CHARTER TOWNSHIP of INDEPENDENCE, MICHIGAN
Enterprise Content Management (ECM)
Request for Proposals
August 2016
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EXECUTIVE SUMMARY

Introduction

The Charter Township of Independence (Township) invites prospective contractors to submit responses to its request for proposal (RFP) for an Enterprise Content Management System (ECM).

The Township is located in north central Oakland County, Michigan and is approximately thirty-six (36) square miles in area with a population of approximately 36,000. It is bordered by Springfield Township to the west, Brandon Township to the north, Orion Township to the east, and Waterford Township to the south. The City of Detroit is located approximately 40 miles to the southeast of the Township. Other nearby urban centers include Pontiac (10 miles) and Flint (25 miles). The City of the Village of Clarkston is located within the Township area.

The Township is a growing and thriving community with local businesses, developers and citizens requiring increasing levels of effective, efficient and accountable services from Township government to meet their service, development, recreation and public safety needs. To meet these growing service expectations, the Township needs to efficiently operate a variety of administrative functions and relies on a number of information systems, the primary being BS&A which supports assessing, building, public works, finance, human resources, and payroll functions and records. Other major systems used by the Township include ESRI GIS and Azteca Cityworks Computer Maintenance Management System (CMMS). The selected ECM solution must integrate with these systems and provide a methodology to migrate the Township’s existing electronic documents that are stored in their Secure-IT (f.k.a. FileBound) Document Management System.

The Township seeks the services of a qualified implementation partner to provide the ECM solution and the implementation services described herein.

Project Overview and Objectives

The Township seeks to acquire an ECM platform to serve as the single and central ECM platform for all Departments including Assessing, Building, Clerk, DPW, Fire, Human Resources, Payroll, Parks, Planning, Recreation, Senior’s, Supervisor, Treasurer and Zoning. The Township also wishes to streamline processes to improve the way in which employees retain access, share, analyze, and process critical information through the use of ECM technology. The ideal system must be: robust and affordable; integrate seamlessly with the Township’s BS&A, ESRI GIS and Azteca Cityworks CMMS; mobile and provide a migratory capability to incorporate existing DMS content from the Secure-IT (f.k.a. FileBound) system. The Township also utilizes RescueNet, RecPro & Manager+, FitPro+ and CodePAL applications that they would also like to be able to integrate ECM to where possible.

The System must also incorporate the technologies of Workflow, Content Management (keyword searching), Reporting/Visual Data Modeling, and Data Capture using both Optical Character and Intelligent Character Recognition (OCR/ICR).
The Township currently has no ECM capability other than ad-hoc scanning and storage of some documents in BS&A and Secure-IT (f.k.a. FileBound). To provide an ECM single point of access to the Township’s electronic records capabilities of a successful system includes:

- Enabling staff to search and access information more efficiently, leading to improved customer service and service delivery, and greater efficiency.
- Enabling improved information sharing.
- Enabling a basis for streamlined business processes via automating the flow of work.
- Improving the ability to respond to Freedom of Information & Protection of Privacy Act, legal discovery and admissibility.
- Improving vital records protection and promote disaster recovery.
- Improved management of long-term preservation of the Township’s unstructured paper and electronic records.
- Reduction of the physical storage requirements for paper and electronic records.
- Development of enhanced retention and disposition rules.

The successful vendor shall provide the ECM solution and install and configure it on the Township’s systems. In the initial implementation, the vendor shall be responsible for fully implementing the ECM for the Building Department, Clerk’s office, Department of Public Works and Fire Department including integration of their existing Secure-IT (f.k.a. FileBound) documents into the ECM. The implementation will also include an assessment of the Departments ECM requirements and an architecture to support future expansion of the solution to the rest of the outlined Departments.

The Township intends to utilize the experience gained in these projects to continue the roll-out process to the other Township Departments. Therefore, an additional objective of this project will be for the vendor to train up to four (4) selected Township staff to be competent technical administrators of the ECM.

As part of this project, the successful vendor must work with the Township’s IT provider I.T. Right to facilitate server hardware and network requirements and installation.
RFP Response Requirements and Timeline

Response Submission
The Enterprise Content Management (ECM) response is due by 2:00 PM EST on Thursday, September 22, 2016. Late proposals will not be accepted.

SUBMIT RESPONSE IN ELECTRONIC FORMAT* TO:
Charter Township of Independence
Barbara Pallotta, Clerk
6483 Waldon Center Drive
Clarkston, MI 48346

*SUBMIT THE RESPONSE IN PDF OR MICROSOFT WORD FORMAT ON COMPACT DISC OR FLASH DRIVE AND NAME THE DOCUMENT ACCORDING TO THE FOLLOWING NAMING PROTOCOL: 20160922-ECM-VENDOR NAME

Response Questions
Questions regarding the RFP should be directed, via e-mail, to the following contact by 4:00 PM EST on September 8, 2016:

Barbara Pallotta, Clerk
bpallotta@indtwp.com

Responses to all questions received will be returned to all vendors. Vendor names, where mentioned, will be left out.

The Township has established the following timeline in relation to the project. Note that dates are subject to change. Vendors will be notified, via an addendum to this RFP, of any changes in the timeframe.

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Distributed:</td>
<td>August 12, 2016</td>
</tr>
<tr>
<td>DEADLINE for QUESTIONS submitted in relation to RFP:</td>
<td>September 8, 2016 @ 4:00 p.m.</td>
</tr>
<tr>
<td>DEADLINE for RECEIPT of RFP Responses:</td>
<td>September 22, 2016 @ 2:00 p.m.</td>
</tr>
<tr>
<td>Short list of vendors determined and notified:</td>
<td>October 6, 2016</td>
</tr>
<tr>
<td>Onsite Vendor Demonstrations:</td>
<td>October 17-21, 2016</td>
</tr>
<tr>
<td>RFP Awarded at Township Board of Trustee Meeting:</td>
<td>November 1, 2016</td>
</tr>
<tr>
<td>Estimated Date of System Implementation:</td>
<td>November 14, 2016</td>
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</table>
Evaluation Criteria

All proposals and contracts awarded as a result of this RFP are subject to the Township’s terms and conditions as stated in this RFP. The submission of any other terms and conditions by a vendor may be grounds for rejection of the vendor’s proposal.

The RFP process provides all interested vendors with an equal opportunity to offer their services. The process of competitive negotiation being used in this case should not be confused with the process of a competitive Invitation for a Bid where the goods or services being procured can be precisely described and the financial proposal is generally the determinative factor. The Township has the flexibility to negotiate with a vendor to arrive at a mutually agreeable relationship. The Township is not required to accept any proposal if in its judgment the Township’s interests are better served by declining to do so.

The Township intends to award the project to the vendor whose proposal represents the best value to the Township. Proposals will be evaluated in three phases.

**Phase 1. Initial Review:** The Township will review the submitted proposals against the mandatory evaluation criteria. Those that meet those criteria will be submitted to a technical evaluation in Phase 2. The Township reserves the right to reject any or all proposals, to waive any irregularities or informalities not affected by law, to evaluate the proposals submitted and to award the contract according to the proposal which best serves the interests of the Township.

The following Mandatory Pass/Fail Table will be completed by the submitting vendor subject to review by the Township selection committee. Successful compliance with the core functionality requirements of the solution being proposed by the vendor will move their proposal into Phase 2.
Phase 2. Technical Evaluation: The Technical Evaluation will be based on written responses to this RFP. The evaluation will be scored according to the requirements identified in this RFP. The Township may also have the Proposals or portions of them reviewed and evaluated by independent third parties, end users of the proposed system, or various Township personnel with experience that relates to the work or to a criterion in the evaluation process. The Township may adopt or reject any recommendations it receives from such reviews and evaluations or give them such weight as the Township believes is appropriate.

During the technical evaluation, the evaluation committee will calculate a point total for each Proposal that it evaluates. The Township may select those proposers submitting the highest rated Proposals for the next phase. The number of Proposals that advance to the next phase will be within the Township’s discretion, but regardless of the number of Proposals selected, they always will be the highest rated Proposals from this phase. Points will be assigned according to the schedule below and point totals will be used to derive an overall ranking of the proposals.
Phase 3. Demonstrations and Interviews: At the conclusion of the Phase 2 Technical Evaluation, the Township may at its sole discretion proceed immediately to negotiate a contract with a selected vendor, or, if deemed necessary, may implement a Phase 3 in which the Township will invite no more than three proposers to provide detailed demonstrations and conduct interviews with proposed team members.

Each interview will consist of a presentation and testing of selected parts of the application, and each finalist will be evaluated according to equal criteria. Notice of confirmation of the interview date/time will be given by writing.

Upon completion of the demonstrations and interviews the selected vendor will be contacted to enter into contract negotiations, at which time the proposals from other vendors will be held in abeyance until successful contract negotiations have been completed.
SECTION 1: VENDOR SOLUTION INFORMATION (100 POINTS)

Vendor Experience and Qualifications (40 Points)

1. Provide a brief (1-2 paragraphs) background of your organization, including the year it was founded.

2. Provide a brief (1-2 paragraphs) background of the solution you are proposing and how you see it being implemented in the Township.

3. Provide the percentage of your total annual revenue that is driven by enterprise content management (ECM) related revenue (e.g., software, services, maintenance, etc.).

4. What percentage of your revenue is derived from the following:
   - Software License Fees
   - Maintenance Fees
   - Professional Services / Consulting
   - SaaS Revenue

5. Provide evidence of what your organization is doing to remain a viable and stable player in the ECM market.

6. Describe the financial stability of your organization. Include documentation depicting this stability.

7. What is the annual research & development (R&D) investment for the ECM solution being proposed, both in terms of financial investment and total number of employees dedicated to the R&D function?

8. How much of your R&D is the result of customer requests (enhancement, new functionality)?

Total # of Points: _________ (Max 40 Points)
Vendor Strategic Partnerships (25 points)

1. Describe your partnership with Microsoft from a product, technology, and business perspective.
2. Describe your relationship with ESRI ArcGIS, ArcGIS Online and other ESRI ECM integrations.
3. Describe your relationship with Azteca Cityworks and integrations with your solution.
4. Describe your ability to migrate the Township’s existing Secure-IT (f.k.a. FileBound) documents into your solution.

Total # of Points: __________ (Max 25 Points)
Vendor Competitive Analysis (15 points)

1. List any of the relevant independent ECM analyst reports and rankings validating your solution within the ECM market (e.g., Gartner Magic Quadrant for Enterprise Content Management, Forrester Wave: Enterprise Content Management).

2. Describe what generally differentiates you from your key competitors.

3. Describe your market share in the ECM space.

Total # of Points: __________ (Max 15 Points)
Vendor References (20 points)

1. How many related municipal organizations have implemented your solution overall? Related Michigan solutions are preferred.

2. What percentage of your customers are still running your solution with active maintenance and support contracts (i.e., lifetime customer retention)?

3. Provide the name of the oldest, active customer of your solution.

4. How many organizations have implemented your solution in the past fiscal year?

5. How many customers were added in the past three (3) fiscal years?

6. Describe your customer retention.

7. Describe the customer industries you service.

8. Provide information in relation to three (3) customers who have implemented a solution similar to the Township. Include company name, location, inception date, and solution specifics.

9. Would you be willing to host our organization for a site visit at your corporate headquarters?

Total # of Points: _________ (Max 20 Points)

TOTAL # OF SECTION 1 POINTS: _________ (100 Points Max)
SECTION 2: PROJECT PERSONNEL (100 POINTS)

1. Provide the current number of employees dedicated to the solution you are proposing. Include titles and responsibilities for completion of the project. (25 Points) Total Points ________

2. For each of the project team members, list their relevant experience with implementing a municipal solution with Departments including Assessing, Building, Clerk, DPW, Fire, Human Resources, Payroll, Parks, Planning, Recreation, Senior’s, Supervisor, Treasurer and Zoning. (35 Points) Total Points ________

3. Provide the number of offices and their locations for your organization. (10 Points) Total Points ________

4. Provide statistics related to the number of employees your company has added over the past five (5) years. (5 points) Total Points ________

5. Provide the average employee tenure for your Technical Support team. (15 Points) Total Points ________

6. Provide the longevity, in terms of years, of your executive management team, particularly your CEO and CTO. (10 Points) Total Points ________

TOTAL # OF POINTS FOR SECTION 2: __________ (Max 100 Points)
SECTION 3: FUNCTIONAL REQUIREMENTS (500 Points)

A: Solution Client Access (40 Points) Total Points ______

Client User Interface Yes/No (5 Points) Total Points ______

1. Can users easily navigate and perform their primary job tasks with little-to-no training and with intuitive ribbon-style toolbars, tabs, and easy access features that are based on the familiar look and feel of Microsoft Office products? Explain, if necessary.

2. Does the client provide capabilities for users to personalize their user experience (e.g., personalized home page that opens to personal workflow lifecycles, stored favorite retrievals, etc.)? Explain, if necessary.

3. Does the client display all of the associated information about a document right alongside the image itself – displaying index values, notes, related documents, revisions, discussion threads, and document history? Explain, if necessary.

4. Does the client provide the ability to display the document being indexed in a preview pane during the indexing process? Explain, if necessary.

5. Does the client provide the ability to auto-import camera images and media files directly from a connected device? Explain, if necessary.

6. Does the client enable users to play, stop, and pause multimedia files (audio / video) with the native viewer? Explain, if necessary.

7. Does the client enable users to filter and sort document lists by column headings or pre-defined search filters to narrow result sets? Explain, if necessary.

8. Does the client enable users to view Microsoft Office and Google word processing documents without a local install of the Office application? Explain, if necessary.

9. Does the client enable users to export data, documents, and/or links to documents out of the system via e-mail, to a file share, or a spreadsheet? Explain, if necessary.

10. Does the client enable users to organize documents in nested, parent-child folders with color-coded tabs that create and populate themselves as documents enter the system or are processed via workflow? Explain, if necessary.

Web Client Interface (5 Points) Total Points ______

11. Does the Web client provide a dashboard component to create and manage personalized interfaces that present end users with access to priority content and tasks (e.g., workflow status report, commonly used document searches, etc.)? Explain, if necessary.
12. Does the Web client solution offer full support for Internet Explorer, Firefox and Google browsers on the Windows platform? Explain, if necessary.

Search Experience (5 Points) Total Points ______
13. Does the solution enable users as well as administrators to create their own personalized saved searches? Explain, if necessary.

14. Does the solution provide the ability for meaningful document names to appear in a search results list that can contain both static text as well as defined index values, offering a more detailed description of the documents returned? Explain, if necessary.

15. Does the solution provide an advanced full-text search capabilities that include fuzzy, inflectional, customizable thesaurus, proximity, wild card, Boolean, and SOUNDEX? Explain, if necessary.

16. Does the solution provide the ability to utilize full-text searching alongside index value (e.g., date, keyword, etc.) search? Provide a screen shot depicting this capability from a single interface? Explain, if necessary.

17. Does the solution allow users to search for multiple document types (e.g., text, COLD, image, PDF, Word, Office, DWG, etc.) in one search and provide hit-highlights directly on documents and easy page-to-page navigation between hits? Explain, if necessary.

Search – Microsoft Office (4 Points) Total Points ______
18. Does the solution provide the capabilities to not only retrieve and archive to the ECM system from the native Office tabbed ribbon toolbar, but also search and retrieve ECM stored content from directly inside the native office application? Explain, if necessary.

Retrieval (3 Points) Total Points ______
19. Does the solution provide the ability to automatically link related documents of similar or different file types to each other (e.g., a mainframe-generated text file to a TIFF image)? Explain, if necessary.

Integrated Workflow (3 Points) Total Points ______
20. Is the solution’s workflow experience integrated to provide task buttons and user interaction on a menu right from selected or open documents through standard document retrieval (i.e., user does not need to enter the workflow client)? Explain, if necessary.

Offline Client Experience (2 Points) Total Points ______
21. Does the solution provide capabilities for an offline mobile worker to access documentation, complete forms, capture signatures, etc. should they become disconnected to the network and then synchronize work back into the system when they are back online? Explain, if necessary.

Mobile Devices (3 Points) Total Points ______
22. Does the solution provide natively-built interfaces to standard mobile devices - BlackBerry, iPad, iPhone, Windows Phone, Windows Surface tablets, and Android phone and tablets? Explain, if necessary.
Client Deployment (2 Points) Total Points ______
23. Does the system offer a ClickOnce or MSI-deployable solution for the client interface, minimizing administration overhead and supporting IT policies? Explain, if necessary.

E-Mail Integration (3 Points) Total Points ______
24. Does the solution allow for drag-and-drop import of messages into the ECM system using e-mail client folders in order to automate the classification and indexing of e-mails and attachments (e.g., users could create a folder for purchase orders, one for invoices, another for resumes, etc.)? Explain, if necessary.

25. Does the solution allow for e-mails and attachments to be automatically imported and fully indexed into the system without any user intervention or data entry? Explain, if necessary.

26. List the versions of Microsoft Outlook that you support.

E-Mail Integration to Workflow (3 Points) Total Points ______
28. Does the solution allow the user to access the ECM system’s workflow processes from the e-mail client interface, with the ability to decision items (execute tasks) and view related documents directly from the e-mail message notification? Explain, if necessary.

E-Mail Archive (2 Points) Total Points ______
29. Does the solution provide an E-mail Archive that offers the ability to assign time-based retention to e-mails with the ability to put an e-mail or group of e-mails “on hold,” preventing automatic destruction? Explain, if necessary.

30. Does the solution support single instance storage of both e-mail and attachments? For example, e-mails and attachments are only stored once in the E-mail Archive, with the sender and all recipients pointing to one record / file? Explain, if necessary.

31. Does the solution provide the ability for users to access an e-mail in the archive directly from their ECM or e-mail client? Explain, if necessary.

32. Does the solution provide the ability to search on e-mail index values and/or perform a full-text search on e-mail and attachment content? Explain, if necessary.
B:  Record Capture (40 Points) Total Points for Section B________

Document Capture (5 Points) Total Points ______
1. Describe the breadth of your solution’s native, individual capture solutions.
2. Describe your ability to scan documents and information (central and remote).
3. Describe your ability to quality assure/verify documents once electronically captured (centrally and remotely).
4. Describe your ability to import documents and information (central or remote).
5. Describe your ability to automatically classify documents.
6. Describe your ability to extract information and index documents (centrally and remotely).
7. Describe your ability to define and apply business rules to validate extracted data.
8. Describe the user experience during verification.
9. Describe your ability to deliver images and data to a destination of choice.
10. Describe the system’s ability to capture and index documents from remote users through either a web-based connection or disconnected method.
11. Describe the system’s ability to perform quality assurance (QA)/verification of captured image documents. For instance, the solution should provide options to QA image quality and/or index accuracy. It should also provide a simple image re-scan process.
12. Solution’s capture process allows for page separation and retrieval. This should include the separation of image and PDF file types.

Electronic Document Capture (5 Points) Total Points ______
13. Describe your solution’s capabilities related to electronic capture.
14. Describe your solution’s ability to full-page OCR.
15. Describe the solution’s support of sweeping images and other file types from a network directory, providing an indexing interface for viewing those documents while classifying and indexing them.

Application-Specific Integration (3 Points) Total Points ______
16. Describe the ability to import content into your repository from directly within an application such as Microsoft Word or Excel.
Workflow (3 Points) Total Points ______
17. Describe the ability of your capture solution to integrate with your workflow engine.

SharePoint Integration (2 Points) Total Points ______
18. Describe the capabilities you offer for scanning through the Microsoft SharePoint interface.

COLD (3 Points) Total Points ______
19. Solution provides ability to easily and quickly configure the ingestion of print streams.
20. Does the solution provide the ability to parse a print stream and index documents in one process? The solution should be able to handle multiple types of print streams. List those supported by your system.

Fax / MFP Integration (3 Points) Total Points ______
21. Does the solution provide the ability to integrate with other devices (e.g., fax, MFP, etc.) as a means of ingesting documents into the system? Explain, if necessary.

Indexing (3 Points) Total Points ______
22. Describe the indexing capabilities available within your solution.
23. Describe your capture process’s ability to automatically fill several index values on a document based on a primary index value that triggers the automatic look-up of additional index information already contained within the system.
24. Describe your solution’s ability to automatically search for sensitive data and intelligently generate redacted zones.

Recognition Technologies (3 Points) Total Points ______
25. Describe the system’s ability to natively provide data and text extraction capabilities for scanned image documents, including OCR, ICR, OMR, bar codes, and signature detection, in order to provide hands-off processing of scanned documents directly into the system without involving third-party software applications.

Image Management (3 Points) Total Points ______
26. Describe the solution’s ability to control and track the modification of documents through multiple revisions, allowing users to view prior revisions and track document history. The solution should clearly display the number of revisions associated with a specific document. The solution should allow for the addition of comments per revision.
27. Does the solution provide the ability to stamp a specific revision of a document as a version, limiting which revisions of a document a certain user can see? Explain, if necessary.

Electronic Signature (3 Points) Total Points ______
28. Describe the native ability to associate an electronic signature with an event managed by your solution.
29. Does the solution provide one central GUI for administration and deployment of capture products? Explain, if necessary.

**Configuration (2 Points) Total Points _____**

30. Describe the out-of-the-box configurable options related to your solution’s scanning interface.

**Scalability (2 Points) Total Points _____**

31. Describe the features that enable your system to scale for high-volume imaging applications.
C: Management (40 points) Total Points for Section C_____

User Environment (4 Points) Total Points ______
1. Are the solution’s workflow configuration and user interface environments integrated with the rest of the ECM solution (i.e., you can access the workflow interface from within the client environment)? Explain, if necessary.

Process Design (4 Points) Total Points ______
2. How many configurable workflow business rule templates are available out-of-the-box with your system? Explain what parameters are available, excluding any scripted capabilities, upon configuration.
3. How many configurable workflow actions are available out-of-the-box with your system? Explain what parameters are available, excluding any scripted capabilities, upon configuration.
4. Is there a graphical flow design tool to model processes?

Process Initiation (4 Points) Total Points ______
5. Does the solution allow for documents to be added to a workflow in several different ways, including:
   - Scanning
   - Enterprise text report processing
   - Electronic forms processing
   - Document import processing
   - API
   - E-mail interface
   - Drag and drop from a line-of-business application screen
   - Adding documents already stored within the solution’s repository to a workflow process at a specific point-in-time
6. Immediately upon import, based on the document type, does the solution automatically identify with which workflow processes to associate a given document.

Configuration (4 Points) Total Points ______
7. Does the solution provide the ability for the workflow process to interact directly with defined Web services, allowing external data received to be used as part of a workflow process (e.g., confirm a delivery date from a website such as ups.com)? This is to be accomplished out-of-the-box with point-and-click configuration. Explain, if necessary.

Work Distribution (4 Points) Total Points ______
8. Does the solution allow for the automatic distribution and sorting of work based on load balancing rules? Rules should include role, availability, percentage, order of arrival, index values, or the size of existing workloads for users, as well as custom-built work distribution rules. This load balancing should also allow for the rebalancing of work to users if inequity is discovered within the workflow processes.
User Experience (4 Points) Total Points ______

9. Does the solution provide for customized instructions to be displayed within the workflow application, directing the end user on what functionality they can or should execute? Explain, if necessary.

Decision Making (3 Points) Total Points ______

10. Describe the system’s ability to dynamically query, directly within the workflow interface, related documents associated to the transaction to provide better decision making.

11. Describe your workflow solution’s ability to provide out-of-the-box visual indications of missing documents required of a work packet.

12. Describe your workflow system’s ability to conditionally present a targeted set of user tasks, based on role and step of the process, to assist with processing decisions.

13. Describe the system’s ability to retrieve or perform activity on related documents that may exist in the solution’s ECM repository (file server), outside of the documents that currently exist within various stages of the workflow process.

14. Describe the system’s ability to provide for a document in a workflow to check an attribute (document property or index value) on a related document and make a processing decision, such as how the document is to be routed, based on pre-configured logic and rules.

15. Solution provides the ability to perform parallel processing by automatically routing a single document through multiple business processes simultaneously and allowing multiple users to access and work on the same document.

16. Upon execution of a task within a workflow process, does the solution provide the ability to automatically present a prompt requesting additional information for downstream processing (e.g., hiring manager determines a candidate as a “no fit” for a given position and is prompted for feedback on candidate’s positioning for a role elsewhere in the organization)? This is to be accomplished out-of-the-box with point-and-click configuration.

Routing (3 Points) Total Points ______

17. Many workflow processes require the user to select a simple decision task such as “approve” or “deny.” Explain how additional out-of-the-box tasks can be presented to users, allowing them to execute more business-specific functions (e.g., simple tasks such as print, annotate, and e-mail; advanced tasks such as calling out to external systems, advanced routing, document composition, or the creation of an e-form).

Integration (3 Points) Total Points ______

18. Does the solution provide the ability to present and access workflow from the locations noted below? This should be accomplished out-of-the-box or through a productized offering. Provide a screen shot depicting this functionality within these viewers:
• BlackBerry
• iPad
• iPhone
• Windows Phone
• Android
• Standard Client
• Outlook
• URL String
• Web Client
• Line-of-Business Application
• SharePoint

**Business Activity Monitoring (2 Points) Total Points ______**

19. Does the solution provide a native, configurable workflow dashboard to monitor, in real time, the workload of end users? This should provide for an automatic visual notification within that dashboard when a process threshold has been crossed. Provide a screen shot so that we may have a visual representation of this.

20. Does the solution provide for a browser-based workflow dashboard to be displayed natively through your client interface, Microsoft SharePoint, or any WSRP 1.0-compliant portal product without any custom coding? Provide a screen shot so that we may have a visual representation of this.

**Reporting (2 Points) Total Points ______**

21. Does the solution produce reports utilizing custom transactions (e.g., approval time stamps added by a specific user during a transaction)? Explain, if necessary.

22. Does the solution provide preconfigured workflow reports that detail processing information such as:
   - Average Time to Process Document per Lifecycle
   - Daily Workflow Usage
   - Document Process Time per Workflow Queue
   - Documents Processed per Queue
   - Documents Resident per Queue
   - High or Low Document Processing Identification
   - Queue Processing Time per User in Minutes
   - Describe the specific report(s)

**Electronic Forms (3 Points) Total Points ______**

23. Will the Workflow solution include, at no additional cost, your native electronic forms application? Explain, if necessary.

24. Does the solution support the use of electronic forms natively without requiring the purchase of any proprietary forms software? Explain, if necessary.
25. Is the solution’s electronic forms offering architected in a way to interact with other parts of your ECM repository including:

- Document import capture
- Web (online form submission)
- Web portal and SharePoint (form creation / submission through portal)
- Index value design and structure
- Cross-referencing or connecting related documents
- Notes / annotations
- Workflow (form auto-triggers a workflow process)
- E-mail (form viewed as attachment)

26. While completing an electronic form, do users have the ability to attach documents to it, allowing those documents to automatically be associated with the form? Explain, if necessary.
D: Integration (40 Points) Total Points for Section D

Non-Programmatic Integration (15 Points) Total Points ____

1. From a data-centric business application, based on account/record information presented on the screen, does the system allow users to retrieve ECM-stored documents without custom programming, API programming, scripting, or modifications to the existing application? Explain, if necessary.

2. Does the solution provide the ability to execute separate and distinct document retrievals from sections/fields on the screen? Explain, if necessary.

3. Beyond retrieval, does the solution allow for other ECM functions to be performed, non-programmatically (i.e., point-and-click configurable), within the business application? This includes the ability to execute ALL of the following ECM functions from a single screen:
   - Index ECM stored documents using data on the business application screen
   - Present user with a workflow step in context with the business application screen
   - Launch a complete set of related documents presented in a tabbed folder view
   - Launch scanning interface to perform ad hoc capture related to the account / record
   - Create a scanning cover sheet with bar codes using data from the business application screen
   - Retrieve documents based on a custom query from the business application screen
   - Index captured documents using data from more than one screen within more than one business application
   - Launch and complete an electronic form to track an event or start a workflow process
   - Create a form letter from a Microsoft Word template, using data on the business application screen

4. Does the solution provide integration with e-mail clients like Microsoft Outlook, IBM Notes, and Novell GroupWise, allowing users to access ECM functionality and import e-mails and attached documents into the repository directly from their e-mail interface? Explain, if necessary.

5. Does the solution have a non-programmatic configuration enabling the system to be auto-aware of any business application that is integrated for document retrievals (meaning a user does not have to manually declare the business system in which they are working)? Explain, if necessary.

6. Does the solution provide http URL requests to retrieve documents, present workflow interfaces, and present a folder interface in lieu of custom programming? Explain, if necessary.

Programmatic Integration (15 Points) Total Points ____

7. Does the system offer well documented, robust API(s)? Describe in detail.

8. Explain your existing API training program available to help organizations extend their ECM investment.
Synchronization (10 Points) Total Points ______

9. Does the solution offer the ability to synchronize data in real-time behind the scenes? Explain, if necessary.

10. Does the solution guarantee the delivery of data exchanged between systems in the event of an outage? Explain, if necessary.

11. Does the system offer the ability to trigger events when information changes in the business system or the ECM system? Explain, if necessary.
E: Storage of Records (40 Points) Total Points for Section E

Records Management (5 Points) Total Points ______

1. Is the records management functionality provided by the solution native without requiring integration with a third-party or external RIM tool? Explain, if necessary.

2. Does the solution provide the ability for documents to be automatically declared as records without any user interaction? Explain, if necessary.

3. Does the solution allow for multiple documents to be grouped together and treated by the system as a single record, with a single retention plan? Explain, if necessary.

4. Does the solution provide the ability for a document(s) to be dragged and dropped into a record (folder of documents) and have this new document automatically inherit the records management policy? Explain, if necessary.

Record Types (5 Points) Total Points ______

5. Does the solution allow users to capture, declare, and store electronic records (documents) in their native formats, including e-mail, electronic forms, physical items, images, text files, and Office documents? Explain, if necessary.

Hold (5 Points) Total Points ______

6. Does the solution provide the ability to place a hold (or multiple holds) on a record, as in the case of an audit or legal discovery? Explain, if necessary.

Auditing (5 Points) Total Points ______

7. Does the solution provide the ability to identify both complete and incomplete records across the entire repository? Explain, if necessary.

Workflow (3 Points) Total Points ______

8. Describe how you configure records management events (including Open, Closed, Cutoff, Hold, and Final Disposition) to be automatically posted to a record from within your workflow engine.

Purging (3 Points) Total Points ______

9. Does the solution provide a variety of destruction options, including the ability to keep both index values and files permanently, keep only index values, or purge both index values and files with or without a history log (certificate of destruction)? Explain, if necessary.

Physical Records Management (3 Points) Total Points ______

10. Does the solution provide a holistic view of both digitally-stored content and physically-stored content in a single search results list? Explain, if necessary.
Administrative (4 Points) Total Points ______

11. Does the solution provide an administrative view of physical record locators either pending check-out (requested) or currently checked out with appropriate location information (item name, user in possession, expected return date, identifier, repository, repository name)? Explain, if necessary.

Searching (3 Points) Total Points ______

12. Does the solution provide an easy way for administrators to locate/filter records? Explain, if necessary.

Encryption (4 Points) Total Points ______

13. Does the solution provide the ability to partially or fully encrypt data and documents using AES 256-bit encryption? Explain, if necessary.
F: Auditing and Reporting (40 Points) Total Points for Section F______

Auditing (12 Points) Total Points ______
1. Does the solution provide the ability to access a document-level audit trail directly from the document? Explain, if necessary.

2. Describe what is natively tracked in your out-of-the-box audit trail.

3. Does the solution allow a system administrator to perform an ad hoc audit on system-related activities from within the client (e.g., identification of all documents accessed by a recently released employee)? Explain, if necessary.

4. Does the solution allow an administrator to create custom audit log entries tied to workflow progress for the purpose of generating business process reports? Explain, if necessary.

Reporting (12 Points) Total Points ______
5. Does the solution’s reporting tool directly integrates with Microsoft Excel, allowing users to build reports natively in Excel utilizing the ECM system attributes? Explain, if necessary.

6. Does the solution provide, within Microsoft Excel, point-and-click data mining and modeling of text-based reports stored within your repository? Explain, if necessary.

Exception Reporting (8 Points) Total Points ______
7. Does the solution provide a report out-of-the-box (with no custom coding) that identifies matched, unmatched, or missing numeric and/or character index values between a primary document and secondary document(s) (i.e., automated reconciliation report)? Explain, if necessary.

8. Based on the exception identified, does the solution automatically route exception items from the exception report to a workflow for proper resolution? This should be accomplished without any coding. Explain, if necessary.

Visibility (8 Points) Total Points ______
9. Does the solution provide real-time visibility without involving internal technical resources? Explain, if necessary.

10. Does the solution provide the ability to create visual, interactive dashboards for monitoring system and process health in real-time, without any coding? Explain, if necessary.

11. Does the solution provides the ability to access dashboards from anywhere? Explain, if necessary.
G: System Architecture (40 points) Total Points for Section G

Index Value Configuration (3 Points) Total Points ______
1. Does the system support an unlimited number of index values per document? Explain, if necessary.

2. Provide an overview of the different metadata types you support (e.g., date, date and time, currency, specific currency, alphanumeric, numeric, floating point, etc.).

3. Does the solution provide point-and-click configuration for index values, with multiple pre-configured formats (e.g., date: dd/mm/yyyy, month/dd/yy, mm-dd-yy)? Explain, if necessary.

Index Value Addition (3 Points) Total Points ______
4. Describe your system’s ability to define multiple instances of the same index value field to a single document without any programming. Explain how this is accomplished.

Index Value Grouping (3 Points) Total Points ______
5. Does the solution provide the ability to store index value sets that can later be used to auto-index documents by entry of only a single primary value? This enables simplified indexing and more flexible retrieval by allowing users to enter a single index value and have all related index values auto-populate.

Index Value Updates (2 Points) Total Points ______
6. Provide a detailed explanation of how your system can re-index documents, at a global level, without programming. The solution should provide for index values to be updated or replaced on multiple documents at once without custom programming or scripting.

7. Does the solution provide a means of purging, with just a few clicks, those index values that are no longer being used (saving database space and optimizing performance)? Explain, if necessary.

Index Value Security (2 Points) Total Points ______
8. Describe validation of attribute values, including data sets, masking, etc.

Classification (3 Points) Total Points ______
9. Describe how the system classifies/categorizes content. Is categorization of content configurable?

10. Does the solution support an unlimited number of document types within the system? Explain, if necessary.

11. Does the solution support the organization of documents into folder-type structures? Explain how this is accomplished.
Document Linking (3 Points) Total Points ______  
12. Does the solution provide an underlying ability to easily pre-define document relationships for use in search and retrieval? Explain, if necessary.

Database (3 Points) Total Points ______  
13. Are there limitations (from a database perspective) regarding how many documents can be stored within the system?

Scalability (2 Points) Total Points ______  
14. Does the system provide scaling-up as well as scaling-out deployment capabilities?

Storage Options (2 Points) Total Points ______  
15. Does the solution allow the archiving of documents to various media, including:  
   - Windows file servers, to allow the leveraging of Share and NTFS permissions  
   - Archiving of documents to Linux file servers  
   - Archiving of documents to Unix file servers  
   - Integrate with IBM Tivoli Storage Management  
   - Integrate with EMC Centera  
   - NetApp  
   - Plasmon Archive Appliances  
   - CD, DVD or Blu-ray

Storage Formats (2 Points) Total Points ______  
16. Does the solution store documents in their original, native file format, not in a proprietary format, so that we are not forced to use your software to access our data? Explain, if necessary.

   17. How many native file formats do you support? For unique file types, explain how you handle storage

Export (2 Points) Total Points ______  
18. Does the solution contain an export tool for massive exporting of content in a non-proprietary format? This should supply both the document and the index values.

Off-line (2 Points) Total Points ______  
19. Do users have the ability to check documents out of the system for access via a localized copy that can be worked on, checked back in, and processed automatically? Explain, if necessary.

Fail-Over/Redundancy (2 Points) Total Points ______  
20. Does the solutions storage architecture allow for documents and images to be stored at one too many different physical locations for the purpose of redundancy? If one of the locations were to have a failure, there would be no interruption of access to the documents. Explain, if necessary.
Security (3 Points) Total Points ______
21. Does the solution have the option to limit access to the storage locations based on service accounts? Explain, if necessary.

Encryption (3 Points) Total Points ______
22. Does the solution provide the ability to encrypt data at the database level and at the file storage level, as well as content that has been backed up/at rest? Explain, if necessary.
H: Configuration (40 Points) Total Points for Section H_______

Administration Interface (12 Points) Total Points ______

1. Does the solution provide an interface for the point and click configuration and administration of all major system components (e.g., import processing, document type configuration, index value configuration, workflow, create rapid no code/low code applications, user groups and rights, storage structure, scanning, records management, foldering, scripting, etc.)? Explain, if necessary.

2. Does the solution allow for ease of configuration, in that most administrative tasks (e.g., adding new document types and index values, user administration, configuring workflows, etc.) can be done by an internal resource as opposed to a third-party software expert? Explain, if necessary.

Configurability Options (10 Points) Total Points ______

3. Quantify the number of configurable options in your solution.

Import Processing (10 Points) Total Points ______

4. Across all of your input/ingestion offerings (e.g., document capture, COLD/ERM, directory imports, document imports, etc.), describe the ease of configuring this content to automatically enter one or many workflow processes upon ingestion.

Workflow Configurability (12 Points) Total Points ______

5. Describe in detail how workflows are designed, created, and the level of scripting or any custom coding that is required. Include any screen shots you feel would help to explain.

6. Describe how business users can modify business processes without having to rely on a system administrator to make the changes. This should also allow for continued, uninterrupted access to the system when changes are made.
I: Database-Hardware (30 Points) Total Points for Section I_____

Database (15 Points) Total Points ______
1. Does the database architecture support multi-vendor platforms, specifically Microsoft SQL and Oracle?

Virtualization (15 Points) Total Points ______
2. Describe your solution’s support for virtualization.
J: Security Administration (40 Points) Total Points for Section J______

Security (8 Points) Total Points ______
1. Describe the depth and breadth of your solutions security methodology (rights and privileges), including system's ability to assign security at each of the following levels:
   - User Groups
   - Users
   - Document Type Groups
   - Document Types
   - Index Values
   - Folders
   - Notes
   - Workflow
   - Import Processors
   - Scan Queues
   - Configuration

Authentication (6 Points) Total Points ______
2. Describe the solution's different security options for logging into the system, allowing the system administrator to decide which option is the best for our company (e.g., using a separate security model for an additional logon and password, NT Authentication, integration with Windows© Active Directory, Novell© Security, or single sign-on authentication).

Encryption (6 Points) Total Points ______
3. Does the solution have the ability to encrypt data at the database level, the file storage level, and content that has been backed up/at rest? Explain, if necessary.

   4. Describe your solution’s ability to publish select content onto removable media (CD / DVD) in an encrypted format, allowing access to a self-contained / runtime version of your client.

   5. Describe your solution’s ability to send documents as an encrypted PDF.

PCI Compliance (6 Points) Total Points ______
6. Describe how your system manages highly-sensitive information (e.g., payment card information), adhering to the PCI compliance standard.

Workflow Administration (5 Points) Total Points ______
7. To accommodate multi-departmental/enterprise deployments involving numerous administrators, explain how your solution segregates workflow administration privileges.
Web Administration (5 Points) Total Points ______
8. Describe the solution's ability for designated users to perform the following administrative tasks via the web-based client:
   • Add new users
   • Change passwords
   • Reset passwords
   • Apply rights to user groups

Licensing Assurance (4 Points) Total Points ______
9. Describe how the solution allows the system administrator to hold a specific number of licenses for different features such as logging into the system, importing documents, or using workflow for specific user groups that must be guaranteed access to these features regardless of who else is logged into the system.
K: Scalability (30 points) Total Points for Section K

Deployment (3 Points) Total Points ______
1. Does the system support ClickOnce deployment to ease the use of installation and configuration updates? Explain, if necessary.

Test Environments (3 Points) Total Points ______
2. Does the solution allow for development, test, and disaster recovery environments with no additional licensing fees? Explain, if necessary.

Expansion (3 Points) Total Points ______
3. After the initial investment, the Township intends to add on additional Departments. Describe how your software could accommodate this growth. Is the software contained in one code base?

Redundancy (3 Points) Total Points ______
4. Does the solution support multiple application and web servers in a load balanced configuration environment for redundancy? Explain, if necessary.

Users (3 Points) Total Points ______
5. Provide examples of scalability using real customer examples and metrics:
   - Peak number of users in a single instance at one time
   - Peak number of retrievals per hour
   - Peak number of documents ingested per day
   - Peak number of documents stored in the ECM repository
   - Is solution licensing based on concurrent users?

Index Values (2 Points) Total Points ______
6. Does the solution support an unlimited number of customer-defined, first class, index value fields per document within one storage structure? These fields should be of various formats, including date, currency, alphanumeric, and numeric. (Second class index value fields would include any additional information stored about a document separate from the primary document index structure.) Explain, if necessary.

7. Does the solution support the ability to store multiple values for the same index value instance (e.g., customer name = John Adams and Sara Adams)? The population of an additional value(s) should be accomplished with a single mouse click or keyboard short cut. Explain, if necessary.

Image Storage (3 Points) Total Points ______
8. Does the solution utilize a file storage system to store documents, as opposed to storing directly into the database? Explain, if necessary.
Batch Processing (2 Points) Total Points ______
9. Describe how your solution supports the ingestion of large volumes of transactions during peak processing timeframes.

Code Base (2 Points) Total Points ______
10. Describe how your solutions architecture supports the addition of features and functionality without having to build connectors between the applications in your suite of products.

Capacity (3 Points) Total Points ______
11. What is the maximum number of documents the solution can hold?

Document Caching (Distributed and Global Deployments) (3 Points) Total Points ______
12. Does the system deliver efficient access to documents over a WAN (distributed and global environments)?
L: Implement/Support (40 Points) Total Points for Section L

Implementation (15 Points) Total Points ______

1. Describe your implementation processes and procedures.
2. Describe the roles and responsibilities the vendor will have during an implementation.
3. Describe the roles and responsibilities the Township will have during an implementation.
4. Provide a sample of the structured project implementation plan utilized.
5. Describe the number of environments (test, production) supported in an implementation of your system and the cost of each.

Technical Support (15 Points) Total Points ______

6. Describe your technical support organization and structure.
7. How many support centers do you operate?
8. What hours is your Technical Support department available?
9. Describe how support issues are logged.
10. Describe the designated support representative that will be assigned.
11. Do you provide a way to check the status of an issue online?
12. Detail your problem escalation procedure.

Software Support (10 Points) Total Points ______

13. When was the first version of your solution released?
14. Describe how consistently new versions of the software are released.
15. Describe how software changes or enhancements are incorporated into a release.
16. Explain how long a release is maintained.
17. Detail the software license costs or upgrade costs typically incurred with an upgrade to a new release.
M: Training (40 Points) Total Points for Section M______

1. Describe the training that is available to the customer’s personnel and if it is available onsite. (10 Points) Total Points ______

2. Do you provide a train-the-trainer technique within your training offerings? (10 Points) Total Points ______

3. Do you provide web-enabled training courses and tutorials? (10 Points) Total Points ______

4. Do you have a website dedicated to training? (10 Points) Total Points ______

5. Do you offer a full array of live, interactive training (including solution certification) via the internet, thus minimizing an end user’s need for travel and additional travel-related expenses for training? (10 Points) Total Points ______

6. Describe subscription-based training services available, providing our organization with on-demand, online training for one price. (10 Points) Total Points ______

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SECTION 4: PROJECT PRICING (300 POINTS)

The Township desires to be able to compare the 5-Year Total Cost of Ownership (TCO) of each vendors solution submission. Because it is the Township’s intention to expand the use of the solution after the initial implementation, the RFP outlines a number of assumptions below to guide in the preparation of the price proposal. Read these assumptions carefully and respond as requested in preparing your cost estimate. Point Totals will be scored according to the Evaluation Criteria section outlined earlier in the RFP document.

If your pricing structure is different from that specified below, and if you believe your structure would result in a lower TCO for the Township you may submit an ALTERNATIVE PRICE PROPOSAL, which must be in addition to the price proposal in the format specified below.

The Township also intends to provide the required server(s), preferably virtualized, and client hardware and software such as Microsoft Office and SQL. However, the Township requests that the vendor outline the specific solution hardware and software architecture requirements for project information in this section.

The Township’s current computer network configuration will be made available to the successful vendor. The current Township Server and Workstation Specifications are outlined in the Table below:
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**Independence Township Server and Workstation Specifications**
1. **Township Provided Estimate of End Users**

In the first year, this is the estimate of end users from the initial Township Department implementation including the Building Department, Clerk’s office, Department of Public Works and Fire Department. In years 2 through 5, the Township intends to expand the use of ECM using its internal resources and provides these estimates of total system users as a basis for estimating pricing.

State pricing in terms of ‘concurrent users’ or ‘named users’. If you wish to use an alternative pricing structure that would be to the benefit of the Township, include that in your ALTERNATE PRICE PROPOSAL, and specify the basis for that pricing.

2. **ECM System Software**

Include all software modules or elements required to meet the requirements specified in this RFP. Include a list of all proposed software modules.

3. **ECM System Software**

Include all API’s or other elements required to meet the requirements specified in this RFP. This should include installation and integration. Include a list of all proposed API’s.

4. **Annual Support, Maintenance and Renewal Fees**

Include all post-implementation costs of any kind including technical support/customer service with unlimited phone technical support for the technical staff. You must specify any and all annual escalation rates/fees in this schedule. Your proposal will represent a fixed guaranteed maximum rate/increment for annual escalation.

5. **Implementation Services**

Must include all costs for the installation of software in Item 2 and any additional costs of all kinds not related directly to the items specified above, including, but not limited to:

1. Customization and configuration necessary to meet the project requirements as outlined in the Project Overview and Objectives section of this RFP.
2. Consulting services necessary to implement the project requirements including the ones outlined in the Project Overview and Objectives section of this RFP.

3. Training services necessary to meet the training requirements outlined in this RFP.

4. Specify any other costs not included in prior items.
**SECTION 5: RFP SCORING SUMMARY**

<table>
<thead>
<tr>
<th>SOLUTION VENDOR NAME</th>
<th>PASS (Y/N)</th>
<th>MANDATORY PASS/FAIL COMPLIANCE</th>
<th>POINTS</th>
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<tbody>
<tr>
<td>SECTION 1: VENDOR SOLUTION INFORMATION</td>
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<tr>
<td>SECTION 2: PROJECT PERSONNEL</td>
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<td>SECTION 3: FUNCTIONAL REQUIREMENTS</td>
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<td>SECTION 4: PROJECT PRICING</td>
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<td>TOTAL # of POINTS</td>
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