

HOUSING AUTHORITY OF THE CITY OF MILWAUKEE
Antonio M. Perez, Secretary-Executive Director

**OFFICIAL NOTICE NUMBER 57730
REQUEST FOR PROPOSAL
Document Imaging and Management System**

**ADDENDUM #2
March 31, 2016**

THIS ADDENDUM TO THE SPECIFICATIONS IS ISSUED TO MODIFY, CLARIFY OR CORRECT THE ORIGINAL DOCUMENTS AND IS HEREBY MADE A PART OF SAID DOCUMENTS.

CHANGE: Submission Deadline to Wednesday, April 20, 2016 by 2:00 P.M. (CDT)

NOTE: There was a high volume of questions submitted. I will post the rest of the questions by the end of today. No other questions may be submitted.

QUESTION: Does HACM have an inventory on the total number of documents and classifications of documents that they expect to archive?

ANSWER: No

QUESTION: Would HACM look to have the vendor assist with the scanning of current back-file documents, or create imports from current file shares? - If yes, are there any details surrounding those activities as far as volume/size.

ANSWER: No

QUESTION: Is HACM looking for a paperless Section 8 Tenant File and paperless Recertification process?

- If so are certifications/re-certifications done on-sight (at HACM) or off-sight?
- If certifications/re-certifications are done on-sight how many staff perform them?

ANSWER: No

QUESTION: If the vendor has a paperless certification/re-certification solution, should the vendor propose this solution now or as a later phase?

ANSWER: N/A

QUESTION: If the vendor has a paperless work order solution for property maintenance, should the vendor propose this now or as a later phase?

ANSWER: N/A

QUESTION: If the vendor has a paperless HQS inspection solution, should the vendor propose this now or as a later phase?

ANSWER: N/A

QUESTION: If the vendor has a paperless Board Agenda Management solution, should the vendor propose this now or as a later phase?

ANSWER: We have a solution in place for this already.

QUESTION: If the vendor has a paperless Accounts Payable solution, should the vendor propose this now or as a later phase?

ANSWER: N/A

QUESTION: The RFP identifies a number of applications that they wish to integrate to - would HACM be willing to share their vision and application screenshots of where they would like to integrate?

ANSWER: The Microsoft Office Suite. The Other Applications have their own internal DMS.

QUESTION: During a demonstration/interview would it be possible to gain access to these systems to provide a full integration demonstration?

ANSWER: Yes

QUESTION: Could you identify the versions of Outlook/Office currently in use - Are there plans to migrate these over the next 6-12 months?

ANSWER: Microsoft Outlook 2010 and Microsoft Office 2010. Also, looking at either Microsoft Office 2013 or Microsoft Office 2016

QUESTION: The RFP states a number of workflow processes - has HACM identified any specific departments or areas where they would like to start in the workflow? - How many users would be workflow users? - Are there process flows available?

ANSWER: At this time we do not need any work flow processes.

QUESTION: If the product supports all of the Mobile platforms, would HACM be looking to roll out all of them in the initial implementation?

ANSWER: No, mobile platforms can come at completion of the project.

QUESTION: Can the agency provide a number of templates/document types and annual volumes:

- That are envisioned for a zonal OCR solution
- That are envisioned for a zonal OCR/ICR solution

ANSWER: We create mostly Word Docs and Excel Files. We have no idea on the volume.

QUESTION: Can the agency provide a number of fields to be extracted using zonal OCR/ICR for each template?

ANSWER: OCR is not something we are looking at this time.

QUESTION: Are there examples of the expected forms/documents available?

ANSWER: No

QUESTION: Workflow mentions a calculation of fees - can you identify the process expected there?

ANSWER: We will not be using Workflow at this time.

QUESTION: What type of training for both admin and end-users would HACM prefer (train-the-trainer, vendor provides all training, web based training, etc.)

ANSWER: Vendor Training, Train the Trainer.

QUESTION: How is the agency currently using SharePoint?

ANSWER: SharePoint not currently being used in production as of yet. We are experimenting with it.

QUESTION: What department(s) do you anticipate starting with for the project, as you indicate in Section 7 Item E that you will add additional departments after initial investment? Finance, HR, Procurement, Section 8, LIPH, Legal etc.

ANSWER: Section 8, Housing Management and Modernization and Development.

QUESTION: Will the system be accessed in multiple buildings, or just in the authorities administration offices?

ANSWER: Multiple Buildings, different sections and departments.

QUESTION: How many “concurrent users” do you anticipate accessing the system at the same time in the initial implementation?

ANSWER: Initially, about 50

QUESTION: Will capture/scanning processes be by department or in a central location and how many personnel will need capture/scanning license?

ANSWER: Each user that is scanning will have their own Desktop Scanner. ScanSnap IX500 or use a central MFP such as Xerox and Canon MFP's

QUESTION: Are you able at this time to estimate the number of Workflows needed for the initial implementation and then per department?

ANSWER: We do not require Workflow at this time but wanted it part of the scope for future needs if we decide to use it.

QUESTION: Number of “concurrent users” that will participate in workflows for the initial implementation and then per department?

ANSWER: We do not require Workflow at this time but wanted it part of the scope for future needs if we decide to use it.

QUESTION: Users Licenses. As noted in HACM RFP Addendum #1, initially 100 users will be accessing the system. Will HACM please provide clarity to the type of users (named/dedicated, or concurrent/shared) that should be considered for preliminary Total Project Cost pricing? Additionally, how many of these users will participate in workflow processing for approvals/reviews? Alternatively, should pricing simply be provided ala-carte at this time for volumes of one (1) each for HACM consideration?

ANSWER: We are not requiring any workflow at this time. We just want the software to have this capability should we decide this in the future. The type of license would be regular and concurrent. Yes, ala-carte pricing is fine.

QUESTION: Software Licenses. As most of the Functional Requirements identified in RFP Section #6 are functional capabilities rather than business process requirements, and as software platform pricing is modular in nature based on these capabilities, will HACM please clarify whether software pricing in the RFP response should be provided ala-carte for every functional capability referenced regardless of

business process requirement? Additionally, can HACM please confirm that these software capabilities will be validated with the selected vendor prior to any contracting or procurement process?

ANSWER: Yes, please provide the ala-carte pricing. We will also want to request demos prior to any procurement process.

QUESTION: Implementation Services. As implementation services pricing varies considerably based on project scope and workflow processes complexity, will HACM please provide further clarification to the following anticipated items:

- a. Number of document types? **Standard documents, Word, Excel, PDF, Cad, Power Point, anything we document and store would be uses in the Document Management System.**
- b. Types of documents & fields required for OCR extraction? **We do not require OCR extraction at this time, but wanted part of the scope for future if we decide to use it.**
- c. Automated workflow processing requirements for approvals, reviews & routings (i.e. renewal notifications) including sample process flow summaries/diagrams? **We do not require Workflow at this time, but wanted part of the scope for future, if we decide to use it.**
- d. Reporting requirements? **No special reporting processes required at this time.**

ANSWER: (a.) Standard documents, Word, Excel, PDF, Cad, Power Point, anything we document and store would be uses in this Document Management System. (b.) We do not require OCR extraction at this time but wanted part of the scope for future if we decide to use it. (c.) We do not require Workflow at this time but wanted part of the scope for future if we decide to use it. (d.) No special reporting processes required at this time.

QUESTION: What is the quantity of users and are any of them read-only?

ANSWER: 200 total

QUESTION: Do you currently have a content management and imaging solution in place and if so what is it?

ANSWER: Visual Homes, Account Mate and Multiview. Each have their own internal storage of attachments

QUESTION: Is there a requirement to integrate with a current system?

ANSWER: Importing of documents from Visual Homes and Account Mate. We cannot do Multiview as they store their documents within the Oracle Database itself and not on a separate file share like Visual Homes and Account Mate do.

QUESTION: Are you opposed to adopting a new content management systems?

ANSWER: For the rest of the Word and Excel Documents no.

QUESTION: Should the proposed solution be hosted or on-prem?

ANSWER: Prefer on premise as the data is sensitive in nature.

QUESTION: Can you estimate the number of unique workflows you anticipate?

ANSWER: No Workflow requirements at this time.

QUESTION: Can you estimate the quantity of forms and the quantity of templates?

ANSWER: No Forms at this time.

QUESTION: Can you estimate the volume of data per month?

ANSWER: We do not have a figure on this.

QUESTION: The RFP states that MBE/DBE percent is 20% and 18%. Are these cumulative (i.e. 38%)?

ANSWER: No, since this is a Federal funded purchase, the goal is 20%

QUESTION: The RFP states that the MBE/DBE firms must be certified. We could not find the names of the acceptable certification entities?

ANSWER: You may access State of WI MBE/WBB Certified firms at <https://wisdp.wi.gov/search.aspx>

QUESTION: Can HACM provide names and contact information for certified MBE/DBE firms?

ANSWER: You may access State of WI MBE/WBE Certified firms at <https://wisdp.wi.gov/search.aspx>

QUESTION: Please provide information about the users that will be working with the system. Specifically how many named users does HACM employ that will be leveraging the solution? Of that user community how many people does HACM expect to have working within the solution concurrently? Are there other user communities that will have access (constituents, for example)?

ANSWER: We have a lot of clerical staff and other admin staff spread between 22 different locations. Typically those users will be creating Word Documents. Approximately 100 users in our starting phase. Concurrently figure about 50-75. No outside access for other communities.

QUESTION: Will HACM be procuring scanners under this contract? If so how many scanners will be needed by HACM to meet the functional requirements of the business? If possible, please break that number down into at least two functional categories including "Point of Service" and "Mail Room".

ANSWER: No.

QUESTION: Does HACM utilize an existing enterprise fax service? i.e. does the proposed solution need to import content provided by a fax service or does it need to provide its own fax receiving solution including hardware?

ANSWER: HACM does not need this capability.

QUESTION: Please provide details about the deployed MFP community (vendor, model, etc.) that HACM wants the proposed solution to integrate with. Does this integration need to be an on-device solution or can the integration requirement be met by an import process?

ANSWER: Canon MFP, Model IR2525, Xerox MFP, Model WorkCentre 4150, Xerox MFP, Model WorkCentre 5335. The Integration can be met by the import process.

QUESTION: Please describe HACM's vision for this requirement. Is a native SharePoint plugin that physically drives a local scanner required?

ANSWER: This is not required at this time.

QUESTION: Please provide information about the expected volume of content that will be captured annually? Ideally this will include: page/file count, current storage size (for migrations), expected file types (for migrations or import processes), what percentage of this content needs to be processed by an OCR/OMR/IMR/etc solution, etc.

ANSWER: We do not have any of this information.

QUESTION: Please describe your use case for a self-contained / runtime version of a client.

ANSWER: We do not require this at this time.

QUESTION: Can HACM please confirm if any existing data will need to be migrated from a legacy system? If so please provide details of the legacy system and what data elements will need to be migrated.

ANSWER: We would like existing Microsoft Office Documents and PDF attachments to be imported.

QUESTION: Vendor assumes that their standard quote document along with a statement of work to match the quote will be acceptable, please confirm. Vendor also assumes that these documents should be submitted in a separate sealed and mark envelop along with our RFP response, please confirm?

ANSWER: Yes, this is acceptable.

QUESTION: Does HACM have an estimate number of pages that will be scanned into the system on an annual basis, preferably broken down by Document Type?

ANSWER: No we do not have any estimates. Majority of our documents are PDF and Word Documents.

QUESTION: For MBE/WBE Form A and B-1 it asks for an RFP # and Project #. I see the Official Notice # of 57730, but not the other values. Please advise what we should enter.

ANSWER: Enter 57730.

QUESTION: The RFP Addendum indicates that HACM will be using a Phased Implementation approach. Can you please describe the scope of each Phase that should be considered in scope for the RFP Response?

ANSWER: HACM will roll out three departments, Phase 1. The departments are Administration, Modernization and Development and Rent Assistance.

QUESTION: Please list the HACM Departments that will be using the Document Imaging Solution and are in scope for the RFP Response. How many locations are there for these Departments?

ANSWER: Phase 1, Administration – 809 North Broadway, Modernization and Development – 5125 W. Lisbon Ave and Rent Assistance – 5011 W Lisbon Ave. When we complete the entire roll out, we will have approximately 22 locations using this system.

QUESTION: For each Department, please list the specific Document Types that are in scope for the RFP Response.

ANSWER: We will be using Word Docs, PDF, XLS are primary documents. We also will have a handful of CAD drawing files.

QUESTION: For each Department, please list the specific Workflow Processes that are in scope for the RFP Response.

ANSWER: At this time, we do not need a work flow process.

QUESTION: Please provide a detailed description and/or process diagram of each Workflow Process that is in scope for the RFP Response.

ANSWER: Not needed

QUESTION: Please describe the specific types of integration required for current applications, such as Multi-View, AccountMate, Visual Homes, and Scan Snap. Also please describe the platform for each

application (i.e. Web-based (HTML, Java), Windows-based, Mainframe/Green Screen, in-house vs. hosted, etc.).

ANSWER:

Multiview: Uses an Oracle Database and Stores Documents Internally within the Database.

AccountMate and VisualHomes store their documents in a File Share in their RAW format.

ScanSnap Stores the files on a file share.

All Data is hosted on our servers using our network storage.

Multiview is a C/S (Client/Server) Windows Application.

Account-Mat and VisualHomes is a C/S (Client/Server) Windows Application.

ScanSnap is a Windows Application that came with the Scanner

QUESTION: Is HACM seeking a hosted/cloud-based solution or an on premise/in-house solution?

ANSWER: Prefer a hosted solution. Our documents are sensitive.

QUESTION: Please specify the number of Retrieval Users (Concurrent and/or Named Users) you would like quoted in the RFP Response.

ANSWER: We would like all users creating documents to be able to retrieve any documents they have access to maximum of 200 users.

QUESTION: Please specify the number of Workflow Users (Concurrent and/or Named Users) you would like quoted in the RFP Response.

ANSWER: N/A

QUESTION: Please specify the number of Full Text Search Users (Concurrent and/or Named Users) you would like quoted in the RFP Response.

ANSWER: 200 Users Maximum

QUESTION: Please specify the number of mailboxes you would like quoted for E-mail Archiving in the RFP Response.

ANSWER: 200 users to be able to email documents.

QUESTION: Please specify the number of Scan/Import Stations you would like quoted in the RFP Response.

ANSWER: N/A

QUESTION: Please specify which Fax integrations you would like quoted in the RFP Response (i.e. RightFax, Esker, Biscom, other).

ANSWER: We do not require any Fax Integration

QUESTION: Please specify which MFP integrations you would like quoted in the RFP Response (i.e. HP, Sharp, Xerox, Kyocera, Konica Minolta, other).

ANSWER: We use Xerox and Canon MFP's

QUESTION: Please specify which mobile platforms you would like quoted in the RFP Response (i.e. iPhone, iPad, Android, Windows, other).

ANSWER: Ipad, Iphone, Android and Windows (SurfacePro 4).

QUESTION: Number of public application forms?
a. Please provide samples.

ANSWER: N/A.

QUESTION: Electronic content in existing databases to be imported?

ANSWER: Multiview Application – but we understand this will not be possible as those documents are stored internally within the Oracle Database.

QUESTION: Plans for back-file scanning?

ANSWER: Not sure what this means?

QUESTION: Plans for data conversion?

ANSWER: N/A

QUESTION: Import forms and or data from Federal Section 8 applications?

ANSWER: N/A

QUESTION: Does HACM anticipate using the proposed solution for case management?
If no ... is there an existing case management solution?

ANSWER: No, we use internal access Database

QUESTION: Please describe the use of existing line of business applications in place.

<http://www.accountmate.com/>

<http://www.multiviewcorp.com/>

<http://www.yardi.com/>

<http://www.fujitsu.com/global/products/computing/peripheral/scanners/scansnap/index.html>

ANSWER: AccountMate by Yardi.com is an add on to Visual Homes to allow for Procurement, Requisitions, and PO's.

Visual Homes by Yardi.com is for Tenant Management, Section 8, Work Orders, Low Rent and Contracts.

Multiview is an Oracle Based General Accounting System.

ScanSnap Ix500 allows our users to scan invoices, HR Information and other documents into electronic form. It uses the ScanSnap Manager Software.

ALL PROPONENTS SHALL ACKNOWLEDGE RECEIPT AND ACCEPTANCE OF ADDENDUM NUMBER 2 (dated March 31, 2016) FOR DOCUMENT IMAGING AND MANAGEMENT SYSTEM BY SIGNING IN THE SPACE PROVIDED AND SUBMITTING THE SIGNED ADDENDUM WITH PROPOSAL. PROPOSALS SUBMITTED WITHOUT THIS ADDENDUM MAY BE CONSIDERED NON-RESPONSIVE.

_____ DAY OF _____, 2016

SIGNATURE
