

City of Merced



City of Merced
"Gateway to Yosemite"

Needs Assessment and IT Plan Update

November 23, 2005



November 23, 2005

City of Merced
Attn: Jeff Lewis
Director of Information Systems
678 W. 18th St.
Merced, CA 95340

Dear Jeff:

PTI is pleased to present this final version of Merced's *Needs Assessment and IT Plan Update*. The plan documents the findings, market research, and recommendations resulting from PTI's recent work at the City.

I would like to take this opportunity to thank you and the project's steering team for your work on this project. The City of Merced's collective interest, participation, feedback, and effort drove the creation of this assessment and the resulting recommendations.

Please call me at (425) 881-3991 if you have any questions.

Thanks and best wishes,

Dan Borgen, Co-Chief Executive Officer
Pacific Technologies, Inc.

Table of Contents

City of Merced

I. Executive Summary	1-1
II. Findings	2-1
III. Market Research	3-1
IV. Recommendations	4-1
V. IT Plan Update	5-1
VI. Appendix	
• Functional Requirements	A-1

EXECUTIVE SUMMARY

INTRODUCTION

In July of 2005, the City of Merced (the City) engaged Pacific Technologies, Inc. (PTI) to:

- ◆ Evaluate automation options for the City's permit management / code enforcement and maintenance management business functions, and recommend an appropriate direction
- ◆ Help the City update its 2003 Strategic Information Systems Plan (SISP) by revisiting and revising strategic IT project priorities

PTI supported the effort through interviews, focus groups, and workshops involving over 40 stakeholders. We also conducted market research, including discussions with the City's incumbent vendor (HTE). Additionally, our consultants distributed a detailed requirements worksheet, which allowed City staff to prioritize perceived functional needs.

We validated our permit management / code enforcement and maintenance management recommendations with the City's Technology Committee. PTI also worked with that group to revise the City's IT project priorities.

Overall, this work provides the City specific recommendations intended to help meet permit management / code enforcement and maintenance management needs. It also establishes an agreed-upon direction for major IT investments over the next several years – helping ensure that the City is still on-track toward the IT goal state defined in the 2003 IT plan.

Our recommendations are aligned with a key strategic imperative from the 2003 IT plan, which

directs the City look first to HTE for automated solutions, though not to the exclusion of critical business functionality. In addition, to some degree this work represents an addendum to the original strategic plan. As such, it reflects a “snapshot” in time regarding the City's current IT position. *Accordingly, the updated IT project plan should continue to be treated as a living document, reviewed annually, and revised as necessary.*

The remainder of this chapter summarizes the results of the planning work, as follows:

- A. Summary Permit Management / Code Enforcement and Maintenance Management Findings
- B. Summary Permit Management / Code Enforcement and Maintenance Management Recommendations
- C. IT Plan Update
- D. Conclusion

The body of the report provides additional detail, while Appendix A documents the prioritized functional requirements.

A. SUMMARY PERMIT MANAGEMENT / CODE ENFORCEMENT AND MAINTENANCE MANAGEMENT FINDINGS

PTI identified the following major findings regarding this study's two areas of application software focus: permit management/code enforcement and maintenance management.

Permit Management / Code Enforcement

- ◆ **The City already owns HTE licenses for permit management and code enforcement**
- ◆ **Contrary to best practices, the City is using HTE for permitting and a separate package for code enforcement**
- ◆ **Many staff members are resistant to further use of HTE**
- ◆ **Preliminary research indicates that HTE could meet the City's permit management / code enforcement business needs – see Appendix A for more detailed functional requirements**

Maintenance Management

- ◆ **The City also already owns HTE licenses for maintenance management**
- ◆ **It is unusual for a City of Merced's size not to have a comprehensive automated solution for maintenance management (i.e., preventative maintenance and asset management functions are largely unautomated at the City)**

- ◆ **Similar to permit management and code enforcement, many staff are resistant to using HTE**
- ◆ **Unlike permit management and code enforcement, HTE currently has no viable field automation solution for maintenance management; this was identified as an important business need – see Appendix A for detailed functional requirements**

B. SUMMARY PERMIT MANAGEMENT / CODE ENFORCEMENT AND MAINTENANCE MANAGEMENT RECOMMENDATIONS

PTI conducted market research to evaluate automation options for the City. We included both HTE and “best-of-breed” products in our analysis. Informed by this evaluation – as well as over a decade of experience in municipal technology planning – PTI developed preliminary recommendations and validated our analysis with the project's steering team.

PTI's primary recommendations indicate that:

- ◆ **Merced should utilize HTE unless the software cannot address critical business requirements**
- ◆ **To make this determination, the City should:**
 - **Charter evaluation teams to develop targeted demonstration scripts for HTE**
 - **Allow HTE to demonstrate the product's ability to perform the scripts**

- **Score the demonstrations and have the Technology Committee make a decision, based on recommendations developed by the evaluation teams**

- ◆ **If HTE meets critical requirements, ensure that sufficient time and funding are directed toward training and process engineering**
- ◆ **If HTE cannot meet critical requirements, the City should conduct a formal procurement process**

PTI believes that this recommendation represents the best course of action for the City because it:

- ◆ Is aligned with Merced's Strategic IT Plan
- ◆ Will not force the City through an expensive and time-consuming procurement process unless absolutely necessary
- ◆ Relies on scripted demonstrations to ensure an informed decision
- ◆ Allows procurement of a best-of-breed solution, if required

In both business areas (i.e., permit management / code enforcement and maintenance management) market research indicates that HTE offers the most cost-effective solution, given that the City already owns the necessary software licenses.

C. IT PLAN UPDATE

Through a series of interviews and a workshop with the Technology Committee, PTI facilitated an update of the 2003 Strategic IT Plan project list and timelines. The City has made significant progress on the original plan, completing over one-third of the recommended

projects. As one would expect, however, several additional projects surfaced since delivery of the 2003 plan. Some original projects have been delayed while new business needs were addressed.

PTI worked with the Technology Committee to reschedule the remaining projects from the 2003 plan. The Committee also added the following initiatives to the list:

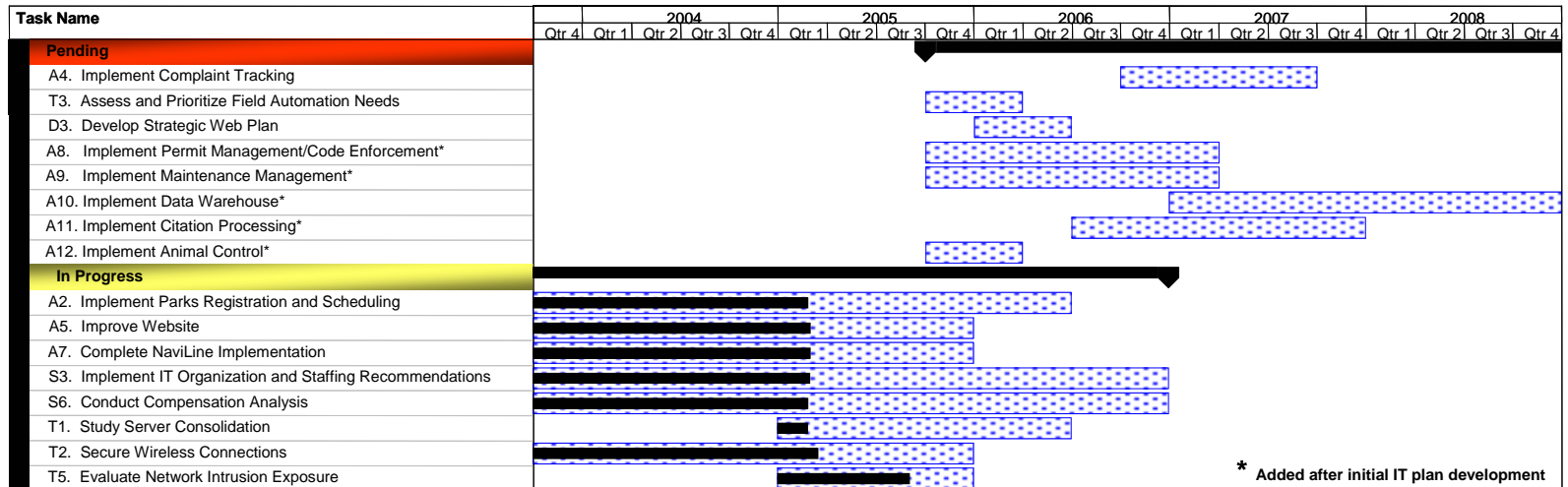
- ◆ Implement Permit Management / Code Enforcement
- ◆ Implement Maintenance Management
- ◆ Implement Data Warehouse
- ◆ Implement Citation Processing
- ◆ Implement Animal Control

The next page presents the revised project schedule.

REVISED IT PLAN PROJECT SCHEDULE

NEEDS ASSESSMENT AND IT PLAN UPDATE

Chapter 1:
 Executive Summary



The City will need to review and make adjustments to the project timeline over the planning horizon based on resource constraints and changing business needs.

D. CONCLUSION

The City of Merced has made significant progress on implementing its 2003 Strategic IT Plan. And, as evidenced by this recent assessment, the City is clearly committed to moving forward toward its defined IT goals by keeping the plan current – and relevant to emerging business needs.

Key next steps include:

- ◆ **Effective communication with City management and staff regarding the contents of this briefing**
- ◆ **Chartering the evaluation teams for permit management / code enforcement and maintenance management automation**
- ◆ **Developing and executing an action plan for product selection, informed by PTI's recommendations**

FINDINGS

Findings:

Permit Management / Code Enforcement

CHAPTER

2

The following presents our findings regarding permit management and code enforcement needs.

- ◆ **The City owns and has installed HTE code enforcement/building permit modules – with implementation of the most current release targeted for October**
- ◆ **Staff utilize HTE building permit functionality – but not code enforcement**
- ◆ **Currently, CityCode is used to support code enforcement – this product is not interfaced with HTE**
- ◆ **In PTI's experience, it is unusual to employ separate packages to support permit management and code enforcement functionality, as the two are closely related**
- ◆ **Several issues surround the current HTE implementation:**
 - Pervasive lack of training and product understanding
 - Many users find HTE difficult to use:
 - Repetitive data entry
 - Cumbersome reporting
 - Staff perceive lack of necessary access rights
 - No field automation
 - Lacks GIS integration
- ◆ **Perhaps as a result of the above, many staff appear resistant to wider HTE deployment**
- ◆ **Initial research suggests that the HTE product appears capable of meeting the City's major functional requirements**
- ◆ **Initial research also indicates that HTE will be significantly less expensive than implementing a best-of-breed solution**

Findings:

Maintenance Management

CHAPTER

2

The following presents our findings regarding maintenance management needs.

- ◆ **Currently, preventative maintenance/asset management is largely unautomated – this is unusual for a City of Merced’s size**
- ◆ **Management would like to implement activity-based costing, which is not possible with current tools**
- ◆ **While the City owns and has installed HTE’s work order/facilities management module, it is used in a very limited fashion**
- ◆ **Staff utilize a custom-developed Access package to support work order needs – while useful, it is not intended to serve as a fully functional maintenance management system**
- ◆ **In addition, the City owns Op 10 – a work order package – which is also not being used**
- ◆ **Staff also employ HTE’s fleet management modules**
- ◆ **The City uses the @Road product for vehicle tracking and text messaging, supporting basic field automation**
- ◆ **In summary, several issues surround maintenance management at the City:**
 - No comprehensive integrated solution exists
 - Correspondingly, current processes are very paper-intensive
 - Many staff appear very resistant to further utilization of HTE in this area
- ◆ **Initial research indicates that HTE does not offer field automation for maintenance management – an important business need**
- ◆ **Initial research suggests that implementing HTE will be significantly less expensive than implementing a best-of-breed solution**

MARKET RESEARCH

Market Research: Overview

PTI conducted market research to evaluate and cost options for the City:

For Permit Management / Code Enforcement, we contacted:

- HTE
- Accela
- Hansen

Regarding Maintenance Management, we contacted:

- HTE
- Hansen

The following page summarizes the results of our work. As the table indicates, HTE easily will be an order of magnitude less expensive than any other option.

Market Research Results Summary

The following matrix presents market research cost estimates. Note that costs do not include estimated hardware (e.g., laptops, PDAs, etc.) or wireless networking expenditures.

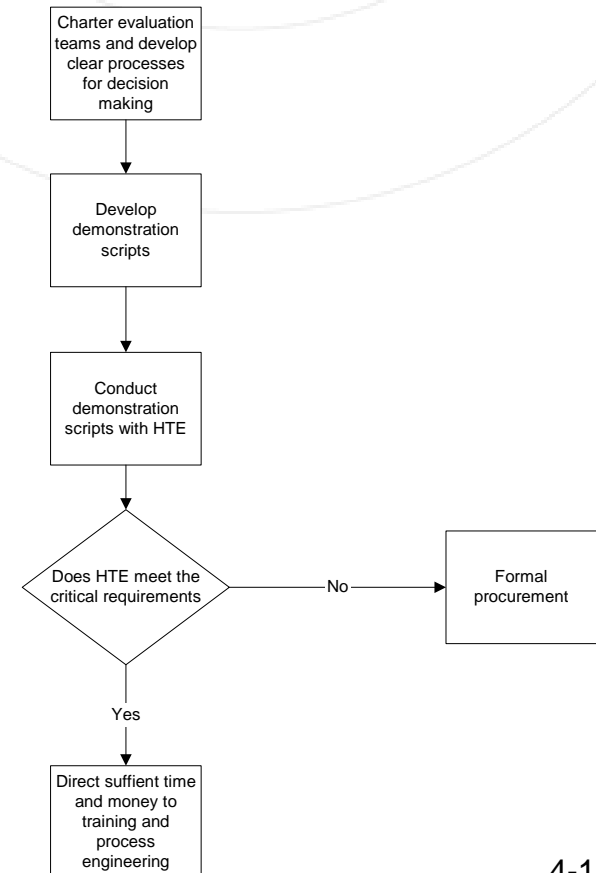
Permit Management / Code Enforcement			
Vendor	One-Time Cost	Recurring Cost	Comments
HTE	\$20k - \$30k for training services; \$13k for wireless licenses; \$1.8k for wireless installation	~\$6k + \$2.6k for field automation	One-time cost reflects training and assistance with business process re-engineering.
Accela	\$250k - \$500k for implementation services; \$80k for 20 licenses, including field automation	\$16k (20% of license costs)	Implementation costs depend on City staff involvement.
Hansen	\$150k - \$300k for implementation services; \$150k for 20 licenses, including field automation	\$30k (20% of license costs)	Implementation costs depend on City staff involvement.
Maintenance Management			
Vendor	One-Time Cost	Recurring Cost	Comments
HTE	\$20k - \$30k (does not include field automation)	~6k	One-time cost reflects training and assistance with business process re-engineering. HTE does not have a field automation solution for maintenance management at this time.
Hansen	\$250k - \$400k for implementation services; \$295k for 40 licenses, including field automation	\$59k (20% of license costs)	Implementation costs depend on City staff involvement.

RECOMMENDATIONS

Recommendations

The following presents PTI's recommendations for the City of Merced.

- ◆ **Utilize HTE unless it cannot meet critical business requirements**
- ◆ **Use the following process to make this determination:**
 - Technology Committee establishes evaluation teams and approves decision-making criteria
 - Evaluation teams develop small sets of targeted demonstration scripts
 - HTE demonstrates the product using the scripts
 - Technology Committee, evaluation teams, and interested users score the demos
 - Evaluation teams develop recommendations; Technology Committee makes final decision
- ◆ **If HTE meets critical requirements, ensure that sufficient time and funding are directed to training and process engineering**
- ◆ **If HTE appears unable to meet critical requirements, conduct a formal procurement process, which should include both HTE and best-of-breed responses**



IT PLAN UPDATE

IT Plan Update: Overview

CHAPTER

5

In 2003, PTI worked with the City to develop an IT Strategic Plan. That engagement included a set of recommended projects and an associated timeline for completing the work. While the City has been making steady progress on these activities, some schedule delays and changing needs have prompted the City to revisit the project list and revise it accordingly.

The remainder of this chapter presents:

- The original project plan
- IT progress summary, including projects added since the original work
- A revised project plan that re-schedules existing projects and incorporates new efforts

IT Plan Update: Original Timeline

CHAPTER 5

The following Gantt chart was approved for the 2003 Strategic Information Systems Plan.

Task Name	Start	Finish	2002				2003				2004				2005			
			Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4
Application Projects	1/1/2003	6/30/2006	[Gantt bars for Application Projects]															
A1. Implement Help Desk	7/1/2003	9/30/2003	[Gantt bar]															
A2. Implement Parks Registration and Scheduling	7/1/2003	6/29/2004	[Gantt bar]															
A3. Evaluate and Implement Records/Document Management	7/3/2003	6/30/2006	[Gantt bar]															
A4. Implement Complaint Tracking	4/1/2005	12/30/2005	[Gantt bar]															
A5. Improve Website	1/1/2003	12/31/2003	[Gantt bar]															
A6. Implement Automated Mapping (GIS)	7/1/2003	3/31/2005	[Gantt bar]															
A7. Complete Naviline Implementation	1/1/2003	12/31/2003	[Gantt bar]															
Service Delivery Projects	1/1/2003	6/30/2006	[Gantt bars for Service Delivery Projects]															
S1. Hire GIS Coordinator	1/1/2003	9/30/2003	[Gantt bar]															
S2. Hire IS Director	1/1/2003	9/30/2003	[Gantt bar]															
S3. Implement IT Organization and Staffing Recommendations	10/1/2003	6/30/2004	[Gantt bar]															
S4. Institute Policies and Procedures	10/1/2003	3/31/2004	[Gantt bar]															
S5. Setup Help Desk Operations	10/1/2003	3/29/2004	[Gantt bar]															
S6. Conduct Compensation Analysis	1/1/2003	3/31/2003	[Gantt bar]															
S7. Develop and Implement IT Training Plan	10/1/2003	6/30/2006	[Gantt bar]															
Technology Infrastructure Projects	1/1/2003	12/30/2005	[Gantt bars for Technology Infrastructure Projects]															
T1. Study Server Consolidation	10/3/2005	12/30/2005	[Gantt bar]															
T2. Secure Wireless Connections	1/1/2003	3/31/2003	[Gantt bar]															
T3. Assess and Prioritize Field Automation Needs	10/1/2003	12/31/2003	[Gantt bar]															
T4. Analyze and Update HTE Security Access Rights	1/1/2003	4/2/2003	[Gantt bar]															
T5. Evaluate Network Intrusion Exposure	7/1/2004	12/28/2004	[Gantt bar]															
Decision Making Projects	1/1/2003	9/29/2004	[Gantt bars for Decision Making Projects]															
D1. Develop and Institute Selection and Implementation Methodology	10/1/2003	3/29/2004	[Gantt bar]															
D2. Implement Decision Making Recommendations	1/1/2003	9/30/2003	[Gantt bar]															
D3. Develop Strategic Web Plan	1/1/2004	9/29/2004	[Gantt bar]															

IT Plan Update:

Project Progress

As this page reflects, the City has made significant progress on its strategic IT plan.

Completed

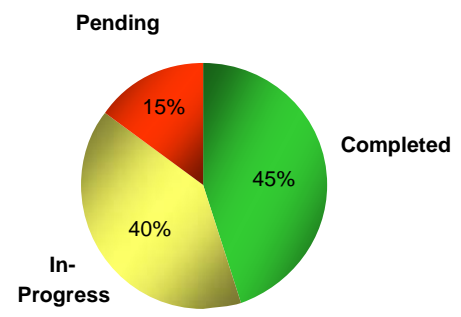
- ◆ A1. Implement Help Desk
- ◆ A3. Evaluate and Implement Records/Document Management
- ◆ S1. Hire GIS Coordinator
- ◆ S2. Hire IS Director
- ◆ S5. Set up Help Desk Operations
- ◆ S7. Develop and Implement IT Training Plan
- ◆ T4. Analyze and Update HTE Security Access Rights
- ◆ D1. Develop and Institute Selection and Implementation Methodology
- ◆ D2. Implement Decision-Making Recommendations

In-Progress

- ◆ A2. Implement Parks Registration and Scheduling
- ◆ A5. Improve Website
- ◆ A7. Complete NaviLine Implementation
- ◆ S3. Implement IT Organization and Staffing Recommendation
- ◆ S6. Conduct Compensation Analysis
- ◆ T1. Study Server Consolidation
- ◆ T2. Secure Wireless Connections
- ◆ T5. Evaluate Network Intrusion Exposure

Pending

- ◆ A4. Implement Complaint Tracking
- ◆ T3. Assess and Prioritize Field Automation Needs
- ◆ D3. Develop a Strategic Web Plan



IT Plan Update: Overview

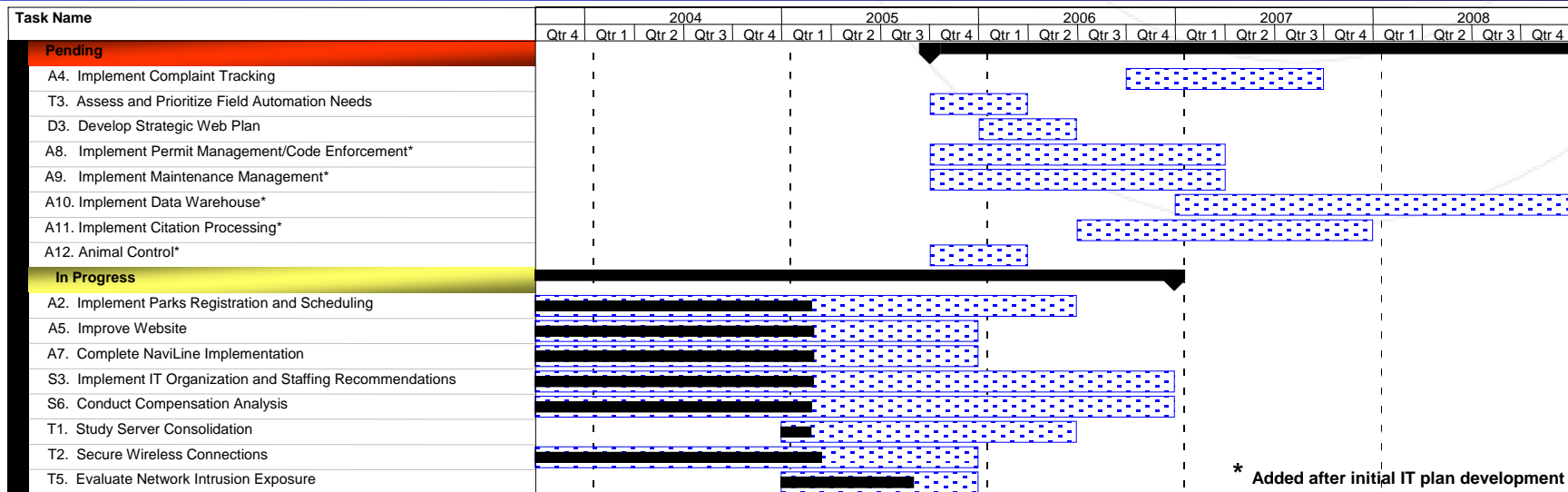
PTI worked with the Technology Committee to update the project plan. The committee agreed that all pending and in-progress projects were worthwhile and should be included in the new schedule. In addition, the following projects were added to the list:

- A8. Implement Permit Management/Code Enforcement
- A9. Implement Maintenance Management
- A10. Implement Data Warehouse
- A11. Implement Citation Processing
- A12. Implement Animal Control

PTI worked with the Committee to arrive at the schedule presented on the following page.

IT Plan Update: Revised Project Schedule

The following Gantt chart incorporates agreed-upon revisions from the IT Plan Update workshop.



The City will need to review and make adjustments to the project timeline over the planning horizon based on resource constraints and changing business needs.

Notes:

Project A9 – “Implement Maintenance Management” is a predecessor to project A4 – “Implement Complaint Tracking.” Rather than utilize Civica software for Customer Relationship Management (CRM), PTI recommends selecting a work-order platform first (as part of the maintenance management effort). The new CRM system can then effectively serve as a front-end, streamlining the City’s response to citizen concerns.

Project A10 – “Implement Data Warehouse” will require additional resources, utilizing a contractor to help scope the project, clarify requirements and costs, develop specifications, and implement the warehouse.

FUNCTIONAL REQUIREMENTS

Functional Requirements

As part of this engagement, PTI provided a detailed set of candidate permit management / code enforcement and maintenance management requires to the City. City staff reviewed these requirements and assigned each one an importance rating, using a 1-5 scale where:

- “1” represents optional capabilities
- “3” represents desirable capabilities
- “5” represents mandatory functionality

The following pages present the results of this effort. Note that these requirements should inform development of the demonstration scripts. The scripts will be used to determine whether HTE will adequately meet the City’s needs.

TABLE OF CONTENTS

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

 City of Merced

Functional Requirements.....2
 General System Requirements2
 Permit Management3
 Permit Processing3
 Technical Review and Revision.....3
 Project Management4
 Public Notices and Appeals.....4
 Complaint Processing / Code Enforcement.....4
 Inspections5
 Fees and Billing.....6
 Project Clock6
 Workflow and Document Management.....6
 Scheduling.....7
 Annual Licensing / Maintenance.....8
 Cash Receiving System8
 GIS8
 Addressing8
 Reporting.....9
 Internet9
 Hazardous Materials.....10
 Interface Requirements10
 Maintenance Management11
 Work Order.....11
 Work Scheduling13
 Preventative Maintenance14
 Project Management15
 Asset Management.....16
 Interface Requirements19
 Inventory Management.....20
 Issues22
 Receipts23
 Queries and Reports23
 Events Management.....25
 Miscellaneous.....25

FUNCTIONAL REQUIREMENTS

The following presents functional requirements for permit management/code enforcement and maintenance management software. For each requirement we have also included input from City representatives regarding criticality, utilizing a scale of “1” (optional) to “5” (mandatory). In some instances, stakeholder input differs. A double-underline reflects stakeholder concurrence on criticality, while a single underline reflects conflicting input.

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

GENERAL SYSTEM REQUIREMENTS							
A	1.	User-friendly interface and reporting	1	2	3	4	<u>5</u>
A	2.	Flexible – able to tailor without modifying code	1	2	3	4	<u>5</u>
A	3.	Ability to upload/download information from the field	1	2	3	4	<u>5</u>
A	4.	Provides workflow and intelligent reporting	1	2	3	<u>4</u>	<u>5</u>
A	5.	Supports role-based security	1	2	3	<u>4</u>	5
A	6.	Imports photographs/maps	1	2	3	<u>4</u>	5
A	7.	Able to access information by address, county tax number (parcel number), tracking number, company name, inspection agency, property owner name, multiple person names, subdivision, address range, and geographical region.	1	2	3	4	<u>5</u>
A	8.	Able to support partial key searches.	1	2	3	4	5
A	9.	Able to support Soundex searches.	1	2	3	4	<u>5</u>
A	10.	Able to attach notes (e.g. to conditions, work orders, etc.).	1	2	3	<u>4</u>	5
A	11.	Notes and conditions fields allow unlimited amount of text.	1	2	<u>3</u>	<u>4</u>	5

PERMIT MANAGEMENT/CODE ENFORCEMENT

PERMIT PROCESSING			
B	1.	Able to categorize all tracked activities by type.	1 2 3 <u>4</u> 5
B	2.	Able to automatically number permits in a predefined format.	1 2 3 4 <u>5</u>
B	3.	Able to monitor project/parcel/property lifecycle (including parent/child relationships)	1 2 3 4 <u>5</u>
B	4.	Able to clone existing projects for purposes of use on similar projects.	1 2 <u>3</u> 4 5
B	5.	Able to automatically pull contact demographics/info from centralized database.	1 2 3 <u>4</u> 5
B	6.	End users able to easily add tracking types (e.g., case types, permit types, inspection types).	1 2 3 <u>4</u> 5
B	7.	Able to track and monitor non-permit related activities (e.g., Interpretations, Legal Building Site Letter, Development Letters, Exemption, etc).	1 2 <u>3</u> 4 5
B	8.	Automatically notifies users of conditions or enforcement activities that are placed on a property, permit, address, parcel, or building.	1 2 3 4 <u>5</u>
B	9.	Able to perform global project holds.	1 2 3 <u>4</u> 5
B	10.	Able to flexibly associate various data fields with permits, addresses or contractors (e.g., correction notice with a permit, a condition with a property, a complaint with a contractor).	1 2 3 4 <u>5</u>

TECHNICAL REVIEW AND REVISION			
C	1.	Able to track all activities (including review cycles) in the project process including date of action and person involved.	1 2 3 <u>4</u> <u>5</u>
C	2.	Able to automatically generate applicant data (contact info, etc.) if applicant already exists in system.	1 2 3 4 <u>5</u>
C	3.	Able to automatically assign tasks to individuals by project type.	1 2 3 <u>4</u> <u>5</u>
C	4.	Able to automatically assign tasks to work units by project type.	1 2 3 <u>4</u> 5
C	5.	Able to allow revision of tasks, assignments and target completion dates throughout the life of a project.	1 2 3 <u>4</u> <u>5</u>
C	6.	Able to automatically assign individual to review tasks with target completion date.	1 2 3 4 <u>5</u>
C	7.	Able to manually assign individual to review tasks with target completion date.	1 2 3 4 <u>5</u>
C	8.	Able to display active projects at a given review location.	1 2 3 4 <u>5</u>

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

PROJECT MANAGEMENT			
D	1.	Able to automatically flag overdue tasks.	1 2 3 <u>4</u> <u>5</u>
D	2.	Able to forecast target completion dates based on current workload/queue.	1 2 <u>3</u> 4 <u>5</u>
D	3.	Able to automatically batch update or report target completion dates on a weekly basis.	1 2 3 <u>4</u> <u>5</u>
D	4.	Able to track a series of dates and actions by project, contractor or employee, for purposes of an online audit trail.	1 2 3 4 <u>5</u>
D	5.	Provides ticklers for major compliance milestone dates.	1 2 3 4 <u>5</u>
D	6.	Able to display all active projects assigned to a given inspector or reviewer.	1 2 3 4 <u>5</u>
D	7.	Able to easily identify the status of a project and status of assigned tasks.	1 2 3 4 <u>5</u>
D	8.	Able to identify who overrode/revised tasks, assignments, and target completion dates.	1 2 3 4 <u>5</u>
D	9.	Project manager able to apply workload balancing to task assignments based on City-defined criteria (e.g., geography, employee classification, etc.)	1 2 3 4 <u>5</u>

PUBLIC NOTICES AND APPEALS			
E	1.	Able to automatically initiate or prompt a public notice process based on certain conditions.	1 2 3 <u>4</u> <u>5</u>
E	2.	Able to maintain a mailing list for public notices.	1 2 <u>3</u> 4 <u>5</u>
E	3.	Able to generate notification letters.	1 2 <u>3</u> 4 <u>5</u>
E	4.	Able to automatically identify recipients of notification, produce letters, and generate mailing labels (e.g., based on owners of property within 300 ft radius).	1 2 3 <u>4</u> <u>5</u>

COMPLAINT PROCESSING / CODE ENFORCEMENT			
F	1.	Able to manage contacts on address prior to establishment of a case and/or project.	1 2 <u>3</u> <u>4</u> 5
F	2.	Able to link codes.	1 2 3 <u>4</u> 5
F	3.	Code able to be kept in a text-base and support text-search of code.	1 2 3 4 <u>5</u>
F	4.	Able to perform word-processing-style text manipulation, including cutting and pasting of text	1 2 3 4 <u>5</u>
F	5.	Able to cross-reference similar cases.	1 2 3 4 <u>5</u>
F	6.	Provides a notes log.	1 2 3 4 <u>5</u>
F	7.	Provides a notes log that is author- and date-stamped.	1 2 3 4 <u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

COMPLAINT PROCESSING / CODE ENFORCEMENT							
F	8.	Provides a field that notifies user of “issues with adjacent properties.”	1	2	3	4	<u>5</u>
F	9.	See all case history on a given property.	1	2	3	<u>4</u>	5

INSPECTIONS							
G	1.	Able to track inspections.	1	2	3	4	<u>5</u>
G	2.	Able to track inspections life cycle information, including inspection type, dates of each activity, time inspector arrived for each activity, inspection status (e.g., approval, denial, final), comments, inspector mileage, and time spent.	1	2	3	4	<u>5</u>
G	3.	Able to collect inspection requests via manual entry.	1	2	3	4	<u>5</u>
G	4.	Able to collect inspection requests via Interactive Voice Response (IVR).	1	2	3	4	<u>5</u>
G	5.	Able to collect inspection requests via the Internet.	1	2	3	4	<u>5</u>
G	6.	Able to timestamp inspection requests.	1	2	3	4	<u>5</u>
G	7.	Able to automatically distribute inspection requests to inspectors based on geographic area and discipline.	1	2	3	4	<u>5</u>
G	8.	Able to override assignment of inspection requests.	1	2	3	4	<u>5</u>
G	9.	Able to calculate physical inspection routes.	1	2	3	4	<u>5</u>
G	10.	Able to automatically validate inspection requests against permit status (e.g., permit has expired or is on hold).	1	2	3	4	<u>5</u>
G	11.	Able to automatically notify customers that their request has been denied because the permit has expired or is on hold.	1	2	3	4	<u>5</u>
G	12.	Able to track/manage recurring inspections.	1	2	3	4	<u>5</u>
G	13.	Able to schedule recurring inspections (by both staff <i>and</i> external agencies) at a user defined frequency (e.g., annual, biennial, every 6 months, etc).	1	2	3	4	<u>5</u>
G	14.	Field able to <i>download</i> permit or inspection data via laptop or personal communications device. (Indicate which communications devices you support.)	1	2	3	4	<u>5</u>
G	15.	Field able to <i>upload</i> permit or inspection data via laptop or personal communications device. (Indicate which communications devices you support.)	1	2	3	4	<u>5</u>
G	16.	Field able to access <i>read-only</i> to <i>entire system</i> via laptop and wireless network.	1	2	3	4	<u>5</u>
G	17.	Field able to access <i>write</i> to <i>entire system</i> via laptop and wireless network.	1	2	3	4	<u>5</u>
G	18.	Able to track “Pre-Fire” inspections	1	2	3	4	<u>5</u>

FEES AND BILLING			
H	1.	Able to calculate fees by hours, project value, square footage and acreage, total all fees within a single permit.	1 2 3 <u>4</u> <u>5</u>
H	2.	Able to retain historical fee calculation methods after changes in calculation methods.	1 2 3 <u>4</u> <u>5</u>
H	3.	Able to retain historical fee calculations after changes in calculation methods.	1 2 3 <u>4</u> <u>5</u>
H	4.	Able to support variable-rate calculation for different types of permits (i.e., hourly rates for different types of master review projected).	1 2 3 <u>4</u> <u>5</u>
H	5.	Able to identify properties with liens.	1 2 <u>3</u> <u>4</u> 5
H	6.	Able to support table-driven fee schedules.	1 2 3 <u>4</u> 5
H	7.	Able to support permit-specific advanced deposits.	1 2 3 <u>4</u> 5
H	8.	Able to support contractor-specific advanced deposits.	1 2 3 <u>4</u> 5
H	9.	Able to debit charges against fee deposits.	1 2 3 <u>4</u> 5
H	10.	Able to display which fee components received payments from a deposit and which <i>portions</i> of those components received payments from a deposit.	1 2 <u>3</u> <u>4</u> 5
H	11.	Able to estimate building valuation of the project with City-specified calculation rules.	1 2 3 <u>4</u> <u>5</u>
H	12.	Able to base inspection fees by the agency or person making the inspection.	1 2 3 <u>4</u> 5

PROJECT CLOCK			
I	1.	Able to comply with time tracking requirements.	1 2 3 <u>4</u> <u>5</u>
I	2.	Supports the creation of Merced-specific timelines (e.g., violation penalty dates, project review turn-around times) without programmer intervention.	1 2 3 <u>4</u> <u>5</u>

WORKFLOW AND DOCUMENT MANAGEMENT			
J	1.	Able to track comments/redlines on multiple color coded layers, and be able to identify who is associated with each layer.	1 2 3 <u>4</u> <u>5</u>
J	2.	Able to display daily work queues of various staff members (e.g., inspectors, reviewers, etc.) on screen.	1 2 3 <u>4</u> <u>5</u>
J	3.	User able to select a specific task in a work queue display and view detailed information (i.e., to “drill down” from a work queue view to a detailed task view).	1 2 3 <u>4</u> 5
J	4.	Able to automatically route work (i.e., plans, applications and complaints) through an organization and set of processes.	1 2 3 <u>4</u> <u>5</u>
J	5.	Able to validate that tasks/processes were completed correctly before advancing work items to the next process.	1 2 3 4 <u>5</u>
J	6.	Able to perform parallel routing of work and track it accordingly.	1 2 3 4 <u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

WORKFLOW AND DOCUMENT MANAGEMENT			
J	7.	Able to perform parallel and serial routing of work in combination.	1 2 3 4 <u>5</u>
J	8.	Able to route to individuals or groups.	1 2 3 4 <u>5</u>
J	9.	Able to associate timeframes to tasks according to specified criteria.	1 2 3 4 <u>5</u>
J	10.	Able to send rejected items back to previous step in work process, with comments.	1 2 3 <u>4</u> <u>5</u>
J	11.	Able to perform ad-hoc changes to workflows, without programmer intervention.	1 2 3 <u>4</u> <u>5</u>
J	12.	Able to flexibly change workflow by permit type, without programmer intervention.	1 2 3 <u>4</u> <u>5</u>
J	13.	Able to change workflow by individual permit, without programmer intervention.	1 2 3 <u>4</u> <u>5</u>
J	14.	Able to associate an external document (e.g., Word documents, Excel spreadsheets, AutoCAD files, images) with a project.	1 2 3 4 <u>5</u>
J	15.	Able to store documents and images in folders, and various file formats (e.g., AutoCAD, Excel, etc.)	1 2 3 4 <u>5</u>
J	16.	Able to view AutoCAD, TIFF, GIF, PDF and Microsoft Office formats through your application.	1 2 3 4 <u>5</u>
J	17.	Able to divide document folders into subfolders, based on City's specified organizational scheme.	1 2 3 4 <u>5</u>
J	18.	Able to view redlining and "sticky notes" on plans through the system.	1 2 3 4 <u>5</u>
J	19.	Able to store keywords with documents.	1 2 3 4 <u>5</u>
J	20.	Able to perform barcode tracking and checkout of plans.	1 2 3 <u>4</u> <u>5</u>
J	21.	Able to perform electronic signatures.	1 2 3 <u>4</u> <u>5</u>
J	22.	Able to track revisions and display previous versions of documents.	1 2 3 4 <u>5</u>

SCHEDULING			
K	1.	Able to automatically schedule tasks for various staff members, including intake staff, inspectors, reviewers and review groups.	1 2 3 4 <u>5</u>
K	2.	Automatic scheduling feature is intelligent, (e.g., is capable of factoring in scheduling conflicts, vacations, etc.)	1 2 3 4 <u>5</u>
K	3.	Automatic scheduling feature able to be overridden.	1 2 3 4 <u>5</u>
K	4.	Scheduling feature able to interface with Microsoft Exchange scheduling application.	1 2 3 4 <u>5</u>
K	5.	Able to schedule non-Merced staff (e.g., contractors) for any task.	1 2 3 4 <u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

ANNUAL LICENSING / MAINTENANCE			
L	1.	Able to track/manage a variety of personal and commercial licenses and associated A/R, issuance and reporting.	1 2 <u>3</u> 4 <u>5</u>
L	2.	Able to produce a variety of license examinations (written or on-line tests), automatically grade and report results.	1 2 <u>3</u> 4 <u>5</u>

CASH RECEIPTING SYSTEM			
M	1.	Able to provide detailed receipts.	1 2 3 4 <u>5</u>
M	2.	Able to allow partial payments.	1 2 3 4 <u>5</u>
M	3.	Able to manually distribute partial payments across various components, and track the distribution.	1 2 3 <u>4</u> 5
M	4.	Able to automatically distribute full payments across various fee components to "zero out" remaining fee balances.	1 2 3 4 <u>5</u>
M	5.	Able to automatically distribute partial payments across fee components based on a specified algorithm.	1 2 3 <u>4</u> 5
M	6.	Payments able to be made for non-permit-related items (i.e., misc. accounts receivables, like books, coversheets).	1 2 <u>3</u> 4 5
M	7.	Payments able to be split-tender (e.g., part cash, part credit card).	1 2 3 4 <u>5</u>
M	8.	Credit cards, debit cards and checks able to be used for payment.	1 2 3 4 <u>5</u>
M	9.	Able to tie into General Ledger systems.	1 2 3 4 <u>5</u>
M	10.	Able to provide credit check information.	1 2 <u>3</u> 4 5
M	11.	Able to validate contractor licenses.	1 2 3 4 <u>5</u>
M	12.	Able to refund with complete audit trail.	1 2 3 4 <u>5</u>
M	13.	Able to easily transfer misapplied payments from one project to another.	1 2 3 4 <u>5</u>

GIS			
N	1.	Able to pass a locator ID to an ESRI/Oracle/GIS system, and receive locator IDs and addresses back.	1 2 3 4 <u>5</u>

ADDRESSING			
O	1.	Able to differentiate between development sites and tax parcels.	1 2 3 4 <u>5</u>
O	2.	Able to maintain a history of "legal descriptions" of development sites.	1 2 3 4 <u>5</u>
O	3.	Detailed notes able to be of unlimited size.	1 2 3 <u>4</u> 5

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

ADDRESSING			
O	4.	Able to enter a range of addresses for a project, and specify additional address detail over time.	1 2 3 <u>4</u> 5
O	5.	Able to maintain a history of addresses, even after an address gets superceded by a new one.	1 2 <u>3</u> 4 5
O	6.	Able to display encumbrances on a piece of property (e.g., parking spaces, easement, transfers for development rights).	1 2 3 4 <u>5</u>
O	7.	Able to issue a permit with a range of addresses.	1 2 3 4 <u>5</u>
O	8.	Able to issue a permit with multiple, individual addresses.	1 2 3 4 <u>5</u>
O	9.	Able to notify a user that an address is already associated with a permit.	1 2 3 4 <u>5</u>
O	10.	Able to automatically assign sub-addresses to tenants as they are added within an address range (e.g., strip malls/suites, apartment buildings/apartments).	1 2 3 4 <u>5</u>
O	11.	Associate different buildings IDs with a single address.	1 2 3 4 <u>5</u>
O	12.	Able to parse addresses into distinct fields for street number, street name, prefix, suffix, street type, modifier, building ID, etc.	1 2 3 4 <u>5</u>
O	13.	Able to associate multiple addresses with a single building site address.	1 2 3 4 <u>5</u>
O	14.	Able to validate street names and prevent unauthorized street names from being added.	1 2 3 <u>4</u> 5

REPORTING			
P	1.	Able to generate a variety of documents that will be issued (e.g. variety of permits, notice of application, licenses, license renewal notices, certificates of occupancy, inspection, etc)	1 2 3 <u>4</u> 5
P	2.	Able to generate reports for inspectors that display work queues and detailed task information.	1 2 3 4 <u>5</u>
P	3.	Able to easily generate common report types: number of permits/cases/projects accepted, average time to review, number completed within a year timeframe, and number of correction cycles with associated descriptive tasks.	1 2 3 4 <u>5</u>

INTERNET			
Q	1.	Able to provide permit, cases, projects and permit application information via the Internet, such as application status, inspection information, public notice information, and address history information.	1 2 3 4 <u>5</u>
Q	2.	Able to apply for specific permits via the Internet.	1 2 3 4 <u>5</u>
Q	3.	Able to request/schedule an inspection via the Internet.	1 2 3 4 <u>5</u>
Q	4.	Able to allow public comment on plans, projects and other tracked activities via the Internet.	1 2 3 <u>4</u> 5
Q	5.	Able to execute payment transactions via the Internet (e.g., permit fees and fines).	1 2 3 4 <u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

INTERNET							
Q	6.	Able to register complaints via the Internet.	1	2	3	4	<u>5</u>
Q	7.	Able to submit plans and plan corrections via the Internet.	1	2	3	4	<u>5</u>
Q	8.	Able to link directly to appropriate contact points after submitting complaints via the Internet.	1	2	3	4	<u>5</u>

HAZARDOUS MATERIALS							
R	9.	Able to display hazardous materials lists.	1	2	3	4	<u>5</u>
R	10.	Able to process hazardous materials permit types.	1	2	3	4	<u>5</u>

INTERFACE REQUIREMENTS							
S	1.	Ability to link/integrate to state/local codes	1	2	3	4	<u>5</u>
S	2.	Supports interface to Microsoft Exchange for workflow messaging.	1	2	3	4	<u>5</u>
S	3.	Supports SMTP standard for workflow messaging.	1	2	3	4	<u>5</u>
S	4.	Able to interface/integrate with GIS and standard ESRI products and data. Please explain.	1	2	3	4	<u>5</u>
S	5.	Able to create and load from tape a separate table for validation of California State Contractor License Information. Permits applied for and issued need to validate against this information.	1	2	3	<u>4</u>	<u>5</u>
S	6.	Able to export/import ASCII delimited information and other formats to interface to other Department systems (i.e., spreadsheets such as Microsoft Excel; word processing applications such as Microsoft Word, and database software products such as Access) to automate generation of letters, mailing labels, etc.	1	2	3	<u>4</u>	<u>5</u>
S	7.	Interfaces with standard productivity tools to automate generation of letters, mailing labels and mail-merged files (e.g., MS Office).	1	2	3	<u>4</u>	<u>5</u>
S	8.	Able to accept, read, redline, route, and interface with electronic documents, including AutoCAD, Excel, Word, etc. using a viewer.	1	2	3	4	<u>5</u>
S	9.	Able to interface with a Selectron Interactive Voice Response system to allow customers to make code compliance complaints and inspection requests and provide access to status and inspection results?	1	2	3	4	<u>5</u>
S	10.	Supports bar code generation, scanning, client application entry, faxed or Internet applications, and electronic forms.	1	2	3	<u>4</u>	<u>5</u>
S	11.	This system must interface with HTE.	1	2	3	4	<u>5</u>
S	12.	Is your system capable of developing an interface that passes project hour information and appropriate codes to and from a Department payroll system?	1	2	<u>3</u>	4	<u>5</u>

MAINTENANCE MANAGEMENT

Maintenance Management and Code Enforcement Needs Assessment
 City of Merced

WORK ORDER			
T	1.	The software can be operated by maintenance staff and uses clear, recognizable terminology.	1 2 3 4 <u>5</u>
T	2.	The software can provide status of all outstanding work orders and allow sorts on different status codes.	1 2 3 4 <u>5</u>
T	3.	Users can create sets of commonly needed work plans for use and reuse in the creation of work orders.	1 2 <u>3</u> 4 5
T	4.	Work orders include a searchable variable length text description field large enough to hold at least 500 characters which allows	1 2 3 4 <u>5</u>
T	5.	Selection from pick list	1 2 3 4 <u>5</u>
T	6.	Free form entry	1 2 <u>3</u> 4 5
T	7.	Multiple trades, functions, or divisions can be assigned on work orders.	1 2 3 4 <u>5</u>
T	8.	Multiple types of work orders can be defined according to the type and scope of work involved.	1 2 3 4 <u>5</u>
T	9.	Shops can be added to or deleted from existing work orders.	1 2 3 4 <u>5</u>
T	10.	Work orders can be printed individually or in batches.	1 2 3 4 <u>5</u>
T	11.	Work order fields other than work order number are editable subsequent to entry.	1 2 <u>3</u> 4 <u>5</u>
T	12.	Work order entry software can be configured to print quality assurance questionnaires, customized messages, surveys, etc.	1 2 <u>3</u> 4 5
T	13.	The software provides a way of maintaining a list of persons authorized to expend funds from various accounts.	1 2 3 4 <u>5</u>
T	14.	The software can record information about work requesters such as name, phone number, department, facility address, street address, account numbers, section code, floor number, and email address.	1 2 3 4 <u>5</u>
T	15.	The software can record information about rental equipment, including charge out rates.	1 2 3 4 <u>5</u>
T	16.	Work orders can be routed for review and approval.	1 2 3 4 <u>5</u>
T	17.	Predefined jobs can be selected from a customizable pick list, resulting in fields such as assigned shop, job type, and account number being subsequently incorporated into the work order.	1 2 3 4 <u>5</u>
T	18.	Work orders can be electronically routed to shops, portable electronic devices, and others.	1 2 3 4 <u>5</u>
T	19.	A field identifying the work order data entry operator is included.	1 2 3 4 <u>5</u>
T	20.	Space, equipment, and asset descriptions and work procedures can be included on work orders.	1 2 3 <u>4</u> 5

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

		WORK ORDER					
T	21.	Work orders can be routed to appropriate remote printers depending on the shops assigned.	1	2	3	4	<u>5</u>
T	22.	The software permits concurrent work order entry from multiple client PCs.	1	2	3	4	<u>5</u>
T	23.	Blanket work orders, which periodically undergo re-initialization, can be established as a separate class of work orders.	1	2	3	4	5
T	24.	The software can reference an account number to which costs will be charged using a field of no less than 20 alphanumeric characters.	1	2	3	<u>4</u>	5
T	25.	Charge records can include user-definable fields containing accounting transaction codes.	1	2	3	<u>4</u>	5
T	26.	The software can post charges to work orders daily or more frequently.	1	2	3	<u>4</u>	5
T	27.	Charges can be posted to work orders that have not been closed.	1	2	3	<u>4</u>	5
T	28.	Unlimited items can be posted to work orders.	1	2	3	<u>4</u>	5
T	29.	Labor, material, and equipment rental costs may be posted to work orders interactively or via batch processing.	1	2	3	4	<u>5</u>
T	30.	Comments may be attached to work orders interactively or via batch processing.	1	2	3	4	<u>5</u>
T	31.	The software can export charge data so that data can be transferred to the City accounting system.	1	2	3	4	<u>5</u>
T	32.	Work order charges may be charged to multiple accounts in varying percentages or dollar amounts.	1	2	3	4	<u>5</u>
T	33.	A work order record can include a budgeted amount and a remaining balance.	1	2	<u>3</u>	4	5
T	34.	Users can perform ad hoc queries of work order costs using multiple complex search criteria, Boolean logic, and multiple sorting criteria, including (but not limited to) department, account, cost center, building, space, shop, date, and user-defined fields.	1	2	3	4	<u>5</u>
T	35.	The software can be configured to add a markup to charges depending on accounting transaction codes.	1	2	3	4	<u>5</u>
T	36.	The software can bill customers a flat fee or actual labor, material, equipment, and rental costs on a work order by work order basis.	1	2	3	4	<u>5</u>
T	37.	The software can classify all work by some kind of code: preventive maintenance (PM), corrective, breakdown, management decision, inspection, survey, new construction, etc.	1	2	3	4	5
T	38.	The software has the ability to attach vendor work orders to City work orders.	<u>1</u>	2	3	4	5
T	39.	The software can drill down to sub-tasks, which can be deferred.	1	2	3	4	<u>5</u>
T	40.	The software can create a work order from a work request.	1	2	3	<u>4</u>	5
T	41.	The software can prompt user for status of outstanding work orders based on user requirements.	1	2	3	4	<u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

WORK ORDER			
T	42.	Work request forms can be tailored to the type of service requested (e.g., by prompting for account information only if service is billable).	1 2 3 <u>4</u> 5
T	43.	The software can be configured such that completion of certain fields of the work request form are mandatory.	1 2 3 4 <u>5</u>
T	44.	The software provides a means of authentication so that only authorized users can submit work requests.	1 2 3 4 <u>5</u>
T	45.	Work order request number is assigned and reported to the customer upon submission of a work request.	1 2 3 4 <u>5</u>
T	46.	Incoming work requests are time stamped.	1 2 3 4 <u>5</u>
T	47.	The software allows personnel to determine status of their work request without being able to make changes.	1 2 3 4 <u>5</u>
T	48.	Authorized customers can view cost details such as labor, material, rental, and outside services and can determine whether work is billed on actual costs or a flat fee.	1 2 3 4 <u>5</u>
T	49.	Reports can be generated by personnel, including cost summary reports and work order status reports.	1 2 3 4 <u>5</u>

WORK SCHEDULING			
Q	1.	Customer work requests can be assigned priorities according to work code, status, category of work, etc.	1 2 3 4 <u>5</u>
Q	2.	The software can calculate backlog of work and display it by craft.	1 2 3 4 <u>5</u>
Q	3.	Employees can be assigned to work orders, work assignments can be revised either manually or automatically, work can be scheduled, and schedules can be revised.	1 2 3 4 <u>5</u>
Q	4.	The software can facilitate labor scheduling with labor standards (e.g., date, responsible person, action, etc.) by task, ability to sort and resort the open work orders by location of work, craft, and other ways.	1 2 3 4 <u>5</u>
Q	5.	The software can provide utilization reports on employees and equipment as an aid to planning and scheduling.	1 2 3 4 <u>5</u>
Q	6.	The software can record and report information on employee availability and training; e.g., work schedule and calendar.	1 2 <u>3</u> 4 5
Q	7.	The software has the ability to automatically classify a work request as ready for planning on approval of the request.	1 2 <u>3</u> 4 5
Q	8.	The software can automatically assign the next task by priority to personnel.	1 2 <u>3</u> 4 5
Q	9.	The software has the option to automatically notify all affected employees of work request status.	1 2 <u>3</u> 4 5
Q	10.	The software can create dependencies between work orders to aid in planning, based on:	1 2 3 <u>4</u> 5
Q	11.	Equipment	1 2 3 <u>4</u> 5
Q	12.	Projects	1 2 <u>3</u> 4 5

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

WORK SCHEDULING			
Q	13.	Shutdowns	1 2 <u>3</u> 4 5
Q	14.	Job sequence	1 2 3 <u>4</u> 5
Q	15.	Job site	1 2 <u>3</u> 4 5
Q	16.	The software can identify and prioritize workload based on:	<u>1</u> 2 3 4 5
Q	17.	Incoming job requests	<u>1</u> 2 3 4 5
Q	18.	Job orders on hold	<u>1</u> 2 3 4 5
Q	19.	Outstanding job orders	<u>1</u> 2 3 4 5
Q	20.	Job orders in progress	<u>1</u> 2 3 4 5
Q	21.	PM job orders	1 2 3 <u>4</u> 5
Q	22.	The software can establish work priority by:	<u>1</u> 2 3 4 5
Q	23.	Safety issues – hazardous locations	<u>1</u> 2 3 4 5
Q	24.	Emergency	1 2 3 <u>4</u> 5
Q	25.	Preventive maintenance	1 2 3 <u>4</u> 5
Q	26.	Schedule/routine	1 2 3 <u>4</u> 5
Q	27.	Age	<u>1</u> 2 3 4 5
Q	28.	Criticality	<u>1</u> 2 3 4 5

PREVENTATIVE MAINTENANCE			
R	1.	The software can maintain a database of information on assets and equipment, including such items as type and location of asset, manufacturer's specifications, instructions, drawings, serial number, etc.	1 2 3 4 <u>5</u>
R	2.	An asset can be designated as a component of another asset.	1 2 3 4 <u>5</u>
R	3.	The software can maintain the preventive maintenance (PM) histories of assets and equipment for an indefinite period of time.	1 2 3 4 <u>5</u>
R	4.	Priorities can be assigned to assets and equipment, and PM priorities can reflect asset and equipment priorities.	1 2 3 4 <u>5</u>
R	5.	The software can schedule PM orders by fixed or sliding calendar intervals, usage, or on demand.	1 2 3 4 <u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

PREVENTATIVE MAINTENANCE							
R	6.	Preventive maintenance activities can be scheduled on specified dates, days of the week, days of the month, and may be restricted to specified seasons.	1	2	3	4	5
R	7.	Preventive maintenance orders are part of a hierarchical arrangement whereby the scheduling of certain PM orders prevents the scheduling of other PM orders so that, for example, quarterly or semi-annual PM orders will not be scheduled at the same time as an annual PM order.	1	2	3	4	<u>5</u>
R	8.	Sets of PM tasks can be defined for groups of similar equipment.	1	2	3	4	<u>5</u>
R	9.	Existing PM plans can be copied to create new PM plans.	1	2	3	4	<u>5</u>
R	10.	The software can record and print labor, materials, equipment, and tools required to perform each PM order.	1	2	3	4	<u>5</u>
R	11.	Preventive maintenance procedures can be up to 10 pages of text and schematics; other drawings can also be printed with the work order.	1	2	3	4	<u>5</u>
R	12.	Predefined sets of PM procedures can be referenced by any number of PM orders.	1	2	3	4	<u>5</u>
R	13.	The software can project manpower requirements, including type and number of personnel, for a specified future time period, such as a week, month, or year, based on information in PM plans.	1	2	3	4	<u>5</u>
R	14.	The software can project materials requirements for a specified future time period, such as a week, month, or year, based on information in PM plans.	1	2	<u>3</u>	4	5
R	15.	Preventive maintenance orders can be assigned to specific employees or groups of employees.	1	2	3	4	<u>5</u>
R	16.	The software can generate reports of overdue PM orders.	1	2	3	4	<u>5</u>
R	17.	The software can generate reports detailing adherence of actual PM performance to planned PM performance, including labor required and materials used.	1	2	<u>3</u>	4	5
R	18.	The software can maintain records and generate reports relating to work performance.	1	2	<u>3</u>	4	5
R	19.	The software can create optimal ordering and routing for the performance of PM orders.	1	2	<u>3</u>	4	5
R	20.	Personnel can easily record short repairs done during PM inspections in addition to the PM and actual time spent.	1	2	3	4	<u>5</u>
R	21.	The software can aid in performing failure analysis by providing reports such as failure frequency by building, by component, by equipment type, by manufacturer, by maintenance regimen, etc.	1	2	3	<u>4</u>	5
R	22.	And indicate to the user where else those failures are likely to occur based on history and item location.	1	2	3	<u>4</u>	5
R	23.	The software provides the option to bypass PM in the event of emergent or critical work orders.	1	2	3	4	<u>5</u>
R	24.	The software can recalculate the preventive maintenance estimates of labor hours based on history of actual hours.	1	2	3	<u>4</u>	5

PROJECT MANAGEMENT

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

PROJECT MANAGEMENT			
S	1.	The software can create and manage projects consisting of an unlimited number of sub-projects, work orders, or activities.	1 2 <u>3</u> 4 5
S	2.	The software allows detailed descriptions of projects.	1 2 3 4 <u>5</u>
S	3.	Project data can be exported to and imported from specialized scheduling software such as Primavera and Microsoft Project.	<u>1</u> 2 3 4 5
S	4.	The software provides a database of common jobs together with their typical labor, material, and equipment requirements.	1 2 3 4 <u>5</u>
S	5.	The software can create optimal ordering and routing for the performance of work orders.	1 2 <u>3</u> 4 5
S	6.	The software can notify user of potential resource shortages or high-demand periods and perform load-leveling functions.	1 2 <u>3</u> 4 5
S	7.	Estimates of project costs can be compared to actual costs and billed costs in report form as well as onscreen, at any stage of project.	1 2 3 4 <u>5</u>
S	8.	Software can produce completion checklists.	1 2 3 4 <u>5</u>
S	9.	Project can be accounted through general ledger, purchase order tracking, invoicing/AR, reconciliation, assigned overhead, budgeting capability.	1 2 3 4 <u>5</u>
S	10.	The software has the ability to track change orders.	1 2 3 4 <u>5</u>
S	11.	The software can record information about project estimates.	1 2 3 4 <u>5</u>
S	12.	Costs are automatically rolled up to appropriate facility, building, space, room, department, division, section, asset, or account records.	1 2 3 4 <u>5</u>
S	13.	The software can generate reports on actual versus estimated costs.	1 2 3 4 <u>5</u>
S	14.	The software can store and retrieve all costs associated with a project, including internal charges and contract charges.	1 2 3 4 <u>5</u>
S	15.	With appropriate security, charges can be posted to a closed work order.	1 2 3 4 <u>5</u>
S	16.	The software can generate reports on billed charges vs. estimated costs.	1 2 3 4 <u>5</u>
S	17.	The software can alert designated personnel when actual costs are nearing estimated or budgeted costs.	1 2 3 4 <u>5</u>

ASSET MANAGEMENT			
T	1.	Facility Management	1 2 3 4 <u>5</u>
T	2.	The software can store information on assets and equipment such as buildings, rooms, indoor and outdoor spaces and facilities, infrastructure, tools, supplies, vehicles, or other material items of value to the City.	1 2 3 4 <u>5</u>
T	3.	The software can maintain a database of buildings, rooms, and other spaces, as well as information about those spaces, their furnishings, and inhabitants.	1 2 3 4 <u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

ASSET MANAGEMENT							
T	4.	The software includes graphical representations of buildings, rooms, other spaces, furnishings, and inhabitants.	1	2	3	<u>4</u>	5
T	5.	The graphical representation provides links to database information, including asset, equipment, and inhabitant lists.	1	2	3	4	<u>5</u>
T	6.	The software can import AutoCAD drawings and drawings in other formats.	1	2	3	4	<u>5</u>
T	7.	The software allows the correlation of physical assets such that component parts of an asset can be related to each other.	1	2	3	4	<u>5</u>
T	8.	The software maintains the currency of asset information based on as-built information and completed work orders.	1	2	3	4	<u>5</u>
T	9.	The software has the ability to manage asset licenses and warranties.	1	2	3	4	<u>5</u>
T	10.	The software supports the development and maintenance of Program Driven Maintenance (PDM) specifications for individual assets and asset groups.	1	2	<u>3</u>	4	5
T	11.	Key Control	1	2	3	4	5
T	12.	The software can maintain a database of information on keys and locks, including such items as lock location, on-hand and total key quantities, key type (master, sub-master, etc.), and date of last re-keying.	1	2	<u>3</u>	4	5
T	13.	The software can store multiple key aliases for the same key.	1	2	<u>3</u>	4	5
T	14.	The software can maintain a database of information on key holders, including such items as name, type (faculty, staff, students, vendors, visitors, etc.), department, identification number, email address, address, telephone number, and/or other contact information.	1	2	<u>3</u>	4	5
T	15.	The software places no limits on the number of keys that can be issued to a key holder.	1	2	<u>3</u>	4	5
T	16.	The software has the ability to store information on issue, return, lost, payment, and refund transactions as well as transaction dates, with whom transactions take place, and notes about transactions.	1	2	<u>3</u>	4	5
T	17.	The software can generate various reports, including reports of key schedules, key transactions, and key holders (such as a list of all those having access to given areas).	1	2	<u>3</u>	4	5
T	18.	The software can generate charge records that may be used to bill Departments for lost keys or other key fees.	1	2	<u>3</u>	4	5
T	19.	Equipment Management	1	2	3	4	5
T	20.	Asset and equipment work order and maintenance histories, including accumulated costs and depreciation, can be recorded, and these records are directly available from asset display windows.	1	<u>2</u>	3	4	5
T	21.	Asset and equipment records can be linked to detailed stored specifications and/or schematics.	1	2	3	4	<u>5</u>
T	22.	Asset records can contain detailed lockout tag-out procedures.	1	2	3	4	<u>5</u>
T	23.	Asset records can contain or reference confined space permits and instructions.	1	2	3	4	<u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

ASSET MANAGEMENT							
T	24.	Asset and equipment records can include user-definable fields indicating the presence and nature of hazardous materials.	1	2	3	4	<u>5</u>
T	25.	Failure codes and descriptions can be assigned to asset records.	1	2	3	4	<u>5</u>
T	26.	Asset and equipment records can contain a history of condition assessments.	1	2	3	4	<u>5</u>
T	27.	Asset and equipment records can contain cost center account numbers to which costs can be charged by default.	1	2	3	4	<u>5</u>
T	28.	The software can maintain a database of tools and equipment available for checkout, including information such as on-hand and total quantities, charge-out rates, warranty information, and serial numbers of serialized equipment.	1	2	3	4	<u>5</u>
T	29.	The software can maintain an inventory of consumable tools and generate re-order lists as needed.	1	2	3	4	<u>5</u>
T	30.	The software can record the checkout and check in of tools and equipment.	1	2	3	4	<u>5</u>
T	31.	Checkouts can be designated as permanent or temporary.	1	2	3	4	<u>5</u>
T	32.	The software can create charge records for billing purposes.	1	2	3	4	<u>5</u>
T	33.	Default charges can be manually overridden.	1	2	3	4	<u>5</u>
T	34.	Asset records can include quantity information to handle the occurrence of multiple, identical, non-serialized items in the tool inventory.	1	2	3	4	<u>5</u>
T	35.	Asset records can include or reference such information as PM histories, maintenance costs, and revenue totals for individual serialized tools.	1	2	3	4	<u>5</u>
T	36.	System tracks warranty information for components, and flags warranty work to recover funds, and store information regarding service contracts and their periods.	1	2	3	4	<u>5</u>
T	37.	The software can record information about customers, including name, shop and other contact details.	1	2	3	4	<u>5</u>
T	38.	The software can interface with card reader and bar code input devices to scan employee ID cards and record tool and equipment issues, returns, and inventory.	1	2	3	4	<u>5</u>
T	39.	The software can record electronic signature images to validate check-out and check in of tools and equipment.	1	2	3	4	<u>5</u>
T	40.	The software can print receipts upon check in of tools and equipment.	1	2	3	4	<u>5</u>
T	41.	The software can generate commonly needed reports, such as past due lists, lists of tools checked out by employee or shop, and lists of permanent issues by shop.	1	2	3	4	<u>5</u>
T	42.	The software can display on-hand quantities of tools and equipment.	1	2	3	4	<u>5</u>
T	43.	The software can be used to reserve and rent vehicles of several types, display their availability, and report revenues.	1	2	3	4	<u>5</u>

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

ASSET MANAGEMENT							
T	44.	Capable of generating reports of required spare parts, cross reference parts/equipment substitute parts, vendors for each piece of capital equipment, and listing of equipment location.	1	2	3	4	<u>5</u>
T	45.	The software provides (or interfaces to) an on-line catalog of equipment parts.	1	2	3	4	<u>5</u>
T	46.	The software can record depreciation of assets or equipment.	1	2	3	4	<u>5</u>

INTERFACE REQUIREMENTS							
U	1.	Software can link to Scada systems to selected Scada data.	1	2	3	4	<u>5</u>
U	2.	The software provides facilities to allow customers to make work requests via a Web form utilizing a standard Web browser.	1	2	3	4	<u>5</u>
U	3.	The software generates email notifications of receipt and status of Work requests to customers.	1	2	3	4	<u>5</u>
U	4.	Work requests entered via the Web will update the software's database tables so that such requests need not be re-entered.	1	2	3	4	5
U	5.	The software provides graphical access to work orders via floor plans and the City's electronic maps (AutoCAD, GIS, ESRI) and plans.	1	2	3	4	<u>5</u>
U	6.	The software provides configurable email links to departmental functions and employees.	1	2	3	4	<u>5</u>
U	7.	The software allows special formatting capabilities for alerts and special messages appearing on Web pages or forms.	1	2	3	4	<u>5</u>
U	8.	The software can email various kinds of other alerts to designated personnel.	1	2	3	4	<u>5</u>
U	9.	The software can publish event plans to the Web for customer review.	1	2	3	4	<u>5</u>
U	10.	The software can accept electronic work requests from other interfaced applications, such as HTE, Accela.	1	2	3	4	<u>5</u>
U	11.	Pagers	1	2	3	4	<u>5</u>
U	12.	OneCall	1	2	3	4	<u>5</u>
U	13.	PDA	1	2	3	4	<u>5</u>
U	14.	Billing automation system	1	2	3	4	<u>5</u>
U	15.	The software provides a means to display on Web pages a catalog showing on-hand quantities and rental rates of equipment, furnishings, and other items available for reservation and rent.	1	2	3	4	<u>5</u>

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

		INVENTORY MANAGEMENT					
V	1.	Purchasing	1	2	3	4	<u>5</u>
V	2.	Software can automatically or manually generate a purchase order based on user determined inventory levels.	1	2	3	4	<u>5</u>
V	3.	Ability to update partial receipt through PO/requisition tracking.	1	2	3	4	<u>5</u>
V	4.	The software can print a reorder list of items at or below reorder point and sort by commodity code, vendor, or stock number	1	2	3	4	<u>5</u>
V	5.	One requisition can have several purchase order numbers assigned to it.	1	2	3	4	<u>5</u>
V	6.	The software makes a distinction between requisitions and purchase orders.	1	2	3	4	<u>5</u>
V	7.	Requisition and purchase order numbers can be assigned by user and the purchase order number can be different from the requisition number.	1	2	3	4	<u>5</u>
V	8.	The software can suggest order quantity based on a user-defined maximum on-hand quantity.	1	2	3	4	<u>5</u>
V	9.	Non-stock materials can be ordered against the stock cost center, referencing a work order, which will be charged upon receipt or issue of the goods. Alternately, special order materials can be ordered directly against the final cost center, with charges not billed through the work order system, while still allowing costs to be accumulated under the appropriate work order. Markup is added regardless of which of the above methods is used.	1	2	<u>3</u>	4	5
V	10.	The software can create a request for quotation that can be edited while retaining sequential item numbering and proper formatting.	1	2	3	4	<u>5</u>
V	11.	Item Data	1	2	3	4	<u>5</u>
V	12.	The software can maintain separate on-hand quantity, reorder point, and transaction history (min. of five years) for multiple stocking locations.	1	2	3	4	<u>5</u>
V	13.	Item records can contain or reference a notes field, which is not part of an item's description.	1	2	3	4	<u>5</u>
V	14.	The software provides user-definable categories that allow users to classify stock items as "seasonal," "discontinued," "hazardous," etc. The software can record commodity codes in a user-definable format.	1	2	3	4	<u>5</u>
V	15.	The software can record stock numbers of at least seven digits in a user-definable format.	1	2	3	4	<u>5</u>
V	16.	Markup percentage can be defined by item or class of item rather than universally.	1	2	<u>3</u>	4	5
V	17.	Any transaction affecting on-hand quantities increments or decrements on-hand quantities immediately.	1	2	3	4	<u>5</u>
V	18.	Items may be flagged as "No Reorder" to prevent their appearance on reorder reports, but can be issued to use up existing stock.	1	2	3	4	<u>5</u>
V	19.	The software does not allow deleting items with on-hand or on-order quantities.	1	2	3	4	5
V	20.	Item records contain a separate field for manufacturer part number.	1	2	3	4	<u>5</u>

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

		INVENTORY MANAGEMENT					
V	21.	Item records can include or can reference item images.	1	2	3	4	<u>5</u>
V	22.	The software can store Material Safety Data Sheets for hazardous stock items.	1	2	3	4	<u>5</u>
V	23.	The software can store date established, last receipt date and last issued date.	1	2	3	4	<u>5</u>
V	24.	The software can store quantity on-order and expected due date (based on date entered by purchaser on purchase order).	1	2	3	4	<u>5</u>
V	25.	The extended description can contain a minimum of 400 characters.	1	2	3	4	<u>5</u>
V	26.	The software can assign costs for items in inventory directly to the appropriate account.	1	2	3	4	<u>5</u>
V	27.	Individual stock items can be pre-assigned to a work order and inventory adjusted accordingly.	1	2	3	4	<u>5</u>
V	28.	Inventory Control	1	2	3	4	<u>5</u>
V	29.	The software can import physical inventory from a file.	1	2	3	4	<u>5</u>
V	30.	Software can generate a physical inventory list for regular periodic audits.	1	2	3	4	<u>5</u>
V	31.	Software can automatically decrement inventory levels.	1	2	3	4	<u>5</u>
V	32.	The user can establish variance thresholds between physical and stored counts that can be used to perform recounts of items outside the variance threshold. The threshold can be either a percentage of the count, unit of count, or an absolute dollar amount.	1	2	3	4	<u>5</u>
V	33.	Items not found in an imported physical count are flagged for recount if the stored quantity is not zero or are freed from the inventory process if the stored quantity is zero.	1	2	3	4	<u>5</u>
V	34.	When a physical inventory file is imported, the software can generate a report that indicates those items that have been:	1	2	3	4	<u>5</u>
V	35.	been flagged for recount	1	2	3	4	<u>5</u>
V	36.	been freed from the inventory process	1	2	3	4	<u>5</u>
V	37.	had their stored counts adjusted	1	2	3	4	<u>5</u>
V	38.	inventoried which do not exist in the database	1	2	3	4	<u>5</u>
V	39.	stored which do not appear in the physical inventory	1	2	3	4	<u>5</u>
V	40.	The user can edit on-hand quantities or locations.	1	2	3	4	<u>5</u>
V	41.	The software can report net variances between stored and physical count at any stage of the recount and count adjustment process.	1	2	3	4	<u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

INVENTORY MANAGEMENT							
V	42.	The software can adjust recorded quantities between count cycles due to variances between actual and recorded quantities and can record such adjustments as transactions.	1	2	3	4	<u>5</u>
V	43.	Software can record a part location to help find infrequently used parts.	1	2	3	4	<u>5</u>
V	44.	The software maintains a transaction history for all adjustments made during the inventory process.	1	2	3	4	<u>5</u>
V	45.	The software supports the creation and selection of compatible units.	1	2	3	4	<u>5</u>
V	46.	The software can create pick lists for parts and tools required for a work order so that the warehouse and tool room can issue and stage the parts and tools before the job starts.	1	2	3	4	<u>5</u>

ISSUES							
W	1.	The software provides a way to document the physical issue of non-stock items received for a work order, including a record of the date picked up and person accepting goods from stores.	1	2	3	4	<u>5</u>
W	2.	Items to be issued can be selected from a list of query results.	1	2	3	4	<u>5</u>
W	3.	The software can issue non-inventoried items such as screws, nuts and bolts:	1	2	3	4	<u>5</u>
W	4.	by dollar value	1	2	3	4	<u>5</u>
W	5.	by quantity	1	2	3	4	<u>5</u>
W	6.	The software alerts the user before creating a back-order at the point of issue or does not allow back-orders at issue.	1	2	3	4	<u>5</u>
W	7.	The software allows no negative on-hand quantities.	1	2	3	4	<u>5</u>
W	8.	The software offers a method to transfer costs of items originally issued for truck stock to work orders for which the items are ultimately used.	1	2	3	4	<u>5</u>
W	9.	Issuing or returning an item, whether stock or special order, automatically charges or credits a work order, account number, asset, etc., as appropriate.	1	2	3	4	<u>5</u>
W	10.	Non-purchased items can be entered into inventory.	1	2	3	4	<u>5</u>
W	11.	Issued items can be charged to either a work order or a cost center.	1	2	3	4	<u>5</u>
W	12.	The software alerts users when issuing items with Material Safety Data Sheets (MSDS) information and gives the option of printing it.	1	2	3	4	<u>5</u>
W	13.	Items can be issued or returned using a bar code scanning device.	1	2	3	4	<u>5</u>
W	14.	UPC codes can be stored and bar code labels can be printed.	1	2	3	4	<u>5</u>

ISSUES			
W	15.	When a user revises an incorrect issue transaction, the software implements the revision by creating both a corrected charge transaction and a credit transaction to negate the incorrect issue, so that the user need not create these transactions manually.	1 2 3 4 <u>5</u>

RECEIPTS			
X	1.	Non-stock items can be received and issued directly on a work order without passing through inventory. A mark-up may still be charged for these items.	1 2 3 4 <u>5</u>
X	2.	Freight costs and sales taxes can be distributed to all items in a given receipt, increasing item costs by appropriate amounts, whether or not the receipt includes all items appearing on the purchase order.	1 2 3 4 <u>5</u>
X	3.	The software can print a receiving worksheet containing the items ordered, unit cost, extended costs, as well as quantities of items previously received, if any.	1 2 3 4 <u>5</u>
X	4.	The software can record the receipt of items procured by blanket purchase order.	1 2 3 4 <u>5</u>
X	5.	The software can, at the time items are received, distribute to those items special costs such as tire disposal fees, drum and pallet deposits, etc.	1 2 3 4 <u>5</u>
X	6.	A return transaction can be created that negates a receipt transaction. This process would correct changes to on-hand quantities and purchase histories resulting from the original receipt transaction, and would, if desired, correct on-order quantities and would allow the purchase order to be annotated to reflect that received items have been returned.	1 2 3 4 <u>5</u>
X	7.	The software can prohibit receipt in units other than as ordered.	1 2 3 4 <u>5</u>

QUERIES AND REPORTS			
Y	1.	Closed work orders can be reported by quantity, equipment, hours, labor dollars, material dollars, outside vendor hours/dollars, and total dollars.	1 2 3 4 <u>5</u>
Y	2.	Can produce work load reports by craft, period, equipment, location, employee, account, priority, etc.	1 2 3 4 <u>5</u>
Y	3.	The software can be customized by creating and saving reports in assorted formats according to various selection, grouping, sorting, and subtotaling criteria.	1 2 3 4 <u>5</u>
Y	4.	The software can query data using wildcards in any or all description fields.	1 2 3 4 <u>5</u>
Y	5.	The software can report items not issued within a range of dates.	1 2 3 4 <u>5</u>
Y	6.	The software can report at least 2 years' monthly issue summary reports.	1 2 3 4 <u>5</u>
Y	7.	The software can report items with a quantity of zero.	1 2 3 4 <u>5</u>
Y	8.	The software can report orders not fully received by due date.	1 2 3 4 <u>5</u>
Y	9.	The software can list requisitions not yet converted to purchase orders.	1 2 3 4 <u>5</u>

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

		QUERIES AND REPORTS					
Y	10.	The software can report the status of items ordered against work orders, including current status of an order, the purchase order number, quantity ordered, quantity received to date, due date, etc.	1	2	3	4	5
Y	11.	The software can report stock items issued against work orders.	1	2	3	4	5
Y	12.	The software can query purchase orders using vendor name or partial vendor name.	1	2	3	4	5
Y	13.	The software can query purchase orders for non-stock items using the item description or wildcards.	1	2	3	4	5
Y	14.	The software can query purchase orders for non-stock items using cost center number.	1	2	3	4	5
Y	15.	The software can query purchase orders for non-stock or stock items using building code.	1	2	3	4	5
Y	16.	The software can query purchase orders for stock items using stock number.	1	2	3	4	5
Y	17.	The software can print a daily report of all issue activity for a specified date or range of dates.	1	2	3	4	5
Y	18.	The software can print a daily report of all receipt activity for a specified date or range of dates.	1	2	3	4	5
Y	19.	The software can query, report, and sort items by such criteria as stock number, commodity code, short description, bin location and primary vendor.	1	2	3	4	5
Y	20.	Query results are displayed with links to more detailed information.	1	2	3	4	5
Y	21.	A complete audit trail (e.g., date, responsible person, action, etc.) is maintained for each transaction by stock number, work order, account number, or asset.	1	2	3	4	5
Y	22.	The software can report complete inventory valuation using the FIFO valuation accounting method.	1	2	3	4	5
Y	23.	The software can query any item by manufacturer or part number (manufacturer's or City's).	1	2	3	4	5
Y	24.	The software can query and report summary purchase history by craft and/or requester.	1	2	3	4	5
Y	25.	The software can report all vendors from which an item has been purchased.	1	2	3	4	5
Y	26.	The software can provide information to track service requests -maintenance work order issue - work complete - customer satisfied cycle. Include elapsed time and other analysis factors.	1	2	3	4	5
Y	27.	The software can provide reports on contractor versus in-house work and can track contractor work in as much detail as in-house work.	1	2	3	4	5
Y	28.	The software has the ability to easily structure, retain, and export ad hoc reports.	1	2	3	4	5
Y	29.	The software can create graphs and charts.	1	2	3	4	5
Y	30.	The software can export data to statistical software packages.	1	2	3	4	5
Y	31.	Software is capable of producing a variety of user-defined project reports.	1	2	3	4	5

Scale: 1 – Optional 3 – Desirable 5 - Mandatory

QUERIES AND REPORTS							
Y	32.	Users can perform ad hoc queries of work orders using multiple complex search criteria, Boolean logic, and multiple sorting criteria, including (but not limited to) department, account, cost center, building, space, shop, and user-defined fields.	1	2	3	4	<u>5</u>
Y	33.	Aging work orders can be easily identified and reported by category, priority, status, etc.	1	2	3	4	<u>5</u>
Y	34.	Search results can be displayed in tables that include links to detailed records.	1	2	3	4	<u>5</u>

EVENTS MANAGEMENT							
Z	1.	The software can store information such as dates, special setup details, manpower needs, reserved equipment, and associated work order numbers for scheduled events.	1	2	3	4	<u>5</u>
Z	2.	The software provides a means to reserve and rent equipment, furnishings, and other items for specified scheduled events.	1	2	3	4	<u>5</u>
Z	3.	The software can maintain a database of equipment, furnishings, and other items available for reservation and rent.	1	2	3	4	<u>5</u>
Z	4.	The software can record the serial number of serialized equipment.	1	2	3	4	<u>5</u>
Z	5.	The software can record the reservation of one or more of the same non-serialized item.	1	2	3	4	<u>5</u>
Z	6.	The software can record contact information for multiple contacts.	1	2	3	4	<u>5</u>
Z	7.	The software provides a means to query the availability of equipment, furnishings, and other rental items for given date ranges.	1	2	3	4	<u>5</u>
Z	8.	The software provides an appointment calendar.	1	2	3	4	<u>5</u>
Z	9.	The software provides a way to plan and schedule preparations for events and to alert workers to daily scheduled tasks.	1	2	3	4	<u>5</u>
Z	10.	The software can publish event plans to the Web for customer review.	1	2	3	4	<u>5</u>

MISCELLANEOUS							
AA	1.	The software supports the state-mandated inventory valuation process requirement and retains the purchase cost data and date for all on-hand items.	1	2	3	4	<u>5</u>
AA	2.	The software allows global updates to markups, commodity codes, etc.	1	2	3	4	<u>5</u>
AA	3.	Requisitions can be routed for review and approval prior to submission to purchasing personnel.	1	2	3	4	<u>5</u>
AA	4.	The software provides a way of maintaining a list of persons authorized to expend funds from various accounts.	1	2	3	4	<u>5</u>
AA	5.	The software can record information about employees, including name, identification number, salary, charge out rates, vacation time, etc.	1	2	3	4	<u>5</u>

**Maintenance
 Management and
 Code
 Enforcement
 Needs
 Assessment**

City of Merced

MISCELLANEOUS							
AA	6.	The software can export charge data so that data can be transferred to the City accounting system.	1	2	3	4	<u>5</u>
AA	7.	The software can record when and by whom edits to accounting data are made.	1	2	3	4	<u>5</u>
AA	8.	The software permits concurrent accounting data entry from multiple client PCs.	1	2	3	4	<u>5</u>
AA	9.	Software can allow for multiple overtime rates.	1	2	3	4	<u>5</u>