City of San Leandro

Enterprise Resource Planning (ERP) System Selection Project

Finance Committee Project Update

Agenda

1. Scoring Committee Members

2. Project Approach and Timeline

3. Key Activities

4. Upcoming Project Activities

5. Open Discussion

6. Primary Challenges and Opportunities

Scoring Committee Members
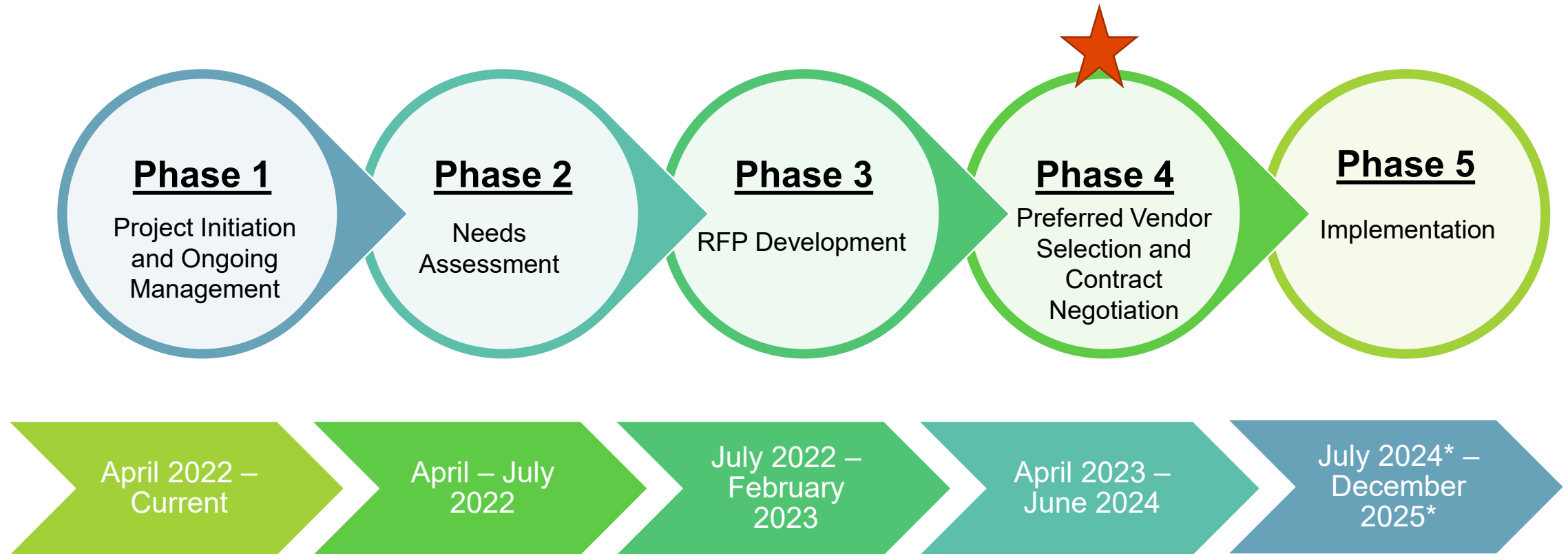
Michael Yuen

Emily Hung
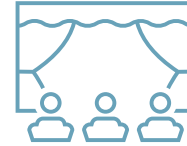
Michael Sinor

Regi John

Project Approach and Timeline

Key Activities

August 2022 – Final Functional and Technical Requirements

November 18, 2022 – February 9, 2023 – RFP posted
- 2 Addenda issued
- Deadline extended
- 6 qualifying proposals received

April 2023 – Round 1 Scoring and Short-List Vendors identified
- 4 vendors short-listed and moved forward for demonstrations

July 2023 – Vendor Demonstrations
- 4 vendors, 2-day demonstrations each

September 2023 – October 2023
- Round 2 Scoring

November 2023 - March 2024 –
- Additional Clarifications and Demo from Finalists
- Reference Checks
- Final round of Scoring with BAFO costs

Upcoming Project Activities

March 2024 – April 2024 – Finalize Vendor Selection

- Conducting Additional Checks on Vendor References
- Completion of Final Vendor Scoring
- Seeking City Approval for Preferred Vendor Based on Best and Final Offer (BAFO) Analysis

April 2024 – June 2024 – Contract Negotiation Phase

- Finalizing agreement details with the selected vendor.
- Initiation of Staff readiness and preparation
- Documentation of Business Processes
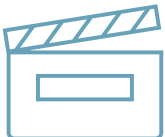
July 2024 – Implementation Planning and Initiation

Open Discussion

Primary Opportunities

	Primary Opportunities
1	The City would like a future system that supports user-friendly and customizable reporting, querying, and dashboard functionality.
2	The City would like a future system to provide integration between all modules of the system as well as with other systems in use.
3	The City would like a future system to provide a project accounting module that tracks expenditures separately, allows employees to enter their time against projects in time entry and fully integrates with payroll functionality.
4	The City would like a future system to provide robust scheduling functionality that includes multi-location, shift bidding, alternate approval, shift trades, call-outs, and tracking officer assignments for reporting.
5	The City would like to have a future system to provide a vendor portal to help automate vendor file maintenance and document storage.
6	The City would like a future system with integrated document management capabilities, including the ability to store supporting documentation in association with a particular transaction for ongoing retrieval.
7	The City would like a future system to provide automated workflow and approval processes that are integrated across all system modules.
8	The City would like a future system to provide intuitive and user-friendly functionality for novice and infrequent users that includes robust training and online help functionality.
9	The City would like a future system to provide enhanced workflow, automation and automatic entry capabilities that increase efficiency of operations and staff time spend on duplicate efforts.
10	The City would like a future system with robust vendor support that can assist and/or resolve issues within acceptable timeframes.

Primary Challenges

	Primary Challenges
1	The reporting capabilities of the existing system are limited and not easily customized for reports and queries.
2	There are few integration points between Tyler Eden and other systems currently in use. There is a heavy reliance on paper and/or web forms for routing, approvals, and information.
3	There is no project accounting module. This requires expenditures to be tracked separately with no ability to charge benefits to the appropriate accounts during the payroll process.
4	The scheduling functionality is not robust enough to be utilized by all departments in the City.
5	There is no AP automation or vendor self-service.
6	The current environment does not have a document repository.
7	Many current workflows are manual processes.
8	The system is not intuitive, especially for novice and infrequent users.
9	Duplication and manual entry is causing business inefficiencies.
10	Current ERP vendor support staff is not meeting the City's expectations.