This document is a draft Scope of Services/Technical Specifications for a future <u>competitive</u> contract Miami-Dade County anticipates entering into. Scope of Services/Technical Specifications is subject to change without notice.
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<u>Miami-Dade County, Florida</u>
<u>Project Title: Technology Consultant Services for Procurement of EAMS Integration</u>

SCOPE OF SERVICES

1. **<u>Project Background and Purpose</u>**

Currently, the Miami-Dade Aviation Department (MDAD) Automotive Shop uses RTA Fleet Management Software as a stand- alone Fleet Work Order system. The primary use of this program is inventory management, work order creation to track work performed in the Automotive Shop, and other functions listed below. Due to limitations of the RTA software, RTA has minimal interaction with MDAD's financial and supply chain system of record — PeopleSoft ERP Financial System, (PeopleSoft or ERP) — and is limited in its ability to interact with PeopleSoft. The objective is to replace RTA with the ERP Enterprise Asset Management Solution (EAMS) Fleet Management module. In doing so, MDAD plans to take advantage of new functionality, use the superior architecture in EAMS to integrate to Peoplesoft, shift the Inventory Management work in RTA and perform this work in PeopleSoft.

2. **<u>Qualifications</u>**

The Awarded Proposer should have substantial experience in providing services similar to EAMS integration to PeopleSoft, shift the Inventory Management work in the Fleet Management Software (RTA), and perform this work in PeopleSoft.

3. **<u>Required Services</u>**

   A. Move Inventory Management processes/functions from RTA to PeopleSoft and build multiple interfaces from the PeopleSoft Inventory, Cost Accounting, and Procurement modules to EAMS for reporting and analytic purposes.

   B. Remove procurement processes from EAMS and re-engineer those processes to be handled in PeopleSoft.

   C. Build any interfaces from Peoplesoft procurement to EAMS that are required for reporting out of EAMS.

   D. Standardize all the Automotive Shop's supply chain management and financial processes between Peoplesoft and EAMS and leverage existing bi-directional interfaces from EAMS to Peoplesoft.

   E. Perform discovery, analyze, design, develop, test and implement functionalities to replace current RTA features listed below with EAMS functionality:

   a) The selected Proposer is required to meet with MDAD staff to refine requirements detailed below. An initial walk-thru of the automotive shop and a review of the RTA system is required. Additional information may be needed to configure the EAMS application according to their findings.

   b) **General** – The newly designed system should be able to track common Fleet Maintenance operations including, Corrective maintenance, Preventive maintenance (PM), standard vehicle information, work order cost tracking, audit reporting, vehicle history, vehicle status/down time and vehicle inventory.

   c) **ERP Integration** – Requires uni-directional (and possibly bi-directional) integration with PeopleSoft ERP Financial system (via integration broker). Interface touch points include: (Current integration exists)

   i) Real-time Work Order look up in EAMS from PeopleSoft for material stock request (MSR) issues.

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     ii) MSR order entry in EAMS with interface to Peoplesoft to create an MSR for fulfillment in PeopleSoft.

     iii) Inventory transactional information (quantity, items, unit cost, etc.) integrated on an hourly basis from Peoplesoft to EAMS.

     iv) Item sync from Peoplesoft to EAMS daily.

     v) Potential asset sync from PeopleSoft to EAMS.

d) Requires one-way integration for PeopleSoft HR (County system name is INFORMS HR)

     i) Capture of hourly rate for mobile shop employees. Review current HR-ERP integration and make changes/corrections as needed.

e) **Vehicle Tracking –** Includes integration with ERP inventory control system that allows vehicle capitalization/depreciation, vehicle replacement monitoring, tracking existing vehicles, new vehicle processing and assignment, vehicle failure analysis, and cycle count report of parts.

f) **PM Notification –** This option displays a list of all vehicles due for Preventives Maintenance (PM) services by mileage OR by time (example oil change at 3 months OR 3000 miles). Once list is displayed, it can be sorted to display the PM assigned by work order and/or the PM that still needs to be assigned. System notifications should be designed to alert responsible staff.

g) **Work Order –** This module is a comprehensive repair order system that allows you to create work orders, check lists, posting of parts/labor/tires/warranty. It will also provide the function to track mechanics/technicians and measure industry time standard against their actual work time on jobs performed. Full work order cost reporting should be available by vehicle, facility, customer or department. MDAD may need external vendors (dealership specialty shops that perform unique specialized services or repairs) deemed as flat rate jobs whereby work order estimate must also be available. Use of VMRS codes for tracking components that are repaired/replaced.

h) **Parts Inventory –** As noted above, will align with the current ERP-EAMS integration that currently exists. Warehouse functionality such as barcoding, cycle counts to be considered.

i) **Purchase Orders (PO) –** This project will disable the procurement-related functions in EAMS and re-engineer those functions to be performed in PeopleSoft These functions/processes will include creating/maintaining Chart Of Accounts, Requisition entry, RFP, creating and managing POs, contracts, and item pricing, Receipts, etc.

     i) if needed, vendor will build all necessary interfaces from Peoplesoft Procurement Module to EAMS (or the reverse) that are required for procurement reporting in EAMS.

     ii) MDAD currently uses PeopleSoft Enterprise Financial Supply Chain Management 9.2, Image 31, while working on a PUM Image 48 upgrade. MDAD intends to keep all financial transactions within PeopleSoft ERP system. Requisitions and Purchase orders associated with stock and non-stock items will be identified in ERP and can be sent to EAMS as part of the integration process. The EAM Integrator will need to work in parallel with PeopleSoft Integrator for a coordinated and streamlined process between both systems.

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j) **Vehicle Status (only for mobile shop users) –** The vehicle availability screen allows users to view, in real-time, the status of each vehicle in the fleet. Moreover, as part of discovery vehicle status classification as well as relevant details including technician hold, parts hold, time stamp to name a few will be displayed.

k) **Motor Pool –** It supports the function to reserve vehicles within your fleet that are considered motor pool vehicles. Users can request vehicles at various rates for the rental period.

l) **Mobile –** Configuration of mobile application to allow field staff to request parts (MSR), enter labor, and view equipment status.

m) **Warranty –** Allows to track original equipment manufacturer warranty, recover lost revenue by auto creating a claim submission form from the work order module. Provides statistics by manufacturer, make, model, year, part type, vendor, etc.

n) **Reports –** Must support the option to export data to spreadsheets and / or email capabilities in a pdf and/or excel format. Reports provide history, trends, performance, cost, downtime, productivity, forecast, utilization and more. Please estimate 10 custom reports to be created.

o) **Key Performance Indicators** – Obtain data for vehicles, parts, fuel, tires, in a chart or numerical format. Data compares information for highs/lows/averages and totals.

p) **Dashboards –** It allows you to customize each user in the fleet, including management or mechanics with custom dashboards to be created to keep staff informed of the items in the facility.

q) *<RTA data Clean-up and Conversion / import>* Method to extract and store data from the legacy system. (Storage in EAMS is preferred).

r) **System Settings and Security –** Includes a comprehensive security feature that allows to turn off/on access to areas or features of the software, including read only/full Access to data in the system. ***Role's setup depending on the position and be able to change roles as needed.***

s) **Additional Information Tracking Function** – This module includes image viewer which will work with most master menu screens, allowing the user to attach pictures and text files.

    i) Documents include material safety data sheet, warranties information from the manufacturer, and schematics or instructions.

    ii) The system must support the function to view digital photographs of vehicles and/or equipment throughout various modules mentioned above.

t) Vendor shall provide documentation of the implementation work done and provide training on all modules.

u) Vendor shall include post implementation support hours to be used on an ad hoc basis.

v) Vendor must be present in-person, on-site during the implementation of important milestones and meetings including, but not limited to, kickoff, discovery, key meetings, etc. to ensure that they understand the operational factors for the project. In addition, an initial visit is required by the vendor to have security credentials verified. At MDAD's discretion, the vendor may work remotely.

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4. <u>Work Order Term</u>

The County anticipates award of a single Contract to a single Selected Proposer to provide services, with one Purchase Order issued per Phase as defined in Section 5 below. The term of each Purchase Order shall terminate upon completion of each phase as defined in the County's resultant Purchase Order. The project will be considered complete upon performance of all services and acceptance by the County of the tasks outlined herein.

5. <u>Payment Schedule</u>

Invoicing shall be submitted based on work completed. Payment shall be made after completion of all tasks for each phase invoiced, following delivery and acceptance of all deliverables for said invoice. All payments are contingent upon completion of required services.

The resultant engagement shall be priced in phases as follows:

A. Project Kickoff and Planning – 5% of total engagement

B. Requirements Gathering and Analysis– 15% of total engagement

C. System Design and Configuration – 15% of total engagement

D. System Cutover Preparation & Deployment– 15% of total engagement

E. Testing and Quality Assurance -15% of total engagement

F. Training and Knowledge Transfer – 10% of total engagement

G. Go-Live and Post-Implementation Support – 25% of total engagement

The County, at its sole discretion, may decide to engage in one or any combination of the phases described herein. Completion of the services shall be measured as fulfillment of all services requested for any phase, including submission to, and final acceptance by the County of any deliverable for action. Proposers may propose milestones for each phase and associated values to allow for partial payments in each phase, not to exceed the total allowable percentage per phase.

6. <u>Additional Optional Services</u>

The selected Proposer shall perform additional related services as may be requested by the County, including but not limited to those defined in herein or other post award consultant services that may be required as part of the EAMS integration to PeopleSoft. Additional services will be paid at the hourly rates on the awarded Consultant's Price Proposal Schedule.

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