proposer on Appendix D, Addenda Receipt and Anti-Collusion form.

## Appendix A – WPCP CMMS Software Specifications

The software specifications listed in this Appendix represent the capabilities, features and requirements desired by the WPCP in the to-be-acquired CMMS software. Please note, the list represents the minimum requirements for each heading and it is expected the proposer will expand upon this list.

Instructions:

Please enter responses to the functional/technical requirements using the following response key code. Proposers must use one code only per requirement. Proposers may provide comments stating how the solution meets each requirement, cross-referencing specific requirement numbers. Proposers should place the response code in a separate column in bold type. The proposals submitted, including requirement responses, will be attached to the software license.

Response Codes

Valid Responses	Description	Comments Column
<b>S</b>	Supported in standard configuration	
<b>C</b>	Supported with minor modifications to standard configuration	Provide additional information
<b>F</b>	Supported in future version (provide release date)	Provide additional information
<b>R</b>	Support through custom report development	Provide additional information
<b>M</b>	Supported with modification (customization)	Provide additional information
<b>T</b>	Supported with 3 <sup>rd</sup> party or partner product	Provide additional information including complete descriptive information on the 3 <sup>rd</sup> party or partner product being provided
<b>N</b>	Not supported	

## General System Requirements

The County WPCP is seeking a CMMS as its tool to improve maintenance productivity. The CMMS must have mobile capability and allow users with wireless connectivity to access all system functionality throughout the WPCP. The system must have the ability to create or designate user-defined fields. Data must be stored in a way that makes it accessible for any and all reporting needs (i.e., life cycle, cost analysis, deterioration analysis, may be performed for work and maintenance over the life of the asset and not just each year.) The user interface must be aesthetically pleasing, easy to navigate, and highly configurable with the ability to access reports and display KPIs.

Requirement Number	Requirement Description	Supported	Comments
<b>General System Requirements</b>			
GS-01	User-friendly interface that's customizable		
GS-02	Ability to integrate safety information such as confined space entry permits, lock out/tag out, etc.		
GS-03	Supports simultaneous multi-user access with appropriate record locking to insure data integrity		
GS-04	Ability to identify asset work history & attributes and any pending work		
GS-05	Search, select and display assets, asset condition, work history, and pending work information		
GS-06	Capability to search and view Inspections and work order locations		
GS-07	Ability to filter and search for an asset(s)		
GS-08	Ability for user to access, maintain and edit asset information directly within the CMMS		
GS-09	Provide an audit trail for edits to service/work requests and work orders, showing the date and time a record was changed, the user who made the change, and the before and after values		
GS-10	Ability to create dashboards that display KPIs (key performance indicators)		
GS-11	Ability to customize user interface / screens		
GS-12	Ability for hosting on Oneida County server with facility staff usage via microwave/fiber communication		
GS-13	Define warranty periods for assets with notations on pending work orders		
<b>Mobile</b>			
MO-01	Supports a mobile workforce by allowing disconnected use (i.e., no internet access)		
MO-02	Ability to view work history by location		
MO-03	Wireless connectivity to use all system functions		

## Integration

WPCP does not currently utilize a CMMS system however is in the process of implementing Wonderware SCADA throughout the entire Treatment facility. The selected CMMS will need to communicate with the Wonderware SCADA and be open to other potential future integration opportunities.

Requirement Number	Requirement Description	Supported	Comments
	<b>Integration</b>		
IR-01	Easy access to other software or data for asset condition management		
IR-02	Provides tools for creating new custom integrations with other systems		
IR-03	Provide option for integration with Wonderware SCADA system.		
IR-04	Ability to trigger PMs by calendar time or equipment run time		

## Work & Asset Management

This section encompasses work and maintenance activities, inspection tasks, and operations tasks. The system must have the ability to capture all work effort: inspections or maintenance (preventive and reactive). The CMMS must have the ability to create custom fields for the different asset types. The CMMS shall provide the ability to look at time series data for certain data fields. The ultimate goal is to be able to track all costs of the work performed on an asset over multiple years as well as track the performance and condition of that asset over those years.

Requirement Number	Requirement Description	Supported	Comments
<b>Work &amp; Asset Management</b>			
WM-01	Ability to define work order activity types for any asset type defined		
WM-02	Ability to create and link parent/child relationships between work orders		
WM-03	Allows personnel to select and review work orders using multiple selections and sorting criteria		
WM-04	Automatic notification of new work orders to sender and assigned user(s)		
WM-05	Allows maintenance lead workers to enter preventive or standing maintenance rules that trigger the automatic creation of work orders		
WM-06	Preventive Maintenance includes elapsed time since the last work order was created or completed		
WM-07	Ability to schedule seasonal or cycle PMs (e.g. "between June-September")		
WM-08	Ability to track PMs by outside contractors		
WM-09	Easily identify delinquent PM work		
WM-10	View total labor hours and labor, material, and tool costs anticipated for a PM		
WM-11	Ability to attach photos and/or videos to work order		
WM-12	Identify parts required and reserves parts in inventory system; to be used for the work order or for a task within the work order		
WM-13	Identify equipment required for a selected activity		
WM-14	Includes instructions and comments to / from workers		
WM-15	Includes estimated and actual labor and equipment hours and costs associated with the work order or a task within the work order		
WM-16	Allows assignment of work orders to individuals, crews, or outside contractors		
WM-17	Display the backlog information for selected groupings. Allow users to pull up a work order from the backlog for reviews and authorization or cancellation		

Requirement Number	Requirement Description	Supported	Comments
<b>Work &amp; Asset Management</b>			
WM-18	Provide warnings if the type of work requested for an asset is addressed by an existing open work order for the same asset		
WM-19	Ability to create custom inspections		
WM-20	Ability to retrieve work history for retired, abandoned or removed assets		

## Reporting

The CMMS must provide a fast and easy means for opening and creating reports. Any user-defined fields must be reportable. The system shall allow users to schedule reports to run automatically on a defined schedule. The system is required to have a reporting capability that is easily configurable and enables the ready, routine, scheduled production of reports on work and maintenance performance and the exceptions to meeting those performance requirements.

Requirement Number	Requirement Description	Supported	Comments
	<b>Reporting</b>		
RP-01	Allow users to schedule reports to run automatically on a defined schedule for a defined distribution list		
RP-02	Ability to modify standard system reports		
RP-03	Ability to create and save custom reports		

## Materials Management

The CMMS shall have a Materials/Inventory Management component which will help the WPCP to manage their warehouse in a way that successfully balances the needs of operations and maintenance while optimizing their inventory and carrying costs. The management of spare parts, tools, and other materials including the reservation of materials for particular jobs, tracking where materials are stored, determining when more materials should be purchased, tracking shipment receipts, and tracking inventory should all be accomplished through the materials management component.

Requirement Number	Requirement Description	Supported	Comments
<b>Materials Management</b>			
MM-01	Provides inventory management capability		
MM-02	Provide real-time access to inventory information in warehouse		
MM-03	Tracks the manufacturer, model number, and preferred vendor for a part		
MM-04	Track photos of parts		
MM-05	Track additional specifications for a part (e.g., size, weight) based on a specified part type or category		
MM-06	Issue parts from a warehouse to a work order, and provide automatic processes to reduce quantity on hand and generate financial transactions to debit and credit the appropriate accounts		
MM-07	Return parts from a work order to a warehouse, and provide automatic processes to adjust quantity on hand and generate financial transactions to debit and credit the appropriate accounts		
MM-08	Total the financial transactions associated with all inventory activities (transfers, removals, returns) for all parts; provide a daily financial status summary		
MM-09	Provide automatic notification for parts reordering (with quantity) based on current quantity on hand, quantity already on order, and work order reservations		
MM-10	Ability to attach documents for materials or equipment		

## Security & Other Requirements

The CMMS must come equipped with a user friendly online help system. Additionally, an administrator shall have permission to administer accounts, group users into the WPCPs defined user groups, and grant various levels of system permissions/authorizations for each user and group. The software must provide an auditing option that will track and monitor changes to every attribute in every table.

Requirement Number	Requirement Description	Supported	Comments
<b>Security &amp; Other Requirements</b>			
SO-01	Provides online and easy to use Help system		
SO-02	Ability to customize Help system. Describe customization process for Help system		
SO-03	Provide multiple levels of system security rights such that some users can be granted the ability to edit certain types of records while other users are granted only the ability to view these records		
SO-04	Provide the ability to administer user accounts and system permissions, including:		
SO-05	-Create and change system logons (usernames) and passwords		
SO-06	-Define standard system permissions for user groups and assign users to one or more groups		
SO-07	-Monitor system usage (see who is logged on) and terminate sessions		
SO-08	-Set a time period of user inactivity after which a user will be automatically logged out of the system		
SO-09	What tools do you use to provide support? What are the turnaround times on initial response, resolution, and bug fixes/minor changes?		

## Appendix B - Total System/Services Cost

### First Year Expenses

System/Service	Cost	Comments
<b>Itemized</b> Software/Licenses by module/product – Based on 20-25 users (add additional line items as needed)		
Cost of software and SCADA-related modules		
Maintenance/Upgrades by module/product (add additional line items as needed)		
Initial Training		
Cost of API (or other software) Wonderware SCADA		
Other (explain)		
Other (explain)		
<b>TOTAL FIRST YEAR</b>		

### Renewal Expense, Per Year, for Years 2 through 5

System/Service	Cost	Comments
Itemized Software/Licenses by module/product – Based on 20-25 users (add additional line items as needed)		
Maintenance/Upgrades by module/product (add additional line items as needed)		
Other (explain)		
Other (explain)		
<b>ONE YEAR'S RENEWAL</b>		

This Proposal is submitted by:

Provider Name: \_\_\_\_\_

Representative (printed): \_\_\_\_\_

Representative (**signed**): \_\_\_\_\_

## Appendix B

### 2 - Total System/Services Cost (Implementation Services)

System/Service	Cost	Comments
System Configuration		
System Integration: SCADA		
System Testing		
Reporting		
End-User Training in Years 1, 2 and 3		
Other (explain)		
Other (explain)		
<b>TOTAL</b>		

This Proposal is submitted by:

Provider Name: \_\_\_\_\_

Representative (printed): \_\_\_\_\_

Representative (**signed**): \_\_\_\_\_

# Appendix C – Proposal Submission Form

## Computerized Maintenance Management Systems Software

This Proposal is submitted by:

Provider Name: \_\_\_\_\_

Representative (printed): \_\_\_\_\_

Representative (signed): \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

City/State/Zip: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

(Area Code) Telephone Number

Facsimile: \_\_\_\_\_

(Area Code) Fax Number

**It is understood by the Proposer that the County reserves the right to reject any and all Proposals, to make awards according to the best interest of the County, to waive formalities, technicalities, to recover and rebid this RFP. Proposal is valid for one hundred and eighty (180) calendar days from the Proposal due date.**

Proposer \_\_\_\_\_ Date \_\_\_\_\_

Authorized Signature \_\_\_\_\_

Please type or print Name \_\_\_\_\_



Appendix E – NYS EFC Program Requirements and Bid Packet  
Computerized Maintenance Management Systems Software

Refer to accompanying PDF, incorporated into this RFP