RFP Title	FACILITIES SERVICES' INTEGRATED WORKPLACE MANAGEMENT SYSTEM (IWMS) PROJECT
RFP Number	FS-2019-04-LB

Number	Report Name	Description
1	Complete Building Report	Complete Building Report
2	Building Cost Report	Report that displays the maintenance, rent, utility, and other costs rolled up at the building level
3	Service Work Orders	Report that displays Service Work Order by status, Service Provider, work type, request type, open date, closed date, etc., fields customizable by role or user
4	Service Work Order Data Export	Report has all of the fields on the Service Work Order
5	Service Work Order Cost Report	Report shows all labor, materials, subcontractor, and other invoicing costs. Need to group by accounting codes
6	Service Work Orders Created within the Last Ten Days	Report that displays Service Work Orders created within the last 10 days
7	Open Service Work Orders Due within the Next 15 Days	Report that displays Service Work Orders due within the next 15 days
8	Work Order Cost Alert	Report that compares as a percentage the actual costs to the maximum authorized amount for a Service Work Order to show if going over/under cost
9	Preventative Maintenance SWO Procedure Steps	Report that provides the ability to print Preventative Maintenance worksheet with procedure steps and all required JCC information for upload
10	Facilities Modifications Project	Report that displays all of the Service Work Orders for each Facilities Modification project
11	Building Assets	Report that displays asset within the building, all fields, all statuses, scheduled planned maintenance dates, and by responsible organization
12	Building System Classification Report	Report that displays the building system classifications and equipment
13	Building Closure/Disposition Report	Report that displays property/building closure/disposition data
14	Service Provider Performance Metrics (KPI) Reports	Dashboard report that displays Service Work Order KPI such as past due, over cost, customer survey results, priority, etc.
15	Quality Assurance Management Reports	Report that displays input by various performance write ups and site visit results by Region, by Service Provider
16	Customer Survey	Report(s) that displays on demand customer survey results for Service Work Orders, including surveys by type, action taken, percentage completed by court, and low survey scores
17	User Reports(Active and Retired)	Report that displays application users by status
18	Invoice Summary Reports	Reports that displays markup, cost codes, fees grouped by service provider and Delegated Court, by priority, by project, by region, and by request type
19	Invoice Summary Report by Cost Codes	Report that displays costs by account codes for invoices for an individual service provider
20	Subcontractor Costs Report	Reports that displays subcontractor costs for a selected date range with the ability to select for specific subcontractors or display for all subcontractors
21	Material Costs	Reports that displays materials costs and mark-up for a selected date range, and can be grouped by cost codes, service provider, region, request type, and priority
22	Labor Costs	Reports that displays labor costs, markup, by funding, by Service Provider, by Region, by request type, by priority for a selected date range
23	Cost Data for Cost Plus Work	Report that displays costs by for Cost Plus Work
24	Real Estate Rent Roll Report	Report that displays payments issued and revenue received in the monthly rent roll (amount, charge codes, payee, vendor ID, remittance address, etc.)
25	Real Estate Rent Roll Preview Report	Report that displays expected payments for the monthly rent roll before payments are issued
26	Rent Roll Variation Report	Report that compares expected rent roll payments to payments on previous month's rent roll
27	Rent Obligations	Report that displays rent obligations for the entire term of the each lease/license
28	Rent Paid	Report that displays rent paid
29	Rent Received	Report that displays rent received
30	Holdover Report	Report that displays select lease data for leases that are in holdover
31	Pending Transfers of Title	Report that tracks properties with upcoming transfers of title
32	Landlord Contact Information	Report that displays landlord contact information for mailing lists
33	Tenant Contact Information	Report that displays tenant contact information for mailing lists
34	Real Estate Documents	Report that displays a list of real estate documents uploaded to application
35	Parking Report	Report that displays parking details such as number of spaces in secured/unsecured lots and type (structure, open lot, subsurface)
36	Report for Rooftop Access	Report that displays data from Service Work Orders for rooftop access such as status, hours, actual costs incurred, and dates
37	Real Estate Rent SCO(State Controller Office)	Report that displays rent roll/cost information and returns it in a format specified by the California State Controller's Office
38	Critical Date Report	Report that displays critical data for leases/licenses and owned properties/owned property contracts
39	Lease Portfolio Report	Report that displays lease building data
40	Rentable Cost per Sq. Ft. Report	Report that displays rentable cost per Sq. ft information
41	New Courthouse Projects	Report that displays new courthouse projects
42	Acquisition Report	Report that displays property acquisition data
43	Building List-JCC is Titleholder	Report that displays the building that is owned by JCC
44	Work Orders with Assigned Assets	Report that displays Service Work Orders for each asset
45	JCC Building Assets	Report that displays the list of all active/retired building assets
46	JCC Building Assets with Permits	Report that displays permit assigned to an asset
47	Fleet Reporting	Report that displays vehicle assignments to JCC personnel and mileage information. A data source may include the fuel card provider system data export
48	EPA Management	Report that displays EPA ID and waste manifest information
49	Refrigerant Leak Management Reporting	Report that assists in controlling refrigerant leakage from HVAC assets by providing information on recovery, recycling, and the destruction of refrigerants at the end of life.
50	Incident Reporting	Report that displays incidents filed by building such as injuries, illnesses, security issues, property damage, etc.
51	Project Management Dashboard	Dashboard reports that displays project status, budget, workload, etc.
52	Insurance Policy	Report that tracks insurance policy issuance and renewal
53	Building Permit	Report that tracks permit request and status
54	Plan Review	Report that tracks plan review request and status
55	Inspection	Report that tracks inspection request and status (re-inspections, passed, failed, etc.)
56	Permit Expiration	Report that displays permit expirations
57	Lift Permits	Report that tracks permits for lift equipment (elevators, wheelchair lifts, escalators and dumbwaiters)
58	Equipment Permits Report	Report that tracks permits for selective equipment (including [not exhaustive] boilers, generators, diesel fuel pumps and compressors)
59	Regulatory Compliance Report (Lift Equip) - Current	Report that tracks Notices to Comply for California Department of Industrial Relations (DIR) lift equipment
60	Regulatory Compliance Report (Lift Equipment) - Past Due	Report that tracks Notices to Comply for California DIR lift equipment that are past the initial due date, nearing the fine date, and past the fine date
61	Preventive Maintenance Worksheet list of Active PMs by tech	Report that displays active preventive maintenance work by technician and scheduled date. The report also includes the steps to perform and the documentation required
62	Preventive Maintenance by Assets Report	Report that shows the preventative maintenance for each asset
63	Preventive Maintenance Work	Report that displays preventative maintenance by active plan, category, equipment classification, regulatory classification, cost, task steps and documentation logs to complete
64	Asset Maintenance History	Report that shows both preventative and demand maintenance performed on an asset
65	Preventive Maintenance Schedule Report	Report that displays planned and active maintenance work for forecasting budget, load leveling, schedule. Ability to search by status, region, and service provider
66	Preventive Maintenance Issue Report	Report that displays preventative maintenance issued for the various maintenance periods including but not limited to monthly, quarterly, semi-annual, and annual. The user needs to be able to select a user defined maintenance period

67	Preventive Maintenance Procedure Steps Report	Report that displays all or a select group of procedure steps for preventative maintenance work by name, category, equipment classification, regulatory classification, or preventative maintenance plan
68	Court Liaison User List	Report that lists all of the Court Liaison users, and can be grouped by county
69	All work for last 7 Days	Report that displays a graph of the service work order counts by request type for the last 7 days
70	All work for last 7 Days by Job Status	Report that displays a graph of service work order counts by job status for last the 7 days
71	Accounting of 810 MOU Costs (Courts)	Report that displays the costs and count of court funded Service Work Orders by the building(s) associated to the logged in user
72	All Requests for Each Building	Reports that displays all of the Service Work Order requests for each building
73	My Requests	Report that displays all active Service Work Orders entered by the logged in user
74	My Requests – Closed	Report that displays all closed Service Work Orders entered by the logged in user
75	My Buildings Report	Report that displays Service Work Orders for the buildings associated to the logged in user
76	SWO Update With Approve & Reject Comments	Report that displays Service Work Order Update requests for all decision actions (for example approved, returned for clarification, rejected). The report needs to include the date of the decision action and decision comments. The report needs to be searchable on the type of Service Work Order change requested (e.g. due date, cost increase, work type change, etc.)
77	SWO Due Date Extension Report	Report that displays Service Work Order due date extension requests
78	SWO Updates Pending Approval	Report displays Service Work Orders with a pending Service Work Order Update request
79	Report Run Frequency Report	Report displays the frequency that reports are used
80	Deferred Maintenance Funding Report	Report that lists Facility Modification Projects that are in deferred status in order to secure funding
81	Utility Use & Cost	Reports that displays utility cost and usage by utility type (e.g. electricity, gas, water, propane, garbage, etc), building, square footage, etc.
82	Utility Year over Year Comparison	Report that displays by list or line graph or chart graph utility data by user building, buildings, or the entire portfolio for a year over year comparison
83	Utility Year Over Year Percentage Change	Report projection per an individual selected utility or all utility types. Option for weather normalization. Building level or portfolio level record selection
84	Monthly Use and Cost by Facility	Report displays utility usage at the facility level on a monthly basis; provides a 12 month comparison with the previous 12 months. Option for 13 month comparison & normalization using external factors such as weather
85	Utility Use & Cost by Type (Energy, Gas, Water)	Report displays usage at building level and includes the utility cost per square foot. Option for weather normalization at facility level prior to roll-up
86	Monthly Use and Cost by Type (Energy, Gas, Water)	Report that displays 12 months comparison with previous 12 months by portfolio level. Also the option to include a 13 months comparison & normalization using external factor such as weather
87	Utilities Reports for SCO (State Controller Office)	Report that displays the utility cost information in a format that is accepted by the California State Controller's Office. Detailed utility billing export that has capability to incorporate various tariff components, cost codes, and also apportionment of costs using pre-determined percentages
88	All Utility Invoices	Report that displays utility data grouped at the building level and the cost codes
89	Utilities Data Report	Reports that displays utility costs and/or usage by type, building, group of buildings, by square footage, etc. Also provide year-over-year, month-over-month, week-over-week, or day-by-day energy
90	Energy & water consumption tracking by building level utility usage and cost	Report that displays energy and water usage and cost by building
91	Energy & water consumption tracking by portfolio level utility usage and cost	Report that displays a portfolio roll-up that can include all or specific utilities. Options to normalize for various factors such a weather, occupancy, and square footage
92	Energy costs tracking	Report that displays real-time (and historic) energy costs using site-specific time of use (TOU) tariffs
93	Energy performance analysis - Cross-sectional benchmarking	This report allow the user to create "peer groups" and will rank buildings [and/or submeters, meters, and equipment] by a performance index such as kBtu per sf, kBtu/sf/yr, $ per year, kBTu per building occupant, $ per year, kW per occupant. Integration capability with the ENERGY STAR Portfolio Manager to automatically produce ENERGY STAR scores for user-selected buildings
94	Energy performance analysis - Longitudinal benchmarking	This report provide the ability to compare the energy usage [and/or costs] in a fixed period (day/week/month/year) for a building against past [and/or predicted] performance of the same period length
95	Energy performance analysis - Heat map visualization	The report provides heat maps of energy consumption, color coding the magnitude of the metered energy usage for a user-selected time period of historic data
96	Energy performance analysis - Baseline energy consumption modeling	Characterization and prediction of the typical or expected energy usage based on key drivers such as weather (degree days/outside air temperature), time of day/week, and other variables. The baseline will be used for energy savings calculations, near-future load predictions, energy use comparisons, and energy anomaly detection
97	Utility billing management - Billing data input	This report provide the capability for JCC staff to upload utility billing data (i.e., electricity, gas, steam, water) using CSV, XLSX format and using a customizable web form.
98	Utility Billing Management - Allocation of utility costs using defined % ratios	The report will display allocation of utility costs and usage using the defined percentage ratios
99	Utility Billing Management - calendar month reporting	The report displays allocations and total utility costs for each calendar month (as opposed to billing periods, which may not fall within a single month)
100	Utility Billing Management - bill component details	The report displays all relevant utility bill component details including total usage, cost, credits/adjustments, demand charges, time of usage breakdown etc.
101	Utility budgeting - reporting	The report displays charting and reporting of energy costs against budget, indicating surplus/deficit
102	Greenhouse gas (GHG) Report	The report displays Greenhouse Gas data and report Scope 1 & 2 GHG emissions associated with facility energy use in accordance with the current GHG Protocol Corporate Standard
103	Energy and water efficiency project management reporting	Report that track the status of energy or water efficiency projects (e.g., start, ongoing, finish), and descriptions of measures and expected savings