TITLE: **SMU IWMS/CMMS RFI 2018 - QUESTIONS & ANSWERS**

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SMU would like to remind all vendors and consultants that this is a Request for Information (RFI) in lieu of a Request for Proposal (RFP). Our approach is that "we do not know what we do not know." Therefore, this is your opportunity to educate us on the capabilities and functionality of your IWMS software so that we might move forward with an actual Request for Proposal (RFP) with a much more defined set of requirements and priorities.

- Section 1.3, last paragraph Page 4. Facilities & Space Management, 2nd bullet point
  - Visual representation of data integration. Does this mean the same as visual floor plans hatched with various data? Yes, we want the ability to query data for visual representation on the floor plans as well as "click" on a room to pull up a data window.
- Page 5, top half, multiple bullet points:
  - Facilities Condition Audits. Is there a process for these audits in place today? How is this accomplished? Data is collected and transferred to create work requests. This needs to be integrated within a CMMS.
  - Facilities Infrastructure Management. Does this refer to mechanical, electrical and plumbing? What all does SMU believe this encompasses? MEP and potentially IT.
  - Landscape and Grounds Management. What level of detail is SMU seeking here? Ability to manage the campus grounds, not just the buildings.
  - Safety and Training Management. Is this a function of the IWMS? Please let us know if this is typically not an IWMS function.
  - GIS & BIM Integration. What GIS mapping data is being collected now and in the future? Does BIM mean the same thing as Autodesk Revit? If so, how extensively is Revit used today? There is a campus map in GIS, however, very little GIS, BIM, and Revit are being utilized at SMU.
  - Procurement Integration. In which system does procurement use today and what type of integration does SMU foresee? Technically, no current procurement integration as a purchase order must be created separately.
  - Scheduling Software integration. Assuming this refers to Ad Astra and StarRez. Are there any other scheduling systems in place, like for events? Ad Astra and PeopleSoft are currently used for class scheduling - event scheduling is done many different ways. SMU is reviewing these processes. StarRez is a student housing management software.
  - PeopleSoft integration. What data does SMU foresee sending to the IWMS? For instance, employee name, title, ID, location? As listed, but also financial information.
- Section 1.3.2 Operations & Maintenance
  - Initiate and track requests across a variety of disciplines and processes. What are these disciplines and processes that are under consideration here? Disciplines would be trades, contractors, vendors, requesters, etc. Processes would be work requests, both base and additional services, preventive maintenance, projects, etc.

- o Real time connectivity to e-Builder. What data does SMU foresee exchanging with the IWMS and how often does SMU foresee exchanging this data? Visually represent location of projects on floor plans, including the data pertaining to the project, perhaps transferred weekly.
  - o Ability to track trades within a work order… What is a trade? Electrician, plumber, etc.
- Section 1.3.3. Business Operations (note: these functional requirements strike us as functions of a financial system, not IWMS)
  - o Accommodate university business units and invoicing? Does this mean the same as chargebacks to various departments? The PeopleSoft connection is most important here. Also, please note that SMU charges departments for some services and others are considered base services and not charged. However, we still need to track all transactions whether charged or not, including inventory, time, etc.
  - o Vendor Management, procure to pay. How is this being handled today? How would this integrate with the IWMS? Currently input into systems separately, including PeopleSoft and e-Builder.
  - o Ability to cross-charge. Does this also refer to departmental chargebacks? See above.
  - o View history related to financial posting. How is this handled today and how would this data integrate with the IWMS? See above.
  - o Manage budgets with a full asset and organizational hierarchy. How is this managed today and how would it integrate with the IWMS? Currently, trades, parts, etc. within the same work order require separate work orders - a "parent-child" relationship is desired.
- 1.3.4. Capital Project Management
  - o Financial accounting – cost control and management. How is this managed today and how would this integrate with IWMS? Is this coming from PeopleSoft? e-Builder and PeopleSoft Financials.
  - o Streamline bidding and review processes? Where are the bids originating – are they coming from consultants, architects, etc.? Yes.
- Section 1.3.5. Real Estate & Lease Management
  - o Manage data related to real estate transactions. What are the types of real estate transactions are being referred to here? Lease transactions.
  - o Lease creation and management. Are you asking for full legal lease document creation or the data from the lease document to be integrated with the IWMS. Data from lease documents.
- 1.3.6. Energy Management
  - o Ability to integrate with building management systems… What building management systems are in place and can these systems export relevant data for ingestion into the IWMS? Energy Management is currently outsourced so we need to know your software capabilities in this area.
- 1.4. Technology, page 8
  - o …integration should include… What are "charge exports"? Charges can be exported as a batch process and imported into PeopleSoft.
- Should FMS consider all locations (Dallas, Plano and Taos) in its response and price calculations? If so, we will need square footage for Plano and Taos. Plano and Taos not included.
- Reason for wanting to go off TMA? SMU has not made this decision.
- After the RFI and demo's, what is your RFP timeline? Potentially fall 2018.
- What does Facilities Infrastructure encompass? MEP and potentially IT - both buildings and grounds.

- What sort of functionality are you looking for with GIS/BIM? We need to know your system capabilities in this area.
- I know in the past SMU outsourced its Facilities Management, is that still the case? No.
- From an implementation viewpoint what order of priority do you put on CMMS, Space, Capital Planning, Lease and Energy. Per the RFI, our initial focus is on facilities and space management (CAFM) and CMMS.
- How many concurrent users would there be in the system. Uncertain - please elaborate on your licensing structure based on user levels.
- How many core users would there be in the system? Uncertain - please elaborate on your licensing structure based on user levels.
- When filling out the technical response should we address the statements under each category or provide a general response to the section such as CMMS as an example. Please make certain all is covered.
- Section 1.3.1 Space Management & Facilities Data – "Reporting in the form of utilization tracking and analysis."
  - Are you referring to reporting on utilization using occupancy sensors or more traditional vacancy with people assigned to spaces? Traditional vacancy, however, future possibilities would be good to know.
- Section 1.3 Desired IWMS Capabilities
  - Please describe in more detail your requirement surrounding "visual representation of data integration" We would like data to be transferred visually to the floor plans and vice versa.
- Section 1.3 Desired IWMS Capabilities
  - Please provide your current tools for BIM and GIS. Are these Revit and ESRI or other? Currently, BIM 360 is being utilized by an outsourced partner as an information archive for 10,000+/- pieces of equipment in facilities. This will need to be integrated with CMMS for a preventive maintenance program.
- Section 1.3.3 Business Operations Common Functional Requirements
  - General questions. Will the general ledger reside in the IWMS or will the information gathered within the IWMS (labor hours, parts, costs, etc.) be sent to your core financial system (PeopleSoft) and billed from there with an integration back to the IWMS? Financial transactions would be sent to PeopleSoft, but we would expect the system to generate an invoice.
- Section 1.2 Current Operating Environment
  - Does SMU use any data warehousing or BI tools? Data Mart residing on Oracle and SQL Server and IBM Cognos as a BI tool.
- General
  - Is SMU engaging a third party consultant to assist in the evaluation or procurement of IWMS solutions? Not at this time.
  - Has SMU had IWMS software demonstrations leading to the RFI process? A few people have seen or have had experience with various systems, but this will not influence our review.
  - Some IWMS software companies self-perform implementation and others utilize third party partners. Does SMU have a preferred model for implementations delivery? No preference at this time - decision will be based on what is best for the University.

- How many vendors were invited to respond to this RFI? Decline to answer.
- Who developed this RFI? How was it constructed? Decline to answer.

- Has the organization seen product demonstrations at this time? If so, what system(s)? A few people have seen or have had experience with various systems, but this will not influence our review.
- What internal departments and key stakeholders will be involved in the decision-making process for this project? A cross-functional review team will be created consisting of all key stakeholders.
- What compelling event or key business driver, if any, is influencing the timing of this project and the need for a new system? Data accuracy and consistency as well as need for a proactive environment.
- Can you please elaborate on the roles and number of people expected to need access to the new system? How many of the users would be professional/back office users that actually manage the data and workflow processing (add/modify/delete/create & run reports) vs. self-service/front office users (only view data and/or submit requests)? Uncertain - please elaborate on your licensing structure based on user levels.
- Regarding implementation, what is your desired start date and your desired "go-live" date? Early 2019 start date - need your input for potential "go-live" date.
- Will your project team have access to internal IT resources for the decision process and implementation? Yes.
- Please describe your project team that will be involved in the implementation. A cross-functional review team will be created consisting of all key stakeholders.
- Please describe the anticipated level of engagement of your project team. For example, will the team members be full-time on the project, or will the team members' time be split between multiple projects? To be determined - we need your input on best practices.
- How many CAD drawings does your organization have for the scope of this project? Are they polylined? Per the RFI, SMU has AutoCAD plans for all building floors with rooms numbered and polylined.
- Is the organization interested in kiosk solutions for room reservation and hoteling? Additional capabilities not outlined in the RFI are good to know.
- Please detail the desired level of mobile functionality for technicians in the field. Does your organization want technicians to have access to a mobile app? Do technicians need to have offline capabilities? Mobile application is required in addition to offline capabilities.
- Does your organization require mobile functionality for end users making self-service requests (e.g., to reserve a room or to request a maintenance work order)? Does your organization desire a mobile app for end users to make these requests? Yes - currently we have a web-based request for work requests and project requests.
- What is the approximate total number of end users (e.g., students, faculty, staff) who will need access to make self-service requests (e.g., move request, room reservation, work order request)? 20,000+
- What is the estimated total number of self-service requests (e.g., move request, room reservation, work order request) per year? 42,000+/- work or move requests - room reservations are not part of the current system, but information on this capability would be good to know.
- Does your organization require the new system to provide lease accounting functionality to be compliant with the new FASB ASC 842 standard? Yes, if lease accounting is included.

    o If so, how many property leases would your organization be managing with the new system? Please specify how many leases are managed from the tenant perspective, and how many leases are managed from the landlord perspective. 200+/- all currently all from landlord side.

- o If so, how many asset leases would your organization be managing with the new system? None at this time, but it would be good to know about this possibility.
- Please describe the extent of Building Information Modeling (BIM) integration your organization desires. Please let us know your system capabilities.
- Please explain the use cases and functionality for the integration of eBuilder and new system. Transfer of project data visually to floor plans for information purposes. Also would like integration with CMMS for cross-functional purposes.
- IBM TRIRIGA SaaS provides our customers with the entire TRIRIGA suite including all 5 modules: Real Estate, Operations, Facility & Space Management, Capital Projects and Environmental. Would you please explain the number of users in the community based on access requirements based on each of the following roles:

  - o Enterprise User - Administrators of the Application (Full access to all functionality of the system). Uncertain - please elaborate on your licensing structure based on this user level.
  - o Occassional User - Day to day users of the application. These users will be configured with securities that will dictate what information/modules they can view, access and update in the system based on roles/responsibilities. Uncertain - please elaborate on your licensing structure based on this user level.
  - o Reports and Authorization - These users are typically in managerial roles that only require read only access and the ability to pull reports and authorize requests and required approvals in the system. Uncertain - please elaborate on your licensing structure based on this user level.
  - o Self Service Request - These are users that will be opening tickets for work orders, reservation requests, etc. They will not be accessing the application, simply opening up tickets as needed. Uncertain - please elaborate on your licensing structure based on this user level.

- The RFP indicates that SMU would like to initiate the implementation of the IWMS solution with a focus on Operations & Maintenance as well as Facility and Space planning. As we develop the project timeline, starting with these two initiatives, what is SMU's vision in reference to the roadmap to incorporate the additional functionalities including Capital Projects (eliminating e-builder), Real Estate and Environmental? Undetermined at this time.
- Once SMU has selected the solution and vendor, what is the estimated starting timeframe for the kick-off of the project? What is the expected go-live for the first two phases, O&M and Space and Facility Management? Estimate early 2019 kick-off, but no idea as to expected go-live date. We need your expertise and input as to potential and possible timelines.
- Is Office365 in use by prospective users of this tool. If not when id Office365 expected to be in use by these tool users? Yes ,however, e-mail remains on premises.
- Approximately how many users of this tool are expected. Uncertain - please elaborate on your licensing structure based on user levels.
- Regarding e-builder usage
  - o When does current contract with e-builder expire? Decline to answer.
  - o Please identify you find limitation e-builder has for this integrated solutions desired. Not applicable to this RFI.
  - o For integration to e-builder
    - ➤ What data wants to be exported from e-builder to IWMS? Location of projects on floor plans.
    - ➤ What data wants to be exported to e-builder?
  - o Is e-builder hosted on your computers or provided SAAS? Decline to answer.

- As vendors of competing systems to e-builder are usually not cooperative, even with customer insistence, are you open to an integrative system that replaces ebuilder, now? Or are you willing to defer connection until new construction management system is procured? Decline to answer.

- Asset Mgt.
  - Please provide a copy of excels used to manage assets. Decline to provide.
- Integrations (Examples of data only - best to provide your experience with these systems.)
  - What data wants to be exported from Peoplesoft to IWMS Financial and HR data.
  - What data wants to exported to Peoplesoft? Financial and location data.
  - What data wants to be exported from AdAstra to IWMS Class locations and schedules visually incorporated on floor plans.
  - What data wants to be exported to AdAstra? Floor layouts.
  - What data wants to be exported from StarRez to IWMS Collected room data and assignments.
  - What data wants to exported to StarRez? Floor plans with visually incorporated data.
  - What data wants to be exported from Event Scheduling Software to IWMS Event locations and schedules visually incorporated on floor plans.
  - What data wants to exported to Event Scheduling Software? Campus and floor plans.
- For Requires Connection to Work Order and Project Tracking and history
  - Please explain
    - ➢ What is the tool this is to connected to? CMMS and e-Builder.
    - ➢ Please provide what capabilities this tool has for connection
    - ➢ Is this importing data or exporting data to/from IWMS?
- Please provide budget for this RFP? Uncertain at this time.