
Information Technology Division

ERP

Enterprise Resource Planning System Project

REQUEST FOR INFORMATION



July 6, 2010



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July 6, 2010

Vendors/Consultants:

SUBJECT: REQUEST FOR INFORMATION FOR ERP SOLUTIONS

The City of Los Angeles Harbor Department (Department) invites the submittal of information from qualified consultants and vendors to deliver Enterprise Resource Planning – ERP solutions to the Department.

This is not a formal solicitation for proposals. The Department will only use this information to understand general vendor capabilities and functionalities of their proposed solutions. The Department will not make a vendor selection from this process. A formal Request for Proposal will be developed and is targeted for distribution in the fall of 2010.

The schedule for this RFI will be as follows:

Request for Information Published	July 6, 2010
Information Packages Due	July 30, 2010 before 4:00 p.m.

Sections 2 and 3 of this RFI contain general descriptions of the ERP project and solicit responses to questions in areas labeled "Vendor Response". Please enter your responses to these questions and include them as Section 3 of your Information Package, as instructed in Section 3.6 Information Package Content (along with the other information requested).

If your firm has not already done so, we recommend you register on the Department's Contracts Management Database, e-diversityXchange. You can register by going to www.portoflosangeles.org and clicking on the 'Business' link. You will be required to be registered on e-diversityXchange should you wish to submit a formal proposal in the future.

Thank you for your participation in this process. We believe that this will help inform the Department on ERP solutions, so as to enhance our competitive selection process.

Sincerely,

LANCE KANESHIRO
Chief Information Officer

LK/JK

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1. INTRODUCTION

1.1 *Brief Overview of the Project*

The Information Technology Division (ITD) is soliciting information from qualified vendors of Enterprise Resource Planning Solution that will include accounting, budgeting, purchasing, inventory management, (supply chain) and human resources systems' capabilities for the Los Angeles Harbor Department (LAHD or Department).

In the Fall of 2010, the Department anticipates issuing a formal RFP and completing a vendor selection process by mid-calendar-year 2010.

1.2 *The Port of Los Angeles*

The Port of Los Angeles (POLA), Southern California's international commerce gateway, is located in San Pedro Bay, 20 miles south of downtown Los Angeles and is immediately adjacent to and contiguous with the Port of Long Beach. The two ports function under completely independent local jurisdictions but have regular interaction with each other.

POLA is the busiest container port in the United States and 8th busiest in the world. It is the busiest cruise center on the west coast, and the 4th busiest in the United States. This booming seaport complex is known for its groundbreaking environmental initiatives, progressive security measures, and diverse recreational and educational facilities. POLA encompasses over 7,500 acres with over 43 miles of waterfront. Serving over 90 shipping and cruise lines, the 26 cargo terminals and World Cruise Center support over 3,000 vessel arrivals carrying nearly 170 million metric revenue tons of cargo, and 1.2 million passengers every year.

LAHD is a proprietary (self funded) department of the City of Los Angeles charged with the operation, maintenance and protection of the Port of Los Angeles. LAHD is a landlord port that leases properties to private sector terminal, tug, and marine cargo and cruise industry transportation entities.

1.3 *The Information Technology Division*

ITD is a Division of the Bureau of Finance and Administration. ITD supports the core enterprise systems for the Department, and provides the overall infrastructure for information and communications systems for the Department.

1.4 *RFI Submission Requirements*

We are asking for vendors to deliver their information packages in hard copy format along with a CD containing the submittal files.

Label: Vendor Name Information Package for POLA ERP Solutions

One (1) original with five (5) copies of your Information Package plus a CD of your submittal files must be submitted on or before 4:00 p.m. on July 30, 2010 to:

By Hand Delivery: Lance Kaneshiro
CIO Information Technology Division
Port of Los Angeles Administrative Office
425 S. Palos Verdes Street
San Pedro, CA 90731
Attention: (Julia Kirwan, ERP Project Manager)

By Mail Delivery: Lance Kaneshiro
CIO Information Technology Division
P.O. Box 151
San Pedro, CA 90733-0151
Attention: (Julia Kirwan, ERP Project Manager)

Electronically transmitted proposals will not be considered. All information packages will be date stamped as the Harbor Department receives them.

Vendors solely are responsible for the timeliness of their submittals.

1.5 *Information Package Content*

Please submit your information package in the following format and sections:

1. **Cover letter:** Include a cover letter on your company's letterhead with a brief description of the ERP solution and its primary benefits.
2. **Overview of ERP Solution:** Provide a description of the modules contained in the ERP solution. Include relevant information, charts or diagrams that will help the Department understand the features and functions of the solution, its benefits, and its implementation/integration approach.
3. **Vendor Response:** Include responses to the questions as contained in Sections 2 and 3 of this RFI.
4. **Supporting Documentation and Brochures:** Provide other supporting documentation, brochures or information in this section of your information package.

2. ERP PROJECT DESCRIPTION

This RFI is intended to gather information from vendors of ERP solutions. It has two purposes: 1) to gather information on the capabilities of vendor ERP solutions and 2) to identify information that would be necessary in the RFP for vendors to provide a complete and comprehensive proposal for ERP implementation.

2.1 *ERP Project Objectives*

LAHD is interested in replacing its current financial system with a new financial, accounting, budget, purchasing, inventory and human resources management information system. The replacement of the current system has the following major objectives:

- Increased system functionality
 - o Providing many users in all bureaus direct access to the system and responsibility for maintaining their own data, while ensuring LAHD-wide central controls, processing reporting as necessary.
 - o Meeting user requirements for financial, accounting, budget, purchasing, inventory and human resources management information functions.
 - o Reducing the need for “shadow” systems.
 - o Maintaining favorable system performance.
 - o Providing a user-friendly online reporting environment.
 - o Exceeding the functions provided by the current system, such as the future ability to conduct business electronically.
- Low risk
 - o Acquiring mainstream packaged software and implementing the package with minimal customization.
 - o Providing a proven solution through the implementation of a software package that is in widespread use by similar organizations.
 - o Interfacing with the City’s Financial Management Information System, and the Payroll Replacement System (PAYSR),
 - o Interfacing with the Department’s Billing System (Klein Billing System), Real Estate System Property Management System (AIMS), Construction and maintenance System (MAINSTAR), and the Enterprise Geographic Information System (ESRI based eGIS).
 - o Procuring proven technology platforms and protocols that reflect future trends and emerging industry directions.
 - o Addressing security and control issues such as user access, data security, data backup, disaster recovery and system audit trail.
 - o Facilitating knowledge transfer to LAHD personnel.
 - o Providing a system with high reliability and minimal down time.
 - o Holding a single consultant accountable for all technical deliverables and all services associated with the project for a fixed price.

- Cost effectiveness
 - o Projecting and realizing benefits that justify project costs and risks.
 - o Reducing ongoing maintenance costs, as compared to the present system.
 - o Recognizing both direct and indirect costs associated with replacing the financial system.
 - o In the future, being able to easily extend and enhance the system using standardized, flexible, vendor-maintained modular technology.

2.1 Vendor Response:

2.1.1 Do you believe that these goals and objectives are complete?

2.1.2 Is there further information that you believe would assist a vendor in preparing a proposal for software and implementation services?

2.2 ERP Critical Success Factors

LAHD has identified the following factors critical to the success of this project:

- Selection of a consultant-provided implementation team with sufficient, relevant experience
- Selection of appropriate software which meets immediate requirements, and which can accommodate new requirements easily
- User friendliness and ease of use of the software for both transaction processing and ad hoc reporting
- Excellent communication among LAHD and consultant personnel
- A comprehensive and accurate acquisition, implementation and maintenance cost proposal from the vendor
- A comprehensive implementation plan
- Adequate training for LAHD personnel for efficient use and operation of the system
- Effective change management

2.2 Vendor Response:

2.2.1 Do you believe that these critical success factors are complete?

2.2.2 Is there further information that you believe would assist you as a vendor in preparing your response?

2.3 **ERP Project Scope of Work**

LAHD envisions that the RFP will solicit proposals for the following scope of work.

1. Install and configure integrated application software.
2. Develop and implement any required customizations to the application software (though the only customizations expected relate to interfaces with other systems).
Develop and implement required interfaces to other systems:
 - a. City Controller Financial System (FMIS)
 - b. City Controller Payroll System (PAYSR)
 - c. LAHD Billing System (Klein Port)
 - d. LAHD Real Estate Property & Lease Management System (AIM)
 - e. LAHD Construction & Maintenance System (Mainstar)
 - f. LAHD Enterprise GIS (eGIS).
3. Provide a system that satisfies all the functional requirements identified in the RFP.
4. Provide a technical description of the proposed system.
5. Provide a detailed list of hardware and software. Specify required application servers, workstations, and other peripherals.
6. Provide a project management process that includes a detailed project management plan and schedule and a change management/risk mitigation strategies.
7. Provide a step-by-step overview of the schedule and approach to be used during installation and implementation (including data conversion and interfacing). The project plan and scope of work should include, at a minimum:
 - a. Requirements fit-gap analysis
 - b. Design
 - c. Design review meeting
 - d. Code/test
 - e. Readiness review
 - f. Qualification testing
 - g. Installation
 - h. Documentation
 - i. Final delivery “acceptance” testing.
8. Test the application software, including any required customizations, to ensure that it is working correctly with satisfactory response times.
9. Provide necessary system and user documentation.
10. Provide training to:
 - a. Core project team members
 - b. System administrators and technical staff
 - c. End users
 - d. Internal auditors

11. Support all system acceptance testing. Provide test plans and reports to verify requirements' satisfaction. The proposer shall provide the LAHD with a description of the procedures it intends to use for tracking discrepancies resulting from system acceptance testing.
12. Provide on-going support and maintenance.

2.3 Vendor Response:

2.3.1 Do you believe that this project scope is complete?

2.3.2 What would you add or modify in this scope of work?

2.3.3 Is there further information that you believe would assist you as a vendor in preparing your response?

2.4 Current System Overview

It is important to understand that the LAHD maintains its own financial records, but must interface with the City Controller's financial (FMIS) and payroll systems (PAYSR) as the City has the legal responsibility to generate warrants (checks) from the City of Los Angeles to its vendors or employees. Further note, that LAHD relies on the City Personnel Department for applicant and selection processes as well as benefits administration. Note that the City is in the process of replacing FMIS with a new financial management system – FMS, a CGI (Former AMS) public sector financial application. While the city plans to have FMS in place by June 2011, all references made to interfaces with City financial and accounting systems refer to the existing FMIS solution.

Mainframe Applications: Presently, the LAHD functions are supported by a diverse set of integrated (via batch process) and non-integrated applications. Core financial and timekeeping applications are supported by a combination of batch-oriented mainframe applications originally implemented in 1980. The applications were purchased and implemented using GEAC/INFOR E-Series – 96.01, or developed in-house in the COBOL environment. These systems operate in the IBM Mainframe environment running VM with VSE as a guest operating system. They use CICS with VSAM files. GEAC/INFOR uses a proprietary language "IE", however, ITD staff load information to a SQL data warehouse and use SQL and Crystal Reports for ad hoc reporting.

Reports for General Ledger, Accounts Payable, and the Available Funds Reports which are generated on the mainframe GEAC/INFOR applications are sent to a report repository called LaserVault. Employees are able to view some of these reports in their entirety or by their specific division.

All of the GEAC/INFOR application modules and custom developed mainframe modules will be replaced by the ERP solution. These mainframe modules include:

- **General Ledger (GL):** Contains the official chart of accounts and financial information for the Department (INFOR).
- **Financial Controller:** Translates monthly batch processed information from subsidiary financial system modules to the General Ledger (INFOR).
- **Subsidiary Modules:**
 - o **Accounts Payable (A/P) and Materials Management (Purchasing) :** Processes purchase requisitions, purchase orders, vendor payments, payments for employee travel and City Services. A/P contains the vendor master file records. The A/P module also processes approved vendor payments and also sends an interface to the City FMIS. The City FMIS returns data on actual amounts paid. A/P feeds the Department's General Ledger through the Financial Controller via a monthly batch process. (INFOR)
 - o **Accounts Receivable (A/R):** Processes revenue receipts to the Department. It receives payment information from the Wacovia EDI Lockbox application and the current Billing system. Presently, the A/R module interfaces with the Department's General Ledger through the Financial Controller via a monthly batch process. Note that it is anticipated that the Lockbox application will remain in place with the ERP solution, and that vendors will need to accommodate that interface. Further, the current mainframe oriented billing system is being replaced with a COTS solution – the Klein Port (billing system), a server based application (this is discussed below). It is anticipated that Klein Port will remain in place and that the ERP vendor will write an interface between the new Klein Port and the ERP solution. (INFOR)
 - o **Payroll:** Process biweekly time and attendance data for regular employees, hiring hall (on-demand workers), part-time workers, and student workers; produce labor and benefit expense information for financial reporting and cost accounting purposes; summarize data and transmit to the City of Los Angeles Controller's Office to generate paychecks. Timekeeping is fed from the Department's HDTime application – a customized server based application. HDTime in turn interfaces with the City's Payroll System PAYSR (discussed below). The current INFOR Payroll module provides information (on workers compensation related costs (Injured on Duty, therapy, Light Duty etc) to Risk Management via the mainframe and through a SQL query. It also supplies information to the GL via the Financial Controller for cost allocation and tracking of salary expenditures. (Custom-Developed)

- o **Fixed Assets (FA):** This module tracks the Department's fixed assets, and maintains schedules for asset valuation, depreciation, and inventory. (INFOR)
- o **Inventory Control (ICS):** This custom developed module tracks inventory receipts at the main warehouse managed by Contracts and Purchasing Division (the Department stores). It uses the IDEAL Programming language/COBOL and DataCom database format. (Custom-Developed)

Server Based Applications: The following applications operate on the LAHD VM Microsoft Server environment. Unless specified otherwise, the databases for each are MS SQL (the Department's database standard).

- **HDDTime:** HDDTime was custom-developed by Hess & Associates to provide a time reporting module for the Harbor Department that would interface to the City's PAYSR Payroll System (Hess & Associates also developed PAYSR). It also interfaces payroll data to the Department's GEAC/INFOR Financial Controller module. HDDtime receives leave balances and Form 41 (personnel actions) from the City's PAYSR. Employees or timekeepers enter time keeping information and adjustments to HDDTime. At each pay period close, HDDTime sends data to the Department's mainframe which in turn sends information to PAYSR. PAYSR sends actual payroll data to the LAHD mainframe and the Accounting/Payroll Unit reconciles balances between HD Time, GEAC/INFOR Payroll, and PAYSR. HD Time also uses Crystal Reports as a reporting tool.
- **Billing:** The Klein Port Billing System (Version 5.1.2.33, database Version 5.1.2.21 MSSQL) is a product of Klein Systems Inc. It is highly specialized around the unique port-related revenue and billing structures– such as tariff, wharfage, and tenant/terminal lease conditions. The Klein Port implementation should be completed by December 2010. It is anticipated that Klein Port will remain in place and be interfaced with the ERP solution. The ERP vendor will be responsible for writing and implementing this interface. The interface should receive billing data from Klein to the ERP, and send back payment information to Klein from ERP.
- **Invoice Management Monitoring System (IMMS):** IMMS is a custom in-house developed application that has been established to provide on-line tracking of invoice status. This is an interim system written in VB, whose functionality should be replaced with an ERP solution. Presently, IMMS gets information from the A/P module in the Department's Financial system, and will receive data on payment status from the City's Financial System. (Custom-Developed)
- **Budget:** The budget system is a newly implemented server based INFOR budget module, Version 10.1.4. Crystal Reports is used as the reporting tool. The Budget system is used to prepare and track the LAHD Budget and provide reporting to department managers to maintain accountability for budget expenditures. The Budget system resides on the VM server environment and also has a client environment on the PCs. It is anticipated that the budget

module will be replaced by an ERP solution. While originally Budget data was only loaded annually using FTP, it now has a capability for uploading on-demand. (INFOR Server)

Diversity eXchange – is a hosted internet based solution that manages the registration of contractors to participate in various commodity or services opportunities with the LAHD. It also tracks the procurement process. It operates on an SQL platform and is supported by Taylor's Marketing Management.

Non-Integrated Server Applications: To meet their needs for information management, individual Divisions have created their own shadow systems for monitoring budgets, purchases, and inventory. Some are COTS packages and others are in-house developed applications using ACCESS or Excel. Key applications of interest to the ERP Project are:

- **Real Estate:** The Real Estate Division is currently installing Asset Works "AIM" System 3.1 Version SP2 to support leasing and property management (this is a 32 bit system that will be upgraded to the AIM 4.1-64 bit system in the near future).. It is anticipated that AIM will require information (via interface) from the ERP solution. While the exact format of data to be interfaced has not yet been determined, Real Estate would like to have information by lease or terminal customer on fixed assets, revenue, and costs relating to supporting a terminal/lease account. This could include posting costs from the Construction and Maintenance MAINSTAR system on work orders relating to maintenance and repair for a terminal/lease account/customer. (COTS)
- **Construction and Maintenance MAINSTAR System:** MAINSTAR version 11.02 (produced by MainStar Inc.) tracks maintenance and maintenance related work orders and related inventory. MainStar uses SQL as its database. Work Order processing tracks workload, work assignments, labor hours by work order, and related supplies, materials, equipment costs to carry out the work order. While the nature of the interface between ERP and MAINSTAR has not been specifically defined, it is anticipated that MAINSTAR would require labor rate information from the ERP, payables on associated purchases, and inventory costs from ERP. MAINSTAR could then send work order cost information to the ERP for reporting and cost allocation purposes, or for interface with the Real Estate AIM system on costs relating to lease/terminal account/customer. There is also a need to use either MAINSTAR or perhaps the ERP to conduct labor analysis for resource loading to plan for work force assignments. (COTS)
- **Enterprise GIS (eGIS):** eGIS is a department wide solution for storing, managing, and viewing geographic imagery and data. The eGIS is based on ESRI (ArcGIS 9.3.1) technology and Geodatabases (ArcSDE) which run on SQL Server 2008. The data is viewed and edited from both AutoCAD and ESRI systems. While not an immediate priority for the ERP project, vendors

are encouraged to supply examples of how GIS interfaces to ERP and the general values and benefits of such an interface.

- **Project Information Control System PICS:** PICS has been developed in-house on the Microsoft Access application to track project status and expenditures for Capital Improvement Projects. PICS is administered by the Engineering Division and is accessed and updated department wide by the designated Project Managers. Engineering staff receive hardcopy reports from GEAC/INFOR on payroll (labor hours worked on CIP Work Orders) and hardcopy reports and accounts payables (costs charged to CIP Work Orders). Payroll and payables information is manually entered to PICS for tracking the overall CIP budget and project costs. (In-House ACCESS)
- **Human Resources Access Database:** The HR database is used for tracking position status/position control; case information on grievances, disciplinary and related actions; classifications, MOUS, Employee information, special payment eligibility, etc. This operates on a standalone Access Database that operates on the Department's server. Special reports (such as the Vacancy Report) are generated for Department management use. The HR Database is accessible by HR personnel only. **It will be required that the ERP Solution incorporate the functionality of the HR Database into the implemented solution.** (In-House ACCESS)

In addition to the above mentioned systems, Port Police utilizes various COTS solutions: INTime to support shift scheduling and training compliance, IntelliTrack for inventory and accountable property monitoring, and IA Pro for managing internal investigations. It is anticipated that these applications will remain outside of the scope of the ERP solution.

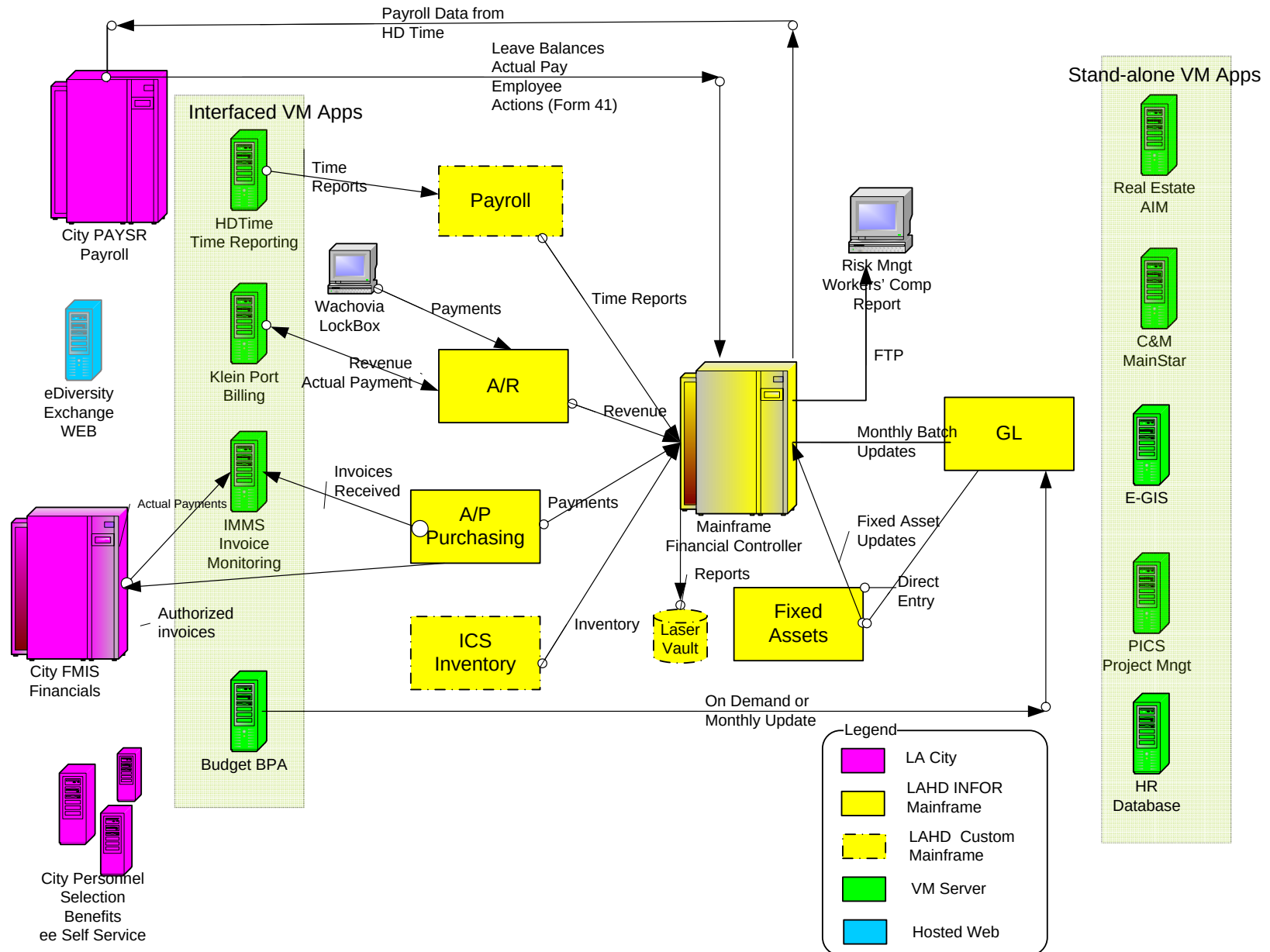
2.4 Vendor Response:

2.4.1 What additional information do you require of the existing information system environment to assist you as a vendor in preparing your response?

2.4.2 What additional information do you require regarding these existing processes and modules that would assist you as a vendor in preparing your response? (e.g. do you require budget statistics, employee counts, transaction counts, number of casual users, number of power users, data elements of existing applications, etc.

The overview of the current system environment is depicted on the following page:

Los Angeles Harbor Department Current System Architecture



3. ERP APPLICATION AND TECHNICAL CAPABILITIES

3.1 ERP Components

At a minimum, LAHD's ERP should include the following modules/components:

- Financial Modules:
 - o General Ledger
 - o Accounts Payable
 - o Accounts Receivable
 - o Fixed Assets
 - o Grant Accounting
 - o Project Accounting
 - o Time Reporting (Payroll interface)
 - o Budget
- Supply Chain Modules:
 - o Contract Management
 - o Small Business Enterprise Program (e-Diversity xChange)
 - o Purchasing
 - o Inventory Management
- Human Resources Modules:
 - o Time Reporting (duplicates above)
 - o Personnel Management

3.1 Vendor Response:

3.1.1 In general, describe the capabilities of the solution that you would propose and how it addresses these modules.

3.1.2 What additional modules are available and how would you recommend implementing them? (Is there a critical path for implementation?).

3.1.3 Describe the interoperability among the component modules of the ERP solution and how they share enterprise information?

3.1.4 Is it possible to implement your ERP solution in a phased approach, and if so, in what order would it be best to implement your solution?

3.1.5 What additional information do you require regarding these application components that would assist you as a vendor in preparing your response? (e.g. do you require budget statistics, employee counts, transaction counts, number of casual users, number of power users, data elements of existing applications, etc.

3.2 **ERP Interfaces**

LAHD also anticipates that the ERP solution will require interfaces to other City systems and other Departmental systems. These include interfaces to:

- City's Financial Management Information System (FMIS) City custom application (Current interface, will be replaced with interface to the new City FMS)
- City's Payroll Replacement System (PAYSR) Hess & Associates Custom Application (Current interface)
- LAHD Klein Port Billing System V 5.1.2.33 (Existing Billing system is interfaced, however when Klein Port is installed, it will require an interface to ERP).
- LAHD Construction and Maintenance Work Order Management System – MainStar (Not currently interfaced)
- LAHD Real Estate Lease and Property Management System – AIM – Asset Works Version 3.1 SP 2 (Not currently interfaced)
- LAHD Enterprise GIS - ESRI (Not currently interfaced)

3.2 Vendor Response:

3.2.1 What additional information do you require regarding these interfaces that would assist you as a vendor in preparing your response?

3.2.2 Has your ERP solution interfaced to any of the above COTS solutions?

3.2.3 What is the interoperability matrix in regards to other database platforms and interfaces?

3.3 *ERP Technical Configuration*

3.3 Vendor Response:

3.3.1 Describe the computing environment(s) supported by your ERP Solution.

3.3.2 Will your ERP solution support SQL as the database?

3.3.3 What version of SQL are you currently supporting?

3.3.4 What database to you recommend for your ERP Solution and why?

3.3.5 Will your ERP solution run in a VM environment? Describe.

3.3.6 What is your company's policy in upgrading to the latest version of OS and Database platforms? Please specify the frequency and date of last upgrade.

3.3.7 What is the interoperability matrix in regards to other database platforms and interfaces? (Redundant with the interface question above).

3.3.8 How do you handle data encryption? Describe.

3.3.9 How do you handle system security? Describe

3.3.10 What types of back up, DRP, BRP, protocols and tools do you support or recommend for your ERP Solution?

3.3.11 What capabilities does your ERP solution have for data auditing? (Tracking who has access, who and when a change was made). Describe.

3.3.12 Does your ERP solution use Software as a Service?

3.3.13 Does your ERP solution use Service-Oriented Architecture?

3.3.14 Does your ERP solution use Web Services?

3.3.15 Does your ERP solution utilize the Microsoft .NET architecture?

3.3.16 Is your ERP Solution a model driven application, Does it utilize Business Process Management? If so, how?

3.3.17 What is the User Interface for your ERP Solution?

3.3.18 Does your ERP Solution utilize collaboration software or tools? Which ones? Explain how they are used in the solution?

3.3.19 Is your implementation team certified in the proposed ERP Solution?

3.3.20 How would you approach the implementation effort to minimize modifications and implement a “vanilla” solution?

3.3.21 How will your ERP Solution and implementation methodology address change management issues?

3.3.22 How do you use Business Process Management in the implementation process or function-fit analysis?

3.3.23 How flexible are your process models?

3.3.24 What systems implementation methodology do you use?

3.3.25 Would you propose an implementation approach that partners the ERP software vendor with a system integrator partner?

3.3.26 What project management methodology do you use?

3.3.27 How do you approach data migration from legacy systems to the ERP relational database environment? What is your experience with mainframe data structures?

3.3.28 What additional information do you require regarding technical configuration that would assist you as a vendor in preparing your response?

3.2.29 Do you offer cloud-based solutions? If so,**3.3.29.1 What is the application?****3.3.29.2 Is it hosted by the software company or a partner?****3.3.29.3 Is it a full feature application with all the features of an on-premise solution?****3.3.29.4 Is it on shared or dedicated hardware?****3.3.29.5 How are updates, version control and configuration management handled?****3.3.29.6 Describe its security.****3.3.29.7 Describe its disaster recovery.****3.3.29.8 How is this licensed?****3.3.29.9 Describe any limitations that are the common concerns.**

3.4 *ERP Implementation and Support*

3.4 Vendor Response:

3.4.1 How do you license your ERP solution?

3.4.2 Is it possible to unbundle the software suite of modules for licensing and implementation purposes?

3.4.3 How are license fees calculated?

3.4.4 How are maintenance license fees calculated?

3.4.5 Do you allow for phased implementation and module pricing?

3.4.6 How are products updated and how are updates distributed to clients?

3.4.7 Describe your support services. Do you offer:

3.4.7.1 Do you offer toll-free numbers?

3.4.7.2 Dial-in diagnostics?

3.4.7.3 Internet support?

3.4.8 What are your service escalation protocols?

3.4.9 Do you provide professional quality documentation?

3.4.10 How do you price implementation services, and ongoing maintenance?

3.4.11 Provide a list of any users' groups for your ERP solution, or components.

3.4.12 How do you minimize Total Cost of Ownership in the lifecycle of your ERP Solution?

3.4.13 What is the estimated lifecycle of your solution?

3.4.14 What type of support structure will your proposed solution require post implementation (to support systems administration, security control, coordination of patches, updates, maintenance)?

3.4.15 How do you structure and deliver training (technical, casual users, expert/power users, management)?

3.4.16 What would you see as an implementation timeframe?

3.4.17 What would be your dedication to having the project team on-site during implementation, testing, system turnover, training?

3.4.18 How will documentation be delivered and maintained?

3.4.19 Is customer support provided by the system integrator, ERP Solution Vendor or both? If combined, then how do you manage escalation procedures/protocols between the integrator and software vendor?

3.4.20 What additional information do you require regarding technical configuration that would assist you as a vendor in preparing your response?