The City of Mercer Island

ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

Contact Information:

The City of Mercer Island
ATTN: Ali Spietz, City Clerk
9611 SE 36th St
Mercer Island, WA 98040
206-275-7793
ali.spietz@mercergov.org

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Introduction

Request for Proposal (RFP)

NOTICE IS HEREBY GIVEN that sealed proposals will be received by The City of Mercer Island located at 9611 SE 36th St Mercer Island, WA 98040 for the following:

> ELECTRONIC DOCUMENT MANAGEMENT SOFTWARE
>
> UNTIL: May 30th, 2008 at 5:00pm PST

Late submittals will not be accepted. The City of Mercer Island is soliciting proposals from qualified firms that are interested in providing and implementing a comprehensive enterprise-wide document management system. Further information is contained in this RFP document. Copies are available from Ali Spietz, City Clerk by calling 206-275-7793. The City of Mercer Island reserves the right to reject any or all proposals and to waive any irregularities.

Dated: May 15th, 2008

Response Instructions

The following instructions are intended to guide you as much as possible in your response to this RFP. Additional instructions and requirements may be found throughout the remainder of this document, so careful attention should be given to insure a complete response on your firm's part. Include any additional information relevant to the requested solution.

Intent to Bid

If your firm intends to respond to this RFP, please forward a written acknowledgement by May26th, 2008 to the following contact:

> Ali Spietz, City Clerk
> 206-275-7739
> ali.spietz@mercergov.org

General Instructions

You should submit one paper original and one digital copy on CD-ROM. Proposals should be sent in a sealed container and clearly labeled with your firm's name and address and "The City of Mercer Island EDMS Proposal. Send proposals to the following address:

> ATTN: City Clerk
> 9611 SE 36th St
> Mercer Island, WA 98040.

Your proposal must include all responses to the requirements contained within this RFP and all appendices (if applicable) must be completed in their entirety.

Proposals must be received no later than May 30th, 2008 at 5:00pm PST. A letter committing your firm to the proposal must be signed by a responsible and authorized officer of your firm and accompany the proposal.

Once submitted, your firm's proposal can be withdrawn at any time before May 30th, 2008 at 5:00pm PST.

Following submission of proposals and final evaluation The City of Mercer Island will have the right to retain the proposals for any unsuccessful bids, maintaining them in confidence.

By submitting a proposal, your firm agrees to all applicable provisions, terms and conditions associated with this RFP.

This RFP, your submitted proposal, all appendices and attachments (if applicable), and stated terms and conditions may become part of the resulting contract.

Proposal Format

Your proposal should be divided by the exact same headings and sub-headings found in the "Submission Requirements" section of this RFP. You should also utilize any response tables as they are presented here.

Vendor Inquiries

Any questions, requests for clarification, or requests for data in connection with this RFP shall be submitted to the following contact no later than May 26th, 2008.

> Ali Spietz, City Clerk
> 206-275-7739
> ali.spietz@mercergov.org

General Considerations

These general considerations provide further instructions for completing your proposal in response to this RFP.

Evaluation and Selection Criteria

Vendors will be evaluated on the basis of the best fit of the vendor proposed solution to the requirements defined. However, The City of Mercer Island may use information other than that provided by the vendor in its evaluation.

Vendors will be evaluated against the following criteria (listed in no particular order):

- Quality and timeliness of submitted proposal and presentation, if applicable
- Ability to meet the functional, technical, and interface requirements with minimal custom development
- Provide deliverables and documentation as stated throughout the RFP and under the "Submission Requirements" section of this RFP

- Financial stability of the organization

- Company experience with municipal EDMS systems

- Product viability

- Experience and qualifications of the company and its resources

- References

- Total cost of licenses and maintenance fees

- License and maintenance agreement terms and conditions

Cost of Proposals

The City of Mercer Island shall not be responsible or liable for any costs incurred by vendor firms in the preparation and submission of their responses to this RFP.

Confidentiality

All information contained in this RFP is considered to be the exclusive property of The City of Mercer Island. Recipients of this RFP are not to disclose any information contained within this RFP unless such information is publicly available. This RFP is provided for the sole purpose of enabling vendors to develop a response.

Rejection of Proposals

The City of Mercer Island reserves the right to reject any or all bids or proposals which are deemed to be non-responsive, late in submission, or unsatisfactory in any way. The City of Mercer Island shall have no obligation to award a contract for product, work, goods, and/or services as a result of this RFP.

Sub-Contractor/Partner Disclosure

Your firm may propose the entire solution. If the proposal by your firm requires the use of sub-contractors, partners, and/or third-party products or services, you must clearly state this in your proposal. The City of Mercer Island requires that the firms submitting proposals shall have primary project and service liability for all products and services which shall collectively meet the RFP requirements. The City of Mercer Island will not refuse a proposal based upon the use of sub-contractors or third-party products; however The City of Mercer Island retains the right to refuse the sub-contractors you have selected.

Your firm shall remain solely responsible for the performance of all work, including work that you sub-contract.

Software Vendor Involvement in Implementation

The software vendor is required to be part of the future project implementation team throughout the life cycle of the project. At a minimum the software vendor shall have representation at the project executive level. Additional required resources will be determined by The City of Mercer Island, the systems integrator and/or the software vendor.

Hardware

The City of Mercer Island reserves the right to acquire standard computer hardware from its current approved provider(s).

Vendor Demonstrations

The vendor may be invited to give a scripted demonstration of the capabilities of the proposed solution to The City of Mercer Island evaluation team. Your demonstration (if requested), along with questions and answers, will be a critical component of the overall vendor evaluation.

Vendor Selection

The City of Mercer Island reserves the right to make an award based solely on the information provided, to conduct discussion, or to request proposal revisions if deemed necessary. The vendor selected for the award will be chosen on the basis of The City of Mercer Island evaluation and determination of which firm will provide the greatest benefit to The City of Mercer Island, not necessarily on the basis of lowest price.

The City of Mercer Island has no obligation to reveal how vendor proposals were assessed. Therefore, proposals should contain your best terms as related to the submission requirements of this RFP.

Contract Negotiation

The City of Mercer Island will review all proposals and select a contractor based on the submittals, or request an interview with selected firms from which a final selection will be made, or reject all proposals should none be deemed acceptable.

The City of Mercer Island reserves the right to accept any proposal that serves its best interest and to reject any and/or all proposals and waive any irregularities. Award of this proposal will result in the two parties entering into a contract.

Proposal Schedule

The following tentative schedule provides key dates for selecting a vendor:

Milestones	Date
RFP Issuance	May 15th, 2008
Vendor Intent to Bid	May 26th, 2008
Vendor Inquiries Due	May 26th, 2008
Proposals Due	May 30th, 2008
Proposal Withdrawals Due	May 30th, 2008
Vendor Selection Announcement	June 15th, 2008

Background Information

About Our Organization

The City of Mercer Island is located in Lake Washington between the Cities of Seattle and Bellevue. The Island has 22,000 residents and is provided a full range of services from the City by roughly 200 City employees.

Current Computing Environment

The City of Mercer Island is open to all electronic document management proposals, but will give strongest consideration to solutions that work within its current computing environment.

Our current computing environment consists of:

- Microsoft SQL Server
- Windows XP/Server 2003
- ESRI GIS Platform

Interfaces and Integrations

The City of Mercer Island uses a number of software applications critical to its core operation and mission. We expect that the proposed electronic document management software solution will need to interface or integrate via a well documented and available API.

Scope of Work

Project Overview

This section provides an overview of the project and some of the expectations of The City of Mercer Island. The information provided is intended to set the tone for scope of work necessary to meet the project's goals. Neither this section nor any part of this RFP is intended to be all inclusive. Therefore, vendors should include in their responses any items they deem relevant and important to the project or The City of Mercer Island.

Description

The City of Mercer Island seeks to acquire and implement a comprehensive enterprise-wide electronic document management system that will accommodate its expanding needs, improve access to information, streamline workflow and management processes, access control, image capture, retention, public access, etc.

It is anticipated that this project will be minimally deployed in its initial phase.

- Initial Phase: Planning Team (Development Services), City Clerk, IGS

The initial phase will include the installation of two fully functional scanning stations, client software for "primary users" which include the planning team within the City's Development Services Group, the City Clerk, and the City's Information and Geographic Services Team for a total of eight (8) users. Six (6) of these users will be primary users and two (2) will be administrative in nature. The expectation is that the City will purchase and implement a solution capable of being deployed to the enterprise in a later phase so any prerequisites to an enterprise deployment need to be included in this initial phase or clearly defined as necessary to an enterprise deployment and available as modular additions without a complete re-deployment.

This RFP represents the best effort by The City of Mercer Island to define its existing and future requirements for a comprehensive electronic document management system. Statements, questions, and information contained within this document should not in any way be construed as binding on The City of Mercer Island, and are subject to final interpretation or modification by The City of Mercer Island as seen fit.

Requirements

This RFP includes a list of submission requirements. Additional items which further explain this project are found in these requirements and should be considered as viable parts of the scope of work.

Locations of Business Entities

The scope of work includes the following departments and/or entities. The name and geographic location of each is listed below.

- City Hall – 9611 SE 36th St Mercer Island, WA 98040
    - IGS Team
    - City Clerk
    - Development Services

Goals

The City of Mercer Island is seeking a software system that can meet the standards outlined in this document. With this in mind, the system shall (in no particular order) accomplish the following primary goals:

- Provide excellent intra-department and user security controls

- Provide segregated security by department and by view to include a secured public view of disclosable documents

- Be capable of operating in an enterprise networking environment

- Provide the ability to create and store images of documents using non-proprietary image formats

- Have no proprietary components

- Have multiple retention schedule capacity

- Provide excellent integration capacity with external systems

The proposed solution shall be of an expandable, modular design to readily incorporate additional enhancements in the future. It should be developed, tested, and maintained using a high-quality software development methodology for long-term reliability and technical efficiency.

Documentation

The City of Mercer Island expects the chosen vendor will provide for each software component a complete set of software documentation for users and administrators. The documentation can be printed, on CD-ROM, or downloaded from the vendor's Website. The City of Mercer Island will be given permission to reproduce the documentation or parts of the documentation as needed. It is expected that the vendor shall maintain its copyrights to all materials.

License Structure

The license structure of the proposed solution should accommodate the departments and users as outlined above. The City of Mercer Island expects the licensing structure to be enterprise-based so that it will also accommodate growth. The City of Mercer Island also expects the licensing structure will include price breaks at reasonable intervals for number of licenses acquired by The City of Mercer Island.

Maintenance

Vendors will be required to maintain the proposed system if implemented. The maintenance offering of chosen vendor should clearly outline how the software is maintained including bug fixes, feature and technology upgrades, and assimilation of state-of-the-art technologies.

Support

The City of Mercer Island anticipates the chosen vendor will have the technical expertise, staffing, and protocols to effectively support the implementation of its product in The City of Mercer Island. Live support should be offered during The City of Mercer Island regular business hours at a minimum. Other desirable support options include FAQs, known issues tracking, email and online-live support, and access to support managers and development staff if required.

Warranty

The City of Mercer Island expects all software to be covered by a reasonable warranty period no less than 90 days. All software and hardware warranties should provide for the operability of the system.

Project Implementation

This section provides a brief description of the expectations, timeline, and training considerations The City of Mercer Island anticipates during project implementation. As before, this section is not intended to be exhaustive and The City of Mercer Island is relying on vendors who submit proposals to incorporate the highest levels of service and expertise during the implementation phase(s) of this project.

Expectations

The goals for this project were outlined above. Here The City of Mercer Island will attempt to describe briefly its expectations while working with vendors during not only the proposal process, but also during implementation.

The following list represents the core expectations of The City of Mercer Island:

- We expect vendors to represent their products and services in an accurate and complete way.

- We expect to provide a fair selection process that evaluates all opportunities presented to The City of Mercer Island and that secures the best possible solution for our organization.

- The City of Mercer Island seeks to work with an organization that fits with our culture and approach to establishing good customer service and productive business relationships.

- By implementing the selected EDMS solution, The City of Mercer Island fully expects to achieve its goals, and as a result of the EDMS implementation be able to enhance the service we provide our customers

- We expect vendors to be motivated towards completion of the project with little to no encouragement by the City and provide support where needed during this project.

Timeline

The City of Mercer Island hopes to complete the initial phase of the implementation by August 30th, 2008. This would include all implementation steps, integration development, system testing, training, and any other steps identified by the chosen vendor.

Training

Training is considered an essential element of this project. One aspect of training The City of Mercer Island will be considering heavily is how quickly and easily the proposed system can be adopted by personnel. How difficult is the system to learn? Is it intuitive for users familiar with Microsoft-based systems? Does the system require heavy ongoing training costs? Does the vendor offer user groups and conferences as means of exposure to current and new technologies? We will be looking for answers to these questions and others within RFP responses, demonstrations, and discussions with vendor representatives.

Sub-Contractors/Partners

List any sub-contractors, partners, and/or third and partners who are involved in fulfillment of proposed solution. Describe the specific role of each.

References

Give contact information for three to five of your customers including the company's name and the contact's name, title, address, phone number, and email address. Also include the products the customers are using.

Project Overview

In this section, please provide information for each sub-section that demonstrates your firm's ability to meet and/or exceed The City of Mercer Island expectations described in the "Introduction," "Background," and "Scope of Work."

Vendor's Proposed Solution

Please give a detailed description of the solution you are proposing. Include software modules and hardware required to operate the system. Tell why your solution best meets the needs of The City of Mercer Island.

Product Descriptions

For each product module you are including in your proposal, provide a detailed description of its purpose, benefits, and key features. Illustrate the dependencies between modules (e.g. if the organization selects modules "C" and "D" it must have module "B"). Additionally, please indicate wherever a module is required or optional.

Documentation

Both system level and user documentation must be provided. List and describe the available documentation that is included in the proposal pricing in this RFP and the media on which it is published.

Maintenance

- Describe the details and duration of any manufacturer's warranty on proposed software system.
- How often do you provide product updates?
- Include your firm's willingness and plan for keeping its products up-to-date. "Up-to-date" is defined as continuously adding or replacing products to take advantage of new technology and complying with emerging industry standards.
- Describe the process by which user input is incorporated into new product releases.
- Does the system require an annual maintenance contract?
- What is included in the annual maintenance contract?

Support

- Vendor shall describe the extent and nature of software support services, including web-based and telephone support, and consulting support.

- Do you have a telephone access number for technical phone support? What are the hours of support?

- What is the guaranteed response time for telephone support?

- Do you have the ability to provide direct remote support (dial-up or Internet)? Please describe.

- Describe your support escalation procedure.

- What is your policy for the provision of on-site support?

- Do you maintain a client accessible Internet Knowledge Base of known issues and frequently asked questions?

License Structure

Please describe your software licensing structure in detail. Do so for each product or module if they differ from one another.

Warranty

Describe what is included with the manufacturer's warranty.

Project Implementation

This section covers various aspects of your firm's approach to implementing projects. Please respond with as much relevant detail to The City of Mercer Island project as possible given the information you've been provided in this RFP and/or at the pre-proposal conference (if applicable).

Project Team

List your project team. Provide names, roles, involvement levels and durations, and relevant experience for each person on the team. Describe the level of The City of Mercer Island staff involvement required during implementation.

Methodology and Approach

- Provide outline and approach for the project.

- Define criteria used for benchmarks in the implementation process.

- Define your criteria to determine when installation is complete.

- Define your procedure for conflict resolution in the event of a disagreement with The City of Mercer Island regarding system performance.

Timeline

Provide a proposed schedule for implementation steps.

Training

- Describe what type of training and the number of people to be trained that is included as part of the initial installation.

- Describe how you will schedule and provide for training of end users, technical staff, and system administrators including initial training, consultation, and follow-up training.

- Describe what types of additional training may be available either through your company or through another agency.

Software Requirements

The following requirements apply to all electronic document management activities regardless of department and/or division. Each requirement is listed with its Merit – or Importance - to the (The City of Mercer Island).

Merit is indicated as follows:
C = Critical
I = Important
D = Desirable

Indicate with an "X" in the appropriate column as to what degree your system will meet the requirement. Below, you will find the legend for the columns:

Fully Meet	System can fully meet with no configuration or customization
Meet w/ Config	System can meet with a configuration (configurable by user, no effect on future upgrades, etc.)
Meet w/ Custom	System can meet with a customization (modification to code, impairs future upgrades, etc.)
Meet w/ 3rd Party	System can meet using a third party
Cannot Meet	System cannot meet the requirement
Other	Alternative solution (please explain in comments section)

The evaluation team will confirm all information. Any proposing firm found to be submitting false information may be subject to immediate disqualification.

Functional Requirements

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
Enterprise Search								
1	C	Provide search capability for documents in the EDMS. All documents containing information with the entered search text in any of the document metadata fields or the searchable text for the document (OCR text, searchable PDF, document text) shall be included in the search results.						
Comments:								
2	D	The search capability shall provide the user with the option to search for an exact match or for partial text (wild card searches)						
Comments:								
3	C	The user shall be able to limit the search to a particular grouping of documents, including, but not limited to, a particular document type or documents in a specified folder						
Comments:								
4	C	Search queries using Boolean operators (e.g. AND, OR and NOT) shall be supported						
Comments:								
5	C	Search queries for phrases shall be supported						
Comments:								
6	C	Search results shall be shown in the order of relevance						
Comments:								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
7	C	Provide access to current information (database search information changes shall be available for search and documents in the EDMS shall be available for retrieval) and shall not require manual intervention for routine loading of data or other system activities.						
Comments:								
8	C	Use thin web client for most end-users						
Comments:								
9	C	When retrieving documents from the EDMS through the Enterprise Search, provide appropriate security access to documents. For example, if a user does not have access to a document in the EDMS, the user shall not be able to access the document through the Enterprise Search System. Also, when obtaining search results from the EDMS through the Enterprise Search, only document information for documents that the user has access to shall be displayed. (i.e. the user shall not be able to view a listing of the document titles or other information for documents that the user cannot access)						
Comments:								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
10	C	Provide search screens for a user to perform a search for project or property agreement records in the Search Information Database that meet a search criteria. The search capability shall be flexible to handle various types of search criteria, such as records with metadata fields that are "equal to", "greater than", "greater than or equal to", "less than", "less than or equal to", or "contain" a search value. Searches using multiple fields shall also be supported.						
Comments:								
11	C	Once search results are displayed, the user shall be able to view a listing of documents in the EDMS for a selected project or property agreement. The user shall have the option to retrieve a listing of all documents or selected documents based upon selected fields such as "document type." This listing shall include information from the document metadata that can be used to identify the document, such as "document type", "description", "date", etc.						
Comments:								
12	C	The user shall then be able to open and view the document in the EDMS by clicking on the document listed.						
Comments:								
13	C	The user has the option of returning to the listed search results to select another document.						

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
Comments:								
14	C	The application or system must support the ability to search and sort on any combination of index fields.						
Comments:								
15	C	Boolean search capability of pre-defined index fields is required.						
Comments:								
16	C	The application or system must be able to search across multiple applications for a common index value.						
Comments:								
17	C	The application or system must be able to display multiple images from one result set.						
Comments:								
18	I	Provide for prevention of "runaway searches" and searches which exceed a configurable time limit. Prevention measures shall include but not be limited to 1) Maximum number of matches per page, 2) Maximum number of pages, 3) Maximum CPU time limit, etc.						
Comments:								
Document Storage And Retrieval								
19	C	Use thin web client for most end-users						
Comments:								
20	C	Provide system management and balancing facilities to ensure data integrity within and across components of the SYSTEM. Regularly scheduled processes shall produce reports demonstrating that no information is being lost.						
Comments:								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
21	C	Document deletion capability shall be restricted to only a small group of users such as the System Administrators or Records Managers.						
Comments:								
22	C	Security shall be assigned by use of groups or roles so that user access can be easily changed when there is a change in personnel or when functional responsibilities are changed						
Comments:								
23	C	Provide necessary backup of data to provide capability to restore data to a point in time during the work day prior to a system failure so that the need for re-entry of data is minimal. This backup shall be provided without adversely affecting system performance.						
Comments:								
24	C	Provide processing capabilities for addition of documents with their metadata, edit of documents and their metadata, and deletion of documents.						
Comments:								
25	C	Provide check-in and check out capability for document revisions.						
Comments:								
26	C	Provide document version history when documents or their metadata are modified						
Comments:								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
27	C	Provide an audit history of changes to a document, including description of information changed, the date of the change and the name of the user who made the change.						
Comments:								
28	C	Allow storage of many different file types, including but not limited to: Images (TIFF, PDF), Microsoft WORD, Microsoft Excel, Microsoft PowerPoint, Lotus Notes mail, AutoCAD, InterGraph MGE.						
Comments:								
29	C	Allow storage of OCR text in addition to a TIFF image file and document metadata within the same document record						
Comments:								
30	C	The search results screen shall allow for display of multiple user entered fields in the document metadata such as Letter Number, Project Number, Project Description, and other fields desired.						
Comments:								
31	C	Provide a standard application programming interface (API) capability to execute a search within a web based Oracle, Lotus Domino or Microsoft Access application to retrieve documents from the EDMS.						
Comments:								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
32	C	The search results screen shall allow for display of multiple user entered fields in the document metadata such as Letter Number, Project Number, Project Description, and other fields desired.						
Comments:								
33	C	Allow for a method of exporting the entire contents of the document repository, including metadata, for migration to an alternate document storage system.						
Comments:								
34	C	The application or system must offer an open, non-proprietary architecture or image file storage, allowing files to be stored in standard file formats. This allows objects to be stored to magnetic media, optical, tape, CD-ROM, and any other device that allows file storage and retrieval.						
Comments:								
35	C	The application or system must utilize network transports to communicate with the database and Mass storage, while not being limited to a particular network operating system. Must work in any Windows supported network.						
Comments								
36	C	System must support the most advanced viewing technologies and allow viewing in native file formats.						
Documents Capture								
Comments:								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
37	C	Ability to scan hardcopy documents and store in a controlled document repository in a single page Tiff Group-IV format. The scanned documents will be managed as individual items, and can be related to other documents and objects stored within the repository and managed as a collection.						
Comments:								
38	C	Manage the capture and storage of existing electronic documents within a central repository to include, but not limited to, the following file formats: Microsoft Office file formats, PDF, HTML, and Tiff.						
Comments:								
39	C	Include flexible scanning interface capabilities, including Kofax, TWAIN and ISIS						
Comments:								
40	C	Scanning can be accommodated for all sizes of input, up to a size 'E' drawing						
Comments:								
41	C	Indexing of the documents can be accomplished manually or automatically from defined locations or from barcode insertions						
Comments:								
42	I	Create and store both machine readable text and graphic images during the scanning process						
Comments:								
43	C	User can apply and append notes and highlights to imaged documents						

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
Comments:								
Document Workflow								
44	C	System should provide fully functional Workflow capability						
Comments:								
45	C	Provide Graphical User Interface for creation of automated work flows (preferably not third party)						
Comments:								
46	C	Provide web access to the workflow						
Comments:								
47	C	Report on and graphically display work flows in progress						
Comments:								
48	C	Include electronic signature capability						
Comments:								
49	C	System should contain an integrated, web-based e-forms product for publishing forms to the intranet/internet						
Comments:								
50	C	Workflow can be initiated from web based e-forms or by document being added to the system						
Comments:								
51	C	Workflow includes email notification of missed milestones						
Comments:								
52	C	Workflow includes Scheduling procedures						
Comments:								
53	C	Workflow includes Routing Rules						
Comments:								
54	C	Workflow includes Deadline Rules						
Comments:								
55	C	Provide web access to the workflow						
Comments:								
Public Access Functionality								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
56	C	Provide out-of-the-box, secure Web access to public documents						
Comments:								
57	C	Support the concatenation of associated documents for display, website and print						
Comments:								
58	C	Use thin web client for most end-users						
Comments:								
59	C	Provide a standard application programming interface (API) capability to execute a search within a web based MS SQL, Oracle, Lotus Domino or Microsoft Access application to retrieve documents from the EDMS.						
Comments:								
60	C	All Web interfaces for management, administrative, and user functions require authentication and SSL cryptography, except for access to information that has been publicly released. Provide description of all web interfaces.						
Comments:								
61	C	Users and administrators must be able to access functionality via a web-based client.						
Comments:								
Report Functionality								
62	C	Reports Based on Metadata						
Comments:								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
63	C	The EDMS must have as an option the ability to store computer generated reports directly into the central repository. This capability is typically referred to as Enterprise Report Management (ERM).						
Comments:								
64	C	Security Audit Reporting must be allowed.						
Comments:								
65	C	Proper system administration management to include the ability to generate detailed user reports and system reports.						
66	C	Ability to support flexible query capability for ad-hoc reporting based on user-defined criteria						
Comments:								
67	C	Ability to produce standard reports (Include list of standard reports with your proposal)						
Comments:								
68	C	Ability to query notes and comments by keyword						
Comments:								
Miscellaneous Functionality								
69	C	Does your system utilize .NET technology and will it be capable of integrating with our current environment?						
Comments:								
70	C	Describe your company's compliance to regulations such as; HIPAA, Sarbanes-Oxley, and/or the Patriot Act.						
Comments:								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
71	C	System must conform to a standard architectural framework for open systems standards						
Comments:								
72	C	Vendors must have experience with larger installations of 1,000+ users						
Comments:								
73	C	A desired feature of the EDMS is the inclusion of zonal OCR capabilities to facility document identification and/or indexing of scanned documents						
Comments:								
74	C	The application or system must have a single interface for document creation, retrieval, display, print, fax, routing, and image enhancement and indexing.						
Comments:								
75	C	The application or system must allow for unlimited number of imaging applications (file cabinets) with the ability to secure any or all applications from user access.						
Comments:								
76	I	The County sees the potential need for the EDMS to have the option to link to existing line-of-business (LOB) applications to allow retrieval of documents stored within the EDMS while a user works within the LOB application. The capability to accomplish application enabling through the use of non-programming techniques such as screen-scraping is desired.						

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
Comments:								
77	C	The system must provide the ability to classify an e-mail with or without attachments						
Comments:								
78	I	The vendor must provide a description and features offered as a part of the EDMS or services the vendor provides to assist in the potential conversion of existing electronic documents						
Comments:								
79	C	Retention schedules applied to stored documents on the EDMS must be able to be centrally administered						
Comments:								
80	C	Need e-mail management capabilities of the EDMS to assist in the retention of those e-mails deemed records						
Comments:								
81	C	A retention management section that allows for assigning time requirements for retention						
Comments:								
82	C	A means of notification for documents that are approaching retention limits by email						
Comments:								
83		The system is able to utilize the (The City of Mercer Island)'s Active Directory for internal user authentication						
84	C	The system must be windows based and ODBC Compliant						
Comments:								

Item	Merit (C, I, N)	Requirement	Fully Meet	Meet w/ Config	Meet w/ Custom	Meet w/ 3rd Party	Cannot Meet	Other
85	C	The system can work with (The City of Mercer Island) current hardware environment						
Comments:								
86	C	Provide source code in escrow						

Hardware Requirements

Answer each of the following hardware requirements. Some answers may only require a "Meets Requirement" response while others may require a more detailed explanation.

Recommended Hardware Configuration

- Describe in detail all hardware required to implement the proposed software system. Support your suggestions.

- Provide diagram of the recommended hardware configuration.

- Describe the level of The City of Mercer Island staff expertise required to support the suggested hardware.

- What is expected useful life of the proposed hardware as it relates to our storage needs?

- If your firm is acting as a hardware reseller, describe the details and duration of any manufacturer's warranties on proposed hardware.

Requirements

- Identify any potential performance impact to the existing LAN/WAN and provide recommendations to minimize any performance impact.

- Does the operating system support a 32-bit architecture?

- Software can run using SQL or Oracle.

- Software allows for distributable services. Please explain.

- List minimum client workstation requirements.

- List minimum scan workstation requirements.

- Client workstations must be able to run word processing or any other organization applications concurrently with imaging and database functions.

Pricing Requirements

Your cost table should include complete cost breakdowns for software, hardware, maintenance, training and implementation, and any additional services required.

Software

List and describe the costs for each component of the proposed software.

Hardware

List and describe the costs for each hardware component of the proposed solution.

Maintenance

List and describe in detail the projected maintenance costs involved in this proposed system.

Training and Implementation

- List and describe the costs to train additional 'basic' or 'advanced' users in the future.

- Describe the costs for documentation materials.

- Describe all costs associated with implementing the solution including, consulting, installation, services, travel, and per diem.

Pricing for Optional Items

List and describe pricing for optional items associated with the system.