



REQUEST FOR PROPOSAL ELECTRONIC DOCUMENT & RECORDS MANAGEMENT SYSTEM

Mountain View County - Didsbury, Alberta

1. Introduction

Mountain View County is seeking to identify a company with the experience and resources to effectively provide the Municipality with an Electronic Document and Records Management System (EDRMS). The purpose of the project is to implement a hybrid life-cycle management of both physical and electronic information and perform an overall assessment of the County's Information Management and Governance Program. The County is looking for a, day forward electronic management while maintaining the legacy of paper records. Mountain View County is currently managing physical records on an Excel spreadsheet, electronic records are managed on share drives recently cleaned up and reorganized according to the County up-to-date retention schedule. The objective is to go paperless moving forward along with preserving background paper records. It is proposed the company will supply, implement, configure, and train all staff in the use of the EDRMS. The Consultant must be able to provide ongoing software support and be able to potentially provide future professional services/ software development.

The key drivers for this initiative are business efficiency, effectiveness and compliance with Freedom of Information and Protection of Privacy Act (FOIPP). The County is looking for more capability to capture, store and collaboratively use documents/records in business processes across the organization. This Request for Proposal provides specifications and requirements for prospective applicants to complete a proposal including cost for completion. Proposals must be submitted no later than **4:00 p.m. on October 6th, 2017.**

2. Background

Mountain View County was established January 1, 1961 as a county operating within the Province of Alberta. Agriculture is the backbone of the County's landscape and culture. With over 1,800 farms and ranches located on 3,800 square kms of rich fertile soil and lush grazing land, agriculture is our proud heritage, and vital link to the future. The population of the County is 12,359 (2011 census). Mountain View County is located between Calgary and Red Deer. The administrative office is located between the towns of Didsbury and Olds and the County currently employs a staff of 135.

3. Technical Details

The IT department at Mountain View County is responsible for all the technology needs of its users, providing centralized management and support to the various departments of the County. Our network environment is almost completely virtualized with VMWare and it includes both Windows and Linux servers. The County currently has both Micro Focus eDirectory and Active Directory for directory services and use Microsoft Exchange through Microsoft Office 365 platform for an email system. The employee's workstations include both desktop and laptops and are running either Windows 7 64-bit or Windows 10 64-bit as the operating system. The County has five Canon ImageRunner copiers with full scanning and multi-function capabilities and one HP plotter/scanner.

- a) The County's business processes utilize a variety of sources to store information; County maintained internal and external databases, file server storage, and paper documents. The following table contains several applications and databases maintained by the County to manage records and information.

No.	Source	Description
1	Serenic	Serenic is the core ERP system used to support finance, field operations, service requests and asset management. The ERP runs on an iSeries server with a DB2 database and a Windows Server with a MS SQL database.
2	CityView	CityView is the application that is used for permitting, planning and by-law enforcement. The system runs on a Windows Server and MS SQL database.
3	Exchange Online	Microsoft Outlook is our current desktop application and we use Office 365 Exchange as our mail server.
4	Office 2016	We currently use the full suite of Microsoft Office 2016 applications
5	AIMS	AIMS is our agricultural infestation management software and is used for weed management in the County. It runs on an MS Access database.
6	Patrol Tickets	The County uses MS Access to maintain historical records of our patrol tickets for our peace officers.
7	Camalot	Camalot is the County's core software for all property assessments. It runs on a Windows Server and has a Firebird database.
8	Canon Multifunction units	All our copiers are Canon ImageRunner copiers with full multifunction capabilities. They are used for scanning of documents which are later stored on shared drives.
9	Shared Drives	Multiple shared drives are used to create and store records and information. Currently holds 1,500 GB of information.
10	ArcGIS	ArcGIS is our Enterprise GIS system from ESRI which runs on a Windows Server and a MS SQL database.
11	Website	Our public facing website is used primarily to provide information to the public and is currently hosted external to the County.

b) In addition to the multiple databases, the County relies on paper information in the current environment. The following table is an overview of the current primary business processes that are managed by at least one paper activity used by the County

No	Source	Description
1	Land Files	Land files are maintained in paper format, sometime stored electronically as well, for each property within the County. Includes; Tax & General (Assessment), Development permits, Subdivision, Redesignation, Location, Building permits, Full permitting, compliance. Currently holds 30,830 Files
2	Bylaws	Bylaws are stored in binders by year in chronological dates.
3	Minutes/Agendas	Minutes and Agenda for council and boards are filed in chronological order by meeting dates.
4	Financial	Accounts Payable and Receivable are stored in Shannon files by year in alphabetical order for invoices.

5	Aerial Photos	Various sizes from large format on cardboard to small format on photo paper stored in boxes.
6	Road/Subdivision plans	Large format both electronic and paper including; road plans, subdivision plans, building plans, blueprints, maps and survey plans.
7	Subject Files	Miscellaneous records includes; administration, contracts, agreement, studies and more.
8	Bridge files	All bridges are associated to a bridge number including; pictures, inspections and repairs.

4. Detailed Scope of Services

The scope of services as outlined in this RFP is preliminary. The final scope of services is conditional on negotiating with the selected company(s) and will be modified as needed, depending on operational efficiencies and conditions. The anticipated scope of the project includes the following:

- a) A core enterprise wide system that will:
 - i. ensure compliance with legislation
 - ii. support full capture and management of electronic and physical (paper) records
 - iii. allow enterprise searching for physical and electronic records by metadata and/or document content
 - iv. ensure effective access and security control over accessing records
 - v. allow flexible integration with major business systems
 - vi. provide unalterable history/audit trail of EDRMS actions
 - vii. allow effective lifecycle management for all records from creation to disposal
 - viii. include a workflow system to allow user defined workflows to be built around document processes
 - ix. manage inbound correspondence scanning and distribution and workflow
- b) Core Functional Requirements: Appendix 1 is a list of core functional requirements for the EDRMS. Respondents should provide relevant information for each category.
- c) Core EDRMS Pricing: Estimates to fulfill core functional requirements should be based on 135 staff using the system. Approximately 100 users would be full time and the rest part time or seasonal. Price should be broken down by:
 - i. software licensing
 - ii. project management
 - iii. data migration
 - iv. consultancy
 - v. training
 - vi. disbursements
- d) Report on issues or situations where a specific business problem is clear but the project solution is not. Provide expert analysis and a fully-documented, fully-justified plan to address these identified business challenges. Include a clear route to change. Provide a transition planning and a migration plan that reflects the County's tolerance for risk and expectations on cost, quality, and delivery timeline.

5. Reporting

- a) The Consultant shall meet with the County's Project Team to regularly discuss the scope of services. The Consultant will provide the following:
 - (i) Conduct meetings as deemed necessary to discuss progress and unique issues that may have surfaced;
 - (ii) Provide a weekly status report against each contact performance measure to the Review Team that will include:
 - Timeline
 - Work completed
 - Project flow
 - Budget

6. Freedom of Information and Protection of Privacy Act (FOIPP)

- a) Compliance with FOIPP:
 - (i) the successful Respondent will be required to enter into an agreement regarding the access to Mountain View County records in compliance with FOIPP if required.

7. Schedule and Resources

- a) The successful Respondent shall complete all work under this request for proposal by **July 2018**.
- b) The Respondent will list in their proposal all the resources necessary, at their cost, to complete the project by the date(s) specified in 7. (a). This listing will include the names and credentials of all personnel.
- c) Mountain View County will provide only the following resources at no cost to the successful Respondent:
 - (i) Working space for the Respondent and associates at the County Office
 - (ii) Mountain View County's Project Coordinator – Records Management Coordinator

8. Submittal Requirements

- a) All interested and qualified Respondents are invited to submit a proposal for consideration. Submission of a proposal indicates that the Respondent has read and understands this entire Request for Proposal (RFP), including all attachments.
- b) Proposals must be submitted in the format described. Proposals are to be prepared in such a way as to provide a straightforward concise description of capabilities to satisfy the requirements of this RFP. Expensive bindings, colored displays, promotional materials are not necessary. Emphasis should be concentrated on conformance to the RFP instructions, responsiveness to the RFP requirements, and on completeness and clarity of content. Proposals must be complete in all aspects. A proposal may not be considered if it is conditional or incomplete. All proposals and materials submitted will become property of Mountain View County.

c) Proposal Presentation

- (i) One (1) electronic version (PDF) on a USB key of the complete proposal must be received by the deadline. The Electronic copy must be in a sealed envelope marked Confidential stating on the outside: Respondent's Name, Address, Telephone Number, Proposal Date, and the text **"Request for Proposal Electronic Document and Records Management System."**

d) Proposal Content

- (i) Submit complete RFP on corporate letterhead, signed by a duly authorized officer, employee, or agent of the organization/firm submitting the proposals that must include the following information:
 - 1. A statement that the proposal is submitted in response to the Request for Proposal for the Electronic Document and Records Management System.
 - 2. A statement indicating which individuals, by name, title, address and phone number, are authorized to enter into a contract, and negotiate the terms thereof, with Mountain View County on behalf of the organization/firm.
 - 3. A statement certifying that the undersigned, under penalty of perjury, is an agent authorized to submit proposals on behalf of the organization/firm.
- (ii) State whether the firm can provide all of the services listed in the Scope of Services. As best as possible describe the approach and experience that the firm will use to carry out the Scope of Services.
- (iii) Statement of Qualification. Include the following in this section of the proposal:
 - 1. General description of your firm, including size and length of time in business.
 - 2. A summary of your firm's background and specific proven experience on similar projects.
 - 3. Location of offices providing services to Mountain View County.
 - 4. List of municipal projects completed that make your firm competitive for the scope of work in this RFP. Show a general description of projects, the organization for which they were undertaken, and dates completed.
 - 5. Types of projects in which your firm has expertise; demonstrating expertise in governance and process efficiency review.
 - 6. Any qualifications not previously described that make your firm unique.
- (iv) Provide résumés of all key personnel who are proposed to be involved in this project, including descriptions of roles, work location, education/certificates, and experience in the area of municipal government.
- (v) Provide not less than three (3) reference contacts from other clients, three (3) of which should be a public agency with whom you now work with or have worked within the last three (3) years and have established a contract on a project of a similar nature. Provide the agency/client name, contact name, address, phone number, project name and dates of service provided.
- (vi) Indicate that you have no outstanding or pending complaints as determined by the Better Business Bureau and are in good standing with any related professional association.
- (vii) Statement of Good Faith. Include the following in this section of the proposal:
 - 1. A statement that the offer made in this proposal is firm and binding for ninety (90) days from the date the proposal is opened and recorded.
 - 2. A statement that all aspects of this proposal, including cost, have been determined independently, without consultation with any other prospective Consultant or competitor for the purpose of restricting the competition.
 - 3. A statement that all declarations in the proposal and attachments are true and that this shall constitute a warranty, the falsity of which shall entitle Mountain View County to pursue any remedy by law.
 - 4. A statement that the Consultant agrees that all aspects of the RFP and the proposal submitted shall be binding if the proposal is selected and a contract awarded.

5. A statement that the Consultant, if selected, will comply with all applicable contract requirements, rules, laws and regulations.
 6. A statement that the Consultant agrees to respond to any reasonable inquiry made by Mountain View County for the purpose of clarifying any of the information contained in a Consultant's proposal. The submission of a proposal constitutes permission by the Consultant for Mountain View County to verify all information contained therein. If Mountain View County deems it necessary, additional information may be requested from the Consultant. Failure to comply with any such request may disqualify a Consultant from further consideration. Such additional information may include evidence of financial ability to perform.
 7. A statement that the Consultant does not have any commitment or potential commitments which may impact the Consultant's assets, lines of credit, guarantor letters or ability to perform the contract.
 8. A statement that the consulting firm presently has no interest and shall not have any interest, direct or in indirect, which would conflict in any manner with the performance of the service contemplated by the agreement with Mountain View County. No person having such interest shall be employed or associated with the Consultant during the term of this agreement.
- (viii) Safety
The Consultant and all associates shall comply with all safety policies and rules of Mountain View County and the safety regulations under the Occupational Health and Safety Act.
- (ix) Statement of Schedule and Costs
The proposal will state a fixed price for the project including all expenses and costs of the Consultant's work under the RFP.
- (x) A fee schedule and setup fee limit for each of the Phases detailed in the Terms of Reference. Estimates must include all disbursements, Software licensing, expenses, sub consultant fees and a table of charge rates for employees. The cost of each phase shall not be exceeded without the prior express written approval of the County.

9. Proposal Submission Deadline

- a) All proposals must be received at the Mountain View County Office at the address below no later than **4:00pm, October 6th,2017**. Postmarks will not be accepted in lieu of actual receipt. Late or incomplete proposals will not be considered. No exceptions will be made.
- b) Questions regarding the content of this RFP must be submitted in writing on or before noon **12:00 (MDT) on September 15th,2017** and directed to the individual(s) listed below. Any clarification or interpretation of the proposal will be made by addendum. Mountain View County is not responsible for any explanation, clarification, interpretation or approval made or given in any manner except by addenda which will be posted on the following website: mountainviewcounty.com/work_for_us/request_for_proposal.html
- c) Mountain View County will be offering an optional site tour at the County Office on September 11th, 2017 at 1PM. The purpose of the site tour is to show the Records Management environment, both physical and electronic records and the relationship between all the County systems. All respondents should contact the Project Coordinator prior to attending the site tour.

- d) All correspondence and the proposal are to be submitted to:

Marie Bouchard, Records Management Coordinator
Mountain View County
1408 – TWP 320
Didsbury, Alberta T0M 0W0

Phone: (403) 335-3311 ext 144
Fax: (403) 335-9207
E-mail: mbouchard@mvcounty.com

- e) Once this RFP has been issued, Respondents are specifically directed not to contact members of Mountain View County Council, employees or consultants for meetings, conferences or technical discussions related to this RFP. All answers to questions and queries made in regards to this RFP will be made by issue of addenda or amendments to all interested parties. Failure to adhere to this policy may result in disqualification of your proposal. All facts and opinions stated within this RFP and all supporting documents and data based upon information available from a variety of sources. No representation or warranty is made with respect thereto.

10. Selection Process and Schedule

- a) All proposals will be subject to a standard review process by Mountain View County. A primary consideration shall be the effectiveness of the Respondent to deliver the services as described in this RFP. Respondents identified as “short listed” may be asked to submit samples of previous work and presenting a demo to the Review Team Evaluation. The short-listed proposals may include quality of requested work samples, results of references, and interviews. The Records Management Coordinator, the Director of Legislative, Community and Agricultural Services and the Information Technology (IT) Manager will make the final decision(s) as which proposal(s) will be considered for approval. Final approval will be made by Mountain View County’s Chief Administrative Officer CAO.
- b) Initial Review. All proposals will be initially evaluated to determine if they meet all of the requirements as stated in this RFP. Failure to meet all of these requirements may result in a proposal being rejected as non-responsive. No proposal shall be rejected, however, if it contains a minor irregularity, defect or variation of the irregularity, defect or variation is considered by Mountain View County to be immaterial or inconsequential. In such cases the Consultant will be notified of the deficiency in the proposal and given the opportunity to correct the irregularity, defect or variation, or Mountain View County may elect to waive the deficiency and accept the proposal.

- c) Technical Review. Proposals meeting the above requirements will be scored based on the following criteria:
- (i) **40 Percent: Ability and Experience of Team to Carry out Project.** Professional and educational experience of key personnel to be assigned to the project, and the firm’s experience with this type of project.
 - (ii) **35 Percent: Approach to and Understanding of the Project.** Proposals will be evaluated based on the Consultant’s understanding and approach to the scope of services desired, and the ability to meet Mountain View County’s objectives. The approach must demonstrate competence and familiarity in completing the projects goals.
 - (iii) **25 Percent: Cost and Fees.** Proposal costs, including time and materials, fee structures and payment schedules are complete and clear. Proposals will be evaluated based on comparisons to other Consultants and to current market costs for comparable services as determined by Mountain View County.
- d) Interview. The most short-listed Respondents may be invited to an interview, which could include a presentation by the Respondent and questions by the County representatives.
- e) Final Selection. Final Selection will be based on determining which proposals will best meet the needs of Mountain View County as described in this RFP. See 10. (a)

11. Contract Award

- (a) Mountain View County may require the potential Respondent(s) selected to participate in negotiations, and to submit price, technical, or other revisions of their proposal as may result from negotiations. Mountain View County reserves the right to make one total award, one award for each subject area, or combination of awards, whichever is in the best interest of Mountain View County. It is Mountain View County’s sole discretion to extend an agreement with the Consultant to include additional services or to ascertain additional services through a separate RFP.
- (b) Proposal Timelines Summary

Release RFP	August 15 th , 2017
Optional Site Tour of MVC Office	September 11 th , 2017
Deadline for Submission of Questions	September 15 th , 2017
Addendum to be Posted	September 22 nd , 2017
Deadline for Proposal Submissions	October 6 st , 2017
Tentative Date for Awarding Contract	November 1 st , 2017
Project Completion Deadline	July 31 st , 2018

- (c) Project Schedule

Developing Workplan	January - February
Configuration, Installation, data migration and testing	March – April - May
Kick off and Training	June - July

12. Other Information

- (a) Acceptance or Rejection of Proposals. This RFP does not commit Mountain View County to award a contract. Mountain View County reserves the right, in its sole discretion, to accept or reject any proposals; to waive minor informalities of proposals; or to cancel, revise or extend solicitation. Proposals shall remain open, valid and subject to acceptance anytime within ninety (90) days after the proposal opening and up to the end of the agreement period. Mountain View County realizes that conditions other than a price are important and will award contract(s) based on the proposal that best meets the needs of Mountain View County.
- (b) Modifications to the RFP. Mountain View County reserves the right to issue addenda or amendments, or change the timelines to this RFP.
- (c) Incurred Costs. This RFP does not commit the County to any costs incurred in the preparation of a proposal in response to this request and Consultant(s) agree that all costs incurred in developing their proposals are the Consultant's responsibility.
- (d) Final Authority. The final authority to award a contract(s) rests solely with Mountain View County.
- (e) Disputes Relating to Proposal Process and Award. In the event a dispute arises concerning the proposal process prior to the award of the contract, the party wishing resolution of the disputes shall request in writing to the Chief Administrative Officer for Mountain View County, within ten (10) days of notification of non-selection. Grounds for an appeal are that Mountain View County failed to follow the selection procedures and adhere to requirements specified in the RFP or any addenda or amendments; there has been a violation of Provincial or Federal Law. Appeals will not be accepted on any other grounds. Mountain View County will consider only those specific issues addressed in the written appeal. The Chief Administrative Officer for Mountain View County or designee shall consider the request and respond in writing within ten (10) days of receipt. The decision of the Chief Administrative Officer for Mountain View County shall be final with respect to matter of fact. All disputes must be submitted to:

Chief Administrative Officer
Tony Martens
Mountain View County
Postal Bag 100 Didsbury, Alberta
TOM OWO

Appendix 1 MVC EDRMS Functional & Technical Requirements

Item #	Description of Requirement	Component included in base system? Yes (Y) No (N) Alternative (A)	Comments
Life Cycle Management			
1.1	Solution is functional without requiring a third-party or external RIM tool.		
1.2	Solution manage information in all formats and shapes i.e. paper, electronic, boxes, pictures etc. Explain how the information is recorded and if the information is recorded automatically or manually		
1.3	Describe how the solution captures metadata (department, created dates ect.)		
1.4	Solution maintain metadata fields already created by document creation programs		
1.5	Solution keep packages of records together and maintain metadata about the package not just the items when permanently exported. i.e. a document is in a file in a box in a box serie		
1.6	Solution record and export all the following activities; - A unique identifier for the event (type and value) - Type of event (creation, ingestion, migration) - Date and time the event occurred - Detailed description of the event - Coded outcome of the event - Agents involved in the event and their roles - Objects involved in the event and their roles		
1.7	Solution provide capability for offline / mobile use to access documents or complete forms while disconnected and synchronized to the record system.		
1.8	Solution provides natively remote online access for users, available on cellphones, of tablets		
1.9	Solution allows users to check documents out of the system for access via localized copy that can be worked on, checked back in, and processed automatically.		
1.10	Solution automatically calculate, assign transfer date and destruction date during data entry based on the retention schedule		

1.11	Ability to classify / apply RM metadata and retention schedule on all formats of records		
1.12	Ability to easily navigate and perform primary job tasks with little-to-no training		
1.13	Describe the options for the user interface; customized configuration, personalized options		
1.14	Solution provide a workflow to help users to properly classify their records		
1.15	Solution allow users to set up a collaborative workspace		
1.16	Ability to automatically link related documents of similar of different file types to eachother		
1.17	Describe the solution's linking capability (i.e contract for a project)		
1.18	The solution provides the ability to easily pre-define document relationships for use in search and retrieval		
1.19	Search capability in every formats content in a single search result list		
1.20	Solution contain an export tool for extensive exporting of content in a non-proprietary format		
1.21	Capability to bulk load camera images and media files directly form a connected device while easily classifyong and managing metadata		
1.22	Ability to move in bulk documents from one folder to another		
1.23	Solution offer a de-duplication function to allow the product to recognize and notify when duplication accure		
1.24	Solution can identify copies of a record and keep track of storage location and other special metadata.		
1.25	Describe how the solution accommodate a variety of business classification; subject based, functional, projects while not duplicating documents		
1.26	Describe the solution's ability to link an electronic signature to a record		
1.27	Solution offers an Optical Character Recognition OCR function		
1.28	Describe how the solution will enable versioning control on documents		
1.29	Ability to auto import camera images and media files directly from a connected device.		

Retention & Destruction			
2.1	The solution classify / apply metadata and retention schedules on physical and electronic records		
2.2	Ability to retain metadata and classification for retention when the information is moved		
2.3	Ability to ceate a workflow with multiple levels of authorization for disposal of records		
2.4	Solution produse a monthly report of physical and electronic records that must be destroyed		
2.5	Ability to print disposition certificates of destroyed records for Records Manager and Directors signature		
2.6	Solution allow a retention rule cut-off to pre-defined event for event based retention rules		
2.7	The Solution monitor and report on file formats tha tare approaching obsolescence		
2.8	Ability to recognized superseded records based on the relationship between one an another i.e. Bylawys, Policies, Reports		
2.9	Solution provide a contract management capability i.e when a contract or insurance has to be renew, notification should be provided		
Litigation Support			
3.1	Define the types of holds and length of time holds can be apply		
3.2	Solution allow to create permissions to identify the persons responsible to put documents on Hold		
3.3	Solution pervent the following actions to held the document as long as the hold is in effect:		
	- Disposition		
	- Retention being applied		
	- Modification of document metadata		
3.4	Solution allows to place holds on classifications, ensuring that the records will be retained even though policy-based retention period has expired		
3.5	Solution allow to apply legal holds on documents, individual records (electronic or physical), category or entire library		
3.6	Define types of holds and length of time holds can be applied to records		

3.7	Solution allows the assignment of multiple holds to records concurrently		
3.8	Solution resume assigned retention and disposition cycle once holds has been removed		
Security and IT			
4.1	Describe which category of users allowed to create permission		
4.2	Describe the solution's ability for designated users to remotely; add users, change password, reset password, apply rights to user groups		
4.3	Explain solution's ability to comply with disabilities regulations such as ADA (American with Disabilities Act) in support of disabled users		
4.4	Solution allow to include the following information in system security audit log:		
	- User ID		
	- User action		
	- Date & Time		
	- Data Deletion		
	- Data Modification		
	- Data Output/Export		
	- User role		
4.5	Describe and list the levels of permission needed for security access		
	4.6	Describe how the solution manags highly sensitive information. E.g. payroll, HR, payment card information.	
	4.7	Describe how the solution assign a unique document ID that does not change regardless if the document move to another folder, library or site	
	4.8	Describe the solution's ability to assign security at each of the following levels:	
- User Groups			
- users			
- Document Type Groups			
- Document Types			
- Folders			
- Notes (Threaded)			
- Workflow			
4.9	Ability to use passthrough or single sign on with Active Directory for authentication		

4.10	Explain the encryption capabilities offered, how they are managed and who is the owner.		
4.11	Ability to encrypt data at storage and/or encrypt data during transit		
4.12	Solution provides full auditing capabilities. Explain		
4.13	Describe if the solution automatically locks account after a set of definable login failure and if the solution has the ability to automatically unlock accounts after a time-out period.		
4.14	Explain the security capability for maintaining confidentiality, integrity and non-repudiation.		
4.15	List server requirements and any potential storage or centralized database server concerns.		
Administration			
5.1	Explain the process and control provided by the solution to check-in & check-out physical records		
5.2	The solution support the passing of checked-out records to another user		
5.3	Solution offer the ability to trigger events when information changes in the business system or the EDRMS		
5.4	Solution allows the configuration to be executed by internal resources (e.g. adding new document type and index values, user administration, configuring workflows, etc.)		
5.5	Provide an overview of the different metadata the solution support (i.e. date, date & time, currency, specific currency, alphanumeric, numeric, etc).		
5.6	Explain the limitation for managing multiple storage location for physical records.		
5.7	Describe the solution's reporting capabilities.		
Electronic Records			
6.1	Solution provides the ability for a document to be dragged and dropped into a folder and automatically inherit the record management policy		
6.2	The solution supports the management of the metadata of electronic records as well as physical records		
6.3	Solution allows to view digital-stored and physically-stored content in a single search		

6.4	Explain the ability to maintain structure of digital record and folders when exportation; how solution retain association between exported object and maintain relationships between objects.		
E-Mail Integration			
7.1	Solution allow drag-and-drop and other method to import messages into EDRMS		
7.2	Explain how the solution can manage the drag-and-drop of e-mails and attachment with classifying it the right way.		
7.3	Solution allow e-mails and attachment to be automatically imported, indexed and classified into the system without any users intervention or data entry (i.e projects)		
7.4	Explain how does the solution manage and display e-mail threads (security & duplication)		
7.5	Explain how the solution can managed e-mails & attachments as records		
7.6	Solution provide the the option to save e-mail with attachment or separate from attachment		
7.7	Solution allow the users to classify folders into e-mail application and apply record criteria		
7.8	Ability to e-mail a document as a copy form the EDRMS as well as a direct link to the original document		
7.9	Solution provides e-mail holds that offer the ability to assign time-based retention to e-mails with the ability to put an e-mail or group of e-mails on holds preventing automatic destruction		
7.10	Lock down managed e-mail messages with integrated legal hold capabilities		
7.11	Solution allows users to export documents, data, and/or links to documents out of the system via e-mail to a file share or a spreadsheet.		
Applications Integration			
8.1	Solution support the integration of the following applications; - CAMALot - Serenic - Cityview - MS Office - GIS		

8.2	Describe any application development tools, programming language, that enables the users to develop and customize their EDRMS applications		
8.3	Explain how the solution launches applications.		
8.4	Solution maintain an audit trail of all content and configuration changes by users		
8.5	Describe how the solution increases efficiencies in backup and database sizing, content by sorting with pointers (File path or link) in the database to file storage locations as opposed to a blob in the database (without duplicating megabytes in more than one area)		
8.6	The solution support the ability to share applications and create common project		
8.7	The Solution provides project management features. Explain if the solution integrates with third-party tools.		
8.8	Explain the approach on the repository used to store and manage documents VS the repository used for collaborative projects		
8.9	The Solution allows the users to create a collaborative workspace.		
Risk Management			
9.1	Explain any known incompatibilities with systems evidenced in previous development. i.e. Incompatibilities with certain installed third-party application, browsers, hardware, integration		
9.2	Identify project risks and challenges and associated strategies to mitigate		
9.3	Describe the solution's ability to maintain full access to data when contract expires, system provider is acquired, or terminates business operation including data export capabilities.		
9.4	Describe the Solution's policies and procedures regarding data custody in the event of a termination of contract		
Capture & Image Processing			
10.1	Describe the solution's capture and image processing capabilities. If the capabilities are included in the core product, offered as a module or provided by a third party.		

10.2	The solution support optical intelligent character recognition. Epxplain if it's supported natively or through a third-party.		
10.3	Describe how the solution would manage workflow engine.		