



Purchasing Division
 2019 Washington Street East
 Post Office Box 50130
 Charleston, WV 25305-0130

State of West Virginia
 Request for Information
 33 - Service - Misc

Proc Folder: 434551

Doc Description: Req. for Info. ONLY - Point of Sale Inventory System


Proc Type: Request for Information

Date Issued	Solicitation Closes	Solicitation No	Version
2018-03-28	2018-04-10 13:30:00	CRFI 0214 SUR1800000001	1

STATE OF WEST VIRGINIA
 PURCHASING DIVISION

FOR INFORMATION CONTACT THE BUYER

Linda B Harper
 (304) 558-0488
 linda.b.harper@wv.gov

Signature X 

FEIN # 98-0358175

DATE 04/04/2018

All offers subject to all terms and conditions contained in this solicitation

State of West Virginia
Request for Information: SUR1800000001



April 10, 2018

Ms. Linda Harper
West Virginia Purchasing Division
2019 Washington Street East
Charleston, WV 25305

RE: RFI 0214 SUR1800000001 Point of Sale Inventory System

Dear Ms. Harper:

AssetWorks is pleased to present this response for the Point of Sale Inventory System RFI. AssetWorks is proposing a solution that meets or exceeds the requirements described in the request. AssetWorks, with its comprehensive suite of Enterprise Surplus software solutions, has been in the business of providing surplus and asset management solutions for over 20 years and has the reputation of being the "best of class" provider. We are a trusted business partner with hundreds of entities across the United States, including 17 State Agencies for Surplus Property for their Federal and/or State Surplus Management.

The undersigned has the authority to submit this proposal on behalf of AssetWorks in response to RFI 0214 SUR1800000001 for the State of West Virginia.

Please find below my contact information:

Company Name:	AssetWorks, Inc.
Address:	168 Industry Dr. Pittsburgh, PA 15275
Representative Name:	Sean Pugatch
Representative Title:	Sales Director
Phone:	(512) 347-7400 x1865
Fax:	(512) 347-7525
Email:	sean.pugatch@assetworks.com

Should you have any questions regarding this, please do not hesitate to contact me.

Regards,

A handwritten signature in blue ink that reads "Sean Pugatch".

Sean Pugatch
AssetWorks LLC

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Executive Summary



CONSTELLATION
SOFTWARE
INC.

AssetWorks LLC is a wholly owned subsidiary of Constellation Software, Inc. Constellation Software, Inc. is an international provider of market-leading software and services to a variety of industries, across both public and private sectors. Founded in 1995, Constellation is the headquarters for several vertical market software businesses that provide mission-critical solutions for customers in several industries. The organization has more than 10,000 employees and is publicly traded on the TSX under the symbol CSU. In 2017, CSI's consolidated revenues exceeded US \$2.47 Billion.

AssetWORKS AssetWorks is an industry –leading provider of technology and consulting solutions for asset and infrastructure intensive organizations in government, education, utilities, telecommunications, transportation, healthcare and the commercial sector. Our suite of Enterprise Asset Management (EAM) software solutions and professional consulting services enable organizations to improve maintenance practices, streamline operations, and improve accountability for mission-critical capital and infrastructure assets.

Leveraging the latest Internet, e-commerce, and mobile computing technologies, our software and industry leading expertise help our customers maximize resource utilization, improve service delivery, and achieve substantial and measurable cost savings. Whether you are doing more with fewer resources, or managing more assets with the same amount of resources, AssetWorks provides a complete solution.

The AssetWorks Surplus Management Software (SMS) system is provided using the "Software as a Service" (SaaS) approach and the system is exactly that – a service. AssetWorks built its business by delivering excellent software and services that meet the needs of our customers. Since our beginning in 1993, our core focus has been on providing asset (equipment), inventory and surplus management software for universities and state government entities. By remaining focused on this vertical market, we have become a leading provider of customizable asset management software in these environments.

AssetWorks is eager to become the long-term partner and provide the technology and services for the Point of Sale Inventory System requested by the State of West Virginia. Because of our extensive experience providing asset, surplus and inventory management for state government entities and universities, we are uniquely suited to provide a total and timely solution for this initiative. By tapping into our broad offering of asset management solutions and experience we are offering the State the following total package.

- AssetWorks Surplus Management System (SMS) – An existing web-based solution already in use by 17 State Surplus Operations, including current modules that will meet or exceed every mandatory functional requirement listed
- An Off-The-Shelf, comprehensive Surplus Management System that is already in production
- Dedicated, experienced program and project management
- A thorough experienced-based understanding of the unique demands and requirements of asset and inventory management applications
- An existing, robust, and dependable hardware and network infrastructure for providing asset management software as a service (SaaS) for state government and universities. We have provided SaaS Enterprise Asset Management applications for 17 years.

Response Requests

1. *To track federal and state inventory and create federal distribution documents and state invoices for state inventory items sold.*

The SMS solution from AssetWorks enables the State to track federal and state assets throughout the life of these assets, and retains all assets and the history of each asset and transaction after they're sold, donated, or disposed. This includes the ability to create federal distribution documents and state invoices for all Federal Donation and State Sales.

2. *To generate and print one or more multiple bar codes at one time that can be attached to inventory items for identification and point-of-sale purposes.*

Barcode printing is standard within SMS for all State and Federal Assets. Barcode printing can be done in mass as a part of the receiving process, in mass through the standard label reports, or individually on the asset details.

3. *To use configurable label sizes and types for barcode printing.*

Standardly in SMS, barcode labels are 3X2 and designed to be printed on a barcode label printer such as a Zebra printer. AssetWorks can customize the label size and type at the request of the State. The information contained on the barcode label is determined by the State and configured by AssetWorks during implementation.

4. *To store information on eligible organizations, including account numbers, eligible buyers, phone numbers, e-mail addresses, physical addresses and eligibility expiration dates.*

There are many standard fields on Donee accounts and customer profiles; however, because SMS is very customizable, the State may choose to add fields deemed necessary to the Donee and Customer profiles. Standard fields at the account level are account name, account number, type, 3040 type, government level, authorized representative, established date, renewal date, letter sent date, form return date, a memo field, and the suspension status. Standard fields on the contact level are prefix, first name, middle name, last name, suffix, title, phone number, extension, fax number, email, account number, and authorization.

The screenshot displays the 'Federal Donations' section of the AssetWorks software. On the left is a 'Federal Donations Sidebar' with options: Donations, Donee Accounts (selected), Donee Contacts, and Invoices. The main area is titled 'Donee Account Detail' and contains a form with the following fields:

Account Number *	2722222
Account Name *	JOE'S AUTOWORKS
Corporate Phone	
EIN	
Type *	SBA - SMALL BUSINESS ADMINISTRATION
3040 Type	SECTION D
Government Level *	OTHER
Authorized Representative	JOE JONES
Established Date *	07/08/2010
Renewal Date	07/08/2020
Letter Sent Date	
Form Return Date	
Suspension Status	No Open Issues
Memo	

At the bottom of the form are 'Cancel', 'Delete', and 'Save' buttons. Below the form are expandable sections: Addresses, Suspensions, Donee Contacts, Account Ledger, and Documents & Images.

(Partial Screenshot of a Donee Account)

5. To assign account numbers to eligible organizations based on a format predetermined by the 'M/SASP.

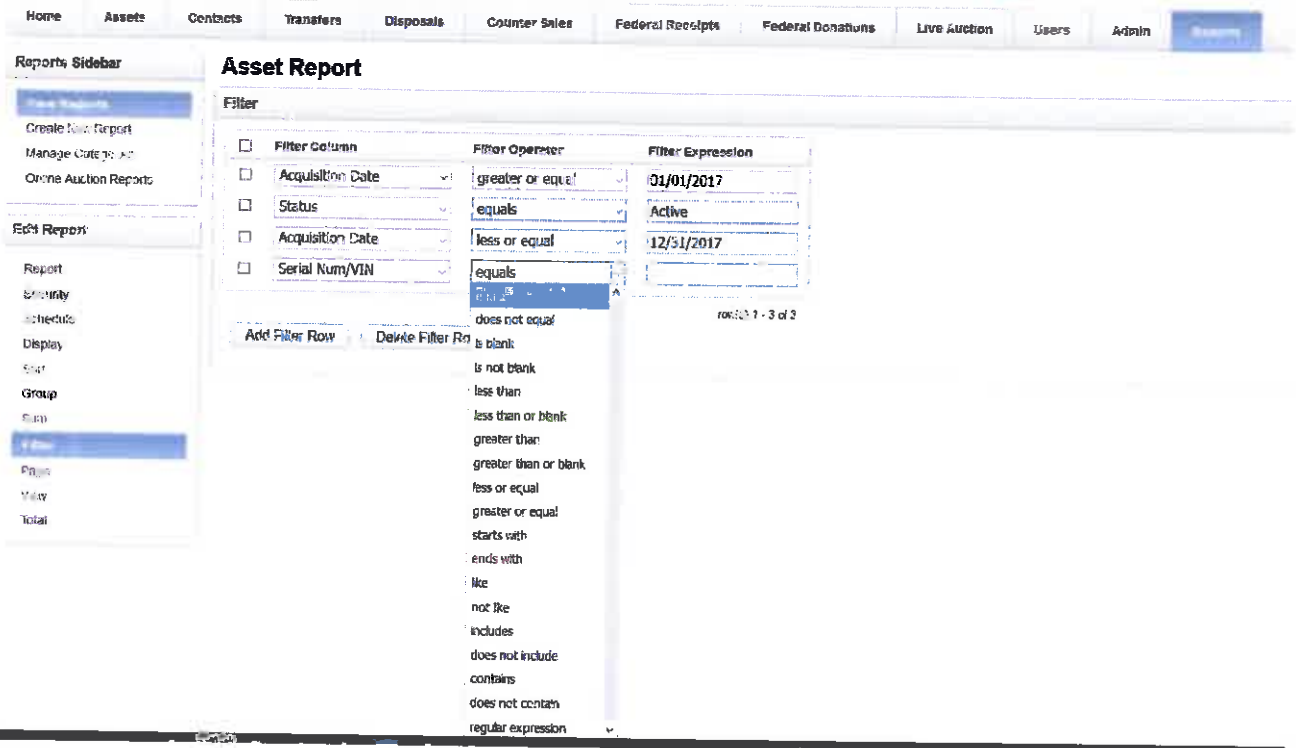
Each account number is determined by the State.

6. To interphase with GSAXcess.gov.

AssetWorks Federal Surplus Module integrates directly with GSAXcess by importing all of the Form SF-123's applicable fields, and all DTIDs associated with the Form 123, directly in the software on a nightly basis. Each morning, surplus staff can log in, see what's been allocated, and receive transfers.

7. To search and recall inventory items.

Aside from the simple search based upon Asset Number, Description, and/or Status, SMS employs a unique and simple query tool for users to search the asset database for Active and/or Inactive assets. Users can save all search parameters as well as view and delete saved searches. When the user selects the Advanced Search button, an ad hoc report generator is displayed. The user can then enter in multiple query settings to isolate the group that matches those settings. This screen supports many query options such as "Exact Match", "Partial Match at Beginning", "Partial Match at End", "Partial Match Anywhere", and "Non-Match" on each of the fields. In addition, filters can be set on multiple fields simultaneously.



(Partial Screenshot of the ad-hoc search/report builder)

8. To allow upload of inventory from an excel spreadsheet or by some other means.

Through the implementation process, AssetWorks will migrate the State's current surplus inventory data. After implementation the State may import a .CSV file of asset data onto a Surplus Transfer through the surplus transfer creation process, or the State may use the import area of the Admin menu to import and create asset records bypassing the Surplus Transfer process.

9. To allow the WVSASP to create users and modify access levels of these users.

The Users module of SMS includes the ability to create new users, assign them to roles/profiles, assign users to specific Organizations, reset passwords, suspend users, and modify permissions, and other similar user administration tasks.

AssetWorks can also interface to a Single Sign On, Active Directory, or LDAP for user creation, authentication, and profile assignments.

10. To allow adhoc reporting at no additional charge to the WVSASP.

Ad-hoc reporting on asset and transactions is standard in SMS at no additional cost to WVSASP. Our ad-hoc report builder is integrated with our ad-hoc search. Please see the response to point #7 above.

11. To use wireless scanners that can interface and achieve real time scanning with point of sale system.

Wireless, Bluetooth scanners can be utilized, in real time, to add assets to a sales transaction at a terminal while checking a customer out. Also, utilizing tablets with a Bluetooth barcode scanner, a

customer service representative could be on the sales floor with customers creating sales transactions, real time, in SMS.

12. To allow multiple items to be invoiced on one invoice.

All assets on a single sales transactions for State Surplus will appear on a single invoice. All assets on a single Federal Donation will appear on a single Federal invoice. In the example below, all assets on this Federal Donation are on invoice number 92.

Federal Donation Detail

Donation Number: 1600152
 Creation Date: 10/20/2016
 CSR: [Redacted]
 To Donee Account: 2222222 - JOE'S AUTOWORKS
 Donee Contact: JONES, JOE
 PG Number: [Redacted]
 Remarks: [Redacted]
 Current Balance: \$6,419.00
 Edit

Documents & Images

Add Assets

Asset Number: [Input] Quantity: [Input] Service Charge: [Input]
 Add Asset

Assets

View	Asset Number	Description	Quantity	Service Charge	Approval Status	Comments	Freight Cost	Repair Cost	Invoice
	47-014-5646-54-001	7021 - ADP CENTRAL PROCESSING UNIT (CPU, COMPUTER) DIGITAL (7021)	1	\$50.00	Approved		\$5.00	\$10.00	92
	47-014-5646-54-007	1005 - GUNS, THROUGH MM (1005)	1	\$50.00	Approved		\$5.00	\$10.00	92
	47-016-5465-46-003	gun	1	\$150.00	Approved				92
	47-018-5465-45-001	test	1	\$1,000.00	Approved				92

Download

row(s) 1 - 4 of 4

(Partial Screenshot of a Federal Donation)

13. To maintain historical costing with duplicate invoice reprint.

All sales and donation transactions are retained within the SMS forever. There is no archiving, deleting, or removing of this data, and they are easily searchable to bring up and reprint an invoice.

The screenshot shows the AssetWorks software interface. At the top, there is a navigation menu with tabs for Home, Assets, Contacts, Transfers, Disposals, Counter Sales (which is highlighted in blue), and Federal Rec. Below the navigation menu is a sidebar titled 'Counter Sale Sidebar' with options for Sales, Accounts, Buyers, and Counter Sale (which is highlighted in blue). The main area is titled 'Search Counter Sale Invoice' and contains a search form with the following fields: Invoice, Counter Sale, To Account, To Person, Tag Number, Lot Number, Start Date, End Date, and Paid. There is a Search button at the bottom of the form.

(Partial Screenshot of Invoice Search)

14. To allow different levels of taxation on the invoice that can be modified by the WVSASP. State and City sales tax percentages will be editable fields when creating a sales transaction. These fields will default to a predetermined percentage, but may be updated when needed. The buyer/Donee account can denote customers who are tax exempt, and the system will automatically not charge tax to these customers. Also, a business rule will be created within SMS that all vehicle, and any other applicable classifications, assets will not be taxed.

Response Questions

1. Will additional software be needed to do reporting? If yes, what additional software will be needed?

No, SMS is built with a robust ad-hoc reporting tool, as well as standard reports for both Federal and State Surplus.

2. Is this a commercial off the shelf software? If not, please describe the approach to meeting the agency's needs.

This is a commercial off the shelf surplus solution which was designed and developed specifically for State and Federal Surplus organizations.

3. What is the minimum hardware operating system?

AssetWorks is proposing a Vendor hosted, Software as a Service (SaaS) solution. All that is required is internet access.

4. What type of scanners are used with the software?

AssetWorks recommends the use of Socket Bluetooth scanners; however, this specific Bluetooth scanner is not required, and the State may select a different scanner.

5. *Can the system reside and operate from the agency's Microsoft Windows Server 2012 R2 based data server located onsite in Dunbar, WV? If not, please describe the required operating environment.*

AssetWorks is proposing a Vendor hosted, Software as a Service (SaaS) solution which resides on the Amazon cloud.

6. *How many eligible organizations can be stored?*
Unlimited

7. *Does your software do notifications of eligibility expirations?*
Yes, email notifications will go out to Donees as they approach their expiration date.

8. *What is the maximum number of assets that can be stored?*
Unlimited

9. *What type of warranty is offered on the software and required hardware?*
AssetWorks includes software warranty language as a part of our standard terms. AssetWorks can provide these terms upon request from the State. If awarded through a formal bid process an opportunity, AssetWorks is prepared to discuss a mutually agreed contract with the State containing all relevant terms for its services consistent with the Customer Terms and Company's response.

Hardware warranties are subject to the standard manufacturer's warranty. Most hardware manufacturers offer an extended warranty, and if the State purchases hardware through AssetWorks, AssetWorks can offer an extended warranty offered by the manufacturer.

10. *What type of customer support is offered?*
Unlimited phone and email support Monday – Friday 8am - 5pm CST. Support is 100% handled by AssetWorks employees and is not outsourced. Our support team utilizes Z
AssetWorks' goal is to provide world-class customer support on which our customers can consistently depend. Our customer support, engineering, and quality assurance departments are managed jointly, so that our support personnel are always well informed of new product functionality and issues can be quickly resolved.

AssetWorks offers a variety of support tools to ensure successful utilization of our applications. All screens include context sensitive help. Click on the help link on a particular screen, and the system displays content describing that screen and explaining any processes involved. Some help screens also contain "Show Me" links, which are on-line tutorials. Complete with audio narration, these tutorials help the user see first-hand how the process works.

AssetWorks also includes "Getting Started" guides and tutorials to help new users navigate the system. The Sign-In screen contains a "Need help signing in?" link that users can click to get assistance if they forget their username or password.

Users can request support or ask questions from within the application by clicking on the "Support" link available on every page. This feature immediately notifies support representatives by placing the request in a queue for the next available rep. This also opens a ticket in our helpdesk ticketing system,

Zendesk. The customer is notified immediately that their ticket has been created. AssetWorks also offers our customers a Zendesk portal for video tutorials and FAQ's. The support team usually answers requests within a few minutes. Depending on the nature of the issue, answers can be in the form of return email or direct calls to the user.

Lastly, users can simply pick up the phone and call a toll free number for telephone-based technical support. However, in our experience most end-user questions are procedural in nature and are usually best answered by a subject matter expert (SME) within the customer's organization. If that SME is unable to answer the question or if the question is technical in nature, the support can be transferred to AssetWorks.

In summary, system, application, and user support is available in the following formats:

- Context Sensitive Help that includes the ability to add internal procedures in the format of documents and/or tutorials
- Getting Started Guides and On-line Documentation
- Embedded Application Email Support
- Toll Free Telephone Support Lines

11. Are software upgrades included in annual fee?

Yes, AssetWorks' development team works in 2 iterations called sprints. Every 2 weeks there is a software version update, and these updates are included within the annual hosting, maintenance, and support fee. Because AssetWorks hosts the solution, AssetWorks is responsible for all upgrades, testing, and roll outs for upgrades.

12. Can the software import Microsoft excel and csv files?

SMS can import .CSV files. An excel file can easily be converted to a .CSV format for the purpose of an import.

13. What type of training is offered?

AssetWorks offers onsite and web based trainings. For an implementation such as this, we recommend an onsite training. AssetWorks employs a train the trainer technique when training the staff. Train the trainer is an approach that AssetWorks has been doing for a number of years, and will be a very concise training that includes manuals which the staff may use in the future to continually reference and train new staff. This will enable the staff to pass knowledge on to other users of the system, along with written training documentation provided by AssetWorks.

14. How will the installation be, on site or remote?

There is no installation with our solution. Implementation will mainly occur remotely with weekly or biweekly project meetings.

15. Does the software generate "Homeless and Needy" and "3040" reports?

Yes, SMS has standard 3040 reports, and can easily create the "Homeless and Needy" report as a part of implementation.

STATE AGENCY QUARTERLY DONATION REPORT OF SURPLUS PERSONAL PROPERTY		DATE (month and year): 04/01/2014 - 05/30/2014	FORM APPROVED OMB NO.
TO		FROM (Given Name of Reporting State Agency)	
A. BEGINNING INVENTORY		6,785,092.76	
B. RECEIPTS			
1. Federal Agency:	2,128,760.90	3. From Other States:	0.00
2. From Overseas:	0.00	4. Other Receipts/POS Adjust:	27,173.43
			5. TOTAL:
C1. PUBLIC AGENCY DONATIONS			
a. Conservation:	0.00	g. Economic Development:	0.00
b. Education:	440,675.92	h. Parks and Recreation:	0.00
c. Public Health:	11,846.62	i. Public Safety:	46,970.03
d. Assistance to the Homeless:	0.00	j. Assistance to Impoverished Families or Individuals:	0.00
e. Assistance to Older Americans:	325.71	k. Two Or More Of The Above:	317,805.26
f. Other:	242,598.64		
			I. TOTAL:
C2. NON-PROFIT DONATIONS			
a. Education:	0.00	d. Health:	0.00
b. Assistance to the Homeless:	0.00	e. Assistance to Impoverished Families or	0.00
c. Assistance to Older Americans:	0.00		
			I. TOTAL:
D1. MISC. TRANSFERS			
a. Transfer To Other State Agencies:	0.00	d. Return to Federal Agencies:	0.00
b. Transfers To The SASP:	0.00	e. SBA Transfers:	0.00
c. SEA Transfers:	7,292.84	f. Veteran's Organizations:	0.00
			g. TOTAL:
D2. MISC. NON TRANSFERS			

(Partial Screenshot of 3040 Report)

16. Can the database be exported to Microsoft excel and csv files?

Most standard reports are downloadable to PDF, Excel, or Excel without formatting. All reports using the native report builder within SMS are downloadable to PDF or a csv file format.

17. Are invoices sequentially numbered?

The State determines what the entire invoice will look like and how it will be formatted, including a sequential numbering sequence. The State will let AssetWorks know the formatting and start of sequential sequence.

18. Is the software web based and accessible through mainstream tablets and smartphones?

Yes, the software is web based and accessible through tablets and smartphones. AssetWorks recommend the use of a tablet to perform tasks within SMS.

19. Can the software save public customer information for future invoicing?

Yes, all customer account and contact information is retained within SMS for future purchases/donations and invoicing.

20. Does the software allow discounts when invoicing? If so, how? Is the discount applied per line item, per invoice or both?

State of West Virginia
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AssetWorks can configure discounts to be applied per line item and/or per invoice. A discount per invoice would be entered upon the creation of the transaction, and a discount per line item would be entered on each line item upon check out.

21. Does the software require a specific format for invoices or can they be customized?
As a part of standard implementation, AssetWorks will configure invoices based upon the State's requirements.

Appendix A: Signed Addendum Acknowledgement



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 2019 Washington Street East
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FOR INFORMATION CONTACT THE BUYER

Linda B Harper
 (304) 558-0488
 linda.b.harper@wv.gov

Signature X 

FEIN # 98-0358175

DATE 04/04/2018

All offers subject to all terms and conditions contained in this solicitation

ADDENDUM ACKNOWLEDGEMENT FORM
SOLICITATION NO.: SUR1800000001

Instructions: Please acknowledge receipt of all addenda issued with this solicitation by completing this addendum acknowledgment form. Check the box next to each addendum received and sign below. Failure to acknowledge addenda may result in bid disqualification.


Acknowledgment: I hereby acknowledge receipt of the following addenda and have made the necessary revisions to my proposal, plans and/or specification, etc.

Addendum Numbers Received:

(Check the box next to each addendum received)

- | | |
|--|--|
| <input checked="" type="checkbox"/> Addendum No. 1 | <input type="checkbox"/> Addendum No. 6 |
| <input type="checkbox"/> Addendum No. 2 | <input type="checkbox"/> Addendum No. 7 |
| <input type="checkbox"/> Addendum No. 3 | <input type="checkbox"/> Addendum No. 8 |
| <input type="checkbox"/> Addendum No. 4 | <input type="checkbox"/> Addendum No. 9 |
| <input type="checkbox"/> Addendum No. 5 | <input type="checkbox"/> Addendum No. 10 |

I understand that failure to confirm the receipt of addenda may be cause for rejection of this bid. I further understand that any verbal representation made or assumed to be made during any oral discussion held between Vendor's representatives and any state personnel is not binding. Only the information issued in writing and added to the specifications by an official addendum is binding.

Asset Works LLC
Company

Authorized Signature
07/04/2018
Date

NOTE: This addendum acknowledgment should be submitted with the bid to expedite document processing.
Revised 6/8/2012