4.0 Software Summary

Please describe the proposed software solution(s) providing the following information:

1. Provide an overview of the **required solution(s):** Customer Information System (CIS), Customer Self Service (CSS) and Mobile Workforce Management System (MWM).

**RESPONSE FROM OPEN:**

Marketing

1. This should include the standard and Ad-Hoc Reporting Capabilities of each system.

**RESPONSE FROM OPEN:**

Marketing

1. Provide CIS *utility market* share information related to the proposed primary CIS products.

**RESPONSE FROM OPEN:**

Marketing

1. Provide CSS *utility market* share information related to the proposed primary CSS products.

**RESPONSE FROM OPEN:**

Marketing

1. Provide MWM *utility* market share information related to the proposed primary MWM products.

**RESPONSE FROM OPEN:**

Marketing

1. For each application proposed, Describe the Vendor’s unique business value based on the current software solution and how it relates to future plans.

**RESPONSE FROM OPEN:**

Marketing

4.1 CIS

4.1.1 CIS Solution Look and Feel

Please provide the following required screen shots / examples detailing the interaction between CIS and the related systems (please do not annotate the screen shots). Note: Screen shots must be current.

1. CSR typical views (multiple portal views are required) including but not limited to:

* Page
* Customer CSR Landing with collection activity
* Customer usage history
* Customer payment history
* One customer with multiple service locations
* One customer with multiple services

**RESPONSE FROM OPEN:**

Sales Consultant

1. Account Maintenance screen

**RESPONSE FROM OPEN:**

Sales Consultant

1. Premise/Service Maintenance screen

**RESPONSE FROM OPEN:**

Sales Consultant

1. Cashiering screen

**RESPONSE FROM OPEN:**

Sales Consultant

1. Billing screen

**RESPONSE FROM OPEN:**

Sales Consultant

1. Rate Setup screen

**RESPONSE FROM OPEN:**

Sales Consultant

1. Account Ledger screen

**RESPONSE FROM OPEN:**

Sales Consultant

1. A view of the proposed dashboards/KPI Views

**RESPONSE FROM OPEN:**

Sales Consultant

1. A view of help documentation and search capabilities

**RESPONSE FROM OPEN:**

Sales Consultant

4.1.2 CIS User Interface

1. Describe the client interfaces (e.g., native GUI, browser) available for this application on all device types.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Provide a description of advantages for each type of client interface.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Can the user have multiple screens; sessions open at once, without performance degradation? Is there a maximum number of sessions that can open at one time per user?

**RESPONSE FROM OPEN:**

Sales Consultant

1. What mobile devices does the Vendor support?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe your app(s) for mobile devices.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe your product roadmap for mobile services and new technologies.

**RESPONSE FROM OPEN:**

Sales Consultant

1. If your product is browser based describe how periods of disconnection are handled, is there queuing of data?

**RESPONSE FROM OPEN:**

Sales Consultant

1. If a browser user interface is available, describe the underlying technology utilized and versions supported (AJAX, Java, HTML, XML, etc.).

**RESPONSE FROM OPEN:**

Sales Consultant

1. How quickly does the Vendor support newer versions of browsers? Is there any delay in deploying newer versions or patches on browsers due to system configuration dependencies?

**RESPONSE FROM OPEN:**

Sales Consultant

1. How quickly do you support newer versions of operating systems? Do you continue to support the older operating systems? If yes, how long do you support older operating systems.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe Vendor response times and philosophy in validating and certifying new releases, patches, updates to the System after any browsers on which the System depends. Specify the response times and provide examples from last browser update.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Is there a proper way for users to exit or log off the System? If a user exits improperly, how does the System handle suspended activity?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Can the System self-heal so that application, server, and database resources are reclaimed for optimal System performance?

**RESPONSE FROM OPEN:**

Sales Consultant

4.1.3 CIS Portal Technology

Please provide the following “screen shots” / “examples” for the proposed solution.

1. Please provide the following “screen shots” / “examples” for the proposed solutions

* Security set-up & configuration views
* Systems Performance dashboards
* System Monitoring views
* System Logs
* Technical Control Panels
* Native Querying Tools

**RESPONSE FROM OPEN:**

Sales Consultant

1. If applicable, please describe any portal technology included and/or supported as part of the proposed solution.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe how the proposed portal solution imports data from third-party applications and how it displays that data in a consistent manner.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe how the proposed solution’s portal views can be customized by user roles.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Explain if the proposed solution’s portal can be utilized with other applications that are being proposed and with EMWD’s existing applications. Describe any technical or license fee limitations to this approach. (e.g. an Invoice)

**RESPONSE FROM OPEN:**

Sales Consultant

1. How does the proposed solution keep all the portlets and views of data in synch?

**RESPONSE FROM OPEN:**

Sales Consultant

4.1.4 CIS Application Security

1. Explain how granular permissions can be granted within the application (individual view, table, fields/columns within table, row level etc.).

**RESPONSE FROM OPEN:**

Sales Consultant

1. Is there menu driven security setup functionality that limits users access by menu?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are the permission settings configurable and persistent across System upgrades?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Can application security be integrated with Active Directory User Id’s and security groups?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Indicate which encryption schemes are used for remote user authentication and communication.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Can new security or access profiles be created by copying existing profiles? Are templates provided for generic roles?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Can permissions be granted to a group or role as well as to an individual?

**RESPONSE FROM OPEN:**

Sales Consultant

1. What tools are used and/or provided to help administer application security?

**RESPONSE FROM OPEN:**

Sales Consultant

1. What staff skill level is needed to administer application security? For example, could a billing manager manage their own security by granting staff the appropriate rights based on privileges they themselves have been granted.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe any available security auditing tools or functions. Does the application integrate with operating system or database access auditing capabilities? Can the application detect when unauthorized activity occurs (i.e., employee makes adjustment to personal account, employee makes too many of a certain adjustment type, etc.)?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are graduated levels of audit tracing and history available?

**RESPONSE FROM OPEN:**

Sales Consultant

1. If available, can security or application audit tracing be turned on and off without having to restart the application or database?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are security and/or improper access attempts logged and can notification alerts be sent? If so, how does this affect performance?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe how all passwords and Personally Identifiable Information (PII), including Social Security numbers and Bank Information, are encrypted both at-rest and in-transit. Describe how field-level masking is tied to security levels within the application.

**RESPONSE FROM OPEN:**

Sales Consultant

1. What measures do you use to secure un-encrypted data in your application?

**RESPONSE FROM OPEN:**

Sales Consultant

1. How configurable is the selection of fields to be encrypted in the application and or database?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Does the application provide the ability to make temporary password for password resets?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are self-service password resets possible with your application?

**RESPONSE FROM OPEN:**

Sales Consultant

1. How do you control user rights through external avenues such as SQL and ODBC to prevent users from writing to tables?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Does application support single sign-on (SAML or Kerberos/NTLM)?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are there tools to obfuscate (scramble) PII data in non-production environments? Are they native to the application or third-party?

**RESPONSE FROM OPEN:**

Sales Consultant

4.1.5 CIS Product Research and Development

1. Provide the functional and technical product roadmap and development plan for the proposed software solution(s) as Attachment J to the Proposal.

**RESPONSE FROM OPEN:**

Marketing

1. Provide a summary of future product plans that may be pertinent to the EMWD’s project.

**RESPONSE FROM OPEN:**

Marketing

1. What is the amount/percentage of client funded research and development for the CIS application?

**RESPONSE FROM OPEN:**

Marketing

1. What amount/percentage of licensing and maintenance is dedicated to research and development for the CIS application?

**RESPONSE FROM OPEN:**

Marketing

4.1.6 CIS User Conferences and Groups

1. Does the Vendor sponsor a user conference and/or regional user groups?

**RESPONSE FROM OPEN:**

Marketing

1. What are the primary types of activities at the user conference?

**RESPONSE FROM OPEN:**

Marketing

1. Are there costs in addition to the annual maintenance fees for attendance at the user conference? If so, please define all costs.

**RESPONSE FROM OPEN:**

Marketing

1. How many and what type of utility companies were represented at the Vendor’s last user conference?

**RESPONSE FROM OPEN:**

Marketing

1. Provide a copy of the program from the Vendor’s most recent user conference.

**RESPONSE FROM OPEN:**

Marketing

1. What conference processes or activities guarantee EMWD will have influence and feedback into future product functionality and releases?

**RESPONSE FROM OPEN:**

Marketing

1. Is there an online and/or regional user group community?

**RESPONSE FROM OPEN:**

Marketing

1. If so, please provide the organizations that participate in the California regional group.

**RESPONSE FROM OPEN:**

Marketing

1. Please describe your user advisory board and the typical activities conducted on a monthly, quarterly, and yearly basis.

**RESPONSE FROM OPEN:**

Marketing

1. How many customers participate in your user advisory board and describe their role in their organization?

**RESPONSE FROM OPEN:**

Marketing

4.2 MWM System

4.2.1 MWM Solution Look and Feel

Please provide the following required screen shots / examples detailing the MWM solution (please do not annotate the screen shots). Note: Screen shots must be current.

1. Dispatching Screen

**RESPONSE FROM OPEN:**

Sales Consultant

1. Sample Workflow Screens

**RESPONSE FROM OPEN:**

Sales Consultant

1. A view of the proposed dashboards/KPI Views

**RESPONSE FROM OPEN:**

Sales Consultant

1. Help documentation and search capabilities

**RESPONSE FROM OPEN:**

Sales Consultant

4.2.2 MWM User Interface

In the event that the MWM user Interface mirrors the CIS User interface please indicate as such – it is not necessary to provide the same answers as above.

1. Describe the client interfaces (e.g., native GUI, browser) available for this application on all device types.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Provide a description of advantages for each type of client interface.

**RESPONSE FROM OPEN:**

Sales Consultant

1. What mobile devices does the Vendor support?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe your app(s) for mobile devices.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe how periods of disconnection are handled, is there queuing of data?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe your product roadmap for mobile services and new technologies.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe specific settings required pertaining to cookies, pop-ups, etc.

**RESPONSE FROM OPEN:**

Sales Consultant

1. If a browser user interface is available, describe the underlying technology utilized and versions supported (AJAX, Java, HTML, XML, etc.).

**RESPONSE FROM OPEN:**

Sales Consultant

1. How quickly does the Vendor support newer versions of browsers? Is there any delay in deploying newer versions or patches on browsers due to system configuration dependencies?

**RESPONSE FROM OPEN:**

Sales Consultant

1. How quickly do you support newer versions of operating systems?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe Vendor response times and philosophy in validating and certifying new releases, patches, updates to the System after any browsers on which the System depends. Specify the response times and provide examples from last browser update.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Is there a proper way for users to exit or log off the System? If a user exits improperly, how does the System handle suspended activity?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Can the System self-heal so that application, server, and database resources are reclaimed for optimal System performance?

**RESPONSE FROM OPEN:**

Sales Consultant

4.2.3 MWM Portal Technology

Please provide the following “screen shots” / “examples” for the proposed solutions.

1. Please provide the following “screen shots” / “examples” for the proposed solutions

* Security set-up & configuration views
* Systems Performance dashboards
* System Monitoring views
* System Logs
* Technical Control Panels
* Native Querying Tools

**RESPONSE FROM OPEN:**

Sales Consultant

1. If applicable, please describe any portal technology included and/or supported as part of the proposed solution.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe how the proposed portal solution imports data from third-party applications and how it displays that data in a consistent manner.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe how the proposed solution’s portal views can be customized by user roles.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Explain if the proposed solution’s portal can be utilized with other applications that are being proposed and with EMWD’s existing applications. Describe any technical or license fee limitations to this approach. (e.g. A customer bill presentment)

**RESPONSE FROM OPEN:**

Sales Consultant

1. How does the proposed solution keep all the portlets and views of data in synch?

**RESPONSE FROM OPEN:**

Sales Consultant

4.2.4 MWM Application Security

In the event that the MWM application security mirrors the CIS User interface please indicate as such – it is not necessary to provide the same answers as above.

1. Explain how granular permissions can be granted within the application (individual view, table, fields/columns within table, row level etc.).

**RESPONSE FROM OPEN:**

Sales Consultant

1. Is there menu driven security setup functionality that limits users access by menu?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are the permission settings configurable and persistent across System upgrades?

**RESPONSE FROM OPEN:**

Sales Consultant

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**RESPONSE FROM OPEN:**

Sales Consultant

1. Indicate which encryption schemes are used for remote user authentication and communication.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Can new security or access profiles be created by copying existing profiles? Are templates provided for generic roles?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Can permissions be granted to a group or role as well as to an individual?

**RESPONSE FROM OPEN:**

Sales Consultant

1. What tools are used and/or provided to help administer application security?

**RESPONSE FROM OPEN:**

Sales Consultant

1. What staff skill level is needed to administer application security? For example, could a billing manager manage their own security by granting staff the appropriate rights based on privileges they themselves have been granted.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe any available security auditing tools or functions. Does the application integrate with operating system or database access auditing capabilities? Can the application detect when unauthorized activity occurs (i.e., employee makes adjustment to personal account, employee makes too many of a certain adjustment type, etc.)?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are graduated levels of audit tracing and history available?

**RESPONSE FROM OPEN:**

Sales Consultant

1. If available, can security or application audit tracing be turned on and off without having to restart the application or database?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are security and/or improper access attempts logged and can notification alerts be sent? If so, how does this affect performance?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe how all passwords and Personally Identifiable Information (PII), including Social Security numbers and Bank Information, are encrypted both at-rest and in-transit. Describe how field-level masking is tied to security levels within the application.

**RESPONSE FROM OPEN:**

Sales Consultant

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**RESPONSE FROM OPEN:**

Sales Consultant

1. How configurable is the selection of fields to be encrypted in the application and or database?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Does the application provide the ability to make temporary password for password resets?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are self-service password resets possible with your application?

**RESPONSE FROM OPEN:**

Sales Consultant

1. How do you control user rights through external avenues such as SQL and ODBC to prevent users from writing to tables?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Does application support single sign-on (SAML or Kerberos/NTLM)?

**RESPONSE FROM OPEN:**

Sales Consultant

1. Are there tools to obfuscate (scramble) PII data in non-production environments? Are they native to the application or third-party?

**RESPONSE FROM OPEN:**

Sales Consultant

4.2.5 MWM Product Research and Development

1. Provide the functional and technical product roadmap and development plan for the proposed software solution(s) as Attachment J to the Proposal.

**RESPONSE FROM OPEN:**

Marketing

1. Provide a summary of future product plans that may be pertinent to the EMWD’s project.

**RESPONSE FROM OPEN:**

Marketing

1. What is the amount/percentage of client funded research and development for the MWM application?

**RESPONSE FROM OPEN:**

Marketing

1. What amount/percentage of licensing and maintenance is dedicated to research and development for the MWM application?

**RESPONSE FROM OPEN:**

Marketing

4.3 Customer Self Service (CSS)

4.3.1 CSS Solution Look and Feel

Please provide the following required screen shots (please do not annotate the screen shots). Note: Screen shots must be current.

1. A view of the customer landing page

**RESPONSE FROM OPEN:**

Sales Consultant

1. Usage history

**RESPONSE FROM OPEN:**

Sales Consultant

1. Any other screens Vendor feels highlights the uniqueness of their product

**RESPONSE FROM OPEN:**

Sales Consultant

1. A view of the proposed dashboards/KPI Views

**RESPONSE FROM OPEN:**

Sales Consultant

1. A view of help documentation and search capabilities

**RESPONSE FROM OPEN:**

Sales Consultant

4.3.2 CSS Portal Technology

Please provide the following “screen shots” / “examples” for the proposed solution.

1. Please provide the following “screen shots” / “examples” for the proposed solutions

* Security set-up & configuration views
* Systems Performance dashboards
* System Monitoring views
* System Logs
* Technical Control Panels
* Native Querying Tools

**RESPONSE FROM OPEN:**

Sales Consultant

1. If applicable, please describe any portal technology included and/or supported as part of the proposed solution.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe how the proposed portal solution imports data from third-party applications and how it displays that data in a consistent manner.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Describe how the proposed solution’s portal views can be customized by user roles.

**RESPONSE FROM OPEN:**

Sales Consultant

1. Explain if the proposed solution’s portal can be utilized with other applications that are being proposed and with EMWD’s existing applications. Describe any technical or license fee limitations to this approach. (e.g. an Invoice)

**RESPONSE FROM OPEN:**

Sales Consultant

1. How does the proposed solution keep all the portlets and views of data in synch?

**RESPONSE FROM OPEN:**

Sales Consultant

1. environments? Are they native to the application or third-party?

**RESPONSE FROM OPEN:**

Sales Consultant

4.3.3 CSS Product Research and Development

1. Provide the functional and technical product roadmap and development plan for the proposed software solution(s) as Attachment J to the Proposal.

**RESPONSE FROM OPEN:**

Marketing

1. Provide a summary of future product plans that may be pertinent to the EMWD’s project.

**RESPONSE FROM OPEN:**

Marketing

1. What is the amount/percentage of client funded research and development for the CSS application?

**RESPONSE FROM OPEN:**

Marketing

1. What amount/percentage of licensing and maintenance is dedicated to research and development for the CSS application?

**RESPONSE FROM OPEN:**

Marketing