

Rock River Water Reclamation District - Enterprise Asset Management - Feature, Function, and Capability Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?..000) should have only one "1". **Blank rows will be scored as Not Available.**

Legend:

Standard - Current	Available in current software release
Standard - Next Release	Guaranteed available in next release of software
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
Application	Number	Work Order & Asset Management							
Work Order & Asset Mgmt	1.000	WORK ORDERS (MAINTENANCE MANAGEMENT)							
Work Order & Asset Mgmt	1.001	AGENCY WORK ORDER CATEGORIES AND SUBTYPES - Ability to create unlimited work orders categories and sub-types (e.g., street, sewer, facilities, landscape, etc.).							
Work Order & Asset Mgmt	1.002	AGENCY-DEFINED FIELDS BY WORK ORDER TYPE - Ability to set up any type of work order with "unlimited" agency-defined fields by work order type (e.g., Meter Repairs, Hydrant Flush, Valve Turning, Manhole Inspections, lift station inspections, etc.)							
Work Order & Asset Mgmt	1.003	AGENCY-DEFINED FIELDS - MOBILE - Ability to view agency-defined fields from the mobile application.							
Work Order & Asset Mgmt	1.004	SERVICE/"WORK REQUEST" FIELDS - Ability to track the following fields, at minimum, for any work request:							
Work Order & Asset Mgmt	1.005	▪ Corrective Type Requested							
Work Order & Asset Mgmt	1.006	▪ Standard Description							
Work Order & Asset Mgmt	1.007	▪ Priority							
Work Order & Asset Mgmt	1.008	▪ Date							
Work Order & Asset Mgmt	1.009	▪ Requestor Type (Employee, Customer, Business)							
Work Order & Asset Mgmt	1.010	▪ Requestor Employee Department							
Work Order & Asset Mgmt	1.011	▪ Requestor Employee Number							
Work Order & Asset Mgmt	1.012	▪ Requestor Name							
Work Order & Asset Mgmt	1.013	▪ Requestor Address							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.014	▪ Requestor Home Phone							
Work Order & Asset Mgmt	1.015	▪ Requestor Work Phone							
Work Order & Asset Mgmt	1.016	▪ Requestor Cell Phone							
Work Order & Asset Mgmt	1.017	▪ Requestor Email Address							
Work Order & Asset Mgmt	1.018	▪ Work Request Number							
Work Order & Asset Mgmt	1.019	▪ Completed/Closed Date							
Work Order & Asset Mgmt	1.020	▪ Location (if different than address)							
Work Order & Asset Mgmt	1.021	▪ Detailed Description							
Work Order & Asset Mgmt	1.022	▪ Corrective Type Initial Review							
Work Order & Asset Mgmt	1.023	▪ Date Assigned							
Work Order & Asset Mgmt	1.024	▪ Assigned To							
Work Order & Asset Mgmt	1.025	▪ Initial Action Taken							
Work Order & Asset Mgmt	1.026	▪ Follow-Up Required							
Work Order & Asset Mgmt	1.027	▪ Assigned to/Call #							
Work Order & Asset Mgmt	1.028	▪ WO Date							
Work Order & Asset Mgmt	1.029	▪ WO Number							
Work Order & Asset Mgmt	1.030	▪ Follow-Up Action Taken							
Work Order & Asset Mgmt	1.031	▪ Follow-Up Completion Date							
Work Order & Asset Mgmt	1.032	▪ Requestor Notified							
Work Order & Asset Mgmt	1.033	▪ Requestor Notification Date							
Work Order & Asset Mgmt	1.034	▪ Requestor Notification Performed By							
Work Order & Asset Mgmt	1.035	▪ Reviewed By							
Work Order & Asset Mgmt	1.036	▪ Reviewed By Date							
Work Order & Asset Mgmt	1.037	WORK REQUEST - Ability to require work request for certain work order types and not be required for other work order types.							
Work Order & Asset Mgmt	1.038	WORK REQUEST - Ability for citizens to submit work requests via an Internet Portal.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.039	REQUEST TO WORK ORDER - Ability to convert a work request to a work order.							
Work Order & Asset Mgmt	1.040	SERVICE REQUEST SOURCE - Ability to record the source of a service request (e.g., telephone, email, etc.)							
Work Order & Asset Mgmt	1.041	TRACKING SERVICE REQUESTS - Ability to produce a list of service requests by individual requesting the work (e.g., All service requests by person).							
Work Order & Asset Mgmt	1.042	EMAIL LETTERS BASED ON SERVICE REQUEST FOLLOW-UP - Ability to generate a service request follow-up email to the citizens who submitted the request when the service requests and/or work orders are closed.							
Work Order & Asset Mgmt	1.043	WORK ORDER TYPES - Ability to generate the following work order types:							
Work Order & Asset Mgmt	1.044	▪ Easement Cleaning							
Work Order & Asset Mgmt	1.045	▪ Lift station Reads and Maintenance							
Work Order & Asset Mgmt	1.046	▪ Line Blockages							
Work Order & Asset Mgmt	1.047	▪ Line Cleans							
Work Order & Asset Mgmt	1.048	▪ Dig Alerts - Mark outs							
Work Order & Asset Mgmt	1.049	▪ Sewer System Overflows							
Work Order & Asset Mgmt	1.050	▪ Video Tap Lines							
Work Order & Asset Mgmt	1.051	▪ Manhole Inspections							
Work Order & Asset Mgmt	1.052	▪ Valves inspections and repairs							
Work Order & Asset Mgmt	1.053	▪ Pump Oil Changes							
Work Order & Asset Mgmt	1.054	▪ Pump and motor repairs and maintenance							
Work Order & Asset Mgmt	1.055	▪ Pump, motor, and tank inspections							
Work Order & Asset Mgmt	1.056	▪ Utility (e.g., Sewer, Storm drain)							
Work Order & Asset Mgmt	1.057	▪ Building Facilities Maintenance							
Work Order & Asset Mgmt	1.058	WORK ORDER FIELDS - Ability to track, at a minimum, the following fields for any work order:							
Work Order & Asset Mgmt	1.059	▪ Work Order Number							
Work Order & Asset Mgmt	1.060	▪ Asset Number							
Work Order & Asset Mgmt	1.061	▪ Asset Location							
Work Order & Asset Mgmt	1.062	▪ Asset "Short" Description							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.063	▪ Asset "Long" Description							
Work Order & Asset Mgmt	1.064	▪ Asset Serial Number							
Work Order & Asset Mgmt	1.065	▪ Originator							
Work Order & Asset Mgmt	1.066	▪ Project Number							
Work Order & Asset Mgmt	1.067	▪ Work Group (division and section within Public Works)							
Work Order & Asset Mgmt	1.068	▪ Assigned To							
Work Order & Asset Mgmt	1.069	▪ Authorized By							
Work Order & Asset Mgmt	1.070	▪ Address							
Work Order & Asset Mgmt	1.071	▪ Location							
Work Order & Asset Mgmt	1.072	▪ Zones/Area							
Work Order & Asset Mgmt	1.073	▪ Origination Date & Time							
Work Order & Asset Mgmt	1.074	▪ Due Date & Time							
Work Order & Asset Mgmt	1.075	▪ Schedule Start Date							
Work Order & Asset Mgmt	1.076	▪ Schedule Finish Date							
Work Order & Asset Mgmt	1.077	▪ Start Date							
Work Order & Asset Mgmt	1.078	▪ Completion Date							
Work Order & Asset Mgmt	1.079	▪ Labor Hours by work step							
Work Order & Asset Mgmt	1.080	▪ Down Time							
Work Order & Asset Mgmt	1.081	▪ Condition							
Work Order & Asset Mgmt	1.082	▪ Severity							
Work Order & Asset Mgmt	1.083	▪ Work Category (Concrete, Asphalt, etc...)							
Work Order & Asset Mgmt	1.084	▪ Work Type (e.g., planned, non-emergency, emergency, stand-by, corrective, preventative, predicted maintenance, unscheduled)							
Work Order & Asset Mgmt	1.085	▪ Status							
Work Order & Asset Mgmt	1.086	▪ Work Requested Description/Activity							
Work Order & Asset Mgmt	1.087	▪ Total Estimated Cost							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.088	▪ Completed By							
Work Order & Asset Mgmt	1.089	▪ Labor Employee							
Work Order & Asset Mgmt	1.090	▪ Labor Total Hours							
Work Order & Asset Mgmt	1.091	▪ Labor Overtime Hours							
Work Order & Asset Mgmt	1.092	▪ Labor Work Date							
Work Order & Asset Mgmt	1.093	▪ Hourly Labor Cost							
Work Order & Asset Mgmt	1.094	▪ Total Labor Cost							
Work Order & Asset Mgmt	1.095	▪ Material Stock Number							
Work Order & Asset Mgmt	1.096	▪ Material Description							
Work Order & Asset Mgmt	1.097	▪ Material Required Quantity							
Work Order & Asset Mgmt	1.098	▪ Material Actual Quantity							
Work Order & Asset Mgmt	1.099	▪ Material Date Used							
Work Order & Asset Mgmt	1.100	▪ Material Total Unit Cost							
Work Order & Asset Mgmt	1.101	▪ Material Total Cost							
Work Order & Asset Mgmt	1.102	▪ Equipment Code							
Work Order & Asset Mgmt	1.103	▪ Equipment Description							
Work Order & Asset Mgmt	1.104	▪ Equipment Required Quantity							
Work Order & Asset Mgmt	1.105	▪ Equipment Actual Quantity							
Work Order & Asset Mgmt	1.106	▪ Equipment Date Used							
Work Order & Asset Mgmt	1.107	▪ Equipment Total Unit Cost							
Work Order & Asset Mgmt	1.108	▪ Equipment Usage Total Cost							
Work Order & Asset Mgmt	1.109	▪ Task Description							
Work Order & Asset Mgmt	1.110	▪ Task Instructions							
Work Order & Asset Mgmt	1.111	▪ Comments							
Work Order & Asset Mgmt	1.112	EXPIRED ASSETS - Maintain Expired Assets and all related historical information							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.113	OUT OF SERVICE/INACTIVE STATUS - Allow for Assets to have an "out of service" or "inactive" status without being Expired							
Work Order & Asset Mgmt	1.114	DETERMINE REQUIRED FIELDS - Ability for Agency to determine which fields are required for each work order type.							
Work Order & Asset Mgmt	1.115	REQUESTOR STATUS UPDATE - Ability to include the following information as part of a requestor work order status update:							
Work Order & Asset Mgmt	1.116	▪ Work Order #							
Work Order & Asset Mgmt	1.117	▪ Location							
Work Order & Asset Mgmt	1.118	▪ Type							
Work Order & Asset Mgmt	1.119	▪ Description							
Work Order & Asset Mgmt	1.120	▪ Status							
Work Order & Asset Mgmt	1.121	▪ Comments							
Work Order & Asset Mgmt	1.122	MULTIPLE CREW MEMBER HOURS ON WORK ORDER - Ability for technicians to enter hours for multiple crew members on a work order based on actual burdened cost.							
Work Order & Asset Mgmt	1.123	WORK ORDER INITIATION - Ability to initiate a work order directly from:							
Work Order & Asset Mgmt	1.124	▪ The Work Request Screen (Converting from a Service/Work Request)							
Work Order & Asset Mgmt	1.125	▪ The Work Order Screen							
Work Order & Asset Mgmt	1.126	▪ Selecting a location from the GIS Map							
Work Order & Asset Mgmt	1.127	▪ Selecting an asset from the GIS Map							
Work Order & Asset Mgmt	1.128	▪ The Asset Record							
Work Order & Asset Mgmt	1.129	COPYING WORK ORDERS - Ability to create a new work order by copying an existing work order.							
Work Order & Asset Mgmt	1.130	RELATED WORK ORDERS - Ability for the system to identify work orders that are related (i.e., parent-child/sub-work orders).							
Work Order & Asset Mgmt	1.131	MULTIPLE GL ACCOUNTS BY WO - Ability to use multiple general ledger account numbers per work order							
Work Order & Asset Mgmt	1.132	AGENCY-DEFINED STATUS - Ability to define unlimited work order status codes by Work Order type and progression (e.g., initiated, in progress, on hold, pending parts, etc.).							
Work Order & Asset Mgmt	1.133	MASS GROUPING - Ability to group unlimited assets in one work order and open/close in mass (e.g., flushing all sewer lines or hydrants by area.)							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.134	MASS GROUP RECORDING - Ability to record details on multiple assets in a single work order (e.g., asset inspections, pump flow times, electric meter reads, etc.)							
Work Order & Asset Mgmt	1.135	MULTIPLE WORK ORDER ACTIVITIES - Ability to establish multiple "activities" within a single work order with separate labor, intervals, equipment usage.							
Work Order & Asset Mgmt	1.136	STANDARD PARTS - Ability to setup standard parts required by work order type and specific asset (e.g., infrastructure asset).							
Work Order & Asset Mgmt	1.137	MULTIPLE WORK ORDER ACTIVITIES BY ASSET - Ability to establish multiple "activities" within a work order by asset (i.e., performing preventative maintenance on a group of assets and one requiring repairs).							
Work Order & Asset Mgmt	1.138	PROJECT WORK ORDERS - Ability to track all project-related work orders and costs (e.g., subdivision, construction project, community festivals, valve turns, hydrant flushing, lift inspection, etc.)							
Work Order & Asset Mgmt	1.139	SPLIT WORK ORDER COSTS - Ability to distribute labor and materials equally across multiple assets on the work order (e.g., valve replacements in an area).							
Work Order & Asset Mgmt	1.140	STANDARD TASKS - Ability to setup standard tasks, requirements, and notes by work order type.							
Work Order & Asset Mgmt	1.141	WORK ORDER ASSIGNMENT - Ability to assign work orders to individuals, multiple individuals, crews or vendors.							
Work Order & Asset Mgmt	1.142	CREATE WORKFLOW - Provide workflow for the process of work order initiation, resource assignment, additional materials and equipment, work scheduling, reporting, and data entry verification.							
Work Order & Asset Mgmt	1.143	ONLINE WORK REQUEST APPROVAL - Ability for an internal department online work request to be approved by the department head before being automatically routed to Public Works.							
Work Order & Asset Mgmt	1.144	ROUTING WORKFLOW - Ability for work order to auto-route to appropriate division as tasks are completed.							
Work Order & Asset Mgmt	1.145	MULTI-DIVISION ASSIGNMENTS - Ability to assign additional sub tasks/work orders to active/open work orders and assign to multiple divisions.							
Work Order & Asset Mgmt	1.146	EMAIL NOTIFICATION LINKS - Ability to email work order assignment notification with link to work order record.							
Work Order & Asset Mgmt	1.147	EMAIL WORK ORDER TO CONTRACTOR - Ability to email a specific completed inspection work order form/report to a contractor.							
Work Order & Asset Mgmt	1.148	REASSIGN - Ability to reassign open work orders to other persons and divisions without creating a new work order.							
Work Order & Asset Mgmt	1.149	ONE TIME FEES - Ability to apply miscellaneous one time account fees.							
Work Order & Asset Mgmt	1.150	EXTERNAL BILLING - Ability to invoice all costs to external party (e.g., invoice for property damage) and track payments using specific general ledger codes.							
Work Order & Asset Mgmt	1.151	INTERNAL BILLING - Ability to track all costs for work orders that will be billed back to other departments using specific general ledger codes.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.152	REAL-TIME UPDATE - Provide real-time updates to work orders for all work order entry information (e.g., tasks completed, labor, materials, equipment, etc.) whether or not the work order is completed.							
Work Order & Asset Mgmt	1.153	CALC RESPONSE & RESOLUTION TIME - Provide auto-calculation of work order resolution and response times, excluding on-hold time (e.g., waiting for parts).							
Work Order & Asset Mgmt	1.154	OUTSOURCED WORK - Ability to set up work orders and track costs for outsourced work by vendor.							
Work Order & Asset Mgmt	1.155	ON HOLD - Ability to put a work order on hold and require a reason.							
Work Order & Asset Mgmt	1.156	REMINDERS - Ability to generate reminders for work orders that are pending or on hold.							
Work Order & Asset Mgmt	1.157	CHANGE CLOSED WORK ORDER - Ability to adjust work order resources after work order has been completed or closed.							
Work Order & Asset Mgmt	1.158	REPAIR ORDERS - Ability to generate repair work orders from inspection results.							
Work Order & Asset Mgmt	1.159	CLASSIFICATION BY FACILITY/AREA - Ability to classify work orders by facility/area.							
Work Order & Asset Mgmt	1.160	ASSET WORK ORDER - Ability to process a work order without having to know the actual asset number (e.g., fix a manhole cover by type of activity even if the asset is not in the system.)							
Work Order & Asset Mgmt	1.161	ENTRY OF REPORTED WORK - Ability to enter time by work order screen or Time Entry module. Vendors, please describe any limitations.							
Work Order & Asset Mgmt	1.162	STANDARD BILLS OF MATERIAL - Ability to have standard bills of material (item, quantity, and price) detailed in a work order by type.							
Work Order & Asset Mgmt	1.163	ATTACHMENTS - Ability to attach scanned documents, files, digital photos, etc., to a work order (e.g., backflow preventer tests, inspections, generator PMs, etc.).							
Work Order & Asset Mgmt	1.164	FREE-FORM COMMENTS - Ability to enter "unlimited" free-form comments to work order and maintenance records.							
Work Order & Asset Mgmt	1.165	EQUIPMENT RENTAL - Ability to enter equipment rental usage that is reflected in hours/rates.							
Work Order & Asset Mgmt	1.166	WORK ORDER COMPLETION - Capture work order completion data, including:							
Work Order & Asset Mgmt	1.167	▪ When completed							
Work Order & Asset Mgmt	1.168	▪ Hours to complete							
Work Order & Asset Mgmt	1.169	▪ Inventory parts used							
Work Order & Asset Mgmt	1.170	▪ Problems encountered							
Work Order & Asset Mgmt	1.171	▪ Employee/division identification							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.172	BURDEN RATES - Ability to cost work orders using user burden or overhead rates.							
Work Order & Asset Mgmt	1.173	EMPLOYEE LABOR RATE - Ability to use a standard rate labor charge or the employee's actual pay rate.							
Work Order & Asset Mgmt	1.174	FULLY BURDENED COST RECOVERY - Ability to pass the captured costs of work order to internal or external parties.							
Work Order & Asset Mgmt	1.175	OUTSTANDING SERVICE REQUEST/WORK ORDER - At data entry time, provide system alert of any other outstanding service requests or work orders for the same location or same asset.							
Work Order & Asset Mgmt	1.176	ISSUE INVENTORY TO WORK ORDER - Ability to issue parts from inventory in the work order screen or to a work order from the inventory screen.							
Work Order & Asset Mgmt	1.177	ISSUE NON-INVENTORY ITEMS - Ability to add non-inventory parts to a work order.							
Work Order & Asset Mgmt	1.178	LOCATION - Ability for a work order location to be a street segment and range of addresses (e.g., 100-600 blocks of Bennett Street).							
Work Order & Asset Mgmt	1.179	MOBILE ACCESS - Ability to use mobile devices in the field, with real-time access to view, open, and update work orders. Vendors, please describe how this can be accomplished in the comments column.							
Work Order & Asset Mgmt	1.180	MOBILE ATTACHMENTS - Ability to take photos on a mobile device, and have photos attach to the work order with a time stamp.							
Work Order & Asset Mgmt	1.181	USAGE RATE EFFECTIVE DATES - Ability to set effective dates of labor and equipment usage rates.							
Work Order & Asset Mgmt	1.182	ADDRESS - Ability for the system to indicate if address is not within the Agency's boundaries.							
Work Order & Asset Mgmt	1.183	ASSIGNED ASSET AND WORK ORDERS - Ability to assign assets and Work Orders to a service area.							
Work Order & Asset Mgmt	1.184	INQUIRIES & REPORTS							
Work Order & Asset Mgmt	1.185	LANDSCAPE MAINTENANCE DISTRICT REPORT - Ability to produce a periodic report by zones, detailing landscape maintenance activities and costs.							
Work Order & Asset Mgmt	1.186	WORK REQUEST TYPE - Ability to track number of work requests by type (originator, department, citizen, etc.).							
Work Order & Asset Mgmt	1.187	WORK ORDER INQUIRY - Ability to display service request/work order information online including the status and all detail-related information in order to answer customer inquiries about a service request.							
Work Order & Asset Mgmt	1.188	WORK ORDER INQUIRY - Ability to access a work order by asset part number, location, address, activity code, crew assigned, department assigned to, date, date resolved, work order number, etc.							
Work Order & Asset Mgmt	1.189	DIVISION WORK ORDERS - Ability to display work orders by division within status.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.190	ASSIGNED WORK ORDERS - Ability to display work orders by assigned employee.							
Work Order & Asset Mgmt	1.191	PENDING VENDOR WORK ORDERS - Ability to display work orders pending vendor assignment.							
Work Order & Asset Mgmt	1.192	SCHEDULING WORK ORDERS - Ability to view employee activity calendar.							
Work Order & Asset Mgmt	1.193	OVERDUE PREVENTATIVE MAINTENANCE - Ability to report on overdue Preventative Maintenance work orders.							
Work Order & Asset Mgmt	1.194	ASSETS WITH HIGH ANNUAL MAINTENANCE - Ability to generate report of assets that have a considerable amount of maintenance scheduled per year (e.g., maintenance which should be normally once per year has been scheduled three or more time for the year).							
Work Order & Asset Mgmt	1.195	WORK ORDER BY PRIORITY - CRITICAL - Ability to generate a report of work orders that are prioritized as critical (high) by location.							
Work Order & Asset Mgmt	1.196	WORK ORDERS AWAITING PARTS - Ability to generate list of work orders awaiting parts.							
Work Order & Asset Mgmt	1.197	EMPLOYEE AVAILABLE/UNAVAILABLE TIME - Ability to track when an employee is available to be assigned to a work order.							
Work Order & Asset Mgmt	1.198	TRACK/REPORT ON MULTIPLE ASSETS ON WORK ORDER - Ability to track and report on multiple specific assets on a single work order, but still inquire/report what details on the work order is specific to each asset (e.g. change bulbs on 20 street lights, all with different ID's and be able to track and report on each ID separately).							
Work Order & Asset Mgmt	1.199	PREVENTATIVE MAINTENANCE (PM)							
Work Order & Asset Mgmt	1.200	PM TYPES - Provide unlimited types of preventative maintenance work orders.							
Work Order & Asset Mgmt	1.201	PM SCHEDULE ZONE - Provide unlimited types of preventative maintenance zones by work type.							
Work Order & Asset Mgmt	1.202	PREVENTATIVE MAINTENANCE TRIGGERS - Ability to automatically generate a preventative maintenance work order by using the following triggers:							
Work Order & Asset Mgmt	1.203	▪ Mileage							
Work Order & Asset Mgmt	1.204	▪ Days since last PM							
Work Order & Asset Mgmt	1.205	▪ Hours							
Work Order & Asset Mgmt	1.206	▪ Readings							
Work Order & Asset Mgmt	1.207	▪ Frequency of Usage							
Work Order & Asset Mgmt	1.208	PM SOPs - Ability to maintain, attach, and retrieve Standard Operating Procedures (SOPs) for work orders.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.209	FORM ATTACHMENT - Ability to attach inspection forms to the work order record.							
Work Order & Asset Mgmt	1.210	ASSET ATTACHMENTS - Ability to retrieve documentation related to an asset for a work order.							
Work Order & Asset Mgmt	1.211	PM FIELDS - Provide the following fields in addition to the work order fields:							
Work Order & Asset Mgmt	1.212	▪ Frequency Code							
Work Order & Asset Mgmt	1.213	▪ Last PM Date							
Work Order & Asset Mgmt	1.214	▪ Reason Created							
Work Order & Asset Mgmt	1.215	PM PROJECTS - Ability to setup preventative maintenance projects and track multiple work orders per preventative maintenance project.							
Work Order & Asset Mgmt	1.216	PM INTERVALS - Ability to schedule PMs for any agency-defined interval (e.g., seasonal, twice a week, twice a month, every two weeks, monthly, daily, every three years, etc.)							
Work Order & Asset Mgmt	1.217	MAINTENANCE OF EQUIPMENT'S COMPONENTS - Ability to maintain individual equipment and equipment component maintenance schedules.							
Work Order & Asset Mgmt	1.218	SUGGEST REPLACEMENT PARTS ON WORK ORDERS - Ability to maintain and suggest parent equipment and equipment component replacement parts.							
Work Order & Asset Mgmt	1.219	PREVENTATIVE MAINTENANCE INSTRUCTIONS AND GENERAL COMMENTS - Ability to associate preventive maintenance instructions, equipment recommended parts list, maintenance schedules, and general comments to work orders.							
Work Order & Asset Mgmt	1.220	MAINTENANCE TRACKING - Ability to track maintenance activity and costs related to infrastructure, facilities, and equipment (water lines, pumps, equipment, autos, facilities, lift stations, landscaping, etc.)							
Work Order & Asset Mgmt	1.221	AUTOMATICALLY GENERATE PREVENTATIVE MAINTENANCE PARTS REQUISITION - Ability to generate a requisition for required preventative maintenance parts (e.g. Belts for HVAC, etc.)							
Work Order & Asset Mgmt	1.222	PREVENTATIVE MAINTENANCE SCHEDULING - Ability to schedule preventative maintenance by target month.							
Work Order & Asset Mgmt	1.223	PREVENTATIVE MAINTENANCE SCHEDULING - Ability for system to auto schedule next preventative maintenance inspection (e.g., 12 months from last completed inspection).							
Work Order & Asset Mgmt	1.224	PREVENTATIVE MAINTENANCE COMPLETED DATE - Ability to track actual date preventative maintenance was completed.							
Work Order & Asset Mgmt	1.225	INFRASTRUCTURE ASSETS							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.226	AGENCY-DEFINED ASSET CLASSES AND ATTRIBUTES -Provide agency-defined standard descriptions for infrastructure classes, sub-classes, and functions (e.g., water lines, sanitary sewer lines, storm sewer lines, pavement, sidewalks, hydrants, curb and gutter, etc.)							
Work Order & Asset Mgmt	1.227	AGENCY-DEFINED FIELDS BY ASSET TYPE -Ability to create unlimited agency-defined fields by Asset Type (e.g., building, floors, elevator, hydrants, lift stations, vehicles, equipment, etc.)							
Work Order & Asset Mgmt	1.228	MULTIPLE ASSET TYPES BY WORK ORDER -Ability to create a work order that contains multiple asset types.							
Work Order & Asset Mgmt	1.229	ASSET FIELDS - Ability to provide and maintain the following infrastructure asset information, including, but not limited to:							
Work Order & Asset Mgmt	1.230	▪ Asset Name							
Work Order & Asset Mgmt	1.231	▪ Asset ID Number							
Work Order & Asset Mgmt	1.232	▪ Asset Type							
Work Order & Asset Mgmt	1.233	▪ Department							
Work Order & Asset Mgmt	1.234	▪ Division							
Work Order & Asset Mgmt	1.235	▪ Short Description							
Work Order & Asset Mgmt	1.236	▪ Long Description							
Work Order & Asset Mgmt	1.237	▪ Notes							
Work Order & Asset Mgmt	1.238	▪ Size							
Work Order & Asset Mgmt	1.239	▪ Length							
Work Order & Asset Mgmt	1.240	▪ Age (calculated)							
Work Order & Asset Mgmt	1.241	▪ Value							
Work Order & Asset Mgmt	1.242	▪ Prior inspection date							
Work Order & Asset Mgmt	1.243	▪ Prior inspection results							
Work Order & Asset Mgmt	1.244	▪ Prior Defects							
Work Order & Asset Mgmt	1.245	▪ Condition Description							
Work Order & Asset Mgmt	1.246	▪ Condition Rating							
Work Order & Asset Mgmt	1.247	▪ Parent Asset Name							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.248	▪ Parent Assembly ID Number							
Work Order & Asset Mgmt	1.249	▪ Sub-Assets List							
Work Order & Asset Mgmt	1.250	▪ Associated Assets (upstream and downstream assets)							
Work Order & Asset Mgmt	1.251	▪ Geo Coordinates (Longitude/Latitude/Elevation)							
Work Order & Asset Mgmt	1.252	▪ Physical Location Address Street Number							
Work Order & Asset Mgmt	1.253	▪ Physical Location Address Street Number Suffix							
Work Order & Asset Mgmt	1.254	▪ Physical Location Address Street Prefix							
Work Order & Asset Mgmt	1.255	▪ Physical Location Address Street Name							
Work Order & Asset Mgmt	1.256	▪ Physical Location Address Street Suffix							
Work Order & Asset Mgmt	1.257	▪ Physical Location Address Sub-Detail							
Work Order & Asset Mgmt	1.258	▪ Physical Location Address City							
Work Order & Asset Mgmt	1.259	▪ Physical Location Address State							
Work Order & Asset Mgmt	1.260	▪ Physical Location Address Zip (5)							
Work Order & Asset Mgmt	1.261	▪ Building							
Work Order & Asset Mgmt	1.262	▪ Floor							
Work Order & Asset Mgmt	1.263	▪ Room							
Work Order & Asset Mgmt	1.264	▪ Area							
Work Order & Asset Mgmt	1.265	▪ Sub-Area							
Work Order & Asset Mgmt	1.266	▪ Drawing Reference							
Work Order & Asset Mgmt	1.267	▪ Date Assigned							
Work Order & Asset Mgmt	1.268	▪ Project/Program Number							
Work Order & Asset Mgmt	1.269	▪ Acquisition Date							
Work Order & Asset Mgmt	1.270	▪ Installation Date							
Work Order & Asset Mgmt	1.271	▪ Initial Cost							
Work Order & Asset Mgmt	1.272	▪ Expected Life							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.273	PRE-CONFIGURED ASSET FIELDS - System to be delivered with pre-figured fields for the following asset types:							
Work Order & Asset Mgmt	1.274	▪ Sewer: mains, manholes, service lines, nodes, lift stations							
Work Order & Asset Mgmt	1.275	▪ Electric: wire, poles, transformers, etc.							
Work Order & Asset Mgmt	1.276	▪ Plant: facilities, equipment, vehicles, reservoirs, pumps, motors							
Work Order & Asset Mgmt	1.277	▪ Customer Service: service request management							
Work Order & Asset Mgmt	1.278	INFRASTRUCTURE NETWORKS - Ability to fully define infrastructure networks. In the case of a water system, this includes all pipes, valves, manholes, storage facilities, filter plants, etc.							
Work Order & Asset Mgmt	1.279	INFRASTRUCTURE NETWORKS ASSET ASSOCIATIONS -Ability to indicate upstream and downstream asset associations (e.g., lateral connections to a main, a main attached to a valve, etc.)							
Work Order & Asset Mgmt	1.280	MASTER ASSET - SUB-ASSET LISTING -Ability to view a listing of all sub-assets (children) that are associated with a master asset (parent).							
Work Order & Asset Mgmt	1.281	MASTER ASSET - ACCUMLULATED COST -Ability to see overall costs associated with a master asset (parent), including the cost of the sub-assets (children).							
Work Order & Asset Mgmt	1.282	INFRASTRUCTURE MATERIALS -Ability to fully define the materials within the infrastructure (e.g., type of pipe, length, flow rates, estimated life, etc.)							
Work Order & Asset Mgmt	1.283	INFRASTRUCTURE RUN TIMES - Ability to log run times (hours, units, flow, etc.) on plant equipment as inspected.							
Work Order & Asset Mgmt	1.284	CONDITION RATING - Ability to establish condition ratings for each infrastructure asset segment.							
Work Order & Asset Mgmt	1.285	GEOGRAPHIC CLASSIFICATION OF INFRASTRUCTURE -Ability to group infrastructure assets by agency-defined geographic areas.							
Work Order & Asset Mgmt	1.286	GEOGRAPHIC CLASSIFICATION OF INFRASTRUCTURE -Ability to have unlimited geographic area classifications by location.							
Work Order & Asset Mgmt	1.287	LONGEVITY - Ability to determine how long certain commodities such as light bulbs are lasting once installed.							
Work Order & Asset Mgmt	1.288	ATTACHMENTS - Ability to attach documents and pictures to the asset record.							
Work Order & Asset Mgmt	1.289	ATTACHMENTS - WORK ORDER - Ability to retrieve images and documents stored at the asset record from the work order screen.							
Work Order & Asset Mgmt	1.290	WORK ORDER HISTORY - Ability to click into work order history by type of material or equipment at a summary and detail level, including the ability to see location.							
Work Order & Asset Mgmt	1.291	WORK ORDER HISTORY BY ASSET - Ability to generate work order history by asset.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.292	WORK ORDER HISTORY - COSTS BY ASSET - Ability to generate work order cost summary reports by asset.							
Work Order & Asset Mgmt	1.293	ACTUAL VS PLANNED COMPARISONS -Ability to generate a comparison report for planned versus actual work completed.							
Work Order & Asset Mgmt	1.294	NOTIFICATIONS FOR ABNORMAL READINGS -Ability to automatically notify staff when readings collected reach a specific point (e.g. a motor rated for 2.1 amps at full load had an amp reading of 3.0 amps entered).							
Work Order & Asset Mgmt	1.295	TRACK INTERVAL ASSET FAILURES -Provide a method for tracking the time interval between failure of any an asset by failure code.							
Work Order & Asset Mgmt	1.296	TRACK ASSET FAILURES -Provide a method for tracking all asset failures in general.							
Work Order & Asset Mgmt	1.297	LABOR HOURS BY WORK ORDER TYPE - Ability to track maintenance labor hours by work order type.							
Work Order & Asset Mgmt	1.298	INTEGRATION & INTERFACES							
Work Order & Asset Mgmt	1.299	INTEGRATION - GENERAL LEDGER - Ability to integrate with the General Ledger.							
Work Order & Asset Mgmt	1.300	INTEGRATION – PROJECT ACCOUNTING - Provide integration with Project Accounting.							
Work Order & Asset Mgmt	1.301	INTEGRATION – ACCOUNTS RECEIVABLE - Ability to integrate the Maintenance Management/Work Order System with Accounts Receivable for charging efforts to external customers.							
Work Order & Asset Mgmt	1.302	INTEGRATION – FIXED ASSETS - Ability for work order costs to be part of a fixed asset's cost.							
Work Order & Asset Mgmt	1.303	INTEGRATION – ASSET INVENTORY - Ability to integrate with the Asset Inventory.							
Work Order & Asset Mgmt	1.304	INTERFACE - CIS & UTILITY BILLING - Provide interface with CIS & Utility Billing service orders.							
Work Order & Asset Mgmt	1.305	INTEGRATION - CRM - Provide integration with the Customer Request Management system.							
Work Order & Asset Mgmt	1.306	INTEGRATION - TIME KEEPING - Ability for work order time to be entered in the Time Entry system and automatically update the work order detail							
Work Order & Asset Mgmt	1.307	INTEGRATION – INVENTORY - Ability to integrate with the Inventory to update inventory items used on work orders.							
Work Order & Asset Mgmt	1.308	INTEGRATION - BARCODE SCANNER - ASSET - Ability to integrate with barcode scanners to scan and retrieve an asset for a work order.							
Work Order & Asset Mgmt	1.309	INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM - System must integrate with Electronic Content Management System (To Be Determined) .							
Work Order & Asset Mgmt	1.310	INTEGRATION - ACCOUNTS PAYABLE - Ability for Work Orders to integrate with Accounts Payable in order to include a Work Order Number on Receipt/Invoice.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.311	GIS INTEGRATION							
Work Order & Asset Mgmt	1.312	INTEGRATION - ESRI ARCGIS - Ability to interface with Esri ArcGIS (Agency to insert SOFTWARE NAME and VERSION #) to address GIS integration features discussed in this section.							
Work Order & Asset Mgmt	1.313	WORK ORDER - AUTO-POPULATE FROM GIS - Ability for the system to integrate with GIS in order to retrieve the following Work Order information:							
Work Order & Asset Mgmt	1.314	▪ Geo Location related to a work order							
Work Order & Asset Mgmt	1.315	▪ Asset Name							
Work Order & Asset Mgmt	1.316	▪ Asset ID							
Work Order & Asset Mgmt	1.317	▪ Other Asset Attributes Stored in GIS (e.g., size, inspection results, condition rating, etc.)							
Work Order & Asset Mgmt	1.318	GIS/MAPPING - Ability to select an asset or a group of assets from a GIS map and drill-down to the asset or activity information (e.g., select asset and drill down to view work orders related to the asset							
Work Order & Asset Mgmt	1.319	GIS/MAPPING - WO MAP ROUTING - Ability to generate a map of work orders and provide a suggested route for completing them.							
Work Order & Asset Mgmt	1.320	GIS/MAPPING - Ability to use GIS mapping to view:							
Work Order & Asset Mgmt	1.321	▪ Work Order Types							
Work Order & Asset Mgmt	1.322	▪ Work Order Status							
Work Order & Asset Mgmt	1.323	▪ Work Order Priority							
Work Order & Asset Mgmt	1.324	▪ Work Orders by Asset							
Work Order & Asset Mgmt	1.325	▪ Work Orders by Asset Types							
Work Order & Asset Mgmt	1.326	▪ Asset Age							
Work Order & Asset Mgmt	1.327	▪ Asset Condition Ratings							
Work Order & Asset Mgmt	1.328	MOBILE APPLICATION - Ability for the mobile application to retrieve GIS information.							
Work Order & Asset Mgmt	1.329	RADIUS SEARCHES - Ability to perform searches within a radius (e.g., work orders or assets within a given area)							
Work Order & Asset Mgmt	1.330	QUERYING DATABASE ATTRIBUTES - Provides ability to print agency-defined maps showing any queried attributes in database.							
Work Order & Asset Mgmt	1.331	POSITIONING COORDINATES - Provides location fields to identify the actual locations through the use of Geographical Positioning coordinates and Process Control Location IDs.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.332	DISPLAY MAP - WORK ORDER TYPES - Ability to color code work order types on map.							
Work Order & Asset Mgmt	1.333	DISPLAY MAP - ASSET TYPES - Ability to color code asset types on map.							
Work Order & Asset Mgmt	1.334	HEAT MAPS - The system has the ability to generate "heat-maps" on GIS mapping in order to identify areas of large work order volume.							
Work Order & Asset Mgmt	1.335	ROUTES - The system should be able to use GIS to compute inspection routes based on specific information including, but not limited to, using layers in GIS for territories.							
Work Order & Asset Mgmt	1.336	BI-DIRECTIONAL INTERFACING - The interface between the GIS and other vendor modules should be bi-directional. The ability to query, view, and interact with location data with a spatial location and display them in a GIS viewer.							
Work Order & Asset Mgmt	1.337	GIS DATA SYNCHRONIZATION - Provides ability to synchronize any changes from GIS to update related location data from vendor modules.							
Work Order & Asset Mgmt	1.338	CUES GRANITENET INTEGRATION							
Work Order & Asset Mgmt	1.339	CUES GRANITENET INTEGRATION - Ability to interface with Cues GraniteNet (Current Version 3.5) to address integration features discussed in this section.							
Work Order & Asset Mgmt	1.340	BI-DIRECTIONAL INTERFACING - The interface between Asset Management and GraniteNet modules should be bi-directional. The ability to send group projects of inspections to GraniteNet and receive the completed inspections back with ALL observation details, scores, etc. resulting from a NASSCO PACP/MACP compliant inspection.							
Work Order & Asset Mgmt	1.341	ASSETS - AUTO-POPULATE FROM Asset Management - Ability for the system to integrate with GraniteNet in order to send the following asset Information:							
Work Order & Asset Mgmt	1.342	<u>Mainlines</u>							
Work Order & Asset Mgmt	1.343	▪ Asset ID Number							
Work Order & Asset Mgmt	1.344	▪ Asset Type							
Work Order & Asset Mgmt	1.345	▪ Location Address							
Work Order & Asset Mgmt	1.346	▪ Location City							
Work Order & Asset Mgmt	1.347	▪ Shape							
Work Order & Asset Mgmt	1.348	▪ Material							
Work Order & Asset Mgmt	1.349	▪ Lining Method							
Work Order & Asset Mgmt	1.350	▪ Height							
Work Order & Asset Mgmt	1.351	▪ Length							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.352	▪ Surface Type							
Work Order & Asset Mgmt	1.353	▪ Upstream MH #							
Work Order & Asset Mgmt	1.354	▪ Depth							
Work Order & Asset Mgmt	1.355	▪ Downstream MH #							
Work Order & Asset Mgmt	1.356	▪ Depth							
Work Order & Asset Mgmt	1.357	<u>Manholes (Nodes, Access Points)</u>							
Work Order & Asset Mgmt	1.358	▪ Manhole #							
Work Order & Asset Mgmt	1.359	▪ Depth							
Work Order & Asset Mgmt	1.360	▪ Associated Assets (upstream and downstream assets)							
Work Order & Asset Mgmt	1.361	NEW INSPECTIONS - AUTO-POPULATE FROM Asset Management - Ability for the system to integrate with GraniteNet in order to send the following inspection Information:							
Work Order & Asset Mgmt	1.362	▪ Project Name (Group Project)							
Work Order & Asset Mgmt	1.363	▪ Inpsection #							
Work Order & Asset Mgmt	1.364	▪ Assigned to (employee #)							
Work Order & Asset Mgmt	1.365	▪ Asset Information							
Work Order & Asset Mgmt	1.366	▪ Inspection Type							
Work Order & Asset Mgmt	1.367	▪ Priority							
Work Order & Asset Mgmt	1.368	▪ Scheduled Date/Time							
Work Order & Asset Mgmt	1.369	▪ Comments							
Work Order & Asset Mgmt	1.370	EMPLOYEES - AUTO-POPULATE FROM Asset Management - Ability for the system to integrate with GraniteNet in order to send the following Information:							
Work Order & Asset Mgmt	1.371	▪ First Name							
Work Order & Asset Mgmt	1.372	▪ Last Name							
Work Order & Asset Mgmt	1.373	▪ Employee #							
Work Order & Asset Mgmt	1.374	▪ Certificate # (NAASCO)							
Work Order & Asset Mgmt	1.375	▪ Email							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.376	▪ Phone							
Work Order & Asset Mgmt	1.377	COMPLETED INSPECTIONS - AUTO-POPULATE FROM GraniteNet - Ability for the system to integrate with GraniteNet in order to send the following inspection Information:							
Work Order & Asset Mgmt	1.378	▪ Direction/Setup							
Work Order & Asset Mgmt	1.379	▪ Comments							
Work Order & Asset Mgmt	1.380	▪ Completed Date/Time							
Work Order & Asset Mgmt	1.381	▪ Height							
Work Order & Asset Mgmt	1.382	▪ Length							
Work Order & Asset Mgmt	1.383	▪ Pre-Cleaning							
Work Order & Asset Mgmt	1.384	▪ Surveyed By							
Work Order & Asset Mgmt	1.385	▪ Weather							
Work Order & Asset Mgmt	1.386	▪ Width							
Work Order & Asset Mgmt	1.387	▪ Priority							
Work Order & Asset Mgmt	1.388	▪ Purpose							
Work Order & Asset Mgmt	1.389	▪ Start Date/Time							
Work Order & Asset Mgmt	1.390	▪ Inspection #							
Work Order & Asset Mgmt	1.391	<u>Observation Information:</u>							
Work Order & Asset Mgmt	1.392	▪ Defect %							
Work Order & Asset Mgmt	1.393	▪ Observation Code							
Work Order & Asset Mgmt	1.394	▪ Dimension 1							
Work Order & Asset Mgmt	1.395	▪ Dimension 2							
Work Order & Asset Mgmt	1.396	▪ Position From							
Work Order & Asset Mgmt	1.397	▪ Position To							
Work Order & Asset Mgmt	1.398	▪ Distance							
Work Order & Asset Mgmt	1.399	▪ Distance 1							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Work Order & Asset Mgmt	1.400	▪ Distance 2							
Work Order & Asset Mgmt	1.401	▪ Joint Indicator							
Work Order & Asset Mgmt	1.402	▪ Rating							
Work Order & Asset Mgmt	1.403	▪ Comments							
Work Order & Asset Mgmt	1.404	DIRECT VIDEO ACCESS - Ability to pull up video directly from asset management							
Work Order & Asset Mgmt	1.405	AUTO CREATE SERVICE/WORK ORDER - Ability to analyze incoming observation information to automatically create a service request/work order							
Work Order & Asset Mgmt	1.406	IMPORTING - HISTORICAL WORK ORDERS - Ability to import historical work orders associated to assets while maintaining the capabilities of performing queries and reporting functions							
Work Order & Asset Mgmt	1.407	IMPORTING - HISTORICAL TV INSPECTIONS - Ability to import historical tv inspections associated to assets while maintaining the capabilities of performing queries and reporting functions.							

FOR REVIEW PURPOSES ONLY

Rock River Water Reclamation District - Enterprise Asset Management - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?..000) should have only one "1". Blank rows will be scored as Not Available.

Legend:

Standard - Current	Available in current software release
Standard - Next Release	Guaranteed available in next release of software
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
Application	Number	Inventory Management							
Inventory Management	2.000	GENERAL INVENTORY							
Inventory Management	2.001	INVENTORY CLASSES - Provide different classes of inventory items which include: <ul style="list-style-type: none"> ▪ Large equipment items (e.g., meters not in service, valves, pipe, wire, transformers, spare parts, etc.) in order to reduce lists of parts ▪ Replacement parts of various types ▪ Consumable items ▪ Office supplies 							
Inventory Management	2.002	INVENTORY ITEM - INFORMATION - Provide the following minimum data elements for each inventory item:							
Inventory Management	2.003	▪ Item stock number (minimum of 15 digits)							
Inventory Management	2.004	▪ Item stock name							
Inventory Management	2.005	▪ Current manufacturer part number							
Inventory Management	2.006	▪ Current manufacturer name							
Inventory Management	2.007	▪ Alternative equivalent part numbers							
Inventory Management	2.008	▪ G/L Account Number							
Inventory Management	2.009	▪ Description							
Inventory Management	2.010	▪ Location (building, yard, area, section, row, rack)							
Inventory Management	2.011	▪ Bin location (building, room, area, section, rack, shelf)							
Inventory Management	2.012	▪ On-hand quantity							
Inventory Management	2.013	▪ On-order quantity							
Inventory Management	2.014	▪ Average cost							
Inventory Management	2.015	▪ Unit cost							
Inventory Management	2.016	▪ Volume discount level							
Inventory Management	2.017	▪ Date of last issue							
Inventory Management	2.018	▪ Date of last receipt							
Inventory Management	2.019	▪ Date of last order							
Inventory Management	2.020	▪ Date of last physical count							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Inventory Management	2.021	▪ Unit of measure							
Inventory Management	2.022	▪ Reorder point							
Inventory Management	2.023	▪ Reorder quantity							
Inventory Management	2.024	▪ Date assigned							
Inventory Management	2.025	▪ Comment section (use comments to define maximum length of comment)							
Inventory Management	2.026	▪ Shelf life							
Inventory Management	2.027	▪ Vendor history - name, number and price							
Inventory Management	2.028	▪ Hazardous Material (Y/N)							
Inventory Management	2.029	AGENCY-DEFINED FIELDS FOR INVENTORY ITEMS - Ability to create agency-defined fields for inventory items.							
Inventory Management	2.030	SUPPLIERS - Ability to list suppliers with contact name, supplier number, phone, fax number, email, category, or product/service type.							
Inventory Management	2.031	INVENTORY TRANSACTION ASSIGNMENT - Ability to assign inventory to projects and/or work orders from an inventory screen.							
Inventory Management	2.032	INVENTORY TRANSACTIONS - Include, at a minimum, the following transactions:							
Inventory Management	2.033	▪ Orders							
Inventory Management	2.034	▪ Adjustments							
Inventory Management	2.035	▪ Issues							
Inventory Management	2.036	▪ Receipts							
Inventory Management	2.037	▪ Returns							
Inventory Management	2.038	▪ Location Transfers							
Inventory Management	2.039	▪ Blanket purchase orders							
Inventory Management	2.040	UNIT OF MEASURE - Allow user-defined codes for unit of measure.							
Inventory Management	2.041	PURCHASING / DISTRIBUTION UNIT OF MEASURE - Provide distinction of purchasing unit of measure and distribution unit of measure.							
Inventory Management	2.042	DO NOT REORDER FLAG - Ability to flag an item as "do not reorder".							
Inventory Management	2.043	MULTIPLE WAREHOUSE/YARD AND BIN/RACK STORAGE LOCATIONS - Ability to track inventory in multiple warehouses, yards, and bin/rack locations (e.g., main stores and on trucks).							
Inventory Management	2.044	LABELS WITH BARCODES - Ability to print bin labels with barcodes.							
Inventory Management	2.045	STORAGE LOCATION LABELS - BARCODE - Ability to generate storage location labels that include part information and a barcode.							
Inventory Management	2.046	TRANSACTION AUDIT TRAIL - Ability to log user identification (issuer and receiver), date and time of transaction, and name of requisitioner.							
Inventory Management	2.047	KITTING - Ability to kit materials such as clips, screws, and rivets for signs.							
Inventory Management	2.048	BACK ORDERS - Ability to track and report back-order items, including automatic release of back orders upon processing of receipt.							
Inventory Management	2.049	RESERVE ITEMS FOR WO - Ability to reserve stock items for open/scheduled work orders.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Inventory Management	2.050	VALUATION METHOD - Ability to select which valuation method to use (e.g. First In First Out (FIFO) Last In First Out (LIFO), Average Cost, etc.).							
Inventory Management	2.051	INVENTORY TRACKING - Ability to maintain and track inventory not owned by the Agency.							
Inventory Management	2.052	CROSS-REFERENCE LIST - Ability to provide multiple vendor part numbers cross-referenced to agency stock number.							
Inventory Management	2.053	ITEM/MATERIAL USAGE - Provide item/material usage by general ledger account.							
Inventory Management	2.054	ONLINE MATERIALS CATALOG - WAREHOUSE - Provide on-line warehouse materials catalog by description within commodity group.							
Inventory Management	2.055	ONLINE MATERIALS CATALOG - SUPPLIERS - Provide on-line suppliers catalog by description.							
Inventory Management	2	VENDOR PREFERENCE FOR ITEM - Ability to classify a vendor preference for an item.							
Inventory Management	2.057	ISSUE PARTS QUICK ENTRY - Ability to issue parts to a work order from a quick-entry inventory screen.							
Inventory Management	2.058	ISSUE PARTS FROM WORK ORDER - Ability to issue parts from the work order entry screen.							
Inventory Management	2.059	PURCHASED PARTS/MATERIAL - Ability to order parts for a specific work order and automatically apply those parts to a work order upon receipt of goods (e.g., buy at a specialty supplier).							
Inventory Management	2.060	ALPHANUMERIC PART NUMBERS - Provide alphanumeric stock and part numbers.							
Inventory Management	2.061	PLAN MATERIAL, PARTS, AND EQUIPMENT - Ability to plan/allocate material, parts, and equipment requirements for scheduled work orders.							
Inventory Management	2.062	ISSUES TO INDIVIDUALS - Ability to track uniforms, gloves, shovels, and other small supplies issued to individuals.							
Inventory Management	2.063	EQUIPMENT ISSUES - Ability to track equipment inventory issuance such as barricades, cones, temporary signs, arrow boards, hand tools, etc.							
Inventory Management	2.064	ATTACHMENTS - Ability to attach documents and pictures to the master part record.							
Inventory Management	2.065	PHYSICAL INVENTORY							
Inventory Management	2.066	PHYSICAL INVENTORY - FREEZE - Ability to freeze (no transactions) areas being counted.							
Inventory Management	2.067	CYCLE AND PHYSICAL INVENTORY - Provide both a cycle counting inventory and full or partial physical inventory capabilities.							
Inventory Management	2.068	INVENTORY COUNT/VALUE - Ability to maintain an inventory count and value by item.							
Inventory Management	2.069	PHYSICAL INVENTORY - LOG COUNT - Ability to secure and track physical count data entry.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Inventory Management	2.070	PHYSICAL INVENTORY - REPORT - Generate a report comparing physical count to actual stock levels.							
Inventory Management	2.071	PHYSICAL INVENTORY - RECOUNT - Ability to recount and enter new count for specific items.							
Inventory Management	2.072	PHYSICAL INVENTORY - ADJUSTMENTS - Upon acceptance of the physical count, adjust stock levels and update the general ledger with stock shrinkage/overage.							
Inventory Management	2.073	WAREHOUSE INVENTORY REQUISITIONS							
Inventory Management	2.074	WAREHOUSE REQUISITIONS - STATUS - Display warehouse requisitions by stock number and cost center.							
Inventory Management	2.075	WAREHOUSE REQUISITIONS - PICK TICKET - Provide a pick ticket including:							
Inventory Management	2.076	▪ Location							
Inventory Management	2.077	▪ Stock number							
Inventory Management	2.078	▪ Quantity ordered							
Inventory Management	2.079	▪ Department							
Inventory Management	2.080	▪ General ledger account number							
Inventory Management	2.081	▪ Quantity issued							
Inventory Management	2.082	▪ Quantity back ordered							
Inventory Management	2.083	▪ Computer assigned order number							
Inventory Management	2.084	▪ Date							
Inventory Management	2.085	PO NUMBER - Ability to use either a system-assigned purchase order number or a manually entered purchase order number (e.g., large purchase where purchase order number was assigned from the Finance Department) depending on the individual situation.							
Inventory Management	2.086	AGENCY-DEFINED REORDER POINTS - Allow agency-defined reorder points for individual items.							
Inventory Management	2.087	AGENCY-DEFINED EOQ VALUES - Allow agency-defined economic order quantity values to establish quantities for the best price.							
Inventory Management	2.088	AUTOMATIC REORDERING - Ability for the system to automatically initiate requisition processing of standard reorder quantities whenever inventory levels fall below agency-defined reorder points.							
Inventory Management	2.089	AUTOMATIC REORDERING - EOQ - Ability for the system to automatically determine when to re-order, based on economic order quantity.							
Inventory Management	2.090	AUTOMATIC REORDERING - SAFETY STOCK - Ability for the system to automatically determine when to re-order, based on safety stock amounts.							
Inventory Management	2.091	AUTOMATIC REORDERING - BULK ORDERS - Ability to group low priority items into bulk orders.							
Inventory Management	2.092	AUTOMATIC REORDER REQUISITION REVIEW - Ability to review a system-generated requisition before issuing, and edit as necessary.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Inventory Management	2.093	INVENTORY RECEIVING							
Inventory Management	2.094	RECEIVING INFO - Ability to capture the date, time, location, and user upon the receipt of goods.							
Inventory Management	2.095	RECEIVING - Provide receiving of inventory items. Inventory level should reflect entry of receiving documents and return of unused items to inventory.							
Inventory Management	2.096	ONE-CLICK RECEIPTS - Ability to "receive all" goods/services with one click.							
Inventory Management	2.097	"RECEIVE ALL" CONFIRMATION MESSAGE - Ability to generate a message when a user clicks to "receive all" goods/services (e.g., Confirm you want to receive all goods).							
Inventory Management	2.098	RECEIVING - ITEM PROCESSING - Provide simultaneous receiving and issuing of an item.							
Inventory Management	2.099	RECEIVING - DAMAGED GOODS - Ability to process damaged goods receipt and returns using workflow functionality.							
Inventory Management	2.1	RECEIVING - INCORRECT GOODS - Ability to process incorrect goods receipt and returns using workflow functionality.							
Inventory Management	2.101	DAMAGED/INCORRECT ITEMS EMAIL - Ability to automatically send email notifications when received items are marked as damaged or incorrect.							
Inventory Management	2.102	RETURN ISSUES - Ability to process return to stock and reversal of issue transaction.							
Inventory Management	2.103	RECEIVING - DECENTRALIZED - Ability to process decentralized receiving of goods.							
Inventory Management	2.104	ATTACH PACKING SLIP TO PO - Ability to scan and attach packing slips to purchase orders.							
Inventory Management	2.105	RECEIVING - ADD ITEMS TO WO - Ability to add items to a work order at the time of receipt.							
Inventory Management	2.106	TWO-WAY MATCH - Ability to process matching receipted item to invoice.							
Inventory Management	2.107	INQUIRY AND REPORTING							
Inventory Management	2.108	USER DASHBOARD - Provide user configurable dashboards that accesses and monitors inventory (e.g. replenishment level, templates, etc.)							
Inventory Management	2.109	INVENTORY INQUIRY - Track and inquire on inventory items by stock number, part number, description, name, class, etc.							
Inventory Management	2.110	INVENTORY REPORT - RECEIVING - Provide Inventory Receiving report.							
Inventory Management	2.111	INVENTORY REPORT - LOCATION / WAREHOUSE / YARD / BINS / RACKS - Provide inventory reporting by physical location, such as warehouses, yards and bin/rack locations.							
Inventory Management	2.112	INVENTORY REPORT - PROJECTS / WORK ORDERS - Provide inventory activity reporting by projects and work orders.							
Inventory Management	2.113	INVENTORY REPORT - OVERAGE/SHORTAGE - Provide report of items over/under system count.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Inventory Management	2.114	INVENTORY REPORT - HISTORY - Provide history (up to three years) report of inventory items by stock number and cost center.							
Inventory Management	2.115	INVENTORY REPORT - NO ACTIVITY - Provide report of items with no activity.							
Inventory Management	2.116	INVENTORY REPORT - ISSUED/RETURNS - Provide issued/returned report.							
Inventory Management	2.117	INVENTORY REPORT - STATUS - Provide report of all items by stock number.							
Inventory Management	2.118	INVENTORY REPORT - MONTHLY TRANSACTIONS - Provide a monthly report of all transactions by cost center and stock number.							
Inventory Management	2.119	INVENTORY REPORT - Ability to generate reorder reports by vendor.							
Inventory Management	2.120	INVENTORY MSDS - Ability to generate material safety data sheets.							
Inventory Management	2.121	INVENTORY ADJUSTMENTS - Ability to report on inventory adjustments of over \$XXX							
Inventory Management	2.122	INTEGRATION AND INTERFACES							
Inventory Management	2.123	INTEGRATION - BARCODE SCANNER - Ability to integrate with barcode scanners for issuing of inventory parts.							
Inventory Management	2.124	INTEGRATION - PURCHASING - Provide integration to Purchasing system.							
Inventory Management	2.125	INTEGRATION - FUEL SYSTEM - Need integration with Fleet Data System (Insert software version # here).							
Inventory Management	2.126	INTEGRATION - GENERAL LEDGER - Provide integration to the general ledger.							
Inventory Management	2.127	INTEGRATION - PROJECT & GRANT ACCOUNTING - Ability to integrate with project & grant accounting for related inventoried items.							
Inventory Management	2.128	INTEGRATION - WORK ORDER/MAINTENANCE MANAGEMENT - Inventory Management should be fully integrated with Work Order/Maintenance Management.							
Inventory Management	2.129	INTEGRATION - FLEET MANAGEMENT - Inventory Management should be fully integrated with Fleet Management.							
Inventory Management	2.130	INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM - System must integrate with Electronic Content Management System (To Be Determined).							

Rock River Water Reclamation District - Enterprise Asset Management - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?..000) should have only one "1". Blank rows will be scored as Not Available.

Legend:

Standard - Current	Available in current software release
Standard - Next Release	Guaranteed available in next release of software
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
Application	Number	Customer Request Management (CRM)							
CRM	3.000	REQUEST TYPES - Provide for management of request types: requests, complaints, suggestions, compliments by location, and name of requestor.							
CRM	3.001	PERSON/ENTITY - Person/Entity should provide for the storage of the following information at a minimum:							
CRM	3.002	▪ Name of Citizen							
CRM	3.003	▪ Name of In-house Contact							
CRM	3.004	▪ Date of Request							
CRM	3.005	▪ Time of Request							
CRM	3.006	▪ Forward Request To							
CRM	3.007	▪ Service Area (water, sewer, streets, electric, building/planning, other)							
CRM	3.008	▪ Location of Complaint							
CRM	3.009	▪ Description of complaint							
CRM	3.010	▪ Service Action Requested							
CRM	3.011	▪ Name of Caller							
CRM	3.012	▪ Address of Caller							
CRM	3.013	▪ Phone Number							
CRM	3.014	▪ Determination (Public, Private)							
CRM	3.015	▪ Determination Date							
CRM	3.016	▪ Employee Name							
CRM	3.017	▪ Follow up Required (Y/N)							
CRM	3.018	CALL HISTORY SEARCH - Ability to verify calls by searching for call history.							
CRM	3.019	CALL HISTORY SEARCH - Ability to verify calls by searching for call history by informant.							
CRM	3.020	CALL HISTORY SEARCH - Ability to verify calls by searching for call history by location.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
CRM	3.021	DEFINE REQUEST TYPES BY DEPARTMENT / FUNCTIONAL AREA -Ability to segregate request types by division/department.							
CRM	3.022	ASSIGN & DISPLAY PRIORITY - Ability to display requests by priority within Department, as well as by global view (all users).							
CRM	3.023	REQUEST ROUTING - Provide for the routing of a request to the proper department/employee based on type of request (Agency-defined).							
CRM	3.024	ADDITIONAL REFERRALS / ROUTING - Provide for additional referrals/routing from initial responsible department/employee.							
CRM	3.025	ROUTE REQUESTS TO MULTIPLE DEPARTMENTS - Ability to predefine the routing of request/complaint types to the appropriate department/division or individual by type of request and priority.							
CRM	3.026	MULTI-REQUESTS PER SAME INCIDENT - Ability to capture and link multiple complaints on the same incident/case (e.g., graffiti, pot hole, down sign, code enforcement complaint, etc.)							
CRM	3.027	MASS STATUS UPDATE - Ability to update status of multiple requests at the same time (e.g., five requests about the same pot hole).							
CRM	3.028	DUPLICATE REQUESTS PER SAME INCIDENT - Ability to identify duplicate requests for the same issue.							
CRM	3.029	AUDIT LOG - Ability to view audit log of request/request events, activities, dates, and status.							
CRM	3.030	ACTIONS & REMINDERS - Ability to establish future actions and reminders associated with requests.							
CRM	3.031	NOTIFICATIONS - EMAILS - Provide for the generation of emails to the citizen at the receipt of request/complaint, when action is determined, and when action is completed.							
CRM	3.032	HISTORY - Ability to view generated letters as a part of the request history.							
CRM	3.033	E-MAIL - Ability to send email updates or notifications to requestors/citizens.							
CRM	3.034	ATTACHMENTS - Ability to store attachments to the request history (e.g., photos, correspondence, e-mail, etc.)							
CRM	3.035	USER-DEFINED CORRESPONDENCE - Provide capability to configure letter templates for generating correspondence on a global basis or by request.							
CRM	3.036	CITIZEN/CUSTOMER CLASSIFICATION TYPES - Provide ability to classify any citizen/customer request by pre-defined and ad hoc types.							
CRM	3.037	AGENCY-DEFINED FIELDS - Provide ability to create agency-define additional information based upon request/complaint type (i.e., unlimited user-defined fields by type of request/contact.)							
CRM	3.038	PRIORITIZE REQUESTS - Ability to prioritize requests/complaints.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
CRM	3.039	STANDARD RESPONSE TIMES - Ability to setup standard response time requirements by request type for departmental response compliance and performance measurement tracking.							
CRM	3.040	SEARCH CRITERIA - Provide ability to obtain request/service request status by customer name, reference number, phone number, request type, and location.							
CRM	3.041	SEARCH CRITERIA - Provide inquiry capability using wild cards and close-to logic.							
CRM	3.042	STATISTICAL REPORTS - Allow for printing of reports in statistical format.							
CRM	3.043	AGENCY-DEFINED REPORT SORTING - Allow for sorting of reports in agency-defined sequences.							
CRM	3.044	ADDRESS SELECTION - Ability to select the address from a pre-populated drop-down list, limiting the ability to free-form type the address to a selected few.							
CRM	3.045	CALL SOURCE - Ability to track call input source (e.g., phone, face-to-face, e-mail, Web, etc.)							
CRM	3.046	ESCALATION PRIORITY - Ability to escalate and prioritize status for daytime and off-hours calls.							
CRM	3.047	ROUTE QUEUE - Ability to temporarily route queue to others in department pool when primary request is out of office or unavailable.							
CRM	3.048	ROUTE QUEUE - Ability to track personnel who received the citizen request.							
CRM	3.049	INTEGRATION							
CRM	3.050	INTEGRATION - LAND MANAGEMENT - Provide integration to related addresses in the Land/Parcel/Address Management database.							
CRM	3.051	INTERFACE - GIS - Provide linkage of CRM to ESRI ArcGIS (Agency to insert ArcGIS software version # here).							
CRM	3.052	INTEGRATION - WORK ORDERS/MAINTENANCE MANAGEMENT - Provide two-way integration with the Work Order/Maintenance Management module.							
CRM	3.053	INTEGRATION - ELECTRONIC CONTENT MANAGEMENT SYSTEM - System must integrate with Electronic Content Management System (To Be Determined).							

FOR REVIEW PURPOSES ONLY

Rock River Water Reclamation District - Enterprise Asset Management - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?..000) should have only one "1". Blank rows will be scored as Not Available.

Legend:

Standard - Current	Available in current software release
Standard - Next Release	Guaranteed available in next release of software
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
Application	Number	Ad Hoc Reporting							
Ad Hoc Reporting	4.000	GENERAL FEATURES							
Ad Hoc Reporting	4.001	REPORT WRITER PERFORMANCE - Capability to process report writer requests at any time throughout the processing day, without impacting system performance.							
Ad Hoc Reporting	4.002	REPORT WRITER OPERATIONS - Provide the ability to support menu-driven report scheduling options.							
Ad Hoc Reporting	4.003	REPORT WRITER OPERATIONS - Capability to generate error messages with a description of corrective actions.							
Ad Hoc Reporting	4.004	REPORT WRITER HELP - Capability to support online instructions "help".							
Ad Hoc Reporting	4.005	REPORT WRITER DATA DICTIONARY IDENTIFICATION -Capability to reference specific data items by field descriptive name (i.e., data dictionary field names and user-screen field names are the same).							
Ad Hoc Reporting	4.006	WILDCARD SEARCHES - Ability to perform searches by using wildcards or partial information (e.g., searching for accounts, funds, cost centers, projects, etc.)							
Ad Hoc Reporting	4.007	REPORT CONDITIONING OPTIONS - The following report writing capabilities need to include the ability to arithmetically calculate functions:							
Ad Hoc Reporting	4.008	▪ Capability to generate reports using "include" and "exclude" statements.							
Ad Hoc Reporting	4.009	▪ Capability to generate reports using "and" and "or" statements							
Ad Hoc Reporting	4.010	▪ Capability to generate reports using "equal to", "less than", and "greater than" statements.							
Ad Hoc Reporting	4.011	▪ Capability to use an "if-then-else" sequence within one query.							
Ad Hoc Reporting	4.012	REPORT FIELD SELECTION OPTIONS - Capability to combine the use of multiple fields from multiple modules' database tables in a single query.							
Ad Hoc Reporting	4.013	REPORT FILE REFRESHING - Capability to store and recall items whose values are derived from other values in the data files.							
Ad Hoc Reporting	4.014	ARITHMETIC FUNCTIONS - Capability to support the use of arithmetic: "addition", "subtraction", "multiplication", and "division" calculations.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Ad Hoc Reporting	4.015	BASIC STATISTICAL FUNCTIONS - Capability to support mean and standard deviations and to build cross tabulations.							
Ad Hoc Reporting	4.016	PDF FOLDERS - Ability to setup auto save folders by type of report when using a pdf writer tool.							
Ad Hoc Reporting	4.017	REPORT COLUMN DEFINITION - Capability to support default or special column headings.							
Ad Hoc Reporting	4.018	REPORT SELECTION OPTIONS - Capability to query on any element of a transaction history file, including the type of transaction and the process that originated the transaction.							
Ad Hoc Reporting	4.019	REPORT EDIT WORD DEFINITION - Capability to support unique field editing (i.e., currency, symbol, commas, decimal places, etc.) on specific data items.							
Ad Hoc Reporting	4.020	REPORT SORTING OPTIONS - Capability to support major and minor sort options.							
Ad Hoc Reporting	4.021	REPORT SUBTOTALS - Capability to support subtotal and total options by field.							
Ad Hoc Reporting	4.022	REPORT SORTING AND TOTALING OPTIONS - Capability to choose various sorting options and report totaling options with appropriate subtotalling based on selected sort option.							
Ad Hoc Reporting	4.023	GRAPHS/CHARTS ON REPORTS - Ability to print graphs and charts on reports.							
Ad Hoc Reporting	4.024	MATCHING RECORDS - Capability to support a matching record option for use with multiple files within one query.							
Ad Hoc Reporting	4.025	REPORT IDENTIFICATIONS - All reports should contain organization name, report title, column heading descriptions, processing date, sequentially numbered pages, and subtotals at each level break as appropriate.							
Ad Hoc Reporting	4.026	SAVE REPORT SETTINGS - Ability to save report settings as a specific report name attached to a agency-defined report menu.							
Ad Hoc Reporting	4.027	SAVE REPORT SETTINGS - ACCESS - Ability to indicate which saved reports can only be accessed by certain individuals.							
Ad Hoc Reporting	4.028	ELECTRONICALLY FILE REPORTS - Electronically save reports for subsequent users' access (e.g. on an internal intranet page, user dashboard or report menu, etc.)							
Ad Hoc Reporting	4.029	REPORT SCHEDULING - Provide report scheduling along with email distribution for recipients.(repeat options of specific days, weeks, weekly, monthly)							
Ad Hoc Reporting	4.030	REPORT OUTPUT SELECTION - Ability to support user specification of the output media (i.e., printer or screen).							
Ad Hoc Reporting	4.031	LARGE REPORT TO PRINT WARNING - Ability to warn the user they are about to print a large report (displays number of pages).							
Ad Hoc Reporting	4.032	MICROSOFT EXCEL - Ability to download files to a Microsoft Excel format.							
Ad Hoc Reporting	4.033	PDF FORMAT - Ability to save reports in PDF format.							
Ad Hoc Reporting	4.034	DISPLAY PRINTER QUEUES PRIOR TO PRINTING - View or print reports, as an option.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Ad Hoc Reporting	4.035	PRINTING TO "SAVE" REPORTS TO OUTPUT QUEUES - Ability for printed output to be queued to any of the system or network printers.							
Ad Hoc Reporting	4.036	REPORT RETENTION - Ability to save and maintain report specifications for periodic use.							
Ad Hoc Reporting	4.037	INTEGRATIONS							
Ad Hoc Reporting	4.038	INTEGRATION - SQL SERVER REPORTING SERVICES - Ability to integrate SSRS Reporting Services into the Application for documents and statistical reporting needs.							
Ad Hoc Reporting	4.039	INTEGRATION - THIRD PARTY REPORT WRITERS - Ability to integrate with a third-party report writing tools, such as Crystal Reports and Cognos.							

FOR REVIEW PURPOSES ONLY

Rock River Water Reclamation District - Enterprise Asset Management - Feature Function Requirements

Please input a "1" in the appropriate column to the right of the feature/function/capability statement. Further explanations, or information regarding 3rd party software and/or modification costs should also be provided in the comments column and Project Costs worksheet (Appendix G), if applicable. Each "non-title" row (?).000 should have only one "1". Blank rows will be scored as Not Available.

Legend:

Standard - Current	Available in current software release
Standard - Next Release	Guaranteed available in next release of software
Report Writer	Report Writer function through Standard Reports or Ad Hoc Report Writer
3rd-Party Application	Please estimate general cost estimates in comments not a quote, unless available due to your resell arrangement.
Custom Modification	Custom programming by vendor (not meant to be a set-up configuration that is standard process through implementation. Please estimate general costs in comments (not a quote).
Not Available	Not available in current or next release; interfaced/integrated third-party application or through custom modification.

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd-Party Application	Custom Modification	Not Available	Comments
General System and Security									
Gen Sys and Sec	5.000	GENERAL SYSTEM							
Gen Sys and Sec	5.001	PERSON/ENTITY - Ability to maintain central person/entity record identification information throughout all modules (e.g., Planning, Permitting, Business Licensing, etc.)							
Gen Sys and Sec	5.002	MULTI-USER ENVIRONMENTS - Ability to prevent any master file record from being deleted if that record is referenced in any other file.							
Gen Sys and Sec	5.003	MULTI-USER ENVIRONMENTS - Operate in a multi-user environment so record locking will be required to maintain the integrity of the data.							
Gen Sys and Sec	5.004	ONLINE TRAINING DOCUMENTATION - Online access to printable training materials and other support documentation.							
Gen Sys and Sec	5.005	AGENCY-DEFINED DASHBOARDS - Ability for each user to create or modify existing dashboards.							
Gen Sys and Sec	5.006	FORWARD/BACKWARD NAVIGATION - Ability to navigate through records or files on a screen in a forward or backward direction.							
Gen Sys and Sec	5.007	NO. OF RECORDS DISPLAYED - Ability to allow users to change the number of records displayed as a result of a search (e.g., 20, 50, 100, etc.)							
Gen Sys and Sec	5.008	RENAME LABELS - Ability for authorized users to rename field labels.							
Gen Sys and Sec	5.009	REQUIRED FIELDS - Ability to designate both standard and user-defined fields as requiring data entry.							
Gen Sys and Sec	5.010	FILE EXPORT FORMATS - Ability to export files using the following file format types:							
Gen Sys and Sec	5.011	▪ PDF							
Gen Sys and Sec	5.012	▪ Word							
Gen Sys and Sec	5.013	▪ Excel							
Gen Sys and Sec	5.014	▪ Comma Delimited Values							
Gen Sys and Sec	5.015	FILE IMPORT FORMATS - Ability to import files using the following file format types:							
Gen Sys and Sec	5.016	▪ PDF							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Gen Sys and Sec	5.017	▪ Word							
Gen Sys and Sec	5.018	▪ Excel							
Gen Sys and Sec	5.019	▪ Comma Delimited Values							
Gen Sys and Sec	5.020	MAINTAIN AUDIT TRAILS -Maintain audit trails including changed by, changed date, and record of changes.							
Gen Sys and Sec	5.021	HISTORICAL DATA - Ability to maintain, at a minimum, 10 years of historical transactional data.							
Gen Sys and Sec	5.022	USER DASHBOARDS - Ability to incorporate real-time individual user dashboard capability to display dynamic charts and graphs.							
Gen Sys and Sec	5.023	FAVORITES MENU - Ability to assign menu items to a favorites menu.							
Gen Sys and Sec	5.024	LIST OF RECENT RECORDS - Ability for a user to see a list of records they recently created/viewed/modified from their dashboard.							
Gen Sys and Sec	5.025	ERROR REPORT SUBMISSIONS - Ability to directly submit system generated error reports and messages to vendor software support.							
Gen Sys and Sec	5.026	VENDOR SUPPORT ACCESS TO CLIENT - Provide electronic connection. Vendor can connect to computer server for diagnosis and resolution of software problems.							
Gen Sys and Sec	5.027	BATCH PROCESSES - Ability to run specific assigned jobs, by permission, in a batch process.							
Gen Sys and Sec	5.028	MASS UPDATES - Ability to load and run mass additions, updates, deletions and purges in the system.							
Gen Sys and Sec	5.029	MASS UPDATES SYSTEM BACKUP UTILITIES AND PROCESSES -Provide flexible backup utilities enabling the backup of individual items, application databases or the entire system.							
Gen Sys and Sec	5.030	VIRTUAL DESKTOP - Ability to work in a VDI (virtual desktop) environment.							
Gen Sys and Sec	5.031	3RD PARTY INTERFACES - Ability to run and load 3rd party interfaces into the system.							
Gen Sys and Sec	5.032	EMAIL INTEGRATION - Sending emails from system utilizing standard SMTP protocols.							
Gen Sys and Sec	5.033	WEB AND MOBILE APPLICATIONS - Web and mobile applications must use mobile responsive design for optimized usability on a variety of screen sizes, including smart-phones, tablets, laptops, and desktops.							
Gen Sys and Sec	5.034	SYSTEM SECURITY							
Gen Sys and Sec	5.035	GENERAL SECURITY FEATURES - Provide access security by:							
Gen Sys and Sec	5.036	▪ Application							
Gen Sys and Sec	5.037	▪ Field level							
Gen Sys and Sec	5.038	▪ Menu item/function within application							
Gen Sys and Sec	5.039	PASSWORD ENCRYPTION - Provide password encryption. Please describe your level and implementation of encryption in the comment field.							
Gen Sys and Sec	5.040	PASSWORD RECOVERY - Provide users self-password recovery capability.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Gen Sys and Sec	5.041	SECURITY ACCESS PASSWORD CHANGE - Maintain the date of last password change for each user.							
Gen Sys and Sec	5.042	RESTRICT SECURITY ACCESS OF SELECTED TRANSACTIONS -Restrict entry of certain transactions by password.							
Gen Sys and Sec	5.043	SECURITY ACCESS CONTROL - Assign view only access to specific user profiles.							
Gen Sys and Sec	5.044	DRILL DOWN RESTRICTIONS - Ability to restrict certain users from being able to drill down into specific modules to view (inquire) transactions.							
Gen Sys and Sec	5.045	PERMISSIONS - Ability to specify read, write, edit and delete permissions.							
Gen Sys and Sec	5.046	RESTRICT SECURITY ACCESS - Restrict users' access to specific screens and to perform certain functional processes (e.g., refunding fees)							
Gen Sys and Sec	5.047	REPORT WRITING TOOLS ACCESS - Ability to allow only specific users to access report writing and query tools.							
Gen Sys and Sec	5.048	UPDATE CONTROLS - Ability to add and update module configurations as outlined in security roles by permission.							
Gen Sys and Sec	5.049	CREATE SECURITY PROFILE BY COPYING EXISTING PROFILE -Allow creation of new user rights by copying another user's right levels and modifying.							
Gen Sys and Sec	5.050	GROUP CREATION/CONTROL – Ability to create groups of users by a role type and to apply/change access rights to groups of users.							
Gen Sys and Sec	5.051	USER/GROUP ACCESS CONTROL – Ability to modify a user's or group of users' log-in access status (e.g., active, inactive, on-hold, etc.)							
Gen Sys and Sec	5.052	LOG-OFF USER - INACTIVITY - Ability for the system to automatically log-off a user after a long period of inactivity.							
Gen Sys and Sec	5.053	FORCE USER LOG-OFF - Ability for a system administrator to log-off a user from the system.							
Gen Sys and Sec	5.054	SECURE REPORTS - Ability to set up security for reports so only certain reports can be viewed by certain individuals							
Gen Sys and Sec	5.055	SINGLE SIGN-ON - ACTIVE DIRECTORY - Support of Single Sign-on and Active Directory.							
Gen Sys and Sec	5.056	USER AUTHENTICATION - Supports mixed mode authentication - (i.e. if AD integration is enabled, still allow non-AD user accounts to login)							
Gen Sys and Sec	5.057	USER AUTHENTICATION - System provides added layer of security via Two-Factor Authentication (2FA), which requires a user to submit additional authentication along with their username and password.							
Gen Sys and Sec	5.058	• 2FA support for U2F authentication, such as Yubikey							
Gen Sys and Sec	5.059	• 2FA support for strong tamper-proof solution, like Duo Mobile App							
Gen Sys and Sec	5.060	SAAS/CLOUD HOSTING SECURITY AND ACCESS							
Gen Sys and Sec	5.061	BACKUP ENCRYPTION - Ability to encrypt all data backups. Provide level of encryption in the comments column.							

Application	Feature Number	Feature / Function / Capability	Standard - Current	Standard - Next	Report Writer	3rd Party Application	Custom Modification	Not Available	Comments
Gen Sys and Sec	5.062	DATABASE ENCRYPTION - Ability to encrypt data from all databases when at rest (stored). Note to Vendor: Provide level of encryption in the comments column.							
Gen Sys and Sec	5.063	PASSWORD MANAGEMENT - Ability to use a password management tool to manage storage and security rights for all customer data.							
Gen Sys and Sec	5.064	DATA CENTER RESILIENCY - Ability to maintain resilient data centers resulting in zero customer downtime in the event of a failure or compromise of one data center.							
Gen Sys and Sec	5.065	ALLOCATED INTERNET BANDWIDTH & INTERNET RESILIENCY - Ability to maintain multiple connections from multiple internet providers with automatic failover at each data center.							
Gen Sys and Sec	5.066	SLA UPTIME - Ability to maintain a SLA Uptime of 99.9% or greater.							
Gen Sys and Sec	5.067	SOC 2 REPORT - Ability to provide a SOC 2 report outlining data center security available upon request							
Gen Sys and Sec	5.068	HIPAA COMPLIANCE - Ability to provide (upon request) a statement of compliance with all HIPAA guidelines as reviewed by third party.							

FOR REVIEW PURPOSES ONLY