



**CITY OF BELLEVUE**  
**CITY CLERK'S OFFICE**  
**ELECTRONIC DOCUMENT MANAGEMENT**  
**SYSTEM**

**REQUEST FOR PROPOSAL**

**OCTOBER 26, 2001**

## REQUEST FOR PROPOSALS

Notice is hereby given that the City of Bellevue, Washington will receive proposals for a:

### **City Clerk's Office Electronic Document Management System (EDMS)**

The City of Bellevue is requesting proposals to provide the City Clerk's Office with a fully developed and implemented solution for an EDMS that will contain the electronic repository of City Clerk's documents. The EDMS system will include the ability to input, store, access, route, and retrieve documents. It will also be expandable to include future City Clerk's Office workflow processes for Council packet and contracts. The system should be scalable to meet other departments' EDMS needs.

File with the General Services Division, Purchasing Section, City Hall, Fifth Floor, 11511 Main Street, Bellevue, Washington 98004, as follows:

***The City must receive proposals no later than 4 p.m. PST on November 30, 2001.***

Proposals received later than 4 p.m. PST, November 30, 2001 will not be considered.

Questions regarding the RFP requirements are to be submitted in writing no later than 4 p.m. **November 9, 2001** to:

Tomi Bonneville  
City of Bellevue  
City Clerk's Office  
P.O. Box 90012  
Bellevue, WA 98009-9012

FAX: (425) 452-2734  
E-mail: [tbonneville@ci.bellevue.wa.us](mailto:tbonneville@ci.bellevue.wa.us)

The City will issue an addendum in response to the questions by **November 16, 2001**.

A detailed Request for Proposal may be obtained from the General Services Division at the above address or by calling (425) 452-4870. The requirements, as well as significant evaluation factors and their importance are contained in the RFP. The RFP is also on our Web site at <http://www.ci.bellevue.wa.us>

The City of Bellevue reserves the right to reject any and all proposals and to waive irregularities and informalities in the request for proposal and evaluation processes. No vendor may withdraw its proposal for a period of 180 days after the proposal due date.

The City of Bellevue is committed to a program of equal employment opportunity regardless of race, creed, sex, age, nationality, or disability. The successful vendor must comply with the City

of Bellevue's Equal Opportunity requirements.

Dated this 26<sup>th</sup> day of October, 2001

Earle Stuard, CPPO  
General Services Manager

Published:  
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## **SECTION 1 INTRODUCTION AND PROPOSAL INSTRUCTIONS**

### *1.1 Introduction*

The objective of this Request For Proposal (RFP) is to solicit proposals to provide the City of Bellevue City Clerk's Office with a fully developed and implemented solution for an electronic document management system (EDMS) that will contain the electronic repository of City Clerk's documents. The EDMS system will include the ability to input, store, access, route, and retrieve documents. It will also be expandable to include future workflow processes for Council packet and contracts and other departments' needs for imaging, document management, workflow, authoring/versioning, and computer output to laser disk (COLD).

#### **1.1.1 About the City of Bellevue**

The City of Bellevue is located across Lake Washington from Seattle, Washington. Bellevue is the fifth largest city in Washington State, with a 2001 population of 111,500. Beginning in the 1980s, Bellevue evolved from a bedroom suburb into a primary employment center. It is the urban hub of the Eastside, accounting for 1 in 10 jobs in King County. Bellevue's strong job growth has been fueled by technology and knowledge firms. Bellevue enjoys a Moody's Investor Services rating of AAA for its healthy financial operations, low debt, and diverse economic base.

Bellevue has a Council-Manager form of government. Voters elect seven Council members to staggered four-year terms. Council members elect one member to serve as mayor for a two-year term. The City Manager is appointed by the City Council to head the administrative branch of city government. The City Manager directs all City operations, projects and programs and administers all policies and laws adopted by the Council.

The City employs 1,190 people. It provides a broad array of services to the community. These services are provided through the following departments:

- Fire – The Fire Department provides fire protection services and emergency medical services, including Medic One, to the community.
- Parks and Community Services – The Parks and Community Service Department is responsible for providing a system of parks and open spaces for the community, maintaining City parks, providing a comprehensive array of programs, and managing recreation facilities. It also ensures that a broad range of quality human services is available to citizens and manages probation and parole services.
- Planning and Community Development – Planning maintains and updates the City's Comprehensive Plan and advises the Council on planning and land use matters. It also manages long-range community planning, annexations, and the Neighborhood Enhancement Program. Community Development administers the development review process, which includes plan review, permits, inspections, enforcement, and land use management.
- Police – The Police Department's mission is to provide a safe environment in partnership with the community. The Department is responsible for enforcing local laws and

ordinances; investigating crimes and bringing those responsible to trial; and developing traffic education programs and enforcement policies that encourage the safe flow of traffic.

- Transportation – The Transportation Department designs, constructs, operates and maintains the City's transportation systems including streets, street lights, traffic signals, sidewalks and bikeways.
- Utilities – The Utilities Department provides drinking water, sewer, surface water, and solid waste systems and services in a safe, reliable, cost-effective, and innovative manner that supports a healthy economy and natural environment.

In addition to the direct service delivery departments above, the following departments provide internal support services:

- City Attorney - The City Attorney's Office provides legal support to the City Council, Community Councils, boards and commissions, City administration and departments. In addition, the Office drafts ordinances (laws) and resolutions for Council consideration; prosecutes local ordinance violations; and represents the City's interest in all legal actions
- City Clerk - The City Clerk's Office provides administrative and legislative support for the City Council, the two Community Councils, and Council-appointed boards and commissions; manages the City's official records, legislative index of Council actions, and centralized U.S. and internal mail delivery; and manages the City's Information Center and volunteer coordination program.
- Human Resources - The Human Resources Office provides human resources-related policy direction and guidance; designs the City's compensation and benefit plans; maintains the Affirmative Action Plan; designs employee development and training plans; and manages labor relations through negotiated contracts.
- Information Technology - The Information Technology Department's mission is to use technology to enhance community participation and provide exceptional public service.
- Finance – The Finance Department is responsible for maintaining the integrity of the City's financial functions in the most efficient manner.

### 1.1.2 EDMS Project Overview

In 1999, the City established a capital project to implement imaging, document management, and workflow capability enterprise-wide. Because of the diverse nature of City services and the competition for staff resources with other information technology projects, the enterprise project was designed in a phased approach spanning several years. Over a six-year period, we expect that all departments will implement EDMS applications to manage their documents and automate many of their business processes.

The first phase of the EDMS project, and the reason for this RFP, is to implement an EDMS application for the City Clerk's Office. The City Clerk's Office is responsible for managing the City's official records. Once past their active life cycles, official records are transitioned to the City Clerk's Office for retention and disposition. The City Clerk's EDMS application will provide the electronic repository and automate the document management functions for these records.

While this RFP is specifically aimed at an EDMS application for the City Clerk's Office, we anticipate that the selected vendor will be able to expand their services to meet other

department's needs. The City expects to develop a long-term, collaborative relationship with the selected vendor for the EDMS system.

**1.2 RFP and Proposal Submission Logistics**

This section includes pertinent information regarding contacts, schedule, questions, and amendments.

**1.2.1 RFP Coordination/Communication**

Inquiries concerning proposal submission dates, instructions, and logistics should be directed to the **General Services Manager** listed below.

Name:.....Earle Stuard  
 Address:.....City of Bellevue  
 .....General Services Department  
 .....11511 Main Street, Fifth Floor  
 .....Bellevue, WA 98004  
 Telephone:....(425) 452-6894  
 Fax: .....(425) 452-4483  
 E-mail:.....estuard@ci.bellevue.wa.us

Questions regarding requirements, questions asked, and the attached Application Design Document should be directed to the **RFP Coordinator** listed below. Any oral communications will be considered unofficial and non-binding on the City. The vendor should rely only on written statements issued by the RFP Coordinator.

Name: ..... Tomi Bonneville, Records Manager  
 Address:..... City of Bellevue  
 ..... City Clerk's Office  
 ..... 11511 Main St. Suite  
 ..... Bellevue, Washington 98004  
 Telephone: .... 425-452-6464  
 Fax:..... 425-452-2734  
 E-mail: ..... tbonneville@ci.bellevue.wa.us

**1.2.2 Procurement Schedule**

The City intends to procure the replacement EDMS in accordance with the following schedule. However, the City reserves the right to add, drop, or reschedule procurement milestones as necessary.

<b>Event</b>	<b>Time</b>	<b>Date</b>
Release RFP to Vendors	4:00pm	10/26/01
RFP Questions Due (to RFP Coordinator)	4:00pm	11/9/01
Answers to RFP Questions Released	4:00pm	11/16/01
Proposals Due	4:00pm	11/30/01

Event	Time	Date
Proposal Evaluations Complete	4:00pm	12/14/01
Vendor Short List Released	4:00pm	12/21/01
Vendor Demonstrations Complete	4:00pm	1/18/02
Vendor Reference Checks Complete	4:00pm	1/25/02
Site Visits (optional) Complete	4:00pm	2/1/02
Announce Apparently Successful Vendor	4:00pm	2/6/02
Contract Negotiations Complete	4:00pm	3/7/02
Contract Approval Complete	4:00pm	4/5/02
Council Approval	8:00pm	4/15/02
Signed Contract Delivered to Vendor	4:00pm	4/17/02
Work Begins	8:00am	4/22/02

### 1.2.3 Questions Regarding the RFP

Questions regarding the RFP requirements are to be submitted in writing no later than the date and time specified in Section 1.2.2.. Questions may be submitted to Tomi Bonneville, the RFP Coordinator, via e-mail, fax, or U.S. Postal Service.

The City will issue an addendum in response to the questions by 11/16/01.

### 1.2.4 RFP Amendments

The City reserves the right to request any respondent to clarify its proposal or to supply any additional material deemed necessary to assist in the evaluation of the proposal.

The City reserves the right to change the RFP schedule or issue amendments to the RFP at any time. The City also reserves the right to cancel or reissue the RFP.

## 1.3 Proposal Instructions

This section provides specific instructions for completing and submitting proposals.

### 1.3.1 Proposal Response Date and Location

Proposals must be received by the **City of Bellevue General Services Division** no later than the date and time specified in section 1.2.2. All proposals and accompanying documentation will become the property of the City and will not be returned.

Proposals submitted after the proposal due date and time will not be accepted nor will additional time be granted to any vendor unless by addendum to this RFP.

### 1.3.2 Required Response Format and Number of Proposals

A total of **one original, 6 copies and an electronic copy** of the vendor's proposal, in its entirety, must be received as specified in section 1.2.2. Paper copies may **not** be submitted by facsimile transmission.

Proposals should be prepared simply, providing a straightforward, concise delineation of the approach and capabilities necessary to satisfy the requirements of the RFP. Technical literature and elaborate promotional materials, if any, must be submitted separately. Emphasis in the proposals should be on completeness, clarity of content and adherence to the presentation structure required by this RFP.

Vendor proposals must be submitted in the format specified below. Please provide responses in the format of tables provided. An electronic Word template has been provided to facilitate your response. Please copy tables as needed (e.g., tables for project staff and customer reference information). **Vendors that deviate from this format may be deemed non-responsive.**

Proposals must include:

**I. Cover Letter**

Signed by vendor representative authorized to bind the proposing firm contractually.

**II. Table of Contents**

**III. Executive Summary**

Provide a one-page high-level summary of your proposal.

**IV. Proposal**

Provide a description of the proposed solution. This section should not exceed three pages.

**V. Responses to Section 2 - Vendor Information Requirements**

**A.** Complete the vendor information tables in Section 2. Duplicate any tables as necessary.

**B.** Be sure to provide an answer to each requirement. If the requirement does not pertain to your proposal, enter "N/A" in the table. If there is no table, be sure to provide the documentation requested. **Vendors who leave a requirement blank may be deemed non-responsive.**

**C.** The vendor requirements are in:

- 1) Section 2.1 Company Information
- 2) Section 2.2 National, Regional, and Local Office Information
- 3) Section 2.3 Financial and Credit References
- 4) Section 2.4 Support Staff Information
- 5) Section 2.5 Client References
- 6) Section 2.6 Contract Performance

**VI. Responses to Section 3 - Technical Infrastructure Requirements**

**A.** Complete the technical requirement tables in Section 3. Duplicate any tables as necessary.

**B.** Be sure to provide an answer to each question. If the question does not pertain to your proposal, enter "N/A". **Vendors who leave a question blank may be deemed non-responsive.**

- C. The Technical Requirements are in:
  - 1) Section 3.1 Technical Architecture
  - 2) Section 3.2 System Implementation and Operations

**VII. Responses to Section 4 - Functional Requirements**

- A. Answer the questions in Section 4.
- B. Be sure to provide an answer to each question. If the question does not pertain to your proposal, enter "N/A". **Vendors who leave a question blank may be deemed non-responsive.**
- C. The functional requirements are in:
  - 1) Attachment A – City Clerk's EDMS Application Design Document

**VIII. Responses to Section 5 – Cost Proposal**

- A. Provide cost proposal as instructed in Section 5.

**IX. Appendices**

- A. Non-Collusion Certificate. Appendix A.
  - This certificate must be notarized. Please provide as an attachment to your proposal.
- B. Insurance Requirements. Appendix B.
  - Please provide Certificates of Insurance in the required amounts as an attachment to your proposal.
- C. Equal Opportunity Requirements
- D. Equal Opportunity Compliance Form. Appendix D.
  - Please complete and sign the form. Please provide as an attachment to your proposal.
- E. Public Records Disclosure
- F. Copy of your software licensing agreement
  - Please provide as an attachment to your proposal.

The City encourages the use of two-sided printing on recycled paper when submitting the proposal.

**1.3.3 Completeness of Proposal**

The vendor must attach a cover letter signed by a vendor representative authorized to bind the proposing firm contractually. This letter must identify any exceptions that the vendor takes to the City's RFP, or declare that there are no exceptions taken to the RFP.

**1.3.4 Vendor's Cost to Develop Proposal**

Costs for developing proposals in response to the RFP are entirely the obligation of the vendor and shall not be chargeable in any manner to the City.

**1.3.5 Withdrawal of Proposal**

Proposals may be withdrawn at any time prior to the submission time specified in section 1.2.2, **provided notification is received in writing**. Proposals cannot be changed or

withdrawn after the time designated for receipt.

**1.3.6 Rejection of Proposals - Waiver of Informalities or Irregularities**

The City reserves the right to reject any or all proposals, to waive any minor informalities or irregularities contained in any proposal, and to accept any proposal deemed to be in the best interest of the City.

**1.3.7 Proposal Validity Period**

Submission of a proposal will signify the vendor's agreement that its proposal and the content thereof are valid for 180 days following the submission deadline and will become part of the contract that is negotiated between the City and the successful vendor.

**1.4 Proposal Evaluation**

The RFP Coordinator and an evaluation team comprised of staff from the City Clerk's Office, Information Technology, and other departments will conduct the evaluation. The evaluators will consider how well the vendor's proposed solution meet the needs of the City, as described in the vendor's response to each requirement. It is important that the responses be clear and complete, so that the evaluators can adequately understand all aspects of the proposal.

Based on the proposal scores, the evaluation team will select vendors to participate in an oral presentation and product demonstration in Bellevue. The oral presentations and demonstrations will be evaluated on the performance of tasks outlined in the demonstration script and responses to ad hoc requests and inquiries.

**1.4.1 Scoring and Evaluation Factors**

The evaluation factors reflect a wide range of considerations. While cost is important, other factors are also significant. Consequently, the City may select other than the lowest cost solution. The objective is to choose a vendor capable of providing a reliable and effective solution within a reasonable budget.

**Proposal evaluation:** All proposals will be evaluated using the same criteria.

<b>Evaluation Criteria Categories</b>	<b>Proposal Section</b>
Vendor Instructions and Format Requirements	1.1 – 1.6
Vendor Information Requirements	2.1 – 2.4
Past Performance	2.5 – 2.6
Technical requirements	3.1
System Implementation	3.2
Functional Requirements	4
Cost Requirements	5
Overall Quality of Response	All Sections

Customer references will be evaluated for the top vendors after the invitation to participate in the oral presentations and demonstration. The City reserves the right to request additional information, interviews, demonstrations or any other type of clarification of proposal information it deems necessary to evaluate proposals.

### 1.4.2 Minimum Qualifications

The following represent minimum bid requirements for the City Clerk's Office EDMS project.

- Document capture capabilities - scan, fax, upload
- Index capabilities - manual, barcode, forms processing, intelligent character recognition/optical character recognition (ICR/OCR), upload
- Index requirements - 40+ fields, up to 256 characters
- Magnetic/optical storage capabilities
- Viewer capabilities - local (thick client) remote/Internet (thin client)
- Annotation capability - sticky note, direct annotation
- Search capability - search across and within all defined indexes, full text search for documents that have been recognized or uploaded
- Workflow and workflow reporting capability
- Record retention and disposition capability
- Output capability - print, fax, internet and CD-ROM
- 5 product vendor references
- 3 software integrator references
- Compatible with Windows NT and 2000 (desktop and server) and MS SQL Server or Oracle

### 1.4.3 Oral Presentations and Demonstrations

The City anticipates including up to four vendors in the oral presentations and demonstration process. Vendors in this selection phase will be invited to demonstrate their product's capability to meet the requirements defined in Section 4 of this document. The City will provide vendors a script prior to the demonstration. The focus of the demonstration is as follows:

- Ability of the system to accommodate typical, complex City of Bellevue requirements without resorting to custom code.
- Ability of the system to integrate with the City's hardware, software and data standards and architectures.
- System documentation quality and completeness.

Vendors will:

- Demonstrate the quality and completeness of all standard and optional documentation provided with the system, which includes third party products.
- Have documentation available at the demonstration site.
- Have available at demonstration site all standard reports.

Evaluation of oral presentations and demonstrations will be based on:

- Overall demonstrated functionality

- Ease of use
- Prepared scripts
- Ad-hoc requests and inquiries

#### 1.4.4 Site Visits

The City may choose to conduct site visits to the vendor's place of business and/or vendor's clients as part of the evaluation process. The site visits may be used to determine the apparently successful vendor.

Evaluation of the vendor client sites will be based on the following:

- The customer's assessment of the vendor's service during system implementation.
- The customer's assessment of the quality of vendor's ongoing support.
- Overall user satisfaction with the system.

### 1.5 Vendor Selection

Upon completion of the proposal evaluations, the evaluation team will announce the Apparently Successful Bidder by the date and time specified in Section 1.2.2.

#### 1.5.1 Vendor Debriefing

Vendors that submitted an unsuccessful proposal may, within 5 days of the publication of the Announcement of the Apparently Successful Vendor notice, request a meeting for debriefing and discussion of their proposals. The request must be in writing and addressed to General Services Manager listed in Section 1.2.1. It is acceptable to deliver the letter by facsimile transmission or e-mail.

#### 1.5.2 Vendor Protest Procedure

A vendor must file any protest of the 'Announcement of the Apparently Successful Vendor' notice or of a notice that a proposal is non-responsive by 4:00 PM on the tenth business day after the publication of notification by the City.

Protesting parties must demonstrate as part of their protest that they made every reasonable effort within the schedule and procedures of this RFP to resolve the basis of their protest during the acquisition process. A reasonable effort includes asking questions, seeking clarifications, requesting addenda, and otherwise alerting the City to perceived problems so that corrective action could be taken prior to the selection of the apparently successful vendor. The City will not consider any protest based on items that could have been or should have been raised prior to the deadline for submitting questions or requesting addenda. The filing of protest shall not prevent the City from executing a contract with any other vendor.

All protests shall be in writing, contain a complete statement of the grounds for protest, and be filed with the General Services Manager listed in Section 1.2.1. It is acceptable to deliver the letter by facsimile transmission or e-mail.

### 1.5.3 Contract Award and Execution

The City reserves the right to make an award without further discussion of the proposal submitted. Therefore, the proposal should be initially submitted on the most favorable terms the vendors can offer.

The City shall not be bound or in any way obligated until both parties have executed a vendor contract.

The general conditions and specifications of the RFP and the successful vendor's response, as amended by agreement between the City and the vendor, including e-mail or written correspondence relative to the RFP, will become part of the contract documents. Additionally, the City will verify vendor representations that appear in the proposal. Failure of the vendor's products to perform as represented may result in elimination of the vendor from competition or in contract cancellation or termination.

The vendor selected as the apparently successful vendor will be expected to enter into a contract with the City. A sample contract will be provided prior to negotiations.

The foregoing should not be interpreted to prohibit either party from proposing additional contract terms and conditions during negotiations of the final contract.

If the selected vendor fails to sign the contract within 5 business days of delivery of the final contract, the City may elect to cancel the award and award the contract to the next-highest-ranked vendor.

All parties may incur no cost chargeable to the proposed contract before execution of the contract.

## 1.6 Vendor Requirements

This section defines requirements that vendors must meet.

### 1.6.1 Business Registration and Taxation

The vendor awarded the contract will be subject to the State of Washington and City of Bellevue business registration and business taxation as provided in Chapters 4.02 and 4.08 of the Bellevue City Code.

### 1.6.2 Insurance Requirements

The City will require the selected vendor to comply with the insurance requirements detailed in Appendix B.

### 1.6.3 Equal Opportunity Requirement

The selected vendor shall comply with City of Bellevue Equal Opportunity Requirements, as set forth in Appendix C. The City is committed to a program of equal employment

opportunity regardless of race, color, creed, sex, age, nationality, or disability. Minority, women-owned, and disadvantaged businesses are encouraged to respond to this RFP.

#### 1.6.4 Public Records

The City of Bellevue is subject to state law (RCW Chapter 42.17) regarding the disclosure of public records. Proposals and other materials submitted by vendors are public records and may be subject to public disclosure in whole or part and may be released by the City in the event of a request for disclosure.

**SECTION 2 VENDOR INFORMATION REQUIREMENTS**

This section must be filled out completely. Those areas that do not apply to your proposal, please mark with N/A. **Do not leave any space blank.**

**2.1 Company Information**

Please complete the following tables for **all** companies involved in the proposal.

1. Name of company and role on project (e.g., product vendor, SW integrator, etc.)	
2. Name of parent company	
3. Length of time in business	
4. Gross revenue for the prior fiscal year (in US dollars). Provide in parenthesis ( ) the percentage of gross revenue generated by implementation and licensing or use of proposed software	
5. Total number of installed seats. Provide in parenthesis ( ) average number of seats per installation.	
6. Provide example of customers. Specifically highlight customers in State and Local government.	
7. Total number of employees	
8. Distribute your total number of employees into the following functional areas. Provide company total and identify in parenthesis ( ) the percentage of employees that are dedicated to the list of products and services you listed above.	
Customer and software support	
Installation and training	
Product development	
Technical programming and customization	
Other professional services	
Sales, marketing, and administrative support	

Describe the types of products and services offered:

City Clerk's Office Electronic Document Management System Request for Proposal

<p>1. List products and services offered related to:</p> <ul style="list-style-type: none"> <li>• Imaging and electronic folder management</li> <li>• Electronic forms processing</li> <li>• Electronic document management</li> <li>• Electronic records retention</li> <li>• Computer output to laser disk (COLD)</li> <li>• Workflow</li> <li>• Electronic commerce</li> <li>• Web content management</li> </ul>	<p>2. Provide description of each product/service</p>	<p>3. List all industry interoperability standards that products support (e.g., ODMA, DMA, WfMC, XML, etc.)</p>	<p>4. Provide total number of customers for each product/service.</p>

2.2 National, Regional, and Local Office Information

Please complete the following table:

1. Location of national office			
2. Location of regional office nearest to Bellevue, WA			
3. Location of local office nearest to Bellevue, WA			
4. Identify the number of personnel at each location that would provide support for the proposed software (add lines as necessary)			
Job Title	Location	# of Employees	

2.3 Financial and Credit References

Please provide the most recent audited financial statement for each company or credit references that can verify the financial standing of the company.

**2.4 Support Staff Information**

Please complete the following table for each of the key project staff members (including subcontractors) who will be assisting the City with implementation and training. Key staff must include your proposed project managers and technical leads.

1. Staff member name	
2. Position in the company	
3. Length of time in position	
4. Project position and responsibilities	
5. Hours dedicated to project onsite	
6. Hours dedicated to the project remotely	
7. Education	
8. Previous work experience	
9. Technical skills and qualifications for the project position	
10. Experience installing proposed system: <ul style="list-style-type: none"> <li>• Client name</li> <li>• Contact person and phone number</li> <li>• Client size (population or customers served)</li> <li>• Project position/responsibilities</li> <li>• Start date</li> <li>• Scheduled end date</li> <li>• Actual end date</li> </ul>	

**2.5 Client References**

Please complete the following table. Product vendors must provide at least five recent references using the proposed software. If product vendor is different from software integrator, the software integrator must provide at least three recent references. If a client has received successive version installations, please include each version installation in the table below to illustrate longevity and continuity. We would prefer to see references of those clients using the proposed software in our current environment, Microsoft Windows NT or 2000 with either an Oracle or MS SQL Server database.

1. Reference Name	
2. Contact Name	
3. Title	
4. Phone number	
5. Customer Type e.g. govt.	
6. Customer Size (e.g., # of employees)	
7. Size of Client Customer Base	
8. Software Version	
9. Installation Dates	

## 2.6 *Contract Performance*

If the vendor has had a contract terminated for default during the past five years, all such incidents must be described. Termination for default is defined as notice to stop performance due to the vendor's non-performance or poor performance, and the issue was either (a) not litigated; or (b) litigated and such litigation determined the vendor to be in default.

Submit full details of all terminations for default experienced by the vendor during the past five years, including the other party's name, address, and telephone number. Present the vendor's position on the matter. The City will evaluate the facts and may, at its sole discretion, reject the vendor's proposal if the facts discovered indicate that completion of a contract resulting from this RFP may be jeopardized by selection of the vendor.

If the vendor has experienced no such terminations for default in the past five years, so declare.

If the vendor has had a contract terminated for convenience, non-performance, non-allocation of funds, or any other reason, which termination occurred before completion of the contract, during the past five years, describe fully all such terminations, including the name, address and telephone number of the other contracting party.

A vendor response which indicates that the requested information will only be provided if and when the vendor is selected as the apparently successful vendor is not acceptable. Restricting the vendor response to include only legal action resulting from terminations for default is not acceptable.

## **SECTION 3 TECHNICAL INFRASTRUCTURE**

This section documents the technical requirements for the EDMS and requests information from the vendor that is to be provided in accordance with the instructions contained in Section 1.

### **3.1 Technical Architecture**

The selected solution must reside within the City of Bellevue technical infrastructure. This section describes the components of that infrastructure.

#### **3.1.1 Network**

The network is a managed TCP/IP, switched Ethernet architecture over fiber between geographically dispersed locations. The City's data communications network is Gigabit Ethernet backbone with switched 10/100 Ethernet at the desktop via CAT 5 UTP cabling. The City's core network connects five separate locations: City Hall, the Leavitt Building, Police Annex, the Bellevue Service Center, and the Public Safety Communications Center. Database and application servers will be located at City Hall. In addition, the City's WAN (Wide Area Network) consists of 30 remote locations including Fire stations, Parks facilities, Police substations, and Utilities facilities. Average network bandwidth to these sites is 256K over fractional frame relay. Most clients will be located at City Hall and Leavitt Building.

Describe any constraints to the performance of the proposed system that can be expected to result from this network configuration.

Vendor remote access will be provided by VPN. Remote dial-up access is not permitted.

Discuss your company's plans to migrate the application to utilize internet/intranet technology.

#### **3.1.2 Servers and Operating System**

The City of Bellevue's data center has a limited access, raised floor, and temperature and humidity controlled environment. The standard configuration includes rack mounted Compaq Proliant servers with redundant power supplies connected to dual power distribution units, Smart Array SCSI controllers, Ultra 2 or Ultra 3 SCSI disk drives, and Compaq Gigabit or 10/100 Ethernet network cards. Typically, three or more drives are configured as RAID5 and two drives are mirrored to act as the system drive. Database servers are configured as RAID 0+1 for greater redundancy and performance.

City standards for the servers specify the operating system to be Microsoft Windows 2000 sp2 or NT 4.0 sp6a or greater, installed on the C partition, and all applications are restricted to residing on non-O/S disk partitions. All servers are backed up on a regular schedule using Veritas' Backup Exec software with Accelerator agents and Open File options. All servers

also have Norton Antivirus, Compaq Insight agent services, and Microsoft SMS management clients installed. All servers are configured for remote administration with SMS or terminal services. System security will be integrated with Windows NT domain security.

Please provide a complete and detailed physical configuration of your proposed system. All hardware (including servers, scanners, storage devices, etc.) and software should be identified. Also identify any minimum and recommended configuration requirements.

Please provide a logical architecture of your proposed solution. Identify all layers and discuss methods of interaction between layers.

3.1.3 Client Workstations {tc "3.1.2 Client Workstations " \ 3}

The current PC standard is a Compaq iPAQ with a Pentium III 866 processor, 128 MB of memory, and 10 GB of disk space. There are less capable PCs in the organization because PCs are on a three-year replacement schedule. Standard clients have installed Windows NT or 2000, MS Office, MS Outlook, and Norton Antivirus.

Please specify the **minimum** and **recommended** workstation configuration (e.g., disk space, memory, and processor speed) required to operate the proposed solution.

3.1.4 Relational Database Management System {tc "3.1.3 Relational Database Management System " \ 3}

Databases must be in either Oracle 8.1.6 or Microsoft's SQL Server version 7, or greater.

Which database product is recommended and why?

What RDBMS does the vendor use for primary development of the proposed product?

What are the two leading RDBMSs among the install base of the current version of the proposed product? Approximately what share of the total install base does each represent?

3.1.5 Scanner/Copier

The City has recently awarded a contract to IKON to install Canon imageRunner equipment throughout the City. Canon imageRunners (model numbers 330, 400, 550, 2200, and 5000) provide the capability to print, fax, copy, and scan documents. Thirty-two copier/scanners have been installed.

3.2 *System Implementation and Operations*{tc "

3.4 **SYSTEM IMPLEMENTATION** " \ 2}

3.2.1 Project Implementation and Training Plan {tc "3.4.1 Implementation Planning " \ 3}

Describe approach to implementation. Provide a detailed project implementation plan that

includes a Gantt chart showing beginning and ending dates and staff assignments for all major tasks and hours.

Provide a detailed description of your training plan and approach. Include your recommended course content, training location, and materials and tutorials you provide (e.g. text, multimedia, Intranet, Internet, etc.).

### 3.2.2 Source Code

Identify the programming language(s) in which the client and business rules layers of the proposed system are written and whether the source code is available. If the source code is not available, describe any escrow arrangements that have been made in the event the vendor is unable to continue providing upgrades and include a copy of the escrow agreement.

### 3.2.3 System Scalability

Discuss the scalability of the proposed system. As the number of users, documents, or workflow processes grow, how would the hardware need to be expanded? What is the impact on software performance?

### 3.2.4 System Maintenance

Describe the approach used to efficiently roll forward user modifications into new releases and versions of the proposed system.

Discuss the software upgrade delivery schedule for the proposed system with respect to the various operating system platforms you support.

Identify the application upgrade tools you propose to provide which will help simplify and streamline the installation of application and database upgrades, including any tools which test changes resulting from upgrades and/or business rule changes.

Describe the proposed tools and techniques for automatic distribution of the client application software.

Describe what is provided with your product's annual maintenance fees. Include application specifics, database specifics, and third-party products.

### 3.2.5 Support

Describe your ongoing user support, including whether you provide a service call desk, procedures for handling different types of calls, ability to prioritize critical calls, and ability to respond to calls within a reasonable time period. The City prefers a response from the service desk to non-emergency calls within four hours and a response to critical calls (delay in work or loss of data due to system failure) within 1 hour. Provide validation of this capacity.

The vendor should provide remote support. Describe your method for accomplishing this.

Do you provide on-site support if needed?

Describe how problems and/or bugs are reported, fixes developed, and status tracked for the proposed system.

Describe how you provide information to keep your clients informed of outstanding problems and fixes for the proposed system.

Describe your process for receiving, evaluating, and implementing requests for enhancements to the proposed system, after it is installed and in use.

Identify national and regional user groups. Describe the role of the vendor and third party solution providers in user group programs. Provide a program or agenda from a recent meeting along with a user group contact.

Identify any training program(s) that you offer to introduce users to software updates.

**3.2.6 Support Staff Resources**{tc "3.3.8 Support Staff Resources " \l 3}

Recommend a typical range of City personnel needed to maintain the proposed system for 10-20 concurrent users in a normal production environment from the following perspectives: database management, network and server support, system administration, desktop support, and user (functional) support.

**3.2.7 Licensing**{tc "3.3.9 Licensing " \l 3}

What is the support and maintenance service included in the initial software license fee quotation?

What limits are there on escalation of the annual maintenance fee?

Identify the number of sites where the proposed system is installed and the estimated number of seats licensed.

What is the incremental license fee to add an additional concurrent user?

How is licensing handled for integration with another system?

How is licensing handled for Internet access?

Include a copy of your software license agreement.

**3.2.8 System Integration**

{tc "3.3.10System Interfaces and Connectivity " \l 3}The EDMS system shall provide the ability to integrate with other systems. It is expected that integration will occur over the length of the six-year enterprise project. Below are the City systems that may be candidates for integration with the EDMS:

Product and Version	Vendor	Description
---------------------	--------	-------------

City Clerk's Office Electronic Document Management System Request for Proposal

Product and Version	Vendor	Description
Office 97	Microsoft	Standard desktop productivity software. Planning to migrate to Office XP in 2002.
Outlook 98/Exchange 200	Microsoft	Standard e-mail, calendar, and collaboration software. Planning to migrate to Outlook 2002 in 2002.
Informed 3.0.5	Shana	Standard electronic forms package that consists of designer and filler modules.
FMIS	In-house custom developed	Financial system developed in PowerHouse residing on DEC Alpha platforms.
ArcInfo 8.1	ESRI	Geographical Information System (GIS).
Amanda 3.4	CSDC	Permitting system with Oracle backend. Planning to migrate to Amanda 4.0 in 2002.
Maximo 4.0	PSDI	Material management system for Utilities (Oracle backend) and Facilities (SQL Server backend).
Workforce Central Suite 3.2	Kronos	Timekeeping system with Oracle backend.
SunPro v.26	Aether Systems	Fire records management system with SQL Server backend.
Versatile 5.1.9	Zasio	City Clerk's records management system with Oracle back-end.
MapGuide 5.0	AutoDesk	Transportation GIS.
e-Gov	In-house custom developed	Includes web applications for permitting, Parks registration, business licenses, and the e-commerce infrastructure using, Microsoft Commerce Server, Microsoft BizTalk Server, and a payment gateway service (to be selected). Planning to go live with permitting application 4Q 2001 – 1Q 2002.
InfoCenter 2.6	MASI	Police records management system with SQL Server backend. Planning to go live 1Q 2002.
Safari	RecWare (apparently successful vendor)	Parks registration and scheduling system. Planning to go live in 2002.
Others	To be determined	The City is in the process of selecting systems for Utilities' customer information system and

## City Clerk's Office Electronic Document Management System Request for Proposal

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Product and Version	Vendor	Description
		fleet management system.

Discuss the methods, tools, and documentation proposed to develop and maintain interfaces to other systems. Specifically address any past integration efforts with any of the systems listed above.

## **SECTION 4 CITY CLERK'S EDMS FUNCTIONAL REQUIREMENTS**

This section describes the functional requirements for the City Clerk's Office EDMS and requests information from the vendor that is to be provided in accordance with the instructions contained in Section 1. The requirements and questions are documented in Attachment A – City Clerk's EDMS Application Design Document.

## **SECTION 5 COST PROPOSAL**

Vendors must itemize the unit and extended price for each product and service proposed as part of the City Clerk's EDMS. Cost information must include all expected implementation and operating costs, both one-time and ongoing. Specific model numbers and capacities should be included. Information about license sizes must be provided. Vendors should describe and quote optional components (including query tools, report writers, etc.) as individual and separate items. Any upgrade to the base system needed for optional components must be included in the cost of those components. Also, vendor should identify which components the City can purchase independently and define the impact to the other costed items if the City should choose to do so.

- Application Software Modules
- Hardware Components
- System Installation and Setup
- Implementation Planning and Assistance
- Training
- Document Conversion (optional)
- Interface Development
- Documentation
- Annual Maintenance and Support
- Travel and Expenses (estimated)

In addition to the breakdown of costs described above, the City of Bellevue would like to have a quoted hourly rate for professional services that may be required to complete our EDMS project, but were not anticipated and included in this RFP. The quoted rate(s) could be applied for the duration of the project (as described herein). They should include, but are not limited to: project management, programmer/analyst, and technical support analyst.

All prices are to be in U.S. dollars. All applicable taxes to be paid by the City must be separately shown. The vendor awarded the contract will be subject to City of Bellevue business registration and business taxation as provided in Chapters 4.02 and 4.08 of the Bellevue City code. (For details call the City Tax office at 425-452-2011.)

At the end of this section, attach your proposal for a payment schedule, including proposed retainage. With each date and amount explain why those particulars were chosen.

## **APPENDICES**

**APPENDIX A**

**NONCOLLUSION CERTIFICATE**

STATE OF \_\_\_\_\_

COUNTY OF \_\_\_\_\_

The undersigned, being duly sworn, deposes and says that the person, firm, association, co-partnership or corporation herein named, has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive bidding in the preparation and submission of a proposal to the City of Bellevue for consideration in the award of a contract on the improvement described as follows:

**Customer Information System**

\_\_\_\_\_  
(Name of Firm)

By: \_\_\_\_\_  
(Authorized Signature)

Title: \_\_\_\_\_

Sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public

CORPORATE SEAL

**APPENDIX B**

**INSURANCE REQUIREMENTS**

The Contractor shall procure and maintain for the duration of this Agreement insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees or subcontractors. The cost of such insurance shall be paid by the Contractor. Insurance shall meet or exceed the following unless otherwise approved by the City. Questions regarding insurance requirements can be discussed with the City's Risk Management Office, 425-462-2747.

**A. Minimum Scope of Insurance**

1. Insurance Services Office Commercial General Liability coverage ("occurrence" form CG 0001) (Ed. 10/1/93), or, Insurance Services Office form number GL 0002 (Ed. 1/73) covering Comprehensive General Liability and Insurance Services Office form number GL 0404 (Ed. 1/81) covering Broad Form Comprehensive General Liability.
2. Insurance Services Office form number CA 0001 (Ed. 12/93), covering Automobile Liability code 1, "any auto," for activities involving other than incidental personal auto usage.
3. Worker's Compensation coverage as required by the Industrial Insurance Laws of the State of Washington.
4. Consultant's Errors and Omissions or Professional Liability applying to all professional activities performed under the contract.

**B. Minimum Levels of Insurance**

1. Comprehensive or Commercial General Liability: \$1,000,000 combined single limit per occurrence for bodily injury, personal injury and property damage.
2. Automobile Liability: \$1,000,000 combined single limit per accident for bodily injury and property damage.
3. Workers' Compensation coverage as required by the Industrial Insurance laws of the State of Washington.
4. Consultant's Errors or Omissions or Professional Liability: \$1,000,000 per occurrence and as an annual aggregate.

**C. Deductibles and Self-Insured Retentions**

Any deductibles or self-insured retentions must be declared to and approved by the City. In the event the deductibles or self-insured retentions are not acceptable to the City, the City reserves the right to negotiate with the Contractor for changes in coverage deductibles or self-insured retentions or, alternatively, require the Contractor to provide

evidence of other security guaranteeing payment of losses and related investigations, claims administration and defense expenses.

D. **Other Provisions**

Wherever possible, the policies are to contain, or be endorsed to contain, the following provisions:

1. General or Commercial Liability and Automobile Liability Coverages

- a. The City, its officials, employees and volunteers are to be covered as additional insureds as respects: liability arising out of activities performed by or on behalf of the Contractor; products and completed operations of the Contractor; premises owned, leased or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protection afforded to the City, its officials, employees or volunteers.
- b. The Contractor's insurance shall be primary insurance as respects the City, its officials, employees and volunteers. Any insurance or self-insurance maintained by the City, its employees or volunteers shall be excess of the Contractor's insurance and shall not contribute with it.
- c. Any failure to comply with reporting provisions of the policies shall not affect coverage provided to the City, its officials, employees or volunteers.
- d. Coverage shall state that the Contractor's insurance shall apply separately to each insured against whom claim is made or suit is brought, except with respect to the limits of the insurer's liability.

2. All Coverages

Each insurance policy required by this clause shall state that coverage shall not be canceled by either party except after thirty (30) days prior written notice has been given to the City.

E. **Acceptability of Insurers**

Insurance is to be placed with insurers with a current Bests' rating of A:XII, or with an insurer acceptable to the City.

F. **Verification of Coverage**

Contractor shall furnish the City with certificates of insurance affecting coverage required by this clause. The certificates for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf and shall name the City as an "additional insured" except for coverages identified in A.4. above. The certificates are to be received and approved by the City before work commences. The City reserves the right to require complete, certified copies of all required insurance policies at any time.

G. **Subcontractors**

Contractor shall include all subcontractors as insureds under its policies or shall require subcontractors to provide their own coverage. All coverages for subcontractors shall be subject to all of the requirements stated herein.

## APPENDIX C

### EQUAL OPPORTUNITY REQUIREMENTS

Applications: The following materials pertain to the Equal Opportunity Requirements of the City of Bellevue as set forth in Chapter 4.28.143 of the Bellevue City Code. All contractors, subcontractors, consultants, vendors and suppliers who contract with the City in a total amount of thirty-five thousand dollars or more within any given year must comply with these requirements.

Affidavit: Before being considered for a contract of the magnitude listed above, all contractors will be required to sign and submit the "Affidavit of Equal Opportunity Compliance" as part of their proposal or upon the request of the Purchasing & Graphic Services Manager.

Compliance: The City of Bellevue reserves the right to randomly select contractors, subcontractors, consultants, vendors or suppliers to be audited for compliance of the requirements listed. During this audit, the contractors, etc., will be asked for a specific demonstration of compliance with the requirements.

Noncompliance: A finding of a noncompliance may be considered a breach of contract and suspension or termination of the contract may follow.

City contact: The City's Compliance Officer is the Purchasing & Graphic Services Manager, and specific questions pertaining to this section may be directed to the Purchasing Division at (425) 452-6894.

Section 4.28.143 of the Bellevue City Code establishes the requirements for all contractual service providers:

"All contractors, subcontractors, consultants, vendors and suppliers who contract with the City of Bellevue in a total amount of thirty-five thousand dollars or more within any given year are required to take affirmative action and comply with the following requirements of this section. There shall be included in any contract between such contractual service provider and the City of Bellevue the following provisions:

1. Contractor shall make specific and constant recruitment efforts with minority and women's organizations, schools, and training institutions. This shall be done by notifying relevant minority and women's organizations.
2. Contractor shall seek out eligible minority and women contractors to receive subcontract awards. Appropriate minority and women contractors shall be notified in writing of any bids advertised for subcontract work.
3. Contractor shall provide a written statement to all new employees and subcontractors indicating commitment as an equal opportunity employer and the steps taken to equal treatment of all persons.

## City Clerk's Office Electronic Document Management System Request for Proposal

4. Contractor shall actively consider for promotion and advancement available minorities and women.
5. Contractor is encouraged to make specific efforts to encourage present minority and women employees to help recruit qualified members of protected groups.
6. Contractor is encouraged to provide traditional and nontraditional employment opportunities to female and minority youth through after school and summer employment.
7. Contractor is encouraged to assist in developing the skills of minorities and women by providing or sponsoring training programs.

Willful disregard of the City's nondiscrimination and affirmative action requirements shall be considered breach of contract and suspension or termination of all or part of the contract may follow.

All documents related to compliance steps listed above shall be presented upon the request of the Purchasing Manager. The Purchasing Manager shall serve as the compliance officer for the city and is authorized to develop and issue procedures for the administration of this section.

In order to more readily determine compliance with BCC 4.28.143, the following interpretations are provided:

- Requirement 1. When a contractor needs to recruit, they must notify minority and women's organizations, schools and training institutions. Such "notification" can be in the form of an advertisement in newspapers or trade journals of general circulation in the metropolitan Seattle area.  
When the contractor hires through a union hiring hall, the contractor must be able to provide confirmation, upon request by the City, that the hiring hall has an anti-discrimination policy in effect and that it affirmatively encourages the participation of minorities in its hiring program.
- Requirement 2. When a contractor intends to subcontract out any work they shall seek out minority and women contractors for the subcontract work. The requirements to notify minority and women contractors of any bids can be satisfied by advertising in newspapers or trade journals that are of general circulation in the metropolitan Seattle area.
- Requirement 3. If and when a contractor hires new employees or contracts with subcontractors, the contractor must alert such employees and subcontractors to the contractor's commitment as an equal opportunity employer, etc. This requirement may be compiled with by posting a notice of equal opportunity commitment at the job shack, or by the time clock.
- Requirement 4. If and when a contractor promotes or advances employees, the contractor must consider all eligible employees.

## City Clerk's Office Electronic Document Management System Request for Proposal

The City of Bellevue reserves the right to audit all contractors for compliance with the requirements set forth in BCC 4.28.143.”

**APPENDIX D**

**AFFIDAVIT OF EQUAL OPPORTUNITY COMPLIANCE**

\_\_\_\_\_ certifies that:  
Bidder

1. If necessary to recruit additional employees, it has:
  - a. Notified relevant minority and women's organizations, or
  - b. Hired through a union hall with an anti-discrimination policy.
  
2. It intends to use the following listed trades in the work under the contract:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
3. In sourcing subcontract work for trades listed above, it has notified in writing appropriate minority and women contractors of bids for subcontract work.
  
4. It will obtain from its subcontractors and submit upon request, an Affidavit Equal Opportunity Compliance as required by these bid documents.
  
5. It has provided a written statement to all new employees or subcontractors indicating its commitment as an equal opportunity employer.
  
6. It has considered all eligible employees for promotion or advancement when promotion or advancement opportunities have existed.

By: \_\_\_\_\_  
(authorized signature)

Title: \_\_\_\_\_

Date: \_\_\_\_\_

**APPENDIX E**

**PUBLIC RECORDS DISCLOSURE**

“Under Washington state law, the documents (including but not limited to written, printed, graphic, electronic, photographic or voice mail materials and/or transcriptions, recordings or reproductions thereof) submitted in response to this request for proposals (the “documents”) become a public record upon submission to the City, subject to mandatory disclosure upon request by any person, unless the documents are exempted from public disclosure by a specific provision of law. If the City receives a request for inspection or copying of any such documents it will promptly notify the person submitting the documents to the City (by U.S. mail and by fax if the person has provided a fax number) and upon the written request of such person, received by the City within five days of the mailing of such notice, will postpone disclosure of the documents for a reasonable period of time as permitted by law to enable such person to seek a court order prohibiting or conditioning the release of the documents. The City assumes no contractual obligation to enforce any exemption.”

## **ATTACHMENT A**

# **ATTACHMENT A**

**City of Bellevue**

**City Clerk's Office**

**Electronic Document Management System (EDMS)**

**Application Design Document**

**SUBMITTED BY**

**CRE8<sup>®</sup>, INC.**

**CENTER FOR REALIZING EXCELLENCE**

**1420 FIFTH AVENUE**

**SUITE 2200**

**SEATTLE, WASHINGTON**

**206-521-2746 (VOICE) 425-562-1194 (FAX) [INFO@CRE8INC.COM](mailto:INFO@CRE8INC.COM) (INTERNET)**

## **NOTIFICATION AND DISCLAIMER**

1. The enclosed Application Design Document (i.e., sections and questions) and methods to collect information are copyright by CRE8, Inc. and have been authorized for the use of by the City of Bellevue EDMS project. Photocopying of the enclosed EDMS Application Design Document and integration of the document into an RFP is permitted by CRE8, Inc. for the enclosed City of Bellevue EDMS project only. Electronic distribution of the entire Application Design Document is permitted in PDF or TIFF format only. However, electronic distribution of the application design document questions is permitted in word processing format. Use of the Application Design Document in part or in whole to create any other document or publication (e.g., RFP, requirements document, or instructional materials) is not permitted without the written permission of CRE8, Inc.
2. The information regarding City of Bellevue EDMS project described in the enclosed Application Design Document has been provided to CRE8, Inc. by City of Bellevue. The responsibility for accuracy and completeness of information enclosed in this document is the responsibility of City of Bellevue, not CRE8, Inc.
3. CRE8, Inc. assumes no responsibility for use, implementation and results of the application design provided to the City of Bellevue for the EDMS project.
4. CRE8, Inc. is an independent consulting organization that specializes in paperless technology training, planning and process analysis/redesign. CRE8, Inc. provides only software, hardware, and implementation planning consulting services, and as such will not be bidding or subcontracting on the enclosed City Clerk's Office EDMS project.
5. Any vendor questions regarding the enclosed City Clerk's Office EDMS Application Design Document should be communicated directly to the City of Bellevue RFP Coordinator, not to CRE8, Inc.

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**SECTION 1 CITY OF BELLEVUE ENTERPRISE REQUIREMENTS**

*1.1 Introduction*

This section describes City of Bellevue enterprise requirements. While the objective of this RFP is to provide the City of Bellevue with an electronic document management system (EDMS) to store the City Clerk's Office documents, the selected system must be scalable to meet enterprise needs. The City hopes to expand the use the EDMS to other departments. If other products are selected for some departments, the EDMS should be able to integrate with those systems.

*1.2 City of Bellevue Enterprise Requirement Summary*

At the discretion of the City of Bellevue, the EDMS system purchased will need to be expanded or linked to other paperless systems to meet the enterprise requirements of the City of Bellevue including areas such as: Planning and Community Development, Parks and Community Services, Police, Fire, Utilities, Transportation, City Attorney, Finance, Information Technology, and Human Resources.

City Attorney EDMS Applications	Finance EDMS Applications	Fire EDMS Applications	HR EDMS Applications	IT EDMS Applications	Parks EDMS Applications	PCD EDMS Applications	Police EDMS Applications	Transportation EDMS Applications	Utilities EDMS Applications
City Clerk's Office EDMS Applications									
Electronic Document Repository									
Contracts Process									
Council Packet Process									

Figure 1. City of Bellevue Enterprise Project Matrix

The department EDMS systems are intended to manage department documents during their active life cycle. Once the active phase is complete, these documents are to be transitioned into the City Clerk's electronic document repository for storage, retention, and disposition.

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1.2.1 Enterprise Pages Required To Be Stored

The total number of pages stored by the City of Bellevue at 42,290,692 pages. This consists of an estimated 2,586,994 pages on the desktop, 13,419,004 pages in active file cabinets, and 26,284,694 pages in off-site archive. The City does not plan on performing backfile conversion of all of these pages. However it is presumed that over the course of the enterprise project, the EDMS system will need the capacity to store similar number of pages.

Table 1. City of Bellevue Enterprise Estimated Pages Matrix

<i>Dept</i>	<i>Pages on Desks</i>	<i>Pages in File Cabinets</i>	<i>Pages in Archive</i>	<i>Total Estimate</i>
City Attorney	247,000	1,256,250	933,300	2,436,550
City Clerk	26,000	148,000	1,366,000	1,540,000
Finance	304,686	2,582,022	3,259,200	6,145,908
Fire	48,195	1,401,980	733,175	2,183,350
HR	24,000	130,400	1,407,500	1,561,900
IT	265,134	51,375	26,400	342,909
Parks	539,946	1,410,800	134,400	2,085,146
PCD	133,466	132,668	5,104,006	5,370,140
Police	356,355	160,050	2,695,113	3,211,518
Transportation	384,750	3,828,300	5,196,800	9,409,850
Utilities	257,462	2,317,159	5,428,800	8,003,421
	<b>2,586,994</b>	<b>13,419,004</b>	<b>26,284,694</b>	<b>42,290,692</b>

In addition to the pages to be stored, City of Bellevue has nearly 300,000 electronic files residing on shared file servers. These files take up over 60 GB of space on the servers. A significant number of electronic files are also stored on local hard drives, but no estimate of the number and size of these files has been made.

1.2.2 Concurrent and Named Users

The number of City of Bellevue enterprise concurrent users is estimated at 313 and the number of City of Bellevue estimated named users are 1,329. Additional concurrent users within the city (view/print) could be 618, bringing concurrent logons to 931. However, this number contains redundancies so that the total number of concurrent users for the City will range between 313 and 931.

City Clerk's Office Application Design Document

Table 2. City of Bellevue Enterprise Estimated Concurrent/Named Users Matrix

<i>Dept</i>	<i>Concurrent Users By Group</i>	<i>Total Users by Group</i>	<i>Concurrent Users Outside of Group</i>	<i>Estimated Total Concurrent Users</i>
City Attorney	14	20	60	74
City Clerk	10	10	100	110
Finance	16	76	34	50
Fire	14	202	14	28
HR	11	12	180	191
IS	10	34	40	50
Parks	9	281	10	19
PCD	36	108	40	76
Police	63	267	22	85
Transportation	74	116	85	159
Utilities	56	203	33	89
<b>Total Estimate</b>	<b>313</b>	<b>1329</b>	<b>618</b>	<b>931</b>

1.2.3 Potential Applications

The following list shows the departments and functional areas that may benefit from an EDMS solution. The City plans on performing a detailed assessment of each department before beginning system selection and implementation activities.

- City Attorney - Advisory, Prosecution, Litigation, Administration
- Finance - Facilities Planning, Financial Planning, Risk Management, Financial Operations (Accounting, Payroll, Accounts Payable, Purchasing, Business and Occupation Tax, Business Licensing, Treasury)
- Fire - Administration, Suppression and EMS, Fire Prevention, Training, Emergency Preparedness
- Human Resources - Compensation, Staffing and Employee Relations, Labor Relations, Benefits
- Information Technology - Application Services, Client Technology Services, Network and System Support, Business Operations
- Parks and Community Services - Administration, Probation, Recreation, Resource Management, Facilities, Project Management, Human Services
- PCD - Land Use, Building, Planning, Administration
- Police - Records and Property Evidence, Investigations, Patrol, Community Service, Traffic, Communications, Administration and Timekeeping, Personnel Services
- Transportation - Business Systems, Traffic Management, Planning, Capital Projects
- Utilities - Business Administration, Customer Service, Utility Billing, Resource Management, Engineering, Maintenance and Operations

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#### 1.2.4 Enterprise Paperless Technology Requirements

City Enterprise paperless technology requirements are based upon the needs of departments/application listed above. These requirements include, but are not limited to the following.

- Input methods including scanning, fax, and upload (i.e., documents and metadata)
- Storage of objects including TIFF, PDF, HTML, XML, e-mail, Word, WordPerfect, Excel, PowerPoint, Project, AutoCad, SmallWorld, ASCII, VISIO, GIF, Publisher, voice, and video
- Indexing ranging from manual to automated (ICR/OCR), and from key word to full text
- Electronic folder management and electronic document management ranging from storage of images and native document formats to creation, versioning, and publishing
- Annotation ranging from sticky note, to direct annotation, to electronic signature verification
- Viewer requirements ranging from simple (e.g., standard documents) to complex (e.g., E-Size documents) and from thick client to thin client. Note: Thin client is preferred by the City.
- Search ranging from simple to complex, from key word to content
- Security options ranging from password protection to document encryption
- Workflow for City departments ranging from simple to complex. Examples of simple workflow may involve an approval process that would take advantage of e-mail routing, such as leave approval. Complex workflow may include integration with other systems, parallel paths, numerous steps, and conditional branches. Examples of complex workflow processes in the City includes PCD's permitting process and Transportation's capital projects process. Additional information regarding the number of steps in the workflow will be determined as each department undertakes an application requirements design.
- COLD for some areas of the City
- Output to printers, fax, and electronic (e-mail, download, etc.)

#### Introduction Questions

1. *Describe general ability to meet overall City Of Bellevue*
  - a) *Current EDMS project requirements (City Clerk's Office Documents);*
  - b) *Future EDMS project requirements (Council Packet Workflow, Contracting Workflow);*
  - c) *Future enterprise project requirements*
  - d) *Ability to store all post processing documents from all areas of the city,*
  - e) *Ability to meet the needs of other city requirements through expansion of system proposed or link to other paperless system, and*
  - f) *Ability to meet the needs of the City as a whole;*
  - g) *Describe briefly what is required to duplicate/expand system to other application areas listed.*

## **SECTION 2 CITY CLERK'S OFFICE EDMS APPLICATION**

### *2.1 City Clerk's Office EDMS Project Overview*

The objective of the enclosed Request For Proposal is to provide the City of Bellevue with an Electronic Folder Document Management System (EDMS) to allow the City of Bellevue City Clerk's Office to input, store, access, route, and retrieve documents.

In addition, in future phases of the EDMS include the ability to

- Route documents through a council packet authoring/versioning workflow process,
- Route documents through a contracting authoring/versioning workflow process,
- Store all post processing City Department documents in an Electronic Folder/Document management system, and
- Meet the needs of other City of Bellevue Departments through expansion of the EDMS or integration to other appropriate paperless systems.

For the current project, the number of City Clerk's pages to be scanned/indexed or uploaded/indexed is estimated at 750,550 over 5 years, 150,110 over 1 year, 12,509 per month, 3,127 per week, or 626 per day. Beyond 5 years pages stored could 1,540,000 pages or more.

Documents received can range from 1 to 3,000 pages each. The growth rate for documents received by the City Clerk's Office are estimated at 5% per year.

It is important to note that an estimated 199,120 City Clerk's Office pages will require backfile scanning which will need to occur during system installation . Additional backfile scanning may be required as permitted by time and budget.

To start, a low level scan/index workflow for receiving/filing of documents (see workflow section VI.3) will be required for this project. However, workflow requirements will increase with other city clerk's office projects (i.e. council packet and contracts) and other City of Bellevue projects.

Although the primary format of images scanned/uploaded to EDMS will be TIFF, other formats required to be uploaded to the EDMS can include: HTML, XML, e-mail, Word, WordPerfect, Excel, PowerPoint, ASCII, Visio, TIFF, PDF, GIF, Publisher, voice, and video. Electronic signatures, encryption and de-encryption of information may also be required for future projects.

Total users of the City Clerk's Office EDMS are estimated to be 10 with all of those concurrent. Over time the number of users may increase to between 60 and 70 with implementation of the Council Packet Process and then may increase by an additional 30 to 100 with the implementation of the Contracting Process.

Over time, enterprise-wide access of files in the City Clerk's Office by City employees/contractors could grow by an additional 100 to 200 concurrent users. In addition, public access will also increase the number of concurrent users on the system (number to be determined). It is however, important to note that direct public access to the EDMS may be limited by line speeds and disclosure restrictions.

## 2.2 EDMS Input Requirements

### 2.2.1 Scanning Requirements

The City Clerk's Office paper based documents received can range in size from 3 by 2 - to - 8 1/2 by 11 - to E-Size, with the majority of documents being 8 1/2 by 11. Documents can be both simplex and duplex. Weights of paper range from standard to lightweight. Documents can range from 1 to 3,000 each.

Day one clerk file volumes to be scanned/indexed are estimated at 70% of 150,110 pages received per year (750,550 pages/ 5 years) or 105,077 pages per year, 8,756 pages per month, or 437 pages per day. Documents received by the City Clerk's Office may grow an estimated 5% per year. See table below for a detailed list of City Clerk's Office folders/documents.

Table 3. City Clerk's Office Detailed Folder/Document Matrix

Folder/ Document	Volumes	Size	Storage Format	Year Volumes	Retention Period	5 Year Storage Volumes	Unique Workflow/ Conversion/ Other
Affidavits	85 x 3 pgs per year. Range from 1 to 5 pgs.	8½ by 11	Image	255	6 years	1,275	--
Agendas	48 x 5 pgs per year. Range from 1 to 8 pgs.	8½ x 11	Word	240	Permanent	1,200	--
Annexation	100 pgs	8½ x 11	Image	--	--	100	--
Appeals	10 x 2 pgs per year. Range from 1 to 4 pgs.	8½ x 14	Image	20	Permanent	100	--
Bids and Contracts	1,360 x 25 pgs. Range from 1 to 50 pgs.	8½ x 11 to 11 x 17	Image	34,000	6 years from closure of contract.	170,000	Workflow is not documented. Address workflow in future phase. 3 signatures required (e-signature)  64,000 pgs backfile est.

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Folder/ Document	Volumes	Size	Storage Format	Year Volumes	Retention Period	5 Year Storage Volumes	Unique Workflow/ Conversion/ Other
Bonds	1,000 pgs	8½ x 11	Image	--	Redemption + 6 years	1,000	--
Citizen Inquiry	5 pgs x 100 per year	--	--	500	2 Years	2,500	--
Claims For Damages.	100 per year x 5 pgs. Range from 1 to 50 pgs.	3 x 5 to 11 x 14.	Image	500	6 Years After Settlement	2,500	--
Community Councils	5000 pgs per year	--	--	5,000	10 years to permanent	25,000	--
Council Packets	48 x 100 pgs avg. Range from 70 pgs to 200 pgs.	8½ x 11	Image, Word, e- form (XML)	4,800	10 Years	24,000	Workflow, e-signatures, approval, versioning, authoring, collaboration
Council Requests	14 pgs x 36 per year	8½ x 11	Image, Word	504	2 Years	2,520	Routing. internal.
Deeds	15 x 2 pgs avg. Range from 1 to 3 pgs per year	8½ x 11 to 8½ x 14	--	30	Perm	150	Backfile convert from 1953. Estimate at 720 pgs.
Destruction Notices	6 binders x 3 in (300 pgs). 1,800 total	8½ x 11	Image	--	6 years after last item destroyed	1,800	--
Easements	100 x 4 pgs per year. Range from 1 to 5 pgs.	8½ x 11 to 11 x 17	--	400	Perm	2,000	Backfile convert from 1953. Estimate at 9,600 pgs.
Election Files	100 pgs per year. 1-2 pgs each.	8½ x 11, E- size, various sizes	Image	150	6 years	750	--
Hearing Examiner	420 per year x 200 pgs avg.  Range from 5 to 3,000 pgs	8½ x 11 to E-size	Image. Could be photo or video in future.	84,000	6 years from archival review	420,000	--
Interest Statements	60 pgs	--	Word	60	3 years	300	--
Legislative History	Access Database	Access Database	Data	Access Database	Permanent	Access Database	--

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Folder/ Document	Volumes	Size	Storage Format	Year Volumes	Retention Period	5 Year Storage Volumes	Unique Workflow/ Conversion/ Other
Local Improvement District Books	100 Pgs  3 books hardbound. and whole drawer of files. Range from 1 to 50 pgs.	8½ x 11	Image	--	Perm	100	--
Major Department Documents <i>Budget, Land Use, City Code, Comp Plan</i>	200 folders per year x 50 pgs. Range from 1 to 2,000 pgs. Indexed by department.	--	--	10,000	Permanent	50,000	--
Minutes	94 meetings x 12 pgs. Range from 1 to 25 pgs	--	Word.	1,128	Permanent	5,640	Need to be uploaded to new EDMS system
News Clippings	1 per week x 10 pgs	8½ x 11	Word	520	2 years	2600	Backfile convert from 1953. Estimate at 124,800 pgs.
Oath Of Office	500 pgs.	7½ x 9½ .	--	--	Term plus 6 years	500	--
Ordinances and Resolutions	69 ordinances x 5 pgs. 111 resolutions x 3 pgs. Range from 1 to 250 pgs.	Electronic	On CD- ROM from 1990. TIFF format and text format.  2 CDs For minutes. 2 CDs for ordinance s	345 333	Permanent	1,725 1,665	Need for CDs to be uploaded to new EDMS system
Petitions.	800 pgs.	8½ x 11 to 8½ x 14	--	--	6 years	800	--
Plat Maps	50 x 5 pgs for 5 years. Range from 1 to 10 pgs.	E-size	Image	250	Permanent	1,250	--
Policies and Procedures	4,000 to 6,000 per year	--	Word, HTML And Image	5,000	Permanent Until Superseded	25,000	--
Public Disclosure Requests	140 per year x 5 page avg. Range from 1 to 500 pgs.	4½ x 6 to 8½ x 11 to E-size.	Images or E-Form (XML)	700	6 years	3,500	Workflow Legal Review.
Public Hearing Notices	15 per year x 1 pg	8½ by 11	Image	15	6 years	75	--

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## City Clerk's Office Application Design Document

Folder/ Document	Volumes	Size	Storage Format	Year Volumes	Retention Period	5 Year Storage Volumes	Unique Workflow/ Conversion/ Other
Retention Schedules	3 binders x 500 pgs total.	8½ x 11	Image	--	Until superseded. Over 5 years.	1,500	--
Volunteer Files and Annual Volunteer Report	200 pgs per year	--	Word	200	6 years	1,000	--
Estimated Total Of Documents						750,550	199,120 pgs backfile conversion

Backfile conversion may be required for 199,120 pages during installation. Additional backfile scanning may occur as permitted by time and budget.

All documents will be received at City of Bellevue. However, for future project phases, documents may be scanned, faxed, or uploaded (if electronic) from outside/remote City of Bellevue locations. Hours of scanning operation are from 8:00 am to 5:00 p.m., weekdays.

### Scanning Questions

- 1) *Can scanning requirement be met by vendor (Yes/No)? Discuss.*
- 2) *Describe type of scanners proposed and specifications.*
- 3) *Discuss ability to produce microfilm with proposed scanners.*
- 4) *Describe scanning software and hardware capabilities, version number, date released, and number of users supported.*
- 5) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

## 2.2.2 Fax In Requirements

Day one forward volume of City Clerk's Office faxes received is estimated at 2% of 150,110 pages received per year or 3,002 pages per year, 250 per month, or 13 per day.

Documents received by fax will be uploaded directly to the EDMS system for image storage and indexing. The quality of faxes range from good to fair.

The current LAN/WAN supporting scanning requirements is TCP/IP. Hours of fax operation are 24 hours a day, 7 days a week.

### Fax In Questions

- 1) *Can fax requirement be met by vendor (Yes/No)? Discuss.*
- 2) *Discuss fax software and capabilities. Describe fax deskewing and image clean up capabilities.*
- 3) *Discuss fax software and hardware version number, date released, and number of users supported.*
- 4) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

## 2.2.3 Electronic Input Requirements

Day one forward electronic upload volumes is estimated at 28% of 150,110 pages received per year or 42,031 pages per year, 3,503 per month, or 175 per day.

Formats required to be uploaded to the EDMS may include: HTML, XML, e-mail, Word, WordPerfect, Excel, PowerPoint, ASCII, Visio, TIFF, PDF, GIF, Publisher, voice, and video. Index includes metadata. System should support document type definitions and document schemas.

Hours of electronic input will be 24 hours a day, 7 days a week.

### Electronic Input Questions

- 1) *Can electronic input requirements be met by vendor (Yes/No)?*
- 2) *Discuss ability to upload documents,*
- 3) *Describe ability to interface/upload from Forms Processing Software.*
- 4) *Does interface with a Forms Processing Software exist or will it need to be developed. Discuss.*
- 5) *Describe electronic in / storage software capabilities, version number, date released, and number of users supported.*
- 6) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

## 2.2.4 Compression and Format Requirements

The desired requirement for TIFF image compression is 200 (scan or image upload), Group 4, and Lossless. PDF as a storage format will also be considered. Documents uploaded (other than TIFF) may be stored in their native format (e.g. Word, Excel, XML, PowerPoint, HTML, etc.)

### Compression and Format Questions

- 1) *Can compression and file format requirement be met by vendor (Yes/No)? If applicable, state alternative strategies and benefits.*
- 2) *Describe compression hardware/software capabilities, version number, date released, and number of users supported.*
- 3) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

## 2.2.5 Backfile Conversion Requirement

Initial backfile is asked to be performed by the vendor. Backfile is estimated at 199,120 pages. Future backfile may be completed by City of Bellevue or with vendor assistance.

### Conversion Questions

- 1) *State backfile conversion methodology and approach.*
- 2) *Describe ability to convert older versions or different file formats in bulk (e.g., WordPerfect to Word).*
- 3) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

## 2.3 EDMS Indexing Requirements

The following indexes will need to be captured into the EDMS through manual indexing, recognition, or upload. These indexes will need to update not only the EDMS but also the FMIS (Financial System). It is important to note that the EDMS will also replace the current records tracking/disposition (data only) system Versatile. These indexes are preliminary and the City recognizes that additional analysis will need to be performed to define the final set of indexes.

With proper security, the EDMS requires the ability to insert, add, move and delete documents and the ability to change indexes, excluding unique image/document identifier. Indexes should also include the capability for automatic look-up values to ease input and validation.

City Clerk's Office Application Design Document

Table 4. Preliminary EDMS Indexes

EDMS INDEX RECORD LAYOUT						
Index Level <sup>1</sup>			Unique?	Index Fields 1 <sup>2</sup>	Length	Location
1	2	3				
Applicable for all documents						
✓			Y	EDMS System Number	Vendor Specific	EDMS
✓			N	Date Scanned/Uploaded	10	EDMS
✓			N	Time Scanned/Uploaded	8	EDMS
✓			N	Number Of Pages Scanned/Uploaded	5	EDMS
	✓		N	Document Code	4	EDMS
	✓		N	Document Type <sup>3</sup>	50	EDMS
	✓		N	Document Date	6	EDMS
	✓		N	Document Description	250	EDMS
	✓		N	Document Volume	3	EDMS
	✓		N	Document Page	3	EDMS
	✓		Y	Receiving Number	6	EDMS
Applicable for legislative documents						
		✓	N	Legislative History (Abstract)	15-250	EDMS
Applicable for contracts documents <sup>4,5</sup>						
	✓		N	Ordinance/Resolution Number	8	EDMS/FMIS
	✓		N	Vendor Name	75	EDMS/FMIS
	✓		N	Vendor Number	25	EDMS/FMIS
	✓		N	Account Number	25	EDMS/FMIS
	✓		N	Contract Original Amount	10	EDMS/FMIS
	✓		N	Contractor Name	75	EDMS/FMIS
	✓		N	Creation Date	75	EDMS/FMIS
	✓		N	Department	8	EDMS/FMIS
Applicable for all documents for records management purposes <sup>6,7</sup>						
		✓	N	Record Series	30	EDMS
		✓	N	Retention Period	3	EDMS
		✓	N	Subject Description	3	EDMS
		✓	N	Document Date	8	EDMS
		✓	N	Expiration Date	8	EDMS
		✓	N	Document Close Date	8	EDMS
		✓	N	Disposal Date	8	EDMS
		✓	N	Bid Number	8	EDMS
	✓		N	Essential Record	3	EDMS
	✓		N	Archival Status	25	EDMS
Applicable for all physical documents for records management purposes						
	✓		N	Physical File Number	10	EDMS
	✓		N	Physical File Location	25	EDMS

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EDMS INDEX RECORD LAYOUT						
Index Level <sup>1</sup>			Unique?	Index Fields 1 <sup>2</sup>	Length	Location
1	2	3				
	✓		N	Physical Box Number	10	EDMS
	✓		N	Physical Box Type	10	EDMS
	✓		N	Physical Box Location	25	EDMS

Notes:

- 1) Index levels indicated in the table below signify
  - Level 1 – Created in subsequent processing/analysis
  - Level 2 – Created at time initial input
  - Level 3 – Created at initial data entry
- 2) Except for date and time fields, all index fields are assumed to be alphanumeric.
- 3) City Clerk's Office document types for City Clerk's Office are defined in Table 3.
- 4) The emulation package for FMIS is Smart Term v.4.0 for Windows. Integration requirement options include: OLE, API, or front end VB screen to update both systems.
- 5) The City's Financial Management Information Systems (FMIS) was developed in house on a VAX-VMS platform primarily using PowerHouse programming language (with some COBOL). The system is hosted on Compaq Alpha hardware running with Open VMS. Interfaces to this systems can be accomplished using ASCII fixed files or using CONNX, a data access tool for accessing legacy and relational databases.
- 6) Versatile Enterprise is an off-the-shelf records management system, used to index and manage the City's active and inactive paper-based records. It is a 32-bit application running on a Borland Database Engine, compatible with SQL, Oracle and Sybase databases. Versatile currently manages approximately 11,000 boxes and 4,000 files.
- 7) Versatile is installed on approximately 30 individual Records Officers PC's, who use the system to input box/file information and to make records requests.

Indexing Questions

- 1) *Can index requirement be met by vendor (Yes/No), Explain.*
- 2) *Discuss ability to incorporate current document tracking/disposition system (Versatile) capabilities into EDMS or to integrate a third-party product.*
- 3) *Discuss abilities to receive indexes/documents form Shana Forms.*
- 4) *Discuss abilities to pass indexes from EDMS to FMIS*
- 5) *Describe any index limitations.*
- 6) *Describe number and length of indexes supported.*
- 7) *Discuss ability to modify and add indexes.*
- 8) *Describe index software capabilities, version number, date released, and number of users supported.*
- 9) *Discuss index database supported. List index input screen design tools, options, strategies, and languages supported.*
- 10) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

### 2.3.1 Manual Indexing Requirements

At this time the majority of indexing will be performed manually or through forms recognition.

#### Manual Indexing Questions

- 1) *Can manual index requirement be met by vendor (Yes/No)?*
- 2) *Describe number and length of manual indexes supported.*
- 3) *Discuss index software capabilities, version number, date released, and number of users supported.*
- 4) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

### 2.3.2 Bar Code Indexing Requirements

There are no requirements for bar code recognition at this time but could be in the future.

#### Bar Code Indexing Questions

- 1) *Can future barcode requirement be met by vendor (Yes/No)?*
- 2) *Discuss number and type of barcodes supported.*
- 3) *Describe barcode hardware/software capability, version number, date released, and number of users supported.*
- 4) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

### 2.3.3 OCR/ICR Forms Processing Indexing Requirements

OCR/ICR recognition will be required through use of Form Processing Recognition. Through this process, a standard paper intake form will be filled out, attached to documents to be scanned, and be recognized - or - an electronic form will be filled out on-line (e.g., Shana) and then uploaded to the document index, upon scanning of the paper.

Indexes to be recognized/filtered through forms processing may include: Document Code, Document Type, Document Date, Document Description, Document Volume, Document Page, Receiving Number, Legislative History (Abstract), Ordinance/Resolution Number, Vendor Name, Vendor Number, Account Number, Contract, Original Amount, Contractor Name, Creation Date, Department, Record Series, Retention Period, Subject Description, Document Date, Expiration Date, Document Close Date, Disposal Date, Bid Number, Physical File Number, Physical File Location, Physical Box Number, Physical Box Type, Physical Box Location, Table File, Record Series, Retention Period, Essential Record, and Archival Status.

OCR/ICR Forms Processing Indexing Questions

- 1) *Can OCR/ICR Forms Processing requirement be met by vendor (Yes/No)?*
- 2) *Discuss Forms Processing Software supported and level of integration.*
- 3) *Discuss Forms Processing Form Designer Tool and Capabilities.*
- 4) *Discuss Forms Processing Image Clean Up Capabilities.*
- 5) *Discuss Forms Processing OCR/ICR recognition capabilities.*
- 6) *Discuss Forms Processing Unattended editing functions.*
- 7) *Discuss Forms Processing Rules based recognition assistance.*
- 8) *Discuss ability of Forms Processing to produce an electronic form for intranet/internet usage.*
- 9) *Discuss ability to integrate with third party electronic forms (Shana).*
- 10) *Discuss ability of 1) information being filled out in the electronic form and 2) uploaded to the document index at time of scan.*
- 11) *Describe forms processing hardware/software capability, version number, date released, and number of users supported.*
- 12) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

2.3.4 Electronic Indexing Requirements

As discussed above, an electronic form will be filled out on-line (e.g., Shana) and then uploaded to the document index upon scanning of the paper.

Electronic Indexing Questions

- 1) *Can electronic indexing requirement be met by vendor (Yes/No)?*
- 2) *Discuss number and type of electronic indexing options supported.*
- 3) *Describe electronic indexing hardware/software capability, version number, date released, and number of users supported.*
- 4) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

2.4 Storage Requirements

Storage requirements for documents and related indexes range from 2 years to permanent/archival (See Retention Section II.6.D). Access to EDMS documents will be throughout the storage period. City of Bellevue is open to a discussion of magnetic and optical storage strategies.

Over five years the City Clerk's Office pages to be scanned/uploaded are estimated at 750,550. Document growth rate for clerk documents is estimated at 5% per year. Backfile conversion is estimated at 199,120 pages.

## City Clerk's Office Application Design Document

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The majority of documents (70%) will be scanned into the system as TIFF images, 2% will be received by fax and uploaded as TIFF images, and 28% will be uploaded as electronic documents in their native format or to be stored at TIFF/PDF. City of Bellevue is open to a discussion of image storage as TIFF or PDF or in the ability to transform TIFF to PDF, as needed.

Over time an increasing number of documents will be electronically uploaded. Formats required to be uploaded to the EDMS could include: HTML, XML, e-mail, Word, WordPerfect, Excel, PowerPoint, ASCII, VISIO, TIFF, PDF, GIF, Publisher, voice, and video.

Compression requirements for TIFF images stored on the EDMS are industry standard Group 4, and Lossless (See II.4.A.). DPI will range from 200 (direct scanning to EDMS) to 300 DPI (Future Forms Processing Upload).

Indexes to be stored in the EDMS will be 40+ per document, ranging in size from 1 to 256+ characters each (See Section II.3. for index requirements). Annotation may range from 0 to 10+ per document (See Section II.5.B.).

Printing requirements are estimated at 20 to 200 pages per day. Fax out is estimated at 5 to 40 pages per day. Electronic out is estimated at 20 to 3,000 pages per day.

Electronic signatures, encryption and de-encryption of information may also be required.

### Storage Questions

- 1) *Can storage requirement be met by vendor (Yes/No)?*
- 2) *Discuss a magnetic storage option for short and long term storage. Discuss performance (e.g., input, view, and print speed) capability and strategies.*
- 3) *Provide sizing estimates for current and long term City of Bellevue EDMS volumes.*
- 4) *Describe other storage options believed to be appropriate.*
- 5) *Describe strategy (automated) to move electronic documents between different media (e.g., magnetic to optical, and back). Discuss HSM strategy and tools.*
- 6) *Discuss backup and disaster recovery strategy/tools.*
- 7) *Discuss caching capabilities and strategies.*
- 8) *Describe partitioning capabilities and strategies.*
- 9) *Discuss replication capabilities and strategies.*
- 10) *Discuss load balancing strategies/tools.*
- 11) *Describe server strategies.*
- 12) *Discuss RAID capabilities and strategies.*
- 13) *Discuss mirroring capabilities and strategies.*
- 14) *For optical, describe jukebox storage options and strategy.*
- 15) *Discuss ability to download files to portable media or communication networks (e.g., CD, Internet).*
- 16) *Describe ability to render documents into alternative formats (e.g., PDF, HTML).*
- 17) *Describe storage hardware/software capabilities, version number, date released, and number of users supported.*

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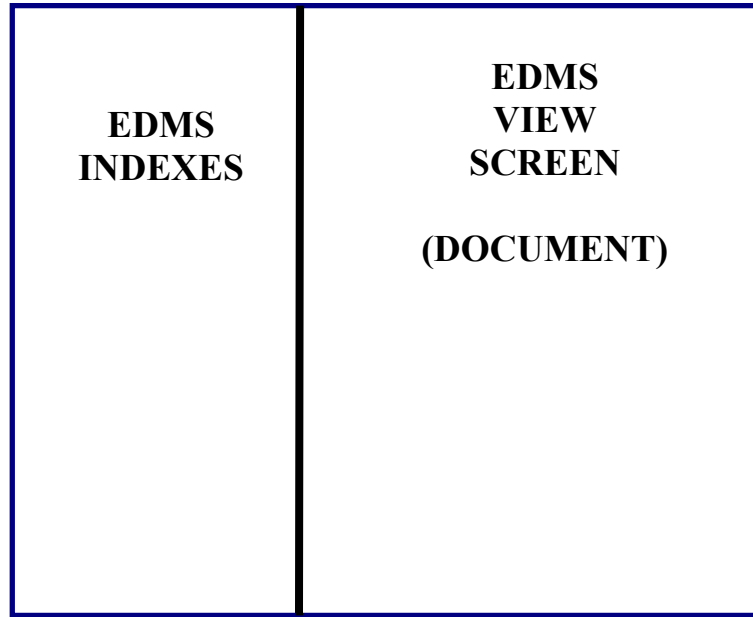
18) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

## 2.5 EDMS Viewing Requirements

### 2.5.1 Viewing Requirements

The primary viewing requirement is direct to the EDMS. As required this screen may need to be linked to other application such as the FMIS

#### EXAMPLE EDMS WINDOW LAYOUT



Total users of the EDMS are estimated to be 10 with all of those concurrent. Over time the number of users may increase 60 to a total of 70 with implementation of Council Packet Process Workflow and then may increase by 30 to a total of 100 with implementation of Contracting Workflow.

In addition, City enterprise wide access of files, in the City Clerk's Office, could grow by an additional 100 to 200 concurrent users. Public access will also increase concurrent users (number to be determined) to the system. However, it is important to note that public access may be dependent upon line speeds and disclosure restrictions.

Viewers must be able to scale, rotate, enhance, and annotate documents. In addition, full security of documents is required based upon items such as user name. Security requirements should include: scan/upload, view, annotate, print, and fax. Security should exist at folder, subfolder, and document level.

Other options such as Secure Server and Document Encryption may be required. Electronic signatures, encryption and de-encryption of information may also be required in the future.

### Viewing Questions

- 1) *Can viewer requirement be met by vendor (Yes/No)?*
- 2) *Describe ability to view required pages in a file, at the same time.*
- 3) *Discuss ability to integrate EDMS viewer to City of Bellevue Application Screens.*
- 4) *Describe integration tools/abilities (e.g., OLE, API).*
- 5) *Discuss ability to view the EDMS directly.*
- 6) *Describe viewing capabilities (e.g., pan, zoom, go to, next, zoom, rotate, page number).*
- 7) *Discuss ability to modify / customize user screens.*
- 8) *Discuss viewer (thick and thin) screen design tools, options, strategies, and languages supported.*
- 9) *Describe viewer (thick and thin) hardware/software capabilities, version number, date released, and number of users supported.*
- 10) *Describe ability to meet project security requirements. Can security be linked to other applications? Can security be linked to operating systems? Discuss.*
- 11) *Discuss Secure Server and Document Encryption options.*
- 12) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

### 2.5.2 Annotation Requirements

EDMS annotation requirements include: sticky note, direct markup on image (type, line arrows), and stamps. The average number of annotations per page may range from 0 to 10+. Annotation security is required for view, annotate, print, and fax. Annotation audit trail / log is desired (user, date, time of annotation). City of Bellevue also needs the ability to turn annotation view on and off.

### Annotation Questions

- 1) *Can annotation requirements be met by vendor (Yes/No)?*
- 2) *Discuss annotations supported from EDMS viewer.*
- 3) *Discuss annotations supported from EDMS thick client viewer.*
- 4) *Discuss annotations supported from EDMS thin client viewer.*
- 5) *Discuss annotation security.*
- 6) *Discuss electronic signature/code capabilities/integration.*
- 7) *Describe annotation hardware/software capabilities, version number, date released, and number of users supported.*
- 8) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

## 2.6 EDMS Foldering, Search, Workflow, and Retention Requirements

### 2.6.1 Foldering Requirements

Folder requirements are based upon folder indexes described in II.3. Subfolders may be required in the future.

#### Foldering Questions

- 1) *Can folder requirement be met by vendor (Yes/No)?*
- 2) *Describe how required folders will be set up, the time required to set up folders and the level of skill required.*
- 3) *Discuss any limits to the number of folders that can be established, modified, or deleted.*
- 4) *Describe types of objects that can be stored in folders and be viewed from folders.*
- 5) *Discuss database options supporting foldering.*
- 6) *Describe folder reporting capabilities (Inquiries and Reports) and (Audit Trail)*
- 7) *Discuss folder hardware/software version number, date released, and number of users supported.*
- 8) *Describe who developed foldering (EFM) product.*
- 9) *Discuss foldering (EFM) application integration options (DDE, OLE, API).*
- 10) *Discuss how foldering (EFM) integrates with other applications such as EDM, workflow, COLD, and e-mail.*
- 11) *Describe folder security options.*
- 12) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

### 2.6.2 Search Requirements

EDMS key word search must include the capability to search by:

- Any combination of key word characters within any key index (e.g., For date scanned (yyyy-mm-dd-1234), search across yyyy, search across yyyy-mm, search across mm and dd).
- Any combination of key indexes (e.g. Recording Number And Document Type ).

Indexes to be recognized/filtered may include: Document Code, Document Type, Document Date, Document Description, Document Volume, Document Page, Receiving Number, Legislative History (Abstract), Ordinance/Resolution Number, Vendor Name, Vendor Number, Account Number, Contract, Original Amount, Contractor Name, Creation Date, Department, Record Series, Retention Period, Subject Description, Document Date, Expiration Date, Document Close Date, Disposal Date, Bid Number, Physical File Number, Physical File Location, Physical Box Number, Physical Box Type, Physical Box Location, Table File, Record Series, Retention Period, Essential Record, and Archival Status.

All Search string requirements should include, but not be limited to: And, Or, Not, Except, All, Equals, Greater, Less Equal, Wild Card, and Boolean logic. Searches should be able to be on a

single filed, a range of fields or numerous fields. In addition, search requirements should include the ability to track status of documents in file (e.g., completed, missing) by key indexes.

The user will search through the EDMS directly. Search requirements should include the ability to track status of documents in file (e.g., completed, missing) by key indexes. In addition search profiles should be savable and reusable.

### Search Questions

- 1) *Can search requirements be met by vendor (Yes/No)? Discuss.*
- 2) *Discuss search screens (e.g. fixed, user defined).*
- 3) *Describe search capabilities, flexibility, options, and required training.*
- 4) *Discuss ability to save search parameters.*
- 5) *Describe search strings supported and required training.*
- 6) *Discuss advanced search capability (e.g., outside standard screens).*
- 7) *Discuss ability to modify and/or add search fields. Describe any limitations to search fields.*
- 8) *Discuss any limitations to search over the EDMS over Internet.*
- 9) *Describe search security options.*
- 10) *Discuss search hardware/software capabilities, version number, date released, and number of users supported.*
- 11) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

### 2.6.3 Workflow Requirements

Over time, additional areas of EDMS that will require workflow include the Council packet process and the Contracts process. Workflow steps could range from 50 to 500+ steps.

### Workflow Questions

- 1) *Describe ability to meet workflow requirements.*
- 2) *Discuss specific ability to meet future project workflow requirements.*
  - (a) *Routing indexes (e.g., workflow, EFMS).*
  - (b) *Routing options (e.g., sequential, parallel, and conditional).*
  - (c) *Routing priority (e.g., FIFO, priority).*
  - (d) *Automated task types (e.g., if-then-else, hold, suspend, launch, get from outside application, link, access, scan, upload, index, review, split, consolidate, print, fax, transmit, and custom task types).*
  - (e) *Complex decision task utilization (e.g., nested decision tasks, parallel routing).*
  - (f) *Decisions attributes (e.g., initiation (trigger), duration, notification, dependence, iteration, escalation, alerts, deadlines, and completion).*
  - (g) *Ability to trigger notification via email.*
  - (h) *Job assignments (e.g., group, individual).*
  - (i) *Ability to assign work (e.g., decision tasks, manually).*
  - (j) *Ability to reassign work to another job queue.*

- (k) *Flexibility in ways to order work queues (e.g. indexes).*
  - (l) *Workload rebalancing.*
  - (m) *Automated help (video, voice, text), at workflow design and utilization levels.*
  - (n) *Ability to link to outside applications (e.g., RIMS, e-mail).*
  - (o) *Graphical workflow designer tool (e.g., build of workflows, build of subworkflows, generation of workflow code, debugger, version controls, simulation modeling, route/export to BPR tools).*
  - (p) *Workflow measurement (e.g., graphics, reports) both inquiry and reports.*
  - (q) *Conformance to standards (e.g., WfMC, ODMA, DMA, ODBC, MAPI).*
  - (r) *Workflow patterns of 55 to over 110 stops per file.*
  - (s) *Security.*
  - (t) *Thin and thick client browser/viewer strategies.*
- 3) *Discuss briefly what is required to set up workflow, for a simple pattern versus a complex pattern. Discuss what level of effort/skill and tools are required to change/modify a workflow pattern and related indexes.*
  - 4) *Discuss workflow hardware/software capabilities, version number, date released, and number of users supported.*
  - 5) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

#### 2.6.4 Retention Requirements

Document retention period range from two years to permanent/archival. Retention/disposition indexes include: Record Series, Retention Period, Subject Description, Document Date, Expiration Date, Document Close Date, Disposal Date, Bid Number, Physical File Number, Physical File Location, Physical Box Number, Physical Box Type, Physical Box Location, Table File, Record Series, Retention Period, Essential Record, and Archival Status.

##### Retention Questions

- 1) *Can retention/disposition (deletion) requirements be met by vendor (Yes/No)? How?*
- 2) *Describe how retention/disposition will occur for folders/documents.*
- 3) *Discuss how retention/disposition capabilities will be built or integrated into the EDMS.*
- 4) *Discuss disposition scheduling and strategies for those documents stored on magnetic, CD, CD-R, CD-RW, magnetic-optical, and optical.*
- 5) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

#### 2.7 Microfilm Requirements

City of Bellevue documents will be microfilmed as required to support archival requirements.

##### Microfilm Questions

- 1) *Discuss possibility of recommended scanner supporting filming at the time of scan.*

- 2) *Discuss possibility of outputting film from the EDMS.*
- 3) *Discuss other methods of producing required microfilm.*
- 4) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

## 2.8 EDMS Output Requirements

### 2.8.1 Printing Requirements

Printing requirements are estimated at 20 to 3,000+ pages per day. Documents will be printed on the City of Bellevue LAN but in the future will be required to be printed anywhere over the City of Bellevue LAN/WAN/ Intranet, or over the Internet.

#### Printing Questions

- 1) *Can printing requirement be met by vendor (Yes/No)?*
- 2) *Discuss type of printer and specifications.*
- 3) *Discuss ability to transmit and print over LAN, WAN, and Internet.*
- 4) *Describe printer software and hardware version number, date released, and number of users supported*
- 5) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

### 2.8.2 Fax Out Requirements

Fax out is estimated at 5 to 40 pages per day.

#### Fax Out Questions

- 1) *Can fax requirement be met by vendor (Yes/No)?*
- 2) *Describe type of fax hardware supported and specifications.*
- 3) *Discuss fax software and hardware version number, date released, and number of users supported*
- 4) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*

### 2.8.3 Electronic Out Requirements

Electronic out is estimated at 20 to 5,000 pages per day. Electronic out is defined as direct transmission of documents in stored formats (e.g. Word, Excel, TIFF, Voice, Video), converted formats (e.g. HTML, XML, PDF) over a point to point, intranet, internet connection, or to CD-ROM, and may include metadata. *In the future documents may need be transmitted over a secure server environment with document encryption.*

Electronic Out Questions

- 1) *Can electronic out requirement be met by vendor (Yes/No)?*
- 2) *Discuss electronic out strategies (i.e., CD-ROM, Internet, Intranet).*
- 3) *Discuss ability to transmit TIFF files, and convert to TIFF to PDF.*
- 4) *Discuss encryption and secure server strategies.*
- 5) *Describe type of electronic out hardware supported and specifications.*
- 6) *Show detailed purchase software, hardware, training, conversion and consulting costs and maintenance of recommended solution in Section 5, Cost Proposal.*