

QUESTIONS AND ANSWERS # 1

Broward County Housing Authority
Solicitation Number: RFI 21-298

Document Management System (DMS)

DATE: June 3, 2021

TO ALL PROSPECTIVE PROPOSERS

Please note the following questions/clarifications:

Questions/Clarifications:

The following questions shown in *italicized* text were submitted. BCHA's response is shown in **bold** text.

	Questions	Answers
1.	<i>In reference to item # 1.05. In regard to Emphasys integration please expand on what functionality is required. Database Read/Write or full API integration?</i>	Vendors should provide all of their integration options for their DMS solution; for example, only read/write integration is available or API integration is available.
2.	<i>In reference to item #1.06. What e-signature platforms are required for this project?</i>	BCHA has not determined the e-signature platform. Vendors should identify e-signature platforms that will function with their DMS solution.
3.	<i>Regarding interfacing with BCHA apps and databases, please provide: a) detailed list of what is required. b) Provide type of database connectivity options as well if possible. Example: ODBC.</i>	(a) Database is SQL. App—Emphasys Elite Housing Software. (b) ODBC database connectivity.
4.	<i>Must be scalable to at least 100 simultaneous users. a) Will there be a need for the public to access information in the system? b) A need for portal?</i>	(a) Vendors should provide information on whether their DMS solution can accommodate public access for obtaining information. (b) Vendors should provide information on whether their DMS solution can accommodate public access to information through a portal and if the vendor can provide that service.
5.	<i>In reference to item # 15.01</i>	(a) The DMS solution would need to be sized for multiple document types and

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	<p>a) <i>Has the vendor implemented its application for at least five housing authorities of similar size?</i></p> <p>b) <i>Would a vendor be considered even if they are not able to meet this requirement?</i></p>	<p>document sizes based on records BCHA receives from approximately 12,000 residents, landlords and vendors.</p> <p>(b) All vendor responses to the questionnaire will be considered; however, BCHA would prefer solutions that address document management issues specific to public housing authorities.</p>
6.	<i>How many employed users will be using the system?</i>	Approximately one hundred BCHA employees are expected to use the DMS solution.
7.	<i>How much data is currently in place and will be transferred to the serviced solution?</i>	No data is currently in place or will need to be transferred.
8.	<i>Where is the data currently residing and accessed?</i>	Please see the response to question 7 above. In a future infrastructure expansion that would include the DMS solution, BCHA plans to move data to Azure/Cloud.
9.	<i>Please clarify number 23 under user requirements. What type of search function are you expecting?</i>	Item 23 in Section 4.2 of the DMS Functional Requirements Document refers to the application's ability to maintain a scanned image of a document in its unaltered as well as altered formats for public records purposes.
10.	<i>What is referred to the use of fuzzy logic?</i>	Fuzzy logic means the DMS solution's ability to retrieve documents which are inexact matches of a user's query, for example, a query for records containing the name "Thompson" that would also include the results "Tomson" or "Thomson."
11.	<i>What is the budget for this project?</i>	The budget for this project has not been determined at this time.
12.	<i>Is there a timeline for execution?</i>	The project implementation is expected to occur within the next twelve months.
13.	<i>Will you require ongoing support?</i>	Yes, vendors must be able to provide ongoing support.
14.	<i>Currently, are you using any Document Management System? If yes, then please inform the name of the software.</i>	BCHA is not using any DMS.

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15.	<i>Is this a new opportunity or some other vendor is currently performing similar services? If so, can you please provide the name of the current vendor and the awarded contract value for the current fiscal year?</i>	The DMS project is a new opportunity for vendors. Please see the response to question 14 above.
16.	<i>Do you have budget already available for this project? If yes, what is the maximum budget you are planning to spend on this project?</i>	No budget has been determined for the project at this time.
17.	<p><i>a) How many users would access Electronic Content Management /Records Management Software?</i></p> <p><i>b) Out of the total users, how many would need full rights (upload, edit documents) and</i></p> <p><i>c) how many will need read-only rights (only view the documents)?</i></p>	At this time, BCHA (a) estimates 100 employees will use the DMS system; (b) is not sure how many of the 100 employee users will need full rights, but probably less than 20, and all employee users should be able to upload documents, and probably less than 30 employee users should be able to edit documents; and (c) desires that the DMS solution is able to restrict any employee user to read only access based upon the document type and employee's job function.
18.	<i>Is Authority's preference more towards Cloud based Document Management System or On-Premise Document Management System?</i>	Please see the response to question 8 above.
19.	<i>Have the Authority seen demonstrations of any Document Management System? If yes, what is the name of the solution and vendor which provided the demonstration?</i>	Yes, BCHA staff participated in a demonstration of OnBase Enterprise Content, Laserfiche and DocuWare.
20.	<i>Did any vendor helped you prepare or gather requirements of this RFP? If yes, what is the name of that vendor? And is this vendor eligible to bid on this RFP?</i>	No vendor helped BCHA prepare or gather requirements for this RFI.
21.	<i>Approximately how many data do we need to migrate?</i>	Please see the response to question 7 above.
22.	<i>how many documents are there in handwritten format?</i>	BCHA's goal is to eliminate or significantly reduce the number of received handwritten documents from external sources through the use of intelligent workflows. An estimate of the number

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		of handwritten documents is not available at this time.
23.	<i>Do we need to provide Scanning services as a part of this project?</i>	Vendors should provide information regarding any scanning services which might assist in the implementation of the DMS solution; however, BCHA does not anticipate a need for scanning services.
24.	<p><i>If yes, please provide answers to following scanning related questions:</i></p> <p><i>a) What is the size and quantity of the files that needs to be scanned? Please provide approximate quantity next to the below given sizes:</i></p> <p>1. 8.5"x11" up to 11"x17":</p> <p>2. 11"x17" up to 18"x24":</p> <p>3. 18"x24" up to 24"x36":</p> <p>4. 24"x36" up to 36"x48":</p>	Please see the response to question 23 above.
25.	<i>b) What is the required preparation level before scanning the files? (how many staples or fasteners are there on each file approximately)?</i>	Please see the responses to question 23 and 24 above.
26.	<i>c) What DPI are you looking to scan the files at?</i>	Please see the responses to questions 23 to 25 above.
27.	<i>d) Do you want to make the files text searchable (OCR)?</i>	Please see the responses to questions 23 to 26 above.
28.	<i>e) What is the indexing requirements? Per Page, Per document, etc.?</i>	Please see the responses to question 23 to 27 above.
29.	<i>Please provide the total number of administrators, power users, and search/view only user licenses that are required.</i>	Vendors should provide the range of costs for administrators, power users, and search/view user licenses based upon typical requirements for a public housing authority with 100 employees.
30.	<i>How many documents are expected to be stored in the system?</i>	The number of documents needed to be stored is estimated to be no less than 30,000 annually but could be as many 150,000 annually; regardless of

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		the number of stored documents, the DMS solution must be scalable for future growth.
31.	<i>Has a budget been established for this project, and if so, can it be shared?</i>	Please see the response to question 11 above.
32.	<i>What is the expected award date?</i>	The expected award date is undetermined at this time. Please see the response to question 12 above.
33.	<i>What email system does the County use?</i>	BCHA uses Office 365 – Microsoft Outlook.
34.	<i>Is there a requirement to track physical documents or records?</i>	Vendors should provide information on their solution’s ability to track physical documents; however, BCHA has not determined if tracking physical documents is a requirement for this project.
35.	<i>Is DoD 5015.02 certification desirable?</i>	Vendors should disclose any certifications that assist BCHA is assessing the security of the DMS solution. BCHA is not requiring any specific certification for this RFI.
36.	<i>Does the County use Microsoft Office 365 and/or SharePoint?</i>	BCHA uses Office 365. SharePoint is available through Office 365 but is not currently being used.
37.	<i>Are there multiple integrations to Emphasys Elite per product (e.g. Admin, Procurement, Property Management) or a single integration?</i>	Multiple integrations to Emphasys would be required.
38.	<i>What DMS is currently being used with Emphasys Elite?</i>	Please see the response to question 14 above.
39.	<i>Is an e-signature tool currently in place or are we able to request integration with a new e-signature tool?</i>	No e-signature application is currently in place. Vendors may request a new e-signature tool be used to integrate with the DMS solution.
40.	<i>Should the solution also include a scanning software?</i>	Vendors should provide information on whether their DMS solution includes scanning software.
41.	<i>Please provide example BCHA applications and databases with which to interface.</i>	BCHA’s current application is Emphasys and information about the system is available online: www.https://emphasyspha.com/products .

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42.	<p><i>Are you looking for the vendor to configure specific agency workflows?</i></p> <p><i>Function Based 7.01</i></p>	<p>Vendors should indicate if they provide workflow configuration or if client only workflow configuration is offered.</p>
43.	<p><i>Do you have specific workflow processes either diagrammed or described in detail that vendors could use to provide an estimate of the professional services required to configure them.</i></p> <p><i>Function Based 7.01</i></p>	<p>Vendors should provide cost options regarding its professional services, if available, in configuring workflow.</p>
44.	<p><i>What is the total number of users at the agency?</i></p> <p><i>Function Based 7.01</i></p>	<p>Please see the response to question 6 above.</p>
45.	<p><i>How many users will the agency have the require: Scanning Documents into the System; Participating in proposed or planned workflow processes; Participating in Family Self Sufficiency program or other Case Management activities.</i></p> <p><i>Function Based 7.01</i></p>	<p>BCHA has not determined the number of employees assigned to tasks related to specific functions within the DMS at this time. Vendors should provide information that will assist BCHA in determining the appropriate number of BCHA employees assigned to specific DMS functions give the size of the organization.</p>
46.	<p><i>Would the agency prefer an On-Premise or a Cloud Based solution? Preferred Requirements 5 and 6</i></p>	<p>Please see the response to question 18 above.</p>
47.	<p><i>a) What is the agency plan for back file records?</i></p> <p><i>b) Is the agency looking for the vendor to propose back file scanning solutions? Function Based 7.06</i></p>	<p>At this time, BCHA anticipates a day forward implementation process that will result in BCHA maintaining some hybrid files for existing cases.</p>
48.	<p><i>Does the agency have a MS SQL or Oracle Database?</i></p> <p><i>Preferred Requirements 6</i></p>	<p>BCHA has a SQL 2019 database.</p>
49.	<p><i>Is the agency looking for the proposed system to integrate directly to Emphasis Elite?</i></p> <p><i>Questionnaire 8.02</i></p>	<p>Vendors should provide information on their DMS solution regarding integration with Emphasys to assist BCHA in determining an appropriate scope of the project Please see the response to question 1 above.</p>

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50.	<i>Is the agency looking for the proposed system to provide template-based document creation by integrating to MS Word and MS Excel? (Ie Form Letters, Vendor Contracts, etc...)Questionnaire 8.02</i>	Vendors should provide information on the solution’s ability to integrate with other software, like integration with MS Word and MS Excel.
51.	<i>Is the agency looking for the proposed system to provide real time dashboard Executive Reporting Preferred Requirements 4.01 - 4.03</i>	Vendors should provide the type(s) of reporting the solution provides, which could include, but is not limited to, real time dashboard reporting.
52.	<i>Is the agency looking for Electronic Signature capability to capture tenant and landlord signatures as part of workflow processes? Function Based 7.07</i>	The DMS solution should have the capability of integrating with an electronic signature application.
53.	<i>Can the county provide a count of the number of users expected to utilize the system based on role (System Admin, Management, BCHA Departmental/External)?</i>	Please see the response to question 45 above.
54.	<i>Can the county provide a list of current core operational systems beyond Emphasys?</i>	BCHA’s core operational systems include an OS Server 2019 and Windows 10 workstations.
55.	<i>Does the county utilize an E-Sign partner currently (DocuSign/AdobeSign/etc.)?</i>	Please see the response to question 39 above.
56.	<i>Does the county have examples of any current processes (workflow) to be automated?</i>	Current BCHA workflow processes were created without consideration on how those processes would migrate to a DMS. Therefore, processes in BCHA’s current workflows are likely to be revised based on functionality within the DMS solution. For example, the manual step of entering invoice data into Emphasys within the AP workflow process might become an automated process through integration with a DMS solution. Vendors should provide information on their solution’s workflows that would demonstrate process improvements through automation.
57.	<i>Workflow processes may require additional discovery/design – does the County have a preferred method of expressing Professional Services in the pricing area?</i>	BCHA does not have a preferred method of pricing professional services associated with a DMS solution at this time.

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58.	<i>Does the county have a preferred project management methodology? (Agile/Waterfall)</i>	BCHA does not have a preferred project management methodology for this project; however, BCHA technology staff prefer Agile as a project management methodology.
59.	<i>Regarding Azure, do you want to run in the County Azure instance or a vendors' Azure instance?</i>	BCHA wants to run its own Azure instance and not a vendor's Azure instance.
60.	<i>Do you have Azure experience or is this your first Azure project?</i>	Yes, BCHA has Azure experience.
61.	<i>Are you looking for any particular managed services of your environment?</i>	Vendors should provide information regarding any particular managed services that would be necessary or recommended for the DMS solution.
62.	<i>Can you please provide an example(s) of any workflow requirements?</i>	Please see the response to question 56 above.
63.	<i>Please describe any out of the "department" Broward County integration points?</i>	Vendors should provide information which addresses issues that might arise for internal and external integrations. At this time, BCHA is not anticipating a DMS integration with non-BCHA managed external systems.
64.	<i>Do you use a particular e-signature product?</i>	Please see the response to question 39 above.
65.	<i>Do you use a particular brand of copiers?</i>	BCHA uses Canon MFPs.
66.	<i>Do you want to host in your Microsoft Azure cloud or are you looking for us to host?</i>	Please see the response to question 59 above.
67.	<i>Of the 100 users you mention, how many are internal versus external?</i>	BCHA estimates 100 internal users of the DMS solution. Please see the response to question 5 above for the number of potential external users.
68.	<i>In reference to question 1.05 on "Attachment A Questionnaire" you asked if our proposed solution will fully integrate with BCHA's ERP Emphasys system. We need more information on what you mean by integration. Can you please provide specific examples of how you would like the two solutions to integrate so we can properly address this question?</i>	Please see the responses to questions 1 and 41 above. The DMS should capture the output from Elite in a structured, storable and searchable file/folder format.

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69.	<p><i>In reference to question 5.04 and 6.03 on “Attachment B Questionnaire” you asked if our proposed application supports “duo security” for MFA. We would need more information on what you mean by “duo-security”. Can you please provide more details?</i></p>	<p>BCHA requires that the DMS solution integrates with Microsoft Multi-Factor Authentication.</p>
70.	<p><i>In reference to question 5.09 on “Attachment B Questionnaire” you asked if we are able to provide customers the option of only having their data remain in a specific geographical location.</i></p> <p style="margin-left: 40px;"> <i>a) Can you please clarify this question?</i> <i>b) Can you please provide more information on what you are specifically looking for?</i> </p>	<p>Please see the response to question 59 above for items (a) and (b).</p>
71.	<p><i>In reference to 6.08 on “Attachment B Questionnaire”, you are asking if our proposed application can send access logs to a SIEM system. We need more information on the SIEM system you have. Can you please provide more details?</i></p>	<p>The vendor’s DMS solution should be able to provide administrative and power users/supervisors with an audit trail or audit report of each transaction.</p>



This Question and Answer Form should be returned with your proposal on the established due date.

All other terms, conditions and specifications remain unchanged for RFI 21-298.

Authorized Signature:

Name of Company:
