



City of Pinole
Request for Proposals (RFP)
for
**Records and Agenda
Management System**

**Issue Date:
August 7, 2017**

**Proposal Due Date:
Tuesday, September 5, 2017
by 3:00 p.m. (PST)**

Submit Responses to:

City of Pinole
Attn: Rosa G. Acosta, City Clerk
2131 Pear Street
Pinole CA 94564
racosta@ci.pinole.ca.us

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REQUEST FOR PROPOSALS (RFP) FOR Electronic Records and Agenda Management System

1. RFP OVERVIEW

The City of Pinole City Clerk's Office (the "City") is seeking proposals from firms to provide comprehensive planning, development, data conversion, implementation and support of an Electronic Records/Agenda Management System (ERAMS). In addition, the vendor must offer a robust ERAMS that replaces the City's current SIRE, File Center, SIRE Capture, and Versatile systems. The upgrade and replacement will include software, implementation, data migration, training, maintenance, and support. The City aims to acquire an up-to-date system for managing and preserving the City's records and making them easily accessible to City staff as well as to members of the public. The City desires a single vendor for all services identified in the Request for Proposal (RFP). However, the City will consider alternates such as a prime vendor subcontractor for the conversion process. The selected firm will be responsible for providing services in accordance with the scope of services outlined in the proposal.

At a minimum, the vendor's services shall include the following:

- ❖ Design and configuration
- ❖ Interfaces to City data/systems
- ❖ Implementation consulting
- ❖ Training
- ❖ Content migration/conversion
- ❖ Documentation
- ❖ Project management
- ❖ Reporting
- ❖ Implementation on the City's IT infrastructure and standards
- ❖ Ongoing maintenance and operations support

2. THE CITY OF PINOLE

The City of Pinole was incorporated June 25, 1903. The City is primarily a residential community located in Contra Costa County, twenty-four miles east of San Francisco on Interstate 80. The City's population has remained relatively stable for some years; the population at June 30, 2016 was 18, 946, according to the State Department of Finance. The City has a total annual General Fund budget of approximately \$12 million.

3. CURRENT PRACTICE

The practice of the City of Pinole is to permanently store digital scanned copies of certain types of records, including ordinances, resolutions, budgets, agendas, minutes, election statements, etc., for easy and immediate access by employees and the public.

4. CURRENT SYSTEM

The City of Pinole currently uses SIRE Technologies content/document management solution. SIRE Technologies is currently being used primarily in the City Clerk's Office, Finance, Human Resources and the Development Services Department. There are multiple cabinets and types of records and each has specific requirements for indexing, security, confidentiality, and functionality. The City uses Granicus for agenda and meeting management. The City also utilizes Versatile as a record management repository. This is used city-wide by all departments. The records stored in Versatile are not indexed but will also need to be migrated to the selected ERAMS solution.

All records are stored within the City's storage area network. Staff uploads files by directly accessing the network directory scanning and copying files over. The staff then accesses the City's forward facing web and modifies or adds metadata and hyperlinks to the page that the general public can then use to search and view all records that have been posted. The web page is hard coded with hyperlinks to the files directly from the storage directory.

5. CURRENT COMPUTING ENVIRONMENT

The Information Systems Division (ISD) has oversight of all the City's computer systems, including networking, application servers, and data storage.

The City of Pinole deploys a 95% Microsoft environment. Desktop systems include, but are not limited to, a mix of operating systems that may include Windows 7, 8, and 10 (32bit and 64bit).

6. GENERAL RFP SUBMITTAL INFORMATION

The City's designated staff will evaluate proposals received.

During the review process, the City reserves the right, where it may serve the City's best interest, to request additional information or clarification from those that submit proposals, or allow clarifications, corrections of errors, or omissions. Any and all changes in the RFP will be made by written addendum. The City reserves the right to retain all proposals submitted.

7. RESPONSE COSTS

The preparation of the proposal will be at the total expense of the Proposer. There is no expressed or implied obligation for the City to reimburse responding Proposers for any expense incurred in the preparation of proposals or submitting responses, providing additional information when requested by the City, or for participating in any selection interviews. All proposals submitted to the City shall become properties of the City and will not be returned. If any information in your proposal is confidential and/or proprietary, please further submit a separate, redacted copy for servicing public records request.

8. RFP CONTACT

All questions pertaining to this RFP must be submitted by email (no phone calls please) to the RFP Contact: Rosa G. Acosta, City Clerk racosta@ci.pinole.ca.us

Contact with other City staff is expressly prohibited and may result in disqualification of the Proposer's bid.

9. RFP QUESTIONS

Questions with regard to this RFP should be submitted by e-mail to Rosa G. Acosta, City Clerk, at racosta@ci.pinole.ca.us by Friday, August 18, 2017. All firms sending questions will receive responses to all questions and any other addenda that may be released, via e-mail by Wednesday, August 23, 2017.

10. PROPOSAL SUBMITTAL

The City reserves the right to reject any or all proposals, in whole or part, to waive any informality in any proposal, and to accept the proposal which, in its discretion, is in the best interest of the City. Even though the City intends to only select a single finalist, the City reserves the right to select more than one finalist in the event that City staff is not able to agree on a single vendor. Submittal of a proposal does not guarantee a vendor will be invited to demonstrate nor does it obligate the City to purchase or contract for hardware, software and/or related services either now or in the future.

To be considered, proposers must send one color original, two electronic (searchable PDF copies of entire proposal), include comprehensive answers to the attached Required Questions (Appendix B), answers must be concise and may include tables, charts, etc., but offer enough detail that City staff will understand, and three (3) hard copies of their proposal in a sealed envelope with the name of the company submitting the proposal and the title of "**RFP – Records and Agenda Management System**" to:

City of Pinole
Rosa G. Acosta, City Clerk
2131 Pear Street
Pinole, CA 94564
racosta@ci.pinole.ca.us

For a complete list of the City's RFP submittal detailed listing of system requirements, preferred options, and optional functions, please refer to Appendix A, attached hereto.

Note: Any deviation from this requirement may result in the response being considered non-responsive, thus eliminating the company from further consideration.

Proposals must be received in the office of the City Clerk no later than 3:00 p.m. (PST). **Tuesday, September 5, 2017.** *Late responses will not be considered.*

Email and facsimile responses will not be considered. Vendors shall have sole responsibility for the delivery of responses on time and to the proper location. A response received by the City after the established deadline will be returned, unopened, to the vendor.

11. RFP TIMELINE

Event	Tentative Date
City issues Request for Proposal	August 7, 2017
Deadline for Receiving Questions	August 18, 2017 by 3:00 p.m. (PST)
Responses to Questions	August 25, 2017 by 3:00 p.m. (PST)
Proposals due	September 5, 2017 by 3:00 p.m. (PST)
Review of Proposals	Through September 19, 2017
Finalist selected	September 25, 2017
Finalist provide Proof-of-Capabilities	October 2 through October 11
Presentations/Interviews (if necessary)	Week of October 16, 2017
Selection of Vendor	Week of October 30, 2017
Contract Negotiations	Begins upon notification of selection

It is anticipated that the vendors may be required to make one or more appearances at City meetings to answer questions and present results.

12. SCOPE OF SERVICES

The City is seeking information for an electronic records and management system that will include software, implementation, data migration, training, technical support, and annual maintenance. Hosted systems (Cloud/SaaS) will be considered.

12.1 Electronic Records Management System Requirements

Statement of Need: An electronic records and data management system to manage the creation, storage, and control of documents electronically within the City of Pinole's workflow to include document management, text retrieval, and imaging. The vendor must include data migration from the City's current in-house programs and provide security control, version control, and metadata capture, as well as full-text search capabilities.

12.2 System Requirements

- Windows based network operating system (Windows 7 Professional or higher).
- Management software and databases must be installable and fully-functional on Windows Server 2003 through Windows Server 2016 (2003 is the only version available until the servers are upgraded, and once they are the software will need to work on more recent server versions). This only applies if it requires locally installed media and has a local database(does not apply for SaaS/Cloud systems).
- Maintenance/contract support
- Interface with Office 365, Microsoft Office 2007 (Outlook, Word, Excel, Powerpoint, SharePoint), Granicus Agenda & Record Management, Tyler Technologies – Munis Financial System, Track It, web browser and Desktop Client Interface.
- Maintenance/contract support
- Secured system with multiple layers of user-definable security and ability to establish exceptions for both inputting and searching records.
- Multiple methods to import existing records from various sources, including mass importing.
- Use of metadata to classify records and ability to automatically extract metadata values, as well as automatically tag records.
- Ability to track location of physical records.
- Ability to import audio content files and launch appropriate media viewers for retrieval.
- Ability to capture, store, retrieve, and reproduce irregular sized records.
- Ability to retrieve records by record title, classification, type, address, customer name, number, or any other user-defined index value.
- Provide adherence record and record naming convention or standards.

- Full-text search capability, as well as search abilities of metadata associated with records, and ability to search on exact or partial matches of specified field values.
- Ability to extract content from file types, export search results for importing into an analysis tool, and search specific areas of the library.
- Ability to retrieve records using multiple index words, numbers, dates, etc. simultaneously.
- Ability to display search results by file name, along with examples of where the search words appear, giving the user options before deciding which result to view.
- Efficiently capture information and automate classification, eliminating the need for manual sorting and processing.
- Securely and efficiently search, retrieve, scan, store, e-mail, and manage multiple types of content, including but not limited to electronic and imaged records, audio and video file.
- Ability to “redact” records to black out sensitive information with password protection and ability to manipulate displays by scaling, magnifying, or panning
- Archive records and apply formal retention schedules for effective information governance.
- Include integration with third-party scanning and imaging software to import basic scanned records and support both simple and complex scanning.
- Support advanced scanning features such as image enhancement, OCR, viewing, annotation, printing, and storing images for black-and-white and color pages, and barcode and patch code recognition for automatic record separation when processing large numbers of records.
- Capability to run multiple scanners concurrently with multiple PCs, all networked into a common imaging server and ability to perform batch scanning and indexing.

12.3 Preferred System Functions

- Ability to allow users to look at records without having the native software installed.
- Ability to view multiple pages of a file or multiple files on screen at the same time.
- Ability to customize the system so appearance resembles an organization’s own look and feel.

12.4 Optional Functions

- Electronic signature management.
- Active Directory integration for user access (this way users can login with their usual desktop credentials)
- Automatically updating software
- Record-to-record linking to allow users to bundle files into logical groups and integrated viewing capability to display all linked files.
- Retention policies for converting to a record, archiving, and deletion of record types and done automatically based on a determined date.
- Records accidentally deleted by users (with delete permissions) can be quickly recovered by Library Administrators.
- Ability to check server configuration and health settings.
- Centralized Management Options to allow system administrators to globally manage alert preferences, workflow preferences, FastFind preferences, FDA advanced settings, advanced search settings, and other miscellaneous preferences.
- Server Side Record Importation that allows automatic import of records to the library.
- Record review and approval workflow.
- Workflow features can integrate through Microsoft Outlook email, can be viewed in a calendar, has routing protocols, and can be automated.

12.5 A successful electronic records management system contractor will deliver the following:

- Installation and configuration of system-required hardware and software
- Data migration and assistance with website integration
- Comprehensive system training
- Annual maintenance, service, and all upgrades
- Technical support
- Latest versions of all software and all licensing, titles, manuals, and warranties passed onto the City

13. REVIEW PROCESS

When reviewing the submissions, the City may request additional information about a vendor's software solution. Ultimately, the City will obtain services of a qualified organization to provide the services as outlined. Demonstrations will provide an opportunity for the vendor to show how their system will perform the functions desired by the City.

14. RIGHTS OF THE CITY OF PINOLE

This RFP does not commit the City to enter into a contract, nor does it obligate the City to pay for any costs incurred in preparation and submission of proposals or in an anticipation of a contract. The City reserves the right to:

- ❖ Make the selection based on its sole discretion;
- ❖ Reject any and all proposals;
- ❖ Issue subsequent Requests for Proposals
- ❖ Postpone opening for its own convenience;
- ❖ Remedy technical errors in the Request for Proposal;
- ❖ Approve or disapprove the use of particular sub consultants;
- ❖ Negotiate with any, all or none of the Proposers;
- ❖ Accept other than the lowest offer;
- ❖ Waive informalities and irregularities in the Proposals and/or
- ❖ Enter into an agreement with another Proposer in the event the originally selected Proposer defaults or fails to execute an agreement with the City

An agreement shall not be binding or valid with the City unless and until it is executed by authorized representatives of the City and of the Proposer.

15. PUBLIC RECORDS LAW

Pursuant to California Government Code Section 6250, public records may be inspected and examined by anyone desiring to do so, at a reasonable time, under reasonable conditions, and under supervision by the custodian of the public record. All submitted proposals are considered public records subject to disclosure.

Financial records, including cost proposals, will not be considered *CONFIDENTIAL* and are also subject to public disclosure.

16. SOURCE CODE PROTECTION

The City desires to protect its investment and will require a copy of the source code and technical specification records be held by a mutually agreed-upon software escrow organization. The source code and related records would be released to the City if the vendor is no longer able to support the software.

17. RESPONSE FORMAT

In order to facilitate the analysis of responses to this RFP, proposers are required to prepare their responses in accordance with the instructions outlined in this section. Each vendor is required to submit the responses in a sealed package. Vendors whose responses deviate from these instructions may be considered non-responsive and may be disqualified at the discretion of the City.

Responses should be prepared as simply as possible and provide straightforward, concise description of the vendor’s capabilities to satisfy the requirements of the RFP. Emphasis should be concentrated on accuracy, completeness, and clarity of content. All parts, pages, figures, and tables should be numbered and clearly labeled. All proposals shall address the following items in the order listed below and shall be numbered 1 through 8 in the proposal document.

Section Title

1.1 Chapter 1 – Proposal Summary

This chapter shall discuss the highlights, key features, and distinguishing points of the proposal.

1.2 Chapter 2 – Profile of the Proposing Firm(s)

This chapter shall include a brief description of the primer Proposer’s firm size as well as the proposed local organization structure. Include a discussion of the prime Proposer firm’s financial stability, capacity, and resources. Include all other firms participating in the Proposal, including similar information about the firms.

Additionally, this section shall include a listing of any lawsuit or litigation and result of that action resulting from (a) any public project undertaken by the Proposer or by its subcontractors where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the consultant or its insurers within the last five years.

1.3 Chapter 3 – Qualifications

This chapter shall include a brief description of the proposer’s and sub-proposer’s qualification and previous experience on similar or related projects. Provide the name of any third-party products that are being suggested or discussed in the RFP. For each third-party product, there should be a statement about whether the vendor’s potential contract would encompass the third-party product and/or whether the City would have to enter into a separate contract directly with the third-party vendor for the product and maintenance. Provide descriptions of pertinent project experience with other public municipalities and private sector that includes a summary of the work performed, the total project cost, the percentage of work the firm was responsible for, and the period over which the work was completed.

1.4 Chapter 4 – Work Plan or Proposal

This chapter shall present a well-conceived service plan. Include a full description of major tasks and subtasks. This section of the proposal shall establish that the proposer understands the City's objectives and work requirements and proposer's ability to satisfy those objectives and requirements. Succinctly describe the proposed approach for addressing the required services and the firm's ability to meet the City's schedule, outlining the approach that would be undertaken in providing the requested services.

1.5 Chapter 5 – Response to Questions

The chapter must include comprehensive answers to the attached Required Questions (Appendix B), which may include tables, charts, etc. Answers must be concise, but offer enough detail that City staff will understand.

1.6 Chapter 6 – Project Staffing

This chapter shall discuss how the proposer would propose to staff this project. Key project team members shall be identified by name, title, and specific responsibilities on the project.

1.7 Chapter 7 – Proposal Cost

Include the proposed costs to provide the services desired. The fee information is relevant to a determination of whether the fee is fair and reasonable in light of the services to be provided. Include any other cost and price information, plus a not-to-exceed amount, that would be contained in a potential agreement with the City.

1.8 Chapter 8 – Client References

Proposer should provide a list of at least three (3) California Government installations, including installation and completion dates and client name, title and contact information for each. Submit references for fully-completed installations to the extent possible or note the current status of partially-completed installations.

18. ADDENDA

If revisions become necessary, the City will provide written addenda to all vendors who have registered as vendors for this RFP. All addenda issued by the City must be so noted on any responses that are submitted to the City.

19. EVALUATION OF RESPONSES

Evaluation Method: The City will evaluate all submissions deemed responsive to this request for proposal. The City will review responses and rate them based on the ability of the vendor to meet with City's needs.

20. DEMONSTRATIONS

Selected vendors will be invited to participate in an on-site demonstration of their product. If your firm is invited to demonstrate its solution, be prepared to show how it can be used to improve efficiency in the City of Pinole.

City of Pinole



APPENDIX A

Detailed Listing

System Requirements

Preferred Options

Optional Functions

Appendix A

System Requirements
Management software and databases must be installable and fully-functional on Windows Server 2003 through Windows Server 2016 (2003 is the only version available until the servers are upgraded, and once they are the software will need to work on more recent server versions). This only applies if it requires locally installed media and has a local database(does not apply for SaaS/Cloud systems).
Maintenance/contract support
The electronic content management systems has multiple methods to import existing documents from existing third party applications, desktops, network drives, and file servers. Importation can be done en masse.
The electronic content management system provides both a web browser and a Desktop Client Interface
The electronic content management system allows navigational security, with multiple layers of user definable security to limit access at department, user, system, function and file levels.
Role based security model includes ability to establish exceptions. Additionally, access can be limited to “read only” at the user level.
The electronic content management system is fully integrated with Microsoft Office applications (Word, Excel, PowerPoint, OneNote, Visio) and add email, including attachments (Outlook) to the library.
The electronic content management system allows attaching documents directly to outgoing email using Microsoft Outlook
The electronic content management system has the ability to classify documents with metadata to make them easier to search and retrieve in the future. The number of metatags and document types should be unlimited.
The electronic content management system ensures a mandatory amount of metadata is captured for each document or record in the library. As new documents are added, the user is prompted to classify the file using required metadata fields as defined by the controlled vocabulary, menus, and text fields.
The electronic content management system has the ability to process e-forms and automatically extract metadata values.
The electronic content management system has the ability to track the location of hardcopy paper documents and physical records. Physical documents can be located via search.
The electronic content management system is capable of importing audio content files (MP3, wav,

etc.) and launching appropriate media viewers for retrieval.
Ability to capture, store, retrieve, and reproduce irregular-sized (e.g. larger than 8 ½ x11) documents.
The electronic content management system has the ability to automatically tag documents (add metadata) simply by dragging the documents into a folder. This feature is called “Matter Centric” filing in the legal industry.
Users may retrieve copies of records but not the original records themselves.
The electronic content management system provides adherence document and record naming conventions or standards. As documents are added to the library, they are automatically renamed according to the naming pattern determined by the Library Administrator.
The network operating system under which the electronic content management system runs must be Windows based.
The electronic content management system Desktop Interface client must be fully certified with Windows 7 Professional or higher in a managed environment.
Allows for concurrent and named user licensing.
The system has PDF Forms Metadata Extraction.
The search capability can search the metadata associated with the document as well as the actual content of the document.
The search capability has the ability to extract and search the content from file types, including PDF, Microsoft Office, Zip, and many more.
The search capability can be quickly restricted to a specific area of the library (e.g. Cabinet or Folder).
The electronic content management system can export search results and import them into an analysis tool, such as Excel.
Users can only search for and find (retrieve) documents they are authorized to access.
For textual and numeric fields, the retrieval software should permit index searches based on exact or partial matches of specified field values.
For numeric fields, the retrieval software should permit index searches based on ranges of field values specified by the following relational expressions: greater than, less than, greater than or equal to, and less than or equal to.
Ability to retrieve documents by document title, classification, type, address, customer name, number, or any other user-defined index value.

When doing a search on a significant portion of the database, the electronic content management system will display all file names that the search identified. User can point-and-click on any file(s) displayed to retrieve.
Users should be able to see the various lines and pages where the search word appears, before deciding to view the image.
Accommodates “Full Text Indexing” (i.e., OCR) to search for and retrieve files.
Ability to retrieve documents using multiple index words, numbers, dates, etc., simultaneously.
The system has Quick search templates that allow a single variable in the advanced search template to be empty. When a user runs a quick search, they are required to enter the search term for the empty variable that was setup in the template. The search results that are returned meet the advanced search terms plus the quick search term that the user entered.
The system has Empty saved search templates where the values in the query are left blank.
The electronic content management system can “redact” documents. That is to black out sensitive information in a document and password protect it so that it cannot be seen (an example might be driver license numbers).
Ability to manipulate image displays by scaling, magnifying, or panning.
The system has a web viewer that can display image files (jpg, png, bmp, gif, tiff), Microsoft Word, and PDF documents in the Web Client.
The electronic content management system should have an industry standard and well-documented API that allows integration with third-party applications.
The electronic content management system allows for the expansion of document repositories while remaining seamless to the user.
The electronic content management system has a “portal” in which casual users can access specially designated information in the library without having the need to login.
The electronic content management system can take documents and file them into appropriate folders based on predefined values in customized scripts.
The electronic content management system has simple integration with third party scanning and imaging software to import basic scanned documents.
The electronic content management system supports both simple and complex scanning.
The electronic content management system supports advanced scanning features such as: image enhancement, OCR, viewing, annotation, printing, and storing images for both black-and-white and color pages, and barcode and patch code recognition for automatic document separation when

processing large numbers of documents.
The software is configurable to watch for files created by the scanning process and streamline the indexing and addition of scanned files to the library
Provide compatibility with desktop and production scanners.
The electronic content management system provides the ability to import images and indexes provided by an external vendor and for import into the Document Management System.
The system has the capability to run multiple scanners concurrently with multiple PCs, all networked into a common imaging server.
Capability to do batch scanning and indexing.
The software accommodates Full Text OCR to search for and retrieve files.
The software has the ability to employ OCR technology at scan time to populate index values from a full-page OCR scan.
The system has Server Side OCR that allows documents in tiff or image PDF to be automatically OCR'd.
The system must provide various methods of ensuring that the web portal and documents are accessible, including metadata that is readable by screen readers and other assistive technology, providing text equivalents for graphics (alt tags and long description tags), ensuring that information conveyed with color is also available without color, and using high contrast color choices.
Preferred System Functions
The electronic content management system will allow users to look at documents without having the native software installed. For example, a user may have old "Word Perfect" files that could be looked at using the software viewers.
The ability to view multiple pages of a file or multiple files on screen at the same time.
The electronic content management system can be customized so that appearance resembles that of an organization's own look and feel.
Optional Functions
Active Directory integration for user access (this way users can login with their usual desktop credentials)
Automatically updating software

Electronic signature management – support for inserting signatures and managing records content and access.
The electronic content management system has document-to-document linking to allow users to bundle files into logical groups and integrated viewing capability to display all linked files screen. User can point-and-click on the linked file and the system will take user to that record set.
Retention policies for converting to a record, archiving, and deletion can be set on a document type and done automatically based on a determined ate.
Documents accidentally deleted by users (with delete permissions) can be quickly recovered by Library Administrators.
The electronic content management system has a tool that checks server configuration and health settings to ensure the document repository is running properly and without errors.
The system has Centralized Management Options to allow system administrators to globally manage alert preferences, workflow preferences, FastFind preferences, FDA advanced settings, advanced search settings, and other miscellaneous preferences for all users of the document management system. A system administrator can set the default value for all preferences and then be changed by the end user if desire or the preferences can be set and then “enforced” meaning that the end users cannot modify the option.
The system has Server Side Document Importation that allows the automatic import of documents to the library.
The system is able to perform queries from third party systems to retrieve documents from the electronic content management systems.
The electronic content management system provides a document review and approval workflow for documents needing to pass through several authors, reviewers, and approvers before being ready for general distribution. The review process can be triggered directly from Microsoft Office applications.
The document approval workflow allows documents to be sent to one or many users for sign off. Approvers are able to approve (or reject) the document providing comments and feedback where required. A sign-off top sheet for each document version is maintained so users can see who approved or rejected the document and the feedback they provided.
Individual document versions can be restricted from broader circulation until they have been approved by appropriate parties.
Provides the ability to delegate review and/or approve tasks and signing authority to other users for individual tasks or for all tasks over a given time period.
Users participating in review or approval workflows are provided with a personalized task list for all tasks assigned to the. Users can see at a glance their tasks, a description of the work to be done, who

assigned the task, and when it needs to be completed.

Workflow features integrate through Microsoft Outlook email.

Workflow has routing protocols.

Workflow can be automated for a specific document type and workflow template.

Includes electronic signature capabilities.

The workflow template can be renamed upon initiation if the “Allow Initiator to Define” check box is turned on by an administrator in the template.

The Document Management System integrates with Microsoft SharePoint as a web part to give users the best of all worlds, portals, wikis, collaboration, and structured document management.

City of Pinole



APPENDIX B

Required Questions

Appendix B

REQUIRED QUESTIONS

1. State the product, version, and modules that you are recommending. Clearly indicate which products are from the “prime” respondent and which products are from other vendors.
 - a. If other vendor products are proposed, please indicate if the other vendor products will be integrated with or interfaced to the “prime” vendor product.
 - b. If interfaced, please indicate if the interface currently exists and works, or if it will need to be built as part of this project.
2. Provide company background of the “prime” responder and other vendors involved in the project.
3. Describe the financial condition of your company and if there are any issues or threats that may put it in jeopardy. Is there any outstanding litigation or threat of litigation?
4. Provide an explanation of how the proposed solution meets each of the electronic content management system requirements listed in the SCOPE (see pages 2-3, and further detailed in Appendix A).
5. Provide an explanation of how the proposed solution does NOT meet each of the electronic content management system requirements listed in the SCOPE (see pages 2-3, and further detailed in Appendix A).
6. Describe how access to records, both internally and externally (i.e., members of the public), is accomplished with your product. Are a set number of purchased licenses required for staff? Does your product require public “portals” for those accessing the system externally?
7. Provide an estimated cost (or cost range) for the purchase, implementation, training, data migration, and support of an electronic content management system as detailed in the SCOPE (see pages 2-3, and further detailed in Appendix A), including licensing costs and annual maintenance.
8. Provide a description of the various support levels, maintenance plans, and associated costs.

Appendix B

9. Provide an explanation of how your product addresses our “Preferred” and “Optional” system functions in the SCOPE (see page 3, and further detailed in Appendix A) and the price adjustment associated with those features.
10. Describe your implementation methodology. Is your method flexible enough to incorporate changes during the implementation process?
11. Submit an implementation plan for planning, designing, installing and configuring the core system. Explain how and when end-user feedback is incorporated into your plan.
12. Provide an explanation of how the system manages storage. Are documents compressed and/or archived? What is the compression rate? How much storage/server space is required for a locally-hosted system?
13. Does your company offer a hosted, such as Software as a Service (SaaS) or Cloud, option? If yes, please describe how it would be hosted. Clearly describe the options available and the number of clients currently using this option.
14. Does your company offer features that improve accessibility to people with disabilities, specifically PDF and image files?
15. When was the last time the graphical user interface was updated/refreshed?
16. Please provide the upgrade or release plans for the next three years.
17. Please provide the current hardware/software environment for the product, including operating system, database, etc.
18. Describe the warranty or maintenance program offered with your product(s).