Records Management Software Questions and Responses

1. What is a Non-Bid RFP? Bid RFPs are used for scopes that require exactness in bidding. For example a Street Paving RFP is a Bid RFP because all the bids are for the exact same service, and the selection will always be the lowest bidder. A Non-Bid RFP allows the flexibility of receiving proposals for custom features specifically suited for the needs of the project, and the City is not obligated to go with the lowest bid.
2. What is your ERP/HRMIS? Tyler Eden and ADP
3. Is the preference for a Cloud based or On-Premise Solution? On-Premise
4. What departments are involved in the initial quoted project? Executive, Building, Finance, Planning, IT, Public Works, Engineering, Legal, and HR
5. How many City Users will need access to scan/capture/edit documents within the repository initially? Approximately 25
6. How many City Users will only need access to view or participate in the Contract approval process? Approximately 35
7. For Exhibit B, what kind of response, if any, is required? Exhibit B is a Cyber Addendum that will be part of the contract. Park City assumes consent to those terms by all who submit RFPs. Concerns with any part of the contract or exhibits should be submitted to the project manager no later than the RFP submittal deadline.
8. Do you wish to have the Public Access Portal quoted as the initial project? Yes
9. Do you wish to have quoted the build out of your Contract Workflow process? Yes
10. If so, please provide details on this process and any flow charts related to the process: Signature from company/owner – signature from City Attorney - Signature from City Manager – Signature from City Recorder – Executed copies sent to project manager, owner, and City Recorder (to file in the RMS)
11. Do you wish to have quoted GIS and CityWorks integration? Yes
12. Please describe the desired functionality for ArcGIS integration functionality. Record Drawings (As-Builts) may be georeferenced with scale and rotation on a map, and we do not want to lose that capability when storing the documents (images in Tiff, PNG, and JPG format) in a document management system. When retrieved the image files should be able to be placed back on a map with the same extent, scale and rotation that is contained in the file header or world file. Ideally we would also be able to see the extent or bounding box of the drawings without having to load them, but they would be clickable and visible on demand. Our preferred applications are ArcGIS Online and Portal, as well as ArcMap and Pro.
13. Please describe the desired functionality for Cityworks integration functionality. Crews and operators need to be able to access files from within Cityworks, either on the map or as attachments in work order templates, such as for SOP's and equipment manuals. Any integration directly with the Cityworks applications would be better than having to use an additional application and do a separate lookup.
14. What is the scope of work for the initial RMS?

- Ability to scan documents directly into software – include types of scanners required
- OCR documents
- Departmental security rights for multiple users
- Set up retention schedules and alert users before destruction
- Restrict access, manipulation and destruction of documents
- Import meta data from third party program, excel, or csv file
- Import documents directly from other software platforms
- Image adjustment of documents, cropping, redaction, etc.
- Public access portal
- Contract workflow with electronic signature capability
- Integrate GIS platforms (ArcGIS and Cityworks) with geo-reference capability and map display. Also, prefer a single URL to files, regardless of the storage location.
- The software shall be customizable and upgradeable.

15. Are there any other software programs already implemented at the City that need to be integrated with the RMS (other than ArcGIS and Cityworks that were explicitly noted)? Application Extender

16. Are there any specific processes (other than contracts) the City is looking to improve with the implementation of the RMS that should be included in the initial scope of services? i.e. Public Records Request, purchase approvals, travel requests, etc. There is interest for purchase approvals, travel reimbursements and such.

17. Does the City prefer end user training be provided by the vendor or a train-the-trainer model? Please provide quotes for both options. Will the City prefer onsite training? No preference, but you can include it the quote as an option.

18. What is the budget approved for the records management system for FY 2019-2020? $75,000-$100,000

19. Our firm has a scanning service bureau. Is the City interested in information about pricing for outsourced scanning of backfile documents? Not with this RFP

20. How many External users does Park City expect to utilize the public access portal? This would vary, but on a regular basis 50-100 staff and public would be directed to use the portal instead of filing GRAMA requests.

21. What is the volume (number and total size) of images and indexes to migrate? It would be ideal to see volume by document type. I don't have that information at the moment.

22. How many different document types (for meta data) exist in the current system? I don't have that information at the moment.

23. Can the existing meta data be exported to a flat file? I don't have that information at the moment.

24. How is the meta data currently stored (associated) with content in the document management system? I don't have that information at the moment.

25. Does Park City have a published Records Management Plan? No

26. How many records retention schedules currently exist for Park City? Park City follows the State retention schedule.

27. How many users would have their own scanner tied directly into the system? Approximately 25

28. When you ask for "Public access portal" are you referring to allowing citizens to log into the Laserfiche repository anonymously as Read-Only, temporary users who would have access to a limited number of folders containing only public records? Yes The other popular portal is the Laserfiche Forms Portal that Vineyard and Heber City have. It would allow internal staff and constituents to participate in Business Processes using the Forms Professional module for approvals, indexing, archiving, etc. Yes to this too.

29. How would you like the "electronic copy in Word" delivered? As an attachment to an e-mail.

30. Is Park City Municipal Corporation tax exempt for Software products, Hardware purchases and Professional Services? Yes

31. What Scanners brands and model numbers are you currently using at the City? We only have scanners that are part of large copiers (Sharp MX 6070N)

32. Please indicate if your requirements for electronic signatures pertain to internal staff only (part of your active directory), or are you also looking for authenticated e-signature capability for outside users? Both internal and external users. If outside entities will need to participate in digital signatures, what e-signature platform do you currently prescribe to, i.e. DocuSign? The City is not currently set up for e-signatures. Additionally, do you need to provide a signature pad for any internal or kiosk type signature capabilities? No

33. GIS: Please provide your current GIS/ESRI version information? 10.6

34. Is there a requirement to provide Public Access via MAPs?

35. Retention: Alert only or approval required for Retention/destruction? Alert. Do you work with Iron Mountain or other source? No.

36. OCR on demand: Please explain which of the following functions are desired?

37. Conversion of imported document to searchable PDF. Yes. Zonal OCR Capability. No. Full Text Indexing document contents. Desired.

38. Contracts Management: How many contract templates do you have? 5

39. How many contract reviewers or approvers do you have currently? 3-5

40. Please indicate if a vendor has been consulted for this project within the past 12 months. No

41. Due to the late timeframe associated with question submission and the upcoming Thanksgiving holiday immediately before the proposal due date, would you consider providing a 1 week extension to the current due date, i.e. change from 12/4/2019 to 12/11/2019? No