

# 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 of 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)

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