

RFP 0001-17-03 CENTRALIZED ASSET MANAGEMENT SYSTEM

Question/Concern	Section	Response
1. Attachment A mentions user counts for various software systems, but what is the anticipated user count for the new CMMS system?"	Attachment A	Possible access by nearly 160 employees: Maintenance (7), Fleet (4), Accounting (5), IT (7), FO (58), Purchasing (3), WR (42), ENG (26) and access to supervisors (6) of FS, CS and Billing.
2. Please specify which software integrations will be a part of the initial scope.		At a minimum: CIS, GIS, LIMS and ERP (Dynamics)
3. How would GW suggest bidders present the copies of the proposal and separate the sections as defined in the Response Requirements & Format.	On page 5, Number 8	Presenting the unbound proposal copies with a paper clip or binder clip is acceptable.
4. Please indicate any deadlines or requirements for go-live.	In Section 1, Project Approach: "On-time and on budget."	Responding firms should propose both the budget and expected time for completion of the project that the responding firm will be capable of abiding to.
5. For the 70 Infor users, can you provide the roles and description of the part of the software they access? For example: Operations Manager; approvals only.		Refer to attached table.
6. Please confirm the end user count for the system. Are there any users that would fall under the Limited User license category? Definition: "Limited Users are authorized to access the licensed software by limiting the usage to only the following transactions: work requests, work orders, materials requests, asset look-up, approvals, and materials/parts look-up."		Refer to attached table.
7. Which system in the current environment handles the warehouse functionalities and inventory management (Is it MS Dynamics, Infor MP2 CMMS or some other system?) - Materials receiving? - Check out and returns of parts to/from work orders? - Other warehouse functionalities such as inventory transfers, cycle counts, returns to suppliers etc.)?		Microsoft Dynamics GP

8.	What version of Esri are you using? Do you have ArcGIS Server?		We are currently using ArcGIS Server 10.3 and ArcGIS Desktop 10.1, with plans to upgrade soon.
9.	Do you manage your ArcSDE on Oracle or Sequel Server?		SQL Server
10.	How many features do you want synchronized between GIS and EAM?		>100,000 assets
11.	Are you using any existing Web GIS viewers? What viewer?		Yes. Geocortex HTML5 Viewer
12.	Are you using ArcGIS Online or Portal?		Not currently
13.	How many GIS data editors do you have using ArcGIS desktop?		Five editors using ArcGIS Desktop. Others edit data using the web map.
14.	Are there any relationship classes with data that you want linked with EAM?		No relationship classes
15.	Do you currently have a mobile GIS solution?		Yes
16.	<p>Please clarify why a daily exchange of inventory data is needed to be sent to MS Dynamics GP. It is the norm for the warehouse system to be the master in controlling the ROP/ROQ settings. It is expected that proper reorder points and reorder quantity are setup in the system that controls the warehouse (based on ABCD – XYZ properly configured for the commodities to optimize just in time on inventory), and proper requisition approval process is setup.</p> <p>Based on the above, Shouldn't the requisitions so generated by the warehouse system be good enough to be treated as a true just in time requisition and Dynamics not be involved?</p> <p>Is there any other purpose for this exchange other than what has been stated above?</p>	Attachment B - #64	<p>Daily data exchanges are needed in a real-time environment to (1) prevent stock outages; (2) ensure that the inventory level triggers a timely notification that the ROP has been reached; and (3) that the replenishment process generates a purchase order for the ROQ.</p> <p>Microsoft Dynamics GP is not Greenville Water's warehouse system, but rather our financial/accounting system. It is here the stock count calendar and supporting cycle counting processes are maintained.</p> <p>In our current state, requisitions are not being used in the manner in which the questioner assumes. In current state, Requisition is used to transfer material from main inventory site (SHOP) to other sites (Vehicles). It is the Work Order that relieves the inventory.</p>

<p>17. Since purchasing is in MS Dynamics, it is presumed that the master records regarding contracts with suppliers on various commodities/stock code will be maintained in MS Dynamics, and that the reason for the vendor master list synch interface is to associate the commodities with the supplier(s), to enable proper Materials Requisition creation in the EAM system. Usually for supply chain redundancy there will be multiple suppliers for the same product. We commonly receive requests from customers to synchronize contracts to the EAM system, so that the user creating the Material Requisition in the EAM system can have the option of choosing the supplier that is associated with contracts as first preference, and specify the specific contract to use for purchasing. Is this not a requirement at GW?</p>	<p>Attachment B - #65</p>	<p>This assumption is correct, but this is standard for most Item Vendors Maintenance modules.</p> <p>It is not considered redundant—again this is standard in most ERP systems. MS Dynamics GP maintains contract pricing from various sources. If the questioner is familiar with how GP works, then the questioner knows that GP provides the user with some choices/options regarding what supplier to use when generating a purchase order.</p> <p>No changes needed in this area.</p>
<p>18. Please elaborate on this requirement. What information is recorded about those spaces? Their furnishings, and inhabitants?</p>	<p>Attachment B - #76</p>	<p>Desired ability to capture relevant information associated with a capital, inventoried, or tracked item within the spaces. Ex. Copier, Computer, etc. Less so to track furnishings, unless those items are a part of a capital purchase or exceed a certain threshold value. Tracking the inhabitants of a building is less of a concern, unless it is an emergency situation such as fire and you need to know the location of all affected personnel.</p>
<p>19. If the vendor's core CMMS application does not run on any version of Microsoft Windows Server, will this potentially disqualify the vendor's bid? Will GW consider a hosted solution?</p>	<p>Attachment C - #1</p>	<p>No, it will not disqualify the vendor's bid, but Microsoft Windows is preferred.</p> <p>We would prefer a non-hosted solution. There are security and resiliency reasons associated with GW's non-hosted preference.</p>

20. If the vendor's core CMMS application does not operate in a Hyper-V Virtualization environment will this potentially disqualify the vendor's bid?	Attachment C - #6	No, this will not disqualify the vendor's bid. This would be a concern of ours, if it could not be virtualized, however.
21. Does this question relate to an expected core CMMS application function or only for Mobile Application transactions? - Do your current Microsoft Mobile applications operate in disconnected mode? - Can you list the current transactions (e.g., Asset Inspections, etc.) that are sent to your CMMS via your Microsoft Mobile applications?	Attachment C - #40	This is for mobile transactions. We have no current CMMS applications that operate in either disconnected or live mode. MP2 is not operational on the tablets used by maintenance personnel. Some field employees with tablets and laptops currently collect PM and horizontal asset data that is stored in GIS via a live connection.
22. What are the use cases/purpose for integration of their CMMS/EAM with : - Kaizan Vehicle Management - Phoenix Fuel Management System - GE IFIX SCADA Can you provide ops stats to help build some intelligence into the PM scheduling? This info will help us to better understand the scope of integration that is needed and the ability to reuse our existing artifacts to suffice the requirements.		Integrations with these systems is not currently a priority. Potential for future integration is of interest.
23. Integrations: Can GW provide additional details on required integrations? Does the system merely need to demonstrate the capacity to be integrated/interfaced to the ERP and other GW systems?		At a minimum, the CMMS will need to be integrated with the CIS, GIS, LIMS and ERP (Dynamics).
24. Pricing: Of the 76 users of MP2 and Fleet, can GW indicate how many would be: a. Full system users b. Access exclusively via mobile device? c. Service requestors only?		Refer to attached table.
25. Does GW have a stated preference for either an on-premise or cloud deployment?		On-premise is preferred.

<p>26. Can GWS provide a general breakdown and summary of users by role today? Understanding for training of users in their roles, etc. For example:</p> <ul style="list-style-type: none"> a. Management/Leadership (Dir Engineering, Maintenance, Operations) b. Maintenance supervisors, etc c. Planners / Schedulers (possibly blended role with supervisors today?) d. Technicians e. Other 	<p>Refer to attached table.</p>
<p>27. Are all maintenance activities planned and dispatched from central maintenance shop, or are there several locations from which maintenance resources are scheduled and dispatched?</p>	<p>Maintenance activities could originate from several locations (water treatment plants, operations building) and potentially also from the field.</p>
<p>28. Can you describe your current maturity state with ESRI ArcGIS (how many years deployed, % of assets in system, detail of map layers, attributes, etc)?</p>	<p>The GIS program started in Greenville Water in 1995 with the GPS collection of horizontal distribution system assets. Roughly 95% of our horizontal distribution system assets are in GIS. This includes, but not limited to, >13,000 hydrant features, >45,000 water line features and >49,000 valves. Attributes include, but not limited to, install year, ownership, size, open direction, project #, etc.</p>
<p>29. Can you share the business process flows that were defined as part of your Phase I exercise? Were they done independent of any software/technology solutions to help improve processes? Have you mapped out those processes yet with respect to the integrations to MS Dynamics, etc?</p>	<p>The business process diagrams were created independent of software/technology solutions. The Needs Assessment Report will be shared with the selected vendor.</p>
<p>30. What is the timeline and date for vendor and partner selection?</p>	<p>To be determined.</p>
<p>31. Is there a targeted timeline for project implementation and go-live with the new system?</p>	<p>The targeted timeline for project implementation and go-live with the new system will be agreed upon with the selected vendor as a part of the terms of the service agreement.</p>
<p>32. Will the mobile/field users be able to remain “connected” or are their remote locations that will require them to run in a disconnected environment. Please specify the number of users that could require “disconnected” mobile usage.</p>	<p>There are remote locations where users will need to function in a “disconnected” environment and some users will not have connected access by default. The number of disconnected users has been added to the user spreadsheet.</p>
<p>33. Please break down the expected user count of users by role – examples include Asset Manager, Engineer, Project/Construction Manager, Planner/Scheduler, Supervisor, Crews, Technicians, Warehouse Personnel, Warehouse Manager, Buyer, Other?</p>	<p>Refer to attached table.</p>

34. How many users do you expect to be office users and how many mobile?	Refer to attached table.
<p>35. For the Microsoft Dynamics GP Financials interface.</p> <p>a. May we assume the CMMS will own inventory with Dynamics owning vendor relationships, contracts, invoices (accounts payable/receivables)?</p> <p>b. Does Dynamics own employee information such that an interface will be required for personnel and labor information?</p> <p>c. Do you intend for there to be a fixed asset interface between CMMS and Dynamics?</p> <p>d. What database platform and version?</p> <p>e. Any plans to upgrade Dynamics during the CMMS implementation?</p>	<p>a. Yes.</p> <p>b. No, an interface with GP will not be required for personnel and labor information. Look up tables of general labor rates will be desired in the CMMS for costing purposes.</p> <p>c. Yes.</p> <p>d. SQL Server 2014</p> <p>e. Yes</p>
<p>36. For the Advanced Infinity CIS Interface.</p> <p>a. May we assume Field Services does initial response and troubleshooting with O & M maintenance responsibility for meter asset management?</p> <p>b. What database platform and version?</p> <p>c. Any plans to upgrade Infinity during the CMMS implementation?</p>	<p>a. Yes; at the onset meters will not be part of the CMMS inventory</p> <p>b. SQL Server 2014</p> <p>c. Yes</p>
<p>37. For the ArcGIS interface: what version of ArcGIS server is installed today?</p> <p>a. Do you have any plans to upgrade your Esri software in parallel with the CMMS implementation?</p> <p>b. Have you standardized on the local government model? Do you intend to modify the data model during the CMMS implementation?</p> <p>c. Would you be open to modifying the model slightly if doing so will result in a better performing GIS integration?</p> <p>d. Do you currently or plan to utilize ArcGIS Online?</p>	<p>a. Currently we are using ArcGIS Server 10.3. We have plans to upgrade, but this may or may not be in parallel with the CMMS implementation, unless it is required.</p> <p>b. We have not standardized to the local government model and do not plan to modify the data model during the CMMS implementation.</p> <p>c. We would be open to modifying the model slightly if that will result in a better performing GIS integration and it does not have a major negative impact on our system or models.</p> <p>d. We are not currently utilizing ArcGIS Online, although we do have a GW ArcGIS Online site for internal staff only. We have considered the use of ArcGIS Online for data sharing.</p>
38. What data do you intend to share between the LIMS and CMMS system?	Online analyzer maintenance schedules, capital equipment lifecycle analysis and customer water quality information.
39. For the Kaizen Fleet system – do you intend to interface with or replace this system with the CMMS?	The hope would be to replace this system with the CMMS, if possible.

40. Document Management system – will this be implemented in parallel with the CMMS system, once selected, or should that be planned for a later phase?	EDMS will likely follow CMMS/AM.
41. Is it possible to receive Attachment B in an excel format?	Yes. The Procurement Manager has emailed the Excel version.
42. Please clarify what you mean by “drill across” from the CMMS to GP or CIS.	Attachment B - #26 This refers to relational queries of records from separate systems. Ability to access data stored within GP or CIS which is NOT stored in the CMMS, such as consumption history at a service address.
43. Please clarify what outcomes you are expecting from the requirement to provide “Side-by-side visual comparisons of an asset from one inspection to another.”	Attachment B - #56 For condition assessment and lifecycle analysis; it would be useful to have documented, visual side-by-side confirmation of the effects of time and usage on an asset, both in the field and at the manager’s desk.
44. “Vendor performance tracking and rating”: This is typically a function of Dynamics given their ownership of the vendors, vendor relationships, and contracts. Please confirm it is a requirement of the CMMS.	Attachment B - #67 Currently, there are no plans to track vendor performance of contracts in Microsoft Dynamics GP, but could be something discussed in future upgrades.
45. Please clarify the requirement of what updates you wish the CMMS to make to Outlook.	Attachment B - #79 We would like shared Outlook calendars to sync with personal calendars for notifications of maintenance tasks. The Director of IT indicated that there are a variety of ways to accomplish these notifications: use of the Export function, simply send a task via email, make use of shared calendars.
46. How many users are you expecting in total: a. Mobile users who perform work: b. Supervisors who review and assign work: c. Planners who plan and schedule work and also maintenance schedules? d. Inventory Managers? e. Warehouse Clerks? f. Asset Managers?	Refer to attached table.

QUESTIONS ASKED DURING PRE-BID MEETING

Dan (GrayMatter Systems) – Upgrades on CMMS MP Joe – two upgrades, last one 5 years ago. Use has been focused on scheduled PM.

Aaron Cromer (GrayMatter Systems) - Does GW expect that Vertical and Horizontal assets will reside in the same system? Rebecca – looking for a comprehensive solution; reduced integration between systems is the goal. Joe: Best of breed is what we’re hoping for.

Corey Welsh (NEXGEN) – Does GW use software for lifecycle and long-range planning? Joe – No, current state is MS Excel.

Craig Sanders (ABB) – Is a mobile solution needed for this project? Yes How many mobile users? **Number of disconnected users have been added to the user spreadsheet.**

Craig Sanders (ABB) – Further elaborate on #21: Collect data in the field and synch back up when they arrive back on site. Work flow processes are the same in the disconnected mode (with the exception of synching up). GW shared that all work flow processes are mapped according to how work currently flows. GW also shared that we have also visioned where we would like to go, thus completing the gap analysis.

Jerry Kueny (Infor) – Is GW looking for a truly mobile connection? Joe – prefer Window-based mobile application on GW side of the fire wall. Real time is not required and at this time GW emphasizes that we do not foresee a need for all mobile users to be “real time”.

Michelle Kelly (Advoco) – What is the integration database structure? Joe - Sequel Server for all relevant systems described in #2.

Nestor Vinas (Starboard Consulting) – Should pricing be inclusive of all expenses versus what is actually expended? Yes
Purchasing Manager will send all attachments which must be submitted in editable format.

Michelle Kelly (Advoco) – Must resumes be in the format of Attachment D? Yes

Dan (GrayMatter Systems) – Is there a schedule deadline? No – the schedule will be agreed upon jointly by the vendor and GW.

Corey Welsh (NEXGEN) – Does GW outsource any of your maintenance and labor to contractors? Rebecca – Yes, determined based upon special skill set (such as some electrical services). Contractors are used also when there are time restrictions. Access to CMMS by contractors? Rebecca – not envisioned at this time. GW staff would be responsible for quality control of the data and entering the data into the system.

Nestor Vinas (Starboard Consulting) – How large is GW’s fleet? 200 vehicles that use gas or diesel (other equipment not included). Is vehicle maintenance outsourced? Valerie – some vehicle maintenance is outsourced due to warranty or special services required.

Dan (GrayMatter Systems) – How many “rotating assets” (pumps, etc.)? 1200 valve actuators, motors, pumps, mixers, HVAC, gearboxes, etc.

Dan (GrayMatter Systems) – What is the proposed launch date? 4th Quarter 2017
