

**Attachment B
PROJECT REQUIREMENTS**

Bidder attests that the questions contained in this document are factual and true.

Bidder Signature

Date

Bidder Name and Title

Bidder's Company Name

FUNCTION REQUIREMENTS SECTION

For Bidder self-assessment, the scoring range is from zero to three and defined as follows:

Self- Assessment Scoring Range	
Score	Description
0	Bidder has minimal or no experience
1	Bidder has an average level of experience
2	Bidder has a strong level of experience
3	Bidder has expert level experience

Bidder shall self-assess its experience level for each requirement in the Function Requirements Table below.

FUNCTION REQUIREMENTS TABLE (MANDATORY SCORED)

Functional requirements	Validate software functions required	Bidder Self-Assessment Score
Input requirements		
Electronic	Configure, test and deploy the enterprise content management (ECM) software to receive information from other electronic sources or systems. For the pilot, network shared drives are the primary electronic source.	

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Functional requirements	Validate software functions required	Bidder Self-Assessment Score
Scan paper records	Define, configure, test, and deploy a process for scanning paper documents. Minimize data entry when indexing through intelligent design of the folder taxonomy.	
Duplicate records	Create a reporting mechanism to identify suspected duplicates (used for both paper images and electronic files). Create a query filter to identify those records that may need manual intervention.	
Email	Configure to allow storing select individual emails in native email format within ECM repository. (Migration of vaulted email stores via Symantec Enterprise Vault is out of scope for this project.)	
Migration of electronic documents	Configure Object Importer to allow migration of electronic documents in native file format from shared network drives or SharePoint (using e-doc to sync SharePoint with ECM).	
File Formats	Configure product to handle all file types defined by OpenText ECM software.	
Redaction	Configure to have the ability to perform redaction of existing and incoming documents using BRAVA	
Indexing requirements		
Index (metadata)	Allow defining indexes and taxonomy for all documents and records.	
Auto indexing	Allow configuration for auto indexing of documents and records.	
Transaction storage requirements		
Record History	Configure metadata for indexing, routing, search and associated content stored in ECM.	
Audit trail	Configure software to capture all actions on records – access, edit, save, etc.	

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Functional requirements	Validate software functions required	Bidder Self-Assessment Score
Viewer requirements		
View and collaborate on any file type	Configure BRAVA to view all file types as supported in OpenText software.	
Adobe & MS Office Suite	Configure to allow the viewer to open these document types in the appropriate application.	
Redaction tools	Configure to allow users to redact information on documents and images.	
Annotation	Configure to allow mark-up of document images, including but not limited to: <ul style="list-style-type: none"> • Sticky notes • Stamps • Face annotations 	
Search requirements		
Search method	Configure to allow searching of documents and files in the ECM repository based on access permissions and to search for key words within the text of a document.	
Metadata search	Configure to have ability to search and filter by metadata	
Search criteria	Configure to allow searching by metadata indexing	
Search results	Configure to allow folder structure for viewing content	
Workflow requirements		
Workflow process	Define, create and test simple or multiple step workflows with multiple, sometimes complex, routing rules, decision points, and approval steps. Pilot activities to include creating up to four workflows.	
Email alerts	Configure to allow notifications and alerts to be sent to email.	

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Functional requirements	Validate software functions required	Bidder Self-Assessment Score
Retention requirements		
Retention requirements	Configure to allow retention requirements based on retention schedules.	
Retention rules	Configure to apply retention rules and disposition to records based on OFM and the state general retention schedules. State General Retention Schedule: https://www.sos.wa.gov/assets/archives/RecordsManagement/State-Government-General-Records-Retention-Schedule-v.6.0-(June-2016).pdf OFM Unique Retention Schedule: https://www.sos.wa.gov/assets/archives/RecordsManagement/office-of-financial-management-records-retention-schedule-v.1.4-(december-2017).pdf	
Record/Document Hold (Suspension of disposition)	Configure to have the ability to place identified records and related metadata on hold (for legal or business reasons), thus suspending disposition actions defined by retention requirements.	
Output requirements		
Print Requirements	Configure to allow print capability to network printers.	
Copy of data	Allow for data or data results from searches to be copied to external media.	
Exporting records	Configure to allow export of records, in native format, for regular business needs.	
Exporting records on hold	Configure to allow export of records, in native format and with accompanying metadata, for administrative purposes (legal, audit, program or other business need).	
Exporting vital records	Configure to allow export of vital (essential) business records, in native format, for continuity of operations planning	
Exporting permanent archival records	Configure to allow export of permanent archival records, in native format and with accompanying metadata, for transmission to Washington State Archives.	

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Functional requirements	Validate software functions required	Bidder Self-Assessment Score
Reporting requirements		
Record history	Ability to view the history of actions taken on records.	
Document usage reports	Allow creating reports about which documents and document types are being used.	
Customized reports	Configure the ability to create and save customized reports based on document properties and/or metadata fields/elements.	
Permissions		
Authorized users	Configure authorized users to have the ability to view, create, edit, delete and/or transfer records.	
Unauthorized users	Configure, as needed, to prevent unauthorized access, modification, deletion and/or transfer of records.	
Identity management	Configure to allow administration of user access rights.	
Document management	Configure to apply security rules at the folder level.	
Audit requirements		
Auditing document events or other records and images	Configure to capture or record basic audit events of changes made to documents (date, change made, by whom).	
Audit reports	Configure to allow administrators to run and produce report on audit data.	
Version Control		
Version Control	Configure system to provide version management and control (# versions kept, etc.) system wide, or by document type, location, permissions, etc. Allow for older versions of the same document to be manually deleted.	

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Functional requirements	Validate software functions required	Bidder Self-Assessment Score
Disposition		
Disposition	Configure records management controls and disposition actions to allow for records deletion or transmission of permanent archival records, in native format and with associated metadata, to Washington State Archives.	
General System		
Scalable	Configure to allow scaling up if more users or data resources are added.	
Content Intelligence		
Dashboards	Configure Content Suite data and Content Intelligence to allow for the use of dashboards and reports.	
Pilot Dashboards	Develop two default dashboards for use by pilot groups.	

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BIDDER IMPLEMENTATION DESCRIPTION SECTION

During the evaluation, evaluators will score this section based on the Scoring Matrix below using the consensus method. Evaluation scores will be assigned based on the effectiveness of the Bidders response to each description. A range of zero to three will be used and defined as follows:

Scoring Matrix		
Score	Description	Discussion
0	Discussion Omitted – No Value	The Bidder has omitted any discussion of this ECM item or the information provided is of no value.
1	Poor – Ability was not established and Approach marginal	The Bidder has not fully responded to the information requested for this ECM item, has a marginal ability to provide the requested services, or has simply restated ECM language.
2	Average - Solution & Detail are competitive	The Bidder has an acceptable capability to meet this ECM item and has responded in sufficient detail to be considered competitive.
3	Good - Strong and Competitive	The Bidder has demonstrated strong and competitive capability or approach and has provided a complete description of the requested capability, approach or experience.
4	Excellent - Solution & Detail are superior and competitive	The Bidder meets the qualifications of “Good” described above and has provided either an innovative approach or established through the proposal material far superior capability in this area.

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Bidder shall describe its experience, methodology, or any other pertinent information to each item in the table below.

BIDDER IMPLEMENTATION DESCRIPTION TABLE (MANDATORY SCORED)

No.	Description (Mandatory Scored)	Bidder Response	For Evaluation Purposes <i>Do not fill in</i>
1	Describe previous experience implementing OpenText products and number of years. Name specific components and describe complexity of implementation.		
2	Has your firm or resources implemented Content Suite Version 16? Describe project and who it was for.		
3	Describe your experience implementing BRAVA functionality.		
4	Describe your experience implementing Content Intelligence.		
5	Describe problems you've encountering using Object Importer.		
6	Describe the various ways to install Enterprise Scan. What part of this installation is the most complex?		
7	Describe the design of the infrastructure for an on premise implementation. (Number of servers, environments, layers, etc.)		
8	Describe your methods for performing data migration of network file shares.		
9	Describe how you gather information to understand a customer's retention schedules to manage records.		

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No.	Description (Mandatory Scored)	Bidder Response	For Evaluation Purposes <i>Do not fill in</i>
10	Describe several scripts you've created to enable integration or automation.		
11	Describe your method for defining complex workflows.		
12	Describe how you manage multiple user groups in order to keep consistency throughout the product implementation.		
13	Describe what type of knowledge transfer you provide for the system administrator.		
14	Describe how you teach users (hands-on) to perform configurations, creating automated scripts, build workflows, etc., using OpenText tools.		
15	Describe your strategy to link OFM's business requirements via workshops, meetings, or other to the configuration specifications of the software.		