



# **RFP 2016-01 Electronic Document and Records Management System Questions and Answers May 19, 2016**

Below are answers to questions submitted regarding RFP 2016-01 Electronic Document and Records Management System (EDRMS). There were a few questions that needed clarification (highlighted in yellow) prior to answering. The clarification was received and answer given.

A – means answer to question

C – means clarification of the original question was requested.

Exhibit A I:

- Does the Town plan on scanning all of the described records in one project, or as a multi-budget project?  
A – Depends on the cost.

Exhibit A II. F. Email Archive:

- Would the Town be interested in having referenced emails stored in the same web-hosted repository as described in II. E. ?  
A – Yes.
- Is the town open to a proposed solution in which they host and maintain the email archive?  
A – Yes.

Exhibit A II. F.

- Is the town requesting quotes for locally installed document/record management systems? Requested clarification  
C- Does the Town wish to purchase document management software to be installed at the Town for ongoing scanning and storage? The previous section is very specific about a vendor scanning and hosting your documentation, then this section seems to imply that the Town would also like to have their own Document Management system. These requirements listed all describe the use of a Document Management system.  
A - Yes.
  - Would this be in addition to, or in place of the previously referenced hosted web and email repositories?  
A – In addition to.
  - If the Town wishes to have a document management system installed locally, how many Town users would need access to the described system?  
A – All staff would need general access and only four (4) to restricted access areas.
  - How many departments would be involved in the project?  
A – Administration, Finance, Human Resources, Police Department and Public Works.
  - How many users would need to scan to the system?  
A – Approximately six (6)
  - Does the town have dedicated IT resources available for the project?  
A – Yes.
  - Can you identify the Town’s software in which integration is being requested?  
A – Microsoft Word, Adobe, Xcel, Powerpoint, AccuFund, and Corel WordPerfect
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- 1) How many record types will we need to scan? Requested clarification

C- Exhibit A Section I indicates:  
Town Council Agendas  
Minutes  
Ordinances  
Resolutions  
Agreements  
Finance Documentation

Each one of these is a record type and probably has its' own indexes.

A – All of the above as well as Human Resource records and any others that maybe needed.

2) How much paper per type?

A – As stated in RFP approximately 200 cubic feet.

3) Are there documents within the folders?

A – Yes.

4) How many pages on average for each document within the folders?

A – Unknown.

5) What are the index fields for each of the record types? Requested clarification

C - The need for compliant RIM best practices is demonstrated daily in all organizations, public and private. Escalating fines and sanctions for poor corporate recordkeeping are evidence that compliant RIM is no longer optional. A program must contain a proactive approach for management of all of the seven Best Practice areas — Accountability, Retention, Policy and Procedures, Imaging, Access and Indexing, Disposal and Compliance. These areas need to be managed consistently and effectively.

Access and Indexing - Proper indexing is essential to enabling the usability of information and ensuring that you can access what's needed to support business goals, litigation responses and audits or investigations.

File indexing makes finding and retrieving your information quick and easy. All too often files are carelessly placed in boxes and filing cabinets without being indexed or classified. Retrieving misfiled or lost business documents is a time consuming process. Further complications are the regulatory and legal fines associated with disorganized or improperly indexed business files that can be expose your organization to risk.

Using your indexing method or ours - when we index your files, our staff sorts, organizes, and records with appropriate identifiers for each file. The file identifiers are tied to the specific box. You end up with a complete and detailed index of your business files and documents.

So when somebody needs a file a search is reduced to a few keystrokes. Indexing means not having dig through dozens of boxes or reams of data as you hunt for a specific file or document. Indexing identifiers may include:

File type  
Department  
Year / date  
Retention period

Destruction date

Customer name/number

Patient name/number

Other key information

A - Which ever the company feels will best fit our needs.

6) How do you store e-mails today?

A – Server/Cloud

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1. How many Document Scanning Stations does the Township of Windermere require with the EDRMS for adding new documents after the initial back log conversion of the 175 boxes?

A – one scanning station.

2. Does the Township already have Document Scanners, if so what make and model (s)?

A – Konica Minolta bizhub C454e.

3. How many new documents/pages does the Township anticipate adding to the EDRMS per month after the initial conversion of the 175 boxes?

A – Unknown.

4. How many departments within the Township will require their own application initially? I.E., Town Clerks Office, Town Manager, Police Department, Finance, etc.?

A – Town Clerk, Town Manager, Finance, HR and General Administration.

5. Under Scope of Work item “F”, Email Archiving, would the ability to archive individual emails from the Users Workstation suffice for this requirement? If not could you expand on this requirement further, as there are many types of archiving solutions available?

A – Yes.

6. What Email Solution does the Township of Windermere utilize, both server and client types?

A – Outlook.

7. What is the average file size of the email and how many per month do you anticipate needing archiving?

A - Unknown

8. Under Scope of Work item “Imaging – Document Recognition”, are you requiring a type of Forms recognition to help with identifying and indexing documents automatically?

A – Yes.

9. Regarding the 175 boxes of records to be converted, will the boxes and documents be prepped with easily identifiable index points?

A – Yes.

10. Are all documents stored in boxes filed in folders?

A – Yes.

11. Are all documents to be converted 11”x17” or smaller?

A – No. there is some Architectural Plans that are permanent records that will need to be scanned.

12. Approximately how many document requests per day/week/month would you estimate while the boxes of records are in our possession? Would the actual hard copy be needed or could they simply be scanned and emailed back to the Township of Windermere?

A – Not many, if at all. Depends on why the document is needed.

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1. Once completed do you want the original books returned or to be destroyed once you have approved?  
A – Once Approved destruction may occur.
  2. For books that are bound with no way to disassemble can we cut the binding and scan the pages?  
A – Binding may be cut.
  3. For the Go forward Document management software. Is that to be installed on your site or Hosted by the vendor?  
A – On our site unless being hosted proves more beneficial.
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