

**Request for Proposals**  
**Electronic Document Management System**  
**March 31, 2017**

The Timberlane Regional School District (TRSD) will receive sealed bids for providing a robust and secure document management system. **All Bids must be received in the Office of the Superintendent, 30 Greenough Road, Plaistow, NH 03865, no later than 1:00 PM, April 20<sup>th</sup>, 2017.** Bids will be publicly opened and read at that time. Bid specifications may be accessed on TRSD web page <http://www.timberlane.net/rfp/> or by contacting the Technology Department at (603) 382-6119, ext. 2219.

**About**

The intent of this proposal is to solicit bids for a robust and scalable Electronic Document Management system capable of supporting a minimum of 10 concurrent users with basic workflow functionalities (approvals, rejections, inboxes, etc.). The system must meet the requirements and features listed below. While TRSD is issuing this RFP, the system will serve both TRSD and the Hampstead School district which is a part of the same SAU (School Administrative Unit). The combined districts serve approximately 4,500 students. This system will service the Special Education departments in both districts as well as the shared SAU Human Resources and Business Services departments.

**Instructions**

All bids must be sealed in plainly marked envelopes, with both the names of the company submitting the bid and the phrase **“Bid Proposal – TRSD Document Management System”** on the outside of the envelope. All bids are to be typewritten.

The bidder shall submit a statement with the bid, indicating school district experience with the names of school districts previously and/or currently served, the dates involved and the scope of the services performed and three (3) references. The bidder then may be called to present its solution to the district and answer any questions in person.

Proposals may be held by the Superintendent for a period not to exceed thirty (30) days from the date of the opening of the proposals for the purpose of investigating the qualifications of the bidder prior to the awarding of the contract.

The Superintendent may make investigation, as they deem necessary to determine the ability of the Bidder to perform the work. The Bidder shall furnish to the Superintendent all such information and data for this purpose as the Superintendent may request. The Superintendent reserves the right to accept or reject any and all bids or any item(s) thereof, and to waive any informalities in the bid process and to cancel in part or in its entirety the request for bid and to award the contract as the Superintendent deems to be in the best interests of the School District. TRSD further reserves the right to select the bid that best meets the District’s needs as determined by the Superintendent, in its sole discretion. While price will be a substantial factor in the District’s decision, the District reserves the right to select a vendor without the lowest cost proposal.

Any deviation from the conditions and specifications must be clearly expressed by each Bidder in the appropriate space on the bid forms. Unless so stated by the Bidder and accepted by the District, all conditions and specifications apply.

Any fraudulent or inaccurate statements or willful concealment of relevant information by the Bidder are grounds for rejection of that bid and for the termination of any subsequent contract there from.

Bidders may not withdraw bids for thirty (30) days after bid opening.

The successful Bidder, hereinafter referred to as the contractor, shall be prepared to enter into a written contract with TRSD within Thirty (30) days of written acceptance of the bid by the District.

### **Installation Engagement**

It is critical that the solution partner outline the process of completion specifically including all deliverables. Milestone progress must be defined including:

- EDM product is installed and working to scope
- All product configuration or customization has been completed, tested and working per scope, if applicable.
- All capture or 3rd party products are installed, tested and working to scope
- Solution including all proposed products and services have gone through User Acceptance Testing (UAT)
- Education including all end user and administration is completed.
- System documentation is completed and delivered.

### **Project Timeline**

Solutions partner must provide a comprehensive project plan for this engagement. The project timeline should minimize wasted effort and disruption of our daily activities while maximizing utilization of the time onsite. We solutions partner must fully appreciate the value of time, and strive to be as unobtrusive and flexible as possible.

### **Training**

The solutions partner must clearly specify the amount of onsite training time included in the proposed solution and the methodology to be used. Optional methodologies including both group training exercises and train the trainer sessions will be considered. The solutions partner should include both end user and administrative training requirements.

The solutions partner will be expected to develop a training guide as a required deliverable for this project.

### **Pricing**

Pricing should be detailed by the product or service being provided. Any optional components or custom development requirements should be fully detailed for further consideration. If a product feature is not available, the cost for third party product or customization must be listed in the Additional Cost section.

**The following is a list of minimum features required:**

- The solution must provide no less than 200 GB of available storage space.
- The solution shall be web based and not require solution specific software or plug-ins for online accessing workstations.
- End-user training must be on-site for a minimum of two (2) days.
- Vendor must provide minimum of five (5) current school district customers as references.
- Vendor must show at least ten (10) years of selling and supporting the recommended product.
- Data Center must have Multiple Availability Zones through Multiple Regions with Automatic Fail-Over without Interruption.
- Vendor must provide Non-Appropriation of Funds Cancellation.
- The solution should support digital signatures.
- The solution must support annotation and redaction.
- The solution must have the ability to audit date, time, user name, action and detail.
- The solution shall utilize a role based system that defines a role within the work task or activity and then assigns as many users as necessary.
- The solution must be able to associate form templates with user supplied data.
- The solution shall support various image formats such as .jpg, .tif, .bmp, and .png.
- The solution must support batch scanning, duplex scanning, and quality assurance of scanned images.
- The solution must support various methods for manual and automated indexing.
- The solution should support retrieval via Boolean, metadata and other search methods.
- The solution must support multiple document viewing, zooming, and image rotation.
- The system must allow security application at the document or file level. Security shall provide segregation of data amongst users and have the capability to segregate system functionality by user. Security must include read, update, annotation, highlighting, “mark-up,” and creation control.

- The solution must be capable of using Secure Socket Layer encryption for archival and retrieval of documents via the Internet.
- The solution must provide version control. Version control must automatically update the version number whenever a previously “checked-out” document is returned to the information repository and prevent more than one person from checking documents out for modification.
- The solution must allow a user to route a document, section, file, or memo to another user.

