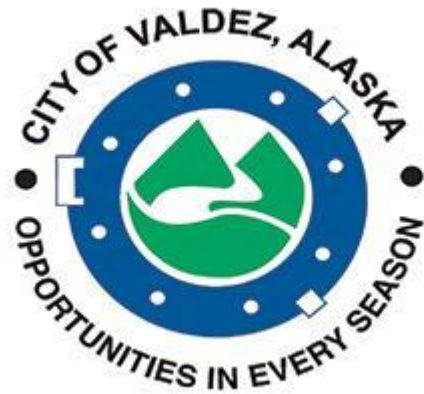MAINTENANCE
CONNECTION®

Response to: Request for Proposal

City of Valdez
Request for Proposal
Building Maintenance and Fleet Management Solution

Prepared for:

CITY OF VALDEZ, ALASKA
OPPORTUNITIES IN EVERY SEASON

Maintenance Connection, Inc.
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Fax: 1-775-255-6324

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MAINTENANCE
CONNECTION®

03/31/17

Lisa Martin
City of Valdez
ATTN: MMS RFP
PO Box 307 / 212 Chenega Street
Valdez AK 99686

Dear Ms. Martin:

We would like to thank you for allowing Maintenance Connection to participate in responding to your RFP for a Computerized Maintenance Management System. We certify the accuracy of all information contained in this response and are available to provide any additional comments and information as necessary.

For over 15 years, Maintenance Connection has been a rapidly growing company leading the way in maintenance management software using pure web technologies. Our solutions are deployable either onsite or hosted online in our secure data center.

Maintenance Connection is a privately held company based in Davis, California. The company originated in 1999 and was incorporated in the State of California having an Employer Identification Number of 68-0482039, and a listing with Dun & Bradstreet (DUNS # 14-212-4275).

Maintenance Connection has been funded by private investors (angel funding) and has enough cash to sustain operations (without any product revenue) for the next 3 years. Maintenance Connection has been cash flow positive each quarter since its launch, and has a client-retention rate of greater than 95%. Information in regard to previous financial statements can be made available at a later date.

Maintenance Connection currently employs over 70 full-time staff members. Our growth has gone from 12 in 2005, 34 in 2010, and 75 in 2017. 35 of our staff members are in support related positions. We have strategic partnerships with many great organizations throughout the state of California as well as 1,300+ locations using MC across the US and internationally.

Please coordinate all scheduling and negotiation efforts through Ike Shepardson. If there is anything else required or should you have any questions, please contact him directly at either:

Email: ishepardson@maintenanceconnection.com
Phone: 888-567-3434 x813.

Best regards,

Brad Squires; VP

Training

We desire a "train the trainer" format

Maintenance Connection is happy to support a train the trainer format. Our training development includes the following activities.

- Identifying and categorizing subsets of the anticipated user population
- Developing appropriate training requirements for each subset of users
- Defining and creating needed training materials
- Developing a high-level training plan and requirements document

Often overlooked in training plans are Executive and Management individuals. While they are not direct system users, they must be made aware of the system capabilities and functionality. To accommodate this, our training plans include a high-level management training session during which we introduce the system and explain the available features and reporting capabilities.

Given that we have a strong background in facilities management and business improvement, our training for clients is not narrowly targeted at the new software. Our training programs could cover any of the following topics depending on the specific needs of our clients:

- General software training
- Training on new processes and management practices
- General continuous improvement strategies and methodologies
- General asset management training (asset management strategies)

A training plan will be developed along with definition behind each role requiring training. Training is a very key element of success with implementing CMMS. Training is available online, onsite with the customer, or at the Maintenance Connection corporate training center in Sacramento, CA.

Group training is typically provided in a classroom environment, complete with training guides, videos, review sheets, tests, etc. In addition we provide a one-on-one "train-the-trainer" approach as well. Users also have the opportunity to participate in regional training seminars, typically held twice a year. Typical training programs may be defined for the user subsets below.

Administrative Training

System administrators and project leads will be trained on every aspect of Maintenance Connection. This will help determine all aspects of the software to be used. Administrative training will cover everything from reports to general work process to part management functions.

Site Administrator Training

Combined training with site-level administrators to be held in a combined format. This training will cover all necessary aspects of administering Maintenance Connection at the site level. This will cover such things as generating PMs, ordering parts, assigning and scheduling work orders, etc.

End-User Training)

This training group is focused on functions necessary for the end-users. This will include such things as updating/closing work orders, managing parts, looking up work histories, adding equipment, etc.

**See sample two day training plan on the next two pages**

Day One

Introductions
- Definition of individual roles
- Define and document general goals and expectations from the software
- Review of current maintenance management process
- Explanation of new maintenance management process incorporating software

General Product Navigation
- General definition of each area of the application
  - File Menu, Module Explorer, Toolbar, Module WorkCenter
- Description of each module
- Adding new records
- Editing records
- Deleting records
- Searching for records
- Explore vs. Split View
- File menu, importance of 'Log Off'
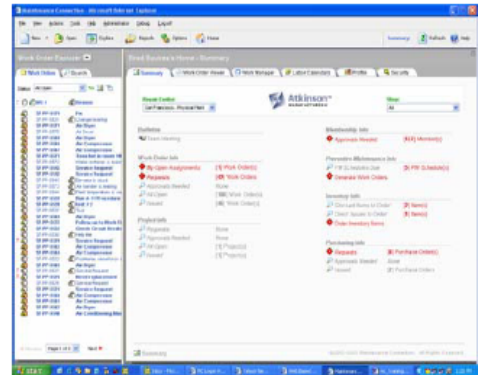
Initial Setup of Company Data
- Repair Centers and Shops
- Crafts and Labor
- Access Groups
- Accounts
- Assets – Equipment/Locations, Classifications
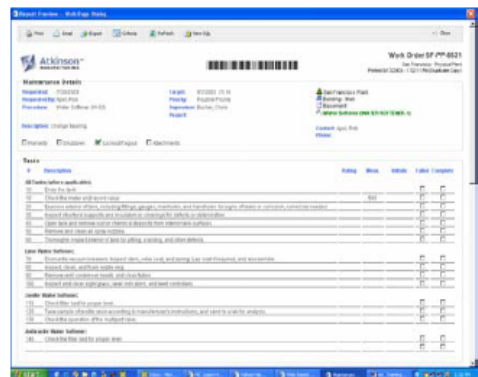- Preventive Maintenance
- Stock Rooms
- Inventory Items
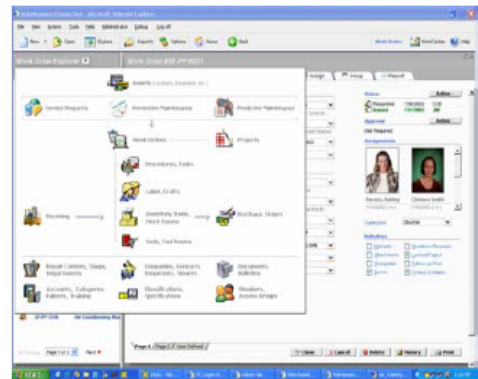
Location and Asset Hierarchies
- How to create a new location or equipment
- Application of each Asset Module tab
- Overview of Classifications Module

General Workflow and Work Order Module
- Creating new requesters using the connection key
- How to create a new work order
- Assigning labor to a work order
- Changing work order status
- How to close out a work order
- Work order status filters
- Review of data filters and search option

Preventive Maintenance and Procedures Modules
- How to schedule preventive maintenance
- Overview of each Preventive Maintenance tab

Wrap up / Q&A

Day Two

Review of Day One
- Review each module's definition and function
- Review asset hierarchy and general workflow
- Review Preventive Maintenance Module

Labor Module and Scheduling
- Overview of Labor Module tabs
- Work Manager and Labor Calendars
- Assign labor on a work order

Members Module
- How to sign up new members
- Approval process and assigning access groups
- Overview of Access Groups Module

Company Module
- Overview of Company Module tabs
- Overview of Contact Module tabs

Reports Module
- How to generate a report
- What can you do with a report?
- Report groups and batch reports
- Ad hoc criteria for reporting
- How to copy and modify system reports
- Review Setup Report dialog

System Options (if we have time)
- System Actions
  - Generate Work Orders
  - Generate Work Order Projections
  - Order Inventory Items
  - Receive Inventory Items
  - Adjust Inventory Item Quantities
  - Meter / Mileage Update
  - Warranty Update
  - Labor / Craft Rates Update
  - Asset Configuration
  - Requester Application Configuration
  - Survey Manager
  - Holiday Manager
  - Reset Asset / Location Costs to 0
- System Preferences
  - Difference between 'My Preferences' and 'Repair Center Preferences'
  - Describe the impact of each system preference
  - Copy Preferences

Wrap up / Q&A
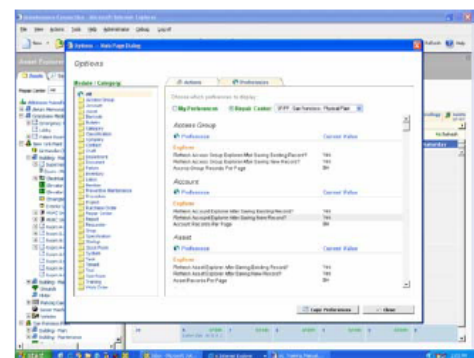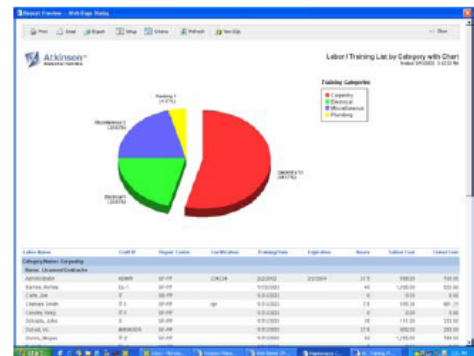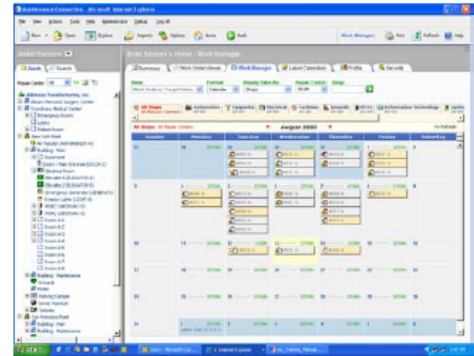
Building Maintenance and Fleet Management Requirements

Preventative Maintenance, Work Order and Inspection must each be clearly defined in the system
-Able to view service history
This is viewable through Asset History.

-Able to have check list options
These are defined as Procedure lists in Maintenance Connection.

-Able to attach/store manuals, model numbers, serial numbers, pictures, invoices
Yes, documents and other attachments can be appended to records.

-Equipment specific data listed on PM/WO – such as filter sizes
These are part of the Asset Specifications that can roll down to the Work Order and PM records.

Report functionality
- Able to generate multiple types of reports by filter capabilities
Yes, reports can be generated using criteria points that are captured through the regular maintenance process. Filters can be added to reports using our Smart Elements features.

-Able to create custom reports as needed
Yes, any data that is captured through maintenance can be configured to view through reports.

Simple Interface
-Must be user friendly
Yes. Our interfaces are similar to Windows-based and App-based products.

Mobile Access
-Phone or tablet app
Our mobile application, MC Express, can be used on Apple, Android, and Windows Mobile devices.

-Web access
Yes, the application is web-based and can be accessed through the Cloud or through an On Premise browser address.

Inventory tracking – in/out supply count
Yes, parts can be tracked as used, and the software includes a counting feature.

Fleet Management needs to function for
-Cars, trucks, machinery (loaders, bobcats), dump trucks, fire trucks, ambulances, and police vehicles – all city rigs
Yes, Maintenance Connection can manage fleet as Assets and can account for location changes simply.

Would like ability to Chargeback to other departments
-Account for time and money spent at specific location(s)
Yes, time and costs can be tracked and associated with departments or a standard GL code list.

-Start/stop time to track employee time while on WO location
Yes, our mobile application includes a start/stop timer function.

-Code WO to the account money comes from
Yes, these codes can be associated with Work Orders.

-Ability to track time and wages relating to WO or equipment repair
Yes, these items can be tracked at the Work Order level.

References

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sadams@cityofsacramento.org

City of Orlando
Aaron Green
321-765-8021 x5031
aaron.green@cityoforlando.net

System Minimum Requirements

MAINTENANCE CONNECTION® Minimum Requirements

End User Configuration

Main Application – v7

MRO Work Center, TWC Work Center, Service Requester

The full Maintenance Connection Application is optimally viewed from a computer or device with a suitable screen size and keyboard. While the larger screen provides an optimal viewing area for the extensive features available, it should be noted that the system can also be accessed from touch devices such as tablets.

Recommended:

Windows PC
- Chrome
- Internet Explorer 11+

Mac
- Chrome
- Safari

Chromebook
- Chrome

Also Supported:

Windows Tablet
- Chrome
- Internet Explorer 11+

iPad
- Chrome
- Safari (iOS 6+)

Android Tablet
- Chrome (Android 4+)

MC Express – v1

Technician Focused Mobile Application

MC Express was designed for touch devices and is optimally viewed on smaller devices, such as smartphones and tablets. It should be noted that MC Express can also be accessed from larger devices such as computers and laptops.

Recommended:

Windows Phone / Tablet
- Chrome (Tablet only)
- Internet Explorer 10+

iPhone / iPad / iTouch
- Chrome
- Safari (iOS 6+)

Android Phone / Tablet
- Chrome (Android 4+)

Kindle Fire
- Silk

Also Supported:

Windows PC
- Chrome
- Internet Explorer 10+

Mac
- Chrome
- Safari

Chromebook
- Chrome

Since both Operating Systems and Browsers are updated quite frequently, users are advised to use the latest version available for their device.

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Minimum Requirements

On-Premise Server Configurations

Single Server Configuration

Combined Application / Database Server

Entity DB (Opt.)

Entity DB   Registration DB   IIS   End Users

This configuration requires a centralized Microsoft Server with SQL Server and IIS installed. Each installation contains two databases, a Registration Database for managing logins and an Entity Database for the main application data. Additional sites may utilize the same Entity Database, or separate Entity Databases can be deployed.

RECOMMENDED SERVER REQUIREMENTS
- ✓ Windows Server 2012 [1, 2]
- ✓ Quad Core – 3 GHz+ Processor
- ✓ 8 GB RAM (or more)
- ✓ 40 GB Disk Space (or more) [3]
- ✓ IIS 7.0 (or higher)
- ✓ SMTP Server Access
- ✓ Microsoft SQL Server 2012, 2014 (standard or higher)

MINIMUM SERVER REQUIREMENTS
- ✓ Windows Server 2008, 2012 [1, 2]
- ✓ Dual Core – 1.4 GHz Processor
- ✓ 4 GB RAM
- ✓ 10 GB Disk Space [3]
- ✓ IIS 7.0 (or higher)
- ✓ SMTP Server Access
- ✓ Microsoft SQL Server 2008 (standard or higher)

Multi-Server Configuration

Database Server

Entity DB (Opt.)

Registration DB   Entity DB

This configuration utilizes a separate Microsoft SQL Server to manage and store data (registration and application data as shown above). This database server can be shared with other enterprise SQL applications.

RECOMMENDED SERVER REQUIREMENTS
- ✓ Windows Server 2012 [1]
- ✓ Quad Core – 3 GHz+ Processor
- ✓ 8 GB RAM (or more)
- ✓ 25 GB Disk Space (or more) [3]
- ✓ Microsoft SQL Server 2012, 2014 (standard or higher)

MINIMUM SERVER REQUIREMENTS
- ✓ Windows Server 2008, 2012 [1]
- ✓ Dual Core – 1.4 GHz Processor
- ✓ 4 GB RAM
- ✓ 5 GB Disk Space [3]
- ✓ Microsoft SQL Server 2008 (standard or higher)

Application Server

IIS   End Users

This configuration utilizes a separate Application Server running IIS 7.0 or higher. This server can be shared with other enterprise applications as MC will run within its own virtual directories.

RECOMMENDED SERVER REQUIREMENTS
- ✓ Windows Server 2012 [1, 2]
- ✓ Quad Core – 3 GHz+ Processor
- ✓ 4 GB RAM (or more)
- ✓ 15 GB Disk Space (or more) [3]
- ✓ IIS 7.0 (or higher)
- ✓ SMTP Server Access

MINIMUM SERVER REQUIREMENTS
- ✓ Windows Server 2008, 2012 [1, 2]
- ✓ Dual Core – 1.4 GHz Processor
- ✓ 2 GB RAM
- ✓ 5 GB Disk Space [3]
- ✓ IIS 7.0 (or higher)
- ✓ SMTP Server Access

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[1] *Maintenance Connection software can be installed on Physical (Bare Metal) Servers or Virtual Servers.*

[2] *MC Express also requires the Microsoft .Net 4.0 Framework.*

[3] *Disk requirements depend on the use of features such as file uploading as well as the amount of data stored in the database.*

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