**EXHIBIT A: FLEET MANAGEMENT SYSTEM AND SUPPORT FEATURES**

Below are the basic features the City would like in a fleet management system. There may be additional features not listed that the vendor could provide.

\*Denotes a mandatory item

#Denotes a desired item

^Denotes an optional item

Please respond fully to each item as indicated below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Features/Components** | | **Yes/No** | **Comments** |
| ***1. General System Requirements for either web-based or windows based software*** | | | |
| a. | \*Operate on Microsoft SQL Server  2012 R2 platform |  |  |
| b. | \*Operate on Windows 7/8 or newer |  |  |
| c. | \*Ability to operate in a virtualized server environment |  |  |
| d. | \*Multi-level security based on user  permissions |  |  |
| e. | \*Must comply with City of Duluth security standards |  |  |
| f. | \*Vendor access will be controlled by City of Duluth  IT using approved access methods/software and during  regular business hours, unless otherwise necessary |  |  |
| g. | \*System needs to operate in a real-time mode – all files affected by a transaction are updated at the time of the transaction |  |  |
| h. | \*Capable of interfacing with multiple third  party applications such as fuel management and financial software |  |  |
| i. | #Web browser interface |  |  |
| j. | \*Support use on tablets, iPads, iPhones, or smart  phones |  |  |
| k. | \*Wireless must follow City of Duluth standards or  be approved by IT |  |  |
| l. | \*Citrix compatible |  |  |
| m. | \*Graphical user interface must be user friendly |  |  |
| n. | \*System should be an off the shelf package with user  definable configuration allowing flexibility to match site specific practices |  |  |
| o. | #Automatic email capabilities based on  User-defined criteria. |  |  |
| p. | \*Provide easy navigation between  functions (i.e. work orders/parts/vehicle record) |  |  |
| q. | \*Ability to easily drill down to other  modules/fields of the software |  |  |
| **Features/Components** | | **Yes/No** | **Comments** |
| r. | \*Ability to have a separate database  instance for testing purposes |  |  |
| s. | #Templates available for addition of vehicles |  |  |
| t. | \*Vehicle search capability - including but not limited to the following – by Year, Make, Model, VIN, Type, etc. |  |  |
| u. | \*Must include a closed work order scan capability |  |  |
| v. | \*Parent/Child capability must exist to order to track associated equipment attached to vehicles (plows, wings, compressors, etc.) |  |  |
| w. | \*System must allow asset transfer from one fleet client to another |  |  |
| x. | #System should house a catalog of standard vehicles along with the options for outfitting those vehicles |  |  |
| y. | #System should provide tracking of vehicles from cradle to grave (including retirement auction and amount received) |  |  |
| z. | #Please list the total number of attributes, including user defined fields supported in your system along with information on those attributes |  |  |
| aa. | #System must be able to associate a VIN to a license plate |  |  |
| bb. | #System must track licensing, registration, plate management, license renewal, etc. |  |  |
| cc. | #System must include the ability to schedule license tab renewal |  |  |
| dd. | \*Ability to interface with New World Logos .Net Financial system for General Ledger Fund Accounts, Departments, Procurement, Vendor Supplier List, Accounts Payable, Journal Entry |  |  |
| ee. | \*Ability to interface with Holiday Station Store application for fuel card tracking, transaction, and fuel management data |  |  |
| ff. | \*System needs to integrate with a document management system for storage of documents |  |  |
| gg. | \*System needs to maintain at least seven years of history for data retention requirements |  |  |
| hh. | \*System needs to have a catastrophic loss/recovery plan |  |  |
| ii. | \*System must have ability to receive inventory for assets, parts, etc. |  |  |
| jj. | \*System must have ability to manually process invoices |  |  |
| kk. | \*System must have the ability to batch process invoices and receipting, along with approvals |  |  |
| ll. | #System must have the ability to track sublet repairs |  |  |
| mm. | \*System must have the ability to track all aspects of the repair history |  |  |
| nn. | #System must have the ability to manage recalls and bulletins |  |  |
| **Features/Components** | | **Yes/No** | **Comments** |
| oo. | #System must have tire management capabilities |  |  |
| pp. | #System should have a robust Incident and Accident management tracking system with the capability to store or link to photos, accident reports, estimates, etc. The expenses for accident repairs should be able to be separated from general repairs. If the vehicle is removed from service the disposal details (salvage value, date of disposal, etc) need to be captured in the system. Reporting capability must exist to track number of incidents and related costs with ability to break down to the department and vehicle levels. |  |  |
| ***2. Vehicle/Equipment Inventory:*** | | | |
| a. | \*Set up vehicles/equipment by asset  number (at least 8 digit alpha-numeric) |  |  |
| b. | \*Department field |  |  |
| c. | \*Department sub-field (Division) |  |  |
| d. | \*General Ledger Accounting Code - Allocation (000-000-0000-0000-00 format) |  |  |
| e. | \*Year, Make, Model Fields |  |  |
| f. | \*Purchase Order Number |  |  |
| g. | #Purchase Price |  |  |
| h. | #Vendor |  |  |
| i. | #Leased/Owned |  |  |
| j. | \*Customizable vehicle classifications (based on GVW) |  |  |
| k. | \*Sub Class (Overall description 1 ton truck, sedan) |  |  |
| l. | \*Description |  |  |
| m. | \*Color |  |  |
| n. | \*Placement/Location |  |  |
| o. | \*VIN/Serial Number |  |  |
| p. | \*Odometer –Select miles/hours |  |  |
| q. | ^Driver Assigned to Vehicle |  |  |
| r. | \*Fuel Card Number |  |  |
| s. | \*Actual Rate/Rental Rate |  |  |
| t. | #Charge Back Rate |  |  |
| u. | ^GPS |  |  |
| v. | #Purchase Date |  |  |
| w. | #Purchased New/Used/Rental |  |  |
| x. | \*In-Service Date |  |  |
| y. | ^Sold Date |  |  |
| z. | ^Auction Price |  |  |
| aa. | #Useful Life |  |  |
| **Features/Components** | | **Yes/No** | **Comments** |
| bb. | ^Replacement Year |  |  |
| cc. | \*Main Engine Make, Model, Serial #, Cyl #, Liters, Horsepower, Fuel Type |  |  |
| dd. | #Aux Engine Make, Model, Serial #, Cyl #, Liters, Horsepower, Fuel Type |  |  |
| ee. | #Empty Vehicle Weight |  |  |
| ff. | #Body Type |  |  |
| gg. | #Body Manufacturer, Model, Spec.Equipment |  |  |
| hh. | #Brakes Front and Rear (Pads, Rotors, Shoes, Drums, Brake Chambers, Slack Adjusters |  |  |
| ii. | #Front and Rear Axle Make, Model, Capacity, Code |  |  |
| jj. | \*Tires (Brand, Size, Ply, PSI) |  |  |
| kk.. | \*Gross Vehicle Weight |  |  |
| ll. | \*Fuel Type |  |  |
| mm. | #Fuel Tank Capacity |  |  |
| nn. | \*Transmission Make, Model, Serial #, Code, PTO |  |  |
| oo. | \*Wheelbase |  |  |
| pp. | #Track parts specific to vehicle (tire size,  filter type, lights, brakes, etc) |  |  |
| qq. | \*License Plate # |  |  |
| rr. | \*Title Number |  |  |
| ss. | #Customizable fields for inspections,  misc. permits |  |  |
| tt. | \*Photos/Document attachment |  |  |
| uu. | \*Warranty Tracking - Parts and Service |  |  |
| vv. | \*User Defined Fields – at least 20 fields with at least 100 characters each |  |  |
| ww. | \*Ability to assign peripherals/smaller equipment to vehicle |  |  |
| xx. | ^Ability to see pending PM and scheduled  repairs upon opening asset record |  |  |
| yy. | ^Ability to group or categorize assets to  help schedule PM |  |  |
| zz. | \*Ability to track state inspections, annual  renewals or any other site-specific inspections |  |  |
| aaa. | #Ability to track accidents |  |  |
| ***3. Capital Asset Management*** | | | |
| a. | #Provide a vehicle replacement screen that  calculates replacement based on user defined criteria |  |  |
| **Features/Components** | | **Yes/No** | **Comments** |
|  |  |  |  |
| b. | \*System must identify vehicles for replacement, along with detailed lifecycle cost and total cost of ownership reports |  |  |
| c. | #Ability to access depreciation, salvage  value, remaining months of useful life, repair costs, fuel costs, life to date on screen or through a report |  |  |
| d. | #Ability to track vehicles out of service and/or sold through auction |  |  |
| e. | \*System must allow recycling of unit numbers, yet allow for historical data to remain intact |  |  |
| f. | \*Vehicle Type (V) Vehicle (E) Equipment |  |  |
| g. | \*Vehicle Assigned Allocation/Fund |  |  |
| ***4. Preventative Maintenance Scheduling*** | | | |
| a. | \*User Defined Fields – at least 15 fields with at least 40 characters each |  |  |
| b. | \*Ability to track standard PM information in addition to (including but not limited to) Last PM Mileage, Last PM Date, Next PM Date, Next DOT Date, etc. |  |  |
| c. | \*View/Modify PM schedule |  |  |
| d. | ^Ability for departments to request and/or  schedule preventative maintenance or repair services, as well as track progress |  |  |
| e. | #Automatic PM triggered by user defined  Parameters/criteria |  |  |
| f. | #Auto-notify end users and shop of PM due, as well as Special Order Parts received |  |  |
| g. | ^System calendar used to schedule or have  ability to interface with Microsoft  Outlook calendar |  |  |
| h. | \*Create standardized PM schedules |  |  |
| i. | ^Ability to convert PM into work order  and assign mechanic |  |  |
| j. | ^Customizable job lists, parts required for  PM types, tied to asset number |  |  |
| h. | \*PM Lists (Oil, Air, Primary Fuel, Secondary Fuel, Fuel Separator, Coolant Filter, Air Compressor Filter, Transmission Filter, Hydraulic Filter, Power Steering Filter, Air Drier, Cabin Air, etc. |  |  |
| **Features/Components** | | **Yes/No** | **Comments** |
| ***5.Work Orders*** | | | |
| a. | \*Use of VMRS codes for work orders |  |  |
| b. | \*Easy drill down to parts inventory to  attach parts to work orders, or based on bar code reader |  |  |
| c. | \*Ability to add work order reason codes |  |  |
| d. | \*Must contain a work order priority status codes |  |  |
| e. | ^Ability to create checklists and activities  as part of work order |  |  |
| f. | \*Ability to add parts via bar code scanner |  |  |
| g. | \*Ability to add multiple PM items to work  order |  |  |
| h. | #Ability to create/store template work orders |  |  |
| i. | #Track active work hours on the job |  |  |
| j. | ^Save/remember routine processes-parts  for work orders |  |  |
| k. | #Special Order Parts Reminders |  |  |
| l. | \*Ability to auto create work orders based  on user defined criteria |  |  |
| m. | ^Remember parts used from previous  work orders and alert if parts not in stock |  |  |
| n. | ^Outside vendor tracking, including costs |  |  |
| o. | \*Ability to mark up prices, as needed on work orders |  |  |
| p. | \*Ability to print work orders - contents to be determined during implementation process |  |  |
| ***6. Parts/Supplies Inventory*** | | | |
| a. | \*Must be able to accommodate current bin locations which are 10 character alpha-numeric in length |  |  |
| b. | #Must be able to accommodate and track parts in 3 separate bin locations |  |  |
| c. | \*Part number fields at least 25 character alpha-numeric in length |  |  |
| d. | \*Part description field at least 45 characters in length |  |  |
| e. | \*Class/Manufacturer field |  |  |
| f. | \*Cost structure based on FIFO |  |  |
| g. | \*Must be able to adjust parts in and out of inventory by exception |  |  |
|  |  |  |  |
| **Features/Components** | | **Yes/No** | **Comments** |
| h. | \*Barcoding system able to produce in house barcodes that include P/N, description, and bin location, and able to read manufacturer’s UPC codes. |  |  |
| i. | \*Ability to Track Parts, average moving costs, locations, min/max quantities |  |  |
| j. | \*Display parts on order or back order |  |  |
| k. | \*Generate stock orders automatically based on user defined re-order points and/or quantities |  |  |
| l. | \*Historical inquiry capability for up to a minimum of 10 vendors for each P/N with corresponding cross reference numbers and last price in |  |  |
| m. | #Parts warranty tracking based on any of the following: miles, hours, months, Vehicle ID, Unit #, Part # |  |  |
| n. | \*Rolling part number changes without effecting historical sales |  |  |
| o. | \*Track w/ability to search orders based on Part Number, PO, Vendor, and Date |  |  |
| p. | #Search inventory capability by (including but not limited to) part number, cross-reference number, vendor, stock status, bin location, description, vehicle make, model, year, or key word |  |  |
| q. | \*Ability to set parts as stock or non-stock |  |  |
| r. | #Capability for tracking return/date tracking as well as appropriate client billing adjustment |  |  |
| s. | \*Capability to set price manually on any inventory or non-inventory parts |  |  |
| t. | \*Ability to attach multiple ID pictures to parts records |  |  |
| u. | #Ability to issue parts to departments without generating a work order |  |  |
| v. | \*Ability to generate stocking guides and orders based on user defined criteria |  |  |
| w. | \*Ability to track vendor number (currently 4 digit numeric field) |  |  |
| x. | #Ability to associate parts to asset  number(s) |  |  |
| y. | \*Ability to mark up prices, as needed on work orders |  |  |
| **Features/Components** | | **Yes/No** | **Comments** |
| z. | \*Ability to track vendors including, address, vendor number, contact information (name, phone, fax, email, etc.) |  |  |
| aa. | ^Ability to track vendor account terms including discounts, contract 3, Tax ID, sales history, annual PO#, PO budget information, due dates |  |  |
| bb. | \*Ability to export invoice from vendors  into New World Logos .Net Financials |  |  |
| cc. | \*Purchase order integration with New World Logos .Net Financial system |  |  |
| dd. | \*Full integration with work order system |  |  |
| ***7. Mechanic Time Tracking*** | | | |
| a. | #Active hours/inactive hours |  |  |
| b. | #Scheduling |  |  |
| c. | ^Certifications |  |  |
| d. | \*Hourly Rates |  |  |
| e. | #Separate login for mechanics either  through computer on shop floor or their own mobile option |  |  |
| ***8. Other Employee Tracking*** | | | |
| a. | ^Employees assigned to vehicle |  |  |
| b. | ^Commercial driver’s license tracking auto  notification when renewal is due |  |  |
| c. | ^Other certifications |  |  |
| ***9. Fuel Management*** | | | |
| a. | ^Input miles/hours, gallons, date, costs of fuel, ties with PM schedule |  |  |
| b. | \*Ability to manually edit/enter odometer readings |  |  |
| c. | \*Support manual entry of fuel transactions |  |  |
| d. | \*Ability to interface with and import data from the Holiday Station Store fuel software for fuel card tracking of all fuel transactional data |  |  |
| e. | \*Ability to make Fuel Corrections |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Features/Components** | | **Yes/No** | **Comments** |
| ***10. Reports*** | | | |
| a. | \*Provide a list of available pre-built reports including but not limited to general fleet management such as lifecycle management, asset utilization, life-to-date, year-to-date, monthly financial reports for each cost type aggregated by fleet client and total fleet, fuel use, repair history, parts/vehicle inventory, mechanic hours, user defined obsolescence, exception reports, parts usage reports, etc. Reports should be provided in both summary and detail. |  |  |
| b. | #Multi-level reporting on vehicles with select capability by asset, client, etc (including all attributes) |  |  |
| c. | \*Transaction history report including number, date, description, vendor, amount, PO#, price |  |  |
| d. | \*Inventory balance and general use reporting |  |  |
| e. | \*Inventory Adjustment capability |  |  |
| f. | \*Historical listing of parts used |  |  |
| g. | #Ability to provide a “report card” consisting of key performance indicators (KPIs) for regular review and action for individual departments, as well as the Fleet service center |  |  |
| h. | #Ability to save criteria in ad-hoc or pre-built reports for routine reports |  |  |
| i. | #Ability to view reports on screen before  printing |  |  |
| j. | #Ability to create robust ad-hoc reports |  |  |
| k. | \*Ability to produce reports/prints by the following criteria, including but not limited to: pricing and usage for parts issued, vendor, parts receipt, auto orders, parts transferred, backordered, alternate part number, warranty information, manufacturer, part number cross reference, etc. |  |  |
| l. | \*Ability to export reports to Excel, pdf, csv, xml formats |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Features/Components** | | **Yes/No** | **Comments** |
| ***11. Annual Maintenance and Support*** | | | |
| a. | \*Do you have a Service Level Agreement? Explain the details of your SLA. (Business hours, after hours, response times for system fixes, system availability, etc.) |  |  |
| b. | #Are there support options available for non-business hours? If so, what are they and are there additional costs for after-hours support? |  |  |
| c. | #What type of application documentation is available online for users? |  |  |
| d. | #Is online user documentation updated for each upgrade? |  |  |