October 11, 2013

RFP 34-0217
Business Process Automation, Document Management & Customer Relationship

Questions & Answers

Q1: Since [our product] is priced on a per-user basis can you clarify the total number of users needed?
   a. All 600 employees of UC Hastings?
   b. 93
      (System Admins, Dept. Admins, Approvers) + 50 (Guest Approvers) + 1200 (Requestors) = 1,343 Total?

A1: Answer: For ECM: 93 (System Admins, Dept. Admins, Approvers) + 50 (Guest Approvers); the number of Guest Approvers are rough estimates at this time.

Q2: Can you clarify how many users are UC Hastings Employees and how many are “external” or 3rd party?

A2: 93 (System Admins, Dept. Admins, Approvers) are UC Hastings Employees; 50 Guest Approvers may be part time UC Hastings employees or external/3rd party

Q3: As well as how frequently each will need access to the system?

A3: 93 (System Admins, Dept. Admins, Approvers) may access the system throughout the year; the 50 Guest Approvers and 1200 requesters/document consumers will access the system only occasionally.

Q4: Will “external” users need to be on the system forever or only certain periods of time (the latter allowing for the deletion and re-use of users)?

A4: "External" users will only need to use the system certain periods of time (allowing for deletion and re-use of users would be preferred).
Q5: Pricing-wise, are you looking for our list price, a final price, or a starting point? We’re always willing to work with you on different pricing structures, especially with all different types/levels of access, so just want to be clear if this proposal needs the end all be all price.

A5: Pricing-wise – a competitive starting price point would be good. Final prices can be determined after a more detailed discovery session.

Q6: For 7b (in the Cost estimate area), again are you looking for our rates or a final number? It’s harder to come up with a final number without a discovery session. Also, to be clear, SpringCM is configurable and requires no “customization,” but that configuration/assistance does come with a one-time cost/engagement. Is that something we should include for this piece?

A6: Rates would be preferred (we understand final numbers would be more accurate after a discovery session). Please include the one-time cost/engagement and breakout ongoing versus one-time cost.

Q7: Is there a date you are looking to make a decision and sign up with a vendor?

A7: The decision may be completed mid-late November barring approval by Dec 9 (after the Dec 6, 2013 Board of Directors Meeting).

Q8: Are you planning on purchasing both CRM and ECM at the same time or separately? If separate, which comes first?

A8: At the same time to ensure a coordinated integration.

Q9: How would you like the response submitted (email, paper copies, etc)?

A9: E-mail.

Q10: Can UC Hastings provide examples of the Student ID Request, Leave of Absence and Withdrawal Form?

A10: See attached forms

Q11: Can you provide examples of sample docs related to Residential Lease Database?

A11: See attached documents – Lease agreement template, Application to Rent for Exchange Students and Application to Rent for Students (Non-Exchange)
Q12: Regarding sections 1.2; 1.3. 1.4. - Would UC Hastings like to implement all solutions in the initial deployment? Or would UC Hastings prefer a phased approach? Would you prefer a recommendation?

A12: UC Hastings would prefer a focus on Phase 1. Phase 2 is not a priority: 
Phase 1 – Electronic Form Design (Section 1.2) and Workflow triggered by a form or document submitted (Section 1.3a) and Digital Signatures (Section 1.4).
Phase 2 – Workflow triggered by a remote system (Section 1.3b) and Workflow triggered by a change in person data delivered from another system (Section 1.3b and 1.3c)