



ADDENDUM NUMBER 3

November 28, 2018

RFP No. 2018-100_Electronic Document Management/Workflow Software

**Fort Worth Housing Solutions
Procurement Department
300 South Beach Street
Fort Worth, TX 76105**

Note: The proposals are received but not publicly opened.

Receipt of this Addendum is to be acknowledged by the Respondent by signing, dating and submitting with the proposal. Failure to do so may render the proposal non-responsive.

The following revisions, clarifications, additions and/or deletions are included in this Addendum No. 3 to the subject RFP and are to be fully incorporated into each respondent's submission for work solicited therein.

Respondent acknowledges receipt of Addendum: _____

QUESTION 1:

What is the total number of users required?

FWHS RESPONSE 1:

110 Users

QUESTION 2:

What is the resolution requirement for image output? Ex: 200 DPI, 300 DPI

FWHS RESPONSE 2:

Standard 200DPI



**QUESTION 3:**

How many concurrent users will use the ECM system?

FWHS RESPONSE 3:

Seventy-Five (75)

QUESTION 4:

Estimated number of users who would have access to the hosted repository to access Documents?

FWHS RESPONSE 4:

Seventy-Five (75)

QUESTION 5:

Do you plan on using Document Generation capabilities? If so, how many templates would you like to automate?

FWHS RESPONSE 5:

Yes, at least 10 to start, however based upon agency needs that number could change.

QUESTION 6:

How many workflows would you like to automate? Can you foresee how many different processes you want to set up?

FWHS RESPONSE 6:

Yes, at least 10 to start, however based upon agency needs that number could change.

QUESTION 7:

If you are leaning toward the cloud-based option, do you know what your storage requirements are for the system? The on premise solution doesn't have any inherent storage limitations; you are only limited by your server storage space.

FWHS RESPONSE 7:

FWHS utilizes a cloud-hosted VDI+Server platform where this Document Management app will be hosted. Cloud storage is easily expandable depending on demand.

QUESTION 8:

What is the business system used by the FWHS?



**FWHS RESPONSE 8:**

Emphasys/Elite

QUESTION 9:

One of the requirements of the FWHS is Remote / Cloud Access – Does the FWHS prefer to host this Document Management system on premise or in the cloud? If the desire is to host on premise are you all using Citrix or another RDP application for remote access?

FWHS RESPONSE 9:

FWHS utilizes a cloud-hosted VDI+Server platform where this Document Management app will be hosted. We utilize Citrix for remote access to our entire environment. We can deploy a new server VM to host the Document Management application into this environment.

QUESTION 10:

Can you give any example of the workflows or templates that we will be creating? (to help us determine complexity and how long it may take)

FWHS RESPONSE 10:

We have none. This is a new venture. I foresee payroll leave forms, approval forms. We are seeking industry standards to move forward.

QUESTION 11:

What email system is used by the FWHS?

FWHS RESPONSE 11:

Microsoft Exchange 2016, with the mail client of Outlook 2016

QUESTION 12:

For digital signatures, are you looking for integration with DocuSign, or an approval with validation, or Adobe signature?

FWHS RESPONSE 12:

FWHS is open to the current industry standards or trends. All of those options are sufficient for the Agency business needs.

QUESTION 13:

What server operating systems are you using?



**FWHS RESPONSE 13:**

Microsoft 2016 Server

QUESTION 14:

Do you have a data migration work, if yes then how much data do you have currently?

FWHS RESPONSE 14:

No

QUESTION 15:

Do we need to provide Scanning cost?

FWHS RESPONSE 15:

Yes, provide the scanning services as a separate quote/cost.

QUESTION 16:

What type of help desk are you wanting? 24/7 phone number? Business hours?

FWHS RESPONSE 16:

Normal Business Hours are from 8:00 a.m. to 4:30 p.m., subject to change during the summer months

QUESTION 17:

Any other type of supplemental support? Email? Self-help portal?

FWHS RESPONSE 17:

Self-help portal and Email

QUESTION 18:

Is city open to some of the work (e.g. development, testing) being done at offsite? Is the entire work to be done only onsite or can the flexible portions of work be carried out remotely?

FWHS RESPONSE 18:

Fort Worth Housing Solutions is a separate entity from the city. Offsite scanning is acceptable, However, flexible portions of work can be carried out remotely upon approval.



**QUESTION 19:**

Is there any expected timeframe within which you would like this system to go-live?

FWHS RESPONSE 19:

The First Quarter of 2019, if possible, or thereafter to meet agency business needs

QUESTION 20:

Are you looking for specific analytical reports or any Dashboard view in DMS?

FWHS RESPONSE 20:

Yes, FWHS is constantly analyzing data. A report writer and a dashboard are essential to meet the agency reporting needs.

QUESTION 21:

Can you please provide us a pricing format to enable us to give you pricing as per your requirement or Shall we prepare it ourselves?

FWHS RESPONSE 21:

Prepare it yourself and include a breakdown of your cost and any additional costs that may be deemed necessary or for consideration regarding business needs for FWHS

QUESTION 22:

It was stated that not all users at FWHS need full access to the ECM solution. Please define how many users are needed in the following categories:

- a. Full User Add New documents, Add/Modify Metadata, Participate in Workflows, and Submit/Participate in Electronic Forms?
 - b. Retrieve Documents, Add/Modify Metadata via an Electronic Form, Participate in Workflows, and Submit/Participate in Electronic Forms?
-

FWHS RESPONSE 22:

A) 75 full users B) 35 retrievals only

QUESTION 23:

You stated you are looking at a Cloud based solution. Please clarify if you are looking for an Annual subscription fee rather than cash purchase?

FWHS RESPONSE 23:

Annual Subscription Fee



**QUESTION 24:**

You stated you wanted concurrent licensing. If a vendor provides non-current licensing for all users do they receive addition points since the concurrent license model could leave users without guaranteed access?

FWHS RESPONSE 24:

Please Provide Concurrent and Non Concurrent licensing fees, which will allow for a fair evaluation.

QUESTION 25:

Which Document Management systems have FWHS demonstrated in the 12 months?

FWHS RESPONSE 25:

This is a new process and has never been done by the agency.

QUESTION 26:

How many user's licenses?

FWHS RESPONSE 26:

Seventy-Five (75)

QUESTION 27:

How many viewing licenses?

FWHS RESPONSE 27:

Thirty-Five (35)

QUESTION 28:

Page 10 Question 19 clarification of the seat/ concurrencies requirements?

FWHS RESPONSE 28:

Please Provide Concurrent and Non Concurrent licensing fees, which will allow for a fair evaluation.

QUESTION 29:

How many clients/ concurrencies initially for RFP pricing section?

FWHS RESPONSE 29:

Seventy-Five (75)



**QUESTION 30:**

Site visit schedule for scanning?

FWHS RESPONSE 30:

See Addendum 1

QUESTION 31:

How many document types are there?

FWHS RESPONSE 31:

Paper and Electronic

QUESTION 32:

What is the index information required and how many fields?

FWHS RESPONSE 32:

Industry Standard such a Name, Address, Phone, SNN and so forth. FWHS has various document types. It depends on the document to be indexed.

QUESTION 33:

Where is the index information located?

FWHS RESPONSE 33:

On existing files, they are located on the file folder stored in the physical file storage system.

QUESTION 34:

Are there a lot of Staples/paperclips?

FWHS RESPONSE:

Yes

QUESTION 35:

Are there a lot of tape downs?

FWHS RESPONSE 35:

No



**QUESTION 36:**

Are there any color photographs?

FWHS RESPONSE 36:

No

QUESTION 37:

Average document size?

FWHS RESPONSE 37:

8 ½ x 11

QUESTION 38:

Total boxes or inches measured to get a sense for how many images there are?

FWHS RESPONSE 38:

The site visits were meant to answer this question however, we estimate 500,000 paper documents in storage.

QUESTION 39:

Do they have a preference for all black and white color Grayscale?

FWHS RESPONSE 39:

No preference, overall it will be a combination of all of the above

QUESTION 40:

Do they have a preference for PDFs or Tiffs?

FWHS RESPONSE 40:

PDF's

QUESTION 41:

What do they typically scan in dpi?

FWHS RESPONSE 41:

200 DPI



**QUESTION 42:**

What is the quality level of review needed 100%, page to screen verification?

FWHS RESPONSE 42:

100%

QUESTION 43:

How much space is available if it's an on-site project?

FWHS RESPONSE 43:

To be determined based upon needs and available space needed

QUESTION 44:

What's the final disposition of the boxes once they have been scanned?

FWHS RESPONSE 44:

Most will be destroyed, it may be determined that a select group must be maintained for future reference.

QUESTION 45:

Is FWHS expecting vendors to include in their RFP proposal a solution overview and price estimates for an Electronic Document Management System and Workflow Solutions outside of the "primary focus" of tenant processes, which include:

- Accounts Payable
- Contract Administration
- Procurement
- Human Resources
- other "back office" processes

Section I Introduction, page 4

Section II A.1.b ("FWHS initially plans . . ."), page 5 - 6

FWHS RESPONSE 45:

Yes, FWHS intends to use the proposed system agency wide to go as paperless as possible

QUESTION 46:

Continuation from Q45: If vendors are required to include a solution overview and price estimates in their proposal for "other 'back office' processes," please provide details, including scope and requirements by each department, similar to the details provided in "Section II, A.3 Documents" for the Housing Choice Voucher Program, Property Management, and Finance departments (Section II, A.3 Documents, page 6 – 7). For example:





1. AP:

- Shall the solution include back file scanning services and/or electronic import services from another system into the new system?
- Shall the solution include scanning and import of new invoices received?
- Shall the solution include an automated workflow process for each step of the AP process; including an AP Clerk Review, PO Matching, Approval Processes, Exception Handling, Voucher Creation with Integration to the AP system, etc?

2. Contract Administration:

- Shall the solution include back file scanning services and/or electronic import services from another system into the new system?
- Shall the solution include scanning and import of new contracts?
- Shall the solution manage and include an automated workflow process throughout the stages of a contracts life cycle, including Review Request & Triage, Contract Drafting, Negotiation, Signing, Activation, Expiration and Renewals?

3. HR:

- Shall the solution include back file scanning services and/or electronic import services from another system into the new system?
- Shall the solution include scanning, imports and workflow processes for new HR employee documents, such as, employee onboarding and employee file management?

FWHS RESPONSE 46:

Yes, to all the questions. FWHS intends to use the proposed system agency wide to go as paperless as possible

QUESTION 47:

How many offsite locations and offices will need to scan? Section II, A.2 (Current Environment). d.ii (Remote Sites), page 6

FWHS RESPONSE 47:

FWHS Administrative Building and the Beach Street Offices are the office locations at this time.

QUESTION 48:

Is FWHS able to provide any workflow process diagrams for the Housing programs and the different interactions with the back office areas that shall be included as in-scope of the RFP requirements? Section: General

FWHS RESPONSE 48:

There are none to provide at this time. FWHS shall partner with the awarded vendor to create a workflow process for future business needs of the agency.



**QUESTION 49:**

Section II, A.2 (Current Environment). d., page 6

Please provide the number of users per each group within the Administrative Offices (6) and Remote Sites (3) for each:

1. How many users will need access to the system "all of the time" to access documents?
2. How many users will need access to the system "some of the time" to access documents?
3. How many users will need access to the system "all of the time" to work and advance documents to the next step of a workflow process?
4. How many users will need access to the system "some of the time" to take action on a document within a workflow process, such as Approve / Deny?

FWHS RESPONSE 49:

Seventy-five (75) users all of the time, thirty-five (35) users read only

QUESTION 50:

Section II, A.2 (Current Environment).a., page 6

1. What Cloud Environment (i.e. Azure, AWS) is the infrastructure currently hosted in?
2. Is the expectation for the new FWHS Electronic Document Management System and Workflow solution to continue to reside in your current Cloud environment?
3. Shall the vendor's proposal include vendor hosted Cloud Hosting and Service Class (vendor hosted) options?

FWHS RESPONSE 50:

1. FWHS infrastructure is hosted in a Private Cloud environment, operated and maintained by Vintage IT Services (MSP).
2. Yes, this would be ideal for current and future integrations, as well as compatibility with our hosted VDI infrastructure.
3. Preference would be to have the application hosted with our existing infrastructure.

QUESTION 51:

Section II, A.1.h, page 5

Other than Emphasys is there any other integrations required?

FWHS RESPONSE 51:

Adobe and Microsoft Office



**QUESTION 52:**

Section II, A.1.b, page 5

Do you have Records Retention guidelines? If so, please provide them?

FWHS RESPONSE 52:

The Records retention policy is currently being revised and cannot be provided at this time.

QUESTION 53:

Section II, A.3 (Documents), pages 6 - 7

As far as backfile, should the proposal include scanning services for existing paper files and are there also electronic files which need to be converted?

FWHS RESPONSE 53:

FWHS does have electronic files that should be included but they are not back files. Provide the scanning services as a separate quote/cost.

QUESTION 54:

Section II, A.1.b, page 5

Does desk-side electronic signature capture include an external device, such a Topaz signature pad?

FWHS RESPONSE 54:

Yes, that should be an option

QUESTION 55:

Section II, A.5.19, page 10

1. How many concurrent client licenses shall be included?
 2. Does the number of concurrent client license account for all users that by department/group that will access the system; please reference to Q5.
 3. Will FWHS consider a hybrid client license model; a mix of concurrent and named?
-

FWHS RESPONSE 55:

Price concurrent at Seventy-Five (75) users and One Hundred-Ten (110) per seat licenses separate. This will allow for a fair breakdown



QUESTION 56:

Section II, A.5.32, page 11

Please provide details of scope for electronic file migration from the current system; similar to the details provided in section 3 for the back file physical document scanning to the new system.

FWHS RESPONSE 56:

Electronic files are mostly PDF format. Files need to be indexed and included as applicable.

QUESTION 57:

Section II, A.5.32, page 11

Continuation from Q12 - If electronic file migration is in scope, please answer the following questions:

- How large is the database in GB, broken down by data volume (case management data, etc.) and document/file volume?
- Total number of documents to be converted?
- Total number of files to be converted?
- What are the file types stored, examples (.tif, .pdf, .docx)?
- Does the current system store any documents with a proprietary file format?
- How large is the current file store (GB) for all the document files stored in the repository?
- Are file paths stored in clear text in the database or does the database obfuscate or encrypt the file paths?
- Are notes or annotations to be converted?
- Do document renditions or versions need to be converted?
- Can the document files be opened directly from the file share using standard viewers, examples (MS Word, Adobe PDF Viewer, MS Paint, MS Excel)?
- Are the document files compressed or zipped?
- Are the document files encrypted?
- Product Name and version?
- Product vendor?
- Database platform?
- Do any COLD (Computer Output to Laser Disk) documents need to be converted?

FWHS RESPONSE 57:

This existing files are ALL in paper format with the exception of a few in PDF, Word, Excel format.

QUESTION 58:

Section IV, A.4 (Desired System Functionality List).1 (Document Imaging and Capture).b, page 16

1. What system does FWHS currently utilize for capture that would require the ability for the new system to integrate with?
2. Is integration with leading capture system a requirement?
3. Will FWHS consider a vendor proposed capture system?





FWHS RESPONSE 58:

We have a few Xerox MFPs . FWHS is open to explore other options. Please provide a vendor proposed capture system in your proposal if applicable.

QUESTION 59:

Section IV, A.4 (Desired System Functionality List).6 (Search).a, page 17

1. Does FWHS require browser based web server only with a zero foot print install (i.e. HTML vs. Active X install)
 2. Will FWHS consider a local install of the client software with various deployment options, which include .msi or Microsoft Click-Once?
-

FWHS RESPONSE 59:

FWHS is open to any solution that will work in our VDI environment. As long as the .msi or MS Click-Once application is compatible with Citrix XenDesktop 7.x, we can consider a local install of the client software

QUESTION 60:

Section IV, A.4 (Desired System Functionality List).7 (Integration with Existing Systems/Applications).b, page 18

Please provide a use case of the type of integration FWHS is expecting to achieve?
For Example:

1. To lookup metadata value, such as Voucher ID, First Name and Last Name to automatically index additional metadata values?
 2. The new system will automatically update the status in Elite throughout each step of the workflow process in the new system?
 3. Both, or additional requirements?
-

FWHS RESPONSE 60:

FWHS would like to have both

QUESTION 61:

Please describe the 10% retention factor mentioned in item 31. Is this 10% withheld until completion or 10% paid up front before completion?

FWHS RESPONSE 61:

Yes, 10% is withheld until completion.



**QUESTION 62:**

Does FWHS employ a data analysis that supports Emphasys data base or any other data bases?

FWHS RESPONSE 62:

No, the current IT staff consists of two staffers that are responsible for all electronic device support. IT does generate reports out of the SQL Database but there is not an analyst on staff

QUESTION 63:

Will Emphasys provide data base table structure information?

FWHS RESPONSE 63:

Yes, that will be provided to the awarded vendor.

QUESTION 64:

Will FWHS initiate and facilitate the communication between Emphasys and the awarded vendor?

FWHS RESPONSE 64:

Yes

QUESTION 65:

Does Emphasys host your system?

FWHS RESPONSE 65:

Emphasys Elite is hosted in our Private Cloud environment, along with other servers, applications, and Citrix VDI instances.

QUESTION 66:

Will your host provider create new VM's to host the new Document Management system?

FWHS RESPONSE 66:

Depending on the overall solution it is possible. FWHS desires a solution that is engineered to work at optimal performance, whether that be in our cloud environment or the vendors.

QUESTION 67:

If not hosted, Will FWHS purchase the Server(s)? Or is it expected that the awarded vendor provide the servers?



**FWHS RESPONSE 67:**

If not hosted, FWHS will deploy new Server VMs in our Private Cloud environment to host this application.

QUESTION 68:

Do you want the awarded vendor to host the system or will FWHS assign the existing host provider?

FWHS RESPONSE 68:

FWHS is open is the best solution available based upon the business needs of the agency however, if not hosted, FWHS will deploy new Server VMs in our Private Cloud environment to host this application.

QUESTION 69:

Does FWHS use Tableau or any other Business Intelligence platforms?

FWHS RESPONSE 69:

No

QUESTION 70:

Item 32 & 33 mention existing system. What system is being referred? What is the name of the system?

FWHS RESPONSE 70:

Emphasys Elite, various MFPs and current electronic PDF's and so forth.

QUESTION 71:

Section 6 mentions “telephone units, Call Center Capability, and Interactive Voice Response” please describe how this section will apply to the Document Management workflow.

FWHS RESPONSE 71:

For clarity, can the system be integrated with an IVR system, so clients can pull information via the phone system? Can it be integrated with a VoIP phone system?

QUESTION 72:

Is it the expectation of FWHS for the DMS auto create the “document packets” and send to a printer?

FWHS RESPONSE 72:

Yes, FWHS desires to have that functionality as an option.



**QUESTION 73:**

What is the full name of the FWHS internal system?

FWHS RESPONSE 73:

Emphasys Elite

QUESTION 74:

Are you looking for cloud-hosted solutions and on premise?

FWHS RESPONSE 74:

A solution that integrates best with our cloud-hosted Citrix VDI and application servers is ideal.

QUESTION 75:

Do you want to manually index the document types with an option to be performed automatically?

FWHS RESPONSE 75:

FWHS would like review all available options in your proposal

QUESTION 76:

What format is the current documents stored?

FWHS RESPONSE 76:

PDF, Word, Excel, and paper.

QUESTION 77:

Exhibit C and all items related to M/WBE: Is awarded contractor required to contract work with certified M/WBE?

FWHS RESPONSE 77:

Here are two links where you can find M/WBE firms in Texas:

<https://comptroller.texas.gov/purchasing/vendor/hub/>

http://www.nctrca.org/index.php?option=com_content&view=article&id=49&Itemid=62

QUESTION 78:

Will or can FWHS provide a list of M/WBE for vendors to reach out to become compliant with the good faith effort criteria?



**FWHS RESPONSE 78:**

See response 77 above please.

QUESTION 79:

Is the Equal Employment Opportunity Form (Attachment C) required only for primary contractor or is it required for sub-contractors as well?

FWHS RESPONSE 79:

Primary Contractor who is submitting a proposal

QUESTION 80:

How many concurrent users?

FWHS RESPONSE 80:

Seventy-Five (75)

QUESTION 81:

How many users will need administrative rights and privileges in the new solution?

FWHS RESPONSE 81:

Ten (10)

QUESTION 82:

How many users will need read-only capability?

FWHS RESPONSE 82:

Thirty-Five (35)

QUESTION 83:

Do you prefer an on premise or cloud-based solution?

FWHS RESPONSE 83:

A solution that integrates best with our cloud-hosted Citrix VDI and application servers is ideal.

QUESTION 84:

Will there be an opportunity to test integration capability to ECS Elite?



**FWHS RESPONSE 84:**

Selected finalist(s) may be provided an opportunity to test integration capability to ECS Elite upon request.

QUESTION 85:

Besides ECS Elite, what other core business applications will the document management solution need to integrate with?

FWHS RESPONSE 85:

Microsoft Office, Adobe Suites

QUESTION 86:

Will you provide retention and destruction schedules for the records?

FWHS RESPONSE 86:

Our retention policy is being revised. The proposed system needs to have the ability to modify the schedules as needed.

QUESTION 87:

Will the backlog scanning be included in this first phase of this project?

FWHS RESPONSE 87:

The backlog scanning should be quoted as its own line item(s).

QUESTION 88:

Are there any documents that need to be migrated to the new solution?

FWHS RESPONSE 88:

PDF's and MS Office files may be migrated.

QUESTION 89:

How many total pages to be scanned?

FWHS RESPONSE 89:

General estimation of 250,000 pages up to 500,000 pages.



**QUESTION 90:**

How many forms will need to be in an electronic format?

FWHS RESPONSE 90:

FWHS would like to have all of its forms in electronic format however, the exact number of total forms is unknown at this time. For cost proposal estimation please provide an average cost per form., Any multiple form creation discounts such as any type of bundling discounts.

QUESTION 91:

Section, General

With Cost being a part of the Selection Criteria, will FWHS share the budget estimate for this procurement e.g. Approved Steering Committee Notes, Published Agendas identifying budget, etc.?

FWHS RESPONSE 91:

FWHS Budget estimate(s) is for internal purposes only.

QUESTION 92:

Section, General

Can you share a 5 Year Total Cost Estimate?

FWHS RESPONSE 92:

No, See response no. 91 also

QUESTION 93:

Section, General

Has FWHS officially allocated and / or assigned funding to the Electronic Document Management / Workflow Software related project?

FWHS RESPONSE 93:

Yes

QUESTION 94:

Section, General

Assuming FWHS receives a proposal(s) that score positively against the selection criteria, will FWHS absolutely make an award?





FWHS RESPONSE 94:

Proposals will be evaluated and scored based on criteria as listed in the RFP. Also see V. Section 2 of the RFP.

QUESTION 95:

Section, General

Has FWHS exhausted all 'internal' or non-RFP options for an Electronic Document Management / Workflow Software and is absolutely certain in the decision to solicit responses from the vendor community? Can FWHS confirm that the Emphasys Computer Solutions product and / or additional products from that vendor does not meet the needs of the RFP?

FWHS RESPONSE 95:

FWHS desires to explore all options with a competitive process by soliciting responses from qualified service providers. Emphasys does have a product that will work with the Elite product line however, it does not meet the business needs of all FWHS departments.

QUESTION 96:

Section, General

Please provide a list of the what vendor and / or solutions the FWHS Electronic Document Management / Workflow Software selection committee has reviewed or received in the past year?

FWHS RESPONSE 96:

There have been none. This is a service for the agency.

QUESTION 97:

Section, General

Please confirm yes or no, does FWHS have an existing implementation of any type of Electronic Document Management / Workflow Software? If yes, who is the vendor and the product?

FWHS RESPONSE 97:

No

QUESTION 98:

Section, Scope of Services- Overview: d. Imaging i. Document Recognition, Page #5

Can FWHS provide additional detail / business requirements for what the scope of Document Recognition means to FWHS?





FWHS RESPONSE 98:

Bar coding and field recognition

QUESTION 99:

Section, Scope of Services. Overview h. Integration with our Housing Authority Management System, Page #5

1. Is the Emphasys Computer Solutions integration a required task to be completed by the awarded vendor with the initial contract award?
 - a. If so, what is the FWHS owned specific version of the software application?
 2. Can it consume web services? Is there an API?
 3. What is the backend database technology for the Emphasys Computer Solutions?
 4. Will the Emphasys Computer Solutions existing vendors have **FWHS funded tasks** for participation in the Electronic Document Management / Workflow Software project?
 5. Is the Emphasys Computer Solutions hosted locally by FWHS or hosted by the vendor?
-

FWHS RESPONSE 99:

Yes, Elite 1.9.3, SQL Database, it depends on the proposed solution, Elite is hosted by Vintage IT located in Austin, Texas

QUESTION 100:

Section II. Scope of Services, 1. Current Environment, d. Users Page #6

1. What is the total amount of users required for the initial implementation?
 2. How many should be concurrent users? How many should be standard named users?
 - a. Of these identified users how many will require just normal business training and how many exactly will required administration training?
-

FWHS RESPONSE 100:

- 1) 110 Total Users 2) 75 Concurrent Users 3) 10 Administration User Training
-

QUESTION 101:

Section, II. Scope of Services, 3. Documents, Page #6

Is FWHS asking for vendors to provide actual scanning / back-file digitization services for the 'documents stored on and off site'? Or just provide capture software to FWHS?

If yes to provide actual scanning / back-file digitization services, please answer the following:

1. How many total physical pieces of paper do you want scanned?
2. What is the most common age range of the paper e.g. 1-3 years old, greater than 20 years, etc.?
3. Will the paper required disassembly to scan e.g. paper clip removal, staples, hole punches, etc.?
4. Will you require the paper to be re-assembled once scanned?
5. On average, how many metadata fields will be required **per document type**?
6. Does FWHS have space available to accommodate a temporary scan shop provided by the awarded vendor?





If yes to provide capture software as a stand-alone product or in addition to vendor scanning services, please answer the following:

1. How many total **images (1 piece of paper has front and back, if back is captured then count is 2 images)** does FWHS envision capturing in a given calendar year?

FWHS RESPONSE 101:

Capture software with an option for back file digitization, Back file digitization is not a requirement. FWHS desires to have designated staffers trained to perform backfile scanning.

Part 1

1. 250,000 to 500,00 pieces of paper
2. 1 to 5 years of age with some being older than 10
3. Yes
4. No
5. 10 to 20
6. No

Part 2

1. Approximately 1/16th
2. Yes

QUESTION 102:

Section, II. Scope of Services, Documents 5, Requirements 7, Direct Access to Documents, Page #8

Who is FWHS expecting to handle the actual ‘hands-on-the-keyboard’ customizations, web parts, code development, etc. of the Emphasys Computer Solutions to accommodate the requirement of ‘displaying the image’ inside the application? Is it the Electronic Document Management / Workflow Software award vendor or the Emphasys vendor?

(The cost difference between providing documentation and verbal support for integrations is much greater than actually doing the integration, so we want to price our proposal accordingly.)

FWHS RESPONSE 102:

The Electronic Document Management / Workflow Software awarded vendor.

QUESTION 103:

Section, II. Scope of Services, Documents 5, Requirements 14, Directly into the Document Management System Page #10

Can FWHS provide additional detail / business requirements for what the scope of “directly into the Document Management System” to FWHS? Will the ability to manually upload any file format in the system suffice?



FWHS RESPONSE 103:

The ability to manually upload any windows based file format will suffice. Such as MS Word, Excel, and Adobe PDF.

QUESTION 104:

Section, II. Scope of Services, Documents 5, Requirements 20, Testing Purposes Page #10

Does the term “testing purposes” indicate you would like to have multiple environments (Dev, Test, Prod)? Or do you just need an extra generic user license to the Prod system?

FWHS RESPONSE 104:

An extra generic user license to the Prod system is sufficient. There is no need to create a “testing “ environment.

QUESTION 105:

Section, II. Scope of Services, Documents, 5. Requirements 23, Desk-side electronic signature capture Page #10

Can FWHS provide additional detail / business requirements for what the scope of “desk-side electronic signature capture” mean to FWHS? Does FWHS have an existing e-signature technology like Adobe e-signature?

FWHS RESPONSE 105:

An industry standard signature device and an e signature process. FWHS does use Adobe e signature on a limited basis.

QUESTION 106:

Section, II. Scope of Services Documents 5. Requirements 20. Installation / Conversion Page #11

What does “Conversion” mean to FWHS? Are there existing files to convert and migrate? What system do the files currently reside in? What technology is the existing system?

FWHS RESPONSE 106:

Converting electronic documents in PDF or Microsoft Office product format into the proposed system. Most of the existing files are in paper format.

QUESTION 107:

Section, II. Scope of Services, Documents, 5. Requirements, 26. Budget Hours and Cost Page #11

Should we interpret FWHS is willing to entertain proposals that are time and materials based? Or does FWHS only want fixed-fee?



**FWHS RESPONSE 107:**

A firm fixed fee

QUESTION 108:

Section, II. Scope of Services, Documents, 5. Requirements, 32. Existing System Page #11

Can FWHS provide additional detail / business requirements for what the scope of “details about how data from the existing system will be converted into the proposed system”? Is there another system besides Emphasys Computer Solutions? Does FWHS envision the proposed solution to replace Emphasys Computer Solutions?

FWHS RESPONSE 108:

What is the process for taking the existing electronic PDFs, Office products into the proposed system Such as field information for indexing and so forth? Emphasys Elite is composed of a turnkey software solution that handles AP, HR, Procurement and so forth. The proposed solution is not intended to replace any Emphasys Elite products.

QUESTION 109:

Section, II. Scope of Services, Documents, 5. Requirements, 47. Electronic File Documentation, Page #12

1. Can FWHS provide additional detail / business requirements for what the scope of “Electronic File Documentation”?
 - a. Do you mean user and admin guides?
-

FWHS RESPONSE 109:

FWHS desires to be informed of all capabilities a proposed system can provide. This will assist in understanding how the proposed system can be enhanced or expanded to meet unforeseen future needs.

QUESTION 110:

Section, IV. Submission Procedures & Requirements, Information Required in the Proposal, 1. Document Imaging and Capture, d. Image enhancement feature, Page #16

Can FWHS provide additional detail / business requirements for what the scope of “image enhancement feature”?

FWHS RESPONSE 110:

Provide in the proposal all image enhancement features contained within the proposed solution.



**QUESTION 111:**

Section, IV. Submission Procedures & Requirements, A. Information Required in the Proposal, 1. Document Imaging and Capture, e. Leading Capture System, Page #16

1. Does FWHS have an existing capture system for documents?
 - a. If yes, what is the product and version?

FWHS RESPONSE 111:

No, FWHS currently uses MFPs to scan selected files which are stored on a server in specific folders.

QUESTION 112:

Section, 6. Cost Proposal, Page #21

“Include roles, hourly rates and number of hours for each individual that will work on the project. Any hourly or daily rates applicable to the project must not be increased during the duration of the project.”

Can FWHS provide reasoning for this request? Are you willing to entertain a time and materials not to exceed max rate proposal?

FWHS RESPONSE 112:

FWHS desires to minimize unforeseen costs for this project. No, FWHS would like fees to be a firm fixed rate.

QUESTION 113:

Section, Cost Proposal, f. Telephone units, Page #21

What does FWHS mean by telephone units, call center capability, and interactive voice response?

FWHS RESPONSE 113:

Provide any information and if the proposed system has the capability to work with a VoIP phone system. For clarity, can the system be integrated with an IVR system, so clients can pull information via the phone system? Can it be integrated with a VoIP phone system?

QUESTION 114:

Section, General

1. What is FWHS preferred hosting solutions?
2. Is a completely SaaS option acceptable?

**FWHS RESPONSE 114:**

- 1) A solution that integrates best with the FWHS cloud-hosted Citrix VDI and application servers is preferred.
 - 2) SAAS is an acceptable option
-

QUESTION 115:

Section, General

1. Please confirm yes or no, does FWHS have an existing implementation of any type of Imaging Capture Software?
 - a. If yes, who is the vendor and the product?
-

FWHS RESPONSE 115:

No

QUESTION 116:

Page 10 Item 16 – “where the User connected from”

Please further define. Does FWHS mean actual Geo Location, client (thick or thin), or the actual computer logged in from.

FWHS RESPONSE 116:

Actual computer logged in from/ IP Address

QUESTION 117:

Page 13 – A. viii. a.

What kind of Warranty is FWHS expecting?

FWHS RESPONSE 117:

Please provide any applicable warranty information with your proposal such as a warranty covering implementation services and hardware/software.

QUESTION 118:

Page 14 E. Second Paragraph “Title to hardware”

1. If the solution is cloud based through a SAAS model, what are FWHS Expectation?
2. Does this include owning the hardware?
3. Does the hardware have to be located on FWHS premises?





4. Does FWHS already have the server hardware allocated for this project or is the respondent to include server equipment for the solution?
5. Does FWHS have a preference on licensing model?

FWHS RESPONSE 118:

- 1.A solution that integrates best with our cloud-hosted Citrix VDI and application servers is preferred.
2. Yes
3. No
4. FWHS will not allocate servers in the cloud environment until the system requirements for the proposed system has been revealed.
5. No

QUESTION 119:

Page 21 – Tab 6, section f

Can you provide further definition to the separately priced items?

FWHS RESPONSE 119:

Provide any information and if the proposed system has the capability to work with a VoIP phone system. For clarity, can the system be integrated with an IVR system, so clients can pull information via the phone system? Can it be integrated with a VoIP phone system?

QUESTION 120:

There is reference to migration or data conversion or scanning of paper files. There is no mention of the existing location or solution to migrate from.

1. Is FWHS expecting such services to be included in the respondent's bid?
 - a. If so, please provide additional information on the existing location and solution that must be migrated from.

FWHS RESPONSE 120:

FWHS has paper files located at the Administrative Building 1201 East 13th St. and 300 S Beach St.

QUESTION 121:

FWHS mentions that 85% of documents relate to tenant processing.

1. Can you provide more detail to include the method (manually in paper, email, etc), and the number of approvals/approvers or steps from start to finish for this process?

**FWHS RESPONSE 121:**

The tenants are processed through the Emphasys Elite software, then paper files are generated from Elite such as letters, rent change notices and various inspection forms. The number of approvers can vary based on a case by case basis depending on where the tenant/ client is in the process. This could be as little as one and can be elevated from there depending on circumstances.

QUESTION 122:

Does FWHS currently have a Office365 Subscription for all users that includes Sharepoint?

FWHS RESPONSE 122:

FWHS is currently utilizing Office 2016 located on a private cloud server. We do not currently utilize Sharepoint.

QUESTION 123:

Is the FWHS opposed to using SharePoint with the appropriate plug-ins and configuration as a possible solution to this RFP?

FWHS RESPONSE 123:

FWHS is open to all possible solutions

QUESTION 124:

Please describe what a packet is composed of and how it must be created

FWHS RESPONSE 124:

An example packet for the first issuance of voucher briefing packet is composed of 18 pages and include:

- *Affidavit of Briefing
- *Notification of Rights and obligations
- *Exceptions to Minimum Rent/Hardship Exemptions
- *Photo and Multimedia Release Form
- * ReliaCard Enrollment Form

These Documents are generated from both Elite, MS Word and Adobe Acrobat.

QUESTION 125:

How many users do you expect to need access to the system and are there some that shouldn't share a concurrent license?

FWHS RESPONSE 125:

110 seats should be priced separately and 75 Concurrent users should be prices separately. This will demonstrate the different options and give FWHS the ability to provide a fair evaluation.



**QUESTION 126:**

How many desk-side electronic signature capture devices are necessary?

FWHS RESPONSE 126:

At least two (2) However, this count is subject to change based upon business needs.

QUESTION 127:

1. Is there a requirement to convert existing or legacy electronic content and what are the training requirements?
 - a. System admin, end user?
-

FWHS RESPONSE 127:

- 1) There is no requirement to convert existing or legacy electronic content.
 - a. All users should be trained accordingly based upon end user access rights.
-

QUESTION 128:

How much historical data must be migrated (answer in GB's) and what is the system it currently resides in?

FWHS RESPONSE 128:

The historical data is currently in paper/hard copy format and cannot be measured in GB's. Paper File storage system.

QUESTION 129:

What is the existing system?

FWHS RESPONSE 129:

FWHS does not have an existing document imaging system. The electronic files are generated from Emphasys Elite Software or in Microsoft Office product format or in Adobe format.

QUESTION 130:

What and how is the history is stored in the existing system?

FWHS RESPONSE 130:

Paper file storage nothing is in electronic format other than Microsoft Office product format or Adobe format.

QUESTION 131:

Is there a database of what the content is the cabinet system?



FWHS RESPONSE 131:

Yes, there is a bar code system located on the individual file folders corresponding to each client.

QUESTION 132:

Can FWHS provide a copy of database to winning bid respondent for validation/performance of indexing?

FWHS RESPONSE 132:

Yes

QUESTION 133:

1. Does FWHS want bid respondent to securely destroy the physical documents after validation of the digital scans and written authorization for?
 - a. If FWHS requires that scanned records be returned in paper, instead of secure destruction, is returning the content in the “prepped for scanning” state acceptable? As an example, this state means that a file may be returned without its original paper clips, staples, tags, and may contain scanning sheets used to process the file, with the file rubber banded together.
 - b. If the file needs to be returned in an alternative state, please describe what FWHS expectations are.

FWHS RESPONSE 133:

- 1) Yes, Securely destroy the physical documents after validation of the digital scans upon approval.
 - a. Yes
 - b. By client

QUESTION 134:

In the RFP, FWHS mentions “Migrate”, does this mean the bid respondent should include services to facilitate this migration from a legacy digital system?

FWHS RESPONSE 134:

Migrate in this context simply means the process of converting the existing hard copy files. There is no legacy digital system.

QUESTION 135:

If yes to Question 134, please answer the following questions with as much detail as possible for an accurate estimate (please repeat if multiple legacy systems exist)



1. Legacy System Name?
2. Version?
3. Database Backend (MSSQL, MYSQL, PostgreSQL, etc.)?
4. Number of Databases?
5. Document Record Count in Database?
6. Number of Index Fields Per Record?
7. Database Size (MB)?
8. Image Store Size (GB)?
9. Average Page Count Per Document?
10. Number of Folders/Container Objects?

FWHS RESPONSE 135:

N/A

QUESTION 136:

What file types are stored in the system? (TIFF, PDF, Word, etc.)?

FWHS RESPONSE 136:

PDF, Word, Excel

QUESTION 137:

Do files need to be Content Searchable?

FWHS RESPONSE 137:

Yes, the content should be searchable

QUESTION 138:

Are files Annotated? (In most cases we will not convert annotations)

FWHS RESPONSE 138:

Some of the files do contain annotations.

QUESTION 139:

Do you contain files that have multiple versions?

FWHS RESPONSE 139:

Yes

QUESTION 140:

Are files transportable? (Perform at customer location or Perform Offsite)?





FWHS RESPONSE 140:

Yes

QUESTION 141:

How will data be delivered to our migration team?: (Remote Access to your server or shipped via an Encrypted Hard Drive)

FWHS RESPONSE 141:

Remote access would be the most cost effective if possible.

QUESTION 142:

Scanning systems in place. For the scanning requirements of this project, does Fort Worth Housing currently have scanners in place and if so could you share what those systems currently are that will be used? If not, Did Forth Worth Housing need to have those included in the response?

FWHS RESPONSE 142:

FWHS has multiple Xerox MFPs under contract. FWHS is open to respondent recommendations. Those can be included in the response.

QUESTION 143:

The RFP Mentions Non-Proprietary or open file format requirement. Does this include common user application formats like Microsoft Word, Adobe Acrobat, etc. (used for document viewing of objects contained in EDMS)? Or is the intent of this requirement that we won't convert incoming document/objects into a non-standard viewing format?

FWHS RESPONSE 143:

The intent of this requirement is to prevent a non-standard viewing format.

QUESTION 144:

Can you describe you current VDI environment and systems in use so we can verify connection of scanning devices in support of application?

FWHS RESPONSE 144:

FWHS utilizes a cloud-hosted VDI+Server platform where this Document Management app will be hosted. We utilize Citrix for remote access to our entire environment.



**QUESTION 145:**

Backlog scanning – Should RFP Propose services to perform the backlog scanning service and cost inclusion?

FWHS RESPONSE 145:

Yes, Provide the scanning services as a separate quote/cost.

QUESTION 146:

Preference for On-Premise Server environment or is Cloud Service preferred?

FWHS RESPONSE 146:

Cloud Service Preferred

QUESTION 147:

Requirements state a need for ‘No Programming’ integration with ECS. Is this a hard requirement for proposal consideration. Most integrations will require some coding to make the environment most beneficial and efficient for end users.

FWHS RESPONSE 147:

FWHS is aware that there will be a certain amount of programming required to properly integrate with Elite. The intent is to not modify the Emphasys product coding which could inhibit Elite functionality.

QUESTION 148:

Office 365 directions – Do you have directions to use Office 365 (online) for application use?

FWHS RESPONSE 148:

FWHS is not using Office 365. Our current environment utilizes Exchange 2016 and Office 2016 located on cloud servers.

QUESTION 149:

What is the anticipate number of users of the system? Do you want dedicated user licensing? (Named)

FWHS RESPONSE 149:

One-hundered ten (110) users, Please provide pricing for concurrent user licenses and per seat licenses.



**QUESTION 150:**

Item 32: converting data to new system. Please provide what the existing system is. Or if ECS Lite and after data migration an integration will no longer be needed?

FWHS RESPONSE 150:

There are adobe PDF's, Microsoft office documents and physical paper files. Currently there is no existing document imaging system in place. Emphasys Elite will continue to be the main operations software of the agency after the document imaging software has been implemented.

***** END OF ADDENDUM NO. 3 *****

Kelvin Noble

Kelvin Noble
Director of Procurement