



Addendum No. 2

Request for Proposals ADM-23-02 ELECTRONIC DOCUMENT AND RECORDS MANAGEMENT SYSTEM SOFTWARE

The addendum is being issued prior to the closing of the Request for Proposals to provide further information, make changes to, or to clarify the Contract Documents and is to be read, interpreted and coordinated with all other parts of the Contract Documents. In the case of a conflict with the balance of the documents, this Addendum shall govern. Proponents shall attach a signed copy of this addendum to their proposal. This addendum shall form part of the Service Agreement.

Question 1: Page 16, “Contract Duration”. What is considered to be the conclusion of the contract for October 31, 2023?

The conclusion is considered to be the completion of technical requirements and training requirements. In general, this would be the installation of the system, set-up, testing, and confirmation it works as intended. Training would be at least the admins and the one for train-the-trainer. Section 7.3 contains additional information and requirements.

Question 2: What is the anticipated roll-out method: for all departments all at once, or department-by-department?

The intended roll-out is department-by-department. Once the system is operational the software must be able to be installed on individual user computers by RDFFG IT and training would be provided to the departments by the Records Management Coordinator.

Question 3: Workflow Functionality (Page 23). Are there any specific processes that have been identified that will need to be configured within the systems workflow capabilities within the scope of the project? If so, how many or which processes?

Some specific processes we are expecting are identified in section 5.1, “EDRMS Requirements...” (Page 13) and includes:

- Audit trails
- Version control
- Auto deletion
- Disposition workflows
- E-mail uploading
- Legal holds
- Classification of records

In general, common records management workflows are anticipated to become a digital workflow in the EDRMS where possible.



For example, current vision for disposition would be either:

- Automated Identification
 - Records have already been classified with a classification code that has a retention period attached to it.
 - Admins are notified that records are ready for disposition
 - Admins are able to generate department specific reports that can be sent to the Department Heads for their review and approval (within the system)
 - Department Heads approve or deny the records disposition
 - The records approved for disposition are sent to the General Manager of Legislative and Corporate Services for final review and approval.
 - Records approved by the General Manager of Legislative and Corporate Services are deleted from the system and a report is generated for the Admins
- Automated deletion
 - Certain record types are safe to delete without approval (i.e. drafts of reports)
 - Records meeting this certain criteria are deleted without approval
 - A report is generated for the Admins

Note: These are only examples and are not expectations of actual workflow.

Question 4: Workflow Functionality (Page 23). Can further elaboration be provided in regards to Question 13, “Workflow processes with other systems, as defined in the RFP”? What specifically is required for this?

Ideally, the RDFFG should be able to create their own workflows using API, or able to create workflows with support from the vendor of the selected software.

Question 5: Workflow Functionality (Page 23). In regards to question 14, “Auto upload documents from other systems”, can examples be provided? Is this required within scope or just a functional capability?

Example: Our HUB system is used to manage our Building Permits, among a few other records. The records are primarily metadata that can generate a pre-formatted PDF that can be viewed to represent the collected metadata as a record.

This PDF and select limited metadata (i.e. property address, legal description, permit type, permit number, etc) would be automatically transferred or copied to the EDRMS.

We are currently aiming for functional capability.



Question 6: Would it be possible to expand upon the RDFFG integration requirements?

Currently the RDFFG uses multiple software applications that generate records. The goal is for the EDRMS to become the official repository of the RDFFG records generated from these applications, where possible and within reason.

VADIM, for example, generates financial records that should be considered as a final record. If integration is possible the records that are considered to be final records would be able to feed into the EDRMS directly. This could be either by a workflow the user can initiate within VADIM, and automated workflow between VADIM and the EDRMS, or another method not yet determined.

The general goal of integration would be to allow software to speak to each other, where possible, so users do not have to export the record and manually upload it into the EDRMS.

Question 7: Is the selected vendor responsible for implementing the integrations listed as part of this RFP, or is it simply expected that the solution will support integrations? Would the RDFFG be able to provide SQL statements and queries for integrating?

It is primarily expected that the solution will support integrations. The RDFFG IT Department should be able to provide SQL Statements and queries for integrating. Support may be requested from the EDRMS vendor and the other vendor software we are attempting to integrate with.

Question 8: Can we confirm the list of document and records management systems currently being used and their respective volume of data?

At the moment HUB is the only software with document management functionality. The other applications either output data as documents and records, or display data.

On February 15, 2023 HUB was confirmed to store about 10 GB of files (74000 documents, 2000 revisions).

Question 9: How is SharePoint Online currently being used and how would you describe your staff's familiarity with this platform?

Users are primarily on SharePoint 2016, however we are upgrading to SharePoint Online.

Currently, SharePoint is used for our Intranet and is not intended as the final destination for records and documents. Majority of staff experience of SharePoint is to access the intranet.

Question 10: How many departments will require access to the EDRMS solution? How many staff are in each department?

All departments will require access to the EDRMS, however only specific employees will actually be using the EDRMS.



For example, our Environmental Services has a significant number of employees, however only a handful of employees will require access, as many of them work in the field and do not require access to our records.

Question 11: Is the RDFFG open to an electronic submission by email?

The Regional District will be issuing Addendum #3 to address this.

Question 12: What personnel will the RDFFG be providing for this engagement?

The Records Management Coordinator will be the primary personnel, and IT will be assigning a staff member to assist. Other IT staff may be involved based on requirements and specializations needed.

Question 13: Would it be possible to provide the current Microsoft licensing by quantity and type?

The RDFFG has a total of 108 employees.

The majority of the employees have desktop licenses (MO365 Business Standard). The workers who do not require much computer access have access to MO365 Online services (MO365 Business Basic).

We are unable to provide a total number at this time.

Date: May 4, 2023

Signature of Proponent

Name of Proponent

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