

**Halton Region - System Operations  
CMMS Proponent Response Form**

Date Submitted:  
Product Proposed:

Company Submitted By:  
Main Contact Name:

Section/ Question #	Question	Short Response (Yes/No/NA/#)	Proponent Response (Where Applicable)
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses differ.</b>			
<b>A.1 Company Profile</b>			
A.1.1	When and how was your company founded? Please provide a brief background on the company history.		
A.1.2	Describe your organizational structure, including - how your company is organized - what are the staffing levels in each organization - what is your staff turnover rate - what organizational units and levels interact with Halton Region personnel		
A.1.3	Provide a copy of your company's organizational chart. Please indicate a copy is included in your response package by placing "INCL" in column C. Label document with corresponding response number from column A.		
A.1.4	What is your core business?		
A.1.5	Where are your offices located? How many employees in each Canadian location? What has been the growth or decline in each Canadian location?		
A.1.6	Is the same company responsible for sales, consultants, installation and support? If no, please explain.		
A.1.7	Have you done any previous work with Halton Region? If yes, please explain.		

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A.1.8	What other products/services do you sell?		
A.1.9	What proportion of total sales are accounted for by the proposed product?		
<b>A.2</b>	<b>Financial Position</b>		
A.2.1	What is your company's market share? growth?		
A.2.2	What was your revenue and net income over the past 3 years?		
A.2.3	What percent of total revenue was derived from your CMMS software sales?		
A.2.4	What were your company expenditures in research and development for the last two years?		
A.2.5	Please provide a copy of your most recent audited financial statements or your financial reports for the past two years. Please indicate a copy is included in your response package by placing "INCL" in column C. Label document with corresponding response number from column A.		
<b>A.3</b>	<b>Customer Installations</b>		
A.3.1	What is the number of production installations of the proposed product (i.e., specify number of companies not sites)?		
A.3.2	How many In Canada?		
A.3.3	What water/ wastewater linear operations are using the proposed product?		

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A.3.4	How many companies have the latest version of proposed product?		
A.3.5	What is the total number of installations performed by your company?		
A.3.6	How many new customers have purchased, leased, or licensed the proposed software in the past 12 months? Name them.		
A.3.6.1	Of the total, how many were purchased?		
A.3.6.2	Of the total, how many were leased?		
A.3.6.3	Of the total, how many were ASP based?		
A.3.6.4	Of the above, how many included the following components? (provide for each line item below) - CMMS (work planning and scheduling) - Permits - Mobile solutions - Mobile solutions and full GIS functionality?		
A.3.6.5	Of the above, how many included interfaces with each of the following: (provide for each line item below) - SAP Payroll - SAP inventory - SAP fleet - SAP financial - Call Centre - CCTV - Document Management Systems		
A.3.7	How many customers have discontinued using the proposed system in the past 12 months? Name them.		

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A.3.8	Is there a user group for the proposed product? If so, describe the - group's organization, - number of companies represented, - objectives of the meetings, and - frequency of meetings.		
A.3.9	Please provide at least two references from the user group. For each user group reference, include the customer name, address, contact person and telephone number.		
<b>A.4</b>	<b>Benefits</b>		
A.4.1	What makes your proposed system superior to others?		
A.4.2	How can your proposed system help Halton Region become more productive?		
A.4.3	Provide a breakdown showing where specific cost savings and benefits can be expected, in moving from Halton Region's current environment to your proposed system.		
<b>A.5</b>	<b>References</b>		

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A.5.1	Please provide at least two of your customers as references. If possible, choose customers in the Municipal water/ wastewater linear infrastructure business and approximately the same size as Halton Region. Both references must have the proposed product installed and running in a similar system environment to Halton Region's. Both references should have had the product installed and in use for at least 12 months. Halton Region should be able to meet with each reference.		
A.5.2	For each reference please provide - name and address, - type of business, - number of employees, - hardware/operating system environment, - a list of modules installed and in production, - version number of each module, - date each module was installed, - two contact persons, - contact telephone numbers, - contact's role, - a brief description of your role in the installation and implementation of your product at their site, - which reference would be your primary and secondary choice for a site visit.		

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<b>B.1 Product Background</b>			
B.1.1	How many years has your company offered the proposed product?		
B.1.2	Was the proposed system developed internally by your company? If no, explain the origin of the product.		
B.1.3	What are the key market segments (ie, industries) served by the package?		
B.1.3.1	Do you have experts in the above industries?		
B.1.3.2	Do you have any other certified expertise (eg, user-centred design, human factors, project management, CPIM)? If yes, please describe.		
B.1.4	What is the frequency of updates?		
B.1.4.1	How many updates have been done over the last 2 years?		
B.1.4.2	What is the date of the last complete rewrite of the version proposed?		
B.1.4.3	When is the date of the next scheduled complete rewrite?		
B.1.4.4	What is the date of the last major revision of the version proposed?		
B.1.4.5	What are the dates of the next scheduled major/minor version releases?		
B.1.4.6	Briefly describe key features and functions expected in the next scheduled version release.		
B.1.5	Describe your future application development plans.		

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B.1.6	What is the availability of source code and which components of the solution can be modifiable by the user?		
B.1.7	What tools would Halton require to modify the components?		
B.1.8	Are software updates available for user download from the supported website?		
<b>B.2</b>	<b>Hardware Platform</b>		
B.2.1	Provide a detailed description of the hardware components that are required to operate the proposed system in a manner that is consistent with your proposal. At a minimum, include the following:		
B.2.1.1	The hardware platform/configuration on which your proposed system operates. In the case of multiple platforms, identify all that apply. For each, describe the relative advantages and disadvantages that pertain to your application.		
B.2.1.2	The minimum user desktop hardware environment required to run your system from a user level.		
B.2.1.3	A description of the suggested printer configuration including - type, - output volume, and - recommended duty cycle for both centrally located and local printers.		
B.2.2	Indicate hardware required to input data via bar-code readers & other hand-held devices.		
B.2.3	Indicate if your package requires proprietary run-time modules from other vendors for execution.		

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B.2.4	Indicate if the proposed product has any special workstation or networking requirements.		
B.2.5	Provide a typical hardware environment. List typical user installation areas by function, eg. supervisor's office, buyer, etc.		
B.2.6	Indicate which of the existing Halton Region hardware can be used, if any.		
B.2.7	List any other hardware that is required or recommended.		
B.2.8	List any other hardware that is optional.		
B.2.9.	Provide a detailed description of the hardware components that are required to operate the proposed system in a remote environment. Ie: Detailed description of hardware required to remotely receive and complete a work order in the field.		
<b>B.3 Software Platform Capabilities</b>			
B.3.1	Provide a detailed description of the software components that are required to operate the proposed system in a manner that is consistent with your proposal. In the case of multiple software platforms, identify all that apply. Include any software requirements for hand-held and other peripheral devices. At a minimum, include the following:		
B.3.1.1	A complete list of operating system software requirements including version and/or release numbers.		

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B.3.1.2	The minimum system software requirements required to run the system.		
B.3.2	Identify the programming language(s) used in the proposed system applications.		
B.3.3	Indicate if third-party extensions or customization of the application are possible using a 4GL or other language.		
B.3.4	In what development languages are other versions available?		
B.3.5	Indicate if the source code is available and under what conditions.		
B.3.6	Provide a complete list, including version and/or release numbers of the required - database management software, - associated report generators, and - utilities.		
B.3.7	Describe the database technology. Indicate if the data is accessible using a third-party DBMS, EIS, OLAP, or query tool, and list any of the more common ones that apply.		
B.3.8	Describe how your system handles concurrent database requests for updates from remote sites.		
B.3.9	Describe how your system handles distributed database requests for updates (if applicable).		

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B.3.10	Provide a copy of the system data model. Please indicate a copy is included in your response package by placing "INCL" in column C. Label document with corresponding response number from column A.		
B.3.11	Provide a copy of the database schema. Please indicate a copy is included in your response package by placing "INCL" in column C. Label document with corresponding response number from column A.		
B.3.12	Indicate the methodology used in the development of the proposed system.		
B.3.13	Indicate the application development tools and/or CASE tools used in the development and maintenance of the proposed system.		
B.3.14	Which tools are required for implementation?		
B.3.15	Provide a complete list of all modules needed to meet Halton Region's requirements. For each module, indicate the version and/or release number and indicate if the module is your product. If not, include the subcontractor's name.		
B.3.16	What is the number of installations where 3rd-party software was interfaced (for each module, if applicable)?		
B.3.17	Provide a history of each module release including - When were the modules first released? - How many subsequent releases have there been? - What was the reason for each new release?		

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<b>If your recommended product is available through multiple options please provide detail for each response where options/responses differ.</b>			
B.3.18	Describe your future R&D plans and priorities for product development.		
B.3.19	What report writers does the system support? Which is recommended?		

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<b>C.1 Recovery &amp; Back Up</b>			
C.1.1	Describe the restart and recovery procedures.		
C.1.2	Describe the restart and recovery procedures for on-line transactions.		
C.1.3	Describe the restart capabilities for batch programs.		
C.1.4	Describe backup procedures built into the proposed system.		
C.1.5	Identify any tools used to aid in the recovery process.		
C.1.6	For the ASP model, are scheduled maintenance shutdowns of the system required?		
C.1.6.1	If yes, how often are these done?		
C.1.6.2	Typically, what is their duration?		
C.1.6.3	When are they typically done (specify in EST time)?		
C.1.7	For the ASP model, what is your guaranteed "uptime", where system is accessible?		
C.1.8	For the ASP model, what was your percent uptime versus downtime last year?		
C.1.9	For the ASP model, do you use a 3rd party for hot site back up?		
C.1.9.1	If yes, where is it located?		
C.1.10	Can you provide backup tapes of client data upon request by the client, either by one-time request or on a pre-defined schedule basis?		
<b>C.2 Auditing and Security</b>			

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C.2.1	In general terms, identify and describe the security system used by the proposed system.		
C.2.2	Describe the security administration and maintenance procedures.		
C.2.3	Describe any audit or balancing procedures used to ensure the integrity of the database.		
C.2.4	How do you provide security outside of the application interface? Please include details specific to: Audit logs, User authentication, Access Control List (ACL), User Access Log		
<b>C.3 Documentation</b>			
C.3.1	Identify and describe the system documentation for the proposed system (i.e. models, flowcharts, dictionaries, screens, reports, and cross-references). Provide documentation samples. Please indicate a copy is included in your response package by placing "INCL" in column C. Label document with corresponding response number from column A.		
C.3.2	Identify and describe the operations documentation for the proposed system (eg. installation and restart/recovery procedures).		
C.3.3	Identify and describe the user documentation for the proposed system (i.e. user procedure manuals, on-line help facility).		
C.3.4	In what format is documentation provided (i.e. CD, manual, online, etc.)?		
C.3.5	Indicate the customization procedures used for updating the documentation.		

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C.3.6	Is the source code for Help, CBT, and other on-line documentation available?		
C.3.6.1	If yes, under what conditions?		
<b>C.4 System Interface Requirements</b>			
C.4.1	Do you have specialized software that facilitates integration with the following third-party software? If yes, list your requirements to do so.		
C.4.1.1	ESRI ARCGIS 9.1/ARCSDE 9.1		
C.4.1.2	Siebel Public Sector version 7.7.2.1		
C.4.1.3	mySAP ECC 5.0		
C.4.1.3	mySAP ERP 5.0 Business Warehouse		
C.4.2	Describe how your software integrates with wireless handheld devices (PDA), including		
C.4.2.1	PDA' s supported		
C.4.2.2	Level of sophistication of the integration		
C.4.3	Describe how your software integrates with Business Intelligence Reporting Tools, including		
C.4.3.1	Tools supported		
C.4.3.2	Requirements for integration		
C.4.4	Indicate the third-party software with which your proposed software solution has been integrated and how this was accomplished (only as it relates to Halton Region's application).		
C.4.5	Describe how your software integrates with wireless notebooks/tablets in the field including notebook/tablets supported Level of sophistication of the integration		

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<b>If your recommended product is available through multiple options please provide detail for each response where options/responses differ.</b>			
<b>D.1 Support</b>			
D.1.1	Do you have a customer service department? If yes list, standard hours of operation.		
D.1.2	Where is the primary location for application support & maintenance?		
D.1.3	Indicate the number of application software programmers/analysts at this location trained in the proposed application software.		
D.1.4	How long will the proposed release be covered by a maintenance contract after a new release is available, if the customer decides not to implement the new release.		
D.1.5	Where are your customer support services located?		
D.1.6	Do you provide customer support 7 days a week, 24 hours per day?		
D.1.7	Do you have a 24-hour technical support line accessible across Canada?		
D.1.8	Do you provide electronic support?		
D.1.9	What are the support modes?		
D.1.9.1	e-mail		
D.1.9.2	remote access		
D.1.9.3	internet		
D.1.9.4	telephone		
D.1.9.5	Other (explain)		

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D.1.10	What is the fastest way for Halton Region to obtain assistance in the event of an application software related failure, or a failure whose cause is not known? Describe how your support services would respond to such a failure. Would your technical support personnel come to our site? If so, under what conditions?		
D.1.11	What is your guaranteed service call response time?		
D.1.12	Is there a list of reported problems? If yes:		
D.1.12.1	How is it made accessible? (ie, internet, fax, etc)		
D.1.12.2	Is it accessible to all customers?		
D.1.12.3	Are suggested solutions listed?		
D.1.13	Describe the advanced features available on your company internet site including		
D.1.13.1	A "bulletin board" with up-to-date information on products, updates, etc.		
D.1.13.2	A "knowledge library", i.e., a user troubleshooting database allowing users to search for potential problems reported by other users and find solutions listed by users and your company. If yes, briefly describe.		
D.1.13.3	Other advanced features on your internet site.		
D.1.14	Do you track each user company's customer satisfaction/ loyalty with a comprehensive survey?		
D.1.14.1	If yes, are the results made public?		

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D.1.14.2	Specify the results of the last 2 years. Please confirm copy included within response package by placing "INCL" in short response column C. Label document to correspond with Section/Question # in column A.		
D.1.15	Describe the type of support available and restrictions associated with each of the following stages of implementation:		
D.1.15.1	pre-installation planning		
D.1.15.2	installing		
D.1.15.3	converting/loading data		
D.1.15.4	interfacing		
D.1.15.5	custom development and modifications		
D.1.15.6	testing		
D.1.15.7	training of personnel		
D.1.15.8	implementing the system		
D.1.15.9	maintenance		
D.1.15.10	problem solving		
D.1.15.11	on-going support		
D.1.16	Describe your method for providing system updates. What must Halton Region do to receive and load a new version, release, or a program fix of an application module? What assistance is provided?		
D.1.17	What is the testing procedure before a program fix is released to the customer?		
D.1.18	Describe your customization procedures.		
D.1.19	Describe your company's policy with regard to support of all sub-contracted software which you may propose to fulfill the requirements of this RFP.		

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D.1.20	Describe your company's policy with regard to modifications which might be made to the purchased system by a client after initial installation.		
D.1.21	What impact would such client modifications have on your system's - warranty, - upgrade capability, and - continued support for the system?		
D.1.22	Does your company provide formal channels of user communication such as regular newsletters? Describe all such communication vehicles in terms of objectives, level of detail, frequency, sample subject matter, customer response, etc.		
D.1.23	Indicate who the dedicated Account Manger will be for the Region's account.		
D.1.24	Indicate who the dedicated Support Professional(s) will be for the Region's account. Indicate when the support professional(s) achieved certification for your product. Indicate how long the proponent has employed the support professional(s).		
D.1.25	What additional full and or partime Halton resources as well as organizational structure changes would you recommend for the on-going support of your software solution (eg. do you recommend one or more maintenance planners, 1st line application support person, IT technical support or programmers)		
<b>D.2 Implementation</b>			

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D.2.1	Briefly describe your implementation process. List the main steps, or phases of implementation. Include a Gantt Chart (in MS Project, soft and hard copy format) that illustrates a proposed critical path for this project, including the start and finish times for the various tasks, the timing of meetings and workshops, and the submission of project deliverables to address all required items for successful completion of the project. Ensure timing is clearly identified and Project Team members and staff hours are allocated to QA/QC tasks as per the QA/QC needs for this assignment. Please indicate a copy is included in your response package by placing "INCL" in column C. Label document with corresponding response number from column A.		
D.2.2	Describe the support your company provides during implementation.		
D.2.3	Does your company use software to better manage the implementation?		
D.2.4	What resources are made available for implementation? List the titles or positions that are normally assigned from your company to oversee each stage of implementation.		
D.2.5	How long on average does the implementation process take for a site of similar size and other characteristics as compared to Halton Region?		
D.2.6	What are the factors on which implementation will depend, and identify those over which Halton Region has control?		
D.2.7	Do you have a rapid implementation plan?		
D.2.7.1	If yes, briefly describe.		

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D.2.7.2	How long does the rapid implementation process take compared to standard?		
D.2.8	What is the longest duration for implementation in which your company has been involved (specify in years/months or days)?		
D.2.9	What is the shortest duration of implementation in which your company has been involved (specify in years/months or days)?		
D.2.10	Describe the critical success factors for implementing your proposed system.		
D.2.11	Can you upload client data directly into your system (eg. bulk load)?		
D.2.11.1	If yes, what is the format of the data required?		
D.2.11.2	Are templates provided for the clients to input data for uploading to the system?		
D.2.11.3	What is the template software?		

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D.2.11.4	Provide a sample of the template. Please confirm copy is included within response package by placing "INCL" in short response column C. Label document with corresponding response number from column A.		
D.2.12	Is standard data applicable to our industry available from your company for such things as asset/equipment header information, Preventive Maintenance tasks, etc?		
D.2.13	Once the system has been implemented, when bringing additional entities on-line, can an entity already established be used as a template to bring a new entity on-line (i.e. copy existing setup where similar, such as security, selected equipment, etc., to assist in rapid implementation of similar data)? Note that an entity can be a business unit, plant, facility, warehouse, property, etc.		
D.2.13.1	If yes, briefly explain.		
D.2.14	Can a master "pick" list or table of values be established, from which items can be selected when setting up or adding data to an entity (eg., master list of all equipment across entities, etc.)?		
D.2.14.1	If yes, briefly explain		

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D.2.14.2	<p>If yes, availability of master list/table of the following:</p> <ul style="list-style-type: none"> <li>- Chart of Accounts</li> <li>- Part header information</li> <li>- Equipment header information</li> <li>- Equipment/component hierarchy relationships</li> <li>- Selected supplier data</li> <li>- Selected customer data</li> <li>- Health and safety information</li> <li>- Standard instructions</li> </ul>		
D.2.14.3	<p>If yes, can Halton Region limit user or user level access to select and associate data to an entity.</p>		
D.2.15	<p>Describe how your software manages entity relationships (eg, use of single database, descriptive hierarchy of relationships).</p>		
D.2.16	<p>What insight can you provide Halton Region on the data conversion or migration process, including</p> <ul style="list-style-type: none"> <li>- techniques and tactics that may be appropriate</li> <li>-tools available to migrate data from multiple data sets</li> <li>- your philosophy on data migration (eg. what data should or shouldn't be converted)</li> <li>- what criteria do you typically use to determine what data should be converted</li> <li>- how you keep costs to a minimum</li> <li>- how to ensure accurate data migration</li> </ul>		
D.2.17	<p>In general, how quickly have you implemented environments similar to Halton Region's? What is a reasonable expectation for time to complete implementation at Halton Region, given our requirements? What are the key dependencies?</p>		

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<b>If your recommended product is available through multiple options please provide detail for each response where options/responses differ.</b>			
D.2.18	Describe the role of each Project Team Member, and describe how their skills and experience relate directly to this role. Include the number of years of experience for each Project Team Member.		
D.2.19	The proponent shall submit the names and experience of all staff from all Sub-Consultants/Contractors included on the Proponents Project Team, and clearly define the scope of the Sub-Consultants/Contractors' work in the project, and the specific role of each Project Team member from each Sub-Consultant/Contractor		
<b>D.3 Training</b>			
D.3.1	Describe available methods of training (i.e. classroom, web-based, manuals, self-help CD's, CBT, etc.).		

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Yes/No/NA/#)	Proponent Response (Where Applicable)
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses differ.</b>			
D.3.2	<p>Provide a brief description of each of the training courses and services that are offered for the proposed product. Include the following information for each training course:</p> <ul style="list-style-type: none"> <li>- course title,</li> <li>- course description,</li> <li>- agenda,</li> <li>- objectives of the course,</li> <li>- type of trainee it is aimed at (i.e. end-users or trainers of end-users),</li> <li>- duration,</li> <li>- optimal class size,</li> <li>- minimum class size,</li> <li>- maximum class size,</li> <li>- training techniques and tools used in the course,</li> <li>- whether training can be conducted onsite Halton Region,</li> <li>- course locations other than onsite Halton Region,</li> <li>- minimum standard qualifications of instructors, and</li> <li>- languages in which training can be conducted.</li> </ul> <p>Supporting documentation may be included to respond to the above. If included, please note "INCL" in column C, and label document(s) with associated response number in column A.</p>		
D.3.3	<p>Describe the recommended training required to implement and operate the proposed system at Halton Region.</p>		

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Yes/No/NA/#)	Proponent Response (Where Applicable)
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses differ.</b>			
D.3.4	How much training would you recommend for the following user levels?		
D.3.4.1	For supervisor		
D.3.4.2	For planner		
D.3.4.3	For front-line employee		
D.3.4.4	For manager		
D.3.4.5	For executive		
D.3.4.6	For Call Centre personnel		
D.3.4.7	For IT staff		
D.3.4.8	For Halton Region system administrator		
D.3.4.9	Other (please specify)		

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.							
<b>E.1 Base Package</b>							
"Base package" refers to "out-of-the-box" packaged software and related packaged services, in order to meet criteria designated by the vendor as "Fully Supported" in the "Short Response" column in the detailed specification. This assumes there are no additional costs for any modifications, third-party software, customization or upgrades to meet the criteria, except as noted in Section E.2 "Options and Additions" below. Break out the base package into components, as listed below, and provide the costs associated with each. For each component, specify one-time costs separately from recurring costs, or fixed versus variable costs. Recurring costs should be stated as cost per year. If an ASP or lease option is available, a paragraph should be included specifying fixed ASP/lease costs and recurring costs. Insert additional rows and/or columns as required to enter your details.							
<b>E.1.1 Software</b>							
(Insert additional rows as required to enter your details)							
E.1.1.1	Describe all available pricing models, eg., base package price, per site, per concurrent user, per sq. ft., per license, a combination, and other.						
E.1.1.2	Provide a complete list of application modules, priced separately, should Halton Region decide to implement the application on a module by module basis over time. Insert rows below as required per application for detail entry. In the comment section, describe for each module, all relevant pricing model options and corresponding costs.						
E.1.1.3	List any third-party database software, operating software, utilities, tools, report & graphic generators, workflow engines, etc. included in the base package.						
E.1.1.4	As per Section A1.3 listing the number and type of users in System Operations & external users, list the number of licences and licence levels the Region will require and total costs.						

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.</b>							
E.1.1.5	Where different levels of licences have been identified above, include the cost per each so that the Region may add or delete licences as may be determined appropriate for phasing the implementation						
E.1.1.6	If site licenses are required, or are one of the pricing models available, indicate the site license breakpoints (eg, in number of Halton Region sites, number of concurrent users, seats, etc.), and the number of licenses required. Where applicable, list separately for LANs, WAN's, remote sites, internet-based access, etc. Note if more than one license level and break out detail for each level of license.						
E.1.1.7	If you use other pricing models, provide breakpoints where applicable (eg., if a sq ft license available, 0 sq. ft. to 100,000 sq. ft., 1,000,000 to 5,000,000 sq. ft., etc.)						
E.1.1.8	List any other variations that may exist under base package pricing, as implied by your responses to "Section V.B. - Product & Hardware Info, Subsections B.2 Hardware Platform & B.3 Software Platform Capabilities" (eg, alternate hardware platforms or configurations, programming languages, versions, operating systems, and databases).						

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.</b>							
E.1.1.9	What is the cost of the source code if it was purchased as part of the base package? What alternatives exist to purchasing source code outright? What is the cost of each alternative? Break out any source code components where applicable such as modules, tools, utilities, etc.						
E.1.1.10	For our internal use only and in order to allow the Region to charge back the costs of functionality to other departments, break out the costs associated for the 3 functional requirements listed below as set out in Appendix 'F' - "Tech Spec-Team C-GIS and Asset Management" tab C2-Asset Data Analysis						
E.1.1.10.1	C.2.19 *** Ability to interface with SAP Fixed Asset Accounting, FI and CO modules (Financial Accounting and Controlling) to provide all costs associated with the repair and replacement of assets or components as captured on work orders.						
E.1.1.10.2	C.2.20 *** Ability to flag anomolous condition information concerning an asset or component and update SAP Fixed Asset Accounting accordingly (eg, premature degradation of a sewer; watermain at the end of its life expectancy of 70 years is still condition rated "good")						
E.1.1.10.3	C.2.21 *** Ability to store key information about the acquisition and valuation of each uniquely identified asset in the system.						

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.							
<b>E.1.2 Documentation</b>							
(Insert additional rows as required to enter your details)							
E.1.2.1	List all documentation included in the base package, if any, including documentation details as described in "Section V.C. - Technical Information, Subsection C.3 - Documentation" (eg, type of documentation, media, number of copies, documentation source code availability). Outline all relevant options available under the base package.						
E.1.2.2	Detail all costs associated with documentation under the base package, corresponding to the elements in E.1.2.1 above. Break out costs of all relevant options available under the base package.						
<b>E.1.3 System Interface Requirements</b>							
(Insert additional rows as required to enter your details)							
E.1.3.1	List all system interface requirements included in the base package, if any, including details described in "Section V.C. - Technical Information, Subsection C.4 - System Interface Requirements" (eg, specialized software to facilitate integration with relevant third-party software, handheld devices, reporting tools, etc., as well as existing third-party interfaces). Outline all relevant options available under the base package.						

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.</b>							
E.1.3.2	Detail all costs associated with system interface requirements under the base package, corresponding to the elements in E.1.3.1 above. Break out costs of all relevant options available under the base package.						
<b>E.1.4 Support</b>							
(Insert additional rows as required to enter your details)							
E.1.4.1	List all support included in the base package, if any, including support details as described in "Section V.D - Support Services, Subsection D.1 -Support" (eg., help desk hours of operation, 1-800 number availability, support mode, type of standard support plans available, service level to be expected, on-site versus other means of support, type of support required, reporting available, support timing during various stages of implementation and beyond, upgrade and bug fix assistance, support of third-party software and interfaces, support of customized software). Outline all relevant options available under the base package.						
E.1.4.2	Detail all costs associated with support under the base package, corresponding to the elements in E.1.4.1 above. Break out costs of all relevant options available under the base package. Break out costs of all relevant options available under the base package.						

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.							
(Insert additional rows as required to enter your details)							
<b>E.1.5</b>	<b>Implementation</b>						
E.1.5.1	List all implementation support services included in the base package, if any, including implementation support details as described in "Section V.D - Support Services, Subsection D.2 - Implementation" (eg., standard steps, implementation support software tools, number and skill level of implementation support resources for what timeframe, rapid implementation option, implementation methodology, data entry support tools such as template for bulk loading of data, templates and standard data available, data conversion, entity management tools available). Outline all relevant options available under the base package.						
E.1.5.2	List assumptions for the bundling of software modification and configuration, including developing required reports, customizing screens for each user level, setting security, and so on. For example, is there a set number of hours assumed under the base package? Is there a assumed cut-off date, beyond which mods are on an hourly basis?						

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.</b>							
E.1.5.3	Can Halton use a phased approach in implementing your proposed software solution in terms of buying greater functionality over time? If yes, in what way is this accomplished and how is it priced, for example, - Very graduated steps from a simple to a comprehensive system, priced incrementally - As above but no incremental pricing, i.e., no additional cost over base package - Phased implementation which can be done on a module by module basis, with no additional cost over base package						
E.1.5.4	Detail all costs associated with implementation under the base package, corresponding to the elements in E.1.5.1, E.1.5.2, and E.1.5.3 above. Break out costs of all relevant options available under the base package.						
<b>E.1.6 Training</b>							
(Insert additional rows as required to enter your details)							
E.1.6.1	List all training included in the base package, if any, including training details as described in "Section V.D - Support Services, Subsection D.3 -Training" (eg., quantity and duration, course subject matter, type of training, location, training requirements at each user level, instructor skill level, number of instructors, min and max class sizes). Outline all relevant options available under the base package.						

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.</b>							
E.1.6.2	Detail all costs associated with training under the base package, corresponding to the elements in E.1.6.1 above. Break out costs of all relevant options available under the base package.						
<b>E.1.7 Warranty</b>							
E.1.7.1	Describe the warranty and the conditions that apply under the base package, following the 12 month warranty period describe under Section A.8 of the RFP						
E.1.7.2	Provide any costs associated with the warranty including variations under the base package.						
<b>E.1.8 Maintenance</b>							
E.1.8.1	List all items that do and do not apply under the maintenance agreement (eg, bug fixes, updates, major and minor upgrades, releases, revisions, modifications, customization, third-party software, documentation), including any alternative base package bundling or break out options (eg, by module, by type of maintenance, inclusion/exclusion of what third-party software). Provide your definitions of terms such as bug fix, upgrade, etc.						

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.</b>							
E.1.8.2	Provide the cost of maintenance including any alternative base package bundling or breakout options corresponding to the elements in E.1.8.1 above. As well, include any pricing alternatives such as percent of purchase price for each module, percent of site license, lump sum, and so on.						
<b>E.1.9 Other</b>							
E.1.9.1	Specify all other costs that apply under the base package.						
E.1.9.2	State the total one-time cost of the base package or each base package alternative.						
E.1.9.3	State the total recurring annual cost of the base package or each base package alternative.						
<b>E.2 Options and Additions</b>							
This Subsection should include all additional products and services that are recommended, based on Halton Region's specification. Please provide pricing for each line item within the detailed specification or elsewhere in the RFP document, that is considered an addition or option outside the base package price (eg, any detailed specification criterion that was labelled "SM" - Supported with modifications, "S3" - Supported using 3rd party software, "SC" - Supported but customization required, or "FR" - Will be supported in a future release). Insert additional rows as required to enter your details.							

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.</b>							
E.2.1	Break out and cost each of the additional modules, components, functions, features, or services implied by your responses to the detailed specifications and other sections within this RFP, that are over and above the base package described and costed in Subsection E.1 above. For each line item, specify the one-time costs separate from the recurring costs. Recurring costs should be stated as costs per year. If an ASP or lease option is to be considered, a similar paragraph should be included requesting separate specification of ASP/lease costs and recurring costs. Organize the breakout in the same format as the base package breakout in Subsection E.1 above.						
<b>E.3 On-going Services</b>							
Identify the hourly rates for contracted on-going services not included in the initial quotation as described in Subsections E.1 and E.2 above. Insert additional rows as required to enter your details.							
E.3.1	Is customization offered? What is the cost per hour for each level (eg, junior analyst) and type of expertise (eg, RPG 400 relational database expertise) available?						
E.3.2	Is consultation offered? What is the cost per hour for each level (eg, senior consultant) and type of expertise (eg, scheduling module expertise) available?						
<b>E.4 General</b>							

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.</b>							
The following questions will help Halton Region identify how you typically prioritize revenue streams, and how your revenue links to performance targets achieved in partnership with your customers.							
E.4.1	What percentage of your revenue is typically for - hardware? - software licenses? - customization? - business process redesign? - implementation?						
E.4.2	Prior to implementation, what percent of installations do you set targets for the improvement of key performance measures?						
E.4.3	In previous implementations of your proposed software solution, what was the average cost savings achieved per site?						
E.4.4	In previous implementations of your proposed software solution, what is the average revenue enhancement achieved per site?						
E.4.5	How and how often do you tie performance targets to fees, including						
E.4.5.1	Percent of customers where your normal fee is conditional on meeting performance targets for the customer's operations.						
E.4.5.2	Percent of customers where a bonus is available for achieving performance hurdles.						

**Halton Region - System Operations  
CMMS Proponent Response Form**

Section/ Question #	Question	Short Response (Where Applicable)	Proponent Response (Where Applicable)	Client Hosted ASP	Vendor Hosted ASP	Client Purchase	Client Leased
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses/costing etc. differ.</b>							
E.4.5.3	Percent of customers where there is no formal linkage between the fee for services and performance targets achieved.						
E.4.5.4	Other means of tying fee for services and performance targets achieved.						
E.4.6	Would you consider tying your fee to performance targets achieved for the Halton Region's system implementation? In what way(s)?						
E.4.7	As the Region will be evaluating proposals based upon a five year total cost of ownership (TCO), Proponents are requested to provide an outline describing how pricing for additional licences, ongoing service and support, etc. would be handled for optional years four and five, i.e. once the (initial) firm (minimum) thirty-six (36) month period has ended. A preferred solution would be one that contains price constraints (such as C.P.I.) and relates future pricing to that contained in the proposal submitted by the proponent (not a future "list price").						

# Halton CMMS Project

## General IT Specification

Section/ Criteria #	Criteria	Weighting	Test Criteria	Short Response						Proponent Response (Where Applicable)
				FS	SM	S3	SC	FR	NS	
<b>If your recommended product is available through multiple options please provide detail for each response where options/responses may differ.</b>										
1.01	Must have support for MS SQLServer 2000.									
	<b>Error Checking/Messaging</b>									
	<b>Error Checking</b>									
	<b>Boolean logic</b>									
1.02	Ability to check any field for range errors using user-defined Boolean logic statement eg, check to ensure inside diameter is between 1" and 1.5" .	1	1							
1.03	Ability to check any field for range errors using a user-defined Boolean logic statement based on input for another field eg.. if inside diameter is between 1" and 1.5", then outside diameter must be between y" and z".	1	1							
1.04	Ability to check any field for format errors using a user-defined Boolean logic statement e.g. customer PO must be in format xx-nnn.	1	1							
1.05	Ability to check any field for format errors using a user-defined Boolean logic statement based on input for another field e.g. if US` address then zip code format, if Canada then postal code format.	1	1							
	<b>Equations</b>									
1.06	Ability to error check for range based on a user-defined equation e.g. outside diameter - 2 x wall thickness <= inside diameter.	1	1							
	<b>Fields</b>									
1.07	Ability to establish user-defined mandatory data entry fields, for any field in the system.	2	1							
	<b>Table lookup</b>									
1.08	Ability to add to coded field tables "on the fly" when entering data, without leaving the working screen (eg, add a problem code when entering a work order)	1	1							
1.09	Ability to error check for range based on user-defined table lookup.	5	1							
1.10	Ability to error check for logic based on user-defined table lookup e.g. cannot run 3/4" Service for a distance greater than 200 feet.	2	1							
1.11	Ability to error check for format based on user-defined table lookup.	5	1							
	<b>Error messaging</b>									
1.12	Ability to classify messages e.g. severity, action required, information only.	1	1							
1.13	Ability to colour code messages (eg, severity 1 messages are red filled)	1	1							
1.14	Ability for users to customize error or other messages.	1	1							
1.15	Ability for users to print and/or forward to administrator messages via email.	2	1							

1.16	Ability to link an error occurrence to an automatic corrective action, e.g. page operator, suggest default values, skip record(s).	1	1							
1.17	Ability to add a reference number to each error message for future reference.	1	1							
1.18	Ability to analyze errors, e.g. frequency, type, severity & user.	1	1							
1.19	Ability to provide troubleshooting suggestions and/or wizard. (eg providing the problem, the possible cause of the error and suggested actions to rectify the problem)	1	1							
1.20	Ability for users to turn on and turn off audible warnings	1	1							
	<b>Regulatory Compliance</b>									
	<b>Recording/reporting</b>									
1.21	Ability to comply with the following: - Ministry of Environment - Ministry of Labour - Ministry of Health - Ministry of Transport - Ministry of Municipal Affairs and Housing - Ministry of Energy - Department of Fisheries & Oceans - Conservation Authorities - Public Sector Accounting Board - WHIMIS - OSHA - new Privacy Act	5	1							
	<b>Other</b>									
	<b>Security</b>									
	<b>Access/entry control</b>									
1.22	Ability for a given user to assign different rights for different sites.	5	1							
1.23	Ability to secure field level data on the basis of: - individual user - user group - public authority (include/exclude all)	5	1							
1.24	Ability to secure menus based on above field level criteria.	5	1							
1.25	Ability to secure menu options based on above field level criteria.	5	1							
1.26	Ability to secure modules based on above field level criteria.	5	1							
1.27	Ability to secure screens based on above field level criteria	5	1							
1.28	Ability to secure tabs based on above field level criteria	5	1							
1.29	Ability to secure access to the following: - hotkey links - buttons - function keys	5	1							
1.30	Ability to secure access to the data level (eg, limiting access to PO's that reference a given account number)	3	1							
1.31	Ability for a user with administrative rights to create and select security profiles, that can then be applied to individuals or groups	3	1							

1.32	Ability to define rights for a given user including: - inquiry - add - change - delete - all the above - none of the above - "greyed out" - none of the above - not shown.	5	1							
1.33	For each password, ability to force users to change password within a user-defined period of time.	2	1							
1.34	Ability to accommodate a single unified password.	1	1							
1.35	Ability to leverage Windows Active Directory Authentication for single password.	5	1							
1.36	Ability to allow users to change passwords as desired.	1	1							
1.37	Ability to allow only authorized users to access the system remotely.	5	1							
	<b>Audit trail</b>									
1.38	Ability to establish an audit trail that tracks users log ins and log outs.	4	1							
1.39	Ability to establish an audit trail that tracks changes to the data base including: - view of record before the change - view of record after the change - reason for change (where exists in data base) - user ID - time and date stamp - log in work station	4	1							
1.40	Ability for user to select which areas of the database an audit trail will be established by - module - screen - field	1	1							
1.41	Ability to establish an audit trail that tracks all keystrokes for all users that have logged into the CMMS	1	1							
1.42	Ability to select data bases for turning on audit trail.	1	1							
	<b>Log-in</b>									
1.43	Ability to password protect log in with the following features: - length of password - case sensitive - number of password iterations before the same password can be re-used - user defined format for all points of entry including - remote web access - remote dial-up - mobile technology	5	1							
1.44	Ability to user define number of invalid attempts to log on.	1	1							

1.45	Ability to define action taken if number of invalid attempts exceeds user defined threshold e.g. disable user profile, disable the device.	1	1							
1.46	Ability to send immediate notification to supervisor and/or other users if log in fails.	1	1							
	<b>Password/copy Protection</b>									
1.47	Ability to nest additional passwords, e.g. electronic signature to change a permit by a supervisor	1	1							
	<b>Encryption</b>									
1.48	Ability to apply standard encryption/decryption protocols for any data transferred to and from the system	5	1							
	<b>Help</b>									
	<b>Flow Chart Help</b>									
1.49	Ability to provide extensive flowcharts showing overview of workflow & process-based help.	1	1							
1.50	Ability for users to edit flowcharts.	1	1							
1.51	Ability for the user to hot key from flowchart to detailed help text.	1	1							
	<b>On-line help</b>									
1.52	Ability to provide on line help for the following: - field - screen - menu item - module/application - function key - icon - codes	3	1							
1.53	Ability to provide the following types of help: - context-sensitive - online manual - tutorials - quick tours - embedded help panes such as at bottom of screen - coaches - electronic "cheat sheets" - micro or "bubble" help for all icons, codes, fields.	3	1							
1.54	Ability to provide a comprehensive help index.	3	1							
1.55	Ability to provide a comprehensive table of contents.	4	1							
1.56	Ability for the user to customize the help index.	1	1							
1.57	Ability for the user to customize the table of contents.	1	1							
1.58	Ability to print online help messages.	1	1							
1.59	Ability for users to edit help messages.	3	1							
1.60	Ability to see extensive examples for greater clarity on help (ie, examples provided on more than 50% of help screens)	3	1							
1.61	Ability to tailor online help to the knowledge and experience of the user (ie, as opposed to the same help for all users)	1	1							

1.62	Ability to employ a Wizard feature which guides users through pre-defined processes (eg, work order creation, work order closing, PO creation, and establishment of a work flow), including - extensive number of standard Wizards available - editing capability by the user - contains flow charts and other visual aids - assistance in data entry - assistance in evaluating optional workflows	1	1							
1.63	Ability to provide a user-definable "ticker tape" message at the bottom or top of the screen (eg, "watermain break on Bronte - details at our 9:00 am meeting")	1	1							
	<b>User Interface</b>									
	<b>Hierarchical Capabilities</b>									
1.64	Ability to create an MS Windows Explorer style lookup capability for the following hierarchies: - application menus/functions - corporate structure (ie, organizational units such as entities, business units, departments) - employees - warehouse/stores - assets & components - parts - G/L accounts - on-line help - customers - suppliers - projects - work orders - failure tree (ie, problem / cause / action taken code hierarchy) - KPI's	5	1							
1.65	Ability to toggle dynamically between multiple windows showing asset and component hierarchy and the following: - object detail - history - costs - graphics	5	1							
1.66	Ability to toggle dynamically between multiple windows showing the other hierarchies listed above and the following: - object detail - history - costs - graphics	2	1							
1.67	Ability to link hierarchy with relevant applications (e.g. parts hierarchy links to PO creation)	3	1							

1.68	Ability for users to drag and drop objects (eg, parts and assets, employees and supervisors) within the MS Explorer-style hierarchy screen - for client/server version - for the web-based version	1	1							
1.69	Ability to track change history when objects are dragged and dropped (eg, track location changes for assets or components), within the MS Explorer-style hierarchy screen, regardless of whether your CMMS is web-based or not.	1	1							
<b>Interface Features</b>										
1.70	Ability to export data to any of the following applications: - MS Word - MS Excel - MS Outlook - MS Access - MS PowerPoint - MS Visio - Visual Basic - SQL - Oracle - Palm OS	4	1							
1.71	Ability to export data in the following formats: - HTML - text - csv - tab delimited	4	1							
1.72	Ability to import data from any of the following applications: - MS Word - MS Excel - MS Outlook - MS Access - MS PowerPoint - MS Visio - Visual Basic - SQL - Oracle - AutoCAD - Palm OS	4	1							
1.73	Ability to import data in the following formats: - HTML - text - csv - tab delimited	4	1							
1.74	Ability to spell check all fields within the application	1	1							
1.75	Ability to email any screen shot or report from within the application	1	1							

1.76	Ability to provide word processing capabilities within text and alphanumeric fields, including: - formatting capability such as bold, italic, underline, superscript - font change - word wrap - delete to end of line - use of forward delete key or backspace key - pagination through extensive descriptive text one screen or page at a time - top of page - advance cursoring - select all.	2	1								
1.77	Ability to provide "auto fill" or "autocomplete" for repetitive data entry.	3	1								
1.78	Ability for users to easily customize a quick, table-driven data entry screen for any input screen.	2	1								
1.79	Ability to copy repetitive data, as a feature built into the CMMS, for ease of data entry into forms or master records (eg, entering 160 hydrants)	5	1								
1.80	Ability for user to define direction cursor moves through fields when entering data, i.e. moves in a given direction once Tab is keyed or field is filled with data.	1	1								
1.81	Ability to distinguish the following field types e.g. through shading, colour: - display only fields - mandatory - optional - default	3	1								
1.82	Ability to add to master files "on the fly" when entering data, without leaving the working screen (eg, create a new asset when entering a work order)?	1	1								
1.83	Ability to undo data entered.	5	1								
1.84	Ability to save customized data entry screens & menus under a user profile.	5	1								
1.85	Ability to receive and transmit information remotely (eg, work orders), via an interactive voice response (IVR) system	1	1								
1.86	Ability to access the system through a web browser with the same look, feel and functionality as the desktop	3	1								
	<b>Languages/Currencies</b>										
1.87	Ability to support unicode (eg, for multiple languages).	1	1								
1.88	Ability to tie language to user sign on.	1	1								
1.89	Ability to report in any system language selected.	1	1								
1.90	Ability to support multiple language data tables (eg, English and French spare part descriptions)?	1	1								
1.91	Ability to convert from one currency to another	1	1								
1.92	Ability to toggle between currencies without logging out and in.	1	1								
1.93	Ability to work with several currencies (eg, buy in Euros or Mexican Pesos and track parts usage in Cdn\$, including dealing with F/X changes from order to invoicing from suppliers)	1	1								

<b>Navigation</b>										
1.94	Ability to return to original screen after navigating through several screens.	2	1							
1.95	Ability for users to assign function keys to frequently used options.	1	1							
1.96	Ability for users to create & save keyboard macros.	1	1							
1.97	Ability for users to create & save functional macros, e.g. calculations.	1	1							
1.98	Ability to search for relevant objects.	1	1							
1.99	Ability to search for relevant objects from specific fields, e.g. lookup customer number from customer number field by hitting F1	5	1							
1.100	Ability to search for menu options.	1	1							
1.101	Ability to search using a wildcard function (eg, search part name field for "**machine" to bring up all items that end in "machine")	3	1							
1.102	Ability to do speed search on any lookup (eg, key in first 3 letters and cursor moves to corresponding record)	3	1							
1.103	Ability to easily search and replace within the CMMS (eg, replace all mentions of "Widget 101" with "Acme 200"), while minimizing the negative impact of a replacement (eg, no room on screen for replacement, handling historical data, security), for - field names - menu and screen labels - help text - data	1	1							
1.104	Ability for users to define - tabs - toolbars - menu lists	3	1							
1.105	Ability to provide a navigation pane always visible to the user (eg, down the left side of the page)	1	1							
1.106	Ability to access navigation history (eg, last 20 screens visited)	1	1							
1.107	Ability to reference an interactive "address bar" showing where you are in the application hierarchy, and allowing users to easily move backward and forward through the screens previously visited, or up and down the hierarchy	2	1							
1.108	Ability to access a user-defined standard list of links, using pull-down or button or tab or other means of accessing links	1	1							
1.109	Ability to create a list of user-defined "favourites" or "bookmarks"	3	1							
1.110	Ability for users to access a list of most frequently visited screens	1	1							
1.111	Ability for users to create a "bookmark", such as saving a screen with a PO creation in progress	3	1							
<b>Toolbars</b>										
1.112	Ability to provide multiple toolbars for functional groupings, e.g. MS copy & paste.	1	1							
1.113	Ability for users to move toolbars to different locations on the screen as required.	1	1							
1.114	Ability for users to hide and display toolbars as required.	1	1							
1.115	Ability for users to customize toolbars as required.	1	1							

1.116	Ability to use pull down menus or icons.	5	1							
1.117	Ability for users to assign smart tags to customized toolbars.	1	1							
1.118	Ability to identify icons through smart tags, e.g. text box that appears when cursor hovers over icon see Word.	1	1							
	<b>Customization</b>									
	<b>Custom Forms</b>									
1.119	Ability to easily create custom forms.	4	1							
1.120	Ability to easily create data entry forms, e.g. inspection sheets in the event of system down time.	3	1							
1.121	Ability for users to create a template for any form (eg, work order, PO, service request), including add/change/delete capability for default values, tabs, fields and field labels	3	1							
1.122	Ability to record tombstone data using a user-definable specification template, for the following: - Assets (equipment) - Components - Parts - Personnel - Facilities (eg, lighting, walls, doors)	5	1							
1.123	Ability to easily create & use web-based forms, e.g. customer order entry.	5	1							
1.124	Ability to use web-based forms without needing a software license or seat charge for every user.	5	1							
	<b>Defaults</b>									
1.125	Ability for users to return to system default settings: - screens - toolbars - menus - forms - keyboard settings - colours - etc.	2	1							
1.126	Ability for users to return to user default settings: - screens - toolbars - menus - forms - keyboard settings - colours - etc.	2	1							
1.127	Ability to define default values to individual fields based on: - most frequently used, e.g. current date - last used, e.g. last purchase price - calculated values including using Boolean logic e.g. assign macro to a field to determine product costing. - business rules e.g. GST only on Canadian sales	4	1							
	<b>Fields/labels</b>									

1.128	Ability to provide extra fields to be used as required by the user, including - unlimited number of fields added to most screens - handling table-specific data such as pieces of equipment and those specific to a specific classification or type, such as for a specific type of pump - defining security access rights equal to standard fields - establishing business rules using custom fields - defining default values - choosing from a variety of field types including date, alpha, yes/no, and descriptive	5	1							
1.129	Ability for users to customize fields without changing the source code, e.g. change from an alphanumeric field to alpha field.	5	1							
1.130	Ability for users to change field descriptions (ie, field labels), e.g. change "length" to "tube length", change "supplier lot number" to "vendor number"	3	1							
1.131	Ability to supress fields without changing the source code, e.g. greying out values on PM inspection sheets.	2	1							
	<b>General</b>									
1.132	Ability to convert from any unit of measure to another, e.g. convert pipe diameter in inches to metric.	5	3							
1.133	Ability to convert volume units to weight units given the conversion rates for different materials (eg. Granular A, Topsoil, clearstone, etc.)	5	3							
	<b>Menus</b>									
1.134	Ability for users to define their own menus and save the configuration.	2	1							
1.135	Ability to define default menus based on: - most frequently used, eg, cash receipts entry - last used - user-defined based on profile	3	1							
1.136	Ability to navigate through the system without using a mouse, e.g. "ALT F" for the "File" command.	3	1							
1.137	Ability to display the menu structure on screen.	1	1							
1.138	Ability to to travel directly between menus, e.g. type menu name on command line.	1	1							
	<b>Reports/forms</b>									
1.139	Ability to customize generic reports and save as a new report in terms of - fonts - colours - layout - data selection - full math capability such as subtotals - parameters - macros - sort criteria on any field including ranking of each sort criterion - filter on many or all fields with full Boolean logic and complex algorithms involving multiple fields, but without programming knowledge - word wrap capability for reports wider than a screen or printed page - user-defined fields	5	1							

1.140	Ability to customize generic forms and save as a new form in terms of: - fonts - colours - layout	5	1							
1.141	Ability to print elements on the form based on user-defined business rules, e.g. different headings for different geographic areas.	2	1							
1.142	Ability to customize how these reports/forms are produced including - email - website - fax - print to file - paper	3	1							
1.143	Ability to customize the view for a listing on the web-based CMMS version (ie, user can adjust column width, drag and drop columns, word wrap within a column, etc.)	1	1							
1.144	Ability to edit data while viewing in spreadsheet or list mode (eg, outstanding work orders)	2	1							
	<b>Screen</b>									
1.145	Ability to drag & drop fields & labels on screen (ie, screen painter).	5	1							
1.146	Ability to save the customized screen paint under a user profile.	5	1							
1.147	Ability to change screen appearance, e.g. fonts, colours, background, headings.	4	1							
1.148	Ability to display multiple screens open simultaneously.	5	1							
1.149	Ability to tile screens.	5	1							
	<b>Reporting</b>									
	<b>Reporting Capability</b>									
1.150	Ability to provide extensive standard reports, e.g. sales by period, inventory on hand.	3	1							
1.151	Ability for user to access & select for reporting purposes any data in the system as well as the ability to perform calculations on the selected fields.	5	1							
1.152	Ability for user to add external data, through keying in or through importing from other software, to the report, e.g. surcharge levels.	3	1							
1.153	Ability for user to export reports into any Windows-based product.	3	1							
1.154	Ability to create a report based on information shown from any on-line inquiry.	3	1							
	<b>Drill-Down</b>									
1.155	Ability to drill down on any item shown on the following: - screen inquiry - browser - standard report - customized report - report from a report writer - ad hoc query	5	1							

1.156	Ability to drill around on any item shown on a given data entry screen, report, or query (eg, when in a single equipment record and want to see the last time equipment purchased, one keystroke to view purchase history showing all PO's for that piece of equipment, one keystroke to all details on the PO, one keystroke to what other vendors can sell this equipment, one keystroke to current pricing of that piece of equipment by the alternate vendor):	3	1							
1.157	Ability to drill down on dashboards (ie, any element such as a gauge or stop sign can be drilled down to get live data, single click access to summary data regarding each element, continuous drill-down for greater detail)	2	1							
	<b>Sort/Filter</b>									
1.158	Ability for user to sort by any field.	3	1							
1.159	Ability for user to sort in any sequence, e.g. ascending, descending.	3	1							
1.160	Ability for user to filter on any field.	3	1							
1.161	Ability for user to filter using full Boolean logic.	3	1							
1.162	Ability to sort & filter the following: - all reports - all forms - all documents	3	1							
	<b>Performance Reporting</b>									
	<b>Calculations</b>									
1.163	Ability to set up key performance indicators (KPI's) by user and display on screen in the following formats: - tables - graphs - graphics - stop lights - speedometers	3	1							
1.164	Ability to provide "Business Intelligence" (ie, dashboards, stoplights, etc.) functionality including - multiple user-defined formats & icons - user-defined refresh rates - option to filter data displayed such as by exception only - display shows when measure last updated	3	1							
1.165	Ability to setup ranges for KPIs by user.	3	2							
1.166	Ability to establish equations for feeding into the KPIs by user.	3	2							
1.167	Ability to establish a hierarchy of KPIs with drill down capability.	3	1							
1.168	Ability to to track trends of KPIs as defined by users & notify others as defined by users.	3	1							
1.169	Ability to manage rounding issues (eg, double bookkeeping system must keep track of digits that are carried during currency conversions).	1	1							

1.170	Ability to provide analytics including - determine if any correlations - conduct time series analysis - run multiple linear regressions - perform probability calculations on user-defined parameters	1	1							
	<b>Output Options</b>									
1.171	Ability to generate output through the following user defined options: - on screen - email - website - fax - print to file - paper	3	1							
1.172	Ability to view all printed reports and graphs optionally on screen instead	3	1							
1.173	Ability to automatically notify user in a user specified manner when indicator enters into user specified range.	3	1							
	<b>Internet Site</b>									
1.174	Ability to set up & support an interface with the Halton website (eg, for municipalities)	1	1							
1.175	Ability to display data on the Halton website and transfer data to and from the website all in a secure environment.	1	1							
1.176	Ability to grant access to outside users of the Halton website, secured by user names and passwords.	2	1							
	<b>Workflow</b>									
1.177	Ability to define which record changes will be flagged for generating messages.	4	1							
1.178	Ability to determine to whom the messages will be sent.	4	1							
1.179	Ability to send messages to users informing them of flagged record changes.	4	1							
1.180	Ability to define business rules for: - routing documents - queuing work for users - approvals - substitute approvals - tracking current status of an object in a given workflow	4	1							
1.181	Ability to incorporate equations within business rules.	3	1							
1.182	Ability to incorporate Boolean logic within business rules, e.g. if WO value > \$2000 must be sent to the Manager	3	1							
1.183	Ability for authorized staff to reject, correct and close-out improperly completed or incomplete data entry forms (eg, Work Orders), as part of the user-defined workflow.	3	1							

1.184	Ability to accommodate electronic signatures (ie, no further add/change/delete allowed once signed) as follows: - Approvals (eg, status changes such as closing a work order or approving a purchase requisition) - Via mobile technology (eg, PDA devices) - Using user ID and password - "Unsign" capability using user ID and password, as well as reason for unsigning - Optional validation using biometric device - Record of all signing and unsigning plus comments	3	1							
1.185	Ability for user to create business rules underlying automated accounting transactions (ie, Automatic Accounting Instructions)	5	1							
1.186	Ability for user to schedule automatic processing of transactions, including - multiple user-defined date/times - user-defined frequency - user-defined blackout periods - other calendaring algorithms (eg "3:00 pm on the 2nd Monday of every other month")	4	1							
1.187	Ability to properly manage scheduled transactions, including - re-run transactions if job fails - release job prior to scheduled time, and have the option to keep the original scheduled date or not - notify job owner that job has failed	4	1							
	<b>Document Management</b>									
	<b>General</b>									
1.188	Ability to manage incoming documents as follows: - scan - print - email - restore - retrieve - annotate - index - reference back to internal document(s) - add electronic signatures	3	1							
1.189	<b>Barcode/RFID Technology</b>									
	<b>Output</b>									
1.190	Ability to create a barcode from any data in the system.	4	1							
1.191	Ability to print barcodes on any report, label or form.	4	1							
	Ability to access a data warehouse built in to the CMMS to facilitate reporting (ie, no additional presentation tool knowledge or additional cost required)	1	1							
	<b>Input</b>									
1.192	Ability to interface with - any barcode reader - any RFID reader	4	1							

1.193	Ability to enter any data from - a barcode - an RFID i.e. scanning instead of keying.	4	1							
<b>Multi-Site Management</b>										
1.194	Ability to handle the following environments (4 levels): - multi-dept - multi-plant - multi-division - multi-company	2	1							
1.195	For improved portability and customizability in a mixed user environment, ability for the web-based version to handle the following: - Runs using any operating system (eg, Linux, Unix) - Runs using any database (eg, Oracle, IBM DB2, MS SQLServer, PostgreSQL) - Runs virtually identical using any Browser or client - No additional or mandatory software on the client - Only one version of source code to handle items above	3	1							
1.196	Ability for client/server version of the CMMS to support multiple databases including - SQLServer - any other SQL database - Oracle - MS Access	3	1							
1.197	Ability for multiple sites to share common data elements such as asset classifications or part numbers & definitions - in a secure way - ensuring multiple users can edit without lockout issues	1	1							
1.198	Ability for the CMMS, using built-in utilities, to allow remote user sites to synchronize databases	1	1							
<b>Purging and Archiving</b>										
1.199	Ability to archive any data for a user-defined period.	1	1							
1.200	Ability to easily retrieve data from archive.	4	1							
1.201	Ability to maintain the integrity of any hierarchical data (eg, the G/L, A/P, and A/R hierarchy), by transaction.	4	1							
1.202	Ability to purge data for a user-defined period.	1	2							
1.203	Ability to undo the purge.	4	1							
1.204	Ability to override system date for data entry (eg, as per disaster recovery plan)	1	1							

**LEGEND:**

**Weighting = Relative importance of criterion to Halton Region**

- 1 - important
- 3 - very important
- 5 - extremely important

**Test Criteria = Testing methodology to be used for vendor demos**

- 1 - vendor to demonstrate with vendor's own data
- 2 - vendor to demonstrate with Halton Region's instruction or data
- 3 - vendor to demonstrate with Halton Region's test procedures/scenarios and Halton Region's data

**Short Response = How criterion is supported by the vendor**

- FS - Fully supported, ie, "out of the box" with no modifications
- SM - Supported with modifications, ie, no source code programming required but needs configuration change, report creation, screen painting or other mods
- S3 - Supported using 3rd party software
- SC - Supported but customization required, ie, programming changes to source code
- FR - Will be supported in a future release
- NS - Not supported