



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 1 of 74

PURCHASE NET

Mail Sealed Bid TO:		Sealed bid due by:	Bid Opening:
City of Tulsa 200 Civic Center, Room 109 Tulsa, Oklahoma 74103		5:00 PM Wednesday April 17, 2002	8:30 AM the next day City Council Room Dual opening: <input type="checkbox"/> Yes; <input checked="" type="checkbox"/> No
Envelope/Box Labeling:		Bid Bond Required: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Bid Number and opening date must appear on the lower left corner of all envelopes and box tops.		Performance Bond: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
		PreBid Conference: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Response to this request must be submitted on this form. Requested information must sequentially follow the document outline. Additional sections or appendices must not be added to the bid format. Any supporting or supplemental documents must be attached to the back of the Technical bid packet and labeled "Supporting Documentation" or placed in a separate binder labeled "Supporting Documentation".			<u>10</u> Copies Required
Published:	Tulsa Daily Commerce and Legal News(announcement only) March 15, 2002		
	Purchase Net Fax-on-Demand: 918-596-1171 (for index)		
	Purchase Net Website: www.cityoftulsapurchasing.org		
City Contacts:	Project Buyer:		
	Bill Youngblood, CPM byoungblood@ci.tulsa.ok.us Fax: 918-699-3153; Phone: 918-596-7551		
Acknowledgement of intent to bid:	E-mail the Project Buyer of your intent. If you don't receive a return e-mail within 48 hours, contact the Project Buyer		
Bidder Questions:	Email all questions to Project Buyer. Please do not contact COT staff.		
Addendum:	All addenda will be communicated to all known respondents in writing. Any verbal communications by any City personnel or their agent will not be a part of these bid specifications.		
NIGP Codes:	204-00; 918-30; 920-37		

RETURN THIS ENTIRE RFB PACKET WITH ANY SUPPORTING DOCUMENTS ATTACHED TO THE BACK

I have read and understand these Bid Specifications and agree to adhere to all terms and conditions contained herein. I have included all costs in my bid to implement the solution requested in these bid specifications. Exceptions must be described in detail and attached to this bid packet. *Note: Taking an exception to a "must item" may cause your bid to be rejected. (DO NOT PRINT SIGNATURE)*

Firm name: _____ Date: _____

Street: _____ County: _____ City/State: _____ Zip: _____

E-Mail _____ Fax: _____ Phone: _____

Print Name: _____ Signature: _____

(Authorized agent for the firm shown)

**** Entire packet must be notarized by Notarizing this page****

Subscribed and sworn to before me this _____ day of _____, 19____.

Signature of Notary Public _____ MY COMMISSION EXPIRES: _____

**Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02**

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 2 of 74

TABLE OF CONTENTS

<u>General Section Topics</u>	<u>Page</u>
Cover Page *** <i>(Must contain proper signature and be notarized)</i> ***	1
Table of Contents of General Section	2
Addenda	3
Interest Affidavit *** <i>(Must contain proper signature and be notarized)</i> ***	7
Bidder Affidavit *** <i>(Must contain proper signature and be notarized)</i> ***	8
Contractor / Bidder Information Sheet	9
General Terms and Conditions	10
Special Terms and Conditions	23
<u>Technical Specifications Section</u>	<u>Page</u>
Cover Page for Technical Specifications	28
Table of Contents for Technical Specifications	29
Section 1: RFB Questionnaire	30
Section 2: System Implementation, Acceptance, and Support	46
Appendix A: Detailed Cost Summary	53
Appendix B: Required Data Elements	59
Appendix C: Standard and Ad Hoc Report Requirements	66
Appendix D: System History and Expectations	69
Appendix E: Workstation Requirements	71
Appendix F: Exceptions Taken to Specifications	72
Appendix G: Price Adjustment Option	73
Appendix H: Bidder Check List	74

Important: Your bid will be rejected if not properly signed and notarized on those pages indicated above.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 3 of 74

01-406 Re bid Work Order and Inventory Management Software

Addendum #1:

1. I do not see where it spells out exactly what items should be included in the calculation of the Bid Bond amount.

The bid bond is based on the "Total Cost" as shown at the bottom of the Detailed Cost summary includes items 1 thru 5.

2. With the Performance Bond, I can see that we are to add the total amount in the "Basic Contract Services" section to the total amount in the "Professional Services" section to calculate the total for the Performance Bond. Are we to use the sum of these same two sections to calculate the Bid Bond? I just wanted to make sure that the totals for the "Support Costs", "Other Costs", and "Costs Not Included" sections are NOT supposed to be included in the calculation for the Bid Bond.

The Performance Bond is based on the sum of items: (1) Basic contract services, and, (2) Professional Services. Total only items 1 and 2 for the Performance Bond.

3. How many crews and maintenance technicians are working each day to handle the workload.

Distribution Systems has 175 crews including the dispatch staff.

**Monday thru Thursday - 5 crews (15 employees) + supervisor (West)
Wednesday thru Saturday - 4 crews (14 employees) + supervisor (West)
Sunday thru Wednesday - 5 crews (15 employees) + supervisor (West)
Monday thru Friday (nights) - 3 crews (9 employees) + supervisor (West)**

**Sunday thru Wednesday - 5 crews (15 employees) + supervisor (East)
Tuesday thru Friday - 5 crews (14 employees) + supervisor (East)
Wednesday thru Saturday - 4 crews (14 employees) + supervisor (East)**

**Meter Shop has 24 employees with 2 supervisors
Welding Shop/Small Engine Repair/Meter Repair Shop has 7 employees with 1 supervisor
Preventive Maintenance has 8 employees with 1 supervisor
Support has 5 emergency men/4 Leak Detection personnel + 1 supervisor
Dispatch has 10 employees with 1 supervisor**

4. What shifts do they work? What Time and Attendance System is in place if any?

7:00 am to 5:30 pm shift, with staff working:

**Monday through Thursday
Wednesday through Saturday
Sunday through Wednesday
Tuesday through Friday**

4:30 pm to 1:00 pm shift, with staff working:

Monday through Friday



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 4 of 74

Specific crews and the emergency men have been identified as twenty-four hour crews. The emergency men work eight-hour shift, which change daily at 8:00 am, 4:00 pm and Midnight.

Dispatch crews work a combination of twelve-hour and eight-hour shifts. Shift changes at 8:00 am, noon, and midnight.

All of the above mentioned employees have to clock in/out each workday.

Time off for sick/vacation/etc., requires they fill out a leave slip, which is processed by clerical staff tracking their time.

5. Do you want the maintenance system to feed labor information to the time and attendance system? Is this system the GEAC H/R system?

The Public Works Department does not have an automated time and attendance system. The GEAC H/R system is a separate payroll system. Distribution Systems has no plans to exchange labor information with a time and attendance system. However, if your system does support data exchange with a time and attendance package, please state it in your bid response.

6. How many actual PM, Inspection, Emergency, Capital Project Work Orders does COT actually process each month, and for the year.

Distribution Systems did approximately 15,000 emergency calls from 01/01/01 to 12/31/01 in the current Work Order system.

Preventative Maintenance did approximately 129 PM Work Orders per month or 1540 from 01/01/01 to 12/31/01 in the current Work Order system.

The current system does not provide a tracking method for inspections.

Capital project work is kept in an Access database by the Engineering division. Distribution Systems is not currently tracking this information.

7. Please describe the billing functionality and interface requirements to your customer Billing System.

Billing is accomplished through the GEAC Financials-Purchasing module. Each system is maintained separately and both, the Work Order Management System and the GEAC - Financials system has mutual and exclusive data entered into each.

Please remove the word Interface from this section and replace it with integration.

Integration requirements have not been defined and is not a priority for phase one, two or three of this project. Data Conversion and integration will be analyzed in phase two. It is mentioned in the RFB to allow for analysis when it is addressed in the future.

8. Please provide information on the current maintenance management system.

a. Vendor Name – DSI

b. Current Technology Platform and Database? DEC VAX – ISAM files.

c. Current number of Assets Maintained, Locations, Inventory Items.

Current assets maintained



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 5 of 74

Data	CONTENTS	Approximate Number of Records
UMS/SOMS Valve & Hydrant	Atlas Pg, Loc, Make, Description	Valves = 39,073 Hydrants = 15,195
Custima/Affinity – Meter records	SN, Make, Address, Date installed	Meter Cans = 160,315 Meter Inventory = 272,536

The location of the assets is recorded on atlas pages. Some of the information is kept in a separate Engineering GIS system.

Public Works maintains five (5) warehouses with three to five hundred bin locations per warehouse. The inventory count is referenced in question SC03. Currently we have at least 3000 total stock items and over 300,000 individual pieces.

9. Integration - To better understand and bid on the integration requirements we need the following information.

a. What hardware platform are these applications running on, what database is currently being used, and what are the counts for assets being maintained, number of maintenance employees, inventory items, vendors, fixed assets, etc. that are being maintained in these systems?

In Section 1 – RFB Questionnaire, Question #26, the purpose of this question is to gain an understanding of interface experience. If none for the following applications is applicable then respond with no interface has been developed for that system. You may note examples of other systems you have developed or provided interfaces.

Question #26 reads, “ Describe the company’s business relationship (partnership) and also experiences developing interfaces for systems similar to the City of Tulsa’s. List all interfaces developed and describe the nature of the interface for the following: Geac human resources package (Tier 1), Geac financials (Tier 1), Geac fixed asset accounting system (Tier 1), DST Innovis Custima/Affinity – customer information and billing package (Tier 1), Hansen permits, licensing and customer service (Tier 2), NBSI message switch (Tier 3), GPS (Tier 4), GIS (Tier 4), Novell GroupWise, MS Exchange email (Tier 4), Oracle (Tier 1)”

Included are answers for the following:

GEAC H/R? IBM Mainframe, VSE Operating System

What GIS System ESRI? Public Works engineering division uses Bentley’s Micro Station, Geomedia from Intergraph Corporation and Intergraph's SelectCAD for civil engineering design projects. Distribution Systems does not own the GIS system and cannot make management decisions regarding the GIS standards, schedules, or access. The Distribution Systems section is merely a user of the system and must be granted permission by the Engineering section.

GEAC Financials - Does this include General Ledger, Accounts Payable, Purchasing, and Inventory? IBM Mainframe, VSE Operating System. It includes GL, AP, Purchasing and Requisitions.

GEAC Fixed Asset Accounting? Same as GEAC Financials.

DST Innovis Custima/Affinity Billing System? Alpha 4100, True Unix 5.1, Oracle 7.234 (upgrade to 8.i within the next 6 months)

Hansen Permits? ES40, TrueUnix 64 5.1, Oracle 8.i



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 6 of 74

GPS – None available

GIS - Whose software - ESRI? – Public Works Engineering division utilizes Sun MicroStation, Geomedia from Intergraph Corporation. They also use Intergraph's SelectCAD for civil engineering design projects.

Oracle - Is this COT's database standard moving forward or what's already in place? We are moving forward to Oracle 8.i

10. What CMMS vendor applications has COT reviewed or been given demonstrations of up to this point?

During the discovery phase of the project over 100 cities were surveyed and twenty (20) plus vendors were called. Nine (9) different vendors gave product demonstrations. Vendor demonstrations were concluded in June 2001 when the project teams awareness of applications and packages available had been established.

11. On page 64, in paragraph 3 on line 3, you state ' . And interface, and conversion services in phase II.' Then in paragraph 4 on the same page, the bullet items, I. e. (Data Conversion) and I. h (Systems Integration) are listed.

These two referenced items seem to contradict the earlier paragraph. Would you please let me know what phase you would like the Interfaces and Data Conversion to be included in for the project plan.

Distribution Systems realizes it does not want an interface. The word “interface” should be removed from this area.

Data conversion and integration will be needed in Phase II and beyond. Since we are unsure of our needs to date please quote an hourly rate based on an estimated number of hours.

12. We were wondering if we needed to issue a new Bid Bond for this or if the City can just hold onto the first one we sent?

If a supplier responded to our first request, the City Clerk will return the bid bonds. This rebid requires submitting a bid bond with your bid response.

13. Notice on the table of contents page the new requirement to sign and notarize the Interest Affidavit and the Bidders Affidavit.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 8 of 74

**BIDDER AFFIDAVIT - TITLE 74 O.S. (1974 SUPP.)
85.22-85.25**

STATE OF _____ COUNTY OF _____

_____, of lawful age, being first duly sworn on oath says

Authorized Agent

1. (s)he is the duly authorized agent of _____, the bidder submitting the **COMPETITIVE** bid which is attached to this statement, for the purpose of certifying the facts pertaining to the existence of collusion among bidders and between bidders and municipal officials or employees, as well as facts pertaining to the giving or offering of things of value to government personnel in return for special consideration in the letting of any contract pursuant to the bid to which this statement is attached.
2. (s)he is fully aware of the facts and circumstances surrounding the making of the bid to which this statement is attached and has been personally and directly involved in the proceedings leading to the submission of such bid; and
3. neither the bidder nor anyone subject to the bidder's direction or control has been a party;
 - a. to any collusion among bidders in restraint of freedom of competition by agreement to bid at a fixed price or to refrain from bidding,
 - b. to any collusion with any municipal official or employee as to quantity, quality or price in the prospective contract, or as to any other terms of such prospective contract, nor
 - c. in any discussions between bidders and any municipal official concerning exchange of money or other thing of value for special consideration in the letting of a contract.

SIGNATURE OF AUTHORIZED AGENT

Subscribed and sworn to before me this _____ day of _____, 20____.

Signature of Notary Public

MY COMMISSION EXPIRES

**The Bidder Affidavit must be completed, signed by
an authorized agent, and notarized.**



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 9 of 74

Contractor/Bidder Information Sheet

**To be completed by all respondents to
Invitations for Sealed Bids or Proposals**

(Print or type)

Project No:		
Description:		
Taxpayer Identification No:		
Legal Identity: <small>Corporation, Partnership, Individual, etc.</small>		
Full Name of Bidder:		
Street:		
City/State/Zip:		
Project Manager		Legal Contact
Name:		Name:
Street:		Street:
City/State/Zip:		City/State/Zip:
E-Mail:		E-Mail:
Phone:		Phone:
Fax:		Fax:
Alternate Contact:		Alternate Contact:
Name:		Name:
E-Mail:		E-Mail:
Phone:		Phone:
Fax:		Fax:
Website Address:		
Would you like to receive information to register as a potential supplier to the City of Tulsa for other projects?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If yes, Fax copy to: Phyllis Brown 918-699-3225		



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 10 of 74

GENERAL TERMS AND CONDITIONS

Definitions:

ABJ – Acronym for the AB Jewell water treatment plant.

API – Application Programming Interface.

Account Code – A grouping of account information, which normally includes the funding source (fund such as Water, Sewer, Storm water, etc.), account; a specific account number such as meters, pipe and fittings, tools, etc., and center number (Identifier of the section involved such as Water Distribution, Meter Shop, etc.).

Sample: 7020-5242101-040644

Account Number – A number associated with and used in conjunction or in place of an account title.

Sample: 5242201 - Capital Meters

Activity Code – A unique code used to define a specific task or activity assigned to a service request or a work order. See: Work Code.

Sample: (CB) Check break, (CBM) check burst meter

Application Interface – A link between two computer systems. A uniquely written program that allows the acceptance and updating of one or both applications accomplishes the interface.

ASCII – American Standard Code for Information Interchange.

Asset – A physical item such as a sign, meter, line segment, valve, water component that provides value to the community and must be maintained at a functional level.

Asset Group – A group of assets identified by a unique name or number.

Audit Trail – A record showing who has accessed a computer system and what operations he/she has performed, including the transaction, during a given period of time. Audit trails are useful both for maintaining security and for recovering lost transactions. Most accounting systems and database management systems include an audit trail component.

Bidder - Is a supplier that submits a bid for consideration by the City in accordance with this RFB.

Blanket Purchase Order – A purchase order for (1) lot of miscellaneous materials or supplies, the total of which is not to exceed the total dollar value of the purchase order. Note: Supplies to be purchased against a blanket purchase order are determined on an ongoing basis until a determination is made to close the order to further purchases.

BLOB – Binary Large Object.

CDPD – Cellular Digital Packet Data.

Change Order – Request for additional work within the general scope of these specifications not requested within bid request. See additional information in body of bid specifications

Citrix – An application serving and portal software and services company that provide personalized access to any application or information source - whether Windows®, UNIX® or Web-based - through any device, over any connection.

City – City of Tulsa.

CMMS – Computerized Maintenance Management System.

Comma Delimited Format – A file format in which each piece of data is separated by a comma. This is a popular format for transferring data from one application to another, because most database systems are able to import and export comma-delimited data.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 11 of 74

Contract Number – A unique number assigned to a document used for the purposes of identifying a complete project. The contract can comprise multiple work/service order numbers and activity codes.

Contractor– A Bidder that has been selected by the City to provide specific design, supply and/or installation services. Same as successful bidder.

Cost – The price or cost to the city will be the lower of the price quoted in the bid, current published price, or published sale price. The word cost and price are equal in meaning.

COP – (Change Out Program) a process designed to install new meters in place of old ones.

COT – City of Tulsa, a local branch of government that changed from a Mayor/Commissioner government to a Mayor-Council government in 1990.

CRIMP – A process designed to eliminate an illegal or unauthorized service connection.

Critical Success Factor – (CSF) The essential issues without which a project stands little chance of success. They include the use of proven strategies for design or performance guarantees; those few key areas of activity in which favorable results are absolutely necessary for a team to reach the project goals.

Custima/Affinity – Customer Information System, water, wastewater, and refuse billing system. (DST Innovis Custima/Affinity™) www.dstinnovis.com.

Customer Service Module – Call tracking of internal and external customer requests. Management of complaints, requests for service, dispatches inspections, and emergencies through the creation of service requests and work orders by address, type and district from inception to completion.

Data Entry – The process of entering information into a computer system via a data terminal or terminal emulation. Physically entering hard copy data by keyboard, scanner, or other methods into user-defined program fields.

Deliverable – Something that will be produced during the project; also, a project outcome. A concrete or tangible product identified as an element in the work break down structure (WBS).

DELMS – Dead End Line Maintenance System. A system, which tracks flushing of dead-end, water lines.

Department– Means the department shown on the cover sheet.

Desirable – The terms "can", "may", "should", "preferably", or "prefers" identifies a desirable or discretionary item or factor.

District – An alpha abbreviation assigned to a service/maintenance group to which a work order is issued. For example a work order issued to "O" district means that task has been assign to the "Operations" group. "E" district is East side mainline maintenance. "W" is West side maintenance. "M" is Meter maintenance. Etc.

DS – Distribution Systems section within the Public Works Department, A.K.A. Water Distribution.

DOC – Document/Documentation file extension; Microsoft Word File (file) extension.

ESRI – Environmental Systems Research Institute (Company located in Redlands, CA).

Fax-on-Demand – 918-596-1171 (to obtain index of documents).

Form – A preprinted document sometimes in carbon form, representing the results of an electronic or manual transaction.

F&P – Finance and Planning section within the Public Works Department.

GASB 34 – Governmental Accounting Standards Board Statement 34. The governing body that sets generally accepted reporting and accounting rules for public agencies.

Geac – Geac Computer Corporation Limited is a provider of mission-critical software and systems solutions, which include business applications for financial administration and human resources functions, and enterprise resource planning applications for manufacturing, distribution and local government administration as well as supply chain management.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 12 of 74

GIF – Graphic Interchange Format.

GIS – An acronym for Geographic Information Systems; a computer hardware and software application that captures, stores, manages, manipulates, analyzes and displays digital representations of geographic features (spatial images) and descriptive information databases that supports the images.

GPS – Global Positioning System.

Implementation – The setup and integration of the new system platform, vendor application and services into the existing system after successful completion of the testing phase.

Inquiry – The act of inquiring. A question or query. A search for information.

Installation – The physical setup of hardware, peripherals, and workstations. Proper initialization and installation of the server operating system, database application(s) and any software component(s) the system may require. Followed by thorough quality assurance unit testing for optimum functionality.

Interface – The link between a user and a computer program. An interface is a set of commands or menus through which a user communicates with a program. A command interface requires the use of commands to access the interface and a menu interface requires the use of menu options, in order to access the interface.

Invoicing Module – A software module which provides the ability to enter and process invoice detail to update purchase order and inventory records to reflect the actual amount paid for materials and supplies.

Job Costing Module – Materials, supplies, labor, work activity, and equipment costs applied to a job or a work order based on actual replacement costs.

Letter – A preprinted correspondence containing customary language that is generated on an ad hoc or recurring basis.

LT – (Labor Trade) - The human resources designation for Labor Trades employee classification.

Line Segment – A section of pipe between two intersecting branches; also a section located between the two nearest shut-off valves; it could terminate where the pipe transitions to a different diameter or a different material, i.e. cast iron changing to concrete, etc.

Mandatory – Such terms as "must", "shall", "will", "is required", or "are required", identify a mandatory item or factor. Failure to meet a mandatory item or factor may result in the rejection of the bidder's bid.

Major Failure – Any loss resulting in the unavailability of software, database structures, data, files, indices, hardware or any primary or ancillary application components causing system downtime or leads to a breach in the Service Level Agreement and prevents the City from conducting its business for more than two to four hours.

Major Software Modification – Changes at the system, database structure, module, or unit level requiring structured analysis and development/enhancement efforts exceeding four man-hours.

Milestones – Significant project events that indicate a specific point of time in a project.

MIPS – Million Instructions Per Second.

MWCS II – Motorola Wireless Communication Services, Version II. Used to communicate over radio frequencies.

NBSI – New Beginnings Solutions, Inc., a message switch vendor for public safety wireless applications.
<http://www.nbsinews.com/>.

Node – An asset which is either the beginning point, end point or between two points of reference.

ODBC – Open Data Base Connectivity.

OLE – Object Linking and Embedding.

OKIE One Call (Utility Locate) – Organization in Oklahoma that assists with locating underground utility lines.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 13 of 74

OT – (Office Technical) – human resources designation for Office Technical employee classification.

Preventive Maintenance Module – Routine scheduling of work triggered by date or activity, which generates a work order.

Price – See Cost definition above.

Progress – A software company that provides application development, deployment, and management products and services focused on transaction-oriented applications for the Internet and other computing platforms.

Project Group – A unique name or number assigned to track a group of projects.

Project Number – A unique number assigned to keep track of a work order. A project number may comprise one or more work order numbers.

PSO – Public Service of Oklahoma.

Purchase Order Number – A unique number assigned to a City purchase order for identification, processing and reporting purposes.

Purchasing Module – The ability to track inventory purchase processes including the generation a requisition for materials (parts and supplies), the creation of a purchase order, and receiving of materials against that purchase order.

Purchasing Office – City of Tulsa; 200 Civic Center, Room 802; Tulsa, Oklahoma 74103.

PWD – The City of Tulsa Department of Public Works.

Query – A question; an inquiry; to ask, to seek.

RDLAP – Proprietary wireless protocol used by Motorola.

R & I – (Remove and Install) The process of removing a meter and/or installing another meter.

Report descriptions from Appendix C:

- Customer Inquiry - **Customer call summary report detailing jobs and work.**
- Water Outage - **Report by line size and hours water was off.**
- Water Operations - **Varying reports detailing labor, job costing, equipment usage, etc.**
- Monthly DELMS – **Flushing information on Dead End Lines.**
- Check Reservoir Lights – **Residuals, lights, etc. which are checked and reported weekly.**
- Chlorine Tank – **Report on level, residuals, PH, & other chemical checks.**
- Requisition Register: Report showing detail of requisitions in the system for parts inventory materials and supplies. Useful in keeping track of what materials and supplies have been requisitioned as well as which requisition lines have been made into purchase orders and which are pending or have been cancelled.
- Vendor Directory Report – **Listing of vendors and vendor numbers used to make purchases and tie vendors to requisitions and purchase orders.**
- Count Scheduling – **Report listing used to maintain a record of when physical counts of material and supply items have been performed.**
- Multiple Warehouse Comparison – **Report containing detail on material and supply items for selected series of warehouses. Provides a useful view of where inventory parts and supply are within the warehouses.**
- Accounting Reconciliation Material Usage Summary – **Report showing the quantity and dollar balance for materials and supplies at the start of the month, the transactions on the item during the month, and the quantity and dollar balance at the end of the month.**

Requisition Number – A unique number assigned to a City requisition (Request for Purchase) for identification, processing and reporting purposes.

Resource – Designated staff that provides expertise in a specified area or field.

SCADA – Supervisory Control and Data Acquisition.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 14 of 74

SDLC – Software Development Life Cycle.

Seller – Same as successful bidder.

Service Address – The address where service is performed; the physical location of the service line and/or meter.

Service Order Number – A task created in SOMS with a six-digit number assigned for tracking purposes.

Service Request Module – Tracks requests for work without a work order assignment.

SOMS – (Service Order Management System) this system (UMS) is part of the Response System and was developed for the Water Distribution section of The City of Tulsa.

Successful Bidder – The bidder who receives the award and enters into a contract or accepts a purchase order for the goods and services specified herein.

SWO – (Scheduled Work Order) the process of scheduling work that is assigned based on calls received from internal and external customers. Work orders have either a service order number or work order number assigned for tracking purposes.

System Administration & Security Module – Application management and security internal to the application.

T&C - Terms and Conditions.

Table – Columns define a table, and each column is given a name. Data is then stored as rows in the table. Tables can be related to each other and the database can be used to enforce these relationships.

Task – An individual assignment that is part of a work/service order. The completion of a work order can involve one or more tasks.

Task Code – See activity code.

TFD – Tulsa Fire Department.

The System – Refers to the bidders proposed software.

TIF – Tagged Image File.

TPD – Tulsa Police Department.

TUMS – Tulsa Utility Maintenance System.

Turnkey – Refers to a system including software and services that has been built, installed or supplied by the manufacturer complete and ready to operate. In the computer industry, the term is used to promote a system that can be easily set up and operated "right out of the box." The COT will accept an 85% turnkey system with 15% operations defined business processes, business rules and work flow procedures.

UMS/SOMS – Utilities Management System/Service Order Management System (work orders) originally designed in 1981 as a general ledger system for electric utility and railroad companies. Customized for Tulsa's DS section.

User Tools & Utility Modules – Application productivity and reporting tools for use by a non-technical user of the system.

UWO – (Unscheduled Work Order) Work orders executed on an emergency basis. May turn into a scheduled work order based on the findings of the operations customer service representative responding to the unscheduled service call.

Warehouse/Inventory Module – Materials, supplies, parts usage, stock level activity, cataloging, ordering, repair, vendor information, and reporting capabilities.

Water Module – The installation, repair, monitoring (condition assessment) and reporting of pipes, mains, hydrants, meters, services, valves and fittings associated with a work order, customer, or address.

WBS – (Work Breakdown Structure) A project management tool for defining the project deliverables and accomplishments.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 15 of 74

Website – www.cityoftulsapurchasing.org.

Work Code – See activity code.

Work Order – An authorized task issued to a service/maintenance group and assigned to Public Works personnel.

Work Order Module – Produces, tracks and reports scheduled and unscheduled work orders. Includes detailed job description, schedule, resource usage, activities, and dates. Tracks activities performed on structures affected by work. Also manages active works assignments, including labor charges, time and equipment.

Work Order Number – An assigned work request number. In Custima/Affinity a work order number is 6 digits in length.

Specification Color and Special Effects:

Based on printer type page numbers may vary by one to two pages. Also, for those viewing this specification on the Internet or printing on a color printer, there may be color or special effects used to highlight an item as needed.

Purchasing Authority:

The authority used to issue this Invitation for Sealed Bid comes from:

- a.) City Charter Article XII Section 14
- b.) City ordinance Title 6, Chapter 4 (Purchasing)

Fairness:

It is the intent of the City to present these bid specifications such that they will result in an open and competitive process. If in your opinion, we have not met that objective, please contact the project buyer in writing.

Bidder Conflict of Interest:

City employees will not be permitted to bid on this contract or work for the awarded Contractor(s) on this contract. By submission of a bid, bidder certifies that no employees of theirs, any affiliate or subcontractor has bribed or lobbied, or attempted to bribe or lobby an officer or employee of the City.

Specification Availability:

These specifications can be obtained in the following ways:

- Website: www.cityoftulsapurchasing.org
- Fax-on-Demand: 918-596-1171 for an index
- Purchasing Office: 200 Civic Center Room 802; Tulsa, Oklahoma 74103

Acknowledgement of Intent to Bid:

The only way to acknowledge your intent to bid is by emailing the project buyer as directed on page 1. Sending any addenda to you will be based on knowing you are a bidder.

Bid Form:

BIDS MUST BE SUBMITTED ON THIS FORM ONLY INCLUDING A SIGNATURE OF AN AUTHORIZED AGENT. DO NOT ALTER THE SEQUENCE OF THIS FORM. If submitting multiple bids, submit each in a separate envelope or box. Be sure the envelope or box is completely and properly identified and sealed, showing the bid number and opening date in the lower left hand corner.

Bid Format

The Bidder shall submit the bid in MS Word 2000 format with questions and answers in the same order as requested. Each question is uniquely identified and the Bidder will respond by adding an answer line immediately below the given question. The bid shall be submitted in two binders. The first binder is the Technical Bid. The second binder includes the completed Cost Bid. Supporting literature may be included in a separate 3-ring binder or submitted in a separate section at the back of the Technical



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 16 of 74

Bid. Sales literature may also be included but must be submitted in a separate 3-ring binder.

Technical Bid Format

Bidders shall provide the information required by this section as a separate Technical Bid.

Submit one (1) original, plus nine (9) copies of the Technical Bid in separate binders, or folders distinctly marked, as "Technical Bid" in a 3-ring binder. No standard sales literature should be included in this section. If the Bidder chooses to include sales literature, it should be included in a separate 3-ring binder.

Each section of the Technical Bid shall be organized to facilitate the review and evaluation process with each section of the bid in the same order as the information is requested. The Technical Bid includes the RFB cover sheet and all pages up to the Technical Specifications page, Section 1 – System Needs Questionnaire, Section 2 – System Implementation, Acceptance and Support, Appendix B, Appendix C, Appendix E, and Appendix F.

If the Bidder takes exception to any requirements provided herein, indicate the exception with a separate comment.

Bidders may also, at their discretion, choose to provide additional information that they feel may be of use to the City of Tulsa by inserting a comment.

The bidder shall provide a complete and thorough description of how effectively the proposed CMMS can meet the requirements of the section, including, but not limited to, specific features of the proposed system to achieve the requirements.

The City of Tulsa will evaluate competing bids based upon the City of Tulsa's assessment and substantiation of specific claims. The City of Tulsa's evaluation will include consultation with references, review of Bidder's claims, and review of any and all other information available to the City of Tulsa.

If the City of Tulsa is unable to verify claims for any reference installations, or if submitted documentation does not contain sufficient information for the City of Tulsa, the Bidder's reference will be void.

Cost Bid Format

Total Cost: Submit one (1) original, plus nine (9) copies of Appendix A - Detailed Cost Summary, in separate binders, or folders distinctly marked as "Cost Bid – Detailed Cost Summary". Bidders must use the form provided in the Detailed Cost Summary. The Cost Bid includes Appendix A and Appendix G.

All Costs: All costs to be incurred and billed to the City of Tulsa should be described by the Bidder for each item, to allow for a clear evaluation and comparison, relative to other offers received. The Bidder should understand that the City of Tulsa will only pay amounts included; liability for items not included remains with the Bidder, and that the proposed price quoted must include all costs the Bidder wishes to have included in the transaction.

Vendor Demonstrations

The City reserves the right to call the vendor back for an additional system demonstration before making a final decision. The COT reserves the right to videotape each demonstration and the contents will become part of the contract.

Statement of Quality Assurance and Quality Control

The bidder organization must recognize and practice formal methods of quality assurance and quality control in producing, providing and servicing the system.

The bidder must provide documented evidence of quality assurance and quality control procedures, including factory testing and individual component quality checks.

RFB Ambiguity, Omission, Inconsistency, or Error:

Any Bidder believing that there is any ambiguity, omission, inconsistency or error in the RFB should promptly notify the City in writing of such apparent discrepancy. Failure to notify will constitute a waiver of claim of ambiguity, consistency or error.

If a bidder discovers any ambiguity, conflict, discrepancy, omission, or other error in this Invitation for Sealed Bid, they



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 17 of 74

shall immediately notify the City contact of such error in writing and request modification or clarification of the document. If needed, an addendum will be issued to all known bidders without divulging the source for the request of the same.

If a bidder fails to notify the City prior to the date and time fixed for submission of bids of an error or ambiguity in the RFB known to them, or an error or ambiguity that reasonably should have been known to them, they shall not be entitled to compensation or time by reason of the error/ambiguity of its late resolution.

The apparent silence of this specification as to any detail or apparent omission of a detailed description concerning any point shall be regarded as meaning that the best commercial practice is to be used. All interpretations of the specification shall be made from this statement. Proof of compliance shall be the responsibility of the contractor.

Bidder Questions:

All questions will be handled as stated on the first page. Any discussions with anyone other than the Project Buyer or other procurement personnel may disqualify your bid and be grounds for retracting an award recommendation or be cause for the termination of any future contract or purchase order.

If there has been a breach of this General T&C and products have been delivered, they will be returned at the successful bidders cost. The City will not be liable for any supplier costs. A list of all procurement personnel is available on the City of Tulsa's website and Fax-on-Demand.

The City cannot guarantee that any questions received within ten (10) working days of the due date will be answered.

Any oral explanations or instructions given before the award of the contract will not be binding.

Any information given one bidder concerning this Invitation will be provided promptly to all other known bidders as an addendum, if that information is necessary in submitting a bid or if the lack of it would be prejudicial to other bidders. The City may at its option periodically send an e-mail containing any questions and answers not previously distributed by an addendum prior to it being included in an addendum.

Addendum to Invitation for Sealed Bid:

- a.) All addendum information will be communicated to all known respondents in writing. Any verbal communications by any City personnel or their agent will not be a part of these bid specifications.
- b.) If this specification is amended, then all unchanged provisions, which are not modified, remain unchanged.

Preparation Cost:

The City of Tulsa will not be responsible for any bidder costs in preparing the bid response, pre-bid conference, demo, or any other cost incurred by the bidder.

Multiple Responses:

Bidders may submit more than one bid in response to this RFB. However, each bid must be a separate, complete package, which can be considered independently of any other bids from the same Bidder.

Bid due:

Deliver or hand carry offers to the office of the City Clerk City of Tulsa; 200 Civic Center, Room 109; Tulsa, Oklahoma 74103 **NO LATER THAN 5:00 PM** on the due date shown on the cover sheet. Offers will be date/time stamped in accordance with this provision.

The City shall not be responsible for the failure of offers not reaching the City Clerks office prior to the due date.

Faxing Bids:

Bids cannot be faxed to the City Clerk, Purchasing, or any other City office or employee.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 18 of 74

Bid Opening:

All bid openings are public. The opening will take place the day after due:



Francis Campbell Council Meeting Room

City Hall, 200 Civic Center, plaza level

Each Thursday

8:30 A.M.

Exceptions Taken to Specifications:

Any exceptions or deviations from these written specifications shall be shown in writing on the "List of all Exceptions taken to these specifications" Appendix. Note that an exception may eliminate you from consideration.

Altering Bids:

Bids cannot be altered or amended after the submission deadline. The signer of the bid thus guaranteeing authenticity must initial any interlineations, alteration, or erasure made to the bid before the opening bid date. Bids must be submitted in ink or type written. Bids using pencil will not be accepted.

Bid Conformity:

By submitting a response to this Invitation, the bidder attests that the supplies and/or services conform to these specifications unless an exception is listed.

Evaluation Committee:

The evaluation committee will consist of personnel selected from the operating and technical areas as needed. The Purchasing Division will assist with purchasing procurement issues.

Award of Bid:

The bid will be awarded to the firm(s) whose bid is responsive and most advantageous to the City, considering the factors identified in the bid and the Purchasing Ordinance set forth below:

Award of Contract, City of Tulsa Ordinance, Title 6, TRO Chapter 4, Section 406E:

1. Authority of the Mayor. The Mayor shall have the authority to award contracts within the purview of this chapter.
2. Lowest Secure Bidder. Contracts shall be awarded to the lowest secure Bidder meeting specifications. Bid specifications may include a point system for evaluating the lowest secure bid. In determining the "lowest secure bidder" in addition to price the following factors shall be considered:
 - a. the ability, capacity and skill of the bidder (proposer) to perform the contract or provide the service required;
 - b. whether the bidder (proposer) can perform the contract or provide the service promptly or within the time specified, without delay or interference;
 - c. the character, integrity, reputation, judgment, experience and efficiency of the bidder (proposer);
 - d. the quality of performance of previous contracts or services;
 - e. the previous and existing compliance by the bidder (proposer) with laws and ordinances relating to the contract or service;
 - f. the sufficiency of the financial resources and ability of the bidder (proposer) to perform the contract or provide the service;
 - g. the quality, availability and adaptability of the supplies or contractual services to the particular use required;
 - h. the ability of the bidder (proposer) to provide future maintenance and service for the use of the subject of the contract;
 - i. where an earlier delivery date would be of great benefit to the requisitioning agency, the date and terms of delivery may be considered in the bid award;
 - j. the number and scope of conditions attached to the bid; and



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 19 of 74

- k. if a point system has been utilized in the bid specifications, the number of points earned by the bidder (proposer).

The bid will be awarded based on a scoring percentage and cost per point ratio.

Award of Items to Bidder(s):

The City may award each item to different bidders or all items to a single bidder at its sole discretion unless otherwise defined on the detail cost summary page or described in the Special Terms and Conditions section.

Technicalities: The City may waive any minor technicalities in the bidding process at its sole discretion.

Right to Reject:

The City of Tulsa reserves the right to reject any and all bids, or may accept or reject any line item at the price quoted. In addition, the bidder should recognize the right of the City to reject a bid if the bidder fails to submit the data required in the bid document, or if the bid is in any way incomplete, or irregular, or is not in total compliance with the specifications. Any departure from the specifications shall be stated in the bid with an explanation of the reason for the change.

Bid Results Notice:

Available in the following ways:

- City of Tulsa Purchasing Website
- City of Tulsa Fax-on-Demand
- City Clerks office at City Hall

Notice of Award:

The project buyer will notify the successful bidder.

Equal Employment Opportunity:

Each bidder agrees to comply with the terms of Title 5, Chapter 1, of Tulsa, Oklahoma Charter and revised ordinances relating to equal employment opportunity.

Employment Discrimination Prohibited by Contractor:

During the performance of this contract, the contractor agrees as follows:

1. The contractor will not discriminate against any employee or applicant for employment because of race religion, color, sex or national origin, except where religion, sex or national origin is a bona fide occupational qualification, reasonably necessary to the normal operation of the contractor. Or agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
2. The contractor, in all solicitations or advertisements for employment placed by or on behalf of the contractor, will state that such contractor is an Equal Employment Opportunity Employer.
3. Notices, advertisements and solicitations placed in accordance with Federal Law, rule, or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.

The contractor will include the provision of the foregoing paragraphs of this section in every subcontract or purchase order of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor.

Americans with Disabilities Act:

The Contractor shall take the necessary actions to ensure its facilities and employment practices are in compliance with the requirements of the Americans with Disabilities Act. Any costs of such compliance with the requirements will be the responsibility of the contractor.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 20 of 74

Delivery Time Frame:

Contractor must keep the City of Tulsa Purchasing Department advised of order status. Default in promised delivery or failure to meet specifications authorizes the Purchasing Agent to purchase materials and services elsewhere and charge full increase of cost and handling to defaulting contractor. Consistent failure to meet back-to-back deliverables or deliverables within the agreed upon timeline, i.e., installation and testing of software, etc., without valid reason may be cause for removal from the bid list. Scheduling of deliverables will be determined and agreed upon by the City of Tulsa and successful bidder.

Description of offering and warranty:

The bidder shall attach the manufacturer's name of the equipment or material to be furnished, type, model numbers, manufacturer's descriptive bulletins and specifications. All guarantees and warranties should be clearly stated. This data shall be in sufficient detail to describe accurately the equipment or material to be furnished. Manufacturer's specifications, in respect to the successful bidder, shall be considered as part of the contract with the City of Tulsa.

Mandatory Requirements:

The bidder must comply with all mandatory requirements. Exceptions:
The City will consider an alternate response to a mandatory requirement. The City at its option may consider and approve an alternate if it fulfills the needs of the City.

Travel Expenses:

The response shall include a "Not to Exceed" amount for all expenses necessary to fulfill these specifications. No reimbursement will be made for expenses not actually incurred. The City reserves the right to audit all travel expenses.

Industry Standards:

Any applicable industry standard and codes will be adhered too whether specifically listed or not.

Product Substitutions:

The parties recognize that technology may change during the term specified in this bid request or the term of any subsequent purchase order or contract. Therefore, the City may at its option accept changes to the specifications for products of equal or better capabilities at no additional cost to the City. The Contractor(s) shall give the City thirty (30) working days advance notice in writing of any changes to the original Bid specifications. The City reserves the right to accept or decline the specification changes and will indicate the decision in writing to the Contractor(s).

Right to Audit:

Contractor fully understands that it is a condition of this bid to allow the City to audit for goods, services, materials, and/or supplies provided to the City of Tulsa. Contractor agrees to provide timely access to its books and records on Contractor's premises upon reasonable request by City staff. Contractor further agrees that it shall provide City personnel reasonable access and such clerical assistance as City staff may require for examination and audit of those portions of Contractor's books and records relating to the goods, services, materials and/or supplies furnished to the City during the term of any contract between Contractor and City. The contractor further agrees that any discrepancies found will be corrected and will return funds to the City for undelivered goods or services or overcharges. The supplier will have fourteen (14) days to refund any monies due. Depending on the magnitude of the problem, the contract may be terminated.

Authorized Reseller:

The bidder certifies to have been an authorized reseller of the products and/or services bid for at least 180 days prior to bid due date. If not requested as a part of these specifications, the bidder will have seven (7) working days to produce sufficient proof from the manufacturer certifying the reseller status and beginning date.

Oral Agreements:

None apply

Recipient of Contract:



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 21 of 74

The City will only contract with the "Firm name" shown on the first page and, only, if signed and notarized by an authorized agent of that firm.

Contract Assignment:

Successful Bidders(s) shall not sell, sublet, or assign the agreement or any portion thereof to any person or persons, except with the written approval of the City of Tulsa.

Litigation of Conflicts:

Any dispute requiring litigation will only take place in the courts of Oklahoma in the County of Tulsa.

Law Applicable:

Bidder warrants that the goods and/ or services bid will be produced and sold in compliance with the provisions of any and all Federal, State, and Municipal laws and ordinances.

Order of Document Precedence:

This document will be made a part, either implied or specifically, of any future contract or purchase order. Nothing submitted in the bidder's documents or future contracts or other correspondence will replace any specifications, terms and conditions herein.

Bidder's response, including all promises, warranties, commitments and representations made in the successful bid, shall be binding and incorporated by reference in the City's contract or purchase order with the successful bidder. Therefore, all responses including all statements, claims, declarations, and specifications in the bids shall be considered firm and irrevocable, and all prices considered maximum, for purposes of bid evaluation, future purchase order, or future contract stipulations unless specifically waived in writing by the City.

Treatment of Information:

All information received or obtained from bidders in connection with this RFB must be treated as confidential and not used for announcement of your receiving this bid or possible award of bid is not permitted without the written permission of the City contact person named herein.

All bid information received from bidders by the City of Tulsa, in connection with this RFB, will be retained by the City and remain as a matter of public record. Any proprietary or confidential information should be identified as such, and the desired treatment of the information specified.

Bids will be disqualified if information relevant to the evaluation process cannot be retained for possible disclosure based on established Open Records Law.

Liens:

The contractor agrees to indemnify and hold the City harmless from all claims, demands, causes of action or suits of whatever nature arising out of the services, labor, and materials furnished by the contractor or his/her subcontractors under the scope of this bid and from all laborer's, materialmen's and mechanic's liens upon the real property of the City of Tulsa.

Hold Harmless:

Bidder agrees to defend and save City of Tulsa from and against all demands, claims, suits, costs, expenses, damages and judgments based upon infringement of any patent relating to goods specified in this order or the ordinary use or operation of such goods by the City or use or operation of such goods in accordance with bidders direction.

Liability:

The bidder shall assume all liability for damages and shall hold the City free and harmless from all claims of damages to persons and/or property that may arise out of, or by reason of, this contract.

Bankruptcy:

In the event of any proceedings, voluntary or involuntary, in bankruptcy or insolvency, by, or against the Seller (successful bidder) or for the appointment of a receiver or trustee or an assignee for the benefit of creditors, the City shall be entitled to cancel the purchase order or contract at any stage of completion without any liability whatsoever.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 22 of 74

If any of the proceedings described above are taking place at time of bid or occur during the evaluation period or prior to the execution of a purchase order or contract, the City at it's sole discretion may withdraw any further consideration of bidder without any liability whatsoever.

The bidder must inform the City in writing at the time of bid of current or possible proceedings as described in paragraph one in this section.

Waiver:

A waiver of any breach of any provision of this Contract shall not constitute or operate as a waiver of any other provision, nor shall any failure to enforce any provision hereof operate as a waiver of the enforcement of such provision or any other provision.

Contract Administration:

The department shown on page one will perform the primary administration of the contract. Purchasing and other City departments may become involved primarily from an audit standpoint.

City Not Liable for Delays:

It is agreed that in no event shall the City be liable for or responsible to the Contractor(s), any subcontractor or to any other person for or on account of any stoppages or delay in the work herein provided for by injunction or other legal or equitable proceedings or on account of any delay for any cause over which the City has no control.

Packing and Shipping:

No additional charges will be added for packaging and shipping. All goods shall be packaged, marked with: Bid number or purchase order number (if applicable).

Packaging will be in accordance with good commercial practice. An itemized packing list shall accompany each shipment.

F.O.B. Title and Risk of Loss:

The F.O.B. point will be the delivery point listed on the purchase order or contract. The seller will be responsible for all shipping costs Including all applicable transportation and insurance costs. Seller shall bear all risk of loss or damage to the goods, and the title shall not shift to the Buyer, until delivery of the goods to the Buyer's location. The seller will be responsible for all activities associated with the replacement of any damaged goods including damage discovered at time of unpacking or testing.

Cash Discounts:

In the event cash discounts are offered by the bidder, the discount date shall begin with the date of invoice, the date of receipt of all material (unless the City provides for progress payments in this packet) covered by the purchase order, or the date of receipt by the City of Tulsa of the original copy of the purchase order with properly executed Affidavit of Claimant, whichever is the later date.

Sales Tax:

All Federal, State, and local sales tax are not applicable.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 23 of 74

Special Terms and Conditions

Definitions: No additions in this section		
Special Labeling and Packaging of Bid Response: The total number of copies to be included in your response is 10 of each bid (Technical Bid and Cost Bid). 1) Bid bond as the first item at the top of the box labeled box 1 of __. 2) One Copy labeled "Purchasing"; make certain to include the CD securely within this copy. 3) One copy labeled "Original" 4) Eight additional copies labeled "copy"		
Bid Offer Duration (enter number of days): Bidder may not withdraw his bid for a period of <input type="text" value="90"/> days after the date and hour set for the opening of bids		
Electronic copy of bid required (check one): Yes: <input checked="" type="checkbox"/> No: <input type="checkbox"/>		Attach the electronic version to the Technical Bid copy labeled "Purchasing".
PRICE ADJUSTMENT OPTION: The price paid for any commodity or service bid shall not increase during the term of the contract if you are the successful bidder. However, if the bidder anticipates that it will not be able to maintain firm prices for any renewal period, a change in price may be allowed in the renewal of this contract if the following criteria are met: a.) The bidder includes a formula in the initial bid, to be used to calculate a change in price at the time of renewal. Such formula shall be reasonable, objective, and capable of measurement. The City reserves the right to audit such increases. Any pertinent records not made available may be cause for the cancellation of contract or other such remedy as deemed appropriate. b.) The contractor notifies the City, in writing, no later than 30 days prior to expiration of the initial contract period, or any renewal period, of it's intent to exercise the right to escalate or de-escalate prices under the contract. The notice cannot include increases greater than the potential increases bid. The predicted increases will be used in the evaluation of the bid. The increase percentages will be used to calculate the total solution cost. If the consumer price index is used for the renewal increase, the previous years CI will be used to calculate the total solution cost. YOUR RESPONSE MUST BE PRESENTED IN THE APPLICABLE APPENDIX. <i>If a purchase order is used, the above price adjustment option will apply for the term specified in the bid specifications</i>		
Award Method (check one):		
Lowest Cost: <input type="checkbox"/>	Lowest Cost Per Point: <input checked="" type="checkbox"/>	Other: <input type="checkbox"/>



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 24 of 74

Explanation of Award Method:

Evaluation Criteria

The City will evaluate bidders offerings using a point system with a percentage of the points assigned as outlined below.

Evaluation of Bidders

The evaluation committee will use the following criteria in recommending the bid award:

*Tier Definition	Tier Totals
Tier 1 = Fundamental	Tier 1 = 0 – 10 points Max 1,130
Tier 2 = Important	Tier 2 = 0 – 5 points Max 460
Tier 3 = Desirable	Tier 3 = 0 – 3 points Max 168
Tier 4 = Additional Information	Tier 4 = 0 – 1 points Max 87

Total Tier Points = 1,845

Evaluation Criteria Breakdown	Maximum Points/Tier
Cost of Software	25% 923
*Ability to meet City's Needs	50% 1845
Demonstrations	10% 369
References	15% 553

Total Possible Points 3690

Based on the bidder's ability to meet the Tier 1 – Fundamental questions, several of the top bidders, as determined by the highest numerical points, may be asked to perform a demonstration of their product.

Purchase Method (check one):

Contract: <input checked="" type="checkbox"/>	Purchase Order: <input type="checkbox"/>
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Initial Contract term: **1 Year**

Contract renewals (1 Year each):

Total contract term including renewals:



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 25 of 74

Pre-bid Conference (check one)		If Yes	
NO: <input checked="" type="checkbox"/>	YES: <input type="checkbox"/>	Date:	
		Time:	
		Location:	

Explanation:

a. You are encouraged to submit your questions via email to the Project Buyer. This will assist the City in the event research is needed to answer your questions.

b. The City will make its best effort to make sure any questions and answers that add to the clarity and quality of these specifications are made a part of these specifications by addendum to all known bidders.

Bid Bond (check one):		If Yes:	
NO: <input type="checkbox"/>	YES: <input checked="" type="checkbox"/>	Bid Bond Amount:	5 % of Bid amount

Explanation:

If a bid bond is required, it must be enclosed with the bid in the form of a bidder's bond, cash, certified or cashier's check in the amount of shown above. This amount shall be retained by the City of Tulsa as liquidated damages in the event the successful bidder (or bidders) fails to execute a contract, if required. The bidder agrees that said amount is presumed to be the damages sustained by the City due to the impracticability and extreme difficulty in fixing the actual damages. The office of the City Clerk will return the bid deposits to the unsuccessful bidders, after a contract has been awarded or all bids have been rejected.

The City Clerk's Office will return Bid Bond's within 10 days of receiving an executed contract from the successful bidder.

Performance Bond (check one):		If Yes:	
NO: <input type="checkbox"/>	YES: <input checked="" type="checkbox"/>	Performance Bond Amount:	Bid Total

Change Orders:

Change Orders will be required for any modifications outside of bid specifications.

No change orders will be issued prior to contract signing or purchase order issuance whichever is applicable. Exceptions: The purchase of options specified will be allowed within City purchasing guidelines.

No claims for extra work will be allowed unless the City in a written change order had previously ordered it. That change order will include at a minimum:

1. What is to be done in complete detail.
2. Complete description of the work to be done by the contractor including services and goods.
3. Signature of vendor representative.
4. Signature of the MAYOR of the City in the case of a contract. Or, the signature of the Purchasing Agent in case of a purchase order. The Mayor's approval may be required prior to the issuance of the purchase order in some cases in accordance with purchasing guidelines.
5. Include complete documentation in mutually agreed costs approved by the successful bidder's designated representative and approved by the Mayor of the City.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 27 of 74

Acceptance:

See Technical Specification section

Delivery Time Frame:

Timeliness in complying with this bid specification is required. Failure to deliver goods and/or services specified in the bid response in the timeframe outlined in this bid or within your bid response, whichever is sooner shall entitle the City, in addition to any other rights or remedies, to cancel the purchase order or contract and purchase the goods elsewhere, holding the Seller accountable. Payment or acceptance of any goods or services after the delivery date shall not constitute a waiver of the City's right to cancel the order with respect to future deliveries.

Year 2000 Compliance:

Century Compliance: The vendor must certify that all software provided through this bid is "Century Compliant." The criterion for compliance is shown below. Failure to satisfy criteria will make the bid non-responsive. In the event a contract is put into effect based on these assurances and it is determined not to be compliant, the entire contract may be revoked and the vendor will reimburse the City for any expenses incurred in this acquisition including any installation and implementation costs of software.

Software:

Century compliance requires that software satisfy four date-related criteria. Software meeting all four can be considered "century compliant". Each criterion serves as a high-level requirement for software.

References:

See Technical Specifications section

Project Timeline:

Include a timeline of all major events necessary from contract or purchase order receipt through system acceptance to fulfill these specifications completely. This timeline will become a part of the future contract or purchase order depending on award method declared in these specifications.

The successful bidder will be required to expand the project timeline into a complete statement of work. The COT, prior to the successful bidder beginning work, must approve a written statement of work.

See Technical Specifications section

Alternate Solutions

All alternatives will be considered and evaluated equally against any Oracle/Unix solution(s). Oracle/Unix is the COT's standard platform and the preferred solution. You must quote an Oracle/Unix solution first, if your system utilizes this platform.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 28 of 74

Technical Specifications

Work Order and Inventory Management System

Distribution Systems and Financial Planning Sections

Computerized Maintenance Management System (CMMS)





Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 29 of 74

Table of Contents of Technical Specification Section

Section 1 – RFB Questionnaire.....	30
Section 2 – System Implementation, Acceptance and Support	46
Appendix A – Detailed Cost Summary	53
Appendix B – Required Data Elements	59
Appendix C – Standard Ad Hoc Report Requirements.....	66
Appendix D – System History and Expectations.....	69
Appendix E – Workstation Requirements	71
Appendix F - Exceptions to Specifications.....	72
Appendix G – Price Adjustment Options	73
Appendix H– Bidder Check List.....	74



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 30 of 74

Section

1 RFB Questionnaire

Please respond to the following questions in detail without including standard sales literature: (All questions in this section are rated a tier 4, unless otherwise noted beside the question).

1. When was the company founded?
2. How many individuals does the company employ?
3. How many employees are in the following software departments?
 - a. Research and Development
 - b. Product Support
 - c. Marketing and Sales
4. Is the company private or publicly traded?
5. What was the total sales revenue for last year?
6. What is the total sales revenue for your CMMS product for 2000 and year-to-date?
7. What is your company's annual expenditure on research and development?
8. When was the CMMS first developed and on what platform?
9. For what purpose was it originally developed?
10. How many years has the company been developing and marketing CMMS software?
11. How many major releases or versions of the CMMS has the company developed and released?
12. What is the total number of installations of the product?
13. Provide an architectural diagram of the proposed CMMS system showing application components and interfaces for both client and server.
14. Indicate maximum scalability of the system with respect to number of users.
15. To what extent is the company diversified outside of the North American market place?
16. Where are the technical support offices located within North America?



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 31 of 74

17. How many customer sites comparable in size and complexity to the City of Tulsa does your company have? Please provide a contact list of at least five cities.
18. Please provide a contact and phone number for the last two implementations most recently completed.
19. Please include copies of professional resumes of staff that would be assigned to the City of Tulsa's project.
20. Describe strategies and plans for future enhancements to the system including those relating to platforms and technologies.
21. Describe the extent to which the system can be customized. Specify the development tools required to accomplish customization. This includes database customization such as adding database tables and fields.
22. Describe the typical approach or process taken to customize the system in regards to new or changed system functions, menus, screens, report formats, and data tables.
23. Assuming some system customization will be necessary, describe if and how the customized system would be supported by the company and how the customization would be applied to future versions/releases of the system.
24. What third party software does the system natively support?
25. Identify third party products that are required to implement, support, and customize the proposed system. Indicate all costs using the Appendix A - Detailed Cost Summary.
26. Describe the company's business relationship (partnership) and also experiences developing interfaces for systems similar to the City of Tulsa's. List all interfaces developed and describe the nature of the interface for the following:
 - a. Geac human resources package (Tier 1)
 - b. Geac financials (Tier 1)
 - c. Geac fixed asset accounting system (Tier 1)
 - d. DST Innovis Custima/Affinity – customer information and billing package (Tier 1)
 - e. Hansen permits, licensing and customer service (Tier 2)
 - f. NBSI message switch (Tier 3)
 - g. GPS (Tier 4)
 - h. GIS (Tier 4)
 - i. Novell GroupWise, MS Exchange email (Tier 4)
 - j. Oracle (Tier 1)
27. Does the system make and use a set of application programming interfaces (APIs) to create interfaces to other applications? (Tier 1)



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 32 of 74

- 28. Do the systems' APIs support the use of OLE automation? (Tier 1)
- 29. What are the contractual, both implied and expressed, restrictions on making performance-enhancing modifications to the database objects and database object definitions? (Tier 3)
- 30. Describe how the system addresses GASB34. Does the system require asset tracking for GASB34 or is this feature optional? The COT does not wish to use this method of accounting and reporting and does not have a need for this feature.

Change Management

- 31. What is your methodology for accepting programming and application development changes to your system?
- 32. Please explain the types of changes accepted during each of the following phases:
 - Testing
 - Implementation
 - Conversion
 - Post implementation
- 33. How do you determine what changes are needed? Is it based on customer feedback or requests?
- 34. How frequently does your company distribute releases?
- 35. Is each version release standard across the board or are they ad hoc based on each customer's needs?
- 36. Do all customers have the same system or do you customize based on requests?
- 37. When new versions are available, do we have an option to bypass that release? (Tier 3)
- 38. What costs would we incur for changes made during implementation? (Tier 1)
 - Increase
 - Decrease
 - No impact
- 39. Are there additional costs if a change is made after implementation? Please describe. (Tier 1)

Capacity

SC01	Does the system accommodate at minimum 250,000-meter records with associated meter numbers and account numbers?	Tier 1
SC02	Does the system accommodate at a minimum 5,000 miles of water line?	Tier 1
SC03	Does the system accommodate at a minimum 5 inventory warehouses that include at least 3000 total stock items and over 300,000 individual pieces?	Tier 1
SC04	Does the system accommodate at a minimum 2,000 calls per day?	Tier 1



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 33 of 74

SC05	Does the system accommodate at a minimum 1,000 work orders per day?	Tier 1
SC06	What limitations, other than capacity does the system impose for storing historical data i.e., current year plus 5 additional years?	Tier 1
SC07	Does the system accommodate at a minimum 3 Oracle instances or entities? i.e. 3 full sets of data: production, test, and training.	Tier 4
SC08	Does the system accommodate at a minimum 5 general ledger funds?	Tier 4
SC09	Describe the system's method for maintaining multiple metered utilities, i.e., water, gas, and electric. List data elements required for each utility.	Tier 4

Vendor Services

GR01	Describe the company's methods for providing turnkey implementations.	Tier 1
GR02	Describe the company's data conversion services.	Tier 1
GR03	Describe what services are provided as part of the installation process.	Tier 1
GR04	Describe the company's methods and procedures to supply source code for the system.	Tier 3

Support

GR05	Explain what ongoing product support your company provides. Please include office hours, time zone, level of support and minimum response time in your answer.	Tier 1
GR06	Describe the different annual maintenance agreement offerings.	Tier 1
GR07	Describe the media the company uses to provide user's manuals documenting all operations of the software. Please provide examples.	Tier 1
GR08	Describe how the company handles product software development life cycles (SDLC). Where is this product in the SDLC? Are test plans available for review?	Tier 2
GR09	Describe how program patches and minor updates are handled and what is considered part of the support contract.	Tier 2
GR10	Describe the systems help feature. Is context-sensitive help available?	Tier 2
GR11	What options are available for customers to provide input into future product direction?	Tier 3
GR12	Describe the company's software upgrade notification process.	Tier 3
GR13	Explain if online help can be customized for user-defined screens.	Tier 3
GR14	Explain the company's training methods and how training is provided. List training center locations and type of training offered.	Tier 4
GR15	Describe how the company supports local and regional User Groups.	Tier 4
GR16	Describe the methods for communicating information to customers about company events, news, etc.	Tier 4

Hardware/Network

GR17	Does the system allow separate administration for the database and application? Describe this process.	Tier 1
GR18	Describe how the system accomplishes the scheduling of unattended batch processing (i.e., running resource intensive reports at night).	Tier 4
GR19	Describe whether the system integrates with a firewall for Internet connectivity.	Tier 3
GR20	Does the system operate in a client/server environment?	Tier 4



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 34 of 74

GR21	What versions of Oracle are supported?	Tier 4
GR22	What versions of NT, Windows and Windows 2000 are supported?	Tier 4
GR23	Explain whether the system runs in a web browser environment.	Tier 4
GR24	Is the system a true Oracle implementation or are there links or other parallel databases used? Please explain	Tier 4

Software (General)

GR25	Describe the systems utilities for archiving and purging.	Tier 1
GR26	Describe how the software tracks the value of an asset, from the date of acquisition, through the date of disposal.	Tier 4
GR27	Describe the application's access method for retrieving historical information.	Tier 4
GR28	Explain how the system allows access and input through a PC/Network. Is it peer-to-peer, multiple server network or single server network?	Tier 4
GR29	Explain how the system provides field validation.	Tier 1
GR30	Describe how the system migrates all user-defined fields to the next release.	Tier 1
GR31	Please list all file types the system supports and allows users to attach. i.e., GIF, TIF, BLOB, DOC.	Tier 2
GR32	Is the system ODBC compliant?	Tier 1
GR33	Describe the system's method for saving changes to a record when the application is exited unintentionally.	Tier 1
GR34	Describe how the system provides data locking to prevent loss of information by more than one user doing simultaneous updates. Which user's information has priority to update the database?	Tier 1
GR35	Describe how the system handles and allows multiple user inquiry on a single record.	Tier 1
GR36	Describe the systems performance tools for debugging and problem solving.	Tier 1
GR37	Describe the company's application test environment and the approach used for testing.	Tier 2
GR38	Does the system support at least a minimum of 50 concurrent users?	Tier 2
	How does the company license software?	
GR39	a.) Concurrent	Tier 4
GR40	b.) Named users	Tier 4
GR41	c.) MIPS or machine level	Tier 4
GR42	d.) Other	Tier 4
GR43	Describe and list all tools/utilities the system provides and uses for file transfers i.e., import/export.	Tier 2
GR44	Explain limitations the system may have with user added data types.	Tier 2
GR45	List the report writing tools the system uses.	Tier 2
GR46	Describe how the system provides for global data editing.	Tier 2
GR47	Describe how the system searches records. Can the records be any type and from any table in the system?	Tier 2
GR48	Describe how the system uses filters with forms and tables.	Tier 2
GR49	Describe methods the system uses to make data entry of similar records quick and efficient i.e., cut and paste, etc.	Tier 3



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 35 of 74

GR50	Describe how the system allows the user to manipulate information returned from a query i.e. select the information and load to another form.	Tier 2
GR51	List and explain the language or tools used to develop the system, i.e., Visual Basic, Power Builder, etc.	Tier 3
GR52	Describe how the system accommodates user-defined fields and user-defined values to be used in a pull down table. Does this task require technical skills or can a user easily perform the task?	Tier 2
GR53	Explain if the system requires any programs to be re-compiled or any source code changed when additional data fields are added.	Tier 4
GR54	Describe and list standard form templates. Can the template be edited or customized?	Tier 3
GR55	Describe if the system allows users to customize their toolbar and does it "gray-out" buttons on the toolbar that the user does not have security access to use.	Tier 3
GR56	Does the system provide a "clear" button that removes all data from all fields on the current form?	Tier 4
GR57	Describe the systems lookup feature. Does it allow the user to specify the number of fields on the lookup before performing a query?	Tier 4
GR58	Describe how date fields are handled. What options are available for entering dates?	Tier 3
GR59	Describe the software's administration functions. Does it provide the ability to back up and restore database files?	Tier 2
GR60	Describe how a user would resize a table/list box on a form to increase the number of rows displayed?	Tier 4
GR61	Is the system 4-digit century compliant (mmddccyy)?	Tier 4
GR62	Explain the procedure that would allow the user to modify screens (any and all) to change the order in which fields are presented.	Tier 3

Security

GR63	Does the system have a database administration module to allow a system administrator to manage user access?	Tier 1
GR64	Describe the applications security features. i.e., enforce unique passwords per user, role security, field level and screen level.	Tier 1
GR65	Does the system provide remote system administration capabilities?	Tier 4
GR66	Describe any port requirements for the operation of the application locally or remote. Also list the port numbers required.	Tier 2
GR67	Describe any operating system hardening methods used during software installation if any.	Tier 2
GR68	Describe the systems user authentication process. Is this accomplished through the operating system, application or both?	Tier 2
GR69	Explain any file permission changes, which occur by the installation of the application. List the types of file permissions in key areas of the application.	Tier 2
GR70	Describe the System Administrator account function to allow recovery of the system in the event the Administrator password is changed, lost or forgotten. How often does the System Administrator password need to be changed?	Tier 2



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 36 of 74

GR71	How does the licensing of the software affect the operating system licensing?	Tier 2
GR72	Describe the system bandwidth requirements between server and client.	Tier 2
GR73	Describe the traffic load the system will place on the network.	Tier 2

Work Order (General)

WO01	Describe how the system generates scheduled and unscheduled work orders?	Tier 1
WO02	Describe how the system notifies users of duplicate service requests by location?	Tier 2
WO03	Describe how the system displays work order and work order history at a location or an area for a specified date range?	Tier 1
WO04	Describe how the system updates the display with the most recent activity performed on each asset?	Tier 1
WO05	Describe how the system retrieves a service request based on the following: Location, Work Order Number/Service Request Number, Customer Name, Asset, Date, etc.	Tier 1
WO06	Describe how the system retrieves work order history from partial field entries. i.e., partial or full street address.	Tier 1
WO07	Describe how the system accommodates user-defined queries on opened and closed work orders.	Tier 1
WO08	Describe the systems ability to list open work orders by address, type, class and activity code organized by address displayed on screen?	Tier 1
WO09	Describe how the system tracks utility locate information.	Tier 1
WO10	Describe the methods for printing service requests.	Tier 1
WO11	Describe the methods for displaying or printing work orders and the data elements available to print by.	Tier 1
WO12	Describe how the system links multiple service requests to a work order and multiple work orders to a project number.	Tier 1
WO13	Describe in detail how the system closes a work order.	Tier 1
WO14	Describe how a work order is re-opened once it has been closed.	Tier 1
WO15	Please provide your definition of the following and explain how they are used in your system: activity code and task	Tier 4
WO16	Describe how the system allows a user to assign a priority to a work order.	Tier 1
WO17	Describe how the system defines and groups assets. i.e., valves, hydrants, meters.	Tier 1
	Describe the systems method for storing a minimum of two years test results for the following:	
WO18	a.) Hydrant assets i.e., static pressure, residual pressure and flow rate and inspection date.	Tier 1
WO19	b.) Valves assets i.e., results of an inspection and inspection date.	Tier 1
WO20	c.) Backflow preventers i.e., results of an inspection, inspection date.	Tier 1
WO21	d.) Meter testing/calibration results and dates	Tier 1
WO22	e.) Leak detection tests results	Tier 1
WO23	Describe and list the data elements used by the system to identify valves, hydrants,	Tier 1



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 37 of 74

	and meters i.e., meter serial number, location, atlas page, hydrant number, etc.	
WO24	Describe how the system links new work orders to existing work orders by location.	Tier 1
WO25	Describe how the system triggers an action upon closing a work order depending on work action, type, or findings i.e., create a follow-up work order.	Tier 2
WO26	Describe how the system accommodates user-defined queries.	Tier 2
WO27	Describe the system's protocol for providing online access to images and/or scanned files such as tap records ("location cards"), photographs, etc.	Tier 2
WO28	Describe how the system provides cross-referencing capability for associating assets with areas/locations/assets i.e., backflow preventer associated with a park; commercial or industrial, hospital or street segment.	Tier 2
WO29	Describe how the system records all valve operations performed on a work order and how it updates the valve asset inventory.	Tier 1
WO30	Describe how the system records all hydrant operations performed on a work order and how it updates the hydrant asset inventory.	Tier 1
WO31	Describe how the system displays upstream or downstream assets (i.e., mains, manholes, valves, fire hydrants, etc.) and their corresponding information.	Tier 2
WO32	Describe how the system displays multiple water, sewer, and storm endpoint asset types (i.e., manholes, valves, outlets, etc.).	Tier 2
WO33	Describe how the system allows asset group fields to be searched either on an asset's component ID, address, unit type, area, sub-area, district, location, installation date, and service status.	Tier 2
	Explain whether the system stores and tracks (at a minimum) the following assets and list those which require a user defined field:	
WO34	a.) Hydrant(s)	Tier 1
WO35	b.) Water Backflow Preventer	Tier 1
WO36	c.) Water Main Line	Tier 1
WO37	d.) Water Meter	Tier 1
WO38	e.) Water Pump	Tier 1
WO39	f.) Water Storage Unit	Tier 1
WO40	g.) Water Valve	Tier 1
WO41	h.) Special Valves: pressure sustaining/regulating valves	Tier 1
WO42	i.) Lift Station	Tier 3
WO43	j.) Sewer Backflow Preventer	Tier 3
WO44	k.) Sewer Manhole	Tier 3
WO45	l.) Sewer Main Line	Tier 3
WO46	m.) Sewer Pump	Tier 3
WO47	n.) Storm Channel	Tier 3
WO48	o.) Storm Detention Facility	Tier 3
WO49	p.) Storm Inlet	Tier 3
WO50	q.) Storm Manhole	Tier 3



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 38 of 74

WO51	r.) Storm Main Line	Tier 3
WO52	s.) Storm Pump	Tier 3
WO53	Describe how the system provides notification of work completion to a designee (i.e., an email to customer service representatives).	Tier 2
WO54	Describe how the system captures information on preexisting damage and damage caused by crews.	Tier 3
WO55	Describe whether work order screen formats are customizable.	Tier 4
WO56	Describe whether the system allows queries on a "comments" field for a work order.	Tier 4
WO57	Describe how the system provides batch processes by specified work orders, i.e., printing closing, deletion, etc.	Tier 4

Data Entry

	Describe the various ways the system defines locations:	
WO58	a.) Street/service address	Tier 1
WO59	b.) Intersection	Tier 1
WO60	c.) Line segment	Tier 2
WO61	d.) Other unique identifiers	Tier 2
	Describe how the system accommodates numerous alpha-numeric reference numbers for a location on a work order for the following:	
WO62	a.) A minimum 9-digit customer account number. Please explain.	Tier 1
WO63	b.) A minimum 12-character contract number. Please explain.	Tier 1
WO64	c.) A minimum 10-digit meter number. Please explain.	Tier 1
WO65	d.) A minimum 26-character utility locate field. Please explain.	Tier 1
WO66	Describe how the system manages street naming conventions, prefix, suffix, and direction.	Tier 1
WO67	Describe how the system accommodates street name aliases.	Tier 3
WO68	Describe how the system limits the acceptance of correctly spelled street names based on an address database or table.	Tier 1
WO69	Describe whether the system includes date, time, user stamp and modification on data entry records.	Tier 1
WO70	Describe how the system handles field content from pop up screens for data entry while allowing authorized users to add new data.	Tier 2
WO71	Explain how the system handles required fields with locked progression. Can the user specify which fields are required?	Tier 2
WO72	Describe the systems method of work order number sequencing.	Tier 4

Workflow

WO73	Describe how the system notifies a designated user(s) of events, such as main breaks, leaks, by-passes, etc.	Tier 2
WO74	Describe the system's methodology for supporting business rules.	Tier 2
WO75	Describe how the system handles business rules that allow user-defined workflows.	Tier 2



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 39 of 74

WO76	Describe how the system displays workflow in a graphic format.	Tier 3
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Navigation

WO77	Describe the system's method for closing open forms.	Tier 4
WO78	Describe how the system handles managing of multiple forms on the screen.	Tier 2
WO79	Describe how the system uses tabs to keep forms self-contained, as opposed to using multiple separate windows to perform all available functions.	Tier 4
WO80	Describe how the right mouse button is used within a field to access the pop-up list of valid values for the field.	Tier 2
WO81	Describe the process of navigating from screen-to-screen and module-to-module without having to return to a main menu.	Tier 2
WO82	Explain as the user navigates between screens whether the system transfers information from one screen to next.	Tier 2

Customer Service

WO83	Describe how the system tracks and maintains a complete history for each caller or service address.	Tier 1
WO84	Describe how the system assigns equipment, location, customer account, crew, or event to a work order.	Tier 1
WO85	Describe how the system handles service requests which will/will not be approved to create a work order.	Tier 1
WO86	Describe how the system detects when multiple calls have been taken for addresses within close proximity. i.e., same block/street.	Tier 4
WO87	Describe the process to (1) manually and (2) automatically create a work order from an approved service request.	Tier 1
WO88	Describe how the system provides access to caller histories i.e., previous calls, comments, and actions taken.	Tier 1
WO89	Explain how queries are performed on meters.	Tier 1
WO90	Describe how different meter type codes are accommodated by the system.	Tier 4
WO91	Describe how the system tracks inquiries about crews or contractors.	Tier 2
WO92	Describe the method for tracking multiple contacts per address i.e., tenants.	Tier 2
WO93	Describe how the system displays/prints meter locations on a work order.	Tier 2
WO94	Explain what cost information is available on a work order.	Tier 4
WO95	Describe, recommend and explain what systems are available to track call durations, identify caller via Caller ID and populate key fields. List those that work with your system and your experience with interfacing.	Tier 4

Scheduling

WO96	Describe the system's work order scheduling function and how it handles backlogged, unscheduled, and scheduled work orders. What data elements does it use as sorting criteria (job type, location, date, and crew).	Tier 1
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Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 40 of 74

WO97	Describe how the system performs scheduling. Does it provide selective scheduling of work orders? Is there an override capability? Does it use a priority scheme, based on the request origin, user, crews, and work types?	Tier 3
WO98	Describe what flexibility the system has in providing drag-and-drop scheduling i.e., drag-and-drop work orders from one day to another.	Tier 3
WO99	Describe the system's methods for scheduling work. Does the system have automatic/optional/manual and selective rescheduling of a scheduled maintenance activity based on user preference?	Tier 4
WO100	Describe the systems method for allocating available labor resources and materials.	Tier 4
WO101	Does the system check the availability of the necessary material before scheduling a work order? Can this option be disabled?	Tier 4
WO102	Describe how the system assigns work to a crew and an individual employee.	Tier 4

Labor

WO103	Explain how the system captures each employee number and name assigned to a crew.	Tier 1
WO104	Describe how the system tracks the location and travel time to a crews' work location. Please explain in detail.	Tier 2
WO105	Describe how the system captures crew and crew member's time at the job site on each work order.	Tier 4
WO106	Explain how the system tracks vehicle assignments. Is this automatic to specific crews and/or job types?	Tier 3
WO107	Describe how the system generates associated work orders when multiple crews/disciplines are required. Is this manual or automatic?	Tier 4
WO108	Describe the system's crew routing capabilities.	Tier 4
WO109	Describe how the system suggests crew assignments based on work type?	Tier 4

Work Order Accounting

WO110	Describe the line items available for applying costs to work orders.	Tier 2
WO111	Does the system allow individuals and crews to be specified when costing work orders?	Tier 2
WO112	Does the system create a cost entry for each employee, equipment unit, and material listed on the work order?	Tier 1
WO113	Explain how the system performs labor costing by employee classification.	Tier 2
WO114	How does the system accommodate job costing for out of class pay?	Tier 2
WO115	Will the system perform labor costing by crew type? Please explain.	Tier 2
WO116	Will the system perform equipment costing by vehicle type?	Tier 2
WO117	Will the system perform equipment costing by crew, multiple crews, individuals, and multiple individuals?	Tier 1
WO118	Describe the method the system uses to handle multiple wage rates per individual per job.	Tier 1
WO119	Explain how the system records the use of multiple equipment (i.e., backhoe, flusher truck, vactor, etc.) including equipment ID, hours used and extended costs.	Tier 2



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 41 of 74

WO120	Describe the method the system uses to group, capture, and report costs at all levels (i.e. project, job, work order).	Tier 1
WO121	Explain how the system applies charges to a closed work order. Please list each data element. (i.e., labor, material, equipment).	Tier 2
WO122	Describe how the system allocates general ledger account assignments at the work order level.	Tier 2
WO123	Describe how the system manages standard materials list based on job type.	Tier 2
WO124	Describe the systems methodology for processing standard units of measure for materials and labor hours. List each data element with a unit of measure.	Tier 2
WO125	Will the system perform labor costing by General Ledger (GL) fund?	Tier 2
WO126	Does the system allow labor input in tenths or fractions of an hour?	Tier 4
WO127	Describe how the system costs work orders, by average or actual wages.	Tier 4

Inventory, Parts & Supplies

WO128	Does the system value inventory, parts and supplies using average cost, LIFO, and FIFO?	Tier 1
	Does the system handle the following transaction types:	
WO129	a.) Receipts	Tier 1
WO130	b.) Issues	Tier 1
WO131	c.) Transfers	Tier 1
WO132	d.) Returns from field	Tier 2
WO133	e.) Adjustments	Tier 1
WO134	f.) Scrap	Tier 2
WO135	Does the system allow materials to be issued and relieved from inventory based upon issuance from warehouses instead of using work orders as the vehicle or trigger to accomplish the transactions? Please explain.	Tier 2
WO136	Describe how the system maintains an audit trail of all inventory transactions.	Tier 2
WO137	Describe query and reporting capabilities available for the audit trail.	Tier 1
WO138	Is each item in a warehouse supported by an account code (i.e., account code is used to tie each item to a funding source for purchasing and reporting by types of inventory, such as account 1402 for water meters)?	Tier 1
WO139	Are inventory transactions tied to account numbers (i.e., using area accounts) that are different from the account numbers referred to in the preceding question? (For use in tracking usage by areas other than those associated with an items purchase).	Tier 1
WO140	Can inventory adjustments be processed to adjust item dollar value and/or quantity?	Tier 1
WO141	Does the system utilize minimum and maximum stock levels?	Tier 1
	Explain whether the system has a screen or other method of displaying the following information for individual parts:	
WO142	a.) Usage summary for current month by type of transaction i.e., issue, purchase, adjustment	Tier 2

**Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02****Description: Work Order and Inventory Management System****Department: Public Works****City of Tulsa**

Page 42 of 74

WO143	b.) Usage history summary including net usage by month for previous twelve months.	Tier 2
WO144	Describe how the system differentiates between the units of measure for purchase of an item vs. stocking the item.	Tier 2
WO145	Describe the systems software tools used to develop stock/inventory catalogs; displaying item stock numbers and available inventory from various warehouses.	Tier 2
WO146	Describe how the system works with bar-coding devices for managing inventory input and what hardware is used to support this function.	Tier 2
WO147	Describe how the system maintains and tracks inventory cyclical counts, date last counted, and next scheduled audit.	Tier 2
WO148	Can acceptable substitutions & alternate brands be identified for each warehouse item?	Tier 2
WO149	Describe the systems methodology for supporting multiple locations for each item in a warehouse.	Tier 2

Ordering

WO150	Describe the systems purchasing, requisition and invoice modules. How does the system handle these functions? Are these add-on applications or do they come bundled with the system?	Tier 1
WO151	Explain how the system assigns a requisition number to a requisition.	Tier 1
WO152	The COT legacy system generates a purchase order number, which must be tied to this system's purchase order number. Does the system allow the user to assign the purchase order number?	Tier 1
WO153	Explain how the system manages the number of line items allowed on requisitions and purchase orders i.e., maximum number of line items.	Tier 1
WO154	Can a user override and/or supply the estimated cost of items on a requisition?	Tier 1
WO155	Can a purchase order contain lines from multiple requisitions?	Tier 1
WO156	Can purchase order lines support multiple deliveries with different delivery dates?	Tier 1
WO157	Describe the contents of your vendor directory.	Tier 2
WO158	Does the system maintain a record of the last purchase for each inventory item i.e., vendor name, quantity received, and date of receipt?	Tier 2
WO159	Describe how your system handles requisitions containing a mix of stocked, non-stocked items and/or services.	Tier 2
WO160	Can the system use blanket purchase orders in the purchase of stock items?	Tier 2
WO161	Does the system provide Electronic Data Interchange (EDI) with vendors and direct fax to vendors via a simple print solution?	Tier 4

Receiving

WO162	Describe how the system would handle over receiving where the quantity delivered is greater than what was ordered.	Tier 1
WO163	Describe how the system handles partial receipts.	Tier 1



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 43 of 74

WO164	Can the user flag receipt of an item as final, where the shipment is less than the quantity ordered and no more are to be delivered? And does this eliminate the purchase orders backorder record?	Tier 1
WO165	Explain how your system handles reversed receiving i.e., erroneous entry.	Tier 2

Invoicing

WO166	Does the system match-up and update purchase order lines and inventory item valuations when invoices are processed?	Tier 2
WO167	Explain how the system prorates extra charges across the lines of a purchase order and/or to individual lines.	Tier 2

Field Communications

WO168	Describe how information is exchanged between the office-based application and the field-based application and what wireless protocols are supported. i.e., Motorola's RDLAP, CDPD, etc..	Tier 2
WO169	Describe how the system provides for remote capture of work creation and completion via laptop, hand-held, or pen-based computer. Please identify which units are compatible.	Tier 2
WO170	Describe how the system functions with the following products: Citrix, MWCS II. Does your company have any experience with protocols these products support? Please explain.	Tier 2
WO171	Describe how field based applications captures GPS locations.	Tier 2
WO172	Describe whether the system provides remote access to GIS.	Tier 3

Permits, Applications & Inspections

WO173	Describe your systems Permits, Licensing and Inspections applications.	Tier 3
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Preventive & Predictive Maintenance

WO174	Describe how the system handles deferral, approval, or cancellation of PM jobs.	Tier 1
WO175	Explain what triggers resetting of the PM schedule.	Tier 1
WO176	Explain the system's capability to handle the following: 1) one-time PMs 2) seasonal/cyclical PMs and 3) calendar-based PMs. Describe each process individually.	Tier 3
WO177	Explain whether the system can schedule an unlimited number of activities for each asset.	Tier 2
WO178	Describe how the system schedules work orders based on the following: 1) noise and vibration monitoring, 2) temperature monitoring and, 3) fluid level monitoring. Explain each process individually.	Tier 3

Construction & Contract Management

WO179	Describe how the system assigns and tracks jobs performed by outside contractors and how the contractor company information is maintained.	Tier 3
WO180	List the data elements available for capturing contractor site visits, i.e., daily progress reports, etc.	Tier 3



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 44 of 74

WO181	Describe how the system tracks contract change orders.	Tier 3
WO182	Describe the system's ability to manage capital and construction projects.	Tier 3
WO183	Describe the method used to manage annual contracts for routine and emergency maintenance.	Tier 3
WO184	Describe the systems decision support capabilities. Does the system support budget preparation for previously funded projects and projects in various phases of design in construction?	Tier 3
WO185	Describe the reports the system includes for contractors and construction, i.e., contract variance reports.	Tier 3

GIS

WO186	Describe the functional aspects of your GIS map.	Tier 3
WO187	Describe what type of information is displayed within the actual GIS. Please include an illustration.	Tier 3
WO188	Describe the system's method for capturing field data to illustrate on the GIS display. Is it updated immediately upon entry of the data into the system?	Tier 3
WO189	Describe how the system displays gate status on GIS, i.e., open/closed.	Tier 3
WO190	Describe what type of information is displayed for a work order and whether the information can be queried by job type on the GIS display.	Tier 3
WO191	Describe how the system provides access to crew locations on the GIS display and how this information is communicated and updated on the GIS display.	Tier 3
WO192	Explain how the system handles a grid search for work orders either by atlas page or a smaller geographic area.	Tier 3
WO193	Explain how the system identifies an address and the location of all assets and whether specific reference points or coordinates accomplish this.	Tier 3
WO194	Describe how the system identifies the location of the "active" inquiry/work order i.e., other service requests/work orders, construction activities, crews, etc. within proximity on the GIS display.	Tier 3
WO195	Describe how the system groups creation of work orders based on a GIS grid location.	Tier 3
WO196	Explain how the system displays all corresponding node connections by asset on the GIS display.	Tier 3
WO197	Explain whether the system performs queries by location, crew, contract number, etc. through the GIS display.	Tier 3
WO198	Explain how the system generates a map, whether it illustrates the location and with what level of detail.	Tier 3

Reporting

WO199	Explain how the system provides individual productivity and group productivity cost analysis reports. Can this be done by: task, date range, job, location, and crew?	Tier 1
WO200	Explain how the system uses filtering, wild card searches, partial searches, Boolean logic, and sorting criteria on data elements and descriptions. Please explain each separately.	Tier 1
WO201	Describe the method in which multiple database tables are accessed during an ad hoc report request and include the maximum number of tables the request allows.	Tier 1



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 45 of 74

WO202	Describe the types of wizards available to help customize reports and service/work orders.	Tier 2
WO203	<p>Does the system provide or is it capable of providing a month end inventory accounting summary report which shows beginning balances, purchases, material usage, by account by item for the month end?</p> <p>Example:</p> <pre> 5.0.E 06:24:36 CURRENT MONTH ACTIVITY REPORT ISSUED NBR QTY/BALANCE QTY/AMT QTY/AMT QTY/AMT QTY/AMT QTY/AMT QTY/AMT ISSUED QTY PRICE/UN 44001010 POLYWRAP - THICKNESS 8 MILS/WIDTH 28" FUND: 007020 ACCOUNT: 001403 105 2,600 200 705.46 54.20 125 625 68 200.20 21.76 ACCOUNT 001403 TOTALS: 59,566 7,654 5,299 226 1164,826.52 64,805.22 59,984.23 12.53 </pre>	Tier 1
WO204	Describe the system's ability to generate reports based on a schedule i.e., every 30, 60, and 90 days.	Tier 2
WO205	Explain the systems' ability to edit, save, and rerun queries.	Tier 2
WO206	Explain what flexibility the user has in formatting reports and queries	Tier 2
WO207	Describe how the system allows views into the database. Can the views be saved and automatically updated the next time they are launched?	Tier 2
WO208	Explain if the system allows all report information to be viewed in a graphic format. Can the user choose more than one graphic format and also modify the graphs, i.e., titles, axis, labels, color, etc?	Tier 2
WO209	Can bin labels be printed for items in inventory?	Tier 2
WO210	Describe how the system reports the computed average cost of a work order, i.e., by task, given a set period of time.	Tier 2
WO211	Describe how the system generates user-defined form letters i.e., notification letters.	Tier 3



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 46 of 74

Section

2

System Implementation, Acceptance, and Support

Implementation Requirements

This section describes the requirements for implementation of the new Computerized Maintenance Management Software (CMMS) specified in this Request for Bid.

The bidder must provide all services required to make the system fully operational. This includes software installation, configuration, and setup. The system will be field tested to determine the accuracy of data processing, compliance with the functional requirements described in this document, and the system's ability to meet minimum response times.

Project Schedule and Project Team

The response for this section shall include the following materials and should be placed in a section within the Technical Bid Binder of the Bid:

- Professional resumes of the technical staff and the project organization chart of the Bidder's implementation team
- A detailed implementation approach for basic and additional services
- A specific project timeline, including target dates and milestones with related payment schedule as approved by the COT (see *Payment Method*)
- Any constraints or limitations for performing the work
- Any assumptions made in your response

Client System Requirements

The response for this section shall include minimum and maximum client workstation requirements. Provide good, better and best configuration settings. Include workstation requirements in Appendix E – Workstation Requirements.

Data Migration and Conversion

To provide a complete and functional system, the new CMMS will require data to be loaded into the database. Some of this data currently resides in other systems. Additional data will be entered manually using data entry forms of the new CMMS, or imported using import utilities.

Data Sources and Metrics

The City Of Tulsa is responsible for exporting its data from the existing systems to be loaded into the



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 47 of 74

new CMMS. The following table lists some of the data the City Of Tulsa believes is necessary for a CMMS and identifies data the City Of Tulsa currently has in electronic format. The electronic data will be exported in an ASCII, comma delimited format.

Data	CONTENTS	Approximate Number of Records
UMS/SOMS Valve & Hydrant	Atlas Pg, Loc, Make, Description	Valves = 39,073 Hydrants = 15,195
Custima/Affinity – Meter records	SN, Make, Address, Date installed	Meter Cans = 160,315 Meter Inventory = 272,536
PALS – Permits	Issued Permits & Inspections	Permits = 262,905 Licenses = 12,274
DELM – Line maintenance	Address, work done	2400
Preventive Maintenance – PM	PM work and address	6500
Water Loss Report	Excel Spreadsheet	1800
Leak Break History Report	Excel Spreadsheet	400

Appendix B – Required Data Elements; provides a table of additional data fields also required to satisfy the request for data elements in the new CMMS. For each data element please provide the field type, whether alpha, numeric or both and the length of the field. Include costs in Appendix A – Detailed Cost Summary.

1. Based on the approximate number of records from the above table, provide a cost bid to perform the database migration and conversion. Enter the cost in the Detailed Cost Summary, Appendix A. Data conversion will be a joint cooperation between the City Of Tulsa and the vendor. The City Of Tulsa reserves the option of performing the data migration internally.
2. The bidder must perform the necessary data verification routines during the data conversion and loading. The City Of Tulsa will be responsible for correcting data flagged as incorrect by the bidder and for providing updated data files for loading by the bidder.

Data Conversion Recommendations

Prior to implementation of the system the successful bidder is required to provide a data conversion recommendation or plan for approval by the City Of Tulsa.

The following will be required:

1. Recommendations for data collection and loading



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 48 of 74

2. Sample copies of data collection/loading forms recommended for use in loading data from non-electronic sources
3. List and describe any loading tools and utilities required
4. List recommended data loading utilities
5. Describe data loading routines
6. Describe how data verification will be accomplished during data loading or conversion

Standard and Ad Hoc Report Requirements

Appendix C – Required Reports; lists the new CMMS required reports. Please indicate which reports are standard by entering a “Y” or “N” in the “Report Available” column.

Training Requirements

Overview

This section describes the requirements for onsite training at the City Of Tulsa. The following is an approximate number of students to be trained in their respective areas:

Staff Area of Responsibility	Approximate Number of Trainees
Field Users	25
Administrative/Clerical	40
Information Systems Staff	7
Reporting System Users	5

Training

The City of Tulsa has a training facility located in the downtown area with approximately ten personal computers configured with Microsoft Windows NT, connected to the City of Tulsa’s wide area network. The City Of Tulsa will ensure the availability of this or comparable location for the delivery of training. Bidders will include the following information in the response for this section of the RFB:

1. A course syllabus for each course in the training program
2. A training schedule for each course showing course duration
3. Detailed course outline and list of handouts
4. Instructor qualifications and references
5. Standard training course costs, based on a unit such as per-course or per-student
6. An all-inclusive cost estimate that summarizes the costs for the instructor's travel, meals, lodging, course fees, and course materials. Course lengths specified for on-site training are for actual instruction time. Cost submittals should include the total time for preparation, support, and delivery of training. Preparation will include installation and testing of software on existing hardware
7. Describe the configurable hardware, software, networking, and any other items required
8. List any assumptions you have relative to training



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 49 of 74

Training Quality Assurance

The bidder must use instructors who are regularly engaged in training and are savvy in the use of the software and hardware used to deliver the training program.

Programmers, analysts, system engineers, and other staff may not be used as trainers, unless these individuals are part of the training organization. The City Of Tulsa will monitor training and may request changes it believes will improve learning outcomes.

Training Program

1. The bidder should use full-time instructors for each course. The City Of Tulsa requires that the instructor does not perform other duties that will interrupt instruction during this period.
2. Vendor instructors will provide training onsite in Tulsa.
3. Any software located on the City Of Tulsa's configured PCs that is modified for training must be restored to its original condition at the completion of training.
4. Bidder's training plan is to be agreed upon by the City Of Tulsa prior to implementation.
5. The City Of Tulsa may audio and/or videotape on-site training sessions at its option.

System Testing, Cutover, and Final Acceptance

Preliminary Acceptance Testing

The purpose of the preliminary acceptance testing is to simulate real operational conditions and ensure that the system is functional and meets all specifications prior to system implementation.

The successful Bidder must submit a preliminary acceptance test plan one month prior to the test. Once approved by the City Of Tulsa, the test plan will be used to ensure that the system meets the specifications. Further, the system has to meet the following performance criteria while a minimum of 25 concurrent users are accessing the system:

1. Any system screen shall be displayed within 3 seconds.
2. Any database query should return results within 5 seconds.
3. Any database query of archived media should return results within 2 minutes.
4. Application server utilization shall not exceed 50 percent at any given time using "Unix Monitor" or some other comparable utility mutually agreed on by the City Of Tulsa.
5. The relational database wait time shall not exceed 1 second at any given time using "I-Monitor by Quest" or some other comparable utility mutually agreed on by the City Of Tulsa.

The system will pass the testing after it has proven to be fully functional, stable and reliable in addition to meeting all requirements. The City Of Tulsa will make the final determination whether the system meets the requirements.

System Cutover

System cutover begins when the City Of Tulsa has tested the system in a full operational mode during which the application fully supports users in their day-to-day activities and all application functionality is in use. The system cutover will take place only after a successful preliminary test and after the bidder has met all the



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 50 of 74

required software development and after final data conversion needed to begin production. The City Of Tulsa will determine if the system is ready for cutover.

Operation System Testing Review

The purpose of the system testing is to test the system in real operational conditions and ensure that the system is fully functional and meets all specification. System testing could be in parallel with continued operations of existing City Of Tulsa automated and manual systems.

The successful bidder must submit a test plan one month prior to the test. Once approved by the City Of Tulsa, the test plan will be used to ensure that the system meets the specifications. Further, the system has to meet the following performance criteria while 50 concurrent users are accessing the system:

1. Any system screen shall be displayed within 2 seconds.
2. Any database query should return results within 4 seconds.
3. Any historical database query (archived media) should return results within 1 minute.
4. Application or client utilization shall not exceed 40 percent at any given time.
5. The relational database server utilization shall not exceed 50 percent at any given time.

The system will pass the system testing after it has proven to be fully functional, stable and reliable in addition to meeting all requirements. The City Of Tulsa will make the final determination if the system meets the specifications.

Operational Availability Demonstration

After the testing is completed, the system will be monitored for a minimum of 90 calendar days. This will ensure system stability and performance. The City Of Tulsa will restart the 90-calendar day requirement should the system exhibit any major failures or when a major software modification is performed.

Final Systems Acceptance

The system will be accepted after the following is accomplished:

- All test plans and the Operational Availability Demonstration period is successfully completed.
- Action items generated during testing are successfully resolved and completed.
- User, technical, and support training is developed and delivered.
- Application server utilization does not exceed 70 percent at any given time using. Scrutiny of the server is accomplished using "Unix Monitor" or some other comparable utility mutually agreed on by the City Of Tulsa.
- The relational database wait time does not exceed 2 seconds at any given time using. Scrutiny of the database is accomplished using "I-Monitor by Quest" or some other comparable utility mutually agreed on by the City Of Tulsa.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 51 of 74

Documentation Requirements

This section describes the requirements for the user operations and maintenance (O&M) documentation that must be provided with the response to this RFB and that must be provided upon system installation.

Documentation RFB Response

The bidder shall include the following information in the response for this section:

1. A complete list of the manuals and documentation (indicate title and content).
2. Outlines, formats and samples of representative pages of manuals for any and all documentation (i.e., customization, configuration, etc.) that has to be produced during system installation/implementation.
3. Two (2) copies of all documentation on electronic medium such as compact disk or 3 ¼ inch diskette.
4. Specify cost for additional sets of documentation (hardcopy and electronic) delivered with the product – provide a standard price list.

Supplied System Documentation

The successful bidder shall provide the following documentation prior to System Final Acceptance.

Provide two (2) sets of the following documentation:

- CMMS system administration manuals, reference manuals
- Configuration documentation/manuals
- Entity Relationship Diagrams
- Database Data Dictionary
- Database Schema and other manuals, regardless of title which are intended for use in operation and on-site support of the system.

Provide two (2) complete sets of the CMMS user manual in an easily reproducible format (unbound, letter size pages).

Revisions to Documentation

All software updates and revisions to documentation will be supplied to the City Of Tulsa. The bidder shall not charge the City Of Tulsa for this service when contracted system maintenance (a support agreement) is in effect.

Support Requirements

The City Of Tulsa requires the bidder to provide technical support for the application, its tools, third party software that may be part of the delivered system, and any custom elements delivered in compliance with this project. Support shall also include, without additional cost, provision by bidder of all application upgrades and releases for the duration of the term of the Support Agreement. City Of Tulsa will provide technical personnel to help trouble shoot problems or provide technical information as may be required by the bidder's technical staff during problem solving.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 52 of 74

Terms of Support Agreement and Warranty

The successful bidder will provide a warranty period commencing from the final acceptance of the application by the City Of Tulsa and continuing for no less than twelve (12) months following that date. There shall be no cost associated with this warranty period. The bidder warrants that the system will operate in accordance with the system specifications during the warranty period.

The successful bidder will provide contracted systems maintenance and support in no less than one (1) year increments following the end of the warranty period. This support should be at the level specified within this section of the RFB.

The system shall remain supported by the bidder for a minimum of four (4) years after the final acceptance.

Cost Break Out

Costs for support services is required to include annual costs and terms for support of all software, including both the "core" application, and any interfaces developed during the life of this project.

- Vendors may add any additional line items that are not included in cost tables on a separate sheet of paper. The additional sheet must show the total contract price.
- Interface requirements will be determined in Phase II of the project.
- Other items may be included or removed from this contract at the City of Tulsa's discretion.
- All prices proposed must be valid for a year from the date of final contract.

Payment Method

- The City Of Tulsa will reimburse for all goods and services when invoiced as long as there is value received and the milestones including payment milestones are met. A payment milestone must be in return for value received. No upfront payments will be allowed. Value received can be defined that the City has received something that it can use for something. A box of software is not useful but a statement of work has value and is useful.
- Each payment is contingent upon receiving a formal sign off from the City Of Tulsa
- Payment for third party software, licenses, and travel expenses is rendered at the time of delivery
- Payment is rendered for all other items, including but not limited to: professional services, custom programming, and testing after formal sign off from the City Of Tulsa and receipt of an invoice
- Ten (10) percent of the total performance bid is retained by the City and will be disbursed after successful completion of the system acceptance phase
- Software support begins after all components are installed and operational. The operational date is tied to a project milestone and commences one year after the warranty has lapsed and all software components have been certified as a production status



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 53 of 74

APPENDIX A
City of Tulsa
Department of Public Works

Detailed Cost Summary

INSTRUCTION TO BIDDER:

ALL COSTS MUST BE QUOTED WITH A NOT TO EXCEED DOLLAR VALUE. ANY LINE ITEM LEFT BLANK OR UNDETERMINED IS CAUSE FOR DISQUALIFICATION.

IF SOFTWARE IS BUNDLED OR REFERRED TO BY A NAME OTHER THAN WHAT IS LISTED IN OUR COST SHEET, PLEASE REFER TO THE GENERAL TERMS & CONDITIONS FOR A DEFINITION OF EACH MODULE.

IF THE MODULE IS INCLUDED AS PART OF THE STANDARD OR BASE PACKAGE PLEASE INDICATE BY PUTTING INCL. IN THE EXTENDED PRICE COLUMN.

COMPANY NAME: _____



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 54 of 74

1. BASIC CONTRACT SERVICES (SEE TERMS AND CONDITIONS FOR MODULE DEFINITIONS)

ITEM	Unit Cost	Quantity	Unit of Measure	Extended Cost
<p>1.1 SOFTWARE: THE FOLOWING COSTS ARE BASED ON 50 CONCURRENT USERS, UNLESS OTHERWISE STATED. ADD ADDITIONAL ROWS IF THERE ARE MORE MODULES OR SUB-MODULES NEEDED TO MEET THE REQUIREMENTS. IF YOUR SYSTEM DOES NOT INCLUDE A MODULE PUT N/A IN THE UNIT COST COLUMN.</p>				
1.1.1 WATER MODULE				
1.1.2 CUSTOMER SERVICE				
1.1.3 SERVICE REQUEST				
1.1.4 WORK ORDER				
1.1.5 PREVENTIVE MAINTENANCE				
1.1.6 JOB COSTING				
1.1.7 WAREHOUSE AND INVENTORY				



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 55 of 74

1.1.8 PURCHASING NOTE #1				
1.1.9 REQUISITION NOTE #1				
1.1.10 SYSTEM ADMINISTRATION & SECURITY				
1.1.11 USER TOOLS & UTILITIES				
1.1.12 ADDITIONAL SYSTEM MODULES (PLEASE LIST)				
SUB TOTAL OF ALL SOFTWARE				
1.2 PROJECT MANAGEMENT				
1.3 SYSTEM SETUP AND CONFIGURATION COSTS				
1.4 CLIENT SETUP AND CONFIGURATION COSTS				
1.5 SYSTEM TESTING, CUTOVER, AND FINAL ACCEPTANCE				

SUBTOTAL OF BASIC CONTRACT SERVICES (ITEMS 1.2 TO 1.5) _____

TOTAL OF SECTION 1 (1.1 TO 1.5) _____

**Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02**

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 56 of 74

2. PROFESSIONAL SERVICES

(PRICES MUST INCLUDE BIDDER'S OVERHEAD AND TESTING COSTS. OVERHEAD COSTS INCLUDE PROJECT MANAGEMENT, SUBMITTALS, AND ADMINISTRATION. ALL HOURLY COSTS APPLY TO ANY PROFESSIONAL SERVICES REQUESTED IN WRITING BY THE COT OVER AND ABOVE THE ORIGINAL CONTRACT SPECIFICATIONS.)

ITEM	Unit Cost	Quantity	Unit of Measure	Extended Cost
2.1 DATA CONVERSION AND MIGRATION		@ 640 hours		
2.2 TRAINING SERVICES ONSITE IN TULSA, OK. CONSIDER THE COST FOR 3 NON-CONTIGUOUS TRAINING SESSIONS. (INCLUDE ADDITIONAL LINES FOR OTHER COURSES NOT LISTED)				
2.2.1 SYSTEM CONFIGURATION COURSE		3 DAYS		
2.2.2 USER TRAINING		10 DAYS		
2.2.3 SYSTEM ADMINISTRATOR TRAINING		3 DAYS		
2.2.4 TRAVEL EXPENSES, TRANSPORTATION, MEALS & LODGING FOR TRAINER (S)				
2.3 SYSTEM DOCUMENTATION		2	CD	
2.3.1 SYSTEM ADMINISTRATION MANUALS		2	CD	
2.3.2 TECHNICAL CONFIGURATION MANUALS		2	CD	
2.3.3 REFERENCE MANUALS		2	CD	
2.3.4 OTHER REFERENCE MANUALS (SPECIFY)		2	CD	

TOTAL SECTION 2 PROFESSIONAL SERVICES (2.1 TO 2.3.4) _____



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 57 of 74

3. SOFTWARE SUPPORT COST

ITEM	Unit Cost	Quantity	Unit of Measure	Extended Cost
3.1 COST OF SYSTEM MAINTENANCE & SUPPORT FOR A 1 YEAR CONTRACT (AFTER EXPIRATION OF 1 ST YEAR WARRANTY)		1	YR	
3.2 COST OF SYSTEM MAINTENANCE & SUPPORT FOR 2 ND YEAR		1	YR	
3.3 COST OF SYSTEM MAINTENANCE & SUPPORT FOR 3 RD YEAR		1	YR	
3.4 COST OF SYSTEM MAINTENANCE & SUPPORT FOR 4 TH YEAR		1	YR	
3.5 COST OF SYSTEM MAINTENANCE & SUPPORT FOR 5 TH YEAR		1	YR	

TOTAL FOR SECTION 3 SOFTWARE SUPPORT COST (3.1 TO 3.5): _____

4. OTHER COSTS REQUIRED TO COMPLETELY RESPOND TO SPECIFICATIONS.

ITEM	Unit Cost	Quantity	Extended Cost
4.1 CUSTIMA/AFFINITY (CUSTOMER BILLING SYSTEM) INTEGRATION		800 hours	
4.2 HANSEN (PERMITS AND LICENSING) INTEGRATION		640 hours	
4.3 GEOGRAPHIC INFORMATION SYSTEM INTEGRATION		640 hours	
4.4 GEAC INTEGRATION		640 hours	
4.5 LICENSES			
4.5.1 COST OF 1 ADDITIONAL REMOTE SOFTWARE LICENSE			
4.5.2 COST OF ADDITIONAL CLIENT LICENSE			
4.5.3 COST OF AN ENTERPRISE LICENSE (UNLIMITED USERS)			



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 58 of 74

4.5.4 INCREMENTAL COST OF 10 ADDITIONAL CONCURRENT USERS			
4.5.5 INCREMENTAL COST OF 100 ADDITIONAL CONCURRENT USERS			

TOTAL OTHER COSTS (4.1 TO 4.5.5): _____

TOTAL FOR PERFORMANCE BOND (ITEMS 1 & 2 BELOW) _____

ENTER THE SUB-TOTALS FOR:

1. BASIC CONTRACT SERVICES _____

2. PROFESSIONAL SERVICES _____

3. SUPPORT COSTS _____

4. OTHER COSTS _____

5. COSTS NOT INCLUDED _____

TOTAL COST: _____

Name: _____ Title: _____
(Signature)

_____ Company: _____
(Print Name)

Date: _____

Note #1: The city at its option may not purchase modules: 1.1.8 Purchasing and 1.1.9 Requisition. If we elect not to purchase these modules , we will remove the cost and any points from consideration.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 59 of 74

APPENDIX B
Required Data Elements

Instructions: Use character(s) A = Alpha or N = Numeric or A/N = Alpha Numeric to respond to Required Data Elements Appendix B. Do not add additional characters. Include the field length.

ID	Data Required	Alpha/Numeric A/N	Field Length
	Parts & Supply Inventory		
1	Warehouse name or number		
2	Stock part number		
3	Stock item description		
4	Stock unit of measure		
5	Account code		
6	Minimum stock level		
7	Maximum stock level		
8	Quantity on hand		
9	Quantity on order		
10	Last price		
11	Average cost		
	Inventory Transactions		
12	Warehouse name or number		
13	Stock part number		
14	Transaction quantity		
15	Account (issued to)		
16	Transaction code		
17	Transaction date		
18	Transaction or ticket number		
19	Work order number		
20	Job order number		
21	Crew number		
22	Vehicle/Equipment number		
23	Transaction date entered		
	Requisitions		
24	Requisition number		
25	Requisition date entered		
26	Requisition status		



APPENDIX B

Required Data Elements

ID	Data Required	Alpha/Numeric A/N	Field Length
27	Requisition line number		
28	Requisition line status		
29	Warehouse name or number		
30	Stock part number		
31	Stock item description		
32	Stock unit of measure		
33	Account code		
34	Quantity requested		
35	Average cost		
	Purchase Orders		
36	Purchase order number		
37	Purchase order date entered		
38	Purchase order status		
39	Purchase order line number		
40	Purchase order line status		
41	Requisition number		
42	Requisition line number		
43	Warehouse name or number		
44	Stock part number		
45	Stock item description		
46	Account code		
47	Quantity requested		
48	Actual cost		
49	Vendor name		
	Call Tracking (Dispatch)		
50	Customer name		
51	Customer address		
52	Address type (residential/commercial)		
53	Service address		



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 61 of 74

APPENDIX B
Required Data Elements

ID	Data Required	Alpha/Numeric A/N	Field Length
54	Street address		
55	Street alias		
56	Description of request		
57	Customer comments		
58	C/S Representative		
	Service Request		
59	Customer name		
60	Customer address		
61	Address type (residential/commercial)		
62	Service address		
63	Street address		
64	Street alias		
65	Description of request		
66	Customer comments		
67	C/S Representative		
68	Service order number		
69	District number		
70	Activity code		
71	Date of service		
72	Action taken		
	Work Orders		
73	Customer name		
74	Customer address		
75	Address type (residential/commercial)		
76	Service address		
77	Street address		
78	Street alias		
79	Work order number		



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 62 of 74

APPENDIX B
Required Data Elements

ID	Data Required	Alpha/Numeric A/N	Field Length
80	Service order number		
81	Utility locate number		
82	District number		
83	Unit name		
84	Unit type		
85	Asset make		
86	Asset number		
87	Asset type		
88	Asset size		
89	Asset sequence number		
90	Asset atlas page		
91	Asset location		
92	Asset condition		
93	Asset group		
94	Project group		
95	Crew member name		
96	Crew member number		
97	Crew member title		
99	Crew location		
100	Activity code		
101	Activity status (completed/pending)		
102	Hours		
103	Miles		
104	Material name		
105	Material cost		
106	Material unit		
107	Labor rates		
108	Job class		
109	Crew type		



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 63 of 74

APPENDIX B
Required Data Elements

ID	Data Required	Alpha/Numeric A/N	Field Length
110	Date of service		
111	Service start time		
112	Service end time		
113	Action taken		
114	Description of request		
115	Customer comments		
116	C/S Representative		
117	Hazardous Conditions		
	Materials		
118	Warehouse name or number		
119	Stock part number		
120	Stock item description		
121	Stock unit of measure		
122	Account code		
123	Work order number		
124	Asset number		
125	Asset location		
126	Material name		
127	Material cost		
128	Material unit		
	Equipment		
129	Unit name		
130	Unit type		
	Labor		
131	Service address		
132	Street address		
133	Street alias		
134	Contract number		



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 64 of 74

APPENDIX B
Required Data Elements

ID	Data Required	Alpha/Numeric A/N	Field Length
135	Work order number		
136	Service order number		
137	Project group		
138	Crew member name		
139	Crew member number		
140	Cost		
141	Hours		
142	Activity code		
143	Activity status (completed/pending)		
144	Labor rates		
145	Job class		
146	Crew type		
147	Date of service		
148	Service start time		
149	Service end time		
	Job Costing		
150	Service address		
151	Street address		
152	Street alias		
153	Work order number		
154	Utility locate number		
155	District number		
156	Unit name		
157	Unit type		
158	Unit name		
159	Unit type		
160	Asset make		
161	Asset number		



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 65 of 74

APPENDIX B
Required Data Elements

ID	Data Required	Alpha/Numeric A/N	Field Length
162	Asset type		
163	Asset size		
164	Asset sequence number		
165	Asset atlas page		
166	Asset location		
167	Asset condition		
168	Asset group		
169	Project group		
170	Crew member name		
171	Crew member number		
172	Quantity		
173	Cost		
174	Hours		
175	Miles		
176	Material name		
177	Material cost		
178	Material unit		
179	Labor rates		
180	Job class		
181	Crew type		
182	Date of service		
183	Service start time		
184	Service end time		



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 66 of 74

APPENDIX C

**Standard and Ad Hoc
Report Requirements**

Instructions: Use the characters defined in the legend below to respond to Report Requirements – Appendix C. Do not add additional characters. Also see Terms & Conditions for a brief description of report information. Including sample reports within your response is optional.

LEGEND

Column	Instructions
Report Available	Please indicate with a Y or N (Yes or No) if the system provides each of the listed reports.
Standard Reports/Ad Hoc	S = Standard reports, X = Ad Hoc Reports
Graph or Chart	X = Need to graph or chart data

ID	Report Name	Report Available (Y/N)	Standard Report/Ad Hoc (S/A)	Graph or Chart
1	Customer Inquiry			X
2	Water Outage			X
3	Water Operations			X
4	Call Volume			X
5	Open/Pending Work Orders			X
6	Completed Work Orders			X
7	PM Work Orders			X
8	Scheduled/Maintenance Work Orders			X
9	Maintenance History			X
10	Activity Summary			X
11	PM Workload Forecast			X
12	Daily Crew			
13	Water Line Leak			X
14	Water Loss			X
15	Water Line Break			X
16	Remove and Install			X
17	Physical Asset Inventory			X



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 67 of 74

ID	Report Name	Report Available (Y/N)	Standard Report/Ad Hoc (S/A)	Graphic
18	Equipment Usage			X
19	Tool Usage			X
20	Meter Usage			X
21	Copper Usage			X
22	Equipment Unit Cost			X
23	Vehicle Mileage			X
24	Miscellaneous Costs (i.e., job costing)			X
25	Monthly DELMS			X
26	Check Reservoir Lights			X
27	Monthly Break Leak Summary			X
28	Water Consumption			X
29	Chlorine Tank			X
	Requisitions			
30	Requisition			
31	Requisition Register			
32	Purchase Order			
33	Purchase Order List			
34	Vendor Directory Report			
35	Vendor Master List			
36	Invoice Entry Proof			
	Inventory			
37	Parts Inventory – Projected Purchase Requirements (Complete with current and historical usage, and quantities on order)			
38	Parts Inventory – Count Scheduling			
39	Parts Inventory – Warehouse Comparison			
40	Parts Inventory – Multiple Warehouse Comparison			



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 68 of 74

ID	Report Name	Report Available (Y/N)	Standard Report/Ad Hoc (S/A)	Graphic
41	Parts Inventory – Transaction Analysis			
42	Parts Inventory – Accounting Recon - ciliation Material Usage Summary			
43	Parts Inventory – Warehouse Catalog Creation Aide			
44	Parts Inventory – Adjust Summary			
45	Parts Inventory – Material Usage Summary			
46	Parts Inventory – Bin Labels			
	Inventory Transaction Proof Listings – Issued as Work is Entered			
47	Receiving Entry Transaction Proof			
48	Inventory Adjust Entry Transaction Proof			
49	Invoice Transaction Proof			



APPENDIX D

SYSTEM HISTORY AND EXPECTATIONS

In 1981, the City of Tulsa Water and Sewer Department (now The Public Works Department), Distribution Systems and Financial Planning Sections, purchased the Utilities Management System (UMS) software. The system was automated over eighteen years ago with UMS/SOMS. Today the software looks similar to the original installation in the early 1980's utilizing a text-based menu structure.

The UMS system is used to track warehouse inventory, materials, and supplies, requisitions, purchase order requests and provides month end general ledger processing by accounting cycle to balance the UMS system general ledger and inventory. Distribution Systems also uses it to generate service orders and work orders. The UMS module allows entry of employee, crew, material, and equipment time for each service order.

The purpose of this project is to find a turnkey CMMS (Computerized Maintenance Management System) to replace the current UMS/SOMS system. The turnkey solution must include: software, installation during phase I and interface, and conversion services in phase II. The system must run and support Compaq Alpha Servers, Oracle version 8i or later and the most current version of True64 Unix. Because this project is for the Distribution Systems and Financial Planning/Logistics sections only, **it does not include other sections of the Public Works Department in its scope.** The system must provide work scheduling, preventive maintenance scheduling, work monitoring, productivity reporting, job costing, cost of services, inventory tracking, and work history.

The project plan has three phases of implementation. The focus of this RFB is Phase I; however, the system must have phase II and III capabilities.

- I. Phase I - System Selection & Implementation (2002)**
 - a. Platform/Hardware Selection
 - b. Software selection
 - c. Hardware & Software installation and setup
 - d. Apply Defined Business Rules & Work Flow Processes to new system
 - e. Data conversion
 - f. User training
 - g. Information Technology administration and system training
 - h. Systems Integration
 - i. Pilot testing
 - j. Pilot testing acceptance
 - k. Documentation of procedures
 - l. Documentation acceptance
 - m. System documentation
 - n. Final testing and acceptance

- II. Phase II – Wireless and Remote Implementation (2003)**
 - a. Additional users and licenses



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 70 of 74

- b. Hardware and software for remote connectivity (host and client)
- c. Pilot test new modules
- d. Testing and acceptance of new modules
- e. Pilot test remote connectivity from the field
- f. Final testing and acceptance

III. Phase III – System Enhancements & Upgrades (2004)

- a. Purchase remaining software licenses
- b. Purchase remote client hardware, hardware upgrades, etc.
- c. Final testing and acceptance

Distribution Systems needs a system that has been developed with wireless capabilities to allow field clients access to the system. COT's wireless infrastructure utilizes Motorola's 800 Mhz radio system, RDLAP and MWCS II, and NBSI message switch. The Tulsa Police Department has used the infrastructure successfully for over a year. The system needs to be web enabled and work with Microsoft's desktop office suite. Integration to human resources and financial packages, third party customer information and billing system, fixed asset accounting system, GIS, permit and licensing software, third party e-mail, and third party telephone systems is also needed during phase II and III of the project.

No additional manpower or hiring of staff will be required with the replacement of this system. It is expected existing staff efficiency will increase allowing current staff to take on additional duties and responsibilities.



APPENDIX E

Workstation Requirements

I. Minimum:

II. Maximum:

III. Optimal:



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 72 of 74

APPENDIX F

Exceptions taken to Specifications

If the bidder wishes to take exception to any part of these specifications (technical specifications and all terms and conditions), he does so with the full knowledge and understanding that his bid may be rejected

You MUST answer the following question. Omission of the following statement will render the bid incomplete and may disqualify you from the bidding process:

I (circle one) have or have not taken any exceptions to these specifications.

If you have taken exception explain in detail below.



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02
Description: Work Order and Inventory Management System
Department: Public Works

City of Tulsa

Page 73 of 74

APPENDIX G

Price Adjustment Option

This is a firm price Invitation for Sealed Bid. Price adjustments are only allowed for renewals. The increase maximums will be added to the total solution cost and used to determine the "potential total solution cost".



Invitation for Sealed Bid 01-406 Addendum #1 dated 4-4-02

Description: Work Order and Inventory Management System

Department: Public Works

City of Tulsa

Page 74 of 74

APPENDIX H

Bidder Check List

This checklist is provided to assist the bidder with packaging and sending the final bid.

- **Emailed Purchasing Agent of intent to/not to bid.**
- **Circled answer in Appendix F – Exceptions taken to Specifications.**
- **All documents notarized.**
- **Questions in Section 1 answered and included.**
- **Bid Bond**
- **CD or Diskette with technical bid and cost bid.**
- **10 copies of the Technical Bid.**
- **10 copies of the Cost Bid.**
- **1 of the 10 copies labeled “Original” and 1 labeled “Purchasing”**