Template Version:

FORM N: PROPONENT PROPOSAL - REQUIREMENTS

Instructions for filling out Form N: Proponent Proposal - Requirements

1. Complete Form N: Proponent Proposal - Requirements
2. Follow the proposal instructions in the Proposal Instructions section below

PROPOSAL INSTRUCTIONS

1. **For each Mandatory requirement, provide a Y (Yes) or N (No), indicating whether the proposed scope of your solution can meet the requirement**. Y indicates that the proposed scope of the solution you are proposing will meet the requirements listed in the requirement statement. N indicates that the proposed scope of the solution you are proposing will not meet the requirements.

2. **For each Non-Mandatory requirement indicate which Proponent response code that best describes the proposed scope of your solution:**

    Y – Available Out of the Box: the solution for the requirement is currently available in the existing product "out of the box". Configuration may be required to enable the feature (requirement will be met through changes to settings of tables, switches, and rules without modification to the source code). Requirement is installed and operational at other sites and can be demonstrated to the City of Winnipeg.

    C – Available via Customization: the solution for the requirement is not currently available in the existing product "out of the box", but will be incorporated via customization of the solution components. Requirement will be met through changes to the source code which would require analysis and re-application during updates, upgrades, or when applying software patches.

    F – Future Availability: the solution for the requirement is not currently available, but will be available in an upcoming planned product release.   If this option is indicated, include the date/timeframe when the requirement will be available for implementation, which should be either:
    a) A planned release up to 3 calendar months after the RFP.1080-2017 competition close date, where an additional Proponent response code of **3** should be provided;
    b) A planned release up to 6 calendar months after the RFP 1080-2017 competition close date, where an additional Proponent response code of **6** should be provided, or
    c) A planned release up to 12 calendar months or longer after the RFP 1080-2017 competition close date, where an additional Proponent response code of **12** should be provided.

    3 – Third Party Supplied: the solution for the requirement is expected to be met by using a third party vendor's existing product, either integrated or non-integrated.

    N – Not Possible: the solution for the requirement will not be provided by the Proponent.

3. For each requirement in which the City has noted as "Please Describe", and/or asked specific questions, Bidder must include additional information, referencing the specific Ref #, at the end of the section and/or as appendices. **Ref # is highly important to ensure linkage between requirement and description.**

Notes:

1.   An omitted response will be assumed to be the same as a response code of "N".
2. Any deviation from the response code will be re-coded at the discretion of the City of Winnipeg.
3. Responses of Y, C, F and 3 to mandatory and non mandatory requirements assumes the requirement is in the scope of the Proponent's proposal and will be included in a budget proposal if the Proponent's proposal is short-listed.

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A. Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y,N)**
1. General Requirements			
Staffing system must track staffing for all sections (areas) of the WFPS.		G1.1	
Staffing system must allow for tracking of different categories of employees	Exempt, Fire, EMS, Dispatch, support staff, hourly vs salary, part-time, full-time, on-call rotation (w/guaranteed # of hours)	G1.2	
Staffing system must allow for independent scheduling and tracking of different union contract rules and non-union rules.	Each section has separate staffing protocols	G1.3	
Must maintain compliance with federal and provincial labour laws, collective bargaining agreements, and other organization policies ensuring compliance		G1.4	
System must have an undo feature so that users are able to undo any changes they have made. This would be similar to the undo function found in other business applications such as Windows or Excel.	If a change is made to a staff member schedule in error then the user must be able to undo the change. There must be no time limit on when a change can be made to a staff schedule by an administrator.	G1.5	
Must be able to define different shift patterns within an organization or department.	• Exempt work Mon - Fri • Operational staff work 4 on 4 off • Must be able to define reoccurring shift schedules with a tool similar to the Outlook reoccurring appointment tool. • Create a part-time shift pattern with a rotational cycle to be defined by the system administrator • Must be able to define multiple rotational cycles based on pre-defined criteria	G1.6	
The system must allow the City to create and edit business rules to govern all scheduling and leave issues applicable to full and part-time personnel and civilian personnel in multiple collective bargaining contracts.		G1.7	
The system must allow user-defined and editable business rules to govern leave policies, set schedules, set staffing levels, fill vacancies, handle off-duty work schedules, call out for specialty units, and other types of circumstances that might affect staffing and scheduling.		G1.8	
It must be possible to define payroll codes to be used in tracking attendance in the daily schedule		G1.9	
2. Personnel			
The system must be capable of automatically receiving basic personnel data from an external database such as a staffing solution		P1.1	
The system must be able to record or link to employee skill sets or credentials to use for scheduling.	For example only Hazardous Material trained staff must be scheduled on a Hazmat unit.	P1.2	

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A. Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y,N)**
3. Scheduling			
It must be possible to assign payroll (status) codes and associate them to each shift personnel work	Be able to associate codes such as: a) regular time b) overtime pay c) overtime banked d) WCB e) Sick paid by union	P1.3	
Must be able to define a minimum staffing level for each hall and area.		P1.4	
Must be able to define a minimum staffing level for each hall and each shift and area separately	Each hall could have a different minimum staffing level for each shift based on operational needs.	P1.5	
Must be able to define a minimum staffing level for each hall for time of day (day shift vs. night shift) and each type of unit.	Each hall could have a different minimum staffing level for each shift based on time of day (day/night). This also needs to take into consideration qualifications.	P1.6	
Must be able to define a minimum staffing level for each District Chief Area which must correspond (incorporate) the minimum staffing level for each hall and time of day).		P1.7	
Must alert user when staffing levels fall below requirements ensuring proper coverage is maintained		P1.8	
Alerts must be available to notify schedulers of shortages in specialties and rank.		P1.9	
Must be able to record employee vacation time in the schedule in advance		P1.10	
4. Education			
The system must be capable of tracking public education events		E1.1	
When a user participates in a training session, data must be record	Link records must include security required to maintain confidentiality	E1.2	
5. Reporting and Notifications			
System must maintain a complete audit trail of all interactions/notifications with personnel for historical audits.		R1.1	
6. Technical			
The system must communicate in an IP network		T1.1	
Must be capable of operating in a Windows Server 2008 r2 or higher environment.		T1.2	
System backups must not negatively impact system performance	System backups must not negatively impact system performance. Vendor must propose the best practices for archiving data from the primary database.	T1.3	
The vendor must provide the database schema, with annual updates	The vendor must provide the database schema, with annual updates	T1.4	
The vendor must provide the database dictionary	The vendor must provide the database dictionary	T1.5	
The vendor must provide detailed system administration documentation	The vendor must provide detailed system administration documentation	T1.6	

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A. Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y,N)**
The vendor must provide system administration training	The vendor must provide system administration training	T1.8	
The vendor must provide functional documentation	The vendor must provide functional documentation	T1.9	
The vendor must provide functional test plans and test scripts	The vendor must provide functional test plans and test scripts	T1.10	
The vendor must provide a system architecture diagram	The vendor must provide a system architecture diagram	T1.11	
Database backup	The system must provide the ability for on line/hot backups of the database without impairing system operation	T1.12	
Failover capability	The system must have the ability to fail over to another server/system	T1.13	
The system must support current industry standard infrastructure formats	The system must be capable of operating in a Virtual Machine environment	T1.14	
The system must require a user name and password for each authorized user.	User names must be definable by the system administrator.	T1.15	
The system must allow multiple levels of security access from end-user to agency supervisor/administrator		T1.16	
It must be possible for the system administrator to define what the security levels are and (if necessary) create custom security groups		T1.17	
Business rules must be able to be either shared or not shared as appropriate		T1.18	
The system administrator must be able to define the format for user passwords		T1.19	
The system administrator must be able to define whether passwords expire on a scheduled basis or not		T1.20	
If passwords are set to expire, a system warning must be presented to the user		T1.21	
Any system warning about password expiry must be configurable as to content and how far in advance it will be presented to the user		T1.22	
The system must allow temporary duty assignments for administrators allowing modifications to security on a temporary basis	Example: When a supervisor goes on leave and the person filling in will assume their responsibilities in while they are away.	T1.23	
It must be possible to assign individuals a higher security access for a specific time period.		T1.24	
System must enable the system administrator to designate under appropriate security authorization, application administrators and sub administrators to enable assignments and approve schedules and exceptions.		T1.25	
The system must maintain a complete audit trail for all transactions performed in the system.	At a minimum, the audit trail must include data/time stamp, action taken, changes made, user id	T1.26	

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A. Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y,N)**
It must be possible for the system administrator to select the tables or columns to be applied to the audit trail. This will allow the system administrator to manage database performance and limitations as required.		T1.27	
It must be possible to use Active Directory log on so that a single sign on profile can be used.	Non-AD users must be able to access via other sign on methodologies.	T1.28	
It must be possible to run scheduled back up of the database based on pre-defined practices.		T1.29	
The system must be architected to work in a high availability environment	In the event of failure of all or part of the system (hardware or software), the system must be able to fail over to backup infrastructure (same site of off-site location) in a minimal amount of time without any loss of data The system is expected to be available 7x24x365	T1.30	
Recoverability - If for any reason there is a need to restore the system to a backup copy of the database, then the system must operate without error based on the data as of the time of the backup		T1.31	
7. Corporate			
The system must comply with all requirements of the Manitoba Freedom of Information and Protection of Privacy Act (FIPPA) , Personal Health Information Act (PHIA)		C1.1	
Vendor must support/work with standard vendors for various interfaces including CAD and PeopleSoft solutions		C1.2	
Vendor must provide a warranty for the product/solution		C1.3	
The vendor must be able to provide a process for system upgrades		C1.4	
The vendor must provide software configuration training to identified super users		C1.5	
Vendor must provide 7/24/365 support	• The vendor must provide an agreed service level agreement • The vendor must provide a response within a certain time frame to calls for assistance • The response time must be based on the priority of the request • The vendor must provide first, second and third level support	C1.6	

B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
1. General Requirements			
Staffing system should be a single source of data entry wherever possible.	Users should not have to enter information multiple times in the system.	G2.1	
The system should provide a function that allows testing to verify business rule accuracy and effect prior to implementation		G2.2	
Should be able to define organization or departments.		G2.3	
Should be able to define units within an organization or department.		G2.4	
Should be able to define an unlimited number of shift patterns within the system.	Shift patterns may be related to permanent shift or ad-hoc shift schedules.	G2.5	
Each unit should be able to have its own set of business rules defined.	Fatigue rules How overtime is assigned.	G2.6	
Each business rule should have fields to allow for the tracking of Effective Start Date and Effective End Date. The start date would be utilized to show when the rule takes effect and the end date would indicate the date that the rule was retired.	This will allow for changes to be made in advance and take effect on a specific date (for example when a new contract comes into effect) It should be possible to enter a start date and leave the end date blank until the end date is known (for example contracts can be extended or carried forward during negotiations)	G2.7	
The system should provide a means to update and modify existing business rules, collective bargaining rules, and operating protocols and to schedule its implementation based on a date and time and set of criteria.		G2.8	
Should be able to assign colour code to specific shifts defined in the system		G2.9	
Should be able to define positions within each organization or unit		G2.10	
Should be able to associate requirements, criteria or capabilities to a defined position.		G2.11	
Should be able to define "bank" amounts that can be carried over to the next year.	This includes personnel vacation banks, gratuity banks, etc. Fire doesn't carry over banks Paramedic carry over some banks but have different rules for different banks.	G2.12	
It should be possible to define sub codes for payroll codes	Record an Overtime payroll code with a sub-code that represents the reason for the overtime. Record miscellaneous code with a sub-code for specific reason	G2.13	
It should be possible to require the use of sub codes with certain payroll codes.	For example if the payroll code of OT is used, a sub code would be a mandatory field.	G2.14	
The system should allow an unlimited number of user-defined working and non-working codes and sub codes.		G2.15	

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B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
The system should allow the system administrator to create pick lists and shift patterns along with other required system information fields that are viewable by one or more agencies.		G2.16	
The system administrator should be able to define the retention period for system data.		G2.17	
System should allow for archiving system data.		G2.18	
System should prevent users from one agency accessing data for another agency unless authorized		G2.19	
System's reporting feature should prevent users from one agency accessing data for another agency unless authorized		G2.20	
System should allow certain data and/or functionality to be shared across agencies e.g. scheduling rules, calendars, etc. based on configurations defined by the system administrator or designate.		G2.21	
System should allow for each agency to have their own staffing rules based on their own collective agreements		G2.22	
System should allow for an unlimited number of rules		G2.23	
System should allow for the definition and scheduling of holidays recognized in the various contracts.		G2.24	
It should be possible to assign holidays to pre-defined shift patterns.	Holidays recognized by unions may differ, so it is important that the system be flexible enough to link to some employees but not all.	G2.25	
2. Personnel			
Should be able to track multiple date milestones for each employee such as hire date versus start date versus seniority date		P2.1	
Can track the history of positions held by each employee		P2.2	
Should be able to associate skills/qualifications with each employee. Skills are then utilized to match employees to positions.	Would be good if this could be added in from the hire date start. It should be possible for designated users to modify skills associated to a user	P2.3	
It may be possible for an employee to temporarily suspend skills/qualifications based on pre-defined business rules.	For example, an employee may not be able to act in a senior capacity for a period of time. As a result they should be temporarily removed from the acting list.	P2.4	
Should be able to capture and maintain various predefined time banks for each employee.	"Time banks include: Gratuity Vacation Statutory holidays Sick"	P2.5	
Should be able to track the history of all return to work or modified duty events for an employee.	Would like a notification to go to the supervisor when the DTA is in place and when it ends.	P2.5	

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B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
Should be able to mark an employee unavailable and associate the appropriate unavailable code (payroll code).	Should be able to record appropriate payroll code to the status (long term sick, WCB, return to work, etc.). Unavailable status should be visible in all views so it is easily seen by all users. Status should have an optional expiry date field which if used would change the user back to available status on the specified date.	P2.6	
System should be capable of allowing users to electronically submit requests for use of accrued leave including anticipated accruals for vacation and holiday as well as notice of availability of special assignment and overtime availability.		P2.7	
Employee should be able to modify their personal information and notification preferences through a telephony or web based user interface.		P2.8	
The system should be capable of automatically receiving basic personnel data from an external database such as a staffing solution		P2.9	
The basic personnel data should be consumed by the RMS and automatically create a personnel record using (Including but not limited to) the following information:	• First Name • Last Name • Common Name • Rank • Shift • Assignment	P2.10	
The system should allow for the manual entry of personnel as required		P2.11	
There should be a mechanism for tracking career information including but not limited to:	• Rank assignment • Date of promotion • Position held	P2.12	
The system should allow for tracking medical information against a personnel record	Information should be controlled by security so that only authorized persons have access to the information	P2.13	
The system administrator should be able to define certain roles and assign personnel to those roles.	Roles should allow users to be added to specific picklists such as Investigator, Inspector etc.	P2.14	
Each personnel record should be linked to any certifications that are assigned to each person	Certifications should include the date it was earned and, if applicable, the date that it expires	P2.15	
If someone has both a personnel record and a user account, the two should be linked		P2.16	
From a personnel record, a user should be able to identify all events that person has been linked to including but not limited to:	• Incidents • Training • Inspections • Public Education	P2.17	
The system should allow for tracking of contact information for the personnel including but not limited to:	• Primary phone number • Secondary phone number • Email • Secondary email • Name	P2.18	

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B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
The system should be able to track driver's license information including any endorsements and restrictions for each personnel member.	Should be possible to report on various criteria including expiry dates.	P2.19	
The system should be able to record or link to employee skill sets or credentials to use for scheduling.	For example only Hazardous Material trained staff should be scheduled on a Hazmat unit.	P2.20	
3. Scheduling			
Should have the ability for supervisor to sign off on absence and/or attendance records.	Absences must be signed by supervisor. Acting pay must be signed by supervisor.	S2.1	
Overtime should be signed off by appropriate personnel.		S2.2	
Acting time should be signed off by supervisor and coded appropriately.		S2.3	
Should be able to track the balance of Stat holidays on an ongoing basis to ensure it levels out over the course of the year.	See rules around stat days and short term or maternity leave time as this impacts the allotment of hours in the various banks.	S2.4	
Should have option to define staffing levels for each unit type assigned to a hall		S2.5	
Should be able to assign criteria/qualifications to each position on apparatus, in hall by shift.		S2.6	
Should be able to manage a single crew being able to be assigned to 2 apparatus (cross staffing)		S2.7	
It should be possible to define a position as mandatory or optional within the scheduling system.		S2.8	
Should allow the user to assign a specific # of hours that a person is allowed to work so that a warning is presented when they are going to exceed the # of hours.		S2.9	
Should be able to create ad-hoc overtime shifts for special events		S2.10	
Should be able to identify overtime shifts which are billable or included in other cost recovery actions		S2.11	
Should be able to create ad-hoc shifts to record shifts being worked by employees on return to work or modified duty shifts.		S2.12	
Should be possible to track "on call" personnel.		S2.13	
Authorized users should have the ability to create requests for personnel with specific skills sets to be seconded or temporarily allocated to another organizational unit.	For example, the training section should be able to request instructors or Acting Training Officers for training classes. It should be possible to schedule these in advance.	S2.14	
Schedules should be viewable for at least 24 months in advance		S2.15	
Should be able to alter employee's permanent position as required	Staff movements are required on an ongoing basis due to retirements, promotions and other staff changes.	S2.16	
The date of the transfer should be definable by the agency.		S2.17	
Should be able to adjust staffing (ad-hoc) based on pre-defined business rules.		S2.18	

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B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
It should be possible to define business rules for retraining requirements if an employee has not been assigned to a position for a defined period of time	For example, if an employee has not worked in a Suppression position for more than 6 months, they must receive sign off from Training before being able to work in Suppression.	S2.19	
Should have the ability supervisor to sign off on staffing changes.		S2.20	
It should be possible to mark a position/employee or group of employees as not available for movement or staffing changes on a given day or set of shifts.	When training is scheduled, an employee may be marked as "Do Not Move" to accommodate the training.	S2.21	
Should be able to view the minimum staff number defined for each hall	Each hall has a minimum staffing level. This number should be visible to defined user levels.	S2.22	
Should be able to view the minimum staff number defined for each hall and each shift		S2.23	
Should be able to view the minimum staff number defined for each hall for time of day		S2.24	
Should be able to view the current staffing levels for each hall and shift and by time of day		S2.25	
Should be able to view the minimum staff for each District Area		S2.26	
Should be able to view the total strength assigned to each hall and shift accounting for all staff permanently assigned to each hall on each shift.		S2.27	
Should be able to view all positions for each District Area or EMS district		S2.28	
Should be able to view all officer positions for all halls		S2.29	
Should be able to view all officer positions for each District area		S2.30	
Should be able to view all officer positions by shift and hall or organizational unit		S2.31	
Should be able to create a view of the personnel qualified to "act" in a senior capacity.	View should be able to be shown for the whole department, an organization/department, shift or other criteria. Must be able to decline to act in a senior capacity on a one-year basis.	S2.32	
Should be able to filter the view of the personnel qualified to 'act' in a senior capacity by single or multiple criteria so that the user can see only acting D/Cs or only acting Captains etc.	Filter by the one or more of the following criteria: a) Organizational unit b) Acting capacity c) Shift d) Seniority	S2.33	
Should be able to create a view to show upcoming vacations	View should be able to be shown for the whole department, an organization/department, shift or other criteria. This is also a view that could be applied to an individual user.	S2.34	
Supervisors should be able to view all requests for leave using defined criteria	View should be able to be shown for the supervisors assigned staff members.	S2.35	

B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
Should be able to view schedules of all employees with defined qualifications or skills by single or multiple criteria.	Filter by the one or more of the following criteria: a) Organizational unit b) Acting capacity c) Shift d) Seniority e) Specialty (qualification/skill)	S2.36	
Should be able to view schedules of all employees with the qualification Acting Training Officers and Instructors with specific skill sets		S2.37	
Should allow for employees to trade shifts based on predefined business rules.		S2.38	
Shift trades may involve 2 or more employees and all related trades should be tracked. All exchanges should be recorded with the relationship to all other related trades.		S2.39	
Shift trades on Statutory holidays should be flagged so that the payroll is able to adjust any stat pay for all involved in the shift trade.		S2.40	
The system should record and display all employees included in the shift trade (who was scheduled to work, as well as the actual person who worked)	Would be good if the system could alert if someone from the shift trade is booked off sick ahead of time. Would like a flag for the Platoon Chief of the shift that the person belongs to which would indicate that a sick note is required.	S2.41	
Should be able to track all time earned or owed outside regular work hours.		S2.42	
Earned time must be used by the end of each year. The system should provide ongoing alerts or notifications regarding status of earned and owed time for each user.	365 days from the first shift in the trade.	S2.43	
The system should allow for the users to perform private shift trades	A private trade occurs when a trade happens directly between 2 or more people. Must be based on qualifications.	S2.44	
Staff allocation of vacation should be managed within the scheduling system		S2.45	
It should be possible to allocate staff vacations on an annual basis based on predefined business rules.		S2.46	
Employees, vacation requests should be placed in a "pending" type status when initiated pending approval by person in authority.		S2.47	
Employees, vacation requests should be approved by person in authority before they are accepted.		S2.48	
The system should allow for vacation bidding based on defined business rules		S2.49	
The system should allow users to trade vacation spots based on defined business rules		S2.50	
When annual leave entitlements have been assigned to a member, the system should have a mechanism for alerting the member of the assigned time and provide them a way to acknowledge the time.		S2.51	

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B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
Employee should be able to record a "book off" when they are unavailable to work.		S2.52	
When booked off, the employee should be able to record a "book back" when they become available to work.		S2.53	
Both the book off and book back processes should be able to be automated (phone or electronically)		S2.54	
When an employee books off or on, specific data should be captured	Type of leave, reason for leave (i.e. if a family illness - which it is related to - mother, wife, child etc.)	S2.55	
Notifications of all books off/on should be sent to designated supervisory personnel.	Employee's immediate supervisor must be notified. It should be possible to turn notifications on or off on a case by case basis.	S2.56	
Should have a notes field where information related to the vacancy can be captured (the reason the person was off work)	Free form text to make appropriate notes of vacancy.	S2.57	
All requests for time off submitted by an employee should be approved by an authorized user (supervisor) before being marked as a vacancy.		S2.58	
A supervisor should be able to accept or reject a request for leave. A field should be present for supervisor to include a reason.		S2.59	
Clicking on a request in the request queue should take the user to the specific day so they can determine staffing levels and approve/deny the request	Would like a warning to be generated if leave request is going to require OT to fill. Would like a warning to be generated if leave request is going to exceed leave bank.	S2.60	
System should automatically track time off requests that have been approved and notify attendance and payroll as required.		S2.61	
Should be able to create ad-hoc schedules for personnel on Return to work assignments		S2.62	
Should be able to restrict Return to work shifts based on criteria provided through the Return to work process.		S2.63	
Should be able to define the appropriate business rules to determine if a vacancy can be left open or must be filled.	Criteria are different for each organization/department. Need to be able to override this if a vacancy occurs in the middle of the night etc.	S2.64	
Vacancies in the schedule should be presented to the user in a clear and concise manner.	Should be colour coded with a number that shows how many short.	S2.65	
User should be able to view the criteria for a specific vacancy		S2.66	
When filling a vacancy, the user should be able to view a recommendation for the replacement staff member based on predefined business rules including skills.		S2.67	

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B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
When recommendations are presented, it should be possible to see any cascade effect of selecting the recommended employee.	By seeing the "knock-on" impact of selecting the recommended employee the scheduler has the ability to view any vacancies created and weigh out the most desirable action and "what if" scenarios.	S2.68	
User should be able to manually accept the desired personnel from the recommendation.		S2.69	
User should be able to override the recommendation and manually select different appropriate resource. Should include:	• Optional confirmation pop-up, configurable by the administrator - confirming the user wants to override the system recommendations, • Audit trail showing the original recommendations, the manual override, user name, time and date. • A visual indication that the vacancy was filled with an override of the recommendation provided.	S2.70	
The system should maintain an audit trail of all rules used to fill vacancies.		S2.71	
Users should be able to run a query to display only the vacancies for specific criteria including capabilities, shift, time/date range or user.		S2.72	
Should be able to identify a fill-in of a position as billable or included in other cost recovery actions		S2.73	
When reassigned from their primary position to cover another vacancy, it should be possible for the scheduler to mark that user as available for instances where they may be required to be moved back to their primary position.	Would like the system to provide feedback to the users for total number of hours in a year (hours owed, time off owed etc.) when adjusting schedules from 4/4 to 5/2 etc.	S2.74	
It should be possible for defined users to revise a schedule after the shift has been completed.		S2.75	
4. Training			
The user should be able to schedule the public education event in advance		E2.1	
The user should be able to identify all WFPS personnel that will be participating in the public education event		E2.2	
The system should allow for the tracking of the Station, Shift (Platoon) and/or Unit that is participating in the public education event **When event is assigned to Fire or EMS Operations.**		E2.3	
The user should be able to identify the type of public education event that will be taking place		E2.4	
There should be a visual indication as to whether or not the personnel are in service or out of service at the time of the event	When assigned to Operations the participating apparatus need to know if they are to be on duty, off duty or conditionally available for the duration of the event.	E2.5	
A designated user should be able to modify the list of public education event types		E2.6	

Template Version:

B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
The system may have a method for identifying whether a public education event is being performed by a Pub Ed officer, Operations staff, or other resources such as HR or summer students		E2.7	
Each public education session should allow the user to track the planned duration and the actual duration		E2.8	
The user should be able to document the organization that requested the public education event along with a contact name and phone number		E2.9	
The system should have a way for a user to query for scheduled events they are scheduled to participate in		E2.10	
It should be possible to schedule training sessions in advance using a shift calendar system		E2.11	
When scheduling a training session, the designated user should be able to identify who the instructor for the session will be	Internal instructors External instructors	E2.12	
When scheduling a training session, the user should be able to identify who the trainees will be		E2.13	
It should be possible to assign a group of users to a training session	Users should be able to collaborate and work together through the session. The session is delivered to a group however the training information is recorded against the individual user.	E2.14	
It should be possible to assign a user to a single training session or multiple training sessions		E2.15	
5. Reporting and Notifications			
It should be possible to run an ad-hoc or scheduled report to display all of the employees in return to work/modified duty status.		R2.1	
Report requirement - # of hours a light or modified duty person is working to ensure they are working appropriate number of hours		R2.2	
Reporting requirement – should be able to provide the list of secondments, where they come from and where they are seconded to		R2.3	
Reporting requirement - should to be able to provide a report of persons that work for someone who has run out of sick time. The report is for the union.		R2.4	
Reporting requirement - should to be able to provide a report of time owed or earned.		R2.5	
Users should be able to display a daily "duty roster" style report.	User should be able to define criteria for report, such as: a) District area b) Halls c) Halls broken down by apparatus including vehicle information d) Specialty Teams e) Scheduled Training	R2.6	

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B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
Duty reports should contain a visual indication of any specialty skill sets for each employee.		R2.7	
Should have the ability to report all work at defined pay codes based on specific criteria	Criteria could include: a) Date Range b) Organizational Unit c) District Area	R2.8	
Should have the ability to report all work at defined pay rates based on specific criteria	Criteria could include: a) Date Range b) Organizational Unit c) Battalion Area	R2.9	
Should have the ability to run report on specific individuals to view their "acting" time.	Should include the option for date range in the query	R2.10	
Daily report to show all personnel who have booked off with the associated payroll code for the book off.		R2.11	
Daily report to show all personnel who have booked on with the associated payroll code for the book back if appropriate.		R2.12	
Should be able to produce a report showing time in a specialty position	This could include time in positions such as Acting Training Officer, Instructor, HAZMAT, Tech Rescue etc.	R2.13	
Should be able to produce a report for each employee or a group of employees showing the history of each position held including time in each position	As part of the staffing alterations, the time in position is utilized to determine if staff reallocations should occur. This report is also used when reviewing employees' career development.	R2.14	
Report to represent all scheduled vacations.	Should be able to narrow the report based on defined criteria such as: a) Time/date b) Hall c) Organization/Department d) Battalion Area	R2.15	
Should be able to produce a report showing overtime for a specific employee or group of employees.	For example, a report showing all the overtime accumulated for employees in the FPO office as this is used to determine how overtime is allocated.	R2.16	
Overtime report should be able to include the daily totals for a specific period of time as well as the overall totals.		R2.17	
Should be able to create a dashboard type report for supervisors and other designated users to show specific benchmarks for the employees they are responsible for	For example, a report that shows: Current Overtime totals Absences Vacations	R2.18	
Each user should be able to create a dashboard type report to show specific benchmarks for themselves.	For example, a report with total: • Current Overtime • Absences • Vacations	R2.19	

B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
Users should have the ability to (at a minimum) collect and report out specific pieces of information which are required by the payroll system.	a) Payroll Code b) Code Description c) Reason sub code d) Authorizing person e) PeopleSoft ID # f) Permanent Hall g) Shift h) Confirmed Rank i) Member Name j) Acting Name k) Location of Work l) Comments/Remarks m) WCB Recurrence Y/N n) Absence Began o) Absence End	R2.20	
Should be able to schedule reports to run automatically on a predefined basis	Daily reports for payroll or management could be scheduled to run at predetermined times.	R2.21	
Reports should be viewed, shared, printed or e-mailed on demand and customizable		R2.22	
Should be able to email scheduled report to defined users or distribution lists.		R2.23	
Easily view trends and monitor employees' time and leave events as well as where labour costs are spent		R2.24	
Should be able to define criteria and indicators to identify attendance trends.		R2.25	
Notifications of attendance trends should be able to be sent electronically to defined users		R2.26	
Create an automated shift report that can be sent to HQ. This report should include anyone on any type of leave including union leave, sick leave, WCB etc.	The report should be automatically regenerated and resent to the email distribution list when a change is made (i.e. half way through a shift)	R2.27	
System should support notifications to the following types of systems: Email Phone Text/SMS		R2.28	
It should be possible to define more than one of each type of notification for each user.		R2.29	
Users should be able to define at least 3 preferred methods of communication (phone, text, email)		R2.30	
Users should be able to phone a central (pre-defined) number and advise of a book off/on situation		R2.31	
Rules should be able to be defined for when a user must report book off/on to a defined person in authority		R2.32	

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B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
When a user's shift is modified the system should automatically contact the user to advise of the modification. Automatic notification should be able to be over-ridden or stopped so the user can be notified manually.		R2.33	
When a user's shift is modified the system should automatically contact the affected halls to advise of the modification. Automatic notification should be able to be over-ridden or stopped so the user can be notified manually.		R2.34	
6. Technical			
The system should operate on a standard industry-recognized operating system		T2.1	
The system should provide a smart phone interface capable of working on iOS, Android Marshmallow (6.0)		T2.2	
The user interface should scale appropriately based on the size, orientation and screen resolution of the user device.		T2.3	
Any Web App or Web Interface should operate in modern browsers including Safari, Firefox, Internet Explorer, Microsoft Edge, Google Chrome		T2.4	
The system should be capable of transmitting alerts and notification via SMS, SMTP, EMTP or commercial paging		T2.5	
The database should be on a standard industry-based database		T2.6	
The vendor should allow for annual upgrades of OS and DB	The vendor should allow for annual upgrades of OS and DB	T2.7	
System vendor should provide application health status alerts to facilitate SNMP monitoring or similar technology.	System vendor should provide application health status alerts to facilitate SNMP monitoring or similar technology.	T2.8	
The system should support importing and exporting in XML	The system should support importing and exporting in XML	T2.9	
The vendor should provide a multiple environment test environment	There should be at least the following database environments required - Production (LIVE), training and development	T2.10	
Interface from the scheduling system to PeopleSoft Interface from PeopleSoft to scheduling system	e.g. for time entry e.g. for personnel data	T2.11	
Should have the ability to interface with Business Intelligence tools		T2.12	
It should be possible to import scheduling and personnel related data into the scheduling system from other databases or spreadsheets (such as Access database or Excel)		T2.13	
The system should support the manual or automated extract of data in formats that are usable for all standard applications including, but not limited to:	• .csv • .html • .xml • .rtf • .doc	T2.14	

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B. Non-Mandatory Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
Users should be able to access staffing system through a web interface.		T2.15	
Users should be able to access staffing system remotely.	Outside the network i.e.: through a firewall	T2.16	
Users should be able to access staffing system through smartphone or similar application.		T2.17	
The system should be capable of supporting multiple agencies within the same server plan/deployment		T2.18	
The system should allow the system administrator to limit user access to view and make changes within their own agency or across agencies if deemed appropriate.		T2.19	
User should be able to change passwords without having to request the change from the System Administrator		T2.20	
If the system becomes unusable, the users should be able to have an alternative version of the schedule with the employees in their primary positions. This would establish a "blank" schedule which could be used as a starting point for manually scheduling during disaster recovery.	The users should be able to use a 'blank' form template to record existing staffing and future staffing.

Alternative versions would include Excel spreadsheet and/or printed versions. | T2.21 | |
7. Corporate			
Vendor solution is currently installed in departments of similar size and number of users	Vendor should be able to provide references	C2.1	
Vendor should offer an extended warranty		C2.2	
The vendor should provide a system database schema		C2.3	
Vendor must offer annual maintenance packages		C2.4	
The vendor should be able to describe the different services and levels of support that are available		C2.5	
The vendor should provide product release notes for the version of the software being recommended for use at the time of system implementation		C2.6	
System documentation should include both user guides and system administrator guides		C2.7	
The vendor should provide technical assistance with the configuration of the system		C2.8	
The vendor should provide technical assistance with the implementation of the system		C2.9	
System solution should be subject to an internal (vendor) QA process		C2.10	
The vendor should provide implementation and project support		C2.11	
Vendor must provide 7/24/365 support	The vendor should provide a web-based knowledge bank;	C2.12	
Vendor should track and monitor customer submitted bugs		C2.13	
Vendor should provide a single point of contact		C2.14	

C. Desired Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
1. General Requirements			
The system may allow for multiple jurisdiction configuration		G3.1	
May be able to associate an agency defined position number to a defined staffing position		G3.2	
May be able to assign a person to a defined position (and position id).	This would be the person's permanent spot (until the next staff alt).	G3.3	
May be able to track the history for each position numbers		G3.4	
May be able to track multiple position numbers for one position		G3.5	
May be able to link file, images, or other attachments to a record	Attachments to be stored on WFPS designated network.	G3.6	
2. Personnel			
Skills/qualifications may be visible when a user is recommended for a position and on all duty reports		P3.1	
Employee may be able to track all their time including Overtime, acting time, stat time, etc. (historical and future)	Employee may be able to run a report and have a dashboard view of this type of information. Acting time relates to promotional qualifications and therefore must be tracked properly. May be available in a calendar view.	P3.2	
The system may allow for tracking of external contacts in relation to the personnel. Contact information should include (but not limited to):	• Name • Relationship • Primary phone number • Secondary phone number • Email • Secondary email • Reg #	P3.3	
3. Scheduling			
May be possible to capture electronic signatures for sign off		S3.1	
Optional positions may be able to be prioritized to represent the order they are to be filled in.	Minimum staffing positions may be marked as mandatory. All positions above minimum may have the option to define the order in which they are to be filled once minimum staffing levels are met.	S3.2	
May allow employees to indicate the days, shifts, or events in which they are available to work extra (O/T)		S3.3	
Supervisors may be able to view an employee's planned schedule versus what they actually worked.		S3.4	
The system may allow for the users to post for public shift trades	A public trade occurs when someone is unable to find another employee to trade with. This feature may allow the user to post the trade for any appropriate resource to accept. Must be based on qualifications.	S3.5	

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C. Desired Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
It may be possible for the employees to request vacation time on an annual basis based on predefined business rules.		S3.6	
May be able to associate an alpha-numeric payroll code to the employee associated to the permanent position who is unable to fill the position		S3.7	
Recommendation may include a minimum of 5 personnel displayed in order of recommendation based on business rules.		S3.8	
4. Education			
If possible, the system may send a notification to a user when they have been scheduled to participate in a public education event		E3.1	
Each training session may have the option to include the expected duration and the actual duration		E3.2	
Notification may be sent to the trainees that a training session has been scheduled		E3.3	
When scheduling a training session, it may be possible book the following:	Training rooms/locations Training equipment Apparatus	E3.4	
A calendar of all training sessions viewable by users with the appropriate security may be desired		E3.5	
When a user is assigned to a training session they may be notified of the training session	Ideally by email with a pre-defined summary of the training session expectations (for example: session objective, minimum evaluation mark expected, evaluation method) This pre-defined summary may be defined when the training session is initially created by the designated user	E3.6	
5. Reporting and Notifications			
Report to represent all officer movements (equivalent to the current Pool Posting). May contain the following information at a minimum:	a) Rank b) Name c) Hall d) Shift e) Moved to: f) Moved From: g) Reason List may be sorted by seniority. Would like to group the "to" moves first and then the "from" moves.	R3.1	
The system may send an alert to the supervisor when an employee reach pre-defined milestones such as #of absences. For performance management		R3.2	
6. Technical			
The vendor may provide the source code, with annual updates	The vendor may be able to provide the source code, with annual updates	T3.1	
Ability to interface with Software Records Management System (RMS). This may be a two way interface	Interface would include personnel data, for example data relative to certifications or skills	T3.2	

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C. Desired Requirements			
Requirement Description	**Requirement Information**	**RFQ Ref#**	**Proponent Response (Y, N)**
May allow for a real-time interface with the CAD system	May send roster information and skills to be used in the CAD	T3.3	
Users may be able to access the system through a telephony system (by phone).		T3.4	
7. Corporate			
Vendor may support/provide a user conference	Vendor may support/provide a user conference	C3.1	
Vendor may support/provide a Canadian user conference	Vendor may support/provide a Canadian user conference	C3.2	
Vendor may support a regional user conference	Vendor may support a regional user conference	C3.3	
The vendor may provide system test plans	1. User Acceptance Test Plan 2. Regression Test Plan	C3.4	
A predefined process and associated expected timelines for trouble resolution may be provided		C3.5	
The vendor may provide user-level training in a train-the-trainer format		C3.6	
Vendor may provide 7/24/365 support	Users may be able to post information/issues to the web-based bank	C3.7	
The vendor may provide a file transfer site;		C3.8	