REQUEST FOR PROPOSALS # 2023-050
Smart Form Builder Solution
RESPONSE ADDENDUM #2
November 15, 2022

QUESTIONS

Q1: We can offer an all-inclusive Cloud platform which includes automated updates and disaster recovery; or a self-hosted solution to provide complete control over your environment. Would you want to see proposals for both options?

A1: Solutions presented should have separate pricing.

Q2: Has the issuer already considered any solutions? Please provide feedback on any systems under consideration

A2: We are a public entity which requires a public procurement process, this is our process for reviewing options

Q3: Is there any relevant incumbent for any portion of the work being requested in the RFP?

A3: This is a Request for Bid not a Request for Proposal

Q4: Do you have an Active Directory (AD) containing the users for the new solution?
   a. If so, can we sync with your AD to significantly reduce the amount of time required for user configuration?

A4: We have AD the answer will depend on the solution proposed.

Q5: Our solution is licensed by the features included with each user. Please provide the estimated user count of each type.
   a. How many full users are required? (full repository access: scan, add, edit / version documents, build forms / workflows, participate in workflows, admin. system)
   b. How many participant users are required? (unlimited submission and participation in forms processes, read-only repository access)

A5: Information on users and form needs is provided in Appendix C, Exhibit 1, Table 1

Q6: Can you provide an estimate for the number of concurrent users on the system? While we do not offer concurrent licensing, this information is helpful when providing hardware recommendations.

A6: Information on users and form needs is provided in Appendix C, Exhibit 1, Table 1

Q7: For single sign-on service (SSO) which provider(s) do you have or plan to use?

A7: We currently use CAS or Shibboleth for Single Sign-On (SSO)

Q8: Do you have any estimates for the amount of content that will be stored in the system?
   a. Number of documents
   b. Number of pages

    c.   Diskspace estimation
    d.   Database size
    e.   Database tables
    f.   Etc.

A8: Information on users and form needs is provided in Appendix C, Exhibit 1, Table 1

Q9: Our solution offers portals for non-authenticated users.
    a.   Public Portal: This option allows read-only access to the repository for anonymous public users. Please indicate your preference with regards to a public portal, along with estimated number of concurrent users AND monthly views.
    b.   Forms Portal: This option allows anonymous forms submissions by non-licensed public users. Please indicate your preference with regards to the forms portal option, along with estimated monthly submissions.

A9: Requirements are listed in Appendix D

Q10: How is content currently stored? (shared drives, local folders, Google Drive, etc.)

A10: Various storage methods are utilized

Q11: Is there an existing ECM or document management system in place?
    a.   If yes, what is it? Please provide as much detail as possible.
    b.   Do you currently have any workflows or automated business processes?
        i)   If so, please provide a typical example along with estimated number of total workflows.
    a.   Do you currently use any electronic forms?
        i.   If so, please provide a typical example along with estimated number of total forms.
        ii.   What is your current electronic forms solution?

A11: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information.

Q12: Do you have any sample forms or processes you can provide? We can demonstrate how we would automate this process using our solution if desired.
    a.   Please include the current paper or eform and a description or diagram of the workflow behind it is possible.

A12: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information.

Q13: Will there be any data conversion or migration services needed for this project?
    a.   Do you have any estimates for the amount of content that will be converted or migrated?
        i.   Number of documents
        ii.   Number of pages
        iii.   Diskspace estimation
        iv.   Database size

    v. How many database tables contain information we will need for the migration? (ex. documents, versions, metadata, annotations, etc.)

    vi. Any additional information you can provide on the system that may be helpful.

  b. Can you provide the make, model, and version of system that we will be working with?

  c. If the current system is utilizing a database, what platform is it on? (SQL, Oracle, etc.)

    i. Is there backend access to the database, or do we have to do an export through the current system?

  d. Do you have a set number of document types or metadata categories to be converted?

  e. Do you want annotations from your current system migrated?

  f. Are you using versioning in your current system?

A13: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information. We are not requesting data migration

Q14: Please provide a list of applications (with version) and a short description of the desired functionality.

  a. Oracle Peoplesoft:

    ▪ What version?

    ▪ Is it self-hosted or cloud?

    ▪ What will be the desired functionality?

    ▪ Is there an API we can work with?

  b. Salesforce:

    ▪ What version?

    ▪ Is it self-hosted or cloud?

    ▪ What will be the desired functionality?

    ▪ Is there an API we can work with?

A14: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information.

Q15: Our system uses metadata templates that contain fields common to each document type for use in indexing. Please provide a list of document types/metadata templates and the estimated field count for each.

A15: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information.

Q16: For forms and workflow development, will the selected vendor be responsible for building the required forms and workflows, or will the proposer's staff be performing development after proper training?

  a. If vendor development is preferred, please provide some examples of forms and workflows, as well as an estimated count, for cost estimation purposes.

A16: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information.

Q17: Do you already have an e-sign document solution already in place?

A17: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information. We currently utilize docusign for contracts.

Q18: How many signatures can you expect monthly?

A18: Please review Appendix C, Exhibit 1, Table 1 and estimate signatures on the volume provided.

Q19: If you plan on using existing scanners with this solution, are they ISIS or TWAIN compatible?

A19: This level of detail will be discussed with the resulting awardee

Q20: Can conference calls and web meetings be used for this project, or is on-site attendance a requirement?

A20: Yes we use ZOOM

Q21: Our customers generally prefer remote training due the ease of scheduling and travel savings. Remote training sessions are recorded and provided to the customer to allow them to reuse as needed. Is this approach acceptable, or would you require on-site training?

A21: Yes we use ZOOM

Q22: If we are not selected, will there be any opportunity for a debrief or other feedback?

A22: An Request for Bid is evaluated based on lowest pricing for solutions that meet the requirements specified in Sections 1.1.3, 1.1.4 and Appendix D.

Q23: Is there a possibility of getting an extension on the date of submission for proposals?

A23: Given this is a RFB there is limited information to be provided, so we need to remain with the current schedule.

Q24: Can you provide a summary of the kinds of use cases that you envision for the form builder solution

A24: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information.

Q25: Who will be the users of the forms (e.g., students, faculty, staff, parents, alumni, etc.)?

A25: It will depend on the departments needs

Q26: What is the total employee headcount for the University of Maine System? (Our subscription fees are based on total employee headcount including fulltime and parttime staff, faculty, and student workers.)

A26: The initial pricing is for University of Maine at Farmington only and is limited to a signal department with 15 form users.

Q27: For requirement #1, Appendix D, Does the University require a cloud-based solution or would an on-premise solution be considered?

A27: Cloud-based solution only

Q28: For requirement #3, Appendix D, would you want to drive conditional logic based on real-time data (e.g., user roles, student data, person data, job data, etc.)?

A28: Yes

Q29: For requirement #5, Appendix D, how do you define "embeddable"?

A29: Enabled integration of SmartForms into web page design

Q30: For requirement #11, Appendix D, what kind of integration is desired for PeopleSoft?

A30: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information.

Q31: Which PeopleSoft application suites does the University use (i.e., HCM, FSCM, Campus Solutions, ELM)?

A31: HCM, FSCM, Campus Solutions

Q32: Are your PeopleSoft applications located on-prem, hosted in a third-party datacenter, or hosted in the Cloud?

A32: Cloud

Q33: What application releases and PeopleTools releases are in production?

A33: We are in the middle of a migration process with the tools. Please base your solution on the information provided.

Q34: Would the University want the forms to pre-populate with PeopleSoft data from student records, employee records, job records, finance, etc.?

A34: Potentially

Q35: For requirement #12, Appendix D, what kind of integration is desired for Salesforce?

A35: Salesforce integration will depend on the resulting department needs.

Q36: Does the University currently have a document management or enterprise content management system that you would want the forms to integrate with?

A36: We are requesting a solution that meets the RFB requirements listed in Section 1.1.3, 1.1.4 and Appendix D. Please focus on providing options based on that information

Q37: Would there be a desire for the forms to support attachments?

A37: Potentially

Q38: Would there be a desire for users outside the University to access and interact with forms?

A38: Potentially

Q39: Would there be a desire for forms to automatically update target systems (e.g., PeopleSoft, Salesforce, etc.)?

A39: Yes

Q40: Additional clarification on description #5 "Solution provides embeddable forms"?

A40: Enabled integration of SmartForms into web page design

Q41: Confirmation that the request is for 15 users (licenses)? If so, how many would be admins that would need access to the web portal to live manage/ update/ edit the forms?

A41: Assume all need full access.