Electronic Document & Records Management RFP questions

1. Question: What do you see as the biggest challenge in this project?
   i. Answer: Our biggest challenge will be to find a way to combine paper & electronic together without any duplication or missing information. Also, to integrate the EDRMS with the other systems used within the County.

2. Question: Is there a budget that is already set for this and if so what is the amount?
   i. Answer: Yes, we do have an approved budget for 2017 of $150,000 including contingencies. Mountain View County is seeking an option that would meet our needs with the least investment.

3. Question: Do you currently have/use SharePoint within the County?
   i. Answer: We recently integrated Office 365, we do have SharePoint now but haven't used it yet.

4. Question: Is there a file plan with retention policies defined?
   i. Answer: Yes, we have both, a classification system with defined retention schedule.

5. Question: Can you provide more details on the data migration sources and volumes?
   i. Answer: The shared drives contain a mix of word, excel, PowerPoint and PDF documents some or all or these will need to be migrated up to 1,200 GB. We want to manage all the paper records in the system as well. Due to our challenges stated in question 1 our best solution might be Day forward scanning and migrating with the integration of the county's other systems. Users would scan files/documents as requested and classify it in the EDRMS. It is in our expectation that proposals will include recommendations to solve these issues.

6. Question: In the spreadsheet, there is reference to "capture and image processing" but not much detail. Can you provide more detail on the types of scanning, related workflows and other functionality that might be required?
   i. Answer: The County is looking to do front end scanning of mail and other correspondence. Also, when a user signs out a file, the user would scan the file to be able to have the information electronically. The County is looking to integrate workflows such as; invoice approval.

7. Question: How many users would be doing scan and capture?
   i. Answer: We would have a group from 10 to 20 users that would be able to capture, scan and classify information.

8. Question: Is there a preference for an on premise or hosted solution?
   i. Answer: On premise would be our preference.

9. Question: Weather companies from outside Canada can apply for this?
   i. Answer: Everyone can send a proposal.

10. Question: Weather we need to come over for meetings?
    i. Answer: Yes, the company awarded will be expected to attend meetings and be onsite for migration, implementation and training.

11. Question: Can we perform the tasks (related to RFP) outside Canada? (Like, from India or USA)
    i. Answer: Some tasks, for example "support" after the implementation will be acceptable to be perform outside of Canada but for the completion of the project, the County will need onsite resources.

12. Question: Can we submit the proposals via email?
    i. Answer: The proposal must be on a USB key in a sealed envelope marked Confidential as mentioned on the RFP

13. Question: "Support full capture and Management of electronic and physical (paper) records." Is Mountain View County expecting to utilize the five Canon ImageRunner copiers with full scanning and multi-function capabilities to cover their "Land Files" to electronic versions and store them in the proposed EDRMS?
    i. Answer: Currently, part of the Land Files is electronic already (on the share drive and in CityView) and part is only paper. We will migrate the electronic files into the EDRMS system and utilize the Canon ImageRunner copier to scan the rest of the "Land Files" as the users request them. If we were to do a large scanning project, we would not rely on the Canon copiers. We are looking for some suggestions or solutions on how to avoid the confusion, duplication and loss of information.

14. Question: "Allow enterprise searching for physical and electronic records by metadata and/or records." Can Mountain View County clarify this requirement? Does Mountain View County expect the EDRMS to store the current physical reference location of "Land Files". Or is the expectation to be able to search "Land files" after conversion to electronic records? As storing the physical reference location within the EDRMS is not generally a function of EDRMS and is the function of another application or Database.
    i. Answer: Mountain View County is expecting to be able to fully manage physical records including the ability to return results from both electronic and physical files in a single search. We would expect information in our current Master Inventory spreadsheet to be integrated into the EDRMS for search and classification purposes.

15. Question: "Allow flexible integration with major business systems." Can Mountain View County clarify which enterprise applications and versions the vendor is expected to integrate with, to what level of integration? Not all enterprise applications Mountain View County currently utilizes will have this capability that allows for this integration without significant upgrades to the existing Enterprise systems.
    i. Answer: Mountain View County is expecting the vendors to indicate in their proposals which of our systems would be integrated with the EDRMS. If an indicated system cannot be integrated easily, we would factor that into our decision.

16. Question: What is the expected lifecycle of the proposed EDRMS in terms of years?
    i. Answer: Mountain View County is looking for a long-term solution 10+ years

17. How does Mountain View County expect licensing costs to be presented as a yearly basis or for the entire lifecycle of the proposed EDRMS?
    i. Answer: Mountain View is expecting the licensing and maintenance cost on a yearly basis, it must be detailed in the proposal for budget.

18. Question: "The Consultant must be able to provide ongoing software support." Can Mountain View County clarify the support requirements? i.e. Does Mountain View County expect the financial portion of the response to provide and hourly rate for consulting/ support services or a fixed number of required consultant/ support days?
    i. Answer: Mountain View County is expecting to pay a fixed price for the implementation and training. Options for ongoing maintenance and support and details of what is included should be provided in the proposal with associated costs. Also, it would be a value to provide examples of items not included in the maintenance agreement (i.e. are new workflows included in the maintenance or not? etc..).

19. 'Manage inbound correspondence scanning and distribution and workflow." Can Mountain View County clarify this requirement? i.e. Define inbound correspondence scanning. Is this requirement simply asking for a defined workflow to be developed for management scanning activities to ensure consistency in the process?
    i. Answer: The intent is to substantially decrease or eliminate introduction of new paper into our environment by implementing front-end scanning workflow(s) with the ability to distribute items to the appropriate recipient.